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India 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, FY2017-FY2031

https://marketpublishers.com/r/IF08EF874719EN.html
Date: February 2025
Pages: 127
Price: US$ 3,300.00 (Single User License)
ID: IF08EF874719EN

Abstracts

India Pneumococcal Vaccine Market size was valued at USD 792.13 million in FY2023 which is expected to reach USD 1280.75 million in FY2031 with a CAGR of 6.19% for the forecast period between FY2024 and FY2031. The expansion of the Indian pneumococcal vaccine market can be attributed to several contributing factors that encompass increased awareness about vaccination programs, a rise in pneumococcal disease incidences, and the growing elderly population, which is especially susceptible to severe infections. Moreover, the market has received significant support from proactive efforts by governments and international health organizations, who have extended immunization programs and implemented initiatives to address the challenges posed by pneumococcal diseases.

India has taken proactive measures to counter the increasing menace of pneumococcal diseases by actively expanding its immunization program, with a specific emphasis on

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the nationwide introduction of pneumococcal vaccines. The primary objective is to alleviate the burden of preventable diseases and enhance overall health outcomes, particularly for the most vulnerable age groups. India pneumococcal vaccine market has been greatly influenced by increasing awareness on the significance of vaccination in preventing pneumococcal diseases, which has been on rise among both, the general public and healthcare professionals.

With India's ageing population, the elderly demographic has become particularly vulnerable to severe pneumococcal infections. Consequently, there has been a substantial increase in the demand for pneumococcal vaccines to address this need, resulting in the growth of the Indian pneumococcal vaccine market.

Development of an Indigenous Vaccine

The endeavour to develop an indigenous pneumococcal vaccine is a strategic step towards bolstering India's self-reliance in vaccine production and accessibility, which will eventually lead to the growth of India pneumococcal vaccine market. By diminishing reliance on imports and foreign technologies, India aims to achieve wider vaccine coverage and affordability, thereby ensuring that a larger portion of the population can receive protection against pneumococcal diseases through immunization. Furthermore, this undertaking demonstrates India's capability to make valuable contributions to global health endeavours. An Indigenous pneumococcal vaccine has the potential to extend beyond India's borders, providing benefits to other nations grappling with similar health challenges.

For instance, in December 2020, the Serum Institute of India, headquartered in Pune and renowned as the world's largest vaccine manufacturer in terms of doses, unveiled a groundbreaking achievement. They proudly introduced Pneumosil, India's first pneumococcal vaccine developed entirely within the country. The momentous event took place in the presence of Union Health Minister Harsh Vardhan.

Launching of New Immunisation Campaigns

Pneumonia is a challenging respiratory illness, which has emerged as a significant worry for the nation, especially among children in underdeveloped regions. New immunization campaigns have greatly contributed to India’s pneumococcal vaccine market. To address this issue, the Indian government, in collaboration with key stakeholders and healthcare organizations, has initiated a series of innovative strategies and campaigns focused on preventing, protecting, and treating pneumonia. These

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timely initiatives reflect a shared dedication to alleviating the impact of pneumonia-related fatalities and improving the overall health of the population.

For instance, as part of the 'Azadi ka Amrit Mahotsav' initiative, the Government of India took a momentous step on October 29, 2021, by commencing the nationwide expansion of the pneumococcal conjugate vaccine (PCV) through the Universal Immunization Programme (UIP). To mark this significant milestone, health officials from across the country participated in a celebratory launch event, presided over by the Union Health Minister.

Government Initiatives

In response to the pressing concern and to alleviate the impact of pneumonia-related illnesses and fatalities, the Indian government has instituted multiple initiatives centered on pneumonia vaccination. Ensuring fair distribution and accessibility of vaccines, the government engages in partnerships with international organizations, non-governmental agencies, and vaccine manufacturers to acquire vaccines at affordable rates. This collaborative endeavor holds significant importance in ensuring that pneumonia vaccination is within reach for low- and middle-income communities across the nation.

