



Mann Global Health

Total Market Approach Playbook for Sustainable Condom Access

Guidance supporting national programmes toward healthy, sustainable condom markets

A Guide to Condom Market Landscape Analysis

February 2026



Purpose of this Playbook

This playbook introduces **total market approach (TMA)** concepts in simple, practical terms. It focuses on **actionable steps** that national programmes can apply to ensure TMA strategies are operational, helping countries stabilise condom markets, target finite resources, and ensure sustainable access to condoms in the context of declining donor funding. Approaches were developed to support country-specific market transitions toward sustainability, informed by lessons learned from successful transitions, particularly in Asia. **Three tangible actions** and supportive activities help countries design interventions to ensure strategy translates to interventions achieving sustainable condom markets.

A TMA can lead to a healthier, more resilient ecosystem supporting condom delivery. Sectors share responsibility for condom access, lowering reliance on unpredictable (and decreasing) donor funding. Done successfully, a TMA can result in:

- **Efficiency**
A TMA reduces pressure on public sector procurement as the sold market expands, freeing scarce public funds for critical functions, such as last-mile distribution, demand generation, and stewardship.
- **Equity**
By targeting free condoms to populations who cannot pay and are most at-risk, while enabling actors in the sold market to serve those who can pay, a TMA can ensure fair and equitable access across the market.
- **Sustainability**
Even under funding constraints, a TMA can sustain, or even increase, condom use by reducing wastage, improving responsiveness to user needs, and decreasing reliance on unpredictable donor funding.

TMA Success Story: Kenya

Kenya illustrates how the sold market can respond when public sector distribution weakens. The sold market (commercial and social marketing organization [SMO] sales) have grown by **~25% since 2019** and over **60% in the last decade**. As public sector procurement and distribution suffered from stock outs and funding delays, competition among the sold market has expanded choice and reach, and enables consistent access. While continued investment in demand generation is still needed to grow condom use, Kenya's experience demonstrates that a healthy sold market can effectively absorb demand and maintain access when free condoms decline—complementing public distribution to meet the needs of the broader population.



Why a TMA Now?

TMA has been discussed as a concept for decades, but the current funding crisis creates urgency to translate concepts into action. Across many countries, condom programmes are under pressure.

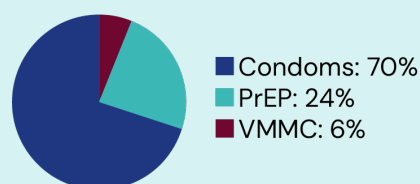
- **Condom use is declining**, especially among youth and women, with worrisome trends in higher risk partnerships.
- **Donor procurement is declining**, creating growing supply gaps and increased supply volatility.
- **Public sector supply chains are inconsistent**, with stockouts at some distribution points and oversupply at others; last-mile distribution is struggling, limiting coverage at non-traditional outlets.
- **Social marketing programmes can no longer sustain demand generation and product availability** following the withdrawal of donor investments, with the greatest impact among youth with limited exposure to condom marketing.

The Case for the Condom

Condoms remain one of the most effective, lowest-cost HIV prevention tools in the efforts to address HIV. This is especially true for populations at moderate risk, which in many countries represent a large share of sexually active adults. As one of the first multi-use technologies, condoms also prevent sexually transmitted infections (STIs) and unwanted pregnancy. Updated modeling from Avenir Health brings the evidence to justify continued investments in condoms:

- **They work.** Modeling demonstrates the disproportionate role of condoms in averting new infections. This chart highlights how **condoms are preventing nearly 3 in 4 new infections of primary prevention activities (excluding treatment as prevention)** in Kenya, assuming treatment programmes continue with current coverage.
- They are **cost effective**. An analysis in 14 African countries found that condoms are the single most cost-effective intervention in the prevention toolkit in 11 of those countries. This cost-effectiveness is critical in today's resource-constrained environment
- They are a **proven best buy in HIV prevention**. Using Kenya as an example, condom supply and promotion are cost-saving when the treatment costs of averted infections are included, making condoms a best buy among all HIV prevention interventions.

