

FINAL REPORT

Sanitation Market Analysis Report

Sustainable Water, Sanitation, and Hygiene for All (SUSWA) Project

RESUBMISSION: MAY 12TH, 2023



This document compiles the insights and learnings through the HEAR, CREATE and DELIVER phases of deep dive on Sanitation Market Analysis in the Karnali Province of Nepal.





May 12, 2023

DISCLAIMER

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List of Acronyms

COVID-19	Coronavirus Disease 2019/2019 novel coronavirus
EU	European Union
FGD	Focus Group Discussion
GESI	Gender Equality and Social Inclusion
GoF	Government of Finland
GoN	Government of Nepal
HCD	Human-Centered Design
HHs	Households
iDE	International Development Enterprises
KII	Key Informant Interviews
MHM	Menstrual Hygiene Management
NGO	Non-Governmental Organization
ODF	Open Defecation Free
ROI	Return on Investment
SCORE	Sanitation in Complex Operational Environments
SUSWA	Sustainable Water, Sanitation and Hygiene for All
WASH	Water Sanitation and Hygiene

1. Background

1.1 Sustainable Water, Sanitation and Hygiene for All (SUSWA)

Sustainable Water, Sanitation and Hygiene for All (SUSWA) is a bilateral project designed to harness the collaboration of financial contributions from the government of Finland (GoF), European Union (EU), the Government of Nepal (GoN), the local governments and communities. SUSWA is working in 42 municipalities and municipalities of Karnali Province.

SUSWA follows the community-based approach as that of the previous WASH interventions supported by Finland. This project aims to support the establishment of an efficient and transparent WASH governance at a municipal level that would be capable of ensuring safe, sustainable, inclusive WASH services and conditions for all. SUSWA has the following three major objectives:

- Strengthened enabling environment and governance for sustainable WASH services and GESI in Project Municipalities.
- Climate-resilient, safe, and functional water supply in Project Municipalities.
- Sustainable S&H and dignified menstruation management

As SUSWA has envisioned sustainable WASH services through strengthened WASH governance including the improved supply chain, the project has planned to make efforts to build up and strengthen the workable outlook for the supply chain based on the field assessment and also culminating the practices adopted elsewhere as well. As ensuring universal access to sanitation and hygiene has been the prime objective of the government of Nepal in its recent 15th plan, the logical, justifiable, and evidence-based options researched from the field dynamics and knowledge would be required to effectively and systematically intervene for an improved sanitation supply chain.

1.2 Sanitation in Complex Operational Environments (SCORE), Nepal

SUSWA together with iDE came up with an agreement to conduct a study and make an effort to strengthen the supply chain of the sanitation market in Karnali Province.

The logical, justifiable, and evidence-based options researched from the field using a human-centered design (HCD) approach and process and knowledge would be required to effectively and systematically intervene for an improved sanitation supply chain in Karnali.

1.3 Sanitation and Geographic Context in Karnali

Karnali province borders China to the north, Sudurpaschim province to the west, and Gandaki province and Lumbini province to the east. The province consists of 54 rural and 25 urban municipalities and has about 366,037 households. By geographical spread, it is the country's largest province with an area of 30,211 sq. km., covering nearly one-fifth of Nepal's total area. However, it is sparsely populated with over 1.6 million people, accounting for 5.79 percent of the national population and the lowest provincial density in the country (56 persons per sq. km).

Nepal has been declared an Open Defecation Free (ODF) country in September 2019. However, despite being declared ODF, people are using unimproved sanitation facilities due to the imposed government policies and limited understanding of the people during the ODF campaign period. Nepal has been heading towards achieving the sustainable development goals primarily to achieve universal and equitable access to safe and affordable drinking water for all to achieve access to adequate and equitable sanitation and hygiene for all and end open defecation. The Government of Nepal is making all its efforts to expedite the movement toward total sanitation.

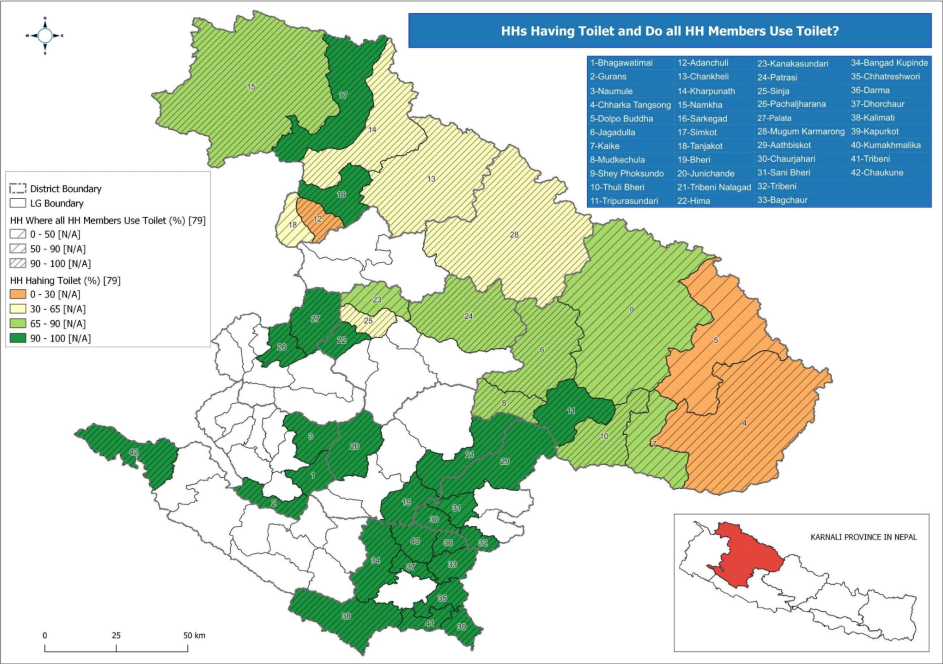


Figure 1: SUSWA Baseline Map

However, the momentum for the promotion of total sanitation has not taken speed in recent times as expected due to different reasons including the time taking process of state restructuring, readjustment of the government staff at three tiers of the government, delay in formulation of the legal instruments and less presence of the WASH projects to support for the sanitation and hygiene movement immediately after the declaration of Nepal as ODF. Various studies conducted to assess the sustainability of the ODF status in Nepal have revealed that the slippage of ODF on average stands at 10 percent. Whereas, the baseline conducted by SUSWA has disclosed that 8% of households don't have latrines.

1.4 Deep Dive Objectives

The main objective of this deep dive is to draw a holistic picture of the sanitation scenario in Karnali Province and to assess the market system for sanitation to design interventions to increase access to improved sanitation products.

Research strategies:

- Uncover insights related to the perceptions, motivations, and barriers for users to purchase, adopt, and maintain latrines;
- Uncover insights related to the perceptions, motivations, and barriers to suppliers/producers to create, sell, and maintain latrines;
- Understand the financial and social costs and challenges faced by households with latrine adoption/lack of adoption; and,
- Understand consumer and actor insights related to a desirable, viable, and feasible business model: 5 P's (Product, Price, Promotion, People, Place).

The key deep dive questions used to guide were the following:

Research questions:

- What are the current perceptions, beliefs, barriers, and opportunities from a user's point of view regarding sanitation and household latrines?
- What is the status of producers and what opportunities exist (capacity, technology, supply chain) currently for latrine producers?
- What is the current status of product distribution?
- What are the current installation, repair, maintenance, or upgrading practices and where is there room for innovation/improvement?
- How and when are products being transported and where are the bottlenecks and opportunities?

