



Making a difference in the first 1000 days to improve the lives of children and women

Advancing nutrition through innovation and new delivery models



CONTEXT



THE ISSUES AT STAKE :

161
million

Children are stunted

Growth faltering

Starts at

4 - 6

months of age

At least

51
million

Children are wasted

Out of

10

Nutrition interventions

4 link to IYCF



INFANT FEEDING IS FUNDAMENTAL TO ADEQUATE GROWTH AND DEVELOPMENT

1. Protection and promotion of breastfeeding is vital and is a key component of any nutrition intervention
2. Complementary feeding as of 6 months of age, is equally important but has received less attention
3. Guidance on nutrient density and feeding practices exists but is highly complex
4. Complementary feeding needs are constantly evolving over short period of 18 months

Appropriate complementary feeding is an untackled challenge



IMPROVING AVAILABILITY AND ACCESSIBILITY OF AFFORDABLE NUTRITIOUS INFANT FOODS

1. Too early or too late introduction of complementary foods
2. Evidence that it is challenging to meet all nutrient requirements of young children with affordable and readily available local ingredients
3. Specially formulated complementary foods or supplements can be part of a solution to improved CF
4. But in many parts of the world these are not available nor affordable

Objective of GAIN's IYCN program :

1. Develop proof-of-concept models
2. Incentivize private sector
3. Build enabling environment
4. Assess commercial viability, scalability and sustainability and public health impact,



3 MODELS

Public delivery model

- Fully subsidized
- Reaching lowest income groups
- Only public sector distribution

