

****Updated July 2014****

MarketVIEW: Allergic immunotherapy vaccines (CAT: VAMV012)

Product Name	:	MarketVIEW: Allergic immunotherapy vaccines
Description	:	Global vaccine commercial opportunity assessment
Contents	:	Executive presentation + 1 forecast model
Therapeutic Area	:	Immunotherapies
Publication date	:	July 2014
Catalogue No	:	VAMV012

Background

Allergy or Allergic rhinitis is caused by sensitivity to a number of environmental factors including grass, tree and weed pollens, house dust mite and cat dander. Prevalence in adults can range from 17 – 40% and is region/climate dependent. For those patients failing to respond to symptomatic treatments e.g. antihistamines Allergen-specific immunotherapy can be an effective alternative which involves long term treatment with SLIT or SCIT based products.

Current market leaders in Allergen-specific immunotherapies are ALK-Abello (Denmark) and Stallergenes (France) which are currently focused on both global expansion strategies for their existing products e.g. Grazax/Oralair but also new product development to address the major unmet need of a more convenient administration profile(s). In April 2014, Grazax (marketed as Grastek) and Ragwitek (ragweed) were approved in the US, where they are marketed by Merck & Co.

This updated **MarketVIEW** product is a comprehensive commercial opportunity assessment detailing the current market for Allergen-specific immunotherapies with a patient based value/volume forecast for all relevant allergens/administration routes to 2025. The model takes into account significant future events including penetration into new countries/regions and launch of new products. A discussion is also included with regard to latest epidemiology; review of regulatory/reimbursement/pricing issues and a focus on key early stage/late stage R&D development programs along with gap analysis.

Methodology

VacZine Analytics has closely monitored all significant source material pertaining to allergic rhinitis epidemiology/ dynamics, current treatments and novel immunotherapeutics (pipeline). Allergens included have been grass, tree and weed pollens, house dust mite and cat dander. Example, secondary source materials used are literature articles, government websites/databases, medical bodies and associations, conference proceedings and previously analyses (where publically available). Previously published research by **VacZine Analytics** in field of immunotherapeutic vaccines has also been utilised. *****See Bibliography for exact sources.**

PRODUCT CONTENTS:

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

Contents – Summary presentation (MS PowerPoint based)

- Authors Note
- Executive summary
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- Commercial model: key outputs
- Global sales (€m) by region, 2010-25
- Global sales (€m) by allergen, 2010-25
- Global sales (€m) by route, 2010-25
- Global number of patients treated, 2010-25
- US sales (€m) by allergen, 2010-25
- Europe sales (€m) by allergen, 2010-25
- Japan sales (€m) by allergen, 2010-25
- Markets covered and product launches
- Key model assumptions per country
- Model comparison (June 2013 vs. July 2014)
- Allergic immunotherapies background
- Allergic rhinitis disease burden: overview
- Allergic rhinitis prevalence in Europe, US and Japan
- Market dynamics: size and value
- Market dynamics: immunotherapy sales by country
- Market dynamics: immunotherapy sales by company
- Market dynamics: product types
- Market dynamics: immunotherapy sales by route
- Market dynamics: key approvals
- Market dynamics: comments on Grastek potential
- Grazax and Oralair sales, 2008-13, Europe
- Future market trends
- Future market trends: SLIT-tablet product pipeline
- Future market trends: recombinant immunotherapies
- Methodology: allergic rhinitis prevalence and severity
- Methodology: sensitization to inhaled allergens

Continued.....

Methodology: treatment inputs
Methodology: treatment pricing
Allergic immunotherapies: back-up/source material
Bibliography
Disclaimer
About **VacZine Analytics**

PAGES: ~60 MS PowerPoint slides, fully referenced/sourced. Available in .pdf form

Contents – Vaccine demand model(s) (MS Excel-based) – 1 model

Title sheet
CHARTS (Value)
Value summary per country
Value summary by allergen
Patients treated by country
Patients treated by allergen
Country models:
Adult/child
Germany
France
Spain
Italy
Netherlands
Other EU
UK
US
Japan
Other EU
Children
Germany
France
Spain
Italy
Netherlands
Other EU
UK
US
Japan
Other EU
Source material
Global pricing
Market data
Epi model inputs
Allergens
Epi model outputs
Population database

WORKSHEETS: ~65

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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.

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