

# Pneumococcal Vaccine Global Market Insights 2025, Analysis and Forecast to 2030, by Market Participants, Regions, Technology, Product Type

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## Abstracts

### Pneumococcal Vaccine Market Summary

The pneumococcal vaccine market represents a critical segment of the global immunization landscape, addressing one of the leading causes of serious infectious disease worldwide. Pneumococcal disease, caused by the bacterium *Streptococcus pneumoniae*, can result in a wide range of conditions including pneumonia, meningitis, and bacteremia, with high morbidity and mortality rates, particularly in children under five years of age, older adults, and immunocompromised populations. The development and distribution of pneumococcal vaccines have therefore become a cornerstone of public health initiatives across both developed and emerging economies. The market is expected to reach a size of approximately USD 8–10 billion in 2025, with growth projected at a compound annual growth rate (CAGR) of 2.5–4.5% through 2030. This reflects the combination of steady demand from national immunization programs, continuous product innovation, and expansion into middle-income countries where access to pneumococcal vaccines is increasing due to government initiatives and international funding.

### Market Characteristics

Pneumococcal vaccines fall broadly into two categories: pneumococcal conjugate vaccines (PCVs) and pneumococcal polysaccharide vaccines (PPSVs). PCVs, such as Pfizer's Prevnar 20, Merck's Vaxneuvance and CAPVAXIVE®, and GlaxoSmithKline's Synflorix, are the most widely used, especially in pediatric immunization programs. These vaccines offer strong immune responses and have become integral to global vaccination schedules due to their ability to protect against invasive pneumococcal

disease in children and adults. PPSVs, such as Merck's Pneumovax 23 and local products from companies such as Walvax Biotechnology and Shenzhen Kangtai, remain relevant for certain adult populations, particularly the elderly and those at risk of severe pneumococcal infections.

The pneumococcal vaccine market is characterized by high scientific and regulatory barriers to entry, given the complexity of vaccine development, clinical trials, and production capacity requirements. Patent lifecycles play an important role in shaping the competitive dynamics, as branded vaccines lose exclusivity and opportunities arise for new formulations with expanded serotype coverage. In addition, the market is influenced heavily by global health organizations, government procurement policies, and tender-based purchasing mechanisms.

## Regional Market Trends

### North America

North America remains the largest and most profitable market for pneumococcal vaccines, supported by high immunization coverage, government-funded vaccine programs, and significant demand from adult vaccination segments. The United States is the primary revenue generator, with Pfizer's Prevnar franchise dominating sales. The expiration of patents in the U.S. by 2026 for Prevnar is expected to gradually change the landscape, creating opportunities for newer conjugate vaccines such as Merck's CAPVAXIVE® (21-valent). The region is projected to grow at a modest rate of 2–3% CAGR through 2030, reflecting a mature but stable demand environment.

### Europe

Europe represents another key market, with strong national immunization programs, though procurement practices tend to emphasize price competition and tender-based systems. Growth rates in Europe are expected to be moderate, in the range of 2–3.5% CAGR, as demand is largely stable with incremental adoption of newer conjugate vaccines as they replace earlier-generation products. Patent expirations in major European countries in the late 2020s and early 2030s will further influence competitive dynamics.

### Asia-Pacific

The Asia-Pacific region is emerging as a high-potential growth market, with rising healthcare spending, increasing awareness of vaccine-preventable diseases, and expanding government immunization programs. China and India represent especially dynamic markets, with domestic manufacturers such as Walvax Biotechnology and Shenzhen Kangtai Biological Products playing an increasingly important role. Uptake in middle-income countries across Southeast Asia is expected to accelerate, supported by global partnerships and multilateral organizations. Growth in the Asia-Pacific region is projected in the range of 3.5–5% CAGR, higher than mature markets, driven by both pediatric and adult immunization initiatives.

### Latin America

Latin America has a long history of vaccine adoption through public immunization systems, particularly in countries like Brazil and Mexico. However, economic constraints and reliance on international aid programs affect the pace of adoption for newer, higher-valent vaccines. Growth is expected to be moderate, in the 2–3% CAGR range, with uptake concentrated in public health programs.

