ASSESSING MARKETS TO DEVELOP A SCALE-UP STRATEGY OF LDSS/N IN NEEDLES AND SYRINGES PROGRAMS IN LMICS

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Background
WHO recommends that people who inject drugs (PWID) should have access to sterile injecting equipment through Needle and Syringe Programs (NSPs). However, market and system barriers constrain access and coverage in low- and middle-income countries (LMICs). A multi-country market assessment was undertaken to support scale-up of low dead space syringe and needles (LDSS/N) products preferred by PWID.

Methods
The assessment was conducted across ten countries using a mixed methods approach. Semi-structured interviews were carried out with ministries of health, implementing partners, NGOs, and community-based organizations. Interviews explored NSP funding, structure, service delivery models, procurement processes, supply chain and regulatory considerations, policy environment, and decision making. Secondary service provision and consumption data, as well as country program documents, were reviewed to complement the findings. Data and information were synthesized to understand market readiness and explore market entry strategies for LDSS/N. Limitations include lack of private sector visibility.

Results
NSP funding was largely donor-driven via the Global Fund, with India as an exception. Procurement is mostly centralized, except in India (decentralized), and forecasting is typically annual. NSP structure, sites, and clients varied markedly across countries. Registration timelines vary from about 2 months (Ukraine and Tanzania) up to a year (India). Fast track registration processes exist only in Ukraine. No special supply chain requirements, distribution challenges, or regulatory barriers were seen for LDSS/N compared to standard needles and syringes. Programmatic barriers include procurement not informed by injecting needs, preferences, or quality, and limited price visibility.

Conclusion
Barriers to LDSS/N market entry were observed to be relatively low, but success in these markets will be decided by community demand and procurements aligned to their needs. Scale-up strategies should understand preferred products, embed these into procurement lists, strengthen quantifications, leverage Global Fund resources, including pooled procurement mechanism, and streamline efforts towards regulatory registration pathways for sustainability.

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