Kenya: The Role of Condoms in HIV Infections Averted



Data from Avenir Health updated modeling conducted in 2025 and 2026 (unpublished).

Stepping Back: What is a TMA?

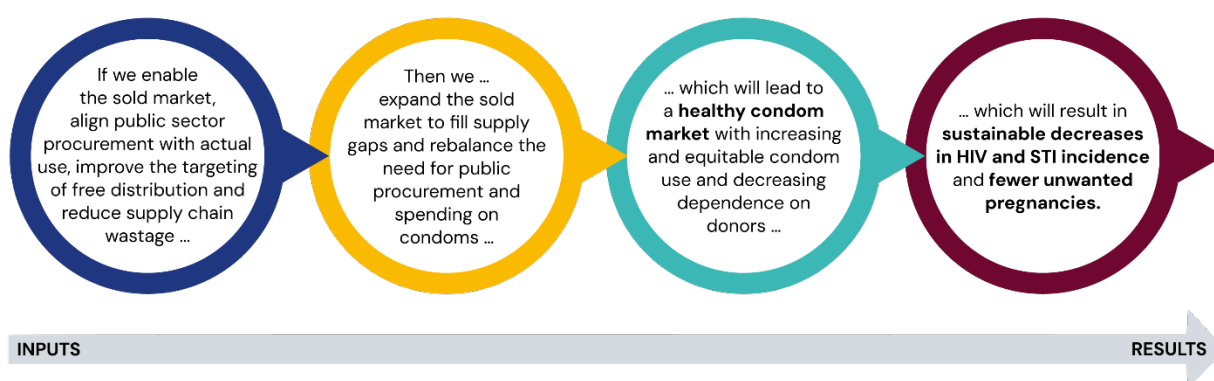
A TMA helps countries leverage the public and sold markets in a coordinated manner so that those who cannot pay continue to receive free condoms, while those who can pay are offered sustainable brands by the sold market. A key challenge to building sustainable condom markets is the **unintended crowding out of the sold market by excess free distribution**. Addressing this requires creating clearer space through better alignment of public sector procurement with actual use supported by targeted distribution.

A healthy, sustainable market is one that grows equitable use, while decreasing reliance on external (donor) subsidy.

Throughout this playbook, the **sold market** is used to describe social marketing, social business, and commercial condom brands, recognising their common role in meeting demand through channels where condoms are sold.

A TMA can be a pragmatic and practical planning and coordination approach to ensure the entire condom market, including free distribution and the sold market, works together to efficiently and sustainably meet population needs. TMA is **not a replacement for free condoms**, nor should it neglect needs of low-income populations at highest risk of HIV. Instead, it ensures that subsidies are targeted while the sold market grows to fill predictable gaps.

The graphic below illustrates how strengthening the sold market, aligning public sector procurement with actual use, and improving targeting and efficiency can rebalance the condom market in support of reduced HIV incidence. As the sold market fills supply gaps, and the public sector focuses on those who truly need free condoms, the market becomes healthier, more equitable, and less donor dependent. Ultimately, these shifts lead to sustained reductions in HIV and STI incidence and fewer unintended pregnancies.



