

Pneumococcal Vaccines Market - Trend & Industry Analysis

Report Overview

Pneumococcal Vaccines Market Synopsis

Pneumococcal Vaccines Market Size Was Valued at USD 9.04 Billion in 2023, and is Projected to Reach USD 16.90 Billion by 2032, Growing at a CAGR of 7.20% From 2024-2032.

Pneumococcal vaccines market refers to the global market for vaccines designed to have special prevention activity against diseases caused by *Streptococcus pneumoniae* bacteria. Being given to prevent diseases such as pneumonia, meningitis and bloodstream infections is the reason they are administered.

- In this regard, Pneumococcal Vaccines market is has expanded very much with regard to the actual rise in pneumococcal diseases and the growing awareness and acceptance of vaccines in the global markets. Although for the last few decades proficiency in vaccine production and awareness about the diseases have helped to decrease the incidence of pneumococcal diseases like pneumonia, meningitis, and sepsis, the diseases are dangerous conditions and remain threats to infants, elderly people, as well as, patients with lowered immunity. Currently, governments as well as other health institutions are campaigning for widespread vaccination and this led to rise in demand for pneumococcal vaccines. The WHO and its partners like Gavi, the Vaccine Alliance have brought immunization agendas to various low and middle income countries hence increasing demand for the pneumococcal vaccines, thus advancing the pneumococcal vaccines market.
- New technologies and outstanding development of vaccines are also some of the factors that have also boosted the market. Commercialisation of formulations like conjugate within the uniquely formulated products is on a rise. Moreover, pharmaceutical companies are continuing to focus company's resources on research and development for better performance of vaccines and broader protection against various serotypes of pneumococcal. However, certain factors constraining the market development include an expensive vaccines market and its restricted availability in some countries. Nevertheless, constraints such as high development costs, nomenclature issues, current crises such as the covid-19 pandemic and others should not be an obstacle that the pneumococcal vaccines market will face in the future, as the world and society continue to demand effective preventive treatments.



Pneumococcal Vaccines Market Trend Analysis

Rising Demand for Multivalent Vaccines

- The conditions for segmented products have appeared as tendencies in the pneumococcal vaccines markets.. Streptococcus pneumoniae is one bacteria that is targeted by PCVs which are example of multivalent vaccines. For this reason, the serotypes covered by the currently available vaccines are much wider than the first-generation pneumococcal vaccines, because of mutation of the serotype or changes in the pneumococcal strain. For instance, while some vaccines, like Prevnar 13, guard against thirteen types of pneumococcal serotypes, relative to former monovalent vaccines that protect against just one bacteria species.
- The growing antibiotic resistance and high incidence of various pneumococcal diseases around the world explain using pneumococcal vaccines, including pneumococcal conjugate vaccines (PCVs) acting against several strains of Streptococcus pneumoniae. Moreover, due to new strains of pneumococci that are continually being identified, the development of multivalent vaccines has been considered essential due to increased acceptability. For example, while Prevnar 13 protects against up to 13 serotypes of pneumococci, which is vastly superior to previous units, single-ovalent vaccines.

Expansion in Emerging Markets

- The growth in the emerging marked holds a prospective opportunity to the pneumococcal vaccines market. A high burden of pneumococcal disease is reported in low- and middle-income countries especially in the African, Asian and Latin American regions but vaccination has however not gained the required coverage in most of these regions. Gavi and WHO continue to help improve access to vaccines among these areas, offering funding that will help to grow immunisation services. This has created a gap that has enabled pharmaceutical firm to expand and extend its markets to introduce pneumococcal vaccines in developing countries.
- Since the countries' health infrastructure is shifting upwards in such regions, the consumption of preventive vaccines will be established. Furthermore, due to governments in EMs focus on health care sector, major global vaccine manufacturers and local governments' relations are expected to grow, in turn, becoming a highly attractive opportunity for market players to strengthen their position in the regions with high demand. This would probably push the development of the pneumococcal vaccines market since firms will work towards expanding access to vaccines in developing world..

Pneumococcal Vaccines Market Segment Analysis:

Pneumococcal Vaccines Market Segmented based on Vaccine Type, Product, and End User.

By Vaccine Type, Pneumococcal Polysaccharide Vaccine segment is expected to dominate the market during the forecast period

- The pneumococcal vaccines market can be segmented based on the type of vaccines you have: Pneumococcal Conjugate Vaccine (PCV) and Pneumococcal Polysaccharide Vaccine (PPV). Some of the PCVs which we have include Prevnar 13 that targets and helps to protect against many serotypes of the pneumococcus and which is used in infants, young children,

as well as adults aged sixty-five years and above. These vaccines familiarly offer a prolonged immunity when corners are conjugated to a polysaccharide antigen so that the immunological response is elevated. Due to these advantages, PCVs have been incorporated into the schedules of immunizations of many countries constituting both the developed and the developing world.

- On the other hand, PPVs such as Pneumovax 23 are for elderly and at risk groups although its use has been challenged in certain patients due dinner vaccine bottle neck effect. PPVs provides wider spectrum of protection against more pneumococcal serotypes and are less effective than conjugate vaccines, although PPVs are relatively more effective in young children and immunocompromised individuals. Nevertheless, PPVs are still valuable in vaccination programs because of the capacity to guard against multiple strains of pneumococcal, especially in adult persons.

