



health

Department:
Health
REPUBLIC OF SOUTH AFRICA



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Affordable Medicines Directorate





SOUTH AFRICAN CONTEXT



health

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60 million
the population of
South Africa



+4,500
health
establishments in
the public sector

**4.6
million**
diabetics

84%
of population
dependent on
public health

\$1,4 billion
Public Health
Medicine budget

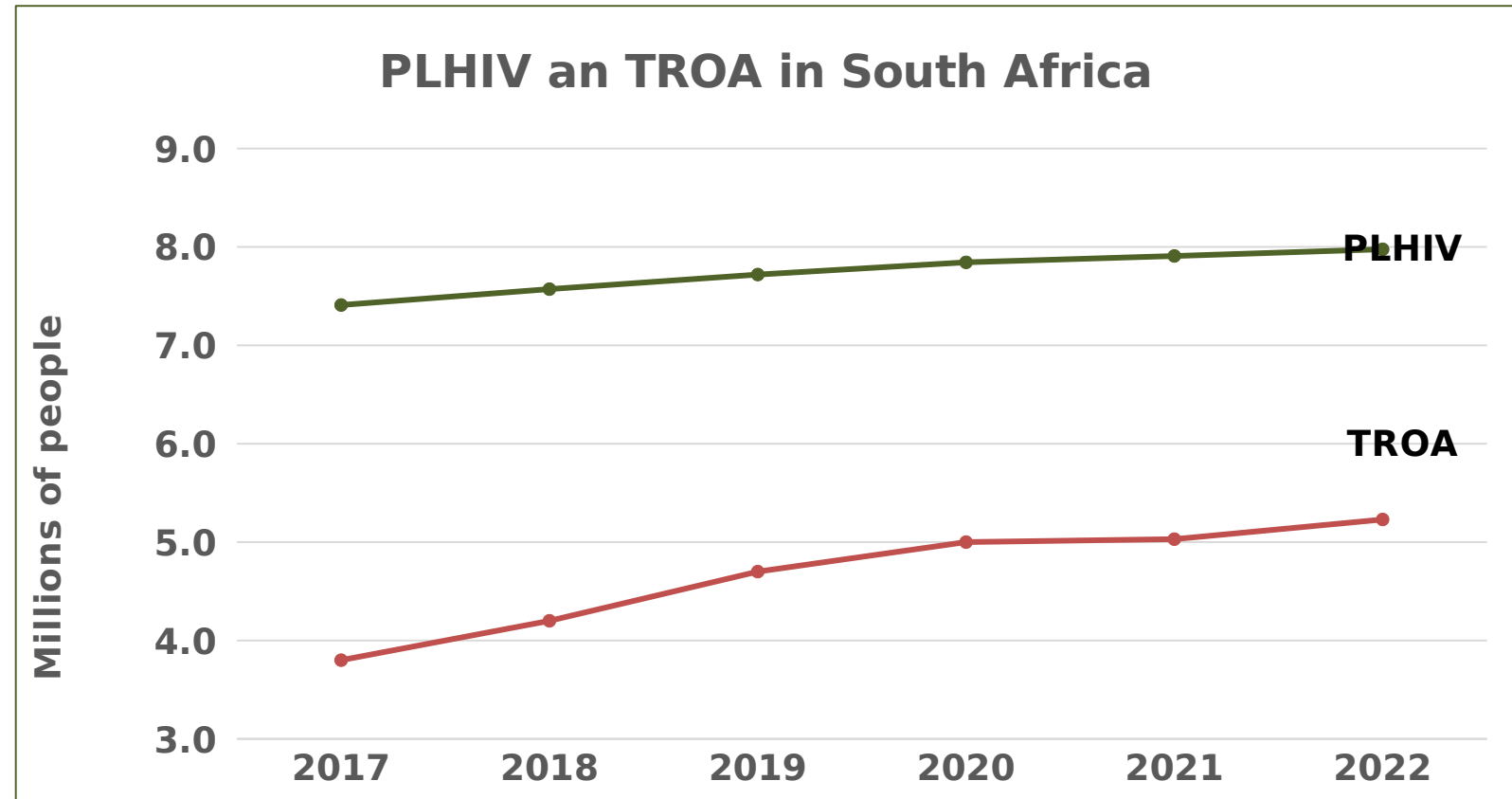
8,5%
of GDP spent on
health care

8 million
Population living
with HIV

**5,59
million**
patients receiving
treatment for HIV



COVID-19 did impact our client (patient) numbers, but we are seeing some recovery in 2022



Note

- TROA = Total remaining on ART
- TROA data on graph excludes private sector
- PLHIV from Thembisa 4.5 model

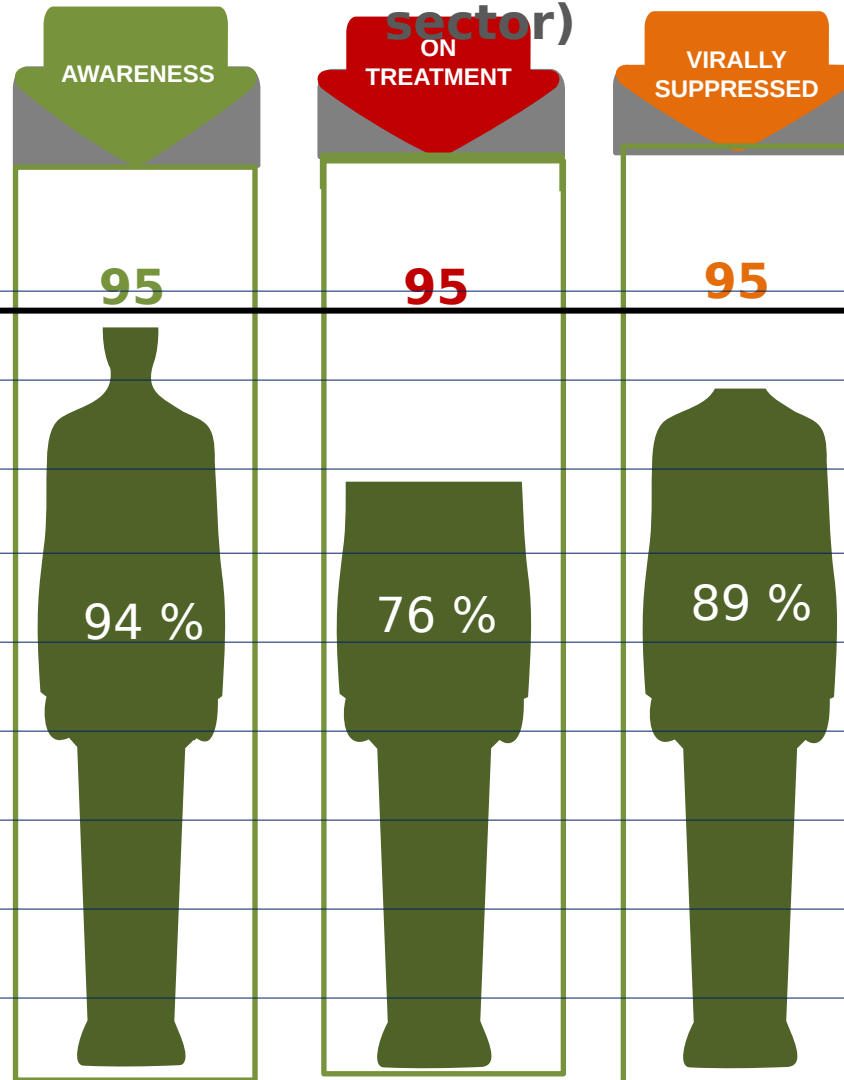
The 95-95-95 target requires significant effort to transition awareness into treatment



