

Global DTaP Vaccine Market - 2025-2033

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Abstracts

Global DTaP Vaccine Market – Industry Trends & Outlook

The global DTaP vaccine market reached US\$ 5,378.83 Million in 2024 and is expected to reach US\$ 11,592.17 Million by 2033, growing at a CAGR of 8.9% during the forecast period of 2025-2033.

DTaP stands for diphtheria, tetanus, and acellular pertussis vaccine combination shot designed to protect children from these three serious bacterial diseases. In the United States, DTaP is routinely given as a five-dose series to infants and young children at 2, 4, and 6 months, 15–18 months, and 4–6 years of age. The vaccine uses inactivated components: diphtheria and tetanus toxoids, and purified antigens from the pertussis bacterium, making it safe and effective for young children.

Market key trends include increasing adoption of combination vaccines, which streamline immunization schedules and improve compliance. Significant investment in R&D, including the use of artificial intelligence for vaccine development and strategic acquisitions.

Key drivers in the market industry include the growing incidence of infectious diseases, especially pertussis outbreaks, which are fueling demand for effective immunization. Rising adoption of combination vaccines, government policies, and universal immunization programs, such as India's universal immunization program, supports widespread vaccine adoption. Advancements in vaccine technology and the introduction of high-valent and combination vaccines.

Expansion into emerging economies like India, China, Brazil, and Indonesia, where increasing healthcare investments and rising populations create significant growth potential, and the development of new combination vaccines and innovative delivery

methods to address diverse healthcare needs is a significant opportunity for the market.

Global DTaP Vaccine Market Dynamics: Drivers & Restraints

Rising adoption of combination vaccines

The growing preference for combination vaccines is a key driver in the global DTaP vaccine market. By streamlining immunization schedules and reducing the number of clinic visits, combination vaccines help increase vaccination coverage rates, reduce healthcare costs, and improve overall public health outcomes. As a result, the demand for DTaP-containing combination vaccines is expected to continue rising, fueling growth in the global market.

Common combination vaccines for children-such as Pediarix, Pentacel, Kinrix, Quadracel, Vaxelis, and ProQuad-play a key role in driving the global DTaP vaccine market by simplifying immunization schedules and improving compliance. These vaccines combine protection against multiple diseases (like diphtheria, tetanus, pertussis, polio, hepatitis B, and Haemophilus influenzae type B) into a single shot, reducing the number of injections needed and making it easier for parents and healthcare providers to ensure children are fully immunized.

According to the ScienceDirect Vaccines data in April 2025, Diphtheria-tetanus-pertussis-containing vaccines (DTPCVs) are at the leading edge of combination vaccine innovation worldwide. However, the approval and availability of high-valent DTPCVs differ across countries due to varying regulatory standards. To meet urgent public health demands, some national regulatory authorities (NRAs) have implemented more flexible and expedited pathways to accelerate the licensing and adoption of these essential vaccines.

The convenience and efficiency of these combination vaccines have led to their widespread adoption, fueling market growth as the pediatric population rises and demand for streamlined, comprehensive immunization increases. All these factors demand the global DTaP vaccine market.

Supply chain and distribution challenges

The supply chain and distribution challenges will hinder the growth of the global DTaP vaccine market. DTaP vaccines are biologics that require complex manufacturing

processes and cold chain logistics. Disruptions in production (e.g., due to facility upgrades or regulatory issues) or transportation delays can result in shortages or uneven distribution, limiting access in some regions.

DTaP vaccines are sensitive biological products that require strict temperature control (typically 2–8°C) during storage and transportation. Any break in the cold chain can compromise vaccine potency, leading to wastage and reduced effectiveness. Maintaining this cold chain is particularly challenging in low-resource settings, rural areas, and regions with unreliable power supplies.

The distribution of vaccines involves multiple steps, including manufacturing, warehousing, transportation, and delivery to healthcare facilities. Each step introduces risks of delays, mishandling, or misplacement. Inadequate infrastructure, limited transportation options, and customs clearance delays can further complicate timely vaccine delivery, especially in remote or conflict-affected regions.

Different countries have varying regulatory requirements for vaccine approval, importation, and distribution. Navigating these regulations can slow down the supply chain, especially when rapid deployment is needed during public health emergencies. Thus, the above factors could be limiting the global DTaP vaccine market's potential growth.