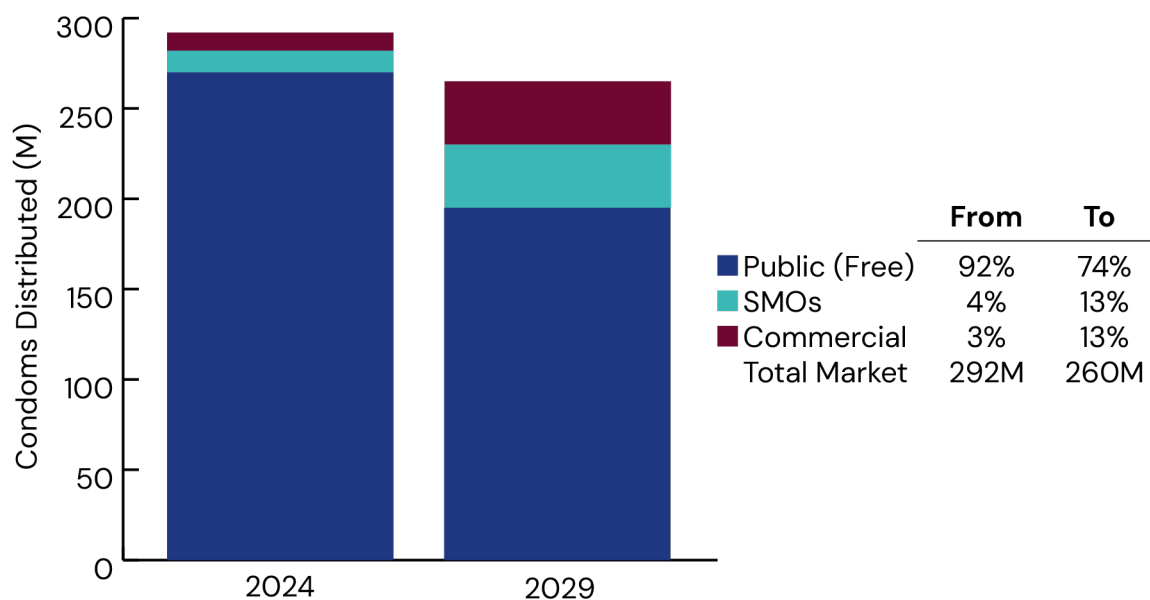
The graphic below illustrates how a healthier market mix can maintain condom use, even as public sector distribution decreases. The scenario is hypothetical, informed by actual data from an East African market and lessons from Asian condom markets that have successfully implemented a TMA. Tangible, positive outcomes are achieved by:

- Improved targeting of free distribution,
- Reduced wastage from expiring stocks in over-supplied facilities, and
- Allowing the sold market to play a larger role.

In this example, modest but steady increases in the sold market meet the needs of populations that can afford to pay for condoms, while improved targeting and better management of free distribution preserves equitable access for the poor and vulnerable. Cost savings of potentially millions of dollars from a medium-sized market can then be directed to support critical functions like last-mile distribution, demand generation, or stewardship activities.

Wastage plays a significant role in condom supply inefficiencies. Public sector wastage is sometimes estimated to reach up to **25%**, often due to the absence of Management Information System tracking and misaligned supply at certain facilities. In this scenario, **the 9% reduction in total volumes reflects the reduction of unnecessary wastage rather than reduced access.**

A Vision for a Healthier Market



Importance of Coordination in a TMA

To ensure a coordinated, timely implementation to this approach, countries should establish a small and efficient working group or task force to guide the process and maintain momentum across stakeholders. This working group is typically led by the Ministry of Health or National AIDS Council and should include representatives from the National HIV Prevention Programme, quantification and forecasting teams, medical stores and supply chain management, and the social marketing and commercial sectors to ensure whole-market alignment. The task force's role is to set timelines, coordinate data inputs, develop a common vision for a sustainable condom market, oversee planning and procurement decisions, and ensure that both public and sold market actors are engaged in a coherent strategy. By convening the right actors consistently, the group strengthens stewardship and creates the operational backbone required to implement a TMA effectively.

[A Generic ToR can be found as an annex to this document](#)

Three Fundamental Actions Underpinning a TMA

Many countries have a TMA strategy, plan, or guidance, but struggle to translate it into actionable interventions. The three concrete actions outlined below help countries operationalise a TMA and move from strategy to implementation.



ACTION 1: KNOW YOUR MARKET

Understand condom use trends, supply volumes, stockouts, and willingness to pay across sectors. Identify major constraints preventing the market from reaching full potential.



ACTION 2: CREATE A VISION FOR A HEALTHY MARKET

Define what a sustainable market should look like: the role of each sector, who each sector serves, how to target free condoms, and how much demand can be met by free versus sold supply.



ACTION 3: ENGAGE & ENABLE THE COMMERCIAL SECTOR

Create opportunity and the predictable space that the sold market requires to give them confidence to invest in the market and expand their reach.



