

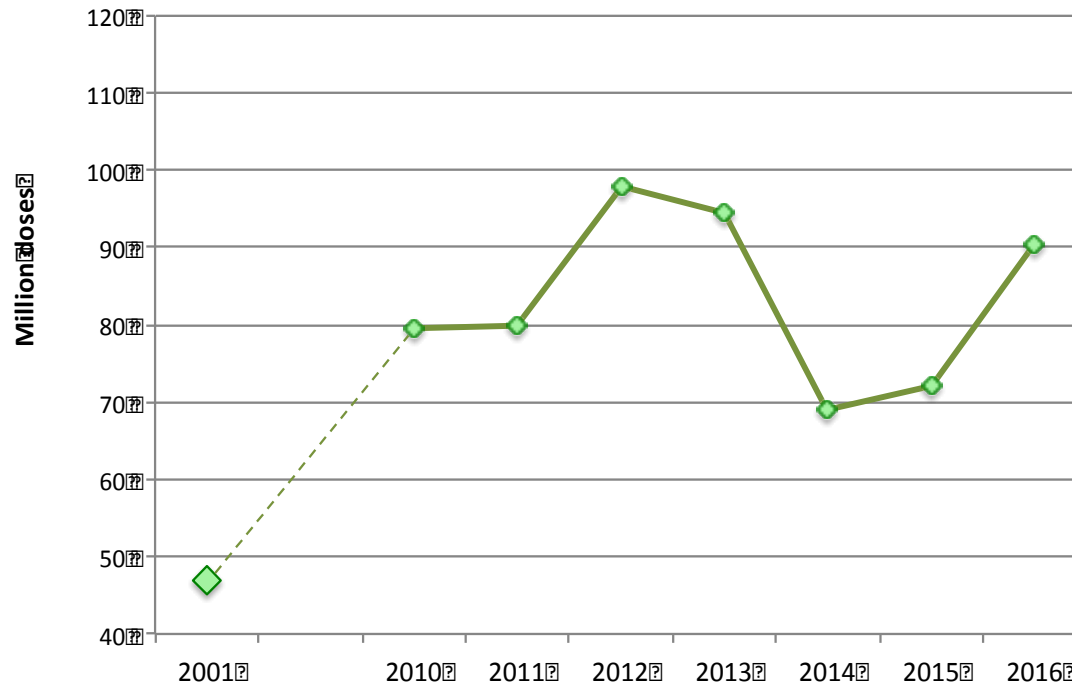
# Vaccine supply outlook, Market dynamics, and Preliminary EYE need forecasts

