MarketVIEW: Herpes Zoster (adult) vaccines

**Product Name**: MarketVIEW: Herpes Zoster (adult) vaccines

**Description**: Global vaccine commercial opportunity assessment

**Contents**: Executive presentation + 2 forecast model(s)

**Therapeutic Area**: Adult/elderly vaccines

**Publication date**: October 2014

**Catalogue No**: VAMV054

**Background**

Varicella-zoster virus (VZV) is a ubiquitous human alphaherpesvirus, which after infection in childhood causes a relatively mild self-limiting illness. However, if the virus becomes reactivated later on in life it can cause a painful rash (shingles), often leading to postherpetic neuralgia (PHN). PHN has a significant economic burden because patients require systemic anti-viral therapy and pain management.

A currently licensed live attenuated vaccine exists to prevent the complications of VZV reactivation in adults, known as Zostavax (Merck and Co). Since 2006, the vaccine has been ACIP recommended for people aged >60 yrs, although uptake has been suboptimal. Recently, the UK JCVI committee has recommended all people >70 yrs should receive the vaccine in the UK.

This MarketVIEW product is a comprehensive commercial opportunity assessment detailing the potential market for Herpes Zoster vaccines (doses 000s, $ 000s) to 2030 across Western markets + LATAM. The forecast takes into account the possible introduction of new, improved Zoster vaccines from GSK Biologicals and Merck & Co and discusses their potential impact in terms of cost effectiveness and willingness of new countries to adopt national immunisation programs. Two forecast scenarios are included LOW and HI along with up-to-date discussion of disease dynamics, epidemiology and current research and development status.
Methodology

**VacZine Analytics** has closely monitored all significant source material pertaining to herpes zoster vaccines. 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 adult/elderly vaccines has also been utilised. **See Bibliography for exact sources.**

**PRODUCT CONTENTS:**
Published October 2014 (CAT No: VAMV054)

****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
Herpes zoster vaccines: forecast revenues ($m) to 2030 (HI)
Herpes zoster vaccines: forecast volume (000 doses) to 2030 (HI)
Herpes zoster vaccines: volume (000s doses) and revenue ($m) by population to 2030 (HI)
Herpes zoster vaccines: volume (000s doses) by population and vaccine to 2030 (HI)
Herpes zoster vaccines: volume (000s doses) and revenue ($m) by country to 2030 (HI)
Herpes zoster vaccines: market share volume and revenue by country to 2030 (HI)
Herpes zoster vaccines: forecast revenues ($m) to 2030 (scenarios)
Commercial model key inputs
Age ranges/countries modelled
Existing vaccinees and penetration
Vaccine pricing
Market share - competitor zoster vaccines
Public/private split
Other model considerations
Varicella-zoster virus and herpes zoster (shingles): disease background
Varicella-zoster virus
Varicella-zoster virus - transmission and manifestations
Herpes zoster (shingles)
Presentation and symptoms of herpes zoster
Course of herpes zoster.
Complications of herpes zoster – post-herpetic neuralgia.
Other complications of herpes zoster.
Recurrence of herpes zoster.
Hope-Simpson’s theory on the pathogenesis of herpes zoster
Herpes zoster and stroke risk
Theory of herpes zoster pathogenesis illustrated
VZV and herpes zoster prevalence
Herpes zoster incidence rates.
Incidence of herpes zoster is similar across Europe.
Effect of age and gender on incidence of herpes zoster
Continued…

Focus on LATAM region
Economic burden of herpes zoster (1)
Economic burden of herpes zoster (2)
Medical management of herpes zoster in immunocompetent people – antiviral therapy
Medical management of herpes zoster in immunocompetent people – supplementary therapy.
Medical management of herpes zoster in immunocompromised patients and special groups
Herpes zoster vaccine - current product Zostavax
Rationale for vaccination against herpes zoster
Zostavax – formulation and development.
The Shingles Prevention Study – design and efficacy
Shingles Prevention Study – long-term efficacy of Zostavax and immunology.
Zostavax in people aged 50–59 years: ZEST study.
Safety of Zostavax
Licensing history of Zostavax
Cost-effectiveness of Zostavax
Recommendations for herpes zoster vaccination.
Zostavax uptake
Reasons for poor uptake of Zostavax
Zostavax sales data - Merck & Co.
Zostavax and the UK
Herpes zoster vaccine - overview of current R&D
Rