

# Pentavalent, IPV, Hexavalent

STRATEGIC DEMAND SCENARIOS (2026-2035)  
April 2026

*The forecast covers whole-cell pertussis containing vaccines only.*



# Context

- **November 2018:** Gavi Board approved in-principle support of hexavalent (DTwP-HepB-IPV-Hib)
- **June 2023:** Gavi Board confirmed opening a funding window based on conditions being met
- **July 2025:** First two Gavi-supported countries switched from pentavalent to hexavalent
- **Up to March 2026:** Several other Gavi-supported countries have applied to switch from pentavalent to hexavalent

# Scope and objectives of the Strategic Demand Scenarios (SDS)

## Scope

- **Gavi 73 countries**
- **2026-2035 period**
- **The DTwP-containing vaccines demand for the primary series** in the form of pentavalent and hexavalent;
- **The Inactivated Polio containing vaccines demand for routine programme:** in the form of IPV standalone and hexavalent.

## Objectives

- Improve the understanding of **demand dynamics for DTwP-containing and Inactivated Polio containing vaccines;**
- Provide ranges of the future demand for manufacturer's **visibility and improved long-term planning.**

# Two scenarios were defined based on materialisation of hexavalent switches

Scenario	Accelerated hexavalent transition ( <i>programmatic optimisation</i> )	Limited hexavalent transition
<b>Description</b>	<ul style="list-style-type: none"> <li>• Earlier and broader hexavalent switches driven by favorable pricing (at or close to parity with a course of pentavalent and IPV at 2026 weighted average prices) and strong country readiness</li> </ul>	<ul style="list-style-type: none"> <li>• Hexavalent switches aligned with understanding of country interest, current hexavalent prices, and Gavi recalibrated budget</li> </ul>
<b>Number of countries switching to hexavalent</b>	<ul style="list-style-type: none"> <li>• 41 countries by 2030</li> <li>• 7 additional countries by 2035</li> <li>• → <b>Total: 48 countries</b></li> </ul>	<ul style="list-style-type: none"> <li>• 25 countries by 2030</li> <li>• 6 additional countries by 2035</li> <li>• → <b>Total: 31 countries</b></li> </ul>

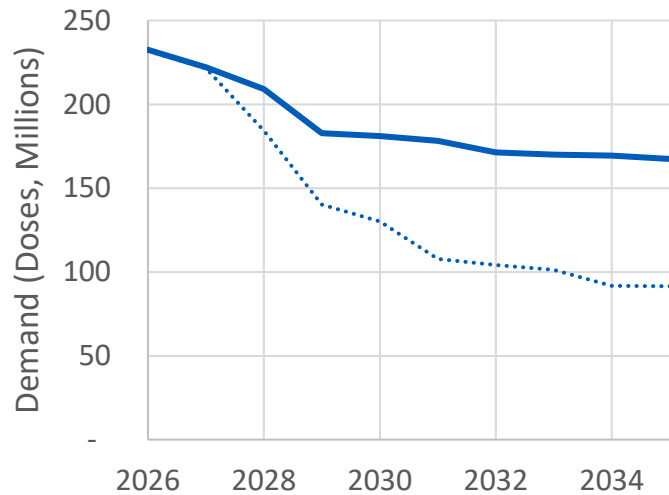
## Notes

- Assumptions regarding population growth, coverage and wastage rates are the same across the two scenarios.
- IPV2: all remaining introductions assumed to materialise by 2030, using IPV standalone or hexavalent.

# The pace and scope of hexavalent switches are the primary drivers of demand variability across the three markets

## Gavi73 SDS demand forecast by market

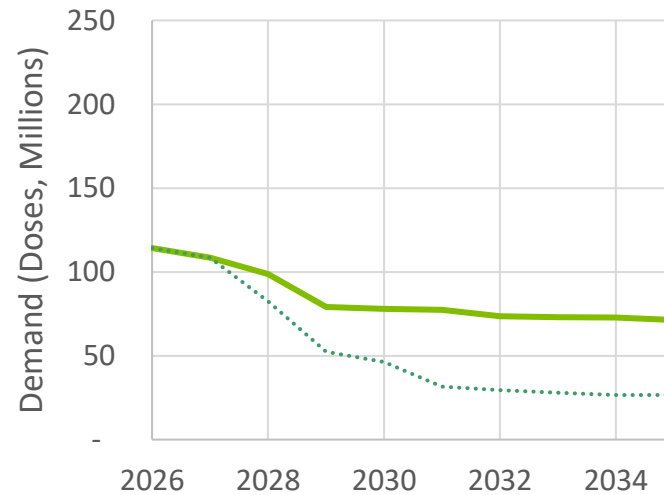
### Pentavalent



— Limited transition ..... Accelerated transition

	2026	2030	2035
Accelerated transition	232M	130M	91M
Limited transition	232M	180M	167M

