

Global Fund, Kenya, PEPFAR, and Republic of South Africa 18-Month ARV Demand November, 2018 Update

Mumbai, India



Republic of South Africa

The Global Fund, PEPFAR and the governments of Kenya and 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/demand information** from across top ~9 countries procurement countries for Global Fund and PEPFAR, plus South Africa and Kenya, for top 13 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** The 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

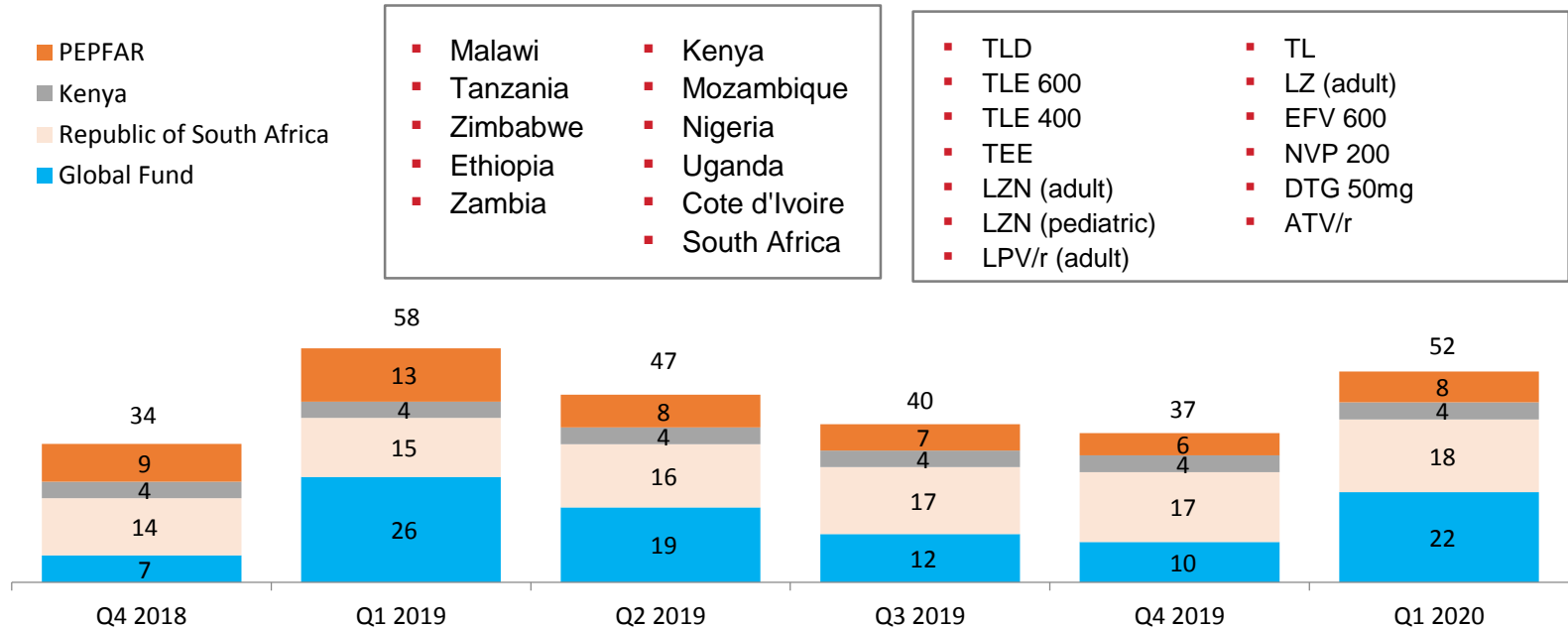
Caveats and limitations to the current version of the visibility data

- **Conservative estimates** based on currently confirmed orders
- Prepared based on **data currently available** to The Global Fund, PEPFAR, and governments of Kenya and South Africa
- **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
- **This is the fifth time this data has been collected for suppliers**

