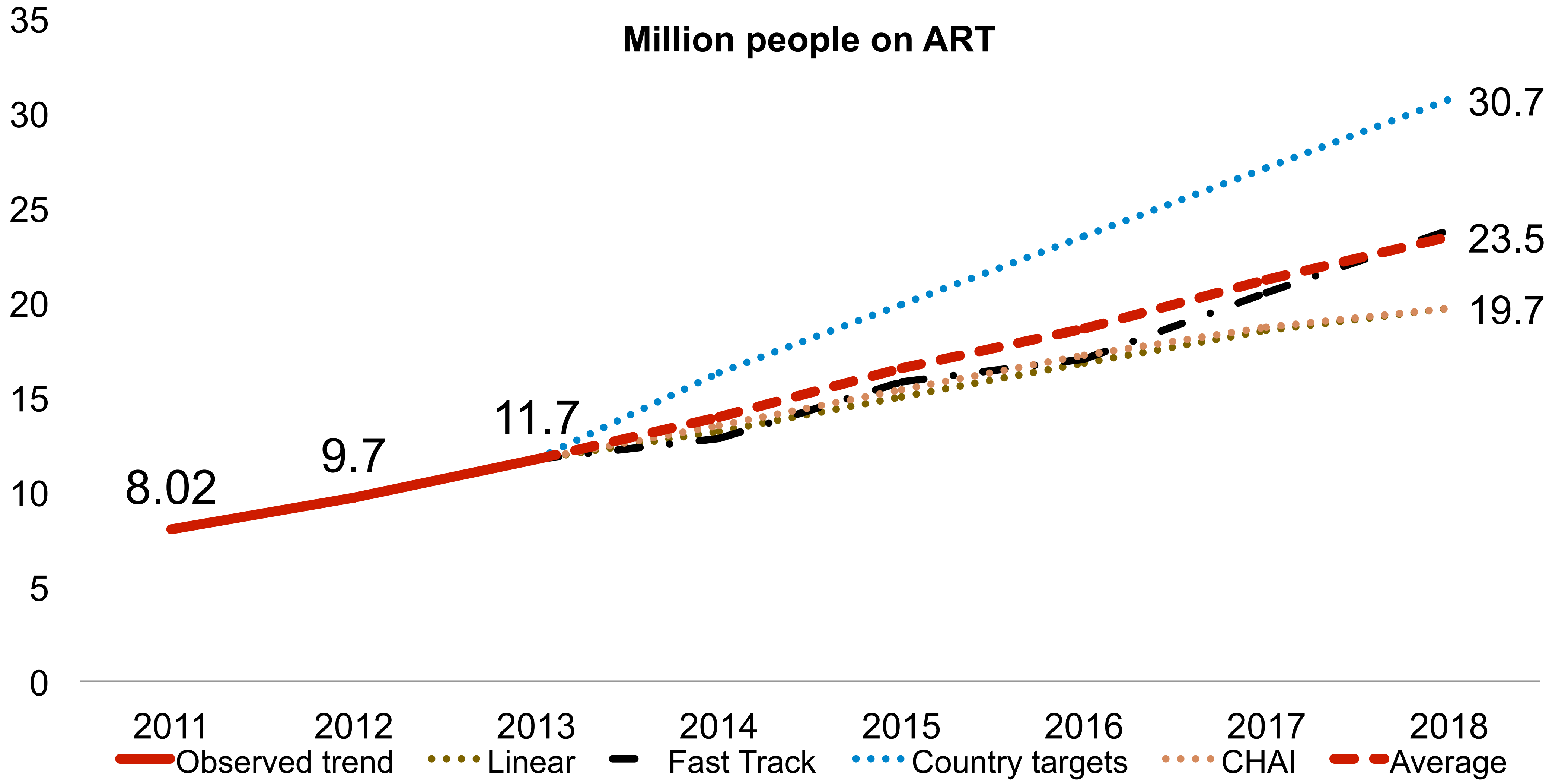
Forecasted demand for current and new ARV medicines in low and middle income countries, 2014-2025

J Perriëns (WHO), S Juneja (MPP) and V Prabhu (CHAI) on behalf of the WHO ARV *Forecasting Technical Working Group*

(Avenir Health, CDC, CHAI, GFATM, MPP, PfSCM, UNAIDS, UNICEF, USAID, WHO)

Observed trends and projected number of people on ART according to Linear, Fast Track, Country Target Projections, and Average of 4 Projections