2. Deep Dive Methodology

2.1 Approach

Human-Centered Design Approach

Human-Centered Design (HCD) is a leading innovation methodology that maximizes the likelihood of adoption, long-term sustainability, and scalability of a market-based solution.¹ It is used to design and deliver holistic offerings – usually a combination of product(s), service(s), marketing, financing, and distribution. In essence, the approach is a branch of participatory

¹ IDEO (2011). Human Centered Design Toolkit: An Open Source Toolkit To Inspire New Solutions in the Developing World.

action research. iDE uses (HCD) approach to **HEAR, CREATE and DELIVER** products and services with the user as the center of focus. HCD engages with users to gain insight into their dreams, opportunities, and constraints around a specific problem. HCD then uses those insights and an iterative design process to identify desirable, feasible, and viable solutions.²

HCD utilizes an ethnography-like approach to deeply understand the latent user and stakeholder needs and combines it with design methods and expertise from product design, business design, service design, and marketing strategy. The result is a market-based solution that is desirable, accessible, usable, maintainable, and affordable to consumers, in addition to being technically feasible and economically viable for stakeholders in the market- system. HCD is a best practice amongst the world's largest (market-based) consumer goods and has gained recent credence in the development sector as a means to improve the return on investment (ROI) as well as the probability of scale and sustainability of market-based initiatives. HCD seeks to find solutions that are desirable, feasible, and viable. These three lenses shape the full research process from HEAR to CREATE through DELIVER.

Desirability (Social)—What do users need and want? What are the drivers and barriers to adoption? What incentives drive their decisions? What is the entire user experience, from the moment they are exposed to the solution to their ongoing use and maintenance?

Feasibility (Technical)—What can be done technically? Will this technology work locally and in environmental constraints?

Viability (Economic)—What is financially and economically viable? Is there a financing model and incentive structure that allows this solution to be sustained for as long as it is needed?

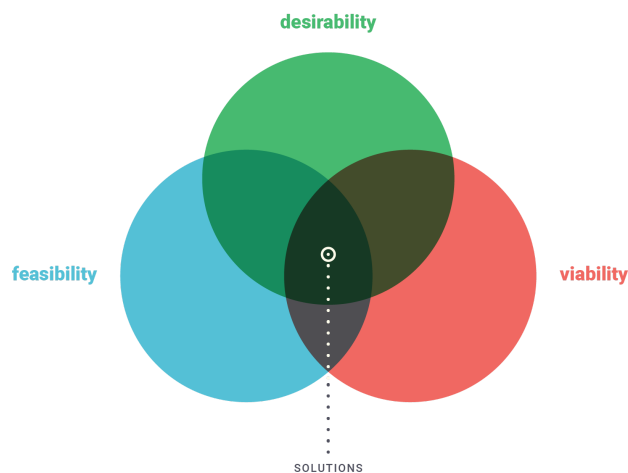


Figure 2. Three lenses of human-centered design³

² Silverman, Howard. (2015) Designly Ways for Action Research in The Sage Handbook of Action Research. Bradbury-Huang, H. (Ed.)

³ For more see iDE's webpage on HCD. <https://www.ideglobal.org/story/human-centered-design>

The HCD Deep Dive is divided into seven easy steps. The first four steps are planning and the last three are research and analysis.

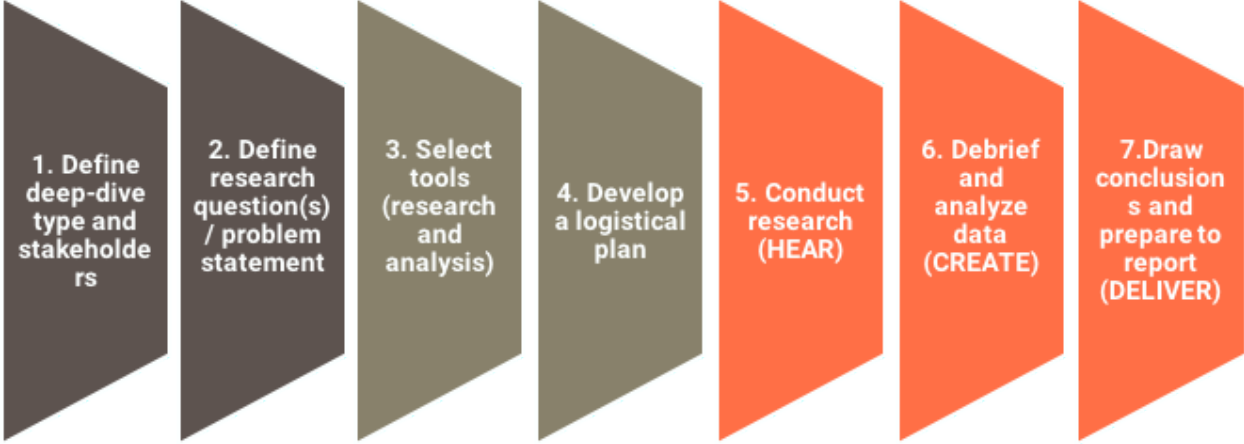


Figure 3: HCD Steps

2.2 Deep Dive Timeline

The timeline for the Deep Dive was to start from January 31st, 2023 with the final report submission planned for the end of March 2023. The field research was conducted from February 14- March 2, 2023, followed by a debriefing workshop during March 3-7 to analyze the data. Further analysis was completed during the second and third week of March from the insights captured during the research to identify recommendations for the next steps.

The teams conducted 15 focus group discussions (FGDs), 15 KIIs in Karnali Corridor and 23 KIIs in Bheri Corridor, and 20 deep dive investigations of the households. FGDs and KIIs were participatory and activity based and FGDs were conducted separately for the mixed, male, and female groups.

Table 1: Deep Dive Steps and Timeline

STEPS	TIMELINE/REMARKS
1. Define the deep-dive type and stakeholders	January 31-Feb 1 Initiated the process by identifying deep dive.. Key stakeholders were also identified during this step
2. Define research question(s) / problem statement	Feb 2-5 Drafted the first version of the research questions.
3. Select tools (research and analysis)	Feb 6- 7 Drafted and finalized participatory tools and frameworks for research
4. Develop a logistical plan	Feb 9-10 Prepared field logistics plans including travel and stakeholders mapping.
5. Conduct research (HEAR)	Feb 14 - March 2 Team spent 18 days working days for field information collection
6. Debrief and analyze data (CREATE)	March 3-7 Conducted workshop for debriefing field insight
7. Draw conclusions and prepare to report (DELIVER)	March 8-25 Developed preliminary and final report.

2.3 Data Collection

During the deep-dive, the team collected data and Information on different markets within Karnali province using three main methods:

- Review of literature available online or provided through key stakeholders along with iDE's previous market assessments
- Semi-structured key informant interviews (KIIs) completed in-person with government agencies, development partners, sector specialists, and the private sector
- Field immersion visits, which include a combination of

➤ **Observational techniques,**

In essence, we went to different HH dwellings in both Karnali and Bheri Corridor to see how proper sanitation was carried out there. We mainly wanted to record these observations through photos and notes. We mainly concentrated on how the HHs built their latrines and what specific items were lacking and making their lives challenging. Similarly to that, we also visited multiple retailers, and wholesalers did similar activities.

➤ **Key informant interviews**

During this study, we were able to interact with multiple stakeholders from the market and government to get some real insight into how the market keeps pace with the supply and demand of the sanitary product, and in line with that, we also further explored to get an insight on how the government is creating the enabling environment to contribute to the people on adoption, awareness, and basic necessities. In Karnali Corridor, we conducted 15 KII and 23 KII in Bheri Corridor, where there were participants from the private sector, government, schools, medical institutions, and so on. Similarly, we also conducted KII with the main wholesaler in Nepalgunj, who has been providing plastic sheets/pans to both corridors.