Consolidated Demand Forecast Outlook

Overall ARV Demand Outlook

Q4 2018-Q1 2020, Number of packs, million



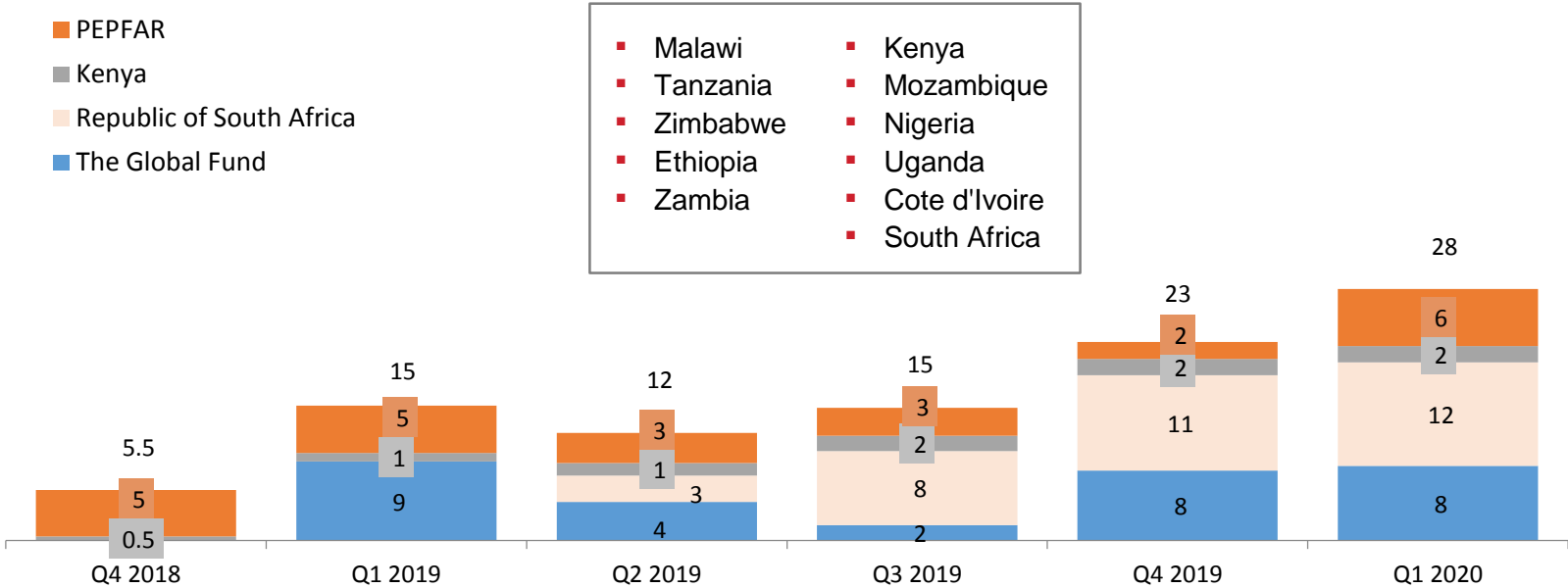
DISCLAIMER: This is an initial version of the forecast, and may contain inaccuracies. These slides contain a conservative estimate for demand management between the three programs. As such, there may be future volumes not yet financially committed or confirmed.

SOURCE: PEPFAR (USAID and CDC), Kenya, Government of South Africa, The Global Fund

TLD – Consolidated Demand Forecast Outlook

Overall ARV Demand Outlook

Q4 2018-Q1 2020, Number of packs, million



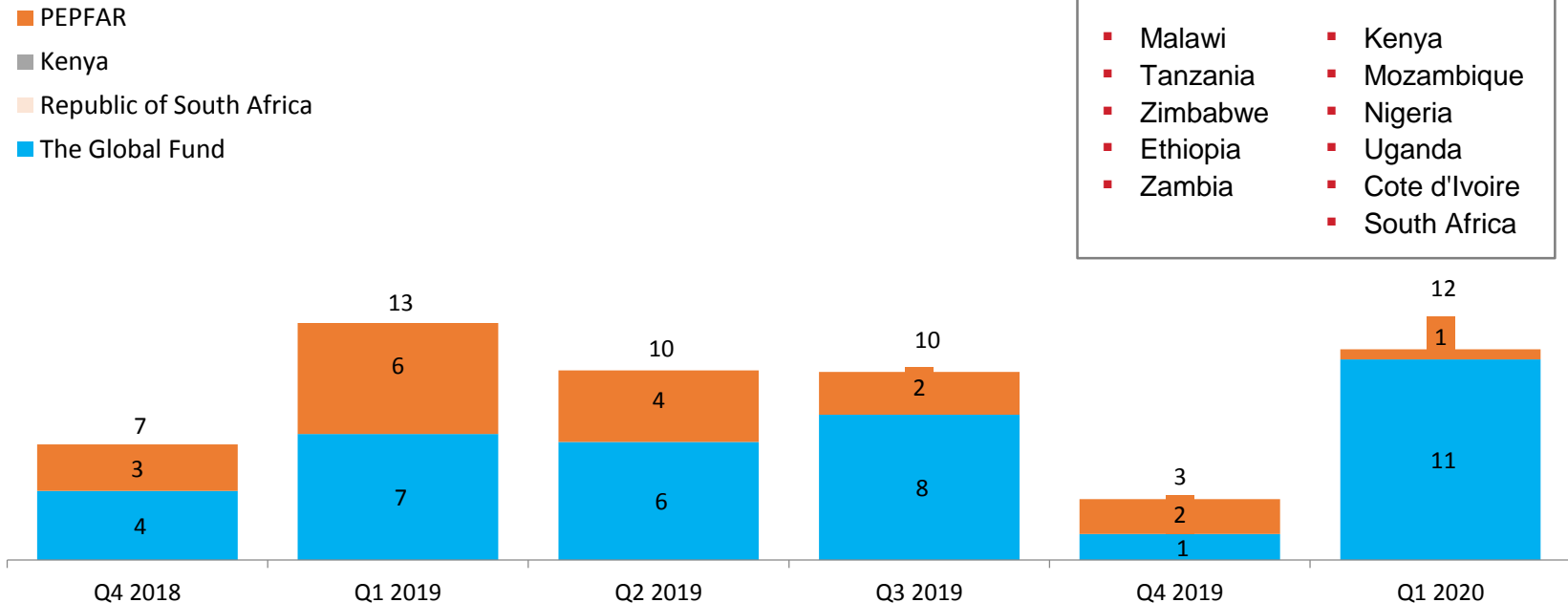
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TLE 600– Consolidated Demand Forecast Outlook

