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# **Dubai Influenza Vaccine Market Analysis**

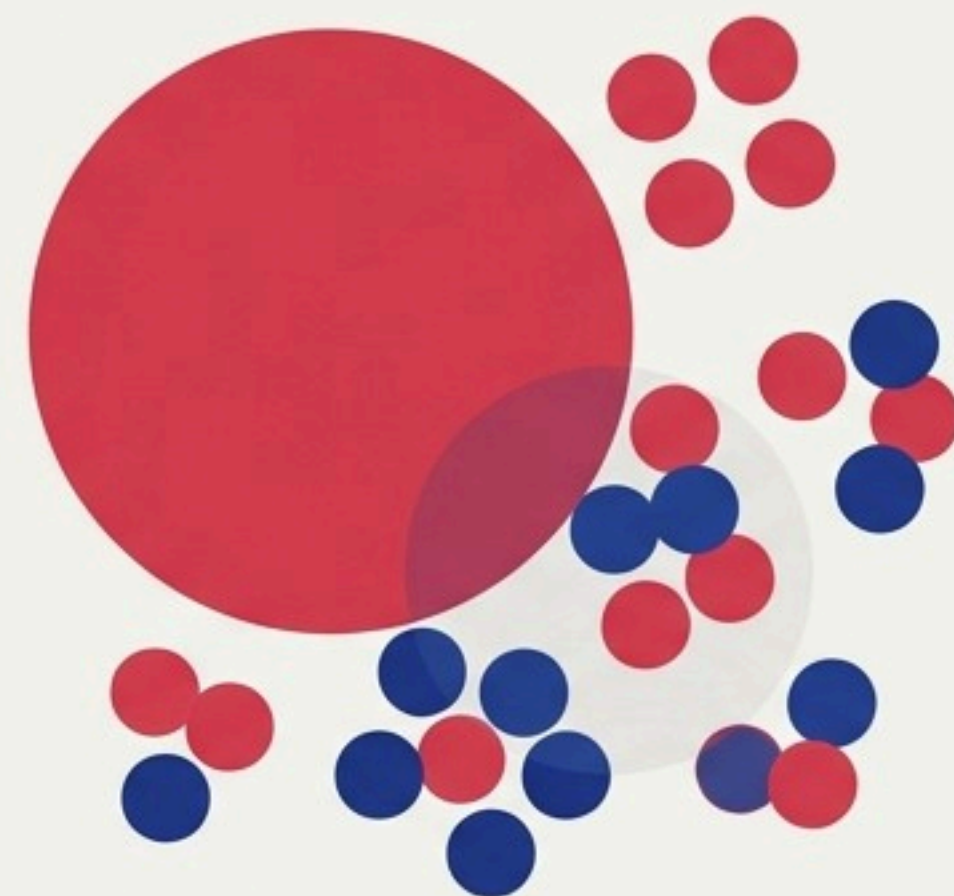
An assessment of the competitive landscape and patient archetypes across six key hospitals.

January 2025



# Vaxigrip's 70% market share masks a fractured landscape of distinct specialist strongholds and competitive battlegrounds

- 1 The surveyed market of 6,218 vaccinated patients is dominated by Vaxigrip (~4,362 units; 70% share). However, this aggregate view is misleading and overlooks critical account-level dynamics.
- 2 The market is sharply divided into two archetypes:
  - \* **Specialist Strongholds** (Al Jalila, Dubai, Rashid Hospitals) are characterized by exclusive Vaxigrip formularies, a singular focus on either pediatric or adult patients, and near-total insurance coverage.
  - \* **Mixed-Demographic Battlegrounds** (Kings College, Mediclinic Group) serve both patient segments, feature competitive multi-vaccine formularies, and have a significant out-of-pocket payer base.
- 3 Influvac demonstrates formidable, often dominant, share in the "Battleground" accounts, capturing 67% share in Mediclinic City and 92% in Mediclinic Parkview, proving a clear path to market leadership in this segment.
- 4 Strategic opportunities are defined by patient sub-segments (e.g., pediatric asthmatics) and payer dynamics, requiring tailored approaches for each account archetype.





