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EXECUTIVE SUMMARY

The East Africa Pharma & Biotech Conference (EAPB) convenes leading policymakers, industry stakeholders, development partners, and scientific experts committed to advancing regional manufacturing capacity for health products. The 2025 edition focused on aligning investment, regulatory harmonization, supply chain resilience, and innovation ecosystems to accelerate self-reliance in essential medicines, diagnostics, and vaccines.

This year's program brought together more than 150 participants from across Africa, global institutions, financing bodies, academia, and technology partners. Discussions emphasized actionable pathways to strengthen local production through improved market shaping, streamlined procurement, aggregated demand, human capital development, and sustainable financing models.

The conference highlighted practical narratives from manufacturers, insights from global health policymakers, and forward-looking strategies for value chain development. By convening cross-sector leadership, EAPB continues to shape the region's trajectory toward a competitive and resilient pharmaceutical and biotech manufacturing landscape.

CONTEXT

The East Africa Pharma & Biotech Conference (EAPB) 2025 convened policymakers, regulators, manufacturers, development partners, financiers, and technical experts to advance a shared objective: strengthening Africa's regional manufacturing capacity for medicines, diagnostics, vaccines, and health technologies.

Against a backdrop of global supply chain fragility, rising disease burden, and increasing geopolitical uncertainty, EAPB 2025 focused on translating continental ambition into implementable pathways. Discussions centered on aligning regulatory reform, market shaping, financing instruments, workforce development, and technology partnerships to accelerate Africa's transition from import dependence toward sustainable, competitive local manufacturing.

Co-hosted with the Global Health Supply Chain Summit (GHSCS), the conference emphasized an end-to-end value chain perspective, linking manufacturing with procurement, logistics, regulation, financing, and health system delivery.

KEY INSIGHTS

Opening Remarks: Setting the Vision for Regional Manufacturing & Health Security

Session Summary

The opening session established EAPB 2025 as a strategic convening platform for advancing Africa's pharmaceutical and biotech manufacturing agenda. Speakers emphasized the urgency of transitioning from import dependence to regional self-reliance, driven by supply chain shocks, rising demand, and geopolitical risks. Rwanda's leadership through regulatory strengthening, ecosystem investments, and regional positioning was highlighted alongside strong EU backing, including flagship investments such as the BioNTech mRNA facility. Regulatory maturity and regional market integration were framed as foundational enablers of sustainable manufacturing growth.

Key Takeaways

- Regional manufacturing is a strategic necessity for Africa's health security, not a policy option.
- EAPB serves as a continental platform aligning government, industry, and development partners.
- Rwanda is positioning itself as a regional manufacturing and regulatory hub.
- EU support is long-term and ecosystem-oriented, combining finance, talent, and regulatory strengthening.
- Regulatory leadership (WHO ML3 → ML4) is central to attracting investment and enabling scale.
- AfCFTA and regional market integration are critical to industrial competitiveness.

Plenary Panel: Regional Manufacturing of Pharma & Health Products in Africa

Session Summary

This plenary examined Africa's progress and remaining gaps in building sustainable regional manufacturing capacity. Regulators, DFIs, and industry leaders discussed how regulatory harmonization, blended finance, technology partnerships, and market aggregation can unlock scale. Early industry movers shared practical challenges in nascent ecosystems, while financiers highlighted the need for tailored investment models. The panel also explored Africa's long-term transition from manufacturing for domestic markets to competing globally.

Key Takeaways

- Strengthened regulatory systems directly catalyze private investment and advanced manufacturing.
- Regulatory harmonization (AMA, mutual recognition) is essential to reduce fragmentation.
- Blended finance is critical to support early-stage and complex manufacturing ventures.
- Industry faces persistent challenges: skills gaps, market fragmentation, and tech transfer pathways.
- Market aggregation and predictable procurement are prerequisites for scaling complex products.
- Manufacturing capability is the foundation for future R&D and innovation ecosystems.

Session 2: Shaping the Next Generation of Human Resources

Session Summary

This session focused on human capital as the core enabler of Africa's manufacturing ambitions. Speakers highlighted workforce gaps across production, quality, regulatory, and R&D roles and showcased applied skilling, incubation, and regional training models emerging in East Africa. The discussion emphasized integrating education, industry exposure, and entrepreneurship to create an industry-ready talent pipeline, while calling for policy reforms to support flexible and innovative training frameworks.

Key Takeaways

- Workforce readiness is the most critical constraint to manufacturing scale-up.
- Applied, hands-on training is more impactful than purely academic models.
- Integrated platforms linking training, research, and incubation accelerate talent development.
- Regional centers of excellence enable alignment between skills supply and industry demand.
- Policy and regulatory flexibility is needed to support new learning and accreditation models.
- Entrepreneurship pathways are essential to translate skills into innovation and enterprise growth.

Session 3: Cross-Stakeholder Round Table: Nurturing a Sustainable Pharma & Biotech Value Chain in Africa

Session Summary

This high-level round table brought together government, industry, financiers, regulators, and global health partners to assess what is still needed to de-risk manufacturing in Africa. While progress has been made through regulation, finance, and partnerships, participants acknowledged

persistent structural barriers. The discussion focused on coordinated financing, quality systems, technology access, shared infrastructure, and the role of government as an ecosystem catalyst.

Key Takeaways

- Sustainable manufacturing requires coordinated action across stakeholders.
- Blended and sequenced financing is essential to address long gestation periods.
- GMP, regulatory readiness, and WHO PQ are gateways to global markets.
- Technology transfer and IP-enabled partnerships accelerate capability building.
- Capacity-building efforts must be better coordinated and industry-aligned.
- Government incentives and shared infrastructure play a key role in de-risking investment.
- Demand predictability remains the single most critical missing link

Session 4: Made-in-Africa Diagnostics: Building Regional Value Chains That Scale

Session Summary

This session examined diagnostics as a near-term opportunity for regional manufacturing. Industry players highlighted persistent bottlenecks—input dependency, working capital constraints, quality certification, and regulatory complexity—while also showcasing emerging solutions such as co-manufacturing, local input substitution, and after-sales service models. Demand aggregation, procurement reform, and regulatory harmonization were identified as decisive levers for scale.

Key Takeaways

- Diagnostics manufacturing is one of Africa's most scalable near-term opportunities.
- Heavy reliance on imported inputs remains a major vulnerability.
- Working capital constraints and tender structures limit SME competitiveness.
- Quality systems and regulatory pathways are critical cost and time drivers.
- Co-manufacturing and technology transfer can accelerate ecosystem maturity.
- Predictable demand, framework contracts, and pooled procurement enable scale.
- Regulatory harmonization and mutual recognition could dramatically reduce time-to-market.

CLOSING NOTE

EAPB 2025 reinforced that Africa's pharmaceutical, biotech, and diagnostics transformation is no longer hypothetical. With coordinated action across regulation, financing, market creation, and skills, the continent has a credible pathway to build resilient, competitive health product value chains that support both health security and economic growth.