

Global Fund, PEPFAR, Republic of South Africa Demand Management Nov 2017 Update

November 2017
Geneva, Switzerland



Republic of South Africa

The Global Fund, PEPFAR and Government of South Africa are working together to improve the consolidated demand outlook



What we will do

Coordinated approach and messages

Synergistic strategies

Direct engagement with suppliers & supplier visits (sometimes)

Align on **key supplier performance metrics**

Sharing of **synthesized market intelligence** and general supplier performance

Sharing information (without providing confidential / sensitive information)

Providing **improved demand visibility**



What we will not do together

Long-term agreements with manufacturers

Selection of suppliers and demand allocation

Execution of **purchase orders**

We will not manage actual **supplier performance jointly**

Managing **overall supplier performance** (Price, lead-time, delivery etc.)

Consolidated demand forecast is derived in 5 simple steps

- 1 Gather order information** from across top ~10 countries and South Africa for top 12 products,
- 2 Translate order dates to the dates when order is placed towards the supplier**, adjusting for shipment lead times if necessary
- 3 Consolidate the information from** Global Fund, PEPFAR and The Government of South Africa
- 4 Triangulate the data** with the general population information and historical order patterns
- 5 Prepare a product-specific quarterly forecast breakdown** and share it with supplier and countries for their feedback

Caveats and limitations to the current version of the visibility data

- **Conservative estimates** based on currently confirmed orders, but exact timing may shift
- Prepared based on **data currently available** to Global Fund, Government of South Africa and PEPFAR
- **Preliminary estimates for the discussion** – and not final purchase commitments
- **May not yet fully capture lead times** between order placement at manufacturer and in-country delivery
- **Third joint consolidated procurement** forecast

Consolidated Demand Forecast Outlook

Overall ARV Demand Outlook

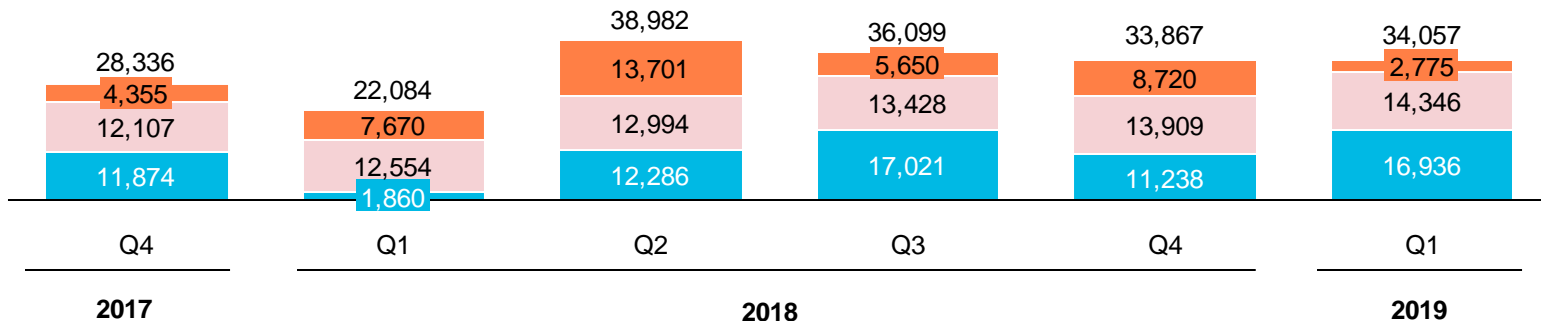
2017-2019, Number of packs, thousands

Bold font – non-PPM countries Regular font – PPM countries

- PEPFAR
- Republic of South Africa
- Global Fund

- Malawi
- Tanzania
- Zimbabwe**
- Ethiopia**
- Zambia
- Kenya**
- Mozambique
- Nigeria
- Uganda
- Cote d'Ivoire

- TLE/TEE/TLE 400
- TLD
- DTG 50
- LZN (adult)
- LZN (pediatric)
- Lpv/r(adult)
- Atz/r
- TL
- LZ (adult)
- EFV 600
- NVP 200



NOTE: Dates used are vendor INCO fulfillment dates. For the ease of analysis we excluded South Africa from The Global Fund funding. For South Africa, TEE is a predominant first-line instead of TLE.

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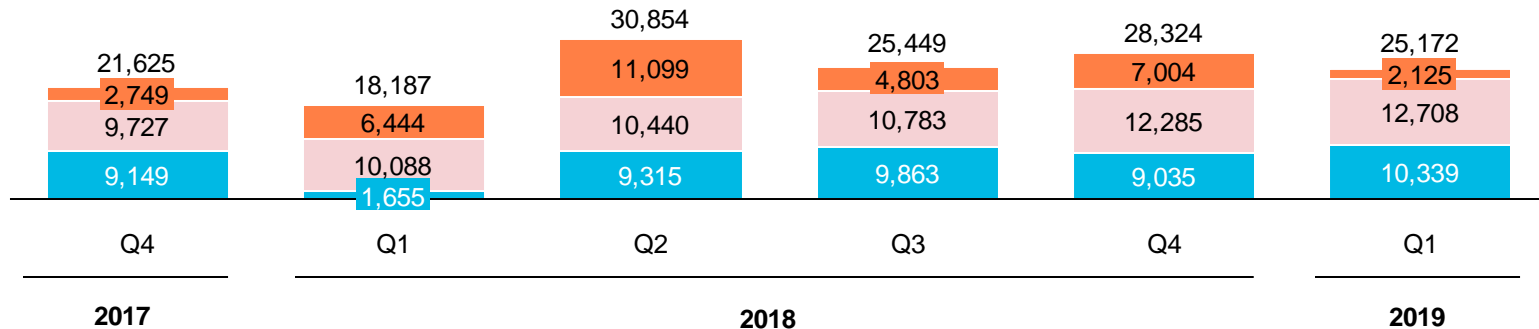
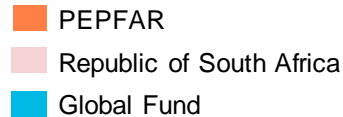
SOURCE: PEPFAR, Government of South Africa, Global Fund

