From licensing to rolling out at scale: Trends in affordable access to DTG-based HIV treatments in low- and middle-income countries, 2014-2026

[abstract THPEE510]

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MPP thanks our founder and funder in HIV: **Unitaid**, our licensor for DTG: **ViiV Healthcare**, and our multiple **generic licensees** for DTG.

Background – *What the context of this work is*

In 2014, Medicines Patent Pool (MPP) and ViiV Healthcare announced licensing agreements to accelerate access to dolutegravir (DTG) in low- and middle-income countries (LMICs). We present insights based on a unique comprehensive dataset from MPP-licensed generic manufacturers, virtually covering all sales of generic DTG-products with stringent regulatory authority (SRA) approval or World Health Organization Prequalification (WHO PQ) supplied in LMICs since first generic regulatory approvals in 2017. The analysis focuses on correlates of price reductions and increased uptake for key DTG-based HIV treatment formulations.

Methods – *Where our data comes from*

We analysed data obtained, as part of licensing requirements, from 13 MPP-licensed DTG generic manufacturers covering pricing and supply volumes of DTG products between 2017 and 2026 (source: MPP licensees for DTG, June 2026). These include the WHO-recommended first-line fixed dosed combination (FDC) of TDF/3TC/DTG 300/300/50 mg (**TLD** – a unique FDC enabled by the licence) and the paediatric formulation of ABC/3TC/DTG 60/30/5 mg dispersible (**pALD**).

Results – *What the data shows*

Figure 1 shows a 92% decrease in generic **DTG** active pharmaceutical ingredient (API) price concomitant to a 1800-fold increase in API supplies between 2017 (Q2) and 2026 (Q1).

Figures 2 and 3 show incremental price reductions for generic DTG-based products; these reductions have started to slow down for adult DTG-based products (**Figure 2**):

- A price decrease of 63% for **DTG single** (DTG 50 mg)
- A price decrease of 56% for **TLD**
- A price decrease of 49% for **pDTG single** (paediatric DTG 10 mg scored dispersible)
- No meaningful price decrease (compared to launch price) yet for **pALD**, given its recent introduction – it is however looking to follow a similar trend as other generic DTG products.

Figure 4 shows the rollout progress of key adult and paediatric DTG-based products: with generic **DTG single**, **TLD**, **pDTG**, and **pALD** having now reached 128, 123, 106, and 47 LMICs, respectively.

Figure 1. Evolution of DTG API pricing (USD per kg) as a function of volumes supplied (in kg), with 2026 volumes extrapolated from a single quarter (Q1).

