





The evolution of RH supply markets: a case for country leadership, global support, and accurate data for effective market management

Cammie Lee, Biruk Tesfaye, Cristina Puig 19 October 2023 | 15:00 - 15:45 | Palm Jumeirah



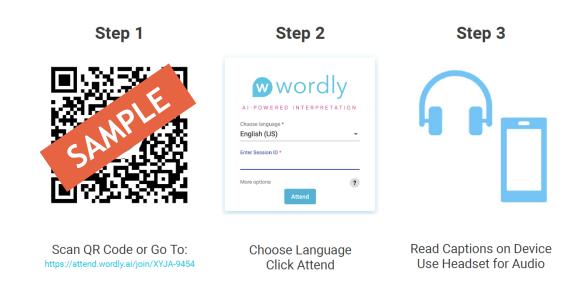
R 2023 ACCRA, GHANA #ITSABOUTSUPPL

Available AI Translation

Available via QR code and URL on table (audio option available via headphones)

Example SessionHow to Use Live Translation

Adjusting Session Speaker Language



We appreciate your patience and understanding as the AI and our glossary continue to learn and make improvements.

MEET TODAY'S PANELISTS



SARAH WEBB Senior Technical Officer, RHSC



CAMMIE LEE
Senior Program Officer,
Maternal Newborn & Child
Health, BMGF

presenting on behalf of R4D



BIRUK HAILU TESFAYE

Maternal & Child Health

Expert, Ministry of

Health, Ethiopia



CRISTINA PUIG
Coordinator, European
Consortium of Emergency
Contraception (ECEC)



#RHSUPPLIES2023





Government-led MNCH Commodity Market Provides Lessons Learned for Greater Resilience and Ensuring Access to RH Supplies

October 19, 2023

Biruk Hailu Tesfaye, Ethiopia Ministry of Health Cammie Lee, Bill and Melinda Gates Foundation (presenting on work from Results for Development)



16-20 OCTOBER 2023 ACCRA, GHANA #ITSABOUTSUPPLIES RHSUPPLIES.ORG/GMM2023

Government-led MNCH commodity markets offer lessons learned as Reproductive Health markets transition away from donor support



Results for Development, with support from the Bill and Melinda Gates Foundation, is supporting improved access to MNCH products

Phases of work



Conducted **market diagnostic** to understand "which" are MNCH commodity priorities and "what" is inhibiting scale-up



Co-created strategies with stakeholders at country, regional, and global levels to address identified MNCH market challenges





Implementing catalytic interventions:

- Produce global public goods to address market information asymmetries, and
- 2 Address demand, supply, and financing barriers in Ethiopia



We are focused on

14 priority MNCH products



at the



global and regional-levels

and in

5 focus geographies











Ethiopia

Nigeria (Kano)

Kenya

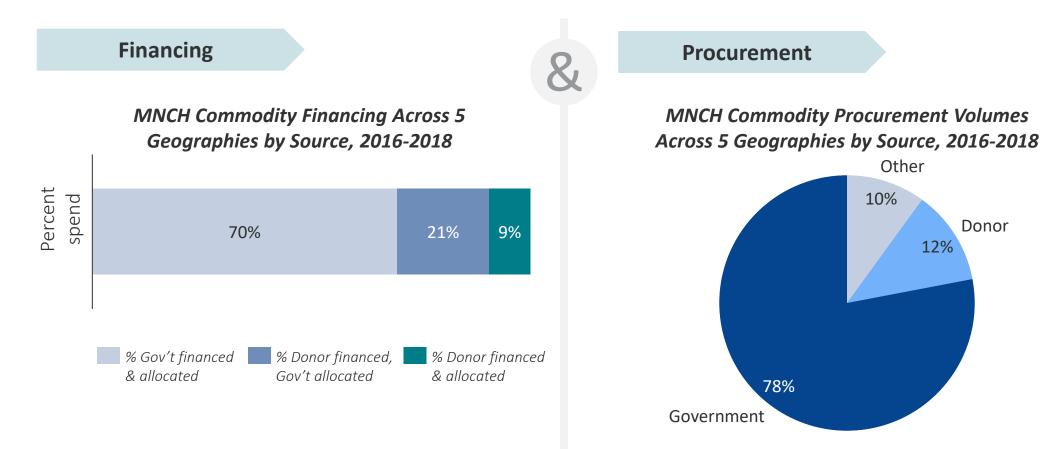
Tanzania

Uganda



The market diagnostic confirmed MNCH commodity markets are government-led

In the public sector, governments lead the majority of...





While governments are leading financing and procurement of MNCH commodities, key market challenges are inhibiting access.

