

Microneedle Flu Vaccine Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2019-2029 Segmented By Product Type (Solid Microneedle, Hollow Microneedle), By Vaccine Type (Trivalent Flu Vaccine, Quadrivalent Flu Vaccine), By Region, By Competition

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Abstracts

Global Microneedle Flu Vaccine Market was valued at USD 1.10 Billion in 2023 and is anticipated to grow with a CAGR of 5.89% through 2029. Clinical trials are an important part of the drug development process. Drug delivery through the skin using transdermal patches has always been effective against viral infections and influenza. Transdermal drug delivery is primarily efficient through passive drug diffusion followed by drug development of transdermal delivery systems through various mechanisms of action such as iontophoresis and sonophoresis. Moreover, pharmaceutical companies have focused on the development of microneedle vaccines because of their great utility for transdermal delivery of very large ionic and hydrophilic drug molecules. Some microneedles are made of a drug to be delivered to the body but are shaped into a needle so they will penetrate the skin. The microneedles range in size, shape, and function but are all used as an alternative to other delivery methods like the conventional hypodermic needle or other injection apparatus. Microneedle patches are designed to precisely deliver drugs into the intradermal space, rich in immune cells, and provide a noninvasive and self-applicable vaccination approach, eliminating the need for hypodermic needles and trained medical personnel for vaccine administration.

Key Market Drivers

Rising Demand for Efficient Vaccine Delivery

Microneedles are designed to deliver vaccines directly into the dermal layer of the skin, where immune cells are more concentrated. This targeted delivery can result in a stronger and quicker immune response compared to traditional intramuscular injections. Enhanced vaccine efficacy is a significant selling point for microneedle-based flu vaccines, attracting both healthcare providers and patients. Traditional needle-based vaccinations can be associated with pain, fear, and discomfort, which can deter individuals from getting vaccinated, especially children and those with needle phobias. Microneedles offer a virtually painless and less intimidating option, increasing patient acceptance. This, in turn, can lead to higher vaccination rates, which is crucial for achieving herd immunity and reducing the spread of flu.

The simplicity and user-friendliness of microneedle-based vaccines make them suitable for self-administration, under proper guidance. This potential for self-vaccination empowers individuals to take control of their health, reducing the burden on healthcare systems and increasing vaccination coverage, particularly in remote or underserved areas. Efficient vaccine delivery through microneedles can streamline vaccination processes at healthcare facilities. The ease of administration may lead to shorter clinic visits, lower healthcare personnel requirements, and reduced costs associated with vaccination programs, thereby easing the burden on healthcare systems and increasing the accessibility of flu vaccines.

In the event of influenza pandemics or outbreaks, rapid and efficient vaccine distribution is crucial. Microneedle-based vaccines can be administered more quickly and easily than traditional injections, allowing for a faster response to emerging threats and better containment of infectious diseases. This is particularly relevant in pandemic scenarios, where timely vaccination can save lives. Some microneedle vaccine formulations are more stable at higher temperatures, reducing the need for extensive cold chain logistics. This characteristic not only simplifies storage and transportation but also makes vaccines more accessible in regions with limited access to refrigeration infrastructure, contributing to global vaccine equity.

Increased Patient Acceptance

Traditional needle-based flu vaccinations can be intimidating and uncomfortable for some individuals, including children and those with needle phobias. Microneedle flu vaccines, known for their painless and less intimidating nature, are more likely to be accepted by a broader demographic of patients. This expanded reach can result in higher vaccination rates, which are essential for achieving herd immunity and reducing

the spread of influenza. Patients who are more accepting of microneedle-based flu vaccines are more likely to comply with their vaccination schedules. This increased compliance ensures that individuals receive the necessary doses and boosts, further strengthening their immunity against the flu. Higher compliance rates can contribute to better overall public health outcomes.

