



Flu Vaccine Supply: The Critical Role of Distributors

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What is HIDA? Who Are Our Members?

- A trade association, founded in 1902, representing medical products distributors
- **200** Member companies operating **432 distribution centers** in the United States
- **HIDA Distributor Members Serve:**
 - 159,000 physician office accounts
 - 5,200 hospitals
 - 19,500 long-term care facilities
- **HIDA Distributor Member Profile**
Distributor Markets:
 - 60% serve physician offices
 - 40% serve hospitals
 - 30% serve long-term care facilities

Most members serve more than one market



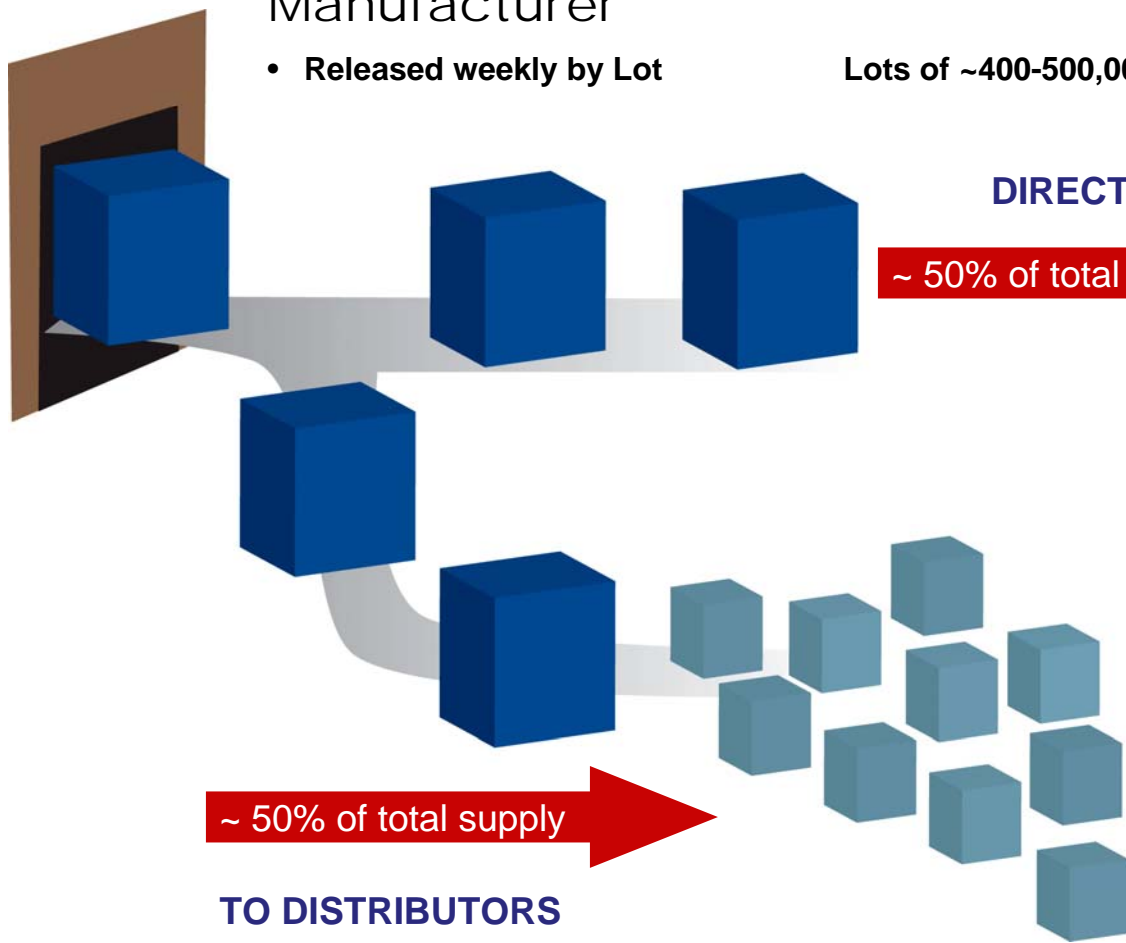
Flu Vaccine Distribution Overview

Two Ways Vaccine Gets to Market

Manufacturer

- Released weekly by Lot

Lots of ~400-500,000 doses



DIRECT

~ 50% of total supply

CUSTOMERS

- Pharmacies
- Hospitals
- Mass immunizers
- Public Health
- Retail outlets
- Physicians/Long term care

