MARKET & SUPPLY UPDATE

Japanese Encephalitis Vaccine (JEV)

CONTEXT

- 3 billion people in 24 countries are considered at risk for JE.
- 80-100 million doses of JEV procured per annum in the Global market.
- Significant gap between the population at risk and vaccine demand.
- 14 JEV vaccine manufacturers; 3 with WHO-prequalified JEV vaccines (JEV).
- It is essential to note that while the current supply of JEV vaccine is sufficient to meet the demand of the countries, careful consideration and planning are necessary due to the significant lead time of 6 months.

SUPPLY & DEMAND

- Demand for JEV is characterized by peaks and troughs due to the seasonal nature of transmission and introductory campaigns.
- Country product preferences still heavily favour a single-dose schedule in a five-dose vial presentation. Currently, all country demand through UNICEF is covered by JEV vaccines from CDIBP.
- The first Gavi-supported JEV vaccine campaign started in Laos PDR and was followed by supported campaigns in Cambodia and Nepal with the latest in Myanmar in 2018.
- All current demand for JEV vaccine through UNICEF is from self-financed countries, except Myanmar.
- The drivers of country preference are product presentation, dosing schedule and price.
- Following the conclusion of the 2018 tender, there have been no new country applications for introduction of JEV. Thus, demand under the current tender period 2019-2023 is driven by routine use.

ISSUES & CHALLENGES

- JEV forecast accuracy remains a challenge as past projections for introductions since 2018 have not materialised.
- The JEV vaccine has a shelf life of 24 months, of which six months are required for batch release processes. Only 18 months of vaccine shelf life remains upon its release and shipment. This creates constant pressure on procurement lead times.
- Despite UNICEF and Gavi offering to support countries to introduce JEV vaccines into their national immunisation programmes, several JEV endemic countries have still not applied for national introduction.
- Since 2014, the price of JEV vaccines from CDIBP have increased twice, yet price remains six times lower than the next available WHO prequalified vaccine.

LOOKING AHEAD

- Work with UNICEF Regional and Country Offices, WHO, Gavi and other global partners to gain more information on JEV demand and timing of introductions in at-risk countries and smoothen the peaks/troughs of demand.
- Following UNICEF’s issuance of a provisional award to another manufacturer with WHO-prequalified vaccines in 2018, there has been no materialised demand. UNICEF will continue to work with countries to generate demand.
- UNICEF will continue to liaise with countries to encourage early planning for routine programmes and campaigns to account for current lead times and shelf-life limitations of the JEV vaccine.
- UNICEF, Gavi and partners are reviewing JEV vaccine forecast accuracy, demand, and supply availability and will assess the need to issue a new tender subsequently.

VACCINE INDUSTRY CONSULTATION 2023

FURTHER QUESTIONS OR ADDITIONAL INFORMATION? PLEASE CONTACT:

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