A few examples of these challenges include:

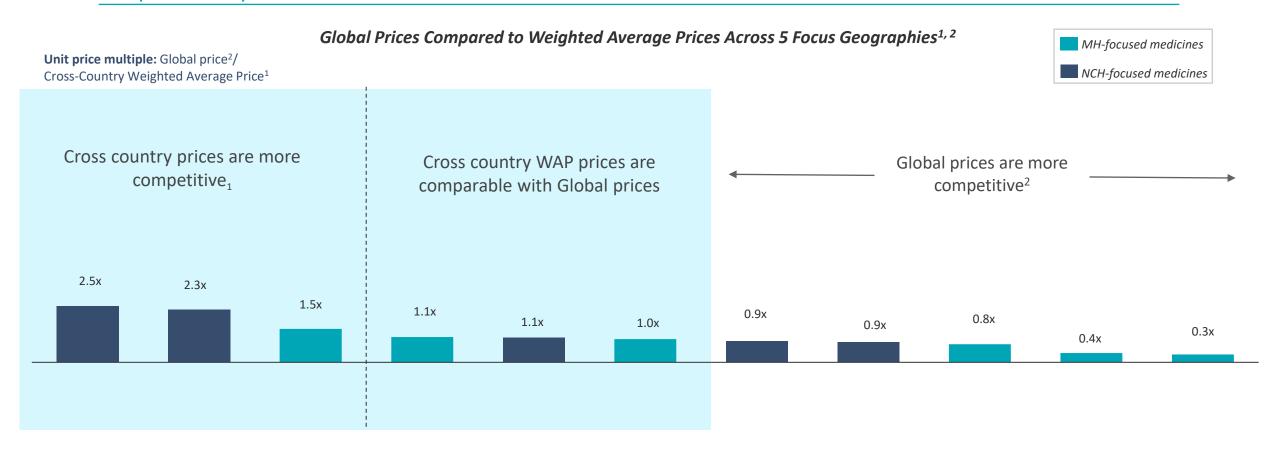








When comparing Global prices to country-level procurement prices for 11 SKUs in common, prices for 45% and 27% of them have lower and comparable prices respectively



- Cross-country weighted average prices include prices gathered from country government procurement agencies (EPSA, FMOH, MSD, NMS, KEMSA, DMCSA), other procurement agencies (JMS, SOML), and donors between 2016-2018. A cross country weighted average price was taken for SKUs across all in-country procurement sources between 2016-2018 and calculated as the smallest unit of measure per pack size. In Uganda, Ethiopia, and Tanzania, UNICEF or UNFPA procured 7 of the SKUs shown above for these countries, and their prices are included in the in-country prices due to complexity of separating out prices: Amoxicillin 250mg DT (Uganda, Ethiopia), Gentamycin 10mg/ml 2ml injection (Ethiopia), Gentamycin 40mg/ml 2ml injection (Ethiopia), Magnesium Sulphate 50% 10ml injection (Ethiopia, Tanzania), Misoprostol 200mcg tablet (Uganda, Tanzania), Zinc/ORS co-pack (Uganda), Oxytocin 10IU/ml 1ml injection (Uganda, Ethiopia, Tanzania)
- Global level prices were gathered from UNICEF and UNFPA supply catalogues accessed in January 2020 and matched to country procured SKUs, including pack size. Prices were determined on a two-pass model where first SKUs with a corresponding UNICEF price were identified. If no price existed, then a UNFPA price was identified. Not all SKUs procured in countries were available on the UNICEF or UNFPA catalogue because pack sizes were different or UNICEF or UNFPA did not offer a particular SKU. In addition, the difference between global and cross-country price is probably even greater for a few SKUs than what is shown here because UNICEF and UNFPA procurements in countries were included into the in-country weighted average prices, which were used to calculate the cross-country weighted average prices for each SKU



For government-led MNCH markets, a 2-pronged approach is required to holistically shape the market

Identified Challenges

Market information asymmetries around quality and price

Catalytic Interventions

- ❖ Reference Price List
- Quality-AssuredSupplier List



A healthy, country-led
MNCH market
facilitating widespread
access to affordable,
high-quality medicines

Identified Challenges

- Regulatory fragmentation
- Few or no registered high-quality products
- Insufficient domestic resource mobilization



- Regional registration harmonization efforts
- Business case to internal manufacturers to register
- Domestic resource mobilization and evidence-based advocacy





Evolution of RH Market in Ethiopia

Maternal, Child, Adolescent Health Services LEO Ministry of Health, Ethiopia

Biruk Hailu, MOH Ethiopia



የዜታች ጤና ለሃፖር ብልጽማና!