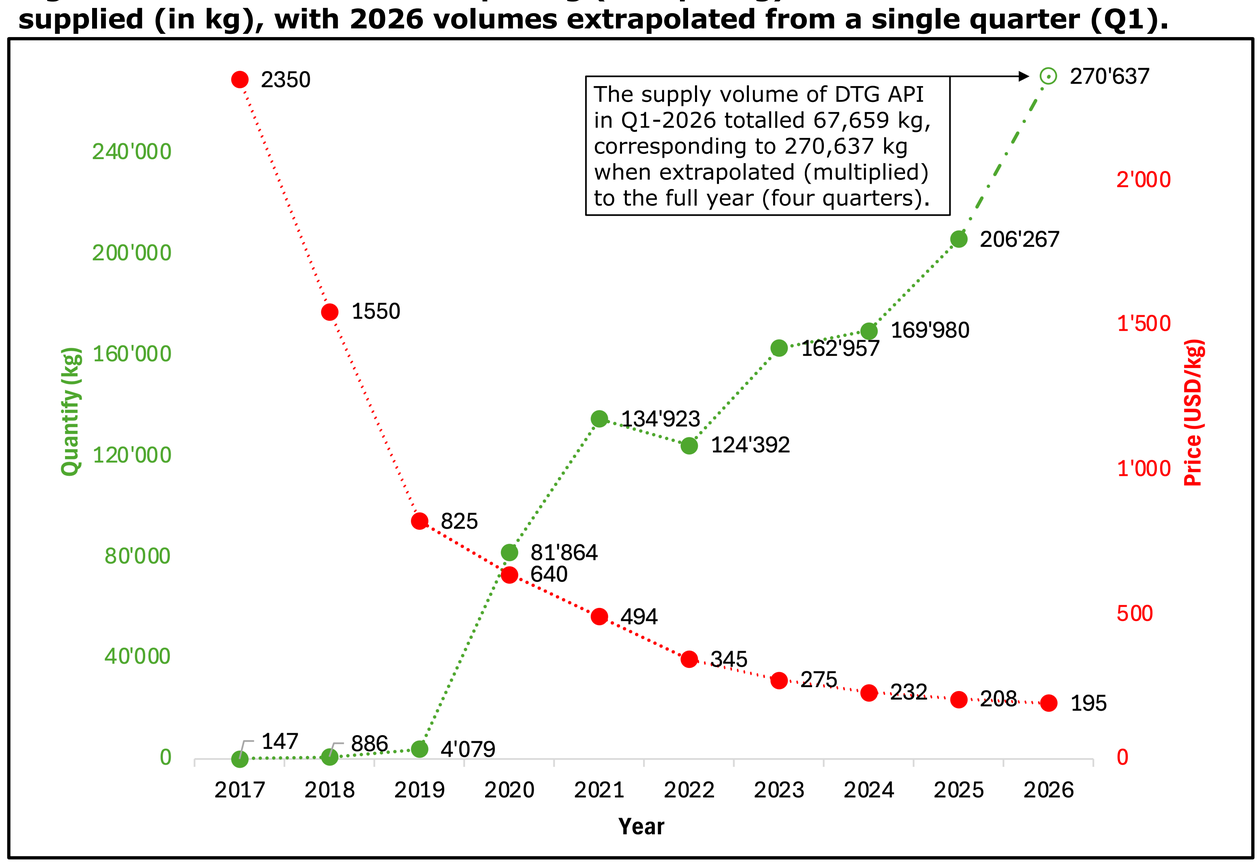


Figure 2. Evolution of adult DTG product pricing (with initial price normalized to 100%) as a function of volumes supplied (in monthly packs of 30 tablets).

