



Mann Global Health

Condom Market Landscape Guidance

Annex to the Total Market Approach Playbook

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Description and Methodology

This Condom Market Landscape Guidance is a companion to the **Total Market Approach Playbook for Sustainable Condom Access**, which introduces concepts in simple, practical terms and provides **actionable steps** that national programmes can apply to ensure total market approach (TMA) strategies are operational. Read the playbook, which introduces key concepts and terminology, first.

The objective of this guidance is to produce a market landscape analysis that describes how the condom market functions across the commercial, social marketing, and public sectors—including weaknesses and opportunities—and implications for TMA-aligned programming. *This analysis will focus on the supply side, to understand potential supply gaps the country is facing and provide guidance on developing strategies to support a sustainable market.*

It can inform public sector procurement supported by the next Global Fund application and understand opportunities to engage the commercial and social marketing sectors comprising the sold market.

The analysis will also provide baseline data to measure progress. The report should integrate quantitative indicators and qualitative perspectives into a coherent story, surfacing insights and implications for action.

At minimum, this analysis should inform:

1. A vision for a sustainable market, including what is a realistic role for free distribution funded by remaining donors and budget support, and
2. The role of the sold market is to fill the anticipated gap in public sector supply.

Not all data identified below will be available; triangulate where necessary and make the best use of data that is available.

Do not let the perfect be the enemy of the good!



Understanding Condom Users and Use Trends

Why This Analysis Is Important

Understanding who uses condoms, where and when they (would like to) access them, and why they are important from a risk perspective is foundational to building a sustainable market addressing user needs. Analysis should also seek to understand why some groups do not consistently use condoms. Segmenting users can allow for better targeting of free, social marketed, and commercial products and reveals affordability, access, and behavioural barriers that may require programmatic response.

What to Analyse

- **Trends in reported use over time**, including condom use at last high-risk sex, disaggregated by age, gender, geography, key population status, with identification of worrisome trends, high-risk populations, risk behaviours, and epidemiological implications.
- **Reasons for inconsistent or non-use**, including perceptions of condom quality, brand recognition and preferences, partner dynamics, and social norms.
- **Channel preferences**, including where and when users obtain condoms and access during nights and weekends.
- **User satisfaction with available options**, including price, packaging, quality, and convenience, where data are available.
- **Willingness to pay** across major population segments.
- **Evidence of switching behaviours** between free, social, and commercial products.

Approach to Analysis

- Desk review, Demographic Health Surveys/ /Population based HIV Impact Assessment A [Performance Monitoring for Action](#) , Integrated Biological Behavioral Survey and other bio-behavioural surveys; social marketing organisation (SMO) brand tracking, segmentation studies, academic literature.
- Targeted key informant interviews with programmers, national programme staff, and commercial and social marketing actors (This document collectively refers to the 'sold market' to describe social marketing, social business, and commercial condom brands, recognizing their common role in meeting demand through channels where condoms are sold.



Market Size, Segmentation, and Structure

Why This Analysis Is Important

Quantifying the size (volumes) and structure of the total market across public, social marketing, and commercial channels helps to identify opportunities and risks and prioritise which segments can transition to sustainable supply through the sold market. It also informs on the sustainability of the current market and potential for future investment.

- **Volumes distributed by channel** across public, SMO, and commercial sectors, including estimated volumes for commercial sales and trends over the past five or more years.
- **Historical public sector stockouts** and their impact on overall supply.
- **Current stock levels and procurement pipelines** in the public and SMO sectors, including months of stock on hand, stock location from central to facility level, and anticipated shipments with committed funding.
- **Availability of committed for likely future funding** for public sector condom procurement, including estimated funding amounts and volumes.
- **Projected stockout timing** in the absence of future funding, assuming current distribution rates.
- **Geographic distribution and availability** across public, social marketing, and commercial sectors, including urban and rural patterns.
- **Outlet type coverage**, including pharmacies, shops, kiosks, and informal markets.

Sources and Methods

- National programme and supply chain data, including reports from national programmes, medical stores, Reproductive Health Supply Chain or other relevant sources.
- [RHSC RH Viz supply chain data.](#)
- [RHSC contraceptive social marketing reports.](#)
- Retail and market data, including retail audit reports, SMO dashboards (if available), outlet surveys, and market observations.
- Spot checks, including visits to distributors and retail outlets and short retail assessments in 2–3 representative districts.
- Key informant interviews with importers, SMOs, distributors, and major retailers.
- Desk review of sources, including regulatory brand registries, import data, and national strategies.