The Reproductive Health Supply market in Ethiopia has evolved significantly over the past two d ecades

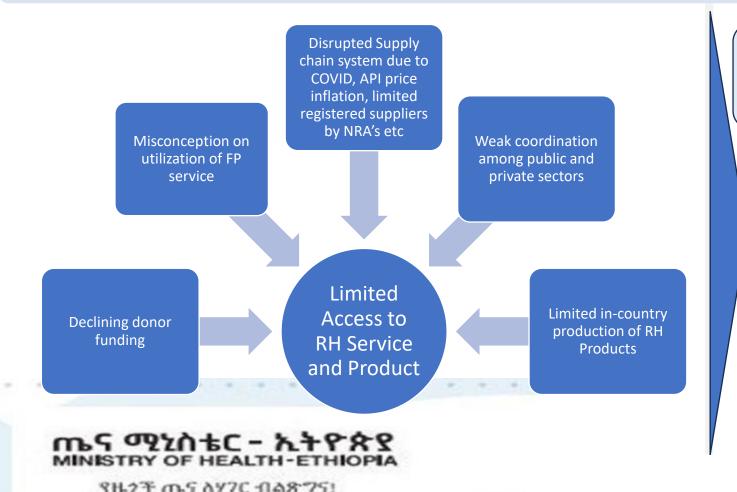
- Initially the market was dominated by the public sector but recently the private sector is also playing an important role.
- Increased availability of reproductive health supplies has led to an increased use of contraception.
- Health sector transformation plan (HSTP I and II) were pushing factors for the increment of both public and private markets.





Financing for family planning services in Ethiopia currently comes from three main sources: the GoE (from tax revenues and loan), External Sources (Donor Pooled Fund and bilateral donors) and households (in the form of out-of-pocket payments)

For 2022/23 fiscal year, Government of Ethiopia increased its contribution to ~USD 2million dollar (i.e 2x of 2020/21 allocated budget, However access to RH products continue to be a problem due to global and in-country level system and market bottlenecks



GOE developed Strategic Initiatives for *Access to quality RH services* to all women and girls regardless of their income or location through alleviating:

- Unmet need 22%(2021) 19.1% in 2025
- > 50% of mCPR by 2025 1.8% increase each year
- TFR from 4.1 3.2
- > FP 2030 commitment



MOH currently working on building resilient and sustainable financing options for all exempted services that are provided for free to patients — services including FP, MNCH, and other programs

This is a kind request for donors, implementing partners and other key interested stakeholder to coordinate with the Government of Ethiopian to support current efforts that support Government of Ethiopia to achieve 2030 Commitment:

- Build Sustainable Financing options for RH and MNCH services and products
- Working towards building strong supply chain system through strengthening local production of FP and MNCH Program products.
- Creating Competitive Market for FP and MNCH product through expanded and strategized supply base and procurement mechanisms respectively.











Trends in Emergency Contraception Markets of LMICs

Cristina Puig Borràs (ECEC)

New & Underused Reproductive Health Technologies Caucus

October 19th, 2023 (Session 17)



Outline:

- 1. About ECEC
- 2. Trends in EC markets in LMICs
- 3. From underused to overused?

Thank you to:

- DKT International
- USAID Global Health Supply Chain Program - Procurement and Supply Management
- Suzanne Gold (PSM)

Acronyms used:

LNG: Levonorgestrel

UPA: Ulipristal acetate

EC: Emergency contraception

ECPs: Emergency contraception pills

ESC: European Society of Contraception and RH

ECEC: European Consortium for EC

ICEC: International Consortium for EC

Declaration of competing interests

To date, ECEC has received support from:

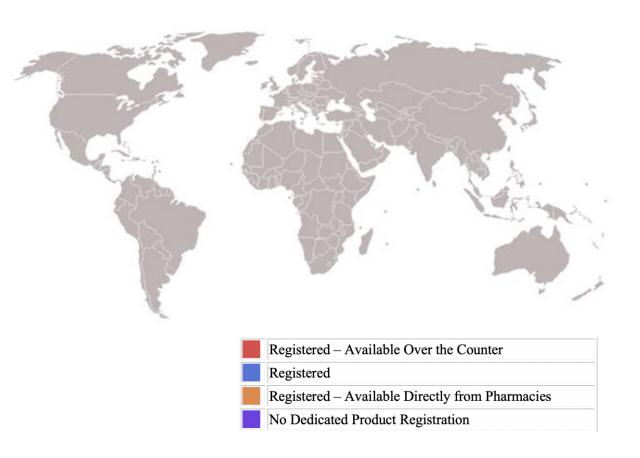
- HRA Pharma / Perrigo
- DKT International
- Magna Pharm
- European Society of Contraception and Reproductive Health (ESC)
- International Consortium for Emergency Contraception (ICEC)
- World Health Organization / UN Commission on Life Saving Commodities for Women and Children
- Gedeon Richter

