

****Updated June 2012****

MarketVIEW: *Chlamydia trachomatis* vaccines (CAT: VAMV003)

Product Name	:	MarketVIEW: <i>Chlamydia trachomatis</i> vaccines
Description	:	Comprehensive vaccine opportunity assessment
Contents	:	Executive presentation + MS Excel model
Therapeutic Area	:	Adolescent vaccines
Publication date	:	June 2012
Catalogue No	:	VAMV003

Background

After the global success of new HPV vaccines focused on sexually transmitted infections (STDs), vaccine manufacturers are considering other high-burden infections in the adolescent group, especially *Chlamydia trachomatis* (CT). CT is a major cause of serious reproductive complications in the female with outcomes such as pelvic inflammatory disease (PID) and ectopic pregnancies. Although diagnosed infections with *Chlamydia trachomatis* are curable with antibiotic therapy, the vast majority infections are “silent” and unrecognized. Even after treatment re-infection rates of CT remain high with little chance of eradication within the population.

This **MarketVIEW** product is a comprehensive MS Excel-based model + summary presentation which forecasts the potential commercial value of a prophylactic *Chlamydia* vaccine across the major Western and emerging markets (BRIC-M). The model contains value (\$ m) and volume (mio doses) predictions along with launch timeframe, pricing and penetration estimates.

LO/BASE/HI forecast scenarios are included relative to Gardasil adoption as a case study. The impact of country dependent National Immunization Programs and funded “catch-up” campaigns is also studied.

Methodology

VacZine Analytics has closely monitored all significant source material pertaining to *Chlamydia trachomatis* epidemiology/vaccines and consulted with global experts regarding their predictions of vaccine deployment. Secondary source materials used are literature articles, government websites, medical bodies and associations, conference proceedings etc. Previously published research by **VacZine Analytics** in the adolescent field has also been utilised.

PRODUCT CONTENTS:

Published June 2012 (CAT No: VAMV003)

****This product is composed of a model and summary presentation

Contents – Summary presentation (MS PowerPoint based)

Executive Summary
Commercial model – key outputs
Total available demand: Chlamydia vaccine, global, (000s doses)
Total available demand: Chlamydia vaccine, high-income markets, (000s doses)
Total available demand: Chlamydia vaccine, emerging markets, (000s doses)
Total available market: Chlamydia vaccine, global, (\$ 000s)
Total available market: Chlamydia vaccine, by market, (\$ 000s)
Total available market: Chlamydia vaccine, price sensitivity analysis, (\$ 000s)
Chlamydia vaccine: country volume analysis, 2025 (000s doses)
Chlamydia vaccine: country value analysis, 2025 (\$ 000s)
The role of a CT vaccine
Commercial model – key assumptions
Pricing
Model forecast comparisons: June 2011 v current
Chlamydia vaccine opportunity: target product profile
Overall commercial model assumptions per country
Chlamydia trachomatis: brief background
Clinical features
Chlamydia trachomatis: natural history of infection
Chlamydia trachomatis: global incidence
Chlamydia trachomatis: global prevalence
US epidemiology
UK epidemiology
Reasons for increasing incidence
Potential impact of a CT vaccine
Competitor landscape: overview
Competitive environment: major players
Chlamydia trachomatis vaccine – HPV, a relevant case study?
HPV vaccines: analysis of country uptake
Bibliography
Disclaimer
About **VacZine Analytics**

PAGES: ~57 MS PowerPoint slides, fully referenced/sourced. Available in .pdf form



Contents – Vaccine demand model (MS Excel-based)

Title Sheet
Scenario definition
Value Scenario Analysis
Value Summary (Western)
Volume Summary (Western)
Value Summary (Emerging)
Volume Summary (Emerging)
Charts – volume (Western)
Charts – value (Western)
Charts – value/volume (Western)
Females (Western) →
US (13 yrs/ 14 - 18 yrs)
Canada
UK
France
Germany
Italy
Spain
Other EU
Australia
Japan
Females (Emerging) →
Brazil
Russia
India
China
Mexico
Population database
Competition – IP landscape
Assumptions – major markets
Back page
About **VacZine Analytics**
Disclaimer

WORKSHEETS: ~65

PRODUCT COST:

VacZine Analytics will grant a [enter region] license to [enter client name], for the price of:

- o USD \$8995.00/ GBP £5800.00[#] (Region license)*

*A region is North America, Europe or ROW

For orders in the UK, VAT at 20 % will be added to final invoice total

[#]Indicative – prevailing rate to be applied on date of transaction

HOW TO ORDER:

To order please contact your region account manager or order direct at orders@vaczine-analytics.com

This report can also be purchased on-line. Please review the **TERMS and CONDITIONS** of purchase.