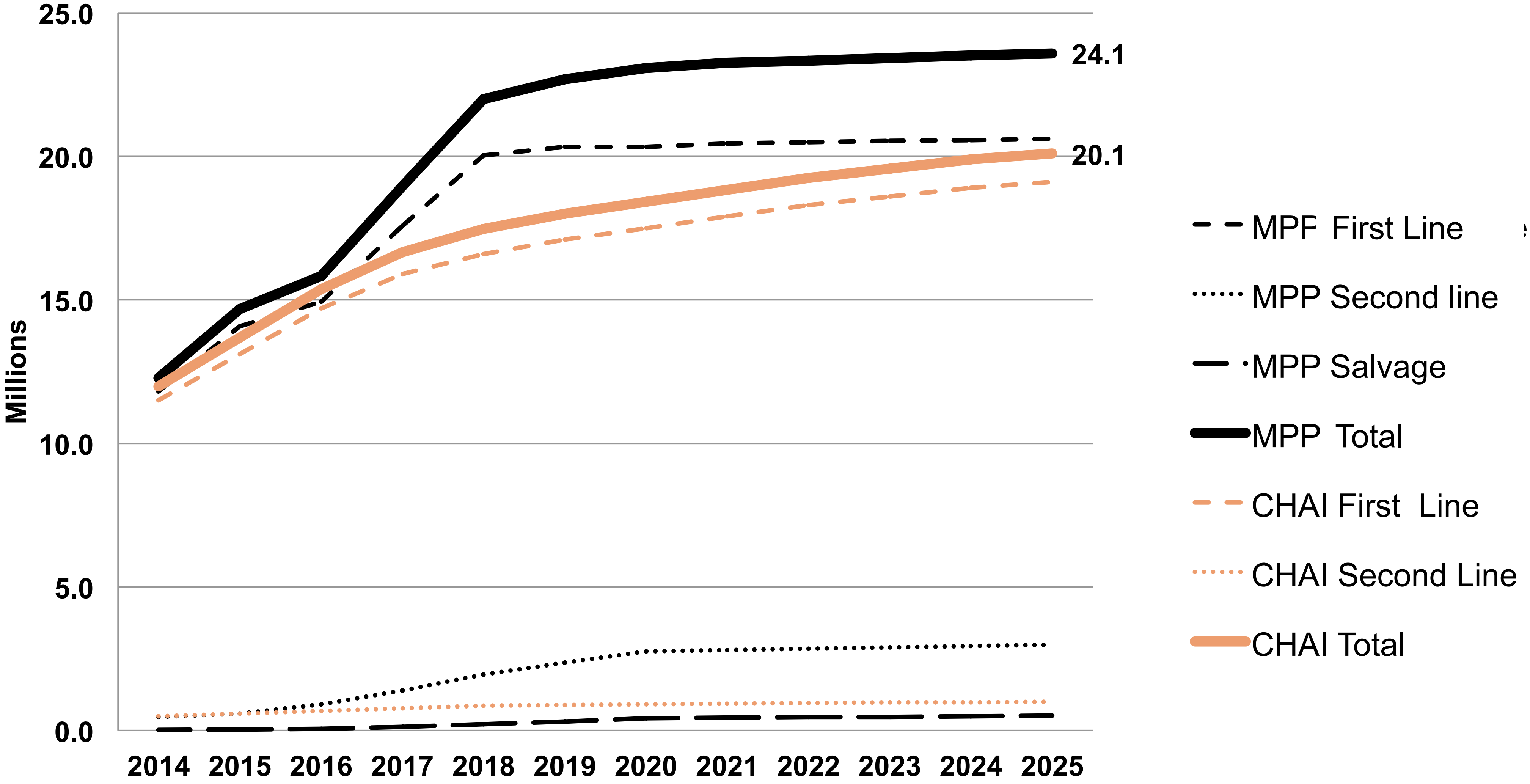


medicines patent pool

CLINTON HEALTH ACCESS INITIATIVE

World Health Organization

Millions of Adults Treated in MPP and CHAI scenarios



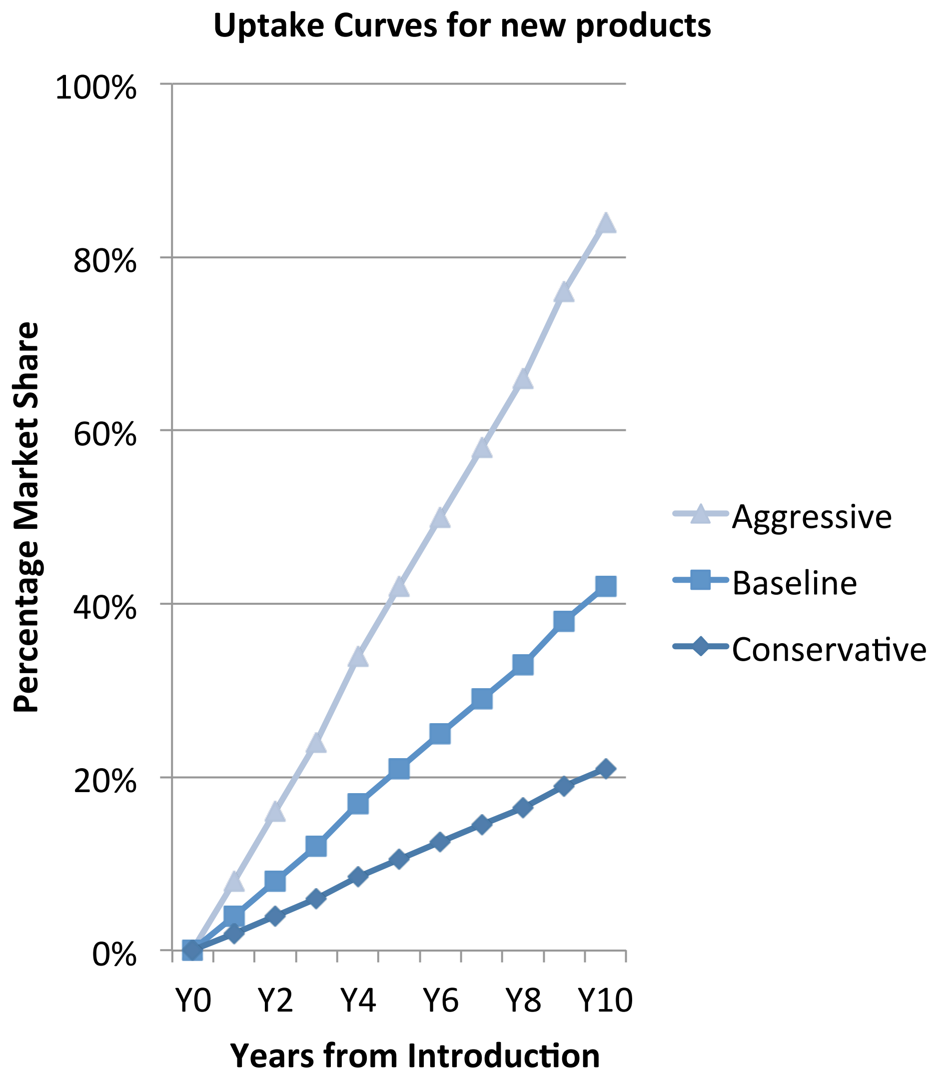
medicines patent pool

CLINTON HEALTH ACCESS INITIATIVE

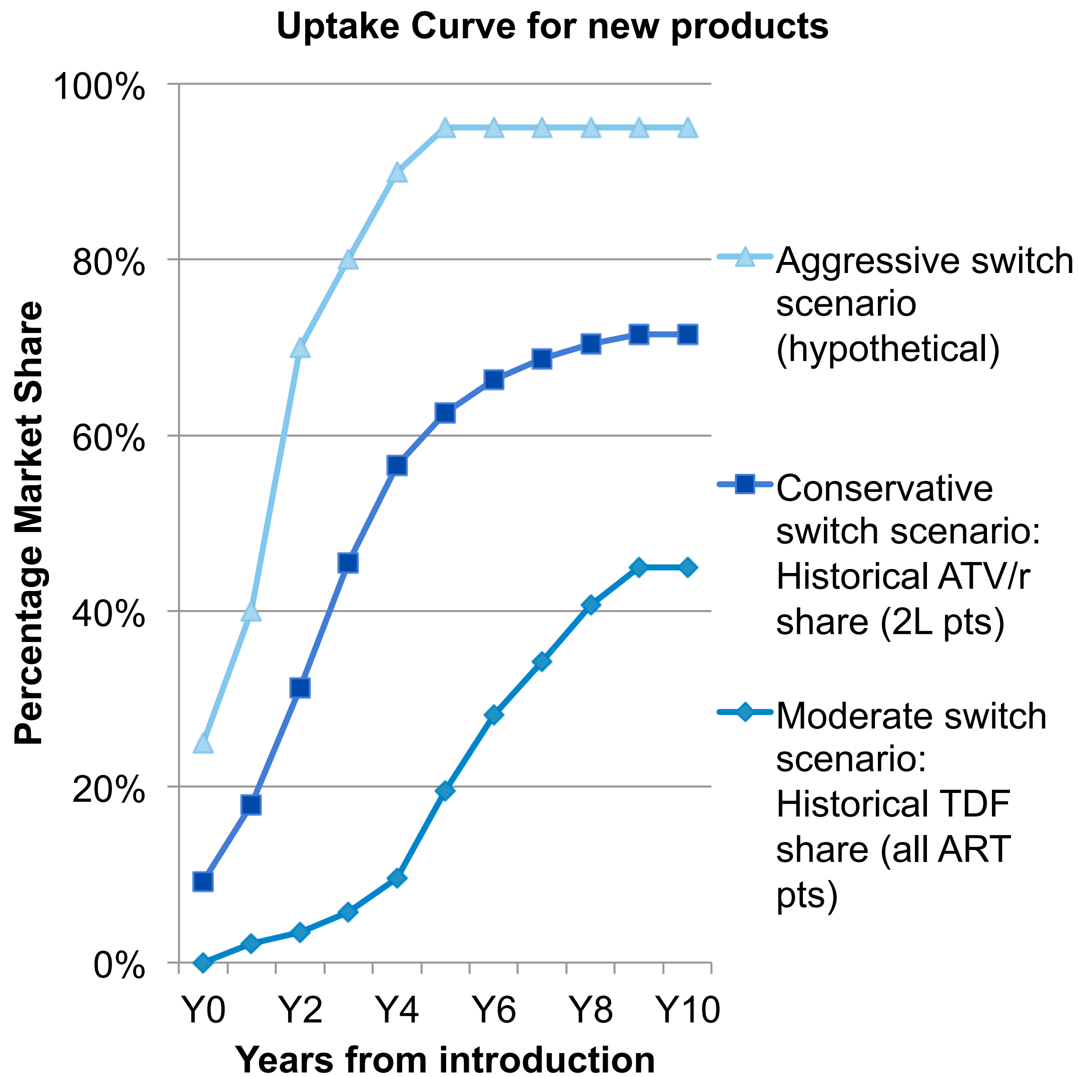
World Health Organization

Uptake curves

WHO/MPP



CHAI



Drugs included

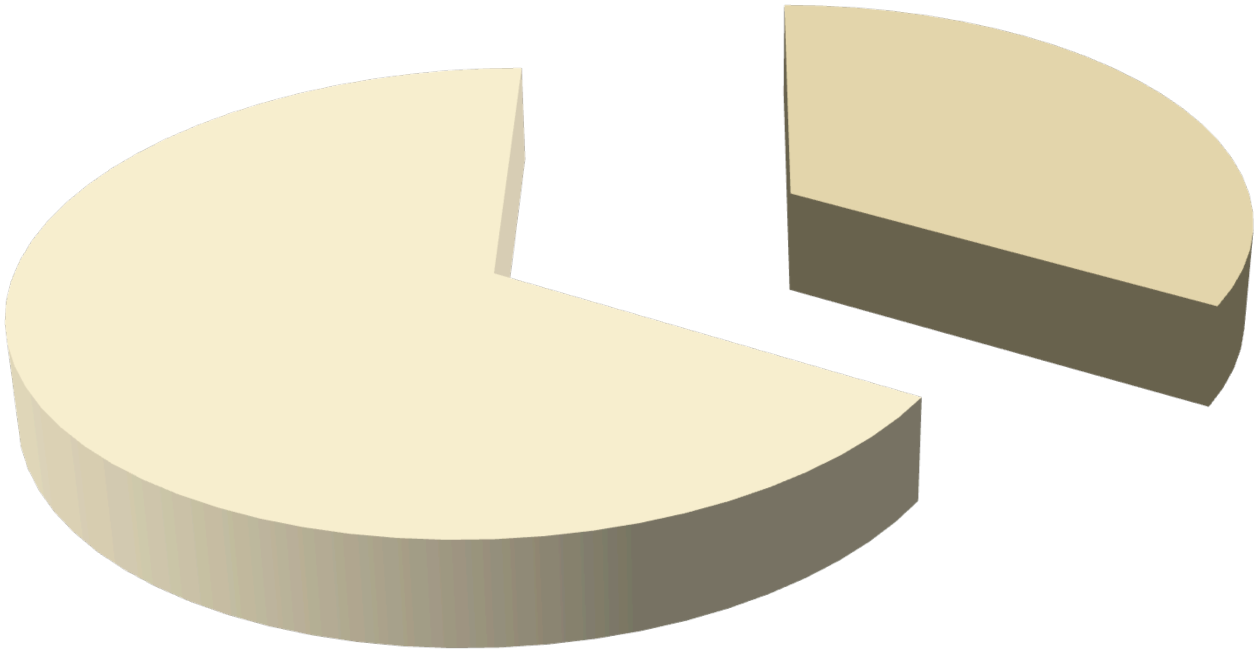
Backbone:

TDF+ XTC

TAF+ XTC

ZDV+XTC

DTG



Companion:

