JE Endemic Region
JEV market evolution

3 billion people in 24 countries considered at risk for JE
80-100 million doses of JEV procured per annum in Global market
Huge gap between the population at risk and demand
80-90% market share dominated by one supplier
14 JE vaccine manufacturers
3 have WHO PQ.
The drivers of country preference are product presentation, Dosing schedule and price.

The price difference observed in the market is 5 to 20X the lowest offer preferred by countries.
10-20% of global demand is through UNICEF
32M doses procured to date at a value of USD 12M

Historical Procurement: 1.8M, 8.6M, 6.1M, 18.0M
Current Routine Demand: 2.7M, 1.2M, 1.3M, 3.98M, 3.38M, 4.47M, 5.97M
New Introduction: 2nd tender concluded to cover 2019-2020
Contracted Vol.: Countries were not ready to self-finance for routine. Gavi policy was changed to support both Catch up Campaign and Routine.
Summary and Next Steps

Market dominance by the preferred product from one supplier, a risk to vaccine security for UNICEF market and globally -

UNICEF calls on industry to be responsive and continue collaboration to improve JEV product characteristics to meet country and programme needs.
Continuous engagement with manufacturers through consultations and solicitation process to give additional suppliers a foothold in JE market.

The catch up campaigns drive the peaks and troughs in JEV market demand and this poses potential risk of a surge in demand that could exceed the current capacity in the market.

UNICEF, Gavi and partners will support countries to prepare for introductions, stagger applications and approvals timelines to avoid concurrent catch up campaigns in the same period.

Demand uncertainty makes quantification and forecast accuracy a challenge, as long as the countries have access to quality JE vaccine, the objective of averting mortality will be achieved.

Work with partners to support JE surveillance projects across the endemic countries to provide evidence for JE introduction decision making.

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### Timeline

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<td>Re-evaluation of award scenario based on demand conditions</td>
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<td>2022-Q2</td>
<td>Issue the next JE tender</td>
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Thank You