

LOOKING AHEAD

A Blueprint for Future SRH Market Transformation

DECEMBER 2023



SEMA
REPRODUCTIVE HEALTH

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SEMA (Shaping Equitable Market Access for Reproductive Health) was established with a pioneering vision to transform the way the reproductive health field approaches market shaping. The Sexual and Reproductive Health (SRH) community has long recognized that improving markets can save financial resources and enhance people's lives. Various factors, particularly the growing role of public and private national stakeholders and inefficient donor funding, led to a call for a new approach. SEMA aimed to test a new model that (i) pooled and aligned donor funding against a strategy to strengthen markets driven by the priorities of national stakeholders and (ii) established a platform to coordinate activities and strengthen country and other stakeholder oversight of the market.

Over the past two years, a small team has worked together to bring SEMA's vision to life. This involved establishing SEMA and charting its initial course and strategic priorities. During this period, the team had the privilege of working with numerous dedicated health professionals from Burkina Faso, Nigeria, and Senegal. The team also collaborated with the SEMA Governing Body, Technical Oversight Committee, and many experts from partner organizations. All these individuals have helped to identify SRH market needs and shaped the implementation and direction of SEMA.

SEMA was initially established as an independent organization with multi-year funding commitments to work across the global partner ecosystem. However, changes in the funding

landscape have made this model unfeasible and SEMA as a stand alone organization will wind down at the end of 2023. Donors are exploring options for continuing the work within other existing organizations. Despite these changes, SEMA's original vision remains relevant and we, members of the SEMA team, are pleased to share what we have learned, observed, and brainstormed with the SRH community over the last two years. We hope this information helps us all work together more effectively in the future to support equitable market access.

This report presents the identified strengths and weaknesses in the current state of the field, as well as gaps and opportunities to be addressed in future endeavors. It highlights the need for collaboration to understand market barriers better and promote healthy, equitable, and resilient SRH markets. Although SEMA's existing organization and governance will be transitioning, we believe there are many opportunities to maintain momentum and progress towards the recommendations outlined in this report.

This report aims to provide insights for donors, technical partners, and country stakeholders. **For donors** this summarizes the essential steps required to transform the SRH market ecosystem that is future-fit. This includes necessary changes to shift focus towards countries and ensure that the needs of end consumers are met. To support our recommendations, donors must deliver the following:

- **Provide** flexible funding through a pooled mechanism focused on strengthening country market stewardship capacity in response to the need in response to the need to monitor, analyze and transform national markets.
- **Coordinate** efforts to support access to market data and analytics in response to country needs for market monitoring and to provide holistic market visibility for a broad range of stakeholders.

- **Engage** in mechanisms that align stakeholders and donor funding around consensus SRH market priorities driven by country and consumer needs and facilitate a coordinated response among partners.



For technical partners, we hope this report provides clarity on how our vision could be achieved, with specific emphasis on how to ensure countries' needs are recognized and driving the global agenda. We would strongly encourage technical partners to:

- **Challenge** the traditional model of single donor-partner engagements, where the donor drives the agenda and does not coordinate efficiently and effectively with related efforts.
- **Actively** seek new ways to work across donors and partners to identify efficiencies, share know-how, and develop cross-cutting solutions in areas of diverse technical expertise.
- **Engage** in coordinated efforts to respond to country needs with flexible technical support that strengthens and enables sustained capacity at the country level.

For country stakeholders who are working tirelessly to improve access to SRH products and services, we hope this report adequately reflects the common needs and desires across a diverse range of country perspectives. SEMA has strived

to bolster the evidence to advocate for needed resources, and for a country-led approach to market strengthening. In order to achieve the recommendations outlined in this report, it is critical **country stakeholders**:

- **Advocate** for the needs of consumers, utilizing data to understand their needs where feasible.
- **Use** available data and evidence to inform market decisions to optimize the impact of limited resources and promote equitable access across public and private channels.
- **Identify** critical needs for market strengthening and advocate for funding and coordinated technical support that aligns with those needs to strengthen and sustain country capacity.
- **Explore** opportunities for regional or broader cooperation to learn from or collaborate in solving complex issues.

We hope this report serves both as a catalyst for optimism and a strategic guide for fostering equitable market access. Success hinges on ongoing analytics, improved coordination, and collective action to overcome barriers. SEMA is more than an organisation; it's an empowering idea to redefine SRH markets and propel our shared goal of accessible health for all, with an emphasis on women and adolescent girls. We thank you for your invaluable contributions to SEMA's development and look forward to your continued support in realizing this vision.

**Blair Hanewall,
Executive Director,
SEMA**

December 2023

ABBREVIATIONS

API	Active Pharmaceutical Ingredient
CAGR	Compound Annual Growth Rate
COC	Combined Oral Contraceptive
CS	Commodity Security
CSMR	Contraceptive Social Market Statistics Report
CTI	Contraceptive Technology Innovation
CYP	Couple Years of Protection
DMPA-IM	Intramuscular Depo-medroxyprogesterone Acetate
DMPA-SC	Subcutaneous Depot-medroxyprogesterone Acetate
ECP	Emergency Contraceptive Pill
FP	Family Planning
FP2030	Family Planning 2030
FCDO	Foreign Commonwealth and Development Office
HMF	Healthy Markets Framework
ISO	International Organization for Standardization
IUD	Intrauterine Device
KSM	Key Starting Materials
KG	Kilogram
LMIC	Low- and Middle-income Countries
MA	Medical Abortion
MNCH	Maternal Neonatal and Child Health
NQCL	National Quality Control Laboratory
NGO	Non-governmental Organization
PQ	Pre-qualified
QA	Quality-Assured
R&D	Research and Development
RH Viz	Reproductive Health Supplies Visualizer
RHSC	Reproductive Health Supplies Coalition
SEMA	Shaping Equitable Market Access for Reproductive Health
SMO	Social Marketing Organization
SRH	Sexual and Reproductive Health
UNFPA	United Nations Population Fund
USAID	United States Agency for International Development
VAN	Global Family Planning Visibility and Analytics Network
WHO	World Health Organisation

01

INTRODUCTION

Enhancing access to SRH products reduces cases of unintended pregnancy, unsafe abortion and maternal death. It also advances economic empowerment. Global efforts in the last decade have enabled 87 million additional women to access family planning (FP) products¹. As a result, 371 million women in Low- and Middle-Income Countries (LMICs) are now using a modern method of FP². However, 15% of women in LMICs who want to avoid or delay pregnancy are still not using modern contraceptives, with rates as high as 30% in some countries³, and approximately 810 women die every day from causes related to pregnancy, childbirth, and unsafe abortion⁴.

Access to SRH products is limited by a variety of factors, including restrictive policies, weak health systems, inadequate management of supplies, poor counselling, and societal norms. Moreover, progress in this area is hampered not only by social, political, and legal barriers but also by market conditions, such as high prices, inability to meet demand, a limited supply base, low-quality products, inadequate financing, and lack of technical and financial resources necessary to introduce and scale products in countries.

Strengthening SRH markets is an increasingly complicated challenge for several reasons. Demand for SRH products is rising, but public funding is stagnating. Consumer demographics and preferences are evolving, and the role of the private sector is increasing. The buyer landscape is also increasingly fragmented as financing and procurement shift to countries. In this context, there is an urgent need to

monitor and shape SRH markets to best meet health outcomes with the limited resources available. Inaction or allowing the status quo to persist would mean stalling progress towards providing equitable access to SRH products. This, in turn, risks eroding the gains of the past decade. Although stakeholders' efforts to strengthen the markets are well-intended, uncoordinated efforts may perpetuate existing inefficiencies, leading to sub-optimal outcomes and inefficient use of limited resources. Therefore, it is crucial to coordinate efforts, led by countries and their needs.



SEMA believes optimal market conditions cannot be achieved without **market stewardship**. **Market stewardship refers to the process of systematically and proactively monitoring the total market and driving coordinated, efficient and effective interventions to strengthen markets and ultimately improve access outcomes.** Although there are many discrete efforts underway to improve market conditions, this report maintains there is an urgent need to build market stewardship capacity with a particular focus on **market data and analytics** and **market management and coordination** with countries in the driving seat to be future-fit.

¹<https://www.fp2030.org/resources/2022-measurement-report-brief/>
²<https://www.fp2030.org/resources/2022-measurement-report-brief/>
³<https://www.fp2030.org/data-hub/>
⁴World Health Organization, 2019. Maternal Mortality, Fact Sheet.

Drawing from a year of research, we have compiled findings, triangulating evidence from specific product and country market assessments⁵, inputs from interviews and consultations with a range of global and country stakeholders, and analyses of new and existing data sources. While much of the available data and SEMA's first year of work focused on contraceptive products, and to a lesser extent, medical abortion (MA) products, we believe many similar challenges and opportunities hold true for maternal health products. In light of these insights, we propose three key recommendations for transforming market stewardship moving forward, in order to ensure women and girls have access to the products they need to control their health and future:

- 1 Strengthen country efforts to analyze and transform country markets** with increased financial and technical support
- 2 Transform access to more comprehensive market data and analytics**
- 3 Establish mechanisms to build consensus and drive coordinated action** on market priorities



⁵The full set of product and country assessments can be reviewed [here](#)

02

DEFINING A HEALTHY MARKET FOR SRH PRODUCTS

DEFINING A HEALTHY MARKET FOR SRH PRODUCTS

There are a variety of eco-systems that shape access to SRH products on a global, regional, national, and subnational scale. These include cultural norms, policies, regulatory systems, health systems, financing, infrastructure, supply chains, and markets. Markets exist where buyers and sellers exchange goods and services that can include public or private service delivery points as well as procuring products at the sub-national, national, regional or global levels. Markets are healthy when they are characterized by the following **market conditions**:

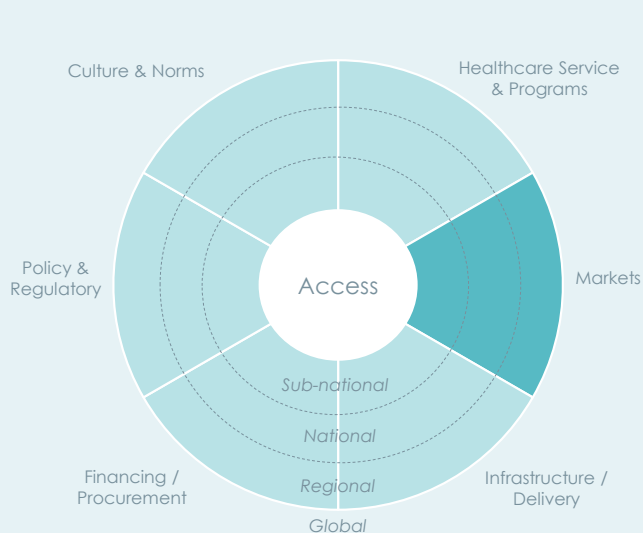
- Product design provision of a product mix that appropriately responds to **consumer demand** and preferences
- Sustainable and sufficient **supply** capable of meeting demand with an appropriate product mix across different service delivery points to enable consumer choice
- Resilient and equitable **financing** that meets the system's (including consumers') demand
- **Prices** that are equitably affordable across channels, geographies and social groups and are economically viable for suppliers

- Consistent, assured product **quality**
- An effective **product adoption** pathway for introducing innovations in a timely and rational manner that also responds to consumer needs

These conditions are inextricably linked to each other, adding to the complexity of interventions to support the overall health of the market. Improving these conditions requires a supportive ecosystem of related market institutions (e.g., regulatory, financing, supply chain environment) and effective **market stewardship**, namely the **process of proactively monitoring the total market and intervening to strengthen markets and improve access outcomes**. For SEMA, market stewardship requires:

- **Market data & analytics** ('warning system'): the availability and use of quality and comprehensive market data (i.e. public and private, supply and demand) among relevant country and global players who routinely monitor, analyze and draw attention to market shortcomings, risks, and opportunities.
- **Market management & coordination** ('response system'): the capacity and organization of stakeholders, both within countries, and across country, regional, and global levels, to elevate issues and drive local or collective efforts to align on market strategies and priorities. Market strategies include financing and designing market interventions (e.g., financing, procurement and sourcing, pricing frameworks, regulatory/policy approaches, product introduction plans, etc.) and course correcting as needed.

