

# **Malaria RDT Market Creation and Stimulation The Kenya Experience**

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**Malaria rapid diagnostic tests (RDTs) and fever case management  
in the private health care sector in Africa: a consultative working meeting**

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# Presentation outline

- Private sector context
- CHAI experience – supporting NMCP in accelerating uptake of RDTs in the private sector
- Lessons learnt
- Challenges

# Kenya provides an opportunity to increase RDT sale and use in the private sector

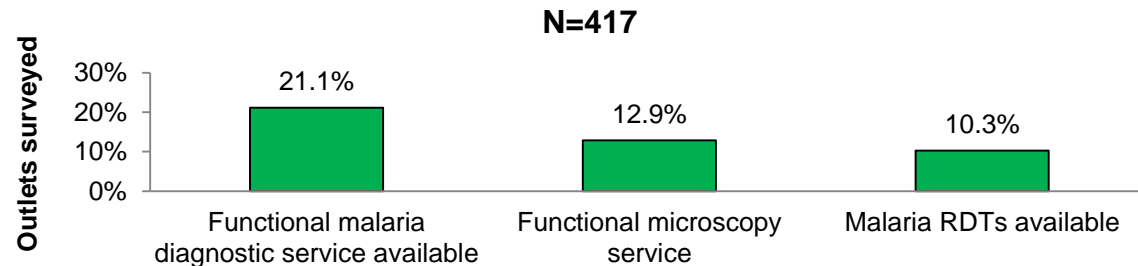
**PRIVATE  
SECTOR**

- Case management guidelines indicate that all suspected malaria cases should receive a confirmatory test (RDT or Microscopy)
- 30% - 40% of population seeks treatment for febrile illnesses in this sector
- Characterized by private for profit and private not for profit outlets, as well as formal and informal
- Comprises of hospitals, clinics, nursing homes, laboratories, pharmacies\* (wholesale and retail),
- Presence of strong regulation, RDTs can be sold and used in registered private-for-profit hospitals, clinics, laboratories, and pharmacies\*.

- 35% - 40% of ACTs are accessed through the private sector
- Availability of ACTs 95.2%. Non Artemisinin based therapies 60.2%



- Coverage of diagnostic services 21.1%



# With adoption of the Test, Treat and Track policy, CHAI expanded scope from treatment access to supporting NMCP to increase malaria diagnostic capacity by accelerating the uptake of mRDTs in the private sector.

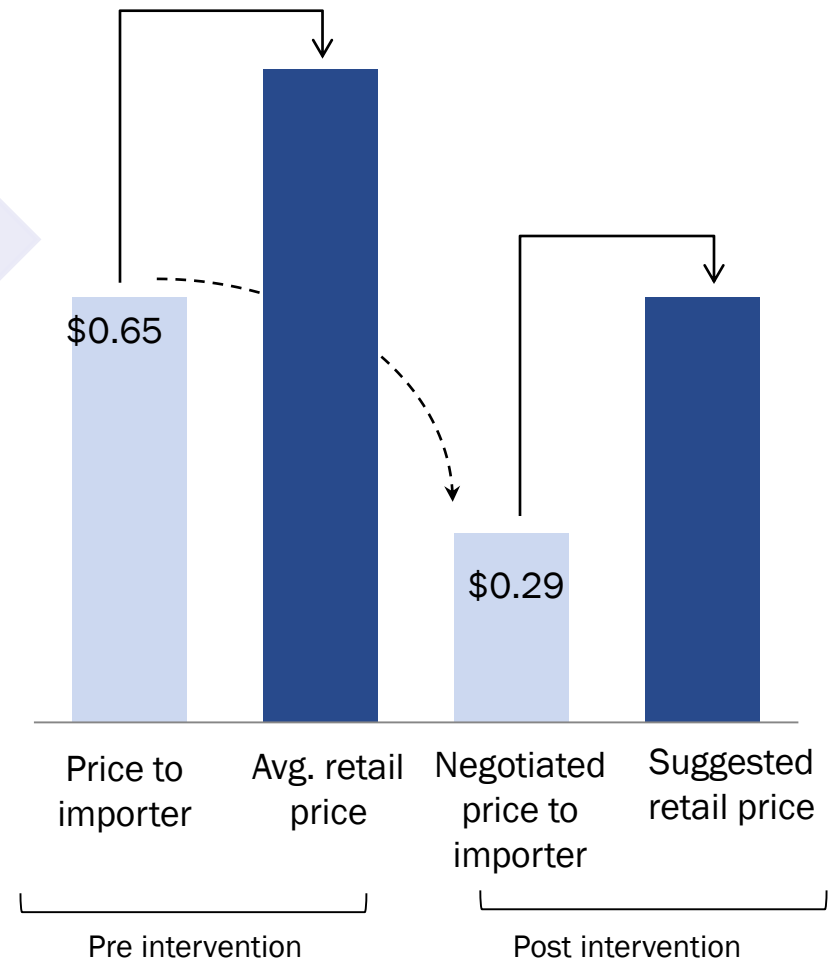
## Lower retail prices

Commit high quality manufacturers to a preferred pricing scheme for malaria RDTs

Promote recommended retail price to providers and consumers.

