
Procuring HIV Diagnostic Tools

Manufacturers, implementers and agencies

Market share of HIV RDT products

31 January 2012

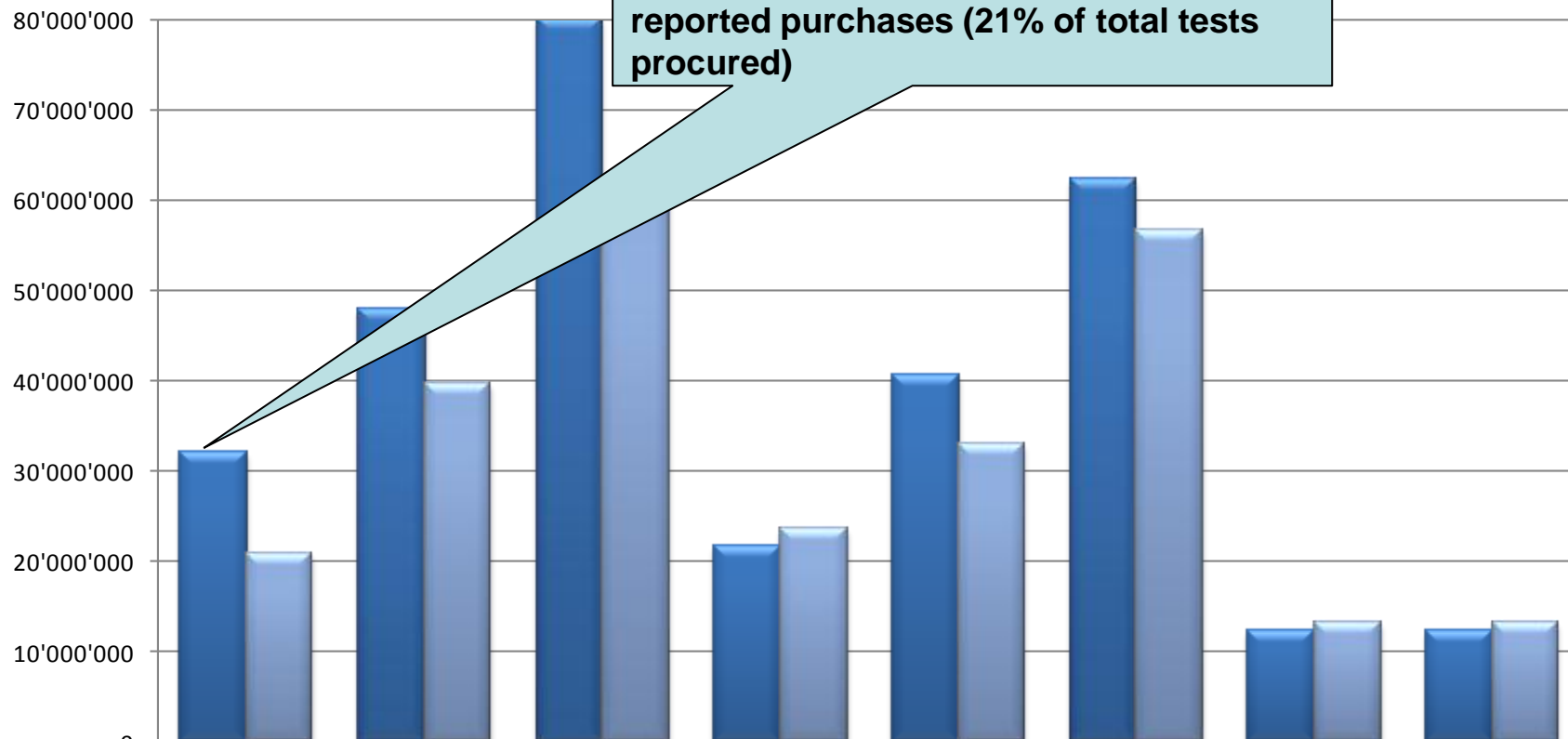
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Objective

- Provide a market analysis of procurement data for HIV Rapid Diagnostic tests (RDTs)
 - By country
 - By manufacturer
 - By product
- Scope and Method
 - Analysis of HIV RDT procurement 2009 - 2011
 - Data sources included:
 - Global Fund (GF) Price and Quality reporting Mechanism (PQR)
 - WHO Global Price Reporting Mechanism (GPRM)
 - Focus on Global Fund PQR in 2010-2011

Total \$US and volume of HIV RDTs Procurement reported to Global Fund and WHO GPRM

2009: India's reported purchases accounted for 54% of all Global Fund reported purchases (21% of total tests procured)



