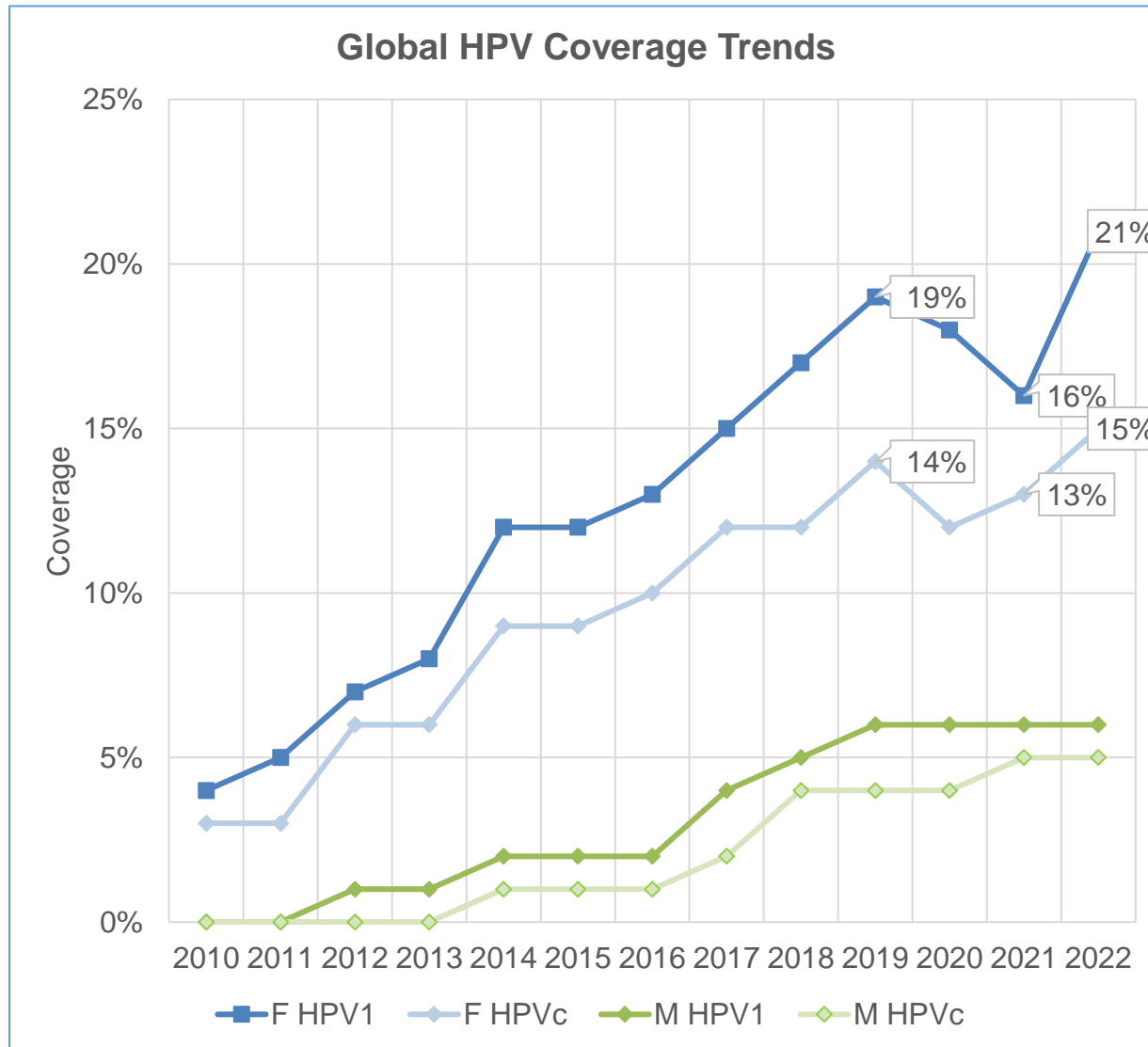


DAY 3

SESSION 21
VACCINE MARKET UPDATE
Human Papillomavirus (HPV) Vaccine

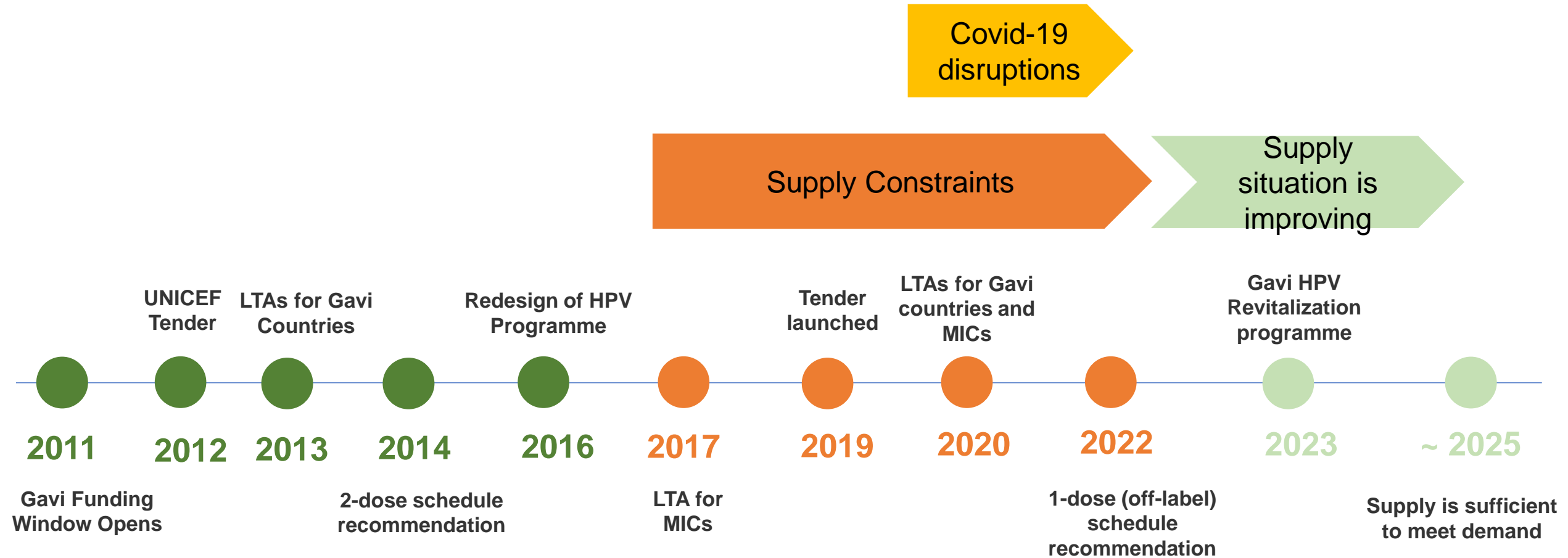
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CONTEXT



- 134 WHO member states have introduced HPV, including 54 countries with gender neutral vaccination.
- 1-dose schedule decision: 30 countries
- HPV vaccine coverage is recovering and has surpassed pre-pandemic levels but remains below the 2030 cervical cancer elimination goal.
- Coverage in Low- and Middle-Income Countries (L/MICs) has improved but remains below 2019 levels.
- Coverage improvements are due to new introductions in L/MICs and resumption of programmes interrupted by COVID or supply challenges.
- 57% of global cervical cancer cases occur in countries yet to introduce HPV vaccine.