Overall ARV Demand Outlook

Q4 2018-Q1 2020, Number of packs, million



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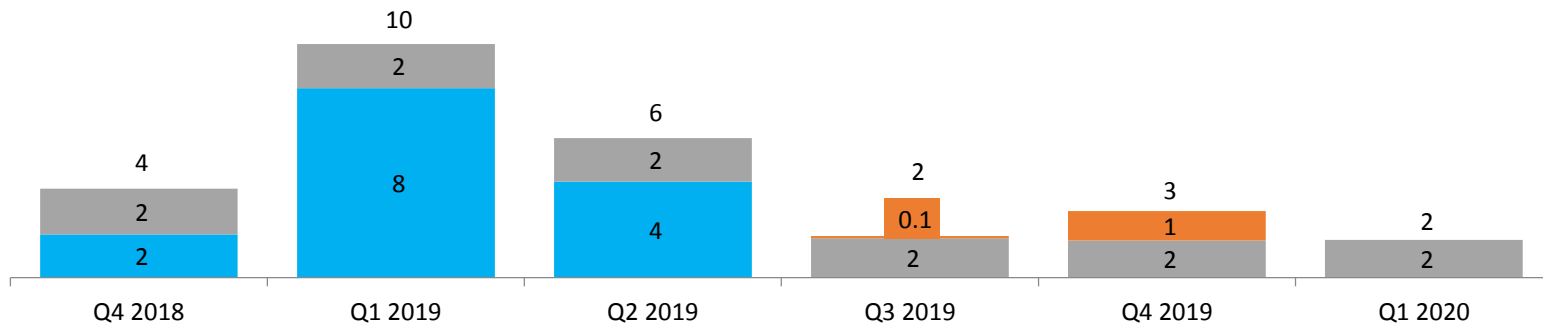
TLE 400 – Consolidated Demand Forecast Outlook

Overall ARV Demand Outlook

Q4 2018-Q1 2020, Number of packs, million

- PEPFAR
- Kenya
- Republic of South Africa
- The Global Fund

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



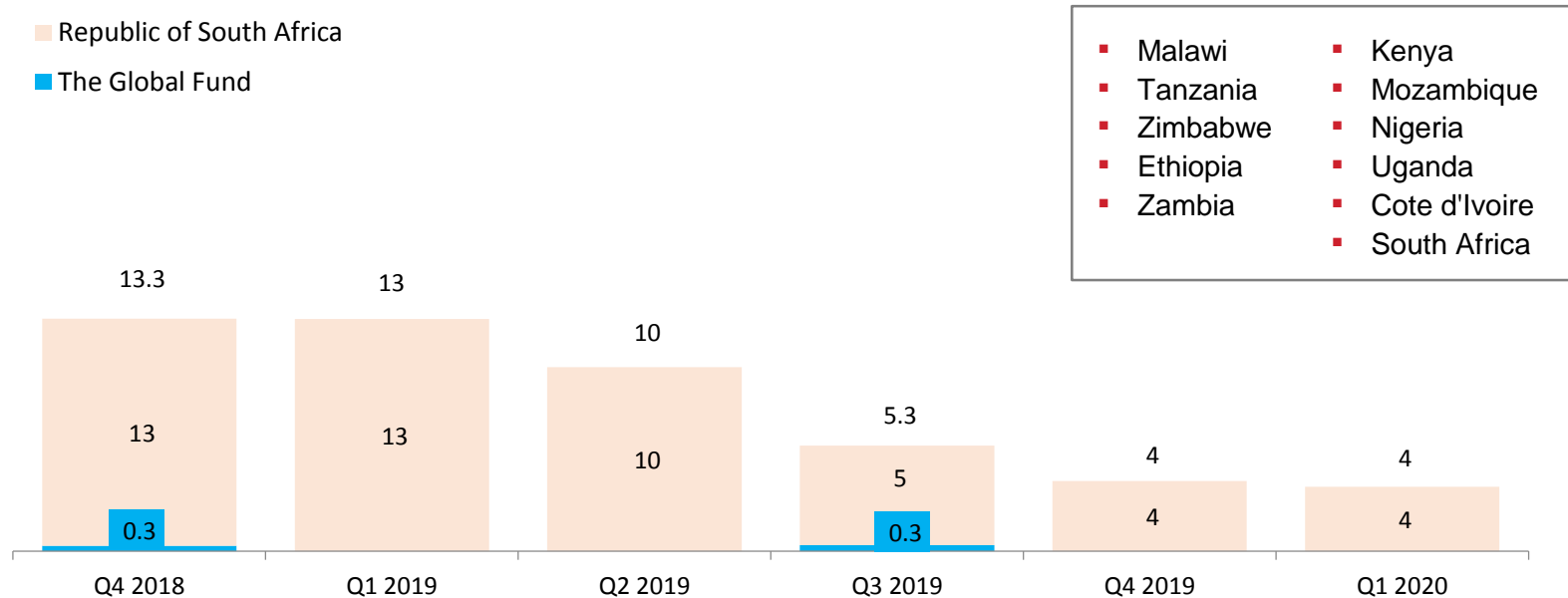
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TEE – Consolidated Demand Forecast Outlook

