

Vaccine Procurement
Practitioners Network

VPPN

WEBINAR SERIES



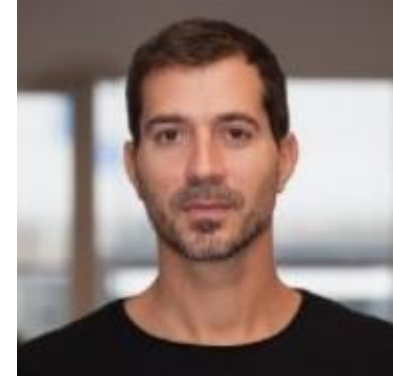
**Thematic Discussion 8:
Market Intelligence**

21 August 2018

unicef  for every child

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VPPN 2017-18 Webinar Series

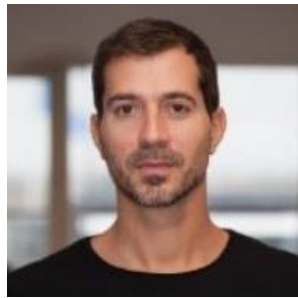


Moderator: Loic Sanchez
Supply Officer
(Immunization)
Vaccine Centre
UNICEF Supply Division
Location: Copenhagen

VPPN 2017-18 Webinar Series

Webinar 8: Market Intelligence

1. Supply
2. Price
3. Financing
4. Planning / Forecasting
5. Registration / Regulation
6. Cold chain
7. Procurement process
- 8. Market Intelligence**



*Speaking now
Loic Sanchez,
Moderator*

Today's Presenters



Philipp Kalpaxis

Market Research Manager
(Markets, Supplier Financing and Innovation Centre)
UNICEF Supply Division
Denmark



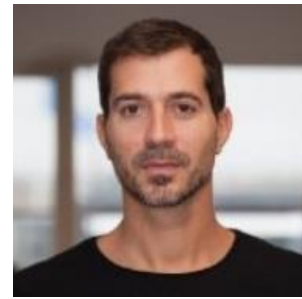
Aadrian Sullivan

Information Management/Communications Specialist
(Markets, Supplier Financing and Innovation Centre)
UNICEF Supply Division
Denmark



Heba Almohtaseb

Vaccine Procurement officer
Joint Procurement Department,
Ministry of Health
Jordan



Speaking now
Loic Sanchez,
Moderator

Presentation #1: Vaccine Market Intelligence



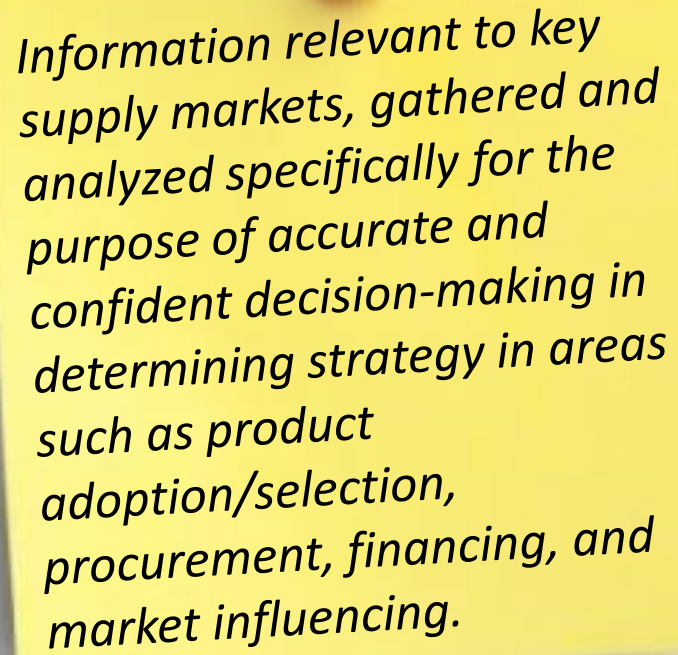
Speaking now

Philipp Kalpaxis
Market Research Manager
(Markets, Supplier
Financing and Innovation
Centre)

UNICEF Supply Division

Denmark

What is meant by 'market intelligence'?



Information relevant to key supply markets, gathered and analyzed specifically for the purpose of accurate and confident decision-making in determining strategy in areas such as product adoption/selection, procurement, financing, and market influencing.