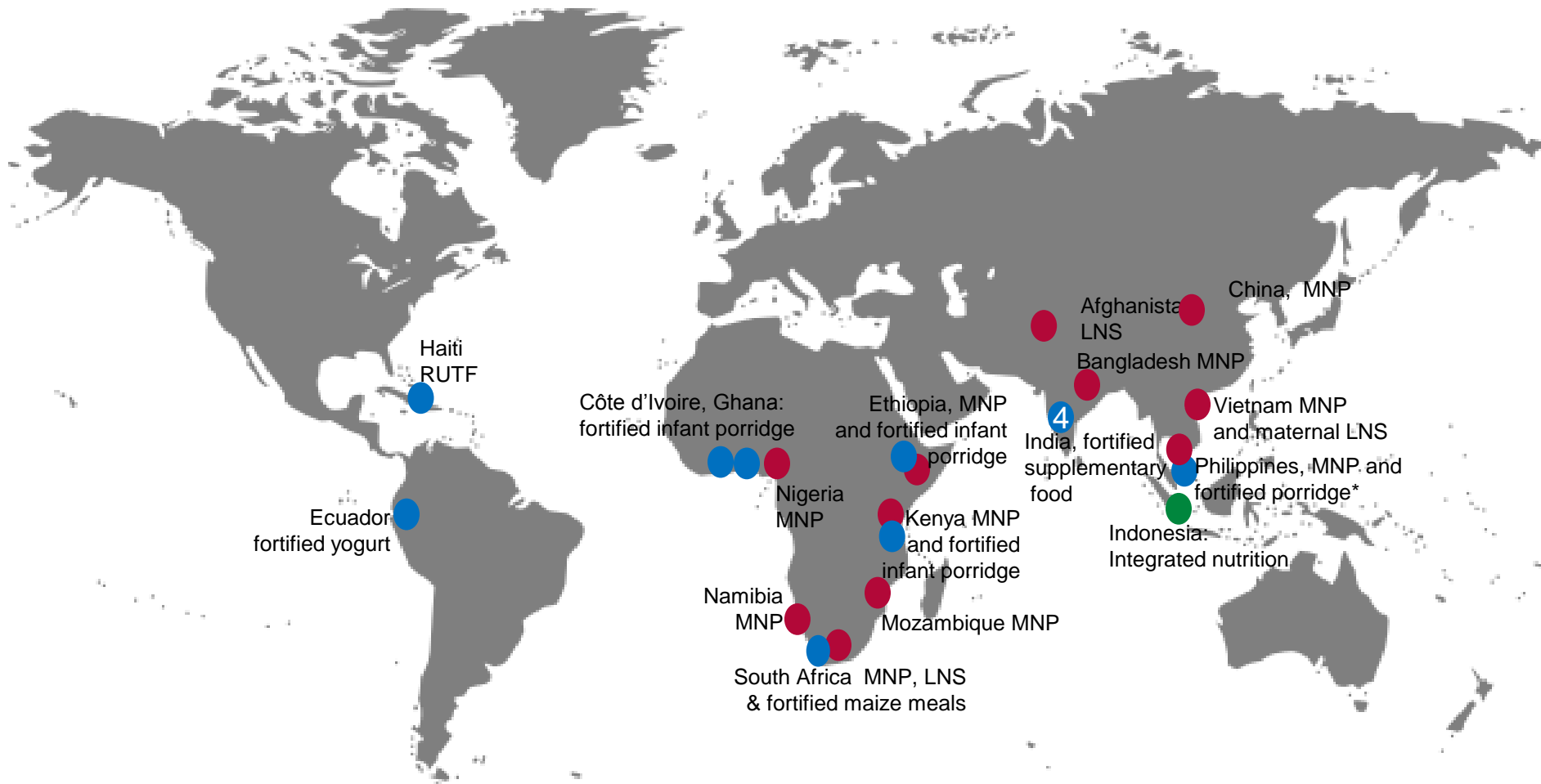
Fully commercial model

- No subsidy
- Mainly reaching higher-income groups
- Retail and other market distribution

Social business model

- Partly subsidized
- Reaching mid- and lower income groups
- Mixture of private and public sector distribution

23 PROJECTS IN 17 COUNTRIES



- Supplements, (multinutrient powders (MNP), lipid-based nutrient supplement (LNS) including ready-to-use therapeutic food (RUTF)
- Fortified infant foods
- Integrated nutrition program

EXAMPLES OF PUBLIC DELIVERY

Benue State, Nigeria :
distribution of micronutrient
powders during bi-annual
Health Weeks



Rajasthan, India :
women groups producing
and supplying fortified foods
to public delivery system

EXAMPLES OF FULLY COMMERCIAL



South-African pharma company targeting early adopters with MNPs : risk too high to target low-income groups

Indonesian food company making small steps improving composition, but waiting for government guidance to make major steps



EXAMPLES OF SOCIAL BUSINESS MODEL

Vietnam : MNPs developed by NIN and sold by health workers



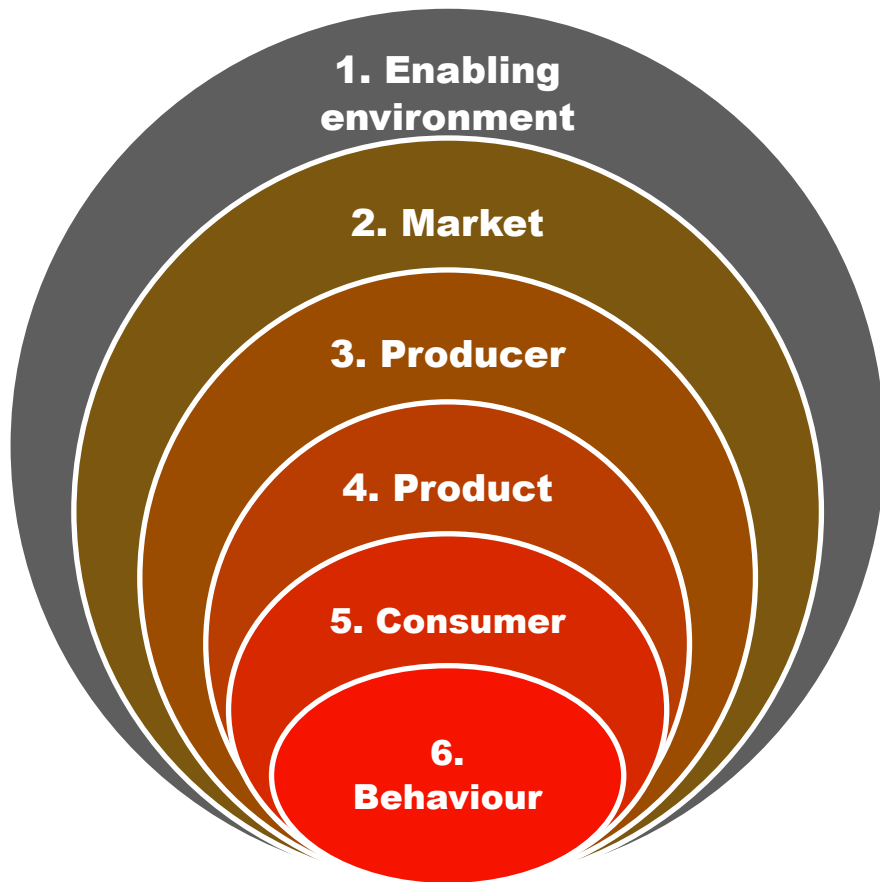
Côte d'Ivoire and Ghana : local companies selling affordable fortified complementary foods



