

ACTwatch

Evidence for Malaria Medicine Policy

Antimalarial Markets in 9 Malaria Endemic Countries

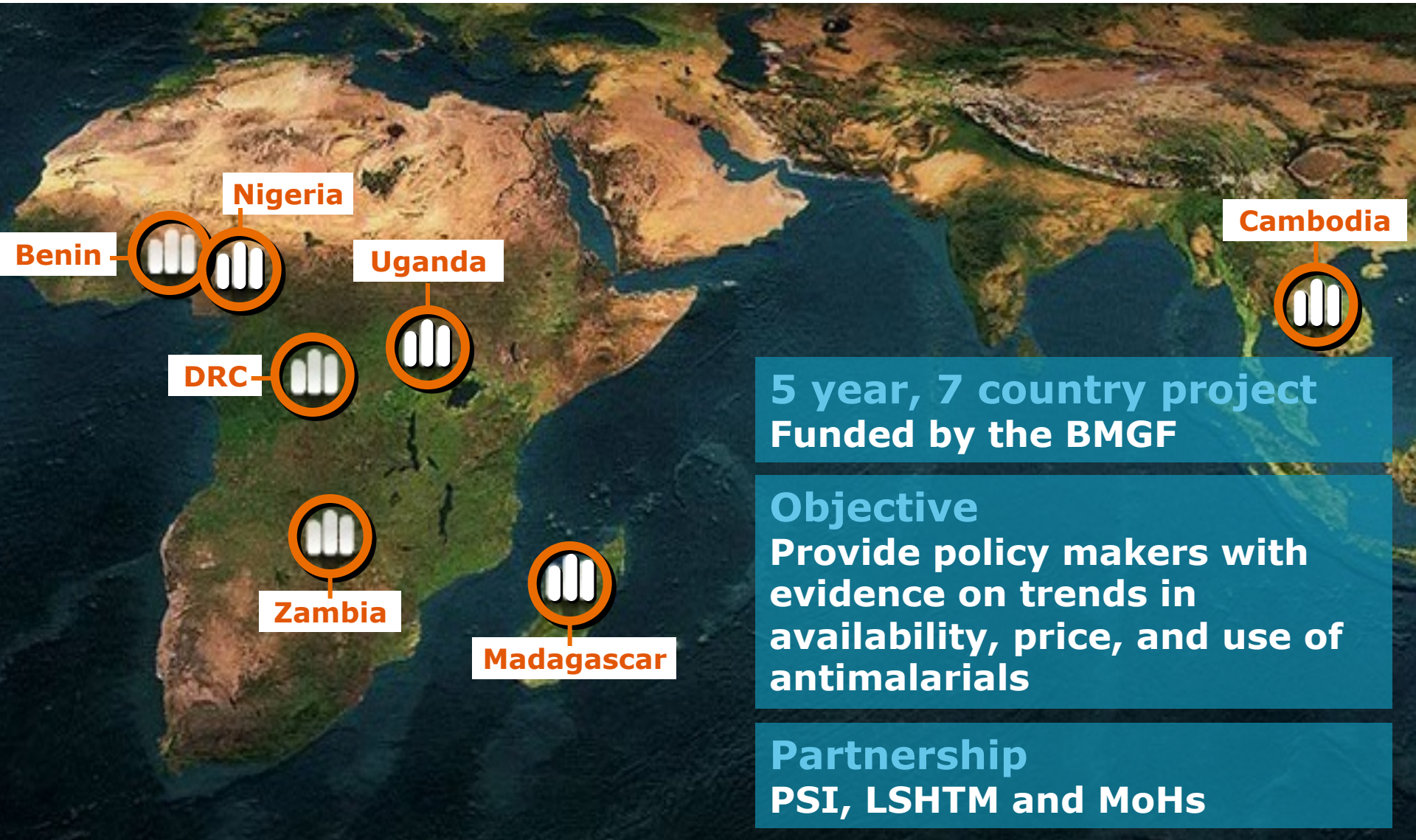
World Bank, 9th Dec 2011

Kate O'Connell

on behalf of the *ACTwatch* Group



What is ACTwatch?

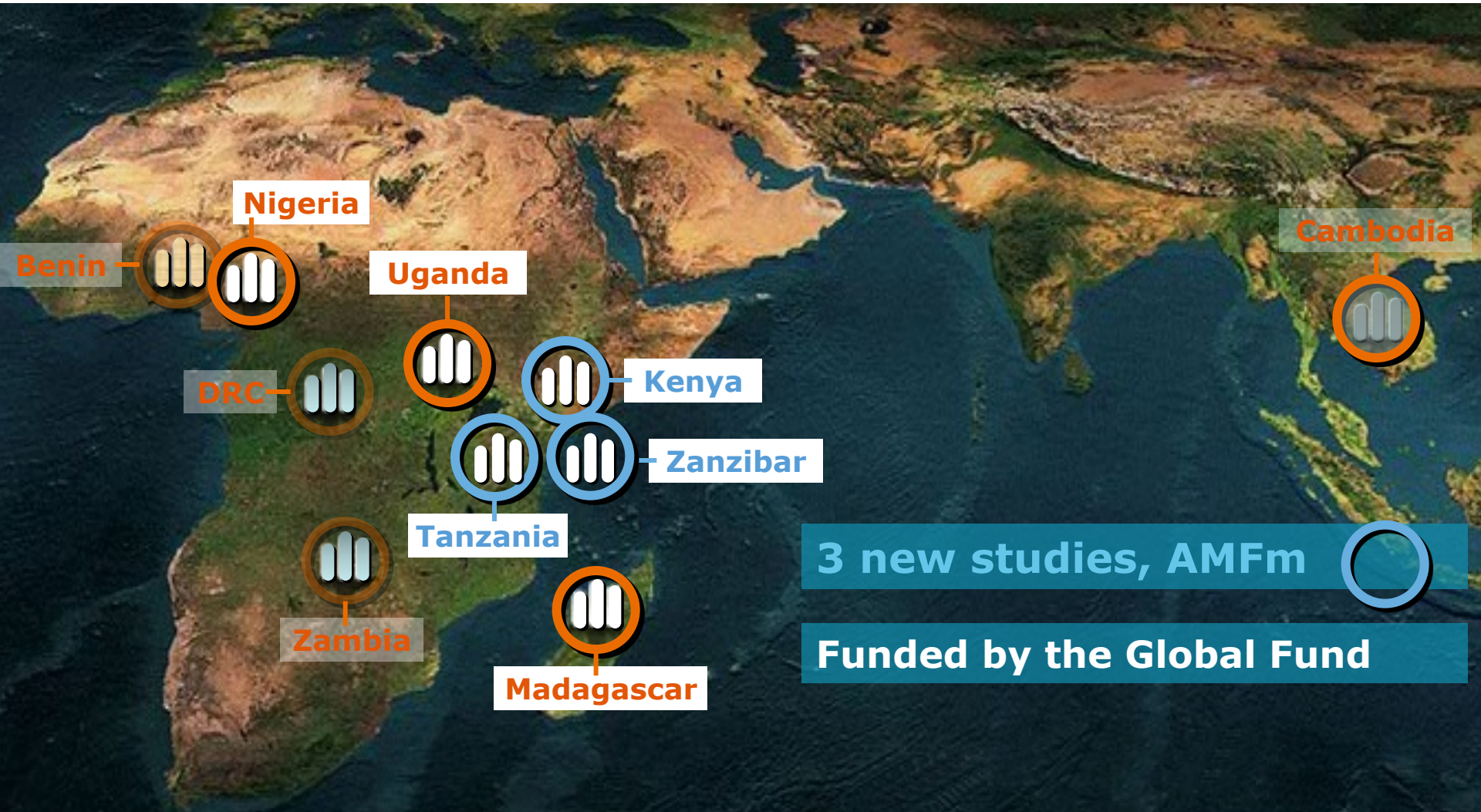



5 year, 7 country project
Funded by the BMGF

Objective
Provide policy makers with evidence on trends in availability, price, and use of antimalarials

Partnership
PSI, LSHTM and MoHs

As part of Independent Evaluation of the AMFm



3 new studies, AMFm 

Funded by the Global Fund

Some data presented may appear to differ from those in the Multi-country Baseline Report of the Independent Evaluation of the AMFm, Phase 1. However, the results are complementary as different indicators and denominators are sometimes used.

Research Studies - a complete picture of the market



Outlet Survey (PSI): What are the trends in the availability, volumes and price of antimalarials?
- Three times over the life of project.



Supply Chain Research (LSHTM): What are the determinants of the price and availability at different levels of the supply chain?
- Once over life of project



Household Survey (PSI): What are the trends in the levels of use of different antimalarials. What are the determinants of use?
- Two times (baseline & endline)

