



The Critical Role of Distributors and Suppliers in the Vaccine Supply Chain

CDC/AMA Flu Summit Presentation - June 2009

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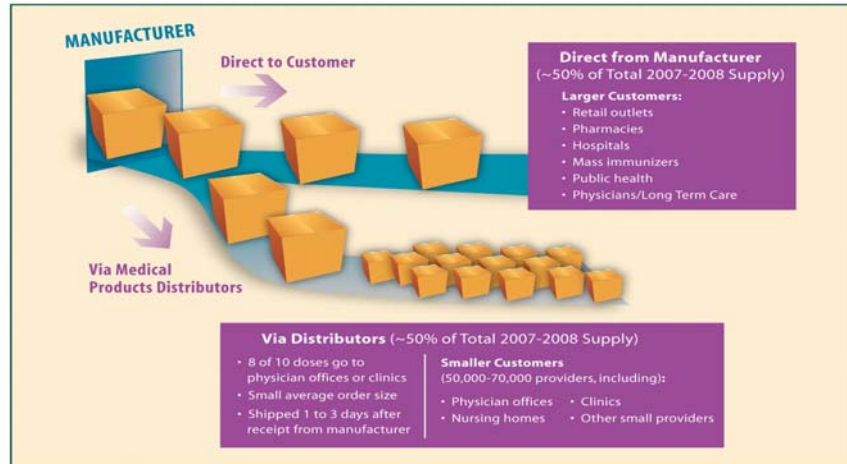


About HIDA

- The Health Industry Distributors Association (HIDA) is a Washington, D.C. - based professional trade association
- HIDA represents more than 160 medical products Distributor companies and approx. 150 medical products manufacturers through our Foundation, including the majority of flu vaccine Distributors, many vaccine producers, and the manufacturers of many ancillary vaccine products such as diagnostic tests and syringes
- We formed the Flu Vaccine Business Practices Initiative 3 years ago to help educate stakeholders on the role of our member companies and stress the importance of increasing vaccination rates.
- We have been actively involved in the Flu Summit since its inception



A Unique Supply Chain with Diverse Provider Customers



A Two-Pronged Channel

Figure 2: Percentage of Vaccine Sold by Channel in 2007-2008



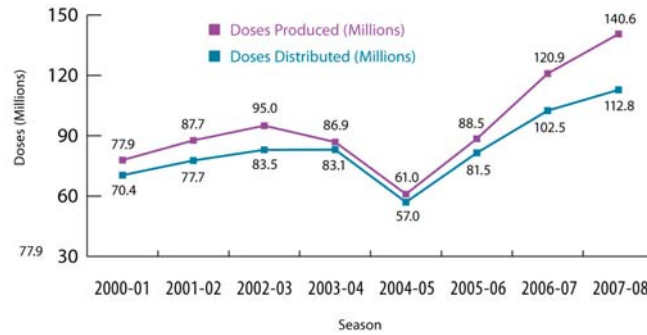
Source: HIDA research

Reprinted from HIDA's 2007-2008 Influenza Vaccine Production & Market Brief



A Continued Gap Between Supply and Demand

Figure 4: Influenza Vaccine Production for the U.S. Market, (2000-2001 through 2007-2008)



Sources: U.S. Centers for Disease Control and Prevention
Reprinted from HIDA's 2007-2008 Influenza Vaccine Production & Market Brief



The Importance of the Physician-Distributor Relationship

Figure 6: Sites for Flu Vaccination: Actual vs. Preferred

		18-49	50-64	65+
Doctor's office	Actual	46%	39%	45%
	Preferred	59%	46%	52%
Workplace	Actual	26%	18%	1%
	Preferred	25%	17%	0%
Clinic/community health center	Actual	4%	16%	18%
	Preferred	2%	13%	14%
Retail Store	Actual	10%	6%	11%
	Preferred	0%	2%	5%

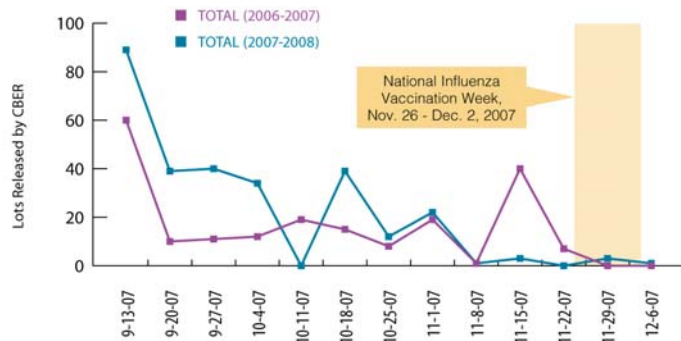
Source: Centers for Disease Control and Prevention/Gallup Organization, courtesy of the American Academy of Family Physicians (2005-2006)

Reprinted from HIDA's 2007-2008 Influenza Vaccine Production & Market Brief



The Challenges of an Unpredictable Supply

Figure 9: Weekly Releases, 2007-2008 Season



Sources: Food and Drug Administration, Center for Biologics Evaluation and Research

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Opportunities and Challenges for 2009-2010

Opportunities

- HIDA has strong commitments from its Distributor and Manufacturer member companies for this season
- We are poised and ready to help educate providers and stakeholders on a wide range of issues
- We have strong, valued relationships with many non-member partners: CDC/AMA, NFID, Immunization Action Coalition
- Flu is in the news and in the minds of more and more Americans

Challenges

- Closing the supply/demand gap – increasing vaccination rates
- H1N1
- Relative unpredictability of supply
- State and federal legislative activity



A Portal to All We're Doing

www.FluSupplyNews.com

www.hida.org



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