

\*\*\*New release August 2010\*\*\*

## MarketVIEW: *Clostridium difficile* vaccines - Emerging markets/ROW (CAT: VAMV018)

Proposal No/#PO	:	[Enter client specific #PO]
Product Name	:	MarketVIEW: Clostridium difficile vaccines – Emerging markets + Rest of World forecast
Project Initiation Date	:	n/a
Billable days	:	n/a
Initiator(s)	:	[Enter client name, function and address]
Therapeutic Area	:	Novel vaccines
Product (if applicable)	:	CAT No: VAMV018, published August 2010

### Background

**Clostridium difficile** (C.diff) is well documented as an important nosocomial pathogen in Western countries responsible for substantial patient morbidity and mortality especially the elderly (> 65yrs) and immunocompromised. However, much less is known regarding disease burden in Emerging (BRIC-M) and “Rest of World” countries where manufacturers of vaccines and biologics are increasingly focused.

This enhanced **MarketVIEW** product is a comprehensive MS Excel-based model + summary presentation which forecasts the potential commercial value of *Clostridium difficile* vaccines across Emerging and “Rest of World” countries. The model contains value (\$ m) and volume (mio doses) predictions for all indications i.e. prophylatic (PX) and therapeutic (TX) of a potential C.diff vaccine and provides incidence estimates of CDI (number of cases) to 2030. The analysis is also informed by in-depth primary research with experts (4 interviews) in C.diff within in the region who provide an up to date picture of current understanding with regard to C.diff epidemiology, trends and outlook for new vaccines. This product is an essential component for any manufacturer wishing to understand further the potential of new CDI vaccines and treatments outside the Western economies.

## Methodology

**VacZine Analytics** has closely monitored all significant source material pertaining to *Clostridium difficile* epidemiology/vaccines in Emerging markets and the Rest of World (ROW) region. Example, secondary source materials used are literature articles, government websites/databases, medical bodies and associations, conference proceedings and previously analyses (where publically available).

As part of this project, **VacZine Analytics** interviewed four experts in *Clostridium difficile* (2 x China, Brazil and Mexico). Previously published research by **VacZine Analytics** in field of *Clostridium difficile* has also been utilized for this project.

### PRODUCT CONTENTS:

**Published August 2010 (CAT No: VAMV018)**

\*\*\*\*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  
Summary for total number of CDI cases (theoretical and treated) in Emerging + ROW region  
2020 Snapshot CDI cases (theoretical)  
Deploying C.diff vaccines: primary prevention (PX)  
C.diff vaccines: three potential markets modelled  
PX indication (community) – total predicted demand (doses 000s)  
PX indication (community) – total available market (\$ USD 000s)  
PX indication (hospital admission) – total available market (\$ USD 000s)  
TX indication (hospital) – total predicted demand (doses 000s)  
TX indication (hospital) – total available market (\$ USD 000s)  
C.diff vaccines: total commercial summary (peak)  
C.diff vaccines – key model assumptions  
C.diff vaccines – countries included in model  
Community prophylaxis – major model assumptions  
Prevention of CDI recurrences (TX) – major model assumptions  
Hospital prophylaxis – major model assumptions  
Primary research – summary of findings  
C.diff (CDI) situation analysis  
Primary research respondents  
Expert viewpoints: nosocomial infections in general  
Expert viewpoints: major pathogens  
Expert viewpoints: reporting surveillance  
Brazil: National Health Surveillance Agency (ANVISA)  
Mexico: National Health Surveillance Agency (SALUD)  
Expert viewpoints: nosocomial infections – incidence estimates  
Expert viewpoints: awareness of *Clostridium difficile*  
Expert viewpoints: is CDI a growing problem?  
Expert viewpoints: test for *Clostridium difficile*  
Expert viewpoints: C.diff molecular epidemiology

**CONTINUED.....**



Expert viewpoints: C.diff as a cause of nosocomial diarrhea  
C.diff as a % of nosocomial diarrhea – Emerging markets/ROW region  
Expert viewpoints: treating CDI  
Country environment factors contributing to CDI  
Expert viewpoints: (use) misuse of antibiotics  
Expert viewpoints: role of hospitals (LOS)  
Expert viewpoints: elderly care/the role of nursing homes  
Other notable patient factors  
Expert Reaction to C.diff R&D pipeline and vaccines  
CDI pipeline: by estimated filing date  
Expert viewpoints: CDI R&D pipeline (all)  
Expert viewpoints: C.diff vaccines – general comments  
Expert viewpoints: deploying C.diff vaccines  
Expert viewpoints: funding C.diff vaccines  
Back-up and source material  
CDI – Western markets  
Definition of at-risk population (community vaccination)  
About VacZine Analytics  
Disclaimer

**PAGES: 60 MS PowerPoint slides, fully referenced/sourced. Available in .pdf form**

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

Title sheet  
CHARTS (PX) comm.  
CHARTS (PX) hosp  
CHARTS (TX)  
CHARTS (Epi)  
Val/Vol summary (PX comm)  
Val/Vol summary (PX hosp)  
Val/Vol summary (TX)  
Vaccine pricing forecast  
Epi summary – CDI  
Prophylaxis (hosp admission)  
All admissions (>65 yrs)  
Emer admissions (>65yrs)  
Elect admissions (>65yrs)  
PX > 65yrs (comm) and TX (RD – first line)  
Brazil  
Russia  
India  
China  
Argentina  
Chile  
Columbia  
Venezuela  
Turkey  
Saudi Arabia  
Poland  
Czech Republic  
Slovakia  
Hungary  
South Africa  
Malaysia



## CONTINUED.....

Singapore  
Indonesia  
Philippines  
Thailand  
South Korea  
Source material  
Nosocomial diarrhea (CDIFF)  
Hospital admissions forecast  
Hospital beds – admissions  
China – hospital statistics  
Brazil – hospital statistics  
Hospital beds (historical)  
Hospital discharges (historical)  
Population database (all ages)  
Population database (65 – 90 yrs)  
Hospital admission breakdown by type  
Back-page

## WORKSHEETS: ~65

## PRODUCT COST:

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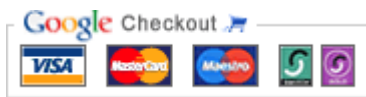
\*A region is North America, Europe or ROW

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Bringing life to vaccine strategy...

## 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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