Agenda

• What is the “developing country” vaccine market?
• Globally financed developing country vaccine market –
  • Demand
  • Supply
  • Financing

• Opportunities and challenges for the future
Changing Demand Landscape - 2006

Source: UNICEF public data
Changing Demand Landscape - 2008

Source: UNICEF public data
Changing Demand Landscape - 2009

Source: UNICEF public data
Changing Demand Landscape - 2010

Source: UNICEF public data
Changing Demand Landscape - 2011

Source: UNICEF public data
Changing Demand Landscape - 2013

Source: UNICEF public data

Source: UNICEF public data
New Product Combinations – Measles Family 2014-2030

Source: PATH Global Vaccines Market Model. Provided for illustrative purposes only
New Products in the Pipeline

Source: WHO public data; PATH and partners’ analysis, July 2015
Examples of Manufacturers Leading the Way

- Chengdu Institute of Biological Products (CDIBP)
  *Japanese encephalitis*

- Serum Institute of India Ltd.
  *Meningitis A*
New Markets (Gavi Graduation 2015-30)

Source: PATH Global Vaccines Market Model. Provided for illustrative purposes only.
New Markets (Gavi Graduation 2015-30)

Source: PATH Global Vaccines Market Model. Provided for illustrative purposes only.
New Markets (Gavi Graduation 2015-30)

Source: PATH Global Vaccines Market Model. Provided for illustrative purposes only.
New Markets (Gavi Graduation 2015-30)

Source: PATH Global Vaccines Market Model. Provided for illustrative purposes only.
DCVM diversity

Product Portfolio/Production Scale:
- Largest
- Niche

Market Driver:
- State-owned
- Privately Held
DCVM diversity

- Parastatal Global Actors
- Emerging MNCs
- Local Providers
- New Entrants

- State-owned
- Privately Held
DCVM diversity

Product Portfolio/Production Scale

Market Driver

Not exhaustive

Country key:
- Brazil
- China
- India
- Other
Opportunities and Challenges for the Future

Opportunities

- Creative partnership
- Lower Cost
- Market Knowledge
- Advantage for Regional Products?

Challenges

- Shift to combination vaccine
- Access to high margin markets
- GAVI Graduation
- Regulatory Approval/PQ
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