

MEASLES

Supplier meeting

UNICEF Supply Division 3-4 April 2008

Katinka Rosenbom

unite for
children

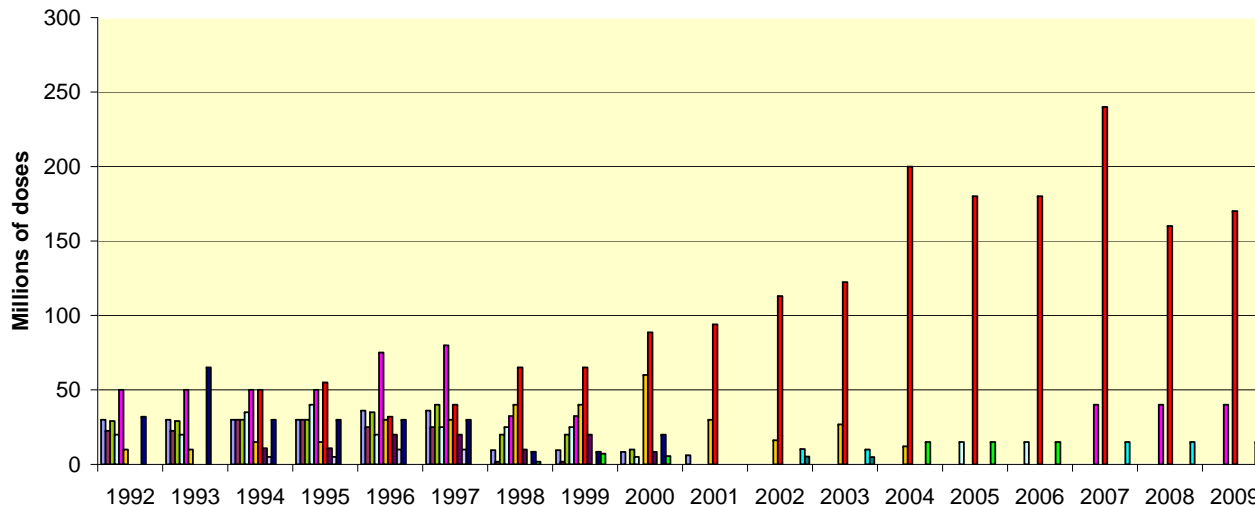
unicef 

Measles Overview

Measles	
Demand Profile	
Presentation	10 dose
Quantity	Around 180-200 million doses/ year
Activity Split: Routine, Campaign	40% routine, 60% Campaign
Demand Volatility: Urgency of Need, Reliability of Demand	Relatively stable; Heavily influenced by campaign planning; Variations due to unplanned campaign activities and outbreaks.
Anticipated duration of Demand	Anticipated continued high levels through 2010 (MDG4), then stabilizing with reduced campaign activities
Trends	stable short term, potential reduced longer
Market Profile	
Development Stage	Post Mature Market
Market Status	3 WHO pre-qualified suppliers
Trends	Declining number of suppliers historically
Vaccine Security Status	
Forecast Accuracy	Acceptable
Funding Profile	Measles Partnership supported; GAVI IC through 2009. Current funding gap from 2009, new funding sources to be identified.
Contracting	3 year LTA following RFP
Supply Status	Good, but high dependency on one source

Measles

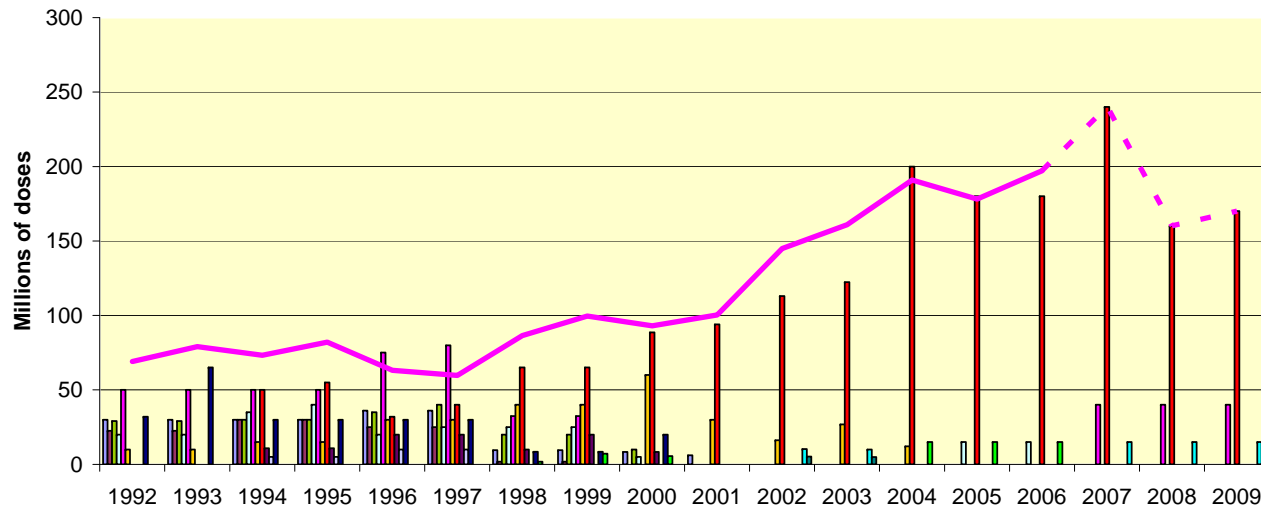
Measles vaccine offered to UNICEF 1992-2009



- Drastic reduction in the number of suppliers offering WHO pre-qualified vaccine to UNICEF over the past 10 years
- Measles containing vaccines are classified as high priority for WHO PQ
- Fragile market, high dependency on one manufacturer
- One supplier exited the market in 2006
- 3 manufacturers offered quantities in the last tender in 2006

