

‘Asia is the fastest growing vaccine market in the world’

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Asian governments are striving to ensure that every stratum of the society, irrespective of social and economic status is granted access to immunization. In May 2012, the WHO launched the ‘Global Vaccine Action Plan (GVAP)’ that was authorized by 194 member states of the World Health Assembly. This rising demand for better healthcare infrastructure and high awareness levels of the benefits of immunization are the major factors boosting the vaccine market growth. Speaking to BioSpectrum Asia Magazine, Ms Angela Chen Si Ting, Associate Therapeutics Strategy Lead, Vaccines and Infectious Diseases, Therapeutic Science and Strategy, APAC, QuintilesIMS, highlights the key trends in Asia’s growing vaccine market.



What according to You are upcoming trends in Asia's vaccine business?

We have noticed an increased interest in the Asia vaccine business from two kinds of manufacturers/developers –Western manufacturers and the Asia-Based manufacturers. One of the biggest reason was observed to be that a large proportion of

WHO Prequalified vaccines are purchased by the GAVI, UNICEF, and PAHOs which are essentially supplied by the developing world. Our observations also revealed increased interests in three main sub-regions within Asia for vaccine development – mainly China, South East Asia and India. Most of our customers playing in this segment of the market shared that Asia is a critical part of companies' expansion growth and downstream volume of sales.

Over the past few years, we have witnessed multiple births to Asia-based manufacturers which implemented faster and cheaper manufacturing process such as the use of tobacco plant, DNA plasmids, and delivery systems; T-cell targeting, etc. Many companies target profiles rival any from the West. This is supported by our observation of the market where companies from Japan, South Korea, and India venturing into US and EMEA registration shortly after local registration. Each of which comes with a high interest in improving public health within neglected countries.

Based on our interactions with KOLs and customers within the region, we understand that there are many companies in their early phase of maturation and it will not be long before their products take on market shares starting from South East Asia region and Africa region. It will be an exciting scene when these young and enthusiastic companies venture into western markets in mass and to avail themselves of pricing and innovation advantages.

Please elaborate on some of the key drivers of Asia's vaccine businesses.

We believe that one of the key drivers within Asia businesses is the People. Asia is the home to 60% of the world's population which offers a huge diversified patient pool for most clinical trials. The region also has one of the highest incidence of tropical disease but also one of the most popular vacation spot in the world.

The growing economies of Asia and the rise in quality of life are enabling expanded access to healthcare, including vaccines. Both Government and Private Healthcare authorities had come together since the 80s to help promote better healthcare, public health support and also expanding insurance and reimbursement schemes. While every country has different economic growth rate but together as one region – Asia, understands the need to work together in order to prevent pandemic which has a devastating effect on the economy. Especially now when traveling has become too convenient and the movement of travelers can also be seen as the rate of spread if a pandemic hits.

Having multiple collaborations with customers, investigators, local authorities and Non-Governmental Organizations (NGOs) in many vaccine clinical trials within the South-East-Asia and India region, QuintilesIMS had the opportunity for more in-depth experience with the people and community. These observations were positive and inspiring. Not only have we observed enthusiastic investigators (e.g. investigators in Singapore, Malaysia, Vietnam, and the Philippines) who dedicated their career to improving public health but have also key interest in improving the lives of the younger minds (e.g. Health authorities in India, Thailand and Indonesia). The method of patient outreach goes beyond referral clinics but rather into schools, less privileged rural villages and etc. It is such advocates and dedication that makes a huge difference when conducting vaccine clinical trial within the region.

How is the market for vaccines across Asia?

The recent growth reports (such as that from Market Data Forecast Report and Global Research Market press release) shared that the vaccine market has a global growth of approximately 13% in which Asia region had been consistently reported as the fastest growing region in this segment at 20-30% year on year. Such projections are consistent with our observations at QuintilesIMS Asia where we received requests for proposals and product/pathway consultation meeting requests for specific support in their clinical development within the region.

Many of such companies came forward to us with key intention to harvest a solution for quick clinical development timeline. We also noticed the increased collaboration between such companies with NGOs such as Bill and Melinda Gates Foundation and PATH where large grants are given to promising developers around the world. The purpose was to encourage the development of vaccines under high quality and compliant solutions that meet WHO's criteria. Recognizing the importance of this, QuintilesIMS has recently recalibrated our solutions for vaccines manufacturers/developers through our Asia Infectious Disease and Vaccines Offering where we aim to help our customers focus on their return on investment in clinical development as part of our overall AsiaPac strategy. In synergy with our expanded network of investigators and health authorities within the region, vaccine manufacturers/developers will benefit from a more streamlined and targeted Asia solution.

Where do you see the vaccine industry heading; five years from now?

We have seen steady growth over the past 3 years. We anticipate that this growth will continue for the reasons discussed above, especially in China and India. Also, advances in science and medicine are creating exciting opportunities in the

vaccine field which we envision more players to emerge in the next few years.

In your opinion what are the most difficult challenges in vaccine business in Asia?

As noted above, the potential of vaccine business in Asia is promising and we have already seen an increase in a number of clinical studies conducted in Asia with an aim for Asia registration. Nevertheless, the constant struggle most studies faced is the access to the patient pool, cold chain management of investigational products and management of patient samples. Some facilities and sites are located in the suburban area where transport and consistent electric supply can be an issue. Working in synchrony with health care workers, clinical trial educators and local partner vendors are usually required in order for studies to succeed.

Which Asian region according to You will lead the growth in vaccine business and why?

Although all governments within the Asia region is dedicated to improving public health within their country and the region, unfortunately, there is still a limit to what each country could achieve based on their capability. For the clinical development of vaccines, we believe that South East Asia and India region will be the next popular spot for vaccines. This is fueled by the increased interest to treatment/vaccination naïve pediatrics population and the positive perception/understanding towards vaccination which is abundant in Asia. For this reason, our observation in South East Asia and India also includes high standards of the ethics committee and regulatory authority review of protocol and product safety/effectiveness.