

****Published October 2018****

MarketVIEW: Seasonal influenza vaccines (CAT: VAMV036)

Product Name	:	MarketVIEW: Seasonal influenza vaccines
Description	:	Global vaccine commercial opportunity assessment
Contents	:	Executive presentation (~240 slides.pdf) + forecast model(s) (.xls)
Therapeutic Area	:	Seasonal influenza vaccines
Publication date	:	October 2018
Catalogue No	:	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 Western¹ 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**, **Sanofi's HD portfolio** (Fluzone + Flublok) and others. 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.

¹ 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:

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

Contents – Summary presentation (.pdf)³

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: ~240 slides fully referenced/sourced. Available in .pdf form



SNAPSHOT

² Influenza vaccine coverage rates per country per target group

³ 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)*
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*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

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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.

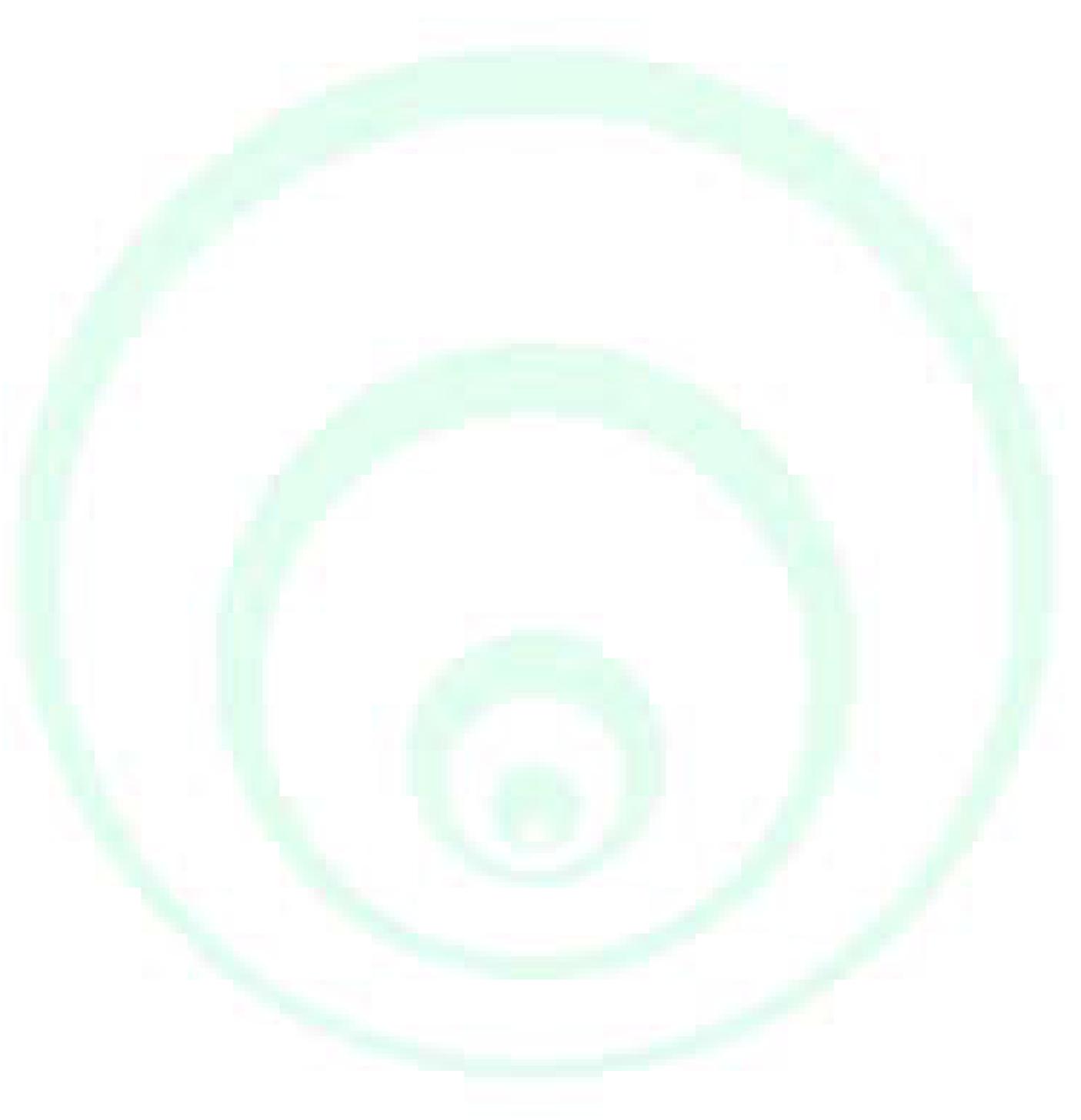


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BIBLIOGRAPHY

135 references – available upon request



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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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