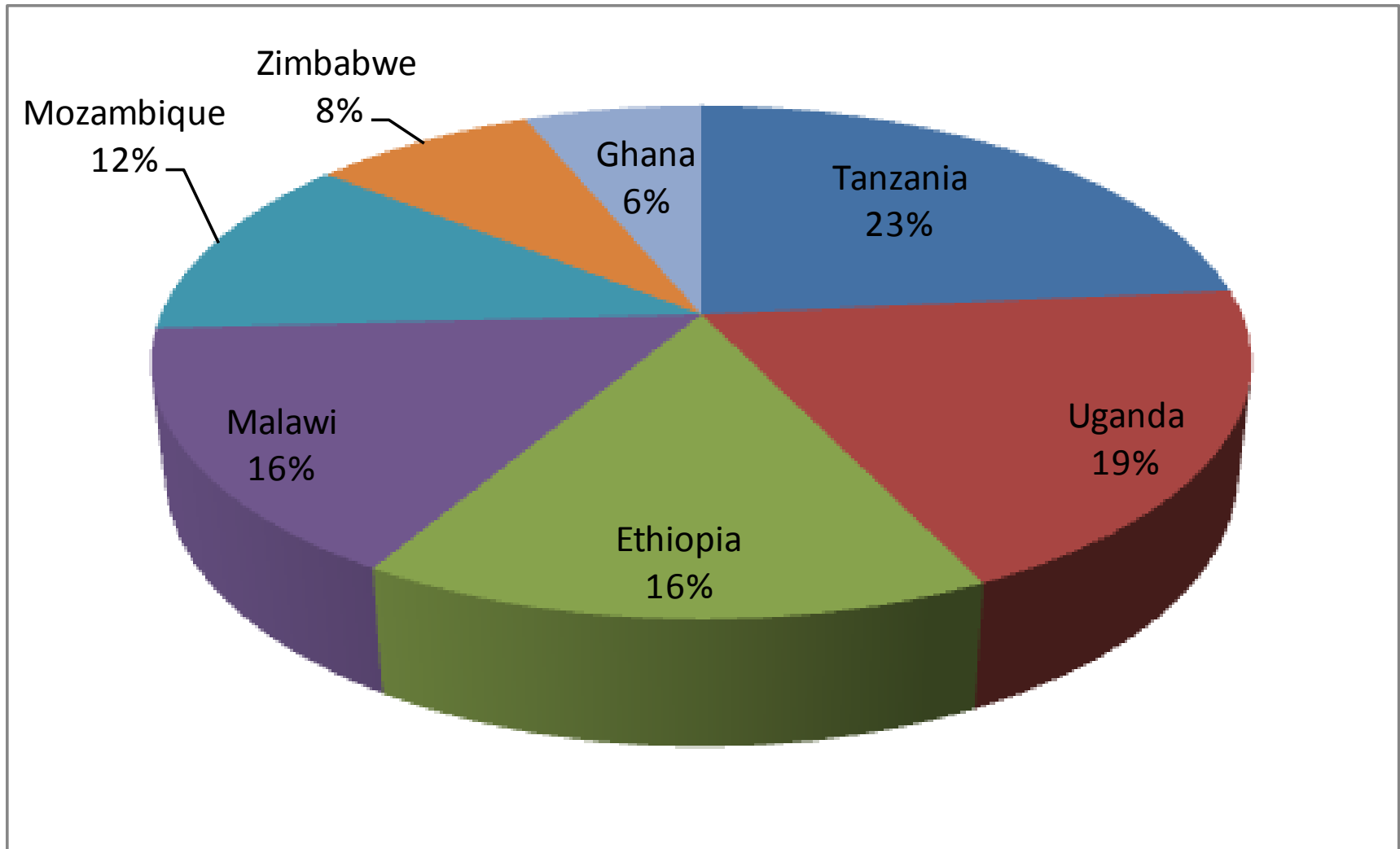
	2009 GF	2009 WHO	Total 2009	2010 GF	2010 WHO	Total 2010	2011 GF	Total 2011
# of Tests	32'202'195	47'993'655	80'195'850	21'786'880	40'628'585	62'415'465	12'341'986	12'341'986
\$US	\$20'831'400	\$39'709'185	\$60'540'585	\$23'613'992	\$32'985'603	\$56'599'595	\$13'210'694	\$13'210'694

Analysis of HIV RDT reported purchases to GF PQR and WHO GPRM

- Total number of HIV RDTs ranged from 80 million tests in 2009 dropping to 12 million tests in 2011
 - WHO GPRM data for 2011 shows \$8.7 million revenue but no corresponding test numbers
 - Assuming an ASP of \$0.95, # of tests for 2011 can be estimated at \$8.2 million, bringing 2011 total # of tests to 20 million
 - Global Fund PQR data for 2009 shows 54% of tests reported procured were from India at a price of \$0.31/Test
 - Subsequent years do not reflect the same procurement levels for India
- Focus of this analysis on 2010-2011, with implementation of Global Fund Quality Assurance Policy for Diagnostics

