





## Vietnam is at a crossroads

- HIV epidemic concentrated in key populations, prevention and treatment efforts have contribute to a **steady decline in new infections**
- MoH has committed to 90-90-90 by 2020, and elimination of HIV by 2030
- But, 77.2% of the national HIV program is donor funded, and...
- With Vietnam attaining middle income status, **major donors have left** or dramatically **reduced** size and geographic scope of programs

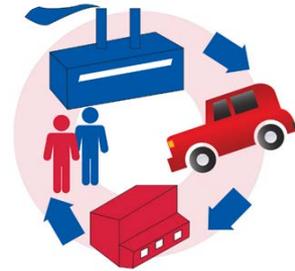


## The good news...

- With the reduction of free/partially subsidized condoms, the commercial market is able to grow
- There is an incentive for local condom manufacturers to produce for the local market
- Increasing purchasing power, and willingness/preference to pay

## And the bad news...

- Condom market is unregulated, no mandatory standards apply, abundance of low quality and fake products



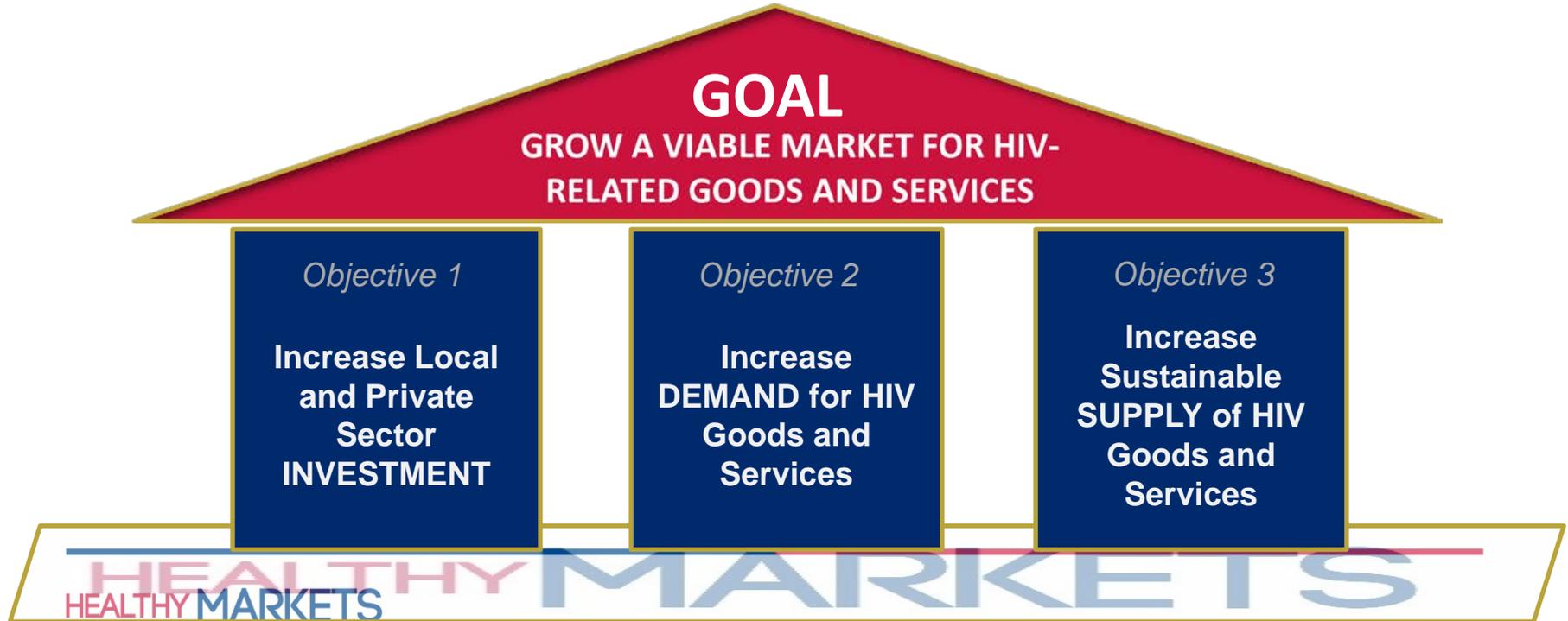
## Vietnam Has A Major Counterfeit Condom Crisis

Published on Wednesday, 11 June 2014 10:20  
Written by Saigoneer.