ACTION 1: Know Your Market

A market landscaping analysis that describes how the condom market functions across the public, social marketing (where present), and commercial sectors is a critical first step in implementing a TMA. The analysis should identify what is working, where constraints exist, and the implications for TMA-aligned programming—particularly by clarifying current and future supply gaps and informing strategies to support a sustainable market.

Countries Do Not Need Perfect Data to Support a Market Analysis

A focused understanding of condom use trends, supply sources, and sector-specific barriers is sufficient to guide practical action. Start with the data available now and refine it as additional insights are collected.

The market landscaping can be organised around four core analytical components.

1. **Users and Use Trends:** understanding who is using condoms, where use is declining or stagnating, and how access, preferences, and behaviours differ across populations.
2. **Market Size, Segmentation, and Structure:** estimating the size and composition of the total market (public, social marketing, and commercial), identifying which segments can transition to the sold market, and assessing future supply risks.
3. **Public Sector Condom Supply Chain Assessment:** diagnosing how free condoms are planned, procured, stored, and distributed, including governance, financing, data systems, and sources of inefficiency such as stockouts or wastage.
4. **Sold Market Condom Supply Chain Analysis:** assessing the presence, incentives, constraints, and growth potential of social marketing, social business, and commercial actors across importation, distribution, retail, pricing, and demand generation.

Why It Matters

These components provide the evidence base needed to clarify roles across sectors, target subsidies more effectively, engage the sold market with confidence, and design realistic interventions that support a sustainable TMA.

Tools

The [Condom Market Landscaping Guidance](#) complements this playbook by providing a structured, practical approach to understanding market dynamics, identifying supply risks and opportunities, and informing TMA-aligned planning and procurement decisions.

The accompanying [Data Collection Workbook](#) provides practical templates and prompts to support this analysis, helping teams compile existing data, identify gaps, and prioritise insights that are most relevant for action.

ACTION 2: Create a Vision for a Sustainable Condom Market

A vision for a healthy condom market is simply a clear picture of **what a sustainable future looks like** and **who does what** to get there. It should be short, practical, and easy for all partners to align behind. It can guide national budgeting efforts, inform public sector procurement planning, and communicate growth opportunities to the sold market.

A healthy condom market is one that increases use while reducing reliance on external subsidy. This is achieved when each sector plays to its strengths: free distribution is consistent and well targeted, and the sold market is able to invest in serving populations that can afford to pay and value choice. Together, these dynamics create a more resilient and sustainable system for condom access.

Why It Matters

A vision for a healthy market is especially useful for informing quantification to support free distribution. Over-procurement of condoms and poorly targeted distribution can inadvertently crowd out the sold market from providing low-cost condoms to populations that can afford to pay, particularly when free condoms “leak” or make their way into the sold market. Rebalancing supply to better leverage the sustainable commercial and social business sectors is an important component of supporting a sustainable market.

A Vision for a Healthy Market Should Answer These Five Questions

1. What is the appropriate role for each sector to sustain condom use?

- Free condoms should reliably reach people who are unable to pay and certain populations at highest risk that can be reliably supplied by public distribution. Which populations can the national programme specifically and realistically target for free distribution?
- A growing sold market (social marketing, social business, commercial) serves those who are unable to pay. Engagement with the sold market can help understand potential, particularly if populations that can afford to pay for condoms shift to brands available at retail outlets.
- Across populations, it is important that users have choice, access, and quality condoms that address their needs.

Why It Matters Defining sector roles ensures subsidy is targeted, the sold market can grow responsibly, and users retain access to quality and choice. Clear role alignment reduces inefficiencies and strengthens long-term market sustainability.

2. How do we segment the market?

Segmentation matches groups of people who have similar needs, risk profiles, and ability to pay to condoms distributed by either the public or sold sectors, ensuring that all populations have access to products that meet their needs. It draws heavily on outcomes described in the step above.

Why It Matters

Segmentation ensures that free condoms reach those who need them most, while the sold market grows to meet demand among those who can pay. This keeps the overall market healthy, reduces pressure on public budgets, and expands access and choice for all users.

Market Segmentation Fundamentals

While sophisticated segmentation using advanced marketing techniques is possible, a simple approach grounded in HIV risk and ability to pay is often sufficient to guide effective targeting of condoms.