Outlet Surveys 2009-2011

Methods and Results



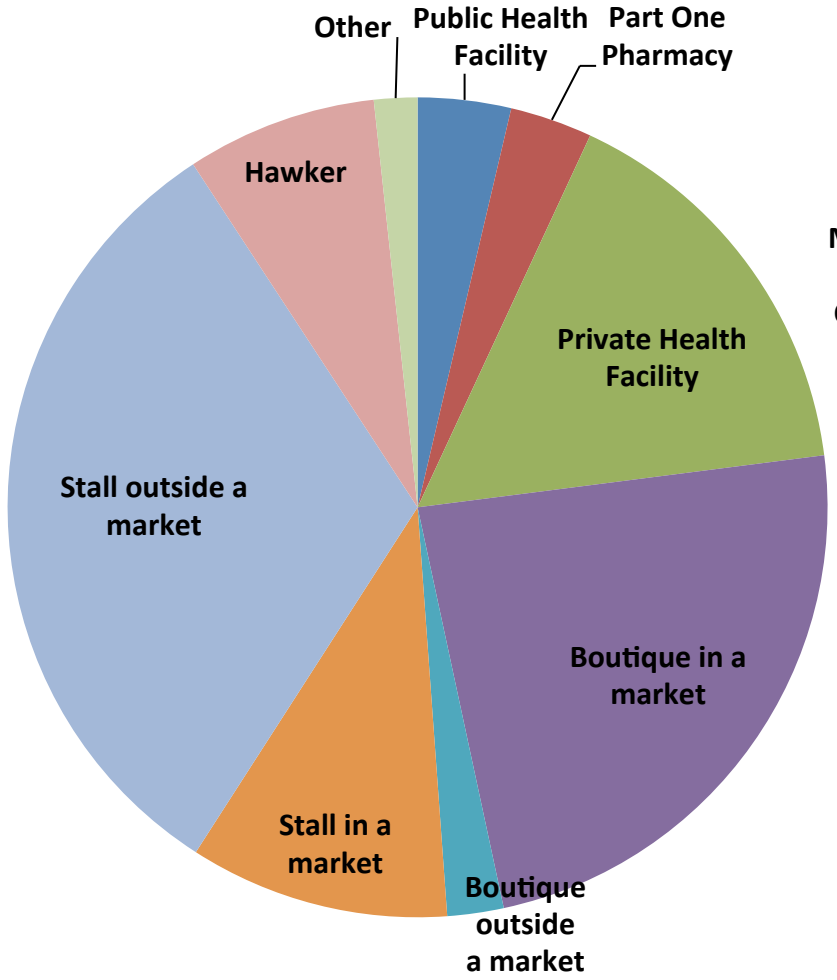
Outlet Survey: Methods



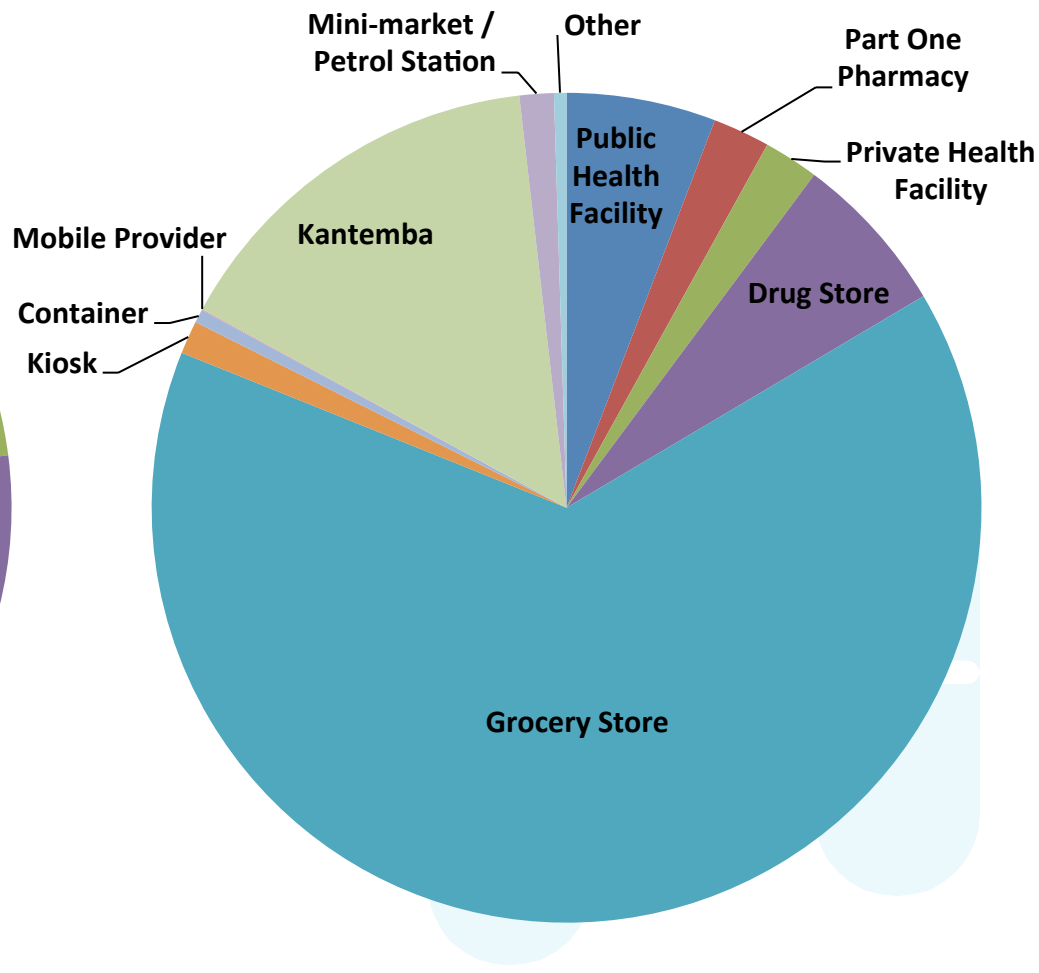
- Clusters were randomly selected proportional to population size
- Over-sampling of public health facilities and pharmacies
- Data were weighted to provide nationally representative estimates
- Audit sheet recorded:
 - generic name - brand name - formulation - strength
 - quantity in stock - expiry date - price
 - volume (quantity) dispensed in the last 7 days
- Census conducted of all outlets with the potential to stock antimalarials

Diversity of outlet types sampled

Benin



Zambia



2009-2011 Outlet Surveys - 9 Country Overview

55,811

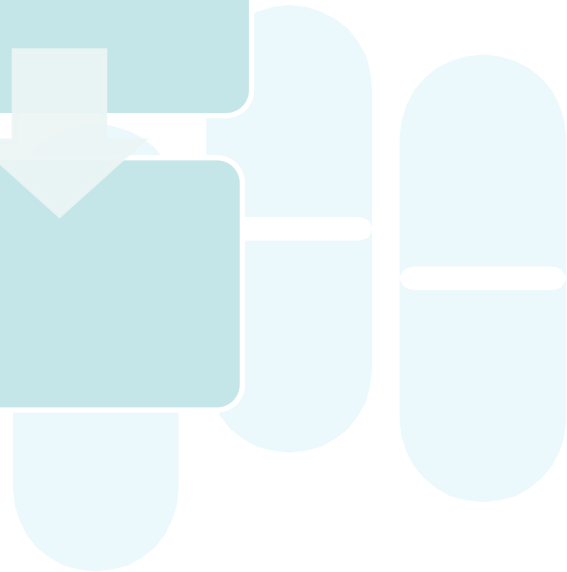
Outlets with potential to stock antimalarials were screened