TLE/TEE/TLD – Consolidated Demand Forecast Outlook

ARV Demand Outlook

2017-2019, Number of packs, thousands

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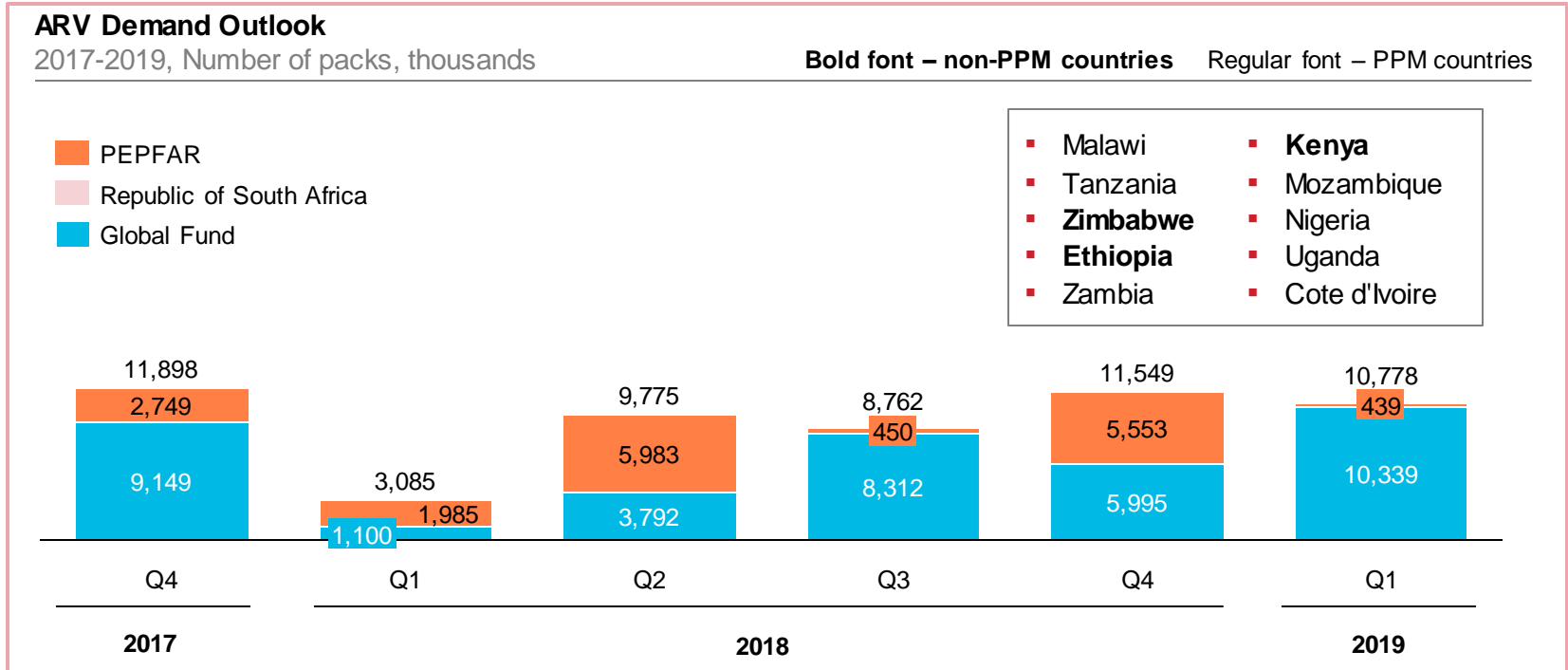


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TLE 600– Consolidated Demand Forecast Outlook

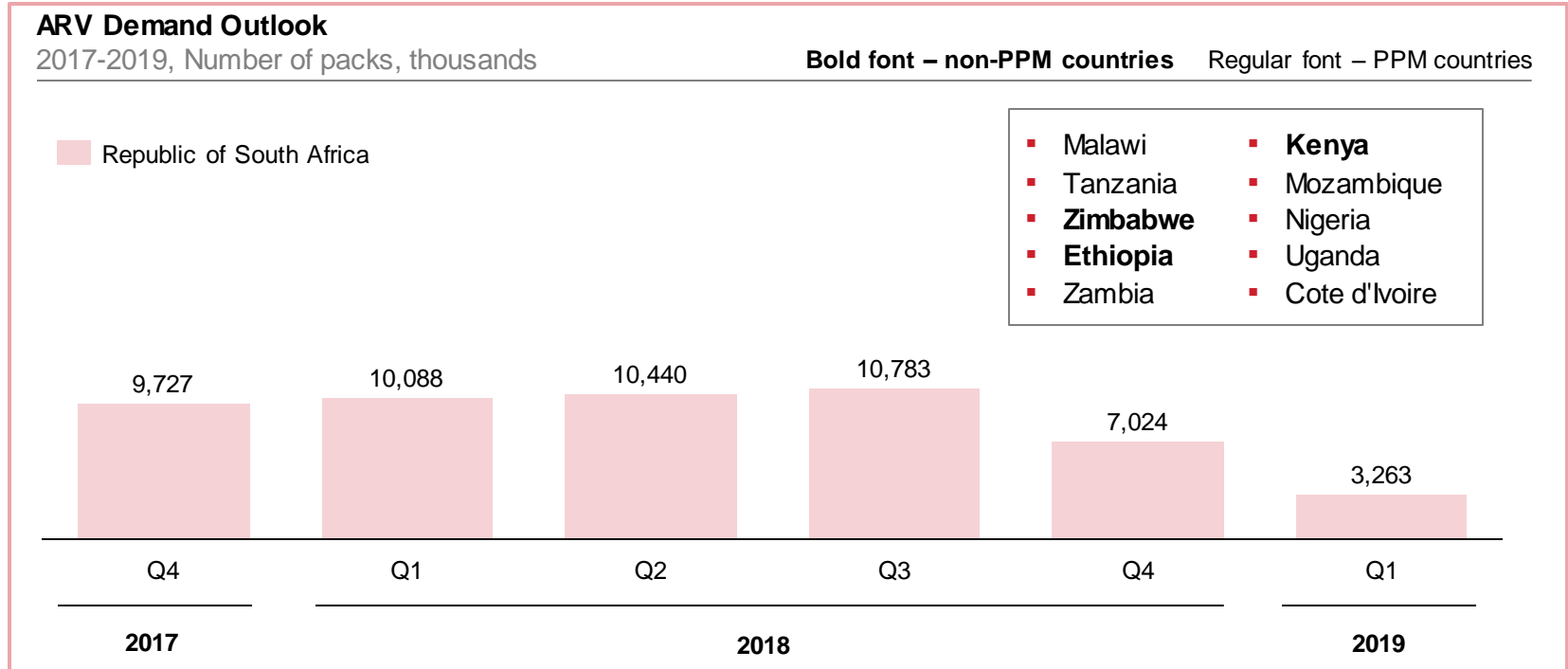


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TEE– Consolidated Demand Forecast Outlook