Public Sector (Free Condoms)

Target Populations: People at highest risk of HIV such as **sex workers, men who have sex with men, and those who struggle to pay**, including low income and rural populations.

Channels: Clinics, drop-in centres, community outreach, peer networks, non-traditional points that reach specific key populations.

Sold Market

Target Populations: People who can pay for affordable condoms. This is typically **urban men and women, young adults with income, moderately at-risk populations, and users who prefer specific features, flavours, textures, or premium brands.**

Channels: Pharmacies, shops, supermarkets, kiosks, bars, nightclubs, hotels, guesthouses, e-commerce platforms, informal retailers.

3. Who does what?

- **Public Sector:** coordinates efforts supporting the entire market, such as demand generation; procures and targets free supply (from procurement to distribution) for specific populations.
- **Sold Market (Commercial Sector, Social Marketing Social Business):** markets condom brands, distributes to viable outlets, and grows choice for those who can afford to pay.

Why It Matters

Delineating clear roles for each sector can ensure each sector is applying its relative strength in sustainably meeting the needs of an entire population.

4. How to quantify condom demand to inform public sector procurement, and communicate opportunity to commercial actors?

- The Condom Needs Estimation Tool (CNET) helps national programmes quantify procurement based on **actual demand**, set **realistic targets**, and then set targets for supply across the public and sold markets. This results in fewer stockouts, less wastage, and a healthier, more sustainable condom market.
- Free public sector condom quantification should be based on population size, estimated use, and data across delivery channels, including contributions from the commercial sector.

Why It Matters

Quantifying condom demand based on **estimates of actual use**, rather than historical procurement or need based on unrealistic targets helps ensure that limited public resources are used efficiently and reach those who need them most. When public sector procurement reflects actual demand (use) and accounts for the role of the sold market, countries can reduce stockouts and wastage while creating clearer, more credible signals for commercial actors to invest and expand. This alignment is essential to stabilising supply, sustaining access, and building a healthier, more sustainable condom market. **Many countries over-estimate condom needs by basing procurement on inflated historical budgets or aspirational, unrealistic use targets.** This can lead to commodity expiry and divert resources from critical programme elements such as demand generation and lat-mile distribution.

Leveraging the CNET to support TMA

The CNET is a simple, data-driven tool that helps countries estimate how many condoms are needed based on **known sexual behaviour, condom use, and demographics**, rather than procurement history or budget ceilings. It shifts quantification from “How many did we buy last year?” to **“How many are really needed for protection?”**

The CNET provides:

- **Population-specific estimates** using country demographics, DHS/IBBS data, and default sexual activity assumptions.
- **Baseline use versus availability comparisons** that show whether supply matches real use (e.g., oversupply leading to wastage; undersupply leading to unmet need).
- **5-year target scenarios** that help national programmes set feasible goals (not inflated ones) for each population segment.
- **A total market view**, including how much demand can be met by the public sector versus the sold market.

When using the CNET within a TMA, it is important to start with populations sizes and estimates of actual use, not aspirational supply. Existing condom-use baselines are used to calculate demand based on actual behaviours. This avoids chronic over-procurement that can lead to wastage, distort the market and crowd out the sold sector. The CNET can help to reduce public sector oversupply in urban and peri-urban areas and creates space for commercial brands, which is critical under declining donor funding.

5. What should change in the next 3–5 years?

Transitioning from a donor-driven, free distribution market to a balanced, sustainable market with a growing role for the sold market takes time. Over time, programmes should be able to ensure that:

- Free condoms are targeted only to those who truly need them.
- Social marketing organisations/social businesses progress toward cost recovery (if they have not already).
- Commercial presence expands in urban and peri-urban areas.

Why It Matters

Transitioning to a balanced market takes time and requires deliberate, phased change. By clarifying how roles should evolve over the next 3–5 years countries can move toward sustainability without disrupting access for priority populations. This forward-looking view helps align planning, procurement, and investment decisions around a shared, realistic goal.

Tools

Both tools are available free online. Access the [CNET](#) and [guidance](#) documents.



