

Vaccine Market in India 2020 – Focus on COVID-19

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Abstracts

Market insights

In the past decade, the demand for vaccines has surged in India, fuelled by increased awareness of health and hygiene. Furthermore, support extended by the Indian government to enhance vaccination coverage has aggravated market growth. In terms of revenue, the vaccine market in India was valued at INR 72.44 Bn in 2019, and is estimated to reach INR 267.31 Bn by 2025, expanding at a compound annual growth rate (CAGR) of ~26.82% during the 2020-2025 period.

Segment insights:

The vaccine market in India is segmented into public and private vaccine sectors. In 2019, public vaccine sector, which mainly consists of vaccines procured by the Indian government, dominated the overall market holding a share of ~53.69%. Sales volume of the vaccines sold in the public segment through Universal Immunisation Programme (UIP) is much higher than that of the private segment; however, the price per dose of vaccine is higher in the private segment.

The revenue of the private sector, which is also known as the domestic trade market, is anticipated to surpass the public segment by 2021. Increasing demand for multivalent vaccines such as hexavalent and pentavalent vaccines, along with vaccines for Zoonotic diseases is likely to drive the private vaccine market. Furthermore, the introduction of the COVID-19 vaccine in the coming years is anticipated to support the growth of the private vaccine market.

COVID-19 vaccine progress:

India being the largest vaccine producing country in the world, is actively engaged in the

development and testing of COVID-19 vaccines through extensive research and innovation program. As of September 21, 2020, the Union Minister of India announced that three COVID-19 vaccine candidates are in the advanced stages of phase I, II, and III of clinical trial, and four in the advanced stages of pre-clinical trial.

The three vaccines in advanced stages of clinical trial are COVAXIN by Bharat Biotech International Ltd., ZyCoV-D by Cadilla Healthcare Ltd., and Covishield or AZD1222 by Serum Institute of India Pvt. Ltd. (developed by Oxford University and AstraZeneca plc). Among these three candidates, COVAXIN and ZyCoV-D are the two indigenous vaccine candidates.

Players in the vaccine market are aiming to seize the underlying opportunities of the COVID-19 vaccine market by scaling up production capacities, strengthening supply chain, and upgrading cold chain infrastructure. On the other hand, the Indian government is also preparing a road map to ensure fair and reasonable distribution of the vaccines. The government has formed a national expert group and is planning to use UIP for the COVID-19 vaccination program.

Impact of COVID-19:

The pandemic interrupted the routine immunization programs across the country, especially in the first quarter of FY 2021, owing to stringent lockdown measures and supply chain disruption. However, the market bounced back in the second quarter of FY 2021, with recovery in the sale of paediatric vaccines.

The pandemic is expected to bring about significant changes in the Indian vaccine market, by gaining attention from investors and government agencies. It is expected to drive vaccine manufacturers to focus on research and innovation and attract the entry of biotech companies in the market. Furthermore, the projected spurt for COVID-19 vaccine demand is anticipated to bolster the involvement of contract manufacturers in the production process.

Companies covered

Cadilla Healthcare Ltd. (Zydus Cadila)

GlaxoSmithKline Pharmaceuticals Ltd.

Panacea Biotec Ltd.

Pfizer Ltd.

Sanofi India Ltd.

Bharat Biotech International Ltd.

Indian Immunologicals Ltd.

Merck Sharp & Dohme Corp.

Serum Institute of India Pvt. Ltd.

Vhb Life Sciences Ltd.

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