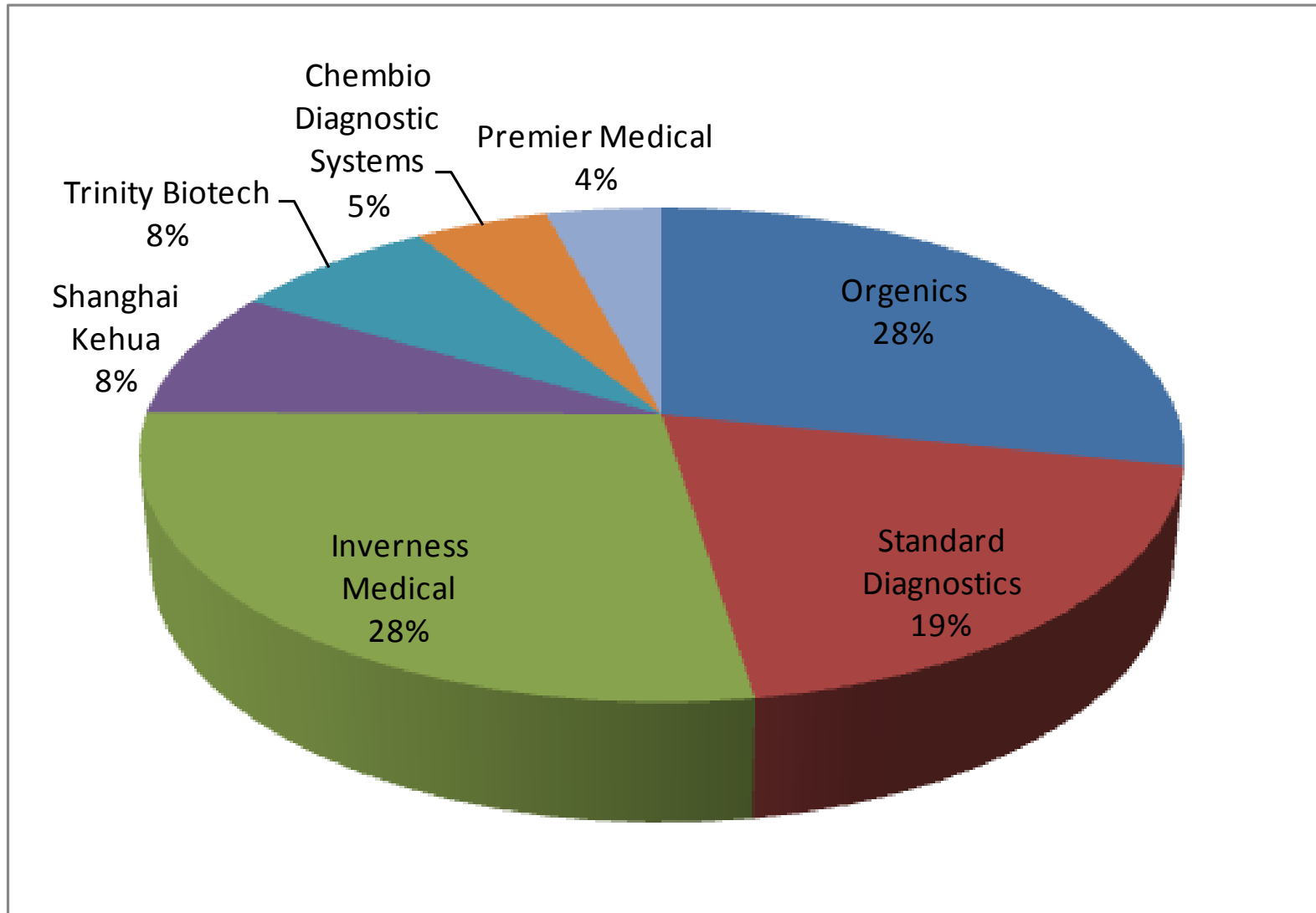
HIV RDTs 2010-2011

Top 7 countries in reported purchases to GF



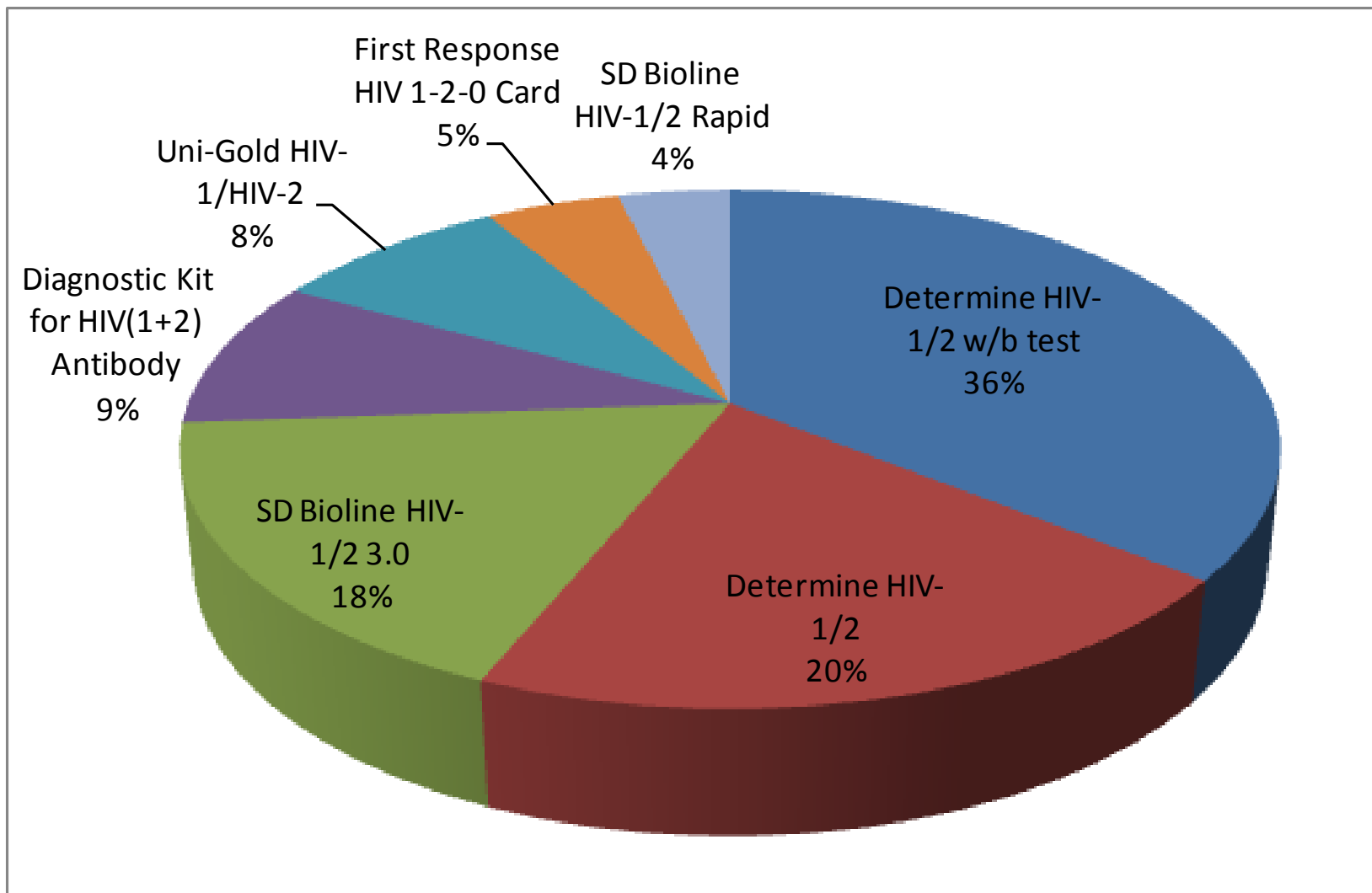
HIV RDTs 2010-2011

Top 7 Manufacturers in reported purchases to GF



HIV RDTs 2010-2011

Top 7 Products in reported purchases to GF



Analysis of HIV RDT reported purchases to Global Fund PQR

- Top 3 HIV procured RDTs in 2010-2011 were:
 - Determine HIV-1/2 and Determine HIV-1/2 WB test by Inverness (Alere) (also sold by Orgenics)
 - SD Bioline HIV-1/2 3.0 by Standard Diagnostics
 - Diagnostic Kit for HIV by Shanghai Kehua
- HIV RDT median price per test ranges from \$1.08 in 2010 to \$1.07 in 2011

Analysis of HIV RDT reported purchases to Global Fund PQR

- 45% of HIV RDTs procured in 2010 are now WHO prequalified
- 74% of HIV RDTs procured in 2010 have entered the WHO prequalification process or are prequalified
- 75% of HIV RDTs procured in 2011 are now WHO prequalified
- 78% of HIV RDTs procured in 2011 have entered the WHO prequalification process or are prequalified

Final remarks

- Improvements to the PQR have resulted in more accurate reporting of procurement by Grantees, helping to monitor compliance with the policy and market trends
- Since the policy has been implemented, all reported HIV RDTs to the PQR have met the criteria of the Global Fund QA policy
- An increasing number of HIV RDTs are WHO prequalified or under review for prequalification