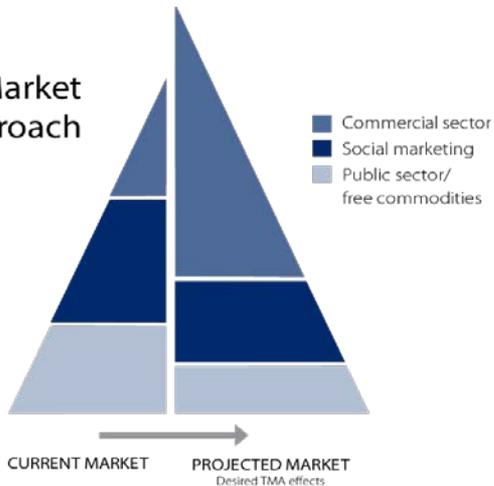


# Building a sustainable response





Total Market Approach





# Condom TMA goals in Vietnam

1. Transition from free and partially subsidized dominated condom approach to a **true TMA for populations affected by HIV**
2. Identify **commercially viable ways to reach key populations** with affordable and preferred condom brands
3. Support **rational commodity planning** by MoH and donors
  - Targeting subsidized condoms to those who need them most
4. Create **new and consistent users through demand generation** strategies and behavior change

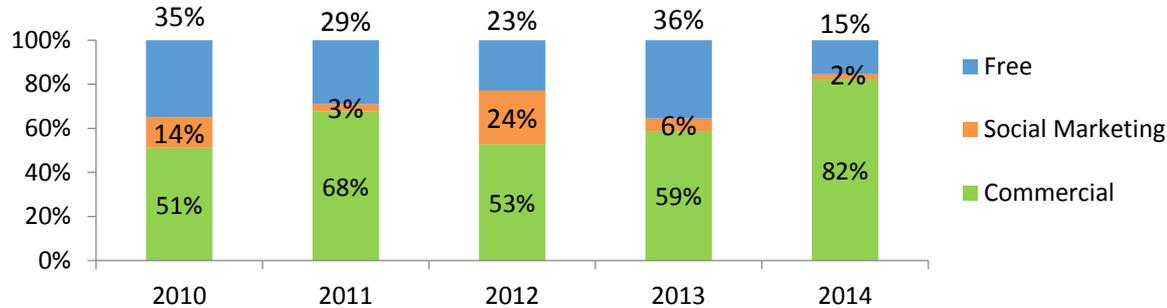


1. **Analyze policy enablers and barriers** related to condom market growth, regulation and management
2. **Measure condom volume, value and growth** and map existing distribution networks
3. **Segment consumers by condom use, preferences and willingness to pay**
4. **Partner with local condom commercial manufacturers** and distributors to brand and deliver quality affordable condoms to key populations
5. **Boost and sustain demand** for quality and affordable condoms
6. **Advocate for an improved regulatory environment** for condom quality assurance
7. **Support national and key provincial HIV leaders** to adopt TMA to plan and prioritize use of finite resources for those most in need

