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

Mumbai, India
The Global Fund, PEPFAR and the governments of Kenya and South Africa are working together to improve the consolidated demand outlook.

<table>
<thead>
<tr>
<th>What we will do</th>
<th>What we will not do together</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Coordinated approach</strong> and messages</td>
<td><strong>Long-term agreements</strong> with manufacturers</td>
</tr>
<tr>
<td><strong>Synergistic</strong> strategies</td>
<td><strong>Selection of suppliers</strong> and demand allocation</td>
</tr>
<tr>
<td><strong>Direct engagement</strong> with suppliers &amp; supplier visits (sometimes)</td>
<td><strong>Execution of purchase orders</strong></td>
</tr>
<tr>
<td>Align on <strong>key supplier performance metrics</strong></td>
<td>We will not manage actual <strong>supplier performance jointly</strong></td>
</tr>
<tr>
<td><strong>Sharing of</strong> synthesized market intelligence and general supplier performance</td>
<td>Managing <strong>overall supplier performance</strong> (Price, lead-time, delivery etc.)</td>
</tr>
<tr>
<td><strong>Sharing information</strong> (without providing confidential / sensitive information)</td>
<td></td>
</tr>
<tr>
<td>Providing <strong>improved demand visibility</strong></td>
<td></td>
</tr>
</tbody>
</table>
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**

<table>
<thead>
<tr>
<th>Country/itures</th>
<th>Q4 2018</th>
<th>Q1 2019</th>
<th>Q2 2019</th>
<th>Q3 2019</th>
<th>Q4 2019</th>
<th>Q1 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Malawi</td>
<td>13</td>
<td>13</td>
<td>13</td>
<td>13</td>
<td>13</td>
<td>13</td>
</tr>
<tr>
<td>Tanzania</td>
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<td>4</td>
<td>4</td>
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<tr>
<td>Zimbabwe</td>
<td>15</td>
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<td>Ethiopia</td>
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<td>Kenya</td>
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<tr>
<td>Mozambique</td>
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<td>9</td>
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<td>Nigeria</td>
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<td>4</td>
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<tr>
<td>Uganda</td>
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<td>14</td>
<td>10</td>
<td>10</td>
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<td>10</td>
</tr>
<tr>
<td>Cote d'Ivoire</td>
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<td>22</td>
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<td>South Africa</td>
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<tr>
<td>Kenya</td>
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<td>4</td>
<td>7</td>
<td>7</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>Republic of South Africa</td>
<td>15</td>
<td>15</td>
<td>16</td>
<td>16</td>
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<tr>
<td>Global Fund</td>
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<td>19</td>
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</tbody>
</table>

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

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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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TLE 600– Consolidated Demand Forecast Outlook

Overall ARV Demand Outlook
Q4 2018-Q1 2020, Number of packs, million

<table>
<thead>
<tr>
<th></th>
<th>Q4 2018</th>
<th>Q1 2019</th>
<th>Q2 2019</th>
<th>Q3 2019</th>
<th>Q4 2019</th>
<th>Q1 2020</th>
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<tbody>
<tr>
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<td>6</td>
<td>2</td>
<td>3</td>
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<tr>
<td>Kenya</td>
<td>7</td>
<td>6</td>
<td>10</td>
<td>10</td>
<td>3</td>
<td>11</td>
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<tr>
<td>South Africa</td>
<td>4</td>
<td>6</td>
<td>8</td>
<td>2</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>The Global Fund</td>
<td>13</td>
<td>7</td>
<td>10</td>
<td>12</td>
<td>11</td>
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</tbody>
</table>

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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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Overall ARV Demand Outlook
Q4 2018-Q1 2020, Number of packs, million

- Republic of South Africa
- The Global Fund

Q4 2018: 13
Q1 2019: 13
Q2 2019: 10
Q3 2019: 5
Q4 2019: 4
Q1 2020: 4

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

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DTG 50mg – Consolidated Demand Forecast Outlook

Overall ARV Demand Outlook
Q4 2018-Q1 2020, Number of packs, thousands

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

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

Q4 2018
Q1 2019
Q2 2019
Q3 2019
Q4 2019
Q1 2020

19
261
28
86
45
1,727
1,334
401
130
232
38
1,812
1,381
1,552
53
54
1,797
1,427
1,473
18
89

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WORK IN PROGRESS

LZN (Adult) – Consolidated Demand Forecast Outlook

Overall ARV Demand Outlook
Q4 2018-Q1 2020, Number of packs, thousands

- PEPFAR
- Kenya
- The Global Fund

<table>
<thead>
<tr>
<th></th>
<th>Q4 2018</th>
<th>Q1 2019</th>
<th>Q2 2019</th>
<th>Q3 2019</th>
<th>Q4 2019</th>
<th>Q1 2020</th>
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<tbody>
<tr>
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<tr>
<td>Kenya</td>
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<td>419</td>
<td>334</td>
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<tr>
<td>The Global Fund</td>
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<td>66</td>
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### Overall ARV Demand Outlook

**Q4 2018-Q1 2020, Number of packs, thousands**

<table>
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<tr>
<th>Country/Program</th>
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<th>Q1 2019</th>
<th>Q2 2019</th>
<th>Q3 2019</th>
<th>Q4 2019</th>
<th>Q1 2020</th>
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<td>663</td>
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<tr>
<td>Zimbabwe</td>
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<td>Ethiopia</td>
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<tr>
<td>Zambia</td>
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<tr>
<td>Kenya</td>
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<tr>
<td>Mozambique</td>
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<tr>
<td>Nigeria</td>
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<td>Uganda</td>
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<tr>
<td>Cote d’Ivoire</td>
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<tr>
<td>South Africa</td>
<td></td>
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**SOURCE:** PEPFAR (USAID and CDC), Kenya, Government of South Africa, The Global Fund
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

<table>
<thead>
<tr>
<th>Program</th>
<th>Q4 2018</th>
<th>Q1 2019</th>
<th>Q2 2019</th>
<th>Q3 2019</th>
<th>Q4 2019</th>
<th>Q1 2020</th>
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<tbody>
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</table>

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**WORK IN PROGRESS**
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
Q4 2018-Q1 2020, Number of packs, thousands

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EFV 600 – Consolidated Demand Forecast Outlook

Overall ARV Demand Outlook
Q4 2018-Q1 2020, Number of packs, thousands

<table>
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<tr>
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<th>Q2 2019</th>
<th>Q3 2019</th>
<th>Q4 2019</th>
<th>Q1 2020</th>
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<tr>
<td>PEPFAR</td>
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<td>103</td>
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<td>610</td>
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NVP 200 – Consolidated Demand Forecast Outlook

Overall ARV Demand Outlook
Q4 2018-Q1 2020, Number of packs, thousands

![Chart showing demand forecast for various regions from Q4 2018 to Q1 2020]

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