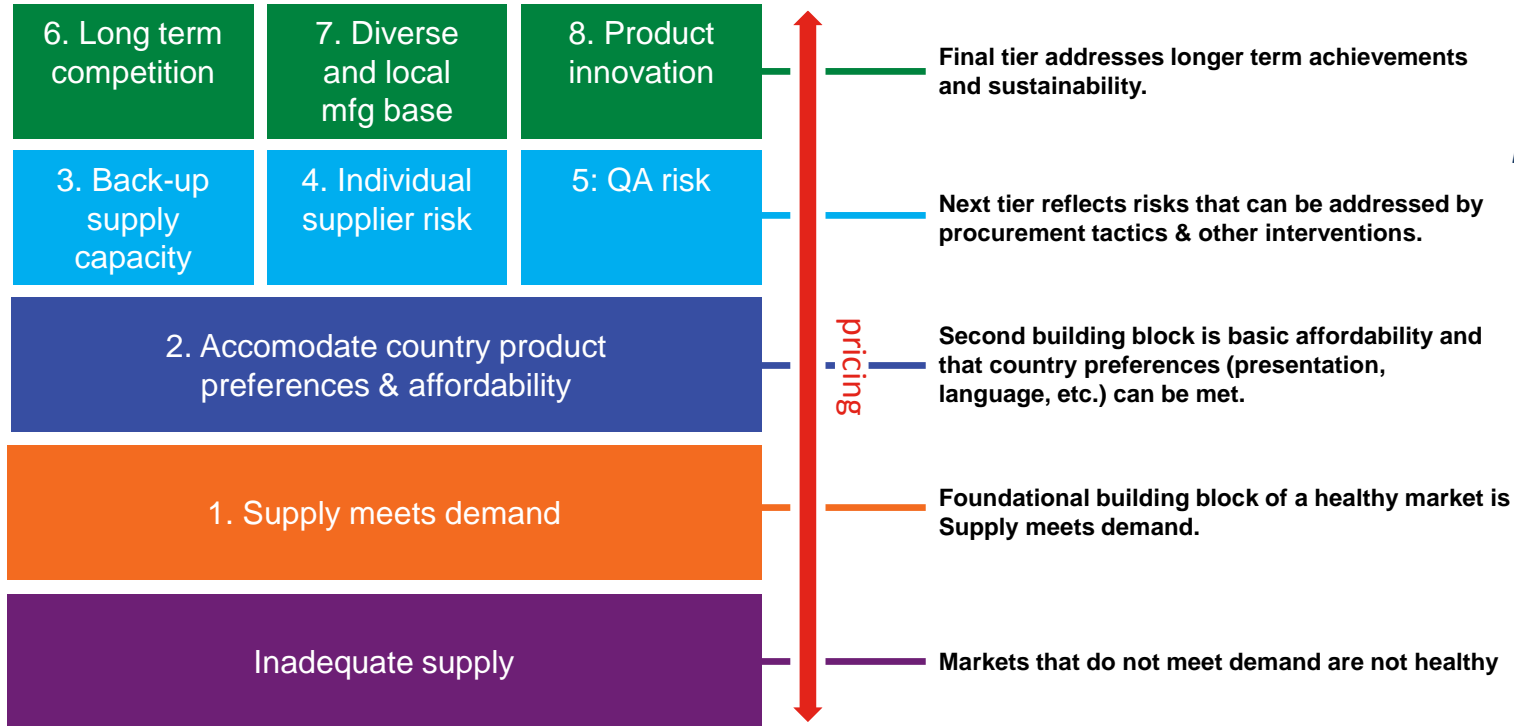


Speaking now
Philipp Kalpaxis
Market Research Manager
UNICEF SD

UNICEF uses market intelligence to develop procurement strategies in support of achieving healthy markets