1. About ECEC

Founded in 2011/12, initially as a branch of ICEC



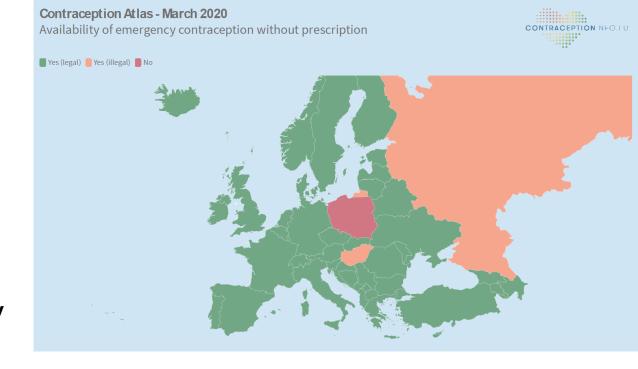






Mission:

- Expand knowledge about and access to emergency contraception (EC) in European countries
- Promote the standardization of EC service delivery in the European context.



Advisory committee:

- Sharon Cameron, UK (*)
- Kristina Gemzell, Sweden
- Anna Glasier, UK
- O Caroline Moreau, France

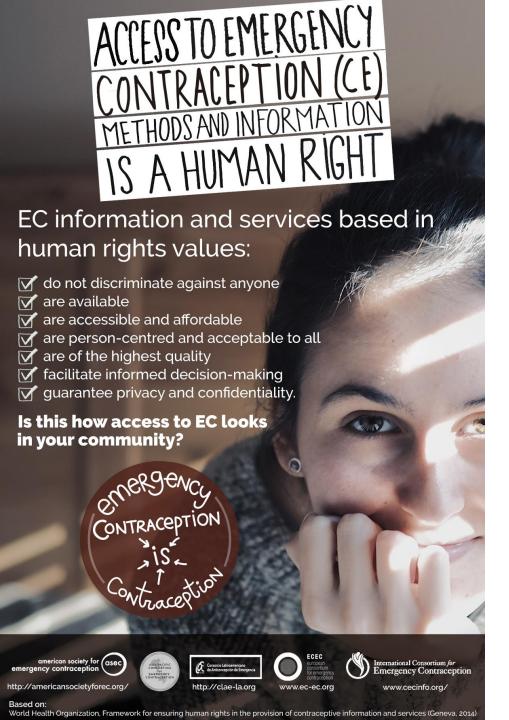
Host agency:

East European Institute for Reproductive Health (EEIRH)

www-ec-ec.org

Community of Practice (IBP):





ECEC works from an evidence- and rights-based approach.



Strategic objectives:

Knowledge



Generate knowledge on EC use and access in Europe and serve as an information-sharing platform

<u>Advocacy</u>



Disseminate research findings and promote the use of evidence-based information for policy and program development

Information, Education, Communication



Develop and disseminate information, education and training materials

Quality of Care



Reduce access inequalities by promoting the standardization of quality of care for EC services across the region



The EC wheel

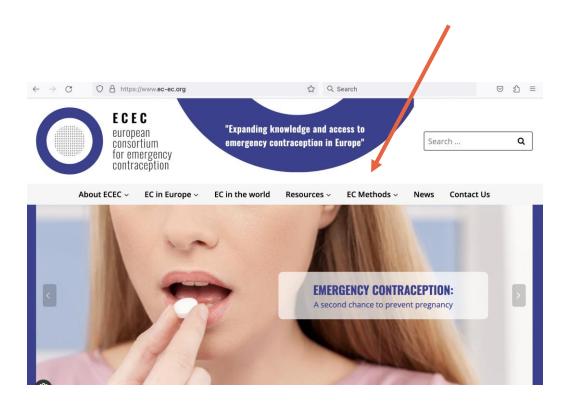


- EC counselling tool for pharmacists and health providers, developed in 2016 by ECEC, with support and endorsement from ESC.
- Available in English and French.
- Digital version created by WHO in 2017.
- Based on the WHO MEC 2015 and the UK Faculty of Sexual and Reproductive Healthcare recommendations for EC use.
- Provides recommendations on use of LNG and UPA ECPs, or Cu-IUD for emergency contraception.



How to access the online EC wheel:

https://www.ec-ec.org/ecmethod/





September 2023

Dispensing emergency contraceptive pills according to the evidence and human rights: the role of pharmacists

A CONSENSUS STATEMENT ENDORSED BY:









In most countries in Europe (and in many other countries around the world) two forms of emergency contraceptive pills are accessible: both levonorgestrel and ulipristal acetate pills are available in pharmacies without a prescription¹. In this situation, pharmacy teams play an important role in facilitating access for women. Yet, significant variances in dispensing practices have been identified, leading to access disparities.²



- Since 2022, ICEC is no longer operational (website, database, etc).
- RHSC repository of ICEC materials.
- ECEC has expanded its mission to work beyond Europe:
 - Continue providing technical assistance outside of Europe (i.e: Honduras, Japan, Peru...)
 - Developing a new global database on EC availability.
 - Conveying global partners to advance EC access.



emergency contraception in Europe"

Search ...

