

Human Vaccine Adjuvants Market Size and Forecast (2020 - 2030), Global and Regional Share, Trends, and Growth Opportunity Analysis Report Coverage: By Type (Particulate Adjuvant, Emulsion Adjuvant, Combination Adjuvant, and Others), Application (Influenza, Hepatitis, Human papilloma virus (HPV), and Others), End User (Pharmaceutical and Biotechnology Companies, CMOs and CROs, and Others), and Geography (North America, Europe, Asia Pacific, Middle East & Africa, and South & Central America)

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Abstracts

The global human vaccine adjuvants market is expected to reach US\$ 4.489 billion in 2030 from US\$ 1.571 billion in 2022. The market is estimated to grow with a CAGR of 14.0% from 2022 to 2030. Key factors driving the human vaccine adjuvants market growth include the rising prevalence of chronic diseases and growing focus on immunization programs.

Market Opportunities of Human Vaccine Adjuvants Market

The expanding pharmaceutical industry is expected to positively influence the demand for adjuvants as they can improve the efficacy and safety of vaccines. The pharmaceutical industry's increasing focus on infectious diseases, cancer, and autoimmune disorders provides a platform for developing personalized vaccines and adjuvants targeted at these specific disease areas. This offers an opportunity for

adjuvant manufacturers to develop specialized adjuvants to enhance the immune response to vaccines for these diseases.

The US has one of the most R&D-intensive pharmaceutical industries globally. According to the European Federation of Pharmaceutical Industries and Associations (EFPIA), the North America market (US and Canada) remained the world's largest market with a 49.1% share, well ahead of Europe, China, and Japan. The US is the global leader in innovative R&D investments, and the country produced over half of the world's new molecules in the last decade. Additionally, as per EFPIA, in 2021, North America accounted for 49.1% of global pharmaceutical sales, compared with 23.4% for Europe.

Similarly, according to the EFPIA, the Brazilian, Chinese, and Indian pharmaceutical industries grew by 11.7%, 6.7%, and 11.8% during the 2016–2021 period, respectively, compared to the top five European Union markets and the US market, which recorded an average market growth of 5.8% and 5.6%, respectively. Furthermore, as per the India Brand Equity Foundation (IBEF), India is a major and rising global pharmaceutical industry player. The country is the world's largest trader of generic medications, accounting for nearly 20% of the worldwide supply by volume. It supplies ~50% of the global vaccination demand. The domestic pharmaceutical industry includes a network of 3,000 drug companies and ~10,500 manufacturing units. Based on official figures from the Indian government, the pharmaceutical sector in India is valued at nearly US\$ 50 billion, of which over US\$ 25 billion is derived from exports. India accounts for ~20% of the world's generic medicine exports. Further, Japan is one of the largest pharmaceutical markets in the world. According to the Ministry of Health, Labor and Welfare's (MHLW) Annual Pharmaceutical Production Statistics, the Japanese market for prescription and nonprescription pharmaceuticals in 2020 was US\$ 107 billion.

As the industry continues to evolve and innovate, there is an increasing demand for adjuvants that can support the development of personalized vaccines, driving significant growth and investment in the human vaccine adjuvants market. Thus, the growing pharmaceutical industry worldwide will likely create lucrative growth opportunities for the human vaccine adjuvants market in the coming years.

Factors Hampering Human Vaccine Adjuvants Market

Manufacturing human vaccine adjuvant is a complex process involving stringent regulatory requirements and quality control measures. The production of adjuvants requires specialized equipment and facilities with strict adherence to Good

Manufacturing Practices (GMP) and other regulatory standards to ensure the final product's purity, safety, and efficacy. This can pose significant challenges for manufacturers, especially smaller companies or new entrants, owing to limited resources and expertise to meet these requirements.

Regulatory challenges also play a significant role in restraining the human vaccine adjuvants market. Adjuvants are considered critical components of vaccines, and they are subjected to strict regulatory oversight by health authorities such as the European Medicines Agency (EMA) in Europe and the Food and Drug Administration (FDA) in the US. The regulatory approval process for adjuvants can be lengthy and complex, requiring extensive preclinical and clinical data to demonstrate safety, efficacy, and quality. It can pose a significant barrier for manufacturers, as the cost and time required to obtain regulatory approval can be substantial. Thus, the factors mentioned above hamper the growth of the human vaccine adjuvants market.

