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India Influenza Vaccine Market Assessment, By Type of Vaccine [Inactivated Influenza Vaccine, Live Attenuated Influenza Vaccine], By Type of Influenza [Seasonal and Pandemic], By Formulation [Trivalent, Quadrivalent], By Technology [Egg-based, Cell culture and Recombinant], By Age group [Paediatric and Adult], By Route of Administration [Intra-muscular injection, Nasal Spray], By Distribution Channel [Hospital, Retail Pharmacies, Government Suppliers and Others], By Region, By Opportunities and Forecast, 2017-2031F

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Abstracts

India Influenza Vaccine market size was valued at USD 0.83 billion in FY2023 which is expected to reach USD 1.52 billion in FY2031 with a CAGR of 7.83% for the forecast period between FY2024 and FY2031. The drivers fuelling the growth of the influenza vaccine market in India include the high prevalence of influenza, increased government attention on immunization programmes, newly developed vaccines, and technological advancements in vaccine administration.

The market for influenza vaccines in India has grown and expanded significantly in recent years. Flu vaccines are now increasingly being produced domestically, which has enhanced their accessibility and availability in the nation. Influenza vaccination has also been vigorously promoted by the Indian government and private healthcare providers as a component of preventative healthcare efforts. In India, there are many ways to get an influenza vaccination, including through government immunization programmes, private

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healthcare institutions, hospitals, clinics, and pharmacies.

Healthcare providers, elderly individuals, expectant mothers, children aged from 6 months to 5 years of age and those with underlying medical issues are the groups that are most at risk from the flu. Given their propensity for influenza-related morbidity and mortality, the Ministry of Health and Family Welfare (MoHF W), the World Health Organisation (WHO), and the Centre for Disease Control (CDC) have all recommended annual influenza vaccine for all high-risk populations.

Increasing Number of Influenza Patients

As per MoHFW, 436,523 cases of influenza-like illness were reported in India, till February 2023. Each year, influenza spreads in a way that is not easy to keep track of, but it leads to the development of some level of immunity among individuals. However, due to the pandemic, people adopted preventive measures such as wearing masks, avoiding crowded areas, and refraining from gatherings. As a result, the spread of influenza was effectively hindered, leading to a significant population of individuals with reduced immunity. Hence, there is an increase in the number of influenza cases post-COVID. Additionally, changing nature of flu virus also causes an increase in the number of flu cases usually every other year. The annual flu shot is not widely accessible in government organizations, and its uptake is low. Due to a lack of knowledge, limited availability, and high costs, influenza vaccinations are not widely used in India. The annual flu shot is not covered by the government's universal immunization p rogramme, which covers other vaccination such as polio, tuberculosis, and Hepatitis B.

Technological Advancements

Technological advancements in the Indian influenza vaccine market are playing a significant role in improving the prevention and control of influenza outbreaks. Innovative approaches such as recombinant vaccines, integration of artificial intelligence & machine learning and robotic process automation are being increasingly adopted. These advancements have led to the development of more effective and efficient vaccines. One such technological advancement is the use of recombinant influenza vaccinations. In the event of a pandemic or during scarcity of the eggs required to develop influenza viruses, the production proc edure for recombinant vaccines may be quicker than that for vaccines based on eggs because it is not dependent on an egg supply. Use of advanced AI technologies can accelerate the development of influenza vaccine. Such technologies remain in the early development phases.

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For instance, Novavax, an American biotechnology company, launched Covid-influenza combination (CIC) vaccine with Serum Institute of India as its manufacturing partner, in 2021. Novavax announced that it has successfully completed phas e 2 clinical trial of its new formula of CIC vaccine in May 2023. The new formula of influenza vaccine is designed using AI technology.

Government Initiatives

In March 2023, the union government advised states and union territories to increase community awareness regarding the importance of maintaining proper respiratory and hand hygiene following the increase in Influenza A type H3N2 cases across the country. The Centre also instructed the state units of the Integrated Disease Surveillance Programme (IDSP)’s to maintain vigillance, monitor cases of severe acute respiratory diseases and influenza-like illnesses, and refer enough samples for testing for influenza, SARS CoV-2 and adenovirus. Rajesh Bhushan, Secretary of MoHFW sent a letter to the states and union territories after a review meeting with NITI Ayog, acknowledging the rapid increase in ILI (Influenza like Illness)/SARI (Severe Acute Respiratory Illnesses) across the nation. Integrated sentinel-based surveillance of ILI and SARI has detected an increase in influenza A cases during the second half of December 2022.

