

The state of play: Industry vaccine trends from the Access to Medicine Index **GVIRF Presentation**

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About the Access to Medicine Foundation

- The Foundation stimulates and guides pharmaceutical companies to improve access to medicine and limit drug-resistant infections.
- The Foundation was founded in 2005 and has published its flagship Access to Medicine Index since 2008.
- The Foundation is a non-profit organisation and does not receive any funding from the pharmaceutical industry.



Ministry of Foreign Affairs



Ministry of Health, Welfare and Sport

BILL & MELINDA
GATES *foundation*



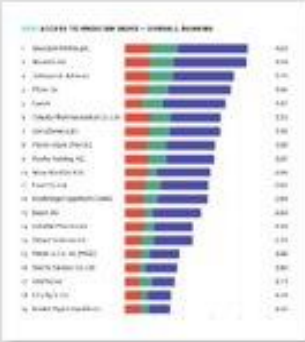
Investment
Managers



The 2021 Index

What we measure

Scale and Scope of the 2021 Access to Medicine Index



3 KEY FINDINGS

10+ LEADING GRAPHICS

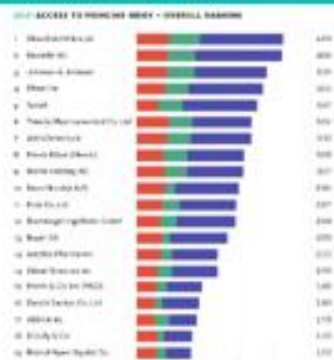
3 TECHNICAL AREAS

20 DETAILED COMPANY REPORT CARDS

20+ BEST PRACTICES

Analysis scopes

COMPANY SCOPE



20 companies

- Selected based on a combination of market capitalisation and relevance of pipeline and portfolio for access to medicine

GEOGRAPHIC SCOPE



106 low- and middle-income countries

DISEASE SCOPE



82 diseases, conditions and pathogens

- 23 Communicable Diseases
- 17 Non-communicable Diseases
- 20 Neglected Tropical Diseases
- 10 Maternal & Neonatal Health Conditions
- 12 Priority Pathogens

PRODUCT TYPE SCOPE



Medicines, microbicides, preventive vaccines, therapeutic vaccines, vector control products, platform technologies, diagnostics, contraceptive methods and devices

