

## **Latin America Vaccine Market Report and Forecast 2025-2034**

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### **Report description:**

The Latin America vaccine market was valued at USD 4472.01 Million in 2024, driven by the continuous development of vaccines by the pharmaceutical companies across the region. The market is anticipated to grow at a CAGR of 5.10% during the forecast period of 2025-2034 to achieve a value of USD 7354.11 Million by 2034.

#### Latin America Vaccine Market Overview

Vaccines are biological preparations that stimulate the immune system to protect against infectious diseases. They contain weakened or inactivated pathogens, or genetic material, prompting an immune response without causing illness. Vaccination helps prevent diseases such as measles, influenza, polio, and COVID-19, reducing mortality and healthcare burdens globally. They can be administered via injection, oral drops, or nasal sprays. Immunisation programmes play a crucial role in public health by controlling outbreaks and achieving herd immunity. Continuous research and advancements in vaccine technology, including mRNA and recombinant vaccines, are enhancing efficacy, safety, and accessibility worldwide.

#### Latin America Vaccine Market Growth Drivers

##### Expanding Public Immunisation Programmes Driving Market Growth

The increasing prevalence of vector-borne diseases and government-led immunisation initiatives are key drivers of vaccine market growth in Latin America. For instance, in February 2024, Takeda Pharmaceutical announced that it would prioritise supplying its dengue vaccine, Qdenga, to Brazil's Ministry of Health. To ensure adequate vaccine availability for individuals completing their two-dose regimen, the company suspended direct contracts with states and municipalities and restricted private sector distribution. This decision, driven by the worsening dengue epidemic, highlights the growing demand for dengue vaccines. As public health programmes expand, increased vaccine procurement will drive market growth, fostering stronger immunisation coverage in the region.

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Rising government investments in national immunisation programmes and the growing burden of infectious diseases are driving the Latin America vaccine market value. For instance, in December 2023, Brazil's Ministry of Health announced the integration of the dengue vaccine into the public Unified Health System (SUS), with vaccinations starting in February 2024. Due to limited supply from Takeda, initial distribution will target priority populations and high-risk regions. As Brazil becomes the first country to provide public access to this vaccine, increased governmental support and funding for immunisation programmes are expected to enhance market development, promoting higher vaccine adoption and strengthening Latin America's healthcare infrastructure.

#### Latin America Vaccine Market Trends

The market is witnessing several trends and developments to improve the current scenario. Some of the notable trends are as follows:

##### Surge in Clinical Trials Activities to Impact the Landscape Positively

Growing participation in global clinical trials and advancements in mRNA vaccine technology are shaping the market. For instance, in March 2021, TecSalud, the health system of Tecnológico de Monterrey, participated in the phase II and III trials of the German CureVac COVID-19 vaccine. This involvement strengthened Mexico's research capabilities and infrastructure for large-scale trials. With mRNA vaccines gaining prominence, increased investment in research and development will enhance Latin America's position in the global vaccine landscape. As regulatory approvals expand, the region is expected to witness higher vaccine production and faster integration of next-generation vaccines, fostering market development.

##### Expanding Private Sector Involvement to Drive the Latin America Vaccine Market Value

The private sector is playing an increasing role in the market, with pharmaceutical companies investing in research, production, and distribution. Partnerships between biotech firms and governments are fostering innovation, while corporate healthcare initiatives are improving vaccine access. The growing presence of multinational firms, such as GSK and Pfizer, strengthens the region's vaccine pipeline. Additionally, private healthcare providers are offering vaccination services, catering to middle- and high-income populations. This expanding private sector involvement is accelerating market growth, improving technological capabilities, and ensuring a more diversified vaccine supply in Latin America.

##### Adoption of Single-Dose HPV Vaccination Strategies to Enhance the Latin America Vaccine Market Demand

The rising focus on cost-effective immunisation strategies and cervical cancer prevention is driving innovations in the global vaccine market. A November 2024 study by the International Agency for Research on Cancer (IARC) highlights the benefits of a single-dose HPV vaccine schedule, projecting substantial cost savings of USD 435 million in India, USD 156 million in Brazil, and USD 12 million in Rwanda over a decade. These savings enable resource reallocation to increase vaccine coverage. As governments adopt single-dose vaccination, the market will experience accelerated growth due to improved affordability, wider immunisation reach, and increased demand for HPV vaccines in emerging economies.

##### Rising Government Immunisation Programmes Boosting Latin America Vaccine Market Growth

The governments in Latin American countries are expanding immunisation programmes to combat infectious diseases, increasing vaccine accessibility. Initiatives like PAHO's Revolving Fund ensure affordable procurement, while national vaccination plans prioritise diseases such as influenza, HPV, and COVID-19. Investments in public health infrastructure and awareness campaigns are enhancing vaccine coverage, particularly in rural areas. The push for universal vaccination is driving market demand, strengthening regional production capabilities, and fostering partnerships with global manufacturers. As healthcare policies evolve, continued government support will sustain market expansion, ensuring widespread immunisation and improving disease

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control efforts across Latin America.

