

PRESS RELEASE

African vaccine manufacturing capacity

Form/fill/finish capacity is strong while end-to-end local vaccine production will require additional investment.



New analysis illuminates strengths, gaps, opportunities, and recommendations for building a sustainable vaccine manufacturing ecosystem.

Key research findings:

- **If all plans to expand vaccine manufacturing in Africa are realized, capacity to form/fill/finish vaccines would more than double the projected African vaccine demand in 2030—a level of capacity that risks the sustainability and commercial viability of all manufacturing projects.**
- **Capacity to produce antigens locally is well below what would be needed to meet regional production targets—even when expansion plans are considered.**
- **Africa is highly reliant on technology transfers with non-African vaccine manufacturers to access the bulk supply of a given antigen and produce the final drug product. Yet, the majority of current and planned manufacturing capacity does not have technology transfers in place.**



- **Some African vaccine manufacturers already have access to financing but need to further develop their commercial capabilities.**

Addis Ababa, Ethiopia; Boston, MA, USA; Seattle, WA, USA, 03 October 2023 –The Africa Centres for Disease Control and Prevention (Africa CDC), the Clinton Health Access Initiative (CHAI), and PATH have released a new briefing paper, “Current and planned vaccine manufacturing in Africa,” following an assessment of vaccine manufacturing capacity in Africa.

African vaccine manufacturing is set to expand dramatically as the continent works to safeguard itself against future pandemics and disease outbreaks—and to ensure delays like the ones African nations faced in receiving COVID-19 vaccines never happen again. A clear picture of gaps and needs in the current vaccine manufacturing ecosystem is necessary to ensure all stakeholders are aligned moving forward and new projects and investments can succeed.

The assessment looked across the two critical steps needed in the vaccine manufacturing process: producing the active vaccine component, or antigen, which is the most cost-intensive and technically challenging step; and producing the final vaccine, which includes formulation, fill, and finish (form/fill/finish).

Research findings show that African vaccine manufacturing capacity is heavily concentrated on form/fill/finish, with a significant level of additional capacity still planned. If all plans are realized, capacity to form/fill/finish vaccines would more than double the projected African vaccine demand in 2030. At that level of capacity, there is a risk not every manufacturing project would be sustainable and commercially viable.

Conversely, capacity to produce antigens locally is very limited and well below the capacity that would be needed to meet regional production targets, even when capacity expansion plans are taken into consideration.

“Partnerships for African Vaccine Manufacturing (PAVM) was formed to strengthen the African vaccine manufacturing ecosystem and set Africa on the path to locally manufacture 60 percent of the continent’s routine immunization needs by 2040,” said Akhona Tshangela, PAVM Coordinator for the Africa CDC. “This work to map vaccine manufacturing capacity provides PAVM additional and essential clarity on how to coordinate action toward meeting that goal.”

The study noted that to accelerate use of the robust capacity for form/fill/finish, Africa is reliant on technology transfers from non-African vaccine manufacturers. But there are insufficient technology transfers in place to support the majority of current and planned vaccine manufacturing capacity.

Research also concluded that some African vaccine manufacturers already have strong financial capabilities (the means to access financing for the facilities and operations needed to produce vaccines) but need to further develop their commercial capabilities (establishing a strategic business case to produce those vaccines). Recommendations on ways that African vaccine manufacturers can improve their odds of success include focusing on vaccines that have strong market potential and strengthening business planning.

“This analysis offers critical insights for understanding how to move forward while preventing under- or over-investment,” said Simone Blayer, PhD, PATH’s Global Head of Chemistry, Manufacturing, and Controls, and Nonclinical Toxicology. “We hope these results will help



stakeholders and funders coordinate and collaborate on development efforts, interventions, and investments.”

“Investor and donor support is crucial to a healthy vaccine manufacturing ecosystem, but careful consideration should be given to how that investment fits into the whole,” said Frauke Uekermann, PhD, Director of Vaccines Markets at CHAI. “Ensuring stakeholders are aligned and investments strategically targeted will significantly improve manufacturers’ long-term odds of commercial sustainability.”

The Africa CDC, CHAI, and PATH are now working to act on the findings of the assessment. The Africa CDC is working with African Union Member States to support the procurement of African-made vaccines and prioritize activities that will help local vaccine manufacturers meet the PAVM 2040 goal. CHAI is working with key stakeholders to develop an integrated set of high-impact market-shaping interventions and support in their execution. And PATH is working with partners to develop a supply chain simulation that could help estimate the manufacturing site conditions—including types and size of future factories, workforce numbers, and types of expertise—needed to achieve the planned capacity.

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About the Africa Centres for Disease Control and Prevention

The Africa Centres for Disease Control and Prevention (Africa CDC) is a continental autonomous public health agency of the African Union which supports Member States in their efforts to strengthen health systems and improve surveillance, emergency response, prevention and control of diseases. Learn more at: <http://www.africacdc.org>

About the Clinton Health Access Initiative

The Clinton Health Access Initiative, Inc. (CHAI) is a global health organization committed to saving lives and reducing the burden of disease in low- and middle-income countries. We work with our partners to strengthen the capabilities of governments and the private sector to create and sustain high-quality health systems that can succeed without our assistance. Learn more at: <https://www.clintonhealthaccess.org/>

About PATH

PATH is a global nonprofit dedicated to achieving health equity. With more than 40 years of experience forging multisector partnerships, and with expertise in science, economics, technology, advocacy, and dozens of other specialties, PATH develops and scales up innovative solutions to the world’s most pressing health challenges. For more information, visit <https://www.path.org/>.