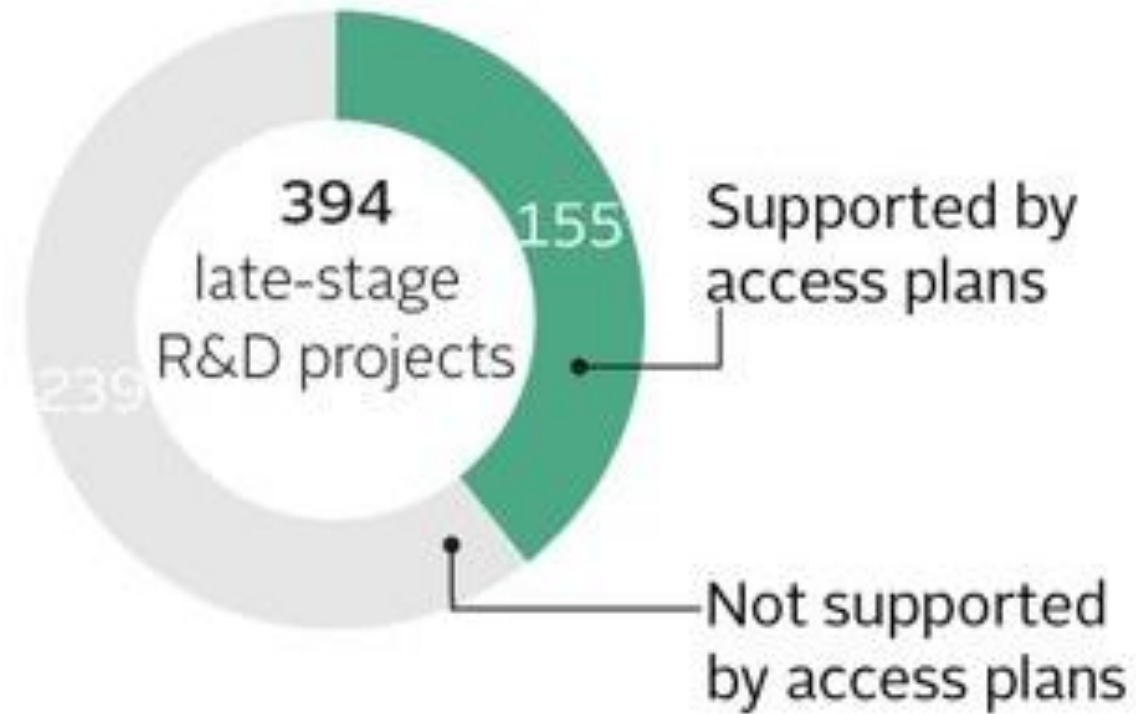
The 2021 Index

Emerging vaccine issues and the road ahead

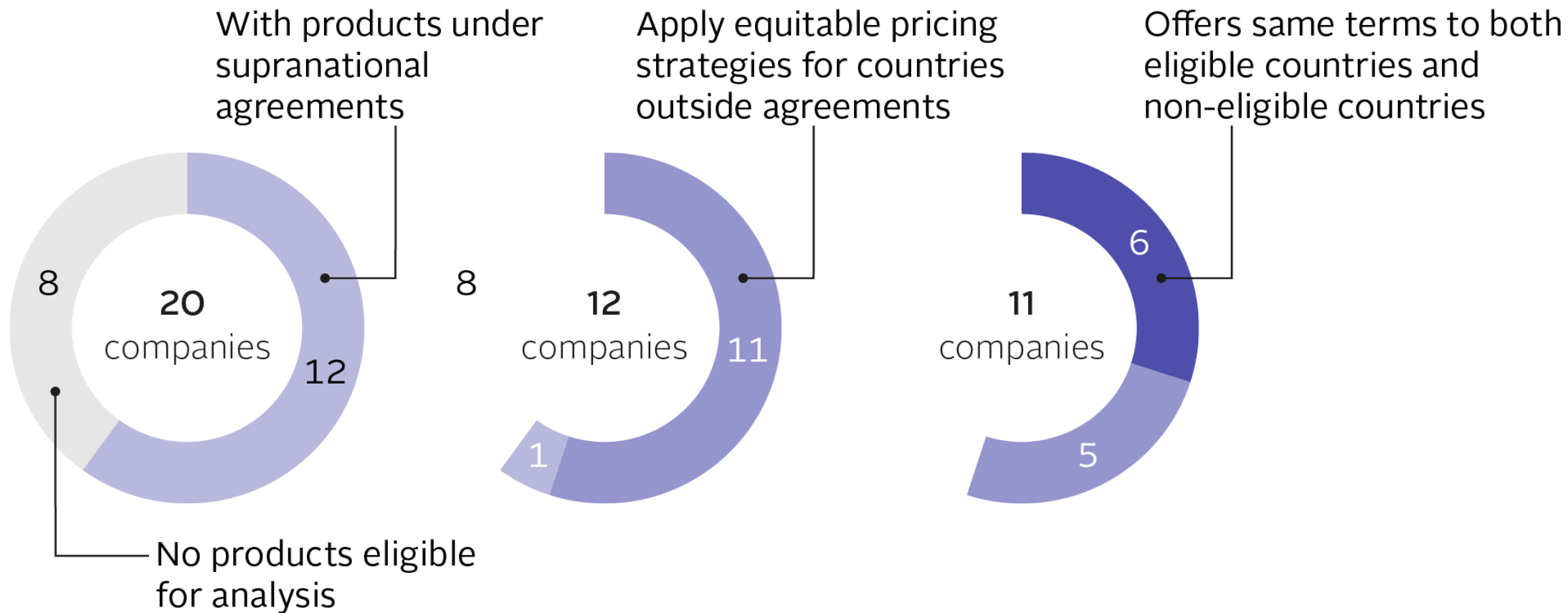
No companies involved in R&D for 10 of the 16 emerging infectious diseases

Disease flagged as an epidemic/pandemic risk	R&D projects targeting each disease		Pharma companies engaged in R&D	
	2018	2020	2018	2020
Arenaviral haemorrhagic fevers (incl. Lassa fever)	0	0	0	0
Chikungunya	3	4	3	4
Crimean-Congo haemorrhagic fever	0	0	0	0
Ebola	7	5	5	4
Emergent non-polio enteroviruses (including EV71, D68)	1	1	1	1
Marburg	1	1	1	1
Middle East resp. syndrome coronavirus (MERS-CoV)	0	0	0	0
Nipah	0	0	0	0
Other bunyaviral diseases	0	0	0	0
Other filoviral diseases	0	0	0	0
Other henipaviral diseases	0	0	0	0
Other highly pathogenic coronaviral dis. (incl. COVID-19)	0	63	0	17
Rift Valley fever	0	0	0	0
Severe acute respiratory syndrome (SARS)	0	0	0	0
Severe fever with thrombocytopenia syndr. (SFTS)	0	0	0	0
Zika	3	4	3	4

Are companies planning ahead for access?