About ECEC ~

EC in Europe ~

EC in the world

Resources ~

EC Methods ~

News Contact Us

Emergency contraception in the world

Postcoital contraceptive methods are available in most, but not all, countries and territories of the world. Emergency contraception pills (ECPs), also popularly called the "morning after pill", are the most used method of emergency contraception. Three types of ECPs (with different active ingredients) are available:

- ECPs with 1,5 mg of levonorgestrel (LNG ECPs)
- ECPs with 30 mg of ulipristal acetate (UPA ECPs)
- ECPs with 10 to 25 mg of mifepristone (mife ECPs)

In order to access ECPs, EC products need to be available. Dedicated EC products with LNG, UPA, and mifepristone are packaged and labelled specifically for EC use. These products can only be accessed locally if they are registered and/or imported.

This page provides information about countries where LNG, UPA and mife ECPs are available, registered or imported. The previous summary of ECPs registration by country, was published in 2014 by the International Consortium for Emergency Contraception (see here). In 2023, ECEC updated this information. This summary is based on data from:

- Gedeon Richter and HRA Pharma product registration records (January 2023)
- DKT International sales report (2022)
- DADA Consultancy B.V, personal communication
- Contraceptive Security Indicators(CSI) Survey <u>reports</u> and <u>technical brief</u> on EC
- Asia Pacific Consortium for Emergency Contraception <u>database</u>
- · European Consortium for Emergency Contraception database

We thank these organizations for kindly providing information of the registration status of their ECPs products worldwide. For more specific information about countries of the Asia Pacific region, visit the Asia Pacific Consortium for Emergency Contraception website. For more information about the United States of America, visit the American Society for Emergency Contraception. Data on EC trends in selected Africa, Asia and Latin American countries from the CSI reports, is available here. For more information about specific European countries, vist the section country-by-country-information of our website.

Please note that different brands of one same type of ECP product can be registered with different status in the same country. One brand of LNG ECPs may be registered as OTC and another one as BTC in the same country.

AVAILABILITY OF EC PILLS

ECPs with levonorgestrel (LNG) (either one pill of 1,5 mg or two pills of 0,75 mg formulations):

Available and/or registered as behind- or over-the counter (BTC and OTC) in 84 countries (registered or imported):

Argentina(**), Albania, Andorra, Armenia, Aruba, Australia, Austria, Azerbaijan, Belarus, Belgium, Benin, Bulgaria, Burkina Faso, Bhutan, Cameroon, Canada, Chile, China, Colombia, Congo Brazzaville, Congo (DRC), Costa Rica, Croatia, Cyprus, Czech Republic, Denmark, Djibouti, Ecuador, Estonia, Finland, France, Gabon, Georgia, Germany, Ghana, Greece, Guinée (Conakry), Iceland, India, Indonesia, Ireland, Israle, Italy, Ivory Coast, Kiribati, Kuwait, Kyrgyzstan, Laos, Latvia, Lithuania, Luxembourg, Macedonia, Madagascar, Mali, Malta, Mauritius, Mongolia, Montenegro, Namibia, Netherlands, New Zealand, Niger, Norway, Portugal, Moldova (Rep. of), Romania, Senegal, Serbia, Slovak Republic, Slovenia, South-Africa (Lesotho, Swaziland), Spain, Sri Lanka, Suriname, Sweden, Switzerland, Tajikistan, Togo, Turkmenistan, United Kingdom, Uruguay, United States of America, Uzbekistan, Venezuela, Vietnam

Available and/or registered as prescription products (Rx) in 37 countries: (In some countries they may be usually sold without prescription)

Bolivia, Brazil, Colombia, Curação, Dominican Rep., Ecuador, El Salvador, Egypt (Arab Rep.of), Guatemala, Hong Kong, Hungary, Indonesia, Jamaica,

2. Trends in Emergency Contraception Markets of LMICs





Looking back....