Vaccine hesitancy, characterized by reluctance or refusal to vaccinate, is a significant public health concern. Microneedle flu vaccines, with their less intimidating and painful administration, have the potential to mitigate vaccine hesitancy by making vaccinations more appealing to individuals who may have reservations about traditional needles. Lowering vaccine hesitancy rates can lead to higher vaccination coverage. Parents often make vaccination decisions for their children, and their acceptance of a vaccine greatly influences whether their children receive it. Microneedle flu vaccines are more likely to be accepted by parents who are concerned about their children's comfort and well-being during vaccination. This can lead to higher vaccination rates among pediatric populations.

When patients have a positive and painless experience with microneedle-based flu vaccines, it can boost their overall confidence in vaccination. This confidence can extend to other vaccines and preventive measures, contributing to a broader public health benefit by encouraging individuals to stay up-to-date with their immunizations. Some microneedle flu vaccines are designed for self-administration under proper guidance. This empowers individuals to take control of their health and vaccination schedules, reducing the need for healthcare provider involvement. Self-administration is particularly appealing in situations where access to healthcare professionals is limited, leading to increased acceptance and accessibility.

Growing Research and Investment

Increased research and investment lead to continuous technological advancements in microneedle design, fabrication, and formulation. This results in the development of more efficient and effective microneedle-based flu vaccines. These advancements can include innovations in materials, manufacturing processes, and vaccine formulations, enhancing the overall product quality. Research and investment encourage the expansion of the types of vaccines that can be delivered using microneedles. Initially used for influenza vaccines, microneedle technology is being explored for other vaccines, such as those for measles, polio, and COVID-19. A diversified vaccine portfolio expands the market's scope and potential, driving growth.

Increased research efforts lead to more comprehensive clinical trials and studies, demonstrating the safety and efficacy of microneedle-based flu vaccines. Positive clinical results help build trust among healthcare professionals and patients, leading to wider adoption and acceptance of microneedle technology. Robust research and investment support the generation of data necessary for regulatory submissions. Meeting regulatory requirements and obtaining approvals from health authorities validate the safety and effectiveness of microneedle flu vaccines, paving the way for their commercialization and widespread use.

Investments in research can lead to improvements in the scalability and cost-effectiveness of microneedle production. This reduction in manufacturing costs can make microneedle vaccines more competitive with traditional vaccination methods, driving market growth. Research and investment initiatives often involve collaborations between pharmaceutical companies, research institutions, and governments. These collaborations can facilitate the global expansion of microneedle vaccine technology, making it more accessible in various regions and healthcare settings.

Key Market Challenges

Regulatory Approval and Standardization

Regulatory bodies, such as the FDA in the United States and the EMA in Europe, have stringent requirements for approving new medical technologies, including microneedle-based vaccines. The process of gaining regulatory approval involves extensive preclinical and clinical testing to ensure safety and efficacy. This can be time-consuming and costly, delaying the market entry of microneedle flu vaccines. The uncertainty surrounding regulatory approval timelines can make it difficult for companies to plan their market strategies effectively. Delays in approval can result in increased development costs and missed opportunities in the competitive vaccine market.

Regulatory approval is not guaranteed, and microneedle vaccine candidates may face rejections or requests for additional data, further extending the approval process. Such setbacks can erode investor confidence and limit funding for continued development. Standardizing the manufacturing processes and quality control measures for microneedle devices is essential for meeting regulatory requirements. However, microneedle technology is still evolving, and there may not be well-established industry standards or guidelines, making standardization a challenging task.

Regulatory bodies may not have clear and specific guidelines for microneedle-based

vaccines, as they do for traditional needle-based vaccines. This lack of clarity can lead to confusion and inconsistencies in the approval process, potentially delaying market entry. Microneedle designs can vary widely between manufacturers, making it difficult for regulators to establish universal standards. Each design may require its own set of validation and quality control measures, increasing complexity and regulatory scrutiny.

High Initial Costs

Developing microneedle technology for vaccine delivery involves substantial research and development (R&D) expenditures. This includes designing and refining microneedle devices, conducting preclinical and clinical trials, and optimizing vaccine formulations for microneedle delivery. These R&D costs can be prohibitive for smaller companies and startups, limiting their ability to enter the market. Clinical trials are a crucial part of gaining regulatory approval for microneedle-based flu vaccines. These trials require significant financial resources to recruit participants, monitor their health, collect data, and ensure compliance with regulatory requirements. The cost of conducting these trials can be a major barrier to market entry.

