July 2022

MANUFACTURING AFRICA

Manufacturing Africa aims to reduce poverty in Africa by attracting £1.2 billion of foreign direct investment into manufacturing and creating 90,000 jobs over 7 years (2019-2026). The programme is funded by the UK government through the Foreign, Commonwealth & Development Office (FCDO)

Helping to grow the African vaccine manufacturing sector by aiding PAVM achieve its 60% local vaccine manufacturing goal by 2040

At the Summit for ***Expanding Africa's Vaccine Manufacturing***, held by Africa CDC in April 2021, Dr. Nkengasong announced the launch of the Partnership for Vaccine Manufacturing (PAVM), organised along 7 strategic pillars aligned to each of the critical enablers for African Vaccine Manufacturing. Each pillar is led by a leading African institution and supported by an identified group of strategic experts.

In August to October 2021, Phase 1 of Manufacturing Africa's support to PAVM focused on rapid approach validation for demand forecasting for vaccines within Africa. From February to April 2022, Phase 2 & 3 assisted PAVM to perform analysis for critical market intelligence questions, including support in dissemination of findings.

THE CHALLENGE

Market intelligence (a transparent perspective on supply and demand dynamics) has been identified by all stakeholder groups as a critical unlock to expanded vaccine manufacturing in Africa, so that at the continental, regional, country, and manufacturer levels, decision-makers can develop strategies that will strengthen health security on the continent in a way that is both impactful and – critically – economically viable and sustainable over the long term.

Upon the validation of the demand forecasting approach in Phase I, Manufacturing Africa provided support in the performance of the analyses and dissemination of findings.

Images shown are for illustration purposes only

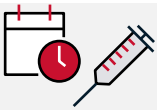
OUR SUPPORT AND IMPACT

Phase 2 & 3 of our support to PAVM comprised 5 major activities

1. DEMAND ANALYSES

We forecasted scenarios of expected demand (both volume & value) to 2040 (for each African country and region and for each product (existing + pipeline), heavily leveraging the forecasts developed in the last phase (with updates based on new information or assumptions).

Results of our work included:



Routine vaccine forecasts
Demand forecasts for existing vaccines that are currently administered across most national EPI programmes. We leveraged Linskbridge 2030 volume and pricing forecasts and extrapolated to 2040 to estimate routine vaccine demand within Africa.

Novel vaccines forecasts
Demand forecasts for pipeline vaccines that are yet to be launched but are important for African health security. We forecasted novel vaccine demand by estimating vaccine licensure dates, country introductions, and prices based on historical price evolution trends

Outbreak vaccine forecasts
Demand forecasts for outbreak vaccines (e.g., Lassa fever, Ebola etc.) by estimating stockpile sizes, draw downs and prices

2. PROCUREMENT AND FINANCING MECHANISMS ANALYSIS

This included outlining of the emerging procurement landscape with multiple African countries transitioning from Gavi, the potential impact and emerging risks of this transition, and potential mitigation mechanisms (e.g., AVATT scope expansion).

This piece of work focused on:

Emerging procurement landscape

We outlined the current and emerging procurement landscape, with a focus on the breadth of African countries that are currently Gavi supported, and the expected shift in coming years.

Impact of shifting procurement landscape
We examined the increased financial obligation that African countries would likely have to bear upon transition from Gavi among other risks e.g., regulatory, decision-making, supply-chain etc.

Potential mitigation mechanisms We outlined the potential 'unlocks' that would be needed to enable local vaccine manufacturing in the context of the emerging procurement landscape e.g., AVATT

3. SUPPLY AND CONTINENTAL CAPACITY ANALYSIS

This entailed analysis of the global and local supply landscape and emerging capacity announcements within the continent. Results of our work included:

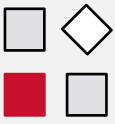
Global supply landscape for vaccines on continental strategy
We developed a data base of existing suppliers for vaccines on the continental strategy across the globe, including their PQ status and historical market share

Continental capacity analysis
We analysed announced manufacturing capacity within Africa along different parts of the value chain (i.e., DS vs F&F), the extent to which it has been planned/implemented, and how it could potentially be re-purposed

4. ANTIGEN ASSESSMENTS

Analysis of the opportunity space for local manufacturing of various antigens on the continental strategy along different parts of the manufacturing value chain (i.e., DS vs F&F), in the near, medium and longer-term. This entailed:

Assessment of antigens across critical factors
We assessed each of the antigens on the continental strategy across 9 critical assessment factors to determine their viability for local manufacturing across different parts of the value chain in the near, medium and longer-term



Categorisation of the local manufacturing opportunity space
We categorised the 4 opportunity spaces that exist across parts of the value chain, and allocated various antigens to them depending on their performance across the 9 critical assessment factors

5. SUPPORT IN DISSEMINATION OF FINDINGS

We supported PAVM in dissemination of findings which included preparation of materials and facilitation of the final round of workshops for the relevant stakeholder groups. This included assistance in the preparation of workshop content and format, as well as technical assistance during the workshop.

CONCLUSION

This phase of our work has been instrumental in bringing together all the relevant stakeholders (development partners, global health organisations, procurement agencies, DFIs & banks, manufacturers) to discuss the critical topic of market intelligence in support of the PAVM market design and demand intelligence pillar. Our findings will support stakeholders across all levels develop a sustainable demand mechanism, consequently moving Africa a step closer to local vaccine manufacturing.

This programme is funded by UK aid from the UK government; however, the views expressed do not necessarily express the UK government's official policies.

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