DCVMN – General Meeting
Impact of C-19 on RI and mitigation strategies

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20 October 2021
Outline

• Global vaccine markets
• C-19 impact on supply and demand for other antigens
• C-19 impact on Routine Immunization
• Mitigation strategies
Countries worldwide, through WHO processes, are calling for enhancing access to vaccines

- **Total of 50 WHA Global Resolutions** on access to medicines and vaccines + 45 regional Resolutions

- **WHA72** adopted a Resolution on improving the transparency of markets for medicines, vaccines, and other health products

- **WHA73** endorsed the **Immunization Agenda 2030 (IA2030)** with Strategic Priority 6 on supply and adopted a resolution recognizing extensive immunization against COVID-19 as a global public good for health.
How does WHO influence access to vaccine supply?

Establish global immunization agenda & strategies to build and harness commitment to action

Inform demand: develop policies for optimal use of vaccines & advance evidence-based introduction of vaccines

Promote research and innovation to increase impact of vaccines, technologies, and practices

Provide regulatory support to accelerate authorization

Enhance market transparency to ensure all options towards equitable access are evident to both buyers and sellers

72nd WHA - May 2019 – adopted a Roadmap on access to medicines and vaccines 2019-2023
Key resource: market intelligence and analysis for increased access
Market Information for Access (MI4A)

- **Increased engagement of countries** sharing information on products purchased, however recent difficulties due to Covid-19. Vaccine Purchase Data is updated annually and publicly available: https://www.who.int/teams/immunization-vaccines-and-biologicals/vaccine-access/mi4a/mi4a-vaccine-purchase-data

- Considerable progress in engagement of manufacturers with **37 main producers** providing yearly update – representing of **~90% of global supply for key vaccine markets.** Covid-19 now provides an opportunity to go even further.

- Industry engagement has increased over time but only **30% of DCVMN members** participate in the annual data survey.

Partial reporting: countries reporting vaccines procured but not prices
Member States report vaccine purchase data through the WHO/UNICEF JRF
2020 data as of 31st September – further updates expected
Policy influences demand for vaccines and intelligence is used to inform strategic understanding of market dynamics, e.g. Malaria

October 2021, following SAGE recommendation on Malaria Vaccine RTS’S, WHO recommended that “the vaccine be used for the prevention of P. falciparum malaria in children living in regions with moderate to high transmission as defined by WHO.”

WHO Global Market Study feeds into programmatic discussions and define required action by WHO in collaboration with partners to ensure timely access including:

- Support countries on decision-making, planning and introduction.
- Provide visibility into supply outlook and develop an approach to prioritizing distribution of limited supply in initial years.
- Work with manufacturers, governments, procurement and financing schemes to incentivize an increase in supply capacity.

https://www.who.int/publications/m/item/who-malaria-vaccine-global-market-study-september-2021
This work happens in full collaboration with partners

WHO’s ongoing assessment of the global market for COVID-19 vaccines to understand Covid-19 vaccine market dynamics and related risks
Outline

- Global vaccine markets
- **C-19 impact on supply and demand for other antigens**
- C-19 impact on RI
- Mitigation strategies
Understanding risks for access to key vaccines due to COVID-19 impact

- Potential supply issues due to both pandemic & COVID-19 vaccine production need to be investigated (e.g. linked to manufacturing processes, constraints in the release and distribution of the vaccines).

- Evolution of programmatic dose requirements/demand due to both pandemic & COVID-19 vaccine introduction requires study (e.g. coverage, postponement of NVI, postponement of campaigns, outbreak response, etc).

