

Australia Influenza Vaccine Market Assessment, By Vaccine Type [Inactivated Influenza Vaccine, Live Attenuated Influenza Vaccine], By Type of Influenza [Seasonal and Pandemic], By Formulation [Trivalent, Quadrivalent], By Technology [Egg-based, Cell culture and Recombinant], By Age group [Paediatric and Adult], By Route of Administration [Intra-Muscular Injection, Nasal Spray], By Distribution Channel [Hospital, Retail Pharmacies, Government Suppliers and Others], By Region, By Opportunities and Forecast, 2016-2030F

Market Report | 2024-04-19 | 93 pages | Market Xcel - Markets and Data

AVAILABLE LICENSES:

- Single User License \$3300.00
- Multi-User/Corporate Licence \$4500.00
- Custom Research License \$7000.00

Report description:

Australia Influenza Vaccine Market size was valued at USD 364.92 million in 2022 which is expected to reach USD 532.62 million in 2030 with a CAGR of 4.84% for the forecast period between 2023 and 2030. The factors that are driving the Australian influenza vaccine market are disease prevalence & severity, international collaborations & partnerships, technological advancements, and government initiatives on vaccination programs. As per Australia Influenza Surveillance Report (AISR), a total of 107,941 flu cases were recorded by June 2023. Among these cases, there have been 48,873 instances reported in children under the age of 15, with an additional 22,365 cases occurring specifically in the five to nine-year-old age group.

Collaboration among the government, healthcare providers, and pharmaceutical companies is significantly contributing to the Australian influenza vaccine market. Through these partnerships, efforts are being made to maintain a consistent vaccine supply, enhance distribution networks, and raise public awareness regarding the significance of influenza vaccination. Moreover, progress in vaccine manufacturing technologies has led to increased efficiency and efficacy of influenza vaccines. Vaccine supply & manufacturing constraints, vaccine distribution, and adverse reactions related to influenza vaccine are some of the factors that

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

are hindering the growth of Australia influenza vaccine market.

Collaboration with Pharmaceutical Companies

The Australian government acknowledges the vital significance of influenza vaccination in protecting public health. Collaborations between pharmaceutical companies and the government are underway to collectively develop, produce, and distribute influenza vaccines. These partnerships ensure accessibility, safety, and efficacy of vaccines. The objectives include vaccine supply contracts, research funding, regulatory approvals, and public-private collaborations. Seqirus, the vaccine division of CSL, operates Australia's only domestic facility for influenza vaccine production. CSL collaborates with the government for mRNA vaccine production. Seqirus is conducting extensive research on self-amplifying mRNA technology for influenza vaccine development, with promising pre-clinical results, and plans for human clinical trials in the near future.

Novel Combination Vaccines

Researchers have made significant progress in developing universal influenza antigens by utilizing nano/microparticles as carriers for vaccines. These particles, including polymers, liposomes, metal-based particles, and protein-based particles, have demonstrated immunogenicity and protective effects in animal models such as mice, pigs, ferrets, and chickens. Novel vaccine technologies are exploring the physiochemical properties, fabrication methods, characterization techniques, and biological responses associated with seasonal and universal influenza vaccine formulations incorporating these materials. Advanced delivery platforms are being employed to improve antigen delivery and streamline production processes. Insights from structural biology and immunology are also being leveraged to enhance antigen design and identify more effective adjuvants for an improved immune response.

As an example, in November 2022, Pfizer Inc. and BioNTech SE reported advancements in a Phase 1 clinical trial for a combined mRNA-based vaccine candidate targeting influenza and COVID-19. The vaccine employs microparticles as carriers. This trial aims to evaluate the vaccine's safety and efficacy in a cohort of 180 participants aged 18 to 64 years, with the goal of addressing both respiratory diseases through a single vaccination.

Government Initiatives

The Australian Government has prioritized the prevention and control of influenza through its comprehensive influenza vaccine program. This program aims to protect the Australian population from the seasonal influenza virus by ensuring widespread access to safe and effective vaccines. The government provides free influenza vaccinations to specific at-risk groups, including children, pregnant women, the elderly, and individuals with certain medical conditions. In addition to targeted vaccination efforts, the government also supports community awareness campaigns to promote the importance of getting vaccinated and maintaining good hygiene practices. By implementing this program, the Australian Government demonstrates its commitment to safeguarding public health and reducing the burden of influenza on individuals and healthcare systems across the country.

The Australian Government's Department of Health and Aged Care initiated an 8-week public awareness campaign on April 24, 2023, as part of the National Immunization Program (NIP). The campaign aims to educate the public about the severe consequences of influenza. Annual influenza vaccination commenced in April to provide protection during the peak influenza season, which usually spans from June to September across most regions of Australia.

