

\*\*\*\*Published June 2018\*\*\*\*

## MarketVIEW: Seasonal influenza vaccines (CAT: VAMV036)

<b>Product Name</b>	:	<b>MarketVIEW: Seasonal influenza vaccines</b>
<b>Description</b>	:	Global vaccine commercial opportunity assessment
<b>Contents</b>	:	Executive presentation (~220 slides.pdf) + forecast model(s) (.xls)
<b>Therapeutic Area</b>	:	<b>Seasonal influenza vaccines</b>
<b>Publication date</b>	:	June 2018
<b>Catalogue No</b>	:	VAMV036

## Background

Annual **influenza** epidemics typically affect 5-15% of the population with mainly upper respiratory tract infections. On a global basis around 3-5 million cases of severe illness are estimated each year with an associated 250,000 – 500,000 deaths (WHO figures). Annual influenza vaccination is the most effective method for preventing influenza virus infection and its complications. Recommended groups for influenza vaccination are usually those most vulnerable and include the elderly, very young and those with underlying chronic diseases. In the US, influenza vaccination recommendations now include every person >6 mos. Influenza vaccines are still predominantly of the trivalent inactivated format (TIV) although latest advances include the addition of another B virus strain to form **Quadrivalent (QIV) vaccines** which now make up most of the US market.

This **MarketVIEW** product is a comprehensive MS Excel-based model + summary presentation (.pdf) which forecasts the potential commercial volume and value of seasonal influenza vaccines across **13** individual major Western<sup>1</sup> and **21** emerging or “rest of world” markets to 2034. The model contains validated volume (mio doses) estimates for all recommended target groups per country based on a thorough investigation of national recommendations and policy and detailed country-specific vaccine coverage rates. Country market values are ascertained by a pricing methodology based upon public/private sector prices for TIVs, QIVs, high dose (HD), LAIV and other forms where the impact of discounting is explored. The analysis contains a detailed US forecast by product type and individual competitor including **Seqirus'** new QIV (Flucelvax), MF-59 adjuvanted **FLUAD** and **Sanofi's HD portfolio** (Fluzone + Flublok). An updated methodology is introduced to estimate the adoption of QIV products outside of the key US market looking at 9 ROW suppliers. An updated analysis of the UK childhood program is included with the hypothetical value of further childhood programs also assessed.

---

<sup>1</sup> US + Canada + M5EU + Other EU, Other PAHO is included

## Methodology

**VacZine Analytics** has closely monitored all significant source material pertaining to seasonal influenza vaccines in each respective market. Source materials used are literature articles, government websites, medical bodies and associations, conference proceedings etc. Previously published research by **VacZine Analytics** in the field of viral pathogens has also been utilised.

### PRODUCT CONTENTS:

Published June 2018 (CAT No: VAMV036)

\*\*\*\*This product is a [summary presentation \(.pdf\)](#), [a forecast model \(.xls\)](#) and information workbook(s) (.xls)<sup>2</sup>

