

Dengue vaccine market to witness rapid growth from 2015

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Dengue vaccine market to witness rapid growth from 2015 and 2020



Among the five major pharmaceutical markets (5MM: Brazil, India, Mexico, Singapore and Thailand), Brazil and Mexico are projected to be the leading contributors to the dengue vaccine marketplace, as it expands rapidly from an estimated \$70 million in 2015 to \$400 million by 2020, at a Compound Annual Growth Rate (CAGR) of 42 percent, according to research and consulting firm GlobalData.

The company's latest report states that Brazil and Mexico will achieve a combined market share of over 98 percent across the 5MM in 2015, with respective sales of \$45 million, equaling a 64 percent market share, and \$24million (34 percent).

However, these shares will change dramatically by 2020, as Mexico will surge ahead to generate \$217 million, a 54 percent market share, while Brazil's more modest growth will take it to \$97 million (24 percent).

Growth in Brazil will be stymied by the arrival of a domestically-produced, live-attenuated dengue vaccine, TV-003, which GlobalData expects to seize substantial market share from big pharma-manufactured vaccines due to its lower price per dose.

Dr Christopher J Pace, GlobalData's Analyst covering infectious diseases, says, "The rapid uptake of dengue vaccines will be driven primarily by the inclusion of live-attenuated vaccines in national immunization programs.

"Past failures of vector control initiatives to curtail the spread of the *Aedes aegypti* mosquito have left a glaring void in the dengue prevention and control landscape, which will hasten the uptake of vaccines. We expect manufacturers to target the pediatric population for vaccination, as this will likely improve coverage rates and provide a more sustained revenue source for these vaccine manufacturers."

GlobalData anticipates that the superior clinical and commercial positioning of live-attenuated dengue vaccines, led by

Sanofi's CYD-TDV and Takeda's DENVax, will facilitate their market dominance, with sales of these products across the 5MM projected to reach \$166 million, a 42 percent market share, and \$148 million (37 percent), respectively, by 2020.

Dr Pace continues: "Although CYD-TDV is anticipated to be the first dengue vaccine to reach the market, GlobalData expects second-to-market DENVax to seize a significant share of the marketplace due to its more convenient dosing schedule."