Large buyer Coordinated demand visibility update

July, 2019
AMDS Meeting
Geneva, Switzerland
Global Fund, PEPFAR, Governments of South Africa and Kenya 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.)
Increased dialogue between buyers & sellers over the past 5 years

- All updated 18 month forecasts are posted @ https://www.theglobalfund.org/en/sourcing-management/health-products/antiretrovirals/
- Looking at larger issues to increase efficiency (packing, data visibility, dialogues on current concerns and appreciated actions)
- A number of procurement channels considering performance metrics, Framework contracts and moving away from frequent spot tenders
- Big funders/buyers committed to further strengthen partnership and improve on demand management
ARV Transitions are Occurring at a Rapid Rate

- Noted that the past transitions have taken 4 to 5 years to be completed, whereas current ARV transitions are expected to be completed much faster
- This has led to shorter production life cycles for ARVs, down to 3 years and less in some cases.

Accuracy and Demand Visibility

- Agreement to share more analysis on forecast accuracy
- Looking to share more firm demand for new ARVs that are required for optimization efforts
- Interest in sharing more data to show the decrease or “phase-out” of legacy ARVs that are being replaced

Interest in Ensuring Decreasing Shelf-Life Requirements for Importation

- Participants agreed that efforts are needed to reduce shelf-life requirements for the importation of ARVs
- This will increase supply chain efficiency and flexibility; and regularity of deliveries
- Further, this could help incentivize countries to ensure lean and efficient in-country supply chains, and reduce high buffer stock levels, which may limit ARV transition efforts

The 2019 ARV and Buyers and Sellers Forum will occur in mid-November.
The Forum will be hosted by PEPFAR in the United States
Global Fund, PEPFAR, Kenya ARV Demand Management
July, 2019 Update

July, 2019
Geneva, Switzerland
Consolidated demand forecast is derived in 5 simple steps

1. **Gather order information** from across high volume countries for high volume 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, Kenya, and 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 and demand
- Prepared based on **data currently available** to The Global Fund, Kenya, PEPFAR, 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
- **Seventh joint consolidated procurement** forecast
## Consolidated Total ARV Demand Forecast Outlook

### Overall ARV Demand Outlook
Q3 2019-Q4 2020, Number of packs, million

<table>
<thead>
<tr>
<th>Country</th>
<th>Q3 2019</th>
<th>Q4 2019</th>
<th>Q1 2020</th>
<th>Q2 2020</th>
<th>Q3 2020</th>
<th>Q4 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Malawi</td>
<td>36</td>
<td>47</td>
<td>37</td>
<td>46</td>
<td>43</td>
<td>28</td>
</tr>
<tr>
<td>South Africa</td>
<td>11</td>
<td>13</td>
<td>14</td>
<td>12</td>
<td>20</td>
<td>22</td>
</tr>
<tr>
<td>Tanzania</td>
<td>17</td>
<td>19</td>
<td>20</td>
<td>21</td>
<td>21</td>
<td>5</td>
</tr>
<tr>
<td>Zimbabwe</td>
<td>8</td>
<td>3</td>
<td>9</td>
<td>11</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>7</td>
<td>20</td>
<td>21</td>
<td>21</td>
<td>20</td>
<td>5</td>
</tr>
<tr>
<td>Zambia</td>
<td>5</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

**Bold font – non-PPM countries**
- TLE 600
- TLE 400 30 tabs
- TLE 400 90 tabs
- TLD 30 tabs
- TLD 90 tabs
- TLD 180 tabs
- LZN (pediatric)
- LPV/r 200/50
- LPV/r 40/10 granules
- LPV/r 40/10 pellets

**Regular font – PPM countries**
- 3TC/AZT 150/300
- LPV/r 100/25
- ATV/r 300/100
- TDF/3TC 300/300
- EFV 600
- DTG 50
- ABC/3TC 600/300
- ABC/3TC 120/60
- TEE

**Legend**
- PEPFAR
- Kenya
- Republic of South Africa
- Global Fund

**DISCLAIMER:** This is an initial version of the forecast, and may contain inaccuracies – please refer to caveats and data limitations on page 10. 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, Government of Kenya, The Global Fund, South Africa
Based on current demand visibility information from Global Fund, PEPFAR, Kenya, South Africa. Dates refers to in-country delivery date and contains both actual and planned orders; not based on full reporting from all countries.

