**MARKET & SUPPLY UPDATE**

**bOPV**

**CONTEXT**
- UNICEF has made initial awards for bOPV through to end 2024 to secure sufficient supply to meet the projected needs for the Endemics and country routine requirements for around 85 countries. Ensuring a buffer capacity to respond to unplanned demand is critical in the current epidemiologic situation.
- By Q3 2023, a considerable reduction in bOPV demand has materialized for the year due to the cancelation of the GPEI Preventative SIA calendar for 2023. UNICEF is working with suppliers on how to best manage the supply surplus and address potential future shelf-life issues as necessary, balancing supply and demand.
- With the setbacks in polio eradication efforts due to Covid-19 pandemic of and detection of new wild poliovirus type 1 (WPV1) cases in the Southern African region in 2022 and ongoing outbreak response, and in line with the GPEI Polio Eradication Strategy 2022-2026, UNICEF expects that bOPV supply will be required through to at least 2027. A re-assessment of demand and supply is currently ongoing, with the intent to make further awards for 2024 and beyond to provide visibility for industry.
- In 2021 the GPEI launched the Polio Eradication Strategy 2022-2026 "Delivering on a Promise". While overall the bOPV demand is expected to be around 600-700 million doses annually over the coming years based on the GPEI placeholder SIA calendar, risks of spread beyond current countries is a concern due to low population immunity in a number of countries and in subpopulations which may lead to increased demand.

**SUPPLY & DEMAND**

In 2022 and 2023 UNICEF made awards to seven OPV manufacturers having vaccines prequalified by WHO for supply in 2023 and 2024 based on the GPEI forecast. Awards were made in line with tender award criteria, including product presentations and licensure in multiple countries. Due to the cancelation of the GPEI Preventative calendar for 2023, awarded supply is currently above the needs. UNICEF is working with contracted manufacturers to best manage the situation, which leads to high stock levels by the end of 2023.

**ISSUES & CHALLENGES**

**Epidemiology:** The current situation requires supply capacity to respond to unplanned needs at short notice in case of further spread of WPV1 and increased cases of cVDPV1; and for the longer term beyond 2023 through to at least 2027.

**Licensing requirements:** Country specific requirements reduce UNICEF’s ability to maximize allocations of available supply.

**Supply:** A need to maintain sufficient capacity of bulk and filling to meet the programmatic needs through to interruption of WPV1 transmission, certification and cessation four years later. Challenges in meeting manufacturers minimum requirements in a declining market through adjusting the supplier base.

**LOOKING AHEAD**
- In 2022 and 2023 bOPV demand for countries procuring through UNICEF was reduced due to the cancelation of preventative campaigns in non-endemic countries due to GPEI budget constraints.
- GPEI is currently assessing their projected requirements for 2024 through to cessation.
- Based on the GPEI SIA calendar published by GPEI, UNICEF expects that demand will be around 700M doses in 2024, pending outcome of GPEI assessment.
- Year to Date (YTD) in 2023 UNICEF has procured 201 million doses for outbreak response campaigns in the African region.
- Further WPV1 detection globally could lead to increased demand as GPEI responds to outbreaks, which will draw on available supply.
- Demand is currently projected to continue to at least 2027.

**FURTHER QUESTIONS OR ADDITIONAL INFORMATION? PLEASE CONTACT:**

Jason Thompson
Contracts Officer
jthompson@unicef.org

https://www.unicef.org/supply/