Sanofi

Index performance by Research Area

PERFORMANCE

Sanofi’s vaccine portfolio size, revenue, volume of doses sold, and geographic scope are among the largest of companies in scope. It markets the world’s first dengue vaccine (Dengvaxia®). Overall, the company’s performance in the Index is strong. It performs above average in Research & Development, with a relatively large pipeline. Sanofi’s performance is strong in all areas of Manufacturing & Supply. In Pricing & Registration, Sanofi is the leader in registration, with the majority of its relevant vaccines filed to be registered in 30-50% of countries in scope. It makes a general commitment to ensuring the prices of its vaccines are sustainable and equitable.

SALES AND OPERATIONS

Sanofi consists of five business units: vaccines; diabetes and cardiovascular; general medicines and emerging markets; specialty care; and animal health. For its entire portfolio, Sanofi has sales in 96 countries in scope. About one-third of all sales are made in emerging markets. Sanofi Pasteur is the vaccines division of Sanofi, and includes the company’s India-based affiliate Shantha Biotechnics. Sanofi Pasteur had a vaccines joint venture in Europe with Merck & Co., Inc. (Sanofi Pasteur MSD), which ceased operation at the end of 2016. The company will take its vaccine assets back in-house. It now has 38 marketed vaccines.

VACCINE PORTFOLIO

Sanofi has 38 vaccines on the market for 18 diseases in scope, one of the largest portfolios of the companies measured. Its portfolio covers a wide range, including many vaccines recommended by the WHO for routine immunisation (e.g., for diphtheria, hepatitis B, Hib, pertussis, polio and tetanus).

Vaccine sales in countries in scope
Vaccine sales in rest of the world
Other business segments

EUR 34,542 M
1,036 MN
3,707 MN
29,799 MN

Sales by segment 2015

MARKETED VACCINES

Cholera 1
Dengue 1
DT 1
DTPHibHep 1
DTPHibHepIPV 1
DTPHibIPV 3
DTIPV 1
MMR 1
Pneumococcal disease 1
JE 1
Measles 1
Tetanus 1
Typhoid 1
TyphoidHepA 1
Viral hepatitis 1
Polio 3
Yellow fever 2
Rabies 1
Seasonal influenza 5
Total 38

Number of doses sold in 2015

OPPORTUNITIES

Strengthen internal process for aligning supply and demand. Sanofi can consider implementing some or all of the key strategies identified by the Index to further strengthen its internal process for aligning supply and demand. For example, it can commit to taking steps to ensure access to vaccines where they are needed in the event of a shortage.

Define and publish a clear pricing strategy for vaccines. Sanofi can define what its pricing strategy is for governments that do not procure vaccines through UNICEF, and ensure it takes these countries’ ability to pay into account. It can also publish its pricing strategy for vaccines.

Strengthen approach to access provisions for late-stage vaccine candidates. Applying lessons learned from its dengue vaccine (Dengvaxia®), Sanofi can consider the value of all its late-stage vaccine candidates to countries in scope and, as appropriate, develop plans to facilitate access to them in such countries. For those projects with at least one access provision in place, Sanofi can continue to strengthen and refine its access commitments and strategies to ensure the vaccines are made rapidly accessible upon approval.
RESEARCH AREAS

RESEARCH & DEVELOPMENT

Proportionally low R&D investments. Sanofi invested USD 214.7 mn in vaccine R&D targeting diseases in scope in 2014 and 2015. As a portion of its global vaccine revenue, this is relatively low (2%) compared to other companies in scope, but comparatively high in absolute terms.

Relatively large vaccine pipeline. Sanofi has 14 R&D projects, targeting at least 15 diseases in scope. Five of these diseases have been prioritised by WHO for vaccine R&D.

Access provisions in place for over half of late-stage projects. Sanofi has the second-largest number of late-stage projects with at least one access provision in place (6/10 or 60%). For example, it plans to apply for WHO prequalification for its vaccine candidates for meningococci and rabies.

Researching Micropellet technology. Sanofi is developing technologies for vaccine delivery and packaging targeted at resource-limited settings, for example by exploring Micropellet technologies for the development of thermostable vaccines. It is also collaborating on vaccine technology development for developing countries through the Global Health Vaccine Center of Innovation.

PRICING & REGISTRATION

General pricing strategy. Sanofi makes a general commitment to ensuring the prices of its vaccines are sustainable and equitable. It applies a tiered pricing approach to countries that procure its inactivated polio vaccine (IPV) in a 10-dose vial through UNICEF. For its other vaccines procured through UNICEF, Sanofi complies with the Most Favoured Nation Clause, through which Sanofi agrees to give UNICEF the best terms it makes available to any other buyer. However, it is not clear how Sanofi prices vaccines for non-Gavi and non-PAHO countries that self-secure, or whether it takes these countries’ ability to pay into account.

Extension of Gavi prices to Gavi-transitioned countries. Sanofi commits to offering Gavi-level pricing in its UNICEF tender to Gavi-transitioned countries until the end of 2018. This applies to its yellow fever (Stamaril®) and pentavalent (Shan5®) vaccines.

Average transparency. Similar to peers, Sanofi does not systematically publish all prices for its vaccines in all countries in scope. Sanofi publicly discloses its pricing policy for one relevant marketed vaccine (its IPV, Imovax®), but does not disclose a general pricing strategy, unlike leaders in this area. Like most of its peers, it states that it does not include non-disclosure clauses on vaccine prices in its contracts with governments and other procurers.

Leader in registration filing. Sanofi files to register the majority of its relevant vaccines in 30-50% of the low-income countries (LICs) and lower-middle-income countries in scope. As the company has a large vaccine portfolio, this applies to a relatively large number of vaccines. Sanofi also commits to seeking WHO prequalification of eligible vaccines to expedite access in LICs.

MANUFACTURING & SUPPLY

Strong in aligning supply and demand. Sanofi demonstrates strong commitments and processes to align supply and demand, including clear processes for proactively engaging with purchasers. Internally, the company regularly reviews demand, has a clear process for escalating issues, and scales up production and/or reallocated stock when needed.

Leader in building manufacturing capacity. During the period of analysis, Sanofi had the highest number of vaccine manufacturing capacity building activities. It has undertaken long-term, manufacturing technology transfers in a range of countries in scope, including for several vaccines in Latin America.

Leader in addressing local logistics needs. Sanofi has presentations or packaging to help overcome local access challenges for approximately a quarter of its vaccines in scope. For example, to prevent waste, its inactivated polio vaccine (Imovax Polio®) can be used for 28 days once opened (if correctly refrigerated).