VACCINE MARKET UPDATE

Measles Vaccine
Measles Rubella Vaccine
Measles Mumps Rubella Vaccine

UNICEF Vaccine Industry Consultation

September 2019
UNICEF Supply Division
UNICEF procures Measles Containing Vaccines for 3 programmatic uses

- Routine immunization programmes (MV, MR, MMR)
- Preventive immunization campaigns (MV, MR)
- Outbreak response (MV, MR)

Forecast accuracy is improving

Demand volatility is driven by campaigns (MV & MR)
  - follow up campaigns (9-59 month target population)
  - catch up campaigns (9 months – 15 years target population)
Measles Containing Vaccines Market Update

Two overall demand drivers:
Countries switching to MR vaccine, including campaign
Countries introducing 2nd dose
Global increase in Measles cases

“Measles outbreaks continue to spread rapidly around the world, according to the latest preliminary reports provided to the World Health Organization (WHO), with millions of people globally at risk of the disease.

In the first six months of 2019, reported measles cases are the highest they have been in any year since 2006, with outbreaks straining health care systems, and leading to serious illness, disability, and deaths in many parts of the world. There have been almost three times as many cases reported to date in 2019 as there were at this same time last year.”


During 2017 through 2019 to date, flexible supply arrangements has enabled rapid response to 175 Measles Outbreaks and Humanitarian Situations.
Projecting when a country will conduct a follow-up campaign or introduction campaign is challenging.

Countries are recommended to conduct a follow-up campaign when the number of un-vaccinated equals an entire birth cohort.

But a multitude of aspects influence when a country would actually conduct a nationwide immunization campaign: funding, conflicting health priorities and cold chain capacity etc.

UNICEF has increased efforts in intelligence gathering to enhance the ability to project timing of campaigns.
### Measles Vaccine Market Update

**Vaccine availability sufficient to meet demand**

**Two-supplier market**

<table>
<thead>
<tr>
<th>Measles vaccine</th>
<th>Historic Procurement</th>
<th>Forecasted Demand</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2017</td>
<td>2018</td>
</tr>
<tr>
<td>Routine</td>
<td>66,314,000</td>
<td>80,449,000</td>
</tr>
<tr>
<td>Supplementary Activities</td>
<td>31,324,000</td>
<td>59,666,800</td>
</tr>
<tr>
<td>Humanitarian/Outbreak</td>
<td>19,513,000</td>
<td>17,488,000</td>
</tr>
<tr>
<td><strong>Total Demand</strong></td>
<td>117,151,000</td>
<td>157,603,800</td>
</tr>
</tbody>
</table>

**MV 2nd Dose Introduction - Projected Timing**

- 2020 Chad, Somalia

![Measles vaccine Forecast Accuracy Actual to Forecast (%)](image_url)
# MR Vaccine Market Update

<table>
<thead>
<tr>
<th>MR vaccine</th>
<th>Historic Procurement</th>
<th>2019</th>
<th>Forecasted Demand</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2017</td>
<td>2018</td>
<td>2019</td>
</tr>
<tr>
<td>Routine</td>
<td>50,382,700</td>
<td>71,873,200</td>
<td>58,000,000</td>
</tr>
<tr>
<td>Supplementary Activities</td>
<td>95,058,100</td>
<td>115,837,400</td>
<td>99,880,000</td>
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<tr>
<td>Humanitarian/Outbreak</td>
<td>7,351,100</td>
<td>11,254,200</td>
<td>13,400,000</td>
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<tr>
<td>Total Demand</td>
<td>152,791,900</td>
<td>198,964,800</td>
<td>171,280,000</td>
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</tbody>
</table>

### MR introductions - Projected Timing

- **2020**: Comoros
- **2021/22**: Pakistan
- **2022**: DR Congo, Mali, Madagascar, Liberia, Guinea-Bissau, Ethiopia

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**Vaccine availability sufficient to meet demand**

**One-supplier market**

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![Measles Rubella Forecast Accuracy Actual to Forecast (%)](image_url)
MMR Vaccine Market Update

Vaccine availability sufficient to meet demand
Three-supplier market

Demand is from Middle Income Countries, some of which have specific Mumps-strain requirements
Funding availability is challenged to enable access to required vaccines in view of increasing measles cases.

<table>
<thead>
<tr>
<th>Vaccine</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>Forecasted Demand</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2020</td>
</tr>
<tr>
<td>MMR-1</td>
<td>907,750</td>
<td>817,170</td>
<td>628,000</td>
<td>1,367,550</td>
<td>1,320,000</td>
<td>1,600,000</td>
</tr>
<tr>
<td>MMR-2</td>
<td>718,400</td>
<td>3,066,600</td>
<td>731,200</td>
<td>2,713,200</td>
<td>1,851,000</td>
<td>2,200,000</td>
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<tr>
<td>MMR-5</td>
<td>4,161,250</td>
<td>7,784,000</td>
<td>6,484,900</td>
<td>6,319,200</td>
<td>1,410,000</td>
<td>6,500,000</td>
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<tr>
<td>MMR-10</td>
<td>8,191,100</td>
<td>8,820,700</td>
<td>6,087,000</td>
<td>6,881,900</td>
<td>3,847,000</td>
<td>2,500,000</td>
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<tr>
<td>Total</td>
<td>13,978,500</td>
<td>20,488,470</td>
<td>13,931,100</td>
<td>17,281,850</td>
<td>8,428,000</td>
<td>12,800,000</td>
</tr>
</tbody>
</table>
Measles Containing Vaccines Market Update

Immediate Next Steps

Quantify unawarded quantity for 2020 (MR ~ 40 mds)
Finalize incremental awards for 2020

Next Steps

Determine tender duration through supplier consultations
Establish Tender Forecast
Tender issuance Q1 2020 for supply starting 2021
Continue to enable Outbreak Response
Thank You