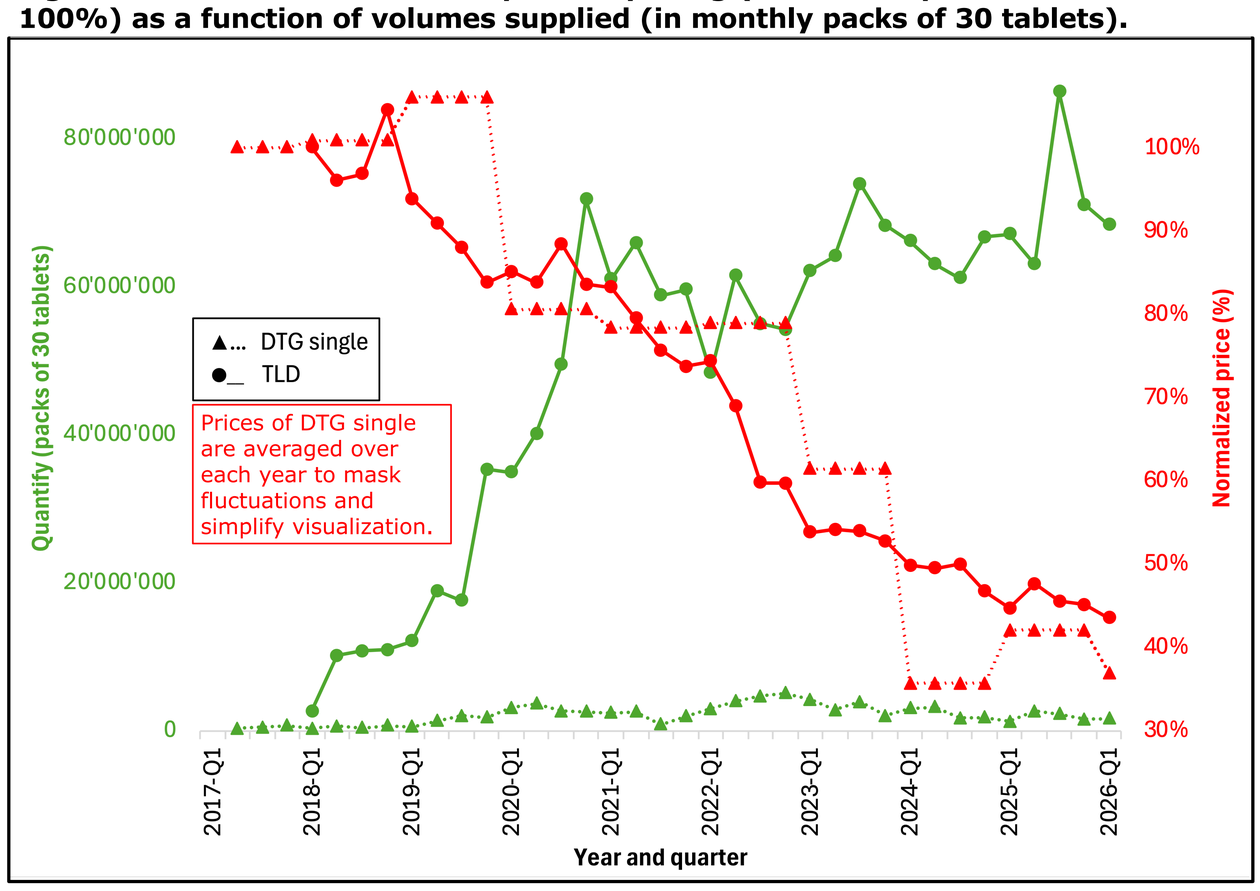


Figure 3. Evolution of paediatric DTG product pricing (with initial price normalized to 100%) as a function of volumes supplied (in equivalent pack sizes). The insert shows the total quantity of pDTG + pALD supplied (highlighting the transition to pALD).

