

****New release Sept 2012****

MarketVIEW: Acne vaccines (CAT: VAMV034)

Product Name	:	MarketVIEW: <i>Acne vaccines</i>
Description	:	Global vaccine commercial opportunity assessment
Contents	:	Executive presentation + 1 forecast model
Therapeutic Area	:	Novel adolescent/adult vaccines
Publication date	:	September 2012
Catalogue No	:	VAMV034

Background

Acne vulgaris is a common skin condition which is estimated to affect 80% of people at some point between 11 and 30 years of age. The condition ranges from mild to severe with latter more likely to cause scarring and psychological impact such as depression, loss of self esteem and in extreme cases, suicidal ideation. Acne is responsible for a significant number of yearly physician office visits and direct costs for treatments which range from OTC lotions to prescription based antibiotics/retinoids.

An acne vaccine targeting the main causative bacterium *P.acnes* could have wide utility if it prevents inflammatory outbreaks in individuals suffering from acne. Indeed, the major vaccine manufacturer Sanofi Pasteur has already announced interest in this concept (University of San Diego collaboration) confirming its potential attractiveness.

This **MarketVIEW** product is a comprehensive commercial opportunity assessment which forecasts the potential of acne vaccines (value/volume) to 2030 in the Western region. The product examines different uptake scenarios of the vaccine in severe and non-severe patient groups at different age range(s). Detailed coverage of latest acne epidemiology is included, also a focus on current treatment pathways, costs and the need for a novel vaccine approach. This product is an essential component of any new internal exercise assessing the potential of new acne vaccines.

Methodology

VacZine Analytics has closely monitored all significant source material pertaining to Acne 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/endemic vaccines has also been utilised. *****See Bibliography for exact sources.**

PRODUCT CONTENTS:

Published September 2012 (CAT No: VAMV034)

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

Contents – Executive presentation (MS PowerPoint based)

- Title Page
- Contents
- Author's notes
- Executive Summary
- Commercial model: key outputs
 - Acne vaccine: available market (\$ 000s) to 2030 (severe patients)
 - Acne vaccine: predicted volume (doses 000s) to 2030 (severe patients)
 - Acne vaccine: available market (\$ 000s) to 2030 per country (severe patients)
 - Acne vaccine: available market (\$ 000s) to 2030 (all patients)
 - Acne vaccine: predicted volume (doses 000s) to 2030 (all patients)
 - Acne vaccine: available market (\$ 000s) to 2030 (BASE SCENARIO)
 - Acne vaccine: predicted volume (doses 000s) to 2030 (BASE SCENARIO)
- Acne Vulgaris: disease background and epidemiology
- Acne: brief disease background
- Acne: clinical types
- Acne: global epidemiology
- Acne: adult acne statistics
- Acne: impact of the disease
- Acne: treatment pathway
- Acne: treatment overview
- Acne: treatment options
- Acne: effectiveness of treatment in mild and moderate cases
- Acne: effectiveness of treatment in severe cases
- Acne: cost of treatment
- Acne: cost of treatment in the US
- Acne vaccine; target product profile (TPP)
- The role of an acne vaccine
- Current status of the vaccine
- Pipeline summary
- Addressable vaccine populations
- Acne vaccine forecast model
- Forecast vaccine population flow
- Acne vaccine: target product profile
- Commercial model assumptions
- Detailed commercial model assumptions by country (LO uptake)
- Detailed commercial model assumptions by country (BASE uptake)

Continued.....

Detailed commercial model assumptions by country (HI uptake)
Acne vaccine: other target populations
Bibliography
Disclaimer
About **VacZine Analytics**

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

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

Note: further models can be included with differing vaccine price scenarios

Title page
TOTAL CHARTS (ALL PATIENTS)
TOTAL CHARTS (severe only)
BASE (severe versus non-severe)
CHARTS – VAL HIGH (severe only)
CHARTS – VAL BASE (severe only)
CHARTS – VAL LOW (severe only)
CHARTS – VOL HIGH (severe only)
CHARTS – VOL BASE (severe only)
CHARTS – VOL LOW (severe only)
VALUE SUMMARY (severe only)
VOLUME SUMMARY (severe only)
VALUE SUMMARY (ALL PATIENTS)
VOLUME SUMMARY (ALL PATIENTS)
Country worksheets =>>
US
CANADA
UK
FRANCE
GERMANY
ITALY
SPAIN
AUSTRALIA
JAPAN
Assumptions