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# Market dynamics

Evolving supply 2001-2016



**Between 2012-2016: vaccine production problems**

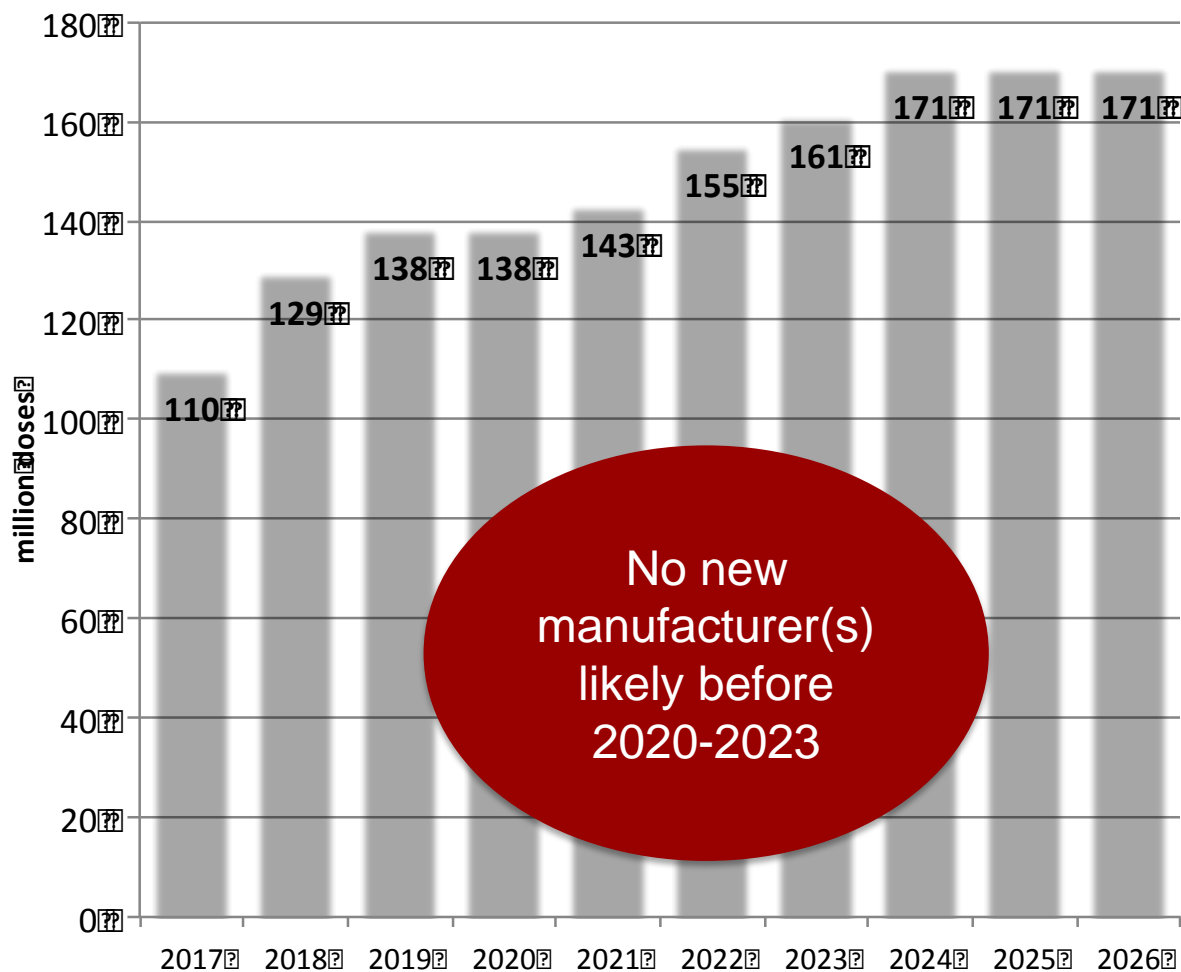
3 vaccine manufacturers stopped production for quality issues and/or to upgrade manufacturing facilities

# Market dynamics

## Manufacturers' initiatives and investments

- 4 facilities upgraded or fully refurbished,
- Processes upgraded,
- 1 new manufacturing line,
- Contract manufacturing explored (freeze drying/fill-finish),
- 3 new facilities funded, initiated, or built,
- Each manufacturer is targeting between +60% and + 150% capacity