Public Sector Condom Supply Analysis: Deep Dive

Why This Analysis Is Important

The public sector accounts for a significant share of condom distribution in many countries, and in some, the majority. Diagnosing the efficiency, coverage, and resilience of public sector supply chains and stewardship functions is critical to identifying gaps and transition opportunities under a TMA.

The objective is to assess current and future management structures, identify system challenges, and determine how these can be addressed or accounted for in a vision for a sustainable condom market that meets population needs.

Governance and Structure

- Describe the existing structure and personnel supporting HIV prevention and condom programmes at the national and sub-national levels. Identify decision makers and influencers, and for all, identify challenges, gaps, and opportunities.
- **What is the Global Fund GC 8 planning and writing process?** Who are the influencers, decision makers, doers, and writers? What is the timeline to develop the proposal?
- Is there a condom strategy and/or a TMA strategy? Are they operational?
- Is there a functional coordinating body, condom TWG or TMA Working Group? Is it guided by an agreed workplan supporting strategy? How are sub-national teams engaged?
- Are there standard operating procedures supporting condom management that are used and updated?

Financing, Planning, and Procurement

- What is the process, timing for condom quantification, planning, and how do they translate to procurement strategies? How are condoms for family planning factored in?
- What is the quantified funding gap for free condoms, based on committed funding versus required funding?
- What is the structure and frequency of condom procurement (e.g., annual tenders, emergency orders)?
- What are the current practices and future plans for condom procurement, including branded versus generic products and product variants?
- What is the process and realistic possibility of allocating domestic resources for condom procurement? Who initiates the order (e.g., facility, district, province)? If it is not an opportunity, what are the advocacy priorities?

Storage and Warehousing

- Is there sufficient storage capacity at national, provincial, and sub-national levels?
- Is there adequate buffer stock management (e.g., minimum stock levels, shelf-life monitoring) at regional warehouses?
- Are there practices and standard operating procedures for stock handling (e.g., receipt, rotation, and expiry tracking)? Are they functioning?
- Are there contingency plans for stockouts or oversupply at facilities (e.g., redirecting supply)?
- Are there redistribution protocols between facilities or districts?

Distribution and Supply Chain

- Describe systems and resources to deliver condoms from a central warehouse to regional or provincial warehouses, including identifying gaps, challenges, and opportunities.
- What is the scale and coverage of free distribution programmes, including the role of primary (e.g., clinical) and secondary (e.g., post-facility) distribution sites?
- Is there a strategy guiding public sector distribution? Are population groups prioritised?
- Is the system push or pull? What are the known gaps?
- Is there mapping and active use of non-traditional distribution points to guide distribution, and is the system functional?
- What delivery mechanisms and schedules are in place, and how consistent are they?

Data and Information Systems

- Is a logistics management information system used to manage inventories and is it functional?
- What tools are used at the facility level (e.g., bin cards, stock report forms, electronic dashboards)?
- How frequent and timely are data submissions, and how well do facilities adhere to reporting requirements (e.g., monthly deadlines)?
- How are data used for forecasting and redistribution decisions?

Demand-Side Interventions

- What demand-side interventions are currently in place?

Approach to Analysis

- Desk review: national condom/TMA strategies, demand generation plans, standard operating procedures, Global Fund grants, UNFPA plans; Condom Needs Estimation Tool assumptions, implementer project reports.
- Key information interviews: NAC/MOH condom focal points, SMOs

Sold Market Condom Analysis

Why This Analysis Is Important

This document outlines key elements to assess when analysing the private sector condom supply chain. Understanding the business model, incentives, constraints, and potential of commercial actors allows targeted catalytic investments and regulatory improvements that grow the market without distorting it.

This analysis can also be used to develop a profile of potential (priority) partners.

Market Presence and Brand Portfolio

- Number and types of condom brands registered in the country and available in the market. Differentiate between sustained presence and erratic presence by 'suitcase importers'
- Brand ownership: importers and distributors, global brand owners, agents.
- Differentiation: premium versus value brands; flavoured, textured, ultra-thin, etc.; number of SKUs per brand
- Positioning strategies (e.g., luxury, lifestyle, functional)
- Top 3 brands in the market
- Presence of low priced (affordable) brands and perceived quality
- Relative importance of condoms in a company's product portfolio (e.g., do they sell more than condoms, and if so, what share of their business is condoms?)
- Barriers to commercial entry (e.g., import fees, unclear demand, distorting subsidy, weak retail channels)

Regulatory and Market Access (Informs Advocacy with Government)