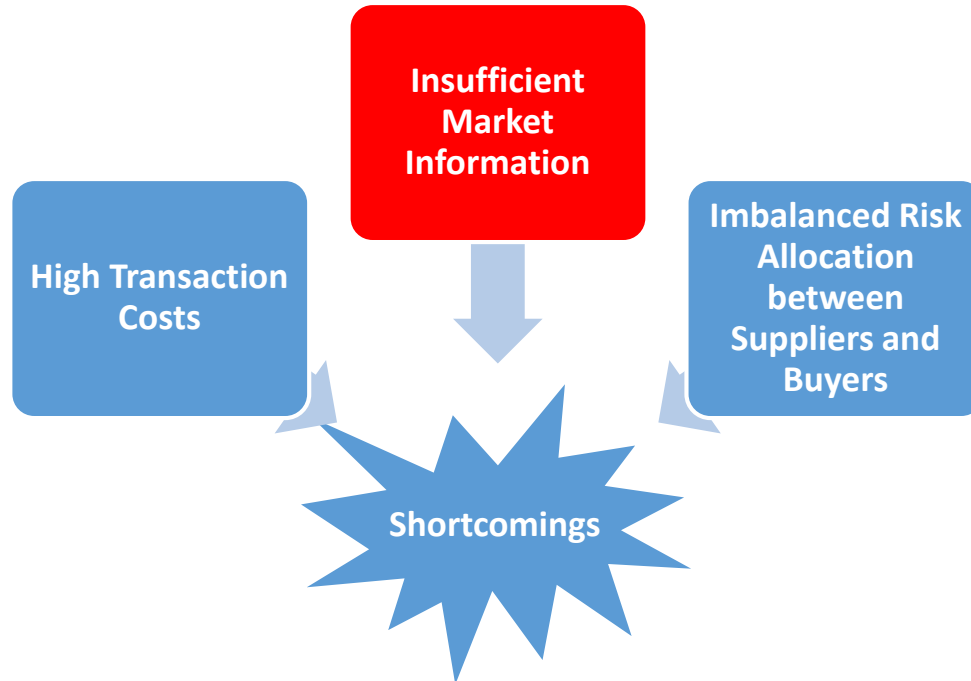
Speaking now
Philipp Kalpaxis
Market Research Manager
UNICEF SD



Root Causes for market/procurement inefficiencies



Speaking now
Philipp Kalpaxis
Market Research Manager
UNICEF SD



Information scarcity in vaccine markets



- Concentrated supplier base
- Limited number of large purchasers
- New business models emerging (e.g. market segmentation, price differentiation)



Speaking now
Philipp Kalpaxis
Market Research Manager
UNICEF SD

→ UNICEF and partners are making significant efforts to increase publicly available information on vaccine markets and to support in particular public-sector vaccine purchasers to build up the capacity to generate, share and strategically utilize market intelligence.

Market Information – UNICEF web portal



Speaking now

Adrian Sullivan

*Information Management/
Communications Specialist*

UNICEF SD

Market Influencing

A strategic focus on essential supplies

UNICEF focuses on commodities that are essential for the needs of children and contribute to the achievement of the Sustainable Development Goals (SDGs). Some commodities are easily available and affordable, while the availability of others is limited, or in some instances, non-existent in the quality and price required. UNICEF places a strategic focus on these supplies to shape healthy markets. UNICEF seeks to influence the market to achieve affordable prices, diversified supplier bases, competitive market landscapes, and quality products, fit for purpose, and in the right form for children.

UNICEF seeks to reduce the market barriers and constraints for existing and future products, as well as help develop new products to meet the programmatic needs of children, and build local level capacity to sustain development. Influencing markets requires an understanding of market forces, accurate forecasting, analysis, information transparency, engagement with industry, and a drive to achieve the best possible outcome for children.

Some of UNICEF's Key Market Information Resources

Market Notes



Key product and market information analysis

Market Dashboard



High-level analysis of 69 key supply markets

Price Database



Price transparency based on commercial terms

Supplier financing



Financing options and sources in support of SMEs

UNICEF Market Notes - Communication with public



Speaking now
Aadrian Sullivan
*Information Management/
 Communications Specialist*
UNICEF SD

Market notes & Manufacturer specific pricing

https://www.unicef.org/supply/index_54214.html

77 market notes published during 2014-2018 (Aug) covering 31 essential commodities/groups

Format: Notes take variety of forms

- Market & Supply Updates
- Product Specifications
- Information and Guidance

Aims

- To inform demand (e.g. COs, suppliers, partners)
- Provide market signals (to suppliers, product developers)

Content

- Programmatic context / background
- Product requirements / standards / specifications
- Market trends (demand / supply / pricing / availability)
- Market / product issues / challenges / deficiencies - to be addressed

Updated ~according to market dynamics / ideally 1x year / 1x 2 year – or 6 months as needed...

Cold Chain Equipment - Solar Direct Drive and Mains Powered Refrigerator Systems: Product Profiles, Availability, and Pricing - July 2018

This note provides updated supply and demand information on solar direct drive and mains powered cold chain refrigerators and freezers. From 2016, UNICEF initiated a procurement process for equipment services for secondary, tertiary, and quaternary, and on-site training in design and preventive maintenance.

