



HAND HYGIENE MARKET ASSESSMENT

**A PRACTICAL GUIDANCE FOR UNICEF COUNTRY OFFICES
IN SOUTH ASIA**

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1 Summary

This document aims to be a guide, and a starting point for hand hygiene market assessments for ROSA Country Offices. The information here is based on previous UNICEF market assessments, market mapping toolkits, technical briefs, and field note learnings listed in the footnotes and the reference section.

2 Background

In South Asia, only 57 % of households have a place in their homes to wash their hands with water and soap and at current trends only 75% of the population of South Asia will have access to basic hygiene services by 2030¹. To scale-up and sustain momentum, UNICEF and WHO launched the Hand Hygiene for All global initiative (HH4A) in June 2020 that supports increasing access to basic hand hygiene facilities at homes, schools, health care facilities, workplaces, markets, transportation hubs, and all other public spaces. To achieve universal hand hygiene, it is key to collaborate with the private sector and include market-based programming approaches. Universal hand hygiene can be defined as 100% coverage of hand hygiene facilities across key settings – households, schools, health care facilities, workplaces, and public spaces, like markets and transportation hubs, plus a strong enabling environment, access to adequate and affordable hand hygiene products and services and evidence-based behaviour change interventions.

3 What is a hand hygiene market?

A hand hygiene market is a structure that allows the production, transportation, exchange and consumption of hand hygiene-related services and commodities, including handwashing facilities and consumables. A market is considered well-functioning if **sustained demand** for hand hygiene services and commodities is met through **high-quality, available and accessible supply** that meets consumer preferences and is supplied by a viable business².

4 What is a hand hygiene market assessment?

A market assessment provides an insight into the **opportunities and barriers** for different actors in the market (customers, business, products, environment). From here it is possible to identify gaps – and therefore opportunities for interventions.

The objective of market assessments is to generate knowledge of the market system in an effort to²:

- **Understand supply and demand** of essential hand hygiene products and services, and the capacity of the market to meet the needs of the community, including those that are marginalized
- **Identify market vulnerability** to shocks, and its ability to quickly adapt, mitigate and recover from shocks
- **Inform preparedness plans and identify the opportunities** to strengthen the performance and resilience of the market system prior to a shock occurring.
- **Generate evidence around market opportunities** that will attract and incentivize private sector engagement.

¹ Hygiene Baselines pre-COVID-19 ([unicef.org](https://www.unicef.org), 2020)

² Engaging in Hand Hygiene Markets, [Agora](#)

A market assessment also serves as a baseline against which progress can be measured. A market assessment should include information about market actors, interactions between actors, rules and norms, and infrastructure. Methods used during market assessments might include desk reviews, interviews with stakeholders and field visits².

