

****New release September 2009****

MarketVIEW: H1N1 pandemic vaccine - GLOBAL (CAT: VAMV007)

Proposal No/#PO : [Enter client specific #PO]
Product Name : Pandemic specific vaccine H1N1 – vaccine value/volume forecast model (quarterly), Global version
Project Initiation Date : n/a
Billable days : n/a
Initiator(s) : [Enter client name, function and address]
Therapeutic Area : *Pandemic influenza, H1N1*
Product (if applicable) : **CAT No:** VAMV007, updated September 2009

Background

H1N1 or “Swine flu” is a pandemic strain of the influenza A virus which emerged in April 2009. Due to its rapid global spread, the virus prompted the World Health Organisation (WHO) to lift its pandemic alert status to level 6 and manufacturers to begin pandemic specific vaccine production. So far, the virus has similar transmissibility to that of seasonal influenza viruses, although observed clinical disease severity has been for the most part mild in most infected persons who were initially healthy. Despite this, H1N1 still has caused around 3250 deaths (WHO update 65, 11th September 2009), mainly in people with underlying co-morbidities. H1N1 is predicted to cause marked excess mortality as the winter months arrive in the Northern hemisphere.

In late August 2009, the US Advisory Committee on Immunization practices (ACIP) published recommendations regarding who should receive the H1N1 vaccine once it becomes available¹. The following “initial target groups” were listed:

- pregnant women,
- persons who live with or provide care for infants aged <6 months (e.g., parents, siblings, and daycare providers),
- health-care and emergency medical services personnel,[§]
- persons aged 6 months--24 years, and
- persons aged 25--64 years who have medical conditions that put them at higher risk for influenza-related complications.

If vaccine is initially limited, further “priority subsets” of the above were also listed. In the EU, the EU Health Security Committee (HSC)/ Early Warning and Response System (EWRS) also made a statement on H1N1 target and priority groups for vaccination².

1. Use of Influenza A (H1N1) 2009 Monovalent Vaccine. Recommendations of the Advisory Committee on Immunization Practices (ACIP), 2009. MMWR. August 28, 2009 / 58(RR10); 1-8

Purpose of Study

Using currently available information regarding the expected profile, predicted deployment of H1N1 specific vaccine and current prediction of pandemic severity, **VacZine Analytics** has modelled potential H1N1 global vaccine demand (mio doses) per Western and Emerging regions. The provided model and presentation also give estimations of demand per quarter according to each designated vaccination group.

Using adjustable inputs of vaccine penetration, number of doses and pricing the model also estimates potential cumulative revenue (for vaccine manufacturers) and approximate market share based on contracts awarded so far.

PRODUCT CONTENTS:

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This product is composed of a model and summary presentation

Contents – Summary presentation (MS Powerpoint-based)

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- Broad assumptions for H1N1 vaccine: theoretical demand (US)
- Major model assumptions (global)
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- Vaccine demand model assumptions – Western Markets
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- Theoretical predicated H1N1 vaccine demand per quarter (000 doses)
- Cumulative revenue potential (Q3 2009 – Q4 2012)
- Statements on required/planned vaccine volume per country (Western)
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- Other statements on required/planned vaccine volume
- Company statements on required/planned vaccine volume (Medimmune)
- Company statements on required/planned vaccine volume (GSK Biologicals)
- WHO tenders
- About VacZine Analytics
- Disclaimer

PAGES: 22 MS PowerPoint slides, fully referenced/sourced. Available in .pdf form

² HSC/EWRS Statement on Influenza A(H1N1) 2009: target and priority groups for vaccination. European CDC. 25 August 2009.
Available at: http://ec.europa.eu/health/ph_threats/com/Influenza/docs/HSC_EWRS_statement_en.pdf. Accessed September 2009.



Contents – Vaccine demand model (MS Excel-based)

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PROJECT METHODOLOGY:

VacZine Analytics has closely monitored all significant source material pertaining to the H1N1 outbreak. Source materials used are literature articles, government websites, medical bodies and associations, conference proceedings etc. Previously published research focused on H5N1 pre-pandemic vaccines from **VacZine Analytics** has also been utilised.

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3. Sanofi Pasteur receives order from US Government to produce new H1N1 vaccine. Press release. May 25 2009. Available at: http://198.73.159.214/sanofi-pasteur2/ImageServlet?imageCode=25854&siteCode=SP_CORP. Accessed September 2009
4. H1N1 swine flu vaccine. Parliamentary Office of Science and Technology. Available at: <http://www.parliament.uk/documents/upload/postpn331.pdf>. Accessed September 2009
5. H1N1 Swine flu vaccination program. UK Department of Health. 26 June 2009. Available at: http://www.dh.gov.uk/prod_consum_dh/groups/dh_digitalassets/@dh/@en/documents/digitalasset/dh_101630.pdf. Accessed September 2009.
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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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