



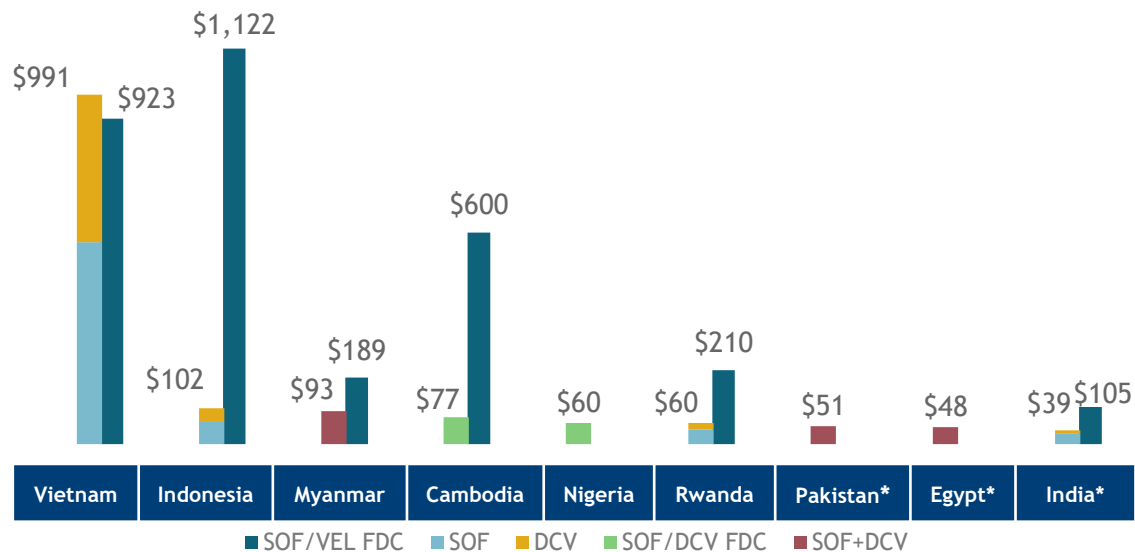
# Viral Hepatitis: Market Intelligence

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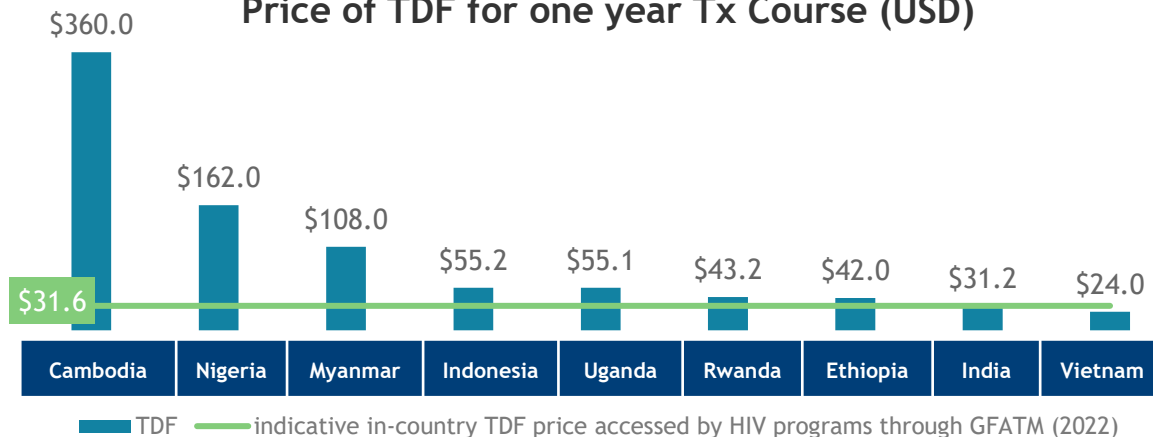
Hepatitis and Harm Reduction Commodities

# Variability in hepatitis drug prices has been a barrier to affordable access

Prices of DAAs for 12 Weeks Tx Course (USD)



Price of TDF for one year Tx Course (USD)



## HCV Treatment

- ❑ Pricing has come down significantly since DAA launch in 2014 from over US\$750 to US\$60 and even lower in some countries
- ❑ Quality-assured generic DAAs are available from suppliers
- ❑ Pricing of DAAs accessed by countries varies from US\$990 to \$39 for a 12-week treatment course with \$60 being the lowest quality assured (WHO-PQ'd) DAA price observed; some countries are procuring locally approved products at a lower price than \$60