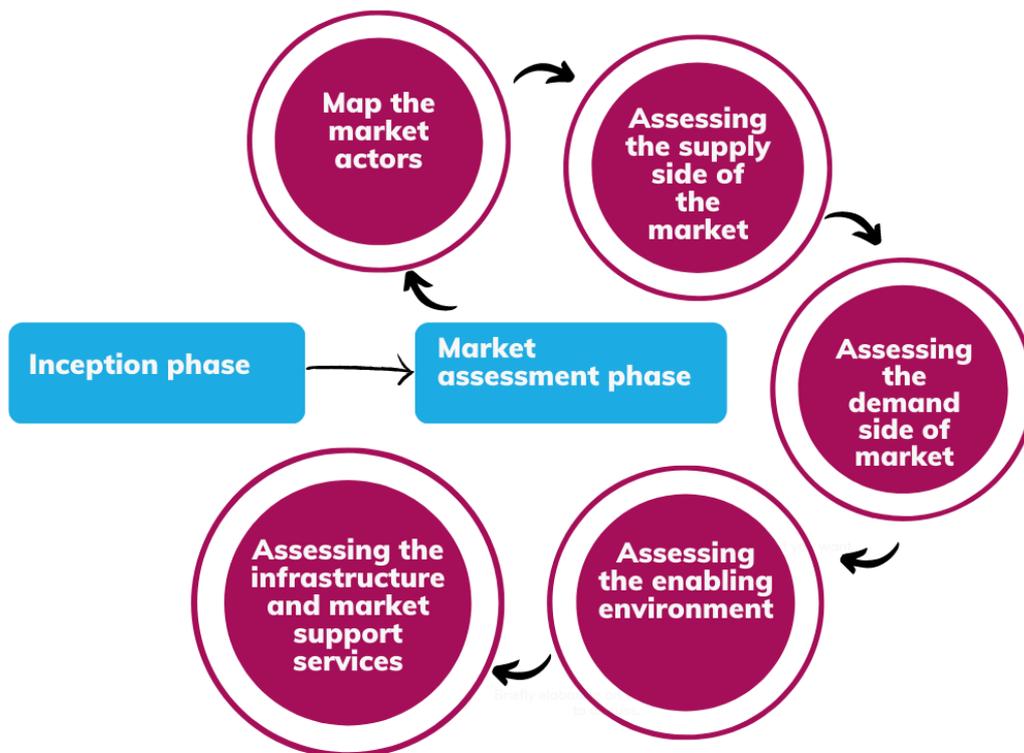


Figure 1 Shows the components involved in a market assessment

5 Guiding Principles

As part of its 2015-2030 global WASH strategy, UNICEF emphasizes support for sustainable markets for hygiene goods and services that meet the needs of the poor by balancing demand and supply. This includes building local market capacity to both drive demand for hand hygiene, as well as meet incremental demand affordably and sustainably².

UNICEF engagement with business is guided by the [Children’s Rights and Business Principles](#) and [Social and Environmental Standards](#) should be adhered to when developing an intervention².

6 How to get started

6.1 Inception phase

The inception phase may start with cooperation with government and partners

- Organize a meeting with the government to agree on the need for a hand hygiene market assessment to ensure government involvement and ownership.
- Arrange a government-led workshop to engage with key partners to discuss and agree on the approach.

Chapter 7 suggests what topics to discuss and agree on in the initiation phase.

6.2 Market assessment phase

Prior to starting the market assessment, it is a good idea to get an overview of relevant secondary data information available and decide on the primary data collection methodology. Here are some recommendations listed to get you started. Chapter 7 includes suggestions for topics to include in the market assessment.

- Develop and update your market map throughout the market assessment to show the different market actors and how they interact. Useful resources may be [EMMA Toolkit](#) (step 3) and [The Market Map](#).
- Develop or identify already existing questionnaires relevant for the market survey (for examples, see section 9.0).
- Develop response forms and data sheets to record and collate data
- Develop a database of actors, their products and geographical coverage (for examples, see section 9.0).

Information during the market assessment may be collected through various means, including but not limited to

6.2.1 Secondary data collection:

- Review literature, previous assessments and studies, and relevant data collected in this area (multiple indicator cluster surveys, national representative studies, developing partners studies/assessments, sanitation market assessment, and the Joint Monitoring Program etc.)
- Use existing platforms and leverage networks to collaborate with partners to gain relevant information and data.
- Supply side
 - VISION/SAP may be a tool to see trends in the supply market and obtain an overview of the supply actors, and their products and services, prices, and delivery times by looking at historical procurement data (e.g., ZPOX2, ME2N).
 - Market intelligence, such as [retail measurement services](#) provides quality data on product movement, market share, distribution, price, and other market sensitive information.
- Demand
 - Quantify the current and potential demand and market size by looking at unmet needs, e.g., using figures from the Joint Monitoring Program.
- Enabling environment
 - Identify work previously conducted in this area; [The Country Hand-Hygiene-Snapshot](#) lists country specific policies, [Hand Hygiene for all Roadmap](#) outlines objectives and outcomes to strengthen the enabling environment.
 - Review government policies and programs that involve hand hygiene
 - Understanding the fund flow and budget for hand hygiene in the governmental programs

