

Pneumococcal Vaccine Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Type (Conjugate Vaccines, Polysaccharide Vaccines), By Indication (Bronchitis, Meningitis, Pneumonia, Sepsis), By Product (Pneumovax23, Prevnar 13, Synflorix), By Distribution (Government Authorities, Non-Governmental Organizations), By Region, By Competition Forecast & Opportunities, 2018-2028F

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Abstracts

Global Pneumococcal Vaccine Market has valued at USD 9634.73 million in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 6.26% through 2028. The global pneumococcal vaccine market is a crucial segment of the pharmaceutical and healthcare industry, primarily aimed at preventing infections caused by *Streptococcus pneumoniae* bacteria. Pneumococcal infections can lead to various illnesses, including pneumonia, meningitis, and sepsis, and they pose a significant public health threat, particularly to young children and the elderly.

Key Market Drivers

Rising Global Awareness of Pneumococcal Diseases

One of the fundamental reasons behind the growth of the pneumococcal vaccine market is the increasing understanding of the serious health consequences posed by pneumococcal diseases. Medical professionals, policymakers, and the general public are becoming more aware of the debilitating and potentially fatal nature of these

infections, leading to a heightened sense of urgency in preventing them.

Public health organizations and advocacy groups have played a pivotal role in disseminating information about pneumococcal diseases. Their efforts include educational campaigns, public service announcements, and initiatives that emphasize the importance of vaccination. As individuals become better informed, they are more likely to seek out and request pneumococcal vaccines.

Governments worldwide are increasingly recognizing the public health burden associated with pneumococcal diseases. In response, many countries have implemented vaccination programs as part of their broader healthcare strategies. These government-led initiatives often involve funding and subsidies, making vaccines more accessible to a wider population.

The growing awareness of pneumococcal diseases has facilitated greater collaboration among healthcare providers, pharmaceutical companies, and research institutions. These collaborations aim to improve vaccine research, development, and distribution. Pharmaceutical companies are increasingly motivated to invest in the production of pneumococcal vaccines, driven by the growing global demand.

Awareness of the broad range of individuals susceptible to pneumococcal diseases has led to the expansion of target populations for vaccination. While initially focused on infants and children, vaccination programs now often include older adults and individuals with specific health conditions, broadening the market for pneumococcal vaccines.

One of the most compelling drivers of awareness is the tangible reduction in disease burden seen in regions with effective pneumococcal vaccination programs. The decrease in pneumococcal infections, hospitalizations, and deaths is a testament to the efficacy of these vaccines and reinforces the importance of vaccination.

The ongoing COVID-19 pandemic has underscored the significance of vaccinations in protecting global health. This heightened awareness of vaccine-preventable diseases, coupled with the increased vaccine manufacturing capacity developed during the pandemic, has positioned pneumococcal vaccines as a crucial component of pandemic preparedness.

Expansive Immunization Programs

One of the primary ways in which expansive immunization programs contribute to market growth is by making pneumococcal vaccines widely accessible. Governments often procure vaccines in large quantities and distribute them through public health systems, ensuring that even remote or underserved populations have access to vaccination.

Many countries have made pneumococcal vaccination mandatory as part of their national immunization schedules. This requirement ensures a high vaccination rate, as children are routinely vaccinated against pneumococcal diseases. Such mandates lead to a consistent demand for vaccines, driving market growth.

Expansive immunization programs aim to achieve high vaccine coverage rates within specific target populations, often infants and young children. This expanded coverage directly translates into a substantial increase in the demand for pneumococcal vaccines.

Governments recognize the cost-effectiveness of vaccination programs and are willing to allocate significant resources to support them. This financial backing, in the form of subsidies, grants, and funding, helps reduce the economic burden on healthcare systems and drives the growth of the pneumococcal vaccine market.