Global DTaP Vaccine Market - Segment Analysis

The global DTaP vaccine market is segmented based on product type, disease type, age group, and region.

Product Type:

The DTaP vaccine(diphtheria, tetanus, acellular pertussis vaccine) segment was valued at US\$ 2,930.97 million in 2024 and is estimated to reach US\$ 5,318.69 million by 2033, growing at a CAGR of 6-7% during the forecast period from 2025-2033

DTaP stands for diphtheria, tetanus, and acellular pertussis. The “acellular” part means that the pertussis component uses purified parts of the bacteria, making the vaccine safer and causing fewer side effects compared to older versions.

The DTaP vaccine is a combination immunization that protects against three serious bacterial infections. Diphtheria is a respiratory disease caused by *Corynebacterium*

diphtheriae, which can lead to breathing problems, heart failure, and death. Tetanus is caused by *Clostridium tetani*. This infection leads to muscle stiffness and spasms, often referred to as "lockjaw." Pertussis (whooping cough) is caused by *Bordetella pertussis*. It is a highly contagious respiratory disease known for severe coughing fits.

Additionally, key players in the industry and their product launches, approvals that will drive this segment's growth in the market. For instance, in July 2024, the DTaP vaccine is an FDA-approved, five-dose immunization series recommended for young children in the United States to protect against diphtheria, tetanus, and pertussis (whooping cough). DTaP stands for diphtheria, tetanus, and acellular pertussis, and the vaccine helps prevent these serious childhood diseases before age seven. These factors have solidified the segment's position in the global DTaP vaccine market.

Global DTaP Vaccine Market – Geographical Analysis

The North America DTaP vaccine market was valued at US\$ 2,323.65 million in 2024 and is estimated to reach US\$ 5,007.82 million by 2033, growing at a CAGR of 7-8% during the forecast period from 2025-2033

In the U.S. and Canada, DTaP vaccination is mandatory for school entry, which ensures high compliance and consistent demand. National programs like the Vaccines for Children (VFC) in the U.S. provide free vaccines, including DTaP, to eligible populations, boosting market penetration.

Public health authorities like the CDC, Health Canada, and organizations like the AAP (American Academy of Pediatrics) run ongoing awareness programs about vaccine-preventable diseases and the importance of the DTaP series. These campaigns help counter vaccine hesitancy and maintain high vaccination rates.

For instance, in July 2024, Haiti's Ministry of Public Health and Population recently vaccinated over 230,000 children as part of a targeted campaign aimed at reducing infant mortality from diphtheria. Supported by funding from the Government of Canada, the Pan American Health Organization (PAHO/WHO) provided essential technical and logistical assistance to help implement the campaign successfully.

North America is home to major vaccine manufacturers and R&D centers, such as Sanofi, GSK, Merck, and others, driving innovation and supply reliability. Growing adoption of combination vaccines (e.g., DTaP-HepB-IPV) reduces the number of injections per visit, improving patient compliance and provider convenience. Innovations

in vaccine formulation and delivery (e.g., fewer side effects, better stability) support product differentiation and adoption.

For instance, in January 2023, the FDA approved the Adacel (Tdap) vaccine for use during the third trimester of pregnancy to help protect infants younger than two months from pertussis (whooping cough), providing crucial protection before infants are old enough to receive their first scheduled vaccine dose at two months of age. Thus, the above factors are consolidating the region's position as a dominant force in the global DTaP vaccine market.

The Asia-Pacific DTaP vaccine market was valued at US\$ 1,258.65 million in 2024 and is estimated to reach US\$ 2,712.57 million by 2033, growing at a CAGR of 8-9% during the forecast period from 2025-2033

The region's substantial paediatric population, especially in countries like China and India, creates strong demand for routine childhood immunizations, making Asia Pacific the largest and fastest-growing DTaP market. National initiatives such as India's Universal Immunization Program and similar efforts across Southeast Asia and China are expanding vaccine coverage and ensuring regular DTaP administration to infants and children.

Countries like India, China, and Japan have significantly scaled up their national immunization programs, including DTaP or pentavalent vaccines that contain DTaP components. Governments are increasingly including combination vaccines in public procurement to meet WHO immunization targets.

