

# 2022 ANNUAL REPORT

SEMA  
REPRODUCTIVE HEALTH

# MESSAGE FROM THE EXECUTIVE DIRECTOR

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Dear friends,

I am thrilled to share SEMA Reproductive Health's first Annual Report with you. As I reflect back on 2022, I'm so proud of all that the SEMA team has accomplished alongside our partners around the world in our first full year of operation.

From building our team to launching our Healthy Markets Framework to assessing country and product SRH markets, we have made great strides toward our mission of building healthy, equitable and resilient markets that meet the sexual and reproductive health needs of all people – especially women and girls.

Thank you to the Governing Body members, Technical Oversight Committee, core partners, and staff who worked tirelessly this year to help SEMA get up and running. I look forward to seeing all that we accomplish together in 2023 and beyond.

Best,



**Blair Hanewall**  
Executive Director



Over the last decade, the sexual and reproductive health (SRH) community of actors has increased access to lifesaving SRH products through landmark funding commitments and multi-stakeholder initiatives for methods like the contraceptive implant and injectables like DMPA-SC. However, access remains out of reach for many. 218 million women in low- and middle-income countries (LMICs) who want to avoid or delay pregnancy are still not using modern contraceptives,<sup>1</sup> and approximately 810 women die every day from causes related to pregnancy, childbirth, and unsafe abortion.<sup>2</sup>

Efforts to address this gap need to recognize that the SRH landscape is also in transition. As demand rises, consumer demographics and preferences are evolving, and the role of the private sector and new service delivery models is increasing. A growing pipeline of new technologies also promises to better meet consumer needs. On the financing side, the potential for future growth in donor funding is uncertain, and the role of public and private national sources will need to increase rapidly.

These trends bring both risks and opportunities. They demand a more purposeful, forward-looking, and comprehensive approach to understanding and managing the complex ways SRH products are financed, manufactured, bought, and delivered. Recognizing this, a group of country and global stakeholders came together in 2021 to launch Shaping Equitable Market Access for Reproductive Health (SEMA). SEMA is a collaborative platform and financing vehicle with a simple goal: improving SRH markets to meet consumer needs. SEMA will deliver this by: (i) strengthening countries' market stewardship and national SRH market outcomes; (ii) improving the performance of the global SRH product ecosystem to support local markets; and (iii) driving interventions with partners to address product-specific market challenges. If successful, these efforts will enable stakeholders to implement coordinated, data-driven strategies that deliver healthy, equitable, and resilient SRH markets so that women and girls can control their health and futures.

SEMA works at the **country**, **ecosystem** and **product** levels to transform the performance of SRH markets. We see markets as systems where actors engage in economic exchange, including the flow of information, products, and money. For this reason, we focus on the following:

- **Data and analytics:** We ensure stakeholders can access public and private market data (including consumer insights) to monitor market health and inform decisions such as on research and development (R&D), procurement, and pricing.
- **Market management:** We ensure global and national stakeholders have the capacity and mechanisms to identify and respond to product market issues.
- **Procurement strategies:** We ensure country procurement actors (public and private) have strategies and tools to secure long-term access to affordable and quality products.
- **Financing policies:** We ensure countries implement policies that support a shift toward domestic financing and that are equitable and sustainable for the public and private sectors.

<sup>1</sup> Guttmacher Institute, 2020. Investing in Sexual and Reproductive Health in Low- and Middle-Income Countries, Fact Sheet. <https://www.guttmacher.org/fact-sheet/investing-sexual-and-reproductive-health-low-and-middle-income-countries>.

<sup>2</sup> World Health Organization, 2019. Maternal Mortality, Fact Sheet. <https://www.who.int/news-room/fact-sheets/detail/maternal-mortality>.

## COUNTRY LEVEL

During SEMA's inaugural year of operations, we initiated our work to support governments in stewarding their national SRH markets. In 2022 we:



Developed, tested, and adapted the Healthy Markets Framework for assessing country SRH market health performance.



Aligned country stakeholders on this market shaping methodology.



Commissioned partners – including Recherche pour la Santé et le Développement (RESADE), the Clinton Health Access Initiative (CHAI), and PharmAccess – to lead development of preliminary market assessments and align stakeholders on priority market shortcomings in Burkina Faso, Senegal, and Nigeria (federal and state levels in Osun, Lagos, Niger, Ekiti, and Kaduna).



