

Developing Country Vaccine Markets

Presentation to 2015 DCVMN Meeting

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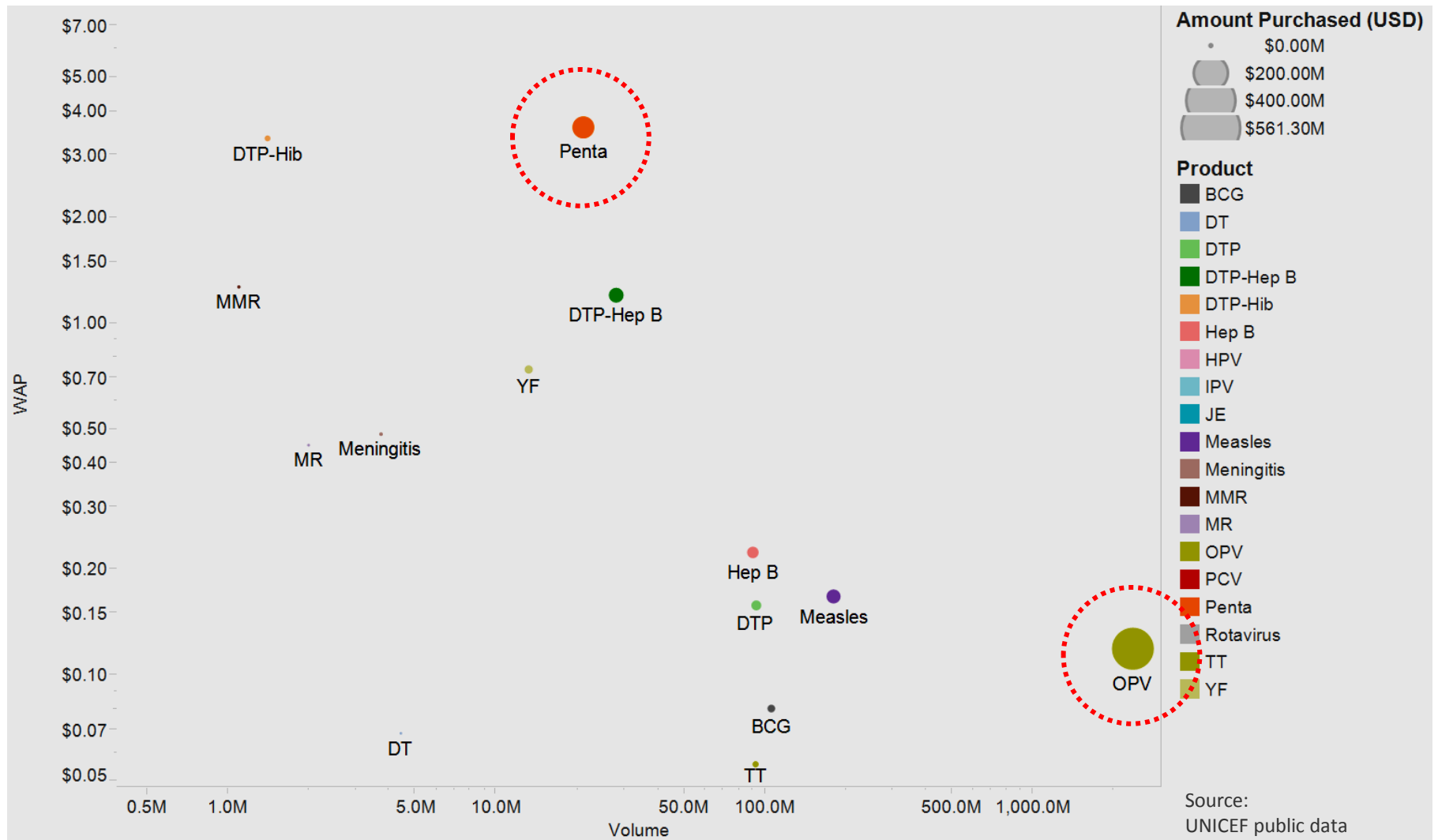
October 2015



Agenda

- What is the “developing country” vaccine market?
- Globally financed developing country vaccine market –
 - Demand
 - Supply
 - Financing
- Opportunities and challenges for the future