For instance, in December 2023, Panacea Biotech announced the launch of EasyFourPol, the world's first fully liquid wP-IPV-based pentavalent vaccine, in India. EasyFourPol protects children against five serious diseases: diphtheria, tetanus, pertussis (whooping cough), polio, and invasive infections caused by *Haemophilus influenzae* type b. This innovative, ready-to-use combination vaccine streamlines the immunization process by eliminating the need for reconstitution, reducing the number of injections required, and supporting greater comfort and compliance for children and parents. Thus, the above factors are consolidating the region's position as a dominant force in the global DTaP vaccine market.

Global DTaP Vaccine Market – Competitive Landscape

The major global players in the DTaP vaccine market include Sanofi, GSK plc, Merck &

Co., Inc., Serum Institute of India Pvt. Ltd., Bio Farma, Biological E, Panacea Biotec, Walvax Biotechnology Co., Ltd., Bharat Biotech., MassBiologics, and Mitsubishi Tanabe Pharma Corporation among others.

Global DTaP Vaccine Market – Key Developments

In July 2022, DAPTACEL is a vaccine produced by Sanofi Pasteur, Ltd., and is officially named "Diphtheria and Tetanus Toxoids and Acellular Pertussis Vaccine Adsorbed." It is indicated for active immunization against diphtheria, tetanus, and pertussis in infants and children from 6 weeks up to 6 years old.

Contents

1. MARKET INTRODUCTION AND SCOPE

- 1.1. Objectives of the Report
- 1.2. Report Coverage & Definitions
- 1.3. Report Scope

2. EXECUTIVE INSIGHTS AND KEY TAKEAWAYS

- 2.1. Market Highlights and Strategic Takeaways
- 2.2. Key Trends and Future Projections
- 2.3. Snippet by Product Type
- 2.4. Snippet by Disease Type
- 2.5. Snippet by Age Group
- 2.6. Snippet by Region

3. DYNAMICS

- 3.1. Impacting Factors
 - 3.1.1. Drivers
 - 3.1.1.1. Rising Adoption of Combination Vaccines
 - 3.1.1.2. Expansion of Adult and Booster Vaccination Programs
 - 3.1.1.3. XX
 - 3.1.2. Restraints
 - 3.1.2.1. Supply Chain and Distribution Challenges
 - 3.1.2.2. High Cost of Vaccines
 - 3.1.2.3. XX
 - 3.1.3. Opportunity
 - 3.1.3.1. Expansion in Emerging Markets
 - 3.1.3.2. XX
 - 3.1.4. Impact Analysis

4. STRATEGIC INSIGHTS AND INDUSTRY OUTLOOK

- 4.1. Market Leaders and Pioneers
 - 4.1.1. Emerging Pioneers and Prominent Players
 - 4.1.2. Established leaders with the largest-selling Brand
 - 4.1.3. Market leaders with established Product

- 4.2. CXO Perspectives
- 4.3. Latest Developments and Breakthroughs
- 4.4. Regulatory and Reimbursement Landscape
 - 4.4.1. North America
 - 4.4.2. Europe
 - 4.4.3. Asia Pacific
 - 4.4.4. South America
 - 4.4.5. Middle East & Africa
- 4.5. Porter's Five Forces Analysis
- 4.6. Supply Chain Analysis
- 4.7. Patent Analysis
- 4.8. SWOT Analysis
- 4.9. Unmet Needs and Gaps
- 4.10. Recommended Strategies for Market Entry and Expansion
- 4.11. Scenario Analysis: Best-Case, Base-Case, and Worst-Case Forecasts
- 4.12. Pricing Analysis and Price Dynamics
- 4.13. Key Opinion Leaders

5. GLOBAL DTAP VACCINE MARKET, BY PRODUCT TYPE

- 5.1. Introduction
 - 5.1.1. Analysis and Y-o-Y Growth Analysis (%), By Product Type
 - 5.1.2. Market Attractiveness Index by Product Type
- 5.2. DTaP Vaccine (Diphtheria Tetanus acellular Pertussis Vaccine) *
 - 5.2.1. Introduction
 - 5.2.2. Market Size Analysis and Y-o-Y Growth Analysis (%)
- 5.3. Tdap (Tetanus Diphtheria acellular Pertussis Vaccine)