International Journal of Gynecology and Obstetrics xxx (2013) xxx-xxx



Contents lists available at SciVerse ScienceDirect

International Journal of Gynecology and Obstetrics

journal homepage: www.elsevier.com/locate/ijgo



REVIEW ARTICLE

A review of global access to emergency contraception

Elizabeth Westley a,*, Nathalie Kapp b, Tia Palermo c, Jennifer Bleck d

- ^a Family Care International, NY, USA
- b World Health Organization, Geneva, Switzerland
- ^c Stony Brook University, NY, USA ^d University of South Florida, FL, USA

ARTICLE INFO

Article history: Received 11 March 2013 Accepted 24 June 2013

Keywords: Contraceptive access Contraceptive policies Emergency contraception Low-income countries

ABSTRACT

Background: Emergency contraception has been known for several decades, and dedicated products have been on the market for close to 20 years. Yet it is unclear whether women, particularly in low-resource countries, have access to this important second-chance method of contraception. Objectives: To review relevant policies, regulations, and other factors related to access to emergency contraception worldwide. Search strategy: A wide range of gray literature was reviewed, several specific studies were commissioned, and a number of online databases were searched. Main results: Several positive policies and regulations are in place: emergency contraception products are registered in the majority of countries around the world, listed in many countries' essential medicines lists, included in widely used guidance, and supported by most donors. Yet analysis of demographic data shows that the majority of women in low-income countries have never heard of emergency contraception, conclusions: Despite more than a decade of concerted international and country-level efforts to ensure that women have access to emergency contraception, accessibility remains limited.

women have access to emergency contraception, accessibility remains limited.

© 2013 International Federation of Gynecology and Obstetrics. Published by Elsevier Ireland Ltd. All rights reserved.

"Despite more than a decade of concerted international and country level efforts to ensure that women have access to emergency contraception, accessibility remains limited. Data indicate that the large majority of women in lowincome countries are unaware that emergency contraception exists as an option. The majority of social marketing family planning programs do not include an emergency contraception product, and approximately half of low-resource countries surveyed do not offer emergency contraception through national healthcare systems."

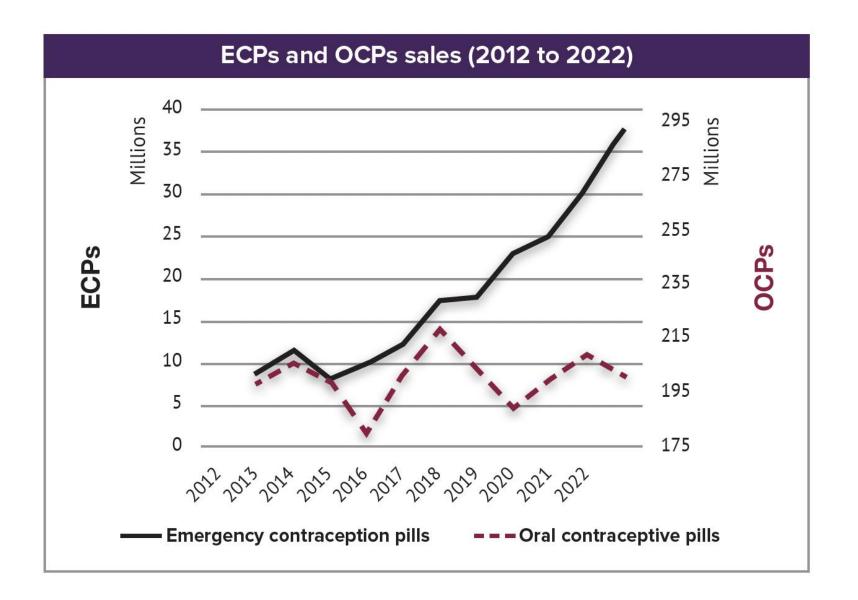
https://www.rhsupplies.org/uploads/tx_rhscpublications/Westley-Kapp-et-al.-Review-of-global-access-to-EC-IJGO-2013.pdf (2013)

a) EC sales from social marketing programs have increased by 300% since 2012

Units of emergency contraception pills (ECPs) and oral contraceptive pills (OCPs) packs, sold from 2012 to 2022:

| Emergency contraception pills (ECPs)* | | | Oral contraceptive pills (OCPs)** | |
|---------------------------------------|-------------------|----------------------|-----------------------------------|----------------------|
| Year | ECP sales (units) | Percentage change | OCP sales (units) | Percentage change |
| 2012 | 8.910.663 | - | 199,490,301 | - |
| 2013 | 11.519.695 | 29% | 206,595,373 | 4% |
| 2014 | 8.080.234 | -30% | 199,928,412 | -3% |
| 2015 | 9.909.276 | 23% | 181,022,855 | -9% |
| 2016 | 12.313.146 | 24% | 203,074,982 | 12% |
| 2017 | 17.361.364 | 41% | 219,109,418 | 8% |
| 2018 | 17.725.577 | 2% | 204,621,849 | -7% |
| 2019 | 22.942.885 | 29% | 189,793,768 | -7% |
| 2020 | 25.050.655 | 9% | 201,191,988 | 6% |
| 2021 | 30.642.191 | 22% | 209,606,713 | 4% |
| 2022 | 37.615.541 | 23% | 202,304,902 | -3% |
| Average percentage change: | | 15.7% | | 0.4% |
| 2012 – 2022 percentage change: | | 322.1% | | 1.4% |



