



MSF Supply 2025 annual review

MSF Supply



2025: the end of a strategic cycle

2025 WAS A PIVOTAL YEAR. It marked the end of a four-year strategic cycle and paved the way for new ambitions.

It was also a period during which we rethought our management approach to make our decision-making processes more agile and strengthen our collective effectiveness.

This year also saw the launch of the second phase of our information systems review project, involving studies, internal reorganisations and intensive collaboration with our two integrators.

All MSF Supply departments were mobilised to support this major project.

At the same time, changes in the global context forced us to strengthen our ability to adapt. It is in this context that our mission has been adjusted to more accurately reflect our role within the network:

'MSF Supply, a key player in the Médecins Sans Frontières network, has a mission to provide high-quality products and services that meet the needs of medical humanitarian organisations, while adapting to the challenges of a constantly changing environment.'

This development reflects our desire to move forward, transform ourselves and prepare today for the solutions that tomorrow's missions will require.

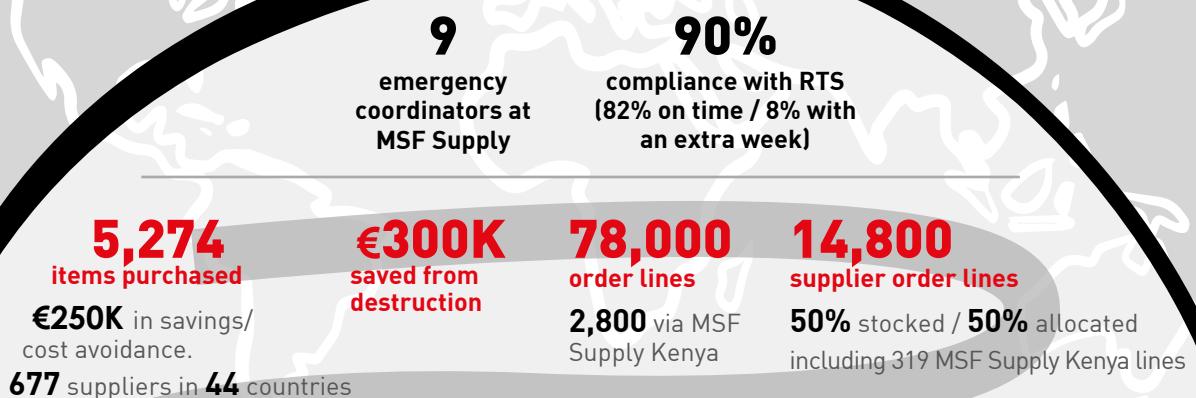
2025 was also the year of the full integration of MSF Supply Kenya. After nearly four years of work carried out in three phases, we have met all the conditions for successful integration within the framework of regionalisation.

Finally, the year strengthened our ties with other supply centres. Numerous projects – large and small – accelerated the pooling of resources, the sharing of best practices and, soon, the implementation of key common systems.

I would like to thank all the MSF Supply teams for their energy, commitment and professionalism in what is always a demanding operational environment.

Thank you all.

P-P Lamotte
General Manager
MSF Supply



2,104
new items validated as at 1st December 2025

215 Transport Log.
+ **715** Administration Log. + Programme Support (44%)
1,174 Med. (56%)

Increase in our overall storage volume of 6%
and redefine storage areas

10,401 orders received in 2025

EXPORT
3,702 tonnes sent including 644 tonnes by MSFSK

1,460t by air (including 676 by charter), of which 19 by MSFSK

1,092t by sea, including 3 by MSFSK

1,147 t by road, including 603 by MSFSK

2.8t at headquarters

15 kg by express delivery

IMPORT
(organised by MSF Supply^[1])

672 tonnes imported, including 400 by MSFSK

47t by air

569t by sea, including 400 by MSFSK

57t by road

80 containers imported, including 45 by MSFSK

10 containers shared with APU out of 35 containers imported

CUSTOMS

1,108 items in transit managed through our bonded warehouse handled by MSF Supply^[2]

362 imports in transit

1,362 exports in transit

5,263 certificates managed

636 IT support tickets

28,725 sales invoices (including credit notes)

14,964 purchase invoices (including credit notes)



145 employees
(including 5 trainees)

[1] Data does not include import transport organised by suppliers.