Overall ARV Demand Outlook

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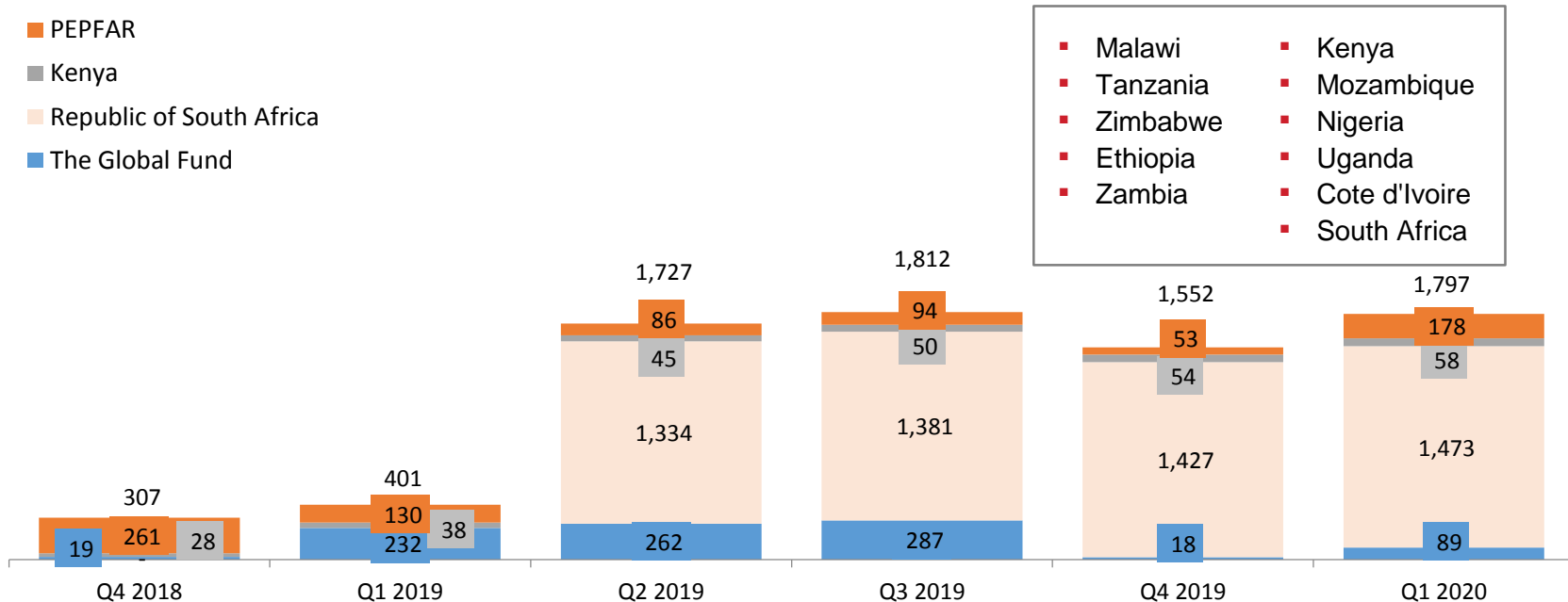
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DTG 50mg – Consolidated Demand Forecast Outlook

Overall ARV Demand Outlook

Q4 2018-Q1 2020, Number of packs, thousands



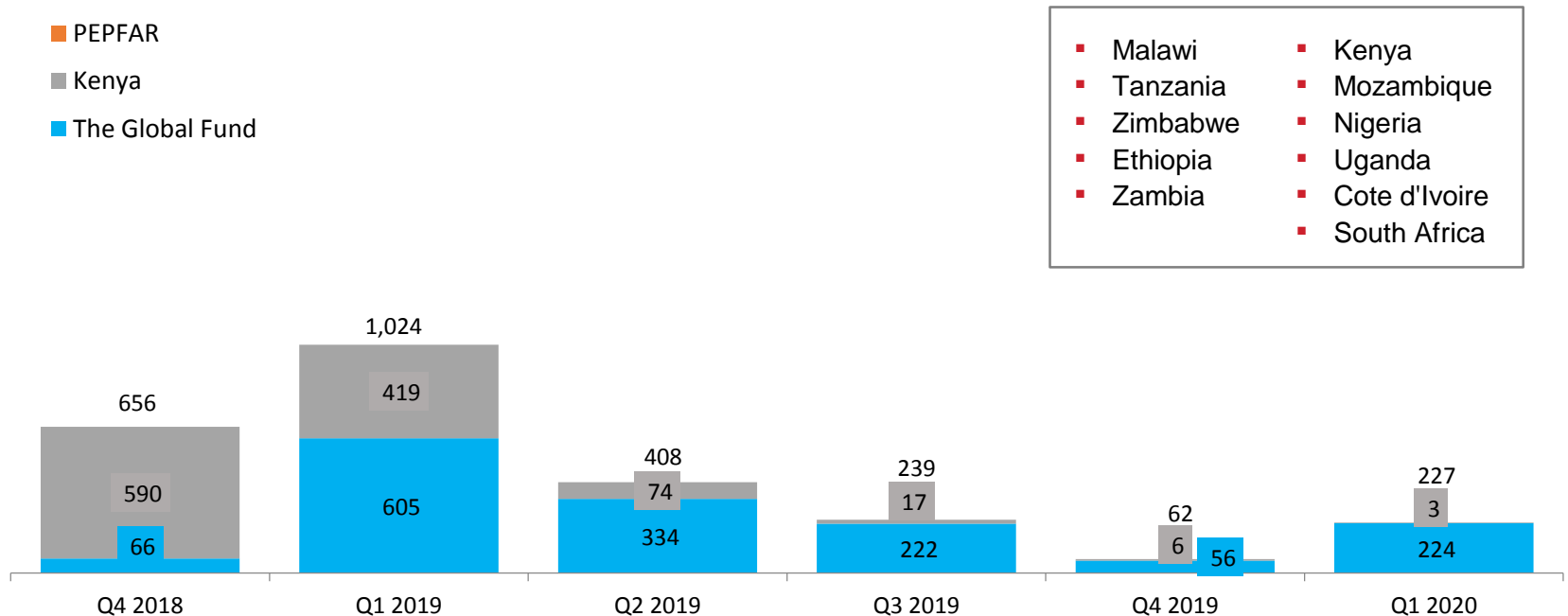
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LZN (Adult) – Consolidated Demand Forecast Outlook