➤ **Focus group discussions (FGDs)**

From each corridor, a total of ten FGDs were done. To ensure that the FGDs we performed had diverse participant populations and perspectives, we purposely formed groups like just male groups, only female groups, mixed, and government participants. The community's perceptions, motivations, and desires with regard to latrine use were the key topics of the FGDs. During the course, we also discussed the challenges associated with using and adopting latrines. Through discussion, we learned more about the participants' viewpoints.

➤ **Household Deep Dive**

We conducted 20 deep dive investigations of the houses during our visits to both corridors and out of those 20, we discovered that only one HHs lacked a latrine. Through this deep dive, we attempted to comprehend many aspects of the entire latrine. Participants were questioned on comfort, sturdiness, conflict, revenue sources, hygiene, access to water, types, materials, installation, as well as support from various governmental and non-governmental organizations. Finally, we asked these HHs about their ideal latrine at the conclusion of the interview.

2.4 Deep-Dive Focus Areas

In iDE's experience, successful latrine uptake and sustained usage result from a full understanding of drivers and barriers to behavior change, including social, economic, health, and convenience factors, as well as challenges and opportunities in the broader market. Therefore, iDE's deep-dive focused on three areas throughout the assessment: ***demand(use of services), supply (service delivery), and enabling environment***. iDE's deep-dive focus areas are rooted in the assumption that developing market systems is the best way to bring about sustainable and scalable change to benefit low-income communities even in weak markets such as Karnali province. By identifying the underlying causes of weak market performance and designing interventions to address them, the power of markets can be leveraged to bring about large-scale and enduring change.

➤ Demand – Use of Service

The existing and potential demand for improved sanitation products was assessed to better understand the quality, price point, and size of the market, and to better identify potential customer segments. Data on customer preferences were collected from KIIs with private sector providers, and field immersion visits. The team ensured different customer segments were both represented and heard. To learn about the user experience teams engaged current and potential latrine owners in large group discussions. Following the HCD principle of entering with a beginner's mindset, the team did not use structured interviews but rather interacted with consumers through informal conversation, allowing participants to drive the conversation. Keeping an open platform for conversation where participants are in control helps to ensure that the discussion centers around topics that the user holds in highest importance and controls against researchers prescribing their own assumptions through their questions. Discussion facilitators loosely guided conversation by moderating dialogue for more equal participation among group members and also provided probing questions to spark conversation around topics of interest.

The data collected on customers include the following:

- quantity of existing and potential (untapped) demand for different types of sanitation products, including but not limited to pans, cleaning materials, containment systems, and superstructures
- consumer product preferences
- willingness and ability to pay
- customer segments, and the potential for smart subsidies

➤ Supply – Service Delivery

Information was collected on the supply landscape and product assessment from literature reviews, KIIs with private-sector providers, and KIIs with sector stakeholders (government agencies, development partners, local experts) to assess the level of competition and competitive dynamics, and the potential accelerators and barriers to private sector engagement. For all engagements with market actors, the research team conducted in-depth, open-ended interviews. Though the team continued to operate with an HCD beginner's mindset, interviews with component dealers and retailers, and service providers followed a similar structure which emerged organically as discussions were guided by topics directly related to the function and health of the actor's business. Interviews with enabling environment actors generally consisted of in-depth interviews with 1-2 representatives of the respective institution, however, there were a couple of cases in which a large group of people represented an enabling organization. Each research team had assigned facilitators and note-takers for both types of interviews.

The KIIs were designed to uncover the following information on the market:

- mapping and segmentation of available products, gaps, and needs (i.e. availability)

- estimated market size/value, trends, and geographic distribution for each product
- mapping of the different suppliers, producers, and distributors
- market drivers, risks, opportunities, and constraints

➤ **Enabling Environment**

The team used KIIs with private-sector providers and sector stakeholders (government agencies, development partners, and local experts) to identify improved coordination and support from the public sector and development institutions at the local levels.

Table 2 below highlights the type of stakeholders that were engaged during the Deep-dive process.

Table 2: Stakeholders and Tools		
THEMES	STAKEHOLDERS	TOOLS
Demand	Consumer Household, Civil society organizations	FGD, KII (Ladder, Journey Map, Stakeholder Mapping and Observation)
Supply	Dealers, Wholesalers, retailers, Mason, Lead firm, transporter, support services	KII (Stakeholder Mapping, Business Model Canvas)
Enabling Environment	Local government, School, Health Post, and Clinic, Civil society organizations	KII

2.5 Deep Dive Team

There were (3) iDE staff members who were deployed in the field to conduct the deep dive. The team was supported by technical backstopping from Director, iDE Global Operations, Asia.

Table 3: Deep Dive Team		
STAFF NAME	DESIGNATION	ROLE
Rabindra Kumar Karki	Water Resources and Engineering Project Manager	Lead Researcher
Arun Limbu	Monitoring and Evaluation Manager	Field Researcher
Soma Rana	GESI Lead	Field Researcher - GESI
Saroja Thapa	Global Operations, Asia- Director	Technical Backstopping WASH

2.6 Deep Dive Assumptions

Key development and government assumptions are critical to the success and/or failure of any intervention because it is important to understand what these groups already think or know. During the design of the Deep-dive, the team developed some of their key assumptions about sanitation marketing in Karnali province based on the information to date.

The following were the testing assumptions on ***Demand, Supply, and Enabling Environment***:

Demand (Use of Services)

1. People cannot afford latrines
2. Latrines are not considered a “need”
3. Current family dynamics do not allow some household members to use latrines
4. Lack of awareness regarding improved latrines links to good health
5. Availability of space to install two pit latrines
6. Expect a subsidized latrine
7. latrines should not be near house
8. Less awareness of O&M
9. Less social pressure to improve latrine

Supply

1. Unavailability of diversified products.
2. Can't afford high quality due to price point.
3. Unavailability of raw materials.
4. Product transportation due to weight and fragility.
5. Unavailability of inclusive products (disabled-friendly, pregnant/elderly)

Enabling Environment

1. Less promotional activities
2. Other I/NGOs are there with similar programs, they could help with awareness/demand creation
3. Govt. has some promotion --- could integrate programs at the local level.
4. Unavailability of skilled service providers such as masons
5. Less connection between market players
6. Less priority from LG on market-based sanitation supply chain

3. Findings

The team uncovered significant insights around the assumptions, consumers and service model, and products during the deep dive. This section summarizes these findings which are described separately, then summarized into three key focus areas: demand (use of services), supply (service delivery), and enabling the environment to understand the market system and recommend the interventions to strengthen the sanitation market system.

3.1 Demand (Use of Services)

3.1.1 Lack of consistent definition of “Improved Latrine”

There was a clear lack of consistency around the definition of what is an improved or quality latrine. Across all stakeholder groups, in both corridors, there is no consistent definition of an improved latrine. The definition ranges drastically from a fixed point, an open pit with a simple enclosure all the way to a CGI metal sheet superstructure with a septic tank.

The offset single-pit latrine is the most common type of latrine found in Karnali Province. Although some households that have higher incomes around the city areas have built septic tanks with double-pit latrines. The households have mostly used local materials such as mud, stone, sand, and wood for super and sub-structures. The latrines constructed in the province are not consistent. The standard of the latrines varied based on the material used, dimensions, purpose, uses, and location. The variation in the latrines is mainly due to the lack of proper knowledge of latrine builders. The **Figure 4** below shows the Joint Monitoring Programme sanitation ladder⁴. All latrines that are ranked 3 and higher are considered improved latrines.