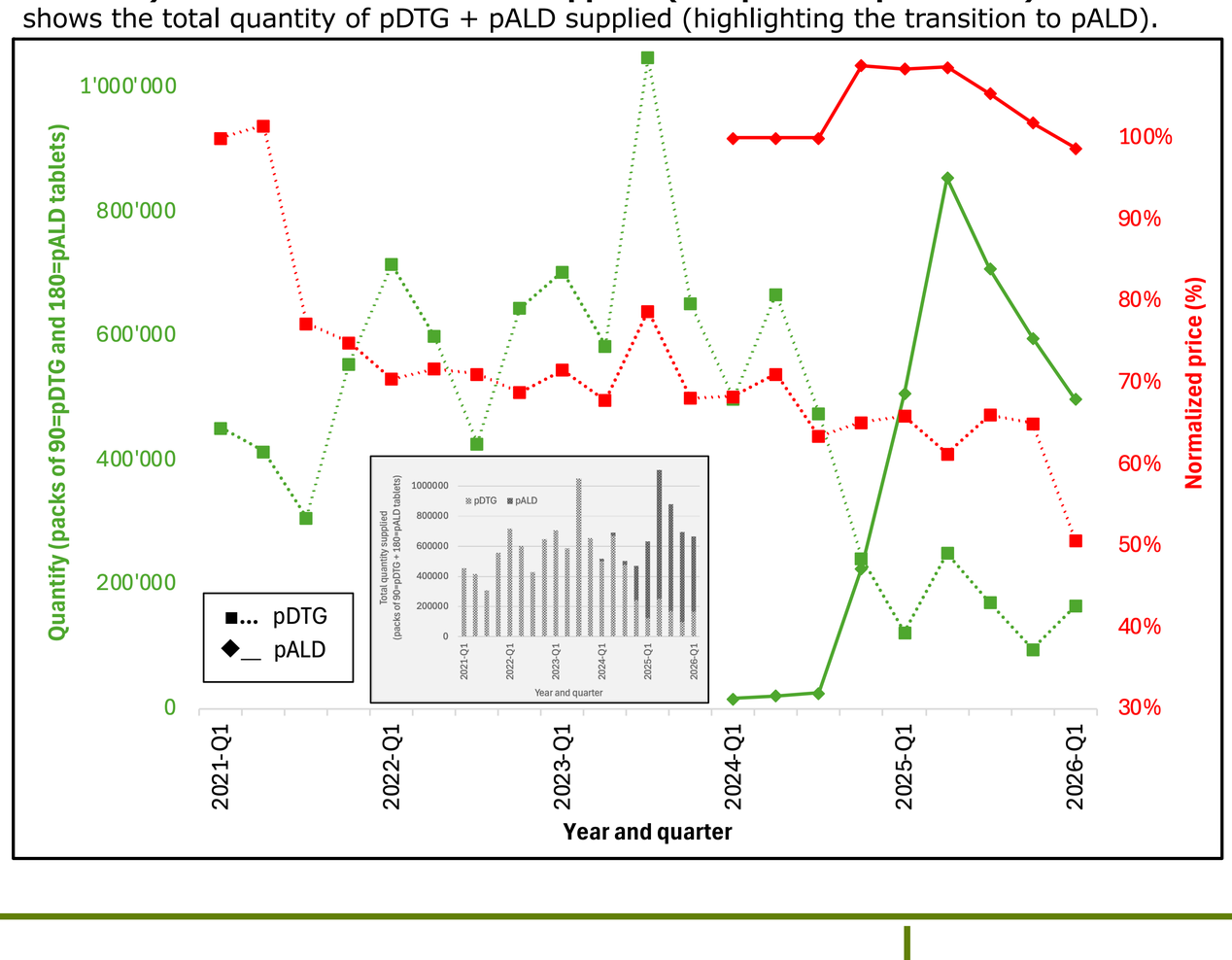
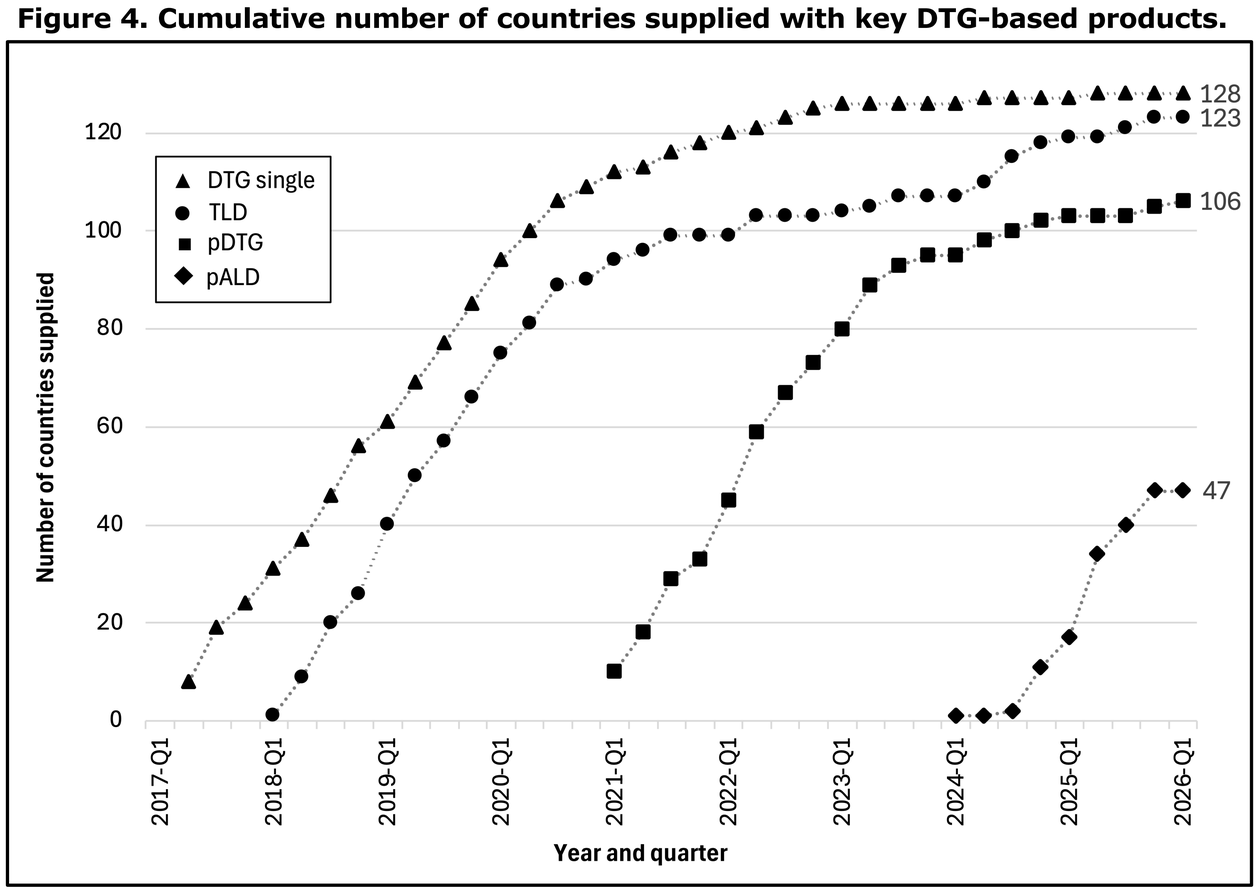