~ 50% of total supply

TO DISTRIBUTORS

- ~8 of 10 doses go to physician office or clinic
- Small average order size
- Shipped 1 to 3 days after receipt from manufacturer

~50-75,000 CUSTOMERS

- Doctors offices
- Clinics
- Other small providers
- Nursing homes

Who Are Vaccine Distributors?

Approx. 25 nationwide – many of which are also HIDA members, including:

Anda, Inc

Caligor Medical

Darby Drug Co., Inc.

DiaMed, Inc.

Dubin Medical

Edwards Medical Supply

General Injectables & Vaccines, Inc (GIV)

Henry Schein Medical

VaxServe, Inc

Insource, Inc

Lake Erie Medical, Surgical

McKesson Medical-Surgical

Medical Wholesale, Inc

MedSurg Supply, Inc

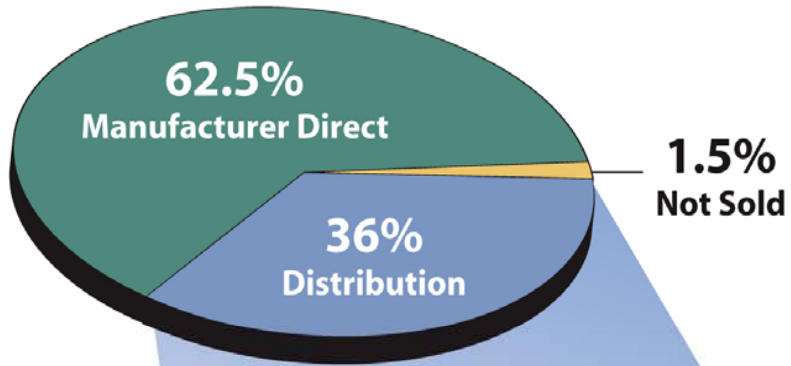
Moore Medical

Seacoast Medical

STAT Pharmaceuticals, Inc

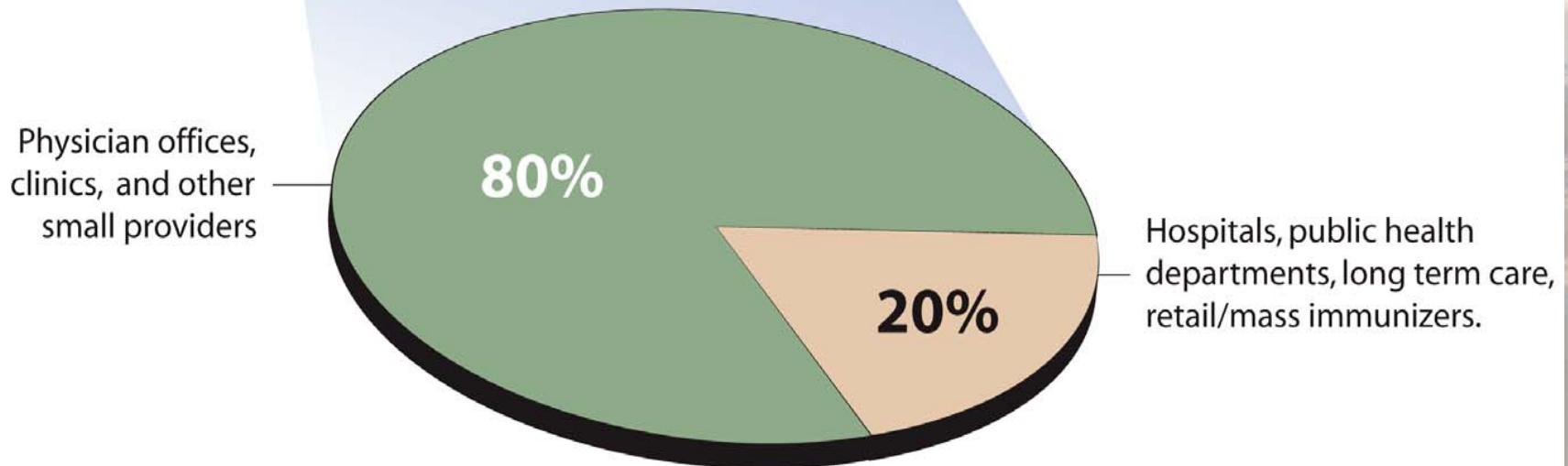
Cardinal Health, Inc.