6

KEY LESSONS

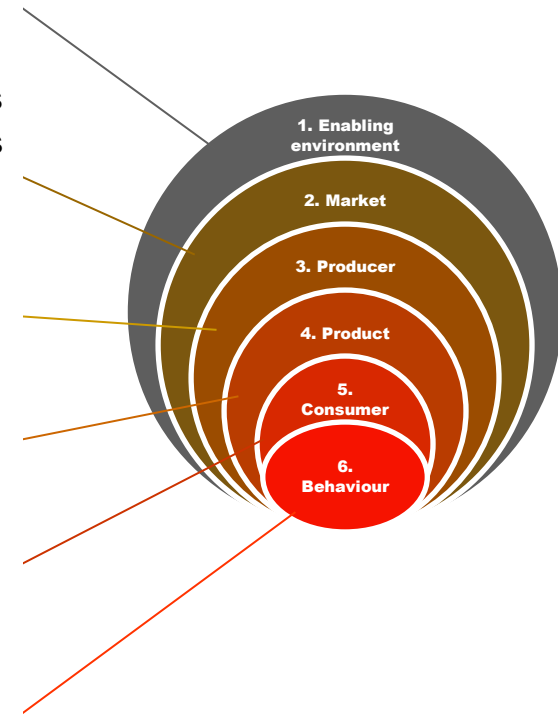
6 LEVELS



GAIN worked at multiple levels to increase availability and access, improve quality and enhance adequate utilisation of nutritious foods and supplements

6 LESSONS

1. Translating **global evidence** into a robust normative and **regulatory framework** is crucial to creating a favorable enabling environment for the introduction of product-based solutions; working with **strategic multi-stakeholder alliances** provides the necessary base of credibility, trust and transparency
2. **Market analysis** of new product categories for low-income consumers shows more conservative (slower) return-on-investment than industry benchmarks utilized for more mature markets.
3. **Reducing barriers to market sustainability** and success for private-sector producers requires financial and technical input support at different points along the value chain.
4. **Product innovation**, requires deep consumer understanding, and is paramount in responding to consumers' needs and drive appropriate use of IYCN products.
5. To create access for target consumers and drive demand for IYCN products, a **mix of traditional and alternative public and private sector delivery channels** must be used.
6. Sufficient investment and innovation in **demand creation and aligned behavior change** interventions are a prerequisite to guarantee trial, uptake, and adequate use.



LESSON 1: TRANSLATING GLOBAL EVIDENCE INTO A ROBUST NORMATIVE AND REGULATORY FRAMEWORKWORKING WITH STRATEGIC MULTI-STAKEHOLDER ALLIANCES

MIYCN working group

- Evidence review (FNB, 2009)
- Formulation guidelines (GAIN, 2010)
- Support to Ghana-chaired Codex WG
- Revised Codex guidelines (2013)
- Guidance on interpreting the Code for marketing of complementary foods

Home Fortification TAG

- Central on-line knowledge & practice hub
- 5 regional workshops with 66 countries in collaboration with UNICEF and CDC
- Guidelines and toolkit

Technical support in countries

- Expert meetings
- Technical assistance re: development of product standards and adoption of Code
- Building evidence base



LESSON 2: MARKET ANALYSIS OF NEW PRODUCT CATEGORIES SHOWS MORE CONSERVATIVE (SLOWER) RETURN-ON-INVESTMENT THAN INDUSTRY BENCHMARKS IN MATURE MARKETS.

