MEETING REPORT

Leading the Way: Building Africa's Medicine Supply Future

25 March 2026

On 11 March 2026, the Access to Medicine Foundation hosted a strategic dialogue in London, with the aim of providing a neutral, collaborative platform for open exchange between leaders working across the pharmaceutical sector. This included both multinational and regional African-based generic and biosimilar medicines (G&BM) manufacturers, as well as implementation partners.

The session, "Leading the Way: Building Africa's Medicine Supply Future," took place against the backdrop of growing momentum across the African continent to strengthen health system resilience, including efforts to build more reliable and sustainable medicine production and supply chains. These challenges have long disproportionately affected Africa, which carries roughly one quarter of the global disease burden yet produces only around 3% of the world's medicines. With nearly 80% of the global medicine supply produced by G&BM manufacturers, these companies occupy a central role in the medicines ecosystem. This importance is even more pronounced in African markets, which rely heavily on imported generic medicines – thus making their reliable supply critical to closing persistent access gaps across the continent. Such efforts require holistic approaches, including but not limited to strengthening local manufacturing capacity supply chain resilience, demand visibility, innovative financing and cross-sector collaboration.

Held under the Chatham House Rule, senior executives and technical experts participated in an interactive exchange, drawing on strategies for bringing much-needed products to markets across the continent. This dialogue builds on key milestones of the G&BM Programme, including a roundtable the Foundation co-hosted with Vizuri Health Dynamics on the sidelines of the 78th World Health Assembly in May 2025, which explored pathways for enabling manufacturing in Africa. Another past programme highlight is the *2023 Company Profiles* report, which maps how a core group of G&BM manufacturers are expanding access to essential products in low-and middle-income countries (LMICs) and provides targeted recommendations for further progress.

ABOUT THE EVENT

The roundtable focused on identifying practical strategies to strengthen the consistent supply and availability of quality-assured medicines across Africa, drawing on concrete product-level examples and peer-to-peer learning to ground the discussion in operational realities. Participants examined the company-level strategies and broader ecosystem conditions – including enablers and barriers – affecting supply resilience, and reflected on adaptable models that can support sustainable supply across different types of products and market contexts. The discussions were structured around two core market segments: high-volume, low-cost generics and low-volume specialty generics.

Across both segments, discussions explored how companies and partners are addressing challenges along the full product journey – from active pharmaceutical ingredient (API) sourcing and manufacturing through to supply, distribution and the last mile before reaching the patient. While efforts are ongoing across the

African continent to harmonise regulatory frameworks, streamline procurement and strengthen technical capacity, participants in the discussion recognised that Africa remains a diverse set of markets, each with distinct health systems, regulatory environments and economic conditions. Participants noted that solutions must therefore be adapted to local and regional contexts rather than applied following a 'one-size-fits-all' model.

SPEAKERS & CONTRIBUTORS

The discussion featured contributions from representatives of companies including Cipla, Fresenius Kabi, Emzor Pharmaceutical Industries, EVA Pharma, Sandoz, Tasa Pharma, Teva Pharmaceutical Industries, Universal Corporation Limited, as well as implementation partners MedAccess, Axmed and mPharma.

Segment 1: High-Volume/Low-Cost Generics

The first segment explored the conditions required for manufacturers to sustain a reliable supply of high-volume, quality-assured essential medicines under tight margins, including antibiotics, antimalarials and drugs for maternal and child health. Discussions centred on two structural barriers: first, Africa's heavy dependence on API imports, particularly from China, where fragmented demand limits manufacturers' ability to negotiate favourable terms. Second, how to balance the appropriate market access strategies across different product types and channels. Donor-funded procurement programmes, for example, often require World Health Organization Prequalification (WHO PQ) for specific medicines, which entails significant investment in regulatory compliance. These investments can be difficult for many African-based manufacturers to make and justify without more predictable revenue streams. In contrast, local procurement programmes require national regulatory approval; this generally involves less investment than WHO PQ, but is mired by fragmented demand, inconsistent procurement cycles and unpredictable revenue streams. Throughout the segment, it was broadly recognised that fragmented procurement and insufficient demand visibility, alongside limited insight into willingness-to-pay per country, make it difficult to prioritise products for the continent, thereby hindering strategic investment decisions.

