

8.0 THE DEMOCRATIC REPUBLIC OF CONGO - Socio-Political

8.1 Introduction

Location: Central Africa, northeast of Angola

Land Boundaries: Angola, Burundi, Central African Republic, Republic of the Congo, Rwanda, Sudan, Uganda, Zambia

Coast: South Atlantic Ocean (37km)

Climate: tropical; hot and humid in equatorial river basin; cooler and drier in southern highlands; cooler and wetter in eastern highlands; north of Equator - wet season April-October, dry season December-February; south of Equator - wet season November-March, dry season April-October

Elevation Extremes:

lowest point: Atlantic Ocean 0 m

highest point: Margherita Peak (Mount Stanley) 5,110 m

Terrain: vast basin is a low-lying plateau; mountains in east

Environment - current issues: poaching threatens wildlife populations; water pollution; deforestation; refugees who arrived in mid-1994 were responsible for significant deforestation, soil erosion and wildlife poaching in the eastern part of the country (most of these refugees were repatriated in November and December 1996)

8.2 Political

8.2.1 Government

Independence: June 30, 1960 (from Belgium)

Type of Government: dictatorship; presumably undergoing a transition to representative government

National Capital: Kinshasa

Other major towns: Lubumbashi, Kisangani, port of Matadi in the Zaire (Congo)

River estuary

Administrative Divisions: 10 provinces and one city*; Bandundu, Bas-Congo, Equateur, Kasai-Occidental, Kasai-Oriental, Katanga, Kinshasa*, Maniema, Nord-Kivu, Orientale, Sud-Kivu

Constitution: June 24, 1967, amended August 1974, revised February 1978, amended April 1990; transitional constitution promulgated in April 1994; following successful

rebellion the new government announced on May 29, 1997 a two-year table of constitutional reform

Executive Branch:

chief of state: President Laurent Desire Kabila (since May 17, 1997)

head of government: President Laurent Desire Kabila (since May 17, 1997); the president is both chief of state and head of government

cabinet: National Executive Council; Kabila's cabinet was appointed by him and has no prime minister

elections: before Kabila seized power, the president was elected by popular vote for a seven-year term; elections last held July 29, 1984 (next to be held NA); formerly, the prime minister was elected by the High Council of the Republic; note - the term of the former government expired in 1991, elections were not held, and former president Mobutu continued in office until his government was militarily defeated by Kabila on May 17, 1997.

Legislative Branch: legislative activity has been suspended pending the establishment of Kabila's promised constitutional reforms and the elections to be held by April 1999

elections: the country's first multi-party presidential and legislative elections had been scheduled for May 1997 but were not held; instead Kabila overthrew the Mobutu government and seized control of the country.

Political Parties: sole legal party until January 1991 - Popular Movement of the Revolution (MPR); other parties include Union for Democracy and Social Progress (UDPS), Democratic Social Christian Party (PDSC), Union of Federalists and Independent Republicans (UFERI), Unified Lumunbast Party (PALU)

note: President Kabila, who has banned political party activity indefinitely, currently leads the Alliance of Democratic Forces for the Liberation of Congo-Zaire (AFDL)

8.2.2 Present Conflict/Instability

On going civil war involving several surrounding nations, whether through military support or mediation efforts.

Refugees from Rwanda and Burundi in east of country.

Republic of Congo-Tanzania-Zambia tri-point in Lake Tanganyika may no longer be indefinite since it has been informally reported that the indefinite section of the Democratic Republic of Congo-Zambia boundary has been settled; long segment of the boundary with Republic of the Congo along the Congo river is indefinite (no division of the river or its islands has been made)

8.3 Economy

Overview:

The economy of Democratic Republic of the Congo - a nation endowed with vast potential wealth - has declined significantly since the mid-1980s. The new government has instituted a tight fiscal policy that has curbed inflation and currency depreciation. Plans are underway to introduce a new national currency. Most formal transactions are conducted in hard currency but a barter economy flourishes in all but the largest cities. Most individuals and families survive through subsistence farming or petty trade. International investors show renewed, but cautious interest, especially in the mining and telecommunications sectors. However, poor infrastructure, an uncertain legal framework, corruption and lack of transparency in government economic policy serve to hinder investment and growth. A number of IMF and World Bank missions have met with the new government to help it develop a coherent plan.

8.3.1 General Statistics

Population	49,000,511 (July 1998 est.)
Population Growth Rate	2.99 % (1998 est.)
Age Structure:	0-14 years: 48% 15-64 years: 49% 65 years and over: 3%
Infant Mortality Rate	101.6 deaths/1000 live births (1998 est.)
Life Expectancy at Birth	male: 47.27 years female: 51.43 years (1998 est.)
Total Fertility Rate	6.51 children born/woman (1998 est.)
Literacy Rate	total population: 77.3 % male: 86.6 % female: 67.7 (1995 est.)
Languages	French (official), Lingala (a lingua franca trade language), Kingwana, (a dialect of Kiswahili), Kikongo, Tshiluba

8.3.2 Economic Indicators

GDP (\$US million)	19,437 (1996)
GDP growth (%)	0.4 (1992-1996)
GDP/head (\$US)	415 (1997)
Inflation (%)	NA
Unemployment Rate (%)	NA

Budget	<i>revenues: \$269 million expenditures: \$244 million, including capital expenditures of \$24 million (1996 est.)</i>
Foreign Debt (US\$ billion)	13.8 (1995 est.)

Currency	1 zaire (Z) = 100 makuta
Exchange Rate (official): new zaires (Z) per US\$1 (note: on 22 October 1993 the new zaire, equal to 3,000,000 old zaires, was introduced.)	115,000 (January 1998)

Main Exports	Copper and Cobalt (90%), Diamonds
Main Economic Activities	Agriculture, Mining

8.3.3 Industries & Natural Resources

Industries: mining, mineral processing, consumer products (including textiles, footwear, cigarettes, processed food and beverages), cement, diamonds

Natural Resources: cobalt, copper, cadmium, petroleum, industrial and gem diamonds, gold, silver, zinc, manganese, tin, germanium, uranium, radium, iron ore, coal, hydro-power potential

Agriculture – products: coffee, sugar, palm oil, rubber, tea, quinine, cassava, palm oil, bananas, root crops, corn, fruits; wood products

8.3.4 Trade

Exports

total value: \$1.9 billion (f.o.b., 1996 est.)

commodities: diamonds, copper, coffee, cobalt, crude oil

partners: Belgium, USA, France, Germany, Italy, UK, Japan, South Africa

Imports

total value: \$1.1 billion (f.o.b., 1996 est.)

commodities: consumer goods, foodstuffs, mining and other machinery, transport equipment, fuels

partners: Belgium, South Africa, USA, France, Germany, Italy, Japan, UK

9.0 ITN MARKET IN THE DEMOCRATIC REPUBLIC OF CONGO

Not surprisingly, because of its pervasive and long lasting instability, of all the countries

surveyed, the DRC was the least aware of ITN effectiveness and also perhaps least able to do anything about that. The DRC is a huge country, the largest in Africa. It holds the greatest river, the largest rainforests, the biggest city, and the richest mineral reserves of Central Africa. There is amazing wildlife and scenery, vibrant music, an enormous network of inland waterways, and unfortunately, some of the worst roads and infrastructure in the world. All of this makes the logistics of distribution quite a challenge.

The main malaria prevention program in D.R. Congo was initiated by USAID in 1982 as part of a more comprehensive vaccination campaign. Unfortunately, due to various complications, including the ongoing political instability, the program was not effective. The light has been rekindled this year (1999) by World Health Organisation with funding of \$500,000 which is to be directed at Malaria control programs.

9.1 *Supply Issues*

9.1.1 **Production and Distribution**

9.1.1.1 Nets

- Textile industries in-country produce cotton nets but they are not very popular.
- Other net material used is imported from Pakistan or China.
- Nets are imported by local traders who often tend to be from the Lebanese, Indian, Pakistani, and Senegalese communities.
- The retail cost of an imported net averages \$7/net (nylon, polyester or cotton).
- Large rectangle nets that hang from the ceiling are often quite expensive: up to \$35.
- Five workshops (tailors/artisans) that produce nets were identified in Kinshasa. Their production capacity is 3 to 5 nets a day. It is unclear how many such operations may exist.

9.1.1.2 Insecticides

- There was no manufacturer or importer identified who distributed insecticide which is specifically designed or marketed for mosquito nets.
- One local manufacturer of spray insecticide is COBEGA; their product is COBETAX and is sold at \$1.90.
- The usual array of insecticides for agriculture and pest control exist.

9.1.1.3 ITNs

- There is a small and embryonic project run by a Baptist Church in the municipality of Bandalungwa which has been trying to produce ITNs. The results are very poor because of lack of resources. At the time of this research, the project had not been in operation for six months. At this point, they are working out a partnership deal with the Ministry of Health.

9.1.2 Trade Barriers

- Tax policies are unclear and administered inconsistently, but when pressed, duties of 13% to 18% were quoted.
- Aware of the health implications of ITNs, the government is considering eliminating taxes on ITNs.