EFV, NVP

DTG

LPV/r

ATV/r

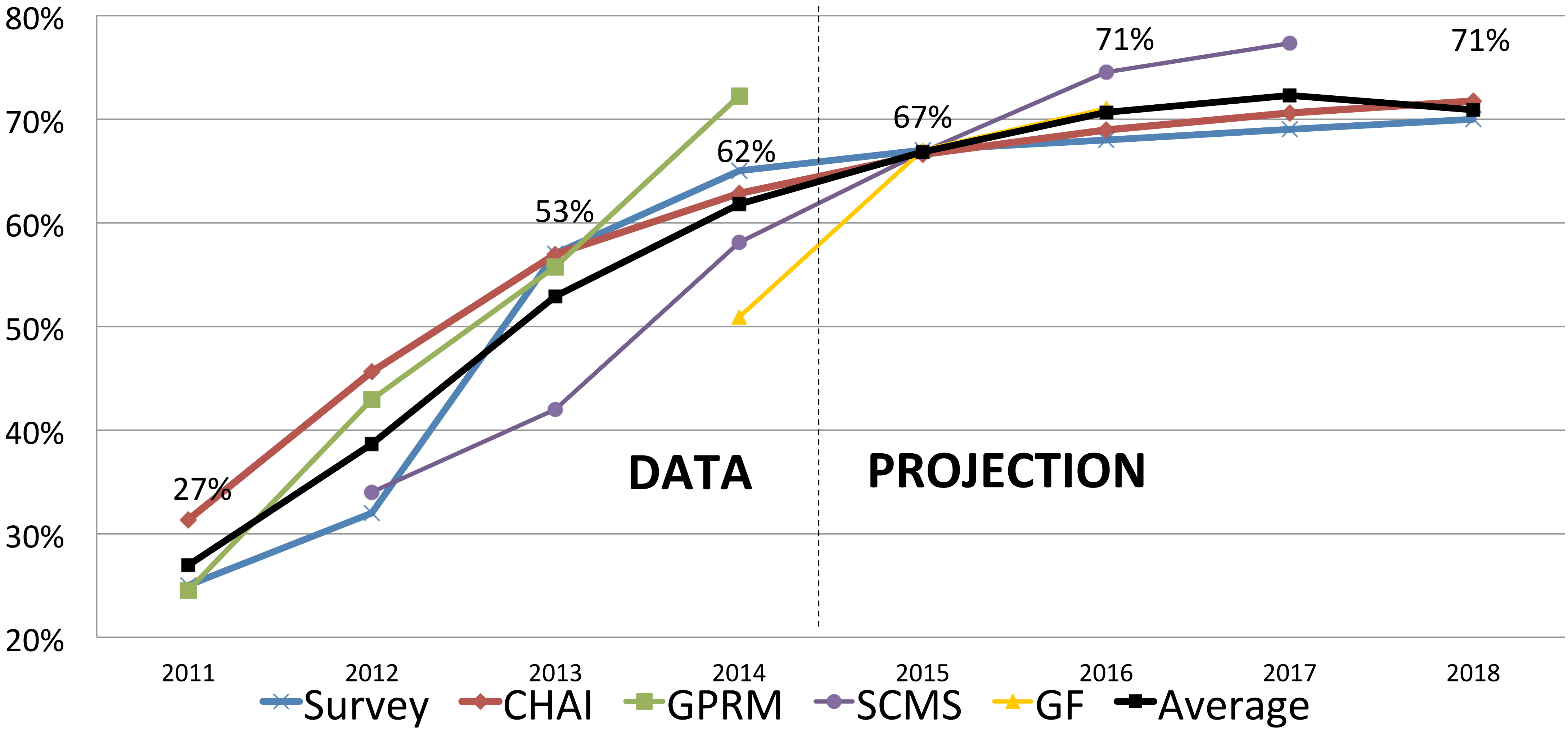
DRV/r

medicines patent pool

CLINTON HEALTH ACCESS INITIATIVE

World Health Organization

TDF+XTC % market share in backbone of treatment regimens

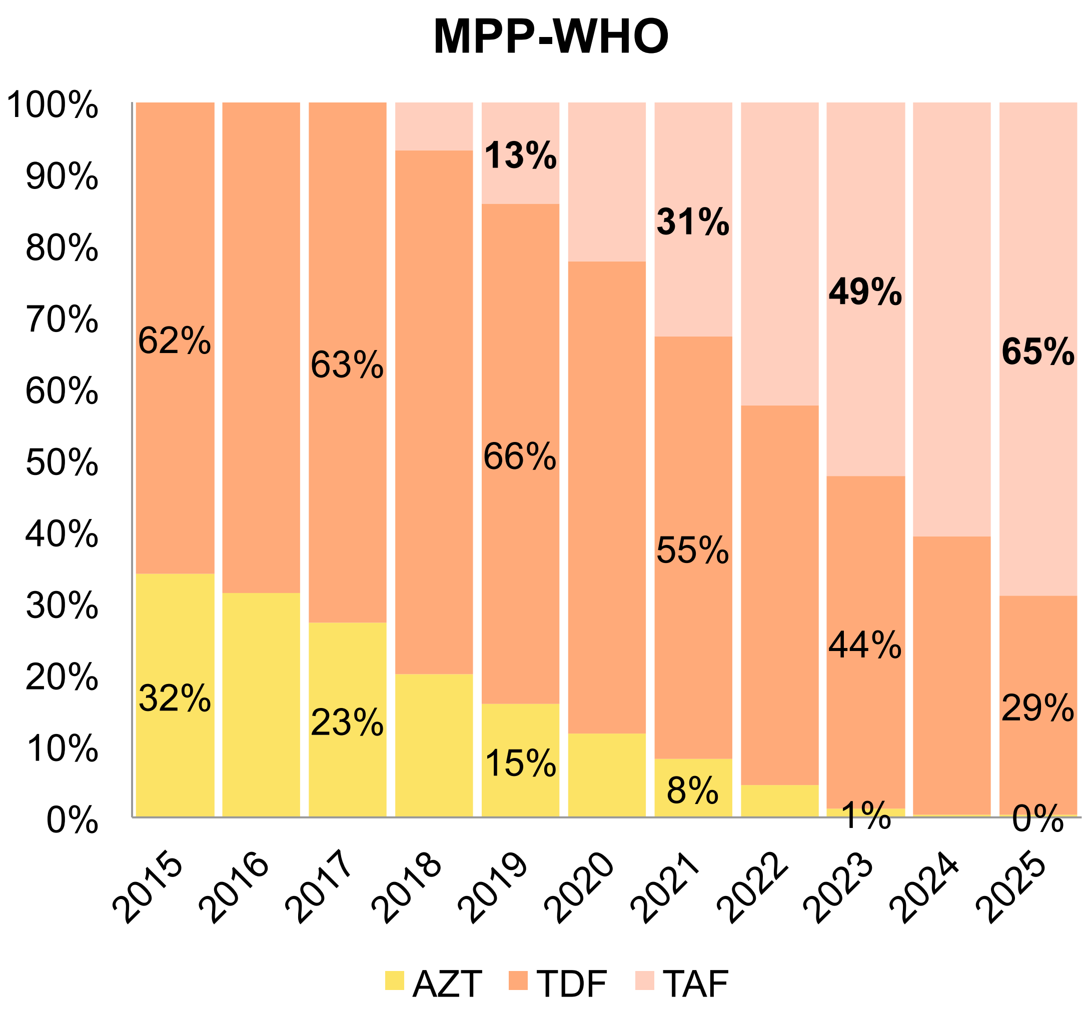


