

## **Vaccine Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2020 - 2029**

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### **Report description:**

The Vaccine Logistics Market size is estimated at USD 3.13 billion in 2024, and is expected to reach USD 4.04 billion by 2029, growing at a CAGR of 5.20% during the forecast period (2024-2029).

The wide variety of new vaccines and immunization schedules and service delivery strategies, the expanding target population, the increased cold-chain infrastructure requirements, and insufficient funding are some of the new realities that may further impact the vaccine transportation market.

The existing systems are struggling to keep pace with the changing landscape of national and international immunization programs, especially after the development of the COVID-19 vaccine, resulting in stock-outs, avoidable wastage, and inadequate cold-chain capacity. All the aforementioned factors have considerable coverage, performance, and cost implications.

Due to the enormous rise in demand for vaccine storage services brought on by the COVID-19 epidemic, pharmaceutical companies focused their efforts on creating cold chain logistics. Therefore, the vaccine cold chain logistics market will probably see new growth prospects in the coming years due to the increasing R&D initiatives.

### Vaccine Logistics Market Trends

#### Growth in the Pharmaceutical Sector

With government initiatives to improve the pharmaceutical industry's growth worldwide and fuel competition within the market, the demand for pharma logistics may increase globally. As strong growth continues across the global pharmaceuticals industry,

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the sub-category of temperature-controlled products is also surging. Pharmaceutical manufacturers around the world are increasingly focusing on product quality and sensitivity. The development of complex biological-based medicines and the shipment of hormone treatments, vaccines, and complex proteins, which require cold chain refinements, result in a need for temperature-controlled transportation and warehousing.

Temperature-controlled logistics for pharmaceutical products and medical devices is a significantly growing segment of the healthcare logistics industry. Moreover, the increase in the need for effective cold chain logistics services to maintain the quality of goods is fueling the growth of the market.

Demand for innovative drugs will drive oncology spending to approximately USD 370 billion by 2027, almost double the current level.

India is the largest provider of generic medicines globally, occupying a 20% share in global supply by volume, and is the leading vaccine manufacturer globally with a market share of 60%.

The rising importance of fast-track assistance in the healthcare sector is also driving the market for pharmaceutical logistics. Moreover, decreasing the distribution cost by creating a single-source distribution channel is boosting the demand for pharmaceutical logistics.

#### Development in Cold Chain Logistics

Thermal stability is not a property of most vaccines, including those used against diphtheria, tetanus, pertussis (DTP), and measles, mumps, and rubella (MMR). Typically, vaccines that are not heat-stable and not properly refrigerated spoil over a short period because these vaccines contain biological matter that degrades when not stored between 2C and 8C. As a result, most vaccines rely on refrigerated or cold-chain distribution, which consists of several stages.

The refrigerated trucks that can hold goods in multiple segments at different temperatures are being developed further and gaining popularity. Cold chain service providers are also installing radio-frequency identification (RFID) and Industrial Internet of Things (IIoT) to help address cold chain inefficiencies by providing increased insights into the location, properties, and condition of sensitive products.

Companies are also developing high-tech containers with a closed temperature-controlled system to deliver temperature-sensitive goods between cargo warehouses and aircraft seamlessly. These containers are specially designed to serve the pharmaceutical industry.

In Aug 2022, Azenta Inc. has agreed to acquire B Medical Systems S.a r.l. and its subsidiaries. This acquisition expands Azenta's cold chain capabilities by providing distinct solutions for safely and traceably transporting temperature-sensitive specimens. As part of Azenta, B Medical will gain substantial knowledge and engineering skills in sample management and an expanded market presence in North America and Europe.

#### Vaccine Logistics Industry Overview

The vaccine logistics market is fragmented and is dominated by international companies, such as Yamato, Deutsche Post DHL Group, and Nippon Express. These international companies are focusing on expansion strategies through acquisitions. Their strong presence helps them expand in the market more easily than the smaller players.

With the COVID-19 pandemic, the market is expected to experience an increased demand for refrigerated warehouses, fast and

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controlled delivery services, and the bulk transportation of vaccines, backed by the increasing government investment providing opportunities to the players in the market to expand their reach and efficiency in the long run.

Additional Benefits:

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

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