Measles demand forecast

Measles vaccine offered to UNICEF 1992-2009

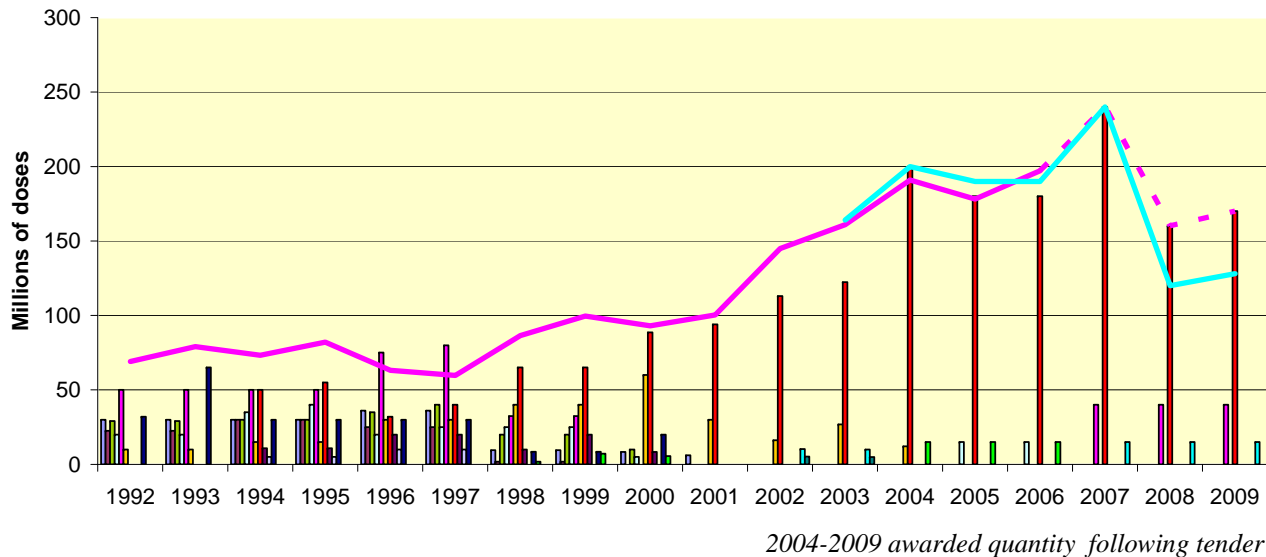


2004-2009 forecast demand at time of tender

- Total forecast demand not awarded to leave room for new suppliers and more adjustment of demand forecast
- No new supplier before 2009
- Additional award recommendations for demand quantity 2008–09 in process

