

World Health Assembly side-event, 20 May 2026, Geneva

Regional production in action: Aligning access and affordability to advance health equity

Summary of the roundtable discussion (Chatham House Rules)

The roundtable brought together representatives from international organizations, regional institutions, financing bodies, research organizations, manufacturing initiatives and civil society to discuss how regional production initiatives can better contribute to equitable access to health products and strengthen health systems.

Participants acknowledged that regional production has evolved from being viewed primarily as an industrial development agenda or a pandemic preparedness measure into a broader public health strategy linked to health security, resilience, sovereignty, affordability and sustainable access. While substantial political momentum and investments have emerged in recent years, participants emphasized that success will ultimately depend on whether manufacturing initiatives are embedded within broader health and innovation ecosystems that prioritize public health needs and create sustainable access to health products.

“Access is not an initiative – it’s life.”

Moving from manufacturing facilities to health manufacturing ecosystems

A recurring theme throughout the discussion was that regional production should not be understood as the establishment of manufacturing facilities alone. Sustainable production requires the development of integrated ecosystems that connect research and development (R&D), technology transfer, intellectual property (IP) management, financing, procurement, regulation, workforce development, supply chains and market creation.

Participants emphasized that local manufacturing should be viewed at national, regional and continental levels. National self-sufficiency is unrealistic and undesirable; instead, sustainable manufacturing depends on regional specialization and cross-border coordination. The term “regional production” is preferred over “local manufacturing” as it better captures the need of value-chain-wide collaboration across countries. “Geographic diversification of production” further highlights global complementarity in production, supply chains and skills development.

Several participants noted that despite growing investments in manufacturing infrastructures, ecosystem development remains uneven. Investments continue to focus heavily on production capacity, while comparatively limited attention is given to innovation systems, institutional capacity, supply chains and long-term market development. This imbalance risks creating manufacturing capacity without the conditions necessary for access and sustainability.

Examples from established innovation hubs globally, such as the mRNA Hubs and Science-Parks, were cited to illustrate the importance of close collaboration between universities, research institutes, regulators, manufacturers and financing institutions. Participants emphasized that building similar ecosystem-based approaches will be critical for strengthening local ownership of innovation and technology.

“We need to address demands of four key stakeholders, each of whom has different motivations: manufacturers are driven by profitability and shareholder returns, governments prioritize public goods and locally manufactured products for resilience, people seek rapid

access to quality products, and global public health stakeholders are likewise focused on advancing the common goods.”

Building public health innovation and institutional capacity

Participants highlighted the importance of strengthening local innovation ecosystems and institutional capacity. Investments in R&D, education, scientific infrastructure and research collaboration were viewed as essential for long-term sustainability.

“We need to stand strong on the public health agenda. It’s a commercial discussion obviously. But at the end of the day, it’s about people lives.”

Several participants pointed to examples from established innovation hubs globally, where universities, research institutes, industry, financing systems and regulators operate in close coordination. Similar ecosystem-based approaches were seen as necessary to support regional innovation capacity elsewhere. A participant raised the need for an “institutional engineering approach” building sustainable institutions from the ground up, rather than relying on short-term programmes or fragmented initiatives. This includes strengthening research centres, regulatory agencies, universities, procurement systems and manufacturing ecosystems.

Community engagement and grassroots ownership were also identified as critical dimensions of sustainability. Some participants argued that discussions on access and manufacturing remain too concentrated in international policy spaces and insufficiently connected to affected populations and local communities. We must ensure that African experts and leaders support the process, as well as the ethical and regulatory framework.

Ensuring access and affordability through sustainable markets

Participants repeatedly highlighted that access and affordability must remain the primary objectives of regional production initiatives. Manufacturing expansion alone does not guarantee improved access if products remain unaffordable, unavailable or disconnected from public health priorities. Participants also emphasized the growing role of inter-agency collaboration, while stressing the need for stronger policy coherence and coordination across health, industry, finance, science, research and trade sectors.

A major challenge identified was the absence of predictable and sustainable markets for local manufacturers. While considerable resources have been invested in expanding production capacity, fragmented procurement systems and uncertain demand continue to threaten the viability of manufacturers.

Many participants argued that regional and continental pooled procurement mechanisms offer one of the most promising solutions. By aggregating demand, improving market visibility and creating larger and more predictable purchasing volumes, pooled procurement could simultaneously improve affordability, strengthen market sustainability and support local manufacturing.

Participants also stressed the need to better align production priorities with public health needs and disease burdens. This includes not only vaccines and pandemic-related products but also diagnostics, medical countermeasures, medicines for noncommunicable diseases and other priority health products. Several participants emphasized the importance of translating disease burden into effective demand signals that can guide investment decisions and manufacturing priorities.

