

## Global Investments in HIV Prevention R&D: 2018 Funding Map

|                        |                       |                       |                    |                                     | 2018 totals in US\$ millions (2017 investments, percent change <sup>a</sup> ) |                       |             |                          |              |              |              |              |             |                                     |               |           |                          |             |              |                         |              |               |                                     |               |             |                |               |            |   |   |   |
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| Funding type           | 2017                  | 2018                  | % Change 2017-2018 | Funder                              | Total 2018  | Total 2017            | % Change    | Preventive AIDS vaccines |              |              | Microbicides |              |             | Prevention of vertical transmission |               |           | Pre-exposure prophylaxis |             |              | Treatment as prevention |              |               | Voluntary medical male circumcision |               |             | Female condoms |               |            |   |   |   |
|                        |                       |                       |                    |                                     |   |                       |             | 2018                     | 2017         | Change       | 2018         | 2017         | Change      | 2018                                | 2017          | Change    | 2018                     | 2017        | Change       | 2018                    | 2017         | Change        | 2018                                | 2017          | Change      | 2018           | 2017          | Change     |   |   |   |
| US Public Sector       | \$830 million         | \$829 million         | -0.1%              | NIH                                 | \$720   | \$713                 | 1%          | \$561.7                  | \$561.8      | -0.02%       | \$88.9       | \$95         | -6.3%       | \$31.3                              | \$34.3        | -9%       | \$36.6                   | \$20.1      | 82%          | \$0.6                   | —            | —             | \$0.7                               | \$1.7         | -59.6%      | —              | \$0.02        | —          |   |   |   |
|                        |                       |                       |                    | USAID/PEPFAR*                       | \$72.5  | \$74.7                | -3%         | \$28.7                   | \$28.7       | —            | \$19.9       | \$34.9       | -42.8%      | —                                   | —             | —         | \$23.8                   | \$10        | 140%         | —                       | —            | —             | —                                   | —             | —           | —              | —             | —          | — | — |   |
|                        |                       |                       |                    | CDC                                 | \$1.5   | \$9.9                 | -84.2%      | —                        | —            | —            | \$1.3        | \$1.6        | -22.3%      | —                                   | —             | —         | —                        | —           | —            | \$0.2                   | \$1.7        | -86.4%        | —                                   | \$4.9         | —           | —              | \$1.6         | —          | — | — | — |
|                        |                       |                       |                    | MHRP                                | \$35.6  | \$33                  | 8%          | \$35.6                   | \$33         | 8%           | —            | —            | —           | —                                   | —             | —         | —                        | —           | —            | —                       | —            | —             | —                                   | —             | —           | —              | —             | —          | — | — |   |
| European Public Sector | \$58 million          | \$57.5 million        | -0.7%              | Belgium                             | \$0.2   | —                     | —           | —                        | —            | —            | —            | —            | —           | —                                   | —             | —         | —                        | \$0.06      | —            | —                       | —            | —             | —                                   | —             | —           | —              | —             | —          | — |   |   |
|                        |                       |                       |                    | Denmark                             | \$1.5   | \$1.5                 | 2%          | \$0.7                    | \$0.7        | 7.8%         | \$0.75       | \$0.77       | -3.3%       | —                                   | —             | —         | —                        | —           | —            | —                       | —            | —             | —                                   | —             | —           | —              | —             | —          | — | — |   |
|                        |                       |                       |                    | EC                                  | \$9.5   | \$7.6                 | 25%         | \$9.4                    | \$7.5        | 26%          | —            | \$0.01       | —           | \$0.1                               | —             | —         | —                        | —           | —            | —                       | —            | —             | —                                   | —             | —           | —              | —             | —          | — | — |   |
|                        |                       |                       |                    | France                              | \$5.9   | \$7.1                 | -17%        | \$2.5                    | \$5.8        | -57%         | \$0.05       | \$0.2        | -96.8%      | \$0.27                              | \$0.55        | -51%      | \$2.4                    | \$2.7       | -12%         | \$0.73                  | \$0.14       | 416%          | —                                   | —             | —           | —              | —             | —          | — | — | — |
|                        |                       |                       |                    | Germany                             | \$7.1   | \$3.2                 | 122%        | \$0.01                   | —            | —            | \$6.9        | \$3.2        | 114%        | \$0.2                               | —             | —         | —                        | —           | —            | —                       | —            | —             | —                                   | —             | —           | —              | —             | —          | — | — | — |
|                        |                       |                       |                    | Ireland                             | \$1.5   | \$2.1                 | -31%        | —                        | \$0.6        | —            | \$1.5        | \$1.6        | -6.4%       | —                                   | —             | —         | —                        | —           | —            | —                       | —            | —             | —                                   | —             | —           | —              | —             | —          | — | — | — |