In addition to children, immunization programs are increasingly including older adults and individuals with specific medical conditions as target groups for pneumococcal vaccination. This broadening of the target population creates a more extensive market for pneumococcal vaccines.

Expansive immunization programs also contribute to heightened public awareness of pneumococcal diseases and the importance of vaccination. As more people become informed about the potential risks of these infections, they are more likely to seek out and support vaccination efforts, further stimulating market growth.

Successful immunization programs lead to a tangible reduction in the incidence of pneumococcal diseases, hospitalizations, and associated healthcare costs. The decreased disease burden not only improves public health outcomes but also reinforces the value of vaccination, fostering continued demand for pneumococcal vaccines.

Pharmaceutical Innovation

Pharmaceutical innovation has led to the development of advanced pneumococcal vaccine formulations. Pneumococcal conjugate vaccines (PCVs) are notable examples

of this progress. These vaccines are more effective, especially in children, as they provide protection against a broader spectrum of pneumococcal strains. As new PCV formulations are introduced, they create opportunities for growth within the pneumococcal vaccine market.

Innovations in vaccine production techniques have improved the safety profiles of pneumococcal vaccines. Pharmaceutical companies are continually refining vaccine manufacturing processes to reduce adverse effects, making vaccines more palatable to both healthcare providers and patients. This enhanced safety fosters trust and increases vaccine adoption rates.

Pharmaceutical innovation has expanded the age groups for pneumococcal vaccination. Initially targeting infants and young children, recent innovations have led to vaccines designed for older adults and individuals with specific health conditions. This diversification of target populations broadens the market for pneumococcal vaccines.

Pharmaceutical companies are responding to the rise of antibiotic-resistant strains of *Streptococcus pneumoniae* through innovative vaccine development. The ability of pneumococcal vaccines to prevent infections reduces the overuse of antibiotics, thus mitigating the development of antibiotic resistance—a pressing global health concern.

Pharmaceutical innovation is propelling the creation of next-generation pneumococcal vaccines. These vaccines incorporate advancements in biotechnology and molecular biology, enabling a more targeted and robust immune response. As these next-gen vaccines are introduced to the market, they stimulate growth through improved efficacy and broader applicability.

Profound Impact on Public Health

One of the most significant ways pneumococcal vaccines impact public health is by reducing the incidence of pneumococcal diseases. As vaccination rates rise, the number of people contracting pneumonia, meningitis, and sepsis caused by pneumococcus diminishes. This decrease not only improves individual health but also alleviates the strain on healthcare systems, lowering healthcare costs.

Vaccination against pneumococcal diseases has led to a marked reduction in hospitalizations. Fewer people require intensive medical care and hospital stays due to these infections, freeing up healthcare resources for other critical needs. The resulting reduction in hospitalization rates underscores the value of pneumococcal vaccines and

contributes to their sustained demand.

Perhaps the most compelling aspect of pneumococcal vaccines is their role in lowering mortality rates. Vaccination has saved countless lives, particularly among children and the elderly who are most vulnerable to pneumococcal diseases. This life-saving impact reinforces the importance of vaccination and encourages further adoption, fostering market growth.

The profound public health impact of pneumococcal vaccines extends beyond individual health. Improved public health outcomes mean healthier communities, increased workforce productivity, and a better quality of life. As the positive effects of vaccination become evident, individuals and healthcare systems are more inclined to prioritize pneumococcal vaccination, driving market growth.

The success of pneumococcal vaccines in reducing disease burden and improving public health outcomes builds trust in vaccination programs. People are more likely to accept vaccines when they witness their effectiveness firsthand. This trust reinforces vaccination initiatives, ensuring sustained demand for pneumococcal vaccines.

Governments and healthcare systems prioritize pneumococcal vaccination due to its profound impact on public health. Recognizing the cost-effectiveness of vaccination compared to treating pneumococcal diseases, policymakers allocate resources and support vaccination programs. This prioritization bolsters the growth of the pneumococcal vaccine market.