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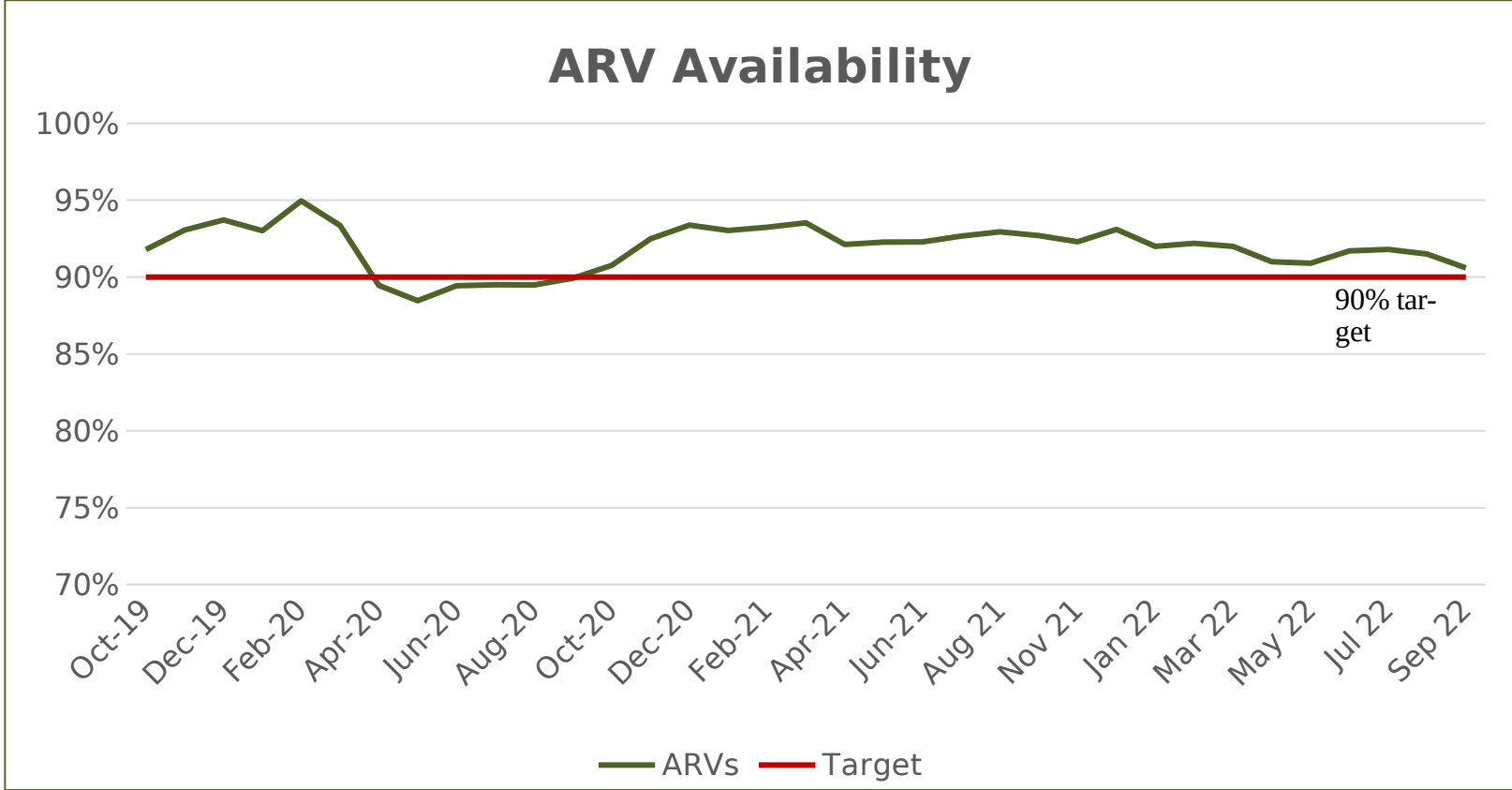
95-95-95 Target vs Actual (Public & Private sector)