6. GLOBAL DTAP VACCINE MARKET, BY DISEASE TYPE

- 6.1. Introduction
 - 6.1.1. Market Size Analysis and Y-o-Y Growth Analysis (%), By Disease Type
 - 6.1.2. Market Attractiveness Index by Disease Type
- 6.2. Diphtheria*
 - 6.2.1. Introduction
 - 6.2.2. Market Size Analysis and Y-o-Y Growth Analysis (%)
- 6.3. Tetanus
- 6.4. Pertussis

7. GLOBAL DTAP VACCINE MARKET, BY AGE GROUP

7.1. Introduction

7.1.1. Market Size Analysis and Y-o-Y Growth Analysis (%), By Age Group

7.1.2. Market Attractiveness Index by Age Group

7.2. Adult *

7.2.1. Introduction

7.2.2. Market Size Analysis and Y-o-Y Growth Analysis (%)

7.3. Pediatric

8. GLOBAL DTAP VACCINE MARKET, BY REGIONAL MARKET ANALYSIS AND GROWTH OPPORTUNITIES

8.1. Introduction

8.1.1. Market Size Analysis and Y-o-Y Growth Analysis (%), By Region

8.1.2. Market Attractiveness Index, By Region

8.2. North America

8.2.1. Introduction

8.2.2. Key Region-Specific Dynamics

8.2.3. Market Size Analysis and Y-o-Y Growth Analysis (%), By Product Type

8.2.4. Market Size Analysis and Y-o-Y Growth Analysis (%), By Disease Type

8.2.5. Market Size Analysis and Y-o-Y Growth Analysis (%), By Age Group

8.2.6. Market Size Analysis and Y-o-Y Growth Analysis (%), By Country

8.2.6.1. U.S.

8.2.6.2. Canada

8.2.6.3. Mexico

8.3. Europe

8.3.1. Introduction

8.3.2. Key Region-Specific Dynamics

8.3.3. Market Size Analysis and Y-o-Y Growth Analysis (%), By Product Type

8.3.4. Market Size Analysis and Y-o-Y Growth Analysis (%), By Disease Type

8.3.5. Market Size Analysis and Y-o-Y Growth Analysis (%), By Age Group

8.3.6. Market Size Analysis and Y-o-Y Growth Analysis (%), By Country

8.3.6.1. Germany

8.3.6.2. U.K.

8.3.6.3. France

8.3.6.4. Spain

8.3.6.5. Italy

8.3.6.6. Rest of Europe

8.4. South America

8.4.1. Introduction

8.4.2. Key Region-Specific Dynamics

8.4.3. Market Size Analysis and Y-o-Y Growth Analysis (%), By Product Type

8.4.4. Market Size Analysis and Y-o-Y Growth Analysis (%), By Disease Type

8.4.5. Market Size Analysis and Y-o-Y Growth Analysis (%), By Age Group

8.4.6. Market Size Analysis and Y-o-Y Growth Analysis (%), By Country

8.4.6.1. Brazil

8.4.6.2. Argentina

8.4.6.3. Rest of South America

8.5. Asia-Pacific

8.5.1. Introduction

8.5.2. Key Region-Specific Dynamics

8.5.3. Market Size Analysis and Y-o-Y Growth Analysis (%), By Product Type

8.5.4. Market Size Analysis and Y-o-Y Growth Analysis (%), By Disease Type

8.5.5. Market Size Analysis and Y-o-Y Growth Analysis (%), By Age Group

8.5.6. Market Size Analysis and Y-o-Y Growth Analysis (%), By Country

8.5.6.1. China

8.5.6.2. India

8.5.6.3. Japan

8.5.6.4. South Korea

8.5.6.5. Rest of Asia-Pacific

8.6. Middle East and Africa

8.6.1. Introduction

8.6.2. Key Region-Specific Dynamics

8.6.3. Market Size Analysis and Y-o-Y Growth Analysis (%), By Product Type

8.6.4. Market Size Analysis and Y-o-Y Growth Analysis (%), By Disease Type

8.6.5. Market Size Analysis and Y-o-Y Growth Analysis (%), By Age Group

9. COMPETITIVE LANDSCAPE AND MARKET POSITIONING

9.1. Competitive Overview and Key Market Players

