

CAPITOL STREET

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Polio Vaccine Unlikely to Be Pulled by FDA

HHS Secretary Nominee RFK Jr Critics Flood the Press

Relevant Companies



»» Our Take & Next Up

We do not believe that the polio vaccine will be pulled from the market. Headlines [today](#) are not accidental, in our view. Those trying to sink RFK Jr as HHS Secretary ([here](#)) are likely planting seeds for stories to impact the Senate vote. Several academics and notable scientists have also publicly opposed his nomination as well ([here](#)). Recall HHS Secretary, as other nominees, only require 51 votes. Due to the slim Senate majority, RFK can only afford to have 3 Republicans opposing him with J.D. Vance's tie-breaking vote. If RFK Jr. incurs a significant opposition, there is time for President Trump to select another candidate prior to nomination votes next year.

»» Key Points

We do not believe the polio vaccine will be pulled. Recall that Mitch McConnell, a key Senate Republican, suffered from polio. We note RFK Jr. stated that he would not remove specific vaccines from the market and would instead seek to promote "informed choice". If the Senate GOP loses 4 members, RFK Jr's nomination will fall (despite J.D. Vance's tie-breaking vote).

One thing we could see is the EUA status pulled for existing COVID vaccines. This can be done quickly and easily. Several pediatric COVID vaccines (MRNA, PFE, and NVAX) and updated vaccine boosters (NVAX, PFE, and MRNA) are authorized for emergency use. 2 COVID vaccines are fully approved by the FDA: Comirnaty (PFE) and Spikevax (MRNA).

Clinical trials for vaccines will also likely be under increased scrutiny under RFK Jr. RFK Jr. has spoken at length about the need to return to "gold standard, evidence-based science" and to collect additional evidence on vaccine safety. As a reminder, vaccines are tested through randomized controlled trials and through observational studies under real-world conditions. His concerns with vaccines echo his other healthcare views on anti-establishment/anti-industry and anti-additive views in food and water. We may see additional data required from manufacturers to justify nonactive ingredients and [preservatives](#) in vaccines.

Who is in the running as back up HHS Secretary (if needed)? We do not know for sure who will be picked but we note the following names in the (potential) running should RFK Jr's nomination be at-risk. We note that

the Senate wants to handle nominations ASAP in 2025, so they can commence the all-important Reconciliation bill to extend Tax provisions, impacting healthcare, immigration and climate.

- **Ben Carson** – Dr. Ben Carson is a neurosurgeon, author, and former U.S. Secretary of Housing and Urban Development (HUD). He is known for his medical career and subsequent political involvement.
- **Bobby Jindal** – Bobby Jindal is considered a more levelheaded, mainstream candidate. He is the former Louisiana Governor, currently serving as the Chair of the Center for a Healthy America at AFPI. He is anti-PBM, pro-price transparency, and aligns with Trump on limiting the ACA. He was assistant secretary of HHS under former President George W. Bush, and he was executive director of the National Bipartisan Commission on the Future of Medicare.
- **Joseph Ladapo** – Dr. Joseph Ladapo is the current Florida Surgeon General. He is a physician and University of Florida professor whose research is focused on reducing cardiovascular risk in disadvantaged populations, which aligns with the chronic disease priorities of Trump. Like RFK Jr., he has publicly resisted public health recommendations and strongly shares RFK's vaccine skepticism. He is strongly against vaccine mandates.

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