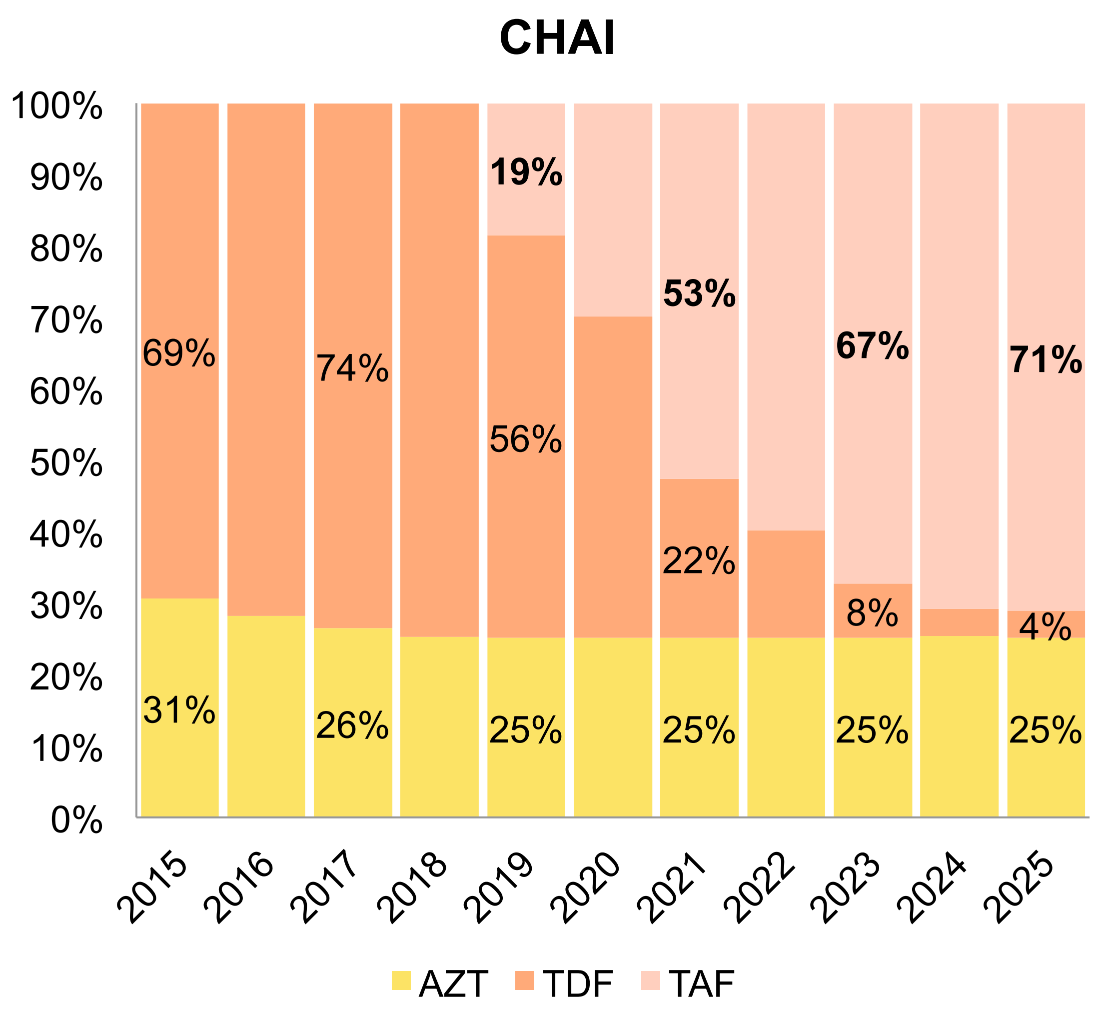
medicines patent pool

CLINTON HEALTH ACCESS INITIATIVE

World Health Organization

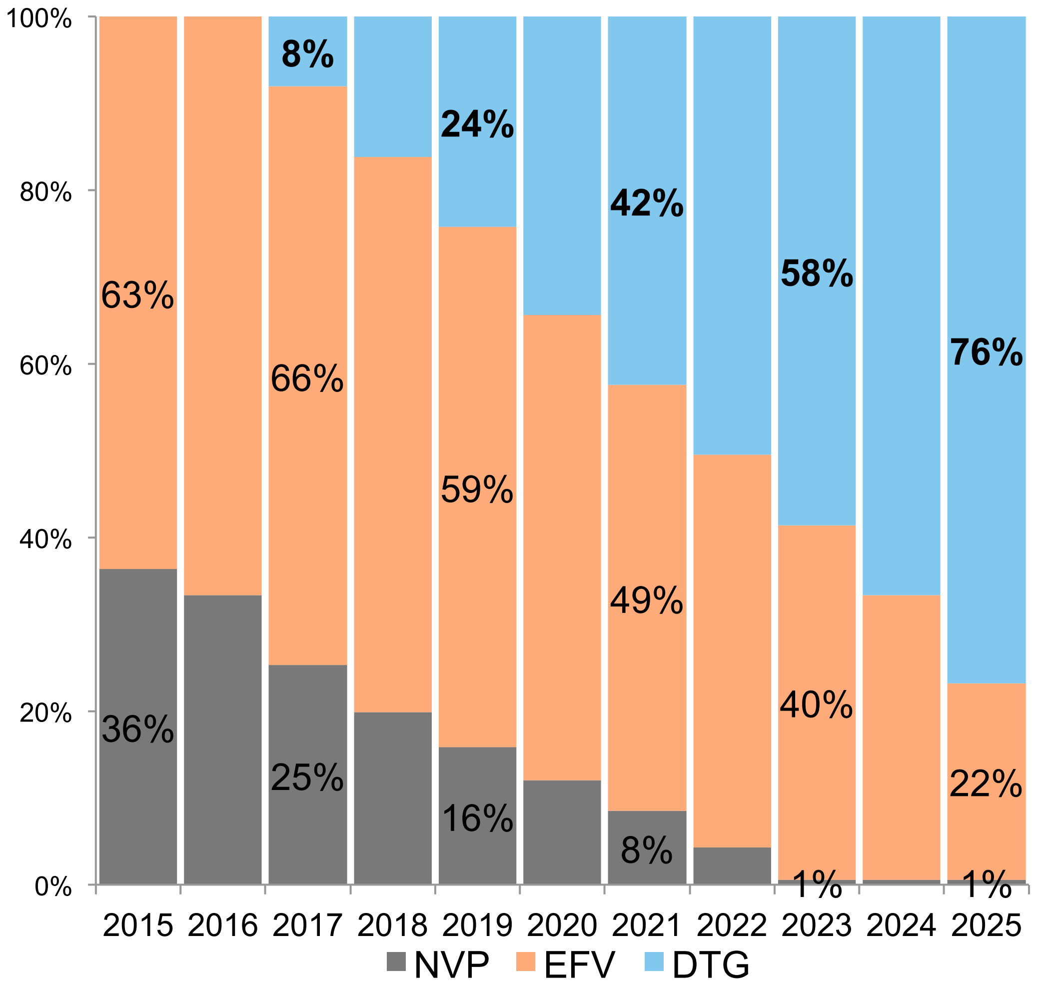
Percent of people on first line treatment taking TAF, TDF and ZDV



