India Human Papillomavirus Vaccine Market Assessment, By Type [Bivalent, Quadrivalent, Nonavalent], By Disease Indication [Cervical Cancer, Anal Cancer, Vulvar and Vaginal Cancer, Penile Cancer, Oropharyngeal Cancer, Others], By Method of synthesis [Nucleic acid-based, Peptide-based, Protein-based, Cell-based, Live-vector Vaccine], By Distribution Channel [Hospital, Retail Pharmacy, Online Pharmacy, Non-Governmental Organisations], By Region, Opportunities and Forecast, FY2017-FY2031F

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Report description:

India human papillomavirus vaccine market is projected to witness a CAGR of 11% during the forecast period FY2024-FY2031, growing from USD 1.3 billion in FY2023 to USD 3 billion in FY2031. Several factors are contributing to the growing market size, including a rise in awareness about the importance of HPV vaccination due to the increasing prevalence of cervical cancer and other diseases associated with HPV. In addition, various government-led initiatives and vaccination programs, as well as advancements in vaccine development technology, have played a crucial role in increasing awareness about vaccination.
In recent years, India human papillomavirus vaccine market has experienced substantial growth, driven by an increasing recognition of the significance of preventing HPV infections and their associated diseases. Cervical cancer, a leading cause of concern for millions of women in India, is primarily linked to HPV, a common sexually transmitted infection. The increasing awareness about the benefits of HPV vaccination and its potential to reduce the burden of cervical cancer has resulted in a surge in demand for HPV vaccines in India. In response, the Indian government and various healthcare organizations have undertaken numerous initiatives and vaccination programs to promote widespread vaccine adoption, with a particular focus on young girls

and women.

Furthermore, advancements in vaccine development technology have paved the way for the introduction of more effective and accessible vaccines in India human papillomavirus vaccine market. These breakthroughs have instilled confidence among healthcare providers and individuals regarding the efficacy and safety of HPV vaccination. The rising popularity of HPV vaccines in India signals a promising step forward in the effort to combat HPV infections and safeguard the well-being of women across the country, positively impacting the India human papillomavirus vaccine market.

In December 2023, the Family Planning Association of India (FPAI) initiated a nationwide HPV vaccination drive for girls and women to protect them against cervical cancer. The campaign's objective is to vaccinate over 20,000 women and girls through the FPAI's 40 branches spread across the country.

Increasing Awareness About HPV Immunization

Increasing awareness about the importance of HPV vaccination has led to significant growth of India human papillomavirus vaccine market. While efforts implemented by governments and healthcare organizations have increased screening for cervical cancer, the primary prevention achieved through HPV immunization has played a crucial role in diminishing the cervical cancer burden in India. The effectiveness of these strategies has been evident not only in high-income countries (HICs) but has also resulted in higher rates of adoption of the HPV vaccine and widespread approval in low- and lower-middle-income countries (LLMICs). International collaborations between WHO, United Nations Population Fund, UN Women, and the IPVS (Indian Post Visibility System), along with healthcare providers who are trusted sources of health advice, persist in their efforts to inform and promote HPV immunization. In the context of school-based vaccination programs, educators, school administrators, and the Ministry of Education also play a crucial role in conveying the advantages of HPV vaccination.

Increasing Incidence of HPV-related diseases

According to the National Cancer Registry Programme of the Indian Council of Medical Research, the estimated number of cervical cancer cases in India was over 340,000 in 2023. The incidence will further increase in the coming years because of factors such as smoking and excessive alcohol consumption, urbanization and changing lifestyles, delayed childbearing and multiple sexual partners, limited access to quality healthcare and diagnostic facilities in certain regions of India, and cultural taboos and stigmatization of certain cancers and sexually transmitted infections. This way, increasing incidences of HPV-related diseases will continue to have a positive effect on India human papillomavirus vaccine market.

Government Initiatives

Government initiatives has greatly influenced the India human papillomavirus vaccine market. The Indian government has taken proactive and comprehensive measures to tackle the public health challenge posed by human papillomavirus (HPV) infections. The primary goal of these initiatives is to increase awareness about the advantages of HPV vaccination and ensure broad vaccine coverage, with a specific focus on young girls and women. In addition to conducting awareness campaigns, the government has initiated vaccination programs and several educational initiatives to distribute information about HPV, its risks, and preventive measures.