*Packs of 90 are converted to packs of 30 for consistency purposes.

### Countries Procuring TLD

<table>
<thead>
<tr>
<th>Armenia</th>
<th>Malawi</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benin</td>
<td>Mongolia</td>
</tr>
<tr>
<td>Botswana</td>
<td>Mozambique</td>
</tr>
<tr>
<td>Burkina Faso</td>
<td>Namibia</td>
</tr>
<tr>
<td>Burundi</td>
<td>Nigeria</td>
</tr>
<tr>
<td>Cameroon</td>
<td>Pakistan</td>
</tr>
<tr>
<td>Central African Republic</td>
<td>Papua New Guinea</td>
</tr>
<tr>
<td>Congo DRC</td>
<td>Rwanda</td>
</tr>
<tr>
<td>Cote d'Ivoire</td>
<td>Senegal</td>
</tr>
<tr>
<td>eSwatini</td>
<td>South Africa</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>Tanzania</td>
</tr>
<tr>
<td>Ghana</td>
<td>Uganda</td>
</tr>
<tr>
<td>Guatemala</td>
<td>Ukraine</td>
</tr>
<tr>
<td>Haiti</td>
<td>Vietnam</td>
</tr>
<tr>
<td>Kenya</td>
<td>Yemen</td>
</tr>
<tr>
<td>Laos</td>
<td>Zambia</td>
</tr>
<tr>
<td>Lesotho</td>
<td>Zimbabwe</td>
</tr>
<tr>
<td>Madagascar</td>
<td></td>
</tr>
</tbody>
</table>
Comparison of TLD Demand as % of Total ARV Volume for 18 Month Demand
(Global Fund, Kenya, and PEPFAR only)

**Q4, 2018-Q1,2020**
- TLD: 39%
- All Other Adult ARVs: 61%

**Q3,2019-Q4,2020**
- TLD: 46%
- All Other ARVs: 54%

Increased Total TLD Volume by 75%

**November, 2018 4th Annual Buyers/Sellers Forum**

**July, 2019 Joint WHO/UNAIDS Annual Consultation**

For TLD calculations for July, 2019, we combined the volume for TLD 30 tabs, TLD 90 tabs, and TLD 180 tabs. To make the TLD 90 tabs volume equivalent to TLD 30 tabs volume, we multiplied the TLD 90 volume by 3. To make the TLD 180 tabs volume equivalent to TLD 30 tabs volume, we multiplied the TLD 180 volume by 6.

For TLE 400 calculations for July, 2019 (part of the “All Other Adult ARVs”), we combined the volume of TLE 400 30 tabs with TLE 400 90 tabs. To make the TLE400 90 tabs equivalent to the TLE 400 30 tabs, we multiplied the volume of TLE 400 90 tabs by 3.

TLD 30 Tabs– Consolidated Demand Forecast Outlook

Overall ARV Demand Outlook
Q3 2019-Q4 2020, Number of packs, millions

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

**Bold font – non-PPM countries**
- Malawi
- South Africa
- Tanzania
- Zimbabwe
- Ethiopia
- Zambia

**Regular font – PPM countries**
- Kenya
- Mozambique
- Nigeria
- Uganda
- Cote d’Ivoire

DISCLAIMER: This is an initial version of the forecast, and may contain inaccuracies – please refer to caveats and data limitations on page 10. 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.

