

Influenza Vaccines Market, Persons Vaccinated, By Segment – Vaccine Type, Indication, Technology, Route of Administration, End-user, Geography, Company Analysis - Global Forecast (2025 - 2032)

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Abstracts

The global influenza vaccines market is projected to reach US\$ 12.16 Billion by 2032, from US\$ 7.60 Billion in 2024. Influenza is a highly communicable disease and typically has the most severe impact on children and the elderly. Influenza viruses are considered as a major cause of morbidity and mortality worldwide. According to data published by the World Health Organization (WHO) in 2023, around 3 to 5 million severe influenza cases were recorded, leading to 290,000 to 650,000 deaths across the globe. Several worldwide pharmacoeconomic studies have shown that vaccination can prevent about 50% of deaths from influenza-related complications in the elderly. The Centers for Disease Control and Prevention (CDC) recommends routine seasonal influenza vaccination for all individuals 6 months of age and older.

The vast population base together with significantly low vaccination coverage in emerging markets, the introduction of new vaccines, rising government support for immunization and growing awareness of the value of influenza vaccine in preventing disease are the prominent factors that will drive the influenza vaccines market growth. Moreover, the increasing R&D investments by leading market players, such as Sanofi, CSL Limited, and GSK plc, for expanding manufacturing capabilities and focus on launching new vaccines will propel the market for influenza vaccines over the forecast period. For instance, in March 2024, Cadila Pharmaceuticals, India launched Cadiflu Tetra Vaccine, an advanced quadrivalent influenza vaccine approved by the DCGI for adults and children. Recently, in June 2024, Moderna, Inc. announced that its Phase 3 trial for mRNA-1083, an investigational combination vaccine targeting influenza and COVID-19, has successfully achieved its primary endpoints, demonstrating a stronger

immune response compared to licensed comparator vaccines used in the study.

Recent Developments

In December 2024, The US Food and Drug Administration has granted Fast Track designation to two Sanofi combination vaccine candidates to prevent influenza and COVID-19 infections in individuals 50 years of age and older.

In September 2024, Osivax and KM Biologics Co., Ltd., announced a license option agreement granting KM Biologics an exclusive license option to develop, manufacture and commercialize Osivax's broad-spectrum "universal" influenza vaccine candidates for the Japanese market.

In July 2024, CSL Seqirus was selected by the Health Emergency Preparedness and Response Authority (HERA), part of the European Commission (EC), to provide 665,000 pre-pandemic vaccine doses for fifteen EU and EEA Member States as well as to the 'Union Civil Protection Mechanism' (rescEU).

In October 2023, BioNTech SE and Pfizer Inc. announced positive results from a Phase 1 study of mRNA-based combination vaccine for influenza and COVID-19.

By Region: Influenza Vaccines Market and Forecast – Key Takeaways

Geographically, North America is the largest market for influenza vaccines capturing over 50% share in 2024, owing to rising awareness of influenza viruses, high healthcare expenditure, and increasing research and development activities.

Europe captured second highest share of the global influenza vaccines market in 2024. In the European region, almost all countries have national and/or regional vaccination policies or strategies for seasonal influenza in place.

In United Kingdom, the flu vaccine coverage for people aged 65 years and over again remained higher than the target, resulting in four consecutive years of flu vaccine coverage at a standard espoused by the WHO.

In the 2023/2024 season, the vaccine coverage in Denmark among elderly ≥65

years was estimated at 79%.

Asia is expected to be the fastest growing market for influenza vaccines, driven by the increasing population in the Asian countries, growing focus of the governments on enhancing healthcare facilities, rising incidence of seasonal influenza, and rising disposable income.

Korea ranked highest in influenza vaccination rate in Asia at 311 vaccines per 1,000 people.

Indonesia has a low rate of influenza vaccination because immunization shots are expensive.

By Vaccine Type: Global Influenza Vaccines Market and Forecast – Key Takeaways

Inactivated vaccines held the largest market share of over 90% in 2024, and are anticipated to grow at the fastest rate over the forecast period.

The live attenuated influenza vaccines market is a growing segment within the global vaccine industry, primarily focused on vaccines designed to prevent influenza by using live, but weakened (attenuated), strains of the influenza virus.

By Indication: Global Influenza Vaccines Market and Forecast – Key Takeaways

The quadrivalent vaccines dominated the global influenza vaccines market in 2024, and is expected to grow at the fastest rate over the forecast period.

The market for trivalent influenza vaccines is facing a decline in favor of quadrivalent influenza vaccines. Trivalent vaccines remain crucial in seasonal influenza vaccination programs, especially in areas with limited resources and vaccine access.

By Technology: Global Influenza Vaccines Market and Forecast – Key Takeaways

Egg-based vaccines accounted for highest share of the global influenza vaccines market in 2024. Egg-based vaccine production has been a

longstanding and well-established method in the industry. Several vaccine manufacturers have invested heavily in egg-based infrastructure, making it a widely adopted and reliable production method.

Cell-based influenza vaccines are an alternative to the traditional egg-based vaccines, offering several advantages in terms of speed, efficiency, and safety.

By Route of Administration: Global Influenza Vaccines Market and Forecast – Key Takeaways

The injection segment held the largest market share in 2024. Healthcare payers prefer injection over nasal sprays due to better data on safety, efficacy, and cost-effectiveness with decades of use.

