



# Building a Healthy Condom Market: Institutionalizing the UNAIDS Condom Needs Estimation Tool (CNET) in Uganda



**Case Study**  
January 2024

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Utilizing the Condom Needs Estimation Tool (CNET) helps national programs to develop and implement robust, people-centered condom interventions<sup>1</sup>. The CNET is a condom quantification and programming tool that aggregates population specific condom use estimates to inform budgets for commodity procurement. Quantification is based on actual existing use, and incremental, realistic increases in targeted use. It's an important tool for implementing a total market approach (TMA)<sup>2</sup> as it incorporates into condom demand forecasting the potential contributions of the private (commercial) and social marketing sectors along with the public sector.

Uganda's application of the CNET in 2022 spurred the national program to rethink its assumptions around condom quantification and the respective roles of the public, social marketing, and private sectors. The process itself **engendered collaboration across sectors** as insights prompted an **evolved vision of a healthy condom market**, with the public sector assuming a progressively smaller role in volume contributions to the total market, creating opportunity for the private and social marketing sectors to play a larger role supporting sustainability and access. The insights gained from analysis of key and priority populations informed **more effective targeting of free condoms** to these groups. The CNET process also resulted in **improved resource planning**, with the outputs informing the development of a 3-year condom procurement plan which was embedded into the health sector 5-year medicines and supplies procurement and quantification plan and a robust Global Fund to Fight AIDS, Tuberculosis and Malaria (GFATM) application.

*This case study is part of a series documenting promising and best practices supported by the Global Fund to Fight AIDS, Tuberculosis and Malaria's (GFATM) Condom Strategic Initiative and wider condom programming. While every country and context are unique, our hope is that lessons identified in this work can be drawn on to inspire and inform programs in other countries.*

***This case study addresses the need to focus HIV prevention interventions and resources to those at highest risk of HIV, including Key Populations (KPs), as outlined in the UNAIDS [Technical Guidance](#).<sup>3</sup> It also highlights how to embed total market condom procurement and commodity management into government procurement processes for institutionalized and sustainable action.***

***The related case study highlighting Uganda's targeted condom last mile distribution through hotspot mapping links directly into this work.***

<sup>1</sup> [UNAIDS Condom Needs Estimation Tool](#)

<sup>2</sup> The Total Market Approach Condom Vision and Implementation Plan for Uganda: Financial Sustainability through a Multi-Sectoral and People Centered Approach to Condom Programming 2022-2026, Republic of Uganda Ministry of Health, UNAIDS and UNFPA

<sup>3</sup> UNAIDS 2020 Reference, [Developing Effective Condom Programs](#)

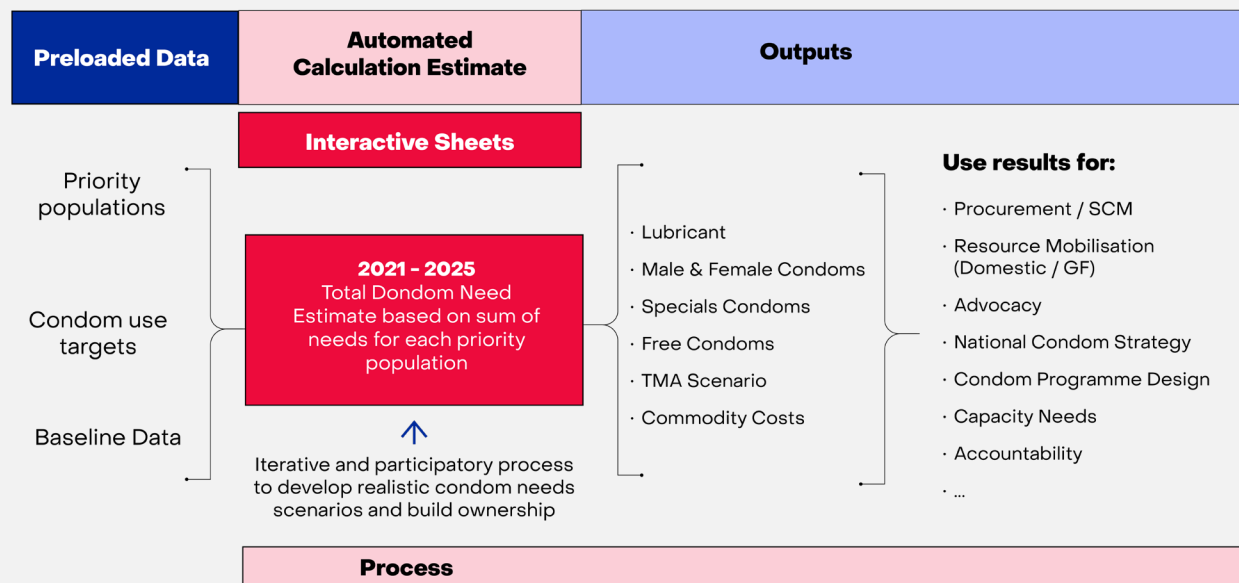


## Best and Promising Practices

# The Condom Needs Estimation Tool (CNET )

The CNET is designed to support condom planning and quantification, aid in the development of program strategy through creation of a vision for a healthy condom market, and serve as a tool for advocacy efforts with decision makers. The CNET is pre-loaded with a database that draws on national or regional proxy data for ease of use, although inputs can be modified to fine tune the model and address country or program specific contexts.