|                        |                       |                       |                    | Italy                               | \$0.4   | \$1.6                 | -73%        | \$0.14                   | \$1.6        | -91%         | —            | —            | —           | \$0.3                               | —             | —         | —                        | —           | —            | —                       | —            | —             | —                                   | —             | —           | —              | —             | —          | — | — | — |
|                        |                       |                       |                    | Netherlands                         | \$6.2   | \$11.2                | -45%        | \$4.1                    | \$3.7        | 10.2%        | \$2.1        | \$7.5        | -72%        | —                                   | —             | —         | —                        | —           | —            | —                       | —            | —             | —                                   | —             | —           | —              | —             | —          | — | — | — |
|                        |                       |                       |                    | Norway                              | —   | —                     | —           | —                        | —            | —            | —            | —            | —           | —                                   | —             | —         | —                        | —           | —            | —                       | —            | —             | —                                   | —             | —           | —              | —             | —          | — | — | — |
|                        |                       |                       |                    | Spain                               | —   | —                     | —           | —                        | —            | —            | —            | —            | —           | —                                   | —             | —         | —                        | —           | —            | —                       | —            | —             | —                                   | —             | —           | —              | —             | —          | — | — | — |
|                        |                       |                       |                    | Sweden                              | —   | \$7.2                 | —           | —                        | \$6.0        | —            | —            | \$1.1        | —           | —                                   | —             | —         | —                        | —           | —            | —                       | —            | —             | —                                   | —             | —           | —              | —             | —          | — | — | — |
|                        |                       |                       |                    | Switzerland                         | \$0.5   | \$0.31                | 53.6%       | \$0.32                   | \$0.31       | 1%           | —            | —            | —           | —                                   | —             | —         | —                        | —           | —            | —                       | —            | —             | \$0.16                              | —             | —           | —              | —             | —          | — | — | — |
|                        |                       |                       |                    | UK                                  | \$17.2  | \$11.2                | 53.5%       | \$3.1                    | \$4.5        | -30%         | \$13.5       | \$6.7        | 102%        | \$0.26                              | \$0.02        | 1414%     | \$0.29                   | —           | —            | —                       | —            | —             | —                                   | —             | —           | —              | —             | —          | — | — | — |
| Other Countries        | \$16.4 million        | \$13.5 million        | -17.5%             | Australia                           | \$2.6   | \$1.51                | 74%         | \$1.9                    | \$0.8        | 132%         | —            | \$0.2        | —           | \$0.07                              | \$0.06        | 26%       | \$0.3                    | \$0.03      | 998%         | \$0.1                   | \$0.2        | -42%          | \$0.19                              | \$0.21        | -5%         | —              | —             | —          |   |   |   |
|                        |                       |                       |                    | Brazil                              | \$1.4   | \$4.1                 | -66%        | —                        | \$0.06       | —            | —            | —            | —           | —                                   | —             | \$0.4     | —                        | \$1.4       | \$4          | -66%                    | \$0.03       | —             | —                                   | —             | —           | —              | —             | —          | — | — |   |
|                        |                       |                       |                    | Canada                              | \$5.4   | \$5                   | 9%          | \$2.3                    | \$3.8        | -41%         | \$2.2        | \$0.8        | 174%        | \$0.3                               | \$0.2         | 41%       | \$0.5                    | —           | —            | \$0.086                 | \$0.087      | -1.7%         | \$0.01                              | —             | —           | —              | —             | —          | — | — |   |
|                        |                       |                       |                    | China                               | —   | —                     | —           | —                        | —            | —            | —            | —            | —           | —                                   | —             | —         | —                        | —           | —            | —                       | —            | —             | —                                   | —             | —           | —              | —             | —          | — | — |   |
|                        |                       |                       |                    | Cuba                                | —   | —                     | —           | —                        | —            | —            | —            | —            | —           | —                                   | —             | —         | —                        | —           | —            | —                       | —            | —             | —                                   | —             | —           | —              | —             | —          | — | — |   |
|                        |                       |                       |                    | India                               | \$0.2   | \$0.07                | 188%        | \$0.2                    | \$0.07       | 188%         | —            | —            | —           | —                                   | —             | —         | —                        | —           | —            | —                       | —            | —             | —                                   | —             | —           | —              | —             | —          | — | — |   |