Market Evolution



Gavi Supported and Transitioned Countries

2010	2014	2016	2017	2018	2019	2020	2021	2022	2023	2024	Others	
Bhutan**	Rwanda*	Uganda*	Sri Lanka**	Armenia**	Côte d'Ivoire	Georgia**	Mauritania	Lesotho	Cambodia	Mali	Afghanistan	Niger
				Ethiopia	Kenya (21/22)	Cameroon	Sao Tome & Pr.	Burkina Faso	Bangladesh		Benin	Pakistan
				Senegal	Liberia	Myanmar		Mozambique	Nigeria		Burundi	Papua NG
				Tanzania	Malawi	Lao PDR		Sierra Leone	Togo		CAR	Rep. of Congo
				Zimbabwe	Moldova**			Eritrea	Timor Leste**		Chad	Rep. of Sudan
					Uzbekistan** (21/22)			Kyrgyzstan	Mongolia**		Comoros	Somalia
					Zambia				Kiribati**		Congo DR	South Sudan
					Gambia						Djibouti	Syria
					Solomon Island						Ghana	Tajikistan
											Guinea	Yemen
											Guinea-Bissau	Angola**
											India	Azerbaijan**
											Korea, DPR	Ukraine**
											Madagascar	Viet Nam**
											Nepal	

	Introduced
	Introduced, pending multi-age cohort
	Introduced with multi-aged cohort
	Approved pending introduction
	Countries not yet applied for Gavi support
	Gavi transitioned countries not yet introduced

* Countries approved prior to Gavi's HPV programmatic change in Dec 2016

** Gavi transitioned countries (self-financing)

- Routine introductions: 20 countries
- Routine plus multi-age cohort (MAC): 11 countries
- Approved, pending introduction: 7 countries
- Pending MACs: 13 countries

Middle Income Countries

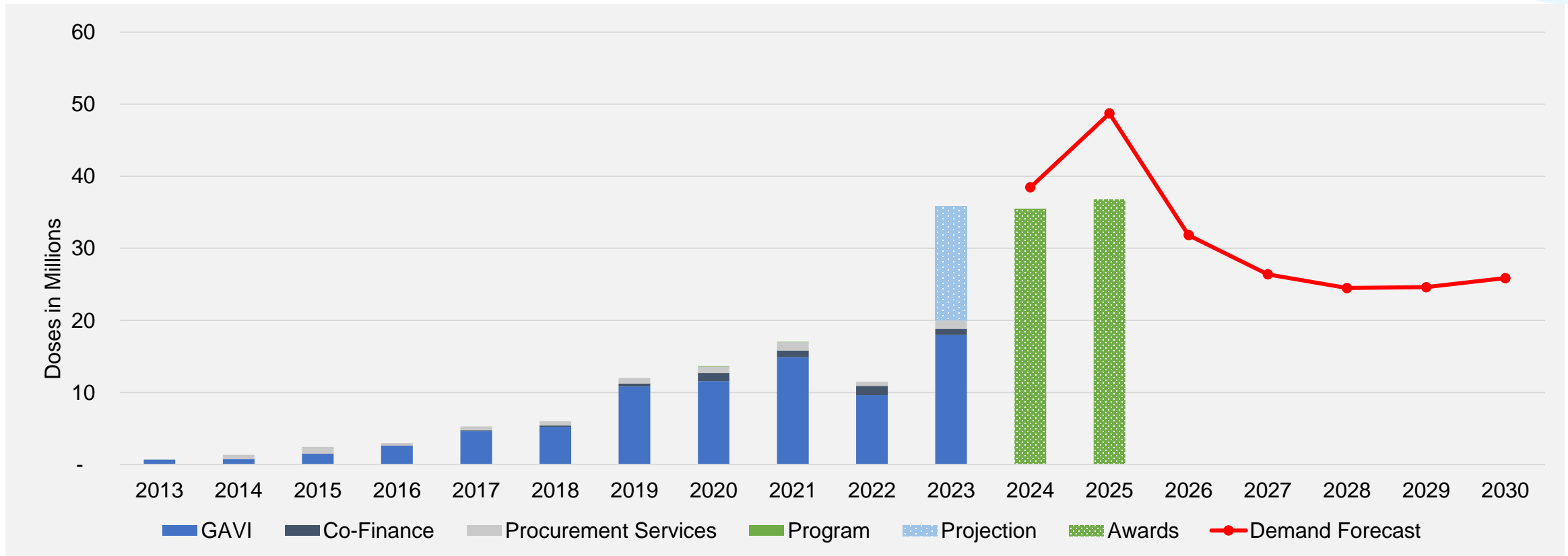
UNICEF Region	Country	Income group	Introduced (Y/N)
ECARO	Albania**	UMIC	Y
	Belize	UMIC	Y
	Bosnia and Herzegovina	UMIC	Y (P)
	Bulgaria	UMIC	Y
	Montenegro	UMIC	Y
	North Macedonia	UMIC	Y
	Serbia	UMIC	Y
	Turkmenistan**	UMIC	Y
	Kosovo**	UMIC	N
	Belarus	UMIC	N
	Kazakhstan	UMIC	N
	Romania	UMIC	N
	Turkey	UMIC	N
MENA	Libya	UMIC	Y
	Morocco**	LMIC	Y
	Tunisia	LMIC	N
	Algeria	LMIC	N
	Egypt	LMIC	N
	Iraq	UMIC	N
	Islamic Republic of Iran	LMIC	N
	Jordan	UMIC	N
	Lebanon	LMIC	N
	State of Palestine	UMIC	N
Syrian Arab Republic	LMIC	N	