[2] Data does not include declarations made by our freight forwarders.

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MSF Supply highlights

OPERATIONS

MANAGING EXPIRY DATES

**ACCELERATED INTER-CENTRE
COOPERATION**

**RESTRUCTURING – FOCUS ON
WAREHOUSE MANAGEMENT**

**OVERHAUL OF OUR
INFORMATION SYSTEMS**

**DEVELOPING THE STRATEGY
FOR 2026-2031 AN EVOLVING
AND COLLABORATIVE PROCESS**

SAVINGS REALISED

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Operations

2025 was a year of contrasts and challenges for MSF Supply. Right from the start of the year, our teams were mobilised by major emergencies in Sudan, Gaza and the Democratic Republic of Congo, which had continued from 2024. After a slowdown halfway through the year, a new influx of both end-of-year and emergency orders brought the financial year to a close, marked in particular by Hurricane Melissa in Jamaica. This situation had a direct impact on our activity and on the way in which we structured our response.

In terms of collaboration with our external partners, their contribution to our turnover fell by around 5% as a direct result of US budget cuts. Our relationships with key partners such as ALIMA, Action Against Hunger and the French Red Cross remain strong, while SANRU in the DRC and ACF Spain marked the year with a high volume of orders.

Beyond the figures, 2025 was also a year of consolidation and innovation – a year of consolidation, with the extension of the framework agreement with Action Against Hunger and the signing of a new agreement with ALIMA, confirming our role as a strategic partner; and a year of innovation, thanks to two developmental projects:

- **the 'Unpacking management' project**, which, thanks to a workflow and automation tool, streamlined a process that had become far too cumbersome;
- **the 'Countries subject to constraints' project**, designed to integrate the management of import constraints into our standard operating procedures rather than treating them separately. This approach has made it possible to handle these countries systematically, reducing the workload on the teams and improving overall responsiveness.





Managing expiry dates

In 2025, due to growing constraints (import restrictions, minimum orders, etc.), a significant quantity of expired products had to be destroyed. This reality is striking and highlights the importance of rigorous expiry date management. However, it is encouraging to learn that nearly €300,000 were saved thanks to targeted actions. Managing expiry dates is not just a financial issue; it also affects operational efficiency and environmental responsibility.

Every product destroyed represents a tangible loss, a waste of resources and an avoidable ecological impact. The solution is shared by all departments: from purchasing to quality control, replenishment and operations, each contributes to limiting these risks. The fight against destruction can therefore only be approached in a collective and integrated manner.

To address this challenge, several courses of action have been put in place:

- Raising awareness among the teams and missions is an essential first step in finding solutions before resorting to destruction.
- Monthly communication, particularly via OCB platforms such as BSU, allows products to be reallocated to other environments before their expiry date.
- Optimising use-by dates, with direct sourcing from manufacturers to obtain longer shelf lives, particularly for critical products such as MiniLab reagents.
- Reducing supply deadlines by favouring local suppliers in order to limit stock and anticipate demand more effectively.
- Targeted management of dormant stock, with specific monitoring of the top 10 products at risk, allows efforts to be concentrated where the impact is greatest.
- Increased flexibility with regard to product shelf life, which takes into account FEFO (First Expired, First Out) and use-by dates, helps to avoid sending products that are close to their expiry date to programmes.

The challenges ahead centre on the growing constraints imposed by certain countries on use-by dates (which complicates flow management), and on improved compliance with schedules, as well as the need to find alternative products with a longer shelf life.

Accelerated inter-centre cooperation

Inter-centre cooperation, which has the potential to lead to increased pooling and interoperability, is a key strategic lever between MSF Supply, MSF Logistique and the Amsterdam Procurement Unit (GPU). The past year has been marked by significant progress in terms of harmonising processes, coordinating actions and optimising resources, reflecting a shared desire to consolidate synergies and improve collective efficiency.