## Latin America Vaccine Market Segmentation

Latin America Vaccine Market Report and Forecast 2025-2034 offers a detailed analysis of the market based on the following segments:

### Market Breakup by Type

- Inactivated
- Live Attenuated
- Recombinant/Subunit/Conjugate
- mRNA
- Toxoid
- Viral Vectors
- Others

### Market Breakup by Age Group

- Pediatrics
- Adults

### Market Breakup by Disease Indication

- Bacterial Diseases?
  - ??- Pneumococcal Disease
  - ??- Diphtheria/Pertussis
  - ??- Meningococcal Disease
  - ??- Others
- Viral Diseases?
  - ??- Herpes Zoster
  - ??- Rotavirus
  - ??- Hepatitis
  - ??- Influenza
  - ??- Human Papilloma Virus
  - ??- Measles/Mumps/Rubella
  - ??- Others

### Market Breakup by Route of Administration

- Oral
- Parenteral

### Market Breakup by End User

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- Hospitals
- Retail Pharmacies
- Government Suppliers
- Others

#### Market Breakup by Country

- Brazil
- Argentina
- Mexico
- Others

#### Latin America Vaccine Market Share

##### Recombinant/Subunit/Conjugate Vaccines to Lead the Segment by Type

Recombinant, subunit and conjugate vaccines are expected to hold the largest market share due to their enhanced safety, strong immunogenicity, and lower risk of adverse reactions. As per the analysis by Expert Market Research, the global conjugate vaccine market is anticipated to grow at a CAGR of 11% during the forecast period of 2025-2034. In Addition, the value of the global recombinant vaccine market is expected to grow at a CAGR of 11.9% during the forecast period of 2025-2034. These vaccines are widely used in Latin America's immunisation programmes against diseases like hepatitis, human papillomavirus (HPV), and pneumococcal infections. Advancements in biotechnology and increasing investments in vaccine development drive their adoption. Additionally, growing awareness and rising government initiatives for immunisation coverage further fuel market expansion. As Latin America continues to modernise its vaccine portfolio, recombinant/subunit/conjugate vaccines will dominate, ensuring broader protection and driving significant growth in the forecast period.

##### Adults to Dominate the Latin America Vaccine Market Segmentation by Age Group

The adult segment is poised to lead the market, driven by increasing demand for vaccines against influenza, HPV, hepatitis, and pneumococcal diseases. As per the analysis by Expert Market Research, the human papillomavirus (HPV) vaccine market is expected to grow at a CAGR of 11.60% during the forecast period 2025-2034. Furthermore, the global influenza vaccine market is anticipated to grow at a CAGR of 7.3% during the forecast period of 2025-2034. Rising awareness of adult immunisation, coupled with government-backed vaccination campaigns, boosts market growth. The ageing population and growing prevalence of chronic diseases make adult vaccinations essential for disease prevention. Additionally, corporate and occupational immunisation programmes are expanding, further increasing demand. While paediatric vaccinations remain crucial, the rising focus on adult immunisation due to changing disease patterns ensures this segment's dominance, making it a key driver for market expansion in the coming years.

##### Viral Diseases to Hold a Significant Latin America Vaccine Market Value for Segmentation by Disease Indication

Viral diseases are expected to hold the largest market share fuelled by the high prevalence of influenza, HPV, hepatitis, and rotavirus infections. As per the analysis by Expert Market Research, the hepatitis B vaccine market is expected to grow at a CAGR of 4.8% during the forecast period of 2025-2034. The region has witnessed increasing government initiatives for mass immunisation campaigns to combat viral outbreaks, particularly in densely populated areas. The development and rapid adoption of innovative vaccines, such as mRNA-based COVID-19 vaccines, have further accelerated market growth. With continuous advancements in viral vaccine technology and growing investments in research, the demand for effective viral disease prevention measures will sustain this segment's leadership, shaping the vaccine market's future trajectory.

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## Parenteral Route to Dominate the Latin America Vaccine Market by Route of Administration

The parenteral route is expected to dominate the market due to its superior efficacy in triggering a strong immune response. Injectable vaccines, including those for influenza, hepatitis, and HPV, are widely administered through this route, ensuring precise dosing and high bioavailability. The growing adoption of combination vaccines and increasing government-led immunisation initiatives contribute to its market share. While oral vaccines remain essential for diseases like rotavirus and polio, the reliability and effectiveness of parenteral administration in delivering long-lasting immunity make it the preferred choice, reinforcing its leadership in the vaccine market.