UNICEF Region	Country	Income group	Introduced (Y/N)
EAPRO	Cook Islands**	UMIC	Y
	Fiji**	UMIC	Y
	Malaysia	UMIC	Y
	Marshall Islands	UMIC	Y
	Micronesia	LMIC	Y
	Nauru**		Y
	Niue	UMIC	Y
	Philippines	LMIC	Y (P)
	Samoa**	LMIC	Y
	Thailand	UMIC	Y
	Tonga**	UMIC	Y
	Tuvalu**	UMIC	Y
	Tokelau**		N
	Vanuatu**	LMIC	N
China	UMIC	N	
ESARO	Botswana**	UMIC	Y
	South Africa	UMIC	Y
	eSwatini**	LMIC	N
	Namibia	UMIC	N
ROSA	Maldives**	UMIC	Y
WCARO	Cabo Verde**	LMIC	Y
	Equatorial Guinea	UMIC	N
	Gabon**	UMIC	N

Key	
	Introduced
	Planning to introduce in 2023/2024
	Not yet introduced
**	Procured through UNICEF

➤ 17 countries procuring through UNICEF

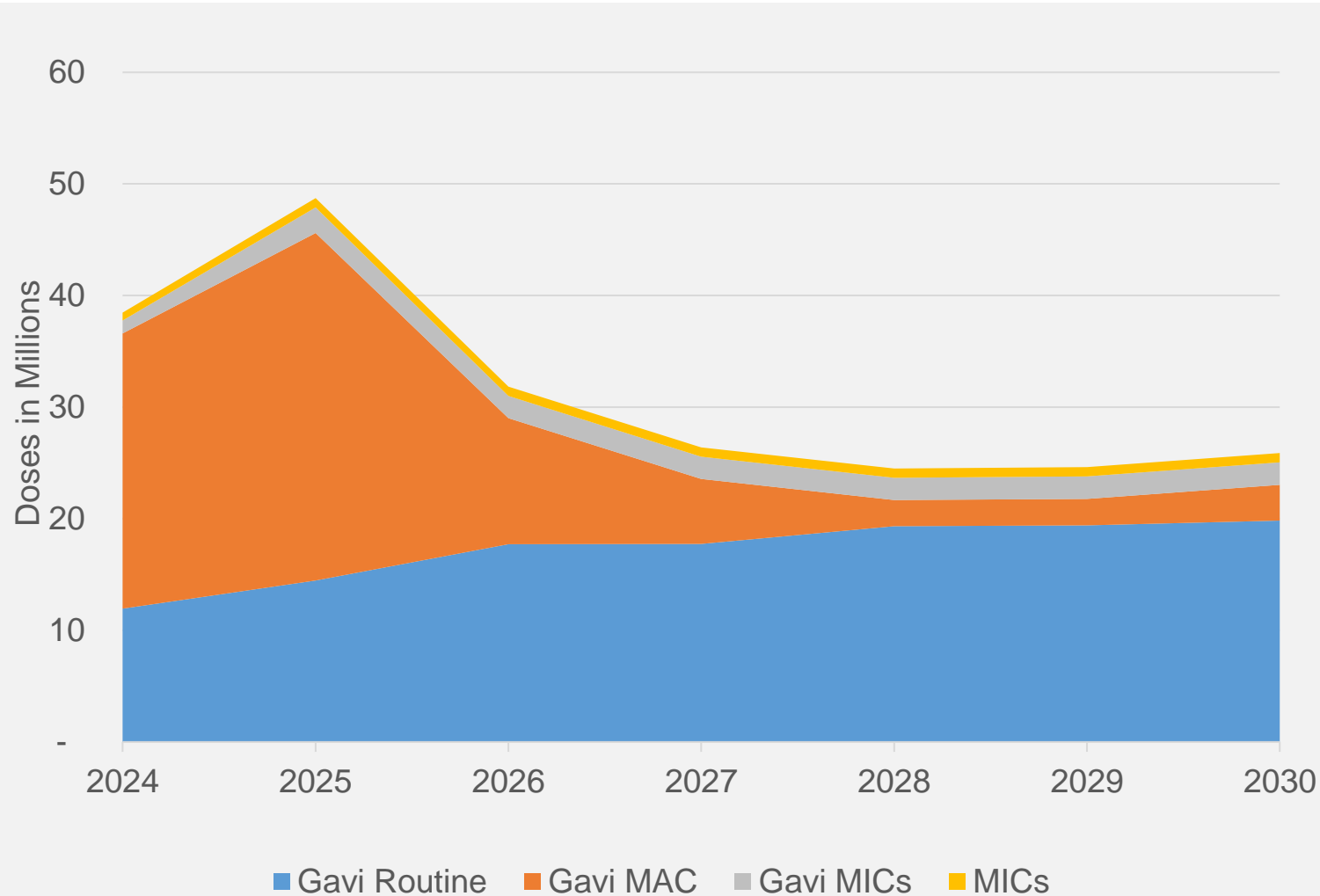
Supply and Demand Update



Demand forecast includes Gavi catalytic support for India and excludes Indonesia

- Procurement volume from 2013 to date: **93 million doses**
- 3 LTAs for Gavi countries: **MSD, GSK and Xiamen Innovax**
- 2 LTAs for MICs: **MSD and GSK**
- **Supply availability is improving, needs careful planning in 2024 and is anticipated to meet demand in 2025 depending on product preference.**
- Additional awards are anticipated to be made for 2024/2025 depending on timing of forecasted introductions.

HPV Vaccine Demand Forecast



Demand forecast includes Gavi catalytic support for India and excludes Indonesia

- Demand forecast includes demand for Gavi supported and transitioned countries, Gavi MICs and other MICs procuring through UNICEF.
- Demand forecast assumes that Gavi supported and transitioned countries will transition to 1-dose schedule by 2025.
- Demand forecast peaks in 2024 and 2025 due to delayed MACs in 9 countries and introduction in India (Gavi Catalytic Support).

Issues and Challenges

- Imbalance in demand of appropriate products and little/ no uptake of new products. Supply will continue to need careful planning until 2024.
- Timing of implementation of the 1-dose schedule not confirmed in 12 countries and may have an impact on the demand forecast for 2024.
- Vaccine affordability remains a concern for middle income countries.

Steps Forward

- Engagement with the industry on changes to the demand forecast following implementation of 1-dose schedules.
- Consolidate multi-year demand for MICs and encourage countries to submit multi-year commitments.
- Improve access to affordable HPV supply for MICs and increase transparency of prices secured for MICs.

QUESTIONS



DISCUSSION

THANK YOU

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