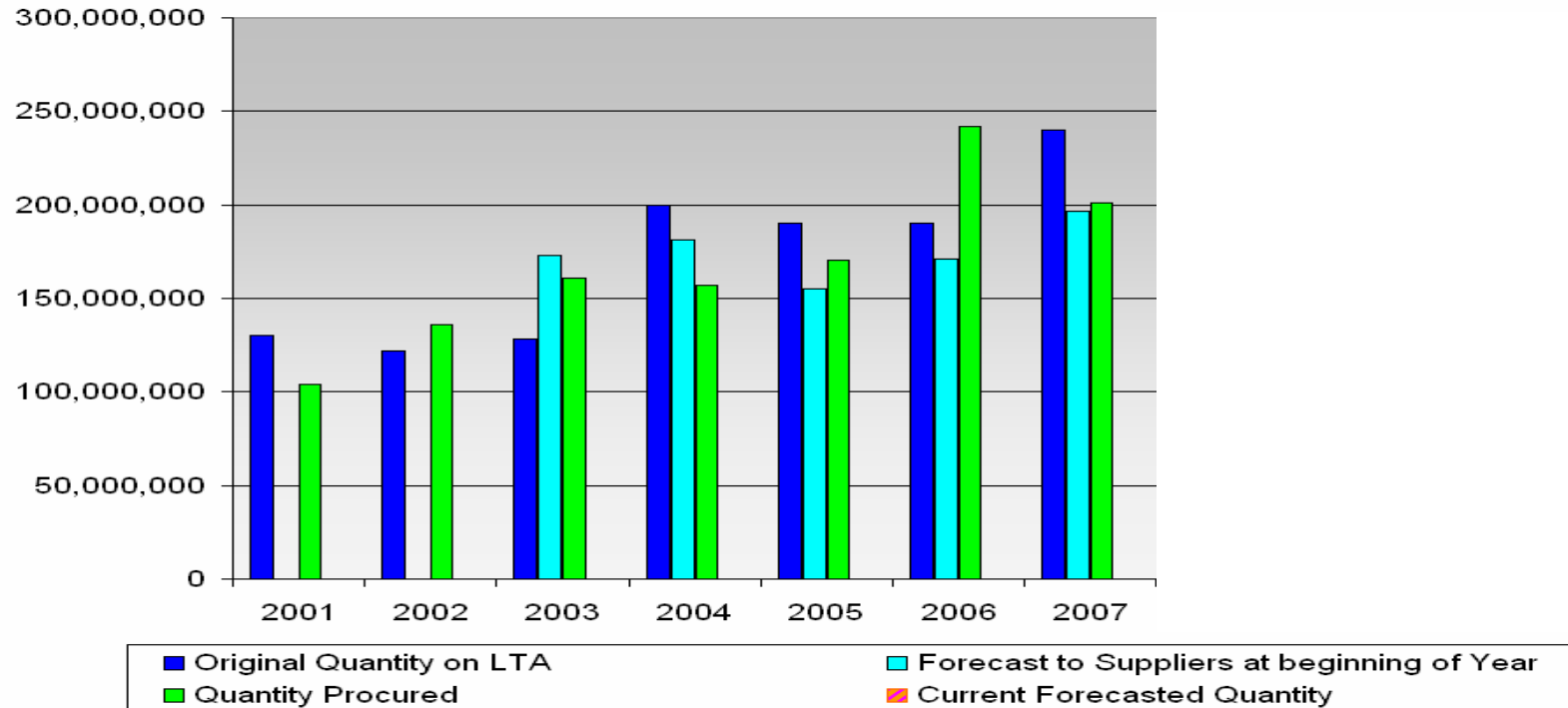
Measles demand forecast

Measles vaccine offered to UNICEF 1992-2009



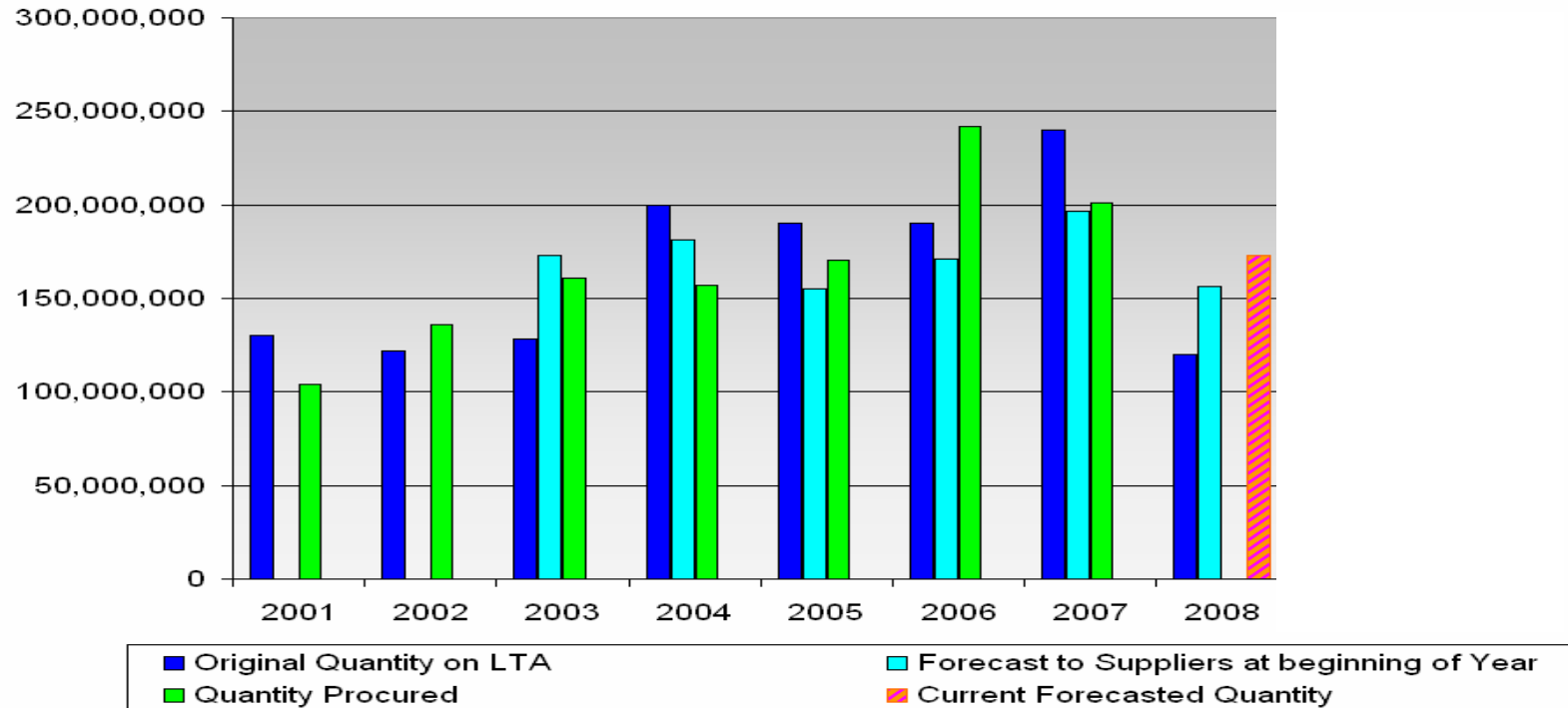
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Mea – Procurement Overview - Historical



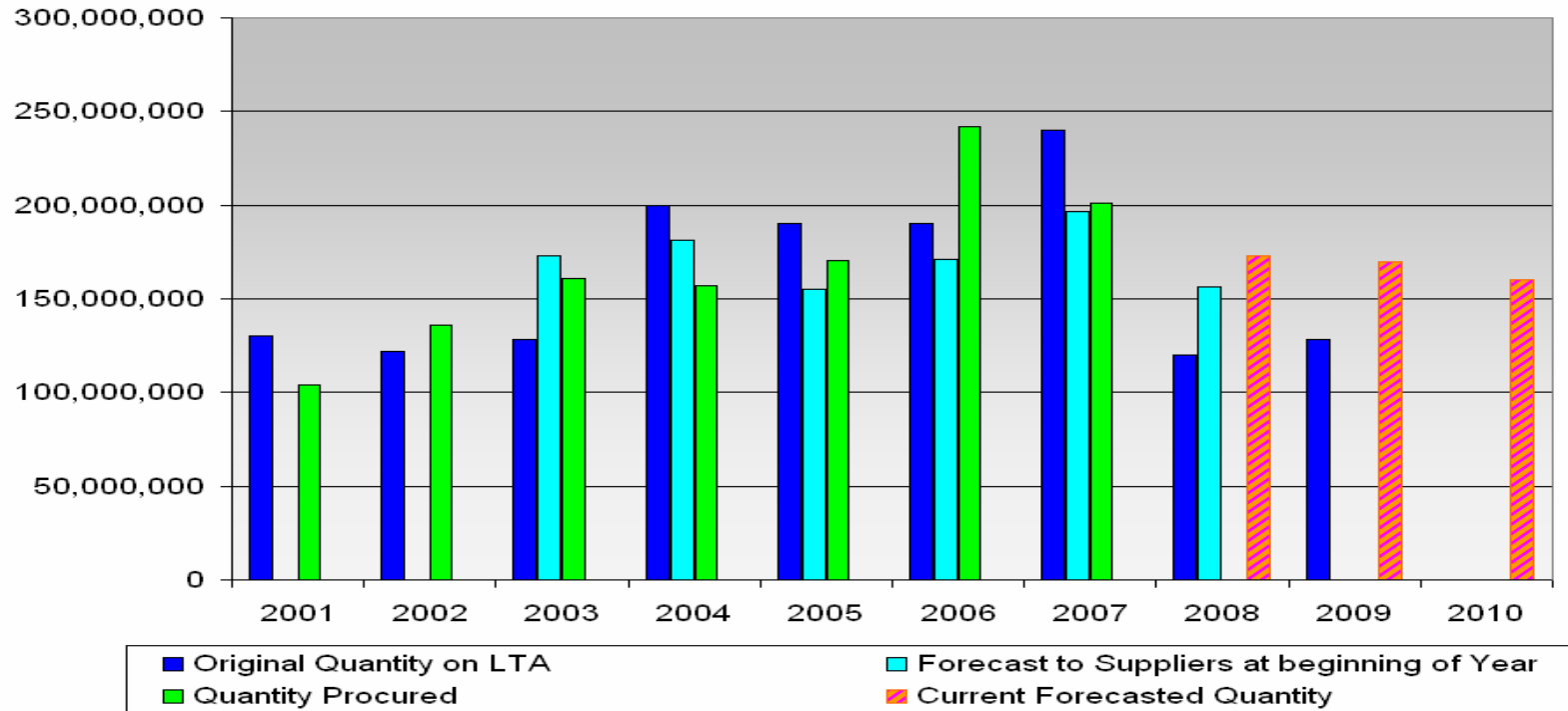
- 2006 peak Year due to campaigns in Bangladesh and Nigeria
- Forecast variations due to changes in Supplementary demand
- Quantities on forecast 2008-09 do not include potential demand for India SIA