## Government Suppliers to Lead the Latin America Vaccine Market Share by End User

Government suppliers are set to dominate the market, as national immunisation programmes account for the majority of vaccine distribution. Public health initiatives, subsidised vaccination schemes, and collaborations with global health organisations such as the WHO and PAHO drive market growth. Large-scale procurement by government bodies ensures widespread immunisation coverage, particularly in rural and underserved areas. While retail pharmacies and hospitals play a role in vaccine distribution, government-led initiatives remain the backbone of Latin America's vaccination strategy. This strong public sector involvement ensures continued market expansion, improving accessibility and immunisation rates across the region.

## Latin America Vaccine Market Analysis by Region

Brazil is expected to hold the largest market share in the Latin America vaccine industry, driven by its strong biopharmaceutical infrastructure, extensive immunisation programmes, and robust government support. Institutes like the Butantan Institute and Fiocruz play a pivotal role in local vaccine production, reducing reliance on imports and ensuring affordability. The country's high healthcare spending, large population, and established partnerships with global vaccine manufacturers further strengthen its market position. Meanwhile, Mexico and Argentina are emerging as key players due to increasing investments in biomanufacturing, while smaller nations are focusing on expanding immunisation coverage. As Brazil continues advancing vaccine research and production, it is set to lead regional market growth, with other nations contributing to expanding vaccine accessibility.

## Leading Players in the Latin America Vaccine Market

The key features of the market report comprise patent analysis, grants analysis, funding and investment analysis, and strategic initiatives by the leading players. The major companies in the market are as follows:

### Pfizer Inc.

Founded in 1849 and headquartered in New York, USA, Pfizer Inc. is a leading global pharmaceutical company with a strong presence in the market. The company develops and manufactures innovative vaccines for infectious diseases, including pneumococcal disease, COVID-19, and meningococcal infections. Pfizer played a crucial role in Latin America's COVID-19 immunisation efforts through its mRNA-based Comirnaty vaccine, developed in partnership with BioNTech. With continued investments in research and production, Pfizer remains a key player in advancing vaccine accessibility and innovation across the region, addressing emerging health challenges with cutting-edge immunisation solutions.

### Butantan Institute (Brazil)

Established in 1901 and headquartered in Sao Paulo, Brazil, the Butantan Institute is a leading biomedical research centre and

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vaccine manufacturer in Latin America. It plays a crucial role in Brazil's immunisation programmes, producing vaccines for diseases such as influenza, dengue, and COVID-19. The institute collaborates with international pharmaceutical firms to enhance vaccine production and distribution. Its extensive research in virology and biotechnology has positioned it as a key driver of vaccine innovation and public health initiatives, ensuring widespread immunisation coverage and strengthening Latin America's vaccine security.

#### BioNTech

Founded in 2008 and headquartered in Mainz, Germany, BioNTech is a biotechnology company specialising in mRNA-based vaccines and immunotherapies. It gained global recognition for co-developing the Comirnaty COVID-19 vaccine with Pfizer, significantly impacting Latin America's vaccination efforts. The company focuses on innovative vaccine development for infectious diseases and personalised cancer therapies. BioNTech continues to expand its vaccine portfolio through cutting-edge research and collaborations, aiming to introduce next-generation immunisation solutions in Latin America, addressing public health challenges with advanced biotechnological approaches.

#### Sanofi Pasteur

Sanofi Pasteur, the vaccines division of Sanofi, was founded in 1907 and is headquartered in Lyon, France. It is a major player in the market, supplying vaccines for diseases such as influenza, polio, and yellow fever. The company actively supports immunisation programmes across the region, enhancing disease prevention through its broad vaccine portfolio. Sanofi Pasteur invests in research and development to introduce innovative vaccines, ensuring high-quality immunisation solutions for Latin American populations. Its commitment to global health positions it as a leader in combating infectious diseases through advanced vaccination strategies.

Other key players in the market include GlaxoSmithKline, AstraZeneca, Moderna, Inc., Eurofarma Laboratorios SA, Sinergium Biotech (Argentina), and Beep Saude (Brazil).

#### Key Questions Answered in the Latin America Vaccine Market

- What was the Latin America vaccine market value in 2024?
- What is the Latin America vaccine market forecast outlook for 2025-2034?
- What is market segmentation based on type?
- What is market segmentation based on age group?
- What is market segmentation based on disease indication?
- What is market segmentation based on the route of administration?
- What is market segmentation based on end users?
- What are the major factors aiding the Latin America vaccine market demand?
- How has the market performed so far and how is it anticipated to perform in the coming years?
- What are the market's major drivers, opportunities, and restraints?
- What are the major Latin America vaccine market trends?
- Which type will lead the market segment?
- Which age group will lead the market segment?
- Which disease indication will lead the market segment?
- Which route of administration will lead the market segment?
- Which end user will lead the market segment?
- Who are the key players involved in the Latin America vaccine market?
- What is the patent landscape of the market?

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- What are the current unmet needs and challenges in the market?
- How are partnerships, collaborations, mergers, and acquisitions among the key market players shaping the market dynamics?

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