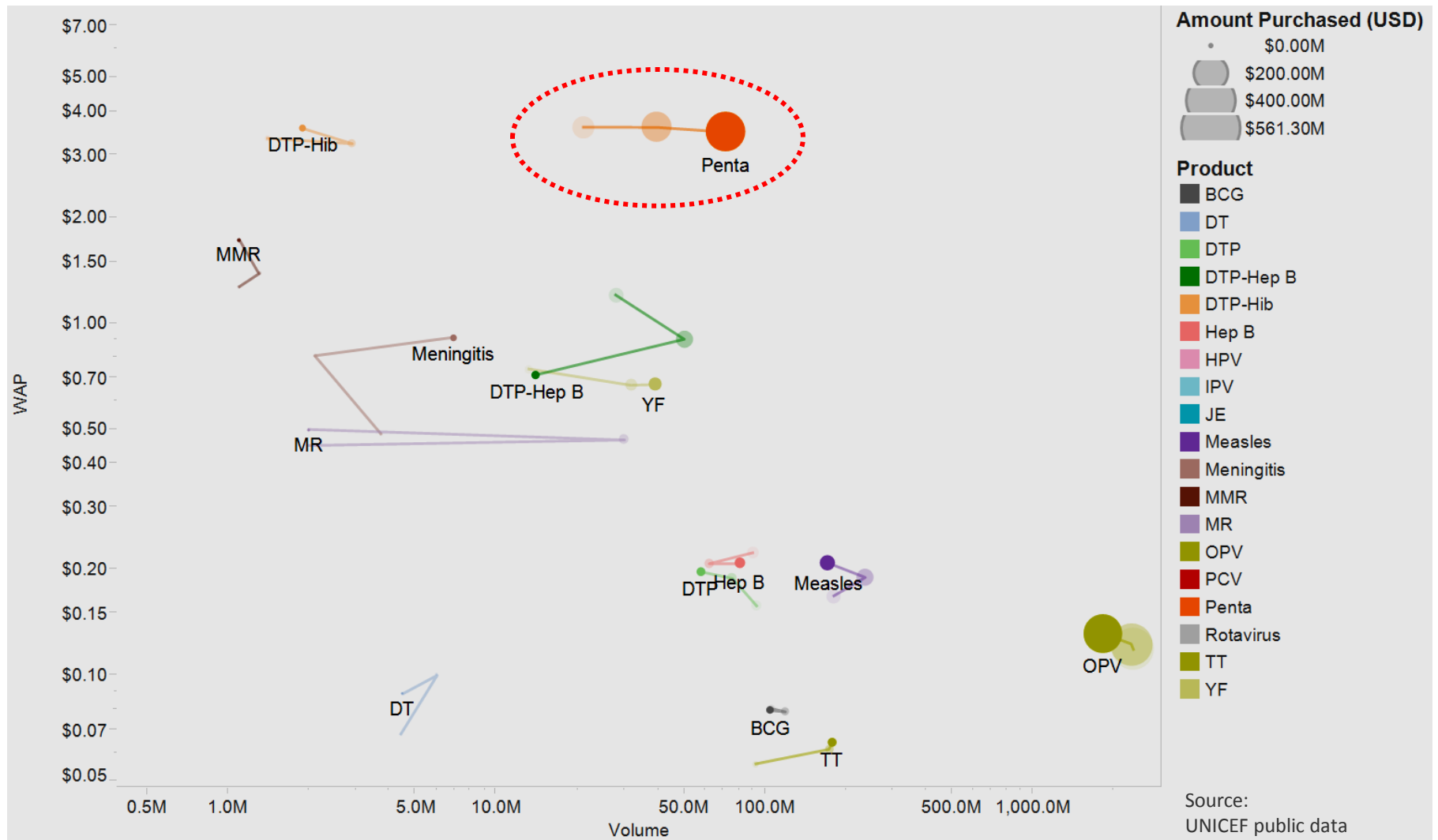
Changing Demand Landscape - 2006



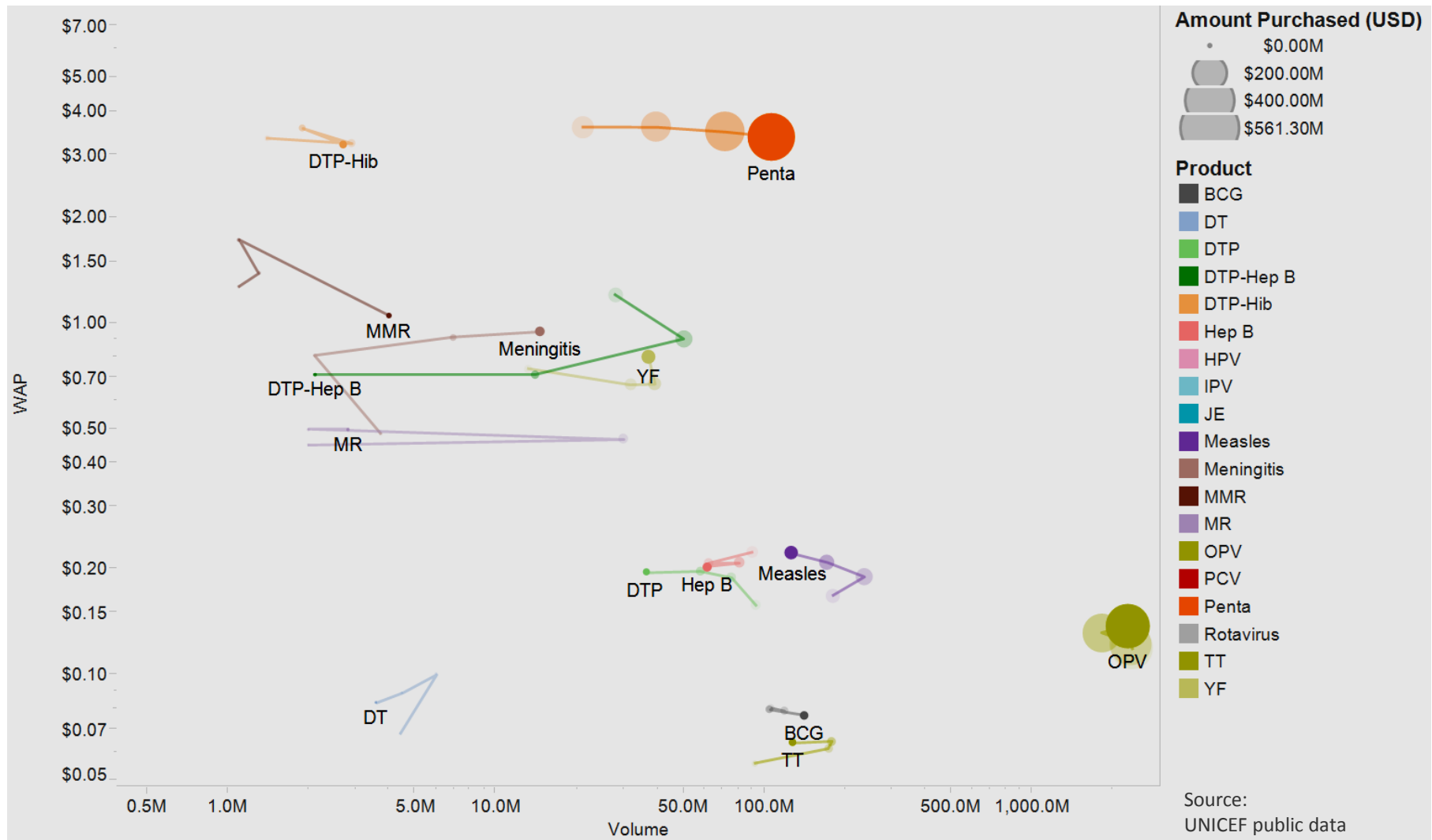
Changing Demand Landscape - 2007



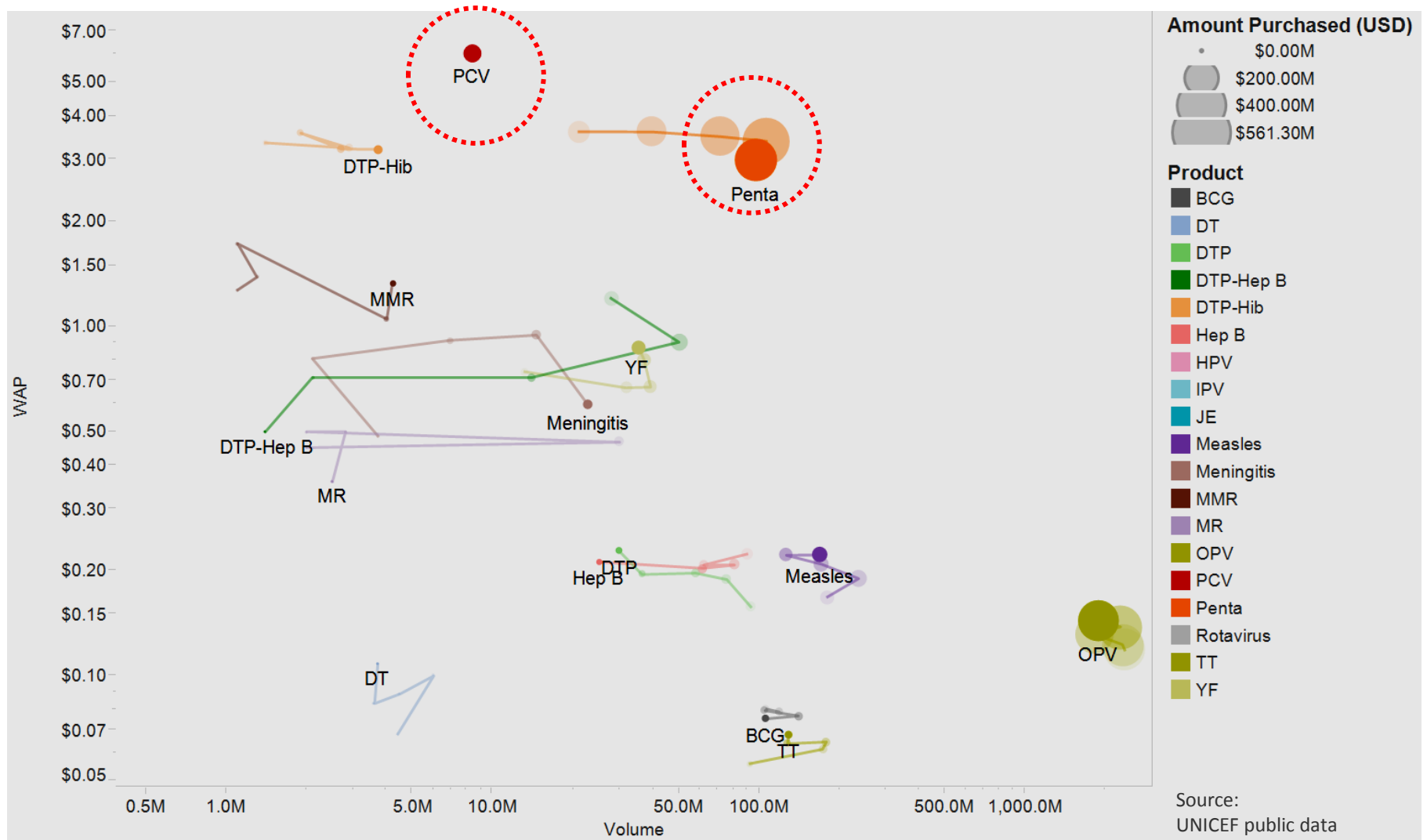
Changing Demand Landscape - 2008



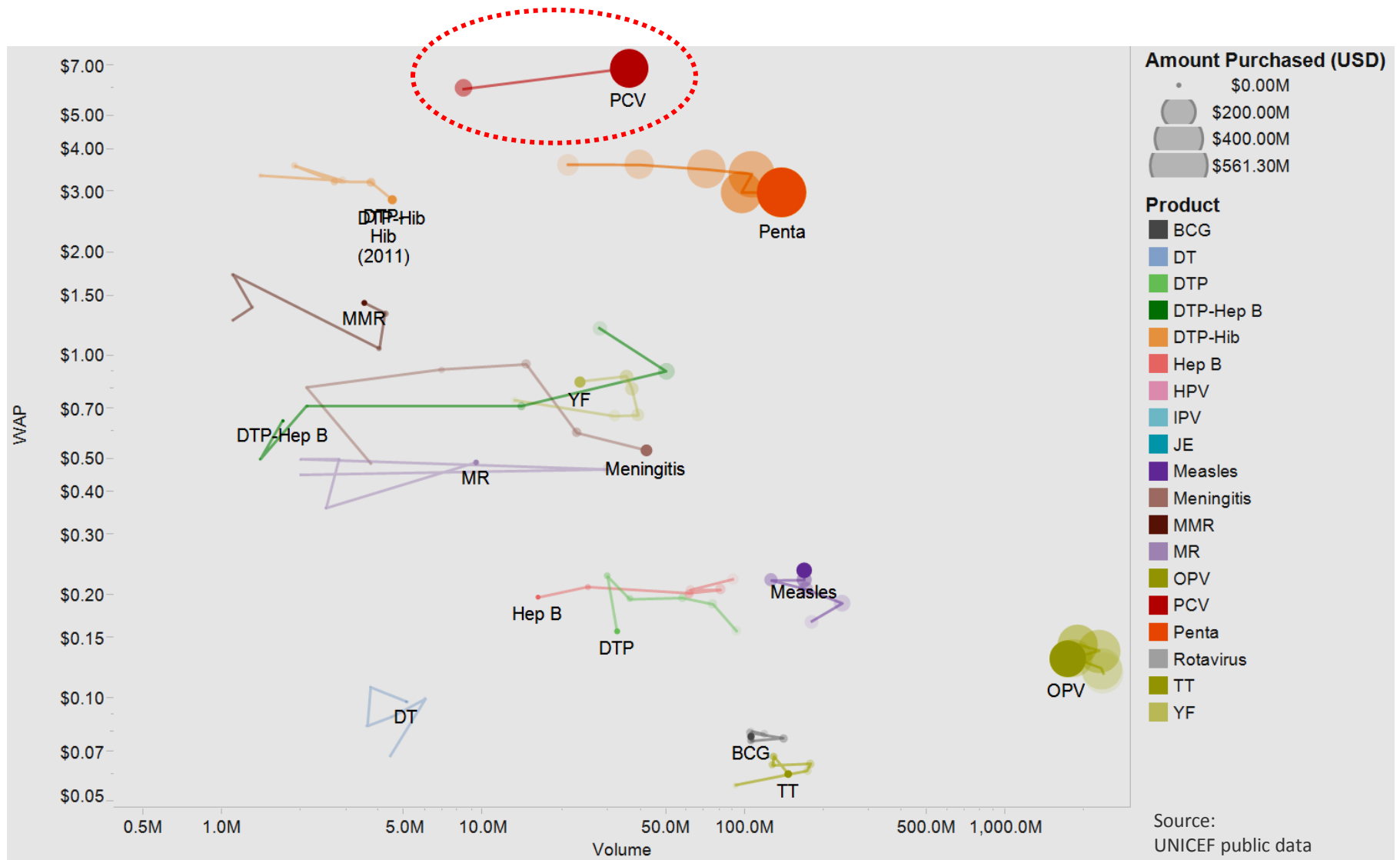
