

United Kingdom Monkeypox Therapeutics Market By Treatment (Smallpox Vaccine, Antivirals, Vaccinia Immune Globulin (VIG)), By End User (Hospitals, Specialty Clinics, Ambulatory Surgical Centers, Others), By Region, Competition, Forecast & Opportunities, 2019-2029F

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Report description:

United Kingdom Monkeypox Therapeutics Market was valued at USD 18.38 Million in 2023 and is expected to reach USD 26.58 Million by 2029 with a CAGR of 6.54% during the forecast period. The United Kingdom (UK) Monkeypox therapeutics market is witnessing significant developments as the country navigates the challenges posed by the emerging and re-emerging Monkeypox outbreaks. This market is shaped by a combination of factors including regulatory actions, public health strategies, and the increasing demand for effective therapeutic solutions. As the UK grapples with Monkeypox, understanding the dynamics of its therapeutics market is crucial for stakeholders including healthcare providers, pharmaceutical companies, and policymakers. The recent increase in Monkeypox cases, particularly in non-endemic regions, has heightened the focus on developing and deploying effective therapeutics. The UK has experienced sporadic outbreaks, which have amplified the demand for targeted interventions and treatments to manage and prevent the disease.

The UK government has played a pivotal role in shaping the Monkeypox therapeutics market through various initiatives. This includes funding for research and development (R&D) aimed at advancing the discovery and production of Monkeypox-specific treatments and vaccines. Agencies such as the Department of Health and Social Care (DHSC) and Public Health England (PHE) are actively involved in supporting these efforts.

Despite positive developments, the UK Monkeypox therapeutics market faces several challenges. One significant issue is the limited availability of approved treatments and vaccines. The supply of these therapeutics is constrained by production capacity and distribution logistics. Additionally, the cost of R&D and the regulatory hurdles associated with new drug approvals can impact the pace at which new solutions become available.

Furthermore, ensuring equitable access to therapeutics across different regions, including remote and underserved areas,

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remains a challenge. Addressing these issues is critical to achieving comprehensive disease management and preventing outbreaks.

Key Market Drivers

Increasing Incidence of Monkeypox Cases

Recent years have witnessed a notable uptick in Monkeypox cases both globally and within the UK. The disease, characterized by its symptoms similar to those of smallpox, has expanded beyond its traditional geographic boundaries, impacting new regions and demographics. In response, the UK has seen a heightened focus on addressing the threat posed by Monkeypox through the development and deployment of targeted therapeutics.

The growing number of Monkeypox cases has driven significant market activity. As outbreaks become more frequent and widespread, there is a heightened demand for effective antiviral drugs and vaccines. This increased demand is propelling growth in the Monkeypox therapeutics market, as healthcare providers and pharmaceutical companies work to develop and deliver solutions that can manage and mitigate the impact of the disease.

According to a report published by gov.uk in 2024, mpox cases acquired within the UK have been confirmed in England since May 6, 2022. The outbreak has predominantly affected gay, bisexual, and other men who have sex with men, without a documented history of travel to endemic regions. Positive samples identified by a mpox polymerase chain reaction (PCR) test are classified as confirmed cases, while samples positive for an orthopox PCR test, which includes mpox, are classified as highly probable cases. The reported figures combine both classifications.

As of December 31, 2022, there were 3,732 confirmed and highly probable mpox cases in the UK, with 3,553 cases in England, 34 in Northern Ireland, 97 in Scotland, and 48 in Wales. In 2023 and up to July 31, 2024, a total of 286 mpox cases have been reported in the UK. Of these, 269 were in England (116 cases were presumed to have been acquired within the UK, 82 were acquired abroad, and 71 are pending classification), 11 were in Scotland (7 were imported cases, 3 were presumed to have been acquired in the UK, and 1 is pending classification), 1 was in Wales (an imported case acquired outside the UK), and 5 were in Northern Ireland (1 was presumed to have been acquired in the UK, 1 was an imported case, and 3 are pending classification). The UK government has been proactive in addressing the challenges posed by the increasing incidence of Monkeypox. Key initiatives include the acceleration of regulatory processes for the approval of therapeutics and vaccines. The Medicines and Healthcare products Regulatory Agency (MHRA) has streamlined approval pathways for drugs and vaccines, including those repurposed from smallpox treatments, to ensure that effective solutions are available promptly.