2005-2006 Supply Breakdown

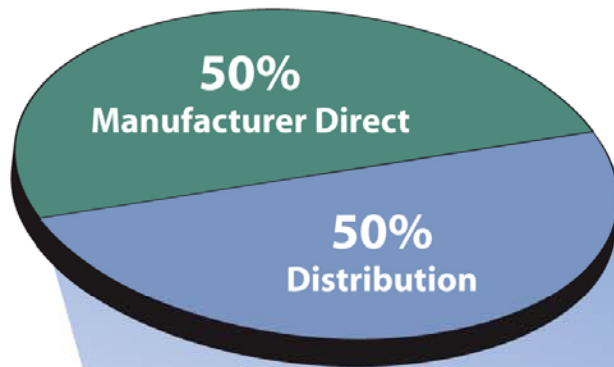


Source: 2005 CDC/AMA Flu Summit Presentations

Markets Served by Distributors (approx.)

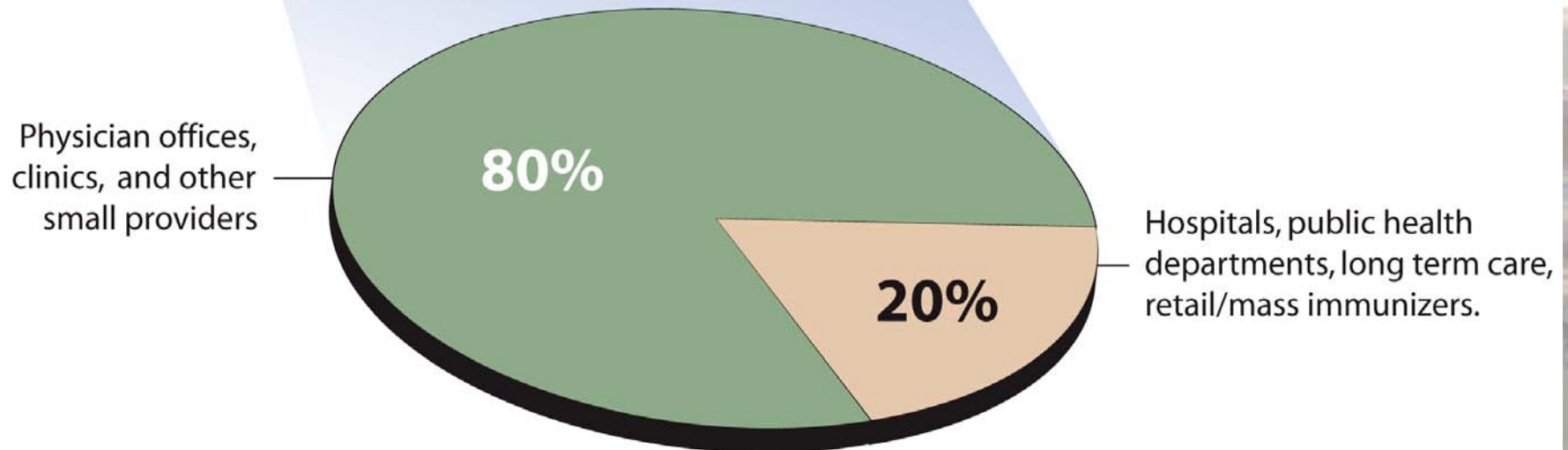


2006–2007 Supply Breakdown (approx.)