**TLD 90 Tabs—Consolidated Demand Forecast Outlook**

**Overall ARV Demand Outlook**  
Q3 2019-Q4 2020, Number of packs, millions

<table>
<thead>
<tr>
<th></th>
<th>Q3 2019</th>
<th>Q4 2019</th>
<th>Q1 2020</th>
<th>Q2 2020</th>
<th>Q3 2020</th>
<th>Q4 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PEPFAR</strong></td>
<td>0.5</td>
<td>0.8</td>
<td>0.7</td>
<td>0.7</td>
<td>0.7</td>
<td>0.7</td>
</tr>
<tr>
<td><strong>Kenya</strong></td>
<td>0.5</td>
<td>2.5</td>
<td>0.9</td>
<td>0.5</td>
<td>0.2</td>
<td>0.2</td>
</tr>
<tr>
<td><strong>The Global Fund</strong></td>
<td>3.3</td>
<td>1.6</td>
<td>2.0</td>
<td>0.8</td>
<td>0.9</td>
<td>0.9</td>
</tr>
</tbody>
</table>

**Bold font – non-PPM countries**  
- Malawi
- South Africa
- Tanzania
- **Zimbabwe**
- Ethiopia
- Zambia

**Regular font – PPM countries**  
- Kenya
- Mozambique
- Nigeria
- Uganda
- Cote d'Ivoire

**DISCLAIMER:** This is an initial version of the forecast, and may contain inaccuracies—please refer to caveats and data limitations on page 10. 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.

TLD 180 Tabs– Consolidated Demand Forecast Outlook

Overall ARV Demand Outlook
Q3 2019-Q4 2020, Number of packs, thousands

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

**Bold font – non-PPM countries**

**Regular font – PPM countries**

DISCLAIMER: This is an initial version of the forecast, and may contain inaccuracies – please refer to caveats and data limitations on page 10. 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.

TLD Pack Size Comparison by Patient Months

Comparison of TLD Pack Size by Patient Months of Treatment

<table>
<thead>
<tr>
<th>TLD Pack Size</th>
<th>Q3 2019</th>
<th>Q4 2019</th>
<th>Q1 2020</th>
<th>Q2 2020</th>
<th>Q3 2020</th>
<th>Q4 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>TLD 30 tabs</td>
<td>7,151,426</td>
<td>10,042,704</td>
<td>14,467,167</td>
<td>16,064,293</td>
<td>22,315,062</td>
<td>14,135,609</td>
</tr>
<tr>
<td>TLD 90 tabs</td>
<td>1,454,685</td>
<td>9,998,055</td>
<td>4,918,345</td>
<td>6,005,205</td>
<td>2,748,349</td>
<td>2,611,794</td>
</tr>
<tr>
<td>TLD 180 tabs</td>
<td>-</td>
<td>382,740</td>
<td>91,296</td>
<td>288,240</td>
<td>327,186</td>
<td>323,028</td>
</tr>
</tbody>
</table>

DISCLAIMER: This is an initial version of the forecast, and may contain inaccuracies – please refer to caveats and data limitations on page 10. 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.

Overall ARV Demand Outlook
Q3 2019-Q4 2020, Number of packs, millions

**Bold font – non-PPM countries**
- Malawi
- South Africa
- Tanzania
- Zimbabwe
- Ethiopia
- Zambia

**Regular font – PPM countries**
- Kenya
- Mozambique
- Nigeria
- Uganda
- Cote d'Ivoire

---

**DISCLAIMER:** This is an initial version of the forecast, and may contain inaccuracies – please refer to caveats and data limitations on page 10. 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, Government of Kenya, The Global Fund, South Africa
### Overall ARV Demand Outlook

**Q3 2019-Q4 2020, Number of packs, million**

<table>
<thead>
<tr>
<th>Country</th>
<th>Q3 2019</th>
<th>Q4 2019</th>
<th>Q1 2020</th>
<th>Q2 2020</th>
<th>Q3 2020</th>
<th>Q4 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Malawi</td>
<td>4</td>
<td>4</td>
<td>2</td>
<td>3</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>South Africa</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tanzania</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Zimbabwe</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ethiopia</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Zambia</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Kenya</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mozambique</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nigeria</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Uganda</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cote d'Ivoire</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Bold font – non-PPM countries**

**Regular font – PPM countries**

**Source:** PEPFAR, Government of Kenya, The Global Fund, South Africa

**Disclaimer:** This is an initial version of the forecast, and may contain inaccuracies – please refer to caveats and data limitations on page 10. 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.