# The analysis is based on 2024 vaccination data from over 6,200 patients across six major Dubai hospitals

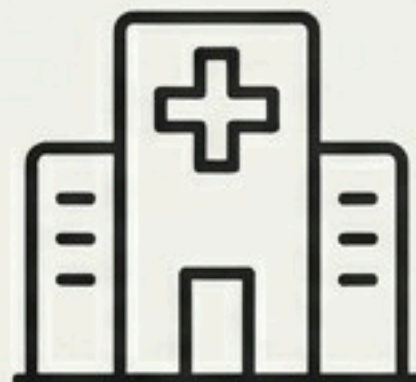


## Study Scope

**Time Period:** January 2024 – December 2024

**Geography:** Dubai, UAE

**Total Patients Analyzed:** 6,218



## Participating Accounts

1. Al Jalila Hospital
2. Dubai Hospital
3. Rashid Hospital
4. Kings College Hospital - Dubai
5. Mediclinic City Hospital
6. Mediclinic Parkview Hospital



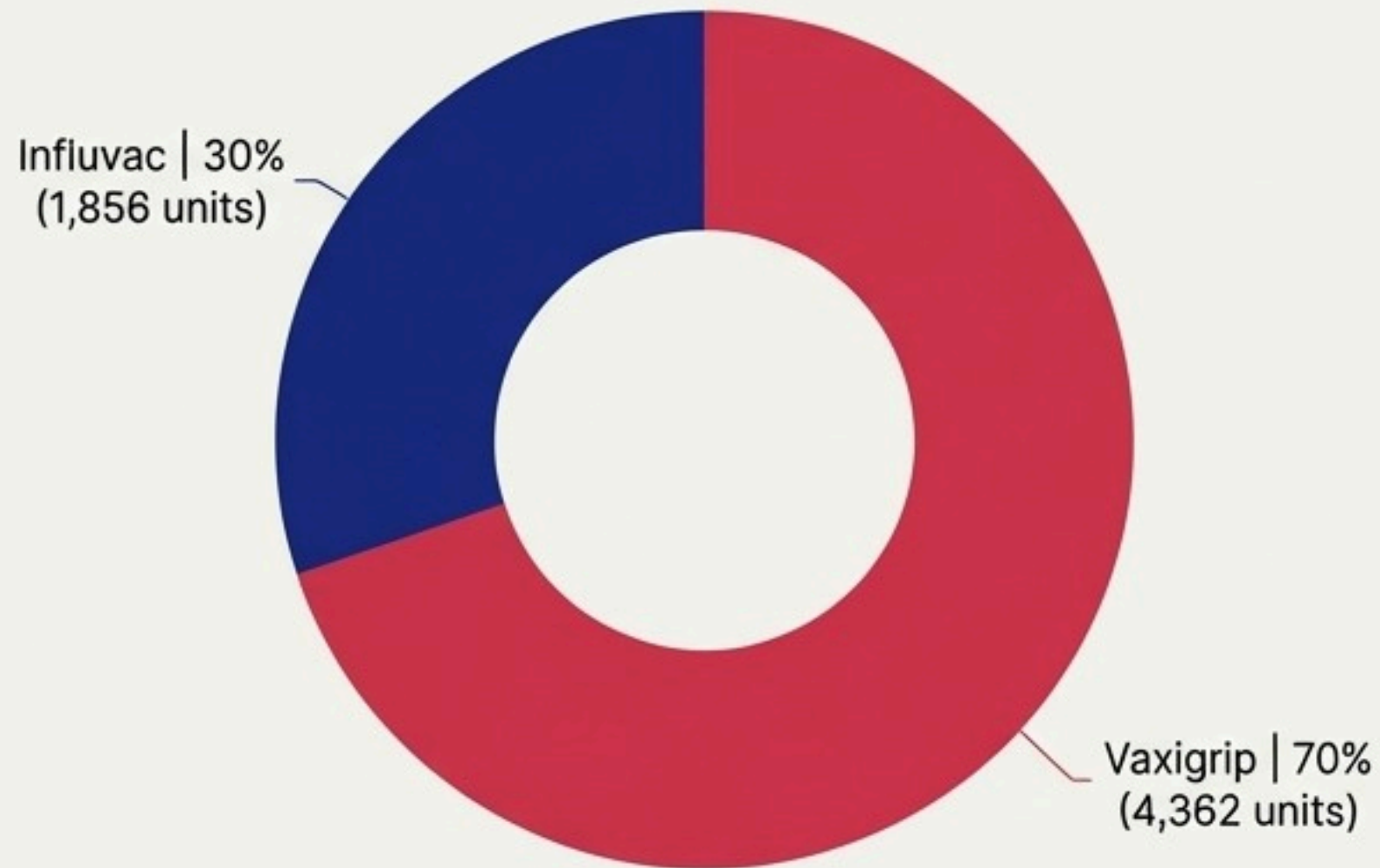
## Key Metrics Captured

- Total vaccination volume
- Vaccine brand availability and unit share
- Pediatric vs. Adult patient split
- High-risk patient populations (e.g., Asthmatics, Pregnant, Immuno-compromised)
- Payer mix (Insurance vs. Out-of-Pocket)



