

Pneumococcal Vaccines - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Pneumococcal Vaccines Market size is estimated at USD 9.23 billion in 2025, and is expected to reach USD 11.68 billion by 2030, at a CAGR of 4.83% during the forecast period (2025-2030).

Factors such as the high prevalence of pneumonia, rising government awareness programs for pneumonia vaccination, and the introduction of new pneumococcal vaccines are anticipated to fuel market growth over the forecast period.

The high burden of pneumonia globally is anticipated to drive the demand for vaccines and contribute to market growth. For instance, according to the data published by the UN International Children's Emergency Fund (UNICEF) in November 2023, around 2,000 children were globally affected by pneumonia on a daily basis. Thus, the high burden of pneumonia, particularly among children, is anticipated to drive the demand for pneumonia vaccines and contribute to market growth.

The government initiatives to reduce the burden of pneumonia are anticipated to fuel the demand for pneumococcal vaccines and propel market growth. For instance, in March 2022, the Ministry of Health and Family Welfare launched the SAANS (Social Awareness and Actions to Neutralize Pneumonia Successfully) initiative to combat the burden of childhood pneumonia in rural and urban areas, which is expected to show significant growth over the forecast period.

Numerous market players are actively developing innovative vaccines, with several of them in various stages of clinical trials. For instance, in June 2022, researchers at Karolinska Institute developed a new vaccine candidate against pneumococci, comprised of nano-sized membrane vesicles produced by the bacteria that protect mice. Moreover, in April 2022, the US Food And Drug Administration (FDA) granted therapy designation to Merck's investigational 21-valent pneumococcal conjugate vaccine, V116, for preventing invasive pneumococcal disease (IPD) and pneumococcal pneumonia caused by *Streptococcus pneumoniae* serotypes.

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Promising results from clinical trials regarding such vaccines hold the potential for introducing novel vaccines to the market and thus propel the market's growth.

Hence, owing to increased awareness about pneumonia and increased product launches, the pneumococcal vaccine market is expected to witness significant growth over the forecast period. However, the high cost of producing vaccines and the long process duration are substantial drawbacks to market growth.

Pneumococcal Vaccines Market Trends

The Pneumococcal Conjugate Vaccine Segment is Anticipated to Witness Growth Over the Forecast Period

The pneumococcal conjugate vaccine provides immunity against the bacteria responsible for pneumococcal infections. Three types of pneumococcal conjugate vaccines are available: PCV13, PCV15, and PCV20. PCV13 is appropriate for infants and children, while PCV15 or PCV20 vaccines are intended for adults between 19 and 64 years of age.

The pneumococcal vaccine segment is anticipated to experience substantial growth in the market, which is attributed to the ongoing developments, initiatives, and strategic initiatives by market players. Enhanced investments in developing pneumococcal conjugate vaccines fuel the segment's expansion.

The rising product approvals are likely to help healthcare providers treat pneumonia, thus driving the market's growth. For instance, in January 2023, the US Food and Drug Administration (FDA) accepted for priority review the supplemental biologics license application for Pfizer's 20-valent pneumococcal conjugate vaccine candidate (20vPnC), which targets 20 *Streptococcus pneumoniae* serotypes to prevent invasive pneumococcal disease (IPD) in infants (aged six weeks) and children up to 17 years. The vaccine also aims to protect against otitis media caused by seven of the 20 *Streptococcus pneumoniae* serotypes.

Various vaccine programs are likely to boost the pneumococcal vaccine adoption, positively impacting the market growth. For instance, in May 2022, India's Union health minister inaugurated the nationwide rollout of the Pneumococcal Conjugate Vaccine (PCV) under the Universal Immunisation Programme (UIP) as part of the "Azadi ka Amrit Mahotsav" initiative celebrating 75 years of Indian independence. Therefore, such government initiatives, coupled with the increasing product launches and clinical trials, are anticipated to fuel the segment's growth over the forecast period.

Thus, with increasing strategic activities of the market players, rising research activities, and government initiatives, the pneumococcal conjugate vaccine segment is expected to witness significant growth over the forecast period.

North America is Anticipated to Hold a Significant Market Share Over the Forecast Period

The presence of established healthcare infrastructure and key market players are major growth drivers for the North American pneumococcal vaccine market, contributing to its substantial share. Additionally, increasing investments in vaccine development and the growing prevalence of pneumonia within the region are anticipated to stimulate market expansion further.

The significant burden of pneumonia cases in the region is expected to boost the demand for pneumonia vaccines, thus contributing to market growth. For instance, according to the data published by the American Lung Association in December 2023, approximately 150,000 individuals are hospitalized annually in the United States due to pneumococcal pneumonia. This is anticipated to drive an increase in the demand for pneumococcal vaccines within the specified region, thereby contributing to the expansion of the market during the forecast period.

Government initiatives to support the adoption of pneumococcal vaccines are anticipated to contribute to market growth. For

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instance, the National Advisory Committee on Immunization (NACI) recommended using a 15-valent vaccine such as PCV15 for all population age groups in Canada. Thus, such government support and recommendations for promoting the use of pneumococcal vaccines in the country are likely to boost market growth.

The substantial market share is attributed to the presence of key players and the well-established healthcare infrastructure. For instance, in April 2023, Pfizer received US Food and Drug Administration approval for 20-valent pneumococcal conjugate vaccine Prevnar 20 for infants and children. Similarly, in May 2022, GSK committed USD 3.3 billion to acquire Affinivax, a clinical-stage vaccine developer with a phase III-ready vaccine candidate that addresses more bacterial strains than any pneumococcal vaccine currently available. Thus, an increase in approvals and product launches of pneumococcal vaccines in the region is anticipated to augment the market's growth over the forecast period.

Thus, owing to the increase in pneumonia cases, increasing strategic activities, and government approvals, the market in the region is projected to grow over the forecast period.

Pneumococcal Vaccines Industry Overview

The pneumococcal vaccine market is highly consolidated and consists of a few players. Market players adopt various strategies to expand their business, such as acquisitions, collaborations, and product launches. Companies expand their presence in other geographies by collaborating with distributors and thus increase product availability, boosting market growth. Some companies currently dominating the market are GSK PLC, Pfizer Inc., CSL Ltd, Merck KGaA, Serum Institute of India Pvt. Ltd, and Sanofi.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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