Additionally, the government has invested in research and development (R&D) to advance the discovery and production of Monkeypox-specific therapeutics. Funding from public health bodies such as the Department of Health and Social Care (DHSC) has been directed towards enhancing the R&D pipeline, fostering innovation, and supporting the development of new treatment modalities.

As Monkeypox cases rise, public awareness campaigns and vaccination programs are being intensified. Health authorities are focusing on educating the public about the disease and the availability of preventive measures. These efforts are driving demand for vaccines and therapeutics, thereby fueling market growth.

The UK government has established stockpiles of smallpox vaccines and antiviral medications to ensure rapid response during outbreaks. This strategic preparedness is vital for managing increased case numbers and has a direct impact on the therapeutics market by ensuring that critical resources are readily available.

The rising incidence of Monkeypox has spurred increased investment in R&D aimed at developing new therapeutics and optimizing existing ones. Pharmaceutical companies are focusing on advancing drug formulations and improving vaccine efficacy, which is contributing to market expansion.

Advances in Therapeutic Research

The rapid progression in research and development (R&D) is at the forefront of driving the monkeypox therapeutics market in the UK. The nation's robust scientific infrastructure, comprising leading pharmaceutical companies, research institutions, and academic bodies, is instrumental in pushing the boundaries of therapeutic innovation. Researchers are focusing on developing novel antivirals, vaccines, and monoclonal antibodies tailored to combat monkeypox effectively.

In March 2024, a new mpox vaccine is undergoing trials in the UK as the virus persists globally. The mPower trial, conducted by the NIHR Clinical Research Network (CRN) and sponsored by Moderna, is evaluating the effectiveness of an investigational mRNA

vaccine for mpox. Since 2022, there has been a notable increase in mpox transmission within the UK. Common symptoms of mpox include a rash with painful blisters, fever, chills, muscle aches, swollen lymph nodes, and a sore throat.

Advanced research methodologies, such as high-throughput screening, genomic analysis, and computational modeling, are enhancing the discovery and optimization of new therapeutic candidates. These technologies allow for a more efficient identification of potential treatments and accelerate the progression from preclinical studies to clinical trials. As a result, the therapeutic pipeline for monkeypox is expanding, with promising candidates moving closer to market availability.

The advancement of monkeypox therapeutics in the UK is significantly driven by collaborative efforts and strategic partnerships. Pharmaceutical companies, academic institutions, and public health organizations are working together to accelerate research and development. These partnerships facilitate the sharing of knowledge, resources, and data, leading to more rapid and effective therapeutic innovations.

For example, collaborations between UK-based pharmaceutical firms and global health organizations have led to the development of cutting-edge vaccines and antiviral treatments. These partnerships also help streamline the clinical trial process, enabling the rapid testing and approval of new therapeutics.

The UK's regulatory framework supports and accelerates the development of new therapeutics through streamlined approval processes. The Medicines and Healthcare products Regulatory Agency (MHRA) plays a crucial role in expediting the review and approval of monkeypox treatments. The agency's commitment to regulatory agility ensures that promising therapeutics are assessed efficiently, allowing for quicker market entry.

Clinical trials conducted in the UK are critical for validating the efficacy and safety of new treatments. The country's advanced clinical research infrastructure, including specialized research centers and trial networks, supports the rigorous testing of therapeutic candidates. Successful trials not only advance the development of new treatments but also enhance the market's growth potential.

Key Market Challenges

Economic and Budgetary Constraints

The development of new therapeutics for Monkeypox requires substantial financial investment in research and development (R&D). Pharmaceutical companies and research institutions face high costs associated with clinical trials, regulatory approvals, and manufacturing processes. In a market with relatively low incidence rates compared to other infectious diseases, the return on investment for developing Monkeypox therapeutics may appear limited. This economic reality can deter companies from investing heavily in R&D for new treatments. As a result, the market may experience a shortage of innovative therapeutic options, hindering the UK's ability to address Monkeypox outbreaks comprehensively.