Establishing manufacturing capabilities for microneedle devices and vaccines can be expensive. Specialized equipment and cleanroom facilities are often required to produce microneedle patches at the necessary scale and quality. The initial investment in infrastructure and production facilities can be daunting. Ensuring the consistency and reliability of microneedle devices and vaccine formulations is crucial for regulatory approval and market success. Implementing robust quality control measures and validation processes adds to the initial costs, as does the need for skilled personnel to manage these aspects.

The process of gaining regulatory approval for a new medical technology, such as microneedle-based vaccines, involves extensive documentation, testing, and engagement with regulatory authorities. These activities come with their own set of costs, including fees for regulatory submissions and expert consultations. Launching a new product in the healthcare sector requires investment in marketing, distribution networks, and sales efforts. Establishing market presence and persuading healthcare providers and consumers to adopt microneedle flu vaccines can be resource intensive.

Key Market Trends

Expansion of Vaccine Portfolio

Expanding the vaccine portfolio beyond seasonal influenza vaccines opens up new revenue streams for manufacturers and developers in the microneedle vaccine market. This diversification reduces dependency on a single vaccine type and provides stability in terms of revenue generation. A broader vaccine portfolio increases the market potential for microneedle-based vaccination technology. By addressing a wider range of diseases, such as measles, polio, and COVID-19, microneedle flu vaccine manufacturers can tap into larger patient populations and address a more comprehensive set of public health needs.

Companies that offer a diverse range of microneedle-based vaccines gain a competitive advantage. A comprehensive portfolio positions these companies as leaders in the microneedle vaccine market, attracting greater attention from healthcare providers, governments, and investors. Expanding the vaccine portfolio with vaccines for different diseases contributes to improved public health outcomes. Microneedle technology can play a critical role in delivering vaccines to prevent various diseases, ultimately reducing morbidity and mortality rates globally.

A diverse vaccine portfolio allows companies to cross-promote and create synergies between different vaccine products. This can lead to more efficient marketing and distribution strategies, as well as potential cost savings in research and development. As new infectious diseases and health threats emerge, a diversified vaccine portfolio equipped with microneedle technology provides the flexibility to adapt quickly and respond to emerging public health crises. This adaptability can be particularly valuable during pandemics or disease outbreaks.

Self-Administered Vaccinations

Self-administered microneedle flu vaccines empower individuals to take control of their own vaccination schedules. This convenience makes it easier for people to get vaccinated without having to visit healthcare facilities, resulting in increased vaccination rates and broader coverage. By enabling individuals to self-administer vaccines, the burden on healthcare facilities and professionals is significantly reduced. This can alleviate overcrowding during vaccination seasons, streamline healthcare operations, and free up resources for more critical medical needs. Many individuals, including those with needle phobias or anxiety about medical procedures, may be more accepting of self-administered microneedle vaccines. The reduced fear and discomfort associated with microneedle technology can lead to higher vaccination rates, particularly among vaccine-hesitant populations.

Self-administered microneedle vaccines are well-suited for use in remote or underserved areas where access to healthcare facilities may be limited. This technology can help bridge geographical barriers and ensure that even remote populations have access to influenza vaccination. During influenza pandemics or public health emergencies, self-administered microneedle vaccines can be distributed more rapidly and efficiently. Individuals can receive vaccines in their homes or at distribution centers, minimizing the need for crowded vaccination clinics and reducing the risk of disease transmission. Self-administered vaccinations can reduce the costs associated with vaccination programs. Fewer healthcare professionals are needed for vaccine administration, and the absence of clinical visits can result in cost savings for both patients and healthcare systems.