Mea – Procurement Overview - Current



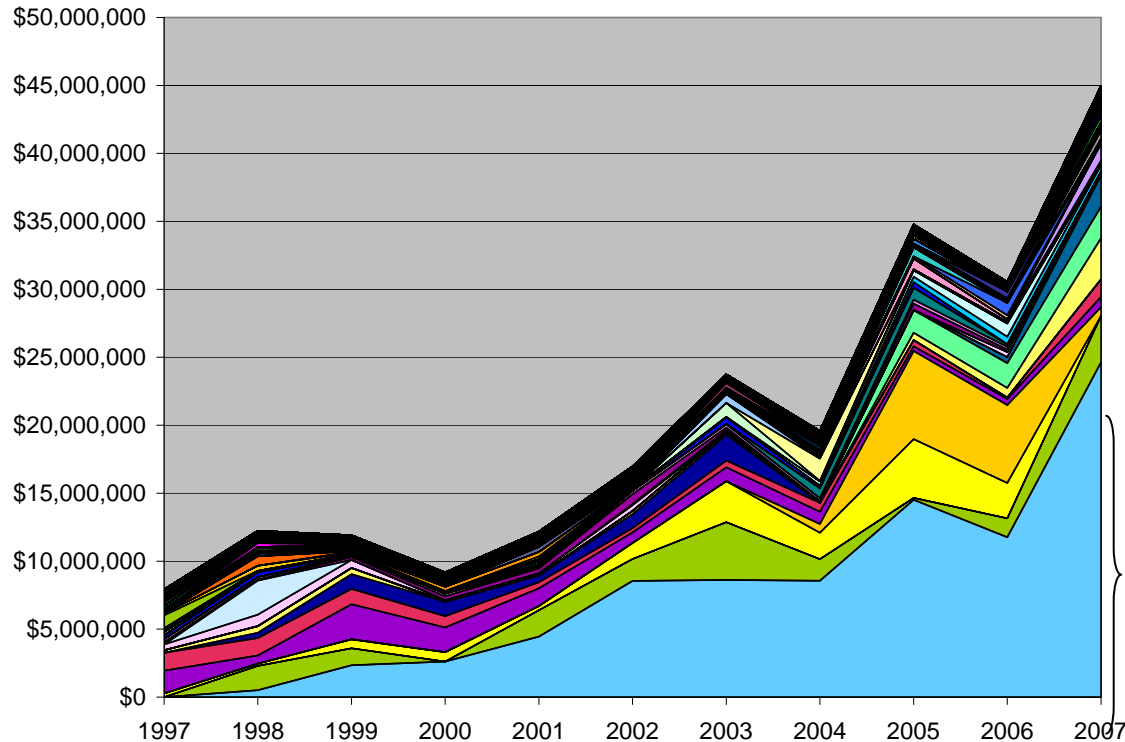
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Mea – Procurement Overview - Future



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Measles – Funding (US\$ Value)



Routine funding from multiple sources; complex but reliable

Measles Partnership provides the bulk of campaign financing, including the GAVI investment casts funding from 2007

A few countries fund their own routine and campaign vaccines

- Significant growth in procurement volume stemming from Measles Initiative campaign activities
- Increased dollar value is also due to significantly increased prices

Specific Issues

1. Finalizing the catch-up campaigns, coordinate for upcoming India demand
2. Expect stabilized demand with;
 - Sustained follow-up campaigns, intervals based on 1st dose coverage
 - Increased routine, including introduction of 2nd dose as per regional specific recommendations

Both posing future funding challenges for countries

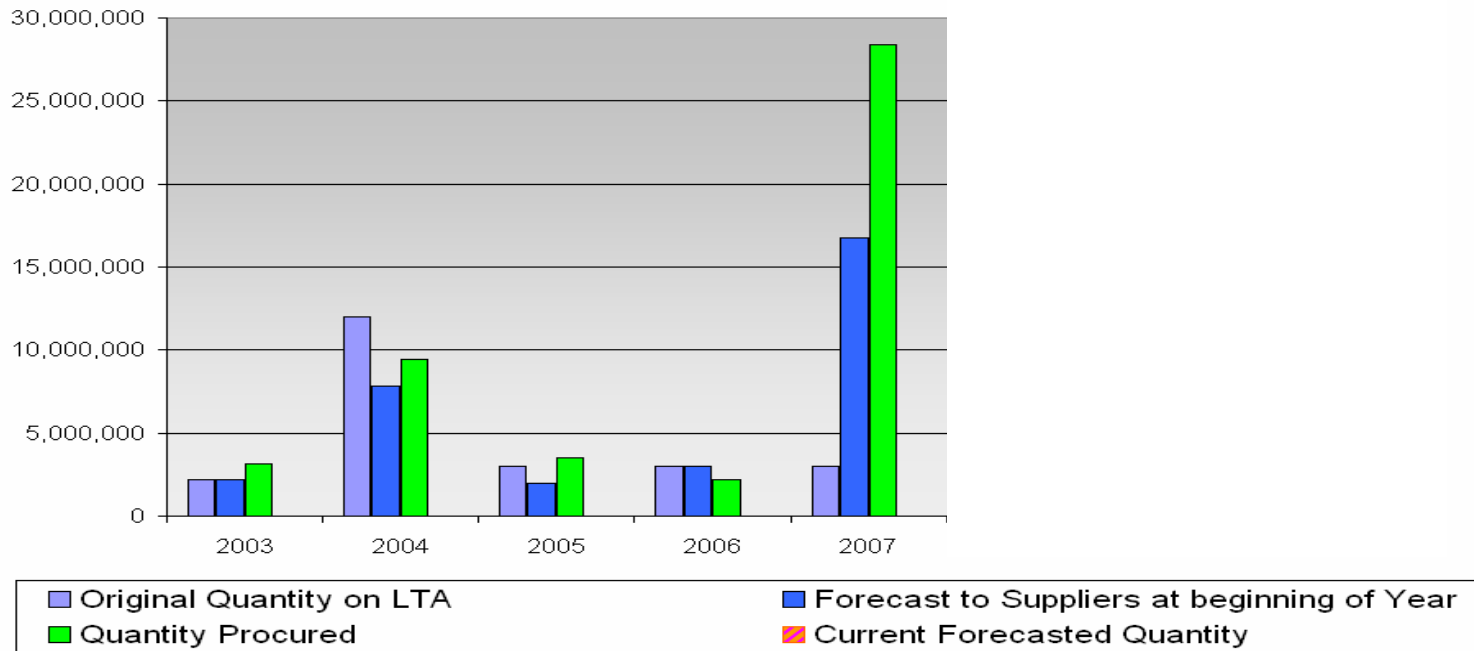
3. Continued monovalent measles vaccine supply needed in the future, even if catch-up campaigns are completed