One of the main achievements was the creation of common processes and tools. The three purchasing centres, in conjunction with the Global Procurement Unit (GPU), strengthened their common practices, in particular by revising contract templates with the support of the legal department. MSF Logistique deployed Qualios DOC, inspired by the experiences of MSF Supply and MSF Supply Kenya, while Recliext was adopted as a common tool for claims management, promoting a unified and more streamlined approach.

Other tangible progress was also made to strengthen coordination and sharing between entities. The signing of a letter of intent between MSF Supply and MSF Logistique marked a long-term commitment, listing high value-added projects and coinciding with the change of General Manager at MSF Logistique. Regular business reviews were organised on key topics such as purchasing, replenishment and warehousing. In addition, the creation of a forum bringing together the head pharmacists (HPs) of the three supply centres provided a structured space for discussion. Finally, sharing the risks associated with product destruction helped to reduce losses and strengthen collective resilience.

In terms of sourcing and purchasing strategy, collaboration was stepped up through the preparation of and joint visits to trade shows such as Arab Health and CPHI (Convention on Pharmaceutical Ingredients). Joint purchasing strategies were developed based on a Lead Strategy and Supplier Buyer Lead approach, particularly in sensitive areas such as HIV and hepatitis C. Alignment with supplier performance was relaunched with the GPU, integrating purchasing and replenishment across the three centres to ensure greater consistency and efficiency.

Logistics and shipping also benefited from this pooling initiative. Consolidated shipments were organised, such as flights to Gaza, streamlining costs and strengthening operational capacity. In terms of quality and compliance, MSF Supply and MSF Logistique aligned on a requirement for 50% remaining shelf life, thereby reducing non-compliance on receipt and improving the reliability of supplies.

Finally, active cooperation at trade shows and in procurement strategies illustrates a shared desire to broaden perspectives and strengthen competitiveness.

In the future, it will be of interest to:

- continue to align with supplier performance in order to consolidate the results achieved;
- strengthen the digitisation and automation of common processes, in particular via the new information system between MSF Supply and MSF Logistique, which represents a key step in increasing our efficiency;
- extend pooling to other areas that have not yet been fully explored.



Restructuring – focus on warehouse management

The warehouse's organisational structure had not been thoroughly reviewed since the implementation of the Warehouse Management System (WMS) fifteen years ago. Since then, business volumes, import restrictions in various countries and regulatory requirements concerning pharmaceutical warehouse management have increased considerably, making warehouse operations more complex.

For the past three years, two coordinators have been responsible for the day-to-day management of the teams (40 people), while also contributing to the strategic vision of the management team. This model, which was effective in its early days, has become obsolete in the face of increased activity and new strategic directions.

Discussions had already been initiated by the Extended Management Committee (a committee comprising all coordinators working at MSF Supply) since 2022, and constant requests for managers to be more involved with their teams confirmed the need for change. Interviews conducted by the human resources coordinator with the warehouse team, as well as requests from operational departments (Operations, Replenishment, Freight & Customs), helped to highlight the needs. The Board of Directors' auditor, Boris S., also made recommendations in this regard. These factors led to the launch of a working group composed of the General Manager, the coordinators of Human Resources, Operations, Freight & Customs, and Procurement, as well as the two warehouse coordinators.

After holding several workshops, this working group agreed to a restructuring of the warehouse. The new structure consists of a Warehouse Coordinator and three team leaders. Each of these managers will be responsible for specific activities, with defined quantitative and qualitative objectives. This new structure will promote collaboration with future MSF Supply units (Operations, Sourcing, Innovation Solution Support, Quality, Human Resources, Finance) and will provide specific support to MSF Supply Kenya for warehousing.