Segmental Insights

Product Type Insights

Based on the Product Type, the Solid Microneedle segment is anticipated to witness substantial market growth throughout the forecast period. Solid microneedles are typically made of biocompatible materials and are designed to be painless when applied to the skin. This painless and minimally invasive nature makes them highly acceptable to patients, resulting in improved vaccination compliance and convenience. Solid microneedles are capable of delivering vaccines directly into the skin's dermal layer, which contains a high concentration of immune cells. This targeted delivery can enhance the immune response to the vaccine, potentially improving vaccine efficacy compared to traditional intramuscular injections. Solid microneedles are often designed for self-administration, reducing the need for healthcare professionals to administer vaccines. This reduction in healthcare personnel requirements can lead to cost savings and improved healthcare system efficiency.

Solid microneedles can be used to deliver vaccines without the need for cold chain storage and skilled healthcare providers, making them particularly suitable for use in low-resource settings and remote areas. This expands vaccine access to underserved populations. Solid microneedles can be distributed more easily than traditional liquid vaccines that require refrigeration. This simplifies the logistics of vaccine distribution, especially in regions with limited access to cold storage infrastructure. The stability of solid microneedle vaccines at higher temperatures can reduce vaccine wastage, as they are less susceptible to temperature fluctuations during transportation and storage.

Vaccine Type Insights

Based on the Vaccine Type segment, the Trivalent Flu Vaccine segment has been the dominant force in the market. Trivalent flu vaccines, which protect against three different flu virus strains (typically two influenza A strains and one influenza B strain), represent a substantial portion of the annual flu vaccine market. By developing microneedle delivery methods specifically for trivalent flu vaccines, companies can tap into a well-established market segment and gain a competitive edge. Trivalent flu vaccines are formulated to provide protection against the most prevalent flu strains expected to circulate during a given flu season. Microneedle technology can be customized to optimize the delivery of these specific vaccine components, potentially enhancing the immune response and efficacy of the trivalent vaccine.

Trivalent flu vaccines delivered through microneedles can offer a painless and convenient alternative to traditional injections, making them more appealing to patients. This improved patient acceptance can contribute to higher vaccination rates and a broader adoption of microneedle-based flu vaccines. The demand for trivalent flu vaccines is seasonal and peaks during flu seasons. Developing microneedle delivery systems tailored for trivalent vaccines can help companies align their products with the cyclical nature of flu vaccination, ensuring a steady revenue stream. The compatibility of microneedle technology with trivalent flu vaccines makes it easier for pharmaceutical companies to integrate this delivery method into their existing vaccine manufacturing processes. This compatibility facilitates a smoother transition to microneedle-based trivalent flu vaccines. Trivalent flu vaccines are crucial for reducing the burden of seasonal influenza and its associated complications. Microneedle-based delivery methods can enhance the accessibility and effectiveness of these vaccines, potentially leading to better public health outcomes.

Regional Insights

North America, specifically the Microneedle Flu Vaccine Market, dominated the market in 2023, primarily due to North America boasts a well-developed and advanced healthcare infrastructure, which provides a conducive environment for the development, manufacturing, and distribution of microneedle-based flu vaccines. The region's robust healthcare system supports research, clinical trials, and regulatory approvals, facilitating market growth. North America is a global leader in medical research and innovation. The presence of numerous research institutions, universities, and pharmaceutical companies in the region fosters continuous advancements in microneedle technology and flu vaccine development. This innovative ecosystem accelerates the growth of the

microneedle flu vaccine market.

North American pharmaceutical companies often form strategic alliances and partnerships with research organizations, government agencies, and healthcare providers. These collaborations drive research funding and facilitate the development of novel microneedle-based flu vaccines, boosting market growth. North America represents one of the largest healthcare markets globally. The substantial patient population and healthcare expenditure in the region create a significant market opportunity for microneedle-based flu vaccines, attracting investment and market players.

North America has well-established regulatory agencies, including the FDA in the United States and Health Canada. These agencies provide clear guidelines for the approval of medical technologies, including microneedle-based vaccines. Compliance with regulatory requirements in North America is crucial for market entry and growth. North American consumers are generally well-informed about healthcare innovations. The region's population tends to be receptive to new vaccination technologies, including microneedles, which can lead to higher acceptance rates and market adoption.