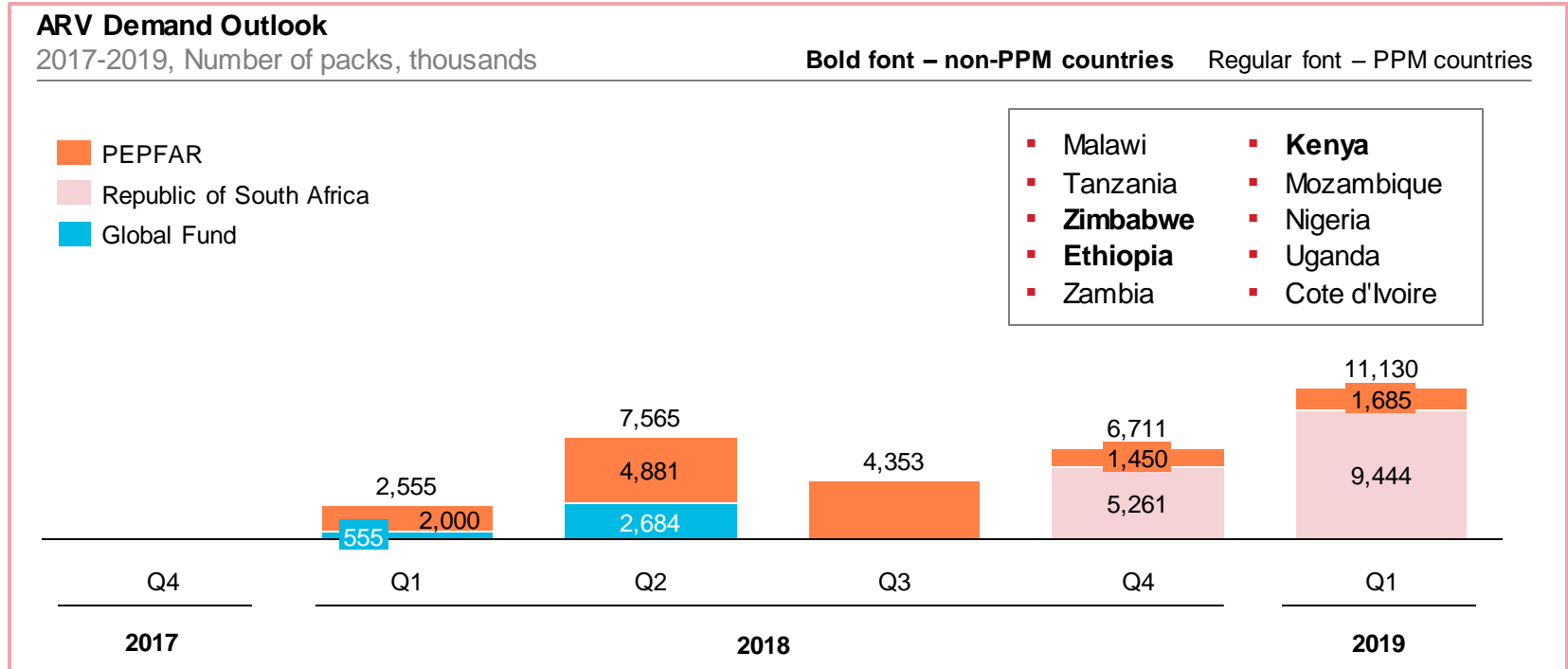


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TLD – Consolidated Demand Forecast Outlook

