

# Vaccine Manufacturing and Procurement in Africa Study

---

## Landscape Analysis Report

**AVMI AGM Meeting**

Newlands, Southern Sun Hotel, Cape Town, 30<sup>th</sup> November 2016

# Vision

---

An Africa with sustainable vaccine manufacturing capacity to meet the needs of its people

# Mission

---

To promote the establishment of sustainable human vaccine manufacturing capacity in Africa

# VMPPA Study commissioned in 2015

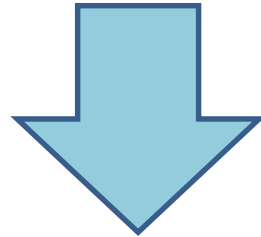


Date	Milestone
January 2005	AU Assembly mandated the AUC to develop the PMPA with the Framework of NEPAD
2007	Initiation of PMPA
2012	PMPA Business Plan
May 2015	WHA Resolution: Importance of developing vaccine manufacturing capacity in Africa underlined
July 2015	VMPPA Study Initiated
November 2015	Draft VMPPA Report
December 2015	Stakeholder Consultation
December 2016	Report Finalization
Q4 2016 (Proposed)	VMPPA Study Stage 2: Case studies

# The overall goal of the VMPA Study

---

**Goal of the VMPA study**



**Provide an analytical assessment of vaccine manufacturing capacity and procurement mechanisms in Africa and suggest options for further consideration**

# Vaccine Production In Africa

## In Favour

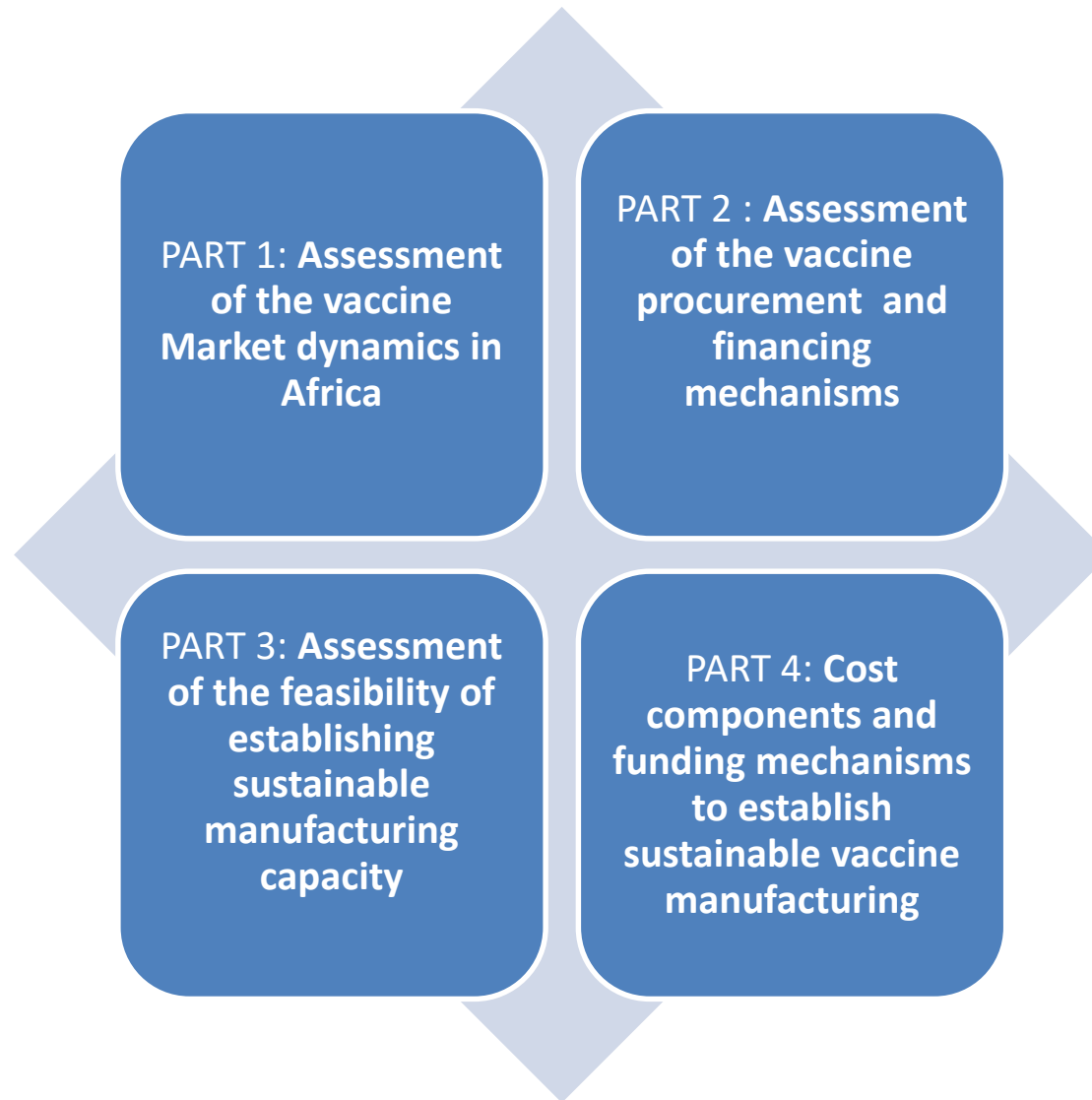
- **Security of vaccine supply**
- **Addressing of the Africa specific disease burden**
- **Dealing efficiently with pandemic diseases,**
- **Responding the unmet needs**
- **Growing population and market**
- **Socioeconomic, industry and life science development**

## Against

- **Failure of the past and recent experiences in manufacturing**
- **Complexity and high cost of development and manufacturing**
- **Fragmented and dependent vaccine market in Africa**
- **Lack of human and technical capacity**
- **Absence of long term vision and political will to invest in public health goods and technologies.**

# VMPA Study: Landscape Analysis

---



# VMPA Study: Key findings

---

## Vaccine Market

- African demand is booming its number of doses, vaccine types, increased populations, immunization coverage and vaccine expenditure
- High entry barriers, increasing cost and high risk of failure – still limits the amount of manufacturers interested

## Vaccine Procurement

- UNICEF SD Procurement services is the dominant procurement mechanism in Africa
- 45 out of 54 countries use UNICEF SD
- If status quo remains, African manufacturers should aim to become WHO-prequalified supplier to UNICEF

# VMPA Study: Key findings

---

## Vaccine Manufacturing

- Limited to non existing in Africa
- 8 companies with existing or potential manufacturing capacity have been identified
- Heterogeneous levels of capacities and capabilities, very few with any API capability
- NRA functionality is limited with core emphasis pharmaceuticals
- 171 clinical trials were conducted in Africa between 2002 and 2015

## Vaccine Funding

- Building manufacturing facility can cost between USD 60 – 130 million, with CAPEX at 60%
- Financing sources: government, grants, fee income, loans or private.
- Several innovative financing are under discussion

# VMPA Study: Conclusion

---

**It can be concluded that:**

- **There is limited space for multiple major players in the vaccine production field in Africa**
- **A number of regional players could be established with the right level of political and technical support**
- **A clear and funded regional policy and plan is required to develop the necessary ecosystem.**
- **The potential to create a viable, competitive and sustainable vaccine manufacturing industry in Africa DOES exist!**

# VMPA Study: Part 1 closure

---



## Close-out of report

- Ready for publication on the AVMI, UNIDO and WHO websites by end December 2016.