MR (Measles, Rubella)

MR overview

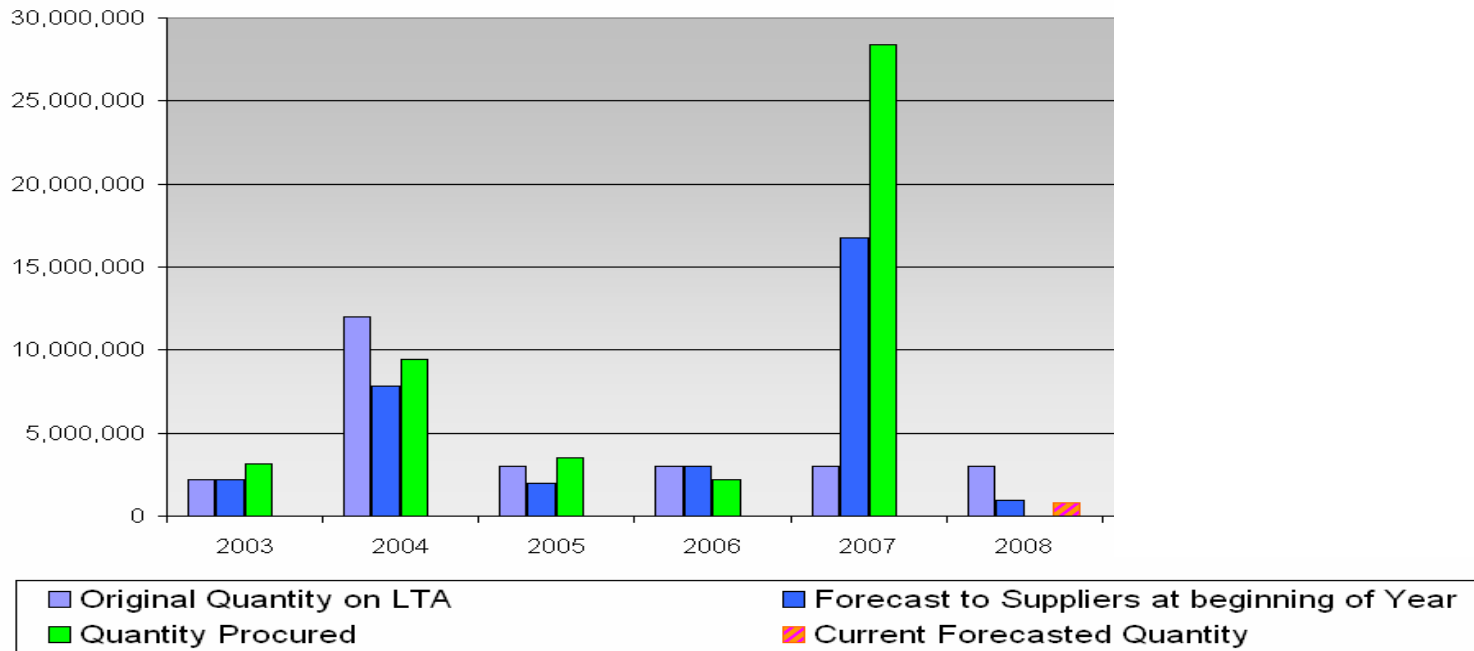
MR	
Demand Profile	
Presentation	10 dose
Quantity	3 mds per year for routine demand, irregular campaign demand
Activity Split: Routine, Campaign	30% - 70% (very sporadic demand due to SIA activities)
Demand Volatility: Urgency of Need. Reliability of Demand	Small demand through UNICEF.
Anticipated duration of Demand	increased activities in 3 regions (EMRO, AMRO, WPRO) no plan yet for AFFRO & SEARO
Trends	MR used to introduce rubella in routine, then demand shifts to MMR
Market Profile	
Development Stage	Fragile market. Limited demand through UNICEF supported programs
Market Status	2 WHO pre-qualified
Trends	Limited interest from suppliers - ' transition vaccine'
Vaccine Security Status	
Forecast Accuracy	Low
Funding Profile	funding available through various channels, including governments
Contracting	3 year LTA following RFP for routine - Specific tenders for campaigns
Supply Status	available with high dependency on one source
Comments: need close collaboration / coordination with PAHO program, and with countries not regularly supplied through UNICEF.	

MR – Procurement Overview - Historical



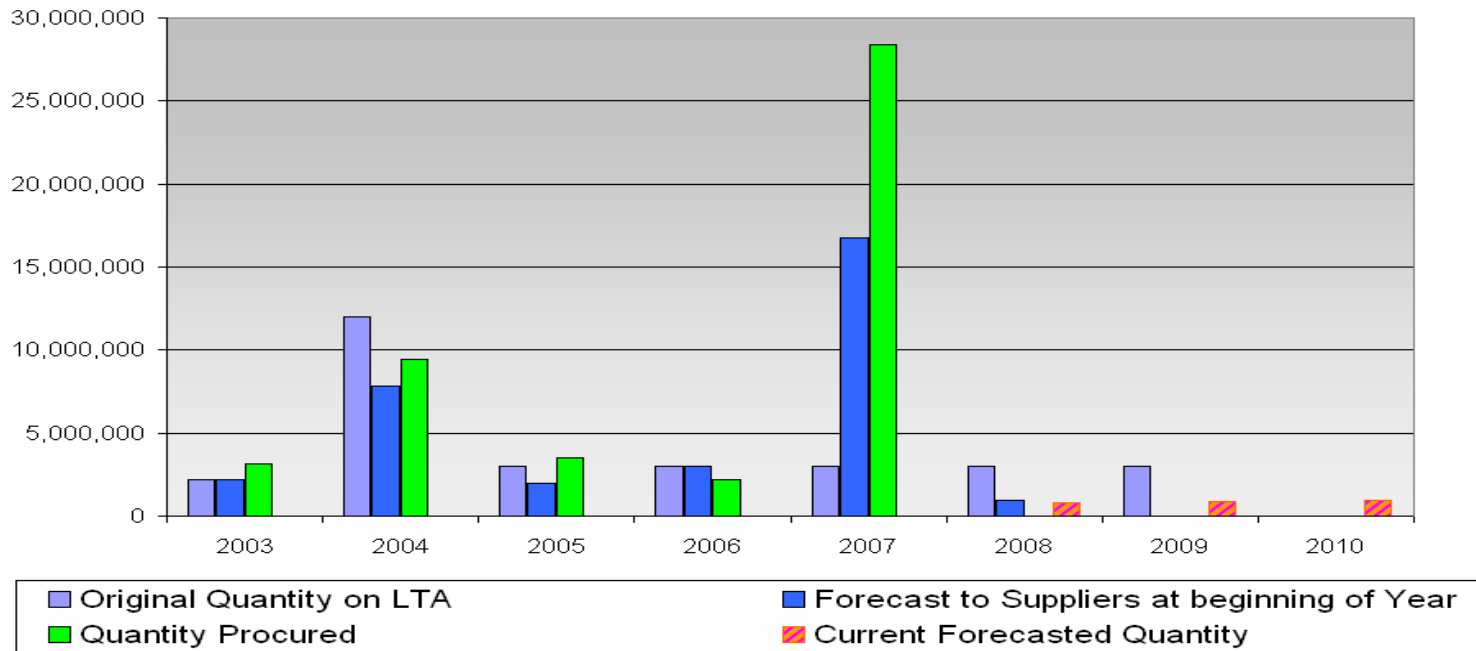
- Historically limited quantities procured by UNICEF, hence any variation has big impact on demand
- High variance in demand due to sporadic campaign demand
- Supply Arrangements for 07-09 covered forecasted demand at time of tender
- 2 WHO pre-qualified suppliers, high dependency on one