6.2.2 Primary data collection:

- Decide on the primary data collection method
 - Supply: field visits, web-surveys, key informant interviews, etc.,
 - Demand: interviews, focus group discussions, surveys, household visits. Consider also more informal exercises such as a ‘walk-through’ at markets, bus stations, in villages, etc. where discreet and brief conversations are held with random people.
- Define the sample size
 - Look at sample sizes used in previous hand hygiene market assessment (links available in the reference section)

- UNICEF Multiple Indicator Cluster Surveys ([UNICEF MICS](#)) has developed a guideline on how to define sample size [Chapter 4 - Designing and Selecting the Sample](#)
 - [EMMA Toolkit](#) (Step 5) elaborates on sample size and categories, interview time, and whom to interview.
- Collect information in different settings. It may be differences in availability, price, distance to shops, preferences, etc. for an urban consumer vs. a rural consumer, and even within the different settings such as households accessible by road vs. households inaccessible by road.
 - Ensure to include consumers from different target groups (ethnic groups, castes, female and male-headed households, young, elderly, disabled, etc.)
 - Define the focus and themes for the interview (questioners may differ when interviewing a larger market actor such as an importer vs a local market actor like a trader or a local shopkeeper).
 - When assessing the supply and demand market actors, you should assess their views on the enabling environment too (see suggestions in their respective chapters below).
 - The two UNICEF reports: Mapping Policies and Tracking Budget for Hand Hygiene at [national](#) and [state level](#), includes methodology and a ranking system that can be applied when assessing the enabling environment.

7 Hand Hygiene Market Assessment

7.1 Inception Phase

A. Define goals and roles

You should:

- Define the aim of engaging with the hand hygiene market in your country
- Define clearly UNICEF's role when engaging with hand hygiene markets, especially with respect to relationships with government and private sector actors

This serves as an inception phase where the aim is to consult with relevant partners to define the scope of the hand hygiene market assessment. Parties should agree on the terms of reference and the scope of the assessment.

1. Define goals and roles

- a. Outline the purpose, objectives, and deliverables of the assessment (what specifically do you want to learn and analyse in the market)
- b. What are the roles of UNICEF, government and partners in the hand hygiene market assessment?

2. Understand the priority focus areas for the market assessment.

- a. Identify which themes the assessment will cover (typically demand, supply, the enabling environment, and the infrastructure and market-support services.)
- b. Identify the geographical areas in which the assessment will be carried out, including names of locations.

- c. Identify types of settings (urban, rural, remote areas, etc.) and subcategories prioritized for the market assessment (marketplaces, malls, transportation hubs, areas not accessible by road, etc.)
 - d. Get a high-level overview over the hand hygiene market - map stakeholders and how they interact
 - **Supply** - manufacturers, traders, wholesalers, distributors, retailers, etc.
 - **Demand** - households (low-income households, female-headed, people with disabilities, elderly, youth, caste, etc.) and institutions (public and private, such as schools and health care facilities and religious institutions).
 - **Enabling Environment** - policies, standards, regulations, institutional roles, sector financing, performance and accountability mechanisms, capacity development.
 - **Infrastructure and market-support services** - roads, logistics and distribution channels, storage capacity, access to water, promotion and marketing activities, technical support for construction and maintenance, access to financial support, etc.
 - e. Identify products and services to be included in the assessment, such as purpose-built handwashing facilities, supplies used for handwashing (e.g., water buckets, taps, piping etc), soaps, alcohol-based hand sanitizers (% of alcohol concentration, gel, wipes), IEC material (education and promotion) and market services (construction and maintenance).
3. Determine the information route – which aspects of the assessment will rely on primary data, and which will rely on secondary data.
 4. Identify key informants for the primary data collection - identify and name suppliers, government officials, developing partners, institutions, etc. and key sources of secondary data (previous surveys and assessments, policies, standards, etc.).
 5. Determine potential risks associated with the market assessment and mitigation strategies.
 - a. Adhere to UNICEF's Children's Rights and Business Principles and the Social and Environmental Standards.
 - UNICEF does not endorse any specific brand.
 - UNICEF does not grant partnership exclusivity; and
 - UNICEF shall not provide unfair market advantage to companies through its engagement.
 - b. Assess trade-offs, costs and risks including potential negative impacts on market competitiveness (i.e avoid the creation of a monopoly).
 - c. Consider gender equality and inclusion.