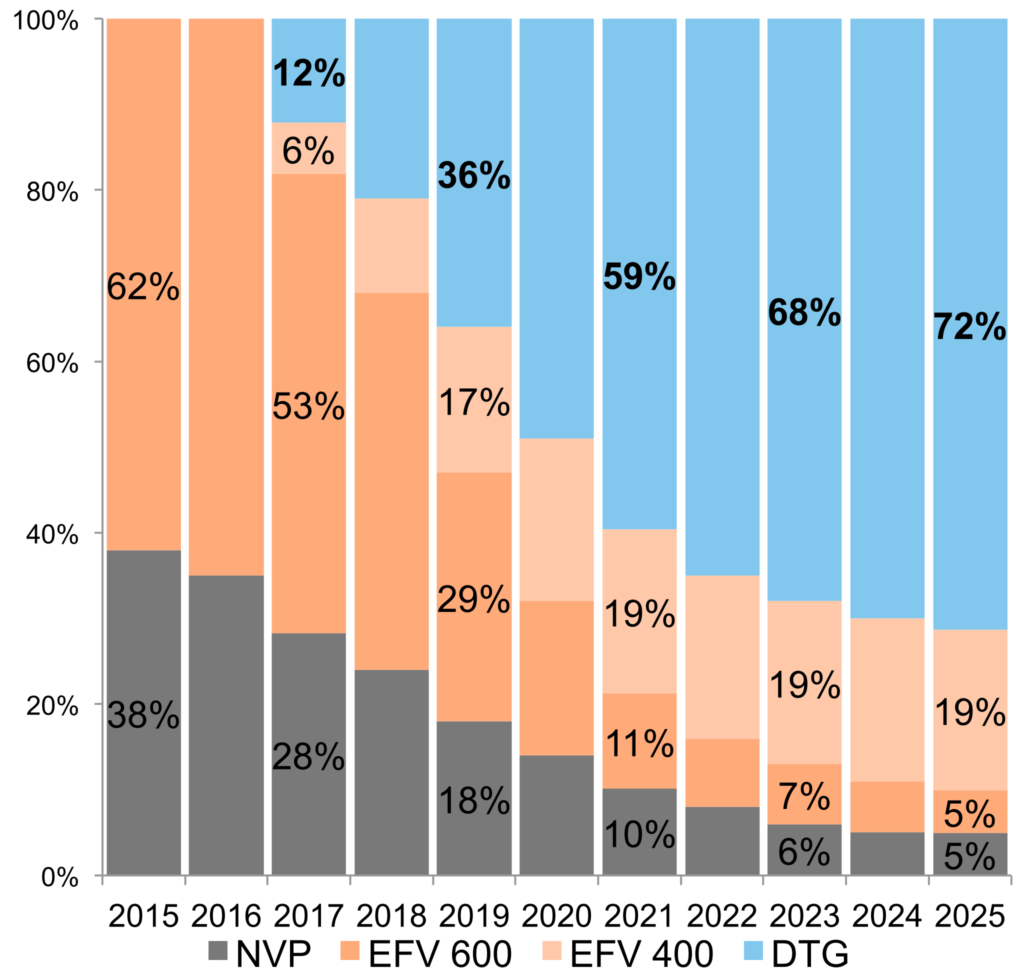


Percent of people on first-line treatment taking DTG vs. EFV vs. NVP

MPP-WHO



CHAI

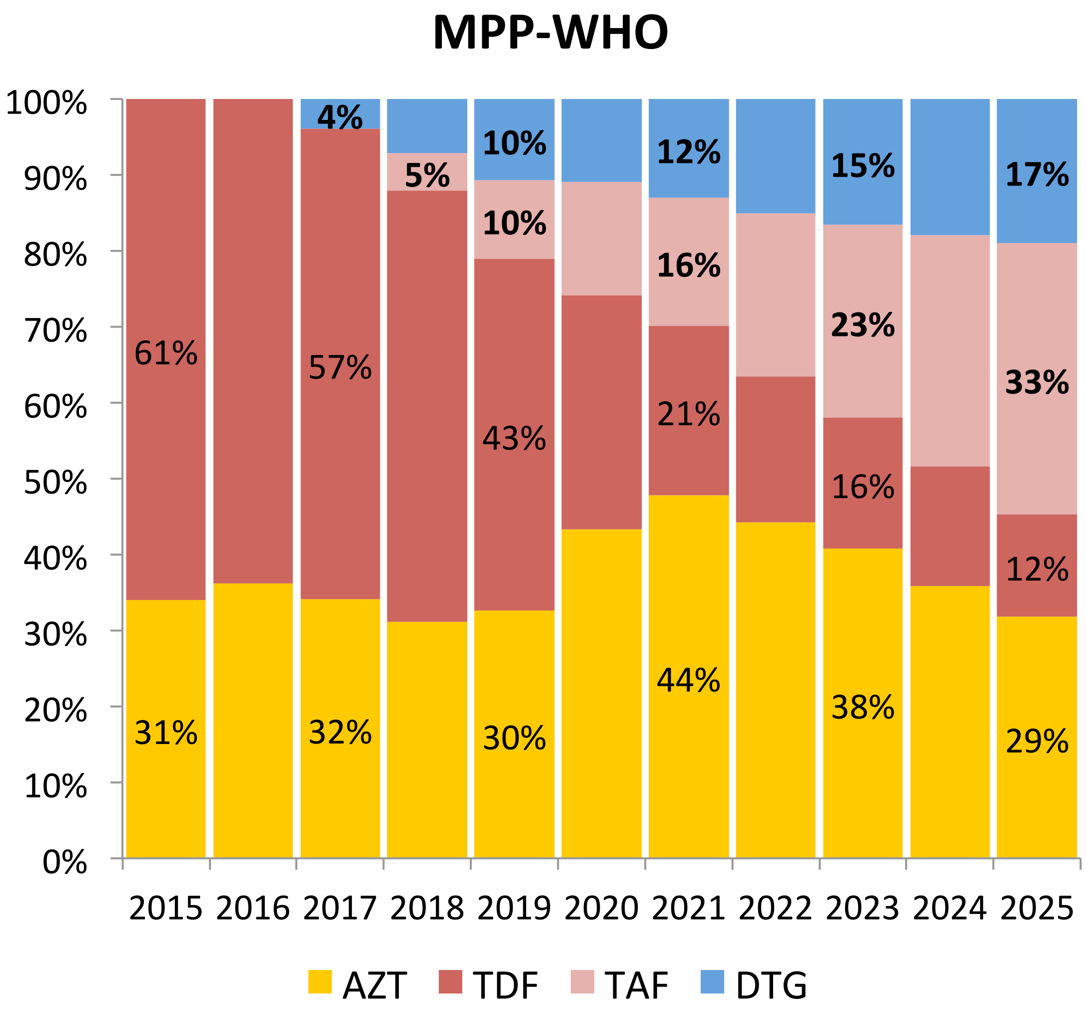


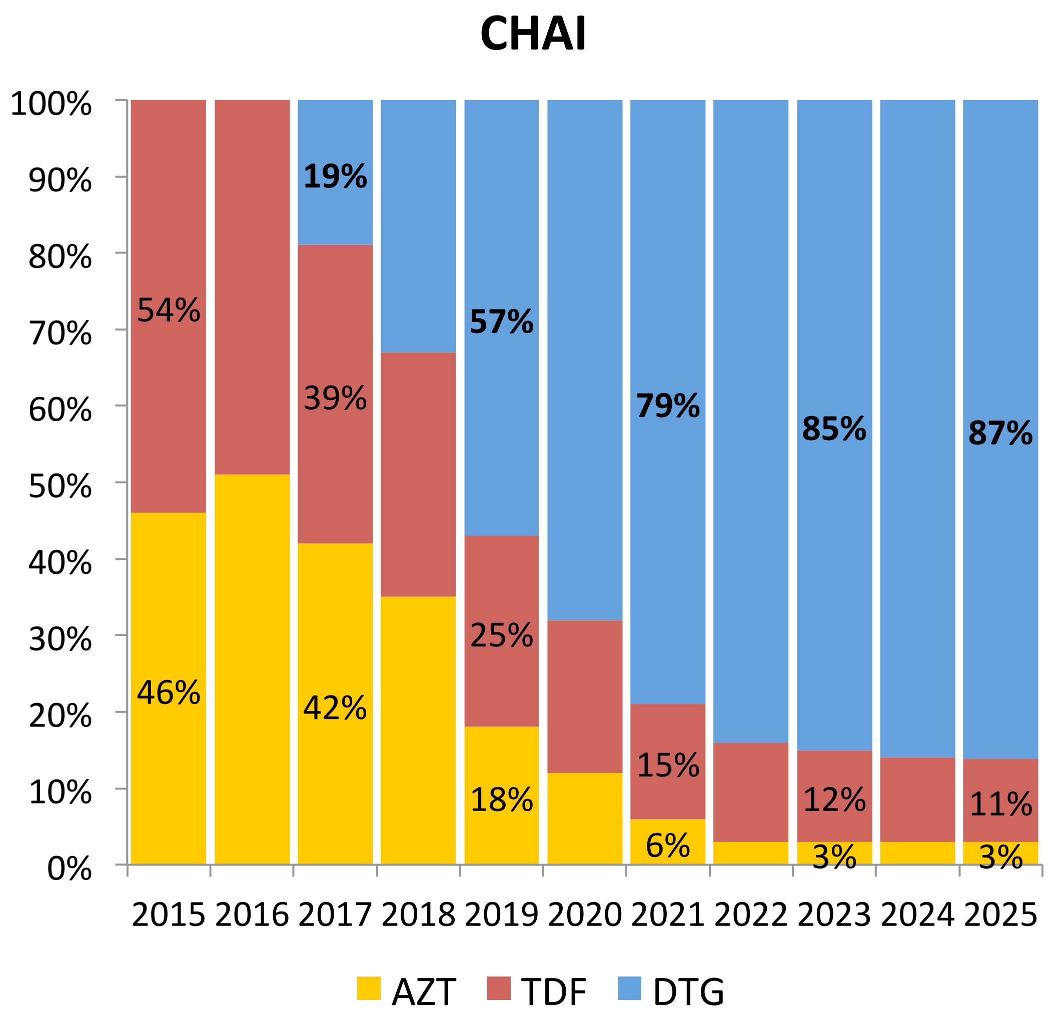
medicines patent pool

CLINTON HEALTH ACCESS INITIATIVE

World Health Organization

DTG, AZT, TDF, and TAF/XTC in backbone of second-line treatment



