

\*\*\*\*New release September 2009\*\*\*\*

## MarketVIEW: Group B Streptococcus vaccine (CAT: VAMV008)

<b>Proposal No/#PO</b>	:	<b>[Enter client specific #PO]</b>
<b>Product Name</b>	:	<i>Group B Streptococcus</i> prophylatic vaccine – Major Western markets value/volume forecast
<b>Project Initiation Date</b>	:	n/a
<b>Billable days</b>	:	n/a
<b>Initiator(s)</b>	:	[Enter client name, function and address]
<b>Therapeutic Area</b>	:	<i>Emerging vaccines</i>
<b>Product (if applicable)</b>	:	<b>CAT No:</b> VAMV008, published September 2009

## Background

Group B beta streptococci (GBS) or *Streptococcus agalactiae* is an encapsulated Gram-positive coccus capable of producing a range of diseases in humans of all age ranges. In the neonate, the bacterium can cause severe life threatening sepsis and meningitis (early and late onset disease) due to ascending spread of GBS from the birth canal of colonized females (~30% of total) who are typically asymptomatic. In the 1970s GBS was the leading infectious cause of neonatal morbidity in the US with estimated 7,500-8000 cases occurring annually. Presently, GBS is still estimated to cause disease (EOD+LOD) in approximately 0.5/1000 US births although the widespread implementation of screening and intrapartum antibiotic prophylaxis (IAP) has reduced disease burden dramatically. GBS can also cause life threatening invasive disease in the immunocompromised non-pregnant adult with approximately 4.1 to 7.2 cases per 100,000 population (CDC Figures)<sup>1</sup>. Recent studies indicate that the rate of adult disease may be increasing<sup>2</sup>.

A number of manufacturers are considering the development of a GBS prophylatic vaccine. Such a vaccine may be offered to adolescents to prevent neonatal disease after pregnancy later in life or for older women planning a pregnancy. Other possible uses might be in immunocompromised/elderly individuals who are hospitalized and reside in long-term care facilities.

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<sup>1</sup> US Centers for Disease Control and Prevention. ABC Report: Group B Streptococcus, PROVISIONAL 2008. Available at: <http://www.cdc.gov/ncidod/dbmd/abcs/survreports/gbs08.html>. Accessed September 2009.

<sup>2</sup> Phares CR, Lynfield R, Farley MM, Mohle-Boetani J, Harrison LH, Petit S, et al. Epidemiology of invasive group B streptococcal disease in the United States, 1999-2005. *JAMA*. May 7 2008;299(17):2056-65

## Methodology

Using currently available information regarding the expected profile and predicted deployment of a GBS prophylactic vaccine **VacZine Analytics** has modelled potential vaccine demand (mio doses) and revenue estimates (\$ 000s) per major Western market and vaccine target segments. The provided model also gives estimates of market share per 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 the GBS. Source materials used are literature articles, government websites, medical bodies and associations, conference proceedings etc. Previously published research on hemolytic *Streptococci* **VacZine Analytics** has also been utilised.

### PRODUCT CONTENTS:

**Published September 2009 (CAT No: VAMV008)**

This product is composed of a model and summary presentation

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

The role of a GBS vaccine  
Markets included in model  
Population segments included in model  
Total available volume: Girls 10-12yrs  
Total available volume per GBS vaccine segment (2018)  
Predicted company revenue (\$ 000s) per GBS vaccine (2013-2030)  
Commercial model assumptions for GBS vaccine: US + Canada + Australia  
Commercial model assumptions for GBS vaccine: US + France + Germany  
Commercial model assumptions for GBS vaccine: Italy + Spain + Other EU  
Vaccine uptake and US adolescents (2007/8): case studies for GBS  
Vaccine uptake and US adults (2007/8): case studies for GBS  
HPV vaccine adoption: Western countries  
HPV vaccine adoption: other countries  
About VacZine Analytics  
Disclaimer

**PAGES: 20 MS PowerPoint slides, fully referenced/sourced. Available in .pdf form**

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

Title sheet  
Company value summary  
Company share summary  
Value summary (TOTAL 10-12yrs)  
Volume summary (TOTAL 10-12yrs)  
Value summary (TOTAL 12-18yrs)



Volume summary (TOTAL 12-18yrs)  
Value summary (TOTAL 18-40yrs)  
Volume summary (TOTAL 18-40yrs)  
Value summary (TOTAL 40-75yrs)  
Volume summary (TOTAL 40-75yrs)  
Charts volume  
Charts value  
Prophylatic vaccine (North America)  
US 10-12yrs (females)  
US 12-18 yrs (females)  
US 18-40 yrs (females)  
US 40-75 yrs (all adults)  
Canada 10-12yrs (females)  
Canada 12-18 yrs (females)  
Canada 18-40 yrs (females)  
Canada 40-75 yrs (all adults)  
UK 10-12yrs (females)  
UK 12-18 yrs (females)  
UK 18-40 yrs (females)  
UK 40-75 yrs (all adults)  
France 10-12yrs (females)  
France 12-18 yrs (females)  
France 18-40 yrs (females)  
France 40-75 yrs (all adults)  
Germany 10-12yrs (females)  
Germany 12-18 yrs (females)  
Germany 18-40 yrs (females)  
Germany 40-75 yrs (all adults)  
Italy 10-12yrs (females)  
Italy 12-18 yrs (females)  
Italy 18-40 yrs (females)  
Italy 40-75 yrs (all adults)  
Spain 10-12yrs (females)  
Spain 12-18 yrs (females)  
Spain 18-40 yrs (females)  
Spain 40-75 yrs (all adults)  
Other EU 10-12yrs (females)  
Other EU 12-18 yrs (females)  
Other EU 18-40 yrs (females)  
Other EU -75 yrs (all adults)  
Australia 10-12yrs (females)  
Australia EU 12-18 yrs (females)  
Australia EU 18-40 yrs (females)  
Australia EU -75 yrs (all adults)  
Source material  
Population database  
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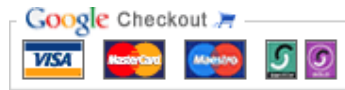
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## About VacZine Analytics:

**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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