

U.S. Vaccines Market By Technology Type (Inactivated Vaccines, Toxoid Vaccines, Recombinant and Conjugate Vaccines, Live Attenuated Vaccines, Others) , By Indication (Pneumococcal Disease, Influenza, Human Papilloma Virus, Meningococcal Disease, Rotavirus, Varicella, Measles, Mumps, and Rubella, Diphtheria, Pertussis, and Tetanus (DTP) , Polio, Hepatitis, Other Indications) By End User (Pediatric, Adults, Travelers) : Opportunity Analysis and Industry Forecast, 2024-2033

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Report description:

The U.S. vaccines market was valued at \$16.4 billion in 2023, and is projected to reach \$29.1 billion by 2033, growing at a CAGR of 5.9% from 2024 to 2033.

Vaccine is a biological preparation that provides acquired immunity to a particular infectious disease. It contains antigens, which are weakened or inactivated forms of the pathogen, or pieces of the pathogen such as proteins or sugars. When administered, vaccines stimulate the body's immune system to recognize and fight the targeted pathogen, preparing it for future encounters. This proactive approach helps prevent the onset of diseases that can cause significant morbidity and mortality.

Alarming increase in prevalence of infectious diseases, including seasonal flu, influenza, shingles, and pneumonia, has spurred demand for vaccines to prevent outbreaks and mitigate public health risks. According to the Centers for Disease Control and Prevention, seasonal flu infections in the U.S. lead to an average of 140,000 to 710,000 hospitalizations annually, which drives the demand for annual flu vaccines. In addition, U.S. government initiatives, such as the Vaccines for Children program, which provides vaccines at no cost to eligible children, and adult immunization programs, promote access to vaccines, ensuring higher vaccination rates across various population segments and thus driving the market growth. The continuous growth of the vaccine pipeline, with new vaccines targeting diseases like malaria, Zika, and cancer, helps meet unmet medical needs and addresses

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emerging infectious diseases, further expanding market opportunities. Moreover, the aging U.S. population is significantly augmenting the demand for vaccines like shingles, pneumococcal, and influenza vaccines, as older individuals are more vulnerable to such infections. According to the National Institute on Aging (NIA) in 2020, the U.S. population aged 65 and older is expected to grow from 54 million in 2019 to 94.7 million by 2060. This demographic shift is expected to drive demand for vaccines targeting older adults, including vaccines for shingles and pneumonia. Furthermore, increased awareness and education about the benefits of vaccination, supported by public health campaigns, drive higher vaccination rates and encourage more individuals to get vaccinated against common preventable diseases. However, high costs associated with vaccine research, development, and manufacturing can limit the availability and affordability of vaccines, especially for emerging diseases or smaller market segments. Moreover, public skepticism about vaccine safety, fueled by misinformation and fear, poses a significant barrier to achieving high vaccination rates. On the contrary, breakthroughs in vaccine technology, such as the development of mRNA vaccines, nanoparticle-based vaccines, and adjuvant formulations, contribute to more effective and rapid vaccine production, which are expected to offer remunerative opportunities for the expansion of the market during the forecast period.

The U.S. vaccines market share is segmented on the basis of technology type, indication, and end user. On the basis of technology type, the market is categorized into recombinant and conjugate vaccines, live attenuated vaccines, inactivated vaccines, toxoid vaccines, and others. Depending on indication, it is classified into pneumococcal disease; influenza; human papilloma virus; meningococcal disease; rotavirus; varicella; measles, mumps, and rubella; diphtheria, pertussis, and tetanus (DTP); polio; hepatitis; and other indications. By end user, it is segregated into pediatric, adults, and travelers.

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Competition Analysis

The major players operating in the U.S. vaccines market include Bavarian Nordic, Merck & Co., Inc., Sanofi, Pfizer, Emergent Biosolutions, CSL, Moderna, Inc., Dynavax Technologies, Novavax, Inc., and GSK Plc. These major players have adopted various key development strategies such as business expansion, new product launches, and partnerships to strengthen their foothold in the competitive market.

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Key Market Segments

By Technology Type

- Inactivated Vaccines

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- Toxoid Vaccines
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- Live Attenuated Vaccines
- Others

By Indication

- Pneumococcal Disease
- Influenza
- Human Papilloma Virus
- Meningococcal Disease
- Rotavirus
- Varicella
- Measles, Mumps, and Rubella
- Diphtheria, Pertussis, and Tetanus (DTP)
- Polio
- Hepatitis
- Other Indications

By End User

- Pediatric
- Adults
- Travelers
- Key Market Players
- Bavarian Nordic
- Merck & Co., Inc.
- Sanofi
- Pfizer
- Emergent Biosolutions
- CSL
- Moderna, Inc.
- Dynavax Technologies
- Novavax, Inc.
- GSK plc.

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