9.2 Current Market

9.2.1 Local Market

- Nets from various (mostly far east) countries can be found with some effort in the markets.
- No ITNs (nets and insecticide together) are found anywhere in Kinshasa.
- Net distributors were quite unwilling to release information about the volume they buy or sell.
- Some of the 30,000 units imported by the Ministry of Health with funding from WHO have begun to make their way into the markets.

9.2.2 NGO Market

- In Kinshasa, a city of 5,793,000 people, there is a small group run by Baptist church that are trying produce 500 ITNs per month (with limited resources) but there is little public awareness of the initiative.
- Otherwise, no NGOs were identified that had programs involving distribution of ITNs .

9.3 Marketing

9.3.1 Companies

- None of the companies interviewed indicated any marketing plan, research or awareness campaign related to nets and / or insecticide.

9.3.2 Ministry of Health (MOH)

- The MOH did not report activity, study or done any market survey for ITNs.
- The immediate strategy of the MOH included procurement of 30,000 nets (from Thailand) and 500 litres of insecticides for distribution in 4 provinces (out of 9 provinces). This program is expected to be directed at the most needy and therefore highly subsidized.

9.4 Knowledge of ITNs

Very limited knowledge of ITNs among the general population.

9.5 Past History of Malaria Prevention

- Most common method is spray insecticides such as:
 - ELF imported by ELF-Congo \$2/400ml
 - MOBIL imported by Mobil Oil-Congo \$1.45/300ml
 - BAYGON imported by Group Aladef \$2.75/300ml

- KILIT imported by Polygard \$2/300ml
- COBRA imported by Hasson et Freres \$2/300ml
- An estimated 20 % of Kinshasa population uses spray insecticides.
- Others also report use of repulsives, serpentines, etc.

9.6 Demographics

Population of main urban areas:

Kinshasa:	5,793,000
Lubumbashi	851,381
Kisangani	417,517
Mbuji-Mayi	350,000
Kananga	300,000

Total 7,711,898 or 15.4% of the total population (50,000,000)

10.0 GHANA - Socio-Political

10.1 Introduction

Location: Western Africa, bordering the Gulf of Guinea, between Cote d'Ivoire and Togo

Land Boundaries: Burkina Faso, Cote d'Ivoire, Togo

Coast: Gulf of Guinea

Climate: tropical; warm and comparatively dry along southeast coast; hot and humid in southwest; hot and dry in north

Elevation Extremes:

lowest point: Atlantic Ocean 0 m

highest point: Mount Afadjato 880 m

Terrain: mostly low plains with dissected plateau in south-central area

Environment - current issues: recent drought in north severely affecting agricultural activities; deforestation; overgrazing; soil erosion; poaching and habitat destruction threatens wildlife populations; water pollution; inadequate supplies of potable water

10.2 Political

10.2.1 Government

Independence: March 6, 1957

Type of Government: Constitutional Democracy

National Capital: Accra

Other major towns: Kumasi, Tamale, ports of Cape Coast, Tema, and Takoradi

Administrative Divisions: 10 regions; Ashanti, Brong-Ahafo, Central, Easter, Greater Accra, Northern, Upper East, Upper West, Volta, Western

Constitution: new constitution approved April 28, 1992

Executive Branch:

chief of state: President Jerry John RAWLINGS (since January 7, 1993)

head of government: President Jerry John RAWLINGS (since January 7, 1993); the president is both chief of state and head of government

cabinet: Council of Ministers; president nominates members subject to approval by the Parliament

elections: president and vice president elected by popular vote for four-year terms; election last held December 1996 (next to be held NA, 2000)

Legislative Branch: unicameral National Assembly (200 seats; members are elected by direct popular vote to serve four-year

elections: last held December 7, 1996 (next to be held December 2000)

Political Parties: National Democratic Congress (NDC), New Patriotic Party (NPP), People's Heritage Party (PHP), National Convention Party (NCP), Every Ghanaian Living Everywhere (EGLE), Peoples Convention Party (PCP), Peoples National Convention (PNC)

10.2.2 Present Conflict/Instability

None.

10.3 Economy

Overview:

Well endowed with natural resources, Ghana has twice the per capita output of the poorer countries in West Africa. Even so, Ghana remains heavily dependent on international financial and technical assistance. Gold, timber, and cocoa production are major sources of foreign exchange. The domestic economy continues to revolve around subsistence agriculture, which accounts for 41% of GDP and employs 60% of the workforce, mainly small landholders. In 1995-97, Ghana made mixed progress under a three-year structural adjustment program in cooperation with the IMF. On the minus side, public sector wage increases and regional peacekeeping commitments have led to continued inflationary deficit financing, depreciation of the cedi, and rising public discontent with Ghana's austerity measures.

10.3.1 General Statistics

Population	18,497,206 (July 1998 est.)
Population Growth Rate	2.13% (1998 est.)
Age Structure:	0-14 years: 43% 15-64 years: 54% 65 years and over: 3%
Infant Mortality Rate	77.53 deaths/1000 live births (1998 est.)
Life Expectancy at Birth	male: 54.77 years female: 58.92 years (1998 est.)
Total Fertility Rate	4.27 children born/woman (1998 est.)
Literacy Rate	total population: 64.5% male: 75.9 % female: 53.5% (1995 est.)
Languages	English (official), Akan, Moshi-Dagomba, Ewe, Ga, others

10.3.2 Economic Indicators

GDP (\$US million)	6,061 (1996)
GDP growth (%)	4.3 (1992-1996)
GDP/head (\$US)	340 (1997)
Inflation (%)	27.9 (1997)
Unemployment Rate (%)	20 (1997 est.)

Budget	revenues: \$1.39 million expenditures: \$1.47 million, including capital expenditures of \$370 million (1996 est.)
Foreign Debt (US\$ billion)	6.4 (1997)

Currency	1 new cedi (C) = 100 pesewas
Exchange Rate (official): Cedis per US\$1	2,325 (Sept. 1998)

Main Exports	Gold, Cocoa, Wood
Main Economic Activities	Agriculture, mining

10.3.3 Industries & Natural Resources

Industries: mining, lumbering, light manufacturing, aluminum smelting, food processing

Natural Resources - gold, timber, industrial diamonds, bauxite, manganese, fish, rubber

Agriculture – products: cocoa, rice, coffee, cassava, peanuts, corn, shea nuts, bananas; timber

10.3.4 Trade

Exports

total value: \$1.57 billion (f.o.b., 1996 est.)

commodities: gold, cocoa, timber, tuna, bauxite, aluminum, manganese ore, and diamonds (1996)

partners: UK, Germany, USA, Netherlands, Japan, Nigeria

Imports

total value: 1.84 billion (c.i.f., 1995)

commodities: capital equipment, petroleum, consumer goods, foods, intermediate goods

partners: UK, Nigeria, USA, Germany, Japan, Netherlands

11.0 ITN MARKET IN GHANA

Malaria in Ghana is recognized as a significant problem with reports from 1994 claiming that Malaria was responsible for 25% of all the deaths among children under 5 years of age. (Binka et al 1994, NMCP 1998). But in spite of a long established tradition in Ghana of using mosquito nets at boarding schools, which many students attend, there is little evidence of other widespread, popular usage. There are a number of ITN initiatives at various stages of development, but perhaps the most significant is a USAID financed program for public - private sector cooperation designed to encourage greater promotion and distribution of ITNs. This project is in the last stages of review and approval by USAID.

11.1 Supply Issues

11.1.1 Production

11.1.1.1 Nets

- No manufacturing is done in-country. The closest thing to a net producer is a company in Tema called Nylon Netting Co. Ltd (Farro Fabric). They sell nylon fabric for about \$10 a roll – 1 m x 30 m. Tariffs on inputs (10%) reimbursed if the product is exported.
- Importation is from: Taiwan; Thailand – Siam Dutch (sold through AgriMat and Huge); Nigeria

- Distribution is by: Plan International; Huge; Chemdol
- Sizes and Prices – infant net (8,000-15,000 cedis/\$2.96-5.55)
 - single (28,000 cedis/\$10.37)
 - double (38,000 cedis/\$14.07)

11.1.1.2 Insecticide

- No manufacturing of specific net treatment products is done in-country (although SC Johnson has a manufacturing facility producing other insect control products).
- Distribution is by:
 - AgriMat (AgrEvo – ‘K-O Tab’),
 - Huge (Bayer – ‘Solfac’),
 - Chemdol,
 - SC Johnson (no individual treatment pkg). (SC Johnson – production facility, not a distributor);
 - Chemico (Zeneca - but not selling ICONET yet)
- Prices:
 - K-O Tab - \$2 (5000 cedis)
 - ‘K-O Net’ (net with tab) – \$12 (30,000 cedis)
 - SOLFAC 20ml – \$2 (5000 cedis)
 - ICONET – predicted to sell at higher than 5000 cedis

11.1.2 Distribution

11.1.2.1 Nets

- Distribution is limited but mainly through distribution channels of companies such as AgriMat and Huge.
- Other distribution is through NGO projects, specifically Plan International and Navrongo projects.

11.1.2.2 Insecticide

- Distribution mainly through distribution channels of companies producing (primarily agricultural) insect control products.

11.1.3 Trade Barriers

Import Duty: 25% for nets

10% for insecticide

VAT: 10% on all products

11.2 Current Market

At present there is a limited market for malaria prevention but more significant markets for malaria treatment and insect nuisance control (Reed et al, 1999).

