

# **Australia Pneumococcal Vaccine Market Assessment, By Type of vaccine [Live attenuated vaccine, Inactivated vaccine and Subunit vaccine], By Adjuvant [Adjuvanted and Non-adjuvanted], By Route of Administration [Intramuscular, Subcutaneous, Intradermal, Others], By Age group [Infants, Children and Adult], By End-user [Hospitals, Specialty clinics, Homecare, Others], By Distribution Channel [Hospital, Retail Pharmacy, Online Pharmacy Government, Non-Governmental Organisations], By Region, By Opportunities and Forecast, 2016-2030F**

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## **Abstracts**

Australia Pneumococcal Vaccine Market size was valued at USD 146.21 million in 2022, expected to reach USD 189.13 million in 2030 with a CAGR of 3.27% for the forecast period between 2023 and 2030. The Australia pneumococcal vaccine market is experiencing robust growth driven by multiple factors, including an increased awareness of vaccination programs, a rise in pneumococcal disease incidences, and a growing elderly population particularly susceptible to severe infections. Moreover, governments and international health organizations are actively improving immunization programs and implementing initiatives to alleviate the burden of pneumococcal diseases.

The Australia pneumococcal vaccine market is marked by its dynamic nature, fuelled by ongoing advancements in vaccine research and development, evolving disease patterns, and the collaborative efforts of pharmaceutical companies and healthcare organizations. Moreover, government initiatives that promote vaccination and growing

public awareness about the significance of preventive measures have contributed to the market's continuous growth and expansion. Over the past few years, the Australia pneumococcal vaccine market has experienced significant progress, marked by strategic partnerships, mergers, and acquisitions among prominent industry players. These alliances seek to leverage cutting-edge technologies, diversify product portfolios, and enhance vaccine distribution networks, ultimately leading to broader accessibility and improved healthcare outcomes for the population.

In this highly competitive environment, domestic and international vaccine manufacturers actively strive to bring forth novel and enhanced pneumococcal vaccines. This innovation climate fosters a strong emphasis on improving vaccine efficacy, minimizing side effects, and targeting emerging pneumococcal serotypes, effectively tackling the ever-changing healthcare challenges in the country.

### Rise in Pneumococcal Disease Incidence

Pneumonia substantially burdens Australian children, with an incidence ranging from 5 to 8 cases per 1000 person-years. It stands as a leading cause of hospital admissions among children under the age of 5 years. Indigenous children face a specific vulnerability, experiencing a significantly higher risk of hospitalization, up to 10-20 times greater than non-indigenous children. Moreover, their hospital stays tend to be longer, and they are more prone to multiple admissions due to pneumonia. While data on pathogen-specific causes of pneumonia is limited, *Streptococcus pneumoniae* stands out as the most common bacterial cause in children under five years of age, while respiratory syncytial virus (RSV) and influenza are the prevailing viral causes in young children. The rise in pneumococcal disease incidence is directly linked to growth in the Australia pneumococcal vaccine market.

### Market is Being Propelled by Technological Advancements

The Australia pneumococcal vaccine market has undergone a transformative journey in recent years, propelled by noteworthy technological advancements. These advancements, achieved through a synergy of pioneering research, state-of-the-art technologies, and collaborative endeavours between pharmaceutical companies and healthcare organizations, have ushered in a new vaccine development and distribution era. Technological advancements have played a critical role in expediting vaccine research, leading to a deeper understanding of disease-causing pathogens and facilitating the development of targeted vaccines to address emerging serotypes.

For instance, in November 2022, in collaboration with the University of Adelaide, the South Australian biotech company GPN Vaccines successfully created a novel, universal vaccine targeting the lethal, *Streptococcus pneumoniae*. In January 2023, a clinical trial was initiated at CMAX, a prominent clinical trial center in Adelaide, to evaluate the effectiveness of the Gamma-PN vaccine. The trial involves participants aged between 50 and 69, with subsequent research being conducted at the University of Adelaide for further assessment.

### Government initiatives

To encourage pneumococcal vaccination, the government has implemented several initiatives, such as: Through the National Immunisation Program, the Australian government offers free pneumococcal vaccines to eligible groups, every year. For example, infants are given the 13-valent pneumococcal conjugate vaccine (PCV13) as part of their routine immunization schedule. The National Immunisation Program offers two types of free pneumococcal vaccines tailored to different age groups and situations: Children can receive three doses of the pneumococcal vaccine under the National Immunisation Program at 2, 4, and 12 months of age. In addition to these three doses, Aboriginal and Torres Strait Islander children residing in Queensland, Northern Territory, Western Australia, or South Australia receive an extra dose at 6 months (totalling four doses). Moreover, children under 12 months with specific medical conditions and increased vulnerability to pneumococcal severe disease can receive up to six vaccine doses over several years. These initiatives taken by the Australian government have aided in the growth of Australia pneumococcal vaccine market.