**Work in Progress**
Based on current demand visibility information from Global Fund, PEPFAR, Kenya, South Africa. Dates refers to in-country delivery date and contains both actual and planned orders; not based on full reporting from all countries.

*Packs of 90 are converted to packs of 30 for consistency purposes.
Consolidated Demand Forecast Outlook

**Overall ARV Demand Outlook**
Q3 2019-Q4 2020, Number of packs, million

**Bold font – non-PPM countries**
- Malawi
- South Africa
- Tanzania
- Zimbabwe
- Ethiopia
- Zambia

**Regular font – PPM countries**
- Kenya
- Mozambique
- Nigeria
- Uganda
- Cote d'Ivoire

**Source:** PEPFAR, Government of Kenya, The Global Fund, South Africa

**Disclaimer:** This is an initial version of the forecast, and may contain inaccuracies – please refer to caveats and data limitations on page 10. 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, Government of Kenya, The Global Fund, South Africa
TLE 400 90 Tabs– Consolidated Demand Forecast Outlook

Overall ARV Demand Outlook
Q3 2019-Q4 2020, Number of packs, thousands

<table>
<thead>
<tr>
<th></th>
<th>Q3 2019</th>
<th>Q4 2019</th>
<th>Q1 2020</th>
<th>Q2 2020</th>
<th>Q3 2020</th>
<th>Q4 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>PEPFAR</td>
<td>392</td>
<td>18</td>
<td>18</td>
<td>430</td>
<td>18</td>
<td>48</td>
</tr>
<tr>
<td>Kenya</td>
<td>392</td>
<td>18</td>
<td>18</td>
<td>484</td>
<td>18</td>
<td>48</td>
</tr>
<tr>
<td>Malawi</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>South Africa</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tanzania</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Zimbabwe</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ethiopia</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Zambia</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kenya</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mozambique</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nigeria</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Uganda</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cote d'Ivoire</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

DISCLAIMER: This is an initial version of the forecast, and may contain inaccuracies – please refer to caveats and data limitations on page 10. 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.

Overall ARV Demand Outlook
Q3 2019-Q4 2020, Number of packs, millions

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

DISCLAIMER: This is an initial version of the forecast, and may contain inaccuracies – please refer to caveats and data limitations on page 10. 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.

LPV/r 200/50– Consolidated Demand Forecast Outlook

Overall ARV Demand Outlook
Q3 2019-Q4 2020, Number of packs, thousands

**Bold font – non-PPM countries**

- Malawi
- South Africa
- Tanzania
- **Zimbabwe**
- Ethiopia
- Zambia

**Regular font – PPM countries**

- Kenya
- Mozambique
- Nigeria
- Uganda
- Cote d'Ivoire

**SOURCE:** PEPFAR, Government of Kenya, The Global Fund, South Africa

**DISCLAIMER:** This is an initial version of the forecast, and may contain inaccuracies – please refer to caveats and data limitations on page 10. 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.
Overall ARV Demand Outlook
Q3 2019-Q4 2020, Number of packs, thousands

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Malawi</th>
<th>South Africa</th>
<th>Tanzania</th>
<th>Zimbabwe</th>
<th>Ethiopia</th>
<th>Zambia</th>
<th>Kenya</th>
<th>Mozambique</th>
<th>Nigeria</th>
<th>Uganda</th>
<th>Cote d'Ivoire</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q3 2019</td>
<td>460</td>
<td>400</td>
<td>224</td>
<td>131</td>
<td>696</td>
<td>94</td>
<td>115</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q4 2019</td>
<td>523</td>
<td>252</td>
<td>299</td>
<td></td>
<td>567</td>
<td>578</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q1 2020</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q2 2020</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q3 2020</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q4 2020</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**DISCLAIMER:** This is an initial version of the forecast, and may contain inaccuracies – please refer to caveats and data limitations on page 10. 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, Government of Kenya, The Global Fund, South Africa
ABC/3TC 600/300– Consolidated Demand Forecast Outlook