14,171

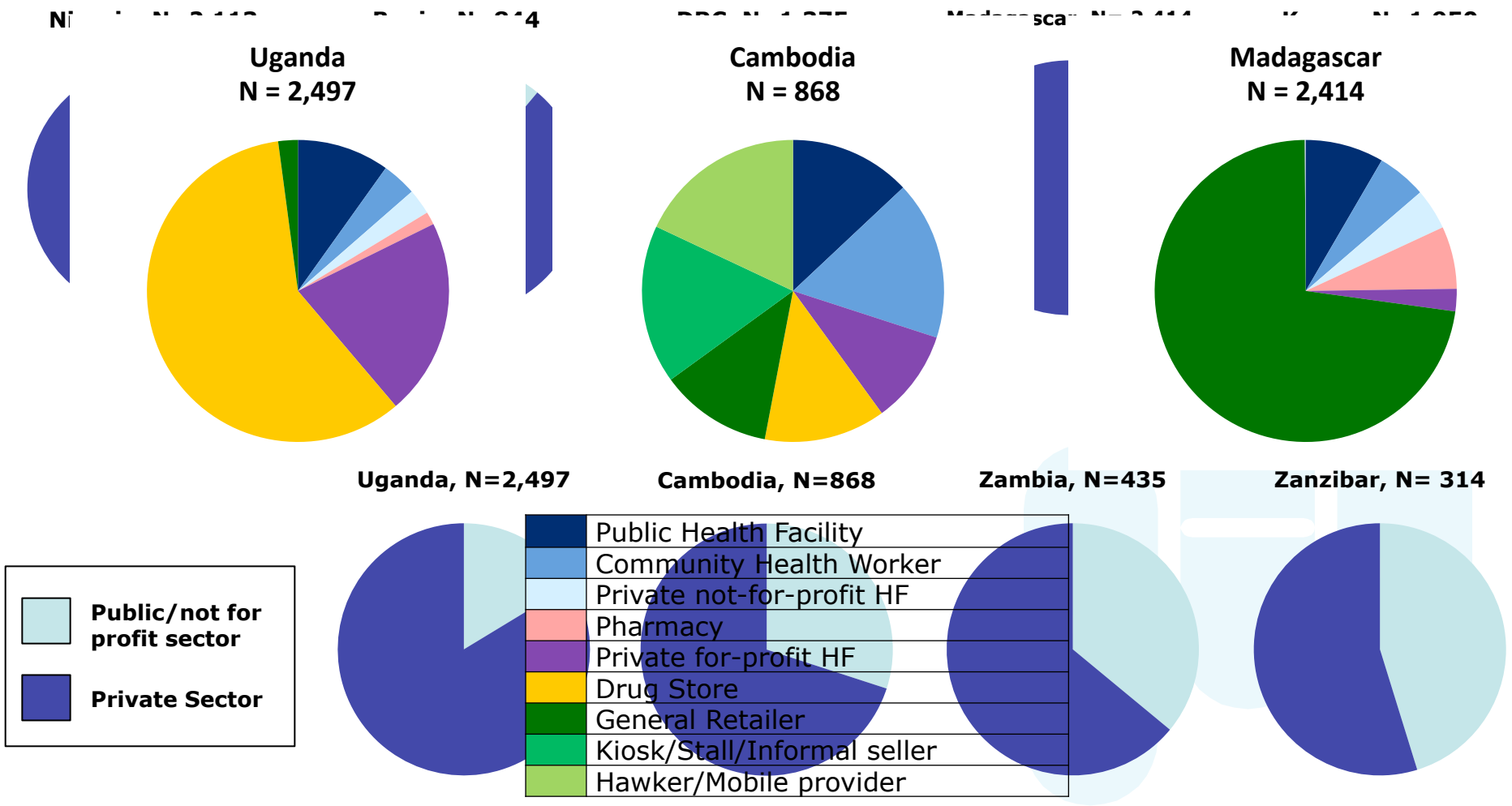
Eligible Outlets Interviewed

71,653

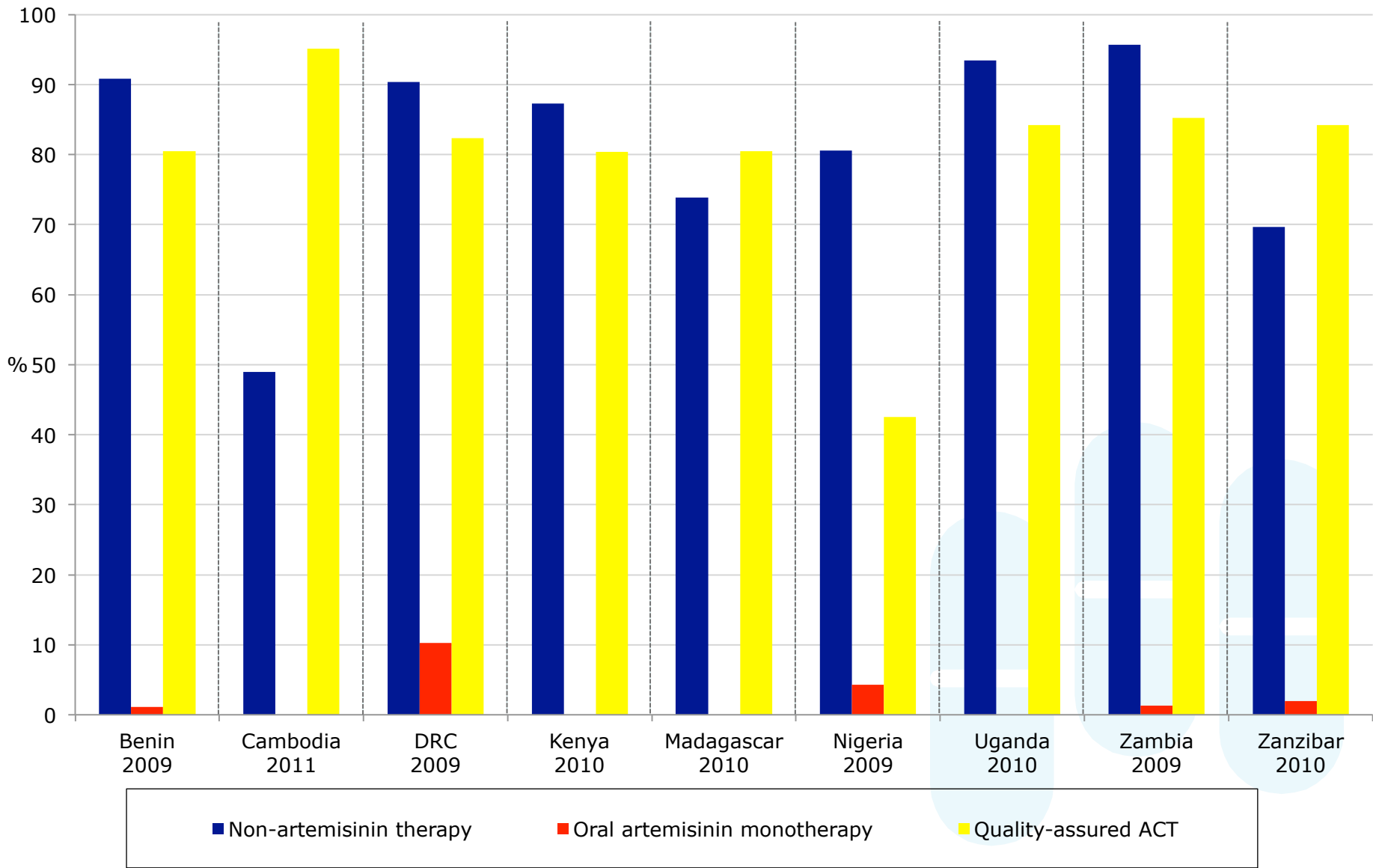
Antimalarials Audited



Relative distribution of facilities stocking antimalarials, by public/private/other types with antimalarials in stock

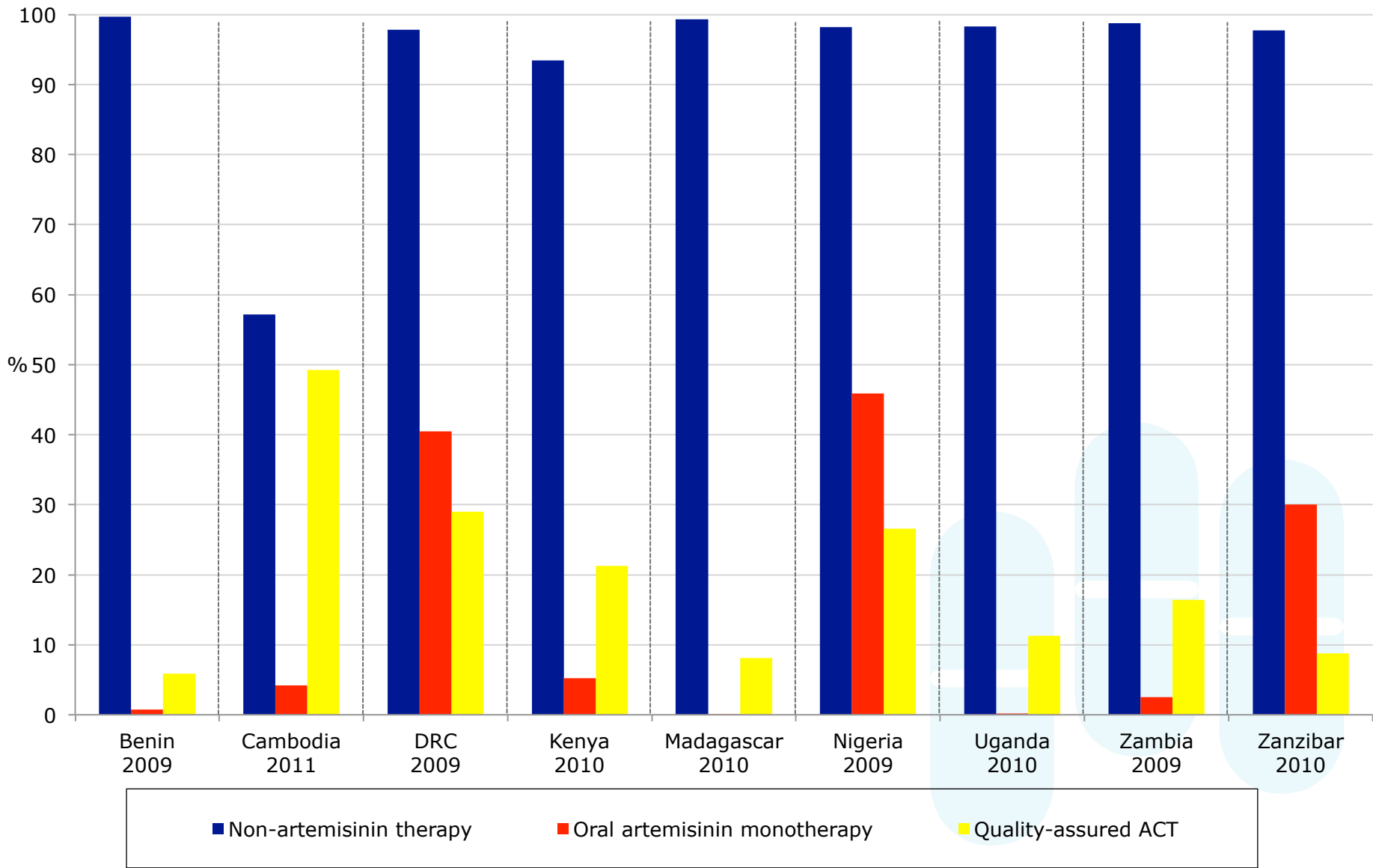


Availability of antimalarials among all public health facilities



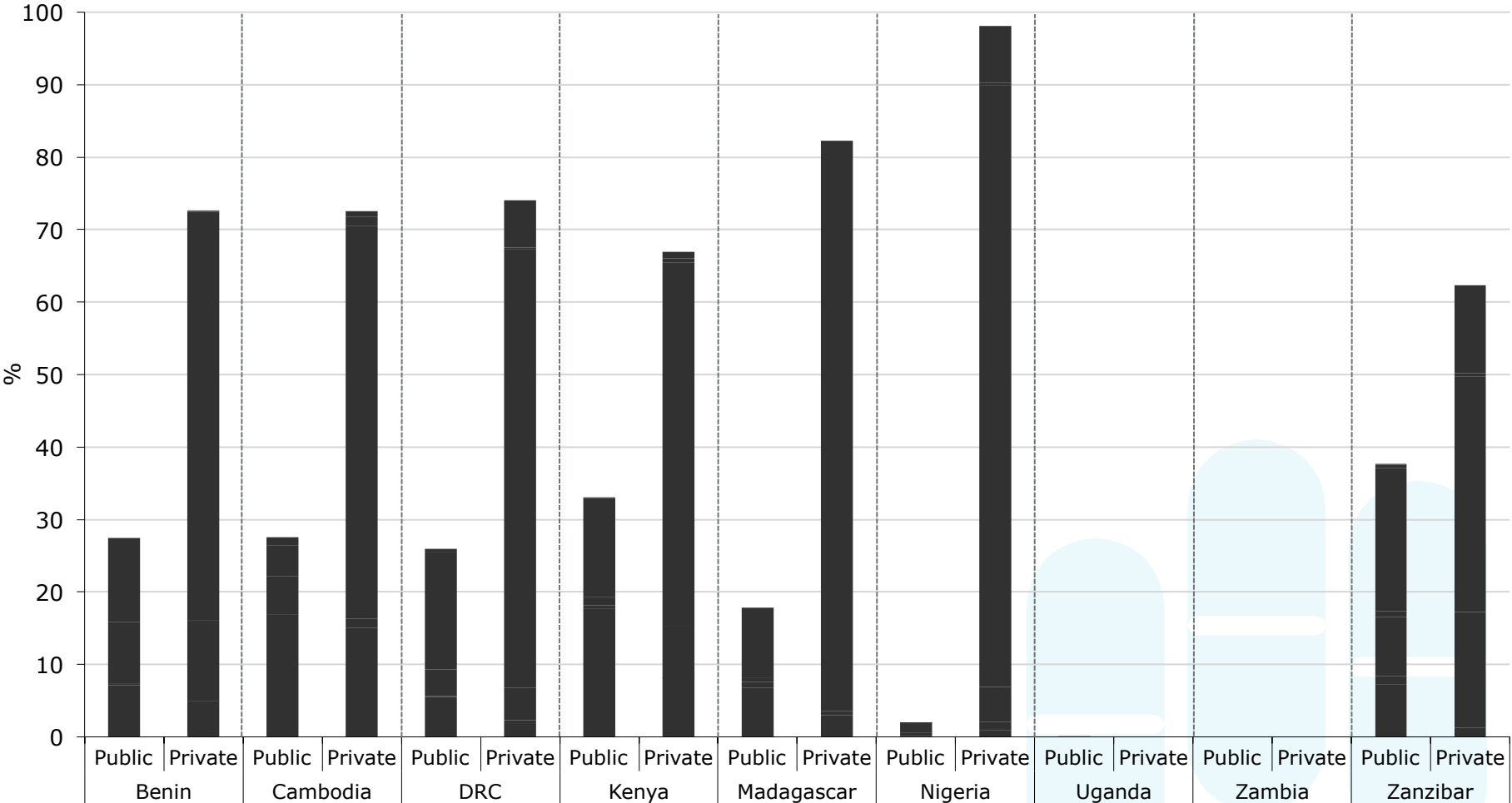
In Cambodia, the category "quality assured ACT" also includes any ASMQ & DHA-PPQ.

