

Anthrax Vaccine - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The anthrax vaccine market is expected to register an estimated CAGR of 7.6% during the forecast period.

Key Highlights

-COVID-19 impacted the anthrax vaccine market due to the cancellations of treatments other than COVID-19 and the slowdown of research and development activities for developing an anthrax vaccine. The market players also reported a decline in revenues. For instance, as per the Emergent BioSolutions Inc. FY2021 annual report, the revenue of the anthrax vaccines in FY2021 decreased to USD 259.8 million from USD 373.8 in the previous year. A decrease of 43.8% in anthrax vaccine revenue was reported in 2021. However, the market started recovering since the restrictions were lifted worldwide. In the current scenario, the market has been gradually recovering with the rising Food and Drug Administration (FDA) approvals for new anthrax vaccines and is expected to register market growth in the forecast period.

-The studied market growth is largely attributed to factors such as the increasing prevalence rate of anthrax and the rising consumption of undercooked or raw meat.

-Various government initiatives have been adopted to implement the anthrax vaccination in the country, which is expected to propel the market growth. For instance, as of September 2021, a total of 583 vials (5,830 doses) of the anthrax vaccine were released from the HHS ASPR-managed Strategic National Stockpile for administration to volunteers, and of these, 3,680 doses were administered under the Department of Homeland Security (DHS) first responder vaccine initiative pilot program. The pilot program was continued till December 2021. The pilot program is anticipated to provide anthrax vaccines to selected states in the United States and local emergency response providers to offer vaccinations to emergency responders across the country who are at high risk of exposure to anthrax. Such government-funded programs are expected to propel the market growth during the forecast period.

-In addition, as per the National Institute of Health (NIH) estimates of funding for various research, condition, and disease

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categories (RCDC), May 2022 update, the research spending on anthrax was USD 19 million in 2021 and USD 20 million in 2022 in the United States. The high spending on the research and development activities of the diseases is expected to create opportunities for market growth during the forecast period.

-Furthermore, the strategic initiatives adopted by market players, such as partnerships, approvals, and clinical trial development, are also contributing to the growth of the studied market. For instance, in April 2022, Emergent BioSolutions Inc. applied for BLA submission for AV7909 post-completion of phase 3 clinical study. The study evaluated the immunogenicity and safety of the vaccine candidate following a two-dose schedule administered intramuscularly in healthy adults. To oversee the development of this program from the early stages to the advanced stages, Emergent has partnered up with the US government. Such partnerships and clinical trial development are estimated to propel the market growth during the forecast period.

-Additionally, in April 2021, Altimune, Inc., a clinical-stage biopharmaceutical company, reported clinical data on its NasoShield intranasal anthrax vaccine candidate. The Phase 1b trial evaluated the safety and immunogenicity of one and two-dose regimens of NasoShield in healthy volunteers. The clinical trial was carried out with support from the BARDA. Hence, the rising clinical trial activities to develop an innovative anthrax vaccine are expected to propel the market growth during the forecast period.

-Therefore, owing to the aforementioned factors, such as rising clinical trial activities and launches by market players and high investment in R&D of the diseases, the studied market is anticipated to witness growth over the analysis period. However, the lack of awareness of a diagnostic test of the target disease and the high cost of the vaccine are likely to impede market growth.

Anthrax Vaccine Market Trends

Animal Use Anthrax Vaccine Segment is Expected to Hold a Significant Market Share Over the Forecast Period

- Anthrax is a disease of cattle and other ruminants that results in death in affected animals. It is a zoonotic disease that affects both humans and animals worldwide and is brought on by the soil-borne spore-forming bacteria *Bacillus anthracis*. The animal-use anthrax vaccine segment is expected to hold a significant market share over the forecast period owing to the increased awareness among animal owners regarding anthrax vaccination and rising initiatives by market players to develop animal vaccines.

- According to an article published in the *Veterinary World Journal* in April 2021, the prevalence of anthrax globally was 28% from 2452 samples through the fixed effects model. The random effects model's continent-by-subgroup study showed that the pooled prevalence of anthrax was highest in Africa (29%) and lowest in North America (21%). The spread of anthrax from infected animals to humans is one of the common modes of transmission of bacteria. Therefore, the high burden of anthrax in livestock animals globally is expected to propel the segment growth during the forecast period.

- Furthermore, the rising awareness among farm animal caretakers regarding their livestock animal anthrax vaccination is also contributing to the segment's growth during the forecast period. For instance, in May 2022, SDSU Extension and South Dakota Animal Industry Board veterinarians encouraged South Dakota cattle producers to include the anthrax vaccine in their vaccination program when they turn out cattle to summer pastures in the spring. These initiatives are projected to boost the anthrax vaccination utility in animals for the protection of their animals from lethal diseases and also reduce the transmission of bacteria to humans.

- Therefore, owing to the aforementioned factors, such as the high burden of anthrax in animals and rising anthrax vaccination initiatives for animals is projected to propel the segment growth during the forecast period.

Asia-Pacific Holds a Significant Share in the Anthrax Vaccine Market Over The Forecast Period

- Asia-Pacific holds a significant share in the anthrax vaccine market over the forecast period owing to the high burden of anthrax

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in the region and rising consumption of undercooked/raw meat.

- An outbreak of anthrax was recorded in a few districts of Orissa (India), including Koraput, in 2021 and the past few years. In July 2021, the ICMR's Bhubaneswar Unit, the Regional Medical Research Centre (RMRC) - has commissioned a study to analyze the implementation of a 'One Health' intervention strategy in order to eradicate the deadly human anthrax by the year 2024 from the soils of tribal district Koraput. The study was expected to initiate a free routine vaccination program against anthrax in the district. Therefore, the implementation of vaccination programs to protect humans from deadly diseases is expected to propel market growth in the region.

- Additionally, as per a research article published in BMC Infectious Diseases Journal in November 2022, the human transmission of anthrax occurs via contact with infected animals through butchering and working with hides or consumption of raw or undercooked meat. The research study stated that the participation in slaughtering and cutting beef of sick cattle in Shandong Province, China, was significantly associated with cutaneous anthrax. Thus, the high probability of people consuming raw or uncooked meat infected with anthrax is anticipated to propel the market growth in the region during the forecast period.

- Therefore, owing to the aforementioned factors, such as the high burden of anthrax, rising vaccination programs, and a high proportion of people consuming raw or uncooked meat, the growth of the studied market is anticipated in the Asia Pacific Region.

Anthrax Vaccine Industry Overview

The anthrax vaccine market is consolidated with a few market players in the human and animal segments. In terms of market share, major players dominate the market. With the rising prevalence of disease and increasing awareness among the public, many new players may enter the market over the forecast period. Some market players are Emergent Bio Solutions Inc., Altimune (Pharmathene Inc.), Proton Biopharma Ltd., Colorado Serum Company, Bayer AG, and Merck & Co. Inc.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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