

Saudi Arabia 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

Saudi Arabia Influenza Vaccine Market size was valued at USD 76.15 million in 2022 which is expected to reach USD 140.22 million in 2030 with a CAGR of 7.93% for the forecast period between 2023 and 2030. Several factors that play a significant role in driving the Saudi Arabia influenza vaccine market are awareness of the severity of the disease, recommendations from doctors, previous experiences with influenza, increase in the pharmaceutical infrastructure, belief in the effectiveness of vaccines in providing protection, and adherence to local and global recommendations.

Acknowledging the significance of influenza vaccination in curbing the virus's transmission and alleviating strain on the healthcare system, the government of Saudi Arabia has prioritized the promotion of influenza vaccination campaigns throughout the nation. The government's unwavering commitment to these initiatives highlights their dedication to public health and preventive measures against influenza, which ultimately

paves the way for Saudi Arabia influenza vaccine market.

Moreover, the rise in the frequency of influenza cases and the consequential impact of seasonal outbreaks have generated an increased demand for influenza vaccines. Like other nations, Saudi Arabia has witnessed significant influenza activity during flu seasons, thereby intensifying the focus on immunization to mitigate virus transmission and alleviate its impact on public health. Additionally, the growth of the Saudi Arabia influenza vaccine market has been bolstered by advancements in vaccine technologies and the wider availability of diverse vaccine options. Particularly, the introduction of quadrivalent vaccines, which offer protection against four distinct influenza strains, has gained substantial popularity in recent years owing to their improved efficacy.

The Burden of Influenza is on the Rise

Based on influenza surveillance reports by the World Health Organization (WHO), there has been a significant increase in various indicators related to influenza. The percentage of positive influenza cases, the number of influenza-like illnesses (ILIs), and the number of severe acute respiratory infections (SARIs) have seen substantial jumps. Specifically, these indicators have risen from 3.75% to 25.11% for positive influenza cases, 45 to 344 for ILIs, and 82 to 303 for SARIs when comparing the corresponding periods of 2021 and 2022, respectively.

In response to a significant rise in cases of influenza and influenza-like illnesses (ILIs), the Ministry of Health (MOH) in Saudi Arabia has issued a recent call to the population, urging them to visit primary healthcare centers (PHCs) to receive seasonal influenza vaccine (SIV). The MOH has observed a notable increase in the number of influenza cases and ILIs during the flu seasons in 2022 compared to previous years, indicating a potential strain on the healthcare system in the Kingdom. The increased incidence of influenza-like illnesses (ILI) and severe acute respiratory infections (SARI) in 2022 has contributed to the Saudi Arabia influenza vaccine market.

Notable Expansion in Pharmaceutical Infrastructure

Saudi Arabia has been making significant efforts to bolster its pharmaceutical infrastructure, with a particular focus on strengthening the availability and administration of influenza vaccines. The nation acknowledges the significance of proactive healthcare measures, like influenza vaccination, in alleviating the impact of seasonal flu and preserving the well-being of its citizens. Saudi Arabia has allocated resources towards the advancement of pharmaceutical education and research institutions, aiming to

cultivate a proficient workforce and facilitate scientific progress. Universities and research centers in the country have engaged in partnerships with international organizations, seeking to enhance pharmaceutical education programs, conduct research, and promote innovation.

For instance, Saudi Arabia's Public Investment Fund (PIF) introduced a new Contract Development and Manufacturing Organization (CDMO) named Lifera in June 2023, aimed at driving the expansion of the domestic biopharmaceutical sector. With the objective of fortifying national resilience and establishing Saudi Arabia as a prominent global pharmaceutical manufacturing hub, Lifera will primarily concentrate on the production of various pharmaceutical products. These include insulins, vaccines, plasma therapeutics, monoclonal antibodies, cell and gene therapies, as well as innovative small molecules. The establishment of Lifera demonstrates Saudi Arabia's commitment to fostering local pharmaceutical manufacturing capabilities and promoting advancements in the biopharmaceutical industry.

Government Initiatives

In 2021, an awareness campaign was launched by Saudi Arabia's Ministry of Health (MOH) to promote flu vaccinations specifically aimed at the population groups most vulnerable to seasonal influenza. The campaign aims to encourage citizens and residents, particularly those at higher risk of flu-related complications such as the elderly, individuals with chronic diseases, immunocompromised individuals, pregnant women, healthcare workers, and the general community, to receive the flu shot.