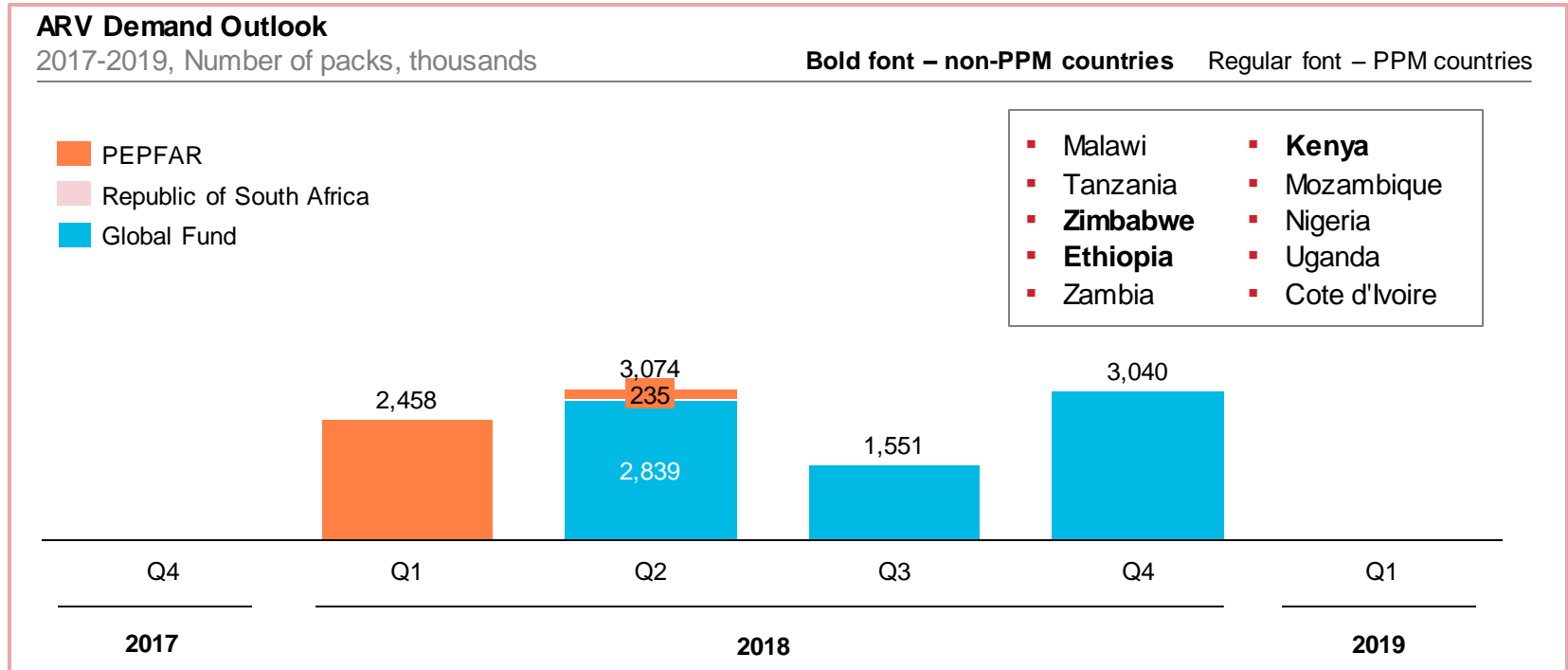


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TLE 400– Consolidated Demand Forecast Outlook

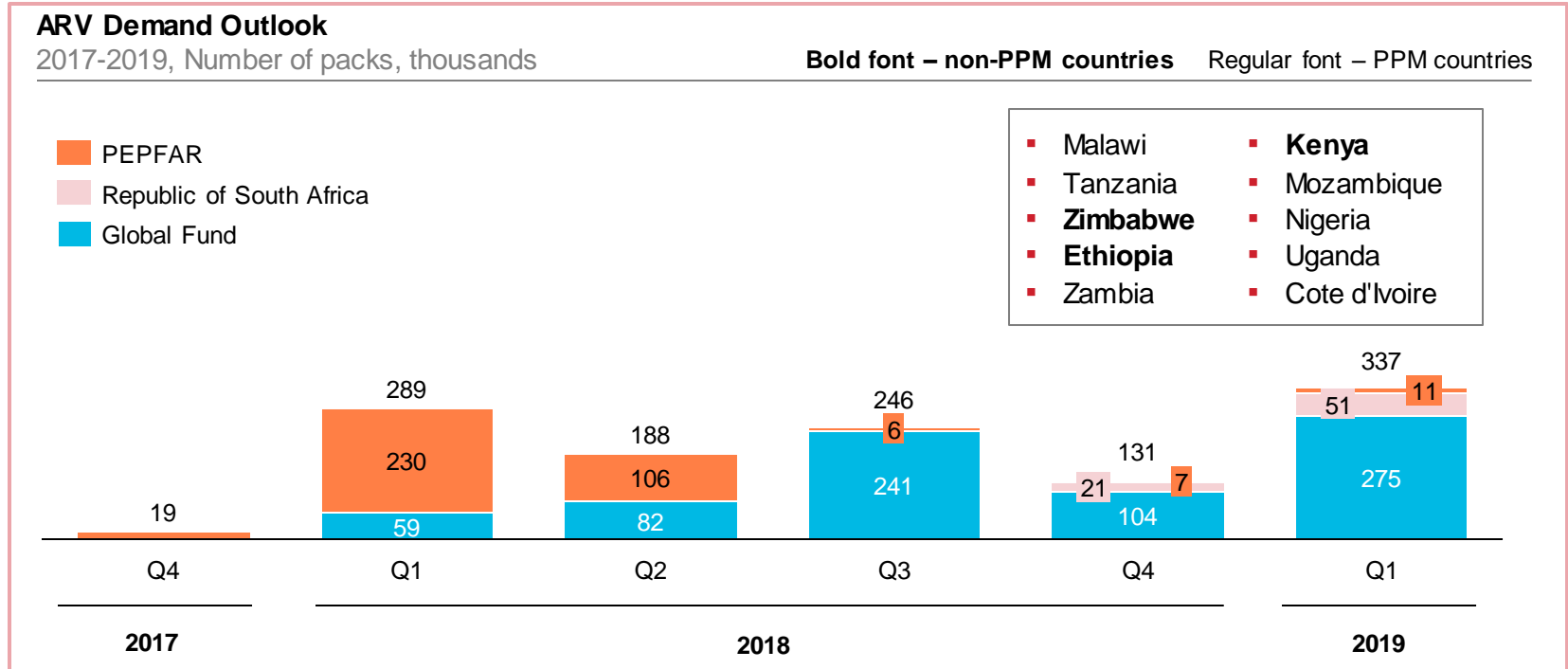


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DTG 50– Consolidated Demand Forecast Outlook



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LZN (Adult) – Consolidated Demand Forecast Outlook

