

Asia-Pacific Vaccine Market - 2024 -2031

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Abstracts

Market Size

The Asia Pacific vaccine market reached US\$ 12.33 billion in 2023 and is expected to reach US\$ 17.82 billion by 2031, growing at a CAGR of 6.1% during the forecast period 2024-2031.

A vaccine is a biological preparation designed to stimulate the body's immune response against specific infectious diseases. Typically, vaccines contain weakened or inactivated forms of pathogens (such as viruses or bacteria), their components, or toxins. When administered, they prompt the immune system to recognize these agents as threats, allowing the body to develop immunity without causing the disease itself.

The increasing prevalence of infectious diseases and government awareness programs are the significant driver of growth in the Asia-Pacific vaccine market. According to WHO data Polio is a highly contagious viral illness that can lead to irreversible paralysis. In 2023, 83% of infants globally received three doses of the polio vaccine. Additionally, in countries still administering the oral polio vaccine (OPV), 83% of infants received their first dose of the inactivated polio vaccine (IPV).

However, the coverage for infants receiving their second dose of IPV in these countries is significantly lower, estimated at 42%. There is considerable variation in vaccination rates across different regions. For instance, the WHO European Region has an estimated coverage rate of 89%, while the WHO South-East Asia Region reports a much lower rate of only 6%. These factors have driven the Asia-Pacific vaccine market expansion.

Market Dynamics: Drivers & Restraints

Increasing prevalence of infectious diseases

The increasing prevalence of infectious diseases is a significant driver of growth in the Asia-Pacific vaccine market. This trend is influenced by various factors, including the resurgence of vaccine-preventable diseases, emerging infectious diseases, and heightened public awareness about the importance of vaccination.

Moreover, key players in the industry product launches that would drive the Asia-Pacific vaccine market growth. For instance, in January 2023, Bharat Biotech launched iNCOVACC, the world's first intranasal COVID-19 vaccine. This innovative vaccine is designed for adults aged 18 and older and has received emergency use authorization from India's Central Drugs Standard Control Organisation (CDSCO). All these factors demand the Asia-Pacific vaccine market.

Moreover, the government immunization programs and initiatives contribute to the Asia-Pacific vaccine market expansion.

Stringent regulatory requirements

The vaccine market in the Asia-Pacific region faces significant challenges due to stringent regulatory requirements, which contribute to delays in the approval and availability of new vaccines. Unlike regions such as the US and EU, which have centralized regulatory processes (e.g., the European Medicines Agency), the Asia-Pacific region lacks such coordination, leading to a fragmented regulatory landscape. This fragmentation results in varying approval processes and timelines across countries, which can delay market access for vaccines and are expected to hinder the Asia-Pacific vaccine market growth.

Furthermore, some countries in the region continue to operate under national regulatory authorities that require additional local data and clinical trials for approval, further prolonging the time it takes for vaccines to reach the market. Thus, the above factors could be limiting the Asia-Pacific vaccine market's potential growth.

Market Segment Analysis

The Asia-Pacific vaccine market is segmented based on composition, type, age group, route of administration, application, and end-user.

Type:

Subunit vaccine segment is expected to dominate the Asia-Pacific vaccine market share

The subunit vaccine segment holds a major portion of the Asia-Pacific vaccine market share and is expected to continue to hold a significant portion of the Asia-Pacific vaccine market share during the forecast period.

Subunit vaccines are a significant and growing Asia-Pacific vaccine market, characterized by their composition, safety profile, and effectiveness against various infectious diseases. Subunit vaccines contain purified components of pathogens, typically proteins or polysaccharides, rather than whole pathogens (live or inactivated). This approach minimizes the risk of disease while still eliciting a robust immune response. All these factors propel the segment growth in the Asia-Pacific vaccine market.

Moreover, the strategies of key players in the Asia-Pacific vaccine industry such as partnerships & collaborations, and product launches propel this segment's growth in the Asia-Pacific vaccine market. For instance, in June 2023, GSK plc announced that the Japanese Ministry of Health, Labour and Welfare (MHLW) had approved an updated indication for its vaccine Shingrix (Recombinant Zoster Vaccine, Adjuvanted - RZV).