7.2 Market assessment phase

B. Assess the market

It is important to assess the market so you can:

- Understand supply and demand
- Identify risks and market vulnerabilities
- Make informed decisions about market interventions

The following paragraph gives an overview of typical themes included in a market assessment. The information listed here is not exclusive, and your market assessment may not be limited to the information given here only.

Market assessments should generate knowledge of the market system to: (1) understand supply and demand; (2) identify market vulnerabilities; (3) inform market interventions and preparedness plans; and (4) generate evidence to leverage the engagement of private sector partners.²

7.2.1 Map the market actors

1. Map the different types of actors within the hand-hygiene market and show how they influence each other (example see [The Market Map](#)):
 - Supply side: Importers, manufacturers, traders, wholesalers, distributors, retailers, local shops, etc. Who are their customers – who buys their product/service (not necessarily the end user). Understand their roles and how they interact with the other market actors.
 - Demand side: consumers and end-users (households, institutions, etc.). Understand how the different consumers and target groups (rural vs. urban, schools vs. households, low-income, disability, elderly, and so on) interact with the other market actors.
 - Enabling environment: policies and strategies that identify goals, pathways, and sector investments related to hand hygiene, strategies for service delivery, institutional agreements, coordination mechanisms, legal and regulatory frameworks, budgets, taxes, tariffs, and transfers (3Ts), performance and accountability mechanisms, and so on, that influence the other market actors.
 - Map infrastructure and market-support services that influence the market, such as promotion and behaviour change activities, marketing campaigns, social norms, access, transportation and logistics, storage facilities, access to water, donations (e.g., as part of emergency response), financial services (credit), etc.

7.2.2 Assessing the supply side of the market

1. Actor information and market size
 - a. Identify actors by name, types of products and services they offer, and geographical location and distribution patterns.
 - b. Identify Customers
 - Map their customers (end-users such as households, schools, health centres, etc., or other supply actors such as wholesalers, retailers, local shops etc.)
 - Understand how products reach the customer - the means of transporting and delivering products.
 - From the supply-side perspective, understand their customers' preference around products and services, as well as willingness to pay for hand hygiene products and services (e.g., there may be contexts where end-users (households, schools etc.) have received items as donations in the past, such as in emergency contexts or as part of the COVID-19 response).
 - c. Actors' market size
 - Obtain overview over actors' trade volumes, numbers of sales, numbers of customers, distribution, etc.
 - Investigate how long it takes for the different actors to produce, order, and restock products.
 - Check whether there are seasonal fluctuations (e.g., from year- to-year or within the year). How resilient are the actors in regard to these fluctuations and changes in demand; how fast can the actor supply the same quantity as before, vs. double vs. triple times the quantity.
 - d. Costs and cost factors
 - Obtain an overview of costs related to the products and services offered by the supply actor. Understand the relation between production cost vs. market price.

- Understand the business model, payment modalities (credit/debit), and cost drivers such as taxes, subsidized costs, operational costs (storage, transport, labour, rent, licences etc.) and profit margin.
 - Assess how partnership agreements influence the price of the product (distribution deals, bulk-purchase, credit-lines/sources of credit).
 - Understand whether there are cost differences within different settings (e.g., remote vs. urban) for the same type of products and services and what the key contributing factors are to the differences.
2. Market opportunities, weaknesses, constraints, and gaps.
- a. From the supply actor's perspective, assess how the enabling environment benefit or hamper business, including but not limited to (1) policies, standards and quality control systems, (2) sector financing and potential subsidies, (3) government tariffs, taxes and trade regulations etc.; and understand how these factors influence their business and products in ways like affordability, product prices, availability, innovation, and entry of new products/services into the market etc.
 - b. Identify the business constraints and opportunities to expansion such as transportation and distribution of supplies, access to raw materials, import, export, access to credit and space requirements (e.g., storing, bulk purchases) etc.
 - c. Understand how the marketing campaigns from market actors (such as supply actors, government, institutions) influence the supply side (e.g., change in demand and types of products, specific brand etc.).
 - d. From a supply-side point of view, understand the opportunities and measures that can support the needs of specific groups and settings, such as low-income households or in remote areas.
 - e. Look at what key incentives influenced the supply chain actors driving the progress of the National Hygiene Estimate from 2015 until 2022 (JMP data) – What was then, what is now.
 - Key changes such as policies, standards, budget allocations, subsidies, accessibility, infrastructure, import, variety of products, changes in market-service support etc.
3. Market facilitating activities
- a. Through which channels do actors along the supply chain access market information and insights, including market opportunities, business models, financing opportunities, etc.