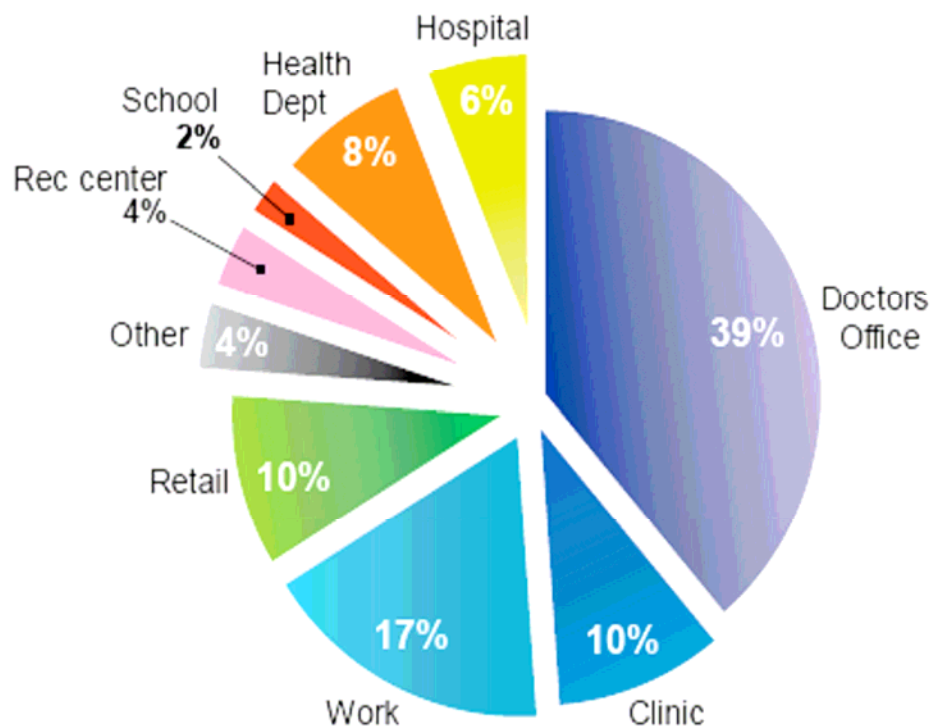
Source: CDC/HIDA 2006 Data

Markets Served by Distributors (approx.)



Supplying the Doctor's Office is Critical

5. In 2005-2006, more Americans got their flu shot from a physician's office than any other place.



- 39% at a doctor's office/HMO
- 17% at their place of employment
- 10% at a clinic or community health center
- 10% at a retail setting (grocery or drug store)
- 8% at a health department
- 6% at a hospital or emergency department
- 4% at a senior/recreation center
- 4% at a site classified as "other"
- 2% at a school

Source: Centers for Disease Control and Prevention -
Influenza Vaccine Supply Surveys 2005-06 (Gallup Results)

Observations

- Distributor companies are customers of the vaccine manufacturers. As soon as a distributor receives vaccine from the manufacturer, it is shipped to their customers – usually within 1-2 days
- Different types of vaccine providers receive their vaccine from different sources – some get their vaccine direct from the manufacturer, some receive vaccine from distributor companies
- Distributor companies overwhelmingly serve physician offices and serve relatively few retail outlets
- In lieu of a more modern and predictable manufacturing process, improved communication and education is needed to ensure public health goals are achieved. Currently, mixed signals seem to be fueling provider frustration