# Estimated Global supply 2017-2026 (Risk adjusted)

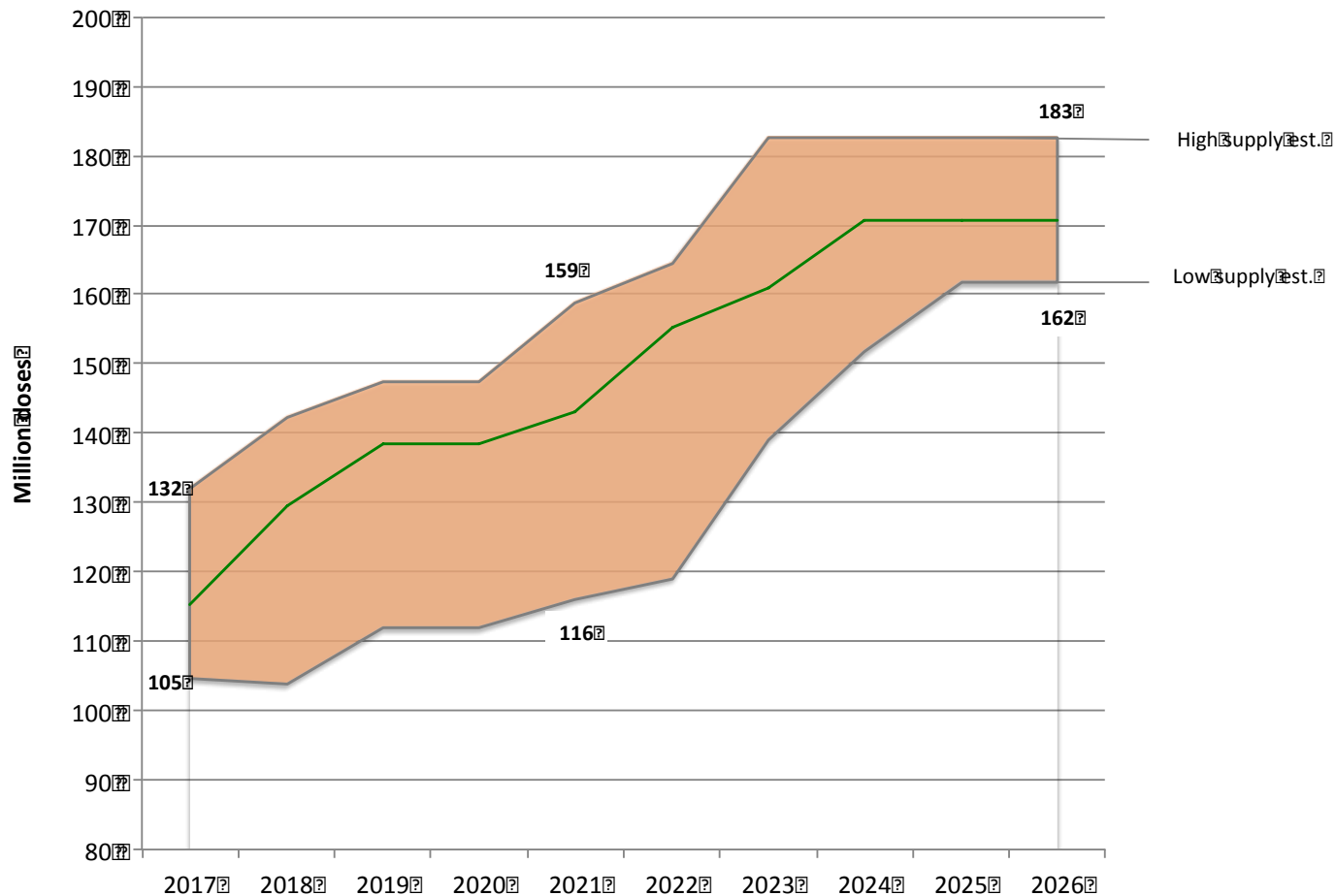


## Total volume 2017-2026

➤ Approx. 1,487 million doses

# Estimated Global supply 2017-2026

## High to Low estimates (Risk adjusted)



# Vaccinated needs for the EYE strategy

1. Mass preventive campaigns
2. Increased routine
3. Emergency stockpile

# YFV stockpile forecast

1. Realistic quantity that could be maintained in stock without increasing costs
2. Historical use of the stockpile
3. Monthly production capacity to replenish the stock
4. Average of population at risk in urban areas in endemic countries
5. Reactive vaccination capacity 10-15 days