Changing Demand Landscape - 2009



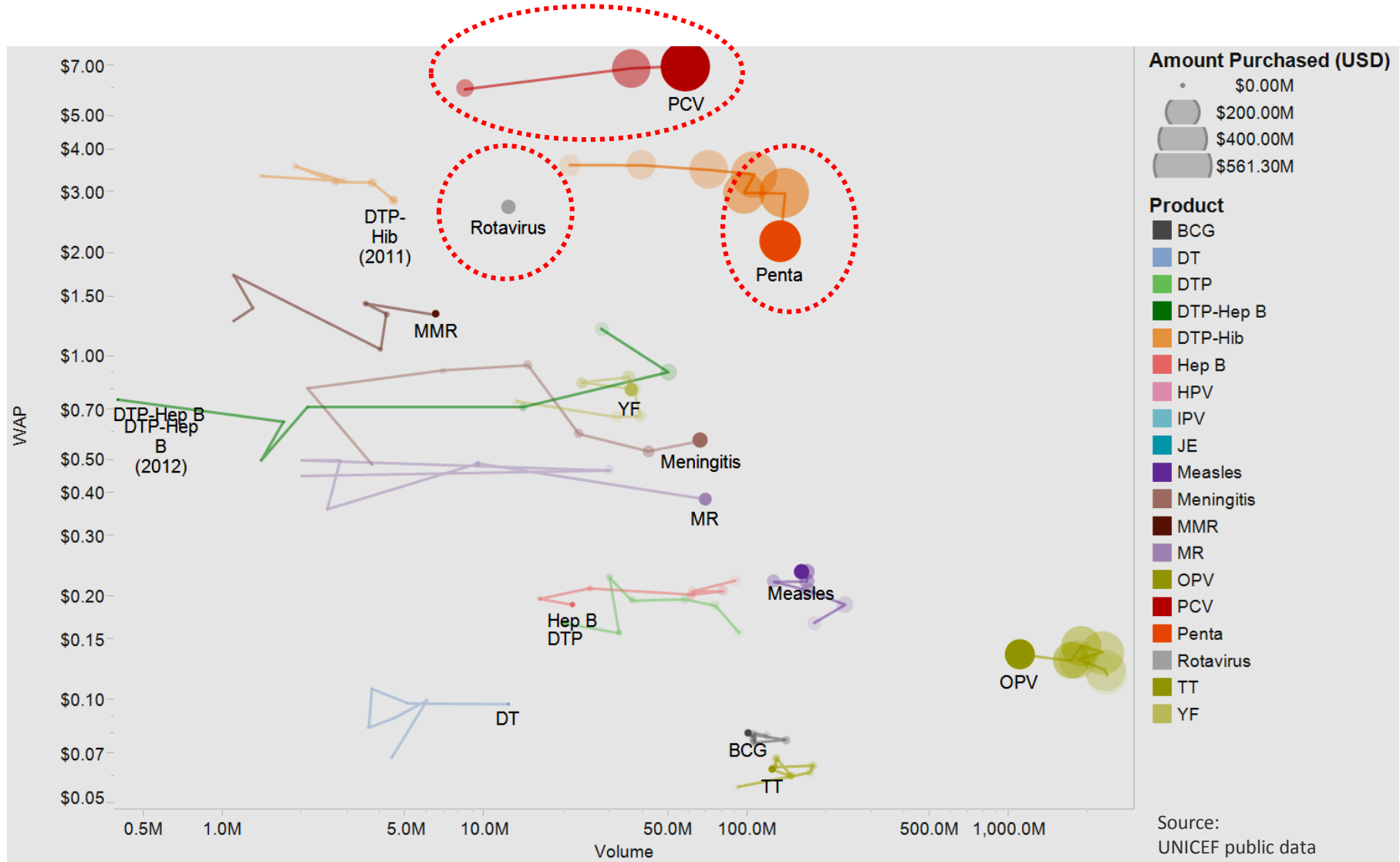
Changing Demand Landscape - 2010



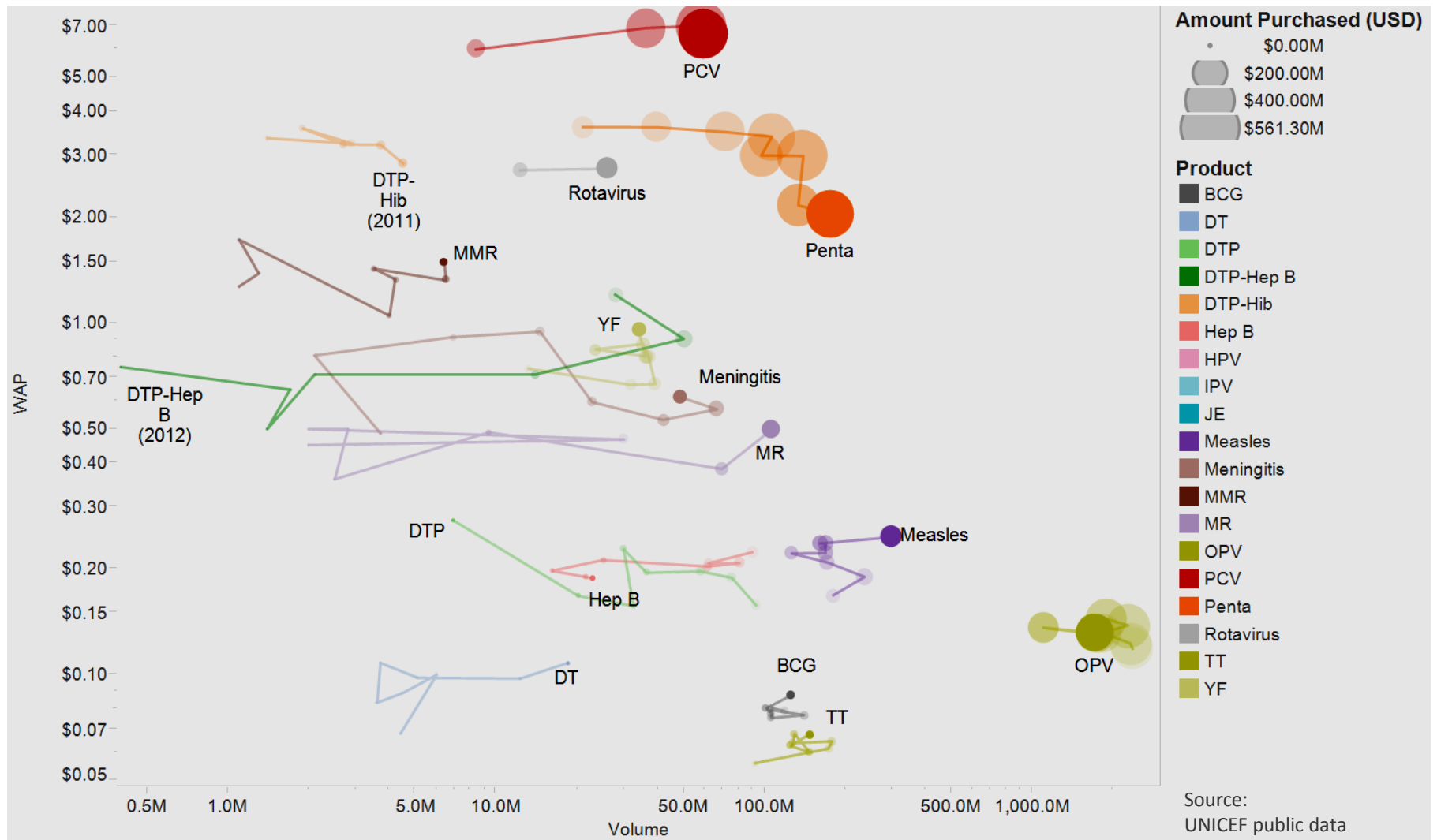
Changing Demand Landscape - 2011



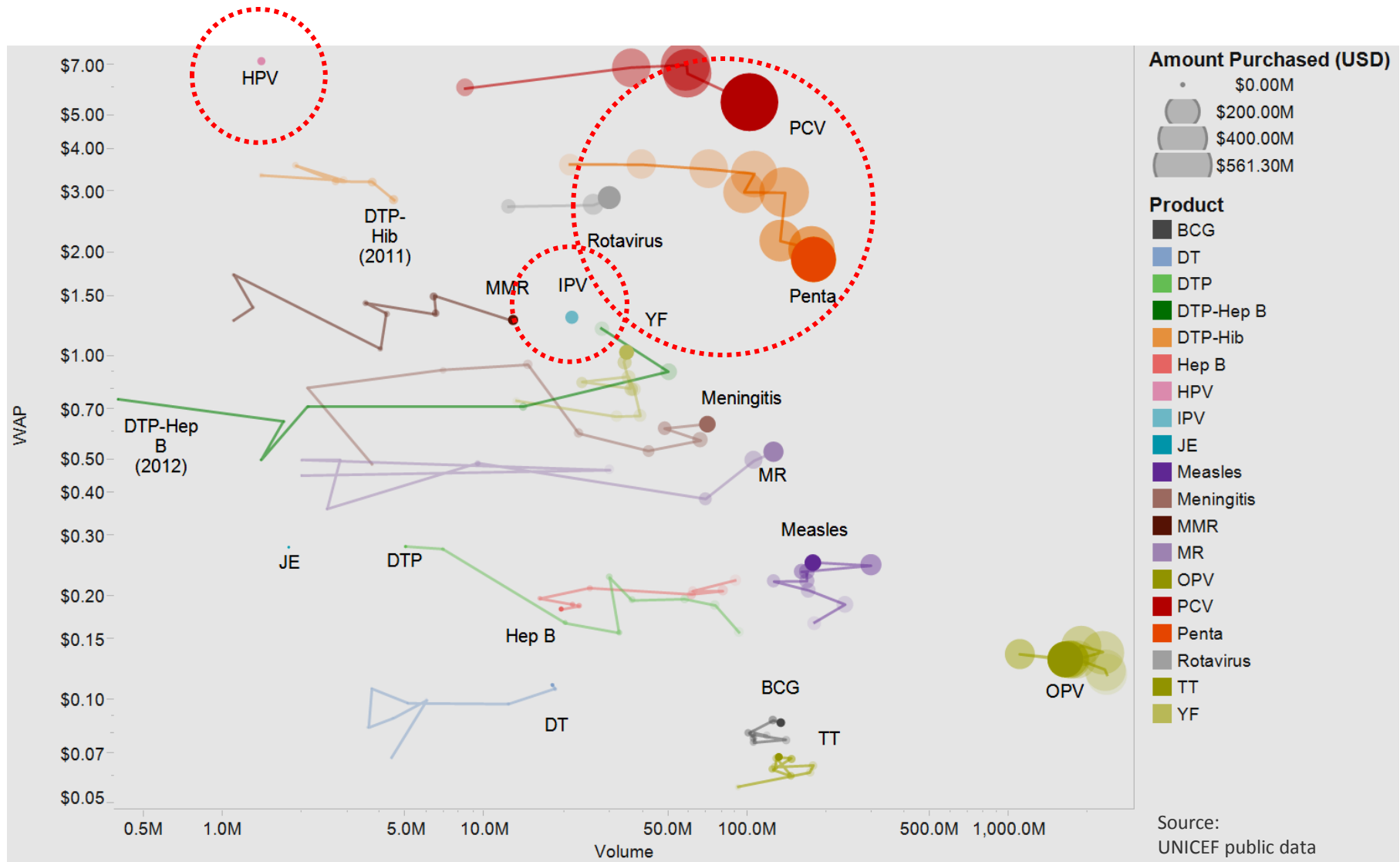
Changing Demand Landscape - 2012



