

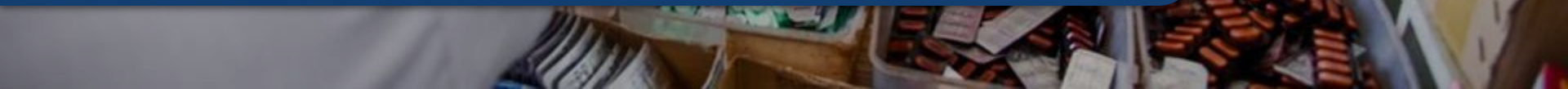


FRIENDS  
OF THE GLOBAL FIGHT

AGAINST AIDS,  
TUBERCULOSIS  
AND MALARIA

# Market Shaping

How the Global Fund is Saving Lives  
and Delivering on the Future of Health



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# **Market Shaping: Purpose and Impact**

# The Challenge: Access to Health Innovation for All

Millions of people, especially in low- and middle-income countries, still **lack access to essential health products**.

**High costs, fragmented markets, and inefficient supply chains** create barriers to health innovation.

In a time of constrained health funding, it is vital to find ways to **make every dollar go further**.



# Meeting the Challenge: Market Shaping

Market shaping is a set of interventions the Global Fund partnership uses to make health products more affordable, accessible and reliable in low- and middle-income countries.

## AFFORDABILITY

- ✓ Drives sustainable pricing and availability for new and essential health products
- ✓ Offers a cost-effective investment during resource-constrained periods
- ✓ Reflects country realities for future incorporation into national programs

## ACCESSIBILITY

- ✓ Increases access to new and essential health products
- ✓ Stabilizes and supports supply chains for consistent, timely, and safe delivery
- ✓ Facilitates accelerated and sustainable market entry

## RELIABILITY

- ✓ Assures product quality
- ✓ Strengthens health systems
- ✓ Incentivizes innovation for neglected diseases





# How Market Shaping Works

Market shaping overcomes systemic market inefficiencies that drive up prices and limit access to critical health products.

## Global Health Ecosystem

Competition for global health dollars forces governments, donors, and companies to make tough decisions about investing in health products.

## Market Forces \*

As a result, free markets often fail, take too long, or need to be built to deliver essential health products where they're needed most.

## Human Impact

This prohibits too many people from accessing affordable, high-quality medicines, diagnostics and prevention tools—contributing to lost lives and livelihoods.



Market shaping fosters partnerships to remove market barriers, such as:

Prohibitive pricing

Market fragmentation

Lack of information sharing

Low production capacity

Inefficient supply chains

Limited investment in products designed for low- and middle-income countries





# **Global Fund's Market Shaping Approach and Case Studies**

# The Global Fund's Unique Role in Market Shaping

As the largest financier of HIV, TB and malaria programs in low- and middle-income countries, the Global Fund leverages its scale to secure improved supply terms, ensure supply reliability, and foster innovations that are accessible to all.



## How the Global Fund Drives Impact



A country-first approach that reflects national contexts and prioritizes integration



A partnership model that ensures close collaboration across a range of partners



An unmatched ability to scale innovations rapidly and drive sustainable solutions



# Improving Access Through the Global Fund Partnership

Collaboration with countries, funders, and product developers lowers prices, drives demand, and increases access.

## EXAMPLES OF MARKET SHAPING LEVERS



The Global Fund's pooled procurement platform supported **procurement for 81 countries** with a total value of **\$1.34 bn in 2023**.



The Global Fund's Revolving Facility helped **enable scaled introduction of new, more effective health products**, including dual active ingredient insecticide-treated bed nets, which help protect children and communities from malaria.



The Global Fund's Access Fund will provide **co-payments to countries to accelerate the introduction of quality-assured products**. It will first be used to support the diversification of malaria treatments, which is critical to delay the spread of drug resistance.

# Making the Most of Every Dollar to Save Lives

The Global Fund is focused on shaping and maintaining healthy product markets through its work on end-to-end supply chains. With the express purpose of developing sustainable markets, the Global Fund and partners achieved affordable prices for HIV, TB and malaria products, enabling countries to expand coverage and invest resources into other health priorities.