Segment 2: Low-Volume/Specialty Generics

The second segment examined the conditions required for manufacturers to enter and sustain supply of specialty generics – including long-acting injectable pre-exposure prophylaxis (PrEP), glucagon-like peptide-1 (GLP-1) receptor agonists, sterile injectables and biosimilars such as insulin glargine and trastuzumab – where market entry demands advanced manufacturing capability, regulatory expertise and collaborative partnership models. Discussions centred on the importance of trust in agreeing to voluntary licensing, technology transfers and manufacturing partnerships to enable access to complex products, as well as the conditions often required by originators. Participants also reflected on the complexity of commercial strategy in this space. Procurers in some countries exhibit strong brand preference, for example, whereas for others public tenders are predominantly awarded based on price. What's more, unfavourable payment terms and private market dynamics in African countries that differ significantly from high-income country contexts make it difficult for manufacturers to identify a viable price point. A further area of discussion focused on how demand coordination mechanisms, including volume guarantees, demand aggregation platforms and innovative financing, can reduce commercial risk.

Cross-cutting insights

Underlying both segments was the recognition that multinational and regional African-based manufacturers face distinct challenges and operate with fundamentally different business models across the continent. Together, they form a complementary ecosystem, each serving different roles in ensuring the supply and availability of quality-assured medicines across Africa.

The discussion benefitted from the presence of both types of manufacturer: through peer-to-peer learning, the group highlighted strategies already in use that should be sustained and further scaled as well as areas where deeper improvements are needed. Importantly, many of the strategies discussed require collaboration across multiple stakeholders, including manufacturers, procurement agencies, governments, regulatory authorities, implementation partners and global health organisations; reflecting that no single actor can address these challenges alone. Four broad themes emerged from the discussion:

1. Strengthening API sourcing and supply resilience
2. Leveraging demand visibility and market shaping to ensure quality-assured production and sustainable supply
3. Utilising market access strategies to support sustainable entry and scale-up in target markets
4. Harnessing partnerships to expand manufacturing capacity and improve access

Strengthening API sourcing and supply resilience

Several strategies are already being leveraged by manufacturers to reduce API import dependency and strengthen supply security, with other areas also identified for further action:

- Manufacturers are encouraged to sustain and scale dual sourcing and supplier diversification strategies to reduce dependence on single-source API supply.
- Where commercially and operationally feasible, backwards integration into API production offers manufacturers a longer-term pathway to greater supply security.
- Industry bodies and implementing partners have an opportunity to explore the facilitation of API pooling mechanisms through a third-party intermediary, to strengthen collective bargaining power for smaller scale manufacturers operating across fragmented markets.
- Manufacturers, supported by more unified demand sizing efforts across bodies such as the Africa Centres for Disease Control and Prevention (Africa CDC) and the African Medicines Agency (AMA), could look to improve inventory management and demand-led prioritisation of critical, high-burden products to support more strategic and resilient sourcing decisions.
- Industry stakeholders and global health organisations are encouraged to engage with Chinese API manufacturers as active partners in future supply discussions and industry dialogues, given their central role in global API production.

Leveraging demand visibility and market shaping to ensure quality-assured production and sustainable supply

Participants discussed several strategies to improve the information and market signals needed to guide strategic manufacturing decisions, recognising that without clearer demand visibility and market structures, manufacturers face challenges in developing long-term, sustainable commercial strategies, as well as in ensuring the continued availability of products.

- Manufacturers and procurement agencies can benefit from the adoption of regulatory approaches that are proportionate to the products and markets they serve (for example, donor-funded/international procurement markets versus public/national procurement markets), ensuring that requirements are appropriate, feasible and aligned with local commercial and regulatory realities.
- Procurers are called upon to consider alternatives to reduce fragmentation in the market. For example, variations in pack sizes and branding requirements exist for different markets, and streamlining these specifications could help lower production costs and broaden the pool of competitive manufacturers able to participate in tenders.
- It was deemed critical to develop a more comprehensive view of end-to-end supply chain costs (spanning freight, last-mile distribution, taxation and market-specific logistics) to inform procurement decision-making. This is especially relevant for remote and hard-to-reach areas where more complex distribution processes can significantly affect the true cost of supply, and where pricing pressure is most acute.
- While national governments and health organisations generally understand the health needs of their populations, there is an opportunity for more proactive and collaborative coordination. Stakeholders can consider improving the visibility of product prioritisation across the continent and drawing on data beyond burden of disease. This could include carrying out local needs assessments and tracking willingness-to-pay signals, which can enable more strategic manufacturing and investment decisions.
- Manufacturers and procurement organisations are encouraged to engage with demand aggregation platforms, such as Axmed, which consolidate demand across multiple countries at the International Non-proprietary Name and stock-keeping unit level and synchronise procurement cycles to improve market viability.

