

\*\*\*\*Published October 2014\*\*\*\*

## MarketVIEW: Herpes Zoster (adult) vaccines

<b>Product Name</b>	:	<b>MarketVIEW: Herpes Zoster (adult) vaccines</b>
<b>Description</b>	:	Global vaccine commercial opportunity assessment
<b>Contents</b>	:	Executive presentation + 2 forecast model(s)
<b>Therapeutic Area</b>	:	Adult/elderly vaccines
<b>Publication date</b>	:	October 2014
<b>Catalogue No</b>	:	VAMV054

### Background

Varicella-zoster virus (VZV) is a ubiquitous human alphaherpesvirus, which after infection in childhood causes a relatively mild self-limiting illness. However, if the virus becomes reactivated later on in life it can cause a painful rash (shingles), often leading to postherpetic neuralgia (PHN). PHN has a significant economic burden because patients require systemic anti-viral therapy and pain management.

A currently licensed live attenuated vaccine exists to prevent the complications of VZV reactivation in adults, known as Zostavax (Merck and Co). Since 2006, the vaccine has been ACIP recommended for people aged >60 yrs, although uptake has been suboptimal. Recently, the UK JCVI committee has recommended all people >70 yrs should receive the vaccine in the UK.

This **MarketVIEW** product is a comprehensive commercial opportunity assessment detailing the potential market for Herpes Zoster vaccines (doses 000s, \$ 000s) to 2030 across Western markets + LATAM. The forecast takes into account the possible introduction of new, improved Zoster vaccines from GSK Biologicals and Merck & Co and discusses their potential impact in terms of cost effectiveness and willingness of new countries to adopt national immunisation programs. Two forecast scenarios are included LOW and HI along with up-to-date discussion of disease dynamics, epidemiology and current research and development status.

## Methodology

**VacZine Analytics** has closely monitored all significant source material pertaining to herpes zoster 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 adult/elderly 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)

- Author's note
- Executive Summary
- Commercial model key outputs
  - Herpes zoster vaccines: forecast revenues (\$m) to 2030 (HI)
  - Herpes zoster vaccines: forecast volume (000 doses) to 2030 (HI)
  - Herpes zoster vaccines: volume (000s doses) and revenue (\$m) by population to 2030 (HI)
  - Herpes zoster vaccines: volume (000s doses) by population and vaccine to 2030 (HI)
  - Herpes zoster vaccines: volume (000s doses) and revenue (\$m) by country to 2030 (HI)
  - Herpes zoster vaccines: market share volume and revenue by country to 2030 (HI)
  - Herpes zoster vaccines: forecast revenues (\$m) to 2030 (scenarios)
- Commercial model key inputs
  - Age ranges/countries modelled
  - Existing vaccinees and penetration
  - Vaccine pricing
  - Market share - competitor zoster vaccines
  - Public/private split
  - Other model considerations
  - Varicella-zoster virus and herpes zoster (shingles): disease background
  - Varicella-zoster virus
    - Varicella-zoster virus - transmission and manifestations
    - Herpes zoster (shingles)
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    - Course of herpes zoster.
    - Complications of herpes zoster – post-herpetic neuralgia.
    - Other complications of herpes zoster.
    - Recurrence of herpes zoster.
    - Hope-Simpson's theory on the pathogenesis of herpes zoster
    - Herpes zoster and stroke risk
    - Theory of herpes zoster pathogenesis illustrated
    - VZV and herpes zoster prevalence
    - Herpes zoster incidence rates.
    - Incidence of herpes zoster is similar across Europe.
    - Effect of age and gender on incidence of herpes zoster

**Continued...**

Focus on LATAM region  
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Economic burden of herpes zoster (2)  
Medical management of herpes zoster in immunocompetent people – antiviral therapy  
Medical management of herpes zoster in immunocompetent people – supplementary therapy.  
Medical management of herpes zoster in immunocompromised patients and special groups  
Herpes zoster vaccine - current product Zostavax  
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Recommendations for herpes zoster vaccination.  
Zostavax uptake  
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Rationale to develop improved herpes zoster vaccines  
V212 (ZVHT): a heat-treated zoster vaccine  
HZ/su (GSK1437173A): a developmental vaccine from GlaxoSmithKline  
Phase III studies of HZ/su (GSK1437173A) in general population  
Phase III studies of HZ/su (GSK1437173A) in special populations  
New Herpes zoster vaccine: commercial considerations  
New Herpes zoster vaccine: target product profile  
Assumptions on future licensing of zoster vaccines  
Assumptions on the future of the zoster vaccine market  
Disclaimer  
About **VacZine Analytics**

**PAGES: 62 MS PowerPoint slides, fully referenced/sourced. Available in .pdf form**

**Contents – Vaccine demand model(s) (MS Excel-based) – 2 models (HI/LO scenarios)**

Title sheet  
Charts - Total Vol and Val  
Charts - Vol and Val by population  
Charts - Vol and Val by country  
Charts - market share  
Vol and Val vaccine and pop  
Vol val by country  
Vol and val general younger  
Vol and val immunocompromised  
USA >60 yrs  
USA 50-59 yrs  
USA >60 yrs immunocompromised  
CANADA >60 yrs



CANADA 50-59 yrs  
CANADA >60 yrs immunocompromised  
FRANCE >60 yrs  
FRANCE 50-59 yrs  
FRANCE >60 yrs immunocompromised  
UNITED KINGDOM >60 yrs  
UNITED KINGDOM 50-59 yrs  
UNITED KINGDOM >60 yrs immunocompromised  
GERMANY >60 yrs  
GERMANY 50-59 yrs  
GERMANY >60 yrs immunocompromised  
ITALY >60 yrs  
ITALY 50-59 yrs  
ITALY >60 yrs immunocompromised  
SPAIN >60 yrs  
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SPAIN >60 yrs immunocompromised  
BRAZIL >60 yrs  
BRAZIL 50-59 yrs  
BRAZIL >60 yrs immunocompromised  
ARGENTINA >60 yrs  
ARGENTINA 50-59 yrs  
ARGENTINA >60 yrs immunocompromised  
MEXICO >60 yrs  
MEXICO 50-59 yrs  
MEXICO >60 yrs immunocompromised  
Populations

**WORKSHEETS: ~50**

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## About VacZine Analytics:

**VacZine Analytics** is an established strategic research agency based in the Spain. 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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