MarketVIEW: *Staphylococcus aureus* vaccines (CAT: VAMV002)

**Product Name:** MarketVIEW: *Staphylococcus aureus* vaccines

**Description:** Global vaccine commercial opportunity assessment

**Contents:** Executive presentation + forecast model

**Therapeutic Area:** Nosocomial vaccines

**Publication date:** April 2012

**Catalogue No:** VAMV002

### Background

*Staphylococcus aureus* (*S. aureus*) is an opportunistic pathogen and a major cause of patient morbidity and mortality, especially in “at risk” populations. The organism can cause a wide range of infections ranging from mild skin infections to life-threatening bloodstream infections and pneumonia. MRSA-VAP (ventilator associated pneumonia) is now the most common invasive infection reported in US ICUs (National Healthcare Safety Network Figures) NHSN\(^1\).

Prophylatic vaccines could prevent *S. aureus* infections and become cost effective in achieving savings from expensive infection control interventions e.g. MRSA screening on admission. Although all major companies have now announced *S. aureus* vaccine programs, Pfizer (SA4Ag) are the most advanced after the failure of Merck & Co (Intercell AG) V710 in Phase II/III (June 2010).

This MarketVIEW product gives a comprehensive vaccine value ($USD/volume (000s) forecast within target nosocomial populations until 2030. The model includes LO/BASE/HI forecast scenarios so the user can visualize the commercial impact of differing targeting/competitive and pricing scenarios. This product is an essential component of any commercial opportunistic assessment focused on nosocomial vaccines.

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Methodology

Using currently available information regarding the profile and predicted deployment of *S. aureus* prophylactic vaccines VacZine Analytics has modelled three potential global vaccine demand scenarios (mio doses) and revenue estimates ($ 000s) based upon detailed analysis of “at risk” target populations across major Western markets. The provided model also gives estimates of market share per major development company and includes adjustable inputs of vaccine penetration, number of doses and pricing.

VacZine Analytics has closely monitored all significant source material pertaining to *S. aureus* epidemiology/vaccines. Source materials used are literature articles, government websites, medical bodies and associations, conference proceedings etc. Previously published research by VacZine Analytics in the nosocomial field has also been utilised.

PRODUCT CONTENTS:

Published April 2012 (CAT No: VAMV002)

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

Contents – Summary presentation (MS PowerPoint based)

- Author’s note
- Contents
- Executive Summary
- Commercial model – key outputs
  - Total global available market ($000s all scenarios), pricing level 1
  - Total global available market ($000s all scenarios), pricing level 2
  - Total global available market ($000s all scenarios), pricing level 3
  - Total predicted demand (doses 000s all scenarios)
  - Total available volume per vaccine segment, US – 2025
- Model forecast comparisons: March 2010 v current (April 2012) – volume/value
- Model forecast comparisons: March 2010 v current (April 2012) – per segment
- Company revenue summary
- Modelling commercial potential
- The role of *S. aureus* vaccine
- Characteristics of the ideal *S. aureus* vaccine
- *S. aureus* vaccine: target product profile (minimum)
- *S. aureus* vaccine: target product profile (ideal)
- Target populations: vaccination strategies
- Vaccine target populations: overview
- Vaccine target populations: scenario definition
- Markets included in model
- Commercial model assumptions: general
- Commercial model assumptions: short-term risk
- Commercial model assumptions: chronic risk
- Model forecast assumptions: comparing March 2010 with current (April 2012)
Continued........

Notes on Pricing
S.aureus vaccines: R&D pipeline
Competitor landscape overview
S.aureus vaccine: estimated launch dates
Pfizer: SA4Ag – background
Pfizer: SA4Ag – Phase I data
GSK: GSK2392103A/Nabi
Other vaccine candidates
Merck & Co/Intercell AG – V710
Staphylococcus aureus: update on infection control
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US situation
Review of latest epidemiology
Acute care hospitals: US
Acute care hospitals: pan-European
Acute care hospitals: UK
Acute care hospitals: Germany
Acute care hospitals: France
Europe: methicillin-resistance disease trends
MRSA: colonization rates
Backup material: methodology
Methodology: general comments – CABG, ESRD & LTCFs
Methodology: general comments – ICU/elective
Methodology: general comments – diabetics
Bibliography
Disclaimer
About VacZine Analytics

PAGES: 80 MS PowerPoint slides, fully referenced/sourced. Available in .pdf form

Contents – Vaccine demand model (MS Excel-based)

Title sheet
TOTAL CHARTS – forecast to 2030
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CHARTS VALUE – pricing level 2
CHARTS VALUE – pricing level 3
CHARTS VOLUME – HIGH
VALUE SUMMARY – pricing level 1
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Elective admissions
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24. Heudorf U et al. [MRSA bloodstream infections in hospitals in Frankfurt/Main, Germany, 2010 : Results of the mandatory notification and suggestions for improvement]. Bundesgesundheitsblatt Gesundheitsforschung Gesundheitsschutz. 2011 Sep 54(9):1126-34.


37. Projected Influenza Vaccination Target Population Sizes, Vaccination Coverage and Doses to be used during the 2008-09 Season http://www.cdc.gov/flu/professionals/vaccination/pdf/influenza_vaccine_target_populations.pdf
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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

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