ACTION 3: Engage and Enable the Commercial Sector

A sustainable condom market requires commercial participation. Despite real challenges, the outlook for commercial condom expansion is positive in low- and middle-income countries. Market size and value are growing, unmet need remains substantial, and many users are already paying, or are willing to pay, for condoms, creating clear space for commercial brands to expand. Most markets already have a number of quality, affordable, and attractively branded condoms. While constraints related to regulation, financing, coordination, and distortive subsidy must be addressed, the increasing traction of TMA, the transition of social marketing brands toward sustainable models, and growing brand diversity signal that with targeted reforms and engagement, commercial actors can play a much larger role in sustaining access and use.

TMA Success Story: Vietnam

Vietnam demonstrates how a declining supply of free and subsidised condoms can catalyse rapid growth in the commercial market when a TMA is applied. As donor-funded condoms receded, commercial brands expanded to make up **over 90% of the total market**, supported by improved and favorable regulation, targeted demand generation, and investment from local manufacturers. This shift shows that a well-facilitated sold market can sustain access for key populations, reduce reliance on external funding, and drive long-term market health and resilience.

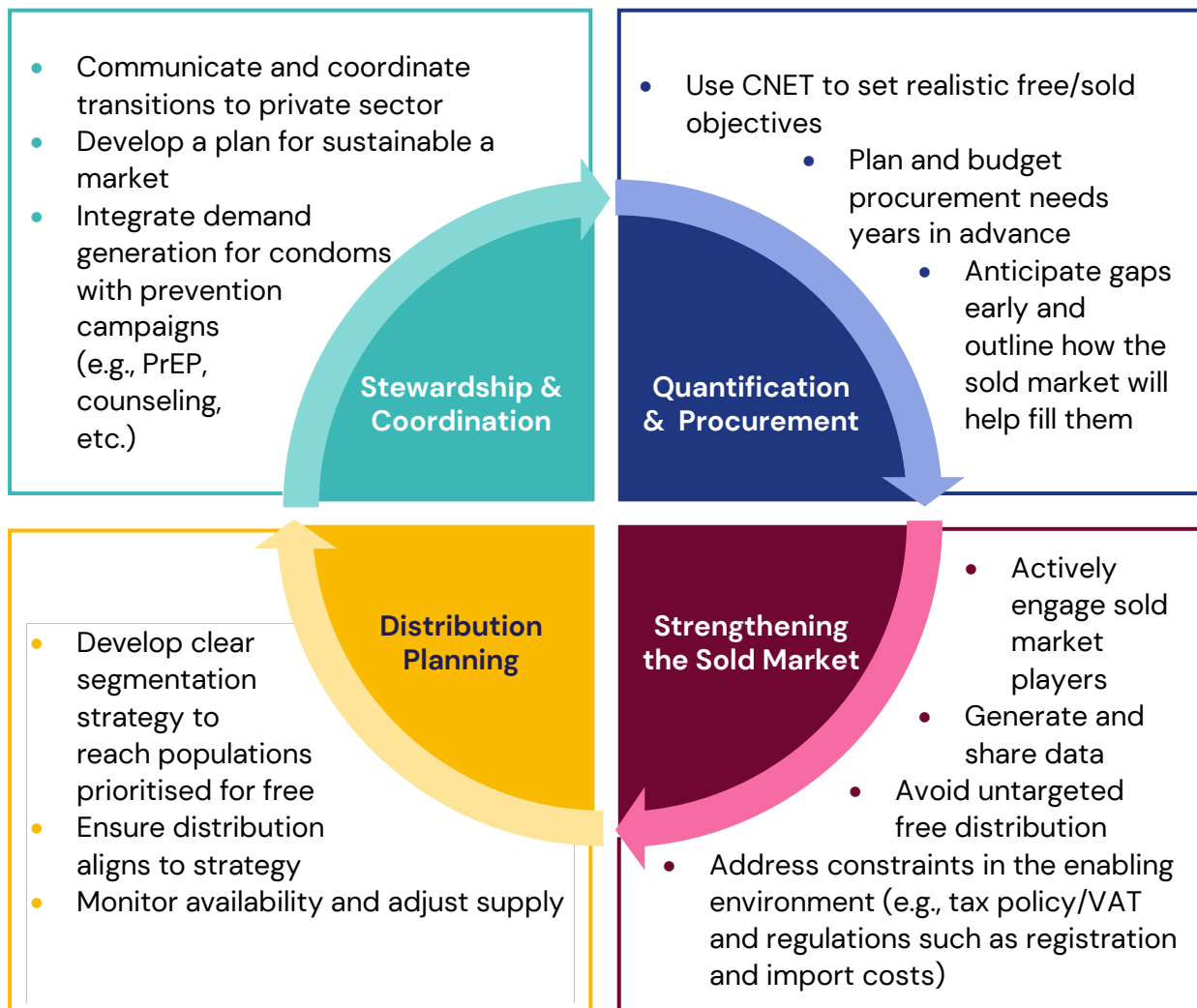
What Countries Can Do

1. **Create space for the sold market** by addressing the over-supply of free condoms that can inhibit commercial sector participation. Demand-based quantification and clear procurement forecasts can help communicate realistic opportunities for sold market growth.
2. **Address regulatory and fiscal barriers** (e.g., registration, VAT, quality standards) that inhibit the commercial sector from doing more.
3. **Engage commercial actors in actionable working streams** and produce and share market and user data to understand market potential and inform commercial strategies.
4. **Coordinate investments that benefit both sectors.** Category promotion can generate demand for all brands. A [social media demand guide](#) generated by FHI 360 leads teams through a step-by-step process to prioritise and plan, create and implement, and monitor and adjust a cost-effective social media campaign that has potential to increase investments in demand for any condoms.



Sub-Tasks Supporting a TMA

The graphic below summarises the core functions that underpin an operational model for a TMA. It shows how stewardship, quantification, distribution planning, and strengthening the sold market work together to translate the guidance in this document into coordinated, data-driven action.



What Success Looks like in 12–24 Months

Success should be measured with indicators that are meaningful, achievable, and grounded in real market conditions. The following measures help teams monitor whether stewardship, supply, demand, and the sold market are strengthening as intended.

Stewardship	Supply	Demand	Market Sustainability