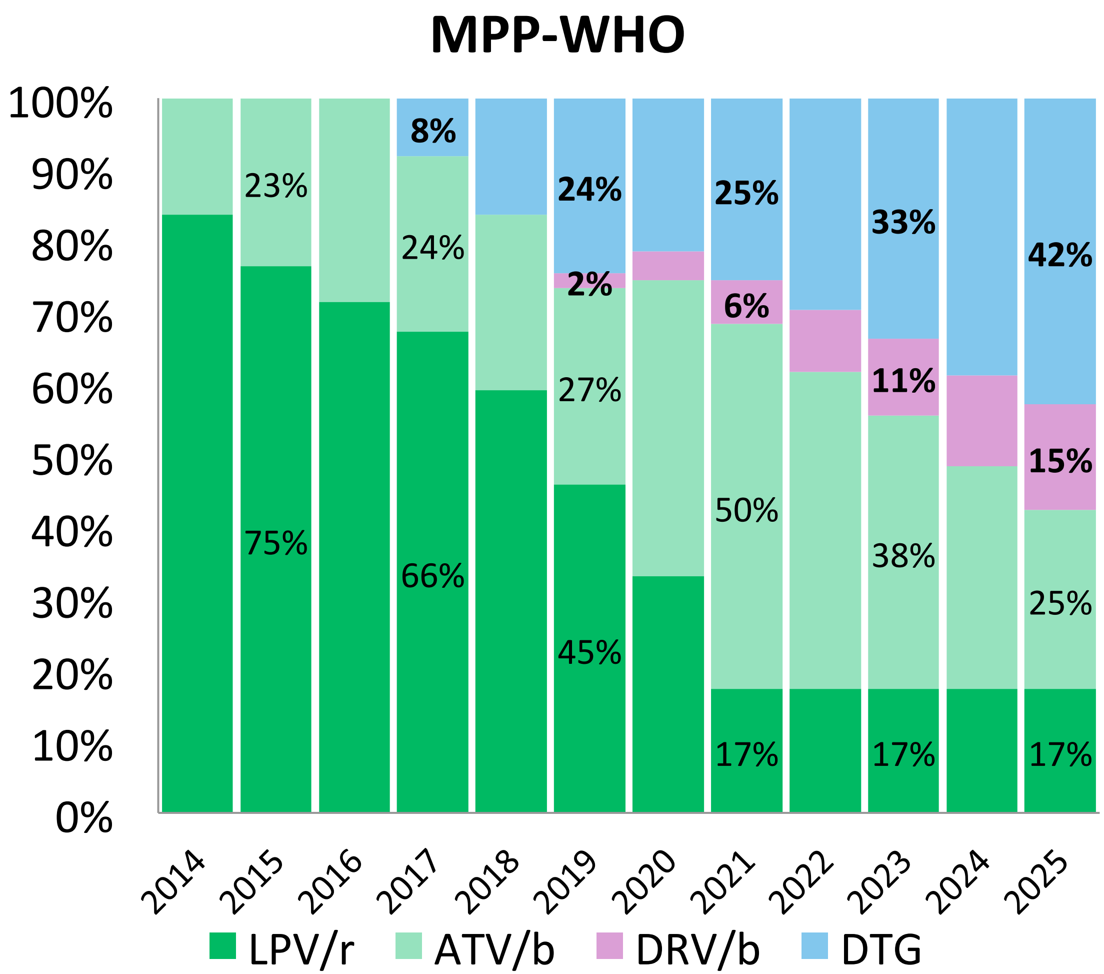


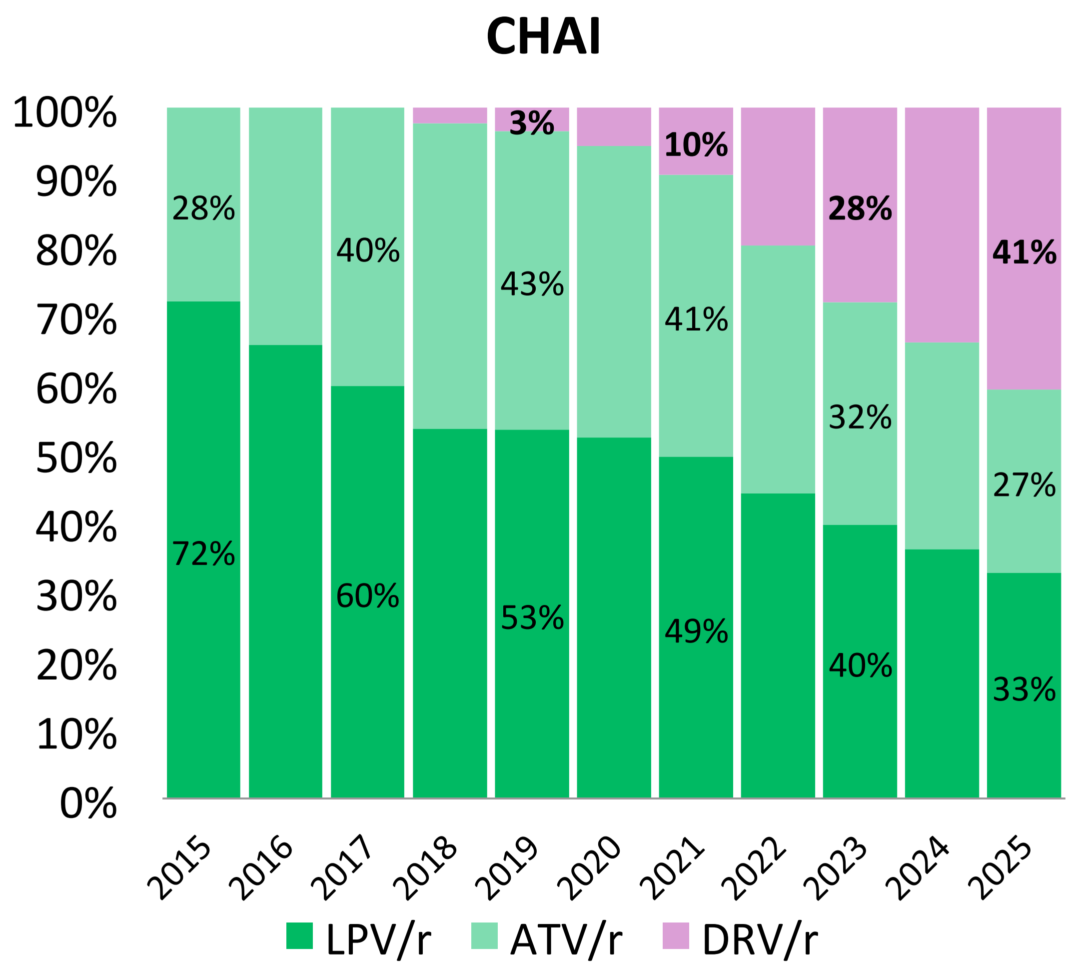
medicines patent pool

CLINTON HEALTH ACCESS INITIATIVE

World Health Organization

Protease inhibitors and DTG as companion drugs in second-line treatment





Note: DRV/r uptake highly dependent on reaching "at-scale" pricing parity with LPV/r, and likely cost offsets for (re)launch prices