Figure 1. Components of the CNET <sup>4</sup>



TMA=Total Market Approach; SCM=Supply Chain Management; GF=Global Fund

## Context

Uganda's condom market has been impacted by declining funds supporting condom social marketing (CSM) programs, which had historically played a significant role in the supply and demand for condoms nationwide. Well-funded social marketing programs managed by PACE, DKT, MSI Uganda and Uganda Health Marketing Group supported distribution and behavior change interventions and promoted broad access.<sup>5</sup>

Social marketing programs in Uganda helped "normalize condoms for much of the population, increase demand for and availability of condoms through a range of accessible outlets, and paved the way for the expansion of the commercial sector." This scenario changed with the decline in funding for social marketing programs, leading to a higher proportion of free condoms in the market.

<sup>4</sup> Condom Estimations: From Commodities To A People Lens - The Condom Needs Estimation Tool (CNET) For People Centred Condom Programs: A User Guide, 2023

<sup>5</sup> Brian Smith, Chastain Mann, Chris Jones, Nora Miller, Kim Longfield, Steve Gesuale; Challenges and recommendations for reaching "Fast-Track" targets for condom use, 2016

As the contribution of socially marketed condoms declined, the national program allocated funding to fill the gap with free distribution. Meanwhile, declining funds for demand creation supported by social marketing organizations negatively impacted demand for condoms across all sectors. Quantification and procurement in the absence of demand creation, along with incorrect assumptions around consistency of use due to lack of robust data, and a weak free-to-user condom last mile distribution structure that created stock-outs in community outlets, together resulted in high levels of over-supply at the national warehouses. In the absence of reliable and consistent condom supply to the last mile and sustained demand creation, partners were unable to plan effectively for free distribution. Unpredictable public supply and periodic flooding of the market also negatively impacted the willingness and ability of both social marketers facing funding cuts and commercial companies to invest in sustainable, commercial brands.

## Utilizing CNET to support a Total Market Approach

Uganda’s Ministry of Health (MOH) leveraged the CNET to bring strategic alignment required of **a total market approach, a key element of the National Comprehensive Condom Programming Strategy & Implementation Plan 2020-2025**.<sup>6</sup> Previously applied by the Condom Working Group as a one off process, the Ministry of Health Medicines and Supplies Department working with the HIV/AIDS and Reproductive Health departments embraced the CNET in 2022 for institutionalized procurement planning for all sectors. The CNET supported an objective of **more targeted, efficient public sector distribution** that reaches those in need of free condoms. That process included understanding holistic condom needs in relation to demand, quantification and procurement, the contribution of each sector, and market segmentation to map those in greatest need of free condoms and how best to reach them.

The CNET process was important for Uganda to ‘right size’ the role of free public sector condoms, factoring in the role of declining funding for social marketing while also trying to facilitate growth of socially marketed and private sector condoms—in part through improved targeting of free condoms to those most vulnerable to HIV, or those unable to pay. This vision for a healthy market included growth of consistent use across all populations while decreasing reliance on external funding and subsidy. The institutionalization of the CNET helped to inspire the creation of the TMA taskforce to lead the ongoing advocacy for actions that would help shift the market away from a predominance of free to user condoms, as targeted in the National Condom Strategy.

<sup>6</sup> [National Comprehensive Condom Programming Strategy & Implementation Plan 2020-2025](#), Uganda Ministry of Health, 2020

<sup>7</sup> [Condom Estimations: From Commodities To A People Lens - The Condom Needs Estimation Tool \(CNET\) For People Centred Condom Programs: A User Guide](#), UNAIDS, 2023

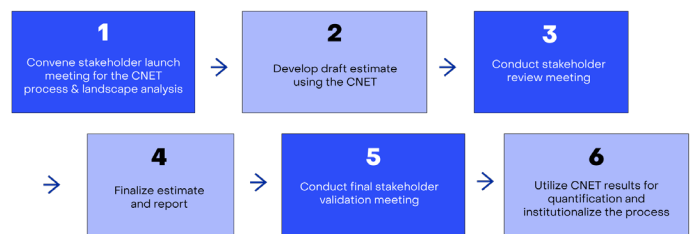
“The MOH is excited about it (CNET). We felt good about the tool and adapted assumptions and therefore our quantifications. It helps you to know where to focus on different groups, that was coming out clearly.”