# Vaxigrip commands a 70% share across the surveyed landscape

Total Vaccine Share (N=6,218)



## Key Observations

- **Overall Volume:** A total of 6,218 patients were vaccinated across the six surveyed hospitals in 2024.
- **Clear Leader:** Sanofi's Vaxigrip is the market leader by volume, accounting for more than two-thirds of all vaccinations.
- **Challenger Position:** Abbott's Influvac holds a significant minority share, indicating a solid foothold in the market.

**Insight:** While the top-line figures suggest a stable, Vaxigrip-led market, the **distribution of this share is highly concentrated and varies dramatically** at the account level.



# The competitive landscape is defined by two distinct account archetypes

## Specialist Strongholds

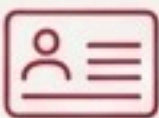
Al Jalila, Dubai Hospital, Rashid Hospital



**Patient Focus:** Singular (100% Pediatric or 100% Adult)



**Formulary:** Exclusive (100% Vaxigrip)



**Payer Mix:** Insurance Dominant (82-100% Coverage)

**Conclusion:** Vaxigrip's volume is secured in these non-competitive, segment-focused accounts.

## Mixed-Demographic Battlegrounds

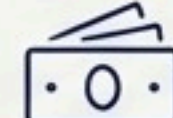
Kings College, Mediclinic City, Mediclinic Parkview



**Patient Focus:** Mixed (Serving both Pediatric & Adult)



**Formulary:** Competitive (Vaxigrip & Inluvac listed)



**Payer Mix:** Significant Out-of-Pocket (32-44%)

**Conclusion:** True market competition occurs here, revealing different brand preferences and dynamics.



# Vaxigrip's dominance is anchored in specialist accounts with exclusive formulary status and high insurance coverage

## Al Jalila Hospital (Pediatric Focus)

Total Patients: 1,018

Patient Mix:  
100% Pediatric



Vaccine Share:  
**100% Vaxigrip** (1,018 units)

Payer Mix (Peds):  
82% Insurance

## Dubai Hospital (Adult Focus)

Total Patients: 1,038

Patient Mix:  
100% Adult



Vaccine Share:  
**100% Vaxigrip** (1,038 units)

Payer Mix (Adults):  
100% Insurance

## Rashid Hospital (Adult Focus)

Total Patients: 1,296

Patient Mix:  
100% Adult



Vaccine Share:  
**100% Vaxigrip** (1,296 units)

Payer Mix (Adults):  
100% Insurance

**Summary Insight:** In these accounts, brand choice is predetermined by formulary, not physician or patient preference. They represent a stable but non-competitive segment.