In December 2022, the National Technical Advisory Group for Immunization (NTAGI) recommended the inclusion of the HPV vaccine in the Universal Immunization Programme (UIP). The plan involved a one-time catch-up vaccination for 9-14-year-old adolescent girls, followed by routine introduction at 9 years of age. To facilitate this vaccination drive, schools played a significant role in the implementation, adopting a grade-based approach for girls in 5th to 10th grades.

Quadrivalent Vaccines are Witnessing Rapid Growth in Demand

Increasing demand for quadrivalent vaccines has caused growth in India human papillomavirus vaccine market. The quadrivalent HPV vaccine consists of a combination of four HPV type-specific Virus-Like Particles (VLPs) derived from HPV 6, 11, 16, and 18 L1 proteins, along with an aluminum adjuvant. Clinical trials have demonstrated the vaccine's remarkable efficacy in preventing persistent HPV infection, cervical cancer precursor lesions, vaginal and vulvar cancer precursor lesions, and genital warts caused by HPV types 6, 11, 16, or 18 in females who have not been previously infected with the respective HPV type. It is essential to note that the vaccine does not offer protection against diseases caused by HPV types that females may already be infected with at the time of vaccination. Gardasil, a quadrivalent vaccine developed by Merck & Co. in October 2022, revealed the initial results of the clinical trial to test for two versus three doses of Gardasil vaccine in India. The clinical trials were carried out by All India Institute of Medical Sciences, New Delhi, in collaboration with several other institutes and hospitals.

High Prevalence and Government Initiatives for HPV in Eastern Region

In the Eastern region, cervical cancer is growing at a rapid rate. The district of Papumpare in the Indian state of Arunachal Pradesh has the highest incidence rate of cervical cancer (AAR-27.7) in Asia, according to the National Cancer Registry Programme. Mizoram's Aizawl district came next, with an incidence of AAR-27.3, followed by Arunachal Pradesh's Pasighat district, with an incidence of AAR-20.3. To reduce the prevalence of HPV, the central and state governments have started various initiatives aimed towards increasing awareness about HPV and increasing immunization drives. For example, Sikkim state made a landmark decision to be the first state in India to introduce HPV vaccine statewide. In June 2023, the Union Health Ministry administered the human papillomavirus (HPV) vaccine in the Mizoram state as a part of the universal immunization program.

Future Market Scenario (2024 - 2031F)

- Increased awareness and education campaigns regarding the link between HPV and cervical cancer in India are expected to boost the adoption rate of the vaccine in the India human papillomavirus vaccine market.
- The India human papillomavirus vaccine market may be greatly impacted by the government's efforts to promote HPV vaccination, whether by including it in national immunization programs or by providing financial assistance.
- Future advancements in vaccination science may lead to the development of HPV vaccinations that offer protection against new virus strains. As a result, the India human papillomavirus vaccine market may become more effective, increasing their public appeal, and maybe expanding the age range of individuals who can receive vaccinations.
- Collaboration between vaccine producers, authorities, non-governmental organizations, and healthcare professionals in the India human papillomavirus vaccine market may expand the availability of HPV vaccines throughout the country, particularly in rural and impoverished areas.

Key Players Landscape and Outlook

India human papillomavirus vaccine market is undergoing a notable transformation, marked by a rising trend of mergers and collaborations among pharmaceutical firms and research institutions. These strategic partnerships are emerging as pivotal catalysts propelling the progress of HPV vaccine development, production, and distribution in India. Considering the increasing demand for HPV vaccines and the mounting recognition of their significance in cervical cancer and HPV-linked ailments, notable players within India's pharmaceutical sector are embracing the potency of collaboration.

For instance, in January 2023, India celebrated a significant milestone with the launch of its first domestically developed Quadrivalent Human Papillomavirus vaccine (qHPV) named 'CERVAVAC.' This achievement was made possible through a collaborative effort between the Serum Institute of India (SII), the Department of Biotechnology (DBT), the Biotechnology Industry Research Assistance Council (BIRAC), and the Bill and Melinda Gates Foundation. 'CERVAVAC' promises to play a crucial role in preventing HPV infections and associated diseases.

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