Changing Demand Landscape - 2013

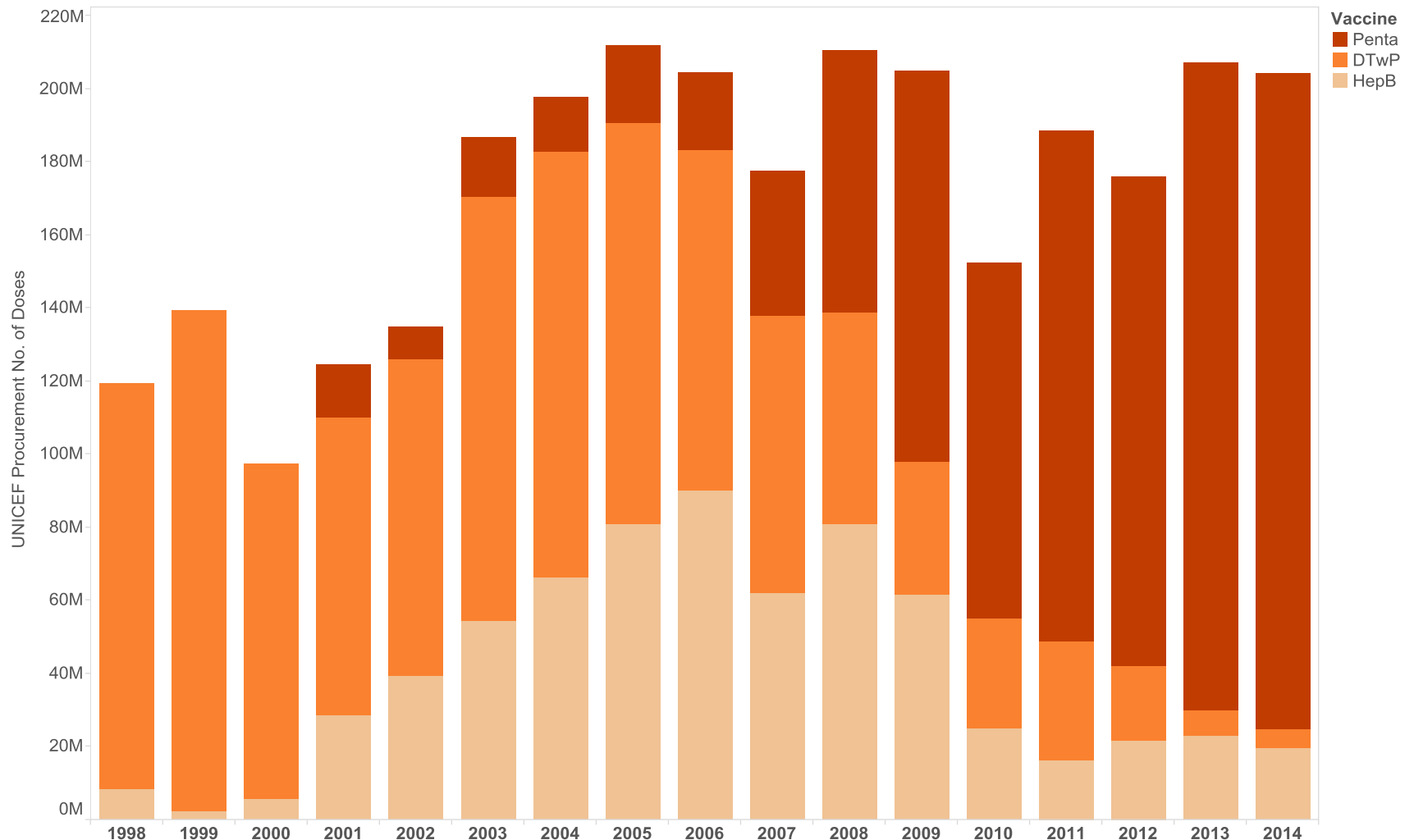


Changing Demand Landscape - 2014



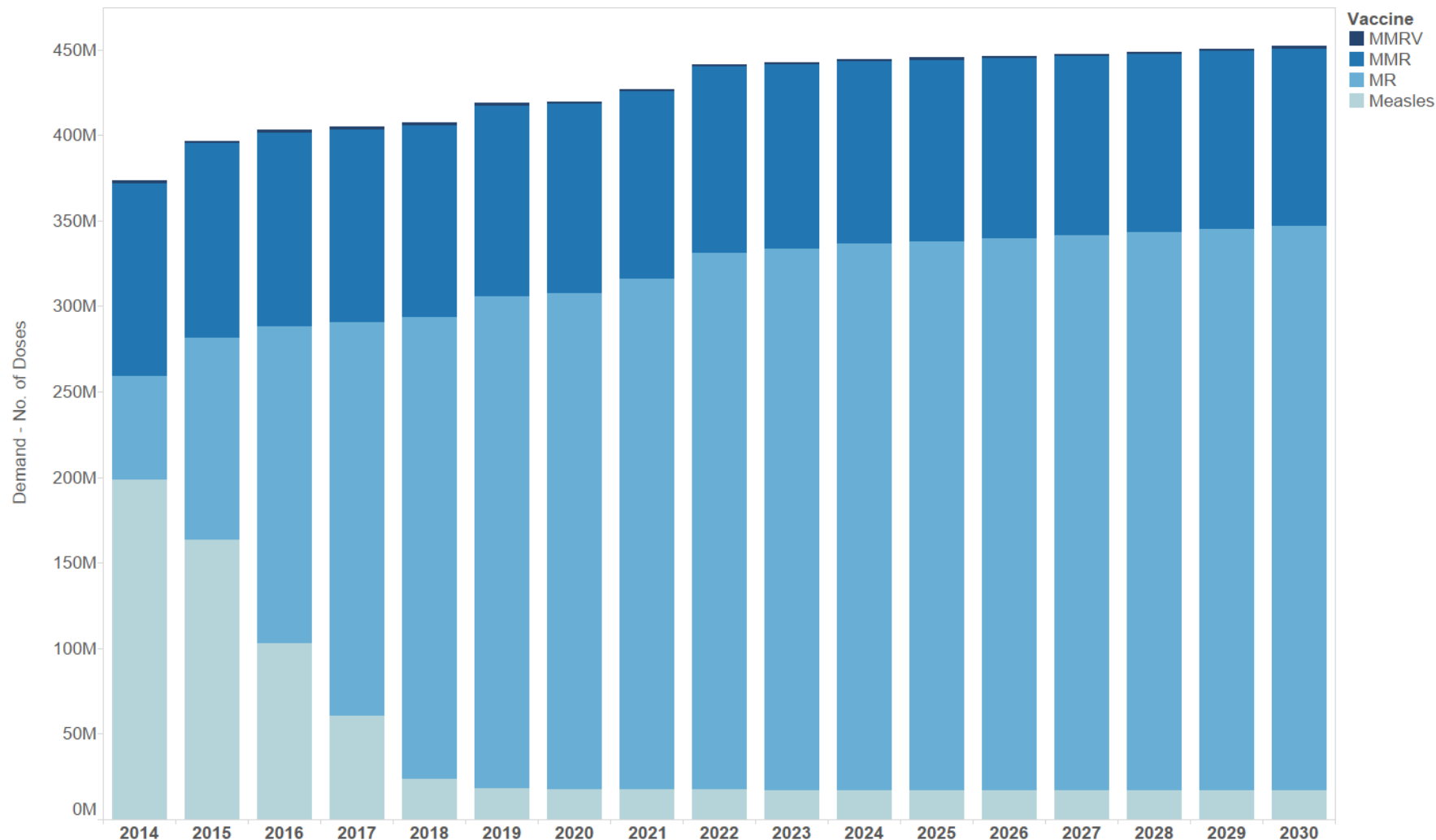
New Product Combinations – DTP Family

1998-2014



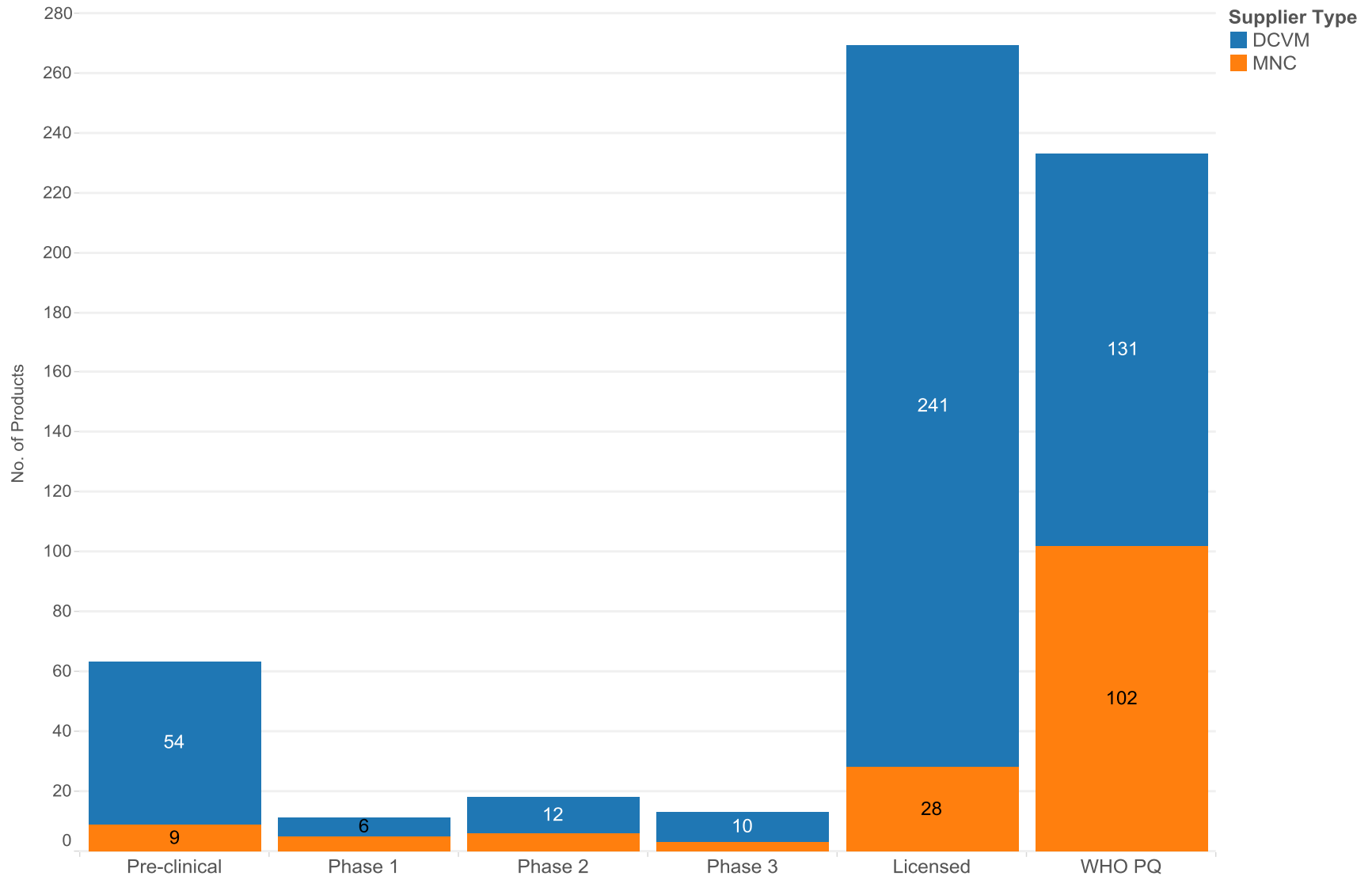
Source: UNICEF public data

