

Global Influenza Vaccine Market: Analysis by Valency (Quadrivalent & Trivalent), By Vaccine Type (Inactivated And Live Attenuated), By Technology (Egg-based & Cell-based), By Age Group (Adult & Pediatric), By Route Of Administration (Injection & Nasal Spray), By Distribution Channel (Hospitals And Pharmacy, Government And Institutions And Others), By Region Size And Trends With Impact Of COVID-19 And Forecast Up To 2028

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Abstracts

The influenza vaccine, often referred to as the flu vaccine, is a critical tool in the field of preventive medicine aimed at reducing the spread and impact of influenza, a contagious respiratory illness caused by influenza viruses. One of the reasons leading to the rising demand for influenza vaccine in recent years is the increased awareness of the importance of vaccination in preventing contagious respiratory illnesses, especially in the wake of global pandemic like COVID-19, which has highlighted the significance of vaccination in public health. Seasonal influenza (flu) can lead to high hospitalization and mortality rates in high-risk populations, which results in significant healthcare burden globally. Thus, representing a need and large market opportunity for the influenza vaccine market. The global influenza vaccine market in 2022 stood at US\$7.98 billion, and is likely to reach US\$12.32 billion by 2028.

Globally, influenza infections lead to 3-5 million severe cases and 290- 650 thousand deaths annually. Some of the factors driving the rise in influenza vaccine demand include the increasing geriatric population, government support, rapid urbanization, rising prevalence of influenza epidemics and seasonal outbreaks, public health

awareness, and robust research and development investments. Governments worldwide, in collaboration with international health organizations such as the World Health Organization (WHO), recognize the vital role of influenza vaccination in public health and disease prevention. As a result, they implement various strategies that foster market expansion. They may even subsidize vaccines or offer them free of charge through public health programs, making vaccination more accessible to the general population, leading to the growth of influenza vaccine market. In the coming years, these improvements are expected to significantly enhance healthcare service and stimulate demand for influenza vaccine. The global influenza vaccine market value is projected to grow at a CAGR of 7.50%, during the forecast period of 2023-2028.

Market Segmentation Analysis:

By Valency: According to the report, the global influenza vaccine market is segmented into two segments based on the valency: Quadrivalent and Trivalent. Quadrivalent segment acquired majority of share in the market in 2022 and is the fastest growing segment as well, as it provides protection against four influenza virus strains (two influenza A strains and two influenza B strains). The demand for quadrivalent vaccines has increased in recent years, driven by factors such as public health recommendations and growing awareness of the seriousness of influenza.

By Vaccine Type: According to the report, the global influenza vaccine market is bifurcated into two types: Inactivated and Live Attenuated. Inactivated segment acquired majority of share in the market in 2022 and is the fastest growing segment as well, as it is made of killed influenza viruses or parts of the viruses and is administered through injection. The convenience of injection as an administration method and the availability of multiple manufacturers contribute to their widespread use. Furthermore, their well-established safety and effectiveness, public awareness campaigns and pandemic preparedness initiatives are collectively contributing to the growth of inactivated segment in the influenza vaccine market.

By Technology: According to the report, the global influenza vaccine market is bifurcated into two technologies: Egg-based and Cell-based. Egg-based segment acquired majority of share in the market in 2022, due to its long-established infrastructure, proven safety and efficacy, and large-scale production capabilities. Although, cell-based technology is the fastest growing segment as cell culture-based flu vaccine production does not require chicken eggs and has the potential for a faster start-up of the flu vaccine manufacturing process. Even, on August 31, 2016, FDA issued an approval for Seqirus, the sole FDA-approved cell culture-based flu vaccine

manufacturer in the US, to begin using cell culture-grown CVVs.

By Age Group: According to the report, the global influenza vaccine market is bifurcated into two age group: Adults and Pediatrics. Adult segment acquired majority of share in the market in 2022 as the adult population represents a substantial portion of the overall demographic in most regions and adults are more likely to fall into high-risk influenza complications. Furthermore, Adults in the workforce are also crucial targets, not only for their health but also for maintaining economic productivity, prompting employers to encourage vaccination. These factors collectively contribute to adult influenza vaccines maintaining a major market share among age groups in the influenza vaccine market. While, the pediatric segment is expected to register the fastest growing rate during the forecasted period as there is increasing number of influenza virus cases among children and parents are becoming more aware. Even, many countries are implementing school-based influenza vaccination programs to target this age group and reduce influenza transmission in educational settings, leading to growth of this segment.

By Route of Administration: According to the report, the global influenza vaccine market is bifurcated into two routes of administration: Injection and Nasal spray. Injection segment acquired majority of share in the market in 2022 and is the fastest growing segment as well, due to its versatility, proven safety, and broad recommendations. Injections are suitable for diverse populations, spanning infants to seniors and individuals with various health conditions, making them a universal choice. Additionally, injection-based vaccines are widely available and accepted, contributing to their predominant market position and potential for continued growth in the coming years.