Figure 1. Healthy markets are part of an overall ecosystem required to enable access



HEALTHY MARKETS 

- Responsive to consumer preferences
- Reliable and sufficient supply
- Adequate financing
- Equitable and sustainable prices
- Quality products
- Effective introduction of new products



Market stewardship:

- Market data & analytics
- Market management capacity / influence

A broad range of stakeholders have been working to improve these market conditions. Efforts have included: introducing procurement strategies to reduce prices; bringing new quality suppliers to the market to enhance supply; supporting task-shifting to diversify products available to consumers; strengthening financial planning and policies; and facilitating the introduction of new products. These efforts have generated a significant impact, contributing to the 371 million women in LMICs now using modern methods of FP.⁶ However, communities report that these approaches have often been donor-driven, rather than grounded in collective problem-solving based on country market priorities and engaging countries to design and lead the strategy. In addition, by focusing on readily available data, approaches have been biased toward

monitoring and strengthening the public market, missing opportunities to address issues in the private sector. Analyzing and designing product-specific strategies, rather than addressing the market holistically, also carries a risk of producing unintended consequences for other products and missing opportunities to solve problems systematically.

As a result, we are calling for a new approach, grounded in building **country-responsive market stewardship capacity with a particular focus on market data and analytics and market management and coordination**. This approach aims to ensure country and global stakeholders are able to identify and address challenges across the total SRH market to generate the greatest impact with limited resources.

⁶FP2030, 2022. Measurement report: Brief. <https://www.fp2030.org/resources/2022-measurement-report-brief/>

03

SUMMARY OF MARKET CHALLENGES AND THE NEED FOR A TRANSFORMED APPROACH

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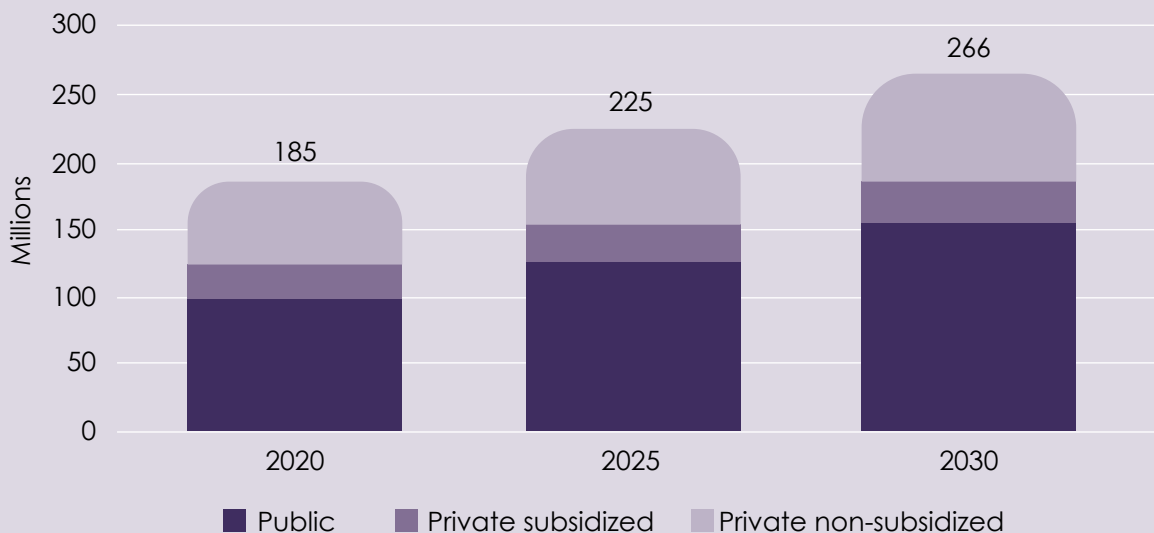
In this section, we look systematically at SRH market challenges, making the case for a transformed approach, before turning to our recommendations.

Consumer Demand: Consumer demand is growing and evolving given demographic shifts. We need more routine, cost-effective strategies to gather and share data on consumer needs or preferences to inform market decisions (e.g., research and development (R&D) product design, procurement). Consumer demand for contraceptives is expected to continue growing, with users of contraception projected to increase by 43% between 2020 and 2030 (see Figure 2 below).⁷ However, data on consumer needs and preferences is not collected or shared comprehensively or efficiently. This has led to fragmented and limited understanding of true consumer

demand, a sentiment confirmed by country market assessments and consultations. This imperfect view of demand may contribute to inefficient spending on R&D, limited uptake of new products⁸, and procurement on products that do not meet the needs of intended beneficiaries and end-users. In addition, FP2030 reports and consultations highlight the lack of insights on adolescent needs and preferences as a key challenge in addressing projected reproductive health needs of the growing youth population.

SEMA's country assessments consistently found that relying on consumption data rather than consumer insights to inform procurement decisions is a priority market challenge. This approach may perpetuate trends based more on access issues described elsewhere in this report (e.g., supply chain, financing, healthcare delivery issues) rather than responding to actual consumer preferences and needs. The same imperfect data is also aggregated and shared with buyers and suppliers to inform broader procurement and manufacturing plans, which could lead to future supply risks and/or imbalances with consumer demand. These countries called for better understanding and use of consumer data to optimize utility of planning and procurement resources.

Figure 2: Projected Growth in Users of Contraceptives (Millions) in Low and Lower Middle-Income Countries



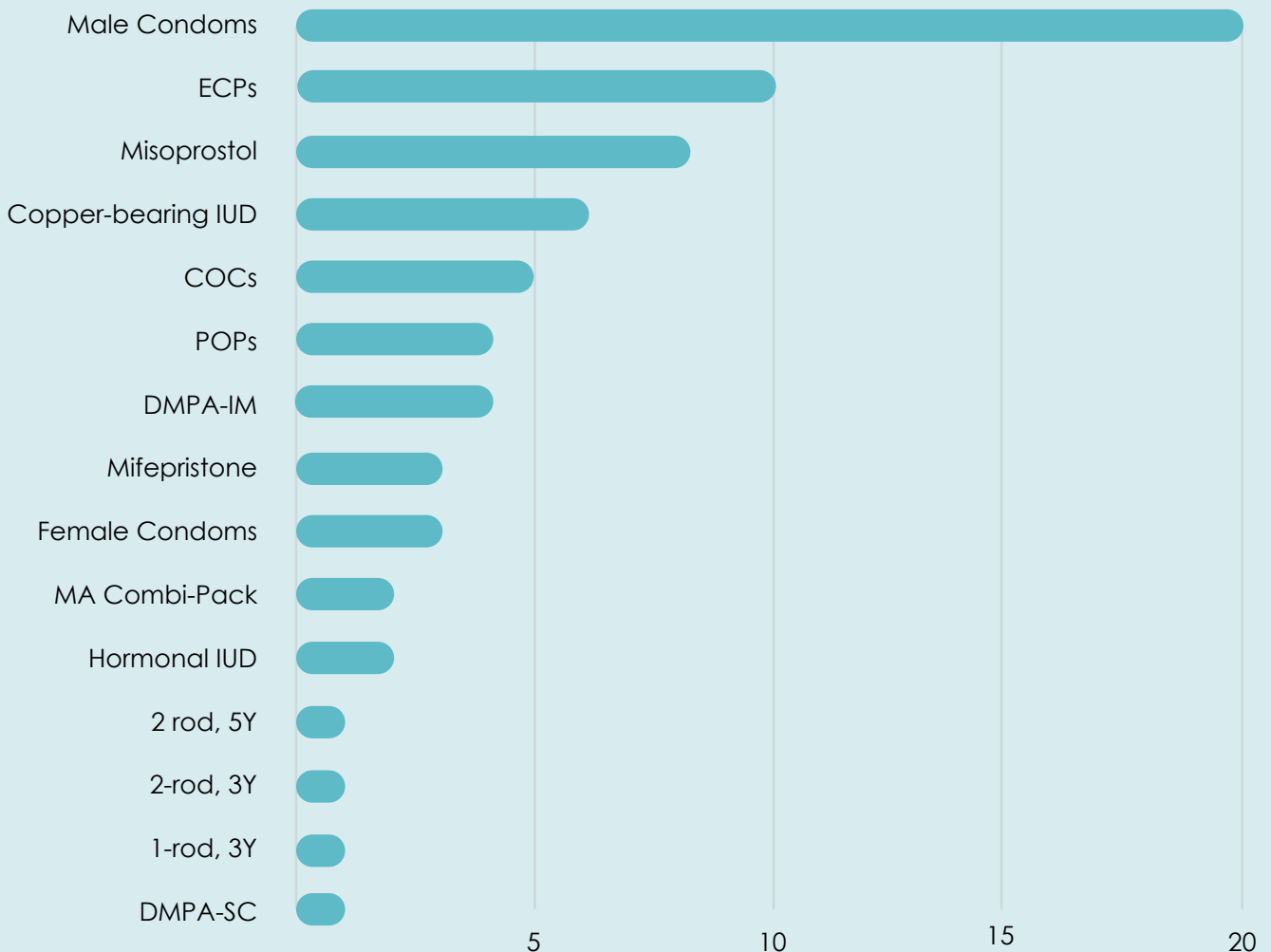
Source: LEAP: Landscape and Projection of Reproductive Health Supply Needs. Reproductive Health Supplies Coalition. 2021. (Excludes sterilization.)

⁷Weinberger M, Eva G, Gold J, Bellows N, Reidy M, Sanders R, and Skibiak J. LEAP: Landscape and Projection of Reproductive Health Supply Needs. Reproductive Health Supplies Coalition. 2021. (Low and lower-middle income country users, excluding sterilization).
⁸Boston Consulting Group and USAID. (2023). Findings from Caya market dynamics analysis.

Supply: Uncertainty around overall supply health and resiliency persists. While global institutional buyers are managing near-term supply challenges, there is no coordinated effort to monitor the supply outlook for an expanding number of buyers and drive a proactive response to moderate and longer-term risks. In the public sector, global institutional buyers (i.e., UNFPA, USAID) have made great progress on sharing data and collaborating using Reproductive Health Supplies Coalition's (RHSC) Global Family Planning Visibility and Analytics Network (VAN) to identify and manage near-term supply challenges (e.g., supply constraints or impending stock-outs) and promote product availability in the countries they serve. However,

less attention is paid to monitoring and managing moderate and longer-term risks for the full portfolio of low and low-middle income countries and products across both public and private sectors. One such risk is over-reliance on a few large suppliers for several key products. Of the fifteen product categories SEMA reviewed (including family planning and MA), over half (eight categories) have three or fewer eligible suppliers for UNFPA/USAID procurement (see Figure 3). Limited suppliers for a product generates supply risk should either a supplier exit from the market or if the international buyers procure the bulk of products manufactured by these suppliers, potentially limiting supply for smaller procurers such as national governments.