In 2023, SEMA will continue funding these partners to develop and align stakeholders on national market strategies. Over time, we will also invest in local capacity and interventions to enhance country market management capabilities in areas including:

- **Data** – especially consumer insights and private sector data where relevant;
- **Analytics** – such as strategic demand forecasting, designing procurement strategies to address supply security, and comparing current service provision to consumer trends;
- **Financing** – such as linking countries to global funding mechanisms to support sustainable financing and sharing lessons learned on equitable price structures in public and private sectors;
- **Market strategies** – such as supporting the introduction of new contraceptive technologies.

We will know our efforts are successful if: (i) governments use country-specific trends and market data, including private sector information, to develop and implement market strategies addressing issues such as which products to introduce, where to source them, how to procure them, and how to integrate them into financing policies and supply chains; and, (ii) we see improvements in national market conditions such as more sustainable financing or pricing, procurement of quality products in the public and private sectors, or timely adoption of innovations.

## ECOSYSTEM LEVEL

Many SRH market functions and interventions need to be delivered at regional or global levels. SEMA is therefore also working to strengthen the broader SRH ecosystem's capacity to monitor and address SRH product market issues. As part of this, SEMA is initially focusing on four critical functions:

### 1. Market monitoring and analytics

SEMA is working with partners to establish a comprehensive, go-to market monitoring and analytics function for SRH markets that looks beyond donor priorities to consider the needs of public and private country actors. Currently, market data is fragmented. Often actors only invest in data for a subset of focus countries or priority products, and private sector data is a crucial gap. In 2022 we:



Built stakeholder alignment on the need and benefits of a cross-product monitoring function.



Invested in Maisha Meds to test the use of export data to better size private sector markets.

In 2023, SEMA will work with additional actors such as the Reproductive Health Supplies Coalition (RHSC) to design and produce a State of the Market Report, set up a strategic forecasting hub, and initiate routine market monitoring, including analyzing the global flow of active pharmaceutical ingredients and products to understand the total SRH market. Over time, we will continue working with stakeholders to synthesize and share critical data, develop cost-effective ways of gathering private sector information, design analytical tools such as cross-product strategic demand forecasts, and disseminate reports on SRH product R&D, the supply base, and pricing. We will know our efforts are successful if global and country actors continuously use market data to identify, align on, and address market issues.

## 2. Product market management & coordination

SEMA is working to ensure product market strategy is developed by a more diverse set of stakeholders, including country representatives, and that certain areas (e.g., product adoption, private sector integration, and self-care) are managed in a cross-product way. Currently, SRH market shaping initiatives are single-product and donor-driven. In 2022 we:



Invested in Market Access Africa to organize a cross-product introduction and expansion design working group that developed recommendations on opportunities for cross-product efficiency.



Aligned stakeholders on the need for a strengthened architecture for market stewardship that increases efficiency and coordination, is better equipped to serve the needs of different SRH stakeholders (especially countries), and can ultimately improve access.

In 2023, SEMA will work with existing product-specific initiatives (e.g., for hormonal IUD, injectables, implants, and medical abortion) to continue to build alignment behind a shared vision of transformation and to design and establish initial elements of the architecture. Over time, we will drive the transition toward cross-product approaches for functions like oversight, market monitoring, demand forecasting, and new product introduction and expansion. We will know our efforts are successful if countries have the capacity, tools and mechanisms to oversee their own markets and if the wider SRH access community is working in a more efficient and genuinely cross-product way to monitor and manage priorities at all stages of the product life-cycle. This will be measured by the faster rollout of new technologies and more timely resolution of market challenges and risks.

## 3. Procurement strategies

We expect to see a transition in the procurement and supply of SRH products to country actors (both public and private) over the coming decade. However, the procurement environment for these players is fragmented and incomplete, contributing to issues regarding supply security, quality, and affordability. SEMA is working to ensure these partners have procurement tools and strategies. In 2022 we:



Scoped opportunities to establish a commercially sustainable venture that could be a third-party vendor to public and private buyers struggling to access affordable supply.

In 2023, SEMA will co-design and test the viability of this mechanism and aim to deliver a multi-year business plan for potential investors. We will know our efforts are successful if country public and private buyers can achieve a secure supply of quality products at sustainable prices.

## 4. Financing policies


Limited financing is a crucial challenge for SRH and the health sector more broadly. Donor financing is unlikely to keep growing over the next decade and has shown signs of fragility. Meanwhile, national financing is not growing fast enough to fill the gap and meet evolving consumer needs. The community is working tirelessly to plug this gap through advocacy and directly mobilizing resources.