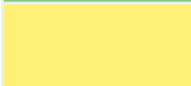


	SAFELY MANAGED Use of improved facilities ⁵ that are not shared with other households and where excreta are safely disposed of in situ or removed and treated offsite
	BASIC Use of improved facilities which are not shared with other households
	LIMITED Use of improved facilities shared between two or more households
	UNIMPROVED Use of pit latrines without a slab or platform, hanging latrines or bucket latrines
	OPEN DEFECATION Disposal of human feces in fields, forests, bushes, open bodies of water, beaches and other open spaces or with solid waste

Figure 4: Sanitation Ladder

⁴ JMP (2017). Progress on drinking water, sanitation, and hygiene: 2017 update and SDG baselines. Geneva: World Health Organization (WHO) and the United Nations Children's Fund

⁵ Improved sanitation facilities are those designed to hygienically separate excreta from human contact, and include: flush/pour flush toilets connected to piped sewer systems, septic tanks or pit latrines; pit latrines with slabs (including ventilated pit latrines), and composting toilets

3.1.2 Lack of awareness is the major issue for maintaining proper hygiene

The participants were not completely aware of the health and environmental risks of unhygienic sanitation. Participants considered moving from open defecation to having a fixed point latrine facility as a solution. However, those fixed point facilities are not improved or hygienic. Majority of the participants identified their latrine as unimproved which does not ensure hygienic separation of human excreta from human contact and does not properly flushed. The area's limited water supply and lack of proper sanitation awareness are impeding the maintenance of latrine hygiene. Because of the scarcity of water, very little water is used for cleaning up after use. The respondent's understanding and perception of sanitation products and services, of sanitation behavior, were not factually correct, leading to misconceptions and a lack of adoption of safe sanitation practices. Households do not consider sanitation as an investment for their health.

The importance of latrines has been realized by the people. The ODF campaign enhanced the knowledge and awareness regarding the impacts of open defecation and supported people in building the latrines. People use latrines regardless of proper design, standards, or quality. People have built and have been building latrines based on their needs and affordability.



3.1.3 Food is more important and most households are food insecure

This insight highlights that we can't sell latrines to someone who is hungry. The households in Karnali do not have sufficient food all year round from their own production. Subsistence farming, climate, limited cultivable land, and production yield are some factors directly or indirectly causing food insufficiency in the region. In the colder region, usually the upper belt of Karnali like Dolpa, and Jumla where snow falls occurs, people practice single cropping throughout the year due to the very long crop period. During the KIIs and FGD, the participants also informed that yield is decreasing due to changes in rainfall and snowfall patterns, and

insect pests. Hence households at different levels of food security will require different strategies. When food security increases, households are freed up to think about other needs such as sanitation.

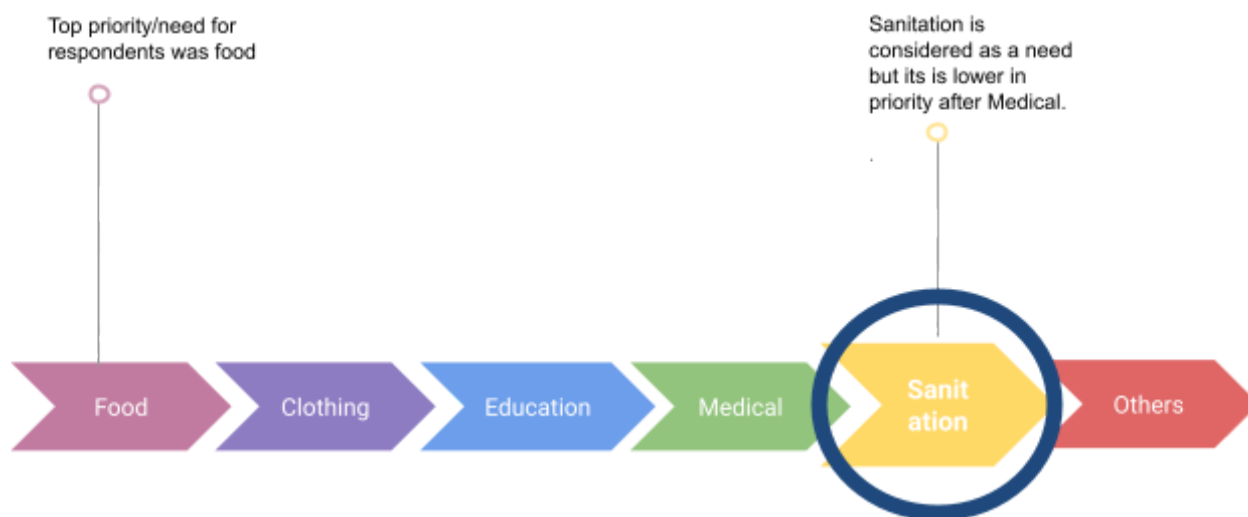


Figure 5: Sanitation Positioning

As part of the sanitation positioning participatory exercise, respondents chose food as their top priority, followed by clothing, education, and medical. Sanitation and entertainment were considered the least priority areas. The majority of participants expected latrines to be given out for free or subsidized.

3.1.4 Seasonal migration hinders investment in latrines

The trend of seasonal migration is common in both Karnali and Bheri Corridors but the date indicates that there is difference in pattern. The country of migration and duration of stay varies. For people in Karnali province, India is a common destination except for the people from Dolpa. People from Dolpa, mainly migrate seasonally during the months of May- June/July for harvesting Yarchagumba (*Cordyceps synensis*). For others, migrated year-around to India as seasonal labor workers, selling goods and herbs. Likewise, Gulf countries are also the destination for the people from Jajarkot, Salyan, and Rukum. A Government representative pointed out that illegal processing to migrate to the USA is also a trend in the Aathbiskot municipality of Rukum. Due to the migration of the male populations who are not home to make the decision on the purchase/ investment of the latrine, therefore there is less demand. Women members of household have limited agency or income to be able to make these decisions.

3.1.5 Gender dynamic for purchase of latrines

Based on participants' response, households' decisions to purchase latrines, primarily lies on the male head of the households. The male head of households ultimately decides to purchase or not to purchase a latrine while the wife can suggest and encourage. Another challenge highlighted in the above section is that due to the migration of the male populations who are not home to make the decision on the purchase/ investment of the latrine, therefore there is less demand. Women members of the household have limited agency or income to be able to make these decisions.


Gender discrimination is a significant social issue in Karnali and it has severe effects on growth and development in the market and many sectors. Women are widely dependent on men in terms of economy and other properties. During the discussion with women community members they shared that they had more involvement in unpaid care work, and lack of movement in the market so no idea about the types of latrines available. If they went to the market due to the less confident level of decision for new items, had less bargaining power and lack of money to purchase these materials, hinder them with market accessibility. Men are as key providers for the home and purchase materials and are given extra privileges within a patriarchal family dynamic, women have fewer opportunities for marketing, social development and freedom. The result is rooted in gender discrimination against women, with physically disabled women as an especially disadvantaged group in terms of social stigma and limited support.

3.1.6 Increased awareness on the use of latrines

People have developed habit of using latrines and do not defecate openly unless there is an emergency and while working in the field, when latrine is unavailable. Those who migrate, are separated from their combined family, or are building new homes construct new latrines. Pit filling is not an issue as most of the pits were constructed of dry stone masonry on the wall and floor. Those whose pits fill up reported either they have a small pit or a big family size. Some people have dug a new pit and let the older filled-up pit dry whereas some dispose of it in the open fields, and nearby.



