

****Published June 2023****

MarketVIEW: New travel vaccines (CAT: VAMV090)

Product Name	:	MarketVIEW: new travel vaccines
Description	:	Global vaccine commercial opportunity assessment
Contents	:	Executive presentation (~300 slides .pdf) + MS-forecast summary(s) (.xls)
Therapeutic Area	:	Travel vaccines
Publication date	:	June 2023
Catalogue No	:	VAMV090

Background

The **global travel industry** is recovering after a significant slump between 2019 and 2020 due to the **SARS-CoV-2** pandemic. Although UNWTO figures for international tourist arrivals (global, FY2022) were still **-37%** down from 2019, many analysts believe 2023/2024 could see a return/or even growth over 2019 levels.

Because of the potential for exposure to diseases outside a travelers home country, vaccinations are pivotal in travel medicine. Health bodies such as the **US Centers for Disease Control (CDC)** recommend a review of both routine and recommended vaccines according to travel characteristics and personal health status. Furthermore, some vaccines are mandatory due to International Health Regulations (IHR), 2005 and required for entry required by certain countries e.g., yellow fever, meningococcal (Haj), and polio.

Key travel vaccine companies are the major players such as **Sanofi Pasteur**, **GSK**, and **Pfizer**, but also growing mid-tier players such as **Valneva SE** and **Bavarian Nordic**, the latter having made several recent acquisitions in the space. Late-stage or within-registration vaccines such as those for dengue virus, ETEC, Lyme, and chikungunya virus (as well as endemic use) will be offered to travelers in the coming years bringing new complexity and additional costs to pre-travel decision-making.

This **MarketVIEW** segment analysis is a comprehensive commercial evaluation exploring both existing and new travel vaccines to 2040 from 14 points of origin countries¹. A full review of the travel vaccination process, traveler types/behaviors, recommendations (post-pandemic), and company products/portfolios is provided. A new methodology is developed to quantify the value of the existing travel market along with detailed forecasts provided for **9 new vaccine products#** (value/volume) per traveler age/type (Visiting Friends/Family and Business + Other). Country-level, forecast assumptions are strengthened by **consumer-primary research [n=250]** where prospective travelers to endemic regions have been surveyed in several areas including their awareness of endemic diseases and opinions/attitudes to new travel vaccines.

¹ USA, Canada, France, Germany, Italy, Spain, UK, Finland, Norway, Denmark, Sweden, South Korea, Australia & Japan

Methodology

VacZine Analytics has closely monitored all significant source material pertaining to travel vaccines in each respective market. Source materials used are academic literature articles, government websites, medical bodies and associations, conference proceedings, social media etc. Previously published research by **VacZine Analytics** in the field of travel/endemic pathogens has also been utilised including Chikungunya, dengue and JEV pathogens.

Primary research (Phase 1 = 250 online respondents) has been incorporated into this study.

PRODUCT CONTENTS:

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****This product is an [Executive presentation \(.pdf\)](#), [an MS- forecast summary workbook \(.xls\)](#)

Contents – Summary presentation (.pdf)



Contents

Author's notes

Executive summary

[SECTION 1] New travel vaccines: commercial model key outputs

[SECTION 2] The travel industry: recovery and outlook

[SECTION 3] Background to travel vaccination

[SECTION 4] Travel-related diseases and pathogens

[SECTION 5] Existing travel vaccines market

[SECTION 6] New travel vaccines

[SECTION 7] Methodology and market forecast to 2040

[SECTION 8] Travelers survey [n=250], results and analysis

Appendix 1: Travel-related diseases – risk to travelers maps

Appendix 2: Major company sales figures 2003-2022

References/bibliography

About **VacZine Analytics**

Disclaimer

SNAPSHOT

PAGES: >300 slides fully referenced/sourced. Available in .pdf form

Contents – MS-Excel workbook (.xls)



Travel vaccines - forecast **summary** to 2040 workbook is provided

**the complete travel market forecast model (>200 worksheets) is available on additional request*

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BIBLIOGRAPHY

➤ 180 References – available upon request



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VacZine Analytics

A division of Assay Advantage Ltd
Warren (Carlton) House
Bells Hill
Bishops Stortford
Herts
CM23 2NN
United Kingdom
Tel: +44 (0) 1279 927049
E-mail: info@vaczine-analytics.com

About VacZine Analytics:

VacZine Analytics is an established strategic research agency based in the United Kingdom. Its aim is to provide disease and commercial analysis for the vaccine industry and help build the case for developing new vaccines and biologics.

For more information, please visit our website www.vacZine-analytics.com

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