MR – Procurement Overview - Current



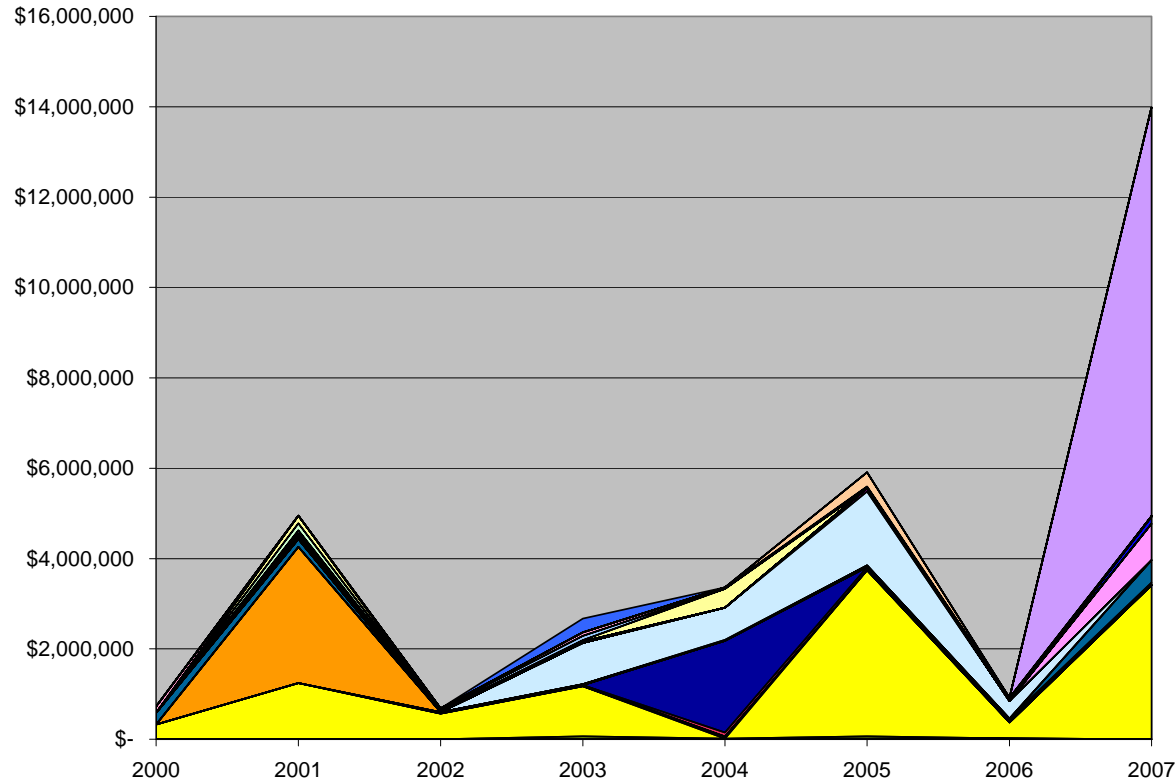
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MR – Procurement Overview - Future



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MR – Funding (UD\$ Value)



- Top 5 funders:
- UNF/CDC
 - GVT Lebanon
 - GVT Turkmenistan
 - GVT Morocco

- Supplied to limited number of countries for routine use
- Supplied through UNICEF for Rubella introduction campaigns, hence one-time funding sources