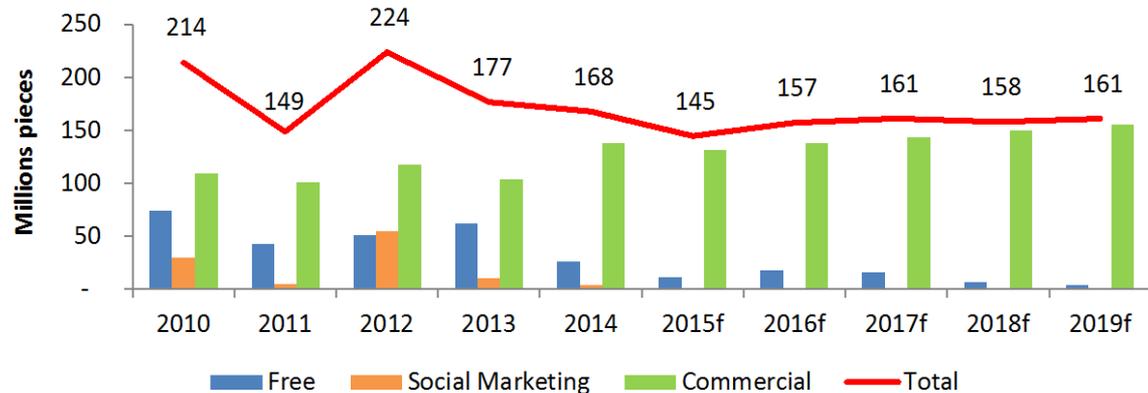


# Condom volume and growth

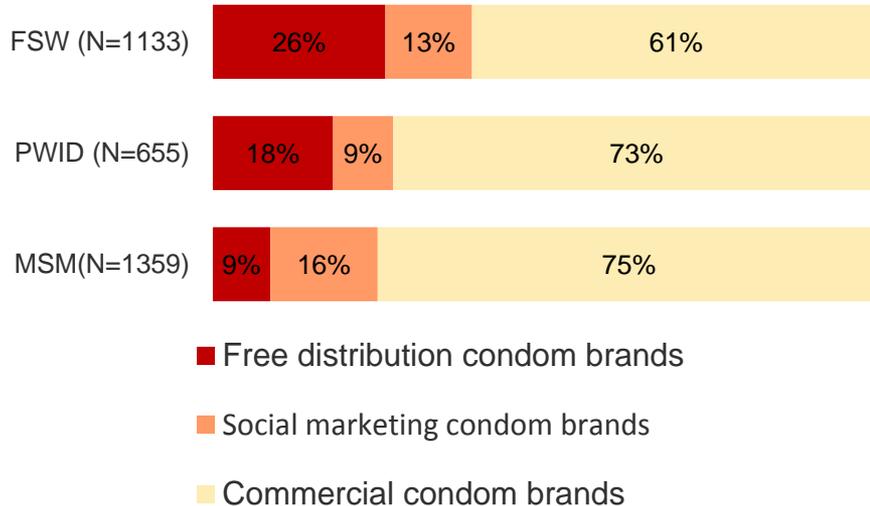
**Market size by sector (Volume)**



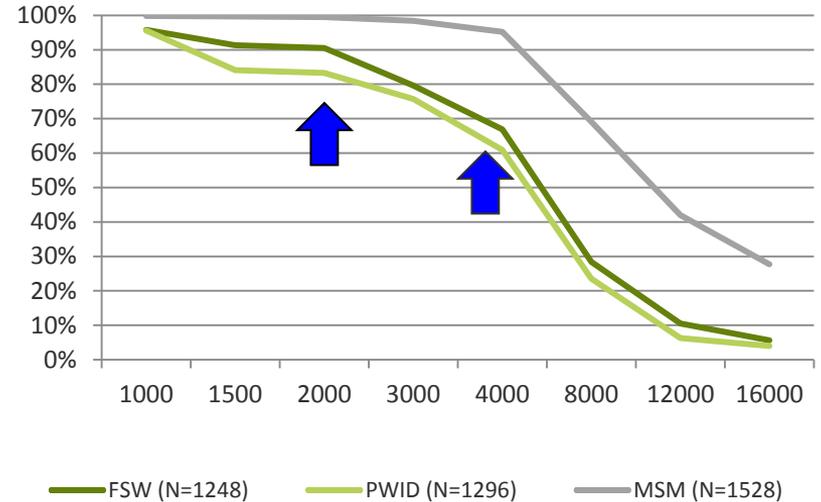
**Market forecasting**  
Total market volume  
for three condom  
sectors: 2015 – 2019