### The Demand for Pneumococcal Conjugate Vaccine is on the Rise

Increasing demand for pneumococcal conjugate vaccine is highly responsible for the growth of Australia pneumococcal vaccine market. There are three different types of pneumococcal conjugate vaccines, each recommended for specific groups based on their age and medical condition. Your healthcare provider can assist in determining the appropriate vaccine type and the number of doses you should receive. It is usually recommended for infants and young children to receive four doses of the pneumococcal conjugate vaccine at ages 2, 4, 6, and 12-15 months. Older children and adolescents may require the vaccine depending on their age, medical history, or if they missed the recommended doses during infancy. Adults aged 19 to 64 with certain medical conditions or other risk factors should receive the pneumococcal conjugate vaccine if they have not been vaccinated. Similarly, adults aged 65 years or older who have not previously received the vaccine should also get vaccinated.

In June 2023, a phase 3 study was conducted to test for the safety and tolerability of VAXNEUVA NCE (V114) in infants. It is a novel 15-valent pneumococcal conjugate vaccine specifically developed to safeguard against prominent emerging serotypes developed by Merck & Co., Inc., an American multinational pharmaceutical company.

### Pneumococcal Vaccine for Adults Gaining Momentum

In recent years, there has been a notable upswing in the uptake of pneumococcal vaccines among adults, signifying a growing momentum in the preventive healthcare landscape, leading to a significant growth in Australia pneumococcal vaccine market. With increasing awareness of the importance of vaccination in reducing the risk of severe pneumococcal infections, adults are more willing to protect themselves against this potentially life-threatening disease. Healthcare providers and authorities are actively promoting adult vaccination, highlighting the benefits of immunization and its role in safeguarding individuals and communities. As the momentum for pneumococcal vaccination gains traction, it paves the way for improved public health outcomes and a significant reduction in the burden of pneumococcal diseases in the adult population. The estimated coverage for pneumococcal vaccines in high-risk adults under 65 was 24%, while for adults aged 65 and over, it was 53%. Surprisingly, almost half of those under 65 had never heard of the pneumococcal vaccine, and among adults aged 65 and over, 26% reported not know the vaccine.

### Impact of COVID-19

COVID-19 has had a significant impact on Australia pneumococcal vaccine market. Amid the pandemic, some individuals were reluctant to visit healthcare facilities due to concerns about COVID-19 exposure. Consequently, this hesitation impacted the overall pneumococcal vaccination uptake among the population. The pandemic significantly burdens healthcare facilities, primarily directed toward responding to COVID-19. This shift in resource allocation had a noticeable impact on routine vaccination services, including the administration of pneumococcal vaccination. Lockdowns and movement restrictions restricted people's access to vaccination services and diminished healthcare providers' capacity to administer vaccines. Although, the uptake of the 13-valent pneumococcal conjugate vaccine (dose 2, scheduled at four months of age) in young children showed no significant impact from either stage 3 or stage 4 lockdown restrictions.

### Key Players Landscape and Outlook

Over the past few years, the pneumococcal vaccine market in Australia has experienced a notable increase in mergers and acquisitions, resulting in substantial changes in the industry's outlook. With the rising demand for pneumococcal vaccines driven by heightened awareness and the emphasis on immunization, pharmaceutical firms are proactively pursuing strategic alliances to bolster their market presence and diversify their product offerings. Major stakeholders in the Australian pneumococcal vaccine market are actively involved in mergers and acquisitions to acquire advanced technologies, innovative vaccine formulations, and broader market coverage.

These collaborations are transforming the competitive dynamics and fuelling innovation in vaccine development, potentially paving the way for significant advancements in preventing and managing pneumococcal infections. As an example, in October 2021, Merck & Co., Inc., disclosed a settlement and licensing agreement with Pfizer Inc., an American multinational pharmaceutical and biotechnology corporation, concerning MSD's pneumococcal conjugate vaccine (PCV) products, which include VAXNEUVANCETM (Pneumococcal 15-valent Conjugate Vaccine).

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\*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work

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