

****New release December 2009****

MarketVIEW: Meningitis ACWY vaccines (CAT: VAMV009)

Proposal No/#PO	:	[Enter client specific #PO]
Product Name	:	MarketVIEW: <i>Meningitis ACWY vaccines</i> – US market forecast
Project Initiation Date	:	n/a
Billable days	:	n/a
Initiator(s)	:	[Enter client name, function and address]
Therapeutic Area	:	<i>Meningitis vaccines</i>
Product (if applicable)	:	CAT No: VAMV009, published December 2009

Background

Gram-negative *Neisseria meningitidis* (*N.men*) is an important contributor to bacterial meningitis. Of the estimated 1.2 million cases which occur each year (WHO Figures), *N.men* is thought to be responsible for around 40% of the total where 5 main serogroups ACWY and B are responsible for the majority of disease.

Conjugated vaccines to prevent *meningococcal* disease have had successful impact especially in the United Kingdom (serogroup C, implemented 1999). In 2005, a newer quadrivalent conjugated vaccine with protection against ACWY serogroups, Menactra (MCV4) was recommended for use in US adolescents. To expand the market further new ACWY vaccines such as MenHibrix (GSK), Menveo (Novartis) and also Menactra (Sanofi Pasteur) are aiming for use in infants/toddlers¹. Because of high competition, complex considerations in terms of schedule inclusion and cost-effectiveness, the US market for ACWY will become increasingly sophisticated where success will be governed by newer variables.

This **MarketVIEW** product gives a comprehensive vaccine value (\$USD/volume² (000s) forecast for all products within all age group indications in the critical US market for the next 10-15 years. The model includes **LO/BASE/HI** forecast scenarios so the user can visualize the commercial impact of differing recommendation/competitive and pricing scenarios.

¹ Infant vaccine is assumed 4 dose series (HibMenCY or MenACWY-CRM) or MCV4 (2 dose series) Adolescent/adult vaccine is 1 doses series with revaccination every 5 years according to recent ACIP vaccine recommendation (September 25th 2009).

² For primary and booster doses

Methodology

Using currently available information regarding the profile and predicted deployment of a MenACWY/CY prophylactic vaccines **VacZine Analytics** has modelled three potential US vaccine demand (mio doses) and revenue estimates (\$ 000s) scenarios. 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 MenACWY epidemiology/vaccines. Source materials used are literature articles, government websites, medical bodies and associations, conference proceedings etc. Previously published research by **VacZine Analytics** has also been utilised.

PRODUCT CONTENTS:

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This product is composed of a model and summary presentation

Contents – Summary presentation (MS PowerPoint based)

New meningitis ACWY vaccines: overview
New meningitis ACWY vaccines: predicted US FDA approval
Latest ACIP summary on new MenACWY vaccines
Commercial model assumptions: 0-2 yrs/2-10 yrs (LO/BASE/HI)
Commercial model assumptions: 11-18 yrs/18-55 yrs/>65 yrs (LO/BASE/HI)
New meningitis ACWY vaccines (infant pricing estimates)
Summary US vaccinees
Company/product summary: Sanofi Pasteur/Menactra
Company/product summary: Novartis Vaccines/Menveo
Company/product summary: GSK Biologicals/MenHibrix
Company/product summary: GSK Biologicals/ACWY-TT
Source material:
Vaccine uptake and US adolescents (2007/8): case studies
Vaccine uptake and US adults (2007/8): case studies
HPV vaccine adoption: Western countries
HPV vaccine adoption: other countries
Bibliography
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
Overall Company Summary
Company segment revenue (LO)
Company segment revenue (BASE)
Company segment revenue (HI)
Price per dose
Company volume (LO)
Company volume (BASE)
Company volume (HI)
Completion per course
Doses per course
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Company product share (HI)
Vaccinee summary (US)
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US 2-10 yrs
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US 18-55 yrs
US 55-65 yrs
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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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