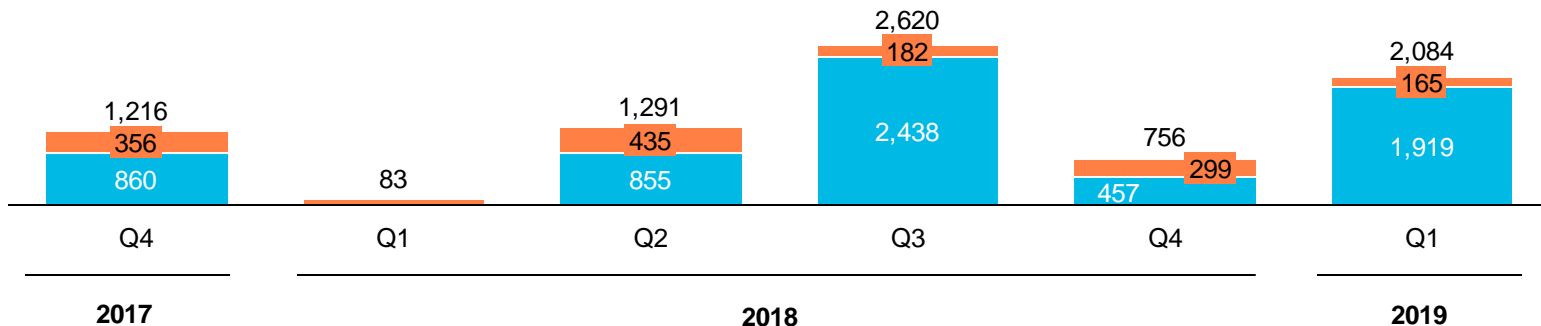
ARV Demand Outlook

2017-2019, Number of packs, thousands

Bold font – non-PPM countries Regular font – PPM countries

PEPFAR
Global Fund

- Malawi
- Tanzania
- **Zimbabwe**
- **Ethiopia**
- Zambia
- **Kenya**
- Mozambique
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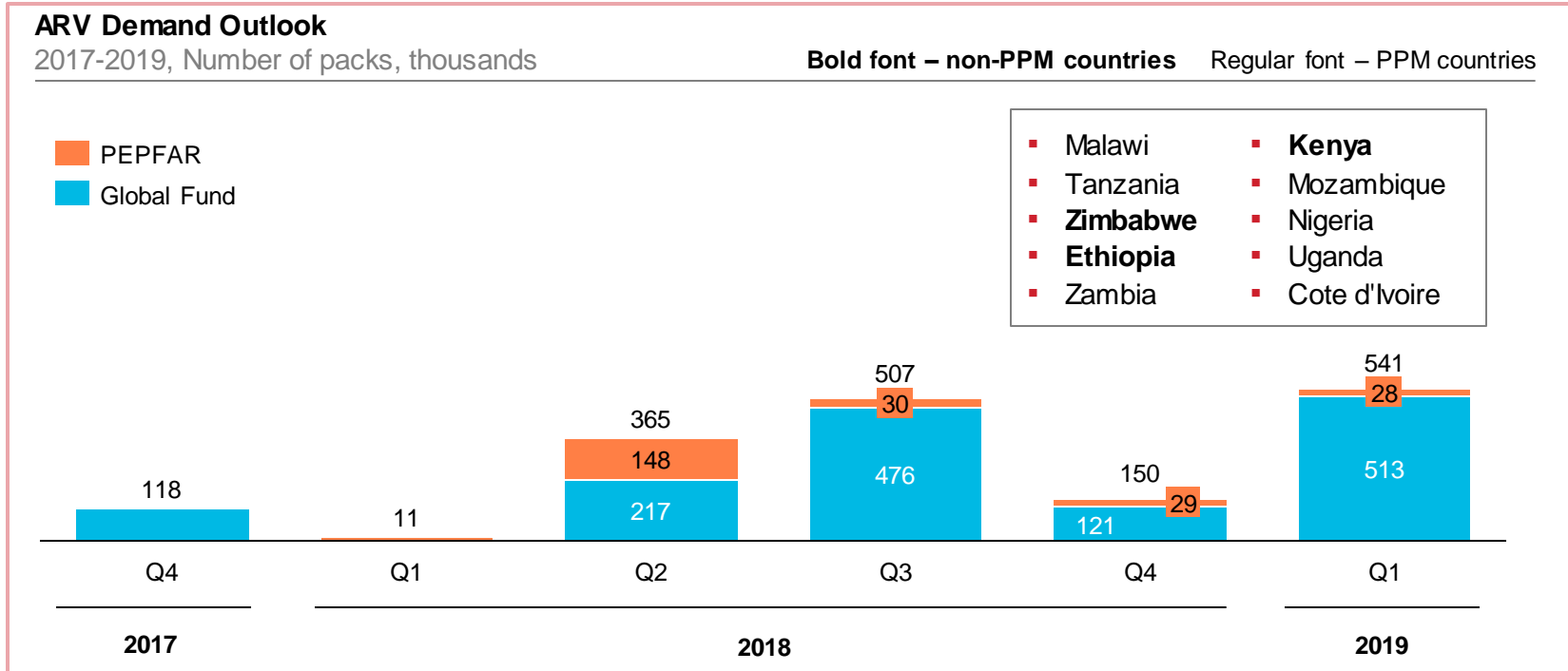


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LZN (Pediatric) – Consolidated Demand Forecast Outlook