Key Market Players

Debiotech S.A

NanoPass Technologies Limited

Becton, Dickinson and Company

FluGen, Inc

CosMED Pharmaceuticals Co., Ltd

Microdermics Inc.

TSRL Inc

Vaxess Technologies

PFIZER, INC.

MERCK & CO., INC.

Report Scope:

In this report, the Global Microneedle Flu Vaccine Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Microneedle Flu Vaccine Market, By Product Type:

Solid Microneedle

Hollow Microneedle

Microneedle Flu Vaccine Market, By Vaccine Type:

Trivalent Flu Vaccine

Quadrivalent Flu Vaccine

Microneedle Flu Vaccine Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Microneedle Flu Vaccine Market.

Available Customizations:

Global Microneedle Flu Vaccine market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. VOICE OF CUSTOMER

5. GLOBAL MICRONEEDLE FLU VACCINE MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Product Type (Solid Microneedle, Hollow Microneedle)
 - 5.2.2. By Vaccine Type (Trivalent Flu Vaccine, Quadrivalent Flu Vaccine)
 - 5.2.3. By Region (North America, Europe, Asia Pacific, South America, Middle East & Africa)

5.2.4. By Company (2023)

5.3. Market Map

5.3.1 By Product Type

5.3.2 By Vaccine Type

5.3.3 By Region

6. NORTH AMERICA MICRONEEDLE FLU VACCINE MARKET OUTLOOK

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Product Type (Solid Microneedle, Hollow Microneedle)

6.2.2. By Vaccine Type (Trivalent Flu Vaccine, Quadrivalent Flu Vaccine)

6.2.3. By Country

6.3. North America: Country Analysis

6.3.1. United States Microneedle Flu Vaccine Market Outlook

6.3.1.1. Market Size & Forecast

6.3.1.1.1. By Value

6.3.1.2. Market Share & Forecast

6.3.1.2.1. By Product Type

6.3.1.2.2. By Vaccine Type

6.3.2. Canada Microneedle Flu Vaccine Market Outlook

6.3.2.1. Market Size & Forecast

6.3.2.1.1. By Value

6.3.2.2. Market Share & Forecast

6.3.2.2.1. By Product Type

6.3.2.2.2. By Vaccine Type

6.3.3. Mexico Microneedle Flu Vaccine Market Outlook

6.3.3.1. Market Size & Forecast

6.3.3.1.1. By Value

6.3.3.2. Market Share & Forecast

6.3.3.2.1. By Product Type

6.3.3.2.2. By Vaccine Type

7. EUROPE MICRONEEDLE FLU VACCINE MARKET OUTLOOK

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

- 7.2.1. By Product Type (Solid Microneedle, Hollow Microneedle)
- 7.2.2. By Vaccine Type (Trivalent Flu Vaccine, Quadrivalent Flu Vaccine)
- 7.2.3. By Country
- 7.3. Europe: Country Analysis
 - 7.3.1. France Microneedle Flu Vaccine Market Outlook
 - 7.3.1.1. Market Size & Forecast
 - 7.3.1.1.1. By Value
 - 7.3.1.2. Market Share & Forecast
 - 7.3.1.2.1. By Product Type
 - 7.3.1.2.2. By Vaccine Type
 - 7.3.2. Germany Microneedle Flu Vaccine Market Outlook
 - 7.3.2.1. Market Size & Forecast
 - 7.3.2.1.1. By Value
 - 7.3.2.2. Market Share & Forecast
 - 7.3.2.2.1. By Product Type
 - 7.3.2.2.2. By Vaccine Type
 - 7.3.3. United Kingdom Microneedle Flu Vaccine Market Outlook
 - 7.3.3.1. Market Size & Forecast
 - 7.3.3.1.1. By Value
 - 7.3.3.2. Market Share & Forecast
 - 7.3.3.2.1. By Product Type
 - 7.3.3.2.2. By Vaccine Type
 - 7.3.4. Italy Microneedle Flu Vaccine Market Outlook
 - 7.3.4.1. Market Size & Forecast
 - 7.3.4.1.1. By Value
 - 7.3.4.2. Market Share & Forecast
 - 7.3.4.2.1. By Product Type
 - 7.3.4.2.2. By Vaccine Type
 - 7.3.5. Spain Microneedle Flu Vaccine Market Outlook
 - 7.3.5.1. Market Size & Forecast
 - 7.3.5.1.1. By Value
 - 7.3.5.2. Market Share & Forecast
 - 7.3.5.2.1. By Product Type
 - 7.3.5.2.2. By Vaccine Type