What to ask whom



Supply

Local market actors (local shops, retailers, distributors, petty traders): Focus on practical information and data. Questions under point 1 and 4 are the most relevant.

Larger market actors

(importers, manufactures, wholesalers, traders, service providers): Strategic market-analysis, understand market shares and trends. Questions under point 1 to 4 are the most relevant.

Key informants

(federations, associations): system-wide, high-level questions to understand the enabling environment, infrastructure, and market-support services influencing the supply side. Questions under point 2 and 3 are the most relevant.

- b. Coordination platforms, e.g., are there national associations, how do the supply actors share information, conduct knowledge management activities.
 - c. Engagement with customers and consumers - how do businesses engage and communicate with customers, and how do they capture consumer/end-user feedback.
 - d. Capacity needs: understand whether there are any capacity needs in the sector to perform core functions, e.g., training opportunities.
4. How have external events and crises impacted the supply-side of the market in-country; obtain an understanding of the resilience of the market at the time of the event (for example, COVID-19, the Rohingya Refugee Crisis in Bangladesh, the Nepal-Earthquake, and the flooding in Pakistan).
- a. Understand supply chain actors' capacity to meet the emergency needs/increase in demand.
 - b. Product preference – understand whether there have been changes in types of products, quantities, and services requested by their customers.
 - c. Look at deviations in sales numbers during the crisis compared to the time prior to or after the crisis.
 - d. Lead-time: changes in lead-time compared to a normal year, including the time the traders use to produce, order, or restock goods for sale.
 - e. Changes in stock, quantities available and supplied, and prices compared to a normal year (e.g., an increase or decrease compared to the previous year(s) or seasons).
 - f. Assess the challenges that external events had on supply, such as accessing supplies and raw materials, production of products, service delivery during lockdown (COVID-19), distribution, import etc.
 - g. Coping strategies – assess the actions of supply actors in dealing with and responding to the emergency – why are some products/services available while others are not?
 - h. What influence had interventions, such as cash-based, in-kind donations, subsidies and promotion on supply actors. Understand to what extent the crisis and its outcomes created imbalances of market power in the market system and undermined competition.

7.2.3 Assessing the demand side of the market

1. Hand hygiene practices and preferences
 - a. Consumers' handwashing practices: what type of products and handwashing facilities do they currently use or have in the house/school/health centre such as taps, buckets, access to water, soap, sanitizer, etc.
 - b. Consumer preferences when it comes to types of products and product attributes.
 - For the different consumers such as households and institutions (schools, health centres).
 - Look at why certain types of products are preferred over others such as brand name, handwashing designs - features and functions it should and should not have, bar vs. liquid soap vs. sanitizer, quality and product performance, medicinal benefits of certain products, cost, and construction complexity).