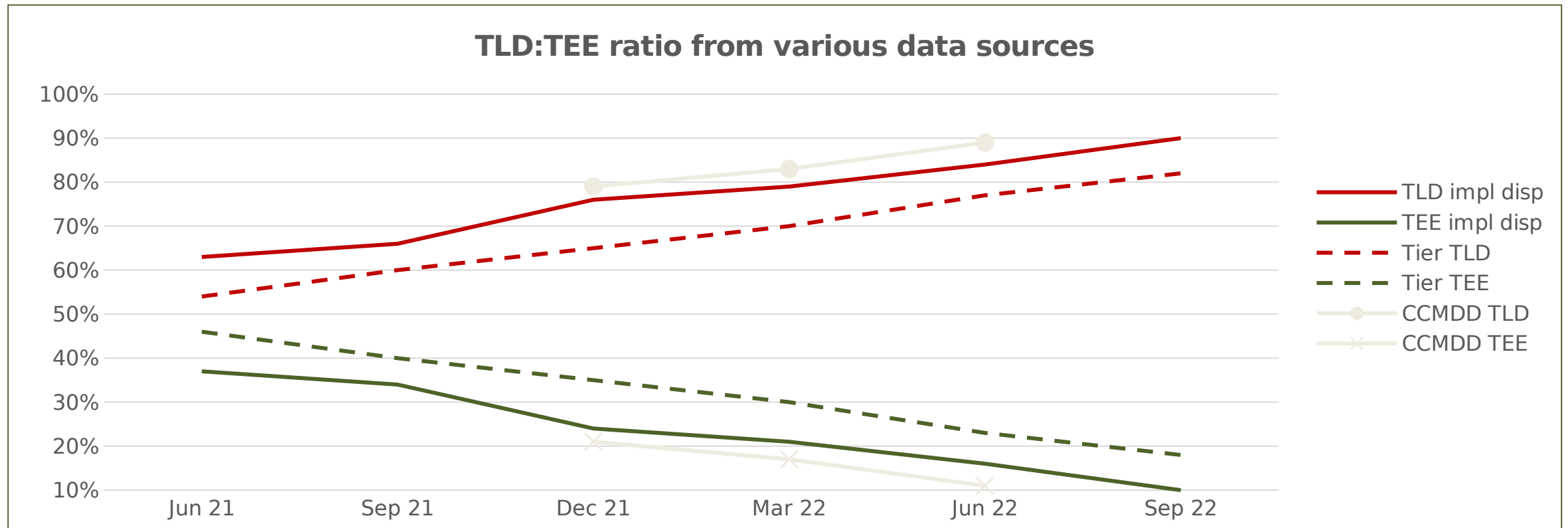
Target 

- **AWARENESS:**
- Status is strong, at 94%
- **ON TREATMENT:**
We need to add 1.5m clients treatment to meet the “2nd-9”
 - ~700k men
 - ~700k women
 - ~90k children

ARV availability has been restored at >90%, since COVID-19



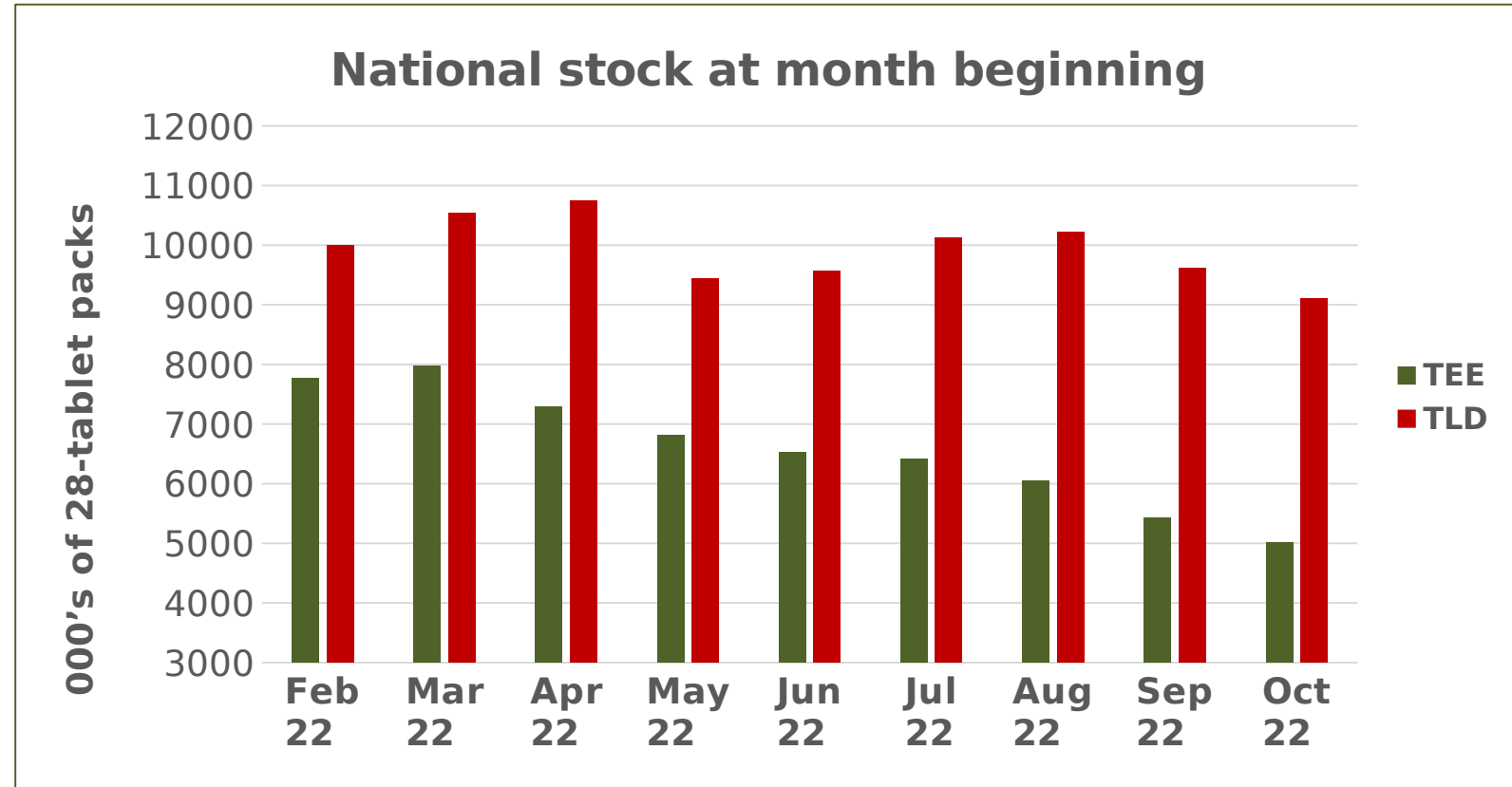
TLD transition is continuing, with all data points indicating good progress over the past year