11.2.1 Local Market

Nets are simply not widely available in the marketplace. The only nets found were at the distributor's retail outlet. They were working on, but had not yet introduced nets into pharmacies. Nets are likely available at small shops and in some markets, but none were spotted on this trip.

11.2.2 NGO Market

Information gathered showed relatively little programming among NGOs related to nets and insecticide.

11.2.2.1 Ghana Social Marketing Foundation (GSMF)

- GSMF will be the secretariat for the private/public sector project task force work in Ghana.
- Details of this program are contained in a funding proposal which is currently being considered by USAID. It is thought that approval may be forthcoming some time in September or October. - It is thought that the program will cost in the range of \$1 million over two years (although details of the proposal to USAID were not made available).
- The initial strategy was the "seal of approval" method, which means that companies that are a part of the task force or "network" could use the "seal of approval". Promotion would be generic and based on the seal of approval.

11.2.2.2 PLAN International

- Programming includes ITNs, but because the program officer was on leave, it was not determined the extent of the program or the number of nets distributed

11.2.2.3 UNICEF

- UNICEF manages a program dealing with ITN distribution in two communities in northern Ghana.
- 71,000 nets were brought in from UNICEF central procurement in Copenhagen (nets believed to be Siam Dutch). Of that, about 3900 nets have been sent to the field.
- Only 650-700 nets have been sold to date in the two communities through the district health workers.
- Nets cost 12,000-13,000 cedi (about \$5), including one dipping.
- Follow-up dipping is through communal dipping programs, although they are not happy with this method and would like to move towards single dose options. (They were sceptical though, that people would pay the single dose price of \$1).
- Distribution is through a structure of 4000 community health volunteers and they plan to give each volunteer a bonus of one net.

11.2.2.4 USAID

- There currently is a proposal that grew out of the “private-public sector” (PP) partnership talks initiated by BASICS in 1997 / 1998.
- The USAID strategy is tightly bound to this PP framework which will be overseen by a task force made up of MOH, AID, NGOs, DFID, Ghana Social Marketing and a few businesses
- The proposal, now in the final stages of approval, is worth some 1 million over two years with a possible third year. Any Ghana work arising out of the NETMARK contract would be additional to this program.

11.2.2.5 World Health Organization (WHO)

- WHO money is almost always spent through the Ministry of Health (MOH).
- MOH budget (funded by the WHO) has money included for research. Actual nets and insecticide were also made available to the MOH.
- Approximately 15,000 nets were brought in by the WHO.
- To date they are unaware if any had been sold.

11.2.2.6 World Vision

- No programs exist specifically targeted at malaria control but there are many integrated community health programs.
- As yet, nets were not a strategy employed by these health programs.

11.3 Marketing

11.3.1 Companies

- Very little marketing is being done specifically for ITNs, although one company is beginning to put advertisements in the newspaper.
- Some marketing is being done for the promotion of nets and insecticide, as separate and unrelated products.

11.3.1.1 AgriMat

- AgriMat is just beginning to sell ‘K-O Net’ package locally (K O tab packaged together with a net). Very few have been sold to date.
- This company is optimistic about the future ITN market.
- AgriMat recently participated in a Ministry of Health program to train local health district workers.
- The marketing strategy is targeted at pharmacies. They believe that the pharmacist can promote prevention when customers come in for the cure.
- However, even if AgriMat gives the pharmacies a steep discount on the prices they are selling at, the retail store price may well be around \$15 (which may be a little high). Over time, increased volumes and getting into the more “informal” markets may have an impact on that.
- The main obstacle to increased sales is credit and the risk of pharmacies

not paying.

11.3.1.2 SC Johnson Wax

- J&J is not currently manufacturing a single dose insecticide product but anticipate participating in the USAID NETMARK project.
- Presently J&J manufactures 'Raid' products, especially coils.

11.3.2 Ministry of Health (MOH)

Key components of the Ghana MOH's approach to malaria control in Ghana are contained in the document entitled "Medium Term Strategic Plan for Malaria Control in Ghana (1998 - 2001). Through this plan, the MOH expects to 'improve the coverage of malaria control activity by adopting the inter-sectoral approach, involving other government sectors and in partnership with the private sector and the community' (Strategic Plan 1998). The key elements of the plan are:

1. To improve disease management at the Health Facility and the Community Level
2. Vector Control, through the promotion of Insecticide Treated Materials (ITNS)
3. Develop and strengthen Information, Education and Communication
4. Develop and strengthen Health Management Information Systems for malaria.⁴

Some examples of MOH ITN programs to date include work done in conjunctions with PATH Canada as follows: examining the existing use of mosquito nets in the country (1996), identifying short and medium term market strategies for ITNs (1997), and developing a rapid assessment tool for measuring ITN coverage in conjunction with the Ministry of Health (1998 -99).¹

Current malaria programs at the MOH are administered primarily by Dr. George Amofha and Dr. Aba Baffoe Wilmot (epidemiologist). They are both members of the USAID financed private/public sector task force which will be implementing the social marketing strategy in Ghana.

11.4 Knowledge of ITNs and Their Benefits

11.4.1 Public

According to the January 1999 Draft Proposal - Marketing Plan for Review by Ghana ITN Task Force¹, many consumers are aware of malaria and mosquito control as protection from it. Unfortunately, there is also a great deal of false information regarding the causes of malaria circulating as well. And while significant investments seem to be spent on treatment of malaria and insect control (coils, repellent etc.), the use of bed nets is currently limited to boarding schools, infants and within hospitals and military barracks.

⁴Reed, Catherine, Michael Macdonald, and David McGuire. January 1999. "Public/Commercial Partnership For Sustainable Marketing of ITMs: Draft Proposal Marketing Plan for Review by Ghana ITM Task Force", PATH-Canada and BASICS: Accra, Ghana.

11.4.2 Media

The market for nets in Ghana is just starting to build through advertising and awareness. During the research trip, advertisements for nets and insecticide could be found in one major newspaper (Graphic). The ads were placed by Huge, the rep for Bayer in Ghana. The nets they were advertising were Siam Dutch.

11.5 Demographics

The total Population of Ghana in a 1984 census was 12,296,081. The 1996 estimated population is 17,698,271.

Population of main urban areas:

Accra:	1,687,000
Kumasi:	480,000 (1995 est.)
Tema:	215,000(1995 est.)
Tamale:	175,000 (1995 est)
Sekondi:	124,000 (1995 est)

Total population of five main urban areas is approximately 2,681,000. This is 15.15% of the total population.

12.0 SENEGAL - Socio-Political

12.1 Introduction

Location: Western Africa, bordering the North Atlantic Ocean, between Guinea-Bissau and Mauritania

Land Boundaries: The Gambia, Guinea, Guinea-Bissau, Mali, Mauritania

Coast: North Atlantic Ocean

Climate: tropical; hot, humid; rainy season (May to November) has strong southeast winds; dry season (December to April) dominated by hot, dry, harmattan wind

Elevation Extremes:

lowest point: Atlantic Ocean 0 m

highest point: unnamed location in the Futa Jaldon foothills 581 m

Terrain: generally low, rolling, plains rising to foothills in southeast

Environment - current issues: wildlife populations threatened by poaching; deforestation; overgrazing; soil erosion; desertification; overfishing

12.2 Political

12.2.1 Government

Independence: April 4, 1960 from France; complete independence was achieved upon dissolution of federation with Mali on August 20, 1960 (The Gambia and Senegal

signed an agreement on December 12, 1981 that called for the creation of a loose confederation to be known as Senegambia, but the agreement was dissolved on September 30, 1989)

Type of Government: republic under multiparty democratic rule

National Capital: Dakar

Other major towns: Saint Louis, Thies, Kaolack

Administrative Divisions: 10 regions; Dakar, Diourbel, Fatick, Kaolack, Kolda, Louga, Saint-Louis, Tambacounda, Thies, Ziguinchor

Constitution: March 3, 1963, revised 1991

Executive Branch:

chief of state: President Abdou DIOUF (since January 1 1981)

head of government: Prime Minister Habib THIAM (since April 7, 1991)

cabinet: Council of Ministers appointed by the prime minister in consultation with the president

elections: president elected by popular vote for a seven-year term; elections last held February 21, 1993 (next to be held February 2000); prime minister appointed by the president

Legislative Branch: unicameral National Assembly or Assemblée Nationale (140 seats; members are elected by direct popular vote to serve five-year terms)

elections: last held May 24, 1998 (next to be held May 2003)

Political Parties:

African Party for Democracy and Socialism (And-Jef/PADS), Democratic League-Labor Party Movement (LP-MPT), Democratic and Patriotic Convention (CDP Garab-Gi), Independent Labor Party (PIT), National Democratic Rally (RND), Senegalese Democratic Party (PDS), Senegalese Democratic Party-Renewal (PDS-R), Senegalese Democratic Union-Renewal (UDS-R), Socialist Party (PS), other small parties

12.2.2 Present Conflict/Instability

Ongoing conflict over independence of Casamance, the Southern part of Senegal separated from the rest of the country by the river and the mini-state of the Gambia. Conflict originally between the Mouvement des Forces Democratiques de Casamance (MFDC) and the Senegalese government but now involving various faction groups and affecting surrounding countries of The Gambia, Mauritania, and Guinea-Bissau.

