Summary of the Landscape Analysis of Reproductive & Maternal Health Products in Sub-Saharan Africa

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Increase the supply of safe, effective medicines, vaccines, and trusted diagnostics. USP strengthens health systems at local, regional, and global levels and delivers end-to-end pharmaceutical services that champion equitable access to quality medical products.
Assessment of the production of RMH products in SSA

Efforts to increase supply of the **quality-assured products sources** should be **strategic**, **market-based** and carried out with cross-sectional support.

<table>
<thead>
<tr>
<th>Landscape Analysis</th>
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<tr>
<td>Study to understand <strong>bottlenecks</strong>, identify existing and potential manufacturers to <strong>build a more reliable and sustainable production</strong> in <strong>Sub-Saharan Africa</strong></td>
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**Products included:**
- Oxytocin
- Magnesium sulfate
- Heat-stable carbetocin
- Misoprostol
- Tranexamic acid

1. Identify all manufacturers reproductive maternal health (RMH) product suppliers in SSA.
2. Assess the manufacturers’ capacities, including their production capacity, quality assurance (QA) systems, regulatory status, and existing customer base.
3. Project the future demand for SSA from major procurers and gaining a greater understanding of private sector demand for these MH supplies in SSA.
4. Compare the regional manufacturing base with the projected demand.
5. Identify the significant gaps and challenges to arise from this assessment.
6. Determine the actions and resources to address gaps and challenges effectively.
Snapshot of pharmaceutical manufacturers in Africa

Africa’s pharmaceutical manufacturers by country (2020)
Total: 600

3 main factors can explain the high concentration of manufacturers in a country:
• Legacy from past industrialization
• National trade and industrial policies
• Strong local demand

Focus countries chosen based on:
• regulatory maturity level,
• number of manufacturers, and
• have at least one manufacturer with WHO PQ’ed product

Pharmaceutical manufacturers by ownership (2020)

60% Local manufacturers
15% African groups
25% Multinational companies

CGD, Kaufman J. et al, 2021
## Summary of RMH products procured by various countries

Completed the supply data collection in **Ethiopia, Ghana, Kenya, Tanzania, Uganda, South Africa, and Zimbabwe.**
The data collected include the **strength, dosage form, supplier and manufacturers countries of origin** of each product.

<table>
<thead>
<tr>
<th>RMH Product</th>
<th>Ethiopia</th>
<th>Nigeria</th>
<th>Kenya</th>
<th>South Africa</th>
<th>Ghana</th>
<th>Tanzania</th>
<th>Zambia</th>
<th>Zimbabwe</th>
<th>Uganda</th>
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<td>Carbetocin Ferring 100 mcg/ ml Inj</td>
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Reproductive & maternal health products manufactured in sub-Saharan Africa

- **Nigeria:** 3 products
  - Misoprostol
  - Oxytocin
  - Magnesium sulfate

- **Kenya:** 2 products
  - Magnesium sulfate
  - Tranexamic acid

- **South Africa (1):**
  - Magnesium sulfate

- **Ethiopia:** 1 product
  - Magnesium sulfate

We attempted to survey all 6 current manufacturers. 5 responded to our survey (83% response rate)

We identified companies in Nigeria and Ghana with plans to begin production of the certain products in the near terms. Their survey is being finalized.

**Types of data collected**

- Overall production capacity
- Production capacity of the RMH products
- QA & Regulatory compliance indicators
- Barriers and market dynamics that impact manufacturing of RMH products

- **6 Manufacturers** identified
  - 2 in Nigeria, 2 in Kenya, 1 in South Africa, 1 in Ethiopia
- **Most manufactured product is magnesium sulfate** (5 manufacturers)
- **No producer** of heat-stable carbetocin
Understanding the demand

- **Public sector demand**
  - Kenya, Ethiopia, South Africa

- **Import data**
  - Nigeria, Ethiopia, Kenya

- **Demand from major international organization**

Overall demand in producing countries

Gap analysis & recommendation to local production
Challenges and next steps

**Challenges – Access to data**

- Inconsistencies, unavailability, lack of access to registration data from some NRAs
- Delayed responses or lack of responses from stakeholders, including manufacturers
- Limited access to procurement data (public, private, donors)

**Next Steps**

- Desk Review: Completed
- Develop tools: Completed
- Data collection: Completed
- Data analysis & complementary data collection: Ongoing
- Report Due in September: Ongoing
Thank You

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Empowering a healthy tomorrow