-MOH Stakeholder

## Implementing the CNET Tool in Uganda

The Uganda MOH Department of Pharmaceuticals and Natural Medicines led a highly participatory process with range of stakeholders to ensure buy-in and ownership of the tool and its outputs, build capacity, and integrate a variety of perspectives into the process. The process aimed to improve the quality of data used in calculating outputs, the decisions the analysis informed, and follow on application of those findings in program implementation. That process loosely followed the roadmap outlined in the CNET User’s Guide and below.

Figure 2. Roadmap to implement the CNET process <sup>7</sup>



The CNET tool was introduced to the MOH through orientation sessions organized by UNFPA and UNAIDS. The Quantification and Procurement Planning Unit (QPPU) led the initiative, with inputs from the Condom Coordination Unit of the AIDS Control Program, the AIDS Commission, Reproductive Health Commodity Security, Reproductive and Infant Health Division, National Warehouses, UN agencies, implementing partners, and social marketing organizations. Local facilitators were trained by UNFPA/UNAIDS on the use of the tool, then led a multi-sector learning workshop to generate condom quantification estimates for key and priority populations. Ongoing investments by UNFPA helped to support a smooth quantification process.

# Impact of Utilizing and Embedding CNET

## Sharper insights into procurement needs for specific populations:

Through CNET, Uganda identified that condom needs were driven by fishing communities (20%), sex workers and their clients (19%), and people with non-regular partners (29%), most of whom are adolescents and young people. Key Population (KP) organizations were involved in the process, whose participation was critical to understand the unique needs of their representative populations.

## Improved targeting of distribution:

The insights from CNET prompted Uganda to adapt its existing Alternative Distribution Mechanism to better target key populations by geographic information system (GIS) mapping of hotspots where these populations frequent, involving KP groups in the process.

## Supporting the vision for a healthy condom market:

Uganda’s use of CNET was driven by the National Condom Strategy and its vision to improve the condom market, embrace TMA and improve the accuracy of condom quantification. **Use of the latest data from the private sector confirmed that free condom distribution dominated the total market with 95% share, much larger than the previous estimate of 80% at the time of the national strategy.**

The CNET led to the national program rethinking its assumptions around condom quantification and the respective roles of the public, social marketing, and private sectors. It also led to a **more detailed disaggregation of condoms needed by different population categories.** Insights gleaned from the data demonstrated how the public sector could assume a smaller role in the total market, creating opportunity for the private and social marketing sectors to increase their role to reach those that can afford to pay for condoms. The recently registered Commercial Medical Stores (CMS) is convening all condom private sector partners to help achieve this objective. CNET data and the associated review and planning processes helped map the transition from a market dominated by free condoms to one that more appropriately supports TMA as shown in Figure 3.

The proportion of the market free condoms represents significantly decreases from 95% to 75%, although actual quantity of free condoms estimated to be procured increases from 272 million in 2022 to 353 million condoms in the 2027 projection (see Figure 4). The target of 65% for the public sector by 2025 was adjusted upwards given the new higher estimate for the current public sector share. While the public sector proportion is projected to decrease, the private sector and social marketing proportions will both increase. Condom procurement forecasts are based on realistic, anticipated increases in use and need by a growing population that uses existing use as a foundation to estimate future use.

Funding to re-energize sustainable social marketing has been included in the Global Fund Round 7 proposal (GC7), while there is ongoing advocacy to reinstate funding for sustainable social enterprise approaches through other donors. In the meantime, social marketing organizations are selling condoms at cost-recovery prices which gets captured under the private sector, and quantification assumptions will be reviewed on an annual basis to assess the situation in each sector and adjust projections accordingly.