Short section of boundary with The Gambia is indefinite.

12.3 Economy

Overview:

In January 1994, Senegal undertook a bold and ambitious economic reform program with the support of the international donor community. This reform began with a 50% devaluation of Senegal's currency, the CFA franc, which is at a fixed rate to the French franc. Government price controls and subsidies have been steadily dismantled. After seeing its economy contract by 2.1% in 1993, Senegal made an important turnaround, due to the reform program, with real growth in GDP of 5.6% in 1996 and 4.7% in 1997. Annual inflation has been pushed below 3% and the fiscal deficit has been cut to less than 1.5% of GDP. Investment has been steadily rising from 13.8% of GDP in 1993 to 16.5% in 1997. As a member of the West African Economic and Monetary Union (UEMOA), Senegal is working toward greater regional integration with a unified external tariff. Senegal also realized full Internet connectivity in 1996, creating a mini-boom in information.

12.3.1 General Statistics

Population	9,723,149 (July 1998 est.)
Population Growth Rate	3.33 % (1998 est.)
Age Structure:	<i>0-14 years: 48%</i> <i>15-64 years: 49%</i> <i>65 years and over: 3%</i>
Infant Mortality Rate	61.27 deaths/1000 live births (1998 est.)
Life Expectancy at Birth	<i>male: 54.55 years</i> <i>female: 60.28 years (1998 est.)</i>
Total Fertility Rate	6.18 children born/woman (1998 est.)
Literacy Rate	<i>total population: 33.1%</i> <i>male: 46%</i> <i>female: 23.2% (1995 est.)</i>
Languages	French (official), Wolof, Pulaar, Diola, Mandingo

12.3.2 Economic Indicators

GDP (\$US million)	6,277 (1992)
GDP growth (%)	1.6 (1996 est.)
GDP/head (\$US)	**
Inflation (%)	2.5 (1997 est.)
Unemployment Rate (%)	NA; urban youth 40%

Budget	<i>revenues: \$885 million</i> <i>expenditures: \$885 million, including capital expenditures of \$125 million (1996 est.)</i>
Foreign Debt (US\$ billion)	3.7 (1996)
Currency	1 Communaute Financiere Africaine (CFAF) = 100 centimes
Exchange Rate (official): CFA francs (CFAF) per US\$1	608.36 (January 1998)

12.3.3 Industries & Natural Resources

Industries: agricultural and fish processing, phosphate mining, fertilizer production, petroleum refining, construction materials

Natural Resources: fish, phosphates, iron

Agriculture – products: peanuts, millet, corn, sorghum, rice, cotton, tomatoes, green vegetables; cattle, poultry, pigs; fish

12.3.4 Trade

Exports

total value: \$986 million (f.o.b., 1996 est.)

commodities: fish, ground nuts (peanuts), petroleum products, phosphates, cotton

partners: France, other EU countries, Cote d'Ivoire, Mali

Imports

total value: \$1.4 billion (f.o.b., 1996 est.)

commodities: food and beverages, consumer goods, capital goods, petroleum products

partners: France 3-%, other EU countries, Nigeria, Cameroon, Cote d'Ivoire, Algeria, China, Japan

13.0 ITN MARKET IN SENEGAL

Coordination of the malaria programming in Senegal is done mainly through the National Service Department for Large Endemics, Ministry of Health.

In keeping with a common theme for ITN use and marketing in Africa, the major obstacles in promotion of ITNs in Senegal include lack of public awareness, low availability of product in the market and the lack of a clear agenda by health authorities. With a limited tradition of mosquito net usage in Senegal, relatively few people in Dakar were aware of ITNs or where they might purchase one. This lack of awareness exists, in spite of the fact that Dakar has been identified as one of the most malaria affected regions of Senegal. Further, while there are many Dakar based organizations such as the MOH and WHO, which are involved in malaria prevention and aware of the benefits of ITNs, there is very minimal ITN commercial activity.

13.1 Supply Issues

13.1.1 Production and Distribution

13.1.1.1 Nets

- No manufacturing in-country
- Nets are imported from: Pakistan; other parts of Africa or Asia
- Two types of imported net fabric are found in Dakar: cotton and polyester.
- Distribution is by: Ets Zouhair Rammal.
- Nets are produced in very limited quantity by local tailors, co-operatives of women, etc.
- However, it should be noted that Senegal is producer of modest quantity of cotton and has textile industry that could be a potential producer of net fabric.

13.1.1.2 Insecticide

- No manufacturer of insecticide designed for net use in-country.
- Importation by: AgrEvo (main importer of insecticide for use in ITNs); Agrodiss; American Cyanamid; Bayer; Chemdol; Rhone Poulenc; Siam Dutch; Zeneca
- Local chemical industries are: CHIMIE Afrique; LOCUSTOX; SENCHIM; SPIA; VALDAFRIC, etc.
- The possibility exists for these chemical companies to work together with other local pharmaceutical industries such as PARK DAVIS, LABOREX, COPHASE, SIPOA in order to produce insecticide suited for net treatment.

13.1.1.3 ITNs

- Senegal has 50 centres where ITN impregnation, production and/or net distribution occurs (or is planned). These centres are located in 12 districts under control of Ministry of Health. The capital city, Dakar and the surrounding areas for instance, are serviced by the districts of M'Bao and Pikine, both located at 50 to 100 km from Dakar. In order to buy treated nets, one must travel to these centres. Some within the Ministry of Health seem to believe that the insecticide used for ITN is a toxic product and that health workers dealing with ITNs need extensive, special training. The production of ITNs is, so far, done with the collaboration of AgrEvo as supplier of insecticide and Zouhair Rammal as importer and supplier of net materials.
- At moment, the insecticide used for treatment is in bulk liquid form and is generally sold by the litre. AgrEvo is considering producing, or importing the individual tablet form.

13.1.2 Trade Barriers

- Ministry of Finance officials seemed unclear on the exact classification of nets and insecticide. None of the importers interviewed could provide the exact taxes/tariffs applied to nets or insecticide. Ministry of Health claims to be negotiating with Ministry of Finance to have taxes exonerated on nets and

insecticide. Tariff rates of 60% were suggested but no classification number could be provided.

13.2 Current Market

13.2.1 Local Market

13.2.1.1 Nets

- Nets are produced locally by small tailors, but quality and materials vary greatly.
- Main clients for the locally produced nets include NGOs, retailers, etc.
- Net material is mostly imported by Rammal.
- Nets are also imported, ready made, from Asia. (Siam Dutch?)
- Health Ministry figures⁵ suggest that nets are sold in most small retail shops (45.6%), tailors (22.9%) and by street vendors (19.4%).
- The retail price is CFA 5000-10000 (\$8-16).
- It is estimated that 80% of nets are bought by women.

13.2.1.2 Insecticide

- Insecticide can be found in the drug stores and among agriculture products distributors.
- Insecticide used for ITNs is imported mainly by AgrEvo.

13.2.1.3 ITNs

- Pre-treated nets cannot be found anywhere in Dakar. They are produced and sold in M'Bao district (50 km from Dakar).
- These nets are being sold at subsidised prices by NGOs.

Note: Retailers seemed quite reluctant to provide accurate sales information. This reluctance may be related to avoiding potential tax liabilities or perhaps a desire to keep information from the competition.

13.2.2 NGO Market

- World Vision and Japanese Cooperation are the two organizations presently involved in ITN promotion and distribution, through their own projects.
- More NGOs suggest that they are considering ITN programming once there is availability of the product and a good campaign.
- NGOs sell ITNs at subsidised prices of \$4.25-\$5.00 or F CFA 2500-3000.
- NGOs are targeting rural areas or low income sectors (ie. women).
- Even with subsidized prices, customers (women) do not pay the full amount; they pay in installments.
- The BASICS Senegal office is not directly involved with ITN matters; these are being handled by the BASICS USA office as the main contact with the Ministry of Health (MOH).

⁵ Research on Nets and Insecticide for the Ministry of Health Senegal. Institut de Recherches et d'investigation par Sondage (IRIS)

13.3 Marketing

13.3.1 Companies

- None of the companies visited has a marketing campaign in place except for the marketing strategy put together by Ministry of Health (MOH) with the funding from WHO. The MOH has conducted two studies (in November 1998 and in March 1999) that focussed on market research and a plan of action for marketing ITNs.
- No generic public awareness for ITNs has been done by the MOH.

13.3.2 Ministry of Health (MOH)

- The MOH is currently focussing resources and awareness on the use of chloroquine.
- The MOH has benefited from funding of \$332,505 from World Health Organization (WHO), which has allowed them to sponsor two studies: an ITN market study (1994), and an ITN marketing plan (March 1999). At this point the Ministry of Health is looking for ways to implement the plan of action proposed in ITN strategic plan document.
- The government is planning to launch an ITN campaign but would prefer the private sector to do it.
- The government, including the President's office, is committed to fighting malaria and are willing to support any initiative taken in this direction.

13.4 Knowledge of ITNs

13.4.1 Public

- People in the street do not know much about ITNs, except for people directly involved with MOH, NGOs, suppliers, hotels, etc.

13.4.2 Media

- Nothing related to nets or insecticide appeared in the Media.

