DAY 2

VACCINE MARKET UPDATE
PCV
WHO recommends that PCV should be included in every country’s National Immunization Program (NIP), especially in countries with high PD burden. By the end of 2022, Pneumococcal vaccine had been introduced in 166 countries, with the big rise in PCV coverage from 51 to 60% between 2021 and 2022*. Big increases in India (25 to 66%), Indonesia (1-6%), Philippines (51-71%), Samoa (3-36%), Brazil (69-81%), Burkina Faso (66-91%), Ecuador (62-71%), Eswatini (63-96%), Guatemala (72-84%), Myanmar (40-57%), Paraguay (62-74%), Rwanda (88-98%), Vanuatu (2-42%), and more. But there is wide variation between regions and countries.

The Pneumo AMC initiative launched in 2009 has opened access to PCV in low and lower-middle income countries, with unprecedented low prices of USD 2.0 – 3.3 per dose. UNICEF has procured 1.43 billion doses of PCV since 2010 through the AMC framework for Gavi 73 countries. PCV procured through the AMC is projected to prevent more than seven million childhood deaths by 2030. The AMC was terminated on 31st Dec 2020 and, all last AMC doses are being delivered to countries. The existing supply agreements are valid until expiry.

Through the first non-AMC tender in 2022, UNICEF has secured continuous access to PCV prices for all Gavi 73 countries up to 2030, including fully transitioned countries, providing countries with long term visibility on pricing for planning and budgeting.

* WUENIC data
86% of Gavi 73 countries have introduced PCV.

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**Others**

- Indonesia**
- Tajikistan
- Chad
- Timor-Leste**
- Comoros
- Cuba**
- Guinea
- Korea DPR
- Somalia
- South Sudan
- Ukraine**
- Sri Lanka**
- Vietnam**

**Legend**

- Introduced
- Pending
- Approved

PCV Intro's in Gavi 73
Only 73% of MICs have introduced PCV, a few MIC countries expressed their interest to introduce.

Several countries have delayed introduction due to financial constraints.

UNICEF has set up contractual frameworks through which non-Gavi middle income countries (MICs) can access PCV at unprecedented low prices, starting at US$2.90 per dose.
First decade (Mkt dev)
• AMC $1.5B facility
• 8-LTAs
• $1.23B subsidy
• 1.43B doses shipped
• 63 Country intros.

Second Decade (Stability)
• First non-AMC
• Sufficient supply with a fair balance in market shares
• 13 LTAs, including for MICs
• Sustainable prices
• Further diversification of the supplier base in the medium term.
• Buffer capacity/inventory

Non-AMC tender for Gavi 73 to secure additional 1,10B doses
• There’s increasing share of Country co-financing and self financed orders (PS)
• The trend is expected to continue, with sharp increase as more countries transition fully, hence countries will be more sensitive to prices and product switches are possible
• Sufficient supply and stable and affordable pricing is critical for PCV programme sustainability
CHALLENGES AND NEXT STEPS

Issues and Challenges

• Sufficient supply but little room for sudden and substantial quantity changes due to production lead time. Long term reliable forecast and timely financing from countries are vital

• Increasing price sensitivity as countries co-financing increases. Maintaining diverse supplier base with sustainable market shares for a healthy market could be a challenge as possible product switches may impact sustainable demand

• COVID-19, related stagnation in PCV coverage is over. There is an increase in demand due to plans to catch up missed cohorts and new introductions

• Termination of AMC in 2020 removes the financial incentive framework that supported current PCV manufacturers, presenting new entrants with an additional hurdle compared to incumbents

Steps Forward

• Work with countries to support PCV introduction in the remaining Gavi 73 countries.

• Initiate new tender in medium term to facilitate additional awards and entry of new manufacturers to the market

• Support affordable, stable and sustainable pricing for countries and offer Governments innovative financing options to ensure timely financing and uninterrupted supply

• Increase inventory in countries and timeliness of supply to meet demand

• Continue to work with industry and countries to expand the MIC framework to facilitate new introductions at sustainable prices

• Work with countries to strengthen forecasting and budgeting capacity.