Modality	Status (2025)	Gaps	2026 Priorities
ARV-based Prevention	• Ongoing rollout of daily oral, CAB, and DVR • Ongoing momentum with LEN approvals, accelerated roll out and market shaping - potential intro in 12 priority countries by Q1 2026 • Launch of monthly oral pill (AMI) Phase III trials in 17 countries • Research progress towards 12-month dosing cycles for LEN, 4-monthly CAB, and 90-day ring	• Slow scale-up of proven options (oral PrEP, injectable CAB, DVR) • Funding cuts disrupting pipeline diversification • Missing on-demand and short-acting prevention products in prevention toolbox	• Accelerate implementation and optimization of existing PrEP options • Innovate community-led delivery platforms and differentiated service delivery models • Define market segmentation for multiple LA regimens • Maintain community engagement and regulatory readiness for rapid rollout of new products • Re-balance product pipeline • GPP / ongoing engagement for AMI program
Multi-Purpose Prevention Technologies (MPTs)	• Pipeline mostly in pre-clinical/early phase • DPP the most advanced MPT; Phase IIb acceptability study ongoing • Other MPT products stalled by USAID cuts, including MATRIX product pipeline	• Funding uncertainty for key products, including vaginal film and fasting dissolving inserts • Limited products for gender-diverse populations • Complexities around manufacturing and regulatory pathways • Limited STI prevention integration	• Develop investment case for paused MPT products to funders • Expand pipeline beyond ARV-based products and cis-women population • Engage regulators, WHO, and advocates early to define combination-product pathways • Build on lessons learnt from DPP market shaping conversation for future MPT products
Vaccines	• Most studies in early phase focusing on germline-targeting, inducing T-cells, and mRNA approaches • 6 small trials started under HVTN despite funding cut threats • Uncertainty about NIH support for HIV vaccine R&D-e.g. CHAVD threats • USAID terminated ADVANCE and BRILLIANT programs • Growing vaccine hesitancy, mis- and disinformation	• Lacking consensus on TPP • Lack of clarity on interim milestones for success • Risks to R&D infrastructure in high burden regions • Weakening political/public support	• Align and socialize updated HIV vaccine TPP • Create coordinated R&D roadmap with clear milestones • Rebuild advocacy to sustain funding and counter misinformation • Invest in regulatory, trial, and manufacturing capacity in high-burden regions - Africa, Asia, Latin America
Broadly Neutralizing Antibodies (bNAbs)	• Ongoing progress toward combo bNAbs (“combo AMP”) • Early trials testing potency, breadth, and duration of different combos • Ongoing focus on infant prophylaxis and combo formulations • Attempts to define market pathways	• Unclear role and market use case as an actual product • Complex manufacturing/delivery • No defined commercialization or access path	• Reach consensus on bNAb use cases and update TPPs • Clarify development and regulatory pathways • Define commercial-partner strategy • Sustain civil society dialogue on potential role of bNAbs
Cross-cutting	• Funding contractions reshaping priorities without community input • Shifting focus to implementation science at expense of discovery science and product development • Complexity of conducting traditional randomized controlled trials in current prevention landscape • Widespread uncertainty and instability threaten future efforts	• Invest across basic research, clinical trials, and implementation science, avoiding duplication and prioritizing unmet needs • Embed meaningful community engagement & GPP at all stages of research, including trials & implementation • Use adaptive and inclusive trial designs informed by community perspectives, with clear access plans for successful products • Sustain early-phase trial infrastructure to enable future progress	

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