Global Malaria Commodities Forecasting

Joint Annual Meetings of the SMC Alliance for Malaria Prevention

26th February 2026

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To navigate the complexities of the malaria commodities market, CHAI assembled a consortium of partners to develop short- and long-term malaria commodities forecasting

OBJECTIVES

- **Principal Objective:** Offer a consensus view of expected procurements over the forthcoming years
- **Expected Use Cases:**
  - Supply a tool that may be used for advocacy
  - Provide relevant information to manufacturers that helps with their planning process
  - Anticipate market risks

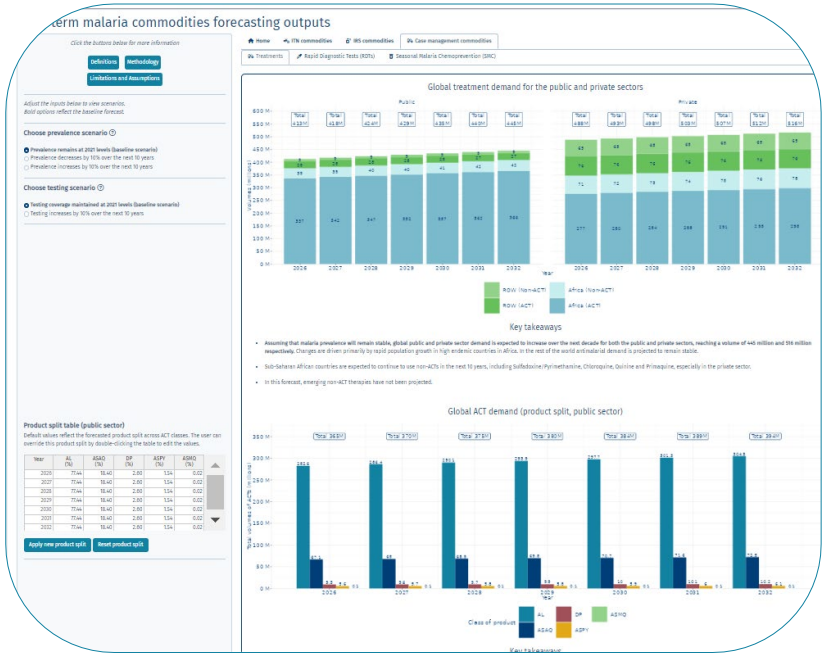
OUTPUTS

- **Procurement** forecast
- **Need and demand** forecast
- **Deep-dive analysis** on a specific commodity market

COMMODITIES

- Rapid Diagnostic Tests (RDTs)
- Treatments
- Seasonal Malaria Chemoprevention (SMC)
- Insecticide Treated Nets (ITNs)
- Indoor Residual Spraying (IRS)

DASHBOARD



CONSORTIUM

CLINTON HEALTH ACCESS INITIATIVE

IVCC

map

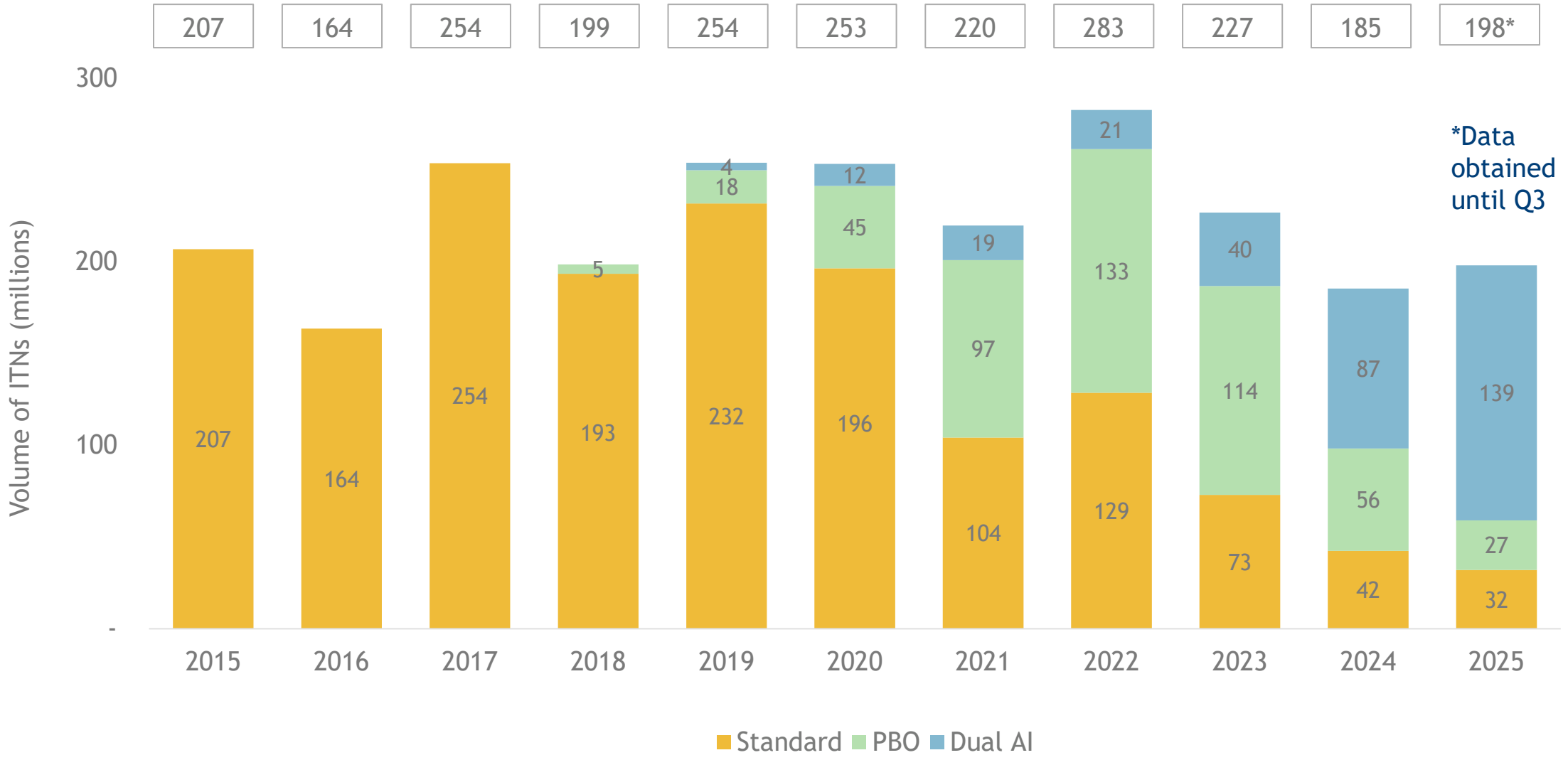
Swiss TPH

MMV Medicines for Malaria Venture

RBM Partnership To End Malaria

HISTORICAL ITN DATA

Historical trends show a shift from standard pyrethroid to PBO to Dual AI nets, amid a rising population at risk of malaria and severe funding constraints



ITN Procurement Forecast

Given increased uncertainty in the funding and commodity landscape beyond 2029, we opted for a five-year ITN forecast rather than a ten-year one

- We have adopted a five-year forecast rather than a ten-year outlook because uncertainty increases substantially beyond 2029, particularly around malaria financing.

- Over longer horizons, these uncertainties compound, reducing forecast reliability. A five-year forecast is more decision-relevant, aligning with donor replenishment cycles, national malaria strategies, procurement planning, and manufacturing timelines, and it better captures the near-term transition in ITN technologies under constrained funding.

- This approach also reflects how the forecasting project will be conducted going forward, as we will move to a rolling five-year framework after this year.

