GlobalData»

London – 27 October 2016 - The seasonal influenza vaccine market across the seven major markets (7MM) of the US, France, Germany, Italy, Spain, the UK, and Japan, will rise from $3.1 billion in 2015 to $4.3 billion by 2025, at a compound annual growth rate of 3.3%, according to research and consulting firm GlobalData.

The company's latest report states that the main growth drivers during the forecast period will include amendments to the national immunization schedules of the US and the UK, the expansion of egg-based quadrivalent seasonal influenza vaccines across Germany, Italy, France, and Spain, and the transition from egg-based to cell culture-based vaccines
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Christopher J. Pace, Ph.D., GlobalData's Director of Infectious Diseases, explains: "For the past few decades, children have not been the focus of season influenza immunization recommendations in developed nations.

"More recently, developed countries such as the US and the UK have issued expanded recommendations for the vaccination of healthy children and adolescents against seasonal influenza, thereby indirectly protecting high-risk groups such as the elderly and the immunocompromised from disease by disrupting community transmission. This generates a significant new opportunity for market penetration."

Quadrivalent influenza vaccines, which contain antigens against two influenza type A and two influenza type B subtypes, offer broader coverage than trivalent (two influenza A and a single influenza B strain) formulations. In 2015, Japan replaced its trivalent, seasonal influenza vaccines with quadrivalent formulations, and it is expected that trivalent vaccines will be virtually absent from the US market within the next five years. Quadrivalent vaccines will also expand throughout Europe by 2025.

Pace continues: “Although the vaccination rate across the 7MM is anticipated to remain stable during the next decade, the higher price commanded by quadrivalent vaccines and other next-generation immunizations, such as Sanofi’s Fluzone High-Dose and CSL Limited’s Fluad , is expected to drive market growth.

“In regards to the transition from egg-based to cell culture-based vaccines, 2016 saw CSL Limited launch the first quadrivalent cell culture-based vaccine on the US market indicated for the immunization of children over four years old – Flucelvax. Its novel manufacturing processes decrease production time compared to egg-based vaccine development and also can be administered to individuals who have egg allergies, giving cell culture-based vaccines an important edge in an intensely competitive marketplace.

“Novavax’s and Mitsubishi Tanabe’s novel virus-like particle vaccines are also anticipated to further revitalize an influenza market that is gradually moving towards the eventual development of a universal seasonal influenza vaccine.”