Dengue Vaccine Market: Contribution of NGOs for Better Vaccine Access Expected to Drive the Market in Lower Income Countries: Global Industry Analysis & Opportunity Assessment, 2017 – 2027
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Dengue Vaccine Market: Contribution of NGOs for Better Vaccine Access Expected to Drive the Market in Lower Income Countries: Global Industry Analysis & Opportunity Assessment, 2017 – 2027

Global dengue vaccine market revenue is expected to expand at a significant rate owing to a large unmet need

The first dengue vaccine, Dengvaxia (CYD-TDV) developed by Sanofi Pasteur is registered in 14 countries in the Latin America and Asia Pacific region. CYD-TDV vaccine is a live recombinant tetravalent dengue vaccine that is indicated as a 3 dose series of 0/6/12 month schedule. There are around five other vaccine candidates under evaluation in clinical trials, comprising other live-attenuated vaccines as well as subunit, DNA and purified inactivated vaccine candidates of which Takeda’s TAK-003 and Butantan Institute vaccine candidates are being evaluated in phase 3 clinical trials currently.

The global dengue vaccine market is estimated to be valued at nearly US$ 250 Mn in 2017 and is expected to expand at a 17.5% CAGR over the forecast period (2017–2027). The global dengue vaccine market is projected to be valued at more than US$ 1250 Mn by 2027.

Factors impacting the global dengue vaccine market

Growth of the global dengue vaccine market is mainly driven by rising burden of dengue fever in tropical regions, large unmet medical need for managing dengue burden, promising end stage vaccine pipeline, development of live attenuated tetravalent dengue vaccine, and expected local production of dengue vaccine in various countries. Other prominent factors driving revenue growth of the market are adoption/uptake of dengue vaccine by various countries in dengue endemic regions of Latin America and Asia Pacific and increased governmental interest to incorporate the vaccine in public immunisation programmes across various countries.

However, supply side infrastructure bottlenecks such as surveillance system, standardised diagnostics practice, and cold chain systems for storage of vaccine in resource constrained countries are the factors hampering the growth of the global dengue vaccine market.

Companies engaged in the development of dengue vaccine are employing strategies to incorporate dengue vaccine in public immunisation programmes and vaccines in clinical stage development are being tested for safety and efficacy in all age groups and different transmission settings.

Global Dengue Vaccine Market Attractiveness Analysis by End User, 2017 – 2027

Several governments are willing to incorporate dengue vaccine in public immunisation programmes given assured quality, safety and affordability of the vaccine in endemic countries.

The Government Institutes segment is expected to dominate the global dengue vaccine market in revenue terms and the trend is projected to continue throughout the forecast period. The Government Institutes segment is estimated to account for 49.5% value share in 2017 and is projected to account for 51.9% share by the end of 2027. In terms of value, the Hospitals segment is anticipated to register a moderate CAGR of 17.3%
during the forecast period. The NGOs segment is expected to remain the least attractive segment in the global dengue vaccine market in revenue terms with an attractiveness index of 0.7 over the forecast period. The NGOs segment is estimated to account for 22.5% value share in 2017 and is projected to account for 20.5% value share by the end of 2027. Analyst Viewpoint

Developing a vaccine that is effective in all age groups is expected to drive market revenue growth over the forecast period

Of late dengue vaccine candidates, which are in the late stage of development, are showing better clinical benefits in all age groups and have better dosing pattern. For instance, Takeda’s - Tak-003 dengue vaccine candidate has demonstrated acceptable safety and efficacy in different population groups with two doses (three months apart) of vaccine. Currently Dengvaxia is recommended in three doses at 0, 6, 12 months. Development of dengue vaccine that is effective for infants and children is expected to reduce the dengue burden and thereby create demand in the global dengue vaccine market.

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