

\*\*\*\*Now updated November 2011\*\*\*\*

## MarketVIEW: Malaria vaccines (CAT: VAMV017)

Proposal No/#PO	:	[Enter client specific #PO]
Product Name	:	MarketVIEW: malaria vaccines – Global market forecast
Project Initiation Date	:	n/a
Billable days	:	n/a
Initiator(s)	:	[Enter client name, function and address]
Therapeutic Area	:	Travel/endemic vaccines
Product (if applicable)	:	CAT No: VAMV017, updated November 2011

## Background

Malaria (*Plasmodium sp*), a mosquito borne parasitic disease, is a major global killer with an estimated 863,000 deaths in 2008 (World Malaria Report). Currently half the world's population is at risk with vulnerable groups such as young children, pregnant women and the HIV infected of particular concern. Although prevention and treatment paradigms to control malaria have been in place for many years these are dogged by numerous issues such as pathogen resistance, intervention availability and cost; particularly in Sub-Saharan African.

The prospect of a malaria vaccine is appealing because large-scale mass vaccination (as conducted with other diseases) could be implemented in Africa and make a significant impact. GSK Biologicals is developing Mosquirix (RTS, S) in Phase III studies across Africa. Although the vaccine has relatively low efficacy (~40-50%) in preventing clinical episodes and severe malaria it is a major step forward for the industry and is prompting other entities to pursue second generation approaches. RTS,S could be available in 2015/2016.

This **MarketVIEW** product is a comprehensive MS Excel-based model + summary presentation which forecasts the potential commercial value of a malaria vaccine across Western travelers/military and endemic markets (public/private). The model contains value (\$ m) and volume (mio doses) predictions along with launch timeframe, pricing and penetration estimates. **LO/BASE/HI** forecast scenarios based upon vaccine efficacy levels are included to visualize the incremental value of higher performance vaccines.

## Methodology

**VacZine Analytics** has closely monitored all significant source material pertaining to malaria epidemiology/vaccines and. Example, secondary source materials used are literature articles, government websites, medical bodies and associations, conference proceedings and previously analyses (where publically available). Previously published research by **VacZine Analytics** in field of travel endemic vaccines has also been utilised.

### PRODUCT CONTENTS:

**Updated November 2011 (CAT No: VAMV017)**

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

#### Contents – Summary presentation (MS PowerPoint based)

Author's note  
Executive Summary  
Commercial model – key outputs  
Malaria vaccine – total predicted market (\$ 000s): all scenarios  
Africa (<1 yrs) predicted demand (doses 000s) all scenarios  
Africa (1-5 yrs) predicted demand (doses 000s) all scenarios  
Non Africa - predicted demand (doses 000s)  
Africa (<1 yrs) funding required (\$ 000s) all scenarios  
Africa (1-5 yrs) funding required (\$ 000s) all scenarios  
Non Africa - funding required (\$ 000s)  
Non Africa – private market (\$ 000s)  
Traveler's – private market (\$ 000s): hi efficacy only  
Malaria vaccine: segment value analysis (\$ 000s) – BASE  
Commercial model – key sensitivities  
Malaria disease background and epidemiology  
Malaria – countries or areas at risk of transmission, 2009  
Malaria: majority of disease burden due to *P.falciparum*  
Malaria key model assumptions  
The role of a malaria vaccine  
Malaria vaccine opportunity: target product profile  
Case Study: RTS, S malaria vaccine  
Broad market classifications for a malaria vaccine  
Endemic regions: estimated order of country/regions rollout  
Endemic regions: estimated order of vaccine use in target age groups  
Endemic regions: major commercial model assumptions  
Endemic regions: launch dates/per segment by region  
Endemic regions: efficacy determines regional coverage level  
Endemic regions: pricing levels  
Case study for potential malaria catch-up campaigns  
Western travelers: major commercial model assumptions  
Western military: major commercial model assumptions  
Comparison with BCG 2005 analysis – key takeaways  
Commercial model (BASE): detailed comparisons with BCG analysis  
Current pipeline for malaria vaccines: MVI/PATH  
Current pipeline: other major clinical projects  
Backup material  
Bibliography  
**About VacZine Analytics**  
Disclaimer

**PAGES: 50 MS PowerPoint slides, fully referenced/sourced. Available in .pdf form**

**Contents – Vaccine demand model (MS Excel-based)**

**WORKSHEETS: ~65**

Title sheet  
Author's Note  
CHARTS – summary  
CHARTS VAL – Endemic (pub)  
CHARTS VAL – Endemic (private)  
CHARTS VOL – Endemic (pub)  
CHARTS VOL – Endemic (private)  
CHARTS TRAVELERS  
GRAND SUMMARY VALUE ALL  
VALUE SUMMARY - Endemic (pub)  
VOLUME SUMMARY - Endemic (pub)  
VOL/VAL Summary – Endemic (priv)  
VOL/VAL Summary – Travelers  
VOL/VAL Summary – Military  
Endemic markets  
<1 yrs - West Africa (LO)  
1-5 yrs - West Africa (LO)  
<1 yrs - West Africa (BASE)  
1-5 yrs - West Africa (BASE)  
<1 yrs - West Africa (HI)  
1-5 yrs - West Africa (HI)  
<1 yrs - East Africa (LO)  
1-5 yrs - East Africa (LO)  
<1 yrs - East Africa (BASE)  
1-5 yrs - East Africa (BASE)  
<1 yrs - East Africa (HI)  
1-5 yrs - Other Africa (HI)  
<1 yrs - Other Africa (LO)  
1-5 yrs - Other Africa (LO)  
<1 yrs - Other Africa (BASE)  
1-5 yrs - Other Africa (BASE)  
<1 yrs - Other Africa (HI)  
1-5 yrs - Other Africa (HI)  
All (pub/priv) – LO/BASE/HI  
India  
Myanmar  
Bangladesh  
Indonesia  
PNG  
Pakistan  
Brazil  
Afghanistan  
Western Travelers - US  
Western Travelers - EU  
Western Travelers - Japan  
Western Military - US  
Western Military - UK  
Western Military – Other  
Malaria endemic – birth cohorts (Africa)  
Malaria endemic – birth cohorts (Non Africa)  
Disclaimer  
BACK PAGE

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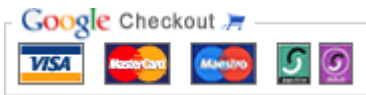
\*A region is North America, Europe or ROW

For orders in the UK, VAT at 20.0% will be added to final invoice total

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To order please contact your region account manager or order direct at [orders@vaczine-analytics.com](mailto:orders@vaczine-analytics.com)

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



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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](http://www.vacZine-analytics.com)

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