- c. Understand in what way the social norms (e.g., gender, religion, caste, vulnerable groups, etc.) influence the consumers preferences and practices, and look into how they interact with the different actors (supply and the enabling environment)
2. Budget allocation and purchase priorities
 - a. **Households**
 - Understand households' income and purchase priorities – how much out of the total budget is spent on hand hygiene
 - Affordability and what the consumer is willing to pay for handwashing facilities, products and services.
 - Understand the various payment options such as cash, by card, subsidy (voucher, donation etc.), credit etc.
 - b. **Institutions**
 - Understand institutions budget allocation for hand hygiene vs. total budget and purchase priorities.
 - Understand how they procure products and services, and their financial mechanisms.
 - Understand the various payment options (Pay upfront or on credit; do institution receive subsidy for any type of product or services (e.g., construction, donations)).
 3. Accessibility
 - a. Accessibility of products and services: Understand the current consumer's 'pathway to purchase'. What kind of products do they have access to, including local vs. imported products, and the proximity of purchasing supplies.
 - b. Understand consumers' preferences vs. the availability of products (consumers may not be exposed to certain products and therefore do not demand them) -untapped potential demand.
 - c. Understand whether the available products and services are suitable for the different target groups such as the very young, the elderly, people living with a disability, religious groups, schools, health centres, etc.
 4. Understanding motivations and drivers
 - a. What would consumers personally gain from having and using a good handwashing facility and consumables, compared to what they have and do now (potential untapped market: unmet needs and potential demands).
 - b. Understand how consumers receives information related to hand hygiene (e.g., from governmental facilities, promoters, media, marketing actors, development partners etc.), types of activities attended and consumers preferences on types of education and learning (promotion, media, marketing events etc.).
 - c. Understand the leading causes of behaviour change, if any: was it due to financial support (donations, credit), increased accessibility of products and services, promotions and awareness activities, service delivery support and so on.
 - d. Assess how the process of learning about, purchasing, and installing a handwashing facility can be made easier, quicker, and more reliable.

5. How have external events and crises affected the demand-side of the market in-country (for example, COVID-19, the Rohingya Refugee Crisis in Bangladesh, the Nepal-earthquake, and flooding in Pakistan)
 - a. Assess whether there have been changes in consumption and purchase patterns compared to the *normal* situation prior to the crisis. Such as an increase in consumption, what type of products and services needed, raised prices, reduced availability in the market, blocked access to market etc.
 - b. Assess the types of market services, assistance, and hand hygiene activities that were offered by the government and/or NGOs at the time of the crisis (promotion, O&M services, subsidies such as cash-based, donations, etc.)

7.2.4 Assessing the Enabling Environment

1. Governance
 - a. Identify strategies, policies, and standards (government and non-government).
 - b. Identify standards and requirements applicable for hand hygiene.
 - c. Assess to what extent the policies drive demand.
 - d. Assess the institutional arrangements and the roles and responsibilities of critical institutional actors across sectors and levels.
 - e. Assess coordination mechanisms for the hand hygiene sector.
 - f. In what way do the policies influence whether products and services reaching the different target groups, such as low-income households, female-headed household, disabled persons.
2. Financing
 - a. Identify dedicated budget lines for hand hygiene.
 - b. What taxation and tariff structures are in place, and how do these influence the availability and affordability of hand hygiene commodities and services.
3. Data and Information
 - a. Identify hand hygiene targets.
 - b. Get to know if they have monitoring indicators for hand hygiene.
 - c. Understand their planning, monitoring and evaluation mechanisms.
 - d. Identify government systems for tracking hand hygiene progress across sectors.
4. Capacity
 - a. Assess the institutions capacity to fulfil their role.
5. Innovation/ Private Sector Engagement
 - a. Assess if the enabling environment benefits or hampers businesses/ supply actors.
 - b. Are regulations/standards facilitating or constraining competition, the entry of new products into the market, or affordability.

7.2.5 Assessing the infrastructure and market-support services

1. **Identify infrastructure and market-support services** that have an influence on the hand hygiene market
 - a. Identify the types of activities conducted for demand creation, how they received the information, and by whom. Such as promotion, marketing campaigns, media (newspaper, tv, internet), health centres, governmental actors, NGOs, the private sector, etc.

- b. Assess what types of infrastructure (water points, storage capacity, roads and means of transportation, etc.) influence the hand hygiene market.
- c. Identify the different types of service delivery or technical support (such as construction) that are available and offered, and who provides them.
- d. Types of financial services (subsidies, credit, loans, etc.) that influence the market.