|                        |                       |                       |                    | Israel                              | —   | —                     | —           | —                        | —            | —            | —            | —            | —           | —                                   | —             | —         | —                        | —           | —            | —                       | —            | —             | —                                   | —             | —           | —              | —             | —          | — | — |   |
|                        |                       |                       |                    | Japan                               | \$2   | \$3.6                 | -44%        | \$2                      | \$3.6        | -45%         | —            | —            | —           | —                                   | —             | —         | —                        | —           | —            | —                       | —            | —             | —                                   | —             | —           | —              | —             | —          | — | — |   |
|                        |                       |                       |                    | Russia                              | —   | —                     | —           | —                        | —            | —            | —            | —            | —           | —                                   | —             | —         | —                        | —           | —            | —                       | —            | —             | —                                   | —             | —           | —              | —             | —          | — | — | — |
|                        |                       |                       |                    | South Africa                        | —   | \$2.1                 | —           | —                        | \$1.6        | —            | —            | \$0.2        | —           | —                                   | —             | —         | —                        | —           | —            | \$0.2                   | —            | —             | —                                   | —             | —           | —              | —             | —          | — | — |   |
|                        |                       |                       |                    | Taiwan                              | —   | —                     | —           | —                        | —            | —            | —            | —            | —           | —                                   | —             | —         | —                        | —           | —            | —                       | —            | —             | —                                   | —             | —           | —              | —             | —          | — | — | — |
|                        |                       |                       |                    | Thailand                            | —   | —                     | —           | —                        | —            | —            | —            | —            | —           | —                                   | —             | —         | —                        | —           | —            | —                       | —            | —             | —                                   | —             | —           | —              | —             | —          | — | — | — |
| Philanthropic          | \$164 million         | \$164 million         | No change          | BMGF                                | \$149.7   | \$150.2               | -0.3%       | \$118                    | \$108        | 9.5%         | \$1.1        | \$3.3        | -67%        | \$0.42                              | \$0.44        | -4.5%     | \$21                     | \$24        | -12.5%       | \$0.23                  | \$0.20       | 13%           | \$8.3                               | \$13.9        | -40%        | —              | —             | —          |   |   |   |
|                        |                       |                       |                    | Wellcome Trust                      | \$2.4   | \$2.1                 | 18%         | \$1.1                    | \$1.2        | -12%         | \$0.6        | \$0.8        | -26.8%      | \$0.6                               | —             | —         | \$0.15                   | \$0.005     | 2669%        | —                       | —            | —             | \$0.02                              | —             | —           | —              | —             | —          | — |   |   |
|                        |                       |                       |                    | Other                               | \$11.9  | \$11.8                | 1%          | \$11.1                   | \$11.2       | -0.7%        | \$0.11       | \$0.14       | -23%        | \$0.4                               | —             | —         | \$0.41                   | \$0.40      | 0.4%         | \$0.2                   | \$0.1        | 107%          | —                                   | —             | —           | —              | —             | —          | — |   |   |
| Industry               | \$57 million          | \$74.7 million        | 30.8%              | Commercial Sector                   | \$74.7 million  | \$57 million          | 30.8%       | \$53.7                   | \$57         | -6%          | \$0.8        | \$0.2        | 303%        | —                                   | —             | —         | \$20.2                   | —           | —            | —                       | —            | —             | —                                   | —             | —           | 0.04           | —             |            |   |   |   |
| <b>Total</b>           | <b>\$1.13 billion</b> | <b>\$1.14 billion</b> | <b>1.2%</b>        | <b>HIV prevention option totals</b> | <b>\$1.14 billion</b>   | <b>\$1.13 billion</b> | <b>1.2%</b> | <b>\$842</b>             | <b>\$845</b> | <b>-0.3%</b> | <b>\$140</b> | <b>\$159</b> | <b>-12%</b> | <b>\$36</b>                         | <b>\$35.7</b> | <b>1%</b> | <b>\$109</b>             | <b>\$63</b> | <b>73.4%</b> | <b>\$2.2</b>            | <b>\$5.6</b> | <b>-61.5%</b> | <b>\$9.2</b>                        | <b>\$17.5</b> | <b>-47%</b> | <b>\$0.04</b>  | <b>\$0.02</b> | <b>79%</b> |   |   |   |
|                        |                       |                       |                    | % Change 2017–2018                  |   |                       | <b>1.2%</b> |                          |              | <b>-0.3%</b> |              |              | <b>-12%</b> |                                     |               | <b>1%</b> |                          |             | <b>73.4%</b> |                         |              | <b>-61.5%</b> |                                     |               | <b>-47%</b> |                | <b>79%</b>    |            |   |   |   |

All figures are rounded. See Appendix for a detailed methodology section, including the limitations of data collection.

\* The USAID Microbicide Program funding covers topical microbicide products as well as systemic and sustained-release HIV pre-exposure prophylaxes.