Overall ARV Demand Outlook

Q4 2018-Q1 2020, Number of packs, thousands



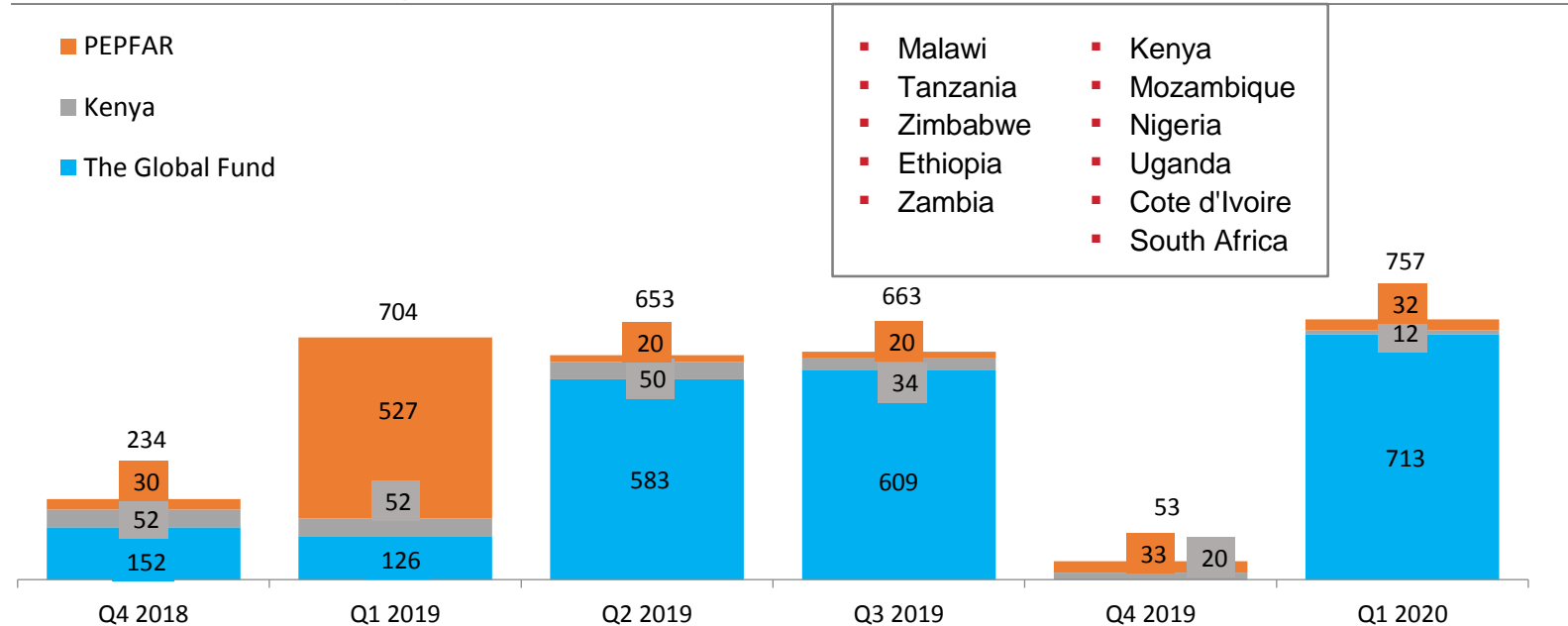
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LZN (Pediatric) – Consolidated Demand Forecast Outlook