Key Market Challenges

Economic Disparities

One of the most prominent challenges is the economic disparity among nations. High-income countries often have better access to pneumococcal vaccines due to robust healthcare infrastructures and funding. In contrast, low- and middle-income countries struggle to afford these vaccines, leading to unequal access and health disparities.

Antibiotic Resistance

The emergence of antibiotic-resistant pneumococcal strains is a global health concern. While vaccination reduces the need for antibiotics, further research and development are required to address evolving resistance patterns.

Supply Chain and Distribution

Ensuring the efficient distribution and storage of vaccines, especially in remote and underserved areas, poses logistical challenges. Maintaining the cold chain for vaccines can be difficult, leading to issues with vaccine efficacy and wastage.

Evolving Serotypes

Streptococcus pneumoniae is known for its capacity to evolve and develop new serotypes, some of which may not be covered by existing vaccines. Keeping pace with the ever-changing pneumococcal landscape requires continuous vaccine development and updates.

Key Market Trends

Next-Generation Vaccines

Advancements in vaccine technology are paving the way for next-generation pneumococcal vaccines. These vaccines are designed to offer broader protection against a wider range of pneumococcal serotypes. By harnessing innovative formulations and targeting evolving bacterial strains, next-gen vaccines are poised to enhance vaccine effectiveness and durability.

Combination Vaccines

Combination vaccines that protect against multiple diseases are gaining traction. Pneumococcal vaccines integrated with vaccines against other infectious agents can streamline immunization schedules and increase overall vaccine coverage. This trend enhances convenience and reduces the number of required shots for patients.

Vaccine Delivery Innovations

Innovations in vaccine delivery systems are set to make vaccination more accessible and efficient. Advances in needle-free technologies, microneedles, and skin patches may revolutionize vaccine administration, particularly in resource-constrained settings where maintaining a cold chain is challenging.

Expanding Market Reach

Global initiatives and partnerships are working toward expanding the reach of pneumococcal vaccines to underserved regions. Organizations like Gavi, the Vaccine Alliance, are actively promoting equitable access to vaccines, helping reach vulnerable populations and reducing global health disparities.

Segmental Insights

Type Insights

Based on the category of Type, Conjugate Vaccine is expected to experience significant growth in the market during the projected period. This can be attributed to several factors, including advancements and initiatives in the field, increased strategic activities by key industry players, and a surge in investments aimed at developing pneumococcal conjugate vaccines. These factors are anticipated to drive growth within this particular segment.

For example, in May 2021, Pfizer Inc. announced that it had initiated a new study involving adults aged 65 and older, which explored the simultaneous administration of their 20-valent pneumococcal conjugate vaccine (20vPnC) following a booster dose of the Pfizer-BioNTech COVID-19 Vaccine, authorized by the FDA under an Emergency Use Authorization. The primary objective of this trial was to assess the safety of co-administering both vaccines, with a follow-up evaluation six months after vaccination. Secondary objectives included assessing the immune responses generated by each vaccine. Additionally, in July 2021, Merck received FDA approval for VAXNEUVANCE (a 15-valent Pneumococcal Conjugate Vaccine) for the prevention of Invasive Pneumococcal Disease in adults aged 18 and older, caused by 15 specific serotypes. VAXNEUVANCE received approval based on data from seven randomized, double-masked clinical studies evaluating safety, tolerability, and immunogenicity in adults.

Furthermore, there are numerous vaccine programs being conducted worldwide, which are positively influencing market growth. For example, in November 2021, the Pneumococcal Conjugate Vaccine (PCV) program was introduced as part of the universal immunization program in Bengaluru, India. Chief Minister Basavaraj Bommai officially launched this program in the state on October 22 at KIMS, Hubballi. Moreover, in May 2022, the Union health minister of India initiated the nationwide expansion of the Pneumococcal Conjugate Vaccine (PCV) under the Universal Immunization Programme (UIP) as part of the 'Azadi ka Amrit Mahotsav' initiative commemorating 75 years of India's independence. Consequently, the proactive involvement of governments and the

increasing number of product launches and clinical trials are expected to drive growth in this segment during the forecast period.