There are many challenges that lie ahead:

- Revision of the information systems, with the migration from Gold to EGO planned for mid-2027
- Increase in storage and production capacity; improvement in productivity
- Optimised human resources management, through reduced absenteeism, better organisation of breaks and adherence to schedules.
- Introduction of shift work will enable a faster response to emergencies.
- Support for the regionalisation of MSF Supply Kenya and analysis of the outsourcing of storage with 3PL
- Modernisation of tools
- Reduction in errors and improvement in the processing of programme complaints
- Finally, a study on a possible relocation or expansion of the premises is planned for 2030, when the lease expires.



Revision of our information systems

The information systems overhaul project aims to implement tools shared by MSF Logistics and MSF Supply in order to further enhance the management and coordination of our activities.

We have three main objectives:

- 1. TO DEPLOY ERP AND WMS SOLUTIONS ADAPTED TO THE FOUR SITES** (Mérignac, Dubai, Brussels and Nairobi), with effective standardisation.
- 2. TO IMPROVE THE INTEROPERABILITY BETWEEN THE SITES AND THE EFFICIENCY OF LOGISTICS OPERATIONS**
- 3. TO SUPPORT THE MOVEMENT'S AMBITIONS BY IMPROVING DATA QUALITY, REGIONALISATION AND COLLABORATION**

It is important to emphasise that this project is neither a comprehensive strategic plan incorporating all the ambitions of the two entities, nor a reform of organisational governance, nor a single solution to all the challenges encountered.

In 2023-2024, an initial project made it possible to centralise the needs of the two headquarters and identify service providers. This was the prelude to the current project, which was officially launched on 5 May 2025. We are currently in the research phase, dedicated to consolidating our common needs and clearly defining our expectations of the tools. This stage is being carried out in close collaboration with the coordinators and managers of MSF Logistique and MSF Supply, as well as representatives from the operational centres.

2025 has already seen several significant milestones, such as the recruitment and official launch of the team. Active collaboration with two integrators continued throughout the year, as did the definition of future Enterprise Resource Planning (ERP) and Warehouse Management System (WMS) solutions, tailored to our operational and strategic needs.

Several steps are planned for the coming months, which will include finalising the needs assessment and validating the technological choices, scheduled for the end of the first quarter of 2026. This will be followed by preparations for the roll-out phases and change management support across the four sites. Finally, strengthening communication and team involvement will be essential to ensure smooth and successful adoption.





Developing the strategy for 2026-2031 an evolving and collaborative process

2025 was dedicated to the important task of developing the strategy for 2026-2031. This process was carried out gradually, through a series of workshops that enabled us to take stock of the previous strategy and then reflect on the challenges ahead.

Each stage built on the previous one: discussions helped refine MSF Supply's mission, gather the expectations of internal and external stakeholders, and then transform these contributions into shared ambitions. This collective process gradually gave shape to the main strategic priorities and a common narrative, culminating in the definition of specific objectives.

Between workshops, intensive preparatory work was carried out by the strategy committee, coordinators and designated resource persons within MSF Supply, thereby ensuring the coherence, consistency and continuity of the process. The final step will be to organise the clusters, which will be responsible for leading and facilitating this strategy.

Throughout the year, frequent exchanges with the OCB Supply Department ensured alignment with their own strategic ambitions.

This process illustrates the desire to build a solid, ambitious and shared trajectory for the 2026-2031.

Savings realised

In 2025, a number of initiatives enabled MSF Supply and its partners to achieve significant savings. Here is a non-exhaustive list:

KNOWN CONSIGNER

Thanks to our Known Consigner status, our air freight is considered secure when it arrives at the various departure airports. As a result, it does not have to go through the airport cargo security process. In 2025, this enabled us to avoid costs that would have amounted to €334,000.

FLIGHTS FUNDED BY THE EUROPEAN UNION HUMANITARIAN AIR BRIDGE (EUHAB)

Thanks to flights funded by EUHAB, 223 tonnes of freight were sent free of charge (all partners combined). 76 tonnes to the DRC, 53 tonnes to Afghanistan, 57 tonnes to Sudan, 26 tonnes to the Central African Republic and 11 tonnes to Yemen. This amounts to savings of over €1,000,000 for our partners.