New Product Combinations – Measles Family 2014-2030



Source: PATH Global Vaccines Market Model. Provided for illustrative purposes only

New Products in the Pipeline



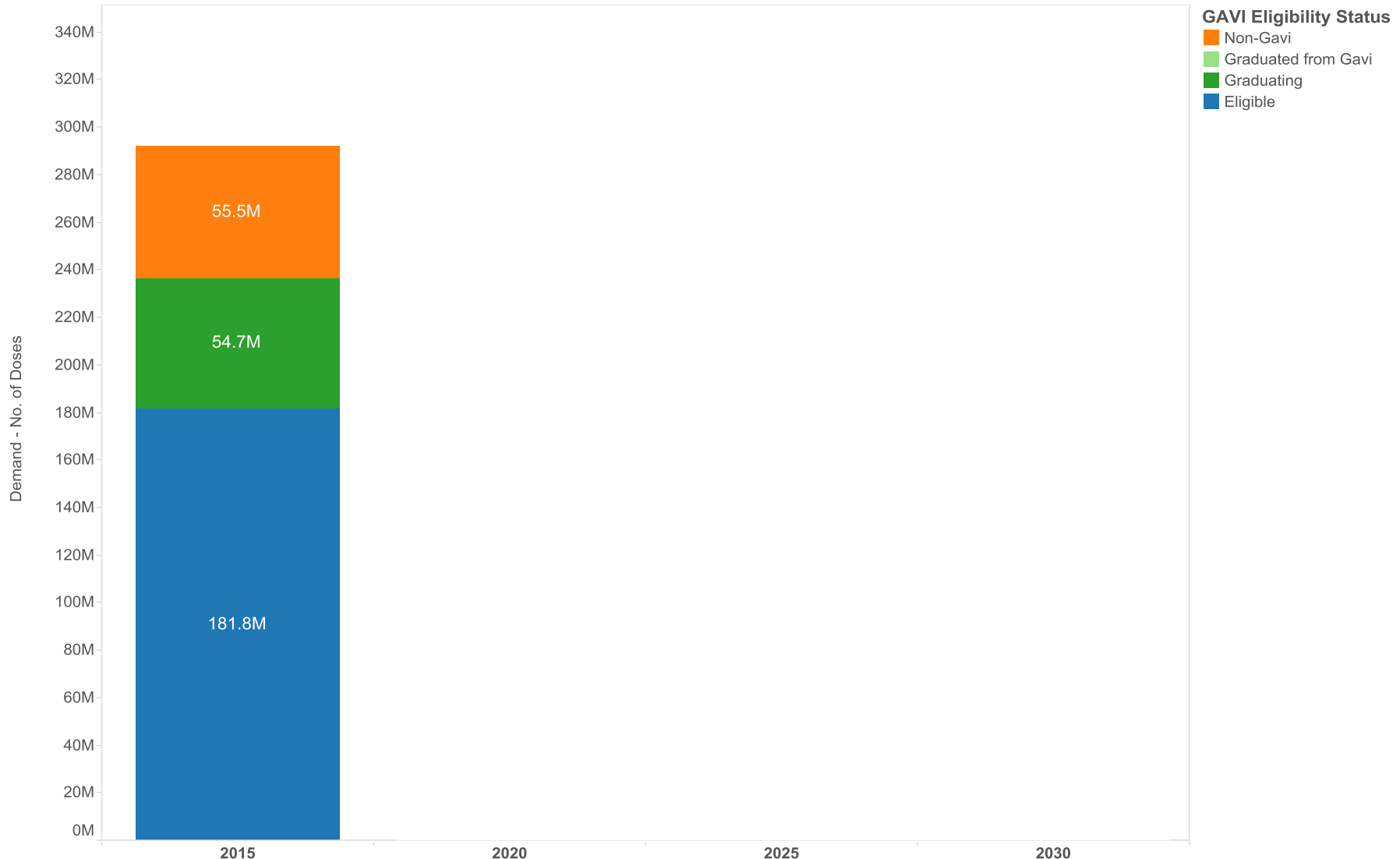
Source: WHO public data; PATH and partners' analysis, July 2015