Specific Issues

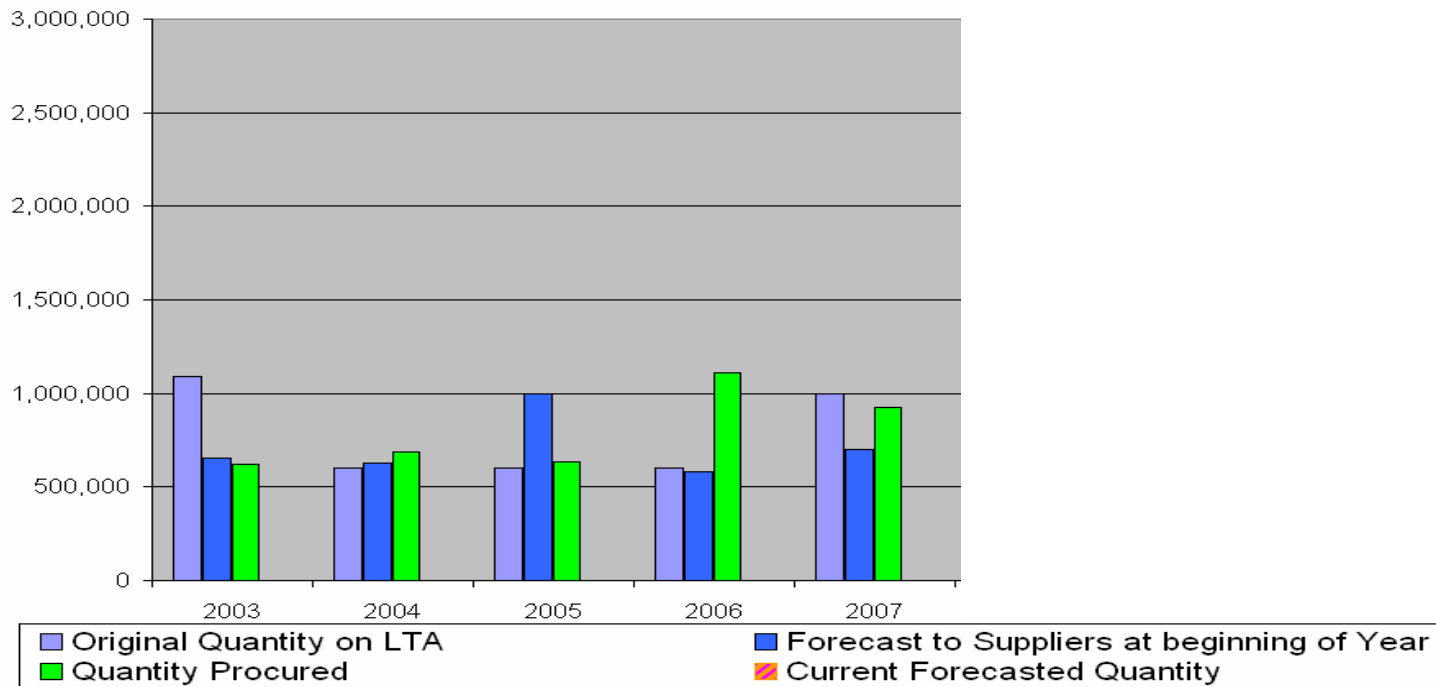
- Tender to be issued for any specific new campaign demand
- Limited external funding available for the rubella vaccine component
- Mea Partnership involvement is structured as support to the measles component only
- UNICEF involvement low as countries focusing on Rubella introductions often have a high degree of self-sufficiency of vaccine supply

MMR (Measles, Mumps, Rubella)

MMR overview

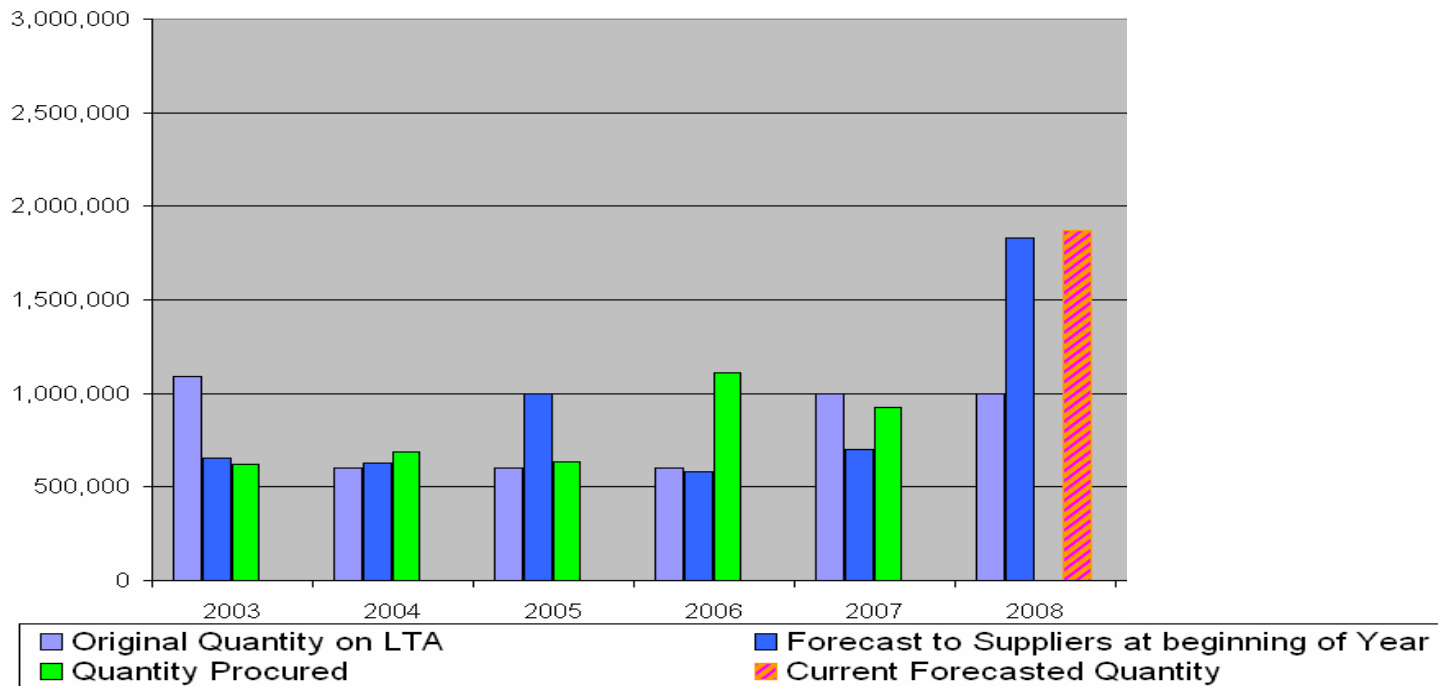
MMR	
Demand Profile	
Presentation	single & 10 dose vial
Quantity	0.5-1 million doses
Activity Split: Routine, Campaign	Routine. Programatic issues with use in campaigns. Occasionally used for response to outbreak of Mumps
Demand Volatility: Urgency of Need, Reliability of Demand	difficult due to specific Mumps strains preference. Low historic demand through UNICEF
Anticipated duration of Demand	continued globally, but limited through UNICEF
Trends	increased globally but limited through UNICEF
Market Profile	
Development Stage	Tight supply market
Market Status	2 WHO pre-qualified
Trends	some improvement, but with continued capacity constraints
Vaccine Security Status	
Forecast Accuracy	low, due to strain issues and low volume
Funding Profile	various channels and countries' governments
Contracting	3 year LTA following RFP
Supply Status	Very tight and Fragile market
Comments: need close collaboration / coordination with PAHO program and countries on strain preferences.	