CUSTOMS

Our bonded warehouse provides significant advantages to the organisation. It allows us to store items that would otherwise not be permitted in EU and it also allows us to avoid customs duties on certain items (estimated at €284,000 in 2025).

POOLING OF IMPORTS FROM INDIA

The consolidation of imports from India in collaboration with APU and the consolidation of orders from various MSF Supply suppliers resulted in savings of €32,000 in 2025.

NEGOTIATING THE PURCHASE OF GOODS

We estimate that our buyers saved €250,000 thanks to various negotiations conducted during the year.

MANAGING EXPIRY DATES

By communicating with the OCB on a monthly basis to anticipate the risk of destruction (focus on high-value items), we prevented the destruction of medicines worth more than €300,000.

MSF SUPPLY KENYA REGIONAL HUB

The development of the MSF Supply Kenya Regional Hub has enabled the movement to achieve savings of €988,000 in transport costs, compared with transport from Europe.

WE CAN THEREFORE ESTIMATE SAVINGS OF MORE THAN €3.1 MILLION IN 2025.

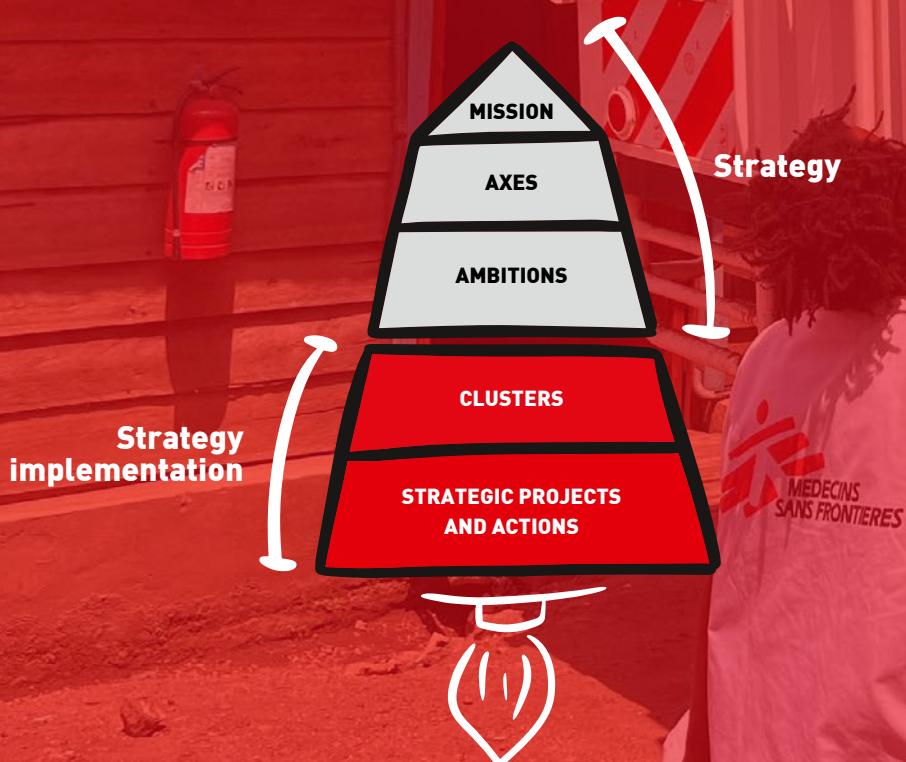
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Advancing the strategy