Soap: Public/Private Vendor Supply & Demand Update - June 2018

This update provides information on肥皂 (public/private) vendor supply, demand, and pricing trends. It highlights pricing concerns of all leading vendors in the market, as well as overall demand (quarterly and annual) over the period 2016-2018. It also discusses the impact of the current program design.

Vitamin A Supplement: Market and Supply Update - June 2018

This update provides information for the period 2016-2018 on vitamin A supply. It highlights new developments in UNICEF's choice of suppliers, recent market supply interruptions, as well as price increases by global manufacturers.

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UNICEF Market Dashboard - High level analysis



Speaking now
Adrian Sullivan

*Information Management/
Communications Specialist*
UNICEF SD

- Market Dashboard: https://www.unicef.org/supply/index_70578.html
- Summarises UNICEF's market assessment of critical market determinants
- For 71 strategic lifesaving products
- Updated 2x a year

Category	Product	Availability	Quality	Regulatory / Administrative	Current	Next 4 years	Current Strategy / Intervention
Polio vaccines	Oral Polio Vaccine (OPV)	●	●	●	●	High	Working to increase manufacturer production capacity, will be focusing on OPV market transition by 2022. Encourage countries to increase GMP to increase flexibility. Working to improve programme forecast accuracy and financing.
	Inactivated Polio Vaccine (IPV)	●	●	●	●	High	Encouraging main manufacturer production capacity. Even though increasing, still below current needs. 30 booster countries not to receive IPV until the 2024. Working with suppliers, GMP, and countries to manage the transition.
	Polio Vaccine (Guinea-Bissau) (IPV)	●	●	●	●	Med	2023 supply critical and depends on donor for IPV. PG supplier not producing and others producing 1 million doses. UNICEF to clearly monitor the status of the market, and make a dialogue on next generation.
	Polio Vaccine (Guinea-Bissau) (IPV) (Vaccine)	●	●	●	●	Med	Sufficient supply of OPV for most countries needs, though requiring long-term. Availability of available vaccine increases will help supply for production of Pentavalent.
Traditional EPI vaccines	Diphtheria, Tetanus, and Pertussis (DTaP) Vaccine	●	●	●	●	Low	UNICEF to continue work on encouraging access to DTaP sufficient supply at reasonable price level.
	Diphtheria, Tetanus, and Pertussis (DTaP) Vaccine	●	●	●	●	Med	Working to encourage closer coordination with Myanmar, Russia, Ukraine (S&B) partners and countries to ensure vaccine availability. Increase forecast accuracy, as well as to expand supplier base.
	Diphtheria, Tetanus, and Pertussis (DTaP) Vaccine	●	●	●	●	Med	Encouraging closer coordination with Myanmar, Russia, Ukraine partners and countries to ensure next available forecast accuracy, and expand supplier base. Continue to work with GSK, S&B to encourage new market entry and reduce margin. Supply.
	Diphtheria, Tetanus, and Pertussis (DTaP) Vaccine	●	●	●	●	Med	Encouraging manufacturers to increase and make available and Low margin strain containing IPV. Production and forecast accuracy, and expand supplier base. Continue to work with GSK, S&B to encourage new market entry and reduce margin. Supply.
	Diphtheria, Tetanus, and Pertussis (DTaP) Vaccine	●	●	●	●	High	Country supply sufficient and stable, though to encourage country demand forecast accuracy and supply flexibility. Encourage governments to address regulatory barriers for additional administration and supply flexibility.
	Diphtheria, Tetanus, and Pertussis (DTaP) Vaccine	●	●	●	●	Low	Supply is sufficient to meet demand and prices reduced. To continue support for product innovation as well as cost forecast accuracy and quality market framework details and trade off.
New Vaccines	Tetanus Toxoid (TT) / Tetanus Toxoids (TT) Vaccine	●	●	●	●	Low	Overall supply availability is sufficient to meet short-term country demand, however supplier diversity and product forecast accuracy are areas to ensure healthy market framework details and trade off.
	Tetanus Toxoid (TT) / Tetanus Toxoids (TT) Vaccine	●	●	●	●	Med	Supply sufficient to meet current demand. New priority suppliers for all countries considering switch for multiple progressive formulation availability encouraged to advance production and active affordable prices for in coming countries.
	Tetanus Toxoid (TT) / Tetanus Toxoids (TT) Vaccine	●	●	●	●	Med	Supply sufficient for ongoing programmes, but severely constrained for new introductions in new countries with supply forecast accuracy and quality market framework details and trade off.
	Tetanus Toxoid (TT) / Tetanus Toxoids (TT) Vaccine	●	●	●	●	Med	Supply sufficient to meet current demand, but severely constrained for new introductions in new countries with supply forecast accuracy and quality market framework details and trade off.
Underfunded vaccines for maternal / high-risk population	Maternal and Neonatal Tetanus (MNT) Vaccine	●	●	●	●	Med	UNICEF is working for available vaccines to complete phase 3 trials, accelerated during 2018-2021. UNICEF current for use and trade off.
	Maternal and Neonatal Tetanus (MNT) Vaccine	●	●	●	●	Med	UNICEF is working for available vaccines to complete phase 3 trials, accelerated during 2018-2021. UNICEF current for use and trade off.
	Maternal and Neonatal Tetanus (MNT) Vaccine	●	●	●	●	Med	UNICEF is working for available vaccines to complete phase 3 trials, accelerated during 2018-2021. UNICEF current for use and trade off.