Worksheets = 44 per model

PRODUCT COST:

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

- USD \$8995.00/ GBP £5800.00* (Region license)*

*A region is North America, Europe or ROW

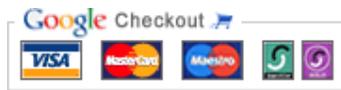
For orders in the UK, VAT at 20% will be added to final invoice total

Indicative only rate will 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. Leyden, J.J. (1997) Therapy for acne vulgaris. *New England Journal of Medicine* 336(16), 1156-1162
2. Collier CN et al. The prevalence of acne in adults 20 years and older (2008). *J. Amer. Acad. Derm.* Vol 58, Issue 1 , Pages 56-59
3. Sharpe, G.R. (1995) Prescribing for acne vulgaris. *Prescribers' Journal* 35(2), 53-58.
4. Patient.co.uk. Acne. Available at: <http://www.patient.co.uk/health/Acne.htm>. Accessed August 2012
5. Kilkenny et al., (1998) The prevalence of common skin conditions in Australian school students: 3. Acne vulgaris. DOI: 10.1046/j.1365-2133.1998.02510
6. Stern R. The presence of acne on the basis of physical examination. (1992) *J. Amer. Acad. Derm.* Vol26, Issue 6, Pages 885-1066
7. Fulton, JR. Acne Vulgaris. Available at: <http://emedicine.medscape.com/article/1069804-overview#a0199>. Accessed August 2012
8. **TABLE DATA:** Perkins et al., (2010) Comparison of the epidemiology of acne vulgaris among Caucasian, Asian, Continental Indian and African American women, *Journal of the European Academy of Dermatology and Venereology*, Volume 25, Issue 9, pages 1054–1060
9. Layton, A.M. (2000) Acne vulgaris and similar eruptions. *Medicine* 28(12), 46-50
10. Adult Acne. Available at: <http://www.acne-control.org.uk/distribution/adult-acne.asp>. Accessed August 2012
11. Mancini AJ. Incidence, prevalence and pathophysiology of acne. Available at: http://jhasim.com/files/articlefiles/pdf/ASM_8_4p100-105.pdf. Accessed August 2012
12. Uhlenhake et al., (2010) Acne vulgaris and depression: a retrospective examination. *Journal of Cosmetic Dermatology*, Mar 9(1), 59-63
13. Hanna et al., (2003) Acne vulgaris: More than skin deep, *Dermatology Online Journal* 9(3): 8
14. UK NHS Choices. Acne Map of Medicine. Available at: <http://www.nhs.uk/Conditions/Acne/Pages/MapofMedicinepage.aspx>. Accessed August 2012
15. American Dermatologist Association. Cited on Acne Resource Website. Available at: <http://www.acne-resource.org/understanding-acne/acne-statistics.html>. Accessed August 2012
16. Schienfeld NS. Acne: A review of diagnosis and treatment. (2007) Continuing Education Credit. P&T, Vol. 32, No. 6
17. AcneNet. Provided by American Academy of Dermatology. Available at: <http://www.skincarephysicians.com/acnenet/treatotc.html>. Accessed August 2012
18. American Academy of Dermatology. Available at: <http://www.aad.org/media-resources/stats-and-facts/conditions/acne>. Accessed August 2012
19. The Lewin Group, The Burden of Skin Diseases, 2004 Available at: <http://www.sidnet.org/pdfs/burden%20of%20skin%20diseases%202004.pdf>111. Accessed August 2012
20. Feldman S. American Physician. Diagnosis and Treatment of Acne. Available at: <http://www.aafp.org/afp/2004/0501/p2123.html>. Accessed August 2012
21. Cost helper. Acne Treatment Costs. Available at: <http://health.costhelper.com/acne-treatments.html>. Accessed August 2012
22. Sanofi Pasteur has signed a new research deal with the University of California, San Diego for its investigational acne vaccine. Available at: <http://www.inpharm.com/news/167732/sanofi-spots-acne-vaccine-opportunity>. Accessed August 2012
23. Agilvax Corporate Website. Available at: <http://www.agilvax.com/pipeline.php>. Accessed August 2012
24. Perry AL et al. (2006) *Propionibacterium acnes*. *Lett Appl Microbiol* 42: 185-188

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 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

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