VacZine Analytics (R) is a trading division of Assay Advantage Ltd, UK Company Number: 5807728

VacZine Analytics (R) and the “spiral logo” are UK Registered Trademarks, 2009

Bibliography

1. Dempsey AF et al. Cost-effectiveness of routine vaccination of adolescent females against cytomegalovirus. Vaccine. 2012 Apr 21. [Epub ahead of print]
2. Cervical cancer vaccines see growth despite controversy. Available at: <http://www.thehindubusinessline.com/companies/article1579518.ece>. Accessed: June 2012.
3. Macleod J. Coverage and uptake of systematic postal screening for genital Chlamydia trachomatis and prevalence of infection in the United Kingdom general population: cross sectional study. BMJ. 2005 Apr 23;330(7497):940.
4. Lee V Relationship of cervical ectopy to chlamydia infection in young women. J Fam Plann Reprod Health Care. 2006 Apr;32(2) 104-106.
5. Nogales MC. [Diagnosis of Chlamydia trachomatis infection in a clinic for sexually transmitted disease: evaluation of cervical, urethral and rectal swab samples by polymerase chain reaction] Enferm Infecc Microbiol Clin. 2007 Jan;25(1):11-5
6. Simms I. Has the incidence of pelvic inflammatory disease following chlamydial infection been overestimated? Int J STD AIDS, April 1, 2008; 19(4): 285 – 286
7. Niccolai LM Burden of recurrent Chlamydia trachomatis infections in young women: further uncovering the "hidden epidemic". Arch Pediatr Adolesc Med. 2007 Mar;161(3):246-51. Ann Intern Med. 2006 Oct 17;145(8):564-72.
8. Brunham RC. The unexpected impact of a Chlamydia trachomatis infection control program on susceptibility to reinfection. J Infect Dis. 2005 Nov 15;192(10):1836-44.
9. WHO. Global prevalence and incidence of selected curable sexually transmitted infections: overview and estimates. Geneva: World Health Organization, 2001
10. Vaccines and Related Biological Products Advisory Committee May 18, 2006. GARDASIL Quadrivalent HPV (Types 6, 11, 16, 18) L1 VLP Vaccine, Merck Research Laboratories.
11. Centers for Disease Control and Prevention. Chlamydia - Reported Cases and Rates per 100,000 Population by Age Group and Sex, United States, 2006-2010. Available at: <http://www.cdc.gov/std/stats10/tables/10.htm>. Accessed: June 2012.
12. CDC Grand Rounds: Chlamydia prevention: challenges and strategies for reducing disease burden and sequelae. MMWR Morb Mortal Wkly Rep. 2011 Apr 1;60(12):370-3.
13. Centers for Disease Control and Prevention. 2010 Sexually Transmitted Diseases Surveillance. Available at: <http://www.cdc.gov/std/stats10/figures/g.htm>. Accessed: June 2012.
14. UK Health Protection Agency. STIs Annual Slide Set 2000 – 2010. Available at: <http://www.hpa.org.uk/Topics/InfectiousDiseases/InfectionsAZ/STIs/STIsAnnualDataTables/AnnualSTISlideset/>. Accessed June 2012
15. Gray RT et al. Modeling the impact of potential vaccines on epidemics of sexually transmitted Chlamydia trachomatis infection. J Infect Dis. 2009 Jun 1;199(11):1680-8.
16. de la Maza MA et al. A new computer model for estimating the impact of vaccination protocols and its application to the study of Chlamydia trachomatis genital infections. Vaccine. 1995 Jan;13(1):119-27.
17. Time to rethink the expectations for a chlamydial vaccine. Available at: <http://www.nature.com/mi/journal/v2/n4/full/mi200911a.html>. Accessed: June 2012.
18. Finco O et al. Approach to discover T- and B-cell antigens of intracellular pathogens applied to the design of Chlamydia trachomatis vaccines. Proc Natl Acad Sci U S A. 2011 Jun 14;108(24):9969-74.
19. 9th Annual Vaccines Discovery and Development: All Things Considered Conference (Nov. 7-8, 2011, in Boston, MA). Available at: <http://www.sbwire.com/>. Accessed June 2012.
20. Genocea unlocks T cell response to create new class of vaccines. Available at: <http://ebdgroup.com/partneringnews/2012/05/genocea-unlocks-t-cell-response-to-create-new-class-of-vaccines>. Accessed: June 2012
21. Annual HPV vaccine coverage in England in 2010/11. Available at: <http://immunisation.dh.gov.uk>. Accessed: May 2012
- 22.