8 Tools and analysis applicable for analysing the market

- Analyse data and present findings and recommendations for potential interventions.
 - Examples of a SWOT analysis (strengths, weaknesses, opportunities, and threats) is available here
 - [UNICEF Eswatini Hand Hygiene Market Assessment](#)
 - UNICEF Nigeria [Hand Hygiene Products and Services Market Assessment](#)
 - [The UNICEF ROSA Sanitation Market Assessments](#)
 - Focuses on analysing and identifying the primary market constraints: who is constraining who?
 - What is preventing and/or discouraging the supply side from providing appropriate, high-quality products and services at affordable prices.
 - Developed an affordability model.
 - JMP data or other government statistics is used to quantify demand and potential market value.
 - [The EMMA Toolkit](#)
 - Describes how to conduct a Gap analysis, market-system analysis and response analysis (step 7-9).
- **Develop a database** of suppliers, their products, and other relevant info (for examples, see the hand hygiene market assessments conducted by other UNICEF offices below).
- **The market insights and analysis** must be disseminated among stakeholders to validate them and jointly identify strategic next steps and activities.

Supporting documents for the preparation and assessment of the hand hygiene markets

Key sources of information and examples, ROSA documents

UNICEF ROSA - [Country Hand-Hygiene-Snapshot South Asia](#)

UNICEF Pakistan – [Pakistan Hand Hygiene Roadmap](#)

UNICEF ROSA - [Sanitation Market Analysis | UNICEF South Asia](#) (includes questionnaires for primary data collection and a database of suppliers and their products).

UNICEF India - [Identifying Stakeholders and Capacitates Required for the Roll-out of Hand Hygiene Initiatives at State Level and Below](#) (includes questionnaires for primary data collection)

UNICEF India – [Mapping Policies and Tracking Budgets for Hand Hygiene \(National\)](#)

UNICEF India - [Mapping Policies and Tracking Budgets for Hand Hygiene \(State\)](#)

UNICEF India - [Bottleneck Analysis of Hand Hygiene Programming](#)

UNICEF India – [COVID-19 Handwashing with Soap facilities - Compendium](#)

Hand Hygiene Market Assessments, UNICEF

UNICEF Eswatini - [Hand Hygiene Market Assessment | UNICEF Eswatini](#) (Includes a database of suppliers and their products, and samples sizes for primary data collection)

UNICEF Kenya – [Hygiene Market Analysis](#) (Includes an overview of sample sizes used for the primary data collection.)

UNICEF Nigeria – [Hand Hygiene Products and Services Market Assessment](#) (includes a database of suppliers and their product, a map over stakeholders, and questionnaires/key informant interviews for primary data collection) (Internal)

UNICEF Indonesia – [Market Assessment for Hand Hygiene Products and Services](#) (Includes an overview of sample sizes used for the primary data collection.) (Internal)

UNICEF - [Guidance on Market Based Sanitation](#) (For the inception phase, Table 7 lists examples of UNICEF roles; Page 68 gives an example of how to divide the landscape into broad geographic segments + Includes questionnaires for primary data collection)

Other relevant information on hand hygiene market assessment

UNICEF - Agora training: The Agora training [Engaging in hand hygiene markets](#) is a tool to obtain an introduction to the market assessment methodology.

UNICEF - [Technical Brief on Engaging Hand Hygiene Markets](#) (Internal)

[UNICEF Supply Division](#) developed a technical brief on handwashing facilities and relevant supplies for the COVID-19 response.

EMMA Toolkit - [Emergency Market Mapping and Analysis](#) (Step 3 provides examples of market maps that shows the different market actors/stakeholders and how they interact. Step 4-5 includes questionnaires for primary data collection)

UNICEF – Field Note [Learnings on engaging Hand Hygiene Markets](#)

UNICEF – DP/03/2022 [Using Product and Consumer Research Data to Inform Hand Hygiene Programming](#) (LINK)

Examples of [hand hygiene market assessment ToRs](#)

[UNICEF's Supply Chain Maturity Model](#) provides a measurement framework and tool to track the performance and capability of national supply chains across a maturity framework that ranges from level 1 to level 5, where level 1 represents basic to minimum development and performance while level 5 reflects fully developed, integrated and excellent performance.