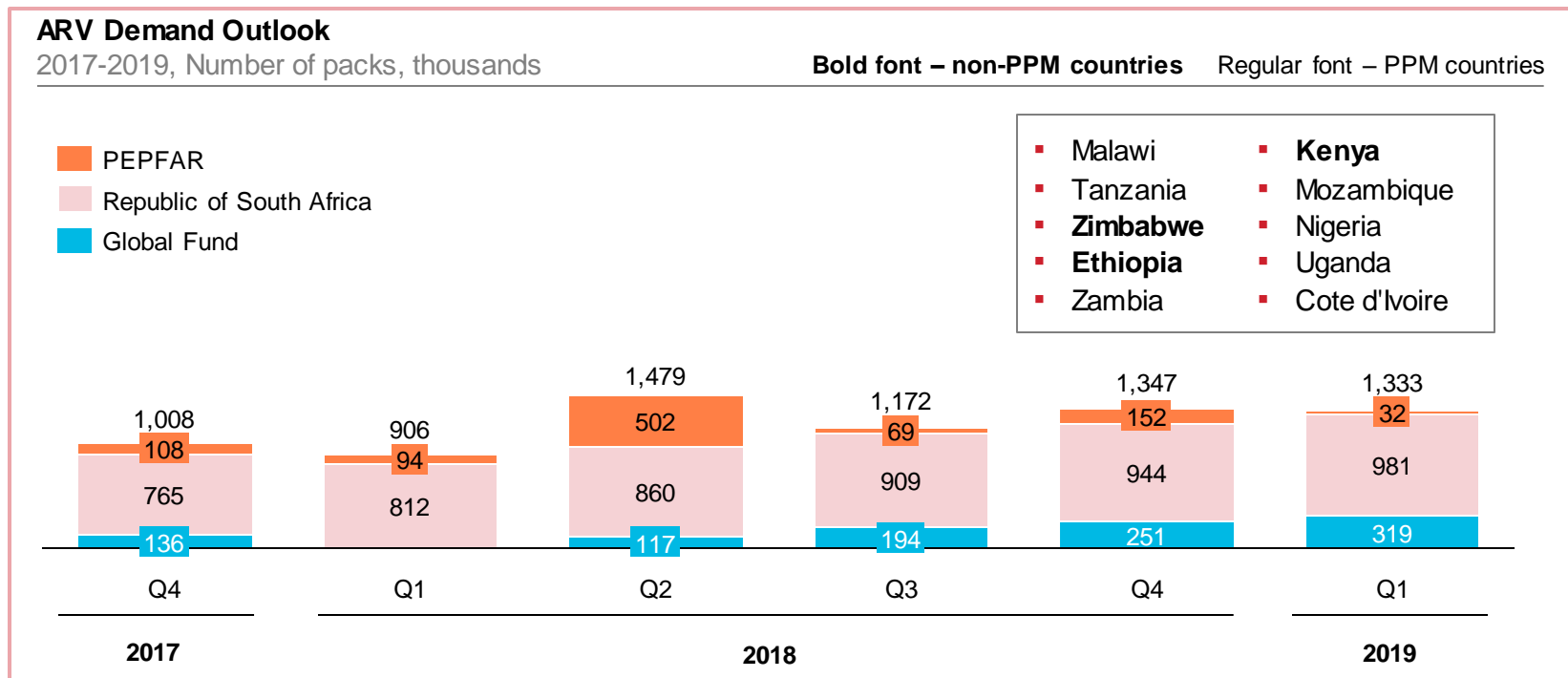


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LPV/r (adult) – Consolidated Demand Forecast Outlook

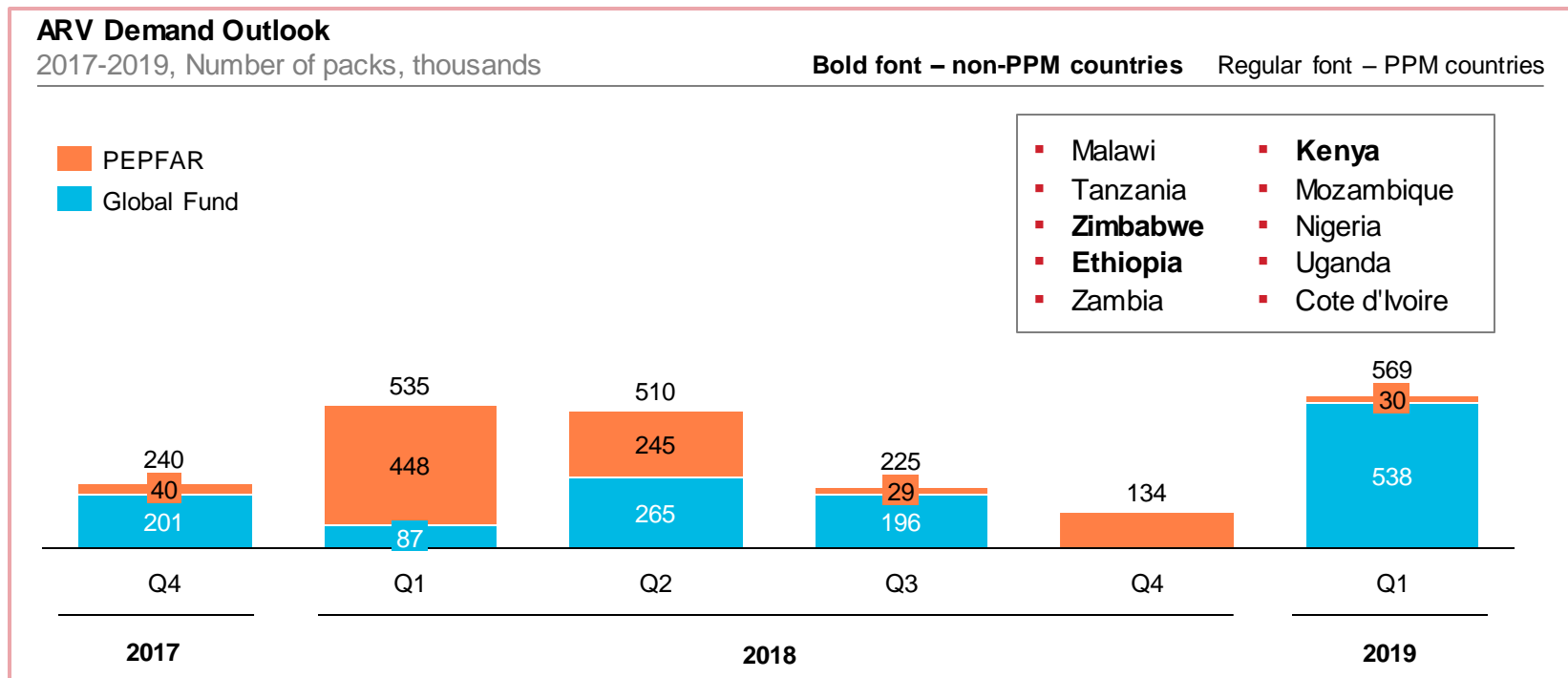


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ATV/r – Consolidated Demand Forecast Outlook