The discussion further highlighted the difficulty of transitioning from donor-driven procurement systems toward sustainable market models. In many settings, health products markets have historically relied on donations and externally funded procurement mechanisms, making it challenging to establish commercially

viable manufacturing while maintaining equitable access. Participants therefore called for business models that balance commercial sustainability with public health objectives. National governments will need to change their mindset and be willing to pay for health products that were previously free.

Strengthening local ownership through innovation, technology transfer and IP management

Participants agreed that meaningful local ownership requires more than the transfer of production processes. Technology transfer should enable countries and manufacturers to acquire the knowledge, capabilities and institutional capacity needed to adapt, improve, reproduce and innovate technologies over time.

Several participants noted that technology transfer initiatives often focus on operational production capacity while insufficiently addressing technological learning and long-term innovation capabilities. Successful technology transfer should therefore be linked to investments in research institutions, universities, workforce development and innovation systems.

Participants also emphasized the need to incorporate access considerations from the outset of partnerships and investment agreements. Access provisions, IP arrangements, regulatory pathways and public health objectives should be embedded early in negotiations rather than addressed after products reach the market.

The discussion highlighted ongoing challenges related to IP frameworks and the uneven capacity of countries to use available flexibilities. Participants stressed the importance of aligning national legislation with available international flexibilities and ensuring that countries retain sufficient policy space to support technological learning and local production. Particular concern was raised about countries graduating from least-developed country status and potentially losing important flexibilities that have supported domestic manufacturing efforts. National laws will need to be adapted to include flexible IP provisions and adoption of TRIPS flexibilities.

“Life cycle management requires a holistic approach. IP management must be considered from the outset, with a clear legal framework in place to enable production.”

Addressing critical ecosystem bottlenecks

Participants identified several persistent bottlenecks that continue to limit the effectiveness and sustainability of regional production initiatives.

One major challenge is the limited production of active pharmaceutical ingredients (APIs), which remains highly concentrated globally and is almost inexistent in many regions, including Africa. This dependence creates vulnerabilities across supply chains and undermines manufacturing resilience. Participants called for targeted investments in API production as a strategic priority.

A second challenge concerns institutional capacity. Participants emphasized the importance of building durable institutions rather than short-term programmes. Regulatory authorities, research centres, universities, procurement agencies and financing institutions all require sustained support if manufacturing ecosystems are to become self-sustaining.

A third challenge relates to financing. While significant resources exist within the global health architecture, participants questioned whether these resources are reaching local manufacturers, research institutions and civil society organizations effectively. Concerns were raised about fragmentation, intermediary structures and financing arrangements that do not sufficiently support local ownership and long-term capacity development.

"We need an 'institutional engineering approach' building sustainable institutions from the ground up, rather than relying on short-term programmes or fragmented initiatives."

Financial capture and need for alternative business models

Despite substantial investments in manufacturing capacity, participants warned that systems fragmentation and limited market visibility continue to threaten the viability of local producers.

"Distributor lobbying reflects fragmentation by design. We need to understand who is benefiting, who is lobbying, who captures the market, and which actors are ultimately driving these dynamics."

Finally, participants highlighted market failures affecting products with high public health value but limited commercial attractiveness, including antimicrobial resistance and neglected diseases. These examples reinforced calls for alternative financing and business models that better align market incentives with public health priorities.

Priorities for collective action

The discussion concluded with broad agreement that regional production can only succeed if access and affordability are kept at the centre of policy design and implementation, with international, regional and local actors working hand in hand.

Participants identified several priority actions for governments, regional institutions, international partners and manufacturers:

- Strengthen regional cooperation, pooled procurement mechanisms and market-shaping initiatives to create predictable demand and improve affordability.
- Align manufacturing investments with public health priorities and disease burdens to ensure that production contributes directly to improved access.
- Invest in R&D, education, innovation systems and institutional capacity to strengthen local ownership of knowledge and technology.
- Expand technology transfer initiatives that promote technological learning, innovation capacity and long-term independence.
- Embed access provisions, IP considerations and regulatory pathways into partnership agreements from the outset.
- Strengthen regulatory harmonization, quality assurance systems and cross-border collaboration.
- Support the development of API production and resilient regional supply chains.
- Expand innovative financing mechanisms, including concessional financing and long-term industrial investment approaches.
- Improve policy coherence across health, industry, trade, science, research and finance sectors.
- Ensure that communities and affected populations are more directly engaged in shaping manufacturing and access strategies.

Participants concluded that the transition from political commitment to implementation will require long-term partnerships, coordinated action and sustained investment. No single institution can deliver this agenda alone. Progress will depend on collective efforts to build manufacturing ecosystems that place public health, access and affordability at their core.

"No one agency can make the agenda move alone. We will success or fail together. But are we ready to be together?"