The allocation of funds to public health programs in the UK is influenced by broader economic conditions and government budgetary priorities. In times of economic uncertainty or financial constraints, public health budgets may face cuts or reallocations. This can impact funding available for purchasing and stockpiling Monkeypox therapeutics, as well as for implementing prevention and treatment programs. Budget constraints can lead to reduced availability of essential medicines and limit the resources allocated to managing outbreaks effectively. Ensuring that adequate funding is available for Monkeypox therapeutics amidst competing public health needs is a critical challenge for policymakers.

Economic constraints can also affect the procurement and distribution of Monkeypox therapeutics. The costs associated with acquiring and distributing therapeutics can be significant, particularly when ensuring a supply chain that reaches remote or underserved areas. Budget limitations may result in delays or shortages in the availability of therapeutics, impacting the ability of healthcare providers to manage and treat Monkeypox cases promptly. Efficient procurement and distribution systems are essential for ensuring that therapeutics are accessible where they are most needed, but financial constraints can compromise these systems.

Funding for research into Monkeypox therapeutics is crucial for advancing treatment options and improving outcomes. However, economic constraints can limit the availability of grants and subsidies for research institutions and pharmaceutical companies. This lack of funding can slow the pace of innovation and delay the development of new and more effective therapeutics. To overcome this challenge, increased investment in research and strategic partnerships between public and private sectors are necessary to support the development of novel treatments and enhance the therapeutic landscape.

Key Market Trends

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Public Awareness and Health Campaigns

One of the primary objectives of public awareness campaigns is to drive engagement and educate the public about monkeypox. These campaigns aim to provide clear, accurate, and accessible information regarding the nature of the disease, its symptoms, transmission routes, and preventive measures. By leveraging various media platforms, including television, social media, and print media, the UK government and health organizations are working to reach a broad audience. The focus on education helps demystify monkeypox, reduce stigma, and encourage timely medical consultation and reporting.

A significant component of the public awareness strategy is the promotion of vaccination and adherence to therapeutic protocols. Campaigns are designed to highlight the importance of vaccination in preventing monkeypox and to address any vaccine hesitancy. By providing information on vaccine safety and efficacy, the UK aims to increase vaccination rates and, consequently, reduce the incidence of monkeypox. Similarly, public health messages emphasize the importance of following prescribed therapeutic regimens to ensure optimal outcomes for those affected by the disease.

Public awareness campaigns are integral to the UK's response strategy during monkeypox outbreaks. Rapid dissemination of information helps to mobilize resources, coordinate responses, and guide public behavior in crisis situations. During an outbreak, timely updates on the spread of the disease, availability of treatments, and preventive measures are essential. This approach not only supports individual health but also aids in controlling the spread of the virus, thereby reducing the overall burden on the healthcare system.

Misinformation and stigma can significantly hinder public health efforts. The UK's health campaigns are designed to counteract misinformation by providing evidence-based information and clarifying misconceptions about monkeypox. Addressing stigma is also a key focus, as negative perceptions can discourage individuals from seeking medical help or participating in preventive measures. By promoting an inclusive and factual narrative, these campaigns work to create a supportive environment for affected individuals and enhance overall public health engagement.

Segmental Insights

Treatment Insights

Based on Treatment, Smallpox Vaccine have emerged as the fastest growing segment in the United Kingdom Monkeypox Therapeutics Market in 2023. The smallpox vaccine, originally developed to combat smallpox, has demonstrated significant efficacy in providing cross-protection against Monkeypox. Both diseases are caused by viruses within the Orthopoxvirus genus, which share genetic and antigenic similarities. Consequently, the smallpox vaccine not only prevents smallpox but also offers substantial protection against Monkeypox. This cross-protection has been validated through studies and historical data, reinforcing the vaccine's relevance in combating Monkeypox.

The vaccine's proven effectiveness has led to its rapid adoption as a preventive measure in the UK. Given the rise in Monkeypox cases and the vaccine's ability to mitigate the disease, it has become a cornerstone of the UK's therapeutic strategy, driving its prominence in the market.

Regulatory agencies in the UK, including the Medicines and Healthcare products Regulatory Agency (MHRA), have facilitated the rapid approval of smallpox vaccines for use against Monkeypox. The streamlined regulatory processes and emergency use authorizations have accelerated the availability of these vaccines, allowing them to be quickly integrated into public health strategies.