By Distribution Channel: According to the report, the global influenza vaccine market is bifurcated into three distribution channels: Hospitals and Pharmacies, Government and Institutions and others. Hospitals and pharmacies hold a major share in the influenza vaccine market in 2022 due to its convenience, and trusted healthcare environments. They serve as go-to locations for receiving influenza vaccines during routine healthcare visits. With their staff of trained healthcare professionals, including nurses and pharmacists, these institutions ensure safe and effective vaccine administration, fostering confidence among vaccine recipients. While, government and institutions are the fastest growing segment during forecasted period due to the ongoing vaccination and immunization programs and the inclusion of influenza vaccines in vaccination programs around the world. For instance, in June 2022, the government of New Zealand expanded access to free-of-cost flu vaccines for children and people with mental health issues.

By Region: The report provides insight into the influenza vaccine market based on the geographical operations, namely North America, Europe, Asia Pacific, Latin America and Middle East and Africa. North America influenza vaccine market held the highest market share in 2022, primarily owing to reasons such as increasing prevalence of influenza infection in the US & Canada, increasing public awareness campaigns and educational initiatives, government-sponsored vaccination programs, regulatory support, and the recognition of high-risk groups like the elderly and pregnant women, the region's robust healthcare infrastructure, insurance coverage, and emphasis on patient-centered care. The US is the North America's strongest market for influenza vaccine because of its focus on technological advances in vaccine production, and increasing healthcare expenditure.

Asia Pacific influenza vaccine market is expected to experience fastest growth due to a burgeoning and diverse population, government initiatives and increasing healthcare awareness. Also, the region's vulnerability to seasonal outbreaks, coupled with the memory of past influenza pandemics and COVID pandemic, highlights the importance of vaccination. Furthermore, the availability of health insurance coverage and the growth of international travel further is expected to drive vaccine demand. China holds the largest share in Asia Pacific region owing the growing elderly population, region's vulnerability to seasonal influenza outbreaks and emergence of new flu, nation's expanding healthcare infrastructure, a burgeoning pharmaceutical industry, research and development initiatives, domestic vaccine production and introduction of artificial intelligence in healthcare industry.

Global Influenza vaccine Market Dynamics:

Growth Drivers: Increasing flu Burden among old population has the potential to boost the growth of the influenza vaccine market. As older adults are more vulnerable to influenza, it will significantly contribute to the sales of influenza vaccines. According to CDC, in the US, people 65+ years of age or those with risk factors (e.g., asthma, diabetes, heart disease, immunocompromised) who are infected with the flu are the most likely to experience severe illness or be hospitalized and this could potentially lead to worse outcomes and possible deaths (~85% of flu-related deaths and ~52% of flu-related hospitalizations occur among those 65 and older.). Further, the market is expected to increase due to favorable government initiatives, rapid urbanization, rising prevalence of influenza epidemics and seasonal outbreaks, public health awareness, and robust research and development investments etc.

Challenges: Longer production timeline can present several challenges for the influenza

vaccine market. Production timelines for influenza vaccines involve the development, production, and distribution of vaccines for each season. The process takes 5-10 years due to complex clinical development, vaccine research, and regulatory requirements. Regional differences in clinical trials and product approvals from regulatory bodies further complicate the process. Other challenges that influenza vaccine market faces are inequitable access to vaccines and high cost of vaccine development.

Trends: A major trend gaining pace in influenza vaccine market is Artificial Intelligence (AI) and machine learning as it assists in selecting the most appropriate virus strains for vaccines, designing antigens for optimal immune response, and even discovering potential antiviral drugs. Also, AI enables faster and more effective utilization of data collected from genetic testing, clinical trials, and research which reduces vaccine development time and increase efficacy. AI also assists in supply chain management for timely distribution and it monitors influenza spread through data analysis, enabling early outbreak detection. More trends in the market are believed to augment the growth of influenza vaccine market during the forecasted period include, technological advancements in vaccine administration, favorable government initiatives and policies, etc.

Impact Analysis of COVID-19 and Way Forward:

The COVID-19 pandemic has had positive impact on the global influenza vaccine market. Influenza virus and COVID 19 virus share same symptoms and spread in similar ways so vaccination became an important part of preventing severe disease and death for both COVID-19 and influenza. Even WHO recommended the influenza vaccine for older individuals, young children, pregnant people, people with underlying health conditions, and health workers. Post-COVID, the impact on influenza vaccine continues to drive sustained growth as individuals and healthcare systems prioritize vaccination to reduce the burden on healthcare resources, minimize the risk of co-infections with COVID-19, and enhance overall public health preparedness.

Competitive Landscape and Recent Developments:

Global Influenza vaccine market is fragmented. Key players of global Influenza vaccine market are:

GlaxoSmithKline Plc

Abbott

Pfizer Inc.

AstraZeneca Plc

Sanofi S.A.

Moderna Inc.

CSL Limited

Emergent BioSolutions Inc.

BIKEN Co., Ltd.

Serum Institute of India Pvt. Ltd.

Sinovac

GC Biopharma

The key players are constantly investing in strategic initiatives, such as adoption of new technologies, introducing their services to emerging markets and more, to maintain a competitive edge in this market. For instance, on April 10, 2023, Sinovac Biotech Ltd. opened a state-of-the-art influenza vaccine production facility in Beijing, utilizing green production processes and adherence to Chinese Good Manufacturing Practice guidelines.

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