Improved latrine is the first choice of the people we interacted with in the village as their awareness of use has increased with time and availability. They think that the previous latrines which they have built a decade ago have aged and are of very low quality. The latrines are made of all local materials except the pans. The pans that they got were made of plastic, which at



times gets cracked and hard to clean as it loses its shine with time. There's seems to be willingness to replaces the old latrines as long as they are inexpensive.

3.1.7 Location of latrine installation

The households have realized the importance of easily accessible latrines. Latrines close to the house are easy to use, inspect, refill the water bucket, and make users feel safe at night. Far latrines, on the other hand, are difficult to use at night, during the monsoon, and when sick. The households are constructing new buildings along with close latrines with more amenities. Although the commode is still not the people's first, an attractive, clean, tiled, and colorful latrine, having a bathroom together with a latrine is the preference of the people.

3.1.8 Motivation to purchase latrine

The households are still building new latrines in Karnali and the demand is coming from:

- Households who are building new houses;
- Families who are separated from the joint family;
- New businesses like hotels, and other enterprises opened in the market centers; and,
- Households latrines need to be replaced or got damaged by natural disasters.

People's desire and motivation have been changed with the experience of using their own latrine, observing neighbor's and relative's latrines, and seeing while visiting peri-urban areas. People believe a better home and latrine enhance their social status. A large number of plastic pans and fiber pans were supported by the government and development organizations. People built a usable latrine after getting material supported by themselves or limited support from local masons despite their limited knowledge of latrines, transportation difficulties, low purchasing power, and limited choices of products at that time.

3.1.9 Dalit Communities are even more deprived of sanitation

Food is the ultimate priority for the people in the districts we visited where we found out that the food that they harvest are only enough for a few months and they are dependant upon the general stores in their locality which is the major reason for these people to migrate to other countries.

Around 29 percent of the Karnali Province population comprises Dalit communities, according to the preliminary report of the National Census 2021. In Nepal, Dalit communities are often the last to gain access to essential services, including sanitation as they often are very poor and, despite legislation, actively discriminated against. They often rely on precarious and unpleasant daily wage work, like sweeping roads and are usually the last communities to gain access to essential services.

Disadvantaged Dalit households face several barriers to building their own toilets: often they cannot afford to build them; their houses are too small; and they don't own the land they live on. Without decent toilets, Dalit communities face increased risk of illness because drinking water sources (shallow tube wells or dug wells) are more likely to be contaminated.

The Dalit communities have to earn their livelihood only by doing labor work which is very hard at times. They have to depend upon the credit facility of the food stores which they are only able to repay after a few more months of labor work. They are also living in a small dwelling with around 6-8 family members and the ultimate breadwinner is the male member of the family.

3.2 Supply (Service Delivery)

3.2.1 Rural Sanitation Market Map

The figure below showcases a functioning sanitation market map.. In the assessment area, the team found the presence of no lead firm, or busines network or latrine producers. The retailers and hardware and utensil shops were selling the latrine products. The assessment team observed a number of plastic pans and ceramic pans from various manufacturers.

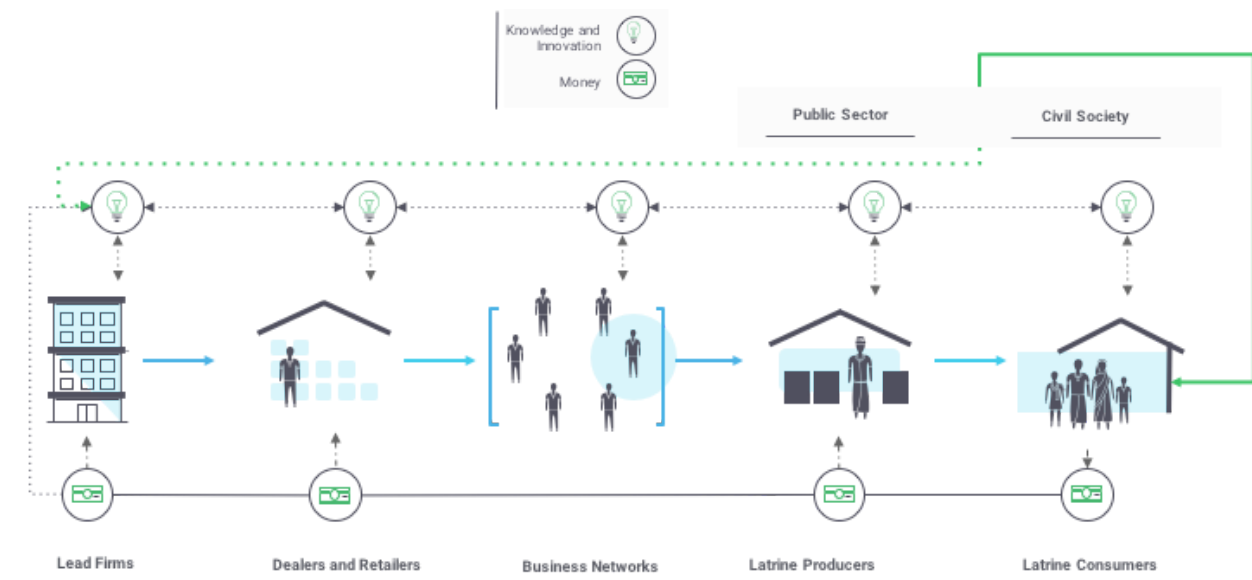


Figure 6: Rural Sanitation Market Map

3.2.2 Types of Latrines

The proportion of plastic and fiber pans used by households in the SUSWA project area is remarkably high. The plastic pans manufactured in Nepal looks very similar to ceramic pans and are lightweight, cheap, and easy to transport as compared to ceramic pans. The plastic and fiber pans were largely promoted during pre-ODF campaigns and were primarily distributed by

development organizations and government agencies. The ODF campaigns helped tremendously in the adoption and use of latrines in the Karnali region. The continuous and rigorous efforts of multiple organizations lead to the declaration of ODF in Karnali. However, very little effort has been there to quality latrines and sustainable sanitation. The teams also observed that construction by unskilled labor and households themselves resulted in improper latrine construction. Many existing latrines have improper pan installation, latrine location, the dimensions of the latrines (very small, very big, low height, narrow space), and improper light and ventilation, which ultimately needs improvement at present and in the future.

The below table summarizes the various kinds of materials that households have used to build latrines:

LATRINE PARTS	MATERIALS USED
Pit	Dry stone wall, circular (mostly), and rectangle shape
Pit Cover	Flat stone, wooden planks, cement slab
Superstructure	Mud-stone masonry, dry-stone masonry, stone masonry, wooden planks, brick masonry, CGI sheet
Roof	CGI Metal sheets, stone slate, mud, and stone flat roof (mostly in snowfall regions), RCC slab
Pan	Plastic pans, fiber plastic pan, ceramic pan, and commode (in city area and hotels)

3.2.3 Product and prices

The latrine products are available in the market centers but the quantity is very limited. The sanitation business is not a standalone business in most of the market centers. The hardware shops are offering multiple items: pans, cement, and CGI sheets whereas utensils shops are only selling latrine pans (mostly plastic pans). The plastic pans are easily available in the upper region, where public transport was very difficult in the past.

The prices of the product in the case of the Dolpa, drastically dropped after the direct road connection was constructed from Nepalgunj to Dunai, a Dolpa district headquarter. Before that, the average transportation cost was about Nrs. 80/kg for heavy-weight items like cement and lump sum for lightweight and space-requiring products like water tanks. Even prior to that, the private sector used to charter helicopters which used to be even more expensive, used to be around 220/Kg. There are still two places - Tallu bazar (where the bridge construction is ongoing) and Chhalgadh which is also called Kanchhi Bazar will have its transportation challenged during the monsoon season. During the monsoon season, the material must be unloaded and transported by laborers to cross the river.