- CHAI helped RDT manufacturers understand private sector market potential
- Negotiated low cost model for Kenya and Tanzania in which importers could access low manufacturer prices in return for low yet sustainable margins

## Rapid diagnostic test costs and markups USD



From Q3 2013 – date, market creation and stimulation activities have been implemented to support the uptake of malaria RDTs in the Private Sector:

## Expand distribution channels

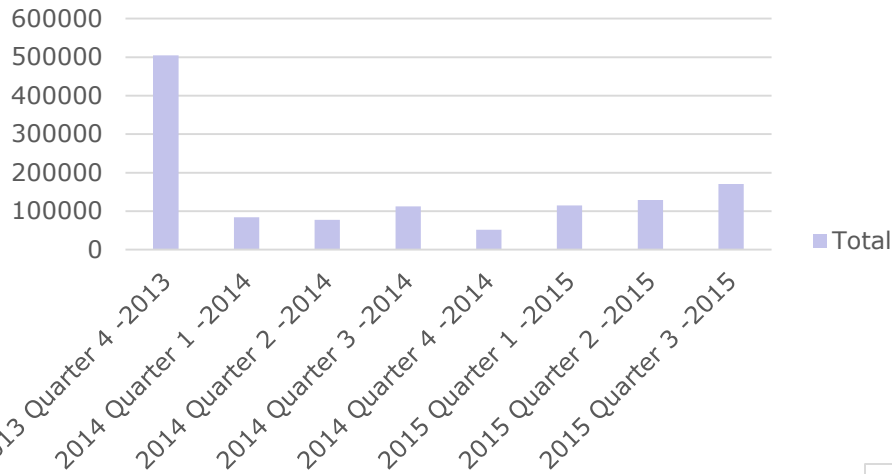
- Identify existing distributors
- Establishing other interested distributors – e.g. AMFm first line buyers
- Encourage and support aggressive use of existing distribution networks
- Generate market intelligence to influence risk averse members

## Demand generation

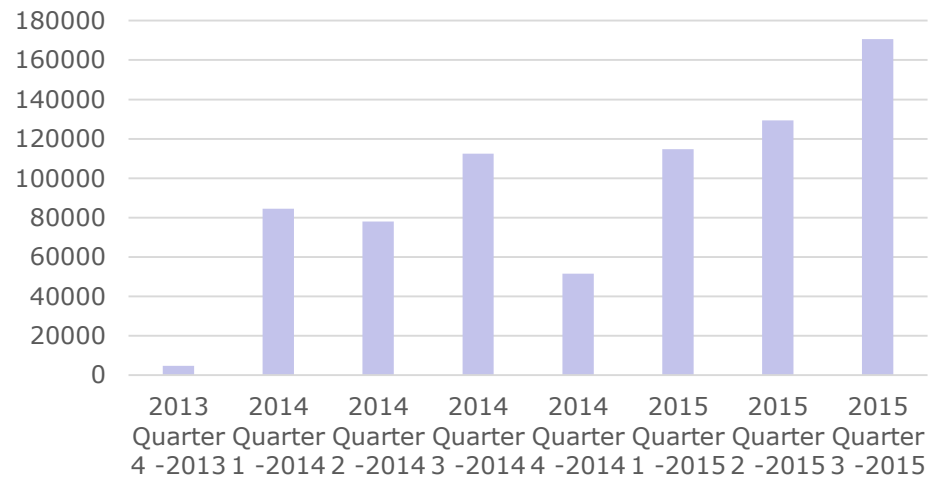
- Distinguish the brand/commodity/service
- Health provider training through CMEs and other private sector targeted trainings
- Retail level promotional activities & material distribution
- Public awareness through mass media and interpersonal communication\*
- Targeted marketing based on post training uptake

# Resultant low cost mRDT sales growth

RDT SALES ( W/PSK)



RDT SALES ( Wo/PSK)



# Key lessons learnt in engaging the private sector:

- ✓ Identifying, mapping and categorizing
- ✓ Adopt innovative approaches to attract interest and participation
- ✓ Use a consultative and informative approach
- ✓ Planning for and with the private sector
- ✓ Involve the sector in routine reporting, M&E and OR
- ✓ Routinely updating stakeholders in the sector
- ✓ Align with existing regulation



# Challenges

- Disconnect between potential market and actual market
- Product uptake varies greatly from uptake of a service; especially at retail level
- Unresolved regulatory issues



# Thank You