The ITN procurement forecast methodology incorporates an analysis of global malaria funding for GC8, with epidemiological modelling of reduced ITN coverage and assumptions around market-shifting trends

1. Fulfil planned ITNs for 2025-26

ITN volumes for 2025-2026 (Grant Cycle 7) reflect insight received that planned procurement of ITN volumes were fulfilled.

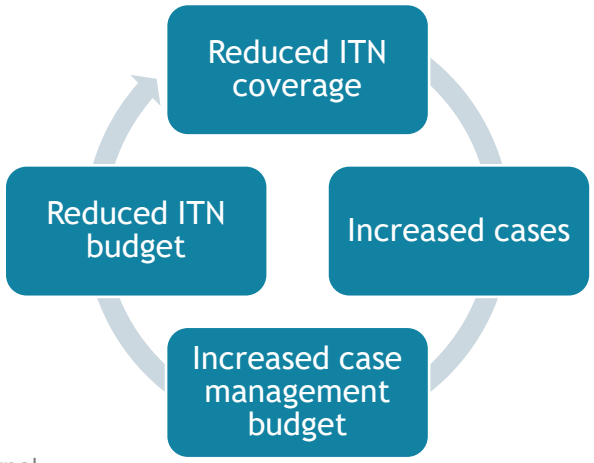
2. Develop funding scenario for GC8

Develop plausible GC8 budget, based on Global Fund contributions, USG funding levels, and AMF/GiveWell-specific funding mechanisms.
Generate country-level budgets based on historical and updated proportions to be awarded from donors.

3. Allocate reduced malaria budgets to commodities for 2027

Allocate budgets for 2027 to case management, non-intervention spend, and vector control, assuming countries respond to cuts by reducing relative spend on non-interventions to lessen impact on ITN volumes.

4. Allocate reduced annual ITN volumes into epi model



5. Reduce ITN volumes in line with increased case management budgets the following year

Utilising transmission model outputs to meet case management needs, adjust reduced ITN budgets to procure ITN volumes for 2028 and 2029.

6. Adjustments for assumed changes in ITN demand

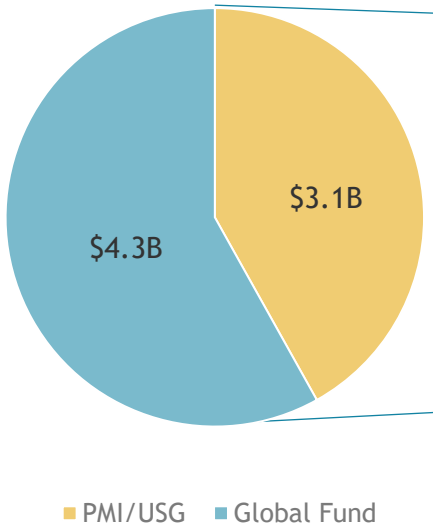
Reduce the volumes of nets distributed through mass campaigns and increase continuous distribution.
Allocate proportion of ITN budgets to spatial emanators.
Allocate volumes to new Dual AI net, with expected market entry in 2029.

We anticipate that global malaria funding allocations will decline by 38% from $7.4B in GC7 to $4.7B in GC8, comprising a 21% decline in Global Fund contributions and a 60% decline in USG/PMI commitments

Analysis on this methodology was completed and frozen on 1st December 2025

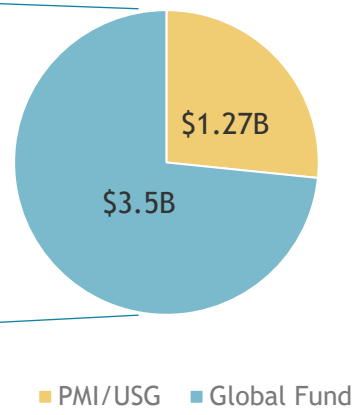
Previous total PMI + GFATM Malaria Country Pot + GFATM Catalytic Pot: **$7.4B**

Grant Cycle 7 (2024-2026) Funding Envelope: $7.4B



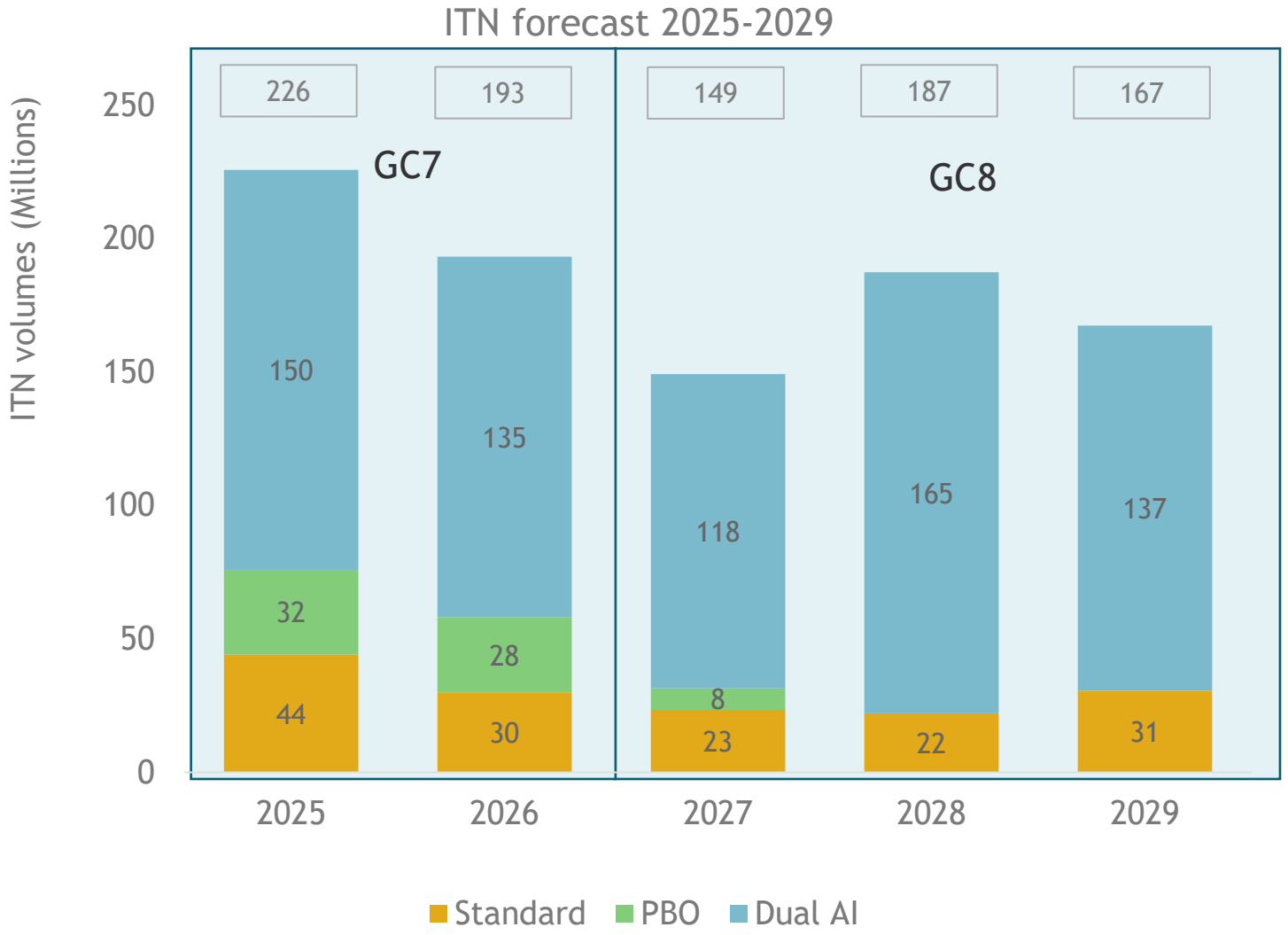
Anticipated total PMI + GFATM Malaria Country Pot + GFATM Catalytic Pot: **$4.7B**

Grant Cycle 8 (2027-2029) Funding Envelope: $4.7B



NOTE: The global malaria funding methodology does not account for changes in investment from GiveWell, AMF, or other private donors. However, AMF funding is accounted for through adjustments at the country-level. No assumptions are made regarding additional contributions from other private donors or increased domestic financing for global ITN procurement.

