

****New release Jan 2012****

MarketVIEW: universal pneumo vaccines (CAT: VAMV030)

Product Name	:	MarketVIEW: <i>universal pneumo vaccines</i>
Description	:	Global vaccine commercial opportunity assessment
Contents	:	Executive presentation + 2 forecast models
Therapeutic Area	:	Novel pediatric vaccines
Publication date	:	January 2012
Catalogue No	:	VAMV030

Background

Vaccines to prevent serious infections caused by *Streptococcus pneumoniae* or “pneumo” currently form the largest component of the global vaccine market (\$4 – 5bn/yr). Notable examples are Prevnar/Prevenar (PCV7) first marketed to cover the seven most common US serotypes causing infant invasive *pneumococcal* disease (IPD) and now recently extended to a new 13-valent form (PCV13). Pfizer vaccines (formerly Wyeth) are also expanding PCV13 indications into older age groups especially those with underlying co-morbidities who are currently vaccinated with 23-valent Pneumovax (PPSV). Pneumococcal vaccines are being rolled out to GAVI-funded markets in developing countries where the burden of pneumo related diseases is more extreme.

The ultimate Pneumo vaccine would be able to prevent disease covered by the majority of ~90 serotypes, cheap to produce and therefore available on a global scale. Investigators in both the commercial and academic/not-for-profit sector are investigating these “universal” protein-based vaccines (PUPV) which could eventually replace conjugated forms although many development challenges remain.

This **MarketVIEW** product is a comprehensive opportunity assessment focused on understanding the commercial potential of new “universal” protein-based vaccines should they be licensed. As well as an Executive presentation, the product contains two detailed value/volume forecast models at the country level which detail all the latest dynamics between product forms and all target groups being in mind evolution in US/EU/ROW policy recommendations. The possible entry of new PUPV(s) is then modelled and current development issues/approaches discussed.

Methodology

VacZine Analytics has closely monitored all significant source material pertaining to pneumococcal disease epidemiology/vaccines. 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 pediatric vaccines has also been utilised. ***See Bibliography for exact sources.

PRODUCT CONTENTS:

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****This product is composed of two models and an Executive presentation

Contents – Executive presentation (MS PowerPoint based)

Author's note
Executive Summary
Pneumo vaccines: key model model outputs
All pneumo vaccines: available market (\$000s) to 2030
All pneumo vaccines: estimated volume ('000s doses) to 2030
Pneumo vaccines by type: available market (\$000s) to 2030
Pneumo vaccines by type: available infant market (\$000s) to 2030
Pneumo vaccines by type: all adult market (HI) (\$000s) to 2030
Pneumo vaccines: adult market 65yrs+ (HI) (\$000s) to 2030
Pneumo vaccines: adult market 18-64yrs (HI) (\$000s) to 2030
Pneumo vaccines by type: all adult market (LO) (\$000s) to 2030
Pneumo vaccines: adult market 65yrs+ (LO) (\$000s) to 2030
Pneumo vaccines: adult market 18-64 yrs (LO) (\$000s) to 2030
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Markets covered to 2030
Populations modelled: per age segment
Key model assumptions: product entry and switching
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Pricing assumptions applied per country
Pricing: reimbursement, private/private split
Adult Pneumo indications and vaccination policies
Adult Pneumo indications: definition of risk segments
Adult Pneumo indications: risk groups % of 18-64 yrs cohort
Adult Pneumo indications and vaccination policies: per country
PCV13: adult roll-out assumptions
PUPV: roll-out overall rationale
PUPV: roll-out assumptions per country
Company reported sales analysis
Pneumo vaccines: company reported sales analysis
Company reported sales analysis by vaccine type
Company reported sales analysis by region (cont...)
Epidemiology of pneumococcal disease
Bacterial meningitis per age group (child)/pathogen US 2003-2007*

CONTINUED.....

Bacterial meningitis per age group (adult)/pathogen US 2003-2007
Epidemiology of pneumococcal disease: post vaccine era
Epidemiology of pneumococcal disease: impact of PCV in US
Epidemiology of pneumococcal disease: non PCV7 serotypes (UK)
Epidemiology of pneumococcal disease: non PCV13 serotypes (UK)
Epidemiology of pneumococcal disease: mortality per serotype
Vaccine coverage rates: infants
Vaccine coverage rates: adults
New Pneumo vaccines: brief overview of current R&D
Concept of a protein based pneumo vaccine
PUPV: ideal product profile
GSK2189242A: recombinant-conjugated vaccine
GSK2189242A: Gambia trial
Sanofi Pasteur: multi-protein based PUPV
Sanofi Pasteur: PUPV Bangladesh trial
Current commercial pneumo vaccine pipeline (clinical)
Novel pneumo protein antigens
PATH – new pneumococcal vaccine development
PATH – pneumo vaccine project: overview of collaborators
Bibliography
Disclaimer
About **VacZine Analytics**

PAGES: ~70 MS PowerPoint slides, fully referenced/sourced. Available in .pdf form

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

*****NOTE*** - there are 2 models (LO & Hi scenarios) each with ~ 90 individual sheets**

Title sheet
Important notes
Charts – Val
Charts – Vol
GRAND VALUE SUMMARY
PCV Vol/Val
PPSV Vol/Val
PUPV Vol/Val
0 – 2 yrs per country
US infant
Canada infant
UK infant
Germany infant
France infant
Italy infant
Spain infant
Belgium infant
Netherlands infant
Greece infant
Portugal infant
Poland infant
Other Europe infant
Australia infant
Japan infant
South Korea infant



CONTINUED.....

Other high income infant
Brazil infant
Mexico infant
Turkey infant
Other UMI infant
Other UMI infant (upside)
GAVI active infant
GAVI planned infant
18 – 49 yrs per country
US “at risk”
Canada “at risk”
UK “at risk”
Germany “at risk”
France “at risk”
Italy “at risk”
Spain “at risk”
Belgium “at risk”
Netherlands “at risk”
Greece “at risk”
Portugal “at risk”
Poland “at risk”
Other Europe “at risk”
Australia “at risk”
Japan “at risk”
South Korea “at risk”
Other HI income 18-64 yrs “at risk”
65+ yrs per country
US >65 yrs
Canada >65 yrs
UK >65 yrs
Germany >65 yrs
France >65 yrs
Italy >65 yrs
Spain >65 yrs
Belgium >65 yrs
Netherlands >65 yrs
Greece >65 yrs
Portugal >65 yrs
Poland >65 yrs
Other Europe >65 yrs
Australia >65 yrs
Japan >65 yrs
South Korea >65 yrs
Other HI income >65 yrs
Populations =>
Births
18-64 yrs
65 yrs only
65 yrs +
Sources =>
PPSV price summary
PCV and PUPV price summary
Pub Priv split
At risk groups
Pipeline
Company reported sales

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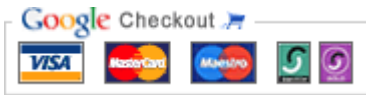
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VacZine Analytics

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

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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