The following table shows the variation in product prices with respect to marketplaces.

TABLE 4: TYPES OF LATRINES AND PRICES		
Types of Latrines	Karnali Corridor Market	Bheri Corridor Market
Plastic pans and fiber pans	<ul style="list-style-type: none"> Nepalgunj, Banke (A regional Market hub) - Nrs. 600/Pics Rakam, Dailekh - Nrs. 750/Pics Manma, Kalikot - Nrs. 800/Pics Nagma, Jumla - Nrs. 850 Jumla Bazar - Nrs. 850 	<ul style="list-style-type: none"> Nepalgunj, Banke (A regional Market hub) - Nrs. 600/Pics Salli Bazar, Salyan - Nrs. 850/Pics Kalimati, Jajarkot- Nrs. 700-800/Pics Tallu bazar, jajarkot - Nrs.700-1000/Pics Dunai, Dolpa - Nrs.1200/Pics
Ceramic pan	<ul style="list-style-type: none"> Nepalgunj, Banke (A regional Market hub) - Nrs. 800-5,000/ Pics Rakam, Dailekh - Nrs. 1100-1600/Pics Manma, Kalikot - Nrs. 1100 Nagma, Jumla - Nrs. Jumla Bazar - Nrs. 1200 	<ul style="list-style-type: none"> Nepalgunj, Banke (A regional Market hub) - Nrs.Nrs. 800-5,000/ Pics Salli Bazar, Salyan - Nrs. 1100/Pics Khalanga, Jajarkot- Nrs. 1000/Pics Kalimati, Jajarkot- Nrs. 1000/Pics Dunai, Dolpa - Nrs.2000
Commode	<ul style="list-style-type: none"> Nepalgunj, Banke (A regional Market hub) - Nrs. Multiple ranges and brands. Rakam, Dailekh - Nrs. On-Demand only. Manma, Kalikot - Nrs. On-Demand only. Nagma, Jumla - Nrs. On-Demand only. Jumla Bazar - Nrs. 9,000-18,000 or on Demand 	<ul style="list-style-type: none"> Nepalgunj, Banke (A regional Market hub) - Nrs.Multiple ranges and brands. Melkuna, Surkhet - Nrs. 12,000-35,000 (on demand) Salli Bazar, Salyan - Nrs. (>15,000) on demand. Khalanga, Jajarkot- Nrs. On Demand only Kalimati, Jajarkot- Nrs. On-Demand only Dunai, Dolpa - Nrs.>15,000 (on demand only)
Cement	<ul style="list-style-type: none"> Ghorahi, Dang (Cement manufacturing district): Nrs. 550/Bag (OPC) Rakam, Dailekh - Nrs. 850/Bag Manma, Kalikot - Nrs. 1000/Bag(OPC) Jumla Bazar - Nrs. 1150/Bag 	<ul style="list-style-type: none"> Ghorahi, Dang : Nrs. 550/Bag (OPC) Salli Bazar, Salyan - Nrs. 750/Bag (OPC) Dunai, Dolpa - Nrs.1200-1400/Bag
Iron Rod	<ul style="list-style-type: none"> Rakam, Dailekh - Nrs. 120-124/Kg Jumla Bazar - Nrs. 123-126/Kg 	<ul style="list-style-type: none"> Salli Bazar, Salyan - Nrs. 120/Kg Dunai, Dolpa - Nrs.140-150/Kg
CGI	<ul style="list-style-type: none"> Rakam, Dailekh - Nrs. 13500-15000/Bundle 	<ul style="list-style-type: none"> Salli Bazar, Salyan - Nrs. 12,700/Bundle

- Jumla Bazar -
Nrs.13500-15500/Bundle

- Dunai, Dolpa -
Nrs.14000-17000/Bundle

3.2.4 Nepalgunj is a major market center for sanitation products

Although Surkhet is the province capital for the Karnali province, Nepalgunj is the main regional market center for Karnali province which covers both Bheri and Karnali corridor. The retailers from all the districts demand sanitation products directly from Nepalgunj because importers/wholesalers are almost located in Nepalgunj as it is close to the India border and they find desired products at a relatively cheaper price compared to Surkhet. Both retailers and consumers perception is that the Surkhet market is expensive and lacks better transportation services as compared to Nepalgunj.

While various businesses in Nepal produce cement, steel, corrugated galvanized iron/steel sheets, and plastics, but when it comes to ceramic goods they still prefer imports than the local production. Ceramic items are imported from China and India, with a 15% customs duty. The majority of importers are based in Kathmandu or the Terai border towns, and they then supply wholesalers and retailers all over the country. The Terai border crossings are typically the entry points for imported goods (such as pans and tiles) from Gujarat and Rajasthan in India and China.

The imported plastic goods are subject to a 30% customs duty, which promotes domestic manufacturing (UNICEF, 2020). In Karnali, cement comes mainly from Dang districts where a number of cement manufacturers are located, steel and CGI sheets from Birgunj, and plastic from Nepalgunj and Bhairahawa. There are 5-6 plastic companies within the Nepalgunj area. The plastic and fiber pans are manufactured in the Butal and supplied to Nepalgunj wholesalers and then to the Karnali districts.

3.2.5 Lack of Latrine Producers

The latrine products are sold primarily by hardware shops and utensils shops and the majority of the latrine installation in the villages is done by self-learned masons. These hardware shops are not well informed about various latrine technologies available in the market. Further, the self-learned masons in the village don't have adequate knowledge of building latrines or houses. They practiced conventional methods of building houses which are also one reason they practiced the same with building latrines. Due to that reason, most of the latrines in the villages are not well structured and engineered, don't have proper planning, have unsafe safety tanks, use local materials which are not durable, and lack safety sides. The organization that provided the subsidy on latrine products did not develop a trained mason a decade back.

3.2.6 Sanitation business is not standalone business

In the areas we visited, we observed that hardware and utensils shops are the major businesses that offer sanitation-related products. As plastic and fiber pans are add-on items for utensil shops, the sellers are often not motivated to drive the sales of these products. Similarly, for the hardware, the main business comes from the hardware items such as cement, iron, CGI sheet, and so on, sanitary business contributes only 15-30% of their total business. These businesses seem to focus on varieties of commodities but less on quantities to attract a variety of customers with different needs.

3.2.7 Disadvantages of the Credit Sales Strategy

For any business, it is essential that they have offer to certain credit sales to attract customers, increase sales and retain customers. In Karnali, these shops both hardware and utensils have been offering credit sales. But, credit sales to individuals and government projects in this region continue to be an issue in terms of timely repayment.



Retailers continue to offer credit sales, as they are worried they will customer, personal relationships. This is further exaggerated by COVID-19 and its impacts, that the sales volume have decreased by 50% in some of the retail shops. The deferred payment has increased as people do not have enough savings to tap into and banks are not providing loans. In discussions, we also found out that some retail owners have started side businesses like agro-business, real estate, and so on.

3.2.8 Covid-19 impacted all

The retailers and wholesalers have all been impacted by the COVID-19 pandemic. Those households who were primarily dependent on the remittance or income from seasonal migration to India struggled and had no income due to the lockdowns. Although the risks of COVID-19 have subsided, the retailers and wholesalers who operate their businesses on loans, are still suffering from the decreased sales. The major challenges are

- Decrease in sales and cash flow
- Liquidity crisis in financial institutions and increased loan interest rates. Banks are also not providing sufficient loans

- Credit sales and problems in credit recovery
- Dealers/ suppliers are not giving material in credit after COVID-19

3.2.9 Transportation is a major issue for the latrine business

Hardware business owners are likely to suffer due to the poor road condition in this region as during the transportation sometimes there are chances of the product being damaged which the owner will have to bear and if broken or damaged it is not compensated by the wholesaler business. Wholesale takes risk only at the time of selling the product where the retailer will have to inspect product before loading the products. And also the transport owner does not take any responsibility for the product damage.