Distribution Insights

Non-Governmental Organizations (NGOs) are poised to emerge as a prominent distribution channel in the Global Pneumococcal Vaccine Market in the forecast period for several compelling reasons. Firstly, NGOs often have well-established networks and infrastructure in regions where access to healthcare resources may be limited, making them invaluable partners in reaching underserved populations. Secondly, their presence is often driven by a strong commitment to public health, which aligns with the broader mission of ensuring vaccine accessibility to all, especially in developing regions. Additionally, NGOs are known for their agility and ability to quickly respond to health crises, making them ideal partners for vaccine distribution during emergencies or outbreaks. Lastly, their reputation for transparency and accountability enhances confidence among donors and stakeholders, further bolstering their role in vaccine distribution efforts. In light of these factors, the rise of NGOs as a distribution channel is expected to be a significant driver of increased vaccine accessibility and market growth in the coming years.

Regional Insights

In the forthcoming forecast period, North America is poised to maintain a substantial market share within the overall market. This is attributable to several key factors, notably the presence of major industry players and a well-established healthcare infrastructure, which collectively underpin its significant market presence. Additionally, the region's noteworthy investments in pneumococcal vaccine development, coupled with an uptick in pneumonia cases within the studied region, are anticipated to fuel market expansion.

As per the National Foundation for Infectious Diseases, updated data in March 2022 reveals that pneumococcal pneumonia leads to the hospitalization of approximately 150,000 individuals annually in the United States. This elevated incidence of pneumococcal infection within the region is expected to be a driving force behind market growth. Furthermore, according to the January 2023 update from the CDC, in 2021, 24.0% of adults aged 18 and above in the United States had received a pneumococcal vaccination at some point. Consequently, the projected increase in pneumonia cases is anticipated to spur demand for pneumococcal vaccines in the region, thereby fortifying market growth prospects throughout the forecast period.

Furthermore, the substantial market share held by North America is also attributed to the robust presence of key industry players and a well-developed healthcare infrastructure. Notably, in July 2021, the FDA granted approval for Merck's VAXNEUVANCE (Pneumococcal 15-valent Conjugate Vaccine) for active immunization against invasive diseases caused by multiple *Streptococcus pneumoniae* serotypes in adults aged 18 years and older. Similarly, Health Canada authorized two new pneumococcal vaccines for adults aged 18 and older, namely Prevnar 20 (PNEU-C-20) in May 2022 and Vaxneuvance (PNEU-C-15) in November 2021. Vaxneuvance also received authorization for infants and children aged 6 months to 17 in July 2022. Consequently, the surge in approvals and the introduction of new pneumococcal vaccine products within the studied region are expected to bolster market expansion throughout the forecast period.

Key Market Players

GSK PLC

Pfizer Inc

Merck KGaA

Serum Institute of India Pvt Ltd

CSL Ltd

Sanofi SA

Walvax Biotechnology Co., Ltd

Beijing Minhai Biotechnology Limited Company

Report Scope:

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

Pneumococcal Vaccine Market, By Type:

Conjugate Vaccines

Polysaccharide Vaccines

Pneumococcal Vaccine Market, By Indication:

Bronchitis

Meningitis

Pneumonia

Sepsis

Pneumococcal Vaccine Market, By Product:

Pneumovax23

Prevnar 13

Synflorix

Pneumococcal Vaccine Market, By Distribution:

Government Authorities

Non-Governmental Organizations

Pneumococcal Vaccine Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

United Kingdom

France

Italy

Spain

Asia-Pacific

China

Japan

India

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Competitive Landscape

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

Available Customizations:

Global Pneumococcal 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).

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