Market shaping has contributed to the 65 million lives saved by the Global Fund partnership.



## HIV

**99%** price reduction of antiretroviral medicine over the past 20 years

**25%** price reduction of the preferred first-line treatment in 2023



## Malaria

Secured **new bed nets** (dual active ingredient insecticide-treated) at **comparable price** to conventional nets

Achieved **80%** reduction in timeline from quality assurance to scaled use



## TB

**55%** price reduction of the main treatment for drug-resistant TB in 2023

**30%** price reduction of short course preventative treatment

**20%** price reduction of diagnostic test cartridges

## CASE STUDY 1

# Expanding Access to Better Bed Nets

Although insecticide-treated bed nets have been a cornerstone of malaria prevention, the emergence of pyrethroid resistance threatens their effectiveness and endangers the lives of young children across sub-Saharan Africa.

Dual active ingredient insecticide-treated nets, incorporating two different insecticides, offer an effective solution to combat resistance and protect people from this devastating disease.

However, intervention through the New Nets Project was critical to accelerate availability and secure affordability of these nets.



## CASE STUDY 1



# Expanding Access to Better Bed Nets

Market shaping accelerated the development and introduction of dual active ingredient nets. The unmatched scale of the Global Fund partnership ensured they reached people in need.



### Partner-centered model

**2018**

Unitaid and the Global Fund established the \$66M New Nets Project, led by the Innovative Vector Control Consortium, to address **critical barriers to market entry**

**2019**

The Gates Foundation and MedAccess executed a **volume guarantee** for second-generation long-lasting nets

**2021**

Continuing catalytic support beyond the New Nets Project, the Global Fund supported early access to these nets using a **copayment mechanism** in advance of WHO recommendation



### Country priority focus

**2022**

Final trial completed in insecticide-resistant areas in Tanzania and Benin, **showing ~44% reduction in malaria incidence** compared to standard (single active ingredient) nets



### Scale innovations rapidly

**2023**

**WHO recommended** scale-up of dual insecticide-treated bed nets

**The Global Fund** accelerated availability through the Revolving Facility, using volume guarantees to **rapidly scale net use in-country**

## IMPACT 2019-2022

**13M**

malaria cases averted

**24K+**

lives saved

**\$28.9M**

in financial savings to health systems

**2x**

the speed of country rollout compared to standard nets



**56 million +**

dual active ingredient nets distributed across 17 countries through 2023

2018

2022

2023

## CASE STUDY 2

# Accelerated Transition to a New First-line Treatment for HIV

WHO's recommendation of dolutegravir-based regimens marked a major advancement in HIV treatment. The combination pill for adults, TLD, rapidly suppresses the virus, has fewer side effects, and a high barrier to resistance.

Market shaping by partners across the global health ecosystem secured an affordable price for quality-assured TLD and sufficient, secure supply at market entry.

This accelerated access for millions of people to a better first-line treatment.



## CASE STUDY 2

# Accelerated Transition to a New First-line Treatment for HIV through Global Fund and its partners



### Partner-centered model

The Global Fund and its partners—including Unitaid, CHAI, WHO, and PEPFAR—radically reshaped the market for TLD by:

- **Pooling orders across countries** to lower prices through higher purchase volumes
- **Negotiating a 'ceiling price'** or maximum price suppliers could charge
- **Enabling generic manufacturers** to join the market through licensing agreements



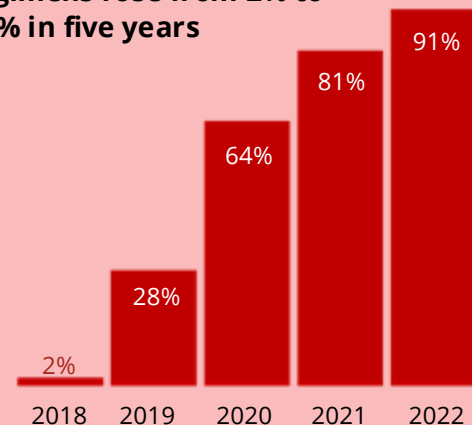
### Country priority focus

- **Accelerated introduction** of a new regimen at unprecedented scale
- **Achieved price reductions to ≤\$40 per person per year**, a reduction from the 2017 ceiling price of \$75
- **Tripled the number of suppliers** for first-line HIV treatments to increase supply security and price competition