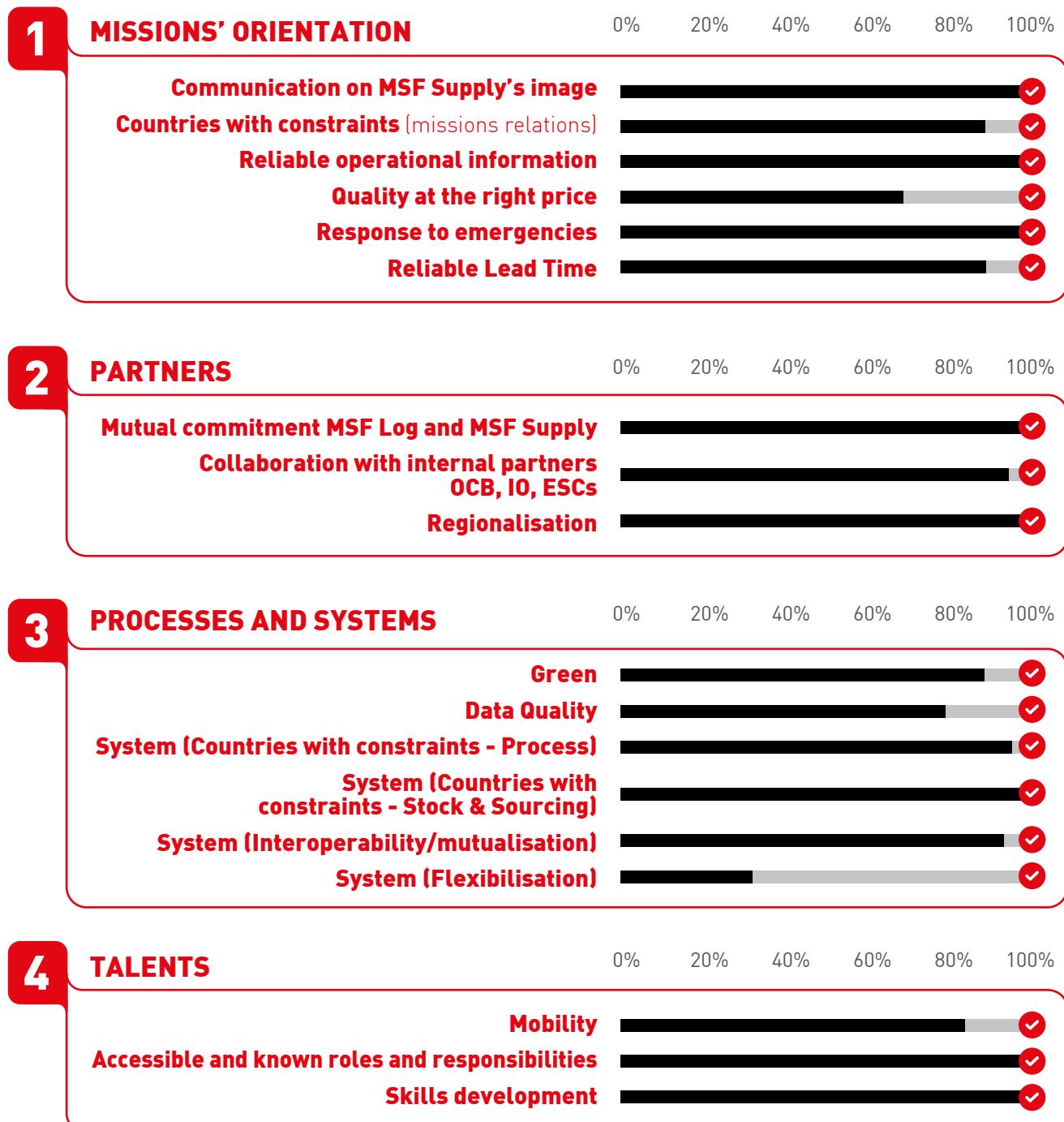
THE 2022-25 STRATEGY IS NOW COMPLETE. A DEDICATED REVIEW HAS BEEN PUBLISHED ON THE SUBJECT, COVERING ALL THE AMBITIONS DEFINED AT THE OUTSET, ALLOWING US TO ASSESS OUR OVERALL PROGRESS AND THE ACHIEVEMENT OF OUR OBJECTIVES.

In total, 16 clusters were set up, 131 actions and 12 projects were implemented! More than 40 people were regularly involved, and 141 cluster committee meetings were held over the strategy's four year period.

In summary, despite the constraints of its environment and availability, MSF Supply achieved the vast majority of its objectives, and certain topics will be continued in the future strategy.