Availability of antimalarials among all private sector outlets*

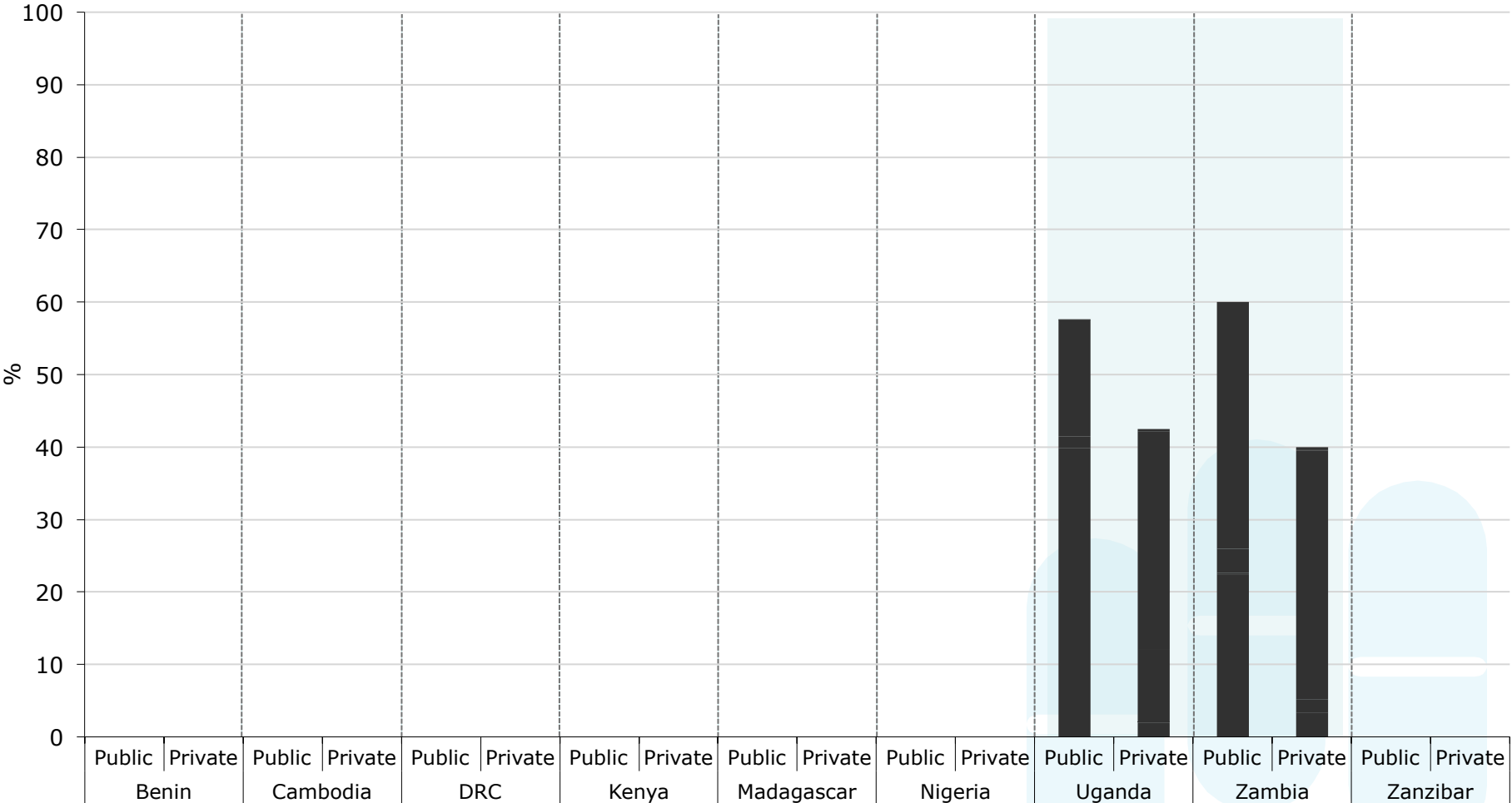


* Of those stocking at least one antimalarial drug

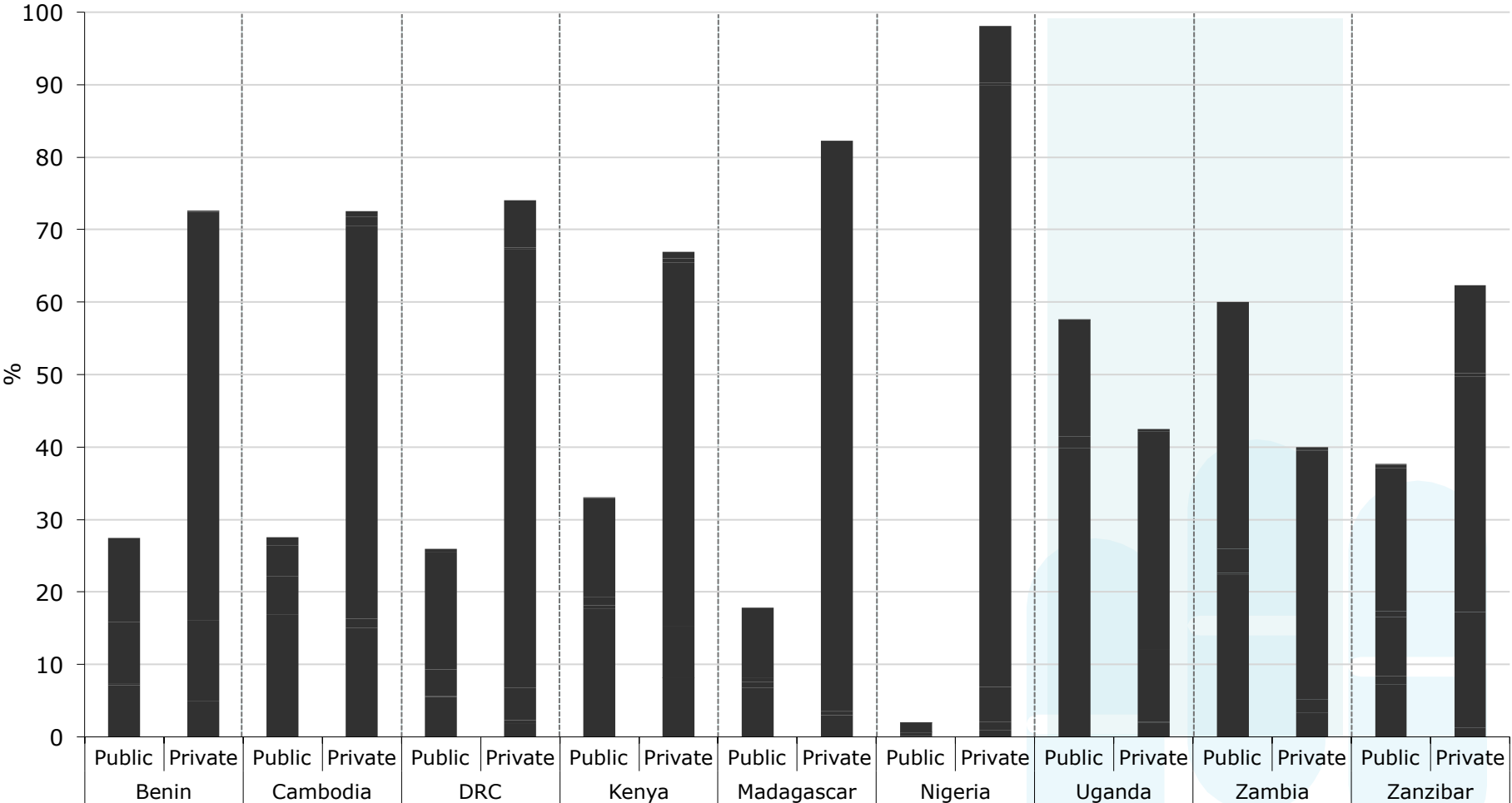
Relative volumes of antimalarials distributed, by sector



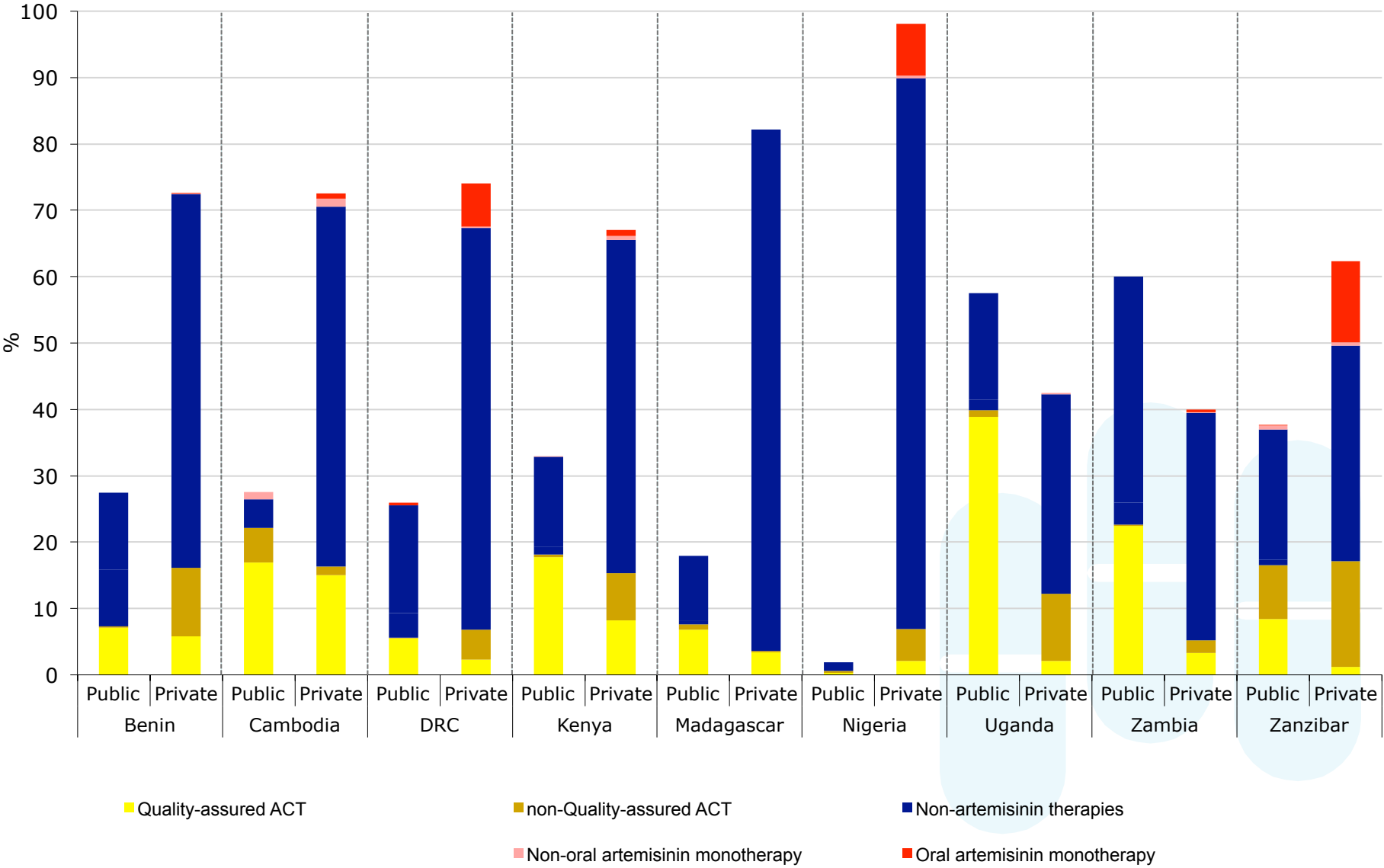
Relative volumes of antimalarials distributed, by sector



