# Japan Influenza Vaccine Market Assessment, By Type of Vaccine [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, FY2017-FY2031

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**Report description:**

Japan Influenza Vaccine Market size was valued at USD 143.2 million in FY2023 which is expected to reach USD 253.88 million in FY2031 with a CAGR of 7.42% for the forecast period between FY2024 and FY2031. Several factors are propelling the expansion of the influenza vaccine market in Japan such as the widespread occurrence of influenza, increased government attention on immunization initiatives, the emergence of novel vaccines, and advancements in vaccine delivery technologies. Japan influenza vaccine market has witnessed a growing emphasis on expanding vaccine coverage and accessibility in recent years. The government has implemented initiatives to encourage vaccination, particularly among high-risk populations such as the elderly, young children, and individuals with underlying health conditions. Moreover, vaccination programs have been introduced in schools and workplaces to enhance overall vaccine adoption.
Prominent pharmaceutical companies and vaccine manufacturers are playing an active role in the Japanese influenza vaccine market, working diligently to meet the increasing demand for vaccines that are both safe and effective. Continuous research and development endeavours are pursued to enhance vaccine efficacy and provide broader protection against diverse influenza

strains.

Increased Prevalence of Influenza

The Japanese Health Ministry, in February 2023 announced that the number of flu patients across the country had reached epidemic levels for the first time in 3 years. As per data released by the National Institute of Infectious Diseases, the average number of patients per medical institution nationwide came to 10.36, surpassing the warning level benchmark of 10 per institution. Nearly 5,000 regularly monitored institutions in Japan's 47 prefectures reported more than 51,000 influenza cases during the 7-day period. By prefecture, the per hospital number was highest in Okinawa at 41.23, which was followed by Fukui at 25.38, Osaka at 24.34 and Fukuoka, which stood at 21.70. Experts warned that flu infections could further spread unlike normal years after stern COVID-19 countermeasures that helped in keeping flue infections under control in 2021 and 2022.

Partnerships and Collaborations Between Pharmaceutical Companies

Japanese influenza vaccine market has witnessed a notable increase in partnerships and collaborations among pharmaceutical companies. These alliances are driven by the shared goal of addressing the growing demand for influenza vaccines and leveraging combined expertise to enhance production, distribution, and market reach. Partnerships allow companies to pool their resources, infrastructure, and research capabilities to accelerate vaccine development and improve manufacturing efficiency. These partnerships also facilitate knowledge sharing, regulatory compliance, and streamlined supply chain management. Ultimately, the increasing number of partnerships among pharma companies in the Japan influenza vaccine market contributes to a stronger market presence, improved vaccine availability, and a higher level of public health protection against influenza outbreaks.

In 2020, Takeda and Novavax announced their collaboration in 2020 for the development, production, and distribution of NVX-CoV2373 in Japan. Takeda received financial support from the Ministry of Health, Labour and Welfare (MHLW) of the Japanese government. This funding was intended to aid Takeda in technology transfer, establishing necessary infrastructure, and expanding its manufacturing capabilities.

Technological Advancements

Technological advancements in the Japan Influenza Vaccine Market have been rapidly transforming the landscape of vaccine production and distribution. Cutting-edge technologies such as recombinant DNA technology and cell-based vaccine production are gaining prominence, allowing for faster and more efficient manufacturing processes. Additionally, advancements in vaccine formulation and delivery systems are enhancing vaccine effectiveness and reducing side effects. The utilization of advanced genetic sequencing techniques enables a better understanding of influenza strains and helps in the development of targeted and highly effective vaccines. Furthermore, the integration of digital solutions and artificial intelligence is streamlining vaccine distribution logistics, ensuring efficient supply chain management and timely vaccinations. Overall, these technological advancements are playing a pivotal role in bolstering the Japan Influenza Vaccine Market and improving public health outcomes.

Novavax is employing artificial intelligence (AI) to determine the appropriate dosage for their COVID-influenza vaccine trials. The utilization of AI played a crucial role in designing both the phase 1 and phase 2 trials. A design of experiments methodology was employed to aid in the selection of the optimal dosage during the trial process.