medicines patent pool

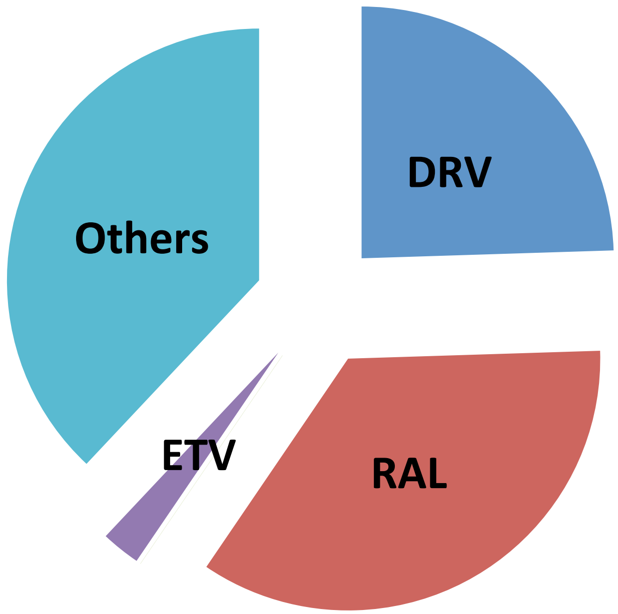
CLINTON HEALTH ACCESS INITIATIVE

World Health Organization

Main products used in salvage treatment

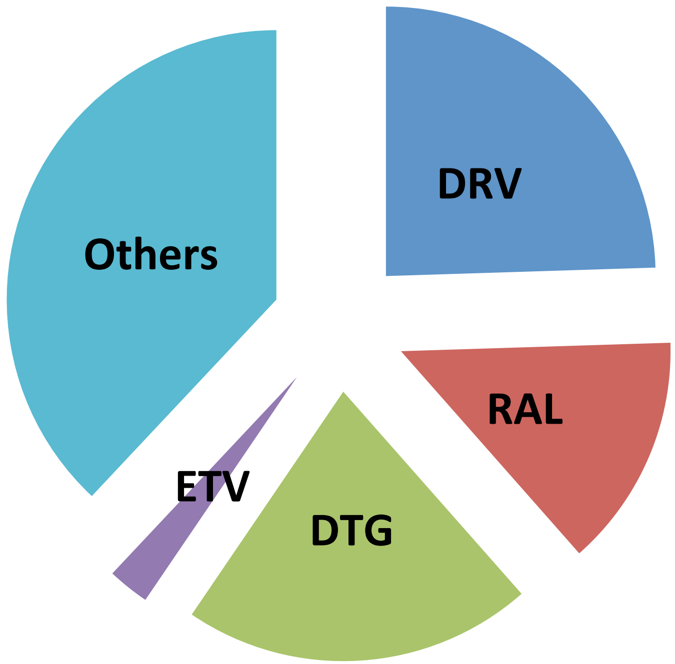
Usage in Resistant Patients: 2015

N = 25.900

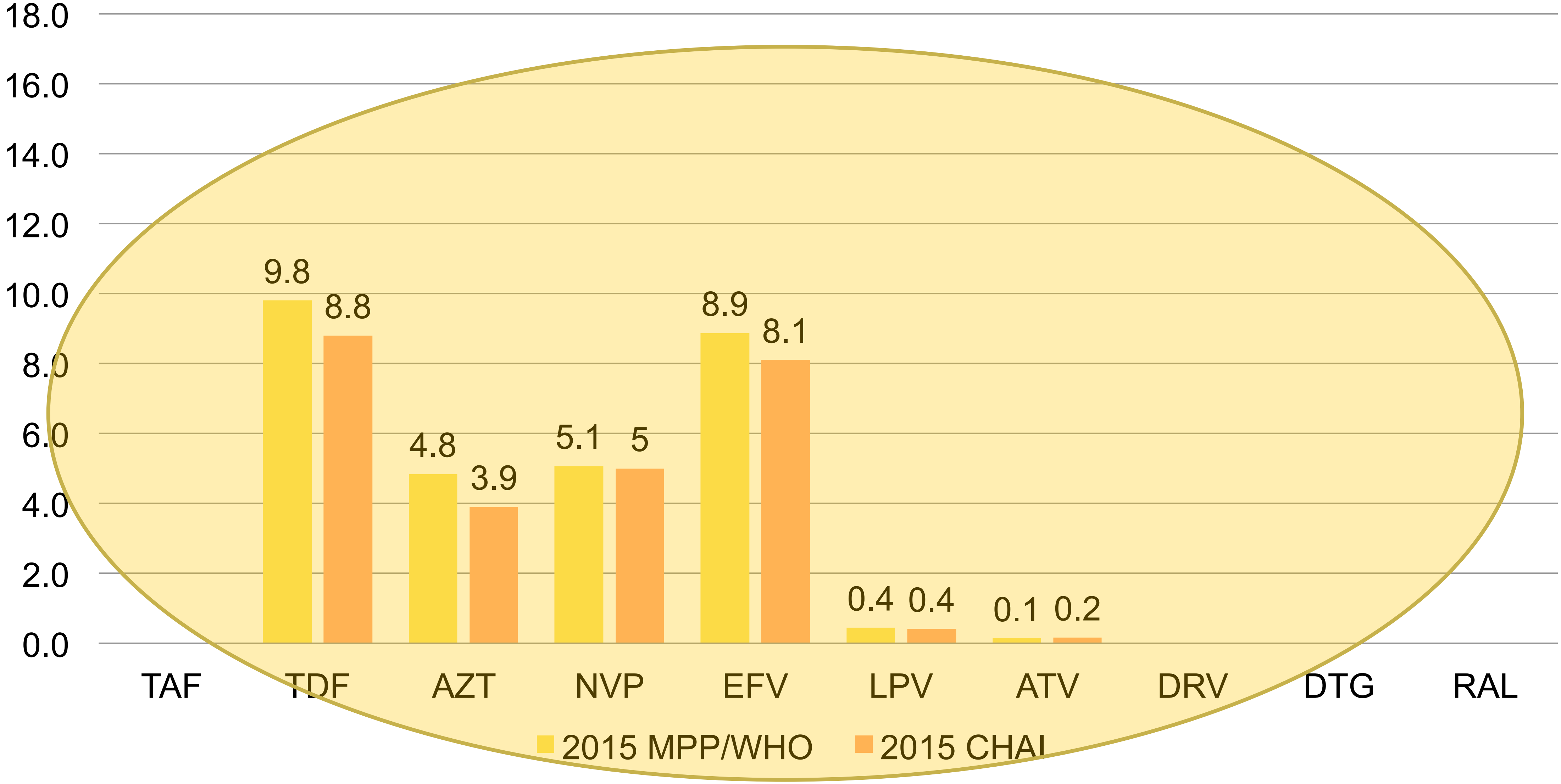


Usage in Resistant Patients: 2025

N = 506.700

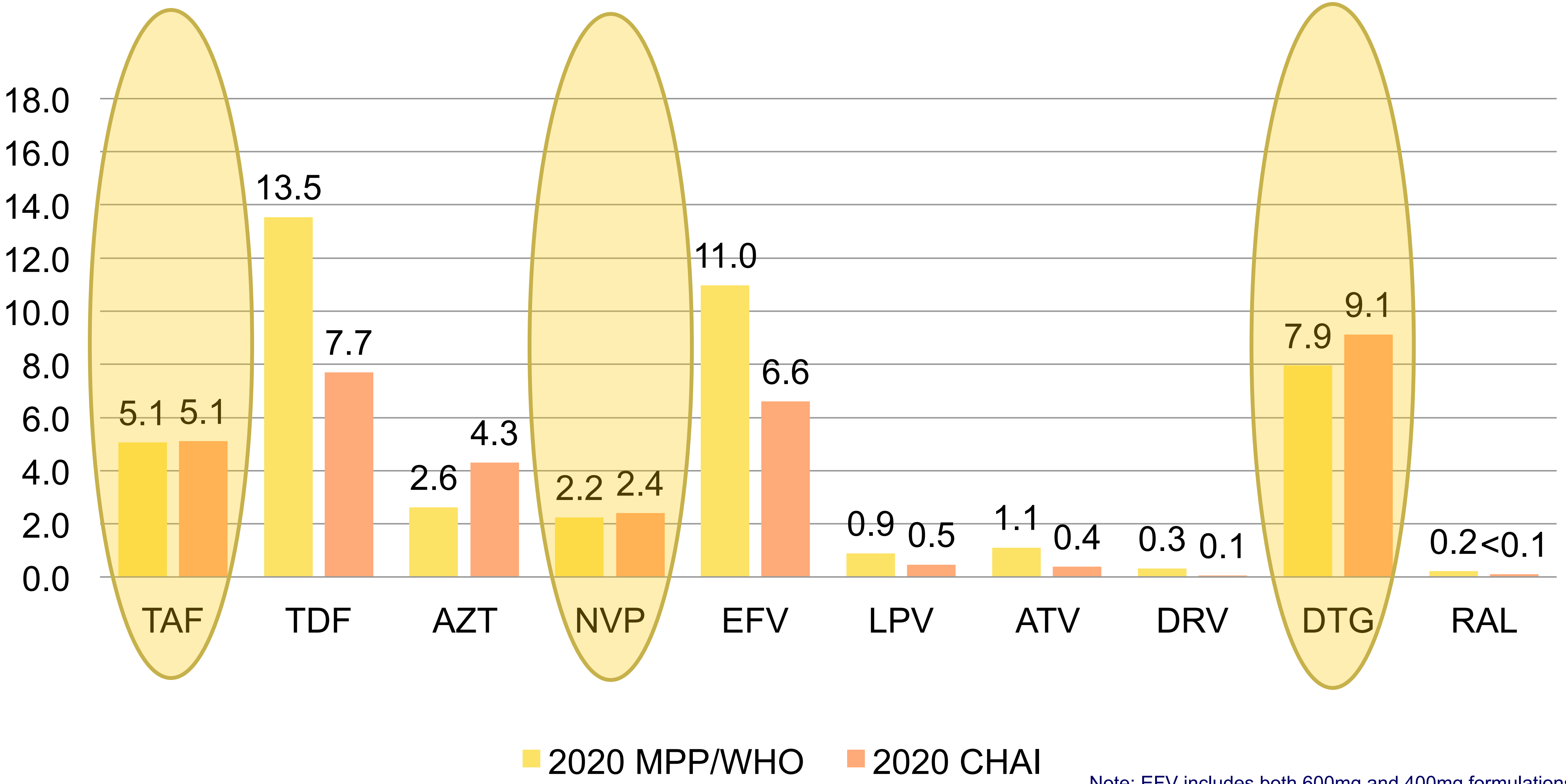


ARV use in 2015 - Million People by Active Ingredient



medicines patent pool
CLINTON HEALTH ACCESS INITIATIVE
World Health Organization

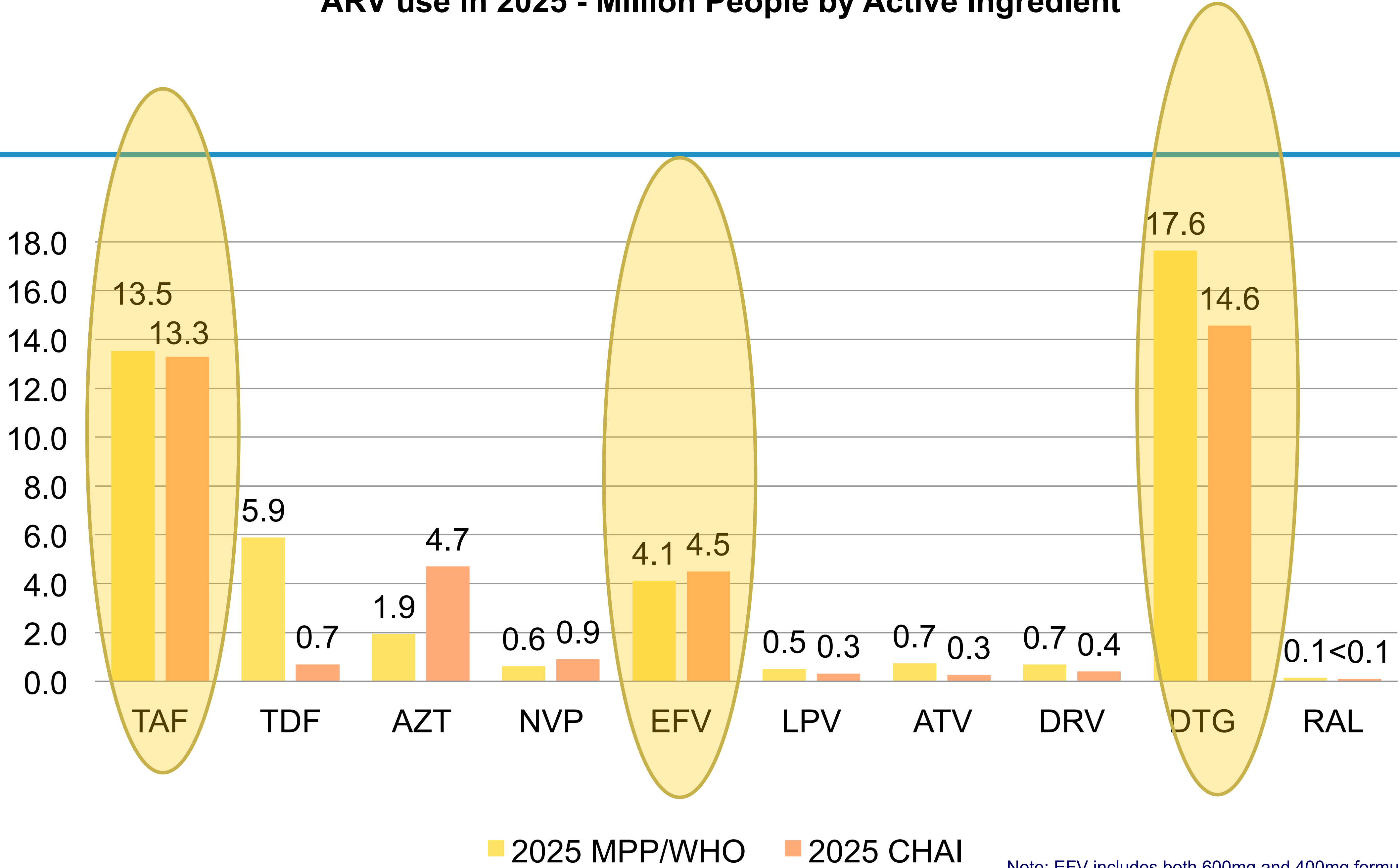
ARV use in 2020 - Million People by Active Ingredient



Note: EFV includes both 600mg and 400mg formulations

medicines patent pool
CLINTON HEALTH ACCESS INITIATIVE
World Health Organization

ARV use in 2025 - Million People by Active Ingredient



Note: EFV includes both 600mg and 400mg formulations

medicines patent pool

CLINTON HEALTH ACCESS INITIATIVE

World Health Organization

Conclusion

- Our forecasts include a mix of judgement and data
- Areas of convergence are useful to inform action
- Until more data become available, production of the current generation of ARVs needs to continue, and increase, to ensure that all necessary drugs will remain available.

medicines patent pool

CLINTON HEALTH ACCESS INITIATIVE

World Health Organization