Figure 3. Current and projected condom distribution by sector<sup>8</sup>

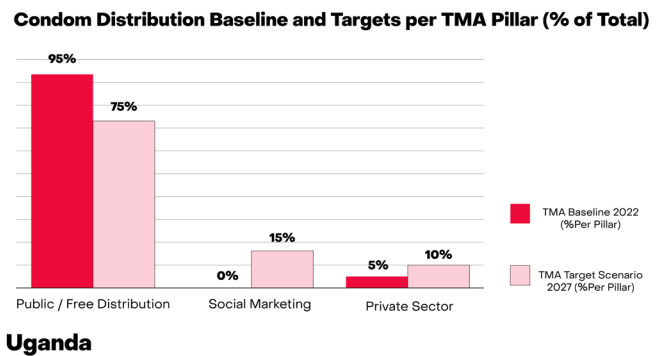
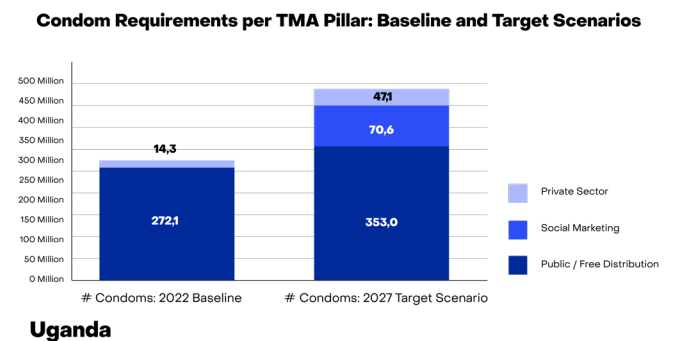


Figure 4. Current and projected condom requirements by sector (in millions)<sup>9</sup>



<sup>8</sup> Uganda Condom Needs Estimation Tool CNET V5.0 2023-2027 – 21 February 2023.

<sup>9</sup> Ibid.

## Private sector engagement and action:

The involvement of commercial sector representatives in the quantification process was key and resulted in the design of interventions to tackle constraints inhibiting the commercial market, such as fast-tracking post shipment testing of condoms. In a promising practice, one of the commercial sector representatives, the Commercial Medical Stores, now permanently sits on the Total Market Approach (TMA) task force of the national condom program and has mobilized commercial sector partners to establish a joint physical warehouse, establish distribution routes for 23 commercial sector condoms to private drug outlets, and establish digital tracking tools for distribution. These efforts aim to expand the private sector condom market share.

## Establishment of a 3-year commodity procurement plan:

Central to the use of CNET is the generation of annual condom requirements for the years 2023-2027<sup>10</sup>, which was used to develop a 3-year commodity procurement plan with actual procurement based on residual stock and capacity, storage, and distribution. CNET results have been embedded into the 2023-2027 National Quantification Plan.

## Improved resource planning:

The use of CNET and its outputs strengthened Uganda's Global Fund GC7 application by improving the accuracy of total and population specific condom needs driving procurement. The tool was adjusted to reflect Uganda's contexts, but once done, stakeholders found the tool easy to use. Improved budgeting was also supported as UNFPA pricing data is included as a component of the tool.

## Strengthened capacity in the CNET process:

Uganda now has a team capable of running the CNET process and available to support other countries, which it has already done for Malawi and Lesotho.

## Key Learnings

### **Program leadership and coordination was essential in bringing together the right stakeholders and engaging them around a vision of a healthy condom market:**

The MOH, supported by UNFPA and UNAIDS, leveraged the existing Condom Working Group and ensured that a broad range of stakeholders from the public, social marketing and private sectors were involved and called

upon to act.

### **The CNET process and outcomes increased transparency and laid the groundwork for successful TMA strengthening, with strong engagement of the private sector:**

The process of carefully reviewing assumptions and involving KP groups increased their ownership of forecasts and meeting targets, while engendering more confidence amongst donors in the entire quantification process. The perspective that CNET was able to provide led to the creation of the TMA task force. Without CNET, there would not have been the visibility on the key issues for the TMA WG to advocate, nor the ability to forecast the shift towards a healthier condom market. Involving the private sector through the CNET process also showed the potential for expanding the role of the private condom sector and galvanized action on joint warehousing and distribution.

### **For sustainability, CNET needs to be linked to condom strategy and resource requests:**

Linking the CNET process to the national condom strategy, quantification processes, and the GFATM application, ensured the tool was embedded into longer term processes. The Uganda MOH plans to utilize CNET every year for quantification and to inform resource requests with all donors, with continuing coordination with the social marketing and private sectors to ensure a healthy condom market.



<sup>10</sup> Uganda Condom Needs Estimation Tool CNET V5.0 2023-2027 – 21 February 2023

## Tools and Resources

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- [UNAIDS Condom Needs Estimation Tool](#).
- Capacity Building for the Condom Needs Estimation Tool (CNET)– Uganda, Ministry of Health/UNFPA, 2023.
- [Condom Estimations: From Commodities To A People Lens: The Condom Needs Estimation Tool \(CNET\) for People Centred Condom Programs: A User Guide](#), UNAIDS, 2023.
- [National Comprehensive Condom Programming Strategy & Implementation Plan 2020 – 2025](#).
- The Total Market Approach Condom Vision and Implementation Plan for Uganda: Financial Sustainability through a Multi-Sectoral and People Centered Approach to Condom Programming 2022-2026, Republic of Uganda Ministry of Health, UNAIDS and UNFPA.

## Suggested Citation

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