In 2022, the Kingdom introduced its most advanced surveillance system to date, known as the Integrated Influenza Sentinel Surveillance System (IISS), following the successful implementation of the National Influenza Surveillance Development Plan amid the COVID-19 pandemic. The IISS encompasses a network of 100 sites, including 30 hospitals and 70 primary healthcare clinics. This comprehensive system combines on-site molecular testing for influenza and respiratory syncytial viruses with rapid COVID-19 testing and specialized training for healthcare providers. All test data are transmitted to the Public Health Laboratory at the Public Health Authority for subtyping, genetic sequencing, and sharing. An essential component of the IISS is the COVID-19 National Genomic Surveillance Program, which plays a crucial role in monitoring the transmission patterns of SARS-CoV-2 and detecting any emerging variants at an early stage.

Recombinant Vaccines Provide Clinical Advantages

Recombinant subunit vaccines offer a solution to the challenges related to chicken embryo use and the need to weaken pathogenic strains of the influenza virus. One of the emerging strategies in subunit influenza vaccine production involves utilizing diverse expression systems to rapidly produce specific viral proteins in large quantities. This approach presents a novel method to address the problems associated with traditional vaccine production methods. Within a widely employed expression system, insect cells are utilized to generate influenza antigens by employing baculoviral vectors containing the genes encoding the desired antigens. The autographa californica multiple nucleopolyhedrovirus (AcMNPV) is the most utilized vector in this context. Sf9 cell lines derived from ovarian tissue of *Spodoptera frugiperda* are typically employed for AcMNPV-related studies. This system offers the capability to produce a diverse array of antigens from the influenza A virus. For instance, Flu blok (2022-2023 formula), developed by Sanofi Pasteur, a French multinational pharmaceutical company, is formulated using recombinant technology.

The Demand for Quadrivalent Flu Vaccines Has Been Steadily Increasing

The increasing demand for quadrivalent flu vaccine has a positive impact on Saudi Arabia influenza vaccine market. Quadrivalent vaccines aim to provide protection against two influenza A viruses and two influenza B viruses, encompassing a broader range of flu viruses compared to the previously used trivalent vaccines. Traditionally, flu vaccines targeted three different flu viruses: influenza A(H1N1), influenza A(H3N2), and one influenza B virus. However, with the addition of the second lineage of the B virus, quadrivalent vaccines offer enhanced defense against circulating flu viruses. This expanded coverage makes quadrivalent vaccines effective in safeguarding against a wider spectrum of flu viruses.

For instance, Flulaval QIV (2022-2023 formula), developed by GlaxoSmithKline PLC., a global biopharma company, is a quadrivalent flu vaccine. The current approval for this vaccine is for active immunization against influenza A subtype viruses and type B viruses in individuals aged three years and above.

Impact of COVID-19

In Saudi Arabia, prior to the onset of the COVID-19 pandemic, the rates of influenza vaccination uptake were 37.1% among individuals aged 65 years or older and approximately 45% in a sample of the general population. However, northern Saudi Arabia during 2021, amidst the COVID-19 pandemic, revealed that the prevalence of

influenza vaccination uptake had reached around 45%. Several factors were identified contributing to individuals' decision not to receive the influenza vaccine. These factors included concerns regarding potential interactions between the influenza vaccine and the COVID-19 vaccine, as well as apprehension arising from the administration of multiple doses of the COVID-19 vaccine during the pandemic.

The reduced occurrence of influenza-like illness (ILI) and severe acute respiratory infections (SARI) in 2021 can be attributed to the successful campaigns promoting the simultaneous administration of COVID-19 and seasonal influenza vaccines during the COVID-19 pandemic. However, in contrast, the increased incidence of ILI and SARI in 2022 can be linked to a lack of adherence to general preventive measures following the COVID-19 pandemic, and more importantly, a potential rise in vaccine hesitancy specifically towards the seasonal influenza vaccine (SIV).

Key Players Landscape and Outlook

The collaboration between international pharmaceutical companies and local manufacturers offers several advantages to the Saudi Arabia influenza vaccine market. Primarily, it enables the transfer of technology and exchange of knowledge, empowering local manufacturers to acquire advanced manufacturing techniques, quality control processes, and regulatory expertise. This transfer of expertise equips local manufacturers to produce medications, including vaccines, of high quality that meet international standards while enhancing their capacity to address domestic healthcare requirements. For instance, to enhance vaccine production within Saudi Arabia, Sanofi Pasteur Inc., a French pharmaceutical company announced its partnership with Saudi drug manufacturers Arabio and Lifera in July, 2023. Notably, Lifera is wholly owned by the sovereign wealth fund of the kingdom, the Public Investment Fund (PIF). These collaborations aim to strengthen influenza vaccine production capabilities and capacity in Saudi Arabia. With the signing of a recent memorandum of understanding, the companies involved will engage in exploring various preventive initiatives. This includes the possibility of Lifera serving as a contract manufacturer for Sanofi, as well as the establishment of a state-of-the-art manufacturing facility that utilizes cutting-edge vaccine technologies.

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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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