In 2023, SEMA hopes to explore how we can provide technical assistance or work as a broker to ensure countries can leverage global financing mechanisms. And, over time, our interest is to support countries to design and introduce pricing policies and strategies across public and private sectors. We will know our efforts are successful if countries achieve sufficient and sustainable product financing with fair pricing.

## PRODUCT LEVEL

Since country SRH markets need well-functioning product markets, SEMA is working to ensure stakeholders are sufficiently coordinated to ensure robust supply security, sustainable and affordable prices, and in-country enablers for timely and rational product adoption and access. In 2022 we:

-  Developed, tested, and adapted the Healthy Markets Framework for assessing product market health and performance.
-  Completed a product scan to identify priority market challenges and opportunities.
-  Commissioned assessments for hormonal IUDs, injectables, and medical abortion markets.
-  Designed an investment to sustain ongoing efforts to monitor hormonal IUD supply and demand.

In 2023, we aim to secure additional funding to implement a subset of interventions identified through the 2022 assessments, such as late-stage commercial planning for generic DMPA-SC and strategies to expand access to medical abortion. Moving forward, we will also continue to monitor the state of product markets over time, hoping to identify and drive responses to challenges and opportunities. We will know our efforts are successful if we can: bolster supply security by increasing the number of suppliers; achieve affordable and sustainable prices; increase the percentage of quality products in the market; and, improve the timely adoption and expansion of new products.



Since its launch, SEMA has hired seven permanent staff (with five of seven based in Africa), and nine staff are expected to be in place by the end of Q1 2023. SEMA is currently being incubated by Amref Health Africa and has benefitted hugely from Amref's organizational capacity across its HR, finance, and procurement functions. Both organizations are grateful for the fruitful and collaborative partnership. SEMA is also appreciative of partnerships it has developed with the Reproductive Health Supplies Coalition, FP2030, USAID, UNFPA, and many technical partners.

Over the last year, SEMA has also stood up its Governing Body and Technical Oversight Committee and worked to embody our original design principles. We were, and will continue to strive to be:

- Consumer-centric and country responsive.** One way we demonstrate this is through the composition of our leadership team. In 2022, 58% of SEMA's leadership team (including the Governing Body and Technical Oversight Committee) were female, and 47% were from LMICs. We also show this through the location of our implementing partners. Over the last reporting period, the percentage of sub-awards SEMA issued to locally owned and managed operations was 75%, exceeding our target of 50%, and the value of these sub-awards as a percentage of our total sub-award value was 83%, also exceeding our 50% target.
- Mission-driven and transformative.** We demonstrate this by co-designing evidence-based market interventions – including three designed last year related to hormonal IUD and private sector data generation.
- Results-oriented and evidence-based.** We demonstrate this by completing market assessments. Last year we completed one market assessment, and another five are underway.
- Inclusive and curious.** We demonstrate this by setting up multi-country stakeholder groups with LMIC participation (at least two representatives). In 2022, we set up a product introduction design working group and a cross-country group for reflecting on national market assessments.
- Platform and partner-oriented.** One way we demonstrate this is through the number of knowledge products we create and make available to the community. In year one, we disseminated eight products, including two SEMA webinars, four presentations at the International Conference on Family Planning, an overview of SEMA's new Healthy Markets Framework, and SEMA's strategy document.
- Nimble and adaptive.** One way we demonstrate this is by looking at our staff costs. Last year staff costs were 15% of our total expenditure, in line with our target of keeping costs below 30%.

SEMA BY THE NUMBERS IN 2022

58%

female leadership

47%

LMIC leadership

3

evidence-based market interventions designed

2

multi-country stakeholder groups set up

1

market assessment completed

8

products disseminated



# A LOOK AHEAD

SEMA is determined to build a new, more sustainable way of working that recognizes countries as the stewards of their SRH markets. In our inaugural year, we laid the foundations: we built stakeholder alignment on the vision, hired our leadership team, stood up our governance structures, designed a framework for tracking market performance, and identified priority investment areas. Moving forward, we will continue building these foundations, learning and adapting, expanding our scope and increasing our impact. We are grateful to our country and technical partners and donors for their support to date, and look forward to their continued partnership as we advance our shared vision of a world with healthy, equitable, and resilient SRH markets that allow women and girls to control their health and future.