By Product, Pneumovax 23 segment held the largest share in 2023

- This market has many key products, namely Prevnar 13, Synflorix, Pneumovax 23, VAXNEUVANCE, PNEUMOSIL, and others. Prevnar 13 one of the commonly used pneumococcal vaccines in the world manufactured by Pfizer to protect against 13 pneumococcal serotypes. The vaccine has been remarkably effective in childhood and adult immunization, and now occupies one of the niches in the international market. Likewise there is Synflorix; a 10 pcv developed by GlaxoSmithKline used in many regions for childhood immunization.
- Another desaccharide Merck's Pneumovax 23 provides cross reactive immunity against 23 different serotypes and commonly recommended for adult vaccination. VAXNEUVANCE on its part produced by Merck is relatively new to the market but is also looking at protecting against 15 serotypes. One such vaccine is PNEUMOSIL developed by Serum Institute of India; it has found favour in low middle income countries because of its enormously low cost and high efficacy. These products remain imperative in the current world fight against this burden of pneumococcal disease.

Pneumococcal Vaccines Market Regional Insights:

North America is Expected to Dominate the Market Over the Forecast period

- North America generates the largest demand for pneumococcal vaccines owing to the high vaccination rate and the headquarters of many drug firms. Healthcare has grown consistently in the region; government support, and population awareness of vaccines make it rank. Prevnar 13 and Pneumovax 23 vaccines in the United States extensively advertised, which put them into the national immunization schedules.
- Furthermore, the Europe holds a strong market share in pneumococcal vaccination as UK, Germany and France has good health informative policy regarding to pneumococcal vaccination. Measures by European Union on immunization along with other endeavors to enhance the access to vaccines incordlessiae in low income region have strengthened the market of the region. But the current economies in Asia-Pacific area especially in China and India are developing fast and should take a larger market share in the future.

Active Key Players in the Pneumococcal Vaccines Market

- Pfizer (United States)
- GlaxoSmithKline (GSK) (United Kingdom)
- Merck & Co. (United States)
- Sanofi (France)
- Serum Institute of India (India)
- Walvax Biotechnology Co., Ltd. (China)
- Astellas Pharma Inc. (Japan)
- Others Key Player

Key Industry Developments in the Pneumococcal Vaccines Market

- In January 2024, Pfizer Inc. received marketing authorization from the Committee of Medicinal Products designed for Human Use (CHMP) of the European Medicines Agency (EMA) for its 20-valent pneumococcal conjugate vaccine candidate (20vPnC).
- In October 2023, Vaxcyte, Inc. collaborated with Lonza for a new commercial manufacturing agreement. With this collaboration, Vaxcyte plans to expand its commercial manufacturing capacity for its PCV candidates.
- In April 2023, Pfizer Inc. received FDA approval for Prevnar 20 to prevent Invasive Pneumococcal Disease (IPD) in infants..

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Segmentation Table

Pneumococcal Vaccines Market Scope:

| Global Pneumococcal Vaccines Market | | | |
|--------------------------------------|--|--|---------------|
| Base Year: | 2023 | Forecast Period: | 2024-2032 |
| Historical Data: | 2017 to 2023 | Market Size in 2023: | USD 9.04 Bn. |
| Forecast Period 2024-32 CAGR: | 7.20% | Market Size in 2032: | USD 16.90 Bn. |
| Segments Covered: | By Vaccine Type | <ul style="list-style-type: none"> - Pneumococcal Conjugate Vaccine - Pneumococcal Polysaccharide Vaccine | |
| | By Product | <ul style="list-style-type: none"> - Prevnar 13 - Synflorix - Pneumovax 23 - VAXNEUVANCE - PNEUMOSIL - Other Products | |
| | By End User | <ul style="list-style-type: none"> - Public Sector - Private Sector | |
| | By Region | <ul style="list-style-type: none"> - North America (U.S., Canada, Mexico) - Eastern Europe (Bulgaria, The Czech Republic, Hungary, Poland, Romania, Rest of Eastern Europe) - Western Europe (Germany, UK, France, Netherlands, Italy, Russia, Spain, Rest of Western Europe) - Asia Pacific (China, India, Japan, South Korea, Malaysia, Thailand, Vietnam, The Philippines, Australia, New-Zealand, Rest of APAC) - Middle East & Africa (Turkey, Bahrain, Kuwait, Saudi Arabia, Qatar, UAE, Israel, South Africa) - South America (Brazil, Argentina, Rest of SA) | |
| Key Market Drivers: | - Increasing Awareness and Immunization Programs | | |
| Key Market Restraints: | - High Costs and Limited Access | | |
| Key Opportunities: | - Expansion in Emerging Markets | | |

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| Companies Covered in the report: | - Pfizer (United States), GlaxoSmithKline (GSK) (United Kingdom), Merck & Co. (United States), Sanofi (France), Serum Institute of India (India), Walvax Biotechnology Co., Ltd. (China), Astellas Pharma Inc. (Japan) and Other Major Players. |
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