Cluster growth in 2025

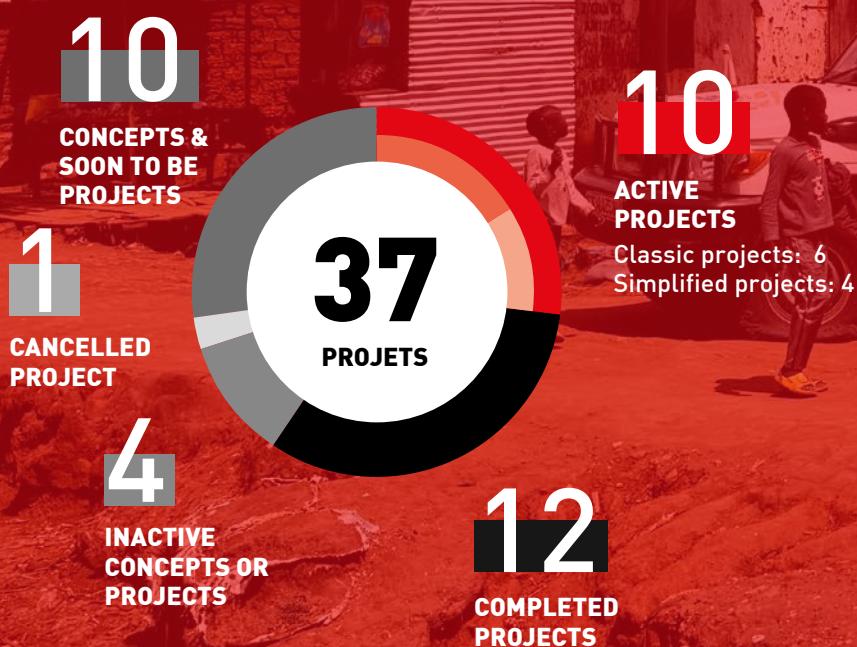


Some clusters were closed even though not all of their actions had been completed or the success criteria had not been fully met. The actions or projects concerned were either carried over to the future strategy where relevant, or cancelled where they were not considered essential to the achievement of specific objectives. All the percentages and adjustments are detailed in the 2022-2025 strategy review.

3

Projects at MSF Supply in 2025

THE NUMEROUS CHANGES MADE TO THE PORTFOLIO IN 2025 WERE ATTRIBUTABLE TO TWO FACTORS – PROJECT PRIORITISATION AND THE OVERHAUL OF OUR INFORMATION SYSTEMS. TAKING THESE TWO FACTORS INTO ACCOUNT SHOULD ENHANCE OUR ABILITY TO ANTICIPATE THE SHIFT IN THE TYPE OF PROJECTS TAKING PLACE FROM 2026 ONWARDS. INDEED, PROJECTS WITH AN IT COMPONENT WILL MAINLY STEM FROM THE REVISION OF THE INFORMATION SYSTEMS PROJECT ITSELF, WHILE OTHER PROJECTS NOT RELATED TO THE REVISION OF THE INFORMATION SYSTEMS WILL FOCUS MORE ON INTERNAL PROCESSES OR EXTERNAL RELATIONS.



In 2025, the project portfolio underwent numerous adjustments, linked both to progress made in terms of organisation (planning committee, prioritisation of IT requirements) and to the overhaul of our information systems. This is reflected in the fall in the number of future projects (22 in 2024, 10 in 2025), several of which were transferred to the revision of the information systems team. The number of completed projects also increased significantly: 11 in 2025 compared to 4 in 2024. Several cross-functional or multi-year projects were completed, despite experiencing significant delays at times. In an organisation such as MSF Supply, emergency response and operations remain a priority and projects can sometimes suffer as a result. Furthermore, while the increase in inter-ESC projects limits our flexibility in terms of deadlines, the benefits of pooling resources should quickly offset these constraints.

With regard to active projects, only those that are mandatory (for technical or legal reasons) or have a strong strategic dimension were launched, ensuring that the necessary resources were available for them to be implemented. Projects led by a dedicated project manager generally progressed more efficiently and in line with the planned schedule.