9.2. Market Share Analysis and Positioning Matrix

9.3. Strategic Partnerships, Mergers & Acquisitions

9.4. Key Developments in Product Portfolios and Innovations

9.5. Company Benchmarking

10. COMPANY PROFILES

10.1. Sanofi*

10.1.1. Company Overview

10.1.2. Product Portfolio

10.1.2.1. Product Description

10.1.2.2. Product Key Performance Indicators (KPIs)

10.1.2.3. Historic and Forecasted Product Sales

10.1.2.4. Product Sales Volume

10.1.3. Financial Overview

10.1.3.1. Company Revenue

10.1.3.2. Geographical Revenue Shares

10.1.3.3. Revenue Forecasts

10.1.4. Key Developments

10.1.4.1. Mergers & Acquisitions

10.1.4.2. Key Product Development Activities

10.1.4.3. Regulatory Approvals, etc.

10.1.5. SWOT Analysis

10.2. GSK plc.

10.3. Merck & Co., Inc.

10.4. Serum Institute of India Pvt. Ltd.

10.5. Bio Farma

10.6. Biological E

10.7. Panacea Biotec

10.8. Walvax Biotechnology Co., Ltd.

10.9. Bharat Biotech.

10.10. MassBiologics

10.11. Mitsubishi Tanabe Pharma Corporation

LIST NOT EXHAUSTIVE

11. ASSUMPTIONS AND RESEARCH METHODOLOGY

11.1. Data Collection Methods

11.2. Data Triangulation

11.3. Forecasting Techniques

11.4. Data Verification and Validation

12. APPENDIX

12.1. About Us and Services

12.2. Contact Us

List Of Tables

LIST OF TABLES

Table 1 Global DTaP Vaccine Market Value, By Product Type, 2025, 2029 & 2033 (US\$ Billion)

Table 2 Global DTaP Vaccine Market Value, By Disease Type, 2025, 2029 & 2033 (US\$ Billion)

Table 3 Global DTaP Vaccine Market Value, By Age Group, 2025, 2029 & 2033 (US\$ Billion)

Table 4 Global DTaP Vaccine Market Value, By Region, 2025, 2029 & 2033 (US\$ Billion)

Table 5 Global DTaP Vaccine Market Value, By Product Type, 2025, 2029 & 2033 (US\$ Billion)

Table 6 Global DTaP Vaccine Market Value, By Product Type, 2022-2033 (US\$ Billion)

Table 7 Global DTaP Vaccine Market Value, By Disease Type, 2025, 2029 & 2033 (US\$ Billion)

Table 8 Global DTaP Vaccine Market Value, By Disease Type, 2022-2033 (US\$ Billion)

Table 9 Global DTaP Vaccine Market Value, By Age Group, 2025, 2029 & 2033 (US\$ Billion)

Table 10 Global DTaP Vaccine Market Value, By Age Group, 2022-2033 (US\$ Billion)

Table 11 Global DTaP Vaccine Market Value, By Region, 2025, 2029 & 2033 (US\$ Billion)

Table 12 Global DTaP Vaccine Market Value, By Region, 2022-2033 (US\$ Billion)

Table 13 North America DTaP Vaccine Market Value, By Product Type, 2022-2033 (US\$ Billion)

Table 14 North America DTaP Vaccine Market Value, By Disease Type, 2022-2033 (US\$ Billion)

Table 15 North America DTaP Vaccine Market Value, By Age Group, 2022-2033 (US\$ Billion)

Table 16 North America DTaP Vaccine Market Value, By Country, 2022-2033 (US\$ Billion)

Table 17 South America DTaP Vaccine Market Value, By Product Type, 2022-2033 (US\$ Billion)

Table 18 South America DTaP Vaccine Market Value, By Disease Type, 2022-2033 (US\$ Billion)

Table 19 South America DTaP Vaccine Market Value, By Age Group, 2022-2033 (US\$ Billion)

Table 20 South America DTaP Vaccine Market Value, By Country, 2022-2033 (US\$ Billion)

Billion)