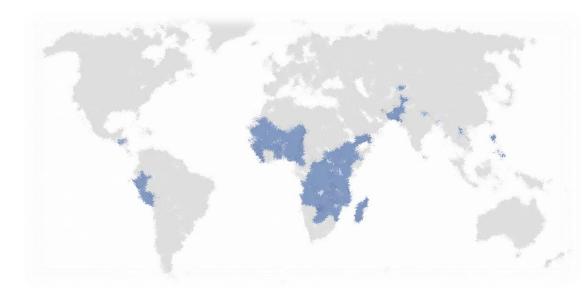


For more details:

https://www.dktinter national.org/contrace ptive-socialmarketing-statistics/

USAID Global Health Supply Chain Program

Contraceptive Security Indicators Survey

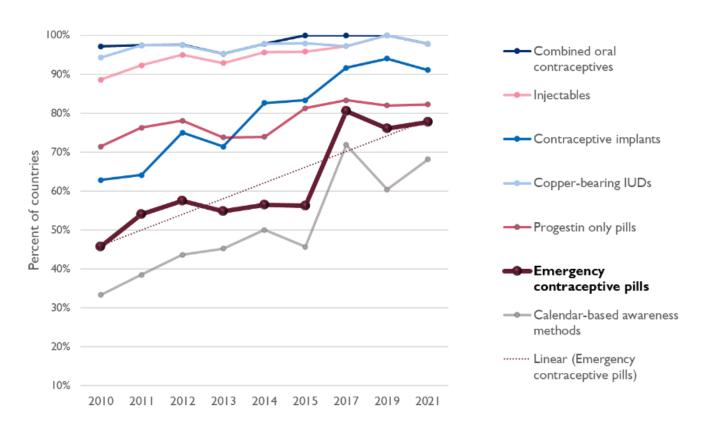


42 Countries

| Angola Bangladesh Benin Botswana Burkina Faso Burundi Cameroon Cape Verde | El Salvador Ethiopia Ghana Guatemala Guinea Haiti Honduras Kenva | Lao PDR Liberia Madagascar Malawi Mali Mauritania Mozambique Nepal | Nigeria Pakistan Peru Philippines Rwanda Senegal Sierra Leone South Sudan | Tanzania Togo Uganda Yemen Zambia Zimbabwe |
|---|---|--|---|---|
| | | | • | |

b) Since 2010, ECPs have been one of the fastest growing methods offered in the <u>public sector</u>

FP methods offered in the public sector





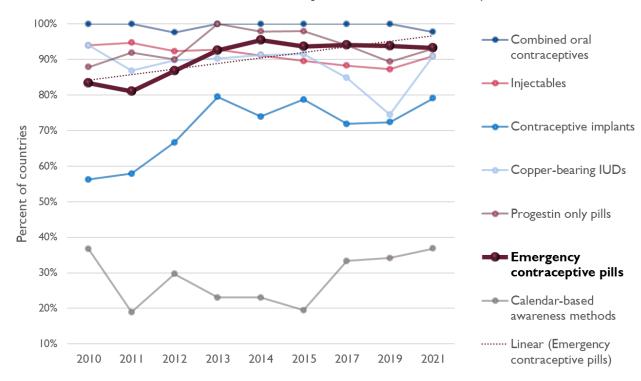
In 2010, only 46% of reporting countries offered ECPs in the public sector. By 2021, this number had grown to 78% of countries.

However, in the public sector, ECPs are mostly restricted to distribution at health facilities and by higher level health providers.

c) In the <u>private sector</u>, ECPs continue to be one of the most commonly offered family planning methods across countries



FP methods offered in the private sector (% of countries)

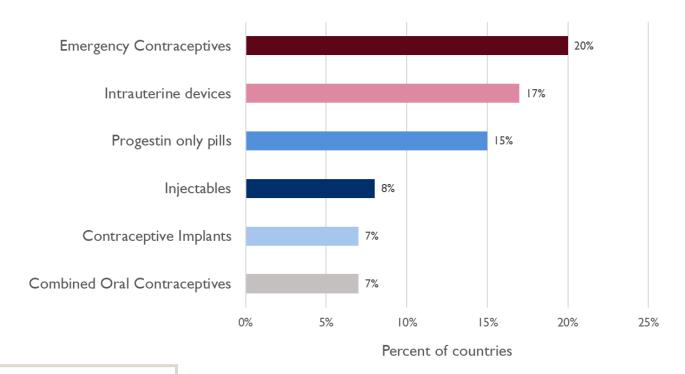


In 2021, 93% of reporting countries offered ECPs in the private sector, a level that has been consistent for the past decade.

