MarketVIEW: Travelers' diarrhea vaccines (CAT: VAMV028)

Proposal No/#PO : [Enter client specific #PO]
Product Name : MarketVIEW: Travelers’ diarrhea vaccines – Global market forecast
Project Initiation Date : n/a
Billable days : n/a
Initiator(s) : [Enter client name, function and address]
Therapeutic Area : Novel travel/endemic vaccines
Product (if applicable) : CAT No: VAMV028, published October 2011

Background

Travelers' diarrhea (TD), although mainly a self-limiting illness, affects a large percentage of individuals when visiting endemic countries often causing disturbance of itinerary, inconvenience and additional cost. In extreme cases TD can result in hospitalization, especially in travelers with chronic illnesses. Accumulating evidence also suggests that TD may cause post-infectious irritable bowel (IBS) syndrome in around 3% of cases.

Enterotoxigenic Escherichia coli bacteria are a common cause of TD (~45% of cases). The pathogen has been a primary focus of new TD vaccine development for many years with numerous approaches taken but with little success. Currently the marketed cholera vaccine Dukoral® (J&J/Crucell) has been shown to demonstrate some protection against ETEC induced diarrhea although it is short-lived prompting some countries not to fully recommend its use for TD. Clearly a new TD vaccine with higher efficacy, broader pathogen coverage and longer protection is required not only for travelers but children in developing countries.

This MarketVIEW product is a comprehensive opportunity assessment investigating the commercial potential of hypothetical new TD vaccine for the Western travelers visiting TD endemic countries. The product consists of a detailed Executive presentation covering all relevant topics to new TD vaccine commercialization including ideal target product profile, research and clinical development issues and potential impact on Dukoral®. Also included is a detailed MS Excel value/volume demand forecast to 2030 for all relevant countries with sensitivity analysis.

This product is an ideal tool to aid early stage decision making in new TD vaccine development.
Methodology

*VacZine Analytics* has closely monitored all significant source material pertaining to Travelers’ diarrhea disease epidemiology/dynamics, current treatments and novel immunotherapeutics (pipeline). Example, secondary source materials used are literature articles, government websites/databases, medical bodies and associations, conference proceedings and previously analyses (where publically available). Previously published research by *VacZine Analytics* in field of bacterial vaccines has also been utilised. ***See Bibliography for exact sources.***

**PRODUCT CONTENTS:**
Published October 2011 (CAT No: VAMV028)

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

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

Contents  
Author’s Note  
Executive summary  
New Travelers’ diarrhea (TD) vaccine – key model outputs  
Travelers’ diarrhea/cholera - vaccine market to 2030 ($ 000s)  
New Travelers’ diarrhea vaccine: market by region to 2030 ($ 000s)  
New Travelers’ diarrhea vaccine: volume by region to 2030 ($ 000s)  
New Travelers’ diarrhea vaccine: key model sensitivities  
Travelers’ diarrhea - disease background  
Travelers’ diarrhea - overall risk factors  
Travelers’ diarrhea - risk areas  
Travelers’ diarrhea - causative pathogens (bacterial)  
Travelers’ diarrhea - causative pathogens (viral/parasites)  
Travelers’ diarrhea - regional distribution of most common pathogens  
Travelers’ diarrhea - economic burden  
Travelers’ diarrhea - impact on military  
Travelers’ diarrhea - current management/vaccination  
Travelers’ diarrhea - commonly used drugs  
Dukoral - mechanism of action  
Dukoral - product profile  
Dukoral - efficacy against ETEC  
Designing a new Travelers’ diarrhea vaccine  
Background to Travelers’ diarrhea vaccine development  
Summary of vaccine approaches to date  
Travelers’ diarrhea vaccine antigens and immunology  
Distribution of ETEC LT/ST antigens in global isolates  
Distribution of ETEC CF antigens in global isolates  
Comments on new TD vaccine strategies  
Coverage of a hypothetical new TD vaccine  
Ideal TD vaccine - target product profile  
Required effectiveness of an ETEC vaccine (travelers)
CONTINUED............

TD vaccines: current R&D pipeline
ETEC specific vaccines: notes on development
ETEC specific vaccines: research priorities
New TD vaccines - incorporating Shigella
New TD vaccine – assessing commercial value
Estimated Trips to TD endemic regions (2011)
TD travelers segment: overview of modeling strategy
Model assumptions: new TD vaccine - US/CAN
Model assumptions: new TD vaccine - UK/Canada/Germany
Model assumptions: new TD vaccine - Italy/Spain/Canada
Model assumptions: new TD vaccine - Aust/Korea/Japan
Dukoral vaccine estimated penetration rates (2010 – 2018 onwards)
Vaccine prices used in model (2010 – 2018 onwards)
New TD vaccine: potential impact on Dukoral
Dukoral decline rates used in model (2018 onwards)
New TD vaccine: comparison with BVGH analysis (2011)
Major model caveats and limitations
A childhood ETEC vaccine – discussion of major issues
Order of evaluation for ETEC childhood vaccine
Predicted market value of a childhood ETEC vaccine
Appendix I – backup and source material
Notes on Shigellosis
Focus on ETEC pathogenesis
Comparing ETEC with Cholera
Case study: whole cell ETEC/CTB
Example penetration rates of travel vaccines
Travel vaccine penetration rates: Japan
Dukoral - background (market/financial)
Market value estimation for Cholera vaccine
Dukoral vaccine penetration rates (Crucell)
Bibliography
Disclaimer