3.2.10 Business expansion opportunities

The increased road access in the districts has created an opportunity for business expansion in the districts and the villages. Also, the new federal government system plays a vital role in market establishment and expansion as all the services are available in the Municipalities as the flow of people directed toward the municipality from the district headquarters. With increased road accessibility, decentralization, and access to information, the market is becoming competitive in Karnali.

After decentralization, it created an opportunity to establish a new business in the municipalities and rural municipalities which resulted in a competitive market for the existing business located in district capitals. There are 4-6 retail stores on average available in the municipality. People now have more choices and knowledge on products due to access to information from varieties of sources like social media, ads, campaigns, and so on. But, the business does not have a proper plan to inform people regarding new products and the promotion of their products to their consumers except for some bigger businesses who participate in promotional activities such as trade and fare, and exhibitions.

3.3 Enabling Environment

3.3.1 Inadequately trained mason or self-trained

The majority of the latrine installation in the villages is done by self-learned masons. Further, the these self-learned masons in the village don't have adequate knowledge of building latrines or houses. They practiced conventional methods of building houses which are also one reason they practiced the same with building latrines. Due to that reason, most of the latrines in the villages are not well structured and engineered, don't have proper planning, have unsafe safety tanks, use local materials which are not durable, and lack safety sides. The organization that provided the subsidy on latrine products did not develop a trained mason a decade back.

3.3.2 Subsidy mindset still exists

The latrine was built with partial support from the development organizations and local government during the ODF movement. The non-local materials such as pan, pipe, and a cement bag to share with 2-3 households were distributed to the users to build their latrines. Along with other awareness campaigns, the distribution had made it easier to encourage the households. For building or upgrading to new, there is still expectations



for similar support. Similar to users, other stakeholders also have a subsidy mindset. There are multiple subsidy programs that the government offers like agriculture machinery, solar energy, and so on.

3.3.3 Environmental challenges

The major environmental factor that is affecting the region are landslides, snowfall, and floods. The intensity of the erratic rainfall accompanying with landslides sometimes damages the assets and sometimes it's life-threatening. The people mostly suffer from frequent power cuts, water scarcity, and difficulty in movement/transportation. The climate condition in this region is so harsh that it also affects agriculture production which results in food insecurity for the people. During the peak winter season, construction, as well as other works, are halted due to difficult working conditions like low movement, low availability of labor, and less productive work which is also a major reason for people migrating to India for work.

3.3.4 Safe disposal awareness on fecal sludge

There is a lack of awareness or inadequate knowledge in the community regarding the disposal of fecal sludge. The community tend to clean their pit or septic tanks only by using their bare hands and with the support of a bucket. Some of them use safety precautions like face masks and plastic gloves but the majority of people do not use any safety precautions. They are directly disposing of the sludge in the field and letting it dry. Few of them use secondary pit (double pit) safety tanks to dispose of.

3.4 Menstruation Hygiene Management (MHM)

3.4.1 Social Taboos on Menstruation Hygiene Management

Social taboos around menstruation were identified as a key barrier in both Bheri and Karnali Corridors. There seems to be discriminatory practices, such as not allowing women to touch the taps, use toilets and consider them impure. Families forcing women and girls to sleep in cow/sheep/goat sheds, were less prevalent in the highlands (upper parts of Humla, Mugu, Jumla, and Dolpa) than in the lower parts of these districts. It is clear that discriminatory practices are more prevalent in the Karnali corridor than in Bheri and women in Karnali face more discriminatory practices and the restrictions on the use of household latrine.

3.4.2 Free sanitary pads but safe disposal is still a concern

Adolescent girls in the villages are receiving free disposable sanitary pads from school which is a great initiative by the Government of Nepal (GoN), yet we observed that they lack adequate knowledge on safe disposal of the pads. Most of the girls and women are disposing of these sanitary pads in the field, school latrines, streams.



Due to the lack of proper awareness of safe disposal of sanitary pads, we observed lots of sanitary pads in and around the community places and we also saw that school latrines are unusable due to blockage in the pan.

3.4.3 Inconsistent pricing of sanitary pads in the market

The market we visited had an ample number of pharmacy stores and were selling varieties of pads but the prices varied depending on the manufacturer and quality. So obviously women and girls preferred to buy the cheaper ones as it is affordable and they don't have an idea of the quality. Most of the pharmacy stores on the main highway responded that their customers are women and girls who are traveling through the highway. We also got the insight that women prefer to buy disposable sanitary pads for travelling purpose, other than the common practice is that they still use cloth.



4. Recommendations


The following section summarizes the recommendations based on the findings from the HEAR phase. These recommendations are disaggregated by implications for people (individuals for whom the solutions will be designed), the sanitation solution (product) and services (including enabling environment, behaviour change communication) that would enable effective uptake of a sanitation solution. The following recommendations are as such:

- Intervention related to improving the standard of the latrine, enhancing local mason's skills, strengthening the supply chain, and increasing the awareness of the people for better use, maintaining hygiene, and operations and maintenance of the latrine;
- Currently, manufacturers and wholesalers are unaware of the various community preferences and are not connected with local suppliers/traders. Demonstration or marketing of sanitation products and services would be required;
- All aspects of sanitation and hygiene, social and discriminatory practices, and community engagement and mobilization must be considered and prioritized during the construction of the water supply system;
- Interventions to build the capacity of local governments and provide skills at the local level for developing good masons with hands-on skills for installing high-quality latrines and plumbing would be required. Establishing sanitation statistics monitoring mechanisms at the local government level that give market knowledge on sanitation and encourage private sector involvement;
- Continues efforts to promote sanitation-related learning, collaboration, and dialogue.
- Intervention regarding safe disposal of the sanitary pad at the school and household level is essential; and,
- Proper coordination, cooperation, and communication between stakeholders to amplify the impact of the program and activities.

4.1 Product and service offering

Availability of product options, awareness of the features and proper maintenance of these options is crucial to ensure sustainable use of improved sanitation products and services.

- **Simplify the construction and upgrading process** - Purchasing, building, or upgrading a latrine is a time-consuming and complex task. Simplifying the purchase process and ensuring the product or services would lead to households having access to products, skilled human resources. This would further ease the barriers for households to make the decision on the purchase or upgradation of the latrines.
- **Piloting of Sato Pans** - The usage of latrines and maintaining hygiene are made more difficult in areas with scarce water resources. In order to contextualize the opportunity for individuals to adapt or use the toilets and to reach those user segments that are frequently overlooked. There are some opportunities for SaTo Latrine technologies in



areas with scarce water and scarce land. The SaTo Latrine technology, is a low-cost, direct or offset latrine technology that ensures hygiene through an innovative water seal⁶. The pan is low-flush and its bright color is suitable for individuals with challenged vision. Two other complementary products can be used with SaTo to make it offset: 1) collection box and SanBox. All three quality components are manufactured by RFL plastics. SaTo and Collection Box are patented by LIXIL.

- **Design for different situations but keep the product or service offering simple and limited – less is more.** - Simplification of the product service offering across different situations may be achieved through a modular or modifiable product. Limiting choice is critical for simplifying the decision-making process of people. It also greatly simplifies marketing, sourcing, distribution, and training of masons and sales agents.
- **Be affordable but stay aspirational:** Medium and low-income rural households are the target market. Product options must be affordable but also must meet their tastes and desires. The product offering must be an aspiration and aesthetically pleasing to trigger purchases and satisfy consumer desires. Cost reductions for affordability need to be balanced.