- Status of product registration with national regulatory authorities
- Length and complexity of product approval and import clearance processes
- Fees, VAT, and duties applied to condom imports
- Regulatory and system bottlenecks impacting time-to-market

Importation and Local Distribution (Importer Specific)

- Source of supply and how partnership with manufacturers was created; describe quality of relationship
- Import volumes, frequency, and customs clearance timelines
- Frequency of ordering from supplier (e.g., monthly, quarterly, ad hoc)
- Typical order sizes (volume and value) and what dictates order sizes (e.g., filling a container)
- Factors that determine order quantities (e.g., sales data, inventory levels, promotional cycles, market factors such as distribution of public and social marketing)
- Average time from order placement to warehouse delivery (in-country)
- Payment terms with suppliers (e.g., pre-payment, net-30)

- In-country distribution partners (e.g., wholesalers, aggregators, logistics firms) Availability of warehousing and buffer stock

Retail and Channel Penetration

- Coverage across retail channels (e.g., pharmacies, supermarkets, convenience stores)
- Penetration in informal markets (e.g., street vendors, nightclubs, kiosks)
- Geographic reach (e.g., urban versus rural distribution capacity)
- Access to institutions (e.g., universities, workplaces, NGOs)

Pricing and Affordability

- Retail pricing by brand and format (e.g., single, 3-pack, bulk)
- Pricing strategy, including margin structure and discounts
- Consumer affordability assessment by segment (e.g., Willingness to Pay data)

Sales, Promotion, and Demand Generation

- Marketing channels used (if any) (e.g., TV, radio, digital, influencer, POS)
- Use of promotions, loyalty programmes, or in-store activations

Supply Chain Agility and Responsiveness

- Inventory planning, including stock turnover rate and stockout frequency
- Responsiveness to shifts in demand (e.g., holiday spikes, public campaigns, stockouts)
- Lead time from manufacturer/importer to shelf
- Resilience to supply disruptions (e.g., port delays, regulatory changes)

Data Availability and Use

- Access to retail or wholesale sales data (volume, value)
- Use of data for forecasting, marketing decisions, and channel performance
- Willingness of private firms to share select performance data with TMA stakeholders

Investment Appetite and Strategic Fit

- Willingness to co-invest in market development (e.g., TMA-aligned campaigns)
- Alignment with TMA principles (e.g., equity, efficiency, sustainability)
- Interest in entering public tenders or institutional supply
- Capacity to scale importation or distribution if market expands

Data Collection Tools

To populate the guidance above, three primary data collection methods are recommended, as outlined below.

1. Key Informant Interview Guide

Use this to interview distributors, wholesalers, brand managers, and procurement leads.

- What are your top-selling SKUs and how has the portfolio changed over time?
- Are you seeing shifts in consumer preferences (e.g., thin condoms, flavoured, textured, latex-free)?
- How often do you place condom orders? What determines timing?
- How do you calculate your order sizes? What data or assumptions do you rely on?
- What is the average time between order placement and delivery?
- Describe your payment terms with suppliers (e.g., advance, 30/60 days).
- What role does the condom category play in your overall commercial strategy?
- How are condom stockouts managed? How frequent are they?
- What are the key barriers to developing your condom business? Do you experience delays at customs or regulatory bottlenecks? How do you manage them?

2. Market Observation Checklist

For visits to retail points (e.g., pharmacies, supermarkets, kiosks, shops):

- Are condoms visibly stocked? (Y/N)
- Number of brands available: ___
- Price per SKU (single, 3-pack, 12-pack): ___
- Stock placement: behind counter / on shelf / other: ___
- Promotional signage visible? (Y/N)
- Product expiration within acceptable range? (Y/N)
- Variety of options: flavoured, textured, premium, etc.: ___
- Store personnel knowledge of condoms (basic questions test): ___

3. Desk Review and Documentation Analysis

To extract structured insights from reports, marketing decks, or internal plans:

- Confirm registration status and regulatory timeline from government registration record
- Review sales reports, category performance summaries, and promotional calendars
- Analyse pricing trends from wholesaler and distributor catalogues
- Extract distribution footprint from business development or channel expansion documents

These tools help triangulate data and validate findings during TMA landscaping and partner due diligence.

Recommended Use

This checklist supports diagnostics of commercial actors within the condom market. It can be applied during landscaping studies, business case development, or partner engagement to identify investment opportunities and gaps in the commercial supply chain. It also helps to benchmark potential private sector partners for co-investment or coordination under TMA strategies.