13.5 Past History of Malaria Prevention

- In the past, the MOH has put more emphasis on use of chloroquine than in other strategies.
- Other methods used widely are: repulsives, serpentines, retail insecticides, nets, fans. 'Repulsives' used are essentially made up of tree leaves (such as eucalyptus) and bark.
- MOH figures suggest that among the malaria prevention methods used, nets (31.8%) are the fourth most popular method, behind repulsives, serpentines, and insecticides.
- MOH studies show that 33.8% of the population in urban areas and 29.4 % of the population in rural areas see nets as one of the ways to protect themselves against malaria.⁶
- Regions heavily affected by mosquitos tend to use more nets than other region.
- According to a survey done by Group IRIS, on behalf of the Ministry of Health, 80.4%

⁶ Research on Nets and Insecticide for the Ministry of Health Senegal. Institut de Recherches et d'investigation par Sondage (IRIS)

of households do understand that nets protect against mosquitos. The study also suggested that people recognise the benefits of nets as protection against other things such as flies, insects and dust. However, 17.7% of households surveyed questioned the efficacy of the net. They argued that a net is used at a specific time (evening) and in a specific area of the house (bedroom), which limits its role of protection against mosquitos and therefore malaria. They argued that in the evening people tend to socialize outside, thus exposing themselves to the mosquitos.

- The same study indicated the following various perceptions of ITNs among the urban population:
 - net is cumbersome (32.4%)
 - net is difficult to install (30%)
 - nets make the bedroom look ugly (42%)

13.5.1 History of Net Use

- According to a market study by the MGP-Afrique firm for the MOH (March 1999), out of an estimated 1,125,000 households in Senegal, only 240,000 use nets. Of the households using nets, each household uses an average of 3.57 nets which suggests a total estimated current market of 850,000 nets. (This seems high given the lack of nets in the marketplace). The highest levels of net users are in the region of Saint-Louis followed by Dakar.

13.6 Demographics

Population of main urban areas:

Dakar	1,986,000 (1995)
Thies	216,381 (1994)
Kaolack	193,115 (1994)
Ziguinchor	161,680 (1994)
St. Louis	132,499 (1994)

Total 2,689,675 or 28% of the total population (9,403,546) (1997)

14.0 KENYA

Although Kenya is not one of the focus countries for this project, it is here that all of the agrochemical/insecticide companies have their regional offices. This is, therefore, where product development, pricing, distribution, and overall market strategies for Tanzania and Uganda are planned. There are also large net manufacturers and distributors based in Nairobi, and significant NGO projects doing research and distribution of ITNs.

14.1 Insecticide Manufacturers

14.1.1 AgrEvo (EA) Ltd.

- AgrEvo's response to the issue of awareness building has been to invest resources into education and training materials. This is seen as being a more integrated approach to the marketing of their product and is hoped to create a public image of AgrEvo as a partner in health education and prevention.
- In this regard, AgrEvo has developed training guides ('AgrEvo -Guide to Treatment of ITMs'), flip-charts, and various promotional items (ie. calendars,

poster, pens, etc) with information on the K-O tab. Training, teaching guides, and follow-ups are planned through District Health Offices (Kenya) and also through NGOs. Forty training guides are designated per country so far. Other training is provided on residual spraying, fogging, and larvicide.

- A major strategy is to develop partnerships with the donor community to sustain the role of educating communities. Also, it is recognized that the moral reputation of NGOs can benefit the private sector because people often trust NGOs to give a good and fair price. Thus, subsidies must generally be discouraged.
- ITN distribution is not done through the existing agrochemical distribution channels. It is mainly done through the appointment of specific distributors, in particular those distributors of the 'Doom' product. AgrEvo seeks to appoint a maximum of 3 traders/country who sell a variety of commodities and do mobile van sales. Marketing is mainly targeted at wholesalers, NGOs, and ministries.
- Local advertisements include the location of K-O tab distribution points, while posters are used in pharmacies, chemists and supermarkets. They attempt to convey the consistent "tag-line" message; "Fight Malaria with K-O Tab".
- AgrEvo also packages Siam Dutch nets with K-O tab and has branded it 'K-O Net' in East Africa, 'EcoNet' in Zimbabwe and Rwanda.
- There is no AgrEvo in Uganda yet. Plans are to distribute there through a Kenyan Asian businessman who already manufactures coils and aerosol and has his own sales reps.
- There is no direct distribution yet in Tanzania. The focus has mainly been on agrochemical business.
- K-O tab launches are planned for Uganda in late September of 1999 and in Tanzania at the October international ITN Conference.
- Product prices: - \$36.30/L, retails at \$45.90 (66 nets/6 mth coverage or 40 nets/1 yr coverage).
- Duty on insecticide: Kenya - 5%, Uganda - 5 %, Tanzania - no duty
- Nets in Kenya are generally priced between \$4.50-\$6.00.
- AgrEvo believes that education is the key to justifying what many feel is a high price.

14.1.2 Bayer (EA) Ltd.

- Bayer currently has only a bottled, liquid formula for ITNs (SOLFAC), which is not packaged for easy, individual treatment or distribution. Thus, mainly larger quantities are marketed.
- The target market is AMREF and UNICEF (other NGOs and for institutional use).
- Distribution network involves the use of salesmen who travel by local mini-buses to distribution points. A network of distributors with vans are also used. These distributors then supply local supermarkets and wholesalers, who then supply retailers and micro supermarkets. In the Coast Province, a network of pharmacies is used for distribution.
- Product price: \$2.60/20 ml (KSh160). Any amount can be packaged as required.
- A major marketing issue relates to price, not wanting to subsidize, and the need for education of the public regarding relative costs of malaria control methods.
- Advertising is done through promotional companies ('Insta Promotions'), radio,

- TV, newspapers (though fairly expensive), and metal poster on storefronts.
- Malaria control falls under two sections of the company: Consumer Care (products such as coils and repellants, etc.) and Environmental Health, which comes under the Animal Health section (carries SOLFAC, the ITN product). The Consumer Care section has the biggest budget and spends 20% of budget on advertising. The environmental Health section spends 7% of its budget on advertising.
- Bayer has agents in Uganda and Tanzania.

14.1.3 Cyanamid (EA) Ltd.

- A single treatment package is soon to be introduced onto the market, at a more competitive price (\$.45-\$.50). If successful, competition will increase and other companies may follow suit.
- Marketing strategies have mainly been through net manufacturers and through NGO/Government tenders.
- Distribution has mainly been through MEDS over the last several months, although some distribution has been through Pest Control Operators, and large labour camps (ie. Tea Estates, etc.). Cyanamid agricultural products are distributed through a network of wholesalers and chemical retailers.
- Bulk net treatments are mainly distributed to large farmers, stockists, and other wholesalers.
- 10 tons of Fendona/yr is presently sold for residual spraying.
- There is a keen interest in accessing market information on ITNs.

14.1.4 Zeneca (EA) Ltd.

- Zeneca provided a general overview to ITNs in the region, and their own involvement in the market. In Kenya, the present focus of the government is on highland areas with epidemics, and on the coastal and Lake Kisumu areas. It was suggested that although nets are manufactured in Kenya, they tend to be exported and therefore there is a lack of local supply. In Tanzania, main activities involve residual spraying. In Uganda it was suggested that NGOs have limited reach and that the MOH is the driving force. There is a focus on residual spraying in epidemic areas but, otherwise, net treatment is the focus. Zeneca distributes through Twiga Chems., a stockist which has money and distribution channels while Zeneca provides the training and expertise. They are working with the Uganda MOH to try to source financing for promotions.
- At present, the Public Health section is 5% of the total business volume but it occupies 25% of the time.
- It is believed that there is no significant retail demand at the present time. However, Zeneca will consider co-financing for proposals for creating a demand creation program.
- The price of ICONET (liquid form) is \$1.50 (wholesale), \$2.00 (retail) but it is not yet being widely retailed. For bulk uses, the Community Pack results in prices of \$.50/net (wholesaler) or \$.70/net (to user).
- Zeneca will not support the tablet form of insecticide because of safety issues. There is a keen awareness of the 'Green' (environmental) pressure on chemical

companies.

15.0 SUMMARY

Certain common themes appear in the surveys done of both the private and public sectors, of manufacturers, distributors, NGOs, and various government ministries. These themes have implications for how the ITN market develops in the next few years in Africa. Discussing and addressing these issues and ideas is critical to the next stage of developing strategies for actively creating, growing, and supplying the ITN market in these countries.