Figure 3: Number of SRA/WHO/UNFPA Prequalified Manufacturers by Product Category



Sources: World Health Organization Prequalified list, US Food and Drug Administration, European Directorate for the Quality of Medicines & HealthCare, and UNFPA

Market assessments and consultations also cite potential supply security risks given insufficient total market monitoring and management. USAID and UNFPA play a critical role as institutional buyers in ensuring affordable products at competitive prices to many countries; however, their volumes represent approximately 50% of total procurement value of family planning (FP) commodities in aggregate across the countries they support.⁹ Country public and private buyers are procuring the remaining commodities independently.



Thus, as the SEMA Injectables Market Assessment revealed, while institutional buyers conduct forecasts and engage with suppliers to secure needed volumes of supplies, for most products there is neither coordinated effort to forecast total market demand (all buyers) to compare against expected supplier production projections, nor are there forecasts that address interactions of demand across the full set of contraceptive products. Given stagnating donor funding and increasing demand, country public and private buyers' role in procuring commodities will increase but there is no mechanism to

facilitate coordination when they face price or supply risks. For instance, our country assessments and consultations highlighted that both country public and private buyers are already facing challenges in getting responses to tenders for small volumes as well as competitive prices. Moreover, country buyers provided examples of supply gaps given reliance on limited suppliers with long product lead times and distant manufacturing facilities. This gap in total market monitoring and management of the supply landscape poses significant supply security risk for the broader community looking ahead.

Financing: Funding is recognized as insufficient, and to manage the fiscal responsibilities, country stakeholders are calling for (a) support in designing sustainable and equitable public and out-of-pocket financing strategies and (b) sharing best practices in regulatory, policy and financing strategies to effectively foster private enterprises.

Financing for SRH products is currently insufficient (a \$91.8m funding gap was estimated in 2021 for 48 UNFPA Supplies Partnership countries, and only half of that was attributed to the funding shock resulting from the UK government's funding cuts).¹⁰ This gap will continue to widen significantly based on expected growth in consumer demand and stagnating donor funding. For example, Nigeria experienced a four-fold increase in its commodity funding gap between 2013 and 2019. In the 2023 fiscal year, a 70% gap remained of unfunded estimated procurement needs. If donor funding remains constant between 2023 and 2030, the projected 3% average annual increase in commodity costs would need to be covered between domestic government and private sector funding sources.¹¹

⁹Based on Avenir Health analysis of RHViz, LEAP, CS Indicators data for subset of countries that receive the majority of USAID and UNFPA support.

¹⁰https://www.rhsupplies.org/uploads/tx_rhscpublications/From_data_to_action.pdf

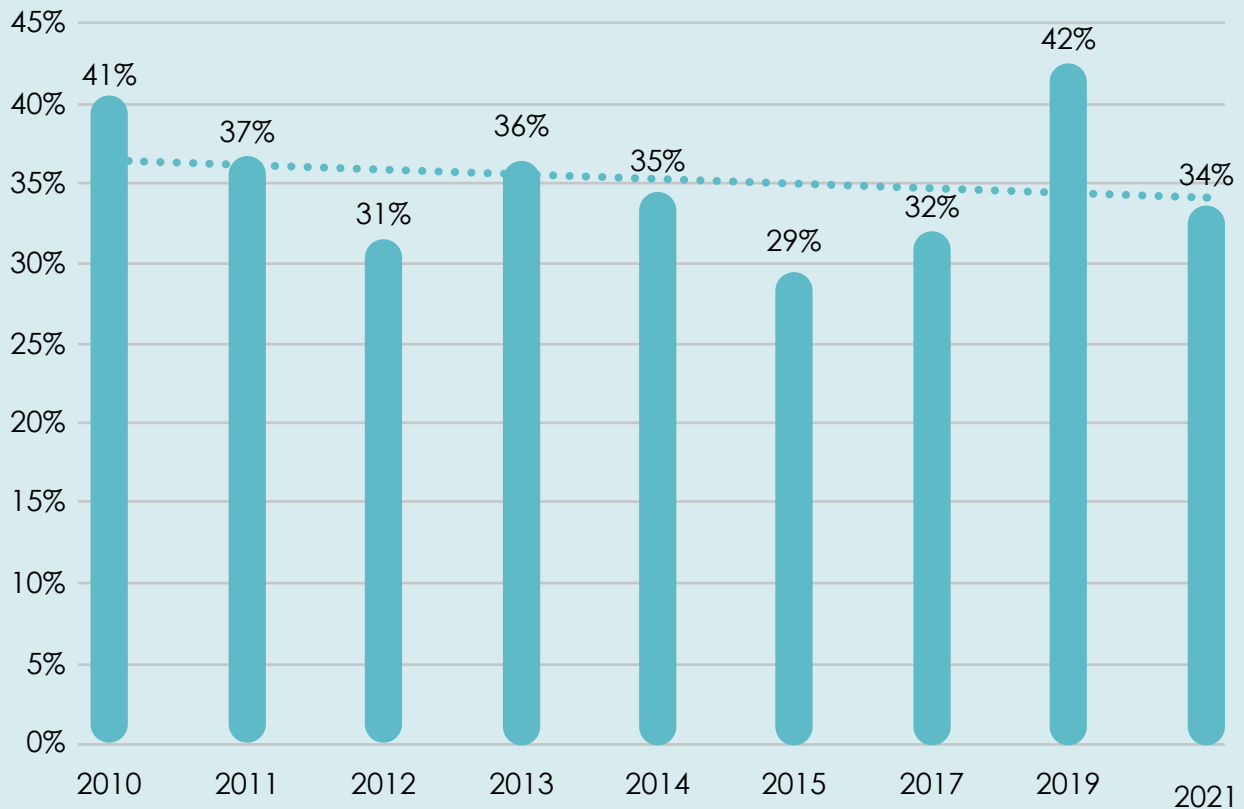
¹¹LEAP: Landscape and Projection of Reproductive Health Supply Needs. Reproductive Health Supplies Coalition. 2021. Analysis of full data download for contraceptives (Excel file).

The SRH community is pursuing innovative financing models to incentivize and support efficiencies in domestic government procurement commitments, although sometimes these commitments are delayed or fail to materialize. Progress has been variable but overall trends do not indicate steady increases in government financing for commodities (see Figure 4 below). SEMA's country assessments and consultations have revealed that to increase commodity budgets, government stakeholders are seeking support in financial analysis and planning. Specifically, they are interested in strategies that maximize the impact of limited available financing that focuses commodity subsidies on the most marginal and vulnerable. These financial planning efforts are complex and require data and analytics on private sector financing, pricing, consumer willingness to pay and actuarial studies on the ability to pay. Countries are seeking to design these more equitable and inclusive financing

strategies to secure local budgets and meet consumer demand.

Country assessments also indicate that governments are recognizing and embracing the private sector's role in meeting health needs and seeking assistance to design supportive policy and financing environment. For example, there are notable concerns that as financing shifts to domestic sources, this may result in reduced private sector availability for some products where donor-funded commodities are currently made available to private sector channels free of charge (a risk identified in a recent implant market analysis in Kenya).¹² In parallel, private enterprises are calling for improvements in pricing, regulatory, policy, financing and access to capital to expand their services and reach, to meet the growing need. For instance, SEMA's assessment of the SRH market in Burkina Faso found that capped price margins and free public sector provision

Figure 4: Average Government Funds as % of Total Contraceptive Funding



Source: USAID Global Health Supply Chain Program-Procurement and Supply Management. "Harmonized CS Indicators Dataset, 2010-2021," March 2023. Number of countries reporting each year varies, ranging from 35 to 50.

¹²Impact for Health and Jhpeigo. Kenya's Contraceptive Implants Market Analysis Report. Oct, 2023.

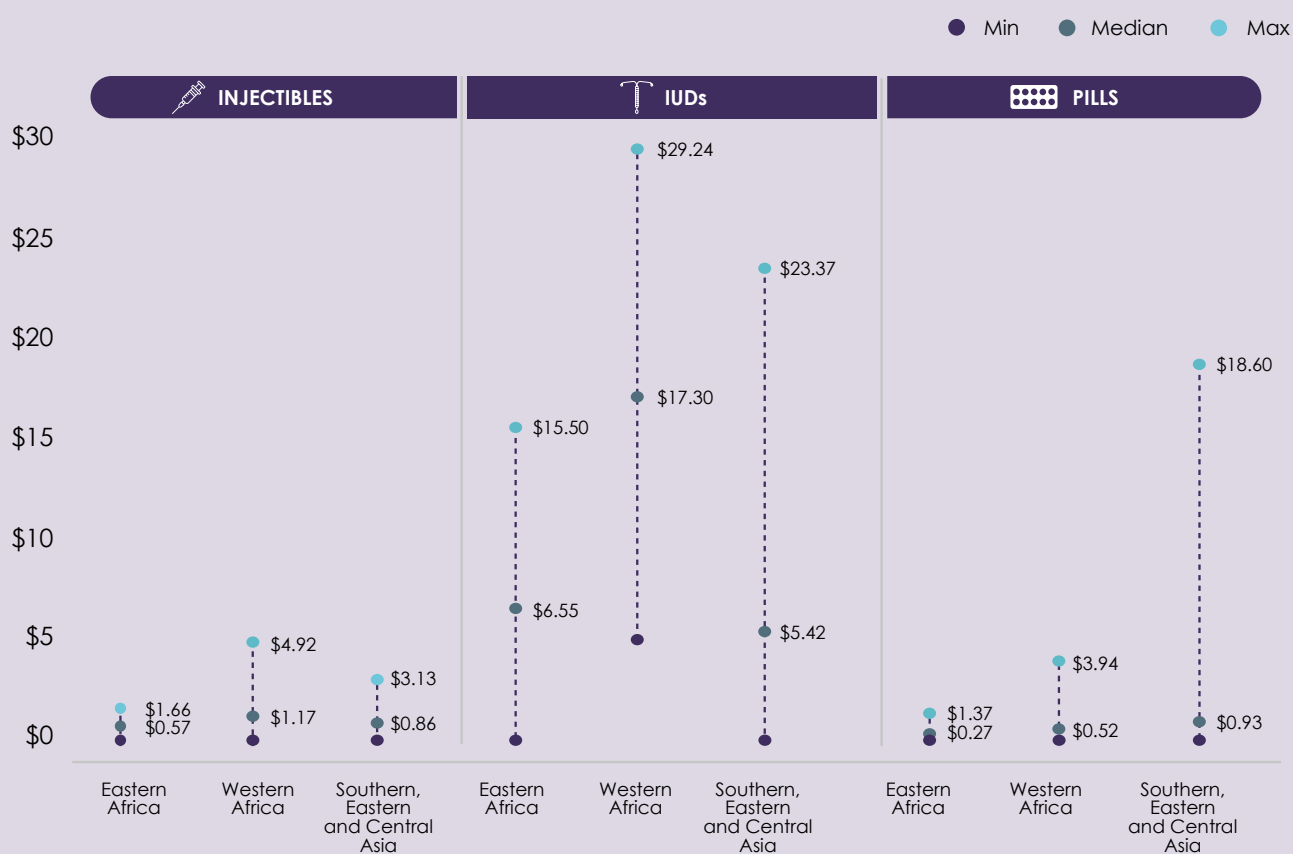
may contribute to low private sector activity, with the private sector accounting for 13% of facilities but serving only 6% of contraceptive users.¹³ SEMA's assessment of Senegal's SRH markets also found that price margin policies have de-incentivized private sector delivery of FP products.