# Revolving YFV Stockpile (1)

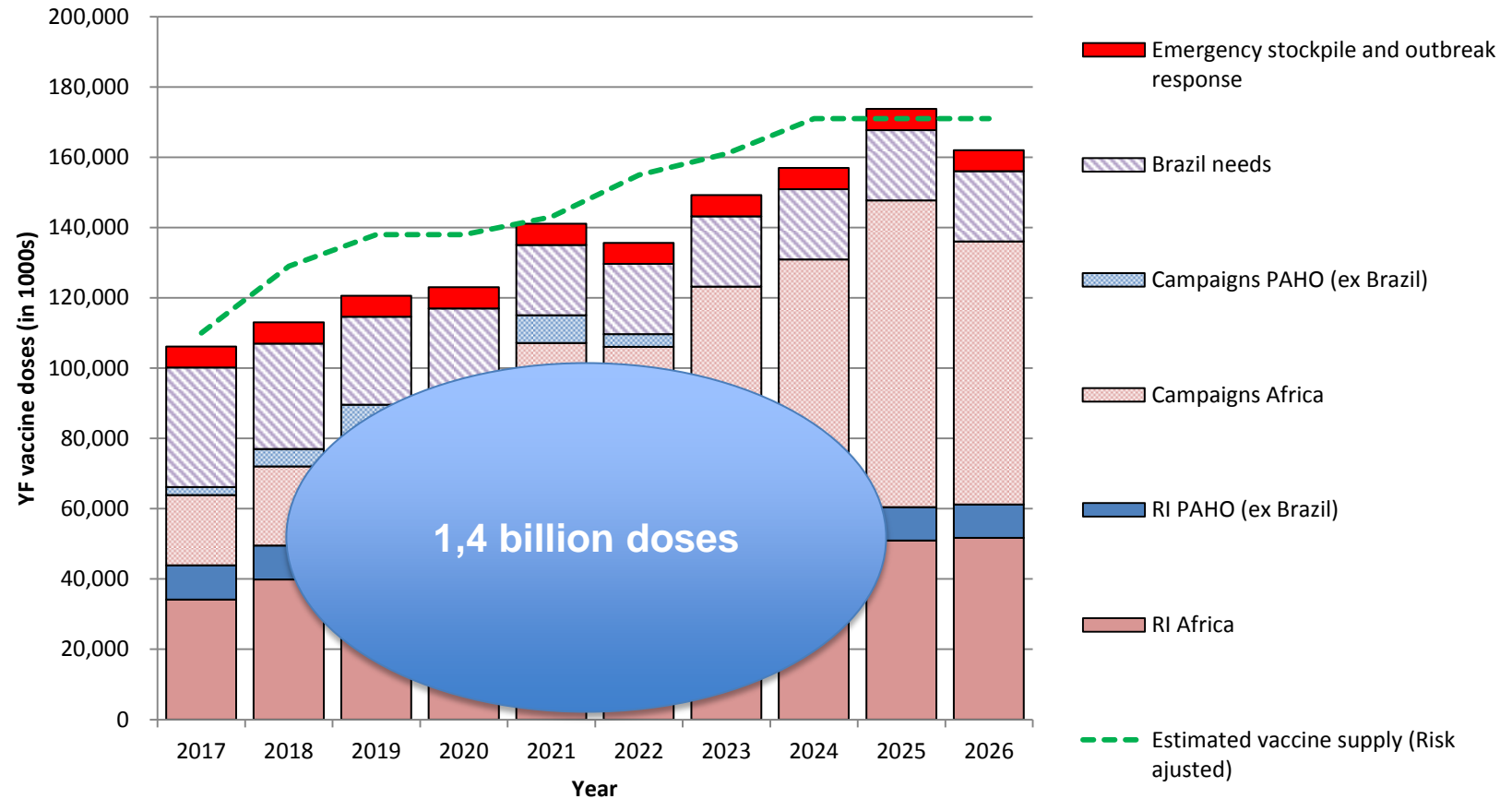
1. Stockpile should be maintained at **6 million doses** throughout the year
2. The stockpile will be immediately replenished after being used, thus permitting management of large urban or protracted outbreaks
3. New procurement/contractual mechanisms need to be developed to ensure a revolving stock



# Revolving YFV Stockpile (2)

4. There will be no wastage, the 6 million dose are included in the annual demand for preventive, rotation between preventive and reactive
5. New regulatory options to rapidly scale up supply:
  - I. Bulk stockpile, Contract Manufacturing Operations fill/finish
  - II. Formulation, reviewing potency, stability/shelf-life requirements for bulk and finished vaccine
6. Novel production technologies, based cell-culture or a DNA vaccines

# Preliminary need estimates



# Thank you