MMR – Procurement Overview - Historical



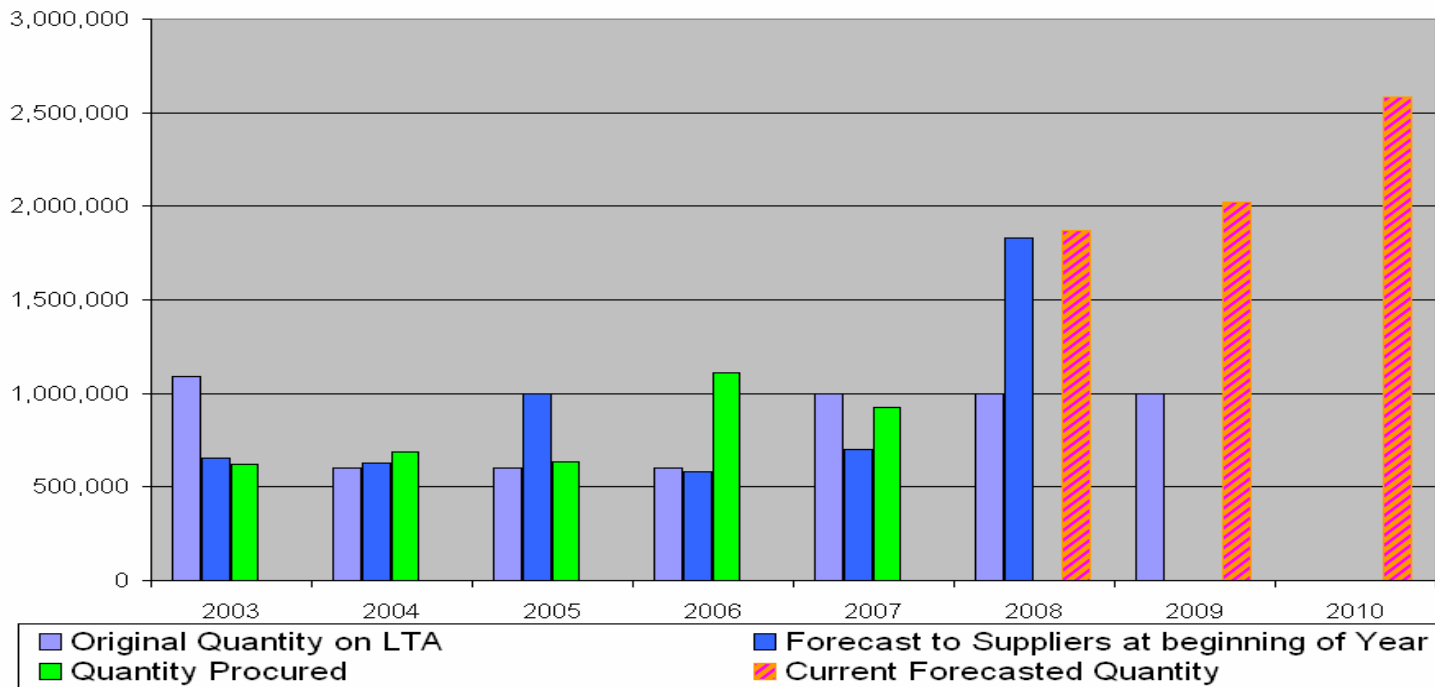
- Significant increase in 2008 & 09 vs original forecast at the time of RFP, mainly due to MR campaigns in 2007
- Total quantities are still small, and verification needed for the demand

MMR – Procurement Overview - Current



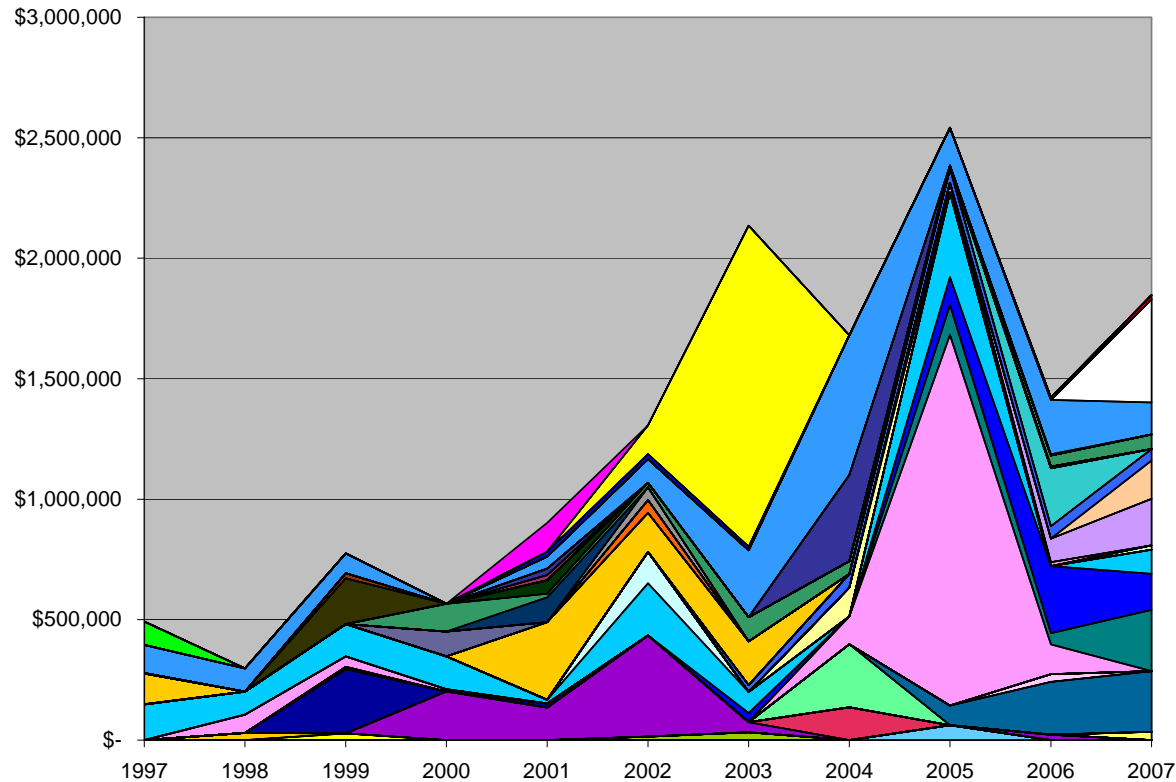
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MMR – Procurement Overview - Future



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MMR – Funding (US\$ Value)



Top 5:

- GVT Albania
- GVT Kosovo
- GVT Kyrgyzstan
- GVT Turkmenistan
- Unicef RR

- Small, ad hoc demand through UNICEF
- Changing funding sources, UNICEF involved in difficult situations

Specific Issues

- Strain preferences
- Very limited availability for unplanned demand
- Large price differences between different products
- Limited sustainable external funding available – countries need to include in their own budget
- UNICEF procurement only in specific instances, or supporting smaller populations in dire circumstances

Thank You