d) ECPs are less likely to be quality-assured than other FP methods



% of countries with FP methods with no Stringent Regulatory Authoritiesapproved or WHO-prequalified products registered for distribution

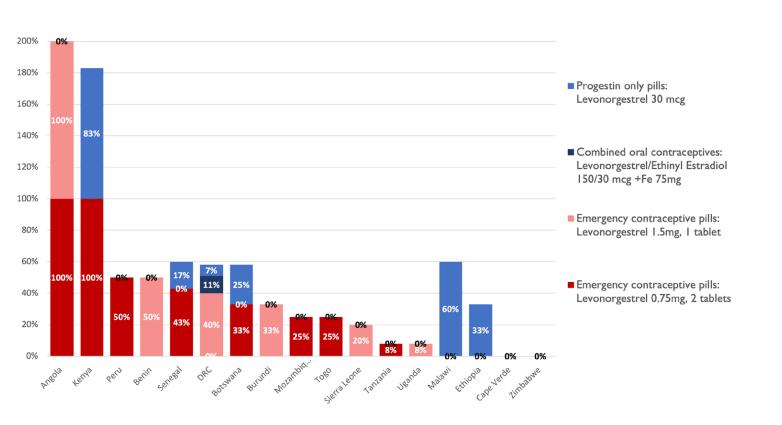


In 2021, 20% of surveyed countries reported that no Stringent Regulatory Authority (SRA) or WHO-prequalified ECPs were registered for distribution.

e) Countries are more likely to stock out of ECPs at central medical stores than they are to stock out of other FP products.



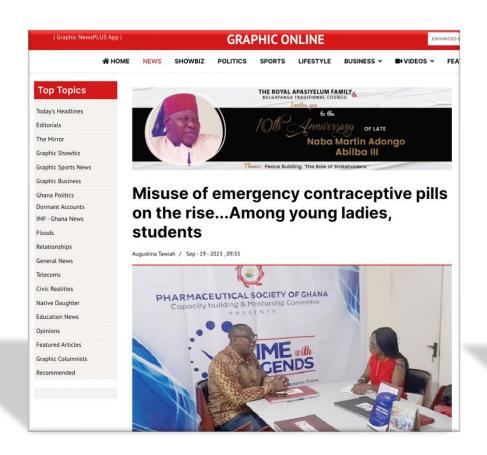
Average annual stockout rate at central warehouses, 2021

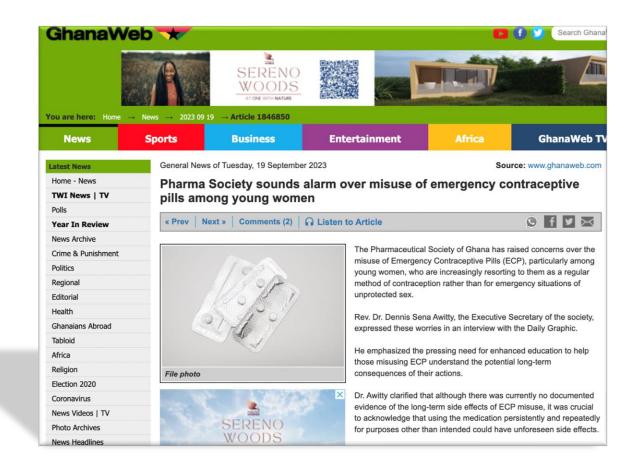


Only 29% of countries reported on ECP stockout rates at <u>central level</u>. Among those, many countries faced high rates of stockout.

ECP stockout rates seem to be higher at <u>service delivery</u> points.

3. From underused to overused?





Repeated use of ECPs

- Repeat use of both LNG and UPA ECPs (not concomitant) has been studied and findings suggest it is safe and efficacious.
- Can result in increased side-effects, such as menstrual irregularities, but it poses no known health risks.
- It is acceptable for women (not only for young women).
- Shows increased awareness of postcoital contraceptive choices.
- It is happening; it is a fact!

Providing up-to-date information on how to safely and effectively use ECPs, every time a woman is at risk of pregnancy, is key.

It is time to destigmatize the repeated use of ECPs.

- Join the ECEC/ICEC community of practice to continue this discussion.
- Visit our website for more info: www.ec-ec.org
- Please share your campaings and strategies to improve access to EC with our community. We have a lot to learn from each other.

Thank you!

Contact: cpuig@eeirh.org

FACILITATED DISCUSSION



SARAH WEBB Senior Technical Officer, RHSC



CAMMIE LEE
Senior Program Officer,
Maternal Newborn & Child
Health, BMGF

presenting on behalf of R4D



BIRUK HAILU TESFAYE

Maternal & Child Health

Expert, Ministry of

Health, Ethiopia



CRISTINA PUIG
Coordinator, European
Consortium of Emergency
Contraception (ECEC)

THANK YOU!