Overall ARV Demand Outlook
Q3 2019-Q4 2020, Number of packs, thousands

<table>
<thead>
<tr>
<th>Country</th>
<th>Q3 2019</th>
<th>Q4 2019</th>
<th>Q1 2020</th>
<th>Q2 2020</th>
<th>Q3 2020</th>
<th>Q4 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Malawi</td>
<td>81</td>
<td>14</td>
<td>16</td>
<td>130</td>
<td>114</td>
<td>70</td>
</tr>
<tr>
<td>Tanzania</td>
<td>530</td>
<td>616</td>
<td>87</td>
<td>256</td>
<td>110</td>
<td>395</td>
</tr>
<tr>
<td>Zimbabwe</td>
<td>14</td>
<td>16</td>
<td>114</td>
<td>256</td>
<td>40</td>
<td>413</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>95</td>
<td>87</td>
<td>130</td>
<td>256</td>
<td>110</td>
<td>18</td>
</tr>
<tr>
<td>Zambia</td>
<td>130</td>
<td>256</td>
<td>114</td>
<td>70</td>
<td>40</td>
<td>395</td>
</tr>
<tr>
<td>Kenya</td>
<td>87</td>
<td>130</td>
<td>114</td>
<td>256</td>
<td>110</td>
<td>413</td>
</tr>
</tbody>
</table>


DISCLAIMER: This is an initial version of the forecast, and may contain inaccuracies – please refer to caveats and data limitations on page 10. 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.
EFV 600 – Consolidated Demand Forecast Outlook

Overall ARV Demand Outlook
Q3 2019-Q4 2020, Number of packs, thousands

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

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

<table>
<thead>
<tr>
<th>Country</th>
<th>Q3 2019</th>
<th>Q4 2019</th>
<th>Q1 2020</th>
<th>Q2 2020</th>
<th>Q3 2020</th>
<th>Q4 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>PEPFAR</td>
<td>342</td>
<td>312</td>
<td>378</td>
<td>340</td>
<td>285</td>
<td>257</td>
</tr>
<tr>
<td>Republic of South Africa</td>
<td>306</td>
<td>306</td>
<td>292</td>
<td>278</td>
<td>264</td>
<td>250</td>
</tr>
<tr>
<td>The Global Fund</td>
<td>36</td>
<td>6</td>
<td>86</td>
<td>39</td>
<td>21</td>
<td>7</td>
</tr>
</tbody>
</table>

**DISCLAIMER:** This is an initial version of the forecast, and may contain inaccuracies – please refer to caveats and data limitations on page 10. 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, Government of Kenya, The Global Fund, South Africa
3TC/AZT 150/300 – Consolidated Demand Forecast Outlook

Overall ARV Demand Outlook
Q3 2019-Q4 2020, Number of packs, millions

<table>
<thead>
<tr>
<th>Country</th>
<th>Q3 2019</th>
<th>Q4 2019</th>
<th>Q1 2020</th>
<th>Q2 2020</th>
<th>Q3 2020</th>
<th>Q4 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>PEPFAR</td>
<td>1.09</td>
<td>0.61</td>
<td>0.24</td>
<td>0.21</td>
<td>0.24</td>
<td>0.25</td>
</tr>
<tr>
<td>Kenya</td>
<td>0.16</td>
<td>0.20</td>
<td>0.03</td>
<td>0.09</td>
<td>0.07</td>
<td>0.05</td>
</tr>
<tr>
<td>Republic of South Africa</td>
<td>1.3</td>
<td>1.2</td>
<td>1.2</td>
<td>1.2</td>
<td>1.2</td>
<td>1.2</td>
</tr>
<tr>
<td>The Global Fund</td>
<td>2.1</td>
<td>1.4</td>
<td>1.5</td>
<td>2.0</td>
<td>1.5</td>
<td>1.5</td>
</tr>
</tbody>
</table>

**Bold font – non-PPM countries**

- Malawi
- South Africa
- Tanzania
- Zimbabwe
- Ethiopia
- Zambia

**Regular font – PPM countries**

- Kenya
- Mozambique
- Nigeria
- Uganda
- Cote d'Ivoire

DISCLAIMER: This is an initial version of the forecast, and may contain inaccuracies – please refer to caveats and data limitations on page 10. 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.