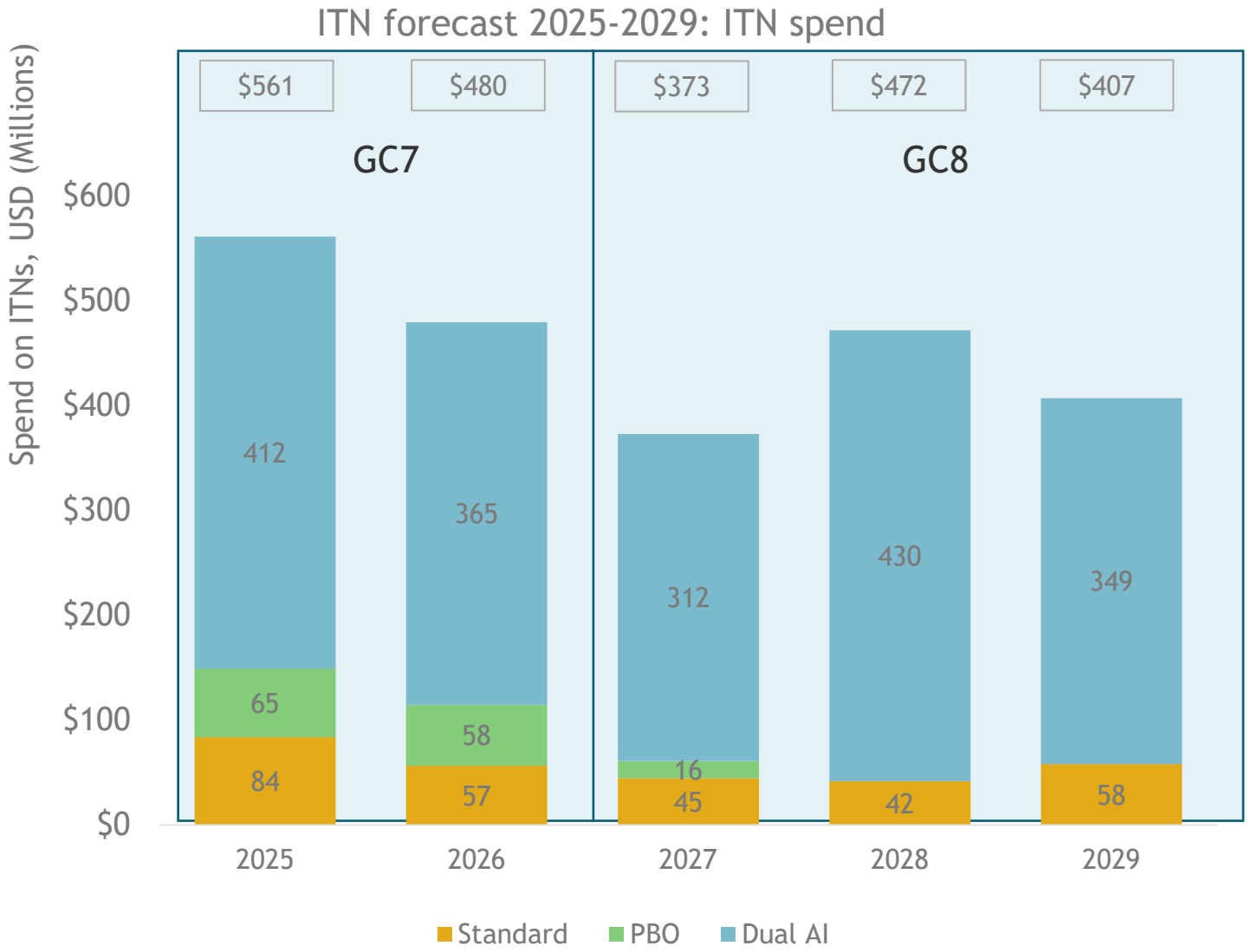
Planned procurement is maintained in 2025-2026; however, ITN volumes in GC8 decline by 16% compared with GC7. This reduction is driven by budget constraints, with impacts mitigated through reprioritization



Key takeaways

- **High campaign activity in 2025:** Several large-scale ITN mass campaigns are planned. Despite early-year disruptions due to the USG funding freeze, procurement has resumed through GHSC-PSM, enabling planned PMI deliveries.
- **Dual AI supply exceeds demand:** Manufacturing capacity for Dual AI ITNs exceeds demand in 2025–2026.
- **Decline in PBO volumes:** The PBO market continues to see large declines, due principally to a more competitive Dual AI market and widespread pyrethroid resistance in sub-Saharan Africa.
- **Stable standard ITN volumes:** Standard pyrethroid ITNs remain steady, reflecting sustained procurement in elimination settings, principally outside of SSA.
- **Low-volume year in 2027:** Low volumes in 2027 reflect a combination of budget constraints and campaign cycles.

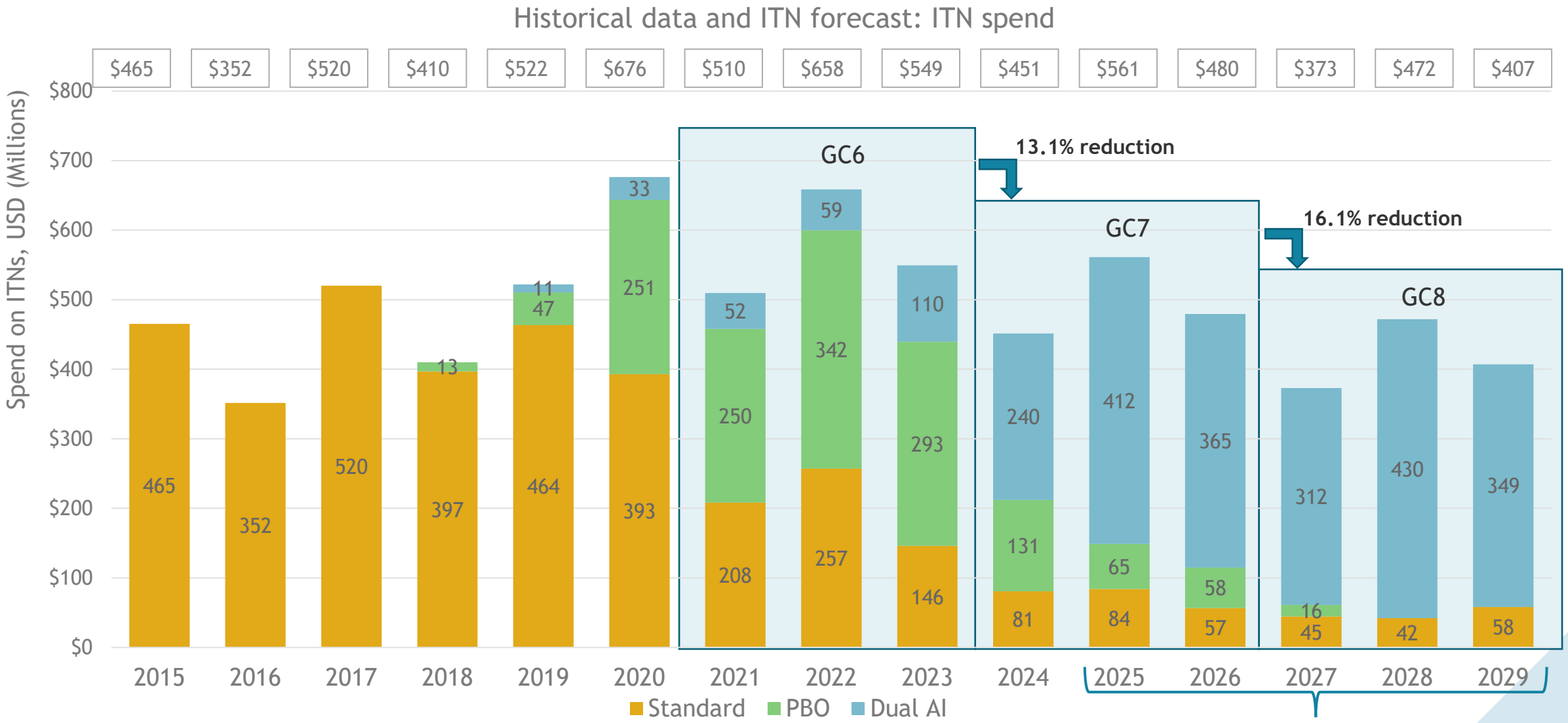
The estimated global ITN spend for GC8 falls to $1.26B (-16.1% vs GC7) driven by tighter funding and heavy prioritization globally