UNICEF Price Transparency - Historical data



Speaking now
Aadrian Sullivan

Information Management/
Communications Specialist
UNICEF SD

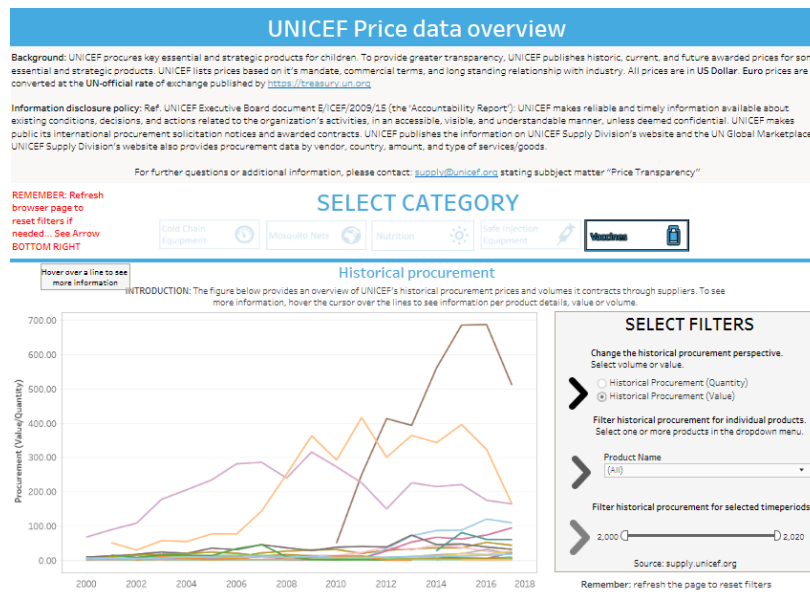
- Based on existing data
 - Can **expand** – as required
 - Database has **5 parts**
 - Currently **5 categories**

1. Category Selection

- 🖱️ **Must Select Category to proceed.**
- Cold Chain
- Bed nets
- Nutrition
- Safe Injection Equipment
- Vaccines
- ...More to be added...
- ...Revised annually...

2. Historical Procurement

- If not - **It shows all**
- Can select to see **US\$ value / Unit quantity**
- Select **products**, or specific sub-presentations
- Hover pop up details **product, unit, year**



UNICEF Price Transparency – Product-specific data



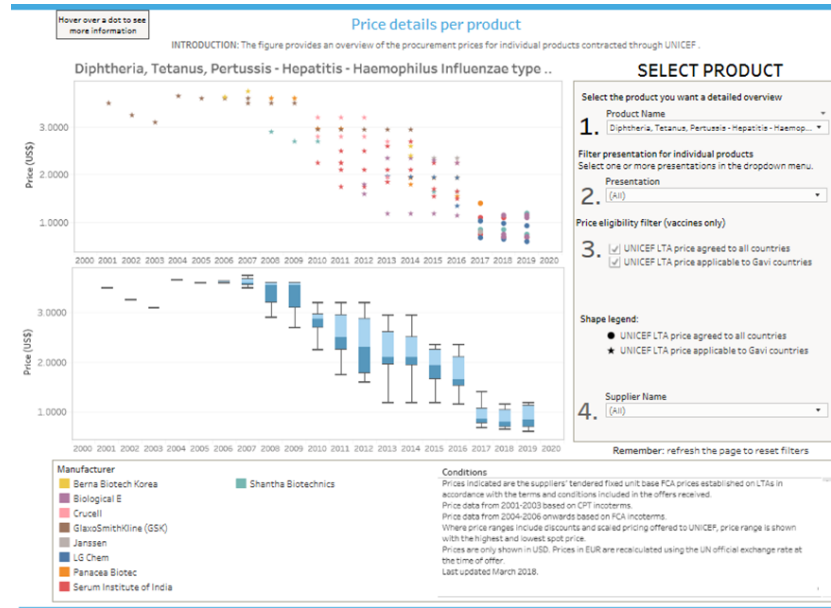
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*Information Management/
Communications Specialist*
UNICEF SD