CONTINUED.....

23. Quadrivalent Human Papilloma Virus Vaccine. MMWR Recommendations and Reports. March 23 2007 /56 (RR02);1 -24
24. 2010 NIS-Teen Vaccination Coverage Table Data. Available at: http://www.cdc.gov/vaccines/stats-surv/nisteen/data/tables_2010.htm. Accessed: June 2012.
25. Fagot JP et al. HPV vaccination in France: uptake, costs and issues for the National Health Insurance. Vaccine. 2011;29:3610–3616.
26. Limia A and Pachón I. Coverage of human papillomavirus vaccination during the first year of its introduction in Spain. Euro Surveill. 2011; 16(21):pii=19873. Available online: www.eurosurveillance.org/ViewArticle.aspx?ArticleId=19873
27. Chadenier GM et al. Assessment of the first HPV vaccination campaign in two northern Italian health districts. Vaccine. 2011 Jun 10;29(26):4405-8.
28. Progress Toward Implementation of Human Papillomavirus Vaccination --- the Americas, 2006—2010. MMWR. October 14, 2011 / 60(40);1382-1384.
29. Australian Government Department of Health and Ageing. Available at: <http://www.health.gov.au/internet/immunise/publishing.nsf/Content/immunise-hpv>. Accessed: June 2012.
30. British Columbia CDC. Available at: <http://www.bccdc.ca/imm-vac/BCImmunizationCov/schoolagecoverage/default.htm>. Accessed: June 2012.

TERMS and CONDITIONS:

VacZine Analytics – a trading division of Assay Advantage Ltd UK Company Number: 5807728 (Herein referred to as “The Company”). (Herein [enter client name] to as “The Client”).

1. This finished research product is provided as a Service. Any additional Service required by the client will be subject to a new proposal being prepared.
2. The Service will commence after written (e-mail) or Fax confirmation stating the Client's acceptance of the Service according the description proposed by the Company.
3. **Cancellation policy.** The Company's cancellation policies are in accordance with the EU Consumer Protection (Distance Selling) Regulations 2000 (DSRs). Prior to acceptance of an order the Company will make available written information regarding Clients cancellation rights. This is posted on the Company website and is available for public review.
4. **Cancellation rights:** For finished documents - a Clients cancellation rights will last for **seven working days** counting from the day that the order was concluded. If the Services i.e. provision of the documents has taken place with the Clients agreement before this period the Client's cancellation rights have ended.
5. Invoicing will **100%** after submission of deliverables to the Client in a form reasonably acceptable to the Client.
6. If not purchased on line invoices are payable within **thirty days** of the invoice date.
7. All proposals are quoted in **\$USD dollars or £GBP** and invoices are to be settled in the same currency.
8. The Company agrees not to disclose to any third party confidential information acquired in the course of providing the services listed without the prior written consent of the Client. Exception occurs when the information is already in the public domain or when disclosure is necessary to help the Company's employees and agents with the performance of the Company's obligations to achieve satisfactory completion of the project and approved in writing by the Client.
9. **Force Majeure:** The Company will not be liable for any delay or failure to perform any obligation under this Agreement insofar as the performance of such obligation is prevented by an event beyond our reasonable control, included by not limited to, earthquake, fire, flood or any other natural disaster, labour dispute, riot, revolution, terrorism, acts of restraint of government or regulatory authorities, failure of computer equipment and failure or delay of sources from which data is obtained.
10. Please also refer to Master **TERMS and CONDITIONS** available upon request.

VacZine Analytics

Warren House
Bells Hill
Bishops Stortford
Herts
CM23 2NN
United Kingdom
Tel: +44 (0) 1279 654514 / +44 (0) 7952470582 / Fax: +44 (0) 1279 655926
E-mail: info@vacZine-analytics.com



VacZine Analytics®
Bringing life to vaccine strategy...

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

VacZine Analytics (R) is a trading division of Assay Advantage Ltd, UK Company Number: 5807728

VacZine Analytics (R) and "the spiral logo" are UK Registered Trademarks, 2009

Bringing life to vaccine strategy...

www.vacZine-analytics.com

Warren House, Bells Hill, Bishops Stortford, Herts CM23 2NN, United Kingdom **Tel.** +44 (0) 1279 654514 **e-mail:** info@vacZine-analytics.com