Price: Country buyers report struggles to secure competitive procurement prices and ensure sales prices that are equitable to consumers. SEMA country assessments and consultations highlighted that country buyers and several private buyers face difficulties securing competitive prices for certain SRH products. These procurers want to minimize costs, while ensuring manufacturer sustainability; but cite a lack of routine, quality demand forecasts and

lack of visibility on cost of goods, limiting their ability to negotiate with manufacturers when purchasing smaller volumes. These limitations are expected to become more challenging as procurement shifts over time from consolidated donor procurement to fragmented government and private sector purchasing.

As noted in the financing section, country stakeholders are also seeking support on financing and pricing frameworks and procurement policies to ensure equitable pricing to end consumers and to maximize the impact of procurement funding. The limited data available shows significant variability in end-user prices within and across regions for several methods (see Figure 5 below).

Figure 5: Range of Estimated Non-Subsidized End User Unit Prices by Product and Region



Source: Weinberger M, Bellows N, Stover J. Estimating private sector out-of-pocket expenditures on FP commodities in low-and-middle-income countries. *BMJ Glob Health*. 2021 Apr;6(4):e004635.

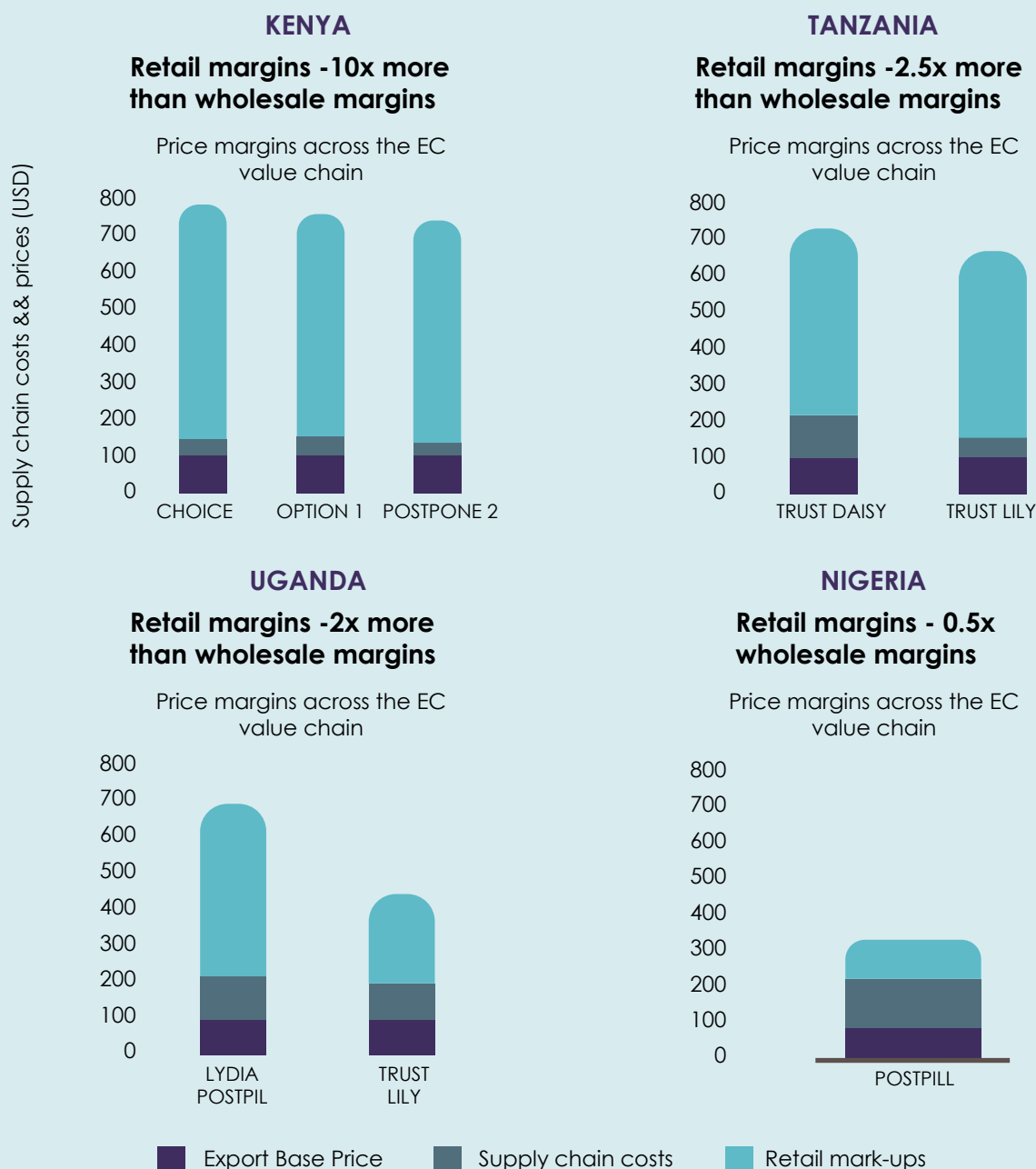
¹³Institut de Recherche en Sciences de la Santé (IRSS). 2021. Rapport sur la disponibilité des produits de santé reproductive dans les établissements de santé, 2021.

Addressing end-user pricing will also require supporting countries to understand and design regulatory and policy market interventions to optimize mark-ups along the supply chain. SEMA has invested in testing cost-effective strategies to gather and analyze trade data compared to retail point-of-sale data. This analysis provides a snapshot of import pricing versus customer

prices and margins along in-country supply chains, allowing comparisons across countries and SRH products. While this data is not representative and is currently only available in a few settings, this methodology can provide countries with a starting point for monitoring and assessing points in the value chain that warrant interventions to improve access and affordability.

Figure 6: Comparing Parts of Countries' Supply Chain that need Intervention

Margin analysis allows us to see which part of the supply chain is in need of intervention - distribution or retail



Source: Maisha Meds analysis of trade data and point of sale data, 2023

NOTE:

Price margins have been calculated as absolutes and with a base price normalized at 100 - the mark-ups are comparable across brands and countries. Total margin can be calculated by adding retail & wholesale margins
Exchange rate for Nigeria used was 1 USD = 760.27 Naira

Quality: Internationally accredited quality suppliers are limited, and country public and private buyers perceive risks to ensuring access to quality product. Countries that rely primarily upon global institutional buyers such as UNFPA and USAID can depend on quality assurance mechanisms provided through donor-led procurement policies. However, as noted above, global institutional buyers already face a limited pool of internationally quality-assured manufacturers for several product categories with limited resilience to withstand shocks in the market.

Country governments that procure products directly, often in low volumes, report challenges in securing multiple quality-assured suppliers given limited incentives for manufacturers to register with governments. Adding to this challenge, countries face resource constraints limiting registration, quality assurance, oversight, and pharmacovigilance, particularly in the private sector where quality concerns are generally more acute due to limited regulation. For example, 77% of countries surveyed reported a requirement to test contraceptives at the National Quality Control Laboratory (NQCL), but less than half of those have an NQCL that is ISO certified or WHO pre-qualified (PQ). In addition, only 32% of countries report regular field surveillance monitoring for contraceptive quality.¹⁴ Increasing reliance on government resources and the private sector will only exacerbate these challenges and further contribute to a risk of low-quality products without creative and less resource-intensive regulatory and quality information sharing efforts (e.g., regulatory reciprocity and harmonization, and finished product suppliers).

Product adoption: Country and product market assessments reveal the need for product introduction to be more country-driven and cross-product focused to improve access and resource efficiencies. R&D spending on contraceptives averaged US\$128.5M annually from 2018-2021.¹⁵ With this level of spending, it is important that promising product candidates are linked to effective know-how and processes to support introduction and uptake. Product introduction efforts to date have demonstrated success in scaling access to new and underutilized products such as implants, hormonal intrauterine device (IUD), and DMPA-SC.



However, according to country and product consultations, these efforts have often felt more donor-driven than responsive to country needs and miss opportunities for improved efficiency and impact. Countries have expressed a desire to lead decision-making and execution of product introduction efforts as seen by government-led efforts in Nigeria, Kenya, Tanzania and Zambia with support from Clinton Health Access Initiative (CHAI) and UK Foreign Commonwealth & Development Organization (FCDO). In particular, countries seek fora and standardized processes for coordinated

¹⁴USAID. 2021. Contraceptive Security Indicators, 2021. Interactive dashboard data, Aug 25, 2023.

¹⁵Policy Cures Research, 2023, G-FINDER

planning across the market with key market players, including private sector and non-governmental organization (NGO) representatives. The assessments and consultations also showed product-specific introduction efforts are often resource-intensive and uncoordinated, leading to duplication and gaps (e.g. provider training, supervision, demand generation) and limited sharing of best practices and lessons learned. Opportunities are often missed including integrating introduction efforts across products, development of standardized processes and resources, attracting private sector actors to facilitate introduction, and fostering locally-led market management and decision-making. A robust pipeline of new products, with over 40 contraceptive products in preclinical or clinical stage of development¹⁶, has potential to better meet the needs of women and girls, but will fail if resources are not efficiently deployed and coordinated for product introduction.



We believe the common theme underpinning the issues highlighted in this section are shortcomings in market stewardship capacity at the global and country levels. Key market stewardship challenges include:

01

Market Data & Analytics:

Data to monitor and analyze market trends and identify issues is insufficient, inadequately gathered and shared, and difficult to access at both country and global levels.

Key data regarding consumer needs and preferences is lacking to guide R&D, procurement, and planning. In addition, we lack even basic information regarding the private sector (e.g., consumption volumes, price) leaving us operating partially blind. Survey data is frequently used to fill gaps but is costly and time-consuming to collect and analyze and may miss important segments of the SRH market, underscoring the need for more cost-effective strategies. Even for available data (e.g. R&D pipeline, public sector supplier capacity/quality, public pricing, public sector coverage/consumption, financing, etc.), it is often incomplete, fragmented, siloed, and complicated by data sharing limitations. Selected initiatives, such as the VAN, Reproductive Health Supplies Visualizer (RH Viz), RHSC LEAP/Commodity Gap Analyses and the Family Planning Market Report, have improved the picture to an extent. Still, routine data across all sectors remains limited and fragmented. Moreover, manufacturers also lack timely data to inform their decisions on volumes to produce and how to prioritize entry to new countries that may result in supply shortages or surplus and add to the overall costs of doing business.

¹⁶Calliope Contraceptive Pipeline Database, Accessed Oct 10, 2023.

Some drivers of market data challenges relate to systemic issues (e.g., human resources) but others are driven by the ecosystem's approaches to investing in public, private, and consumer market data. Leading causes include uncoordinated investments, bespoke data collection efforts, siloed data use and exchange, and lack of data standards, making comparisons across data sets challenging or impossible and limiting the ability to generate additive insights. In addition, few individual organizations have both sustained funding and depth and breadth of data expertise to establish data standards, structures, and cleaning processes to support aggregation, visualization and analytical capabilities to continuously maintain and share market insights generated across multiple data sets. Instead, there are many organizations with smaller budgets and short-term mandates and objectives that, while yielding a variety of useful analyses, are rarely able to be compared or aggregated with other sources to extract greater value.



