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Growing sustainable and resilient human vaccines development and manufacturing capabilities in Africa – challenges and opportunities

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Statement of the Problem: Africa currently produces only 1% of its vaccine needs, a situation that exposes African countries to a high risk of epidemics and pandemics, weakened national security, poor emergency preparedness and poor sustainability and supply assurance of vaccines. AVMI commissioned the Vaccine Manufacturing and Procurement in Africa (VMPA) study to assess the feasibility of establishing sustainable vaccine manufacturing capacity in Africa.

Methodology: This analytical assessment of vaccine manufacturing capacity and procurement mechanisms in Africa was designed to answer four key questions related to understanding the vaccine market dynamics in Africa, the vaccine procurement & financing mechanisms, the technical feasibility of establishing sustainable vaccine manufacturing capacity in Africa, and the cost drivers and funding mechanisms in establishing sustainable vaccine manufacturing in Africa. The methodology combined field observations, quantitative and qualitative approaches, desk review, questionnaires and interviews with manufacturers, resource persons and experts as well as regular consultation with the VMPA Study management team and an expert Strategic Advisory Group.

Findings: In 2013, Africa vaccine market was approximately 5.5% of the global vaccine market, with an ever-increasing

demand in terms of number of doses of vaccine and vaccine types. In 45 of the 54 African countries, UNICEF is the predominant procurer; the percentage of UNICEF vaccine sales in Africa compared to the total UNICEF vaccine sales globally is around 60%. Only eight companies in Africa have existing or potential vaccine manufacturing capacities, only one of which currently exports a WHO prequalified vaccine (Yellow Fever). There are huge obstacles for establishing sustainable vaccine manufacturing capacity in Africa, including industrial and commercial competition for routine vaccines, scientific, technical, managerial and financial challenges, compounded by the lack of an enabling ecosystem in most African countries.

Conclusion & Significance: Current vaccine supply in Africa is heavily influenced by funding sources and global community policies and incentives. While the potential for developing vaccine manufacturing capacity in Africa exists, current procurement and related practices could impede the utilization of any African manufactured vaccines and therefore require in-depth consideration for sustainability of local vaccine production. Active intervention to establish a conducive business environment is required for the development of a more comprehensive and sustainable vaccine manufacturing industry in Africa

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