Human Vaccine Adjuvants Market: Segmental Overview

Based on type, the human vaccine adjuvants market is segmented into particulate adjuvants, emulsion adjuvants, combination adjuvants, and others. The particulate adjuvant segment held a larger share of the market in 2022. However, the emulsion adjuvants segment is expected to register a higher CAGR in the market from 2022 to 2030. Particulate adjuvants consist of particles, often of nanometer or micrometer size, designed to mimic pathogens or cellular structures, stimulating a robust immune response. These adjuvants enhance antigen uptake by immune cells and promote immune activation. Notable examples of particulate adjuvants include aluminum salts (Alum), which have been used for decades in human vaccines to enhance antibody responses, and newer developments such as virus-like particles (VLPs) and nanoparticle-based adjuvants.

By application, the human vaccine adjuvants market is segmented into influenza, hepatitis, human papillomavirus (HPV), and others. The influenza segment held the largest share of the market in 2022 and is expected to register the highest CAGR in the market from 2022 to 2030. Influenza vaccines are crucial for preventing seasonal flu outbreaks and potential pandemics. They target a rapidly evolving virus, requiring continual vaccine updating to match circulating strains. Adjuvants used in influenza vaccines enhance immune responses, particularly in high-risk populations such as the elderly or immunocompromised individuals. They also support the development of broadly protective, cross-reactive immune responses.

In terms of end user, the human vaccine adjuvants market is segmented into pharmaceutical and biotechnology companies, CMOs and CROs, and others. The pharmaceutical and biotechnology companies segment held the largest share of the market in 2022 and is expected to register the highest CAGR in the market from 2022 to 2030. Pharmaceutical and biotechnology companies play a central role in the research, development, and commercialization of vaccines, including adjuvanted vaccine formulations, targeting diverse infectious diseases and health conditions. These companies are at the forefront of vaccine innovation, driving the discovery and optimization of adjuvant technologies, vaccine candidates, and adjuvanted vaccine formulations through preclinical and clinical development stages.

Human Vaccine Adjuvants Market: Geographical Overview

North America accounted for the largest global human vaccine adjuvants market share in 2022. The US holds a significant share of North America's human vaccine adjuvants market. The market growth in this country is mainly ascribed to rising government spending on healthcare and a surging demand for novel vaccine formulations to treat infectious diseases more efficiently. According to the US Centers for Medicare & Medicaid Services, national healthcare expenditures in the US increased by 2.7% in 2021, reaching US\$ 4.3 trillion or US\$ 12,914 per person. Health spending accounted for 18.3% of the nation's GDP. As per the US Department of Health & Human Services, national health spending is expected to grow at an annual rate of 5.4% from 2019–2028, reaching US\$ 6.2 trillion by 2028. The rising health expenditure may lead to a rise in funds allocation for the research and development of vaccines, fueling the demand for human vaccine adjuvants.

According to new findings derived from the Global Burden of Disease study published in July 2020, there is a large and increasing burden of noncommunicable and infectious diseases in the US. According to Johns Hopkins University, the cases of diseases such as SARS, Lyme disease, dengue fever, West Nile virus, and Zika virus infection have increased rapidly in the last two decades in the US. Also, the same source affirmed an increase in the incidence of re-emerging diseases such as malaria, tuberculosis, cholera, pertussis, influenza, pneumococcal disease, and gonorrhea. Similarly, according to the Centers for Disease Control and Prevention (CDC), flu has resulted in 100,000 to 710,000 hospitalizations and 4,900 to 52,000 deaths annually between 2010 and 2022. According to a report by ICO/IARC Information Centre on HPV and Cancer in 2023, the US has a population of 140.5 million women aged 15 years and older who are at risk of developing HPV-related cervical cancer. Nearly 3.9% of women in the US in the general population are projected to harbor cervical HPV16/18 infection at a given

time, and 71.2% of invasive cervical cancers are attributed to HPVs 16 or 18. Thus, a rise in the incidences of various infections and re-emerging diseases boosts companies' efforts in vaccine development, fueling the human vaccine adjuvants market growth in the US.

The US government strives to create a conducive environment for developing and commercializing pharmaceutical and healthcare products in the country. The country has several potential pharmaceutical and medical device market players, including Pfizer, Novartis, Boston Scientific, Integra LifeSciences, Amgen, and Abbott, with various patents for their pharmaceutical and medical device industry innovations. Thus, an increase in drug development activities by various pharmaceutical giants bolsters the human vaccine adjuvants market in the US.

A few of the major primary and secondary sources referred to while preparing the report on the human vaccine adjuvants market are the World Bank Data, National Health Service (NHS), FDA (Food and Drug Administration), EMA (European Medicines Agency), and WHO (World Health Organization).

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