Market analysis & Business Planning

**Success is slower
than benchmark in
mature markets**

- Market size and competitor analysis
 - Potential demand (\neq need) and market segmentation
 - Consumer insights & willingness to pay
 - Distribution channels assessment
 - Cost-structure & break-even period
-
- Industry benchmark in mature markets is 6-8 years for successful demand and uptake
 - Immature markets have weak distribution channels that do not reach BOP
 - Unknown product categories require time and investments to raise awareness
 - Companies may target early adopters and higher income segments, waiting for trickle down

LESSON 3: REDUCING BARRIERS TO MARKET SUSTAINABILITY AND SUCCESS REQUIRES FINANCIAL AND TECHNICAL SUPPORT AT DIFFERENT STEPS ALONG THE VALUE CHAIN



Sourcing



Production



Distribution



Marketing & Sales

- Support companies to benefit from economies of scale: eg. government subsidies on raw materials or competitive prices through GAIN Premix Facility
- Improving capacity and quality of small local companies creates competitive market
- Innovative finance can help access low-interest loans
- Existing retail and wholesale channels are weak, and offer insufficient distribution opportunity
- Social marketing through community networks can be stimulated by subsidizing VAT – higher profit margin
- Small companies must invest in creative push marketing eg. by offering convenience (eg. ready-to-eat).
- Institutional markets are crucial for growth, but local producers cannot access due to short lead times and lower global market prices

LESSON 4: PRODUCT INNOVATION BASED ON CONSUMER INPUT IS PARAMOUNT TO MOVE MIYCN PRODUCTS FORWARD.

Poor people want value for money!

Substantiated product claims inform mothers

- Price is not the only driver!
- They look for quality they can trust
- Relevance (small sizes)
- Convenience (time gain) is important driver

- No claims are allowed on infant foods < 24 months to protect breastfeeding and dietary diversity.
- This poses a challenge for mothers to distinguish good from bad foods.



LESSON 5: TO CREATE ACCESS FOR ALL CONSUMERS, BUT ESPECIALLY LOWER-INCOME HOUSEHOLDS, A MIX OF TRADITIONAL AND ALTERNATIVE PUBLIC AND PRIVATE SECTOR DELIVERY CHANNELS MUST BE UTILIZED....

Direct sales force brings slow growth and does not get to hard-to-reach



MNP sales through pharmacies bring less rapid growth than community workers

Multiple distribution channels are required to drive uptake: vouchers, retail, health centers and institutional markets



LESSON 6: WITHOUT PROPER INVESTMENTS IN EFFECTIVE DEMAND CREATION AND ALIGNED BEHAVIOUR CHANGE INTERVENTIONS, UPTAKE AND UTILIZATION WILL NOT BE OPTIMAL.

Promote nutritious foods / supplements within context of optimal IYCF practices



Driving compliance is critical: make use of reminders and rewards

Use multi-channel communication, harnessing mass and social media, as well as mobile phone technologies





**CONCLUSIONS &
WAY FORWARD**



ACHIEVEMENTS

23
projects
in **17** countries

Funding leverage
2:1
external: GAIN *

19
million
Children reached
with fortified foods
and supplements

Cost-effectiveness
2.83 \$
per beneficiary *



COVERAGE & CONSUMPTION SURVEYS*

High coverage of take-home rations in Andhra Pradesh & significant contribution to RNI

- **75%** receive take-home ration and **57%** of target group consumes daily, an average of **30 g (= 1 meal)**.
- No significant difference between rural and urban areas and between poor and non-poor families

- **70%** ever fed fortified complementary foods
38% ever fed Farinor/Nutribon
No significant difference between poor and non-poor households
Efficacy in reducing iron deficiency is proven

BUT

- Only **9%** fed Nutribon in last month and **5%** fed Nutribon in last week

Fortified complementary foods are well known in urban Côte d'Ivoire but regular utilization remains low.



CONCLUSIONS

- Private sector can be incentivized to manufacture quality complementary food products and responsible promotion
- But this cannot work without a supporting regulatory environment protecting consumers as well as incentivizing responsible companies
- Hybrid social business models seem to work best and more emphasis is needed on scaling up of multi-channel delivery..
- It is vital to create demand through behavior change interventions and to drive compliant use for measurable nutrition impact

Hybrid and market-based approaches can contribute to sustainable access to high-quality complementary foods



PIONEERING IN NEW TERRITORY WHAT COULD COME NEXT

Comprehensive approach

Nutritious products not as stand-alone, but as part of the solution alongside other interventions BCC, WASH , ECD,..

Behavior change & Demand Creation

Innovation in IYCF behavior change, drive compliant use of products, build evidence-base

'Full Market' approach

Strengthen entire value chain from sourcing through distribution



THANK YOU