GlobalData

LONDON, UK (GlobalData), 7 June 2015 - The meningococcal vaccines market is expected to grow from around $1.1 billion in 2015 to $1.8 billion by 2025 across the eight major markets (8MM) of the US, France, Germany, Italy, Spain, the UK, Japan, and Brazil, representing a compound annual growth rate of 5.4%, according to research and consulting firm GlobalData.

The company's latest report * states that this substantial growth will mainly be driven by adjustments in national immunization schedules, as governments implement more inclusive vaccination schedules to prevent invasive meningococcal disease. It will also be propelled by the anticipated launch of a first-in-class vaccine covering all serogroups currently prevalent in the 8MM by combining two different meningococcal vaccines, thereby decreasing the dosage burden involved in vaccinations.

Mirco Junker, Ph.D., GlobalData's Analyst covering Infectious Diseases, says: "Although the meningococcal vaccine market in the 8MM is highly mature, and the continuous decline in incidence rates of meningococcal disease across most of these countries will act as a barrier to launching new products, there will be several opportunities for a current or future player to distinguish itself from the competition.

"For example, the meningococcal vaccines market is characterized by a large diversity of vaccines, with each covering only a specific serogroup or a set of serogroups. However, the epidemiology of serogroup distribution varies by country and over time. Therefore, providing a single vaccine that can protect the population against all prevalent serogroups will represent the most important opportunity to access a larger market share during the forecast period, by reducing the number of vaccines required to prevent meningococcal disease."

Traditionally, the meningococcal vaccine marketplace has been dominated by Big Pharma, with Sanofi, GlaxoSmithKline (GSK), Pfizer, and Novartis providing the majority of commercially available vaccines over the past decade. In the last few years, the meningococcal vaccine market has experienced additional changes, after Novartis sold its meningococcal vaccine portfolio to GSK, and after the recent launch of GSK's Bexsero and Pfizer's Trumenba, the first two vaccines to offer protection against serogroup B.

Junker concludes: “GlobalData expects that GSK will pass Sanofi as the main provider of meningococcal vaccines by the end of this forecast period. This growth in the company’s market share will be driven by Bexsero, which will hit sales of over $570 million in 2025, as well as their novel pentavalent vaccine, MenABCWY, which is expected to launch in the US and five European countries during the forecast period.”

* **PharmaPoint: Meningococcal Vaccines – Global Drug Forecast and Market Analysis to 2025**