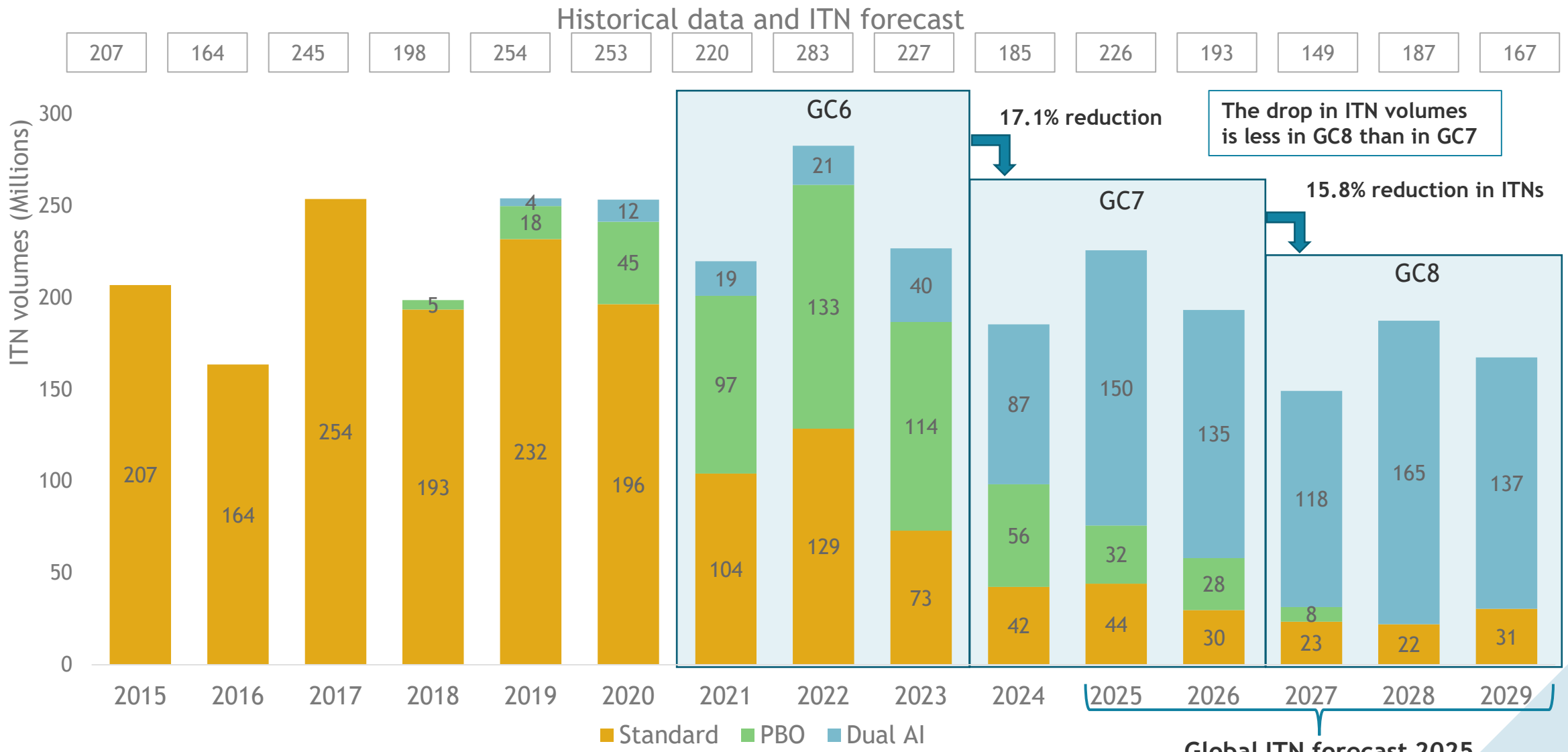
Key takeaways

- **Overall trend:** Shift toward newer, more effective ITNs, with spending driven by product mix, resistance patterns, and campaign timing.
- **Peak spending in 2025:** Driven by several high-volume mass campaigns and resumption of previously delayed procurement through PSM.
- **Dual AI ITNs:** Expenditure expected to grow as manufacturing capacity exceeds demand.
- **PBO ITNs:** Spending declines due to competition from Dual AI products and widespread pyrethroid resistance in sub-Saharan Africa.
- **Spending and ITN volumes both declined** by around 15%, despite a higher share of spending on the more expensive Dual AI ITNs. This was primarily driven by declining Dual AI ITN prices over time.

As a result of heavy prioritization, the drop in spending now mirrors that between GC7 and GC6 previously