List of projects in 2025

ACTIVE PROJECTS

UNPACKING MANAGEMENT
REVISION OF THE INFORMATION SYSTEMS
CONSTRAINTS COUNTRIES
RENEWED ACCOUNTING SYSTEM
SINGLE DATA ENTRY (SDE)
GOODS ORDER AUTOMATION (BASEWARE 2)
QUALITY MANAGEMENT SYSTEM IN QUALIOS
NARCOTICS REGISTER
PRICING POLICY
TRANSPORT TENDER

CONCEPTS & SOON TO BE PROJECTS

DELETION OF ARCHIVES
BATCH RELATED CERTIFICATES MANAGEMENT
COUNTRY KNOWLEDGE BASE - EXPEDITION PART
ROADMAP CAA
UNIMEDS MD
POST CONFLUENCE SOLUTION
IMPORT SEA FREIGHT
DANGEROUS GOODS
SUPPLIER PERFORMANCE KPI'S
UNISUP

COMPLETED PROJECTS

INVOICE PROCESSING DIGITALIZATION	HS CODE
NEW QUALITY MANAGEMENT DOCUMENT SYSTEM	NODHOS - UNIDATA LINKAGE
CLAIMS	AUTOMATED SALES PRICING - ASSIGNED
OPTIMIZATION OF KEEP COOL SHIPMENTS	QUALIOS MSF SUPPLY KENYA
SHIIFTIFY - NODHOS INTEGRATION	SHORT SHELF LIFE
	UNIMEDS
	MSF SUPPLY KENYA - PHASE 3

INACTIVE CONCEPTS OR PROJECTS

MED2 - MEDICAL STANDARD LIST
DISSOCIATED MANAGEMENT OF ITEMS/ MANUFACTURERS/ SUPPLIERS
FREIGHT FORWARDING CONTRACTS
LIGHTENING OF THE WAREHOUSE AND OFFICE MSF SUPPLY

CANCELLED PROJECT

PORTAL AND EXTRANET MIGRATION

INFORMATION SYSTEMS REVIEW

NEW TRACEABILITY FEATURES
SHORT SHELF LIFE
PACKING
DIFFERENT PRICES BY TIERS
DASHBOARD DATA QUALITY
SETBACK
AUTOMATION OF GLOBAL EXPENSES
ARTICLE RELATIONSHIP
CRITERIA AFFECTED
ORPHAN ARTICLES

4

Findings for setting 2026 targets



The lessons and proud accomplishments of 2025

2025 was marked by profound changes within MSF Supply. The teams strengthened their collaboration, both between departments and between headquarters, and consolidated their links with the OCB and the GPU. This collective dynamic led to a better understanding of expectations, smoother coordination and greater cohesion between entities. The integration of new talent brought dynamism and expertise, while the agility and commitment of the teams remained essential assets for optimising our processes.

Faced with non-linear activity and a changing geopolitical environment, the teams were able to adapt their strategies and anticipate risks, while, at the same time, our information systems overhaul paved the way for important structural considerations, particularly for the Replenishment department, enabling us to envisage long-term improvements to the organisation and tools we use.

Finally, 2025 also required a high degree of adaptability in terms of mobility and recruitment related to the revision of the information systems project. Despite these challenges, the teams demonstrated remarkable cohesion, great flexibility and constant commitment to supporting MSF Supply's shared mission.

Plans for 2026

2026 will mark the launch of our new strategy for the next six years. To ensure the success of this transition, a number of ambitions have already been identified, reflecting clear continuity with the outgoing strategy, particularly with regard to preparations for the overhaul of our information systems. For MSF Supply, all indicators are pointing to this project, which is set to move up a gear and must be given the best possible conditions for success. Of course, this comes with challenges, such as ensuring stock availability while improving our services, processes and tools.

Finally, in 2026, a new monitoring system will need to be put in place following the closure of the MSF Supply Kenya project. The development of a regional sourcing and procurement dynamic will be essential to ensure the resilience and efficiency of this new structure, while strengthening the overall robustness of MSF Supply.



Internal mobility



MSF Supply