Some of the themes and key points are summarized as follows:

- Promoting ITNS:
 - Nets and insecticide are two completely different products, from different manufacturing sectors, which therefore may require different marketing approaches.
 - However,*
 - It is recognized that awareness creates demand.
 - It is also recognized that a massive promotional effort is required to build the ITN market.
 - This promotion needs to happen on all levels, from Ministry of Health and NGOs (IEC materials) to manufacturers and distributors (media advertising).
 - Education/awareness building must include basic facts on malaria/ITNs, on ITNs as an effective response to the problem and finally on effective use of ITNs.
 - Promotion efforts must be repeated and ongoing, with the major blitz occurring when malaria season begins and during the harvest season when money is available.
 - Significant financial resources must therefore be allocated for promotion and advertising
- Partnerships:
 - There is increasing opportunity for synergistic relationships to develop between various businesses, between business and NGOs, and between government ministries and the public and private sector.
 - Initial evidence of this appears in tentative partnerships between net manufacturing companies and insecticide companies but there is room for further developments.
 - Such partnerships offer opportunities to further develop distribution channels and education/promotional campaigns.
- Taxes/Tariffs:
 - Import taxes, particularly on raw materials and nets, create a major disincentive for businesses and potential investors by inflating the cost of nets.
 - There is need for ongoing, concerted pressure from the donor/NGO level to bring change at a government policy level.
 - The private sector can also enter the debate through strategic sensitizing of policy makers.
 - If ongoing tariff relief is not possible, it has been suggested that a tax holiday for a few years may provide the incentive for investment and allow the market to develop.
- Pricing/Subsidization:
 - There is significant concern that the price subsidies are undermining the commercial ITN market. (This also applies to the branding of locally produced products). Net companies in

particular have expressed frustration at having to compete with subsidies.

- By lowering the selling price, subsidies create a disincentive for private sector investment in market development.
- In fact, as long as NGOs and governments are in the business of distributing ITNs, the private sector will continue to focus on NGOs and governments as customers rather than spend the time and money necessary to develop markets among the general public.
- Increased demand and competition among insecticide companies will need to become more widespread before consumers can expect much lower prices for insecticide.
- There is need for education among NGOs and governments regarding the effect of subsidized projects on the overall ITN market.

In summary, in order to successfully market ITNs in sub-Saharan Africa, it is going to take an aggressive awareness campaign and widespread availability of product on the market. An obvious first step is to make people aware of ITNs and their importance through a combination of aggressive generic marketing and multi-media brand advertising. Secondly, product must be available where people can buy it. Advertising campaigns should direct people to locations where they can find the products. Thirdly, pricing must be attractive. Lower prices will occur in the marketplace naturally if demand is sufficient to ensure real competition and if governments reduce taxes.

It is proposed that the formation of an ITN industry association is the most appropriate strategy for promoting increased supply and demand of ITNs. An industry association would provide member businesses with a forum through which to meet, exchange ideas and initiate strategies for the promotion and marketing of ITNs. It would also seek funding to pursue private sector and truly sustainable marketing campaigns directed at final consumers rather than at NGOs and government agencies.

References

Socio- Economic statistics taken from:

CIA World Factbook 1998. <http://www.odci.gov/cia/publications/factbook>

Mbendi Country Profiles. <http://mbendi.co.za/cyaf.htm>

Microsoft Encarta Virtual Globe 99, Microsoft, Washington USA.

Uganda Manufacturers Association. <http://www.uganda.co.ug/uma.htm>

Uganda: The Pearl of Africa. <http://www.uganda.co.ug/home.htm>

ITN INFORMATION REQUIREMENTS

AREA OF CONCERN	SPECIFIC QUESTIONS	SOURCE OF INFO	CONTACT
<p>Supply Issues:</p> <p>1. Production (to manufacture in-country or to import)</p>	<ul style="list-style-type: none"> - Who is making/distributing nets & insecticide? - Is insecticide imported? manufactured in-country? mixed and packaged in-country? - Are nets imported? assembled/sewn? - Is netting fabric produced in-country? - How much insecticide is produced? - How many nets are produced? - (production capacity - volume produced/yr) - Where is the factory located? 	<ul style="list-style-type: none"> - Net Gain Catalogue (pre-trip) - Chamber of Commerce - Ministry of Industry/Commerce - Companies 	
<p>2. Distribution/Logistics</p>	<ul style="list-style-type: none"> - What regions are you selling to? - What area(s) can you not get to? Why? - What are your channels of distribution? (selling to wholesalers or retailers?) - How do you find your distributors? 	<ul style="list-style-type: none"> - Companies 	
<p>3. Trade Barriers</p>	<ul style="list-style-type: none"> - What taxes/tariffs apply to nets/insecticide? - What is the tariff classification (#)? 	<ul style="list-style-type: none"> - Ministry of Trade/Finance - Freight Forwarder/Clearing Agent - Customs Office 	

<p>Current Market:</p> <p>1. Local Market (Location/Price/Type)</p>	<p>Action:</p> <ul style="list-style-type: none"> - Send someone to different part of city to buy net at best price and bring back (specify net) - Label net (where bought/when/price) <p>Ask Customer:</p> <ul style="list-style-type: none"> - Where can I buy nets? insecticide? ITNs? (Both wholesale and retail) - For how much? <p>Ask Retailer:</p> <ul style="list-style-type: none"> - Do you sell both nets and insecticide? - What kinds of nets do you sell? (adult/baby) - What types of insecticide do you sell? - Do you sell both nets and insecticide? - Do customers buy insecticide with the nets? how often? - Who made the nets? - Who made the insecticide? - From whom/where did you buy nets? insecticide?(manufacturer, trader, mid-person) - Can you provide the specific contact of trader (for manufacturer to be able to contact) - What names/labels are the nets/insecticide marketed under? - Who mostly buys nets/insecticide? (men/women) - what %? 	<p>- Local Shops/Market Place</p>	
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<p>Knowledge of ITNs and Benefits</p>	<p>Activity: - Observe presence of topic/related info in local media sources</p> <p>Ask Media: - Do you know about ITNs? - Have you been approached to do any advertising on ITNs? How often?</p> <p>Ask Local People: - Do you know about ITNs? - How do you know about ITNs? - Where did you hear about ITNs?</p>	<p>- Local Media (TV, Newspapers, radio, billboards) - Local population - Previous studies (?)</p>	
<p>* Past History of Malaria Prevention</p>	<p>- Were there malaria prevention methods used in the past? - What were these methods? - Were/are there traditional methods used? - if so, what are these? - Is there significant evidence of previous history of net use? - (Lessons Learned - mortality trial rates, subsidies, net retreatment rates)</p>	<p>- Katie - NGOs - Min. of Health - Civil Servants - Previous Studies</p>	
<p>Demographics</p>	<p>- What are the 5 main cities? - What % of the population lives in the 5 main cities?</p>	<p>- Computer Program/Internet</p>	

* In-depth, country specific market study necessary for more thorough information

ZAMBIAN CONTACTS:

Appendix 2(a)

NGO	CONTACT	ADDRESS	PHONE/FAX	EMAIL
CARE Zambia	Fredah Changwe (Project Manager- Infant and Child Mortality Reduction Project - ICMRP)	P.O. Box 36238 Lusaka Plot 3020 Mosi-O-Tunya Rd., Woodlands Shopping Complex	Tel: (260-1) 265901/08 Fax: (260-1) 265060	changwe@zm.care.org
Churches Medical Association of Zambia (CMAZ)	Dr. Simon Mphuka (Health Programs Manager) Rosemary Kabwe (Project Officer)	Ben Bella Road P.O. Box 34511 Lusaka	Tel: (260-1) 229702 237328 Mobile: (Mphuka) 752136 Fax: (260-1) 223297	cmaz@zamnet.zm
Society for Family Health (SFH/PSI)	Brad Lucas (Executive Director) Chris Mukkuli (Child Health Specialist)	P.O. Box 50070 Lusaka	Tel: (260-1) 292443 Fax: (260-1) 292463	sfh@zamnet.zm
UNICEF	Christiane Rupert-Thorpe (Project Officer, Child Health)	P.O. Box 33610 Lusaka UN Building Alick Nkhata Rd.	Tel: (260-1) 255144 252430 Mobile: 773015 Fax: (260-1) 253389	crudert@unicef.zm unicef@zamnet.zm
WHO/AFRO	Nora Mwenba Dr. Banda (Geneva)	Lottie Hse P.O. Box 32346 Lusaka	Tel: (260-1) 223251/3 221318 238505 Fax: (260-1) 223209	

COMPANY	CONTACT	ADDRESS	PHONE/FAX	EMAIL
<p>Chemdol (Zambia) Ltd. Chemdol South Africa</p>	<p>Godwin Mulenga Eric Chipili Guy Williams, Director</p>	<p>P.O. Box 33325 Lusaka P.O. Box 890 Petervale 2151</p>	<p>Tel: (260-1) 272793 Fax: (260-1) 272840 Tel: +27 (11) 706 7273 Fax: +27 (11) 706 5465</p>	<p>chemdol@zamnet.zm Web site: http://chemdol.hypermart.net</p>
<p>CYANAMID Zambia Ltd. Cyanamid Zimbabwe (Private) Ltd.</p>	<p>Dr. George Banda (Business Development Manager/Non-Crop) Fortune Charles Muraha, (Public Health/Non-Crop Officer)</p>	<p>Lumumba Road P.O. Box 31994, Lusaka P.O. Box UA 414 Union Avenue Union Avenue, 20 Austin Road, Workington, Harare</p>	<p>Tel: (260-1) 225963 220774/5 Fax: (260-1) 220612 Tel: (263-4) 620-244 Fax: (263-4) 620-245</p>	
<p>Eco Med Zambia Ltd.</p>	<p>Martin Mitchell (Managing Director) Chilando G. Mutiti (Manager, Environmental Health Dept.)</p>	<p>P.O. Box 31826 Lusaka Stand 8627 Off Lumumba Rd. (South End)</p>	<p>Tel: (260-1) 289558, 233497 Mobile: 758748/9 Fax: (260-1) 286827</p>	<p>ecommedza@zamnet.co.zm</p>

