

\*\*\*\*Updated March 2010\*\*\*\*

## MarketVIEW: Meningitis ACWY vaccines (CAT: VAMV009)

<b>Proposal No/#PO</b>	:	<b>[Enter client specific #PO]</b>
<b>Product Name</b>	:	MarketVIEW: <i>Meningitis ACWY vaccines</i> – US market 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>Meningitis vaccines</i>
<b>Product (if applicable)</b>	:	<b>CAT No:</b> VAMV009, updated March 2010

## 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, Nimenrix (GSK), Menveo (Novartis, now FDA approved) and also Menactra (Sanofi Pasteur) are aiming for use in infants/toddlers<sup>1</sup>. 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/volume<sup>2</sup> (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.

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<sup>1</sup> 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 25<sup>th</sup> 2009).

<sup>2</sup> 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:

**Published March 2010 (CAT No: VAMV009)**

This product is composed of a model and summary presentation

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

Executive Summary

Global (major markets) – *N. meningitidis* incidence

Global (other markets) – *N. meningitidis* incidence

US meningococcal disease by Age 1997-2008

*N. meningitidis* US cases by Age 1997-2008

*N. meningitidis* US cases by Serogroup 1997-2008

Average Annual Deaths and Case-Fatality Ratios by Serogroup and Age, 1997-2008

*N. meningitidis* US epidemiology: key observations

New meningitis ACWY vaccines: overview

New meningitis ACWY vaccines: estimated US FDA approval

ACIP summary on new MenACWY vaccines: October 2009

Menveo ACIP guidance for use: March 12, 2010

Commercial model assumptions: 0-2 yrs/2-10 yrs (LO/BASE/HI)

Commercial model assumptions: 11-18 yrs/18-55 yrs/55-65 yrs (LO/BASE/HI)

New meningitis ACWY vaccines (infant pricing estimates)

MenACWY vaccines: Summary US vaccinees (000s)

MenACWY vaccines: Summary US volume (Doses 000s)

MenACWY vaccines: Summary US revenue (\$USD 000s)

MenACWY vaccines: Overall company summary

Source material:

Vaccine uptake and US adolescents (2007/8): case studies

Vaccine uptake and US adults (2007/8): case studies

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  
Company product share (LO)  
Company product share (BASE)  
Company product share (HI)  
Vaccinee summary (US)  
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US 2-10 yrs  
US 11-18 yrs  
US 18-55 yrs  
US 55-65 yrs  
BASE SCENARIO  
US 0-2 yrs  
US 2-10 yrs  
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Source material  
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**WORKSHEETS: 35**

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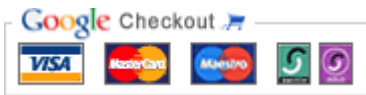
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## About VacZine Analytics:

**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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