Progress update toward adoption of Rectal Artesunate and Injectable Artesunate

Global severe malaria stakeholder meeting
Feb 8th 2022
Agenda

- WHO guideline adoption on Injectable artesunate and Rectal artesunate
- Procurement volumes and prices
- Outlook
In 2019, most countries aligned, or closely aligned with WHO guidance on Rectal Artesunate

19/56 align, 18/56 are unknown, and 19/56 do not align. Out of these 19 that do not align with WHO guidance, 7 include usage of RAS in adults and 11 did not have RAS (1 unclear)

Source: Rectal Artesunate Landscape report, can be accessed here: Rectal Artesunate Landscaping Assessment Report (severemalaria.org)
By 2022, three additional countries aligned...
On Injectable artesunate, majority of countries have guidelines aligned with WHO’s

Source: Injectable Artesunate Landscape report, can be accessed here: Injectable artesunate report.pdf (severemalaria.org)
Available procurement data of Rectal Artesunate and Inj. artesunate show what countries are using RAS

Source: TGF (PQR database which is publicly available) and PMI
Historic procurement volumes of Rectal Artesunate and Inj. artesunate have shown impressive growth in recent years

<table>
<thead>
<tr>
<th>Type</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Injectable artesunate</td>
<td>1.73</td>
<td>1.88</td>
<td>1.86</td>
<td>1.84</td>
</tr>
<tr>
<td>Rectal artesunate</td>
<td>0.49</td>
<td>0.44</td>
<td>0.39</td>
<td>0.40</td>
</tr>
</tbody>
</table>

*Prices based on GF PQR data and PMI costing assumptions from 2021

Source: TGF (PQR database which is publicly available) and PMI
Outlook on Rectal Artesunate and Injectable artesunate (info can be found here: CHAI Forecasting of Global Malaria Commodities | RBM Partnership to End Malaria)

Key assumptions:
- The percentage spend on specific treatments in NFM4 (2023-2025) will mirror the percentage spend in NFM3 (2020-2022), and/or any changes in the next GF replenishment will not impact volumes of treatments procured due to the prioritization by countries in their applications.
- The forecast is focused on donor-funded procurement, with the largest donors for treatments being PMI and GF, which captures >75% of the procurement market for treatments (GF market shaping report 2020).
- Average prices in the Global Fund PQR data are representative of historical pricing for treatments at Global Fund. PMI price estimates are based on cost assumptions and MOPs.
- Injectable artesunate amounts have been normalized to 60mg vials and rectal artesunate suppositories to individual suppositories.
- Rectal artesunate volumes are expected to remain stable in the next one to three years, with the impact of ongoing discussions around recommendations for use most likely to influence shifts in the mid-term (4 years +).
- Rectal artesunate supply will be sufficient to cover demand in the short term.

Key takeaways:
- Injectable artesunate volumes are expected to stay relatively consistent in the short term, due to stable need across years and prioritized funding by countries. Volumes may be expected to reduce in 2023 as countries approach the end of their current Global Fund funding cycle.
- Rectal artesunate suppository numbers are expected to remain relatively stable in the short term, although it should be noted that substantial uncertainty exists around how uptake will progress from 2024. A drop in donor procurement volumes is expected between 2021 and 2022 based on disbursement patterns for countries procuring substantial proportions of RA.

[Graph showing forecasted donor-funded Injectable and Rectal Artesunate procurement from 2021 to 2024]

Forecast donor-funded Injectable and Rectal Artesunate procurement

<table>
<thead>
<tr>
<th>Year</th>
<th>Injectable Artesunate (millions)</th>
<th>Rectal Artesunate (millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2021</td>
<td>46</td>
<td>3.3</td>
</tr>
<tr>
<td>2022</td>
<td>46</td>
<td>2.5</td>
</tr>
<tr>
<td>2023</td>
<td>39</td>
<td>2.6</td>
</tr>
<tr>
<td>2024</td>
<td>45</td>
<td>3.0</td>
</tr>
</tbody>
</table>
Recent developments

• New guidance from WHO may affect uptake of Rectal Artesunate
  • Country prioritization
  • Donor commitments
  • Manufacturing by WHO prequalified suppliers (Strides, Cipla)