These same issues contribute to limiting processes for accessing and using market data, and result in underperformance in market analytics to monitor the state of the market and identify trends, risks, and opportunities. Limitations in aggregation and triangulation impact the utility of analytical tools to accurately predict market needs, which is also compromised by data gaps in the private sector and consumer preferences. And even when strategic demand forecasts are conducted for long-term planning, SEMA's product assessments highlight that these forecasts are often conducted product by product as opposed to looking at the whole portfolio and considering the interplay between products, which may risk accuracy and is also costlier overall. The field is not routinely overlaying whole of market strategic demand forecasts with predicted supply to foresee risks and mitigate appropriately, such as potential risks in Active Pharmaceutical Ingredient (API) sufficiency for intramuscular DMPA or potential risks given the interplay in supply and demand across the total injectables market.

Demand and supply monitoring is just one example of underperforming market analytics. Ideally, country and global partners would also seek improved data access and/or capacity for analyzing the R&D pipeline, the number of registered suppliers, pricing by income quartile, strategic demand forecasts to inform financial planning and budgeting, and more, in order to monitor trends and proactively identify risks and opportunities for both new and established products.

02

Market Management & Coordination:

Global stakeholder efforts are often inefficient, product-specific, and donor-driven, compromising the ability to align and act on country-identified market priorities. Market data and analytics provide warning systems; but we also need country, regional and global response systems where stakeholders leverage analytics to align on market priorities and coordinate expertise and financing.

Country market assessments highlight varying capacity and structures engaged in market stewardship activities that are inefficiently financed. National and sub-national governments often have programmatic SRH technical teams and working groups responsible for advancing SRH program and service delivery, developing forecasts to guide near-term procurement, or informing product adoption. But they often rely on limited underlying market data, analytics, and capacity to identify market risks and opportunities, such as where there are price or supply risks, new products in the pipeline, or inequities in consumer pricing. Country partners report limited capacity to design and implement market strategies either at country or regional levels such as equitable and sustainable health financing and pricing policies, new supplier sourcing strategies, etc. Further, when technical assistance is provided through a range of partners (e.g., forecasting, procurement planning, budgeting, product introduction plans), it often focuses on a specific topic without linking to other related market stewardship capacities. Technical assistance scopes often overlap in some areas across partners, and leave gaps in other critical technical needs in strengthening market stewardship. These challenges limit countries' ability to develop data-informed country market strategies to

drive action locally or elevate issues to tackle with regional or global partners.

Globally, there is no 'go-to place' to align on, coordinate, and monitor execution of efforts to tackle shared market priorities. Instead, there is a complex landscape of market-relevant partnerships focusing on specific products, themes or functions (see Diagram 1). Activities are fragmented across different product groups, each with similar membership structures and fulfilling similar functions. While product-specific initiatives have a role in providing focused attention on a new product or product-specific barrier to ensure sufficient attention and effort to address challenges, the recent proliferation jeopardizes sustained effort, efficiency and impact. In addition, these efforts are hindered by lack of country-led decision-making on prioritization of product barriers to be addressed, with governments historically uninvolved in upfront decision making and strategy setting. There is frequently limited clarity over organizational responsibility and mandate (e.g., who should work together to solve market problem X), accompanied by a sense that knowledge on market management is siloed and not always effectively leveraged. In some cases, multiple donors fund related, but different, uncoordinated initiatives (e.g., understanding mark-ups along the supply chain, new product training in countries) which can create duplication at best, competition and frustration at worst. Overall, this compromises the ability of the community to prioritize specific challenges and to deliver impact. While monitoring of markets and coordination of actions to address issues at the country level is critical to support healthy country markets, there remains an important role for collective and coordinated action to address market barriers that span geographies.

Diagram 1: Complex landscape of product-specific access partnerships

	DMPA-SC	Hormonal IUD	Implants	Medical Abortion	Cross Product
Oversight & strategy	Active	Active	Active	Active	Inactive
Funding for national product introduction	Active	Active	Inactive	Active	Inactive
Sharing learnings & best practices	Active	Active	Inactive	Inactive	Inactive
Technical assistance for introduction & scale-up	Active	Active	Inactive	Inactive	Inactive
Partner coordination & sharing	Active	Active	Active	Inactive	Inactive
Supplier engagement	Active	Active	Active	Active	Inactive
Monitoring supply & demand	Active	Active	Active	Active	Active
Demand forecasting	Active	Active	Active	Inactive	Active

*Other product specific partnership efforts with supplier engagement include Dual Protection Pill, EC as On Demand, Multi-purpose Prevention Technologies/Rings

Source: SEMA analysis of product partnership landscape

These underlying capacity issues impede the field's ability to effectively assess and intervene to improve SRH market conditions (e.g., price, supply, quality, etc.). Without purposeful action to accelerate this agenda, access goals will not be met and there is a risk the gains of the past decade may be reversed. We are therefore making **three key recommendations focused on building market stewardship capacity** that, in combination, create the necessary conditions to drive improvements in market health. This is, of course, a long-term, complex change management undertaking which will require buy-in and coordination across multiple stakeholders. However, resources are scarce, and markets are getting more complex; so, we believe that building market stewardship capacity is critical to ensure we:

- Focus on the most critical market issues to countries in support of consumer needs
- More thoughtfully monitor how interventions affect the broader market across stakeholders
- Align resources efficiently and coordinate efforts to maximize utility of limited resources, and
- Are poised and ready to identify and respond to emerging market risks and opportunities, especially if they require collective action.

Revolutionizing our approach will enable a transformation in both product and country SRH markets, adding significant value to the range of other access efforts underway in support of broader access goals.

04

RECOMMENDATIONS

Recommendation 1: Strengthen country efforts to analyze and transform country markets with increased financial and technical support

As countries assume an increasing role in financing and influencing SRH markets, there is a pressing need to target resources and technical assistance towards the goal of strengthening regional, country and sub-national market stewardship more strategically and efficiently. If successful, country stakeholders will be even stronger at managing procurement, sourcing, financing, pricing and new product adoption decision-making and processes across public and private markets. Countries will also be better positioned to identify and elevate opportunities when collective analysis and/or action may be more efficient and effective to understand or address market issues (e.g., sharing supplier quality information, coordinating volumes, supporting regional suppliers, import tax reform, addressing supplier capacity or price barriers). Stewardship strengthening activities could include the following activities:

- 1 **Market management and coordination:** To strengthen capacity to understand underlying market issues, design interventions, and support partnerships and coordination efforts (among public and private actors) to align on market strategies and drive execution within countries or with other partners.
- 2 **Market data & analytics:** To enhance access to and use of market data – especially consumer preferences and private market data – and strengthen analytics to inform market strategies (e.g., procurement, product introduction), design interventions (e.g., regulatory reform, procurement intervention, pricing strategy), and monitor progress.
- 3 **Quality supply (including procurement strategies and tools):** To support countries and regional procurement partners to leverage effective strategies to ensure supply security, quality and cost savings.
- 4 **Financing and pricing:** To support countries to analyze their financial requirements and design strategies to manage their financing gap, including leveraging global financing instruments, public/private coordination, pricing strategies, and other approaches.
- 5 **Product adoption and demand (including private sector integration):** To support planning, strengthening of local structures and processes, decision-making criteria, training, consumer awareness, and other key bottlenecks for facilitating rational and timely product introduction and integration into public and private channels. The support may focus on individual products or leverage cross-product approaches when appropriate.

Box 1 shares specific market opportunities prioritized by stakeholders through SEMA's country assessments demonstrating demand for these kinds of support.

Box 1 Country and sub-national market priorities

Country market assessments conducted by SEMA in Nigeria, Senegal and Burkina Faso identified several country priorities that could be addressed through market stewardship strengthening such as:

- Launch of a national SRH markets technical working group to improve coordination among actors in the public, NGO, and private sectors.
- Development of a national private sector engagement strategy outlining pathways for utilizing and supporting equitable access to quality SRH products and services through the private sector.
- Incorporation of consumer preference data into quantification processes to ensure this is reflected in procurement and financing decisions.
- Technical assistance to streamline procurement and registration processes, which currently deter manufacturers.
- Development of a national strategy to mobilize domestic and donor resources and develop health financing strategies that maximize support for the most vulnerable.

This list is non-exhaustive. There are also various prioritized country market opportunities related to financing and procurement that are common across multiple countries and which would be better addressed via cross-cutting, multi-product functions, driven by improved over-arching market coordination and management mechanisms as described in subsequent recommendations.

Although multiple donors and programs support some of these objectives in different ways in varying countries, there are also many challenges. The scope may be driven by donor, rather than country priorities; and overall support is inadequate and not always aligned and coordinated with other donor efforts. Therefore, we urge donors to **pool existing, fragmented funding and technical support together into one multi-country and cross-product market services fund**. Countries would apply for support based on priorities identified through national strategic processes to ensure alignment and coordination with their priorities. A pooled funding mechanism that responds to country driven needs with context-specific support would also allow donors to (i) have broader impact, (ii) align with country priorities and provide sustainable support efficiently coordinated with other resources, (iii) work with a variety of players to support localization and amplify the local vision, and (iv) enable cross-fertilization between countries. The Catalytic Opportunity Fund, currently funded by four donors, represents valuable proof of concept and lessons learned from the effectiveness of such an approach that could be expanded on to have a broader cross-product market focus.



Recommendation 2: Transform access to more comprehensive market data and analytics

Transformation is essential to increase the availability of market data and to monitor the total market for risks, challenges, and opportunities to drive action.

In the long-term, the field should establish **a cross-product, cross-sector market data platform** to promote better decision making and healthier markets. This platform would work across partners to bring disparate data sets together, related to SRH markets such as consumers (preferences, consumption), products (R&D pipeline, API and finished product supplier landscape/capacity, pricing, quality status, range of cost of goods), financing (financial allocations), pricing (procurement ranges, end price to consumer range), product introduction readiness/scale (countries registered, % of providers trained) and more. The data will enable market analytics to create new and consolidated insights (e.g., consumer trends, long-term strategic demand forecasts, supply or quality risks, price inequities, financial gaps) and monitor the state of the market.

Development of such a platform will not be easy and requires alignment on standard data formats, quality standards, and data sharing agreements to facilitate data integration. Ultimately, the multi-user platform should provide appropriate access to market data to countries, manufacturers, donors, implementers, procurers and distributors (ensuring appropriate guard rails of access based on type of user to protect sensitive data) to promote better decision-making and healthier markets. We believe it is feasible, even in the short term, to better coordinate and facilitate integration of existing market data. An illustrative cross-product dashboard that integrates publicly available market data across multiple sources is included in the Appendix 1 as an example of what is feasible as a starting point. In addition, an initial country-specific

dashboard country-specific dashboard might include information such as product procurement volumes (public vs private sector as available), number of registered suppliers, product procurement price, and end to consumer prices (public vs private as available). Organizing and sharing such data would save human and financial resources by reducing duplicative efforts (with sometimes conflicting information), improve transparency for stakeholders, promote more data sharing, and support planning and coordination.



To maximize the impact of this platform, we also recommend complementary investments to support market monitoring and analytics to create new market insights. Monitoring efforts could track areas such as number of suppliers and estimated manufacturing capacity, procurement pricing trends, end user price trends across income groups, quality risks, and more. Illustrative analytics would include multi-product strategic demand forecasts, comparing projected demand to supply capacity, and developing financial requirement scenarios. As noted previously, currently there is no go-to for such efforts or they are bespoke (e.g., single product vs. comprehensive demand forecasting). This data and analytics would allow actors across the SRH market ecosystem to better understand markets, proactively identify risks, align around strategies, and adjust approaches.