Overall ARV Demand Outlook

Q4 2018-Q1 2020, Number of packs, thousands

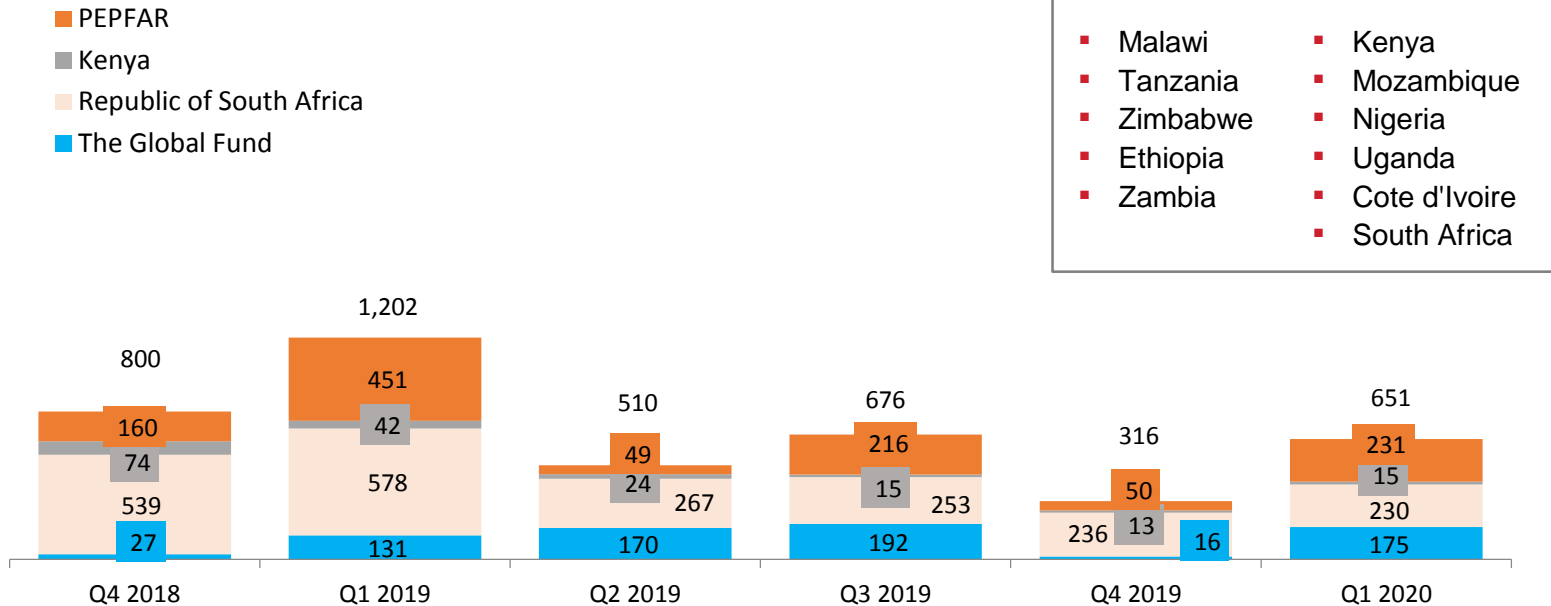


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LPV/r (adult) – Consolidated Demand Forecast Outlook

Overall ARV Demand Outlook

Q4 2018-Q1 2020, Number of packs, thousands

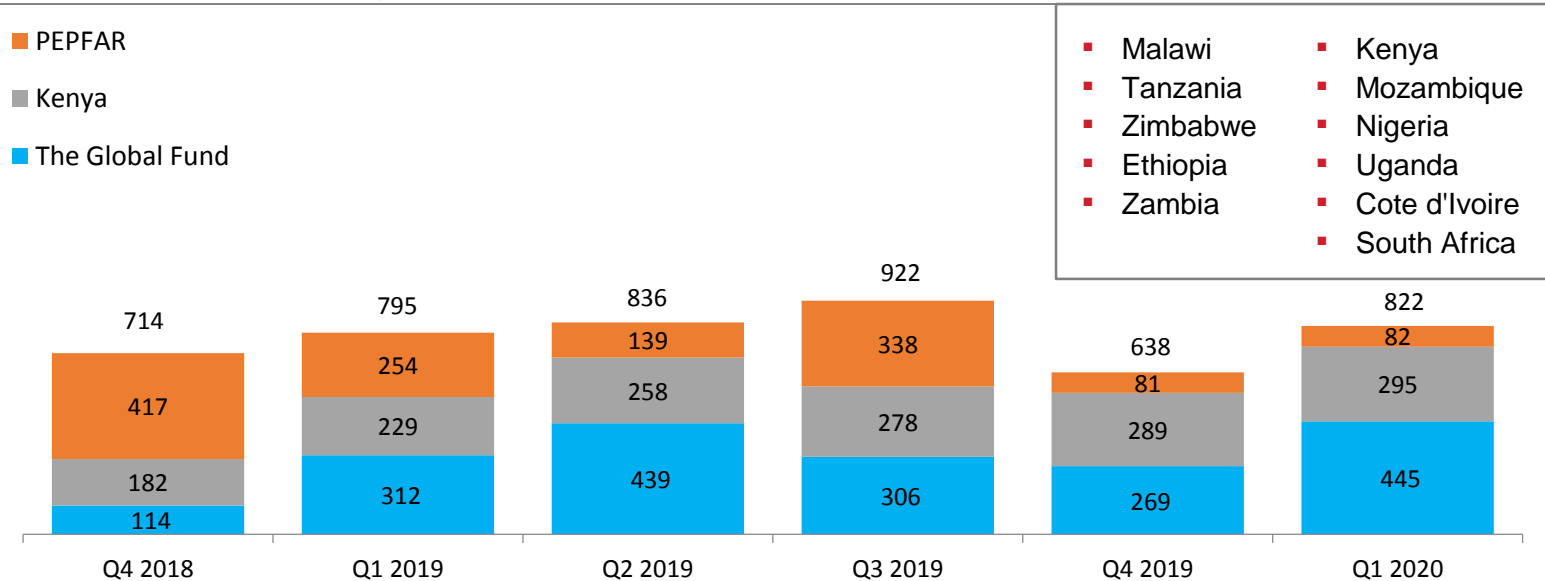


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ATV/r – Consolidated Demand Forecast Outlook