8. ASIA-PACIFIC MICRONEEDLE FLU VACCINE MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Product Type (Solid Microneedle, Hollow Microneedle)

8.2.2. By Vaccine Type (Trivalent Flu Vaccine, Quadrivalent Flu Vaccine)

8.2.3. By Country

8.3. Asia-Pacific: Country Analysis

8.3.1. China Microneedle Flu Vaccine Market Outlook

8.3.1.1. Market Size & Forecast

8.3.1.1.1. By Value

8.3.1.2. Market Share & Forecast

8.3.1.2.1. By Product Type

8.3.1.2.2. By Vaccine Type

8.3.2. India Microneedle Flu Vaccine Market Outlook

8.3.2.1. Market Size & Forecast

8.3.2.1.1. By Value

8.3.2.2. Market Share & Forecast

8.3.2.2.1. By Product Type

8.3.2.2.2. By Vaccine Type

8.3.3. Japan Microneedle Flu Vaccine Market Outlook

8.3.3.1. Market Size & Forecast

8.3.3.1.1. By Value

8.3.3.2. Market Share & Forecast

8.3.3.2.1. By Product Type

8.3.3.2.2. By Vaccine Type

8.3.4. South Korea Microneedle Flu Vaccine Market Outlook

8.3.4.1. Market Size & Forecast

8.3.4.1.1. By Value

8.3.4.2. Market Share & Forecast

8.3.4.2.1. By Product Type

8.3.4.2.2. By Vaccine Type

8.3.5. Australia Microneedle Flu Vaccine Market Outlook

8.3.5.1. Market Size & Forecast

8.3.5.1.1. By Value

8.3.5.2. Market Share & Forecast

8.3.5.2.1. By Product Type

8.3.5.2.2. By Vaccine Type

9. SOUTH AMERICA MICRONEEDLE FLU VACCINE MARKET OUTLOOK

9.1. Market Size & Forecast

- 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Product Type (Solid Microneedle, Hollow Microneedle)
 - 9.2.2. By Vaccine Type (Trivalent Flu Vaccine, Quadrivalent Flu Vaccine)
 - 9.2.3. By Country
- 9.3. South America: Country Analysis
 - 9.3.1. Brazil Microneedle Flu Vaccine Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Product Type
 - 9.3.1.2.2. By Vaccine Type
 - 9.3.2. Argentina Microneedle Flu Vaccine Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Product Type
 - 9.3.2.2.2. By Vaccine Type
 - 9.3.3. Colombia Microneedle Flu Vaccine Market Outlook
 - 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value
 - 9.3.3.2. Market Share & Forecast
 - 9.3.3.2.1. By Product Type
 - 9.3.3.2.2. By Vaccine Type

10. MIDDLE EAST AND AFRICA MICRONEEDLE FLU VACCINE MARKET OUTLOOK

- 10.1. Market Size & Forecast
 - 10.1.1. By Value
- 10.2. Market Share & Forecast
 - 10.2.1. By Product Type (Solid Microneedle, Hollow Microneedle)
 - 10.2.2. By Vaccine Type (Trivalent Flu Vaccine, Quadrivalent Flu Vaccine)
 - 10.2.3. By Country
- 10.3. MEA: Country Analysis
 - 10.3.1. South Africa Microneedle Flu Vaccine Market Outlook
 - 10.3.1.1. Market Size & Forecast
 - 10.3.1.1.1. By Value
 - 10.3.1.2. Market Share & Forecast