In parallel, we need to fill critical data gaps that impede the field's ability to understand markets and guide decisions.

First, we need to identify and expand on innovative data sources and cost-effective approaches to generate data on procurement, consumption, and end-user price in the private market. Box 2 provides an example of an innovative approach that SEMA has conducted with Maisha Meds and other partners to cost-effectively and routinely provide data to monitor consumption in the private sector. This effort leverages import/export data that can be triangulated with other more restricted and expensive data sources (e.g., commercial market data providers) if desired. Box 2 also provides an example of point-of-sale data that has been proven to be a cost-effective approach for routine data at the retail level that could be replicated and scaled.

The other critical data gap is consumer data, research and insights, as a key to mediating access to consumers. A first step would be to review consumer data projects funded by various players to assess what exists, what is comparable, where the gaps are and to identify cost-effective strategies to fill the gap (e.g., monitoring consumer sentiments, leveraging multi-country digital surveys). The next step would be to align on and collectively finance a research agenda informed by country priorities, ideally expanding to include provider research data over time.



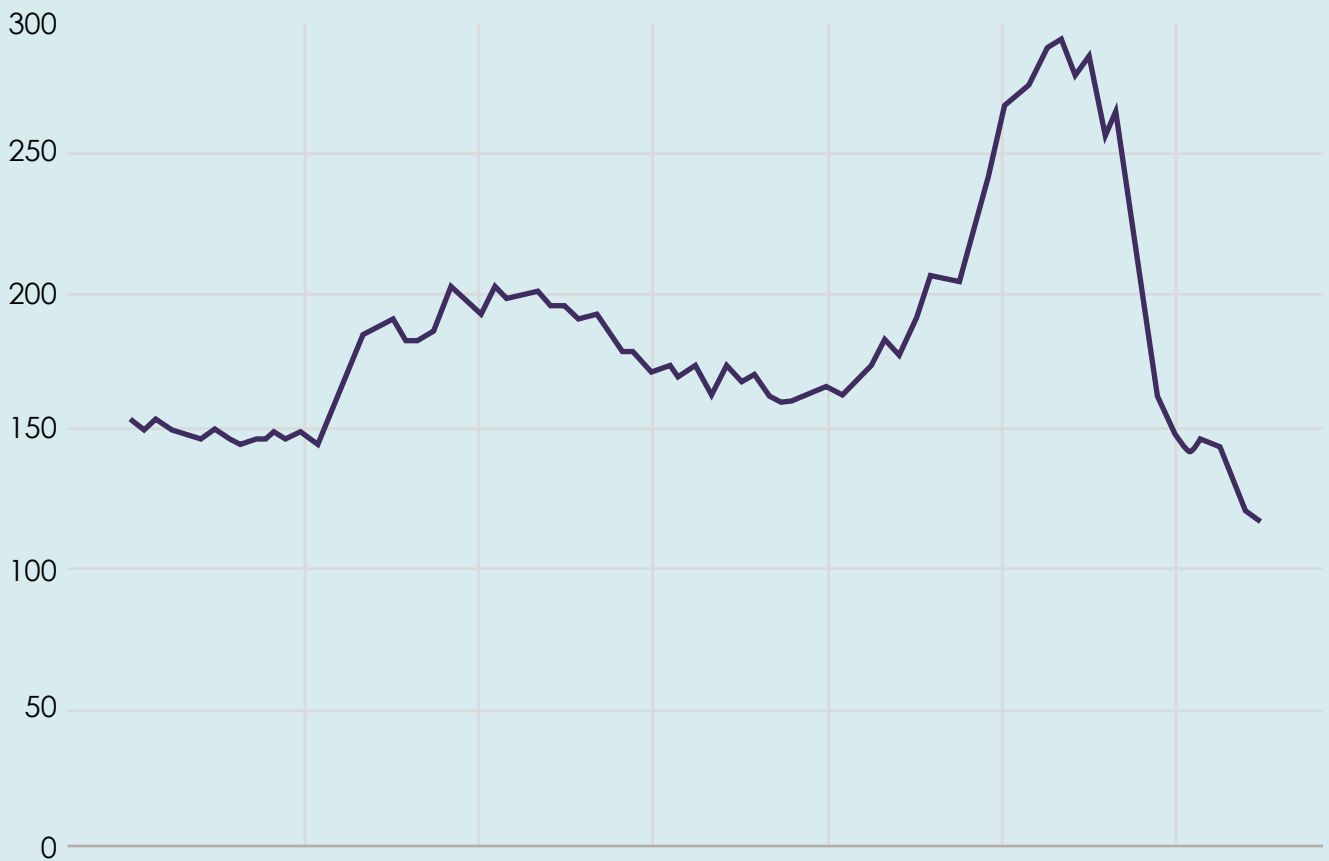
Box 2 **Examples of Potential Opportunities** **for Improved Market Data**

Data on products flowing via the private sector and other leading indicators to identify market risks have been a persistent gap in understanding the current state of the market and limited opportunities to strengthen product access. Working with Maisha Meds, SEMA has explored novel sources of data to complement what we know about the public sector. Using product naming standards developed by the VAN, we supported aggregation and analysis of trade (export and import) data from several key pharmaceutical manufacturing countries in Asia to build out an automated process to view a routine, updatable data source that can monitor the movement (quantities, value, source, destination) of both API and finished pharmaceutical products.

Monitoring of prices and volumes of key starting materials (KSM) and API (as shown in the example in Figure 7) can serve as a leading indicator to identify risks related to manufacturing sustainability (if prices are falling too low) or identify risk of future price increases of finished products, or lower margins for manufacturers as input prices rise. For example, data showing a rapid rise in price per kilogram (KG) combined with a decrease in shipment volumes in KGs is indicative of a global API shortage. This type of data could be used to spot upstream shortages 3-6 months ahead of possible product shortages or price increases. This analysis can be used to inform potential market interventions to mitigate risks. Data on volume of products shipped to countries by sector (as shown in the example in Figure 8) can fill key gaps in data related to private sector share of the overall market, price variations for government, private sector and donor procurers, and can inform analysis of trends in consumer demand. These analyses could inform government procurement decisions in addition to policy decisions such as quality assurance requirements (if a large share of imports comes from non-quality assured [QA] manufacturers and private sector pricing policies.

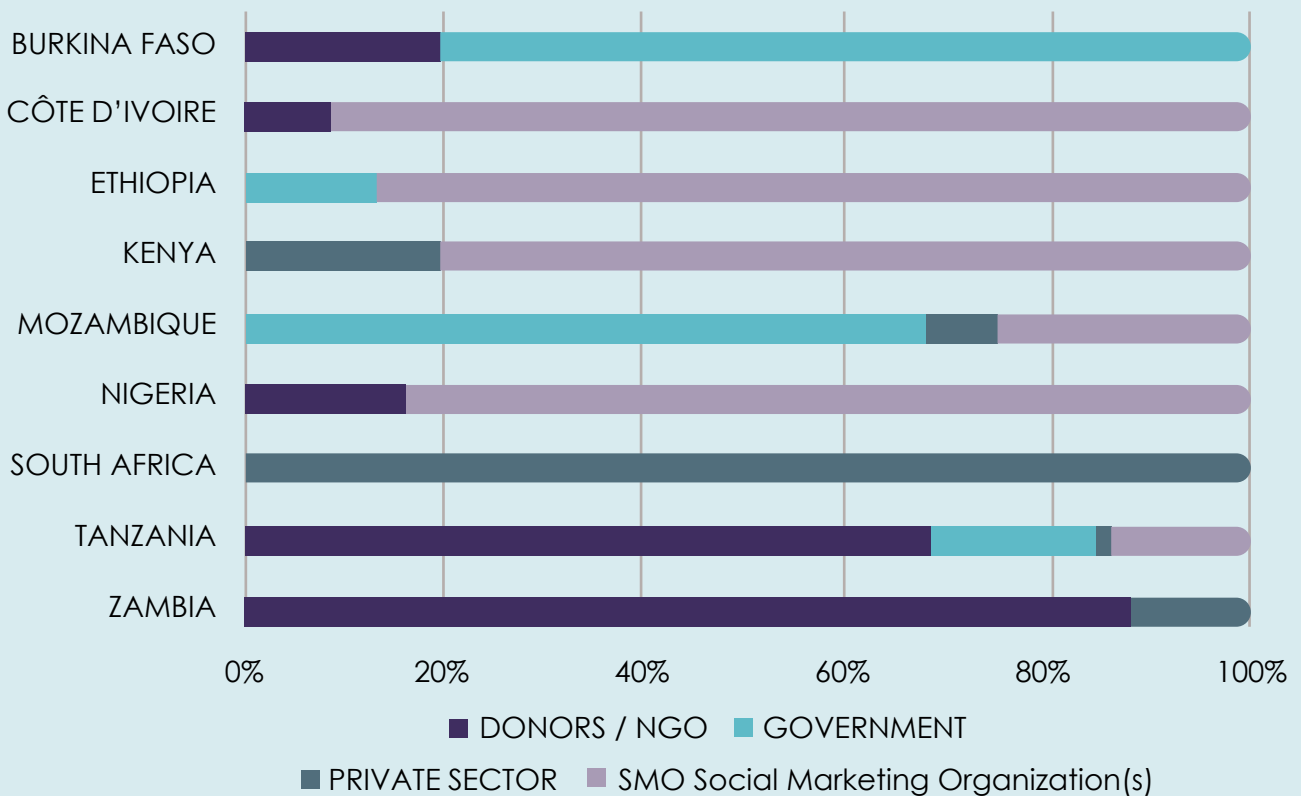
Box 2 Cont.

Figure 7: Illustrative Example of Average Price per KG (\$) of API / KSM for Upstream Manufacturing



Source: Maisha Meds analysis of trade data, 2023

Figure 8: Illustrative Example of Total Volume of an SRH Product Shipped to Sub-Saharan Africa by Sector at Destination