Overall ARV Demand Outlook

Q4 2018-Q1 2020, Number of packs, thousands

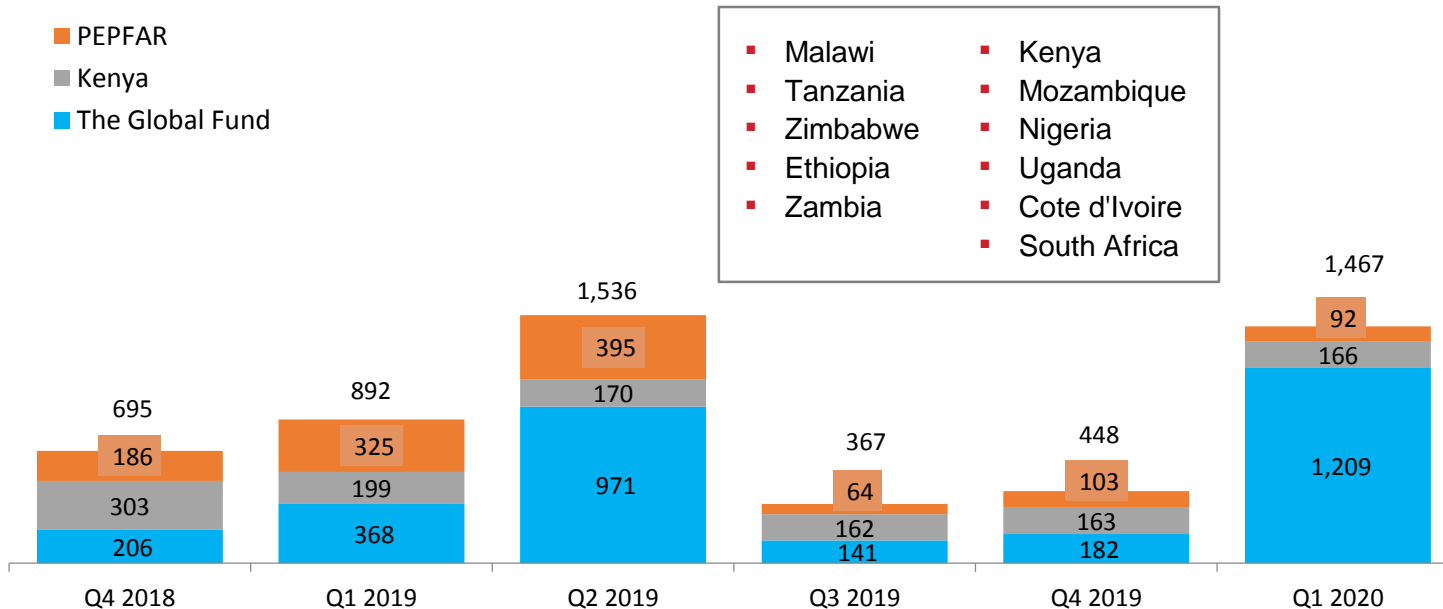


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TL – Consolidated Demand Forecast Outlook

Overall ARV Demand Outlook

Q4 2018-Q1 2020, Number of packs, thousands

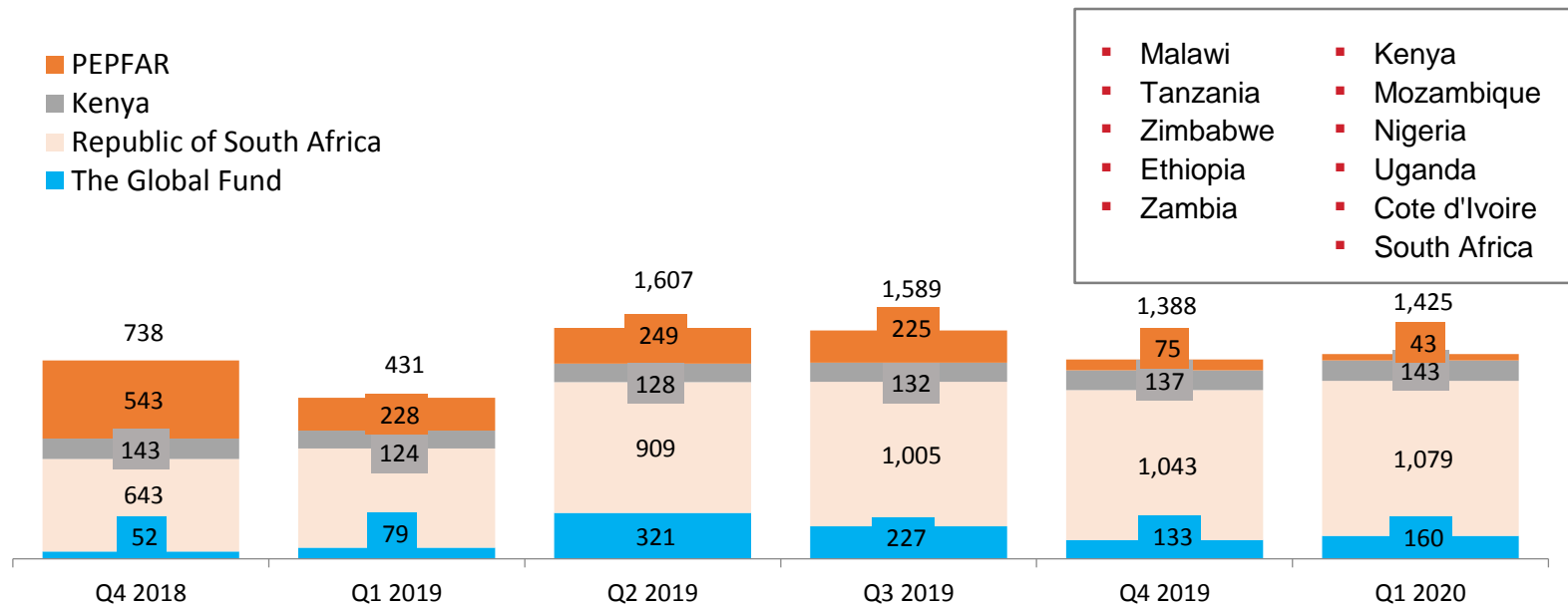


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LZ (adult) – Consolidated Demand Forecast Outlook