About VacZine Analytics

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

Contents – Vaccine demand model (MS Excel-based)

Title sheet
CHARTS (VAL)
CHARTS (VOL)
Sensitivity analysis
Grand value summary
New TD – value summary
Dukoral – value summary (estimated)
Global price summary
New TD vaccine – volume summary
Dukoral volume summary (estimated)
Country worksheets ➔
North America and EU
US Travelers (TD)
Canada Travelers (TD)
UK Travelers (TD)
France Travelers (TD)
Germany Travelers (TD)
Italy Travelers (TD)
Spain Travelers (TD)
Denmark Travelers (TD)
Finland Travelers (TD)
Norway Travelers (TD)
Sweden Travelers (TD)
Rest of World ➔
Australia Travelers (TD)
Japan Travelers (TD)
S Korea Travelers (TD)
Source material
Trips to TD endemic countries
TD Trips – CHARTS
VA Travel data
Peds Travel
Travel planning and duration
Example travel market sizes
Travel vaccine penetration rates (Japan)
Back page

WORKSHEETS: ~40
PRODUCT COST:

VacZine Analytics will grant a [enter region] license to [enter client name], for the price of:

- USD $8995.00/ GBP £5600.00* (Region license)*

*A region is North America, Europe or ROW
For orders in the UK, VAT at 20% will be added to final invoice total
#Indicative - conversions to other currencies will be effected on date of transaction.

HOW TO ORDER:

To order please contact your region account manager or order direct at orders@vaczine-analytics.com
This report can also be purchased on-line. Please review the TERMS and CONDITIONS of purchase.

VacZine Analytics (R) is a trading division of Assay Advantage Ltd, UK Company Number: 5807728
VacZine Analytics (R) and the “spiral logo” are UK Registered Trademarks, 2009
BIBLIOGRAPHY:


47. S.B. Formal et al. Effect of prior infection with Shigella flexneri 2a on the resistance of monkeys to subsequent infection with Shigella sonnei, J. Infect. Dis 164 (1991) 534e537.


TERMS and CONDITIONS:
VacZine Analytics – a trading division of Assay Advantage Ltd UK Company Number: 5807728 (Herein referred to as “The Company”). (Herein [enter client name] to as “The Client”).

1. This finished research product is provided is provided as a Service. Any additional Service required by the client will be subject to a new proposal being prepared.
2. The Service will commence after written (e-mail) or Fax confirmation stating the Client’s acceptance of the Service according the description proposed by the Company.
3. Cancellation policy. The Company’s cancellation policies are in accordance with the EU Consumer Protection (Distance Selling) Regulations 2000 (DSRs). Prior to acceptance of an order the Company will make available written information regarding Clients cancellation rights. This is posted on the Company website and is available for public review.
4. Cancellation rights: For finished documents - a Clients cancellation rights will last for seven working days counting from the day that the order was concluded. If the Services i.e. provision of the documents has taken place with the Clients agreement before this period the Client’s cancellation rights have ended.
5. Invoicing will 100% after submission of deliverables to the Client in a form reasonably acceptable to the Client.
6. If not purchased on line invoices are payable within thirty days of the invoice date.
7. All proposals are quoted in $USD dollars or £GBP and invoices are to be settled in the same currency.
8. The Company agrees not to disclose to any third party confidential information acquired in the course of providing the services listed without the prior written consent of the Client. Exception occurs when the information is already in the public domain or when disclosure is necessary to help the Company’s employees and agents with the performance of the Company’s obligations to achieve satisfactory completion of the project and approved in writing by the Client.
9. Force Majeure: The Company will not be liable for any delay or failure to perform any obligation under this Agreement insofar as the performance of such obligation is prevented by an event beyond our reasonable control, included by not limited to, earthquake, fire, flood or any other natural disaster, labour dispute, riot, revolution, terrorism, acts of restraint of government or regulatory authorities, failure of computer equipment and failure or delay of sources from which data is obtained.
10. Please also refer to Master TERMS and CONDITIONS available upon request.

VacZine Analytics
Warren House
Bells Hill
Bishops Stortford
Herts
CM23 2NN
United Kingdom
Tel: +44 (0) 1279 654514 / +44 (0) 7952470582 / Fax: +44 (0) 1279 655926
E-mail: info@vacZine-analytics.com
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)

**VacZine Analytics (R)** is a trading division of Assay Advantage Ltd, UK Company Number: 5807728

**VacZine Analytics (R)** and “the spiral logo” are UK Registered Trademarks, 2009