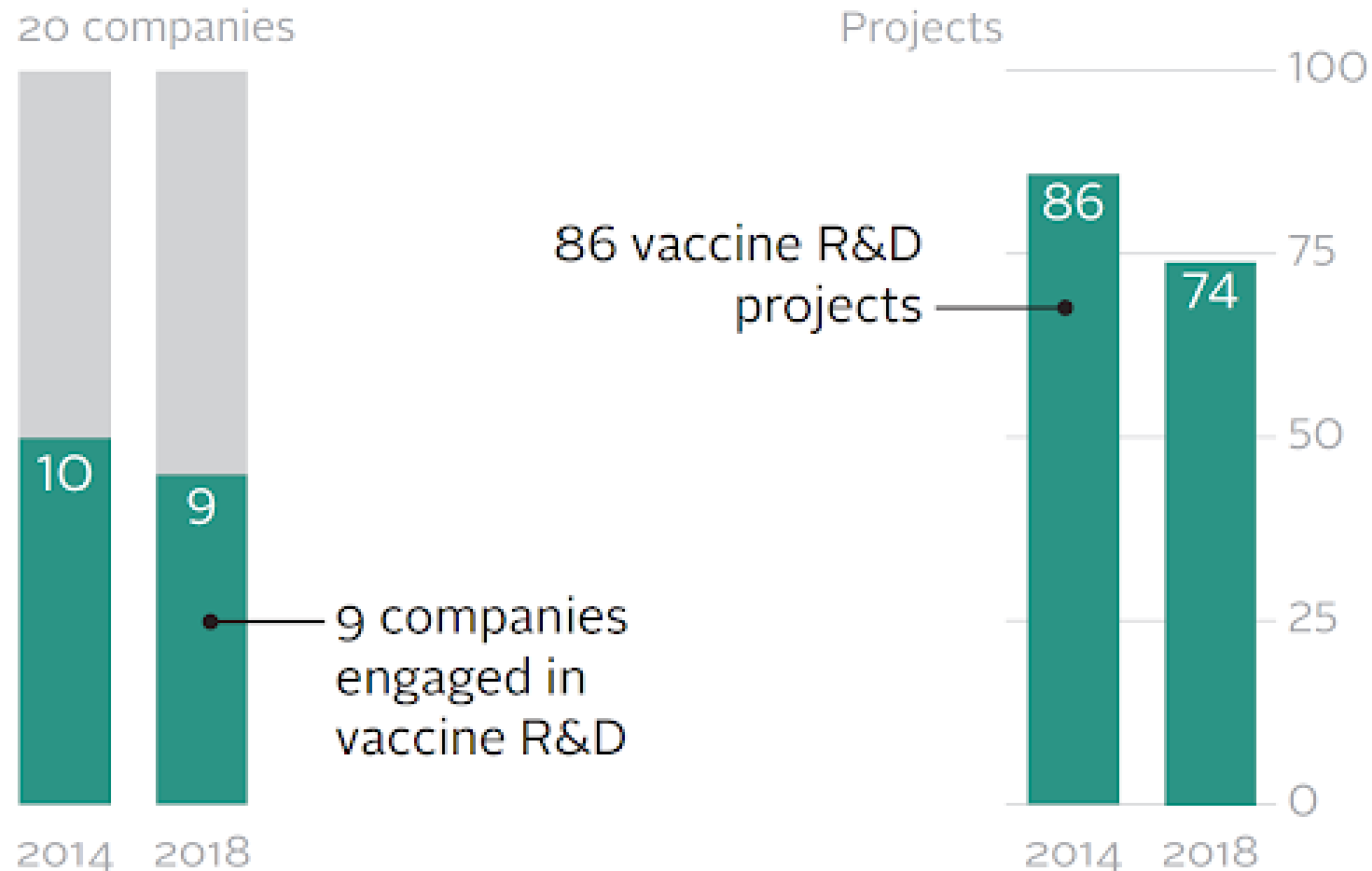


How many companies have supranational agreements (e.g., partnerships with Gavi, the Vaccine Alliance) and do they offer the same terms to non-eligible countries?



Lessons learned from the past decade
Trends from the Access to Medicine Foundation

Company involvement in vaccine development remains relatively constant since 2014



Further work is urgently needed

- Few companies have been active in developing vaccines for HIV/AIDS, malaria and tuberculosis, that kill over 2.4 million people a year.
- This is in stark contrast to company efforts to develop vaccines for lower respiratory infections, meningitis, and in 2021, COVID-19 which tend to have promising market potential in high-income countries.
- Less lucrative diseases, in particular NTDs and infections caused by drug-resistant bacteria, have received almost no attention in the last 10 years from companies in scope with regards to vaccine R&D, with the exception of dengue.

Factors encouraging vaccine development

- Advanced market commitments and market-shaping mechanisms directly address the fragility and uncertainty of pharmaceutical markets for specific products or in certain geographic regions.
- E.g., pooled procurement mechanisms used by organisations such as Gavi, the Vaccine Alliance; the Pan American Health Organization (PAHO); and UNICEF have helped to strengthen and provide security to the global vaccine market.
- COVID-19 has proven that vaccine development can be expedited to unprecedented speeds when global priorities are clear and advanced market commitments are in place.
- Companies must be incentivised to proactively address areas where urgent R&D action is still needed, and partner with other manufacturers both to prevent the next pandemic, but also to move forward with vaccine development for other disease areas.

Thank you

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