## Condom brands procured in past 3 months



## Willingness to pay: Price point for one condom





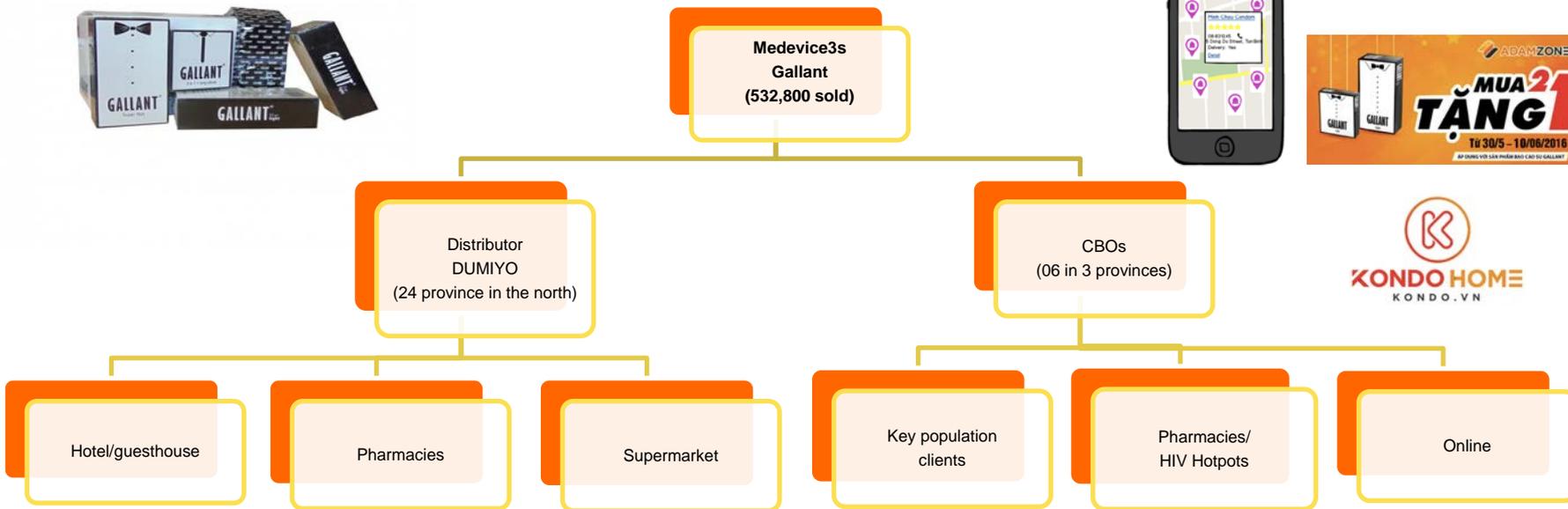
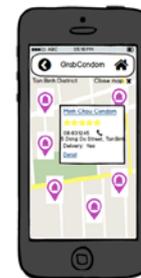
## Commercial brands for key populations and wider market



### Key Metrics

- 2 local manufacturers
- 4 brands, 2 launched
- **10 million** commercial condoms sold
- **92** large and sub-distributors

## Example: Gallant distribution system for KP and wider market





## Accelerating condom TMA in Vietnam

- **Seeding innovation** – Innovation Fund invested in creative, sustainable ideas across the distribution-retail value chain
- **Leverage** – Partnering with a wide range of private sector entities, engaging them through shared values (Eg MTV, manufacturers, social enterprise)
- **Quality** – Condom quality seal, partnership with anti-counterfeiting authorities, and consumers education



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- Market research partners: TNS, IPSOS
- Value chain: Medevice 3S, Dongkuk, OneTouch, Dumiyo, V-Smile, Hai Dang, G3VN, G-Link, DragonFroot
- Media: T&A Ogilvy, MTV, Yan TV, Nghe An TV