### Middle East & Africa (MEA)

The MEA market faces challenges of affordability, limited infrastructure, and competing healthcare priorities, but international initiatives are expanding access to pneumococcal vaccines. Countries in sub-Saharan Africa, supported by global organizations, are expected to continue scaling immunization efforts. Growth potential exists, although it will likely remain uneven across the region. CAGR is estimated in the 3–4% range, reflecting both the growing base and the impact of international aid in expanding access.

### Market Segmentation by Type

#### Pneumococcal Conjugate Vaccines (PCVs):

These vaccines are the backbone of the global market, covering multiple serotypes and providing strong protection in pediatric and adult populations. Increasing serotype

coverage has been a key trend, evolving from 7-valent to 10-valent, 13-valent, 15-valent, 20-valent, and now 21-valent formulations. With continuous improvements, PCVs are expected to remain the primary driver of market growth.

#### Pneumococcal Polysaccharide Vaccines (PPSVs):

Although less commonly used in pediatric settings, PPSVs remain essential for adult immunization, particularly among the elderly and individuals with chronic conditions. They are generally less expensive to produce, making them relevant in certain cost-sensitive markets.

#### Key Market Players and Corporate Landscape

Pfizer dominates the pneumococcal vaccine market with its Prevnar franchise (Prevnar 13 and Prevnar 20), generating revenues of USD 7–8 billion in 2024. With the U.S. patent set to expire in 2026 and Japanese protection until 2029, Pfizer faces increasing pressure from competitors.

Merck & Co. markets Vaxneuvance (15-valent PCV), with revenues of USD 0.8–0.9 billion in 2024, and launched CAPVAXIVE® (21-valent PCV) in 2024, a key product expected to play a central role after its recent market entry. Merck also markets Pneumovax 23 (PPSV), which generated USD 0.2–0.3 billion in 2024. Patent timelines extend into the next decade, securing revenue potential.

GlaxoSmithKline (GSK) produces Synflorix (10-valent PCV), with revenues of USD 0.2–0.3 billion in 2024, targeting mainly pediatric markets in Europe, Latin America, and emerging economies.

Walvax Biotechnology Co. Ltd. has developed pneumococcal polysaccharide vaccines and is expanding its presence in China and other Asian markets. The company benefits from domestic policy support and the large pediatric population base in China.

Shenzhen Kangtai Biological Products Co. Ltd. also produces polysaccharide vaccines and is building capacity to compete in both domestic and export markets.

The market is highly concentrated, with Pfizer and Merck accounting for the majority of global revenues, while regional players such as Walvax and Shenzhen Kangtai strengthen competition in domestic markets.

### Value Chain and Industry Structure

The pneumococcal vaccine value chain spans research and development, clinical trials, regulatory approvals, large-scale production, cold chain logistics, distribution, and administration through healthcare facilities. Key components include:

1. **Research & Development:** Intensive scientific investment to expand serotype coverage and improve immunogenicity.
2. **Manufacturing:** High barriers due to complexity of conjugation technology, quality control, and biosafety requirements.
3. **Distribution:** Cold chain logistics are critical, especially in emerging markets where infrastructure gaps pose challenges.
4. **Procurement & Sales:** Government tenders, international organizations, and private healthcare providers form the backbone of demand.
5. **Administration:** Vaccines are delivered through hospitals, clinics, and national immunization programs, supported by awareness campaigns.

The role of public-private partnerships, international funding agencies, and organizations such as Gavi is especially significant in expanding access in lower-income countries.

### Opportunities and Challenges

#### Opportunities:

Expansion of vaccination programs in middle-income countries with large pediatric populations.

Introduction of higher-valent conjugate vaccines, offering broader protection and justifying premium pricing.

Increasing adult vaccination uptake, particularly in high-income countries where aging populations create long-term demand.

Government and international funding programs continue to support broader immunization access in low-income regions.

#### Challenges:

High development and production costs limit the number of players and create affordability issues in cost-sensitive regions.

Patent expirations will intensify competition and pressure revenues for leading products.

Cold chain logistics and infrastructure gaps in emerging markets remain barriers to equitable distribution.

Vaccine hesitancy and misinformation in certain populations can limit immunization coverage despite availability.

Tender-based procurement in Europe and low- to middle-income countries puts downward pressure on pricing and margins.

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