Emnet (Pvt) Ltd.	Peter Carroll (Director)	P. O. Box GD520 Greensdale, Harare Zimbabwe Bay 10 Cavan Industrial Park 152 Mutare Rd, Beverley East, Harare	Tel: (263-4) 480529, 480258, 498142, 498143, 498310 Fax: (263-4) 487051 486860	http://www.unicc.org/untpdc/incubator/zwe/iphar/htm
MALVEC CC Public Health Control Consultancy	Graham Kloke (runs Zambia marketing program for AgroEvo)	20 Melmoth Road, Eshowe, 3815, S.A.	Tel: (0354) 74050 Int: (27-354) 74050	
MACMED Health Care Zambia Limited	Francis Mpulamasaka (Divisional Manager - Animal Health & Bio-Security)	P. O. Box 31162 Lusaka Corner of Lumumba/Buyantashi Rd.	Tel: (260-1) 246077, 246219, 243637 Direct: (260-1) 242204 Fax: (260-1) 242150	ahs@zamnet.zm
Sangiene Chemicals (Z) Limited	Humphrey Mwaba (Operations Manager)	P. O. Box 35878 Lusaka Sulmach Buildings, Show Grounds	Tel/Fax: (260-1) 252947 Direct: (260-1) 254895	
Zeneca Agrochemicals	Nan Chalmers, (Regional Health Manager)	P. O. Box 1088, Harare	Tel: (263-4) 660- 495/6 Fax: (263-4) 663-599	nanc@zeneca.sni.co.zw

GOVERNMENT OFFICE	CONTACT	ADDRESS	PHONE/FAX	EMAIL
Customized Clearing and Forwarding (Freight Forwarder)			Tel: (260-1) 247621/22	
Central Board of Health (Ministry of Health)	Dr. Gavin Silwamba (Director - Health Systems Development)	P.O. Box 32588 Ndeke House, Lusaka	Tel: (260-1) 253179/80/81/82 Fax: (260-1) 253173	hritsilw@zamnet.zm
Ministry of Finance		Ministerial Exchange P.O. Box RW50062 Lusaka	Tel: (260-1) 250544 250923	
National Malaria Control Centre (NMCC)	John Chimumbwa Simon Nkunika (Parasitology) Wambuji Kapelwa (Emidemiology)	Chinama Hills Hospital Lusaka	Tel: (260-1) 282455	
Zambia National Broadcasting Corporation	Evans Sinkala (Sales Clerk)	Broadcasting House P.O. Box 50015 Lusaka	Tel: (260-1) 252005 Fax: (260-1) 254013	
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GHANA CONTACTS:

Appendix 2(b)

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UNICEF	Ernestina Agyepong Programme Officer	P.O. Box 5051 Accra North 4 - 8 th Rangoon Close, Accra, Ghana	Tel: (233-21) 772524 / 777972 Fax: (233-21) 773147	eagyepon@unicef.org
World Health Organization	Sophia Twum-Barima (Health Information and Promotions Officer)	P.O. Box MB 142, Accra 29 Volta Street Airport Res, Accra	Tel: (233-21 763918/19) Fax: (233-210763920)	stbarima@whoghana.org
USAID	Kirk Lazell, Senior Technical Adviser	Accra, Ghana	Tel: (233-21 228- 440/467) Fax: (233-21 231-937	klazell@usaid.gov
COMPANY	CONTACT	ADDRESS	PHONE/FAX	EMAIL
Agri-Mat Ltd.	R. Nana Yaw Obeng Director	P.O. Box 15097 Accra - North0 151 Motorway Road Abeka-lapaz, Accra.	Tel: (233-21) 222912/ 235674 Fax: (233-21) 234628	agrimat@africaonline.com
CHEMICO Ltd.	Winfred Tse Managing Director	P.O. Box 950, Tema, Ghana Community 1 Industrial Area Tema, Ghana	Tel: (233-22) 202991/202345 Fax: (233-22 202000	

Huge Ltd.	A Yaw Berko (Managing Director)	P.O. Box 13534 Accra, Ghana	Tel: (233-21) 228091 232171 Fax: (233 21) 228091	yaw@ncs.com.gh
S.C. Johnson Wax	Ladi Nylander Managing Director	P.O. Box C537 Cantonments, Accra. Ghana	Tel: (233-21) 766192/ 766242 Fax: (233-21) 664432	scjwaxgh@ncs.com.gh
J & Z Industries (textile)	Adel Shami General Manager	P.O. Box 18130 Accra, Ghana	Tel: (233-21) 303071/2 Fax: (233-21) 766070	
Strategic Communications	Kwasi Opoku- Amankwa Chief Communications Executive	P.O. Box 149 Trade Fair La, Accra, Ghana	Tel: (233-21) 760748 / 770332 Fax: (233-21) 761719	stratcomm@ghana.org
GOVERNMENT	CONTACT	ADDRESS	PHONE/FAX	EMAIL
CIDA Canadian High Commission	Rhonda Gossen	42 Independence Avenue, P.O. Box 1639 Accra, Ghana	Tel: (233-21) 228555/ 773791 Fax (233-21) 773792	rohnda.gossen@accra01.x400.gc.ca

UGANDA CONTACTS:

Appendix 2(c)

NGO	CONTACT	ADDRESS	PHONE/FAX	EMAIL
AMREF Uganda	Peter Ngatia (Country Director)	<i>Contact Address:</i> P.O. Box 10663 Kampala, Uganda <i>Physical Address:</i> Plot 17 Nakasero Rd.	Tel: 256-41-250319 344579 Fax: 256-41-244565	amrefug@imul.com
Canadian Physicians for Aid and Relief (CPAR)	Gizaw Shibru (Country Director)	P.O. Box 7504 Kampala	Tel: (256-41) 268064 Mobile: 075-710930 Fax: (256-41) 267669	cpar@imul.com
Christian Children's Fund Inc.	Dr. David Serukka (Program Officer - Health)	P.O. Box 3341 Kampala Plot 71/72 Namirembe Rd.	Tel: (256-41) 270544 Fax: (256-41) 345353	ccf@imul.com
International Committee of the Red Cross	Dr. Paivi Laurila (Health and Relief Co-ordinator)	P.O. Box 4442 Kampala Plot 8 Acacia Ave.	Tel: (256-41) 230517, 232450, 232099, 250211 Fax: (256-41) 341298	assist.kam@icrc.org

<p>Plan International - Uganda</p>	<p>Dr. Noah Lukoda (Country Health Advisor)</p> <p>Justice Miller (Procurement Officer)</p>	<p>P.O. Box 12075 Kampala</p> <p>Plot 126 Luthuli Ave., Bugolobi</p>	<p>Tel: (256-41) 221495 220278</p> <p>Mobile: 077-412577</p> <p>Fax: (256-41) 221497</p> <p>Mobile: 077-403308</p>	<p>lukodan@plan.geis.com</p>
<p>WHO/AFRO</p>	<p>Dr. Edith Lyimo (Entomologist - Sub Regional Office)</p> <p>Dr. Josephine Nambooze (Disease Prevention and Control Advisor)</p>	<p>P.O. Box 24578 Kampala</p> <p>Plot 4 Nile Ave. 1st Fl, East African Development Bank Bldg</p>	<p>Tel: (256-41) 344038/58</p> <p>Mobile: 075-644122</p> <p>Fax: (256-41) 344059</p>	<p>Elyimo@who.imul.com</p> <p>Nambooze@who.imul.com</p>
<p>WORLD VISION</p>	<p>Stewart Katwikirize (Programme Officer - Relief)</p>	<p>P.O. Box 5319 Kampala</p> <p>Plot 15B Nakasero Rd.</p>	<p>Tel: (256-41) 345758, 340349, 251640/1/2</p> <p>Fax: (256-41) 258587</p>	<p>Stuart_Katwikirize@wvi.org</p>

COMPANY	CONTACT	ADDRESS	PHONE/FAX	EMAIL
Across Africa Clearing and Forwarding Ltd. (Freight Forwarder)	Richard	P.O. Box 2890 Kampala Parliament Ave. Baumann Hse (Rm 427)	Tel: (256-41) 346555 Fax: (256-41)346555	
Commercial Marketing Strategies	Peter Cowley (Director) Elizabeth Gardiner (Social Marketing Director)	P.O.Box 3495, Kampala Plot 16 Sezibwa Rd., Nakasero	Tel: (256-41) 232905 230080 Mobile (Elizabeth): 077-431911 Fax: (256-41) 258678	pcowley@infocom.co.ug emsug@infocom.co.ug
ROMEX Limited	Alex Shifferaw (Managing Director)	P.O. Box 24582, Kampala Plot 13, Daisy's Arcade, Buganda Rd.	Tel: (256-41) 349092 Fax: (256-41) 349101	romex@swiftuganda.com
The Joint Medical Stores	Ron Wehrens (Pharmacist)	P.O. Box 4501, Kampala	Tel: (256-41) 266126, 268482 Fax: (256-41) 267298	storejms@imul.com