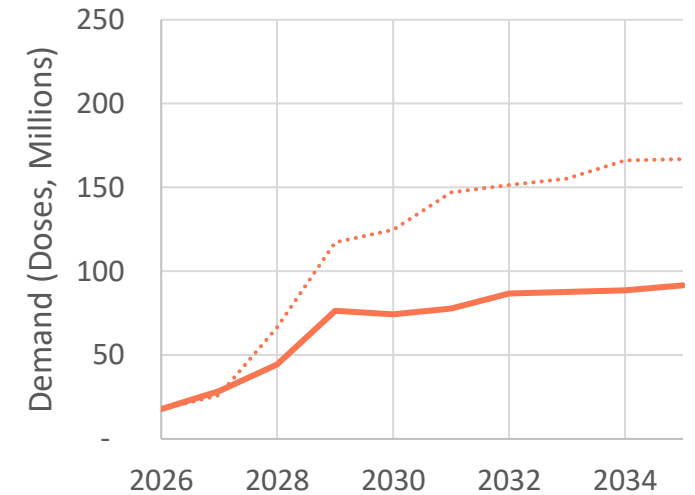
### IPV



— Limited transition ..... Accelerated transition

	2026	2030	2035
Accelerated transition	114M	46M	27M
Limited transition	114M	78M	71M

### Hexavalent

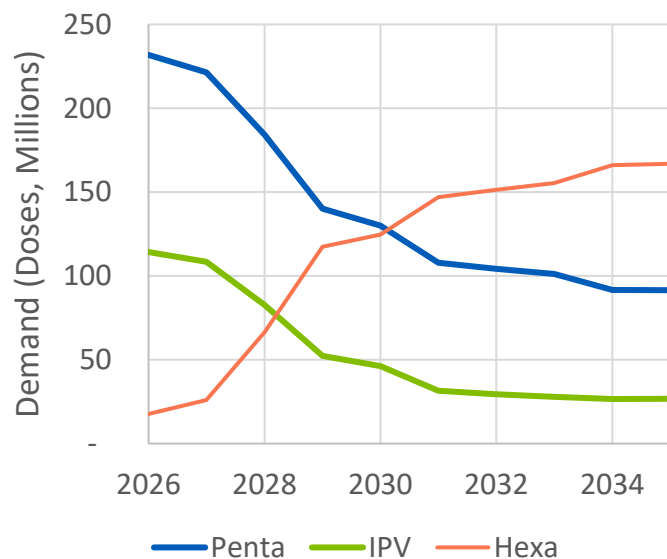


— Limited transition ..... Accelerated transition

	2026	2030	2035
Accelerated transition	18M	125M	167M
Limited transition	18M	74M	92M

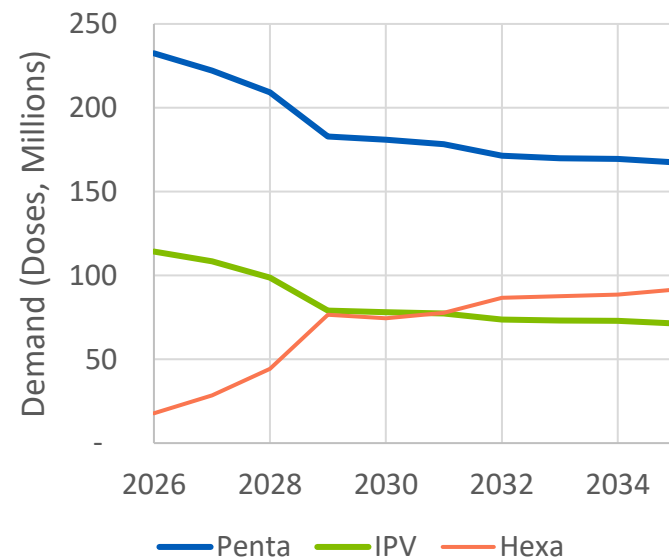
# Hexavalent price and country readiness will shape the pace and scope of switches across the three demand scenarios

## Accelerated Hexa Transition



	2026	2030	2035
<b>Pentavalent</b>	232M	130M	91M
<b>IPV</b>	114M	46M	27M
<b>Hexavalent</b>	18M	125M	167M

## Limited Hexa Transition



	2026	2030	2035
<b>Pentavalent</b>	232M	180M	167M
<b>IPV</b>	114M	78M	71M
<b>Hexavalent</b>	18M	74M	92M

# Appendix

# Yearly demand forecast, in million doses (scope: Gavi 73)

## Pentavalent

Scenario	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035
Accelerated hexavalent transition	232	221	184	140	130	108	104	101	92	91
Limited hexavalent transition	232	221	209	182	180	178	171	169	169	167

## IPV

Scenario	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035
Accelerated hexavalent transition	114	108	83	52	46	32	29	28	27	27
Limited hexavalent transition	114	108	99	79	78	77	74	73	73	71

## Hexavalent

Scenario	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035
Accelerated hexavalent transition	18	26	66	117	125	147	151	155	166	167
Limited hexavalent transition	18	26	42	75	74	78	87	88	89	92

# Yearly demand forecast, in million doses (scope: Gavi 56)

## Pentavalent

Scenario	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035
Accelerated hexavalent transition	156	146	109	66	56	34	31	28	19	19
Limited hexavalent transition	156	146	134	108	106	104	97	96	96	94

## IPV

Scenario	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035
Accelerated hexavalent transition	100	94	68	38	32	17	15	14	12	12
Limited hexavalent transition	100	94	84	65	64	63	59	59	59	57

## Hexavalent

Scenario	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035
Accelerated hexavalent transition	2	13	54	105	112	134	139	143	153	154
Limited hexavalent transition	2	13	29	62	61	65	74	75	76	79