Nasal spray influenza vaccines offer an alternative to injections, providing a non-invasive and needle-free administration option. The increasing adoption of nasal spray or intranasal vaccines at homecare settings, ease of self-administration, and ability of nasal spray to induce systemic as well as mucosal immunity drives the segment growth.

By End User: Global Influenza Vaccines Market and Forecast – Key Takeaways

Hospitals & pharmacies captured largest revenue share of over 50% in 2024. Hospitals & pharmacies are widely accessible to the general population. These healthcare settings benefit from established infrastructure along with the presence of trained healthcare professionals, collaboration with public health campaigns, and insurance coverage.

Government & institutional supply is expected to be the fastest-growing segment over the coming years. Ongoing vaccination and immunization programs and the inclusion of influenza vaccines in vaccination programs worldwide are responsible for high growth of this segment.

Global Influenza Vaccines Market - Company Analysis

GSK's influenza vaccines sales declined in 2024, driven by competitive

pressure and volume phasing in the US and lower demand across other regions.

In 2023, Sanofi net sales of influenza vaccines declined by 10%, due to a slight reduction in vaccine uptake and increased competition in the United States.

In December 2024, The US Food and Drug Administration has granted Fast Track designation to two Sanofi combination vaccine candidates to prevent influenza and COVID-19 infections in individuals 50 years of age and older.

iGATE Research report titled “Influenza Vaccines Market, Persons Vaccinated, Segment Analysis – By Vaccine Type (Inactivated, Live Attenuated), Indication (Quadrivalent, Trivalent), Technology (Egg-based, Cell-based), Route of Administration (Injection, Nasal Spray), End-user, By Geography, Key Company Analysis, Emerging Players Profile, Influenza Vaccines in Clinical Development, Major Deals and Recent Developments - Global Forecast (2025 – 2032)” provides a comprehensive assessment of the fast-evolving, high-growth influenza vaccines market landscape.

This 388 Pages report with 172 Figures and 17 Tables has been analyzed from 13 viewpoints:

1. Global Influenza Vaccines Market, Persons Vaccinated and Forecast (2016 – 2032)
2. By Region - Influenza Vaccines Market, Persons Vaccinated and Forecast (2016 – 2032)
3. Country Wise Distribution - Influenza Vaccines Market, Persons Vaccinated and Forecast (2016 – 2032)
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12. Global Influenza Vaccines Market – Recent Developments

13. Global Influenza Vaccines Market - Driving Factors and Challenges

By Region - Influenza Vaccines Market, Persons Vaccinated and Forecast

1. North America

2. Latin America

3. Europe

4. Asia

5. Australasia

Country Wise Distribution - Influenza Vaccines Market, Persons Vaccinated and Forecast

1. United States

2. Canada

3. Brazil

4. Mexico

5. Germany

6. France

7. Italy

8. Spain
9. United Kingdom
10. Netherlands
11. Ireland
12. Denmark
13. Luxembourg
14. Sweden
15. Finland
16. Belgium
17. Poland
18. Norway
19. Australia
20. New Zealand
21. Japan
22. China
23. India
24. South Korea
25. Singapore
26. Hong Kong

27. Malaysia

28. Thailand

29. Indonesia

By Vaccine Type - Global Influenza Vaccines Market and Forecast

Inactivated Influenza Vaccines

Live Attenuated Influenza Vaccines

By Indication - Global Influenza Vaccines Market and Forecast

Quadrivalent Influenza Vaccines

Trivalent Influenza Vaccines

By Technology - Global Influenza Vaccines Market and Forecast

Egg-based Influenza Vaccines

Cell-based Influenza Vaccines

By End User - Global Influenza Vaccines Market and Forecast

Hospitals & Pharmacies

Government & Institutional Supply

Others

Influenza Vaccines Market – Key Company Analysis

1. GlaxoSmithKline (GSK)

2. Sanofi

3. CSL Seqirus

4. AstraZeneca

5. Gamma Vaccines Pty Ltd.

6. Hualan Bioengineering Co., Ltd

7. Viatris Inc.

8. BioDiem Ltd

9. Shanghai Institute of Biological Products Co., Ltd.

Influenza Vaccines Market – Emerging Players Profile

1. Novavax

2. Moderna Inc.

3. Pneumagen Ltd

4. Daiichi–Sankyo

5. FluGen

6. Imutex

7. EpiVax

8. Versatope Therapeutics, Inc.

9. BIKEN Co., Ltd.

10. Sinovac Biotech

11. Emergent BioSolutions

12. Osivax

13. Gylden Pharma Limited (Previously Emergex Vaccines)

14. Vir Biotechnology, Inc.

Data Sources

iGATE RESEARCH employs rigorous primary and secondary research techniques in developing distinctive data sets and research material for business reports. This report is built by using data and information sourced from Proprietary Information Database, Primary and Secondary Research Methodologies, and In house analysis by iGATE Research dedicated team of qualified professionals with deep industry experience and expertise.

Research Methodologies

Primary Research Methodologies: Questionnaires, Surveys, Interviews with Individuals, Small Groups, Telephonic Interview, etc.

Secondary Research Methodologies: Printable and Non-printable sources, Newspaper, Magazine and Journal Content, Government and NGO Statistics, white Papers, Information on the Web, Information from Agencies Such as Industry Bodies, Companies Annual Report, Government Agencies, Libraries and Local Councils and a large number of Paid Databases.

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