Note

- CCMDD is our chronic medicines distribution that serves ~2m clients on ARV, who receive their medicines by a more convenient distribution channels
- Implied dispensing based on stock movement in provinces and amount supplied from suppliers
- TIER data is facility-level data at patient level

TLD stock remains strong, while TEE is being managed down



Note

- TLD stock at 2-3 months of over, and will be boosted by “buffer stock” deliveries over the coming months
- TEE stock levels are high (~6 months)
- Source: NSC and depot feedback; Includes stock reported at CCMDD service providers, hospitals and facilities



The 2022-25 ARV tender generated significant price red

Short name	Price at award (ZAR)	Apr'22 pricing (ZAR)	Variance
DTG50	27.08	57.29	-52.7%
ABC/3TC 600/300	106.34	166.44	-36.1%
TLD 28s	68.09	99.02	-31.2%
ABC 60	37.62	50.92	-26.1%
ABC 240ml	62.54	83.36	-25.0%
TE	52.45	68.71	-23.7%
TEE 28s	79.54	102.65	-22.5%
AZT/3TC 300/150	79.47	98.28	-19.1%
AZT 100	54.34	66.20	-17.9%
3TC 150	28.84	35.04	-17.7%
EFV 600	39.08	46.89	-16.7%
LPV/r 100/25	66.05	76.60	-13.8%
TDF 300	35.30	39.99	-11.7%



Treat growing patient numbers in a fiscally constrained environment



Recent developments



ARV GUIDELINES

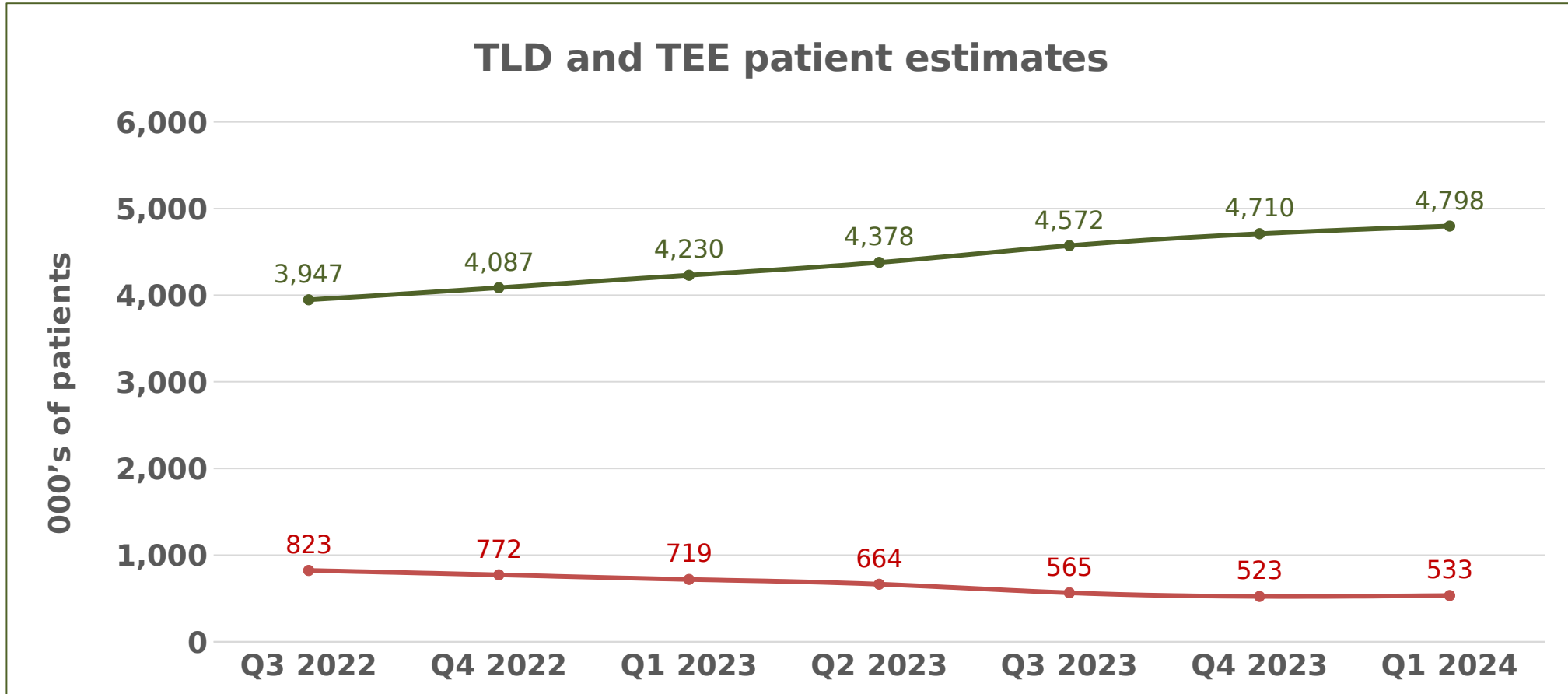
Review and update of
guidelines underway



MULTI-MONTH DISPENSING

- Already offered on a smaller scale
- Provinces working on plans to make available at scale
- Use of 84/90s will be closely monitored