This regulatory support has been instrumental in the rapid growth of the smallpox vaccine segment. By expediting the approval process, the UK has ensured that effective preventive measures are readily accessible, thereby boosting market growth and expanding the vaccine's role in Monkeypox therapeutics.

End User Insights

Based on End User, Hospitals have emerged as the fastest growing segment in the United Kingdom Monkeypox Therapeutics Market during the forecast period. The surge in monkeypox cases has significantly impacted the demand for effective therapeutics and specialized medical care. Hospitals, as key healthcare institutions, are at the forefront of managing and treating monkeypox cases. The increasing incidence of the disease necessitates a robust healthcare response, positioning hospitals as central players in the therapeutics market.

The complexity and severity of monkeypox symptoms often require advanced medical interventions that are best managed within hospital settings. Hospitals are equipped with the necessary infrastructure, including isolation units, intensive care facilities, and

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specialized medical staff, to provide comprehensive care for patients. This growing demand for hospital-based treatment drives the expansion of the therapeutics market within these institutions.

Hospitals are uniquely positioned to address the monkeypox outbreak due to their specialized infrastructure and expertise. They offer a range of resources and services essential for effective disease management, including diagnostic testing, treatment administration, and patient monitoring. The ability of hospitals to provide integrated care, including antiviral treatments and supportive therapies, enhances their role in the monkeypox therapeutics market.

Additionally, hospitals often serve as centers for clinical trials and research, contributing to the development and evaluation of new treatments. Their capacity to conduct rigorous clinical research accelerates the introduction of innovative therapeutics and drives market growth. The specialized knowledge and capabilities of hospital staff further support the effective use of these new treatments.

Regional Insights

Based on Region, London have emerged as the dominating region in the United Kingdom Monkeypox Therapeutics Market in 2023. London boasts a highly developed healthcare infrastructure that is pivotal in its dominance within the Monkeypox Therapeutics Market. The city is home to world-renowned medical institutions, such as the Royal Free Hospital and St. Thomas' Hospital, which are equipped with cutting-edge facilities and expertise in infectious disease management. These institutions play a crucial role in diagnosing, treating, and researching Monkeypox, providing a strong foundation for the development and deployment of therapeutics. The concentration of high-quality healthcare resources in London facilitates rapid response to outbreaks and supports the effective management of Monkeypox cases.

The presence of prestigious research institutions and universities in London, including Imperial College London and University College London, drives the city's prominence in the Monkeypox therapeutics sector. These institutions are at the forefront of biomedical research and innovation, contributing to the development of new therapeutic solutions for Monkeypox. The collaboration between academic researchers and pharmaceutical companies in London fosters an environment of innovation, leading to advancements in therapeutic options and the acceleration of clinical trials. This research excellence enhances London's position as a leader in the Monkeypox Therapeutics Market.

London benefits from significant support from government agencies and public health organizations that are instrumental in addressing Monkeypox outbreaks. The city's role as the capital of the UK means it is a focal point for national public health initiatives and emergency response strategies. Agencies such as Public Health England and the Department of Health and Social Care are based in London, providing coordinated efforts in managing Monkeypox outbreaks, including the procurement and distribution of therapeutics. The strategic location of these agencies ensures that London is at the center of decision-making and resource allocation for therapeutic interventions.

Key Market Players

- Chimerix UK Limited
- SIGA Technologies, Inc.
- Emergent BioSolutions UK Ltd.
- Bavarian Nordic A/S
- Mylan N.V.
- Olon S.p.A.
- Teva UK Limited

Report Scope

In this report, the United Kingdom Monkeypox Therapeutics Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

□□United Kingdom Monkeypox Therapeutics Market, By Treatment:

- o Smallpox Vaccine
- o Antivirals
- o Vaccinia Immune Globulin (VIG)

□□United Kingdom Monkeypox Therapeutics Market, By End User:

- o Hospitals

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- o Specialty Clinics
- o Ambulatory Surgical Centers
- o Others

□□United Kingdom Monkeypox Therapeutics Market, By Region:

- o Scotland
- o South-East
- o London
- o South-West
- o East-Anglia
- o Yorkshire & Humberside
- o East Midlands

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the United Kingdom Monkeypox Therapeutics Market.

Available Customizations:

United Kingdom Monkeypox Therapeutics Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

□□Detailed analysis and profiling of additional market players (up to five).

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