Source: Maisha Meds analysis of trade data, 2023

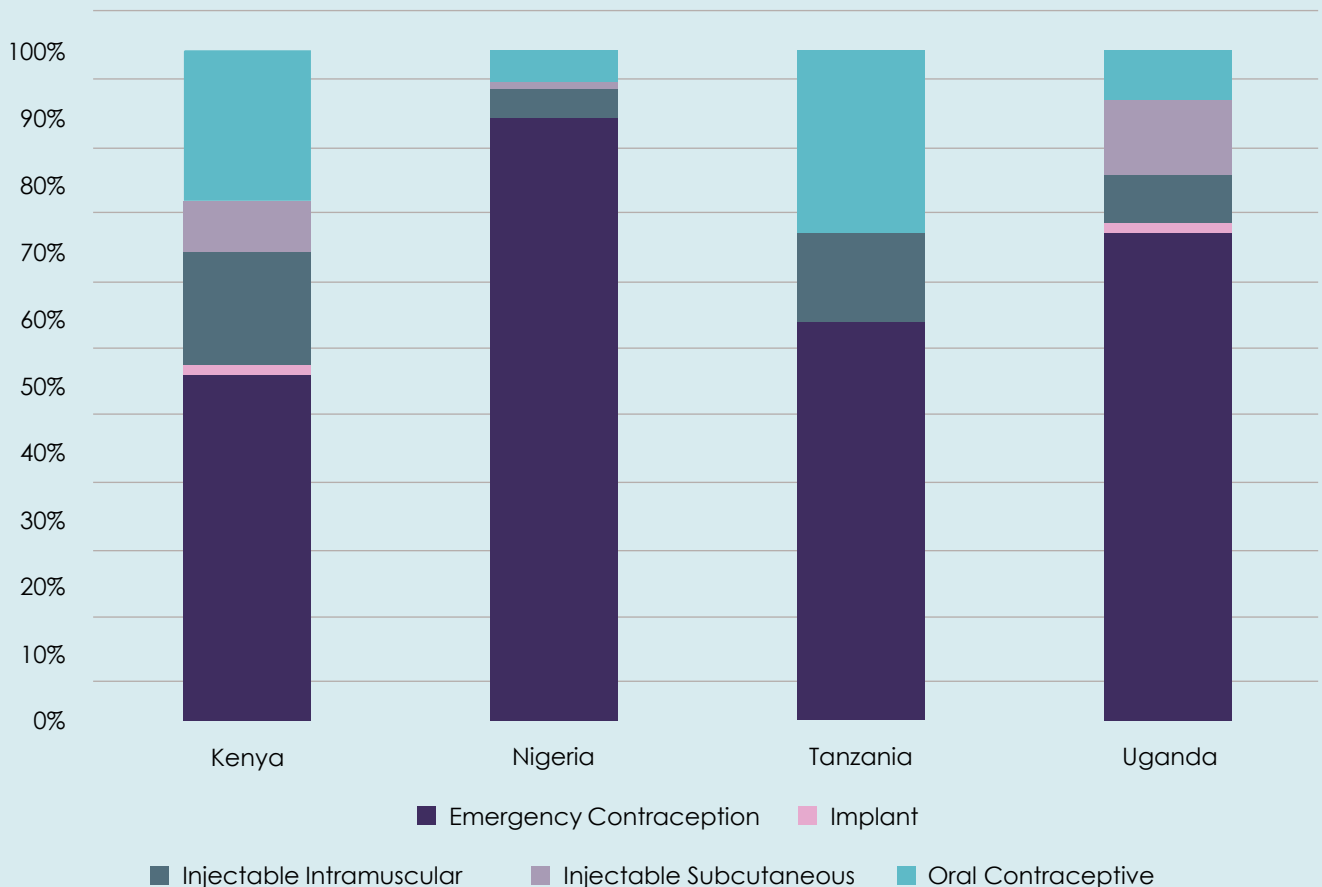
Box 2 Cont.

Additionally, advances in technology such as inventory management software systems at retail points also present new opportunities to gather point of sale data. Point of sale data provides a real-time, reliable source of trend data regarding which products are being purchased where, in which quantities, and at what prices in the private sector to monitor equitable pricing and access. When combined with data from higher levels of the supply chain, point of sale data allows assessment of the mark-ups being charged to end users to consider tax and policy reform. SEMA partnered with Maisha Meds to test the value, cost, and feasibility of leveraging its inventory management software system to gather point of sale data in four countries. Examples of this data are provided in Figure 9. This initial study demonstrated that this strategy is more cost-effective than expensive, one-off, non-repeatable surveys, which are the basis of much of our current private sector market intelligence. While current point of sale coverage is too small

to provide a nationally representative sample, it provides a starting point of understanding end use trends for the facilities and geographies covered. As the network expands, data ideally would be weighted by region and facility types to try to account for possible bias in the sample towards particular channels and subnational regions. A next step would be to work with multiple providers to expand coverage of this approach, standardize data to ease aggregation, and explore how to share costs with other health areas interested in the data (e.g., malaria, TB).

While some of these novel data sources are still nascent and need further exploration and expansion, we see the value both on their own and in combination with similar data on product movement from the public sector, to promote data triangulation, comparisons across sectors, and ultimately a much-improved understanding of the market overall.

Figure 9: Maisha Meds Point of Sale Data for Four Countries



Recommendation 3: Establish mechanisms to build consensus and drive coordinated action on market priorities

There are many common market shortcomings across country and product markets that would be better addressed in a collective, cross-cutting and coordinated manner. There is currently no mechanism to collectively define and agree on those priorities among stakeholders and across the whole market, and certainly not one that starts with countries defining and prioritizing their needs.

SEMA envisions a future state with a mechanism for cross-cutting market coordination and management. **This mechanism would include a multi-stakeholder leadership group, including country representatives, procurers, donors, and other stakeholders.** The group would align on market priorities based on evidence from the market data and analytics, led by country stakeholder needs. Example market issues could include a product-specific long-term or systemic supply challenge or risk; aligning and coordinating around new product R&D and introduction needs; or cross-product opportunities such as financing mechanisms or local/regional manufacturing (see Box 3 for examples of additional opportunities that could be prioritized for coordinated action).



In this future state, product-specific access initiatives would continue but would be time-bound and focus on addressing specific product market barriers prioritized by the community and then integrated in broader market monitoring efforts. The product specific access groups would have clear linkages to overarching market management and coordination functions to ensure integration and alignment with cross-product efforts and priorities, and to avoid duplication of efforts. Product access groups would also leverage cross-product market data and analytics to monitor for risks and trends to optimize resource efficiencies.

The development of a market coordination and management mechanism will require significant change management, facilitation, and ongoing coordination support. However, the benefits of this approach include increased level of consensus and coordination around priorities; enhanced transparency on decisions and accountability around action; creating a sustainable platform for multi-sector and cross-geography collaboration; and improved overall efficiency and coherence of resources.



Box 3

Examples of Potential Opportunities for Prioritization and Coordinated Action

Looking across the product and country market assessments conducted over the past year, we have identified several opportunities for coordinated action. A mechanism is needed to determine the relative prioritization of these opportunities, considering the SRH market as a whole, and to align partners and funding around consensus priorities.

Cross-product opportunities:

Financing and Supply Platform: A multi-country, SRH-specialized platform for procurement and financing could create a virtuous cycle of greater volumes, better quality, more consistent pricing and improved customer service, as well as unlock additional financing for SRH products from both public and private buyers within countries. This could include pre-financing for procurers, holding inventory closer to markets and more sophisticated approaches to demand forecasting.

Quality Assurance Platform:

A mechanism for sharing data and insights on product quality issues and concerns identified across countries could facilitate increased transparency and awareness and expand countries' capacity to monitor the quality of registered products in the public and private sectors. This data could also be useful in facilitating coordinated and expedited registration processes for new products.

Product-specific opportunities:

Hormonal IUD: Support public sector Hormonal IUD introduction and consumer insights and maintain diversified supply at adequate levels of scale and affordability.

Injectables:

Support DMPA-SC (subcutaneous) scale-up including through private sector and efforts to diversify and expand supply through engagement with generic manufacturers; ensure sustainable supply and appropriate supply diversification for DMPA-IM (intramuscular) as the overall injectables market evolves over time.

Medical Abortion:

Support country-level advocacy and scale-up activities to address restrictive environments and continue efforts to increase availability of affordable quality MA products.

Emergency Contraceptives:

Support efforts to reduce end-user pricing through private sector channels that is currently up to 7x higher than institutional procurement prices; enhance data collection to better understand consumer needs and preferences as it relates to emergency contraception.



05

CONCLUSION

In conclusion, our collective work in transforming the SRH market is critical for achieving sustained product access for communities in LMICs.

And given rapid shifts in economics, politics, demographics, and the role of the private sector, we need a more efficient, future-fit approach. These nations are prioritizing requests for increased market stewardship in terms of resources and strengthened expertise to manage key areas like procurement, financing, pricing strategies, and product integration. In addition, there is an unmistakable need for improved data and analytics regarding the SRH market which serves as the bedrock for making informed decisions and managing market changes adeptly. Establishing a shared data platform would enable stakeholders to efficiently access the insights needed to shape effective policies, anticipate potential disruptions, and allocate resources more strategically. The complexity of the issues, limited resources, and shared market risks and opportunities demands that we also create a mechanism to facilitate multi-stakeholder coordination and collective action, when necessary, to address future opportunities and risks head-on.

We thereby invite every stakeholder involved to wholeheartedly pursue these recommendations, aimed at advancing the health, resiliency and sustainability of the SRH market. Implementing these measures will not only help address the expanding and varied needs of global populations but will also help empower women and girls to take ownership of their health and futures. It is through our joint commitment and action that we can create more equitable and reliable SRH markets and support communities worldwide.



APPENDICES

Appendix 1. Cross-product market monitoring dashboard sample

To test the feasibility and utility of a market data platform as envisioned under Recommendation 2, SEMA began to prototype a cross-market monitoring dashboard for FP products. The following table provides a sample dashboard showing publicly available data by product across a range of public sources of market data. The table highlights outliers in yellow based

on indicators when comparing across products. Future iterations would show additional products, expanding to include safe abortion and maternal health as possible. Additional views would include more granular and restricted data to authorized viewers to build out a more comprehensive understanding of market health and risks.



Table 1: Sample Cross-Product Market Monitoring Dashboard

This table provides a sample cross-product monitoring dashboard showing publicly available data by product across a range of public sources of market data. The table highlights outliers in

yellow based on indicators when comparing across products. Other iterations would show additional, more granular and restricted data to authorized viewers.

Indicator	Data Source	Injectables		IUDs		Implants			Oral Contraceptives			Condoms			
		DMPA-SC	DMPA-IM	Hormonal	Copper-bearing	1-rod, 3Y	2-rod, 3Y	2 rod, 5Y	ECPs/PI an A	COCs	POPs	Male Condoms	Female Condoms		
Consumer Demand (Only proxy data available)	Share of contraceptive method mix (reversible/ short-term methods only)	LEAP - 2022 Estimates		19.5%		16.9%		14.0%			0.3%	27.4%	21.9%		
	Procurement growth - donor funded (5-yr average annual growth rate 2018-2022)	RHViz (donor financed, not all public sector)		11.4%	27.0%	-14.1%	9.4%			28.7%	6.3%	11.5%	1.2%	-10.8%	
	Sales growth - SMOs (5-yr average annual growth rate 2018-2022)	Contraceptive Social Marketing Stats (SMOs only)		5.1%	-10.3%		9.4%			17.8%	3.4%	-5.1%	95.3%		
	Projected annual growth rate in users (2019-2030)	LEAP (by method) - Compound Annual Growth Rate (CAGR) 2019-2030		2.2%	1.5%		11.2%			11.2%	1.6%	2.6%			
Supply	Shipments - 2022	RHViz		73.8M	91K	1.6M	13.1M			2.8M	63.2M	17.6M	1.4B	14.0M	
	Average % facilities stocked out	FP2030 (average across countries)		23%	27%		28%			46%	24%	27%	46%		
Financing	Projected annual growth rate in costs (2019-2030)	LEAP (by method) - CAGR 2019-2030		2.3%	1.1%		9.7%			10.6%	1.9%	2.7%			
Price	UNFPA Average Unit Cost per Couple years of protection (CYP) (2022)	\$3.40	\$2.68	\$2.26	\$0.09	\$3.66	\$2.67	\$2.24	\$4.64	\$3.48	\$4.75	\$3.27	\$59.18		
	Private sector (non-subsidized) price per CYP, avg (retail) (2022)	LEAP (Calculated as Cost/Quantities/ CYP conversion factor)		\$4.57	\$1.85		\$6.53			\$12.57	\$16.53		\$3.66		
Quality	# QA suppliers*	WHO PQ list; US FDA, EDQM		1	4	2	6*	1	1	1	10+	5	4	20*	3
	% of countries with no SRA or WHO-PQ products registered	Contraceptive Security Indicators (2021)		8%	17%		7%			20%	7%	15%	18%	36%	
Product adoption	# of countries with product orders in 2022	RHViz - Single year quantity table (2022)		92	10	62	81			47	71	52			
	# of new products in active development (pre-clinical and clinical stage; for female users)**	Calliope Contraceptive Pipeline Database (accessed Oct 10, 2023)		8	7		6			7			None		

*# of manufacturers, not # of products, since each manufacturer may have multiple products
 ** Additional 4 transdermal, 3 vaginal gel, 6 vaginal ring, 1 microneedle patch in development
Notes: Market encompasses low and lower middle income countries, unless noted otherwise

* with UNFPA prequalification (devices)

*UNFPA Pre-qualified manufacturing sites

The long-term vision described in Recommendation 2 would include expanding upon this to more easily integrate varying data sources and view routine indicators that can signal areas for potential intervention. A future version would ideally include data for MA, and eventually other Maternal neonatal and child health (MNCH) products. Varying views of this dashboard could be made available to different audiences, depending on use case and data sharing restrictions. Due to sensitivities and concern around competition, some market data cannot be published in a public-facing dashboard, but

there are many indicators that can be shared in aggregate. A view with additional sensitive market data would be ideal for sharing with a small group of stakeholders (e.g., a market management and coordination leadership committee with appropriate data sharing agreements in place), to inform decision-making on market interventions.