3. Price Details

- **Must choose product to proceed.**
- Also can select **Presentation**
- Hover “pop up” shows **product, presentation, supplier, price, Gavi/LTA, year, specific terms**
- Price in **US\$**
- Select **Gavi or all countries (non-Gavi)**
- Select / compare **supplier/s** listed in legend.
- Shows **General Terms & Conditions**
- ...Pending – MIC pricing

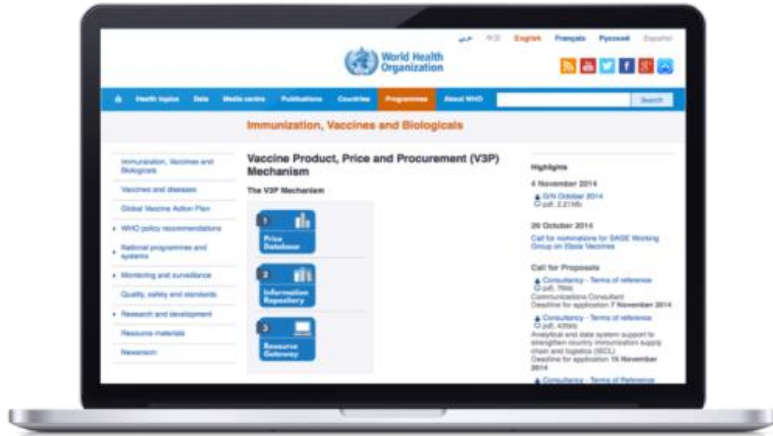
4. Price Trends - Box and Whisker

- Shows pricing details as **price range and trend.**
- Hover pop up details:
 - Maximum
 - Upper hinge
 - Median
 - Lower hinge
 - Minimum



WHO Vaccine Product Price and Procurement (V3P) Web Platform

V3P has been created to help countries gain access to up-to-date vaccine product, price, and procurement information.



It has **three main** components

- ✦ **Price database:** to compare prices across countries
- ✦ **Knowledge repository:** to get information about the V3P project and related articles, reports and analyses
- ✦ **Resource gateway:** to access the full range of online resources on vaccine products, prices, and procurement (incl. links to partners' websites)



Speaking now

Aadrian Sullivan

*Information Management/
Communications Specialist*

UNICEF SD

http://www.who.int/immunization/programmes_systems/procurement/v3p/platform/en/

MSF advocates for greater transparency and more affordable prices



THE RIGHT SHOT: BRINGING DOWN BARRIERS TO AFFORDABLE AND ADAPTED VACCINES

2nd Edition – January 2015

www.msfacecess.org



The Right Shot: Bringing down Barriers to Affordable and Adapted Vaccines 2nd edition, Jan 2015

- ✦ One of the most comprehensive publications on vaccine price information: 1,500 data points from 16 key vaccines across 13 countries
- ✦ Provides information on products available, schedules, adaptability etc.
- ✦ MSF is also advocating towards manufacturers for greater transparency on vaccines manufacturing costs, R&D costs and pricing strategies



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Adrian Sullivan

*Information Management/
Communications Specialist*

UNICEF SD

Access to Vaccines Index

Landscape analysis showing how vaccine companies are responding to calls to increase access to vaccines

<https://accesstovaccinesindex.org/>



Source: Access to Medicine Foundation



Speaking now

Aadrian Sullivan

Information Management/

Communications Specialist

UNICEF SD



Market Intelligence - Miscellaneous sources

- Public tenders
- Requests for Information (RFI)/Requests for Expression of Interest (REOI)
- (Joint) market surveys
- Industry consultations
- Information exchanges with peers (formal/informal)