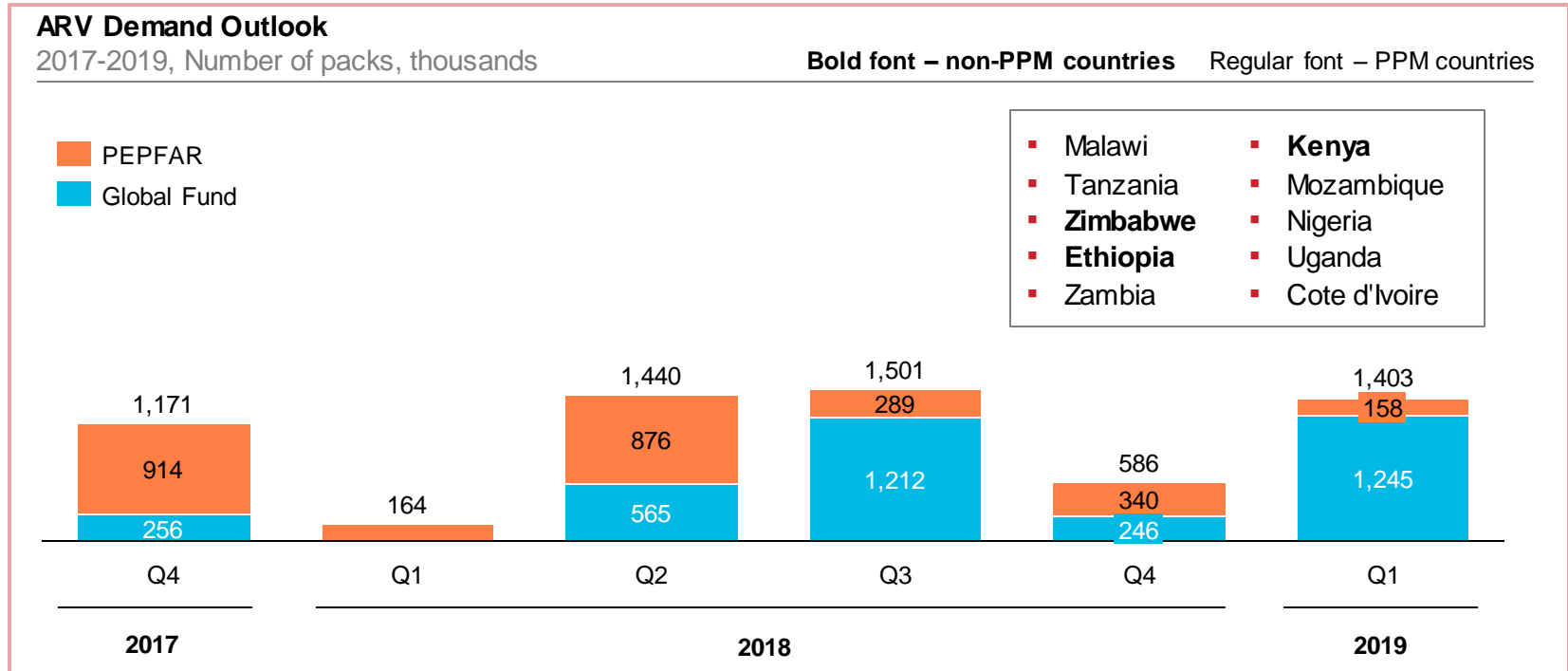


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TL – Consolidated Demand Forecast Outlook

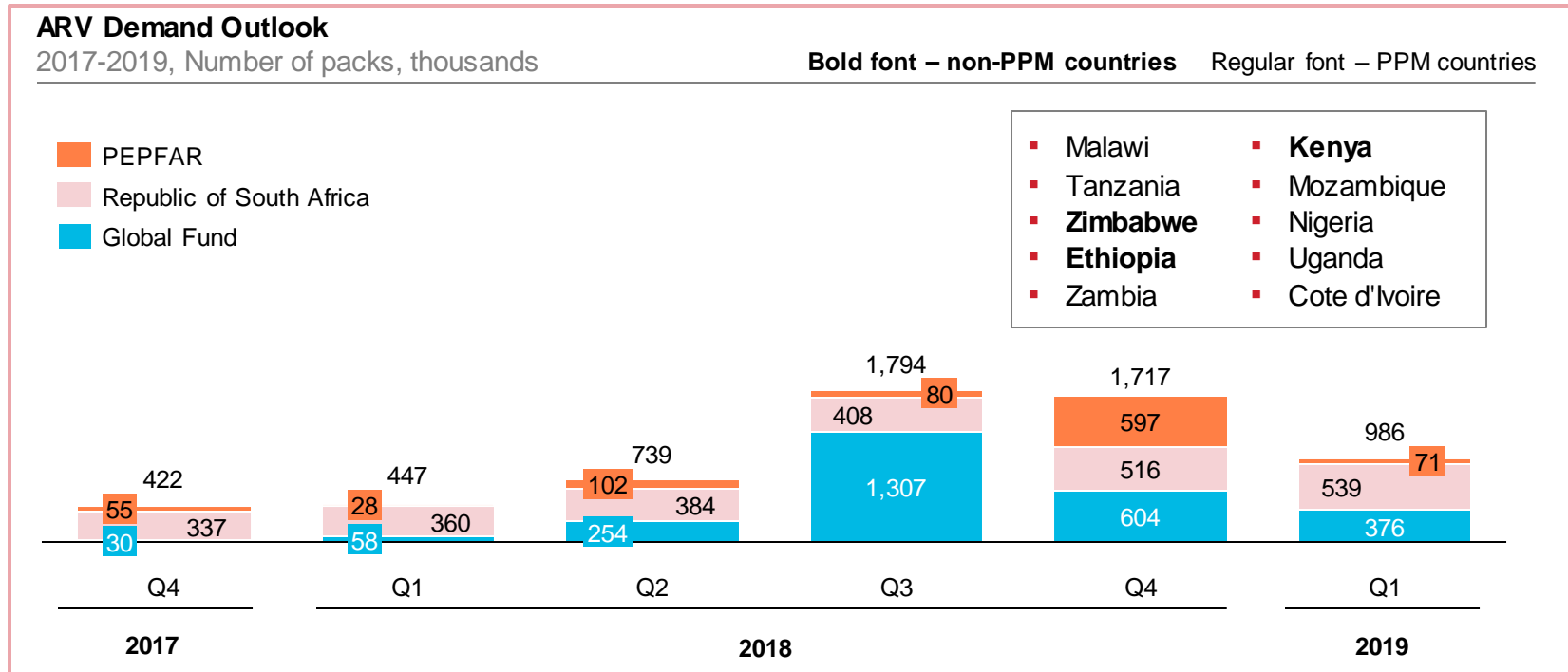


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LZ (adult) – Consolidated Demand Forecast Outlook