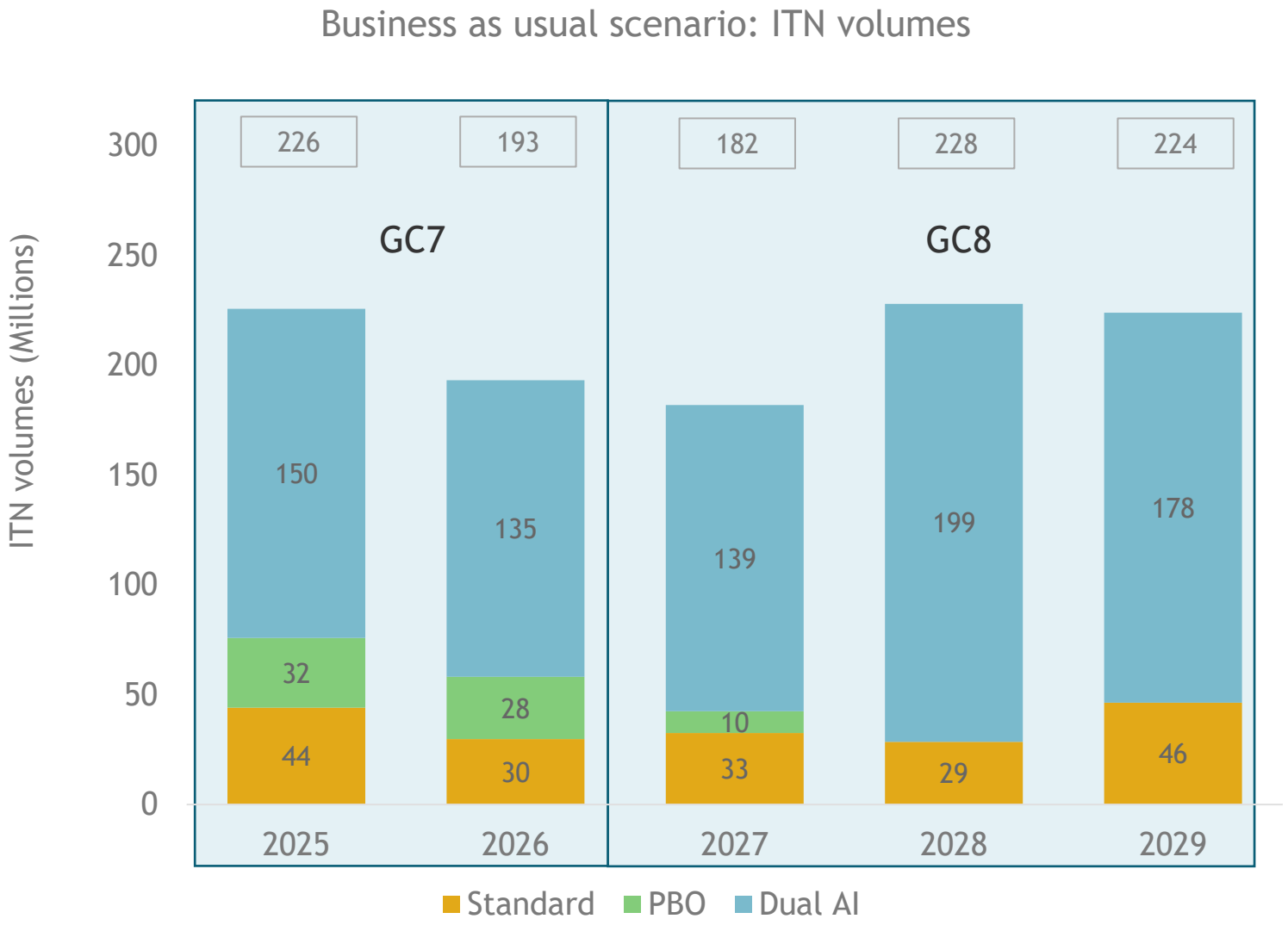
ITN volumes continue to decline across grant cycles even as the population at risk grows, expanding the protection gap amid severe funding constraints



Key takeaways

- Despite an overall decline in global ITN volumes, most high-burden countries maintain significant ITN procurement. The impact of funding constraints is mitigated by several factors:
  - Higher burden countries retain more donor funding than lower burden, and these countries are the greatest consumers of ITN volumes.
  - Countries are expected to prioritize prevention commodities—particularly ITNs— over other non-intervention expenditure areas.
  - In some high-burden settings with low ITN utilization, reductions in ITN coverage resulting from budget constraints did not lead to substantial increases in malaria incidence. As a result, case-management budgets did not increase significantly, allowing resources to continue to be allocated to vector control.
- Dual AI ITNs will dominate the global ITN market, with at least five pre-qualified nets available.
- The demand for PBO nets is expected to diminish as dual AI nets become more accessible and pyrethroid resistance continues to spread and intensify.
- Standard ITN volumes reduce overall and most notably outside of Africa, where more severe malaria funding cuts are expected. ITN volumes outside of sub-Saharan Africa are expected to reduce dramatically with large funding cuts disproportionately impacting the regions.

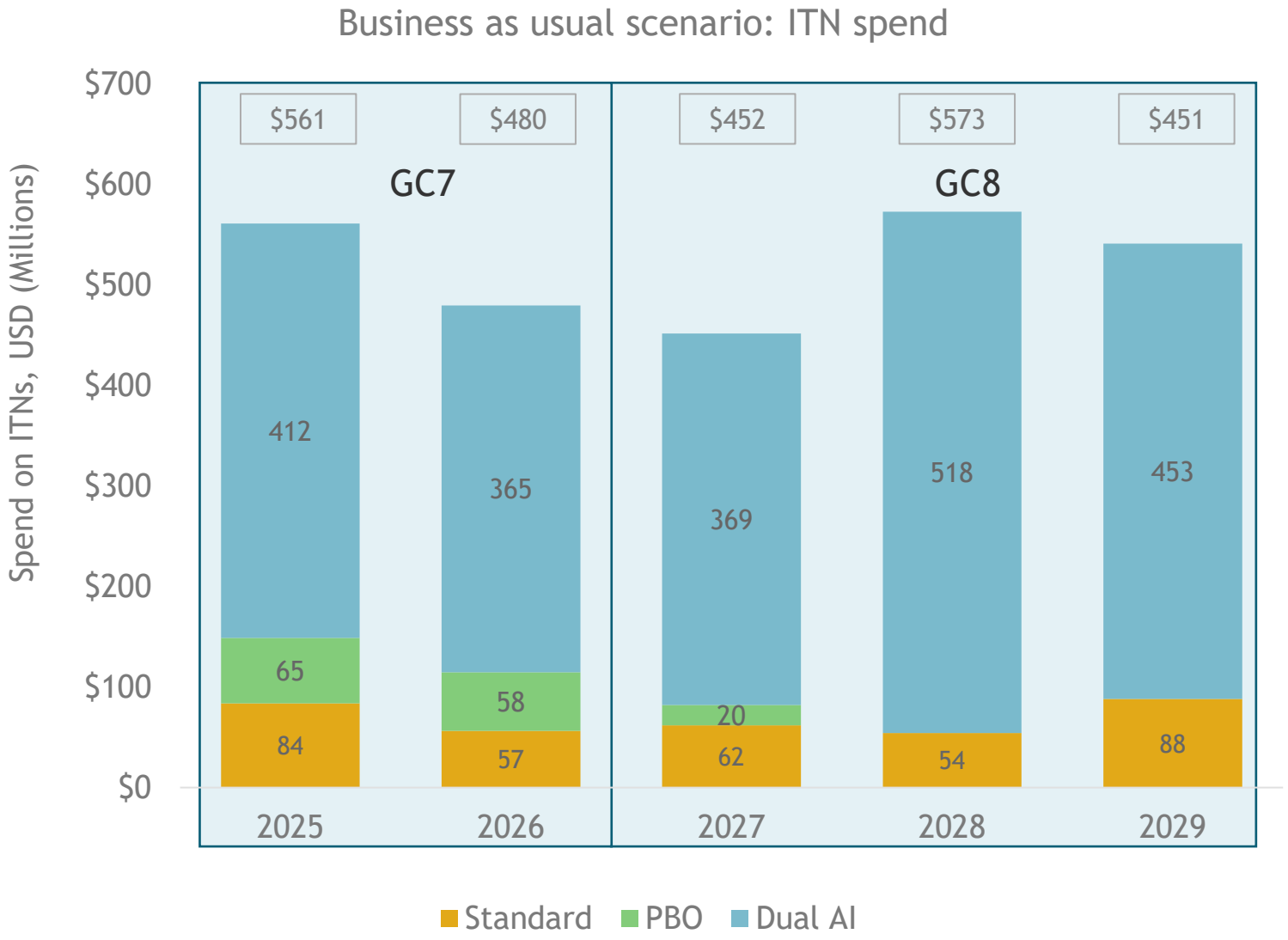
A hypothetical "business as usual" scenario was developed to illustrate the estimated ITN procurement associated with continued availability of funding, alongside population growth and anticipated demand for ITNs globally



Key takeaways

- A hypothetical scenario has been generated to illustrate the ITN volumes that could be procured if the same level of funding were to continue to be available under GC8, as in GC7.
- Should other donors choose to fill the funding gap created by forecasted reductions in the global malaria budget—equivalent to procuring 125 million ITNs—total global ITN volumes for GC8 would reach 634 million.
- The funding gap does not include the funding that had been absorbed by the country's reprioritization activities in our forecast. Additional funds would be required to finance the non-intervention activities that would have been cut within our baseline forecast. This includes important activities such as surveillance.
- No adjustments on ITN volumes have been made in this BAU scenario for: (i) the impact of spatial emanators, (ii) any shifts away from mass campaigns on the ITN market, (iii) volumes outside of sub-Saharan Africa. It is therefore assumed separate funding would be available for spatial emanators, mass campaigns would continue as they have, and volumes outside of SSA continue to be procured.

