



## Malaria market analysis Nigeria

### Market landscape assessment of malaria prevention commodities and trends across states

#### Background

The private sector in Nigeria plays a pivotal role in malaria healthcare, particularly in the face of the unprecedented cuts to funding for global healthcare assistance that threaten progress towards malaria elimination. In 2021, among children with a recent fever for whom advice or treatment was sought, more than half received this from private sector sources.<sup>[1]</sup>

While the case management market is relatively regulated, the malaria prevention commodity landscape in Nigeria is fragmented, poorly regulated and marked by a proliferation of diverse local products, which can limit availability and affordability of effective prevention tools. Despite insecticide-treated nets (ITNs) being highly effective at preventing malaria,<sup>[2]</sup> only 59 percent of households in Nigeria own an ITN, and 32 percent have full ITN coverage.<sup>[3]</sup> Even where access is not an issue, nets may not be used — choice of prevention method is influenced by perceived effectiveness, provider recommendations and peer testimonials, as well as by seasonal variations in indoor and outdoor sleeping habits and mosquito biting times.

#### Country

Nigeria

#### Funder

Malaria Consortium US

#### Length of project

January 2025 – June 2026

#### Partners

Innovation Consulting Ltd

National Malaria Elimination Programme

A deeper understanding of the private sector's role in malaria prevention and the factors influencing consumer choice will be essential for informing regulatory changes that can drive equitable supply and demand.

## Project outline and objectives

The Malaria Market Analysis study will assess the availability, pricing, affordability and demand for ITNs and other approved malaria prevention commodities (e.g. lotions, sprays, coils, insecticides and repellents) in Anambra, Borno, Lagos, Kano and Rivers states and the Federal Capital Territory in Abuja, Nigeria. Working with the Ministry of Health and relevant agencies to ensure alignment with national priorities, Malaria Consortium will examine both supply and demand, alongside an analysis of the regulatory and support systems influencing the malaria prevention market. The findings will inform strategies to address gaps in access and use of malaria prevention commodities.

The objectives of the project are as follows:

- Assess availability, pricing, product types, local versus imported supply, quality assurance, distribution networks and market trends across states.
- Examine how dwelling location, socioeconomic status and demographics influence prevention product preferences.
- Analyse consumer behaviour, including factors driving product choice, ownership, usage, expectations and awareness.
- Explore support systems and the role of government agencies and stakeholders in production, importation and distribution.
- Provide evidence-based recommendations to improve access and affordability of malaria prevention commodities.

## Activities

The project team are implementing a mix of qualitative and quantitative data collection involving key stakeholders, including regulatory agencies, private sector actors and community members. Activities include stakeholder engagement to build consensus and guide strategy; capacity strengthening through training of data collectors; and outlet and household surveys to assess market dynamics. In-depth interviews with policymakers and regulators will help uncover systemic barriers and opportunities to equitable access and use of malaria prevention tools.

Data analysis and dissemination of findings at state, national and international level through meetings and peer-reviewed publications will support evidence-based decision-making and co-creation of strategies by policy makers and key stakeholders for improved access to malaria prevention tools.

## Outcomes and impact

**A clearer understanding of the malaria prevention market in Nigeria.** The study will establish the private sector's role in malaria prevention. It will also identify barriers and enablers to access and affordability of malaria prevention services and commodities for communities. Evidence generated will inform targeted policy and market interventions.

**Improved access to and demand for effective malaria prevention measures.** The study's results will support data-driven decision-making by health officials, improve coordination with regulatory agencies, and strengthen the capacity of civil society organisations and private providers. Ultimately, the project will help expand access to effective malaria prevention tools for populations at risk of malaria.

Next steps may include co-developing market strategies, scale-up of effective models and integrating findings into national malaria control plans.



## References

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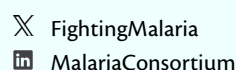
Cover image: Attau Dorothy sells mosquito nets in Nsukka market, Enugu state, Nigeria

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