Adults on TLD and TEE

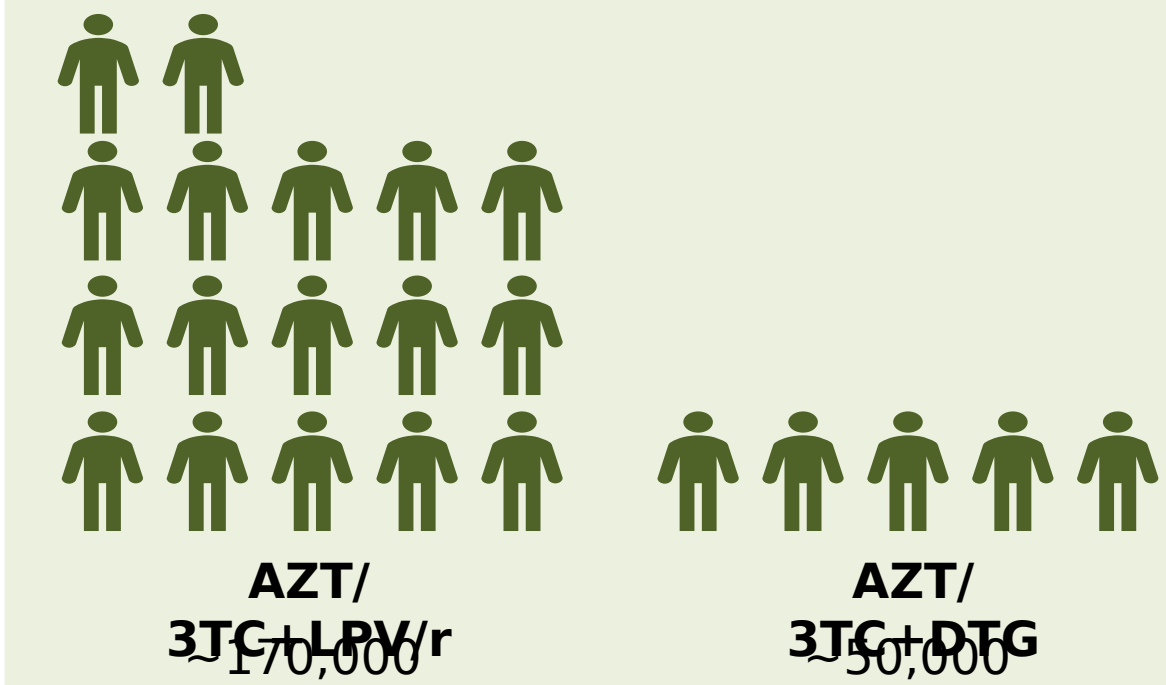


Regimen trend: 2nd line adults

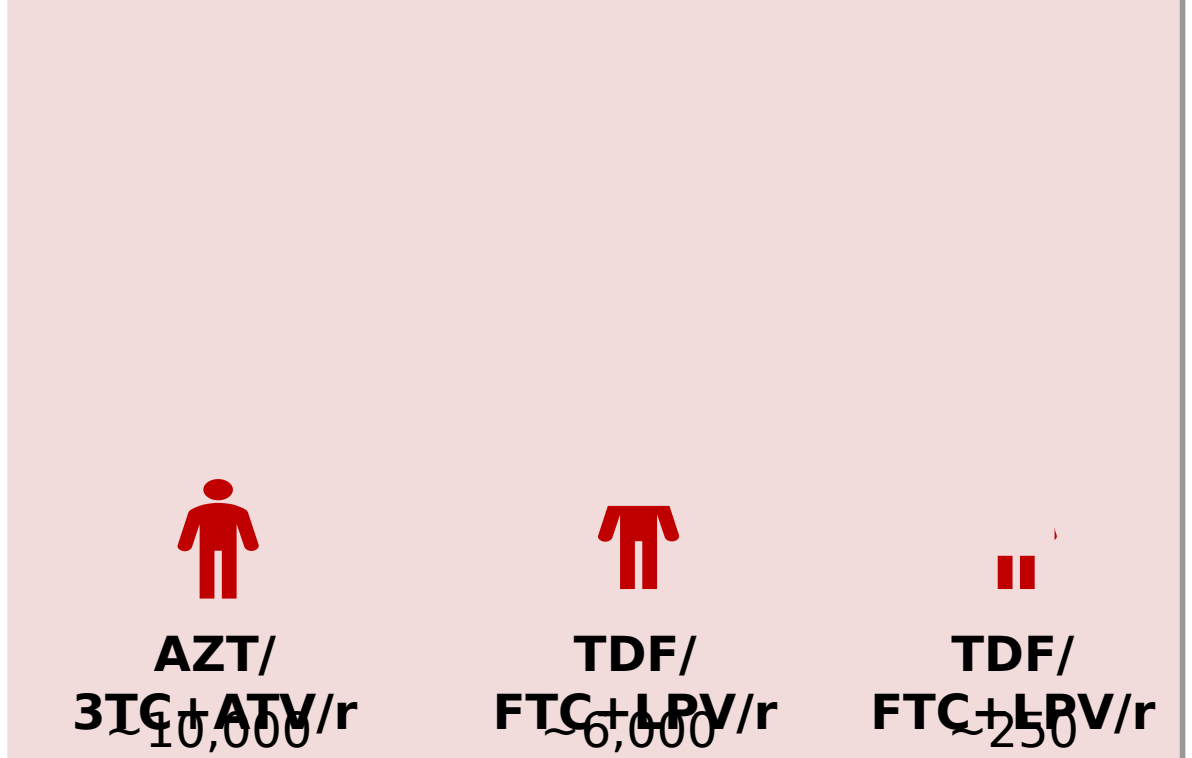


 Represents ~10,000

LPV/r volumes expected to reduce, based on clinician adherence to communication from HIV Programme on 2nd line patient transition to DTG 50