The additional budget required to fulfill the funding gap for GC8 alone amounts to $300M and would allow for a continuity of ITN volumes between GC7 and GC8 funding

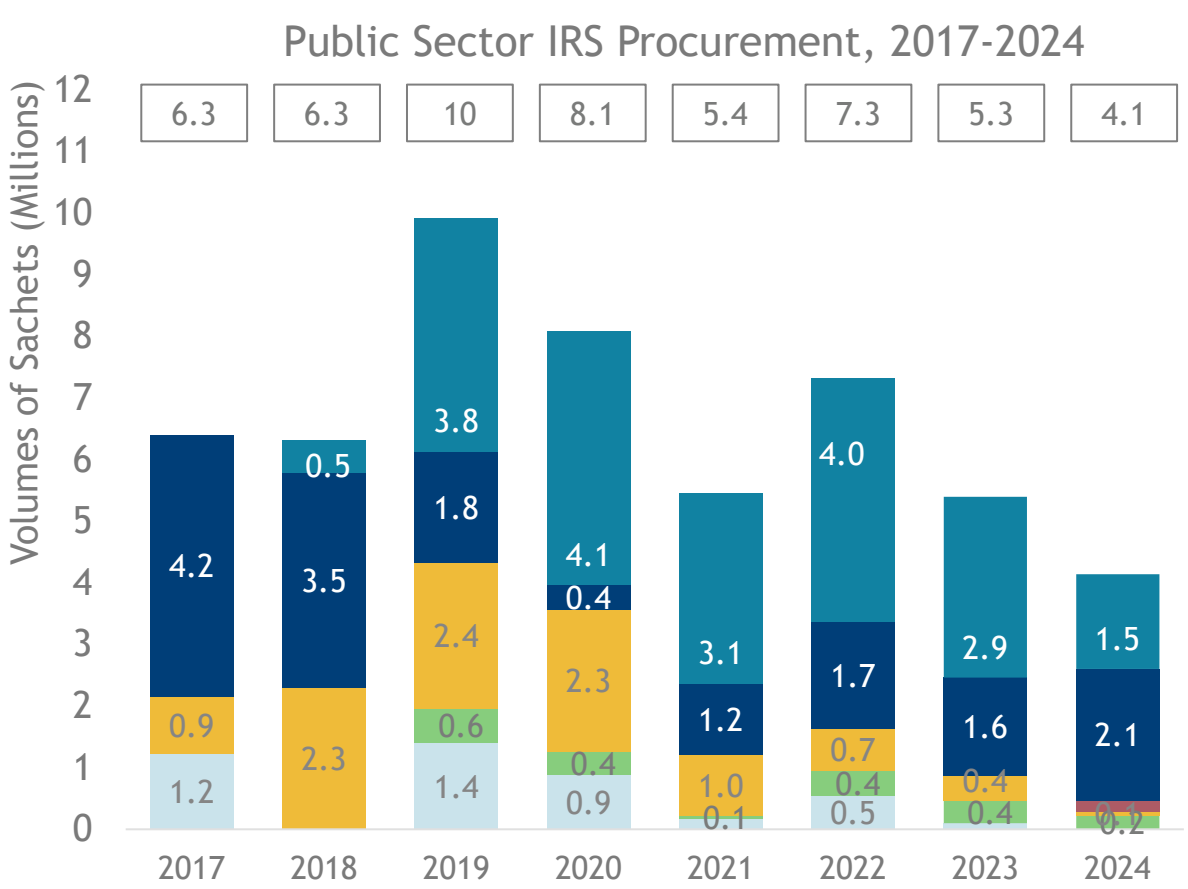


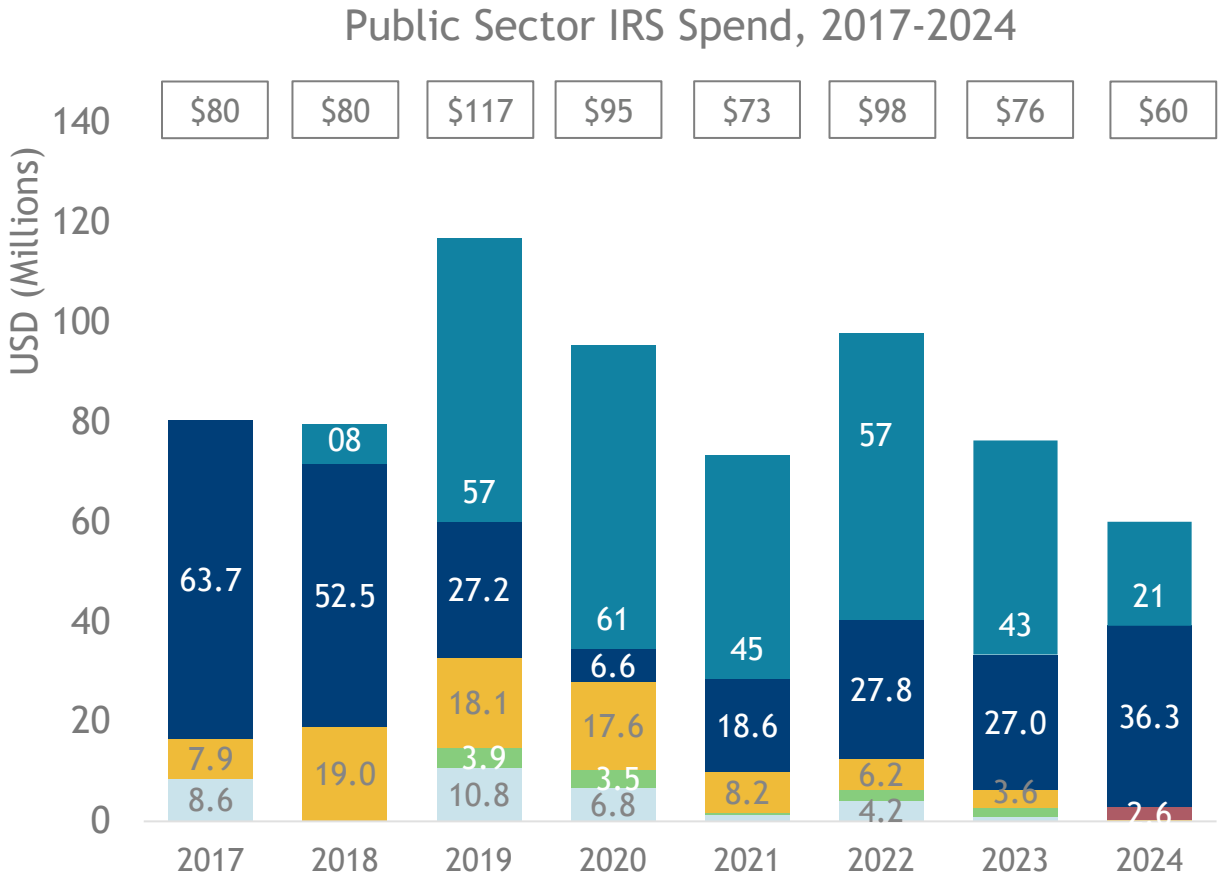
Key takeaways

- A funding scenario where current budgets increase in line with ITN demand as the population at risk increases over time.
- BAU funding would not be sufficient to cover existing coverage gaps.
- The budget required to fulfill the funding gap (for ITN procurement only)for GC8 alone would be $1.56B, which is an additional $300M.
- Any funding for IRS or spatial emanators is assumed be taken from budgets external to ITN budgets under this scenario.