<ul style="list-style-type: none"> • Functional technical working group coordinating and communicating the roles of public sector and actors in the sold market • Updated CNET that reflects procurement volumes driven by actual projected use and role of sold market • Operational plan integrating TMA in action 	<ul style="list-style-type: none"> • Reduced volatility in free supply through agreed longterm procurement plan • Fewer stockouts in priority outlets for free • Better targeting of free supply to those who are unable to pay 	<ul style="list-style-type: none"> • Segment-specific messaging for youth, key populations, and other groups • Increased visibility of quality commercial brands 	<ul style="list-style-type: none"> • Increased share of sold condoms • Number of active, quality, affordable commercial brands expanding reach • Social marketing organisations progressing on transition roadmaps to cost-recovery



Key Terms

- **Condom Needs Estimation Tool (CNET):** A data-driven tool used to estimate condom demand based on population size and actual use, rather than historical procurement. It helps set realistic targets for free and sold supply.
- **Demand-Based Quantification:** An approach to planning procurement that starts with estimates of actual condom use, not past distribution volumes or aspirational targets.
- **Enabling Environment:** Policies, regulations, financing conditions, and systems (e.g., VAT, registration, import rules) that impact how free public distribution, as well as the sold market, can serve user needs.
- **Healthy / Sustainable Condom Market:** A market that maintains or grows equitable condom use, while reducing reliance on external donor funding over time.
- **Market Segmentation:** A practical way of deciding who should be targeted with free condoms and which population can be served by the sold market.
- **Non-Traditional Outlets:** Retail or distribution points outside clinics and pharmacies (e.g., bars, guesthouses, kiosks, entertainment venues).
- **Public Sector (Free Distribution):** Government-funded or donor-funded condoms provided at no cost, intended primarily for populations at highest risk and those unable to pay.
- **Social Business:** Mission-driven enterprises that sell condoms with the goal of covering all costs over time rather than relying indefinitely on subsidy.
- **Social Marketing:** Subsidised condom programmes that use commercial marketing techniques to increase use, often priced below full cost.
- **Sold Market:** A collective term used to describe social marketing, social business, and purely commercial condom brands, all of which require users to pay at least some amount and operate through market-based channels.
- **Stewardship:** The government's role in setting programme strategy and direction, coordinating actors, using data, and ensuring accountability across all players in the entire condom market.
- **Supply Gap:** The difference between condom demand (based on use) and the amount of supply that is realistically available from public and sold markets.
- **Total Market Approach (TMA):** A coordinated approach to condom programming that ensures that free distribution and the sold market (including social marketing/social business, and commercial supply) work together to meet population needs efficiently and sustainably.
- **Wastage:** Condoms that expire, are damaged, or remain unused, often due to oversupply, poor targeting, or weak supply chain visibility.
- **Distortive Subsidy:** Subsidy that unintentionally crowds out the sold market, for example, when large volumes of free condoms reach populations that are able and willing to pay.