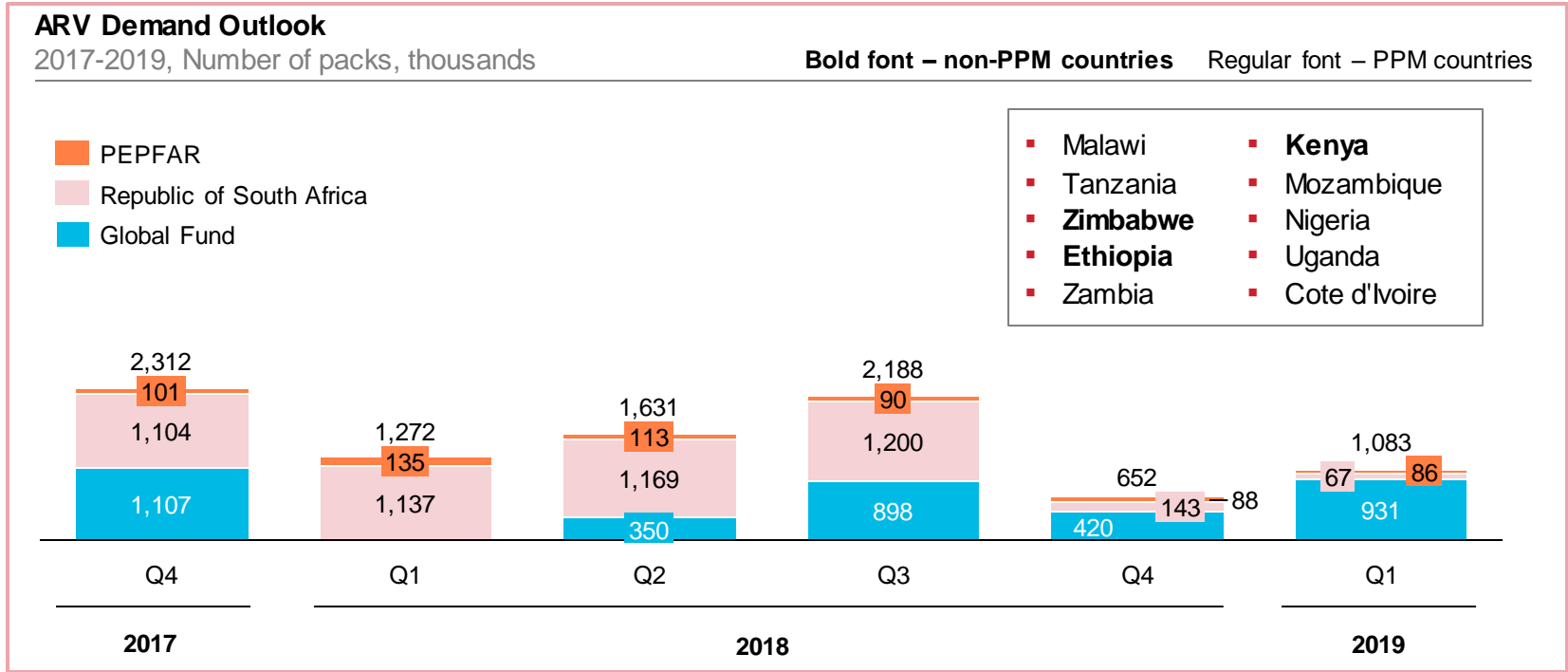


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EFV 600 – Consolidated Demand Forecast Outlook

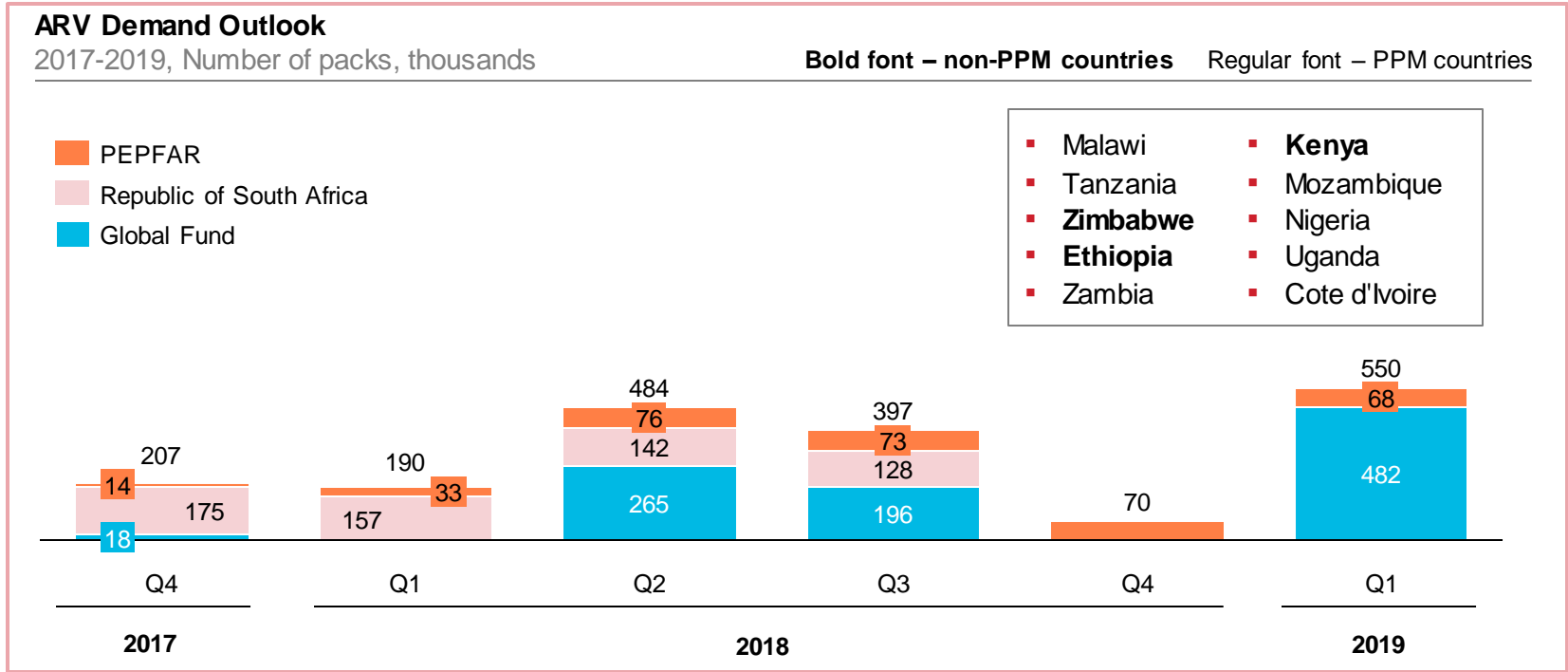


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NVP 200 – Consolidated Demand Forecast Outlook



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