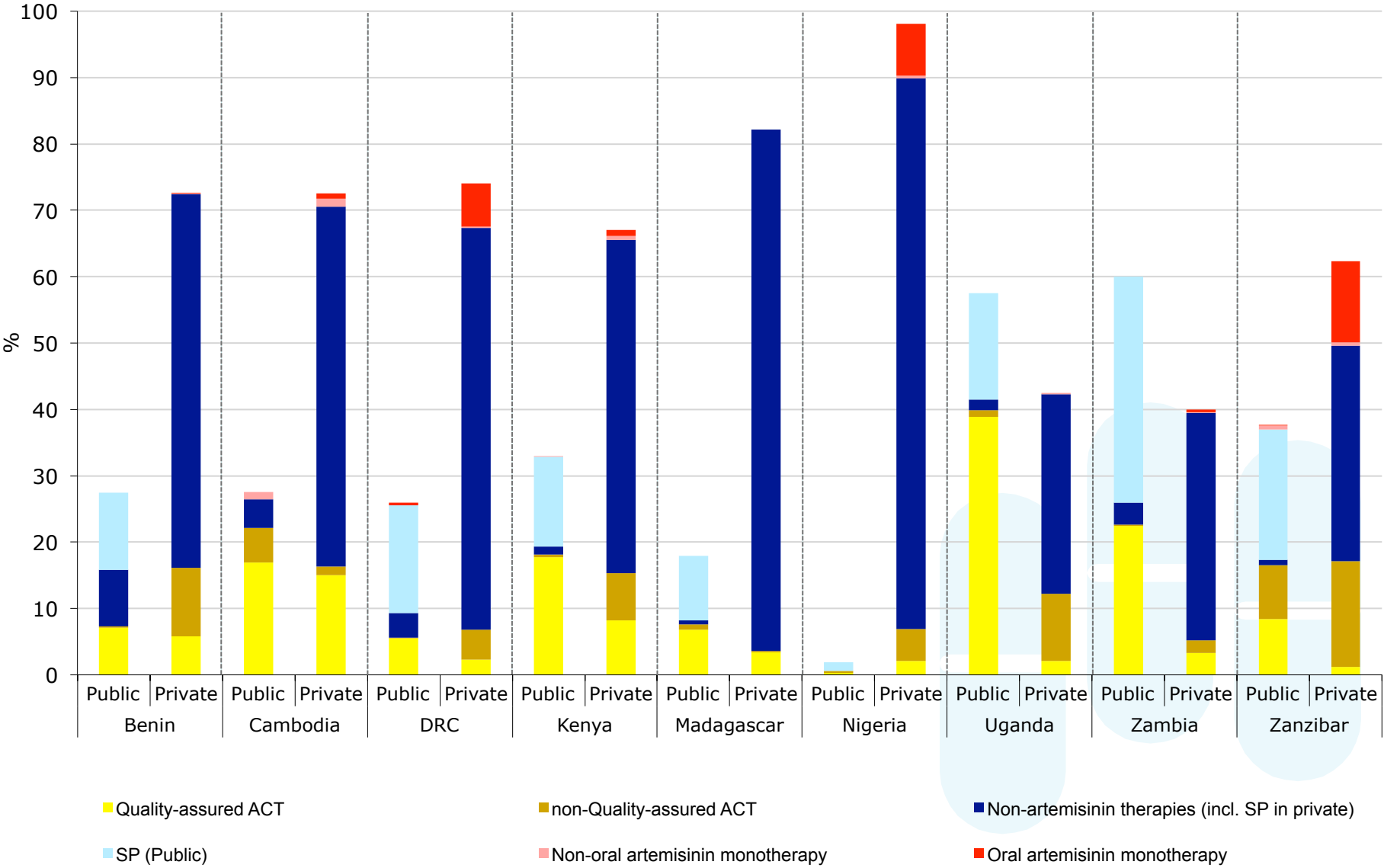
Relative volumes of antimalarials distributed, by sector



Relative volumes of antimalarials distributed, by sector and drug type



Relative volumes of antimalarials distributed, by sector and drug type



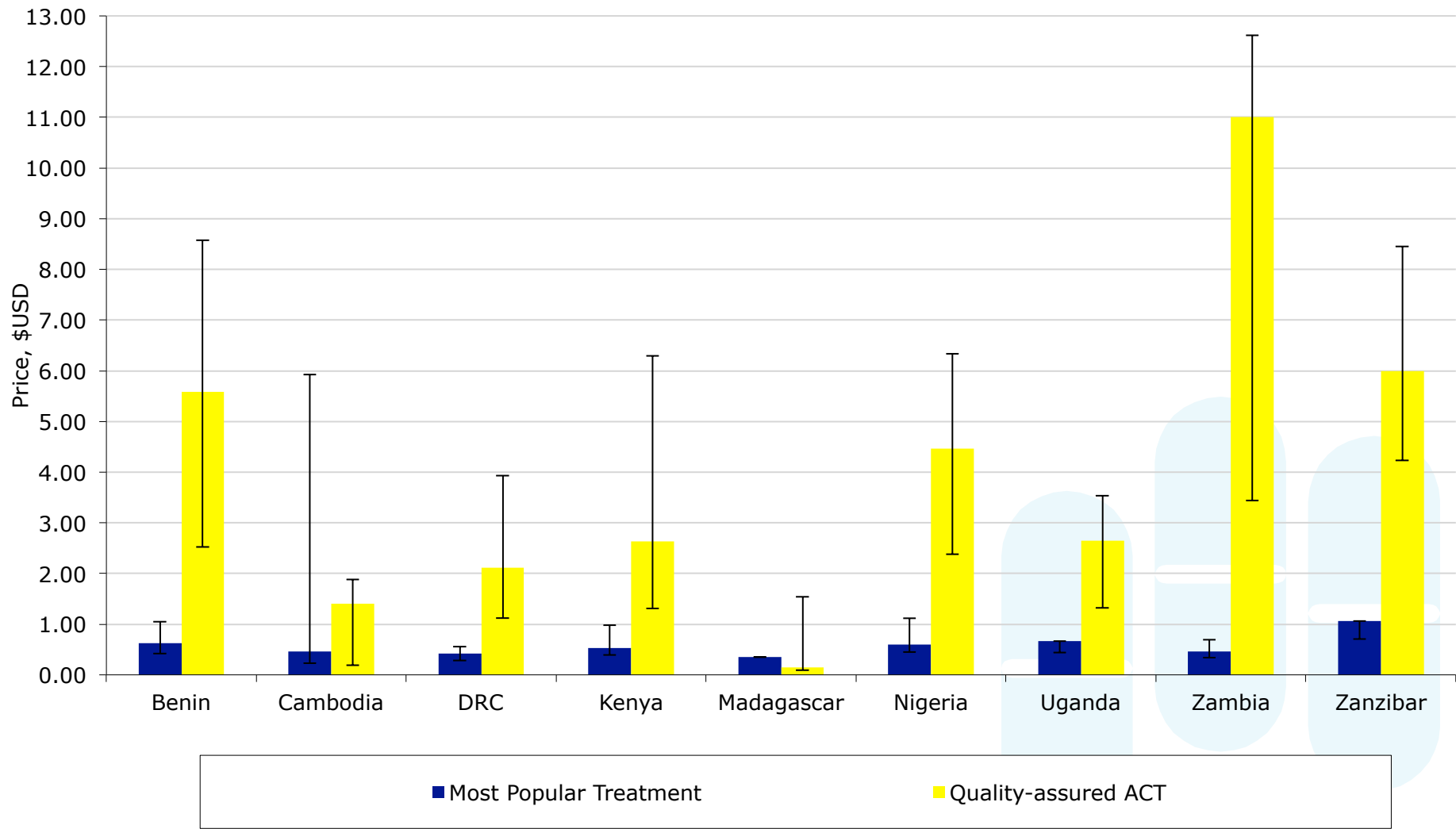
Price of Antimalarials in Public Sector

	Benin	Cam bodia	DRC	Madaga scar	Kenya	Tanzania	Nigeria	Ugand a	Zambia	Zanziba r
Median price of QAACTs in public health facilities	\$1.17	0.00	\$3.20	0.00	0.00	0.00	0.00	0.00	0.00	0.00