Additional indicators that would be useful to include in an ideal future state product dashboard with access to more complete market data are summarized in the table below.

Additional Potential Indicators

Consumer Demand	Consumer insights - new insights published in prior 12 months (Y/N)
Supply	Shipments split by product within category Ratio of estimated supplier capacity to projected procurement demand (5 year average)
Financing	% of annual need funded (public sector) % total procurement by public sector % total procurement by private sector Avg ratio govt to donor funding for procurement
Price	Public sector price avg (procurement from govt) Private sector price avg (procurement)
Quality	% total market from QA manufacturers (est.) # QA API suppliers
Product Adoption	# of new countries with product orders this year

Appendix 2: Additional market data and analysis opportunities

Additional analyses demonstrate the potential value of combining various market data sources to inform market insights. These analyses are currently hindered by lack of standardization in data and challenges with lack of clarity and risk of double counting. For example, below an attempt was made to compare couple years of protection (CYPs) delivered by product comparing RHViz data (primarily but not exclusively USAID and UNFPA shipment data) and SMO sales data from the Contraceptive Social Marketing Statistics (CSM) Report for the years 2018-2022. While

comparisons of shipment data and sales data are imperfect and these data sources may reflect duplication, such that we would caution strongly against comparing the totals, the trends in the relative importance of products by sector are informative. Effort to expand to SRH products beyond contraceptives as well as to standardize reporting definitions and product naming and output formats could make future comparisons of these data sets (and others) much more accessible and useful to easily understand and identify trends.

Figure 10: CYPs - 5 Year Trends from RHViz (USAID and UNFPA shipments) and CSM Report (SMO reported sales)



Sources: RHViz (Accessed Sept 2023) and Contraceptive Social Market Statistics Report (CSMR)(June 2023)

Progress has been made in better assessing the financial landscape for contraceptives but a variety of data sources still need to be combined to assess the outlook, where these combinations may only be valid for a subset of overlapping countries. Additionally, these data sources tend to be robust for

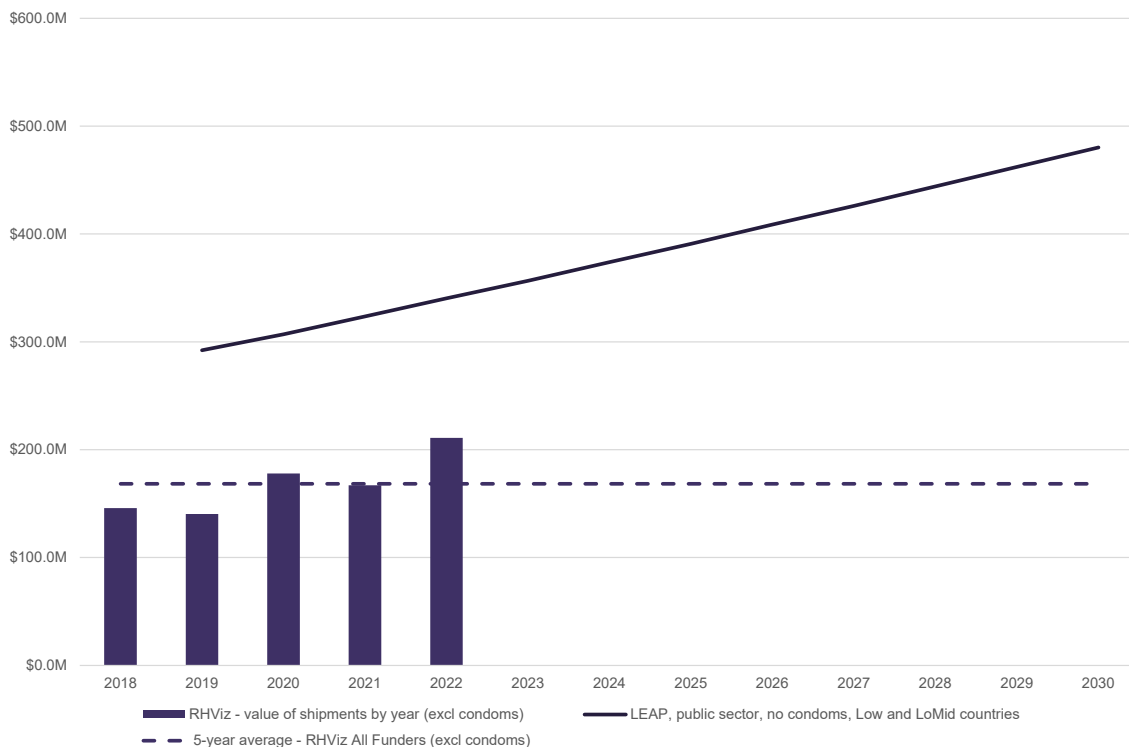
contraceptives and less so for other SRH products. Recent work by Avenir in the Compass Financing Index¹⁷ to combine several useful data sets around contraceptive product financing help show how this can be done, and illustrate the different views across data sets.

¹⁷ RHSC, Avenir, Interactive Online Data Annex to the Contraceptive Commodity Funding During the COVID-19 Pandemic Report - <https://compass-finance.rhsupplies.org/>

An example of combining data below shows the 5-year totals of historical donor funding for FP product shipments (RH Viz) and five year average overlaid with the expected public sector needs for contraceptives from the RHSC LEAP analysis. While again, projected need for products and historical financed shipments, is

an imperfect comparison, it allows us to show, in broad strokes, that if donor funding truly is stagnating as public sector needs grow, the need to identify alternative sources of financing is imperative as well as promoting healthier markets, quality services, and more equitable pricing in the private sector.

Figure 11: Historical Donor Funding (Based On Shipment Data) Compared To LEAP Projections For Public Sector Product Costs (Excluding Condoms)

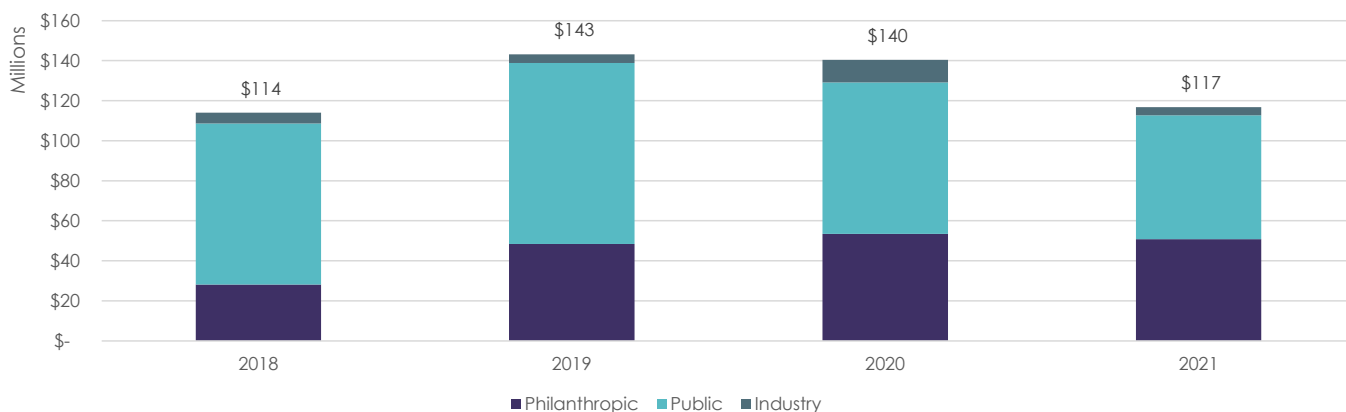


Source: Reproductive Health Supplies Visualizer (RH Viz) (Accessed September 2023) and LEAP Full Data Download

Another area that is ripe for inclusion in market analysis and monitoring is the R&D pipeline and spending. This would enable tracking where efforts are likely to yield potential market entrants to start exploring realistic commercialization opportunities as well as tracking where and how spending is going and ensuring appropriate links to consumer research, both for new and existing products. The Contraceptive Technology Innovation

(CTI) Exchange Calliope Database provides an important resource on pipeline products and the Policy Cures Research G-FINDER project tracks R&D spending across industry, public sources, and donors for priority global health challenges, including SRH and contraceptives as a subset of SRH. An example of annual funding trends for contraceptive R&D by funder type is shown in Figure 12 below.

Figure 12: R&D Spending on Contraception by Funder Type (2018-2021)



Source: Policy Cures Research, G-FINDER Project, accessed September 2023

Appendix 3. SEMA market assessment approach and reports

SEMA developed a Healthy Markets Framework (HMF) for assessing the health of national and product markets using qualitative and quantitative indicators. The HMF seeks to reflect all major dimensions of market foundations (e.g., market data, market analytics, market management, market institutions) and market conditions (e.g., financing, supply, consumer demand, price, quality, product adoption).

SEMA and its partners used the HMF to conduct SRH national market assessments in Burkina Faso, Nigeria (5 states and Federal level), and Senegal and product market assessments for contraceptive injectables, the hormonal IUD, and MA products. Each assessment scores the market foundations and market conditions along the spectrum of 'unhealthy' to 'very healthy'. SEMA and its partners facilitated a collaborative and consensus-driven process to review the data, arrive at the assessment scoring, and develop

recommendations to address the market issues. This then resulted in a set of prioritized recommendations for each assessment.

The findings and recommendations from each directly informed the development of the summary and recommendations in this report for future market transformation. While the national market and product assessments were conducted independently, some findings and recommendations from both require country-level and global-level engagement and action that would ideally be advanced in a coordinated manner to ensure a systematic, sustainable and country-led approach.

The market assessments and recommendations summary report are available on the SEMA website at www.semareprohealth.org on the Resources page.

National Market Assessments:

SEMA Burkina Faso Assessment and Recommendations Summary

SEMA Nigeria Assessment and Recommendations Summary

SEMA Senegal Assessment and Recommendations Summary

Product Market Assessments:

SEMA Hormonal IUD Assessment and Recommendations Summary

SEMA Injectables Market Assessment and Recommendations Summary

SEMA Medical Abortion Market Assessment and Recommendations Summary

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