Overall ARV Demand Outlook

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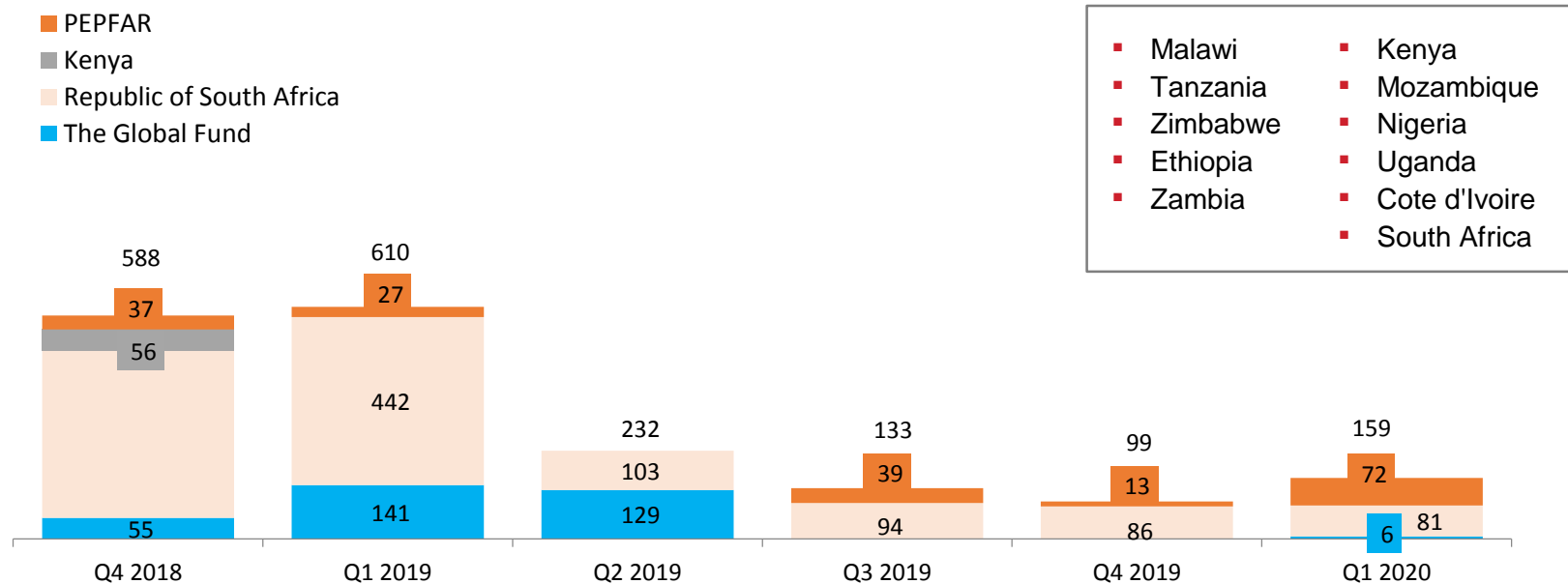


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EFV 600 – Consolidated Demand Forecast Outlook

Overall ARV Demand Outlook

Q4 2018-Q1 2020, Number of packs, thousands

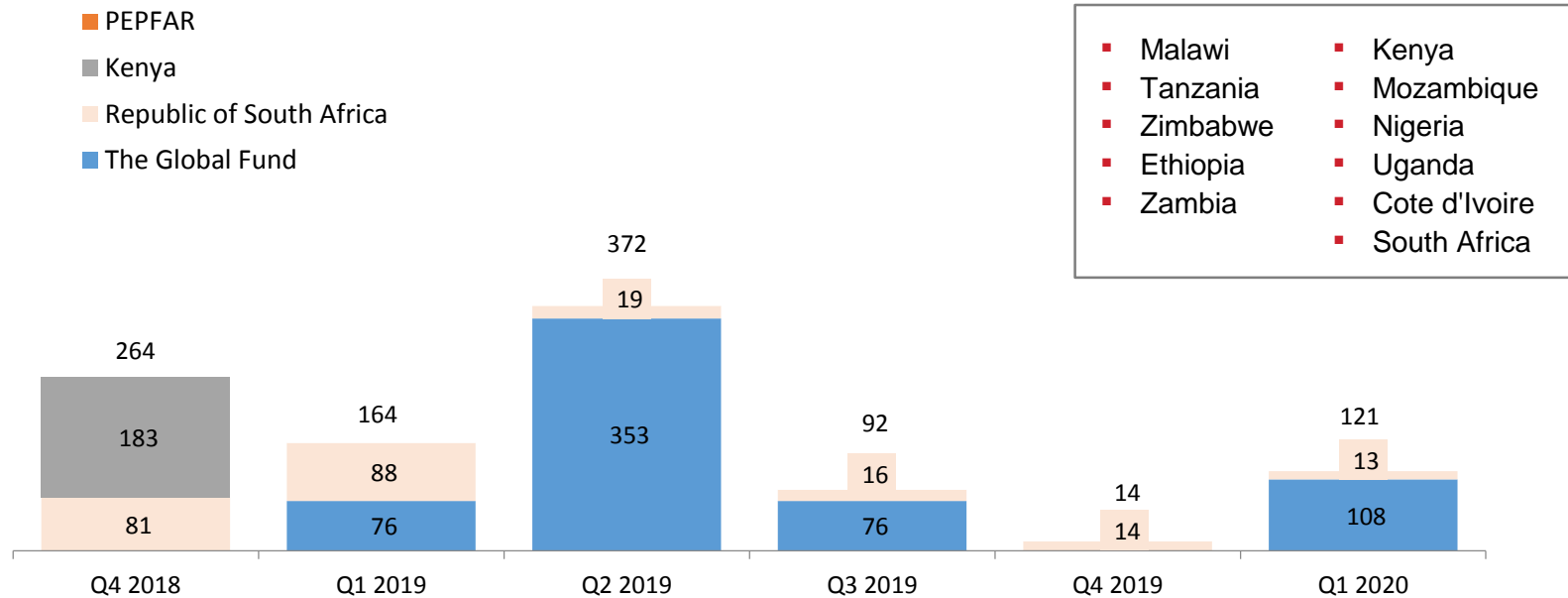


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NVP 200 – Consolidated Demand Forecast Outlook

Overall ARV Demand Outlook

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