- 10.3.1.2.1. By Product Type
- 10.3.1.2.2. By Vaccine Type
- 10.3.2. Saudi Arabia Microneedle Flu Vaccine Market Outlook
 - 10.3.2.1. Market Size & Forecast
 - 10.3.2.1.1. By Value
 - 10.3.2.2. Market Share & Forecast
 - 10.3.2.2.1. By Product Type
 - 10.3.2.2.2. By Vaccine Type
- 10.3.3. UAE Microneedle Flu Vaccine Market Outlook
 - 10.3.3.1. Market Size & Forecast
 - 10.3.3.1.1. By Value
 - 10.3.3.2. Market Share & Forecast
 - 10.3.3.2.1. By Product Type
 - 10.3.3.2.2. By Vaccine Type

11. MARKET DYNAMICS

- 11.1. Drivers
- 11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

- 12.1. Recent Development
- 12.2. Mergers & Acquisitions
- 12.3. Product Launches

13. GLOBAL MICRONEEDLE FLU VACCINE MARKET: SWOT ANALYSIS

14. PORTER'S FIVE FORCES ANALYSIS

- 14.1. Competition in the Industry
- 14.2. Potential of New Entrants
- 14.3. Power of Suppliers
- 14.4. Power of Customers
- 14.5. Threat of Substitute Products

15. COMPETITIVE LANDSCAPE

- 15.1. Debiotech S.A

- 15.1.1. Business Overview
- 15.1.2. Product Offerings
- 15.1.3. Recent Developments
- 15.1.4. Financials (As Reported)
- 15.1.5. Key Personnel
- 15.1.6. SWOT Analysis
- 15.2. NanoPass Technologies Limited
 - 15.2.1. Business Overview
 - 15.2.2. Product Offerings
 - 15.2.3. Recent Developments
 - 15.2.4. Financials (As Reported)
 - 15.2.5. Key Personnel
 - 15.2.6. SWOT Analysis
- 15.3. Becton, Dickinson and Company
 - 15.3.1. Business Overview
 - 15.3.2. Product Offerings
 - 15.3.3. Recent Developments
 - 15.3.4. Financials (As Reported)
 - 15.3.5. Key Personnel
 - 15.3.6. SWOT Analysis
- 15.4. FluGen, Inc
 - 15.4.1. Business Overview
 - 15.4.2. Product Offerings
 - 15.4.3. Recent Developments
 - 15.4.4. Financials (As Reported)
 - 15.4.5. Key Personnel
 - 15.4.6. SWOT Analysis
- 15.5. CosMED Pharmaceuticals Co., Ltd
 - 15.5.1. Business Overview
 - 15.5.2. Product Offerings
 - 15.5.3. Recent Developments
 - 15.5.4. Financials (As Reported)
 - 15.5.5. Key Personnel
 - 15.5.6. SWOT Analysis
- 15.6. Microdermics Inc.
 - 15.6.1. Business Overview
 - 15.6.2. Product Offerings
 - 15.6.3. Recent Developments
 - 15.6.4. Financials (As Reported)

15.6.5. Key Personnel

15.6.6. SWOT Analysis

15.7. TSRL Inc.

15.7.1. Business Overview

15.7.2. Product Offerings

15.7.3. Recent Developments

15.7.4. Financials (As Reported)

15.7.5. Key Personnel

15.7.6. SWOT Analysis

15.8. Vaxess Technologies

15.8.1. Business Overview

15.8.2. Product Offerings

15.8.3. Recent Developments

15.8.4. Financials (As Reported)

15.8.5. Key Personnel

15.8.6. SWOT Analysis

15.9. PFIZER, INC.

15.9.1. Business Overview

15.9.2. Product Offerings

15.9.3. Recent Developments

15.9.4. Financials (As Reported)

15.9.5. Key Personnel

15.9.6. SWOT Analysis

15.10. MERCK & CO., INC.

15.10.1. Business Overview

15.10.2. Product Offerings

15.10.3. Recent Developments

15.10.4. Financials (As Reported)

15.10.5. Key Personnel

15.10.6. SWOT Analysis

16. STRATEGIC RECOMMENDATIONS

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