Examples of Manufacturers Leading the Way

- Chengdu Institute of Biological Products (CDIBP)
Japanese encephalitis
- Serum Institute of India Ltd.
Meningitis A

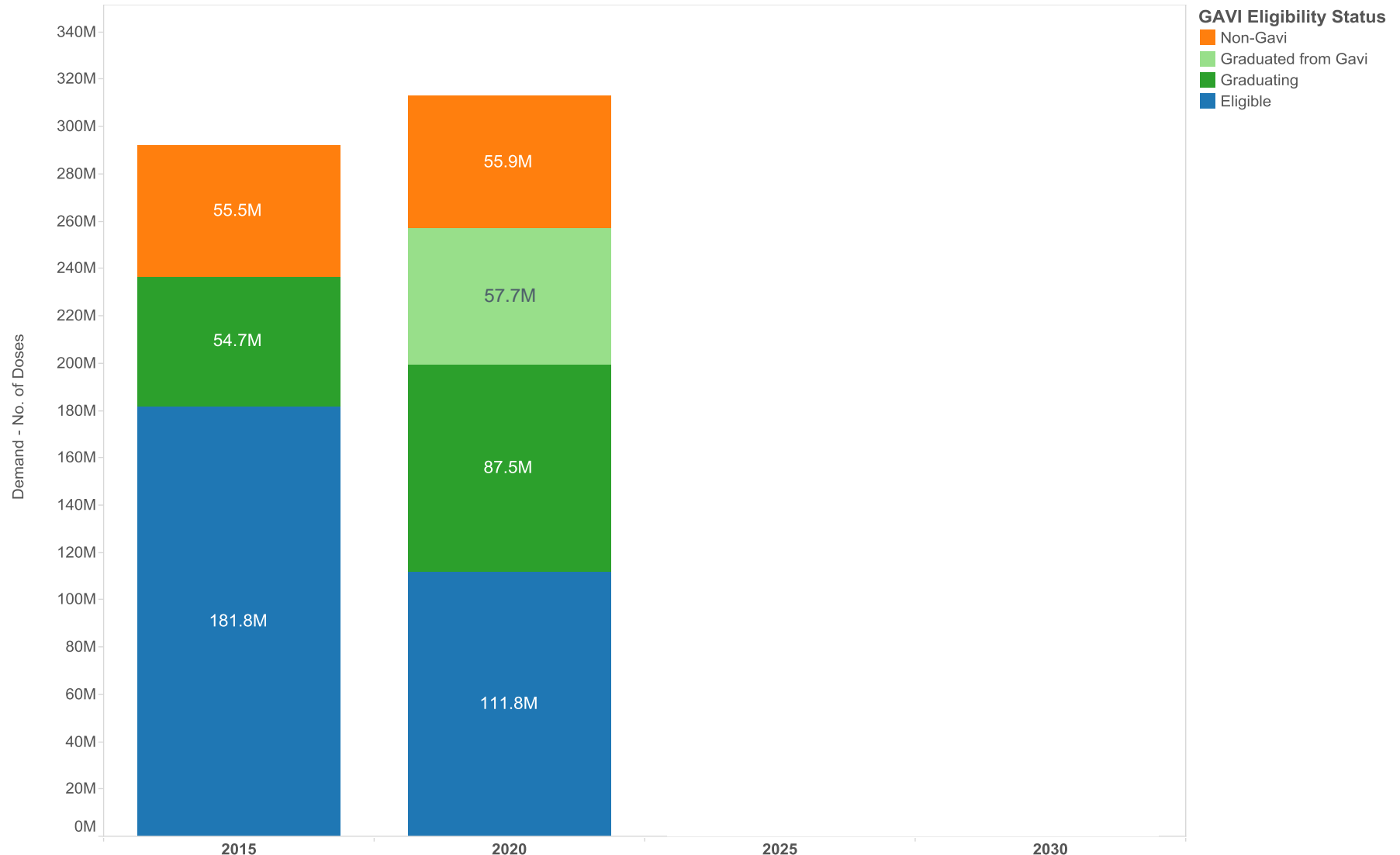


New Markets (Gavi Graduation 2015-30)



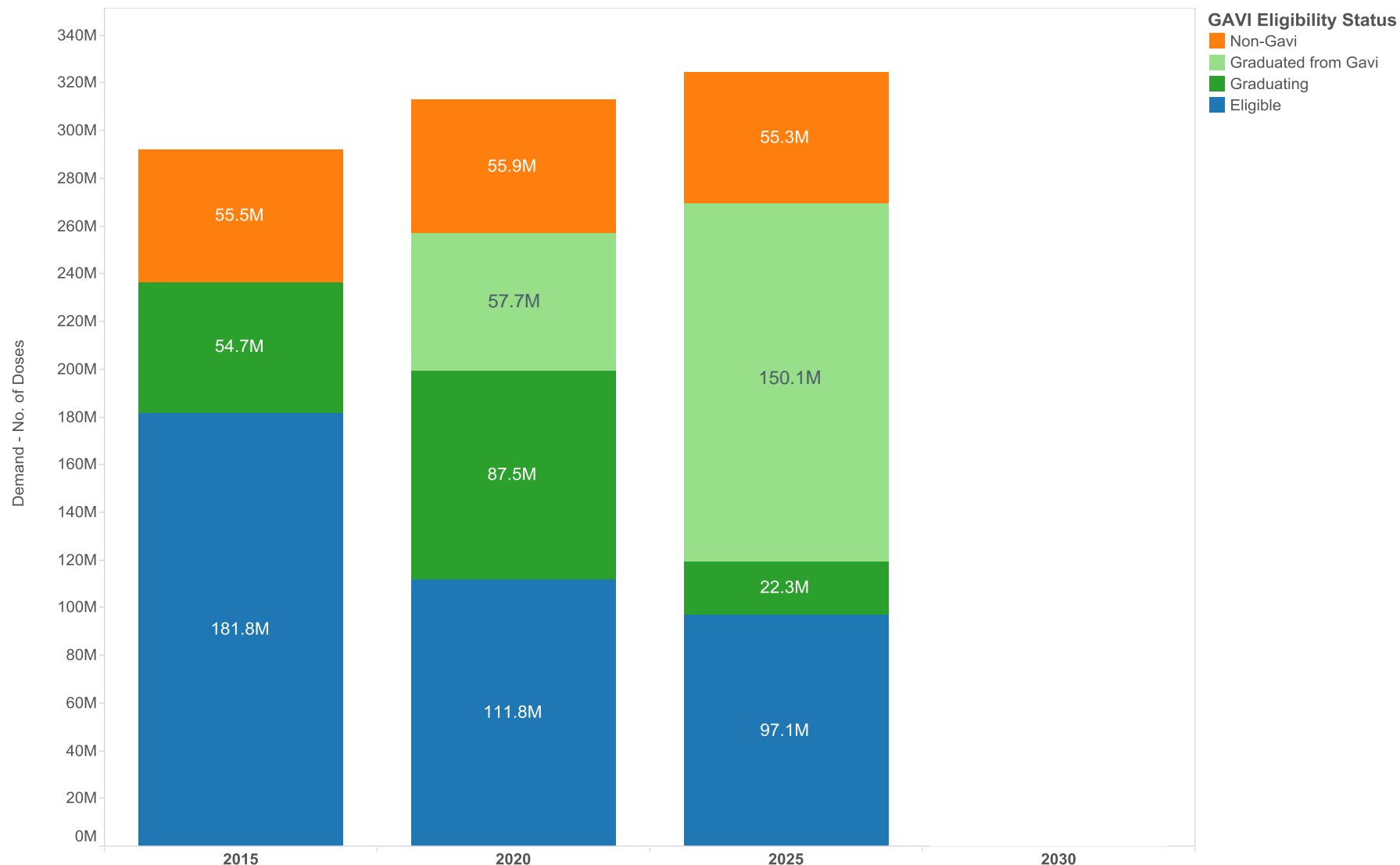
Source: PATH Global Vaccines Market Model. Provided for illustrative purposes only.