# In contrast, Influvac demonstrates significant strength in competitive, mixed-demographic accounts

## Mediclinic Parkview (N=1,349)

Patient Mix: 23% Peds / 77% Adults

**Influvac: 92%**  
(1,241 units)

**Vaxigrip: 8%**  
(108 units)

## Mediclinic City (N=714)

Patient Mix: 17% Peds / 83% Adults

**Influvac: 67%**  
(475 units)

**Vaxigrip: 33%**  
(239 units)

## Kings College Hospital (N=803)

Patient Mix: 67% Peds / 33% Adults

**Vaxigrip: 83%**  
(663 units)

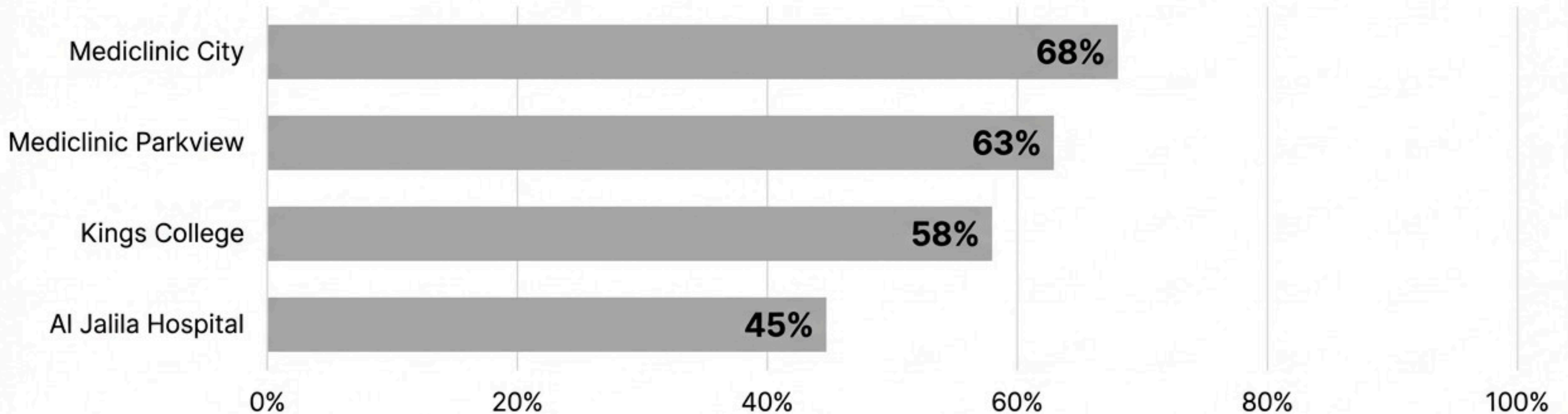
**Influvac: 17%**  
(140 units)

**Summary Insight:** Influvac has established clear dominance within the Mediclinic group. Kings College remains a Vaxigrip-leaning competitive account, representing a potential opportunity to replicate the Mediclinic success.



# The pediatric segment (2-17 years) represents a high-value opportunity, characterized by a large asthmatic population

Proportion of Asthmatics among Vaccinated Pediatrics (2-17 yrs)



**Strategic Implication:** This high prevalence suggests an opportunity for targeted clinical messaging focused on the increased risks of influenza for asthmatic children, potentially influencing physician and parental choice in 'Battleground' accounts.



# High-risk groups form the core of the adult segment, with insurance coverage varying significantly by account type

## Patient Profile in 'Specialist Strongholds' (Dubai & Rashid Hospitals)

### **Dominant Risk Factors (18-49 yrs):**

- Immuno-compromised (30-35%)
- Asthmatic Patients (25-30%)

### **Notably Absent:**

- Pregnant Females (0%)

### **Payer Profile:**

- 100% Insurance Coverage

## Patient Profile in "Mixed Battlegrounds" (Kings & Mediclinic Group)

### **Dominant Risk Factors (18-49 yrs):**

- Highly varied, with a significant Pregnant Female population **(17-38%)** in addition to Immuno-compromised and Asthmatic patients.

### **Payer Profile:**

- High Out-of-Pocket **(34-44%)**

**Summary Insight:** The adult patient journey in 'Battleground' accounts is fundamentally different, involving more diverse patient needs (including obstetrics) and a greater sensitivity to cost due to the payer mix.



# Mapping the Market: Strategic priorities are dictated by an account's demographic focus and competitive intensity



**Key Takeaway:** Growth for Influvac is concentrated in the top-right quadrant. The strategy is to defend and expand share in the Mediclinic group while targeting the Vaxigrip-leaning Kings College account.



# Key takeaways and strategic questions for the 2025 brand plan

## Key Takeaways

1. **Look Beyond Share:** Aggregate market share is a vanity metric; the real performance indicator is share within the addressable, competitive 'Battleground' accounts.
2. **Right to Win is Proven:** Influvac has demonstrated a clear ability to win majority share in competitive private accounts, validating its product profile and strategy in this segment.
3. **Payer & Patient Profile are Key Levers:** Success in 'Battlegrounds' is linked to a value proposition that resonates with a mixed-payer system and diverse high-risk patient groups (e.g., pregnant women, pediatric asthmatics).

## Strategic Questions for Discussion

- ? **Defend & Dominate:** How do we reinforce our leadership position within the Mediclinic group and protect it from competitive pressures?
- ? **Targeted Attack:** What specific clinical and economic messaging is required to convert the Kings College account from a Vaxigrip-leaning to an Influvac-leaning institution?
- ? **Value Proposition:** How can we refine our value proposition for the significant (32-44%) out-of-pocket segment to drive patient- and pharmacist-led demand?
- ? **Segment Focus:** What targeted campaigns can be developed for high-prevalence segments like pediatric asthmatics to create pull-through?