Table 21 Europe DTaP Vaccine Market Value, By Product Type, 2022-2033 (US\$ Billion)

Table 22 Europe DTaP Vaccine Market Value, By Disease Type, 2022-2033 (US\$ Billion)

Table 23 Europe DTaP Vaccine Market Value, By Age Group, 2022-2033 (US\$ Billion)

Table 24 Europe DTaP Vaccine Market Value, By Country, 2022-2033 (US\$ Billion)

Table 25 Asia-Pacific DTaP Vaccine Market Value, By Product Type, 2022-2033 (US\$ Billion)

Table 26 Asia-Pacific DTaP Vaccine Market Value, By Disease Type, 2022-2033 (US\$ Billion)

Table 27 Asia-Pacific DTaP Vaccine Market Value, By Age Group, 2022-2033 (US\$ Billion)

Table 28 Asia-Pacific DTaP Vaccine Market Value, By Country, 2022-2033 (US\$ Billion)

Table 29 Middle East and Africa DTaP Vaccine Market Value, By Product Type, 2022-2033 (US\$ Billion)

Table 30 Middle East and Africa DTaP Vaccine Market Value, By Disease Type, 2022-2033 (US\$ Billion)

Table 31 Middle East and Africa DTaP Vaccine Market Value, By Age Group, 2022-2033 (US\$ Billion)

Table 32 Middle East and Africa DTaP Vaccine Market Value, By Country, 2022-2033 (US\$ Billion)

Table 33 Sanofi: Overview

Table 34 Sanofi: Product Portfolio

Table 35 Sanofi: Key Developments

Table 36 GSK plc.: Overview

Table 37 GSK plc.: Product Portfolio

Table 38 GSK plc.: Key Developments

Table 39 Merck & Co., Inc.: Overview

Table 40 Merck & Co., Inc.: Product Portfolio

Table 41 Merck & Co., Inc.: Key Developments

Table 42 Serum Institute of India Pvt. Ltd.: Overview

Table 43 Serum Institute of India Pvt. Ltd.: Product Portfolio

Table 44 Serum Institute of India Pvt. Ltd.: Key Developments

Table 45 Bio Farma: Overview

Table 46 Bio Farma: Product Portfolio

Table 47 Bio Farma: Key Developments

Table 48 Biological E: Overview

Table 49 Biological E: Product Portfolio

Table 50 Biological E: Key Developments
Table 51 Panacea Biotech: Overview
Table 52 Panacea Biotech: Product Portfolio
Table 53 Panacea Biotech: Key Developments
Table 54 Walvax Biotechnology Co., Ltd.: Overview
Table 55 Walvax Biotechnology Co., Ltd.: Product Portfolio
Table 56 Walvax Biotechnology Co., Ltd.: Key Developments
Table 57 Bharat Biotech.: Overview
Table 58 Bharat Biotech.: Product Portfolio
Table 59 Bharat Biotech.: Key Developments
Table 60 MassBiologics: Overview
Table 61 MassBiologics: Product Portfolio
Table 62 MassBiologics: Key Developments
Table 63 Mitsubishi Tanabe Pharma Corporation: Overview
Table 64 Mitsubishi Tanabe Pharma Corporation: Product Portfolio
Table 65 Mitsubishi Tanabe Pharma Corporation: Key Developments

List Of Figures

LIST OF FIGURES

Figure 1 Global DTaP Vaccine Market Value, 2022-2033 (US\$ Billion)

Figure 2 Global DTaP Vaccine Market Share, By Product Type, 2024 & 2033 (%)

Figure 3 Global DTaP Vaccine Market Share, By Disease Type, 2024 & 2033 (%)

Figure 4 Global DTaP Vaccine Market Share, By Age Group, 2024 & 2033 (%)

Figure 5 Global DTaP Vaccine Market Share, By Region, 2024 & 2033 (%)

Figure 6 Global DTaP Vaccine Market Y-o-Y Growth, By Product Type, 2023-2033 (%)

Figure 7 DTaP Vaccine (Diphtheria Tetanus acellular Pertussis Vaccine) DTaP Vaccine Market Value, 2022-2033 (US\$ Billion)

Figure 8 Tdap (Tetanus Diphtheria acellular Pertussis Vaccine) DTaP Vaccine Market Value, 2022-2033 (US\$ Billion)