Initiatives are being taken for pregnant women, elderly and children below the age of five and immune-compromised people with conditions like Asthma, diabetes, and COPD to administer the latest recommended strain of influenza vaccine, every year. One such initiative was taken by Maharash tra government in 2021, the state Covid taskforce and pediatric taskforce jointly immunized every child with influenza vaccine before the monsoon.

Rising Demand for Quadrivalent Flu Vaccine

Two influenza A viruses and two influenza B viruses are among the four flu viruses that a quadrivalent vaccine is intended to protect against. Even though there are two different lineages of influenza B viruses that circulate during most seasons, flu vaccinations were long meant to protect against three different flu viruses: the influenza A(H1N1), influenza A(H3N2), and one influenza B virus. The seco nd lineage of the influenza B virus was added to provide greater defence against circulating flu viruses. This way, a quadrivalent vaccine provides protection against a broad spectrum of flu viruses. The quadrivalent flu vaccine offers a broader protection against multiple strains of the influenza virus. Compared to the traditional trivalent vaccine, the quadrivalent

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vaccine covers an additional strain, providing enhanced immunity. This added protection is particularly significant in a country as diverse as India, where multiple strains of the virus can co-circulate.

For instance, Abbott, launched a quadrivalent vaccine for influenza in India in February 2020. It is the only 0.5 ml quadrivalent flu vaccine that has been allowed to be used in children up to 3 years of age.

Increasing Demand of Paediatric Influenza Vaccines

Due to the increased number of influenza cases, various national and international bodies like MoHFW and WHO has recommended the administration of influenza vaccine with SH strains in children. Vaccination should be offered annually to all children aged 6 months to 5 years, regardless of their health status. Children with certain medical conditions, such as asthma, heart disease, or weakened immune systems, should be given priority for influenza vaccination. Two doses of influenza vaccine may be required for children aged 6 months to 8 years who are receiving influenza vaccination for the first time. The doses should be administered at least four weeks apart. Inactivated i nfluenza vaccines (IIV) or live attenuated influenza vaccines (LAIV) can be used in children, depending on the availability and the child's health condition. However, LAIV should not be administered to children with certain underlying medical conditions or those who are immunocompromised. Fluarix Tetra (2022 -2023 formula), developed by GSK, is an inactivated vaccine that can be safely administered in children.

Impact of COVID-19

The pandemic had disrupted global supply chains, including the production and distribution of influenza vaccines. Manufacturers have faced challenges in sourcing raw materials and ensuring timely delivery, which has resulted in supply shortages and distribution delays in the Indian market. The onset of the pandemic led to a surge in demand for flu vaccines in India. As per private hospitals such as Apollo Hospitals and Fortis Healthcare, the demand for flu vaccinatio ns increased, including Abbott India's imported vaccine, Influvac. Abbott India revealed in its annual report that the financial year ending in March 2021, witnessed a significant increase of 42.3% in sales within its vaccine division, primarily driven by the surge in demand for the influenza prevention vaccine. Despite the challenges posed by the COVID-19 pandemic, the long-term outlook for the influenza vaccine market in India remains positive. The increased awareness of respiratory illnesses and the importance of vaccinations is likely to drive

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sustained demand for influenza vaccines. Moreover, efforts to strengthen the healthcare system and improve vaccine accessibility are expected to support the market's growth.

Key Players Landscape and Outlook

Pharmaceutical companies are engaging in mergers and acquisitions, joint ventures, and extensive collaborations for the manufacturing of combination vaccines. The dominant market players are aiming to combine their coronavirus vaccines with annual flu shots. India has emerged as a major manufacturing hub of influenza vaccines. Pfizer India and Apollo hospitals declared their partnership to establish a center of excellence focused on adult vaccination on 29th May 2023. The collaboration aims to provide immunization against a range of vaccine-preventable illnesses, including pneumococcal disease, Hepatitis A & B, human papillomavirus (HPV), influenza, and other similar conditions.

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