**Objective**: highlight risks for access to key vaccines and identify potential actions.

- **Indicative: BCG vaccine**
- **D&T containing vaccines**: Primary series
- **Pneumococcal vaccines**
- **Measles containing vaccines**: Primary series
- **HPV vaccine**: Booster doses

Influenza, Polio, Rotavirus input included in the supply analysis based on specific input from WHO & UNICEF.
**COVID-19 increases risks of supply-demand unbalances for MCV and PCV**

### Measles

**MARKET HEALTH PRE COVID-19***

**COVID-19 IMPACT**

<table>
<thead>
<tr>
<th>Demand</th>
<th>Available Supply for Commercialization</th>
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<tbody>
<tr>
<td>Moderate risks of change</td>
<td>Moderate to high risks of decrease</td>
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Supply sufficient to meet baseline global demand, but risks linked to highly variable doses requirements (coverage gaps triggering large SIAs) and highly concentrated market

### PCV

**MARKET HEALTH PRE COVID-19***

**COVID-19 IMPACT**

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Growing supply to meet global demand through rich pipeline, but market fragmentation carry risks linked to mismatch of country product preferences with supply

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*Per WHO MI4A market studies 2020*
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5 areas related to demand that were potentially impacted due to COVID-19 pandemic

Experts indicated there were several factors that could impact global mid- to long-term demand forecasting:

• Stopping of immunization services
• Changes in health seeking behavior
• Disruption of staff and workforce
• Inefficiencies in cold chain and logistics systems
• Financing and economic downturn
Level of RI disruption varies by region and continues into 2021

Weighted relative difference in #DTP3 vaccinated in 2021 and 2020, compared to 2019

Countries that have consistently reported data through June 2021
(%) is the proportion of surviving infant population in the region represented by the countries reporting through last month

Source: Monthly admin estimates, September 2021
46 Countries with VPD campaigns postponed due to COVID-19, by antigen

Map production: Immunization, Vaccines and Biologicals (IVB), World Health Organization (WHO)

Data source: WHO/IVB Repository, 1st September 2021

The boundaries and names shown and the designations used on this map do not imply the expression of any opinion whatsoever on the part of the World Health Organization concerning the legal status of any country, territory, city or area nor of its authorities, or concerning the delimitation of its frontiers or boundaries. Dotted and dashed lines on maps represent approximate border lines for which there may not yet be full agreement. World Health Organization, WHO, 2021. All rights reserved.
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Mitigating action for C-19 impact on market for other antigens

Cross-cutting actions:

**Manufacturer engagement**
Continue engagement with manufacturers:
- Bilateral discussions
- Continue data collection
- Debrief on 2021 findings and conduct information sessions

**Information for access**
- With UNICEF, monitor shipment trends and country implementation plans
- Monitor coverage estimates and introduction dates, particularly for new vaccines (HPV and PCV) + measles outbreaks
- Monitor timeliness of DCGI lot release and new vaccine registrations

**Demand shaping**
- Implement flexibilities to meet short-term country demand (e.g., product presentations, country preferences, shelf life)
- WHO keeps working to expand reliance on PQ and SRAs marketing authorisation across all vaccines
NIGERIA: LEVERAGING THE CVDPV OUTBREAK RESPONSE TO SUPPORT COVID-19 VACCINE ROLLOUT

Sensitizing communities to build confidence in the COVID-19 vaccine, leading to an increase in vaccination coverage

Using polio surveillance tools and applications (e.g. AVADAR) for case detection, reporting, monitoring COVID-19 vaccine uptake

Technical support to cold chain management – resulting in significant reductions in wastage

Supporting national deployment plans through capacity building (e.g. using smartphones for e-registration of vaccine recipients, AEFI training)
Assessment of mid-to long-term risks of COVID19 impact on demand changes

**D&T infant & booster**  
Linked to potential drops in coverage if they worsen or are sustained, may result in decrease in demand

**PCV**  
Potential decrease due to drops in coverage; however potential increase due to high demand (respiratory disease similar to COVID-19)

**BCG**  
Very low risk as no main issues foreseen, potential increase in wastage rates but does not significantly affect global demand

**HPV**  
Moderate risks given number of planned introductions and coverage drops are significant; uncertainty on MACs

**MCV**  
Moderate to high risk of increase in demand unpredictability due to reduced coverage and delayed planned SIAs

Different from supply assessment, some of the anticipated changes may increase demand while others may decrease demand. Further detailed assessment will need to be conducted to determine potential impact on global demand.