Government Initiatives

The government has implemented several significant initiatives that indirectly support and enhance the Japan influenza vaccine market. Recognizing the importance of preventive healthcare, the government has focused on promoting vaccination campaigns and increasing public awareness about the benefits of influenza vaccines. Japanese government has entered into numerous collaborations with pharmaceutical companies aiming to combat the spread of influenza within the country. To ensure an ample supply of influenza vaccines, the Japanese government frequently establishes supply agreements with pharmaceutical companies. These agreements typically consist of long-term contracts, in which the government commits to purchasing a specific quantity of vaccine doses from the companies. In exchange, the companies undertake the responsibility of manufacturing and delivering the vaccines promptly.

In 2020, the Japanese government collaborated with Daiichi Sankyo through a supply agreement for influenza vaccines. The agreement focused on providing a specified number of influenza vaccine doses to fulfill the government's needs. The primary objective was to guarantee an ample supply of vaccines and contribute to nationwide immunization efforts against influenza.

Nasal Influenza Vaccines to Grow Rapidly

The nasal influenza vaccine has been gaining popularity in Japan due to several factors. One key reason is its convenience and

ease of administration compared to traditional injectable vaccines. The nasal vaccine eliminates the need for needles, making it more appealing to individuals, particularly children and those with needle phobia. Moreover, the nasal vaccine offers potential advantages in terms of immunological response, as it stimulates both systemic and mucosal immunity, providing a broader defense against influenza viruses. The nasal route of administration also mimics the natural route of infection, leading to a more robust immune response. Furthermore, the nasal vaccine's effectiveness in preventing influenza and reducing transmission has been demonstrated through clinical trials and real-world studies. As a result, the increasing popularity of nasal influenza vaccines in Japan is leading to increase in the growth of Japan influenza vaccine market.

A panel of experts under the  health ministry gave its approval for a nasal influenza vaccine designed for children aged 2 to 18. This approval marked a significant milestone as it is the first-ever approval of a nasal spray vaccine in Japan. The health ministry is expected to grant official approval for the vaccine, with the process anticipated to conclude by late March. Developed by AstraZeneca, FluMist is a live attenuated vaccine that includes four different strains of the flu virus.

Utilization of Inactivated Vaccine is Experiencing a Growing Trend

The adoption of inactivated influenza vaccines is on the rise due to their vital role in controlling the transmission of the flu virus. Inactivated vaccines are created using non-living strains of the flu virus and are known for their high effectiveness. One significant advantage of these vaccines is the safety they provide to recipients. As the virus strains used in their production are inactive, they  are incapable of causing a flu infection. This makes inactivated vaccines suitable for individuals who are at a higher risk of experiencing severe complications, including pregnant women, people with compromised immune systems, and children. The administration of the vaccine typically involves an injection, usually as a single dose. Eventually, the growing trend of inactivated vaccines has led to increasing growth in Japan influenza vaccine market.

Microbial Diseasesk H A (2022-2023 formula), developed by BIKEN Co., Ltd, a research institute for Microbial Diseases, is an inactivated influenza vaccine that can be administered intramuscularly in children.

Impact of COVID-19

The COVID-19 pandemic has had a profound impact on the Japan influenza vaccine market. One notable effect is the heightened awareness and importance of vaccination in general. The global health crisis has underscored the significance of preventive measures and the need for robust immunization programs. This increased awareness has translated into greater demand for influenza vaccines in Japan. Furthermore, the pandemic has prompted healthcare authorities and organizations to develop more efficient and streamlined vaccination strategies, including expan ded vaccination campaigns and improved distribution networks.

Pharmaceutical and biotechnology companies in Japan have been actively exploring the development of combined vaccines targeting both COVID-19 and influenza. Recognizing the potential benefits of a single vaccine that offers protection against multiple respiratory viruses, these companies are leveraging their expertise in vaccine research and development.

Key Players Landscape and Outlook

Pharmaceutical companies in Japan are engaging in mergers and acquisitions, joint ventures, and extensive collaborations for the manufacturing of universal flu vaccines. The dominant market players are aiming to develop a universal vaccine, which is designed to provide effective protection against all strains of the flu, irrespective of the specific subtype, antigenic drift, or antigenic shift of the virus. Numerous companies are investing in research for universal vaccine.

In April 2020, Sumitomo Dain ippon Pharma Co., Ltd., a pharmaceutical company based in Japan, and the National Institutes of Biomedical Innovation, Health and Nutrition have announced the signing of a collaborative research agreement. The objective of this agreement is to work together towards the practical implementation of a universal influenza vaccine that offers enhanced protection against a wide range of influenza strains.

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