### Contents – Summary presentation (.pdf)<sup>3</sup>

Contents

Author's notes

Executive summary

**[SECTION]** Seasonal influenza vaccines: key model outputs [15 slides]

**[SECTION]** Season influenza - burden of disease/review of global season 2017/18 [8 slides]

**[SECTION]** Review of US season 2017/18 [22 slides]

**[SECTION]** Review of EU season 2017/18 [8 slides]

**[SECTION]** Review of latest EU influenza vaccine recommendations [22 slides]

**[SECTION]** EU influenza vaccine coverage levels [9 slides]

**[SECTION]** Review of EU supply and demand volumes [6 slides]

**[SECTION]** Review of Australia and Brazil seasons 2017/18 [8 slides]

**[SECTION]** Review of latest ROW influenza vaccine recommendations [15 slides]

**[SECTION]** Review of ROW supply and demand volumes [5 slides]

**[SECTION]** Update on major competitor activity and forecasts [46 slides]

**[SECTION]** Modelling potential demand/commercial value [23 slides]

References/bibliography

About **VacZine Analytics**

Disclaimer

**PAGES: ~220 slides fully referenced/sourced. Available in .pdf form**



**SNAPSHOT**

<sup>2</sup> Influenza vaccine coverage rates per country per target group

<sup>3</sup> Full contents i.e. title per slide is available upon request

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

Title sheet  
CHARTS →  
Global Val/Vol  
USA Val/Vol  
West (excl USA) Val/Vol  
UK Val/Vol  
ROW Val/Vol  
QIV adoption  
Value summaries →  
Global (all) val vol  
West excluding USA + ROW QIV val/vol  
Hypothetical EU childhood program(s)  
Demand analyses →  
Grand value ROW (pub & priv)  
Grand value WEST (pub & priv)  
Weighted average pricing 2014, 2017  
Pricing summary – TIV (all types)  
Pricing summary – QIV (all types)  
Pricing summary – LAIV  
Pricing summary – ID and other  
Grand volume ROW (pub & priv)  
Grand volume WEST (pub & priv)  
Total volume sum (private ROW)  
Total volume sum (private West)  
Total volume sum (public ROW)  
Total volume sum (public West)  
Volume summary (infant risk)  
Volume summary (2-19 yrs risk)  
Volume summary (19-65 yrs risk)  
Volume summary (> 65 yrs)  
Private sector growth rates  
Country worksheets (all segments, 4 worksheets per country)  
USA  
Canada  
United Kingdom  
UK program  
France  
Germany  
Italy  
Austria  
Belgium  
Greece  
Netherlands  
Poland  
Sweden  
Argentina  
Australia  
Brazil  
China  
Hong Kong  
India  
Indonesia  
Japan  
Macau  
Malaysia  
Mexico  
Mongolia  
Nepal  
Pakistan  
Philippines

Russia  
South Korea  
Taiwan  
Thailand  
Turkey  
Vietnam  
New Zealand  
Other PAHO  
Resources =>>  
Competitor sales and forecasts  
US vol by age CDC validation  
US historical production  
US by format  
US competitor Val Vol forecast  
Sanofi Pasteur sales  
Sanofi Pasteur graphs  
GSK & AZMedImmune & Seqirus (graphs)  
All top suppliers (reported sales)  
Supplier's unit prices  
QIV pricing trends  
Country actual vol data (EU)  
Country recommendations database ROW  
Country actual vol data (ROW)  
WHO schedules – influenza (pediatric and adult)  
Population databases  
% private  
Risk groups  
Back page

**Worksheets = >120 interconnected**



**PRODUCT COST:**

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

- FULL PRODUCT - USD **\$12,995.00**/ GBP **£9845.00**# (Region license)\*
- PRESENTATION OR MODEL ONLY - USD **\$9795.00**/£**7420** (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 prevailing rate will be applied on date of transaction

**HOW TO ORDER:**

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



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

**VacZine Analytics** © and the “**spiral logo**” are UK Registered Trademarks, 2009

**BIBLIOGRAPHY**

135 references – available upon request



**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. All Rights Reserved. This finished research product is a licensed product. It may not be reproduced, stored in a retrieval system or transmitted in any form without the written permission of the Company **VacZine Analytics** (of division of Assay Advantage Ltd).
2. The license granted by the Company to the Client will be non-exclusive, non-transferable and should only be used for the Client business purposes at the agreed Client sites/location in accordance with this agreement. The Client will have no ownership rights over the research product.
3. Invoicing will **100%** after submission of the deliverables (.pdf) and (.xls) to the Client.
4. If not purchased on line invoices are payable within **thirty days** of the invoice date.
5. All proposals are quoted in **\$USD dollars or £GBP or €euro** and invoices are to be settled in the same currency.
6. The Company agrees not to disclose to any third party confidential information acquired in the course of providing the research product 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.
7. 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.
8. Please also refer to Master **TERMS and CONDITIONS** available upon request.

**VacZine Analytics**

A division of Assay Advantage Ltd

Warren House

Bells Hill

Bishops Stortford

Herts

CM23 2NN

United Kingdom

Tel: +44 (0) 1279 654514 / +44 (0) 7952470582 / Fax: +44 (0) 1279 927049

E-mail: [info@vaczine-analytics.com](mailto: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** ® is a trading division of Assay Advantage Ltd, UK Company Number: 5807728

**VacZine Analytics** ® and "the spiral logo" are UK Registered Trademarks, 2009