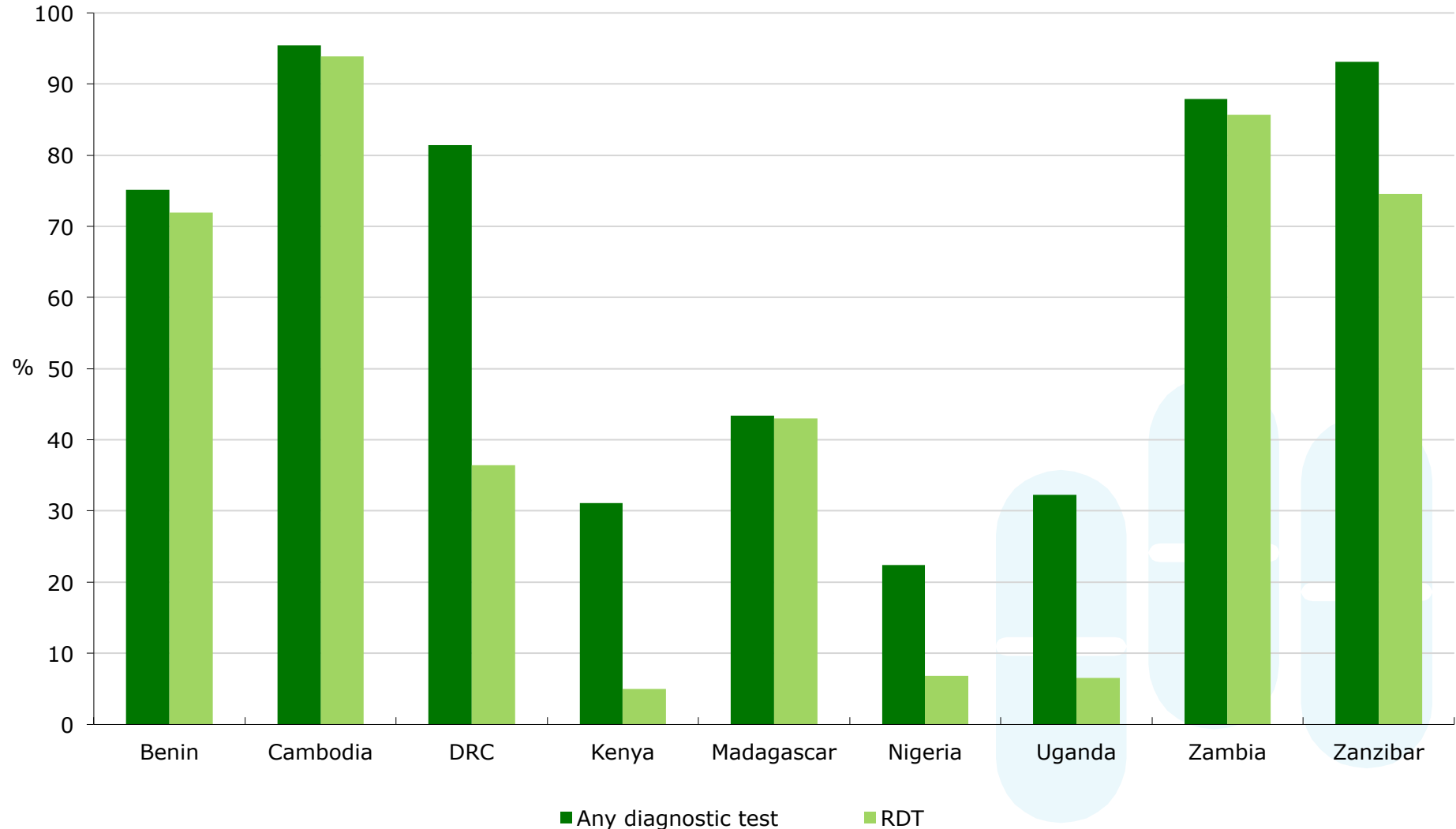


* Proportion for Nigeria based on volumes of child treatments, as insufficient data was available on the price of distributed adult treatments.

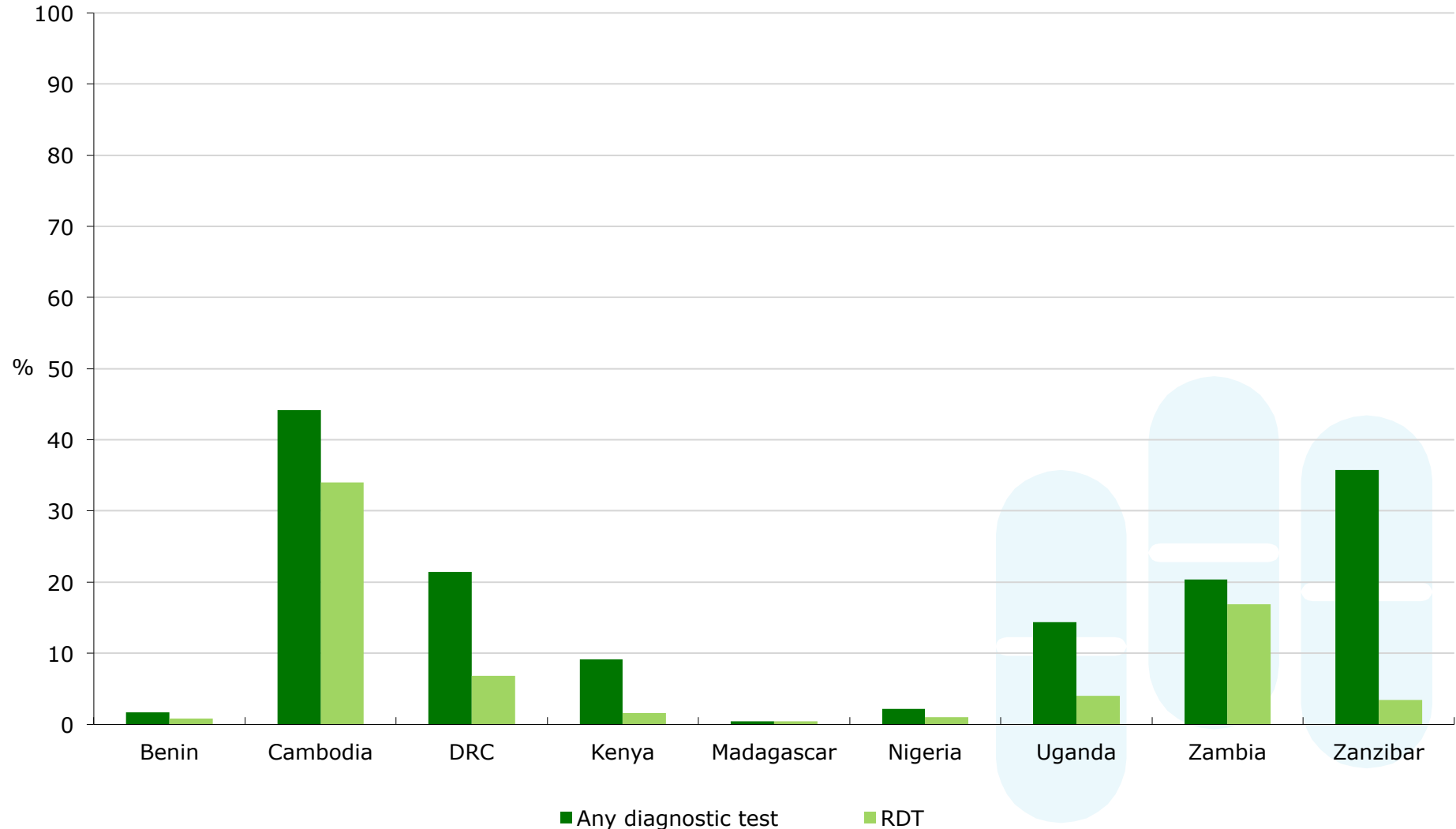
Median price (IQR) of full adult equivalent antimalarial treatments in the private sector



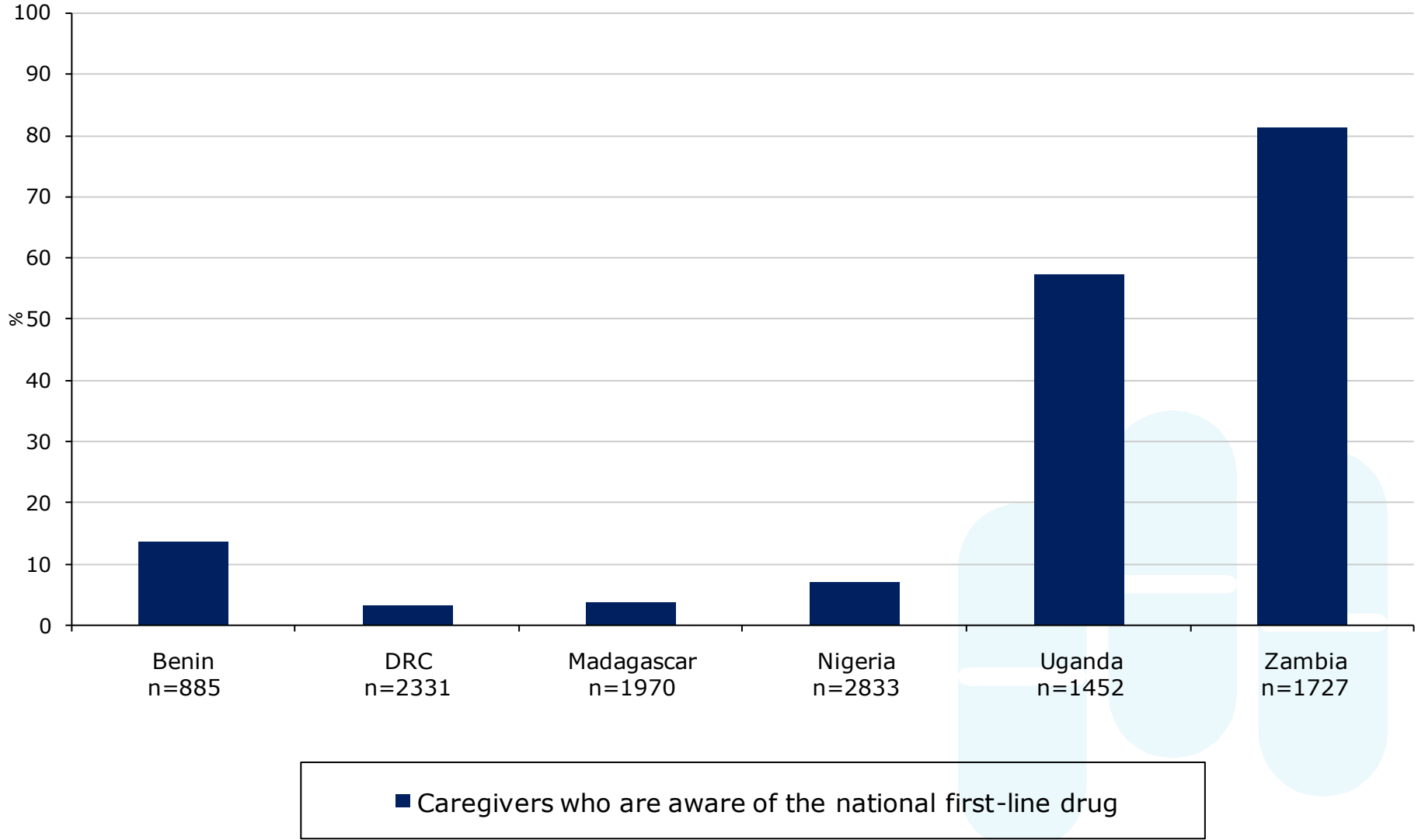
Availability of diagnostic testing in the public/not for profit sector