In November 2020, the Ministry of Health and Family Welfare (MoHFW) in India targeted to reduce under-five age group deaths to, 3 per 1000 lives by 2025 through the accelerated SAANS initiative. The SAANS (Social Action and Awareness to Neutralise Pneumonia Successfully) campaign, launched in 2019, complements the National Childhood Pneumonia Management Guidelines and adopts a three-pronged approach to Protect, Prevent, and Treat Pneumonia among children. To support this endeavor and alleviate the burden of pneumonia on the country, Save the Children, UNICEF, and CHAI have partnered with the Ministry. All these government initiatives have contributed to the significant growth of India’s pneumococcal vaccine market.

Increasing Demand for Pneumococcal Conjugate Vaccine

The administration of PCV (Pneumococcal Conjugate Vaccine) has proven effective in reducing both the frequency and severity of pneumonia and other lower respiratory infections in children. To ensure maximum protection, it is crucial for children to receive all the recommended doses according to the vaccine schedule. It is important to note that vaccination is not intended to be utilized as a treatment for active infections. Instead, its primary purpose is to prevent infections from occurring in the first place and safeguard children's health. For instance, NucoVac-11, a new pneumococcal conjugate

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vaccine, is currently in the pipeline of Panacea Biotec, an Indian multinational global generic and specialty pharmaceutical and vaccine maker.

Non-governmental Organizations are Greatly Involved in the Immunisation Process

For India, tackling pneumococcal diseases, including pneumonia, has been a longstanding health challenge, particularly for vulnerable communities. However, in response to this critical issue, dedicated non-governmental organizations (NGOs) have risen to the occasion, aiming to fill the gaps in healthcare services and ensure the equitable distribution of the pneumococcal vaccine to those in need. These NGOs operate with a strong commitment to enhance the well-being of children and communities by providing essential immunization services and actively supporting vaccination campaigns. Their efforts are in sync with national health objectives, complementing the government's initiatives to combat pneumococcal infections and reduce associated fatalities. Leveraging innovative approaches, collaborative partnerships with healthcare providers, and associations with international agencies, these NGOs have achieved remarkable success in expanding vaccine coverage and promoting preventive healthcare initiatives across the nation.

Impact of COVID-19

Amidst the pandemic, vaccine deliveries faced challenges due to supply-side limitations such as vaccine and supply shipment delays, staff shortages, and disruptions in vaccination campaigns. Despite these hurdles, India managed to achieve a remarkable feat by successfully rolling out PCV (pneumococcal conjugate vaccine) to the entire nation in just approximately 7 months, unlike other countries that faced similar struggles. Therefore, it is vital to identify the key factors that contributed to this successful nationwide scale-up of PCV, even amidst the ongoing COVID-19 pandemic and the challenges it posed to the healthcare system.

The critical elements that played a crucial role in achieving the widespread implementation of PCV in the country during those difficult times were t provisioning of PCV procurement through the domestic budget, prompt response from the leaders to address the unprecedented challenges presented by the pandemic and its associated restrictions, development of an indigenous pneumococcal vaccine, implementing innovative training and digital tools and valuable support provided by the well-established and sustainable ecosystem of partners and stakeholders in the field of immunization.

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Key Players Landscape and Outlook

There has been a notable paradigm shift in the Indian pneumococcal vaccine industry, with an increasing trend of mergers and collaborations among various stakeholders. Amidst this dynamic landscape, partnerships in the Indian pneumococcal vaccine industry have manifested in diverse forms, encompassing collaborations between Indian pharmaceutical companies, international-indigenous alliances, and public-private partnerships involving government bodies, industry players, and non-profit organizations.

For instance, in May 2023, Kangtai Biological Products formed a partnership with a prominent Indian drug manufacturer to distribute and market the Chinese vaccine maker's 13-valent pneumococcal conjugate vaccine in India. Unit Minhai Biotech entered into a licensing agreement with an undisclosed Indian drug manufacturer, which happens to be one of the oldest and largest pharmaceutical companies in India. The Indian firm boasts 26 subsidiaries and an extensive network of over 2,000 distribution centers.

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