<p>Twiga Chemical Industries (U) Limited</p>	<p>Mr. Surinder Kalsi, (General Manager)</p>	<p>P.O.Box 4800 Kampala Plot 71, Seventh St., Industrial Area Nairobi Office: P.O. Box 30172 Nairobi, Kenya View Park Towers, Uhuru Highway</p>	<p>Tel: (256-41) 257050, 259811 Fax: (256-41) 342594 Tel: (254-2) 338333 Fax: (254-2) 223167</p>	<p>twiga@swiftuganda.com</p>
<p>Verstergaard Frandsen (EA) Ltd.</p>	<p>Adbul Shafik (Sales Rep)</p>	<p>Disease Control Textiles P.O. Box 30931 Kampala Nairobi Office: P.O. Box 66889 Waiyaki Way, ABC Place Nairobi, Kenya</p>	<p>Mobile: 075-777991 Tel: (254-2) 444758/9 Fax: (254-2) 444782</p>	<p>adminkvf@form-net.com</p>

GOVERNMENT OFFICES	CONTACT	ADDRESS	PHONE/FAX	EMAIL
Ministry of Health	Dr. Peter Langi (Malaria Control Unit Manager) Mr. Michael Okia Dr. Chigongo	Malaria Control Unit Ministry of Health P.O. Box 7272 Kampala	Fax: (256-41) 340877	pco@uga.healthnet.org pco@infocom.co.ug
Ministry of Finance, Planning, and Economic Development		P.O. Box 8147 Nile Ave. Kampala	Tel: (256-41) 234700 235051/3	
Ministry of Tourism, Trade and Industry		P.O. Box 7103 7/8 Parliament Ave. Farmer's House, Kampala	Tel: (256-41) 25985, 256359, 323971 Fax: (256-41) 347286	
National Drugs Authority		P.O.Box 23096, Kampala	Fax: (256-41) 255758	nda@imul.com
National Medical Stores Corporation	Milton Kamoti (Customer and Public Relations Officer)	Plot 4-12 Wilson Rd., Medical Stores Bld, Kampala	Tel: (256-41) 320542 320507 Fax: (256-41) 321467 321062	
Uganda Revenue Authority		P.O. Box 7279 Nakawa Industrial Area Kampala	Tel: (256-41) 221723 Fax: (256-41) 221778	

TANZANIA CONTACTS:

Appendix 2(d)

NGO	CONTACT	ADDRESS	PHONE/FAX	EMAIL
AMREF (Tanzania)	Dr. Darau Bukenya (Country Director)	P.O. Box 2773 Dar es Salaam Plot1019 Ali Hassan Mwinyi Rd Dar es Salaam	Tel: (255-51) 116610, 1187, 153103, 153104 Fax: (255-51) 115823	dbukenya@africaonline.co.tz
PSI	Tim Manchester	P.O. Box 33500 Dar es Salaam Texaco Building 4 th Fl, Pamba Road	Tel: (255-51) 116312 117879 Mobile: 0812-782369 Res: 600880 Fax: (255-51) 117372	Tmanchester@Twiga.com PSI_Tnz@twiga.com
Save the Children	Joshua Kyallo (Deputy Country Program Director)	P.O. Box 10414 Dar es Salaam Plot 34 Ursino Estate, Near Tan Hse Ali Hassan Mwinyi Rd	Tel: (255-51) 760698 Mobile: 0811-325481 Fax: (255-51) 760801	SCFdar@maf.org Jkyallo@maf.org
SMITN (Social Marketing of Insecticide Treated Nets - PSI)	Dr. Jane Miller, (Project Manager)	P.O. Box 33500 Dar es Salaam Texaco Building 4 th Fl, Pamba Road	Tel: (255-51) 117372, 116312, 117879 Mobile: 0811-339715 Fax: (255-51) 117372	smitn@twiga.com
TEHIP (Tanzania Essential Health Interventions)	Dr. Don de Savigny (Research Manager)	P.O. Box 78487 Dar es Salaam	??Tel: 0811-321672 Cell: 0811-334575 new line: 130627 Freda Fax: (255-51) 112068	desavigny.tehip@twiga.com

WHO/AFRO	Dr. Ritha Njau	P.O. Box 9292 Dar es Salaam	Tel: (255-51) 111718 113005 Mobile: 0812-783734 Fax: (255-51) 113180	who-tz@twiga.com who.tanzania@undp.org
World Vision	Joel Kalagho (Assistant to Programs Director) Caroline Shao (Communications Manager)	P.O. Box 6070 Arusha AICC Bldg Serengeti Wing, 5 th Fl.	Tel: (255-57) 4359 4479 Fax: (255-57) 8248	TZA-SF-Programs@wvi.org Caroline Shao@wvi.org

COMPANY	CONTACT	ADDRESS	PHONE/FAX	EMAIL
A to Z Textile Mills Ltd.	Anuj Shah Binesh Haria	Industrial Area, P.O. Box 945 Arusha	Tel: (255-57) 3311, 2375, 8888, 8139 Fax: (255-57) 8235	azpfl@yako.habari.co.tz
Bytrade		Upanga, P.O. Box 3491 Dar-es-Salaam		
Kays Hygiene Products Ltd.	Mrs. Kay (Khadija) Simba		Tel: 0811-323-486	
Motex	Arvind Ajit Joshi (Director) **contact A to Z**	P.O. Box 251 Moshi	Tel: (255-55) 55226/7 Fax: 9255-55) 51471	
Sunflag (Tanzania) Ltd.	Arun K. Seth (General Manager) Prosper Jincen (Productions Manager)	Industrial Area P.O. Box 3123 Arusha	Tel: (255-57) 6303 3739 Direct: 8023/8721 Res: (255-57) 7271 Fax: (255-57) 8210	sunflag@eoltz.com
TMTL (Textile Manufacturers of Tanzania Ltd.)	Anthony Haji (Director of Marketing) Philip Wright	P.O. Box 1852 Dar es Salaam 163 Mbosi Road, Changombe	Tel: (255-51) 863129 Mobile: 0812-770 200 Fax: (255-51) 113273	tmtl@raha.com

GOVERNMENT OFFICES	CONTACT	ADDRESS	PHONE/FAX	EMAIL
Ministry of Health	Dr. Mwita (Coordinator National Malaria Control Program) Dr. Mandike	P.O. Box 9083 Dar es Salaam	Mobile: 0811-339713 Fax: (255-51) 23676 Mobile: 0811-624987	

KENYA CONTACTS:

Appendix 2(e)

AMREF (Headquarters/Country Office)	Anne Gichohi (Project Manager - Malaria Unit)	P.O.Box 30125 Nairobi, Kenya Wilson Airport Langata Road Nairobi, Kenya	Tel: (254-2) 501301 500508 Direct: (254-2) 606339 Fax: (254-2) 606340	Headquarters: amrefhq@africaonline.co.ke Country Office: amrefkco@africaonline.co.ke
Agrevo East Africa Ltd.	Ambrose Anguka (Business Manager)	The Chancery, Valley Rd. P.O. Box 60022 Nairobi	Tel: (254-2) 717734/5 Fax: (254-2) 712146	
Bayer East Africa Ltd.	Dr. Jacob Ong'are (Environmental & Animal Health) Peter Icharia (Product Manager/Consumer Care)	P.O. Box 30321 Nairobi Thika Rd/ Outering Rd., Ruaraka	Tel: (254-2) 803103, 860667-74 Fax: (254-2) 803345, 861636	actionpi@hotmail.com
Cyanamid - East Africa	Michael Harrold (Managing Director) Dr. Muia Malu (Export & Speciality Manager - East Africa)	P.O. Box 47341 Nairobi Shell & BP Hse., Harambee Ave.	Tel: (254-2) 336311/13 Direct: (Harrold) 225573 (Malu) 336361 Fax: (254-2) 330733	cyanamid@swifftenya.com
SiamDutch Mosquito Netting Co., Ltd.	Michael Oddenya (General Manager) Francis Muchoki (Sales Executive)	P.O. Box 41637 Nairobi Baricho Rd, Industrial Area	Tel: (254-2) 535128 555104 Fax: (254-2) 557926	siamnet@africaonline.co.ke



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Vestergaard Frandsen (EA) Ltd.	<p>Thomas Tolstrup Hansen (Regional Director - East Africa)</p> <p>Leo Niskanen (Regional Sales Manager)</p> <p>Mikkel Vestergaard Frandsen (Managing Director)</p>	<p>P.O. Box 66889 Nairobi</p> <p>ABC Place Waiyaki Way</p> <p>Head Office: Akseitorv 4B DK - 6000 Kolding Denmark</p>	<p>Tel: (254-2) 444758/59 Fax: (254-2) 444782/526</p> <p>Tel: +45 75 50 30 50 Fax: +45 75 50 30 44</p> <p>Tel: (254-2) 711261 711974 Fax: (254-2) 711361</p>	<p>tolstrupvfea@net2000ke.com</p> <p>leo@net2000ke.com</p> <p>mvf@vestergaard-frandsen.dk</p> <p>Internet: www.vestergaard-frandsen.dk</p> <p>zeneca@net2000ke.com</p>
ZENECA International Limited (Kenya Branch)	<p>Niel Mitchelmore (Business Manager - East Africa)</p> <p>John Ndung'u (Public Health Consultant)</p>	<p>P.O. Box 62585 Nairobi</p> <p>Jabavu Lane, off Argwings Kodhek Rd., Hurlingham</p>		