Speaking now
Philipp Kalpaxis
Market Research Manager
UNICEF SD

Market Intelligence – Key messages

- Reducing the existing asymmetries of information in the vaccine market relies heavily on market participants' **willingness and ability to share market intelligence**. VPPN provides an ideal forum for such an exchange among peers.
- It is not sufficient to be able to collect and analyze market information. It is equally important to have the necessary **capacity to strategically use market intelligence** to optimize procurement decisions and to have the appropriate procurement system/framework in place to enable this.
- UNICEF is committed to continue publicly sharing relevant market intelligence and to expand the portfolio of market information offerings. We rely on VPPN members to **disseminate information** to the appropriate stakeholders and **provide feedback**.



Speaking now
Philipp Kalpaxis
Market Research Manager
UNICEF SD

Thank you

More information:

Market Intelligence e-discussion space on the VPPN

<http://www.vppnetwork.org/discussions/market.html>



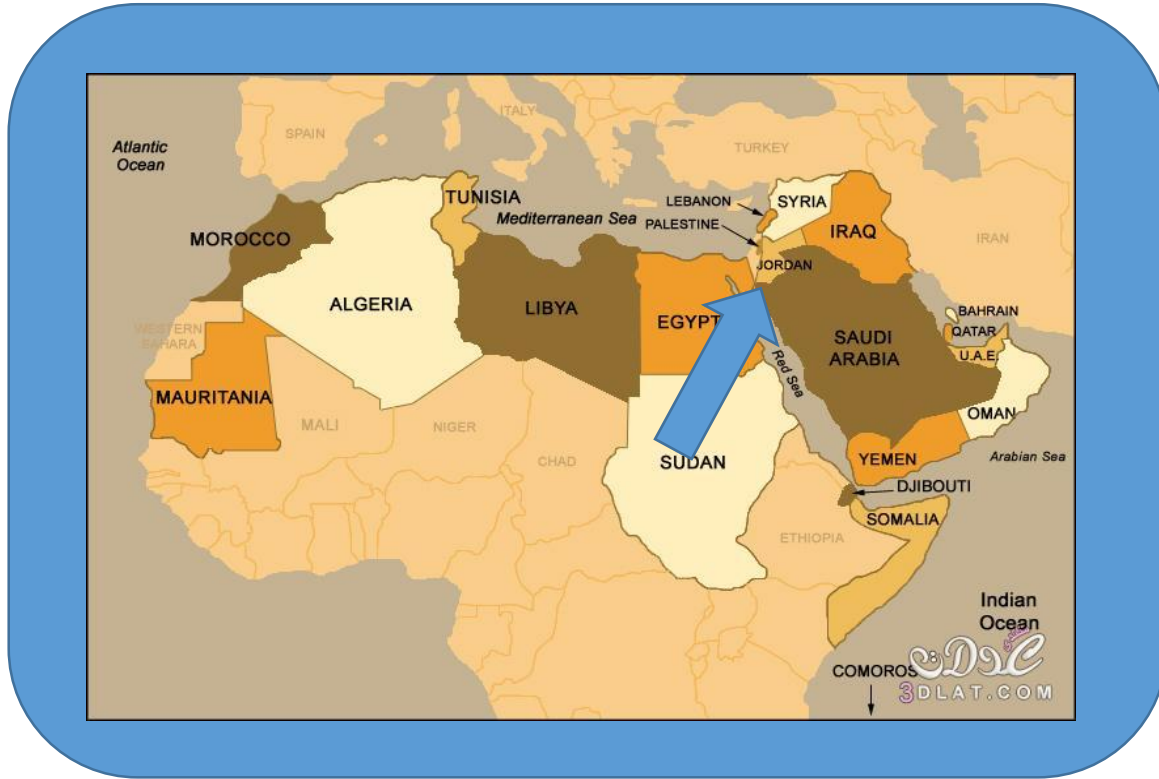
Speaking now

Philipp Kalpaxis

Market Research Manager

UNICEF SD

Presentation #2: Vaccine Market intelligence: Jordan's perspective



Speaking now

Heba Almohtaseb

*Vaccine procurement
Officer
Jordan*

Key market intelligence challenges in faced in Jordan

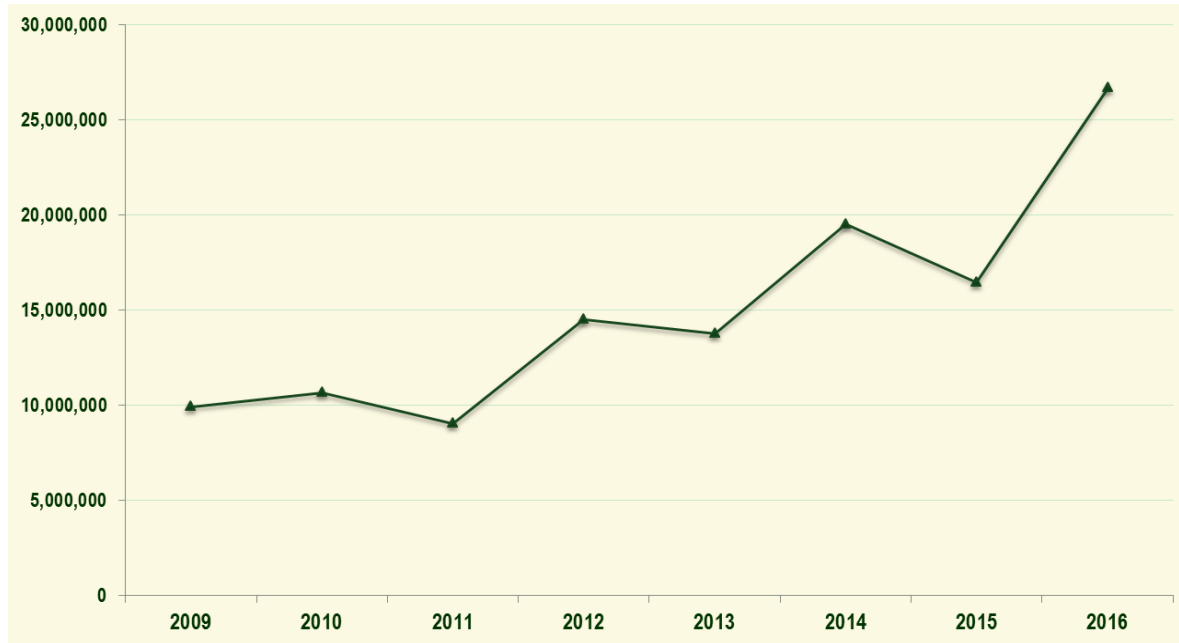
- Self procuring country through JPD/around 10 million population.
- JPD joint procurement department is a centralized purchasing body –all medicines for public health sector in the kingdom including vaccines for EPI national program.
- Yearly basis procurement.