## HBV Treatment

- ❑ HBV treatment drugs are also used for HIV treatment; However, HIV and HBV programs are not always able to access TDF at price parity; TDF pricing also varies across countries

Please visit [CHAI's Website](#) for more information on the pricing agreements and FAQs

# Pricing breakthrough reduces the cost of viral hepatitis treatment

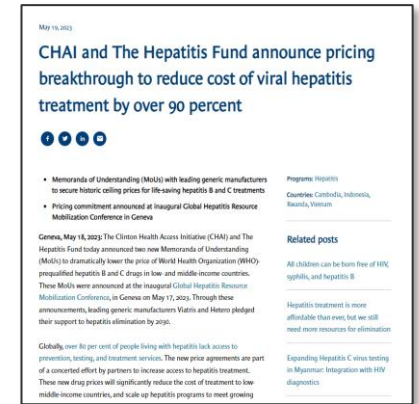
In May 2023, CHAI and the Hepatitis Fund signed a ceiling price agreement with two generic manufacturers of hepatitis drugs

- ❑ 12-weeks course of SOF and DCV to be offered at a ceiling price of **US\$60**
- ❑ TDF 300mg at or below **US\$28.8 per patient per year**
- ❑ All products offered would be either US-FDA approved or WHO pre-qualified

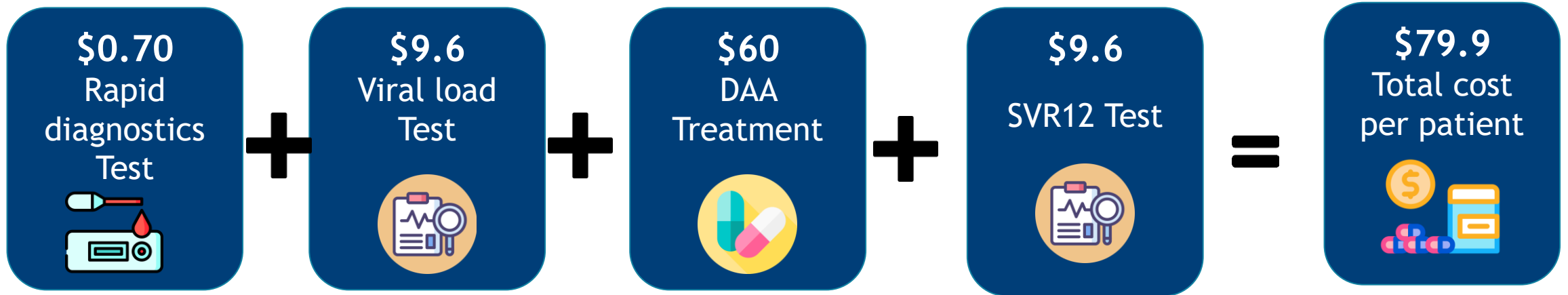
## Who can access the agreement?

- Any organization or entity that is purchasing these medicines on behalf of public sector
- Patients in the territory as per the licensing agreement of generic manufacturers with innovators

Please visit [CHAI's Website](#) for more information on the pricing agreements and FAQs



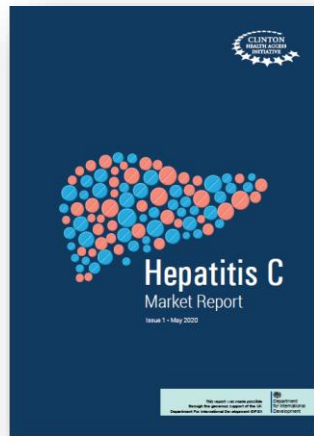
Cost Per HCV Patient



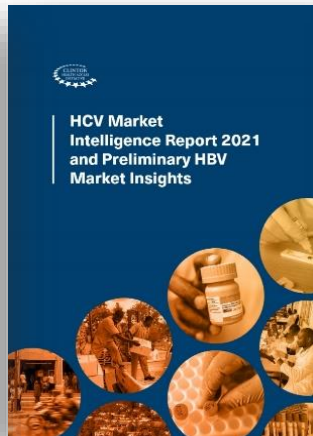
Notes: ((1) DAA treatment price- [GAP pricing](#); (2) VL Pricing (confirmatory and SVR12) GAP Pricing-Refer to ASLM Database [here](#)- prices can range from US\$ 9.60 - \$17.90 per test; (3) RDT pricing: GF PPM Reference Pricing- HCV RDTs can range from US\$ 0.70 - \$1.10