New Markets (Gavi Graduation 2015-30)



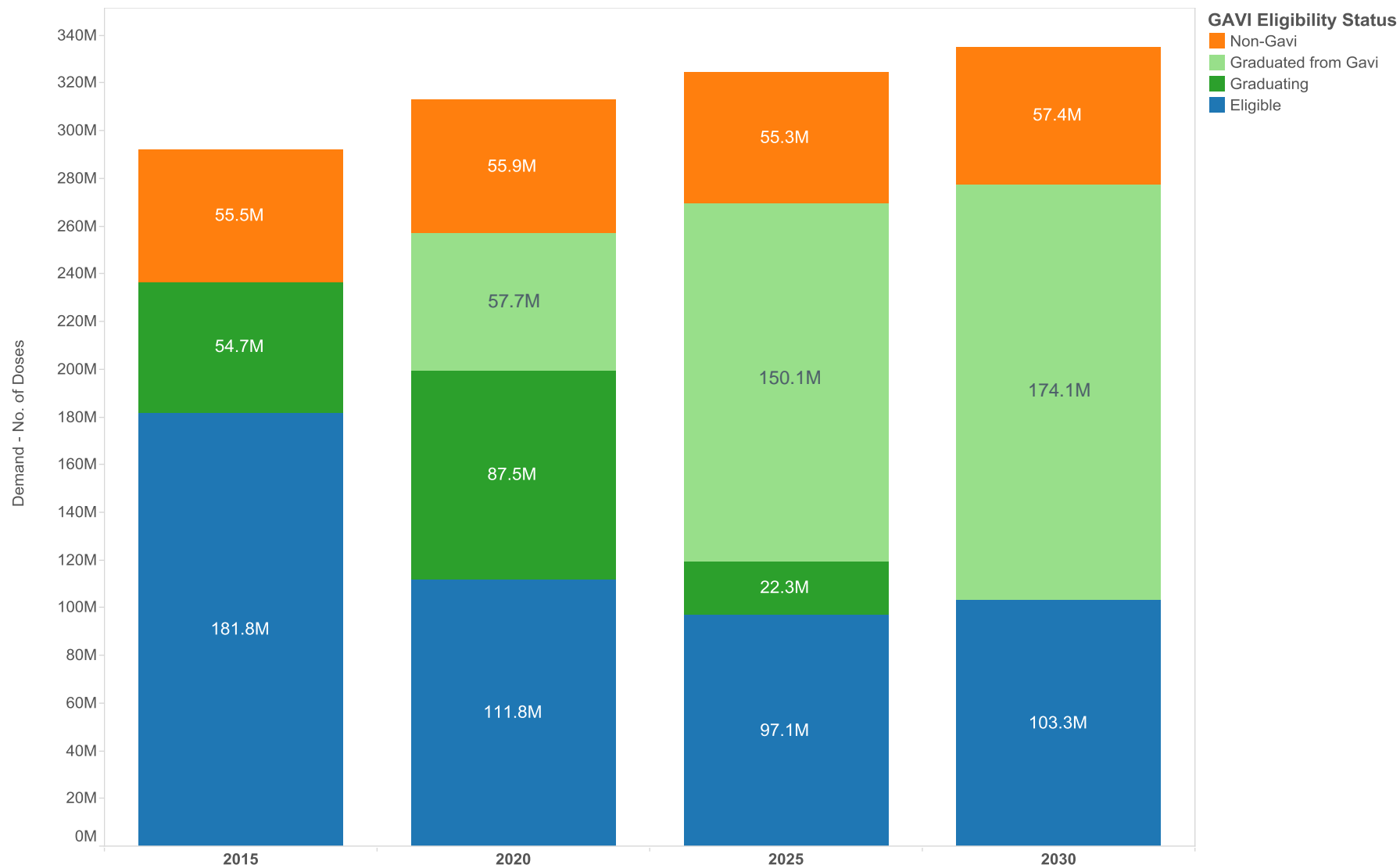
Source: PATH Global Vaccines Market Model. Provided for illustrative purposes only.

New Markets (Gavi Graduation 2015-30)



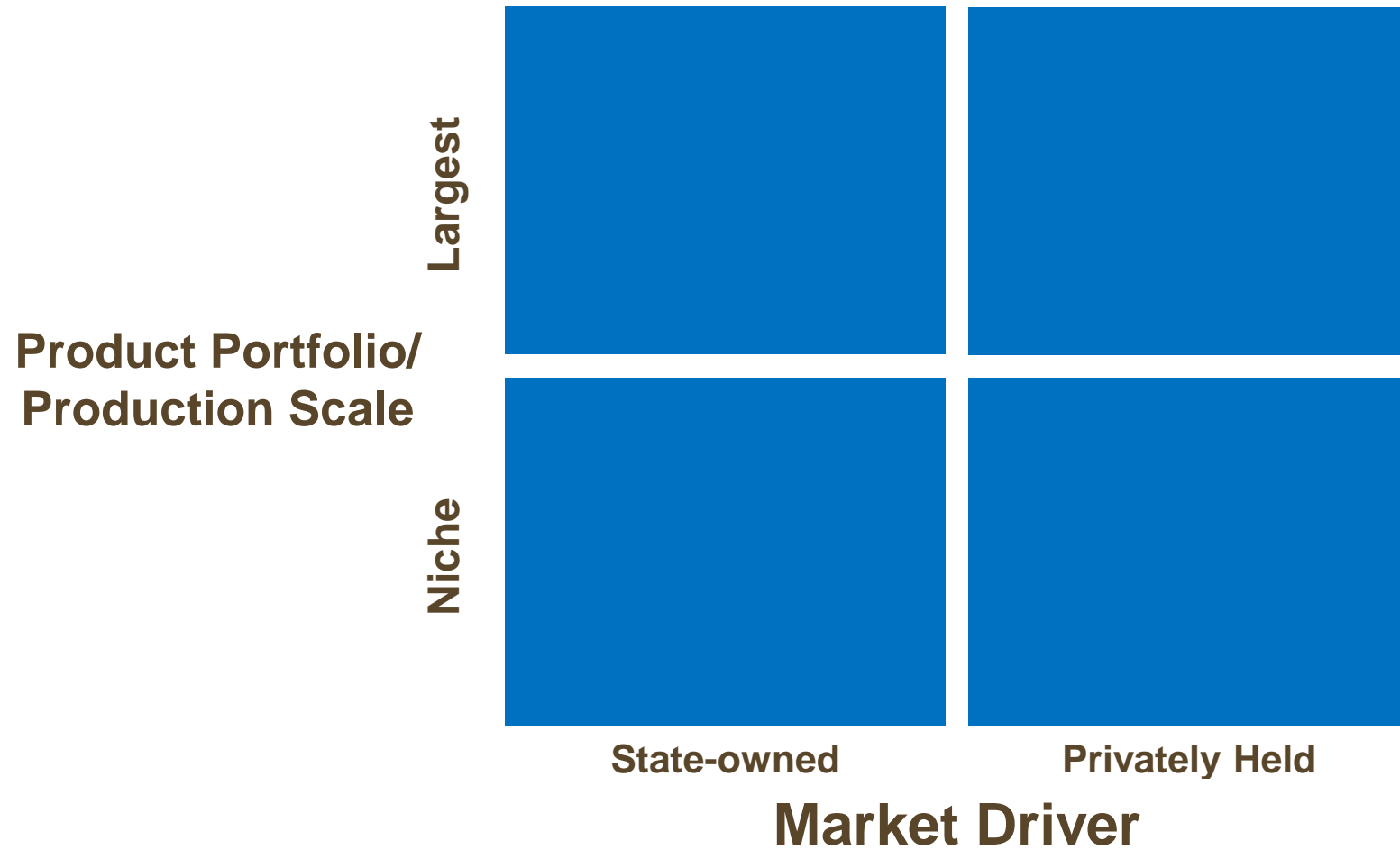
Source: PATH Global Vaccines Market Model. Provided for illustrative purposes only.

New Markets (Gavi Graduation 2015-30)