This approval allows the vaccine to be used for the prevention of shingles (herpes zoster) in adults aged 18 years and older who are at increased risk of developing the condition. RZV, or Recombinant Zoster Vaccine, is a non-live, recombinant sub-unit vaccine approved by Japan's Ministry of Health, Labour and Welfare (MHLW) for the prevention of shingles (herpes zoster). These factors have solidified the segment's position in the Asia-Pacific vaccine market.

Live-attenuated vaccines segment is the fastest-growing segment in the Asia-Pacific vaccine market share

The live-attenuated vaccines segment is the fastest-growing segment in the Asia-Pacific vaccine market share and is expected to hold the market share over the forecast period.

Live-attenuated vaccines contain pathogens (viruses or bacteria) that have been weakened, or 'attenuated,' so they can no longer cause disease in healthy individuals. This attenuation is typically achieved through various laboratory processes, including repeated culturing, which reduces the virulence of the pathogen while allowing it to retain its ability to replicate within the host. All these factors propel the segment growth

in the Asia-Pacific vaccine market.

Many countries within the Asia-Pacific region are actively enhancing their healthcare systems. This includes expanding vaccination programs and improving access to vaccines, especially in developing nations where healthcare access has historically been limited. These factors have solidified the segment's position in the Asia-Pacific vaccine market.

Composition :

Combination vaccines segment is expected to dominate the Asia-Pacific vaccine market share

The combination vaccines segment holds a major portion of the Asia-Pacific vaccine market share and is expected to continue to hold a significant portion of the Asia-Pacific vaccine market share during the forecast period.

Combination vaccines are innovative formulations that combine two or more individual vaccines into a single injection, allowing for simultaneous protection against multiple diseases. This approach is particularly beneficial in pediatric immunization, where children often require numerous vaccinations during their early years.

Combination vaccines contain live attenuated or inactivated pathogens that have been specifically formulated to target multiple diseases. For instance, the DTaP-HepB-IPV vaccine protects against diphtheria, tetanus, pertussis, hepatitis B, and inactivated poliovirus in one shot. Similarly, the MMRV vaccine protects against measles, mumps, rubella, and varicella (chickenpox). All these factors propel the segment growth in the Asia-Pacific vaccine market.

Additionally, China's National Immunization Program (NIP) was initiated in 1978 and has been a model of public health success, having achieved over 95% coverage for children under six years old with 14 vaccines targeting 15 diseases. It reflects a monumental public health achievement in the fight against infectious diseases. However, despite these successes, China's NIP faces ongoing challenges, particularly in expanding the list of free vaccine offerings. These factors have solidified the segment's position in the Asia-Pacific vaccine market.

Mono vaccines segment is the fastest-growing segment in the Asia-Pacific vaccine market share

The mono vaccines segment is the fastest-growing segment in the Asia-Pacific vaccine market share and is expected to hold the market share over the forecast period.

Mono vaccines are designed to provide immunity against specific pathogens, making them particularly effective for preventing diseases such as hepatitis A, meningococcal disease, and yellow fever. For instance, the Hepatitis A vaccine is crucial in areas where hepatitis A is prevalent. It has a strong safety profile and is effective in preventing liver inflammation caused by the virus, which can lead to severe health complications. All these factors propel the segment growth in the Asia-Pacific vaccine market.

Furthermore, key players in the region's awareness programs and government initiatives would drive this segment's growth in the Asia-Pacific vaccine market. For instance, in 2021, the Government of Japan pledged a new USD 9.6 million agreement with UNICEF and WHO to strengthen immunization in the Pacific vaccine market in the region.

The agreement will support Pacific governments including Fiji, the Federated States of Micronesia, Kiribati, Palau, and the Republic of Marshall Islands. UNICEF and WHO in the Pacific will work collaboratively with national health authorities to strengthen health programs through effective and safe immunization. These factors have solidified the segment's position in the Asia-Pacific vaccine market.

Market Geographical Share

Japan is expected to hold a significant position in the Asia-Pacific vaccine market share

Japan holds a substantial position in the Asia-Pacific vaccine market and is expected to hold most of the market share.

Japan's strong commitment to public health significantly influences its growth in the Asia-Pacific vaccine market by fostering a robust framework for vaccination programs aimed at preventing infectious diseases. The government's proactive approach encompasses various strategies that enhance immunization efforts, ensuring that the population is protected against a range of diseases.