Demand for Cell Culture-Based Vaccine is Growing

The aim of cell-based influenza vaccines is to create a precise match to the influenza virus strains chosen by the WHO, bypassing any changes that may occur during egg adaptation. As a result, these vaccines have the potential for enhanced effectiveness. Cell-based influenza vaccine technology brings added benefits compared to the conventional manufacturing process, such as improved scalability and faster production in case of an influenza pandemic. During the traditional manufacturing process of egg-based vaccines, there is a risk of strain mutation occurring at multiple stages. This can potentially result in a mismatch between the circulating strains of influenza and the inactivated strains present in the seasonal influenza vaccine.

Australia introduced its inaugural cell-culture-based influenza vaccine in 2021, becoming the country's sole option apart from the traditional egg-based flu vaccine. The Therapeutic Goods Administration approved this vaccine for individuals aged nine years and above. The cell-based vaccine offers numerous benefits compared to egg-based vaccines, including expedited production, improved effectiveness, and a lower risk of contamination.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Quadrivalent Vaccine offers Clinical Benefits over other Formulations

Quadrivalent vaccines offer broader protection against influenza compared to trivalent vaccines. Trivalent vaccines target three strains of the influenza virus (two influenza A strains and one influenza B strain), while quadrivalent vaccines target four strains (two influenza A strains and two influenza B strains). The inclusion of an additional influenza B strain in quadrivalent vaccines improves the match with circulating strains, thereby reducing the risk of infection. The significance of influenza vaccination is gaining more attention among healthcare professionals and the general public. People are increasingly proactive in safeguarding themselves and others from the influenza virus, leading to a higher demand for vaccines.

For example, the Australian Influenza Vaccine Committee (AIVC) has endorsed the usage of Influvac Tetra (2022-2023 formulation), a quadrivalent flu vaccine, for immunizing children aged 6 months and older. This vaccine is developed by Viatris Pty Ltd., an American multinational pharmaceutical and healthcare corporation.

Impact of COVID-19

The COVID-19 pandemic has had a profound influence on the Australian influenza vaccine market. This global health crisis has highlighted the importance of influenza vaccination in reducing the strain on healthcare systems and minimizing the risk of co-infections with COVID-19. In response to these evolving public health needs, various market players are introducing combined vaccines targeting both influenza and COVID-19, aligning immunization efforts accordingly. The COVID-19 pandemic and associated containment measures have significantly impacted the transmission of respiratory viruses, including influenza. The potential for a "syndemic," where influenza and COVID-19 epidemics combine, is a major concern. Currently, Australian authorities recommend a minimum interval of 7 days (previously 14 days) between administering COVID-19 vaccines and influenza vaccines (or vice versa) for the Southern Hemisphere season, unless exceptional circumstances arise.

Key Players Landscape and Outlook

Pharmaceutical companies are involved in mergers and acquisitions, JVs, and extensive collaborations to facilitate the production of influenza vaccines in the country. The major players in the market are seeking to integrate their coronavirus vaccines with the annual flu shots. In addition, executives from various vaccine manufacturers have voiced their anticipation of a gradual shift in the COVID-19 vaccine market, resembling the industry dynamics observed in the flu vaccine sector. Australia's first and only cell-based influenza vaccine, Flucelvax Quad, has received approval for administration to children aged two and older. Originally introduced in 2021, Flucelvax Quad has now been authorized by the Therapeutic Goods Administration (TGA) for expanded use in children as young as two for the 2022 flu season. The utilization of cell-based technology represents a significant advancement in influenza vaccine production methods.

Table of Contents:

1. Research Methodology
2. Project Scope & Definitions
3. Impact of Covid-19 on Australia Influenza Vaccine Market
4. Executive Summary
5. Australia Influenza Vaccine Market Outlook, 2016-2030F
 - 5.1. Market Size & Forecast
 - 5.1.1. By Value
 - 5.1.2. By Volume
 - 5.1.3. By Category
 - 5.1.1.1. Inactivated Influenza Vaccine
 - 5.1.2.1. Live Attenuated Influenza Vaccine
 - 5.2. By Type of Influenza
 - 5.2.1. Seasonal
 - 5.2.2. Pandemic
 - 5.3. By Formulation
 - 5.3.1. Trivalent