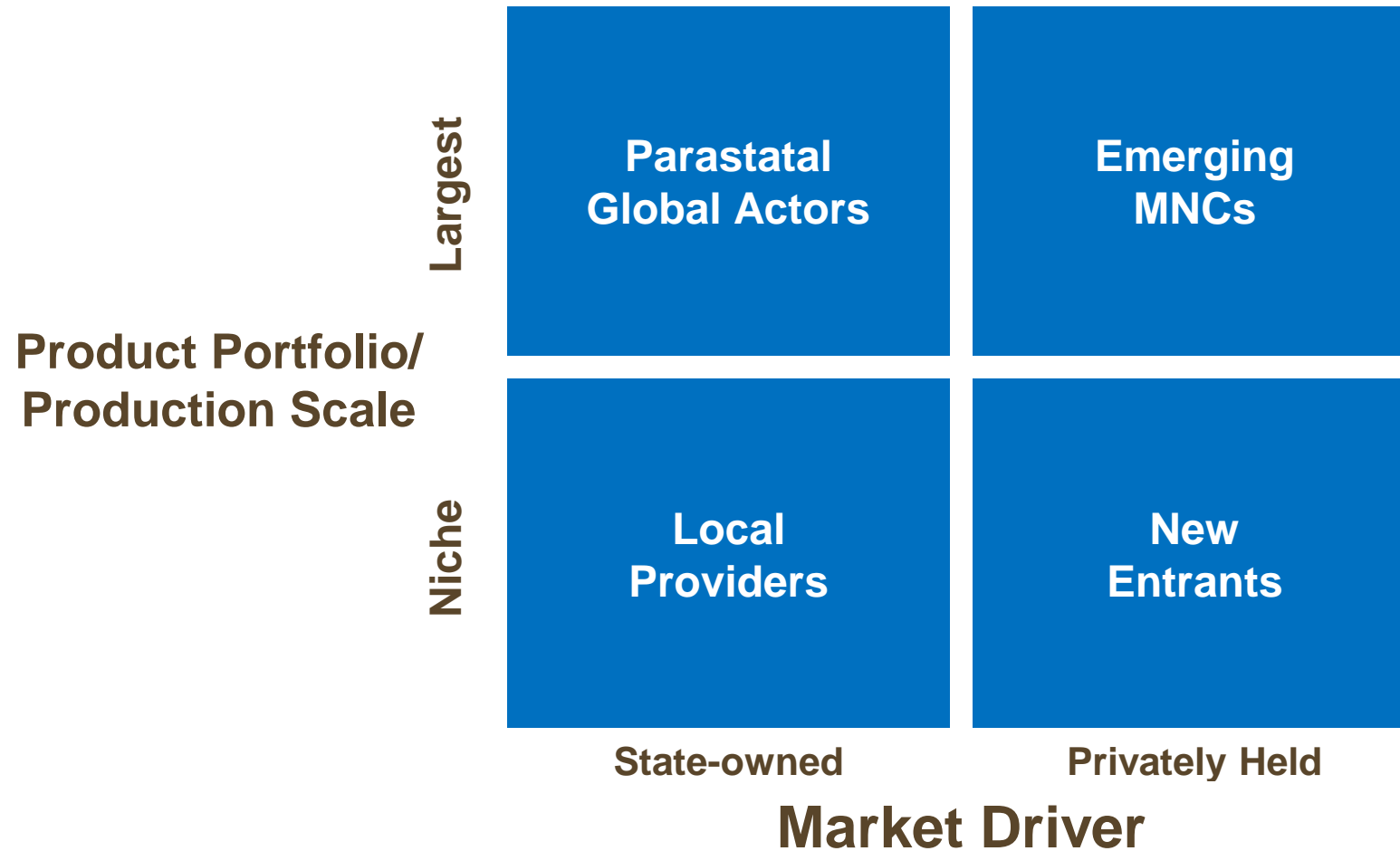


Source: PATH Global Vaccines Market Model. Provided for illustrative purposes only.

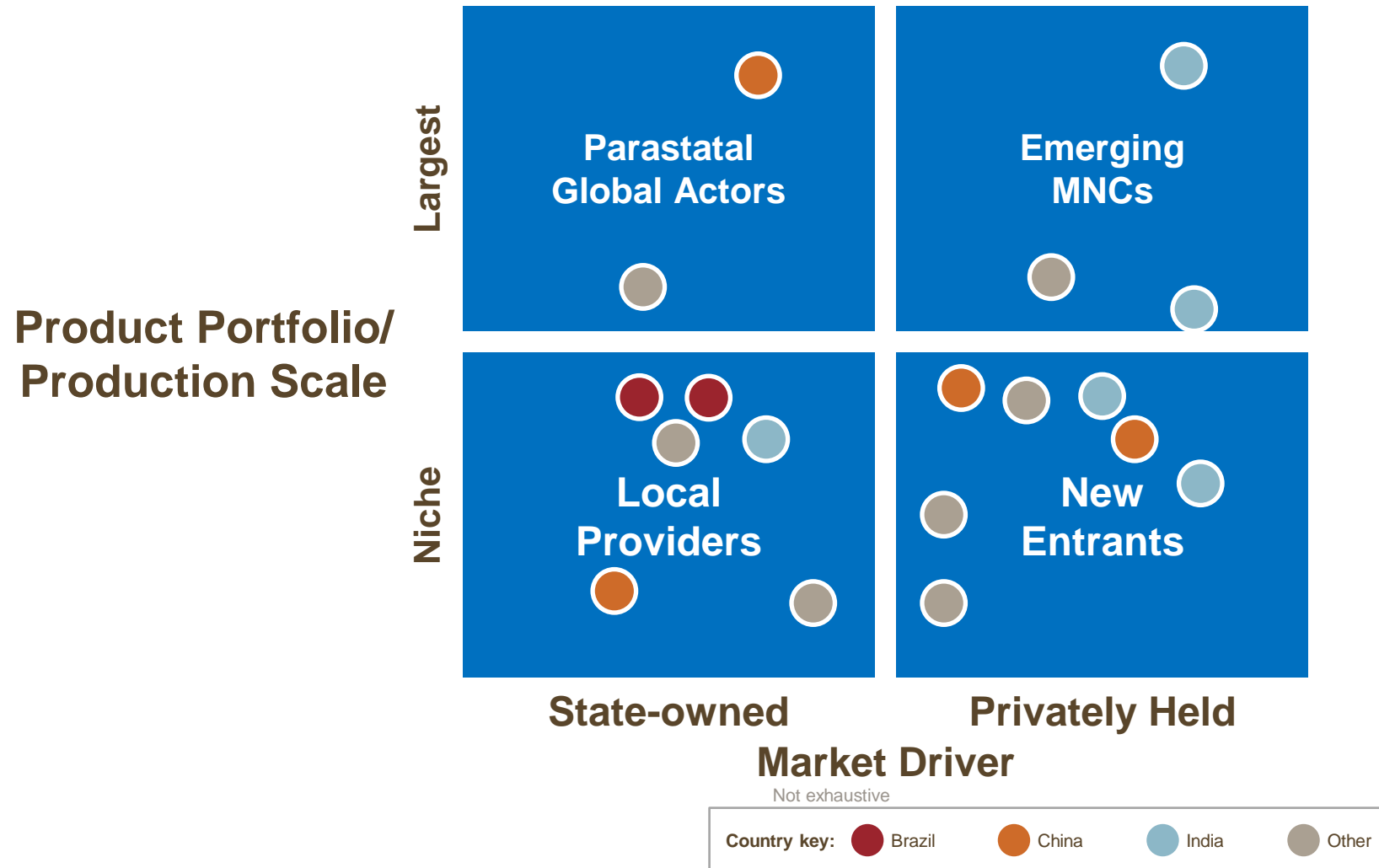
DCVM diversity



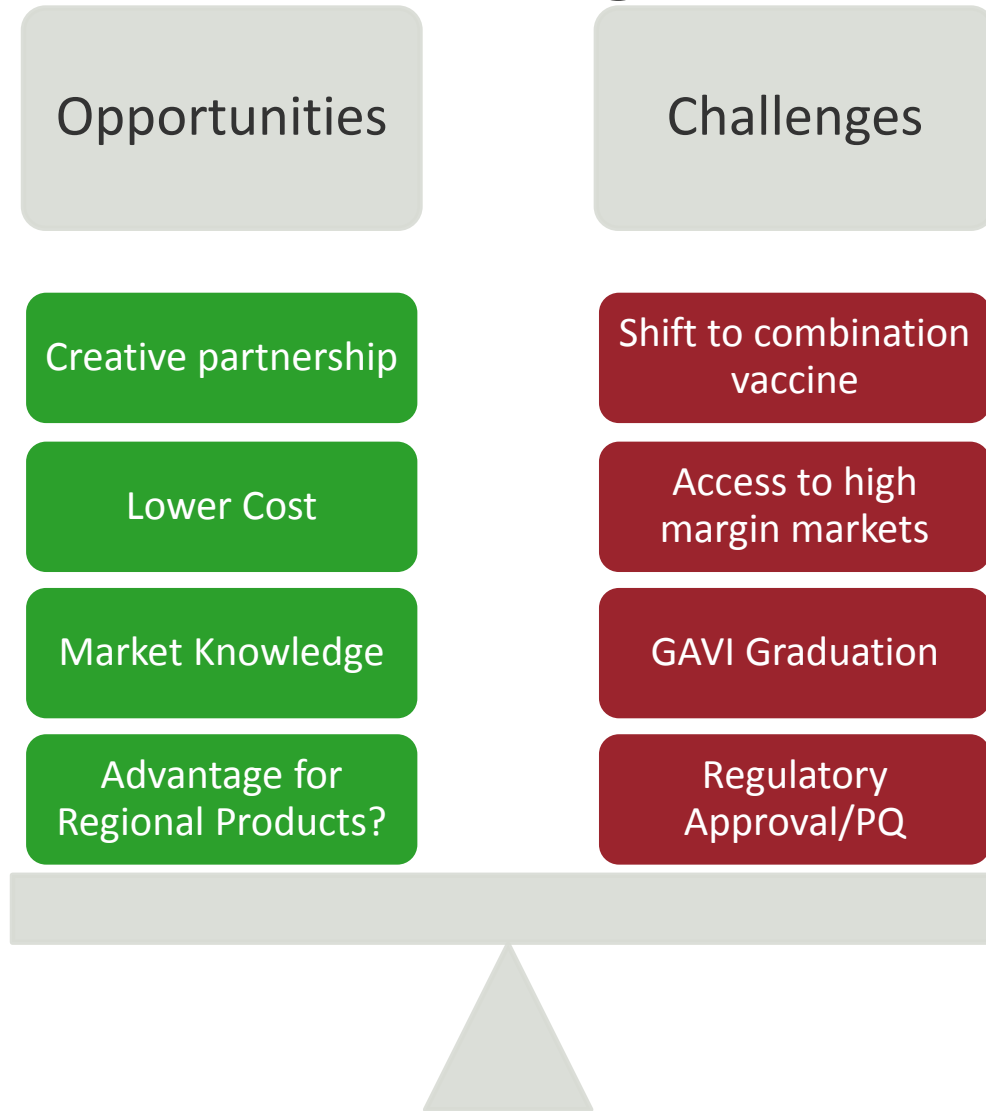
DCVM diversity



DCVM diversity



Opportunities and Challenges for the Future



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