4.2 Product sales and promotion

- **Use existing networks of influential people:** Networks of trustworthy individuals are already active in the villages and play important roles in promoting sanitation. Promotional strategies should consider how these people can help disseminate information on and promote the sale of sanitation products and services.
- **Target both men and women:** Women are part of the decision making but men are the key purchase decision maker, they each need to be targeted using messages tailored to their specific needs, desires, and motivations.
- **Target receptive times in people's lives:** Harvest, returned from abroad, marriage, festival and monsoon season are times when people are most receptive to the idea of building or upgrading a latrine because of the economic, social, and environmental factors for purchase motivations they experience. Sales and promotional activities need to be planned in a way to take advantage of these times.

⁶ A waterseal is a water barrier between the pit and the open environment. A functional waterseal is critical to ensure the health impacts of latrines. This seal is often through a cup trap or syphon (p, q or s); however iDE recommends a trap door seal which decreases the chances of breakage because of the innovative design. Seals sometimes break due to natural wear and tear but most often due to users not understanding the point of a seal or trying to unblock a pipe by ramming a broom handle through the seal and piercing it.

- **Go where people are. Don't make them come to you:** Businesses need to bring products and services to the people, meeting them in their villages. Access to transportation, markets, and information is a challenge for most rural households. Most villagers do not bring adequate cash to central markets to purchase more than their daily needs. Moreover, larger purchases often require family discussions and may require borrowing money—interactions that can only happen in the village. By bringing solutions to where villagers live and where they spend the majority of their time, businesses can overcome key purchase barriers of time and complexity of the purchase process.

4.3 Social Marketing

- **Message around themes that will motivate:** People are not motivated by just health. Safety, convenience, status, and other factors help drive improve latrine, use, and maintain hygiene. Social marketing messages should draw on themes that actually drive households to purchase or upgrade a latrine.
- **Develop social marketing messages and tools the private sector can use. :** When a business sells latrine products they are not just selling the physical product, they are selling the benefits using the product gives and they are selling to the purchase motivations. Developing social marketing tools that businesses can use will make it easier for them to sell more latrine products.
- **Encourage leading by example:** People follow the behavior of those they look up to. If the wealthy, government, and village influencers have improved latrines the rest are more likely to follow.
- **Follow-up and follow-through:** Social marketing initiatives need to be more than one-offs to motivate people to change their behavior.

4.4 Enabling Environment

While linkages refer to one-to-one connections between the market and supporting actors, enabling environment activities to include multi-stakeholder initiatives as well as focused engagement with other NGOs towards the goal of creating harmonized industry efforts to scale up the provision of improved sanitation products and services. The local public sector has historically been very engaged in WASH activities through awareness-raising activities, and subsidy models. During the deep dive, the project team identified the need for different forms of public-private-NGO sector collaboration. The project should promote public-private development platforms (PPDPs), and coordinate awareness-raising through collaborative platforms with NGOs and the public sector.

- **Public Private Development Platforms:** Greater collaboration and coordination between local levels of government and sanitation businesses allow both parties to identify opportunities to collaborate that result in more households building improved latrines.
- **Update household-level latrine status data:** The local government needs information regarding the status of the latrine for planning purposes. They could use their government channels for information gathering while providing evidence-based planning for both the public and private sectors.
- **Multi-stakeholder engagement:** Both the public and private, NGOs and INGOs, political parties, civil societies, local groups, financial institutions, individual professionals, and so on, must be brought together for a better understanding of improved and total sanitation.

5. Next steps

As part of the next steps, the team will pilot the rapid prototyping process in Karnali Province. As part of the rapid prototyping process, we will test four installations. The team has selected Tripurasundari Municipality for prototyping and demonstration after discussions with the SUSWA team. The municipality has been chosen based on the following :

- the supportive and responsive local government,
- the availability of local materials (sand and aggregate),
- the community's willingness to contribute, and
- the opportunity to showcase to upper Dolpa people because it is a route to Dunai and upper Dolpa and to bring learning to lower parts.

iDE Bangladesh's WASH Technical Team will be supporting the team during this pilot phase. One of the aspects of this exercise is to identify what "could go wrong" in installations. This can include broader problems, but also local interpretations and variations on technology designs.

6. Annexes

Annex-1 : iDE's countrywide sanitation program strategy and sanitation marketing

iDE has worked in six countries to build markets that can deliver sanitation solutions that people want and can afford. The specific approach to sanitation marketing varies from country to country based on local market conditions. Following are the sanitation marketing strategies adopted in different countries :

iDE Countries	Problem	Approach	Users need	Product	Place	Promotion
Nepal	People were willing to buy, but had limited or no access to quality sanitation products. It took many steps to buy, build and install	Local NGOs build latrine business owners' capacity to provide "one-stop" manufacture and install services, and train sales agents in direct sales techniques.	Users need a better way to buy a quality toilet that is easy to transport and maintain.	The Nepal Easy Latrine, an offset pit latrine with attractive slab for easy cleaning.	Sales agents sell toilets directly to individual households and in community gatherings. Latrine business owners are located close to communities for easy transport.	Invest in a quality toilet that keeps your family safe and that you can be proud to own.
Bangladesh	Lots of people have toilets, but most are unhygienic and smelly.	Design affordable, hygienic solutions. Connect large national lead firms with local producers and installers in the field.	Users want their waste separated from their environment and minimize space too.	Direct and offset pit latrines using innovative components such as the SaTo Pan and SanBox	Product sales are led by local latrine producers through sales agents in village meetings and through farmer groups.	If you hear the tak*, you know it's safe. *Sound of the pan closing
Cambodia	Most households did not have toilets	Aggregate parts for easy production	Users want a convenient way to	The Easy latrine can be sold with	Manage a professional	Buy a high quality, status-enhancing

	and the sanitation supply chain was fragmented	and distribution.	purchase quality pour-flush products that convey status to their families and communities.	one of the following shelter choices. 1) Ring Shelter 2) Easy Shelter	salesforce to sell directly to households and in village presentations.	product without having to leave your home. Installation included.
Vietnam	Many rural households didn't have toilets and were in the market for high quality (but expensive) toilets with septic systems.	Provide government worker with training and ongoing assistance to implement the sanitation marketing approach	Users want a quality toilet preferably with a septic system.	An affordable septic-system toilet with various pan and flushing options	Representatives from the Women's Union and Center for Preventive medicine sell directly to household and villages	Toilet are not as expensive as you think !
Ghana	Most toilets in rural areas are poor quality and subsidized by NGOs. This is a far cry from the high quality flush toilets found in urban areas.	Establish a hybrid social enterprise that sells a branded product which is aspirational but affordable.	Users need an aspirational toilet with financing options that allow them to pay bit by bit.	The sama sama product is a pour-flush offset pit toilet with a handwashing station.	Sama Sama sales agents use door-to-door sales and marketing strategies for reaching customers.	Sama Sama provides your family with an affordable, clean, pour flush toilet, fully installed at your home.
iDE Ethiopia	Many households have unhygienic and low quality toilets. Supply chain is very fragmented and transport is slow and expensive	Demonstrate business model viability and build public and private sector capacity to scale	Users want a sturdy pit with a slab that looks nice and is easy to keep clean.	Circular slabs with pit-hole covers and optional pit lining to prevent collapse.	Sales agents sell directly in villages and at market days with support from government and health extension workers.	Buy strong, modern toilets to create a clean environment to keep your family and community healthy.