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.3.1.1. □Standard Dose Unadjuvanted
- 5.3.1.2. □High Dose Unadjuvanted
- 5.3.1.3. □Adjuvanted
- 5.3.2. □Quadrivalent
 - 5.3.2.1. □Standard Dose Unadjuvanted
 - 5.3.2.2. □Unadjuvanted
- 5.4. □By Technology
 - 5.4.1. □Egg-based
 - 5.4.2. □Cell culture
 - 5.4.3. □Recombinant
- 5.5. □By Age Group
 - 5.5.1. □Paediatric
 - 5.5.2. □Adult
- 5.6. □By Route of Administration
 - 5.6.1. □Intra-muscular injection
 - 5.6.2. □Nasal Spray
- 5.7. □By Distribution Channel
 - 5.7.1. □Hospital
 - 5.7.2. □Retail Pharmacies
 - 5.7.3. □Government Suppliers
 - 5.7.4. □Others
- 5.8. □By Region
 - 5.8.1. □Western Australia
 - 5.8.2. □Northern Territory
 - 5.8.3. □Queensland
 - 5.8.4. □South Australia
 - 5.8.5. □New South Wales
 - 5.8.6. □Victoria
 - 5.8.7. □Tasmania
- 5.9. □By Company Market Share (%), 2022
- 6. □Market Mapping, 2022
 - 7.1. □By Category
 - 7.2. □By Type of Influenza
 - 7.3. □By Formulation
 - 7.4. □By Technology
 - 7.5. □By Age Group
 - 7.6. □By Route of Administration
 - 7.7. □By Distribution Channel
 - 7.8. □By Region
- 8. □Macro Environment and Industry Structure
 - 8.1. □Supply Demand Analysis
 - 8.2. □Import Export Analysis
 - 8.3. □Value Chain Analysis
 - 8.4. □PESTEL Analysis
 - 8.4.1. □Political Factors
 - 8.4.2. □Economic System
 - 8.4.3. □Social Implications

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 8.4.4.□Technological Advancements
- 8.4.5.□Environmental Impacts
- 8.4.6.□Legal Compliances and Regulatory Policies (Statutory Bodies Included)
- 8.5.□Porter's Five Forces Analysis
- 8.5.1.□Supplier Power
- 8.5.2.□Buyer Power
- 8.5.3.□Substitution Threat
- 8.5.4.□Threat from New Entrant
- 8.5.5.□Competitive Rivalry
- 9.□Market Dynamics
- 9.1.□Growth Drivers
- 9.2.□Growth Inhibitors (Challenges and Restraints)
- 10.□Regulatory Framework and Innovation
- 10.1□Clinical Trials
- 10.2□Patent Landscape
- 10.3□Regulatory Approvals
- 10.4□Innovations/Emerging Technologies
- 11.□Key Players Landscape
- 11.1.□Competition Matrix of Top Five Market Leaders
- 11.2.□Market Revenue Analysis of Top Five Market Leaders (in %, 2022)
- 11.3.□Mergers and Acquisitions/Joint Ventures (If Applicable)
- 11.4.□SWOT Analysis (For Five Market Players)
- 11.5.□Patent Analysis (If Applicable)
- 12.□Pricing Analysis
- 13.□Case Studies
- 14.□Key Players Outlook
- 14.1.□Sanofi Pasteur Inc.
- 14.1.1.□Company Details
- 14.1.2.□Key Management Personnel
- 14.1.3.□Products & Services
- 14.1.4.□Financials (As reported)
- 14.1.5.□Key Market Focus & Geographical Presence
- 14.1.6.□Recent Developments
- 14.2.□GlaxoSmithKline PLC.
- 14.3.□AstraZeneca PLC.
- 14.4.□Merck & Co.
- 14.5.□Johnson and Johnson Services Inc.
- 14.6.□Novavax, Inc.
- 14.7.□Gamma Vaccines Pty Ltd.
- 14.8.□F. Hoffmann-La Roche Ltd.
- 14.9.□CSL Limited. (Seqirus)
- 14.10.□Takeda Pharmaceutical Company Limited.

*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

- 15.□Strategic Recommendations
- 16.□About Us & Disclaimer

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Australia Influenza Vaccine Market Assessment, By Vaccine Type [Inactivated Influenza Vaccine, Live Attenuated Influenza Vaccine], By Type of Influenza [Seasonal and Pandemic], By Formulation [Trivalent, Quadrivalent], By Technology [Egg-based, Cell culture and Recombinant], By Age group [Paediatric and Adult], By Route of Administration [Intra-Muscular Injection, Nasal Spray], By Distribution Channel [Hospital, Retail Pharmacies, Government Suppliers and Others], By Region, By Opportunities and Forecast, 2016-2030F

Market Report | 2024-04-19 | 93 pages | Market Xcel - Markets and Data

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$3300.00
	Muti-User/Corporate Licence	\$4500.00
	Custom Research License	\$7000.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

☐ ** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*

Phone*

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2025-05-05"/>
		Signature	<input type="text"/>