

# Global Vaccine Market Pipeline Analysis

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## Abstracts

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'The global vaccine market is characterized into human and animal vaccines.' The segment of human vaccines is further sub-divided into four groups namely, pediatrics, adolescents, adults and elderly. Though the vaccines segment forms a very small portion of the global pharmaceutical drug sales(2-3%), the growth rate in this market has been extraordinary. This segment has grown at a high rate of 10-15% annually as compared to the overall pharmaceutical industry which grows at 5-7% per year.

The global market for vaccines is currently estimated to be worth more than US\$ 30 Billion. with factors like advances in immunology, genetics and vaccine technology as well as increased demand from population growth in emerging economies, the global vaccine market is expected to surpass estimated USD 100 billion by 2025.

“Global Vaccine Market Pipeline Analysis” by PNS Pharma gives comprehensive insight on the various vaccines being developed across multiple indications. Research report covers all vaccines being developed in various clinical phases. This report enables pharmaceutical companies, collaborators and other associated stake holders to identify and analyze the available investment opportunity in the global vaccines market based upon development process.

Following parameters for each drug profile in development phase are covered in “Global Vaccine Market Pipeline Analysis” research report:

Drug Profile Overview

Active Indication

Phase of Development

Country for Clinical Trial

Owner / Originator/ Licensee/Collaborator

Administrative Route

Drug Class

Patent Information

Molecular Formula

Brand Names

Development Agreements

ATC Codes

Number of Vaccines in Pipeline by Clinical Phase:

Research: 110

Preclinical: 378

Clinical: 15

Phase 0: 1

Phase-I: 177

Phase-I/II: 69

Phase-II: 137

Phase-II/III: 11

Phase-III: 52

Preregistration: 15

Registered: 20

Marketed: 156

Unknown: 1

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Each Drug Profile has Tables Representing Following Information:

Alternate Names

Originator & Owner

Collaborator

Technology Provider

Licensee

Highest Development Phase

Indications

Class

Mechanism of Action

ATC code

Designated Brand Name & Orphan Designation

## About

The global vaccine market is characterized into human and animal vaccines. The segment of human vaccines is further sub-divided into four groups namely, pediatrics, adolescents, adults and elderly. Though the vaccines segment forms a very small portion of the global pharmaceutical drug sales(2-3%), the growth rate in this market has been extraordinary. This segment has grown at a high rate of xx% annually as compared to the overall pharmaceutical industry which grows at xx% per year.

The global market for vaccines is currently estimated to be worth USD xx billion. with factors like advances in immunology, genetics and vaccine technology as well as increased demand from population growth in emerging economies, the global vaccine market is expected to growth at a CAGR of xx% to reach an estimated USD xx billion by 2025.

North America and Europe dominate the global vaccines market with both accounting for a combined share of 78%. The remaining 22% is accounted for by the Asia-Pacific region. Though North America and Europe would continue to be the largest markets for vaccines, it is most likely that the demand from the Asia-Pacific region would record a significant growth in the future years. In this region, specifically, India and China are likely to capture a major portion of the market share for vaccines since India has a rapidly growing demand for vaccines as compared to china and other countries in the region. Currently, the country accounts for close to xx% of the global market for vaccines.

The global market for vaccines is dominated by top 4 players like Pfizer, GlaxoSmithKline (GSK), Novartis, and Sanofi. With the shares of these companies expected to be the same, the global vaccines market is expected to be moving towards consolidation. Other players having a strong foothold in the global vaccines market include Inovio Pharmaceuticals, which is currently developing DNA-based vaccines to prevent and treat cancer and infectious diseases; Novavax Inc, which is a clinical-stage biopharmaceutical company, having 4 candidates in the clinical-stage vaccine product pipeline, of which 2 are currently in Phase 2 clinical trials. Agenus Inc, is a biotechnology company which is focusing on developing treatments for cancers and infectious diseases. Currently the clinical trials of this company include several immunotherapeutic products. Dynavax Technologies Corp. and ImmunoCellular Therapeutics Ltd. Are both clinical-stage biopharmaceutical companies, with a lead product candidate is HEPLISAV™, a hepatitis B vaccine under Phase 2 investigational

study and focus on peptide-based, cancer-targeting vaccines which activate a patient's own immune system to fight over cancer antigens respectively.

There have been many business designs which have been designed by the vaccine market participants. With relative stability in the market, the business designs are capable of enduring and succeeding for a specific period of time. However, since the market is continuously changing in its dynamics, the companies need to regularly update their strategies which is highly time consuming and also requires huge financial investment.

The significant amount of information available on the Internet has had a great impact on the awareness levels among patients. The information on the characteristics, risks and benefits of various vaccines has made the patients more demanding. This trend has made many companies to withdraw some vaccines from the market because of their expected side-effects. This has had a significant negative impact on the company's finances and these companies need to invest huge amounts in order to recover from such losses.

Innovation in vaccines development is witness in the following specific areas:

1. **Women's cancers:** Currently, the market offers two preventative HPV vaccines. Hence, companies like PDS Biotechnology and Inovio Pharmaceuticals are mostly focusing on therapeutic vaccines for women with HPV. Though the sub-segment of Ovarian cancer has been a challenging area for the companies to research on, Quest PharmaTech is currently recruiting for a phase II trial of its immunotherapy. Additionally, Breast cancer is also another segment which has many vaccine development activities.
2. **Temperature stabilization:** It is a fact that most of the vaccines need to be refrigerated. However, there has been continuous study prevailing in this area and companies are striving hard to develop vaccines which could be maintained at room temperatures. This would make a significant impact on the overall costs and also enable easy transportation, specifically in the developing countries.
3. **Hospital-acquired infections:** The hospital-acquired infection market offers many opportunities and companies looking to invest in this segment are focusing on developing vaccines for this market. Sanofi Pasteur has developed vaccines for *C. difficile*, Staph and *Pseudomonas aeruginosa* infections in its pipeline. Similarly, GSK also has several infectious-disease vaccines in its pipeline (PDF), and so does Novartis.



4. Vaccine delivery: Pharmaceutical companies have been continuously on the search of various appropriate methods of drug delivery in order to drive down the cost and/or the amount of drugs needed.

Over the forecast period, it is expected that many vaccines would be approved for a diverse range of indications. The vaccines have proved to increase the survival rates of the patients and hence with the growing demand, it is most likely that this market would offer efficient targeted vaccines. However, the growing consolidation of the vaccines market would certainly lead to the fixing of premium prices for the vaccines, which would pose as a challenge. Still with the total number of vaccines increasing, the global market does have the potential to grow at a modest rate and offer better survival rates.

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