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Influenza Vaccine Market Assessment, By Vaccine Type [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, 2016-2030F

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Abstracts

Global Influenza Vaccine Market size was valued at USD 8.02 billion in 2022 which is expected to reach USD 11.78 billion in 2030 growing with a CAGR of 4.92% for the forecast period between 2023 and 2030. The drivers fuelling the growth of the worldwide influenza vaccine market include the high prevalence of influenza, increased government attention on immunization programmes, newly developed vaccines, and technological advancements in vaccine administration. The influenza epidemics are responsible for 2,90,000 to 6,50,000 respiratory deaths and 3 to 5 million cases of severe illness globally each year. The annual global attack rate for influenza is estimated to be 5–10% in adults and 20–30% in children. The elderly, expectant mothers, small children, and those with underlying medical issues are the groups that are highly susceptible to flu.

Twice a year, new flu vaccines are manufactured for the winter season in each

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hemisphere. This frequency is necessary due to the rapid mutation of the virus and changes in circulation patterns between consecutive winter seasons, which causes the effectiveness of previous vaccinations to diminish. Owing to the mutated new strains of influenza in circulation, particularly in northern and southern hemispheres, numerous seasonal influenza vaccines are reformulated each year. Hence, despite the immunity developed in patients due to older generation of vaccines, patients are required to vaccinated with reformulated versions each year to enhance immune response, thereby contributing to the demand for new reformulated vaccines and market growth.

The best method of preventing illness and serious consequences brought on by influenza viruses is vaccination. To create a unified strategy for the development of influenza vaccines, including their efficient use and distribution, production, testing, and regulatory control, World Health Organization (WHO) has been working with scientists and policymakers on a worldwide scale for more than 50 years.

Increasing Demand from Developing Countries

According to WHO, developing nations account for 99% of lower respiratory tract infection-related mortality in children under the age of five. Seasonal influenza can have a significant direct or indirect negative impact on both health and the economy. It can cause high rates of absence from work, productivity loss, and a heavy demand on healthcare systems, which can affect hospital capacity and medical expenditures. Many low and middle-income countries (LICs and MICs) lack accurate statistics on the disease burden caused by seasonal influenza, even though research indicates that these nations are like ly to have the largest burden of influenza among children and other populations at risk.

For instance, after receiving market authorization for the trivalent seasonal influenza vaccine developed by the Serbian Institute of Virol ogy, Vaccines and Sera- Torlak in August 2020, Serbia's efforts to establish and maintain domestic vaccine production has helped in ensuring the nation has a reliable and independent supply of influenza vaccines.

Development of New Vaccines Driving the Market

Although the strains of the currently available vaccines closely match the strains of the influenza virus in circulation, these vaccines usually provide only 40%-60% protection, with considerably lower protection in years due to insufficient strain matching. Since the strains chosen for the vaccine are selected six months prior to the inception of the

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influenza season that they are meant to combat, it is challenging for global health experts to determine which strains would be the best match for the upcoming season. Better strain matching may be possible in the future owing to mRNA technology's adaptability and faster production. Further, in event of a pandemic, influenza or outbreak, mRNA technology can help in faster mass production of vaccinations as mRNA-based influenza vaccines need the virus' genetic makeup.

For instance, Pfizer, one of the w orld’s premier biopharmaceutical companies, initiated phase 3 study of single dose m-RNA based influenza vaccine in September 2022. With only the genetic makeup of the viruses required, mRNA-based vaccinations can be produced more quickly and with greater flexibility, potentially improving strain matching and the efficacy of current flu vaccines.

Government Initiatives

Governments around the globe are taking several initiatives to ensure the widespread availability and administration of influenza vaccines. These efforts are aimed at protecting public health and minimizing the impact of seasonal flu outbreaks. Some of the notable initiatives being taken by governments are vaccine production and distribution, surveillance and monitoring, vaccination programs, R&D and public awareness campaigns.

For instance, on 24th April 2023, Australian Government’s Department of Health and Aged Care, launched an 8-week public awareness campaign under the National Immunization Program (NIP) to help and educate the people about the serious consequences of influenza. It is crucial for those who are more likely to experience difficulties from the flu, such as pregnant women and their unborn children, kids between the ages of 6 months to 5 years, and members of first nations communities.

Recombinant Vaccines Offers Clinical Advantage for Geriatric Patients

The recombinant flu vaccine is among the top three vaccines recommended specifically for individuals aged 65 and above. This preference is due to the reason that these vaccines demonstrate higher efficacy compared to standard dose unadjuvanted flu vaccines in this age group. In the event of a pandemic or during scarcity of the eggs required to develop influenza viruses, the production proc edure for recombinant vaccines is quicker than that for vaccines based on eggs because it is not dependent on an egg supply. The choice of vaccine viruses that are adapted for growth in eggs does not impose any restrictions on recombinant method.

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For instance, Flublok Quadrivalent, developed by Sanofi Pasteur Inc., a recombinant flu shot is available for the 2022-2023 influenza season. It is recommended for active immunization against illness brought on by the type B and influenza A subtype viruses and can be used by those who are at least 18 years old.

Increasing Adoption of Inactivated Influenza Vaccines

Inactivated influenza vaccine is crucial in managing the spread of flu virus. These vaccines are made from dead strains of flu virus and are considered highly effective. One of the most important benefits of this vaccine is the safety of the recipient's health. Since the virus strains used in the creation of this vaccine are dead, hence it is incapable of causing a flu infection.

This makes inactivated vaccines suitable for people at a higher risk of serious complications, such as pregnant women, people with compromised immune system and children. Each year , a trivalent influenza vaccine is developed based on the influenza viruses expected to be common during the upcoming flu season. This medication can be prepared for injection or intranasal use.

For instance, Fluarix (2022-2023 formula), developed by GSK, is a trivalent inactivated influenza vaccine. It is a synthetic vaccine consisting of three inactivated influenza viruses, two different influenza type A strains and one influenza type B strain.

Impact of COVID-19

As per UNICEF (United Nations International Children's Emergency Fund), the glo bal demand for influenza vaccine has increased due to the COVID-19 pandemic. To ensure that countries receive the influenza vaccines in a timely manner and in sufficient quantities, a supply document has been issued. This document addresses crucial concerns related to the vaccine production process, procurement and supply information. The delivery of medical services around the world was hampered by the COVID-19 pandemic. Due to the 2019–2020 seasonal flu in the Northern Hemisphere and COVID–19 in the Southern Hemisphere, there has been an increase in the occurrence of coinfections, which has resulted in worse outcomes and excess mortality. Influenza vaccination reduced the occurrence of COVID-19 cases, hospitalizations, admissions to critical care units, and COVID-19-related mortality. By reducing the burden of influenza disease and enhancing the distinction between influenza and COVID-19—two diseases with similar signs and symptoms—influenza vaccination can

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thereby reduce the demand on healthcare resources brought on by the COVID-19 pandemic.

Key Players Landscape and Outlook

Pharmaceutical companies are engaging in mergers and acquisitions, joint ventures, and extensive collaborations for the manufacturing of influenza vaccines. The dominant market players are aiming to combine their coronavirus vaccines with annual flu shots. Furthermore, executives representing various vaccine manufacturers have expressed their expectations of a gradual transformation of the COVID-19 vaccine market to resemble the industry dynamics observed in the flu vaccine sector.

In November 2022, Pfizer Inc. and BioN Tech SE announced the advancement of an mRNA-based combination vaccine candidate for influenza and COVID-19 to a Phase 1 trial with the aim to treat two serious respiratory diseases with a single vaccination.

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