TDF/3TC 300/300 – Consolidated Demand Forecast Outlook

Overall ARV Demand Outlook
Q3 2019-Q4 2020, Number of packs, thousands

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Malawi</th>
<th>South Africa</th>
<th>Tanzania</th>
<th>Zimbabwe</th>
<th>Ethiopia</th>
<th>Zambia</th>
<th>Kenya</th>
<th>Mozambique</th>
<th>Nigeria</th>
<th>Uganda</th>
<th>Cote d'Ivoire</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q3 2019</td>
<td>533</td>
<td>361</td>
<td>172</td>
<td>214</td>
<td>1,396</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q4 2019</td>
<td>233</td>
<td>214</td>
<td>161</td>
<td>224</td>
<td>1,141</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q1 2020</td>
<td>385</td>
<td>166</td>
<td>171</td>
<td>218</td>
<td>1,307</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q2 2020</td>
<td></td>
<td>171</td>
<td>218</td>
<td>260</td>
<td>649</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q3 2020</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>171</td>
<td>218</td>
<td>260</td>
<td>126</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Q4 2020</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>176</td>
<td></td>
<td>302</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

DISCLAIMER: This is an initial version of the forecast, and may contain inaccuracies – please refer to caveats and data limitations on page 10. 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.

### Overall ARV Demand Outlook

**Q3 2019-Q4 2020, Number of packs, thousands**

<table>
<thead>
<tr>
<th>Republic of South Africa</th>
<th>Bold font – non-PPM countries</th>
<th>Regular font – PPM countries</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Malawi</td>
<td>Kenya</td>
</tr>
<tr>
<td></td>
<td>South Africa</td>
<td>Mozambique</td>
</tr>
<tr>
<td></td>
<td>Tanzania</td>
<td>Nigeria</td>
</tr>
<tr>
<td></td>
<td>Zimbabwe</td>
<td>Uganda</td>
</tr>
<tr>
<td></td>
<td>Ethiopia</td>
<td>Cote d'Ivoire</td>
</tr>
<tr>
<td></td>
<td>Zambia</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Q3 2019</th>
<th>Q4 2019</th>
<th>Q1 2020</th>
<th>Q2 2020</th>
<th>Q3 2020</th>
<th>Q4 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>59</td>
<td>59</td>
<td>59</td>
<td>59</td>
<td>59</td>
<td>59</td>
</tr>
</tbody>
</table>

**DISCLAIMER:** This is an initial version of the forecast, and may contain inaccuracies – please refer to caveats and data limitations on page 10. 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, Government of Kenya, The Global Fund, South Africa
Overall ARV Demand Outlook
Q3 2019-Q4 2020, Number of packs, thousands

<table>
<thead>
<tr>
<th>Country</th>
<th>Q3 2019</th>
<th>Q4 2019</th>
<th>Q1 2020</th>
<th>Q2 2020</th>
<th>Q3 2020</th>
<th>Q4 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Malawi</td>
<td>312</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tanzania</td>
<td></td>
<td>218</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Zimbabwe</td>
<td></td>
<td></td>
<td></td>
<td>203</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ethiopia</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>South Africa</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Zambia</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kenya</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mozambique</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nigeria</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Uganda</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cote d'Ivoire</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

DISCLAIMER: This is an initial version of the forecast, and may contain inaccuracies – please refer to caveats and data limitations on page 10. 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.

