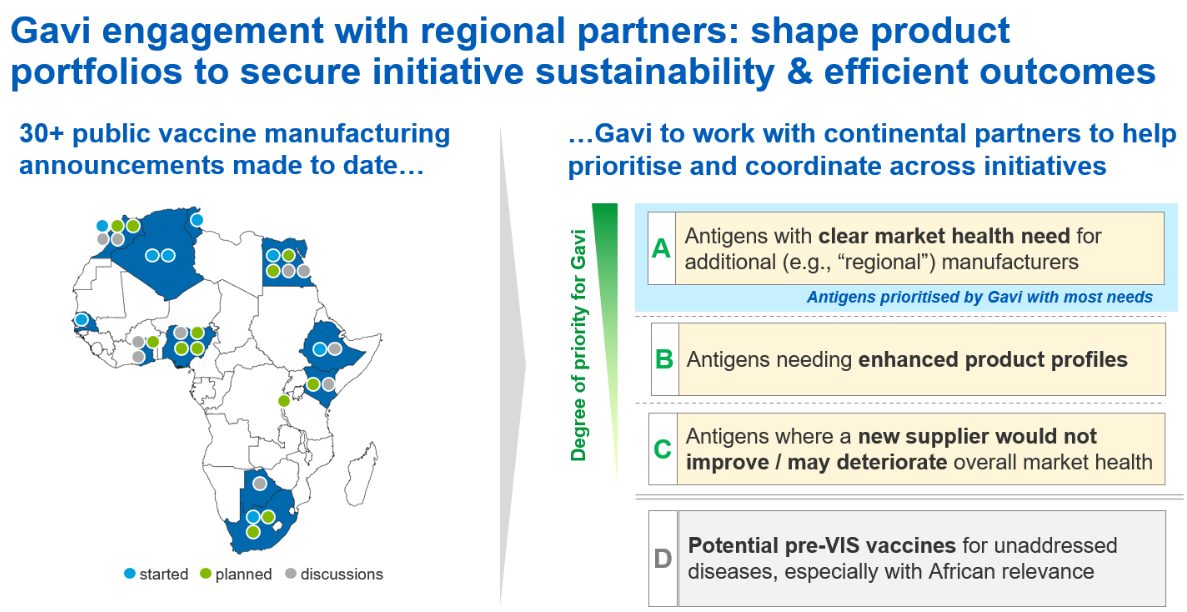
Annex B: Rationale for initial illustrative vaccine product prioritisation



A – Antigens with clear market health need

	Scale-up of African Vaccine Manufacturers	Impact on Incumbent Manufacturers	Competitive Reaction by Incumbent Manufacturers	Overall impact to sustainable competition in the market
MR	• 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.	• Incumbents lose market share to new AVM supplier.	• 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.	• Supplier diversification of DS partially supports sustained competition. • Stable or potential slight reduction to WAP anticipated
OCV	• 20Mn dose DS capacity modelled to enter market earliest 2026 (through IVI TT) and partially serve African Gavi market. • COGS for OCV allow AVMs to enter at competitive market prices.	• AVM supplier to contribute to required supply buffer - no significant effect on incumbents anticipated.	• No reaction from incumbent manufactures anticipated.	• Supplier diversification of DS partially supports supply security. • Stable or minimal changes to WAP anticipated.
Malaria	• 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.	• Most likely scenario for AVM supplier to cannibalize SII DP share given smaller volume expectations for other suppliers.	• Likely no reaction from other incumbent manufactures – due to limited capacity.	• Supplier diversification of DP partially supports sustained competition. • Slight increase of WAP expected vs. counterfactual of SII serving market from India.
Ebola	• 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.	• Incumbents lose market share to new AVM supplier.	• Increase price due to cover increased COGS.	• 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.