

U.S. Shingles Vaccine Market Size, Share & Trends Analysis Report By Product (Shingrix, Zostavax, SkyZoster), By Vaccine Type (Recombinant Vaccine, Live Attenuated Vaccine), By End Use, And Segment Forecasts, 2025 - 2033

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Abstracts

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U.S. Shingles Vaccine Market Size & Trends

The U.S. Shingles Vaccine market size was valued at USD 3.41 billion in 2024 and is projected to register a CAGR of 10.17% during 2025 - 2033. Growth in the market is primarily driven by the expanding elderly population, increased awareness of shingles-related complications, and the broader adoption of recombinant vaccine technologies. In preventive healthcare, shingles vaccines are crucial for reducing disease burden among adults aged 50 and above, particularly those with compromised immune function. The introduction of two-dose, adjuvanted formulations has improved long-term efficacy and coverage. In addition, ongoing R&D efforts around mRNA-based shingles vaccines and improved immunization schedules continue to support uptake and market expansion.

The rising need for long-lasting protection in older adults has led to notable improvements in vaccine design, focusing on enhanced immune response and safety. Recombinant vaccines such as Shingrix have shown strong performance in clinical settings. They are widely recommended across the U.S. adult population. Newer vaccine candidates, including mRNA-based formulations, are being developed to offer simpler dosing, broader immune protection, and more efficient production timelines. These innovations are expected to strengthen the market over the coming years, especially as demand for preventive care grows.

Supportive healthcare infrastructure and public health policies also shape the U.S. shingles vaccine landscape. Federal initiatives, adult immunization campaigns, and Medicare coverage for shingles vaccination have improved access and reduced financial barriers for older adults. As the number of immunocompromised individuals rises due to cancer, organ transplants, and chronic conditions, shingles vaccination has become an essential part of clinical guidelines. In response, healthcare systems are expanding outreach, integrating adult vaccines into regular care visits, and aligning with broader public health goals.

Continued investment in R&D and product innovation is further enhancing vaccine availability. Public-private collaborations and funding support are helping accelerate clinical trials and promote the use of advanced technologies like adjuvant systems and mRNA platforms. In addition, real-world studies generate evidence of long-term efficacy, helping drive vaccine confidence and adoption. While Shingrix dominates the current U.S. market, growing global interest in shingles vaccines is reflected in new product approvals elsewhere, such as SKYZoster's approval in Malaysia in 2023. Such developments signal potential for future market expansion and competition.

The growing emphasis on adult vaccination, rising disease burden, and technological progress are expected to sustain strong growth in the U.S. Shingles Vaccine Market. The industry focuses on improving immune response, reducing dosing complexity, and expanding outreach through private and public health channels.

U.S. Shingles Vaccine Market Report Segmentation

This report forecasts revenue growth and provides an analysis on the latest trends in each of the sub-segments from 2021 to 2033. For the purpose of this report, Grand View Research has segmented the U.S. Shingles Vaccine market on the product, vaccine type, and end use:

Product Outlook (Revenue in USD Million, 2021 - 2033)

Shingrix

Zostavax

SKYZoster

Vaccine Type Outlook (Revenue in USD Million, 2021 - 2033)

Recombinant Vaccine

Live Attenuated Vaccine

End Use Outlook (Revenue in USD Million, 2021 - 2033)

Private Healthcare Settings

Government Healthcare Settings

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