IRS Procurement Forecast

Historical IRS volumes peaked in 2019 at 9.9M ($117M) and have declined since then, with the exception of a temporary increase in 2022





Organochlorines | Pyrethroids | Carbamates | Other | Organophosphate | Neonicotinoids

Data source: IVCC, Evolve, CHAI country programmes
*Data gathered from 2017 onwards and excludes India & Pakistan

Methodology and assumptions for the updated IRS procurement forecast for 2025-2027

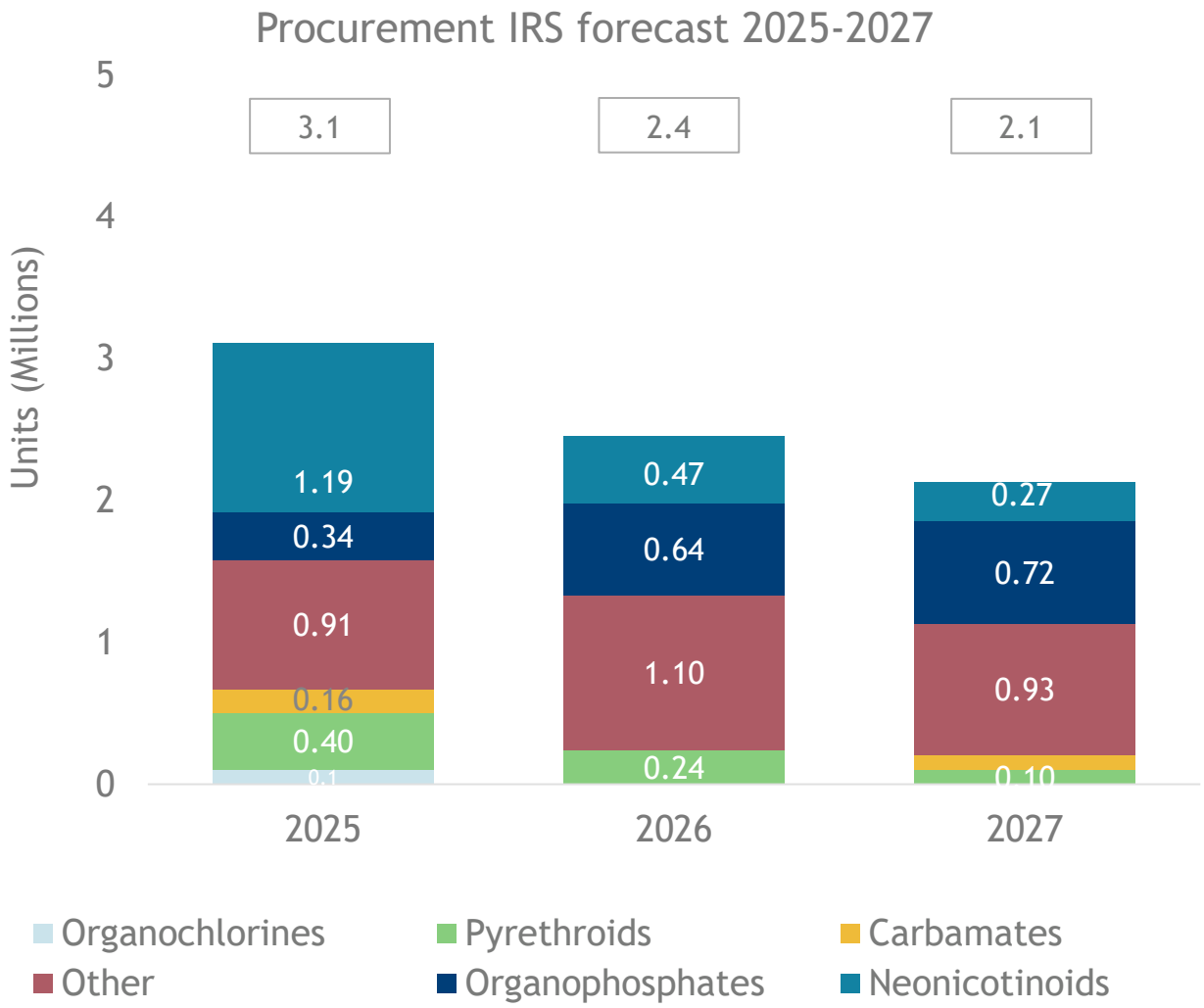
- The forecast is generated through a country-by-country assessment of historical insecticide use and known or assumed continued commitments to insecticide classes.
- Procurement data has been compiled from key partners involved in IRS programmes, which has been corroborated through partner discussions and country-specific insight.
- Data for 2027 has been generated through assumptions around continued donor commitments to insecticides for IRS and around continued domestic and private financing.
- The 'Other' class of insecticides include recently pre-qualified insecticide products: Vectron T500, Sovrenta, and Sylando.
- The neonicotinoid class of insecticides includes any product with neonicotinoid, including brands that contain a mixture of neonicotinoid and pyrethroid.
- We do not have access to data from key IRS markets such as some countries in Latin American and Asia (particularly India and Pakistan). These countries are therefore excluded from the forecast.

Insecticide class	Price per sachet/bottle
Pyrethroids	$1.69
Carbamates	$10
Organochlorines	$8.20
Organophosphates	$16
Neonicotinoids	$13
Other*	$16.50

Rational for IRS forecast

- Our procurement forecasts are based primarily on confirmed or highly likely orders. In this iteration, elevated uncertainty around Global Fund country allocations and USG MOUs under development required greater reliance on assumptions and qualitative inputs from internal and external partners. As a result, this short-term forecast carries a higher degree of uncertainty and a wider margin of error than previous iterations, while still reflecting a balanced assessment based on the best information currently available.

