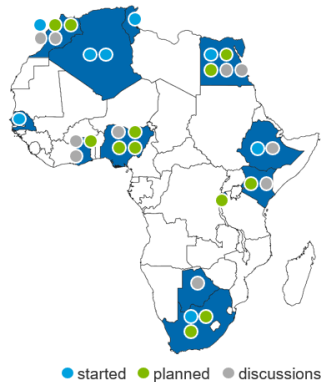


Annex B: Rationale for initial illustrative vaccine product prioritisation

Gavi engagement with regional partners: shape product portfolios to secure initiative sustainability & efficient outcomes

30+ public vaccine manufacturing announcements made to date...



...Gavi to work with continental partners to help prioritise and coordinate across initiatives

Degree of priority for Gavi	A Antigens with clear market health need for additional (e.g., "regional") manufacturers <i>Antigens prioritised by Gavi with most needs</i>
	B Antigens needing enhanced product profiles
	C Antigens where a new supplier would not improve / may deteriorate overall market health
	D Potential pre-VIS vaccines for unaddressed diseases, especially with African relevance

	Scale-up of African Vaccine Manufacturers	Impact on Incumbent Manufacturers	Competitive Reaction by Incumbent Manufacturers	Overall impact to sustainable competition in the market	
Antigens with clear market health need A	MR <ul style="list-style-type: none"> 50Mn dose DS capacity modelled to enter market earliest 2026 and serve ~40% of the African Gavi market. COGS for MR allow AVMs to enter at competitive market prices. 	<ul style="list-style-type: none"> Incumbents lose market share to new AVM supplier. 	<ul style="list-style-type: none"> Incumbents have lower COGS and therefore the option to lower prices to maintain market share. But, expected not to exercise this option if tender is weighted towards regional diversification. 	<ul style="list-style-type: none"> Supplier diversification of DS partially supports sustained competition. Stable or potential slight reduction to WAP anticipated 	
	OCV <ul style="list-style-type: none"> 20Mn dose DS capacity modelled to enter market earliest 2026 (through IIVI TT) and partially serve African Gavi market. COGS for OCV allow AVMs to enter at competitive market prices. 	<ul style="list-style-type: none"> AVM supplier to contribute to required supply buffer - no significant effect on incumbents anticipated. 	<ul style="list-style-type: none"> No reaction from incumbent manufactures anticipated. 	<ul style="list-style-type: none"> Supplier diversification of DS partially supports supply security. Stable or minimal changes to WAP anticipated. 	
	Malaria <ul style="list-style-type: none"> 50Mn dose DP capacity modelled to enter market earliest 2027 (through SII TT) and serve ~30% of African Gavi market. No COGS data available – pricing expected between RTSS & R21. 	<ul style="list-style-type: none"> Most likely scenario for AVM supplier to cannibalize SII DP share given smaller volume expectations for other suppliers. 	<ul style="list-style-type: none"> Likely no reaction from other incumbent manufactures – due to limited capacity. 	<ul style="list-style-type: none"> Supplier diversification of DP partially supports sustained competition. Slight increase of WAP expected vs. counterfactual of SII serving market from India. 	
	Ebola <ul style="list-style-type: none"> 250k dose DS capacity expected to enter market earliest 2029 and serve 50% of the Gavi stockpile. No COGS data available – potential to price competitively to incumbent. 	<ul style="list-style-type: none"> Incumbents lose market share to new AVM supplier. 	<ul style="list-style-type: none"> Increase price due to cover increased COGS. 	<ul style="list-style-type: none"> Supplier diversification of DS partially supports sustained competition. Increase of WAP expected 	

Legend: ■ Green = Positive
■ Orange = Neutral
■ Red = Negative

See also table in Annex A giving qualitative market dynamics analysis of categories B and C.