This guidance was commissioned by the Gates Foundation and prepared by Mann Global Health to support countries and partners in translating TMA principles into practical, implementable actions for condom programming in a constrained funding environment.

For questions or follow-up, please contact Chris Jones chris@mannglobalhealth.com or Nora Miller nora@mannglobalhealth.com.

ANNEX

Total Market Approach (TMA) Task Force or Working Group

Terms of Reference (Generic)

1. Purpose

The TMA Task Force is a multi-sector coordination body established to guide the design, implementation, and oversight of actions to stabilize and strengthen the national condom market. Operating within a Total Market Approach framework, the Task Force aligns the public, social marketing/social business, and commercial sector roles to ensure sustainable, equitable condom access while reducing reliance on external subsidies.

2. Goal

Support a sustainable condom market that maintains or increases equitable condom use, improves efficiency and targeting of free distribution, and enables the sold market to responsibly expand its contribution over time.

3. Objectives

The Task Force will:

1. **Support / validate market analysis** that outlines opportunities and constraints in the overall condom market.
 2. **Develop and operationalize a market roadmap** that defines a realistic vision for a healthy condom market and the roles of each sector.
 3. **Improve efficiency of public-sector condom programming** by strengthening targeting, reducing wastage, and aligning procurement with actual use.
 4. **Align planning, quantification, and procurement decisions** using demand-based tools (e.g., CNET) and a multi-year outlook.
 5. **Foster coordination across sectors** to align policy, regulation, procurement, and market incentives.
 6. **Support responsible expansion of the sold market** through data sharing, problem-solving, and targeted catalytic actions.
 7. **Inform donor and government investment decisions**, including Global Fund and domestic financing processes, using evidence-based market insights.
-

4. Key Deliverables

The Task Force will oversee or endorse the following outputs:

1. **Market Landscaping Analysis** summarizing gaps, constraints, and opportunities across supply, demand, and distribution.
 2. **Condom Market Roadmap** outlining priorities, targets, and timelines.
 3. **Updated quantification assumptions and procurement guidance** aligned with actual use and market roles.
 4. **Policy and regulatory recommendations** to reduce barriers to sold-market participation (e.g., VAT, registration, import processes).
 5. **Inputs to funding proposals and investment plans** (e.g., Global Fund, domestic budgets).
-

5. Membership

The Task Force should remain small enough to be effective, while ensuring whole-market representation.

Core members typically include:

- Ministry of Health (Chair) – HIV/SRH, policy, and planning leads
 - National AIDS Council or equivalent
 - Central Medical Stores / supply chain authority
 - Quantification and forecasting leads
 - Social marketing / social business representatives (where present)
 - Commercial sector representatives (importers, distributors, or associations)
 - Development partners (e.g., Global Fund, UNFPA) – advisory role
 - Technical partner/secretariat (as needed)
-

6. Operating Cadence

- Meet regularly (e.g., quarterly, with ad hoc sessions as needed).
- Use a clear agenda focused on decisions and follow-up actions.
- Maintain brief, action-oriented records and accountability for next steps.
- Review progress against agreed indicators annually.