For instance, The Japanese Ministry of Health, Labour, and Welfare (MHLW) administers extensive immunization programs that encompass vaccines for a variety of diseases, including influenza, hepatitis B, and HPV. This emphasis on preventive

healthcare is crucial for managing outbreaks and decreasing the occurrence of diseases that can be prevented through vaccination. Innovations in vaccine technology play a crucial role in driving the Asia-Pacific vaccine market.

Moreover, in this region, a majority of key players' presence, well-advanced healthcare infrastructure, government initiatives & regulatory support, and technological advancements, & investments would propel the Asia-Pacific vaccine market growth. For instance, in September 2024, Japan's Ministry of Health, Labor, and Welfare approved the updated self-amplifying mRNA COVID-19 vaccine known as ARCT-154, branded as Kostaive. This vaccine, developed by CSL Seqirus and Arcturus Therapeutics, is specifically designed to target the JN1 lineage of Omicron subvariants and is intended for adults aged 18 years and older. Thus, the above factors are consolidating the country's position as a dominant force in the Asia-Pacific vaccine market.

India is growing at the fastest pace in the Asia-Pacific vaccine market.

India holds the fastest pace in the Asia-Pacific vaccine market and is expected to hold most of the market share.

The Asia-Pacific vaccine market is driven by factors such as the increasing prevalence of infectious diseases, growth in immunization programs & campaigns, rising government support, and technological advancements. The increasing prevalence of infectious diseases has led to a surge in regional immunization programs and campaigns. Governments and health organizations are launching initiatives to raise awareness and encourage vaccination against diseases such as hepatitis, diphtheria, and polio.

India holds a major portion of the market share owing to the focus on preventive healthcare, technological advancements, government support and investment, rising awareness of infectious diseases, and expansion of vaccination programs. All these factors drive the country's growth in the Asia-Pacific vaccine market.

Governments across Asia-Pacific have introduced national immunization programs, often with financial support and subsidies, to make vaccines more accessible and affordable. These programs aim to achieve high immunization coverage, especially in rural and underprivileged areas.

For instance, the Government of India, 2024, proposed a vaccination called NARI SHAKTI, to prevent Cervical Cancer and amalgamation of various schemes for

maternal and child care, as she presented the Interim Budget 2024-25 in Parliament. The vaccination program will be for girls in the age group of 9 to 14 years for the prevention of cervical cancer. The Government will encourage this vaccination among the eligible categories. Thus, the above factors are consolidating the country's position as the fastest-growing force in the Asia-Pacific vaccine market.

Market Companies

The major Asia-pacific players in the Asia-Pacific vaccine market include Serum Institute of India Pvt. Ltd., Bharat Biotech, CSL, GSK plc, Pfizer Inc., Biological E Limited., Takeda Pharmaceutical Company Limited., Sanofi, Merck & Co., Inc., and Abbott among others.

Emerging Players

The emerging players in the Asia-Pacific vaccine market include SINOVAC, Zhi Fei Biological, and Incepta Pharmaceuticals Ltd. among others.

Key Developments

In September 2024, the Quad countries such as the United States, Australia, India, and Japan launched the Quad Cancer Moonshot Initiative, a significant effort aimed at combating cancer in the Indo-Pacific region, with an initial focus on cervical cancer. This initiative is a response to the pressing health crisis posed by cervical cancer, which is largely preventable but continues to affect many women across the region.

In February 2024, Japan's Takeda Pharmaceutical Company was in discussions with Indian regulators to facilitate the introduction of its dengue vaccine, QDenga, in India. This initiative is significant as dengue fever has become a major public health concern in the country, with numerous cases reported annually.

In January 2024, Indian Immunologicals Ltd (IIL) launched Havisure, India's first indigenously developed hepatitis A vaccine. This development marks a significant milestone in the country's public health efforts to combat hepatitis A, a highly contagious liver infection.

Why Purchase the Report?

To visualize the Asia-Pacific vaccine market segmentation based on composition, type, age group, route of administration, application, and end-user, and understand key commercial assets and players.

Identify commercial opportunities by analyzing trends and co-development.

Excel data sheet with numerous data points of the vaccine Market with all segments.

PDF report consists of a comprehensive analysis after exhaustive qualitative interviews and an in-depth study.

Product mapping is available in excel consisting of key products of all the major players.

The Asia-Pacific vaccine market report would provide approximately 60 tables, 56 figures, and 183 pages.

Target Audience 2024

Manufacturers/ Buyers

Industry Investors/Investment Bankers

Research Professionals

Emerging Companies

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