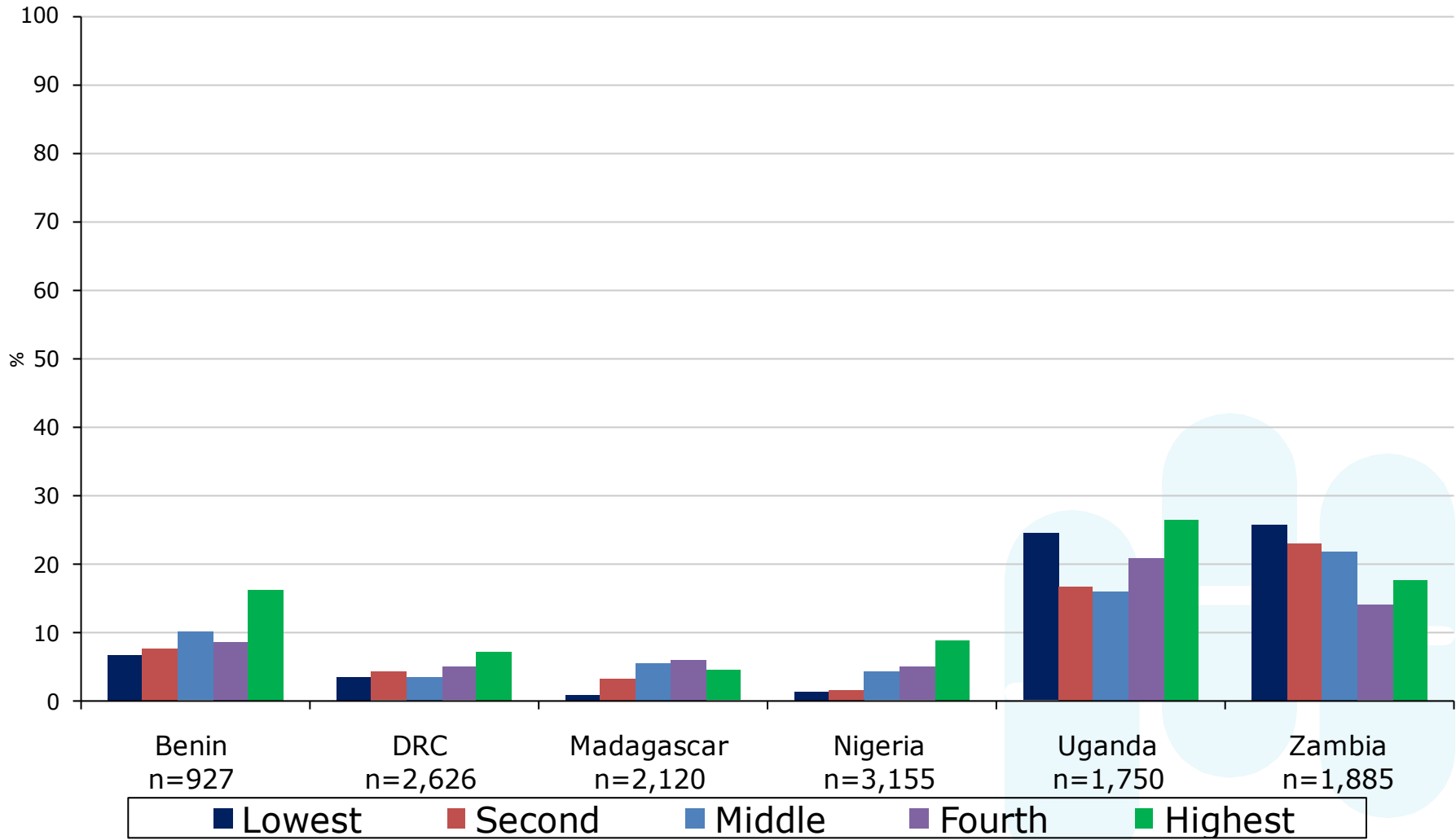
Availability of diagnostic testing in the private sector



Caregivers awareness of most effective treatment for malaria is low

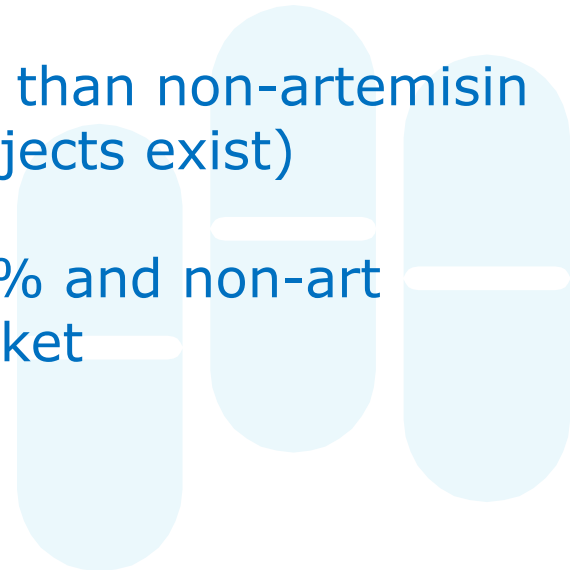


ACT treatment across household wealth quintiles



Conclusions of 2009/11 outlet surveys

- Diversity between countries of the outlet types that stock antimalarials
- Non-artemisinin therapy is widely available.
- ACTs are not found in the private sector, with some exceptions
- Private sector dominates the market (except Zambia & Uganda)
- ACTs are up to 25 times more expensive than non-artemisin monotherapies (except where subsidy projects exist)
- Volumes of QAACTs are low: from 5 – 40% and non-art monotherapy generally dominates the market



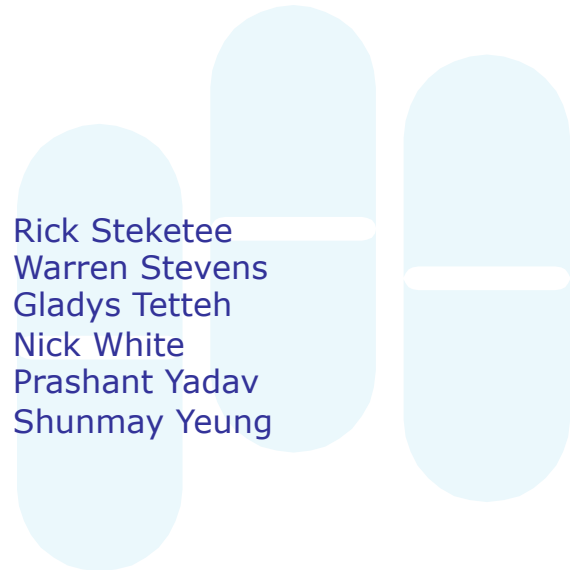
Acknowledgements

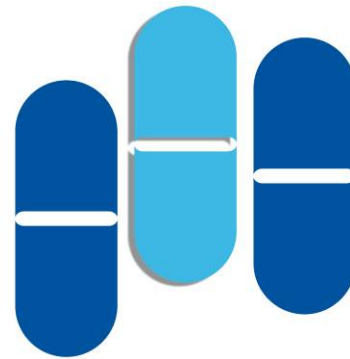
Bill & Melinda Gates Foundation

The Global Fund to Fight AIDS, Tuberculosis & Malaria

ACTwatch Advisory Committee

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- Dr. Shunmay Yeung





ACTwatch

Evidence for Malaria Medicine Policy

Note, data presented in this presentation may differ from the AMFm Independent Evaluation Report due to small differences in the categorisation of indicators or denominators.



Series Collection: ACTwatch

Methodology

Shewchuk, T; O'Connell, KA; Goodman, C; Hanson, K; Chapman, S; Chavasse, D The ACTwatch project: methods to describe anti-malarial markets in seven countries; *Malaria Journal*, 10:35