Figure 4. Cumulative number of countries supplied with key DTG-based products.



Discussion – *What the progress was following 2025 disruptions*

Adult **TLD** and **DTG single** product supplies have together increased (+10%) in 2025 vs 2024. Paediatric formulations also increased (+52%), with **pALD** supplies having seen a 9-fold increase between 2024 and 2025 and with **pALD** now surpassing **pDTG** supplies since Q1-2025, marking an important milestone in the **pDTG**-to-**pALD** transition.

Despite disruptions to HIV funding in 2025, data do not clearly show reductions in supply for adult DTG-based products. While a downward trend is visible for **pALD** in the last three quarters, **Figure 3's insert** shows that the sum of **pDTG** + **pALD** supplies over these quarters remains slightly above the **pDTG** average supply volume prior to **pALD** introduction, with similar cyclical variations (as also seen for **TLD**). This data is generally reassuring, although supply-side volumes may not fully reflect known in-country disruptions since Q1-2025. Changes may also be masked by funding and tender cycles, or stockpiling effects. Upcoming data for the rest of 2026 will help assess any delayed impact on DTG product supplies.

Conclusions – *What this is all about*

MPP's unique dataset on key DTG-based products, quarterly obtained from MPP licensees, provides a wealth of information on their pricing and supply volumes. Selected insights from this dataset are presented, showing price reductions as rollout progresses in terms of volumes supplied, countries reached, and – most importantly – people living with HIV able to access optimal HIV treatment. Another MPP poster presented at AIDS 2026 [TUPEF635] maps the landscape of MPP-licensed non-TLD first-line HIV treatment options newly recommended by WHO.

Further exploring MPP strategic information

Detailed information on the registration and rollout of MPP-licensed medicines – including some of the information presented in this poster, is available through MPP's Access Pathways and Lifecycle Tracker database **AccessPaL** (https://accesspal.org). Additional MPP strategic information databases provide data on the patent and licence landscape of essential medicines (**MedsPaL**, https://www.medspal.org) and on technical characteristics, patents, clinical trials, and regulatory filings and approvals of long-acting therapeutics (**LAPaL**, https://www.lapal.ch).

AccessPaL – Access Pathways and Lifecycle Tracker
MedsPaL – The Medicines Patents and Licences Database
LAPaL – The Long-Acting Therapeutics Patents and Licences Database

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