### Scale innovations rapidly

The proportion of adults taking dolutegravir-based regimens rose from 2% to 91% in five years







# **Future-Proofing Health**

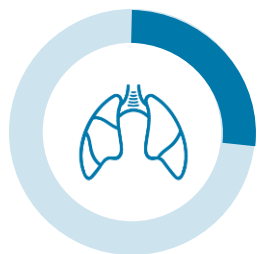
# Ending AIDS, TB and Malaria Has Never Been More Urgent

The world is off track to end AIDS, TB and malaria by 2030. Far too many people die from these diseases because they lack access to health products that could save their lives.



**2030 goal:** Reduce AIDS-related deaths by 80%

**630,000 people** died from AIDS in 2023, a **47% reduction** from 2010



**2030 goal:** Reduce TB deaths by 90%

**1.3 million people** died from TB in 2022, a **25% reduction** from 2015



**2030 goal:** Reduce malaria deaths by 90%

**608,000 people** died from malaria in 2022, a **28% increase** from 2015

ARV treatment coverage



22% **78%** 95%

TB treatment coverage



45% **70%** 90%

Insecticide-treated bed net coverage



30% **57%** 100%

That millions remain at risk is a failure of equity. Tools exist to prevent, diagnose and treat these diseases, but more must be done to ensure they are accessible to people in need.

# We Must Act Quickly Before the Challenge Becomes More Complex and Costly

## How Climate Change Is Intensifying Dangerous Diseases



## Scientists warn of a new invasive mosquito species in Africa

### 40 million deaths by 2050: toll of drug-resistant infections to rise by 70%

By 2050, around 2 million people – the majority aged over 70 – could die from drug-resistant infections each year.

By Miryam Isidori



## World falling behind on environment, health and hunger goals, UN report says

By Reuters

June 16, 2024 11:50 PM EDT Updated 3 months ago



## UNAIDS: Rising debt in sub-Saharan Africa costing lives



## On the Frontline of Climate Crisis, World's Most Vulnerable Nations Suffer Disproportionately

### Antibiotic resistance could cause over 39 million deaths by 2050, study says

Researchers have long flagged antimicrobial resistance as a public health concern, but this study is the first to analyze such trends around the world and over time.



## Urgent action needed as malaria resists key drug

# New Innovations Can Transform Health – If They’re Affordable and Accessible

Global goals for 2030

Pipeline of innovations that can be made more affordable, accessible and reliable through market shaping

Potential health impact

Reduce **AIDS**-related deaths by 80%

Long-acting prevention tools

Long-acting treatment

Platform-based diagnostics

Gene therapy

**Drive down new HIV infections and AIDS deaths** by introducing new long-lasting prevention and treatment options that don't require a daily pill.

Reduce **TB** deaths by 90%

AI-enabled chest X-Rays

Point-of-care molecular diagnostics

Pan-TB treatment regimen

TB vaccine for adults

**Close the gap of millions of people who don't know their TB status and don't receive care** through simplified diagnostics and treatments.

Reduce **malaria** deaths by 90%

Monoclonal antibodies

Single-encounter radical cure

Durable, all-ages vaccine

Gene drive mosquitoes

**Help countries accelerate progress toward malaria eradication** through new tools that stay ahead of the parasite's ability to develop resistance.

A smiling woman in a green and white sari is holding hands with several children in a classroom. The walls are decorated with colorful educational posters and drawings. The scene is brightly lit, suggesting a positive and engaging learning environment.

## Supporting the Global Fund Is An Investment In Future-Proofing Health

Now is the time for the world to step forward, not back, and fully fund the Global Fund to do its life-saving work.

An investment in the Global Fund is an investment in making good health **more affordable, easier to attain, and more equitable** for people everywhere.

**Ending the HIV, TB and malaria epidemics is within reach**, if we improve access to the health tools of today and rapidly scale the innovations of tomorrow.

The Global Fund and its partners are best positioned to meet this moment – to **save millions of lives and build a healthier future**.





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# Thank you