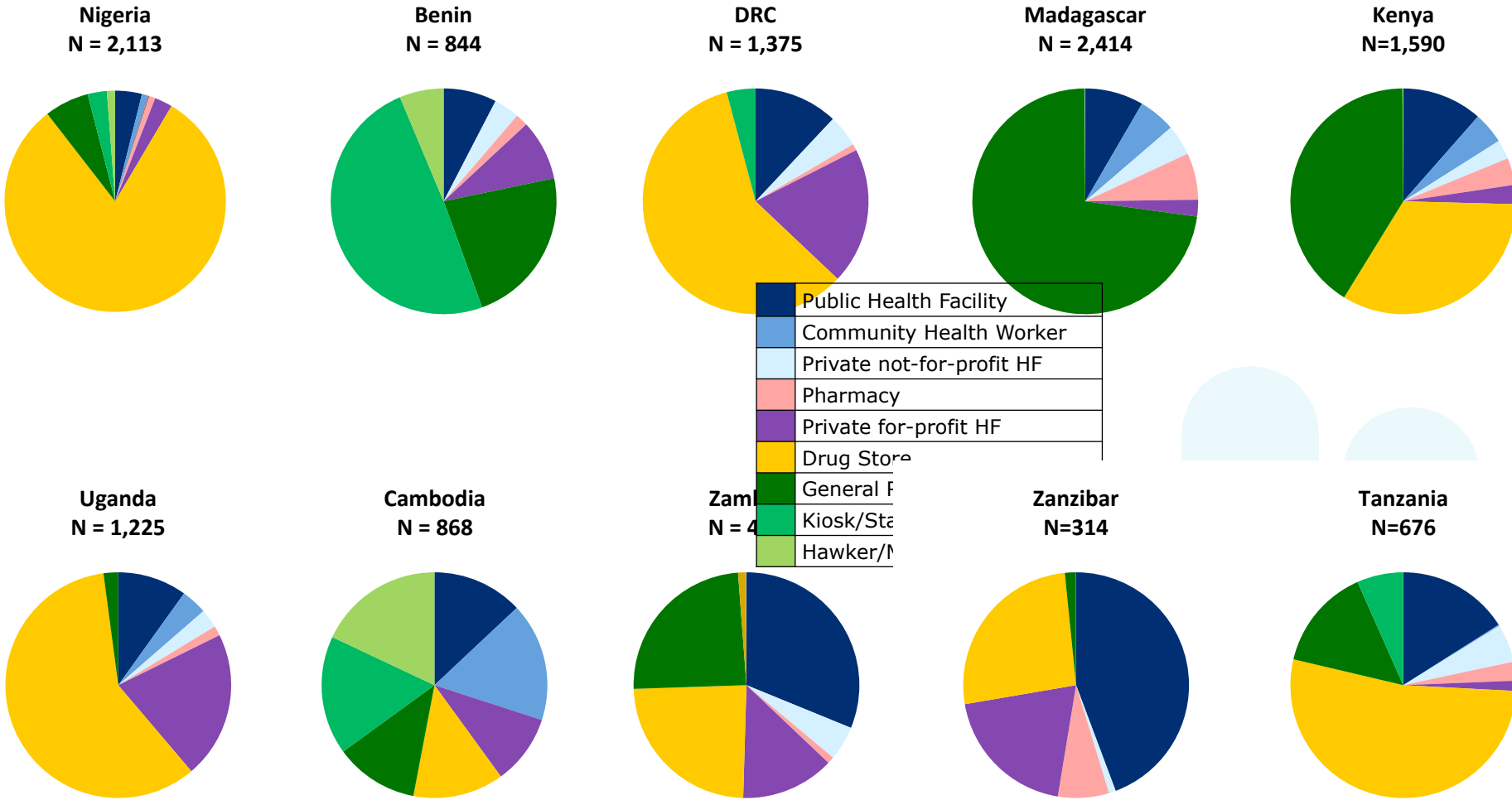
Research

O'Connell, KA; Gatakaa, H; Poyer, S; Njogu, J; Evance, I; Munroe, E; Solomon, T; Goodman, C; Hanson, K; Zinsou, C; Akulayi, L; Raharinjatovo, J; Arogundade, E; Buyungo, P; Mpasela, F; Adjibabi, CB; Agbango, JA; Ramarosandratana, BF; Coker, B; Rubahika, D; Hamainza, B; Chapman, S; Shewchuk, T; Chavasse, D Got ACTs? Availability, price, market share and provider knowledge of anti-malarial medicines in public and private sector outlets in six malaria-endemic countries. *Malaria Journal*, 2011, 10:36

Littrell, M; Gatakaa, H; Evance, I; Poyer, S; Njogu, J; Solomon, T; Munroe, E; Chapman, S; Goodman, C; Hanson, K; Zinsou, C; Akulayi, L; Raharinjatovo, J; Arogundade, E; Buyungo, P; Mpasela, F; Adjibabi, CB; Agbango, JA; Ramarosandratana, BF; Coker, B; Rubahika, D; Hamainza, B; Shewchuk, T; Chavasse, D; O'Connell, KA Monitoring fever treatment behaviour and equitable access to effective medicines in the context of initiatives to improve ACT access: baseline results and implications for programming in six African countries , *Malaria Journal*, 10:327.

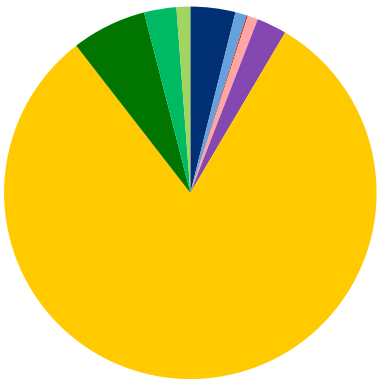
Littrell, M; Gatakaa, H; Sochea Phok, Henrietta Allen, Shunmay Yeung, Char Chuor, Lek Dysoley, Duong Socheat, Angus Spiers, Chris White, Shewchuk, T; Chavasse, D; O'Connell, KA Case management of malaria fever in Cambodia: results from national anti-malarial outlet and household surveys , *Malaria Journal*, 10:328.

No two markets are the same: Diversity of outlet types with antimalarials in stock

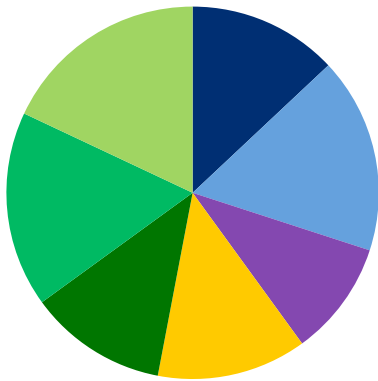


No two markets are the same: Diversity of outlet types with antimalarials in stock

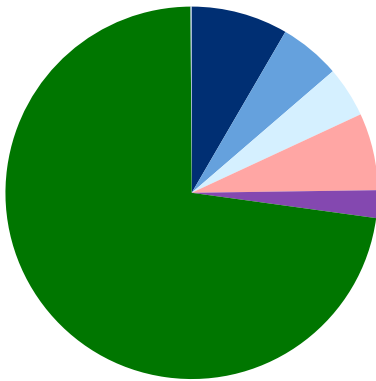
Nigeria
N = 2,113












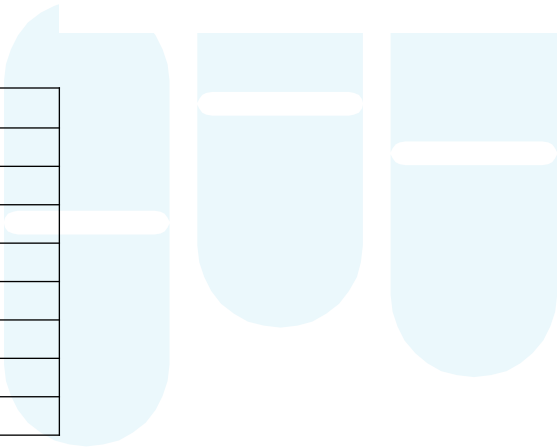
Cambodia
N = 868



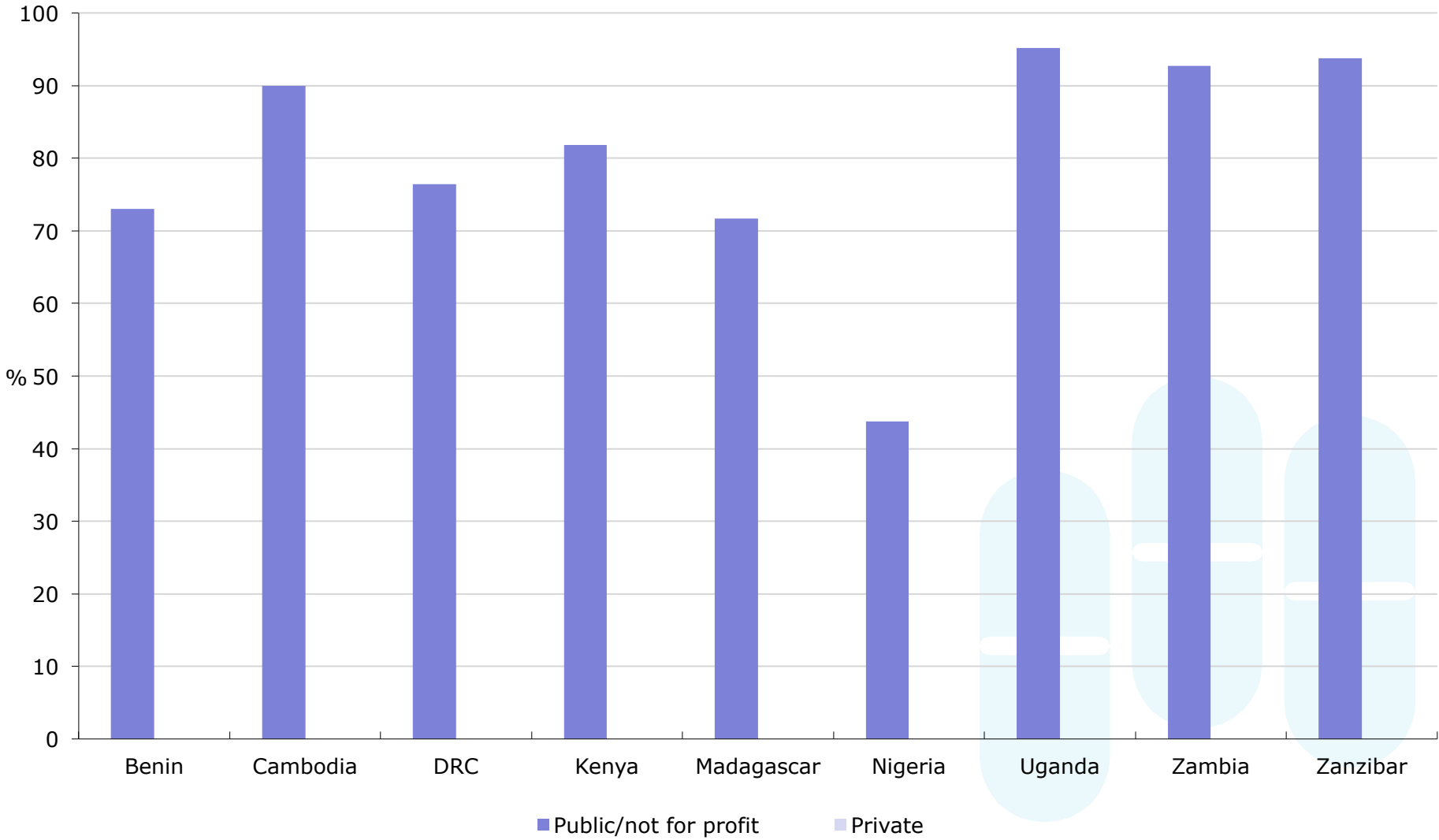
Madagascar
N = 2,414



	Public Health Facility
	Community Health Worker
	Private not-for-profit HF
	Pharmacy
	Private for-profit HF
	Drug Store
	General Retailer
	Kiosk/Stall/Informal seller
	Hawker/Mobile provider



Provider knowledge of first-line treatment, by sector



Provider knowledge of first-line treatment, by sector