# CHAI routinely tracks and publishes market intelligence for viral hepatitis commodities

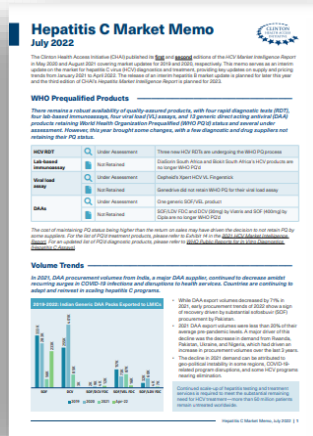
## CHAI Market Reports



2020



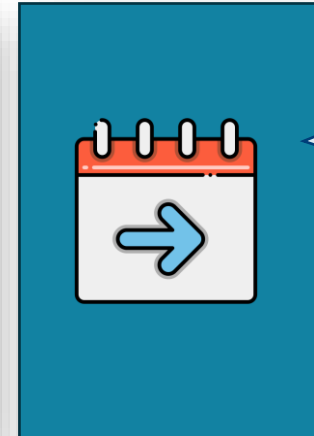
2021



2022



2022



2023

Upcoming report on HCV market intelligence and preliminary insights into harm reduction commodities to be released in Q4 2023

- ✓ Provide market transparency and enable stakeholders to make informed decisions
- ✓ Showcase key drivers and barriers to scale access to affordable diagnostic, treatment and harm reduction products
- ✓ Support stakeholders in identifying key market trends to create targeted access strategies

**Target audience:** Donors and Investors, Country Governments and Health Programs, Civil Society and Technical Assistance Organizations, and Manufacturers & Distributors

# The 2023 HCV Market Report scope includes harm reduction commodities



## HCV Treatment Market Insights

Direct Acting Antivirals



## HCV Diagnostics Market Insights

Rapid Diagnostic Tests; Viral Load Tests



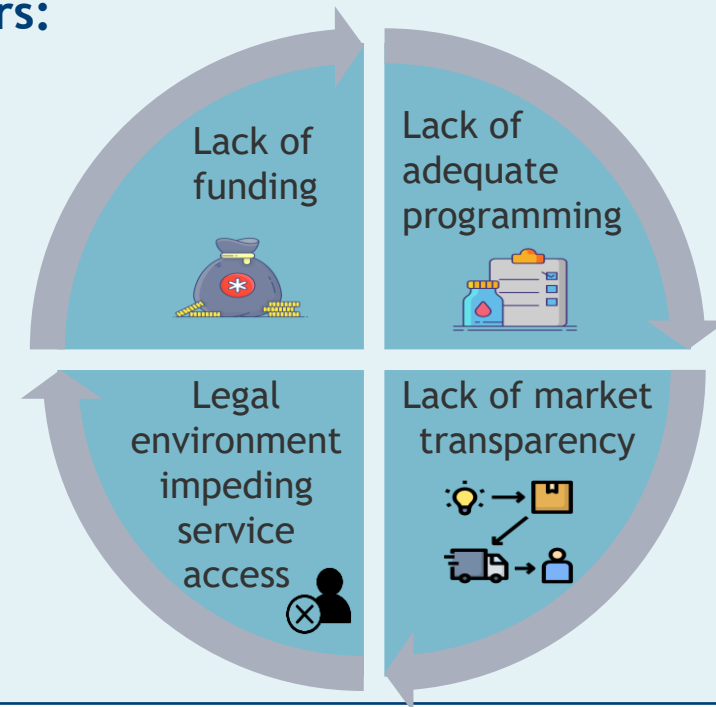
## Preliminary Insights into Harm Reduction

Commodities recommended by WHO\*: OAMT- Methadone & Buprenorphine; Overdose prevention commodities- Naloxone; Needles and Syringes used in Harm Reduction Programs

### Rationale:

- ~15.2% of people who inject drugs have HIV infections, 38.8% have HCV infection, and 8.4% have HBV infection
- Globally, 43% of new HCV infections are attributed to injection drug use with regional variation

### Key Barriers:



# The 2023 HCV Market Report scope includes harm reduction commodities

## Overview of HCV Market Report 2023



### HCV Treatment Market Insights

Direct Acting Antivirals



### HCV Diagnostics Market Insights

Rapid Diagnostic Tests; Viral Load Tests



### Preliminary Insights into Harm Reduction

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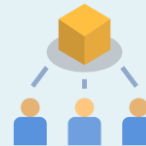
### Key Topics Explored in Harm Reduction:



Consumption trends of OAMT commodities; methadone and buprenorphine in LMICs Vs HICs



Overview of supplier landscape for OAMT commodities



Exploring key demand-side trends in the needles and syringes market



Pricing trends across LMICs