Figure 9 Global DTaP Vaccine Market Y-o-Y Growth, By Disease Type, 2023-2033 (%)

Figure 10 Diphtheria Disease Type in Global DTaP Vaccine Market Value, 2022-2033 (US\$ Billion)

Figure 11 Tetanus Disease Type in Global DTaP Vaccine Market Value, 2022-2033 (US\$ Billion)

Figure 12 Pertussis Disease Type in Global DTaP Vaccine Market Value, 2022-2033 (US\$ Billion)

Figure 13 Global DTaP Vaccine Market Y-o-Y Growth, By Age Group, 2023-2033 (%)

Figure 14 Adult Age Group in Global DTaP Vaccine Market Value, 2022-2033 (US\$ Billion)

Figure 15 Pediatric Age Group in Global DTaP Vaccine Market Value, 2022-2033 (US\$ Billion)

Figure 16 Global DTaP Vaccine Market Y-o-Y Growth, By Region, 2023-2033 (%)

Figure 17 North America DTaP Vaccine Market Value, 2022-2033 (US\$ Billion)

Figure 18 North America DTaP Vaccine Market Share, By Product Type, 2024 & 2033 (%)

Figure 19 North America DTaP Vaccine Market Share, By Disease Type, 2024 & 2033 (%)

Figure 20 North America DTaP Vaccine Market Share, By Age Group, 2024 & 2033 (%)

Figure 21 North America DTaP Vaccine Market Share, By Country, 2024 & 2033 (%)

Figure 22 South America DTaP Vaccine Market Value, 2022-2033 (US\$ Billion)

Figure 23 South America DTaP Vaccine Market Share, By Product Type, 2024 & 2033 (%)

Figure 24 South America DTaP Vaccine Market Share, By Disease Type, 2024 & 2033 (%)

Figure 25 South America DTaP Vaccine Market Share, By Age Group, 2024 & 2033 (%)

Figure 26 South America DTaP Vaccine Market Share, By Country, 2024 & 2033 (%)

Figure 27 Europe DTaP Vaccine Market Value, 2022-2033 (US\$ Billion)

Figure 28 Europe DTaP Vaccine Market Share, By Product Type, 2024 & 2033 (%)

Figure 29 Europe DTaP Vaccine Market Share, By Disease Type, 2024 & 2033 (%)

Figure 30 Europe DTaP Vaccine Market Share, By Age Group, 2024 & 2033 (%)

Figure 31 Europe DTaP Vaccine Market Share, By Country, 2024 & 2033 (%)

Figure 32 Asia-Pacific DTaP Vaccine Market Value, 2022-2033 (US\$ Billion)

Figure 33 Asia-Pacific DTaP Vaccine Market Share, By Product Type, 2024 & 2033 (%)

Figure 34 Asia-Pacific DTaP Vaccine Market Share, By Disease Type, 2024 & 2033 (%)

Figure 35 Asia-Pacific DTaP Vaccine Market Share, By Age Group, 2024 & 2033 (%)

Figure 36 Asia-Pacific DTaP Vaccine Market Share, By Country, 2024 & 2033 (%)

Figure 37 Middle East and Africa DTaP Vaccine Market Value, 2022-2033 (US\$ Billion)

Figure 38 Middle East and Africa DTaP Vaccine Market Share, By Product Type, 2024 & 2033 (%)

Figure 39 Middle East and Africa DTaP Vaccine Market Share, By Disease Type, 2024 & 2033 (%)

Figure 40 Middle East and Africa DTaP Vaccine Market Share, By Age Group, 2024 & 2033 (%)

Figure 41 Sanofi: Financials

Figure 42 GSK plc.: Financials

Figure 43 Merck & Co., Inc.: Financials

Figure 44 Serum Institute of India Pvt. Ltd.: Financials

Figure 45 Bio Farma: Financials

Figure 46 Biological E: Financials

Figure 47 Panacea Biotec: Financials

Figure 48 Walvax Biotechnology Co., Ltd.: Financials

Figure 49 Bharat Biotech.: Financials

Figure 50 MassBiologics: Financials

Figure 51 Mitsubishi Tanabe Pharma Corporation: Financials

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