Utilising market access strategies to support sustainable entry and scale-up in target markets

Participants identified a range of operational and commercial strategies to support sustainable market entry and scale-up, recognising that viable presence in target markets depends on fairer contractual conditions, innovative pricing approaches and better-coordinated demand. These strategies include:

- Regulatory bodies and governments are encouraged to continue expanding the use of reliance pathways across countries with National Regulatory Authorities that have achieved WHO Maturity Level 3. This will enable regulatory approvals to be referenced across markets and lower barriers to entry for manufacturers seeking to supply across Africa.
- Manufacturers are advised to review the distribution contracts they hold across markets to ensure that existing exclusivity arrangements do not prevent participation in aggregated procurement opportunities, which can ultimately restrict access and increase costs for patients.
- Manufacturers and procurement agencies are encouraged to work towards more equitable payment terms, recognising that cancelled tenders and extended payment cycles create significant financial exposure and stock risk. Fairer contractual terms are critical to sustaining the commercial viability of consistent supply.
- Manufacturers can benefit from continuing to develop and refine differentiated access strategies across both the public and private sectors, taking different payers' ability to pay into account, including patients paying out of pocket.

- Governments and health ministries are encouraged to participate in and strengthen formal pooled procurement mechanisms, such as the African Pooled Procurement Mechanism led by the Africa CDC, to improve demand visibility and reduce commercial risk for manufacturers.
- Manufacturers entering or expanding into new markets have an opportunity to leverage market access programme services, such as the mPharma model, which aggregates data across pharmacy networks to improve demand visibility, optimise inventory management and stabilise pricing. This demonstrates how fragmented markets can be made more commercially viable through better data and coordinated supply.
- Manufacturers can consider innovative financing models: MedAccess' volume guarantee agreement with Hologic for HIV testing, for example, demonstrated how combining all-inclusive pricing with demand guarantees can simultaneously reduce commercial risk for manufacturers and improve budget clarity for procurement agencies. This example offers a replicable model for markets in which uncertainty has historically been a barrier to entry.
- Procurement agencies and buyers who do not already do so are encouraged to work towards establishing structured mechanisms for sharing feedback on tender outcomes, including reasons for non-award. This can improve processes and bolster transparency, thereby strengthening manufacturer-procurer relationships.

Harnessing partnerships to expand manufacturing capacity and improve access

Participants acknowledged that effective collaboration is needed at every stage of the manufacturing process, from API sourcing and production through to distribution and market entry. Manufacturers, governments, procurement agencies, regulatory authorities, implementation partners and global health organisations all have a role to play in building sustainable supply models for both high-volume essential medicines and lower-volume specialty products. However, the following strategies were identified specifically in relation to partnerships between manufacturers, particularly for technology transfers and voluntary licensing agreements for specialty products:

- Originator and generic manufacturers can begin with small, focused initiatives, such as a single product partnership for voluntary licensing agreements, before scaling to broader portfolios. This allows trust to be established incrementally and reduces the risk of early-stage failure, noting that technology transfers are more practically viable when structured around a product line rather than a single product.
- Originator and generic manufacturers are encouraged to establish clear definitions of in-scope countries at the outset of technology transfer partnerships, coupled with robust licensing terms and agreements, to ensure aligned expectations and protected interests.
- Licensees can benefit from developing clear guardrails to address originator concerns around market boundaries for product distribution and parallel import, including track and trace mechanisms in packaging where feasible.

Looking ahead

The roundtable provided an opportunity for stakeholders to share experiences and identify practical actions to strengthen the supply of essential medicines across African markets. A clear need emerged for better guidance to help manufacturers prioritise which products to develop for which markets. Going forward, coordinated multistakeholder action is needed to combine data on countries' unmet medical needs with

insights into government budget priorities, enabling companies to use their formulation, manufacturing and supply capabilities to meet these needs.

This insight, alongside those identified in the cross-cutting discussion, will be used in the Foundation's ongoing engagements with investors, governments, international organisations and civil society to bridge conversations between the industry and relevant stakeholders.

Insights will also inform the next phase of the Foundation's research on G&BM manufacturers and their role in expanding access to medicines in Africa, culminating in the release of a report in September 2026. The publication will analyse how a selection of key players, which includes both large multinational players and emerging regional African-based manufacturers, are approaching supply and availability in African countries, focusing on effective collaborations that can be replicated and further developed to drive progress. The analysis will showcase effective strategies and good practices, as well as identify critical access gaps and provide recommendations for future action.

We encourage you to continue sharing updates on your initiatives and insights from your organisations with the Foundation.