Stable volumes expected



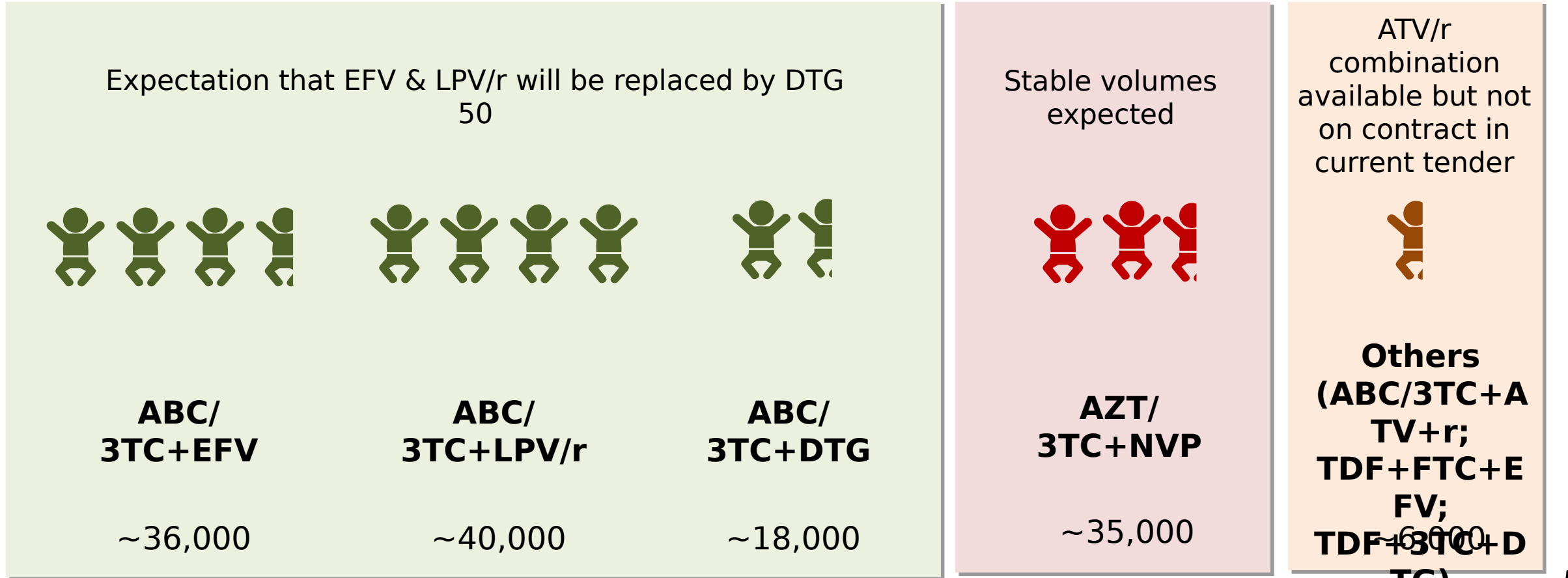
Total = ~240,000

- Note**
- LPV/r and DTG clients numbers based on TIER.Net data for Jun'22
 - Estimates used for other regimens listed
 - Total DTG50 usage across all clients is estimated at 150-200k packs per month, although splits between TB booster, 1st line, 2nd line not available

Regimen trend: 1st line children



 Represents ~10,000



Total = ~135,000

Medicine Availability: All medicines

Supply Chain Medicine Availability



Overall Medicine Availability



FILTERS & INFORMATION:

Min or Total Basket
Min. Basket

Select Facility Type
All

Select Category
All

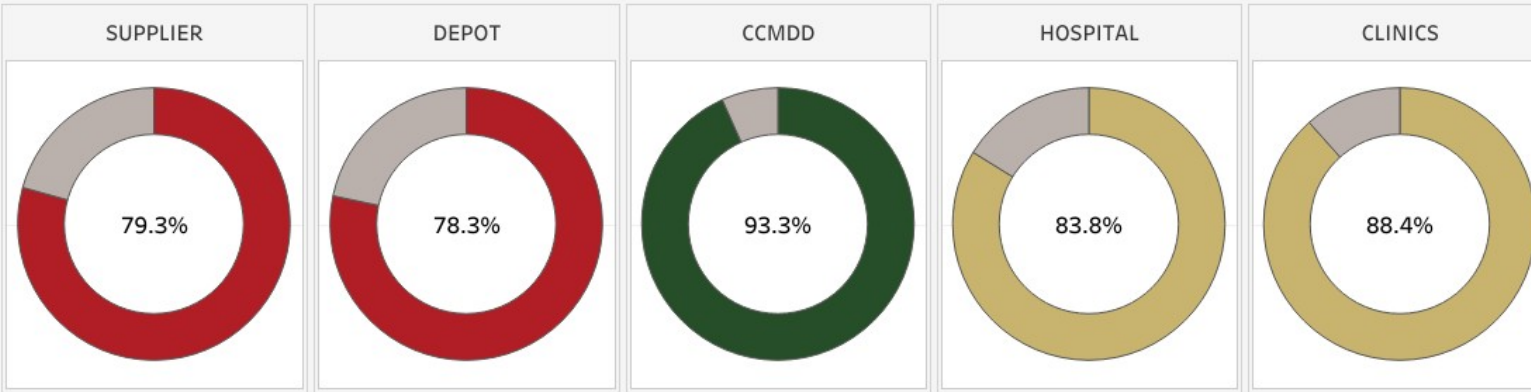
Select Item
All

Select Data Source
All

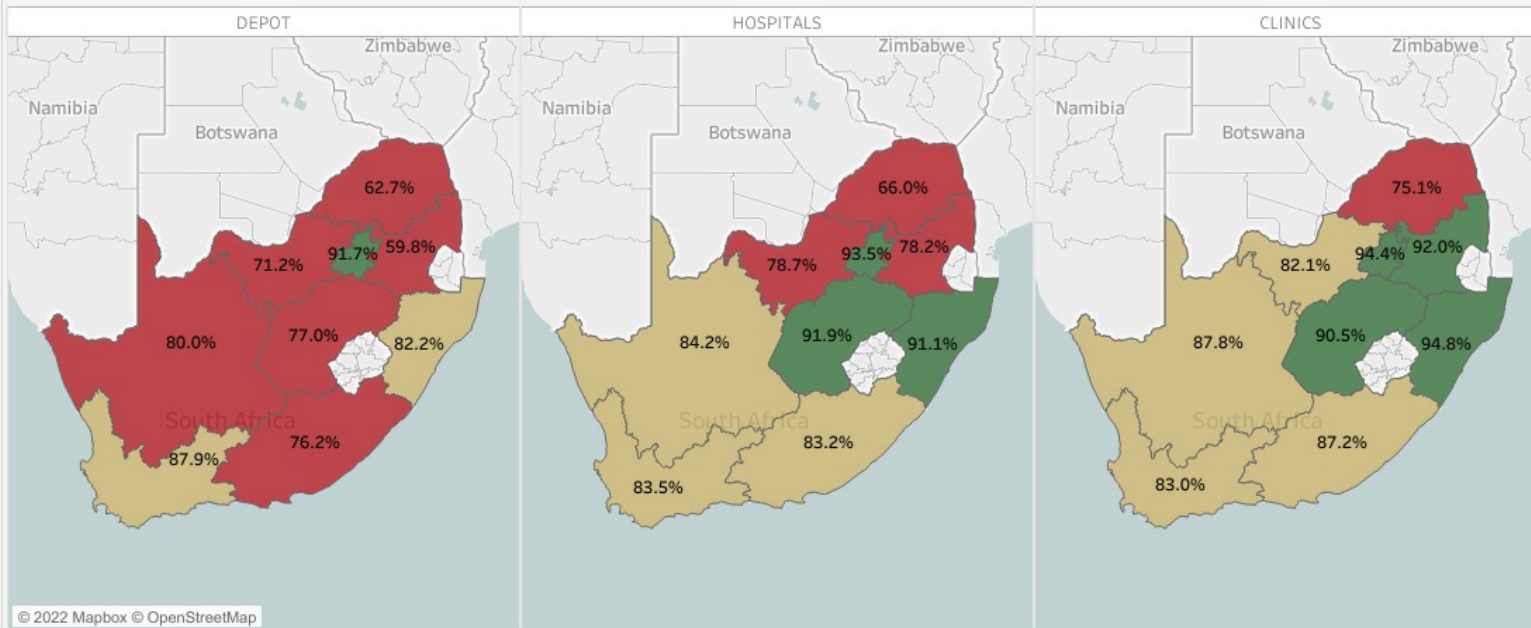
Legend:
Medicine Availability

90-100%	■
80-90%	■
< 80%	■

By Supply Chain



By Province



Medicine Availability: ARVs

Supply Chain Medicine Availability



Overall Medicine Availability



FILTERS & INFORMATION:

Min or Total Basket
Min. Basket

Select Facility Type
All

Select Category
ARV Therapy

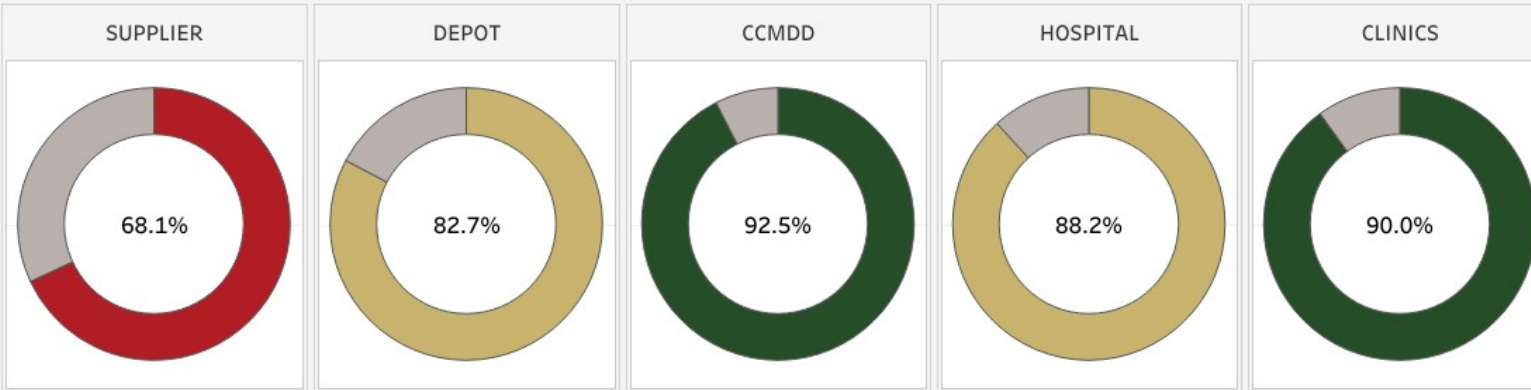
Select Item
All

Select Data Source
All

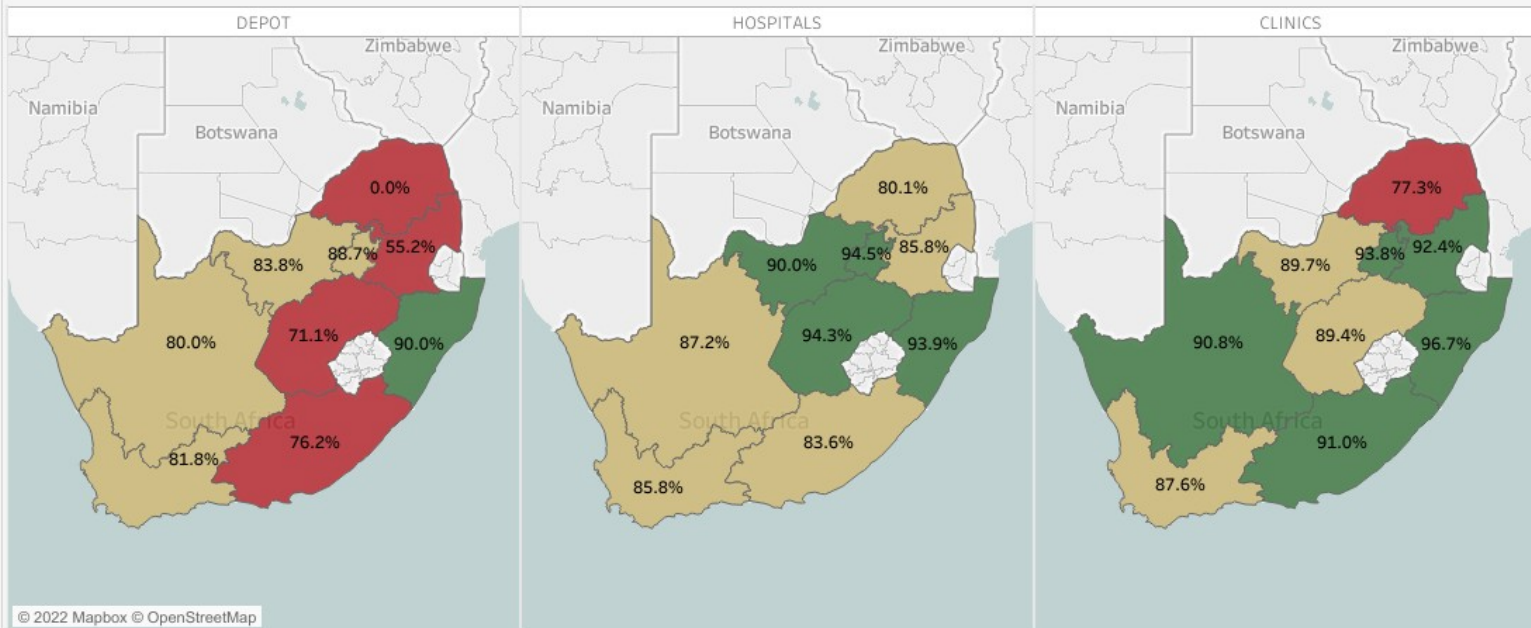
Legend: Medicine Availability

90-100%	■
80-90%	■
< 80%	■

By Supply Chain



By Province



Supply Chain Medicine Availability



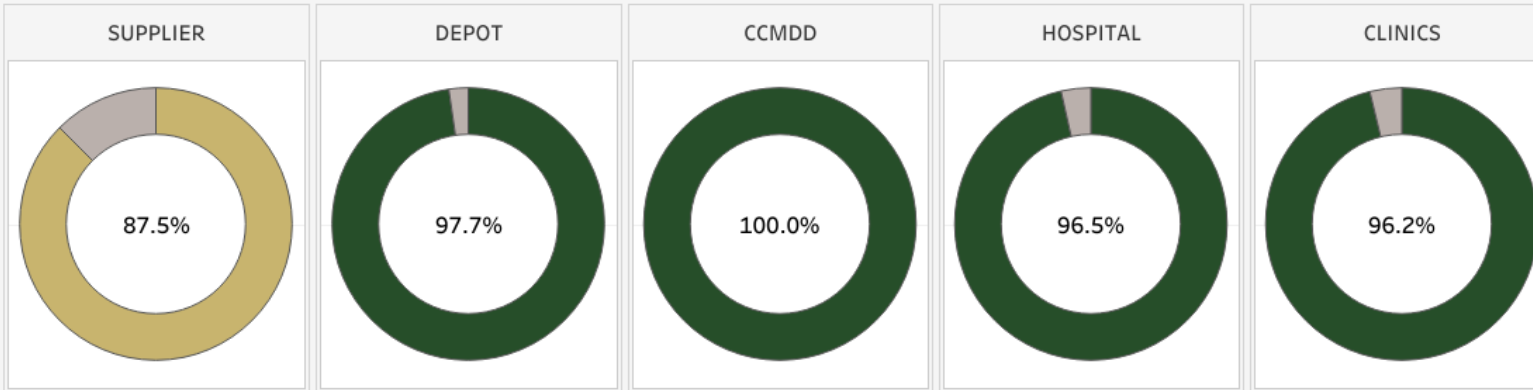
Overall Medicine Availability



FILTERS & INFORMATION:

Min or Total Basket
Min. Basket

By Supply Chain



Select Facility Type
All

Select Category
ARV Therapy

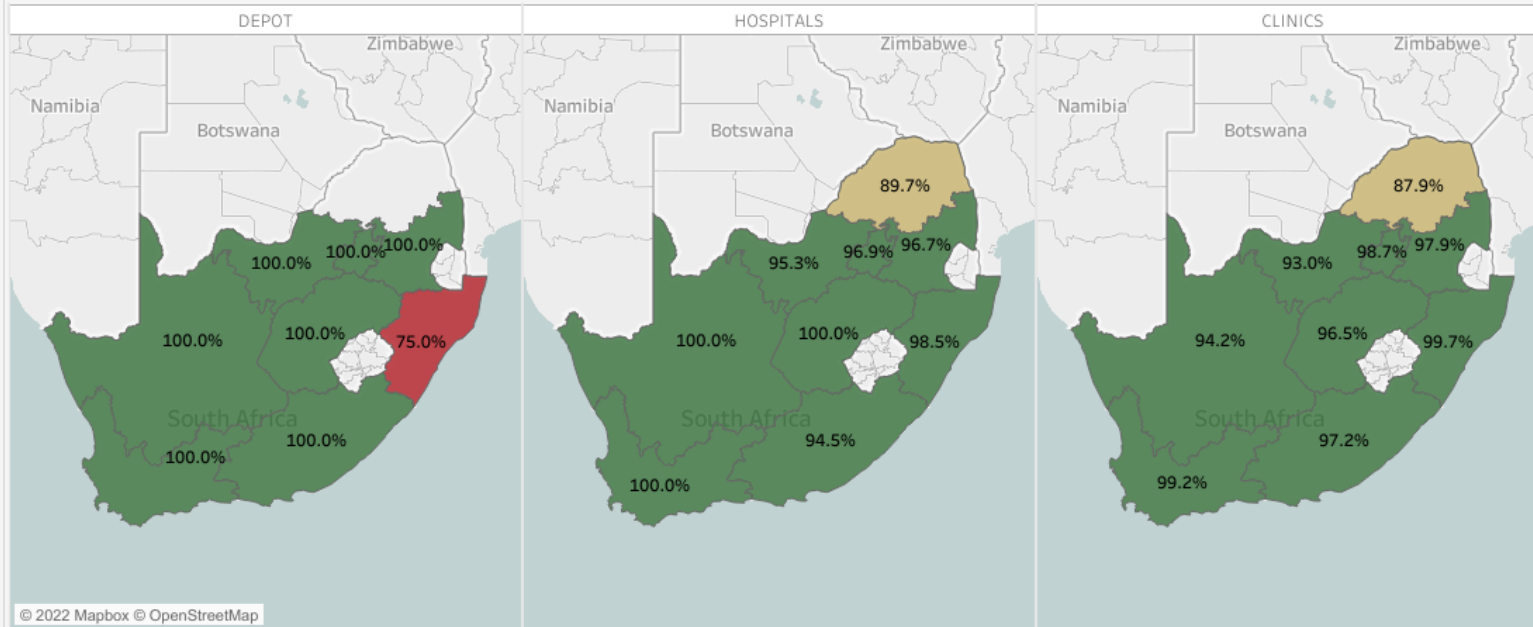
Select Item
Multiple values

Select Data Source
All

Legend:
Medicine Availability

90-100%	■
80-90%	■
< 80%	■

By Province



Conclusion



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- Still room for significant client and ARV **medication growth** in South Africa.
- **Successful tender** creates the ability to serve more clients inside the same budget envelope.
- **Accurate information on patient numbers** per regimen remains a challenge, but we will work with suppliers to ensure availability.
- **Looking forward to stronger relationships and continued innovation for the benefit of our patients**



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Thank you