Overall ARV Demand Outlook
Q3 2019-Q4 2020, Number of packs, thousands

<table>
<thead>
<tr>
<th></th>
<th>Q3 2019</th>
<th>Q4 2019</th>
<th>Q1 2020</th>
<th>Q2 2020</th>
<th>Q3 2020</th>
<th>Q4 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>PEPFAR</td>
<td>94</td>
<td>162</td>
<td>117</td>
<td>233</td>
<td>70</td>
<td>87</td>
</tr>
<tr>
<td>Kenya</td>
<td>35</td>
<td>30</td>
<td>30</td>
<td>92</td>
<td>40</td>
<td>57</td>
</tr>
<tr>
<td>The Global Fund</td>
<td>6</td>
<td>30</td>
<td>30</td>
<td>92</td>
<td>30</td>
<td>30</td>
</tr>
</tbody>
</table>

**Bold font – non-PPM countries**
- Malawi
- South Africa
- Tanzania
- Zimbabwe
- Ethiopia
- Zambia

**Regular font – PPM countries**
- Kenya
- Mozambique
- Nigeria
- Uganda
- Cote d'Ivoire

DISCLAIMER: This is an initial version of the forecast, and may contain inaccuracies – please refer to caveats and data limitations on page 10. 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.

### Overall ARV Demand Outlook

**Q3 2019-Q4 2020, Number of packs, thousands**

<table>
<thead>
<tr>
<th>Country</th>
<th>Q3 2019</th>
<th>Q4 2019</th>
<th>Q1 2020</th>
<th>Q2 2020</th>
<th>Q3 2020</th>
<th>Q4 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Malawi</td>
<td>110</td>
<td>13</td>
<td>131</td>
<td>121</td>
<td>149</td>
<td>135</td>
</tr>
<tr>
<td>South Africa</td>
<td>39</td>
<td>52</td>
<td>25</td>
<td>7</td>
<td>142</td>
<td>149</td>
</tr>
<tr>
<td>Tanzania</td>
<td>39</td>
<td>13</td>
<td>7</td>
<td>3</td>
<td>146</td>
<td>138</td>
</tr>
<tr>
<td>Zimbabwe</td>
<td>149</td>
<td>39</td>
<td>167</td>
<td>146</td>
<td>142</td>
<td>135</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>13</td>
<td>3</td>
<td>36</td>
<td>25</td>
<td>149</td>
<td>149</td>
</tr>
<tr>
<td>Zambia</td>
<td>110</td>
<td>52</td>
<td>131</td>
<td>121</td>
<td>149</td>
<td>135</td>
</tr>
<tr>
<td>Kenya</td>
<td>13</td>
<td>3</td>
<td>167</td>
<td>146</td>
<td>149</td>
<td>138</td>
</tr>
<tr>
<td>Mozambique</td>
<td>39</td>
<td>52</td>
<td>13</td>
<td>7</td>
<td>146</td>
<td>149</td>
</tr>
<tr>
<td>Nigeria</td>
<td>39</td>
<td>52</td>
<td>13</td>
<td>7</td>
<td>149</td>
<td>138</td>
</tr>
<tr>
<td>Uganda</td>
<td>39</td>
<td>52</td>
<td>13</td>
<td>7</td>
<td>146</td>
<td>135</td>
</tr>
<tr>
<td>Cote d'Ivoire</td>
<td>110</td>
<td>52</td>
<td>13</td>
<td>7</td>
<td>146</td>
<td>135</td>
</tr>
</tbody>
</table>

**Bold font – non-PPM countries**

**Regular font – PPM countries**

**DISCLAIMER:** This is an initial version of the forecast, and may contain inaccuracies – please refer to caveats and data limitations on page 10. 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, Government of Kenya, The Global Fund, South Africa
LPV/r 100/25– Consolidated Demand Forecast Outlook

Overall ARV Demand Outlook
Q3 2019-Q4 2020, Number of packs, thousands

bold font – non-PPM countries

regular font – PPM countries

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

DISCLAIMER: This is an initial version of the forecast, and may contain inaccuracies – please refer to caveats and data limitations on page 10. 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.