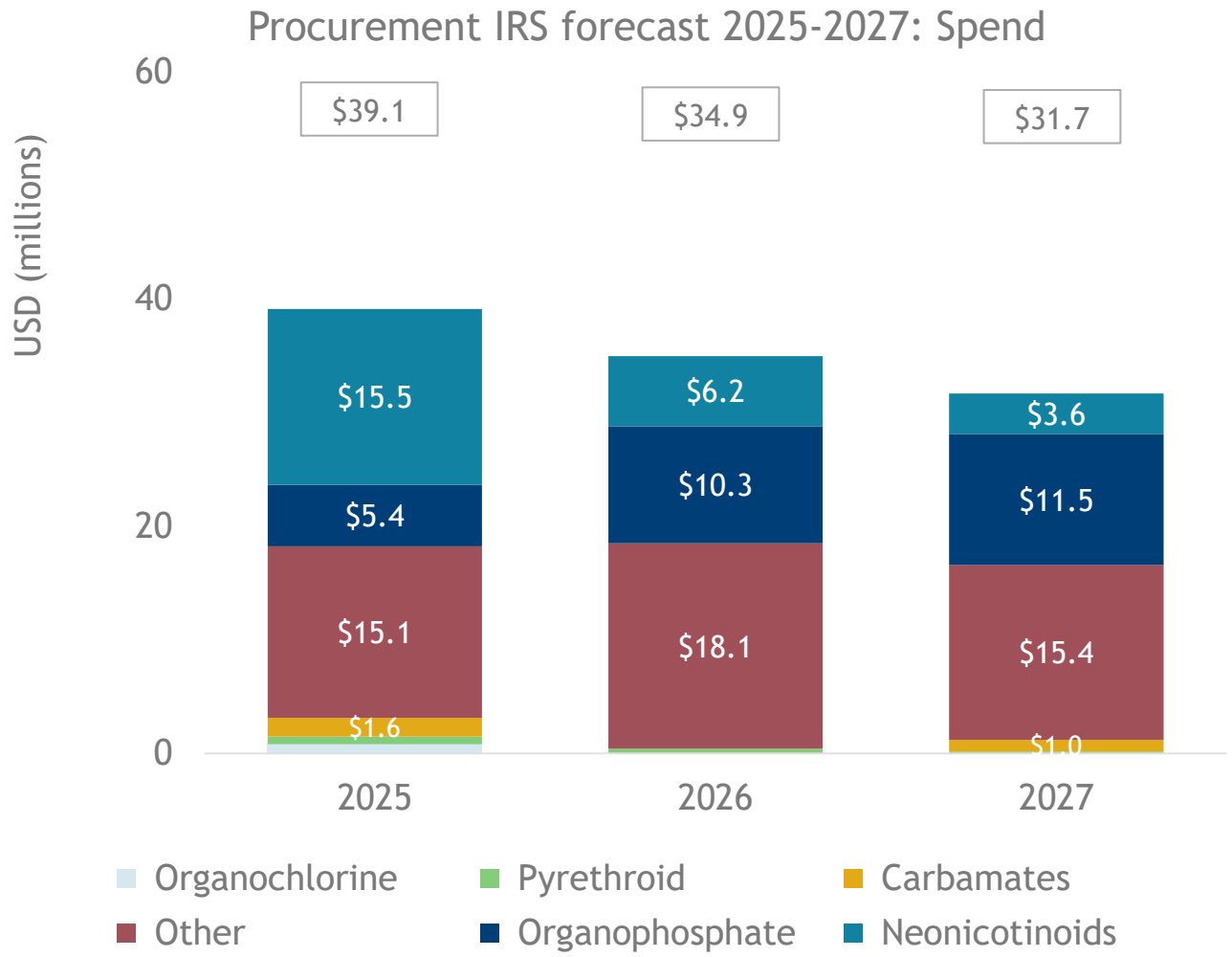
IRS volumes are anticipated to decline in GC8, and maintenance requires a mixture of continued donor commitment, alongside domestic



Key takeaways

- We have visibility on IRS data through 2026 based on planned procurement and government commitments to continue investing in IRS programmes
- The majority of global volumes for insecticides for IRS are limited to 11 countries.
- Limited donor commitments for 2027, uncertain domestic financing, and the introduction of spatial emanators reduce certainty around IRS volumes for 2027.
- Volumes for 2027 have been generated based on assumptions of continued but lower donor commitments, as well as domestic financing.

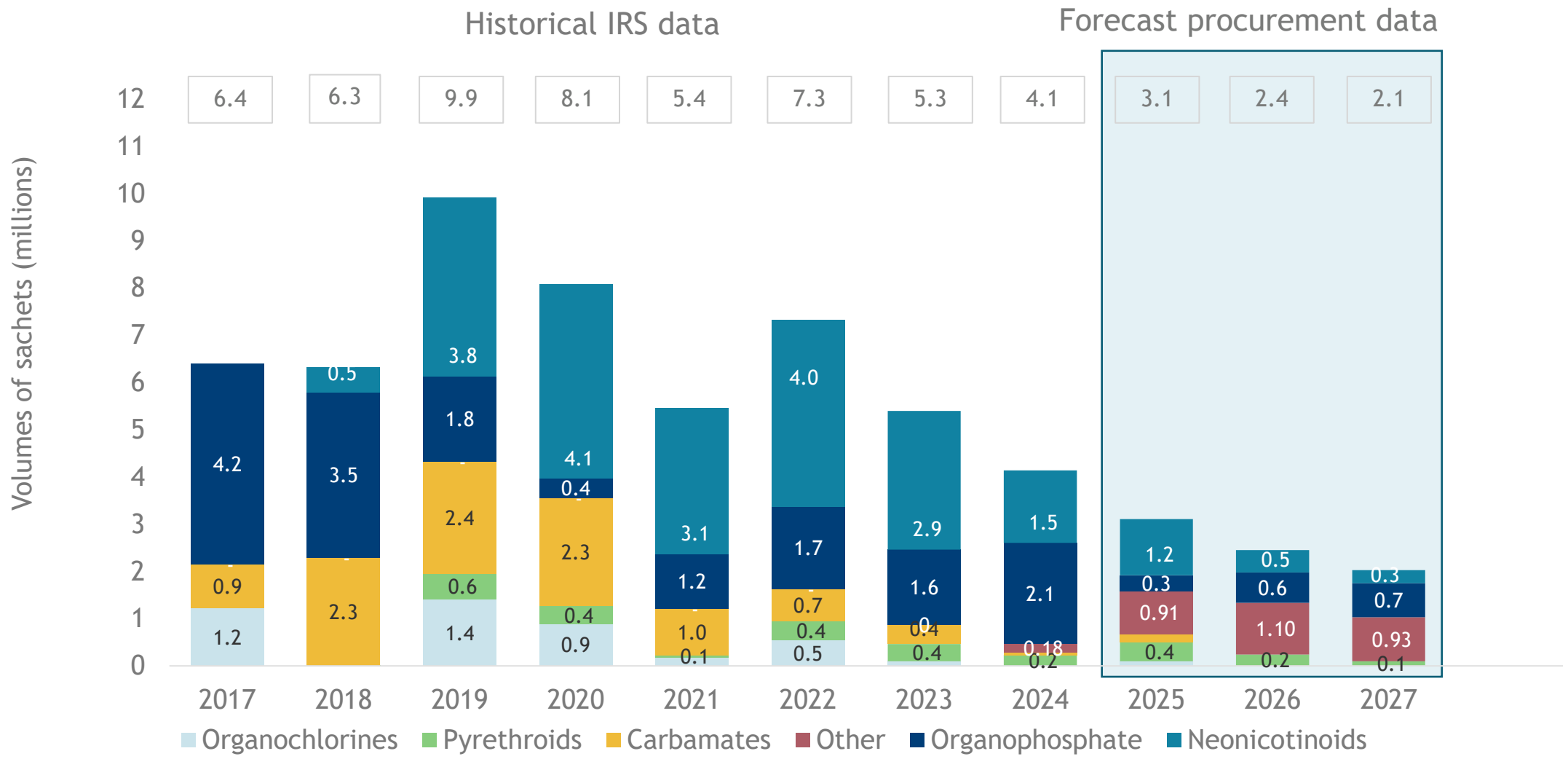
As budgets for IRS continue to reduce, the new classes of insecticide are anticipated to meet the budget demands and maintain the market in 2026



Key takeaways

- As IRS budgets have reduced between 2024-2025 ($60.7M - $39.1M), volumes have also reduced but by a lesser extent. This is due to the market entry of alternative insecticides entering at a lower price.
- In 2027, we anticipate a number of countries with long-standing IRS deployment will allocate domestic funds to mitigate donor gaps.

Forecast procurement data show a steady decline through 2027, based on assumptions of constrained GC8 budgets and continued prioritization across interventions



Data source: IVCC, Evolve, CHAI country programmes
*Data gathered from 2017 onwards and excludes India & Pakistan

Key takeaways

- Budgets and volumes trend downward over the forecast period, reflecting sustained funding pressure and prioritisation of fewer, core interventions.
- Uptake of the new insecticide classes (within the IRAC-30) group is anticipated in the short-term.
- Near-term visibility is relatively strong through 2026–2027, where plans largely reflect committed or planned procurement.
- Market trends become increasingly uncertain in 2027, as future replenishments, donor priorities, and country allocations remain undefined. Projections for 2027 should be interpreted as directional rather than predictive, indicating potential scale rather than firm demand.

Please direct any questions/comments to:
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