- 20 million JDs are the allocated budget for vaccines in 2018.
- Key challenges:Restricted budget, The increasing prices for the vaccines ,Few no. bidders for some vaccines (problem in prices & award conditions).



*Speaking now
Heba Almohtaseb
Jordan*

Key market intelligence challenges in faced in Jordan

Financial value for JPD vaccines tender 2009-2016 in JDs



Solutions/best practices

1- Multi year tendering was the solution we decided to adopt to go over some of the challenges mentioned.

- Economics of large quantities for some EPI vaccines.
- Started this year by procuring for two years.
- We got savings in 2018 vaccines tender reaches about (2.8 millions JDs).

2- Increase the cooperation between R&D unit in JPD with the procurement unit (procurement officers) to move from just analysis of the data to apply market intelligence trend in purchasing & choose new strategies of procurement according to the results they get.



*Speaking now
Heba Almohtaseb
Jordan*

Thank you



Any further information, please contact me on heba.a@jpd.gov.jo



*Speaking now
Heba Almohtaseb
Jordan*

Questions? Comments?

The question and comments transcript will be posted in the Market Intelligence e-discussion space:

<http://www.vppnetwork.org/discussions/market.html>

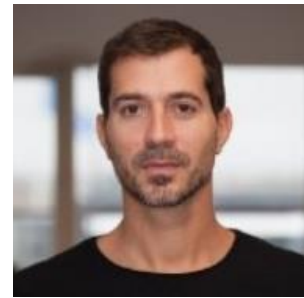


Moderator: Loic Sanchez
UNICEF Supply Division
Location: Copenhagen

Next steps

.....Join us as we continue the discussions on market intelligence on the VPPN website through to September 7, 2018.

<http://www.vppnetwork.org/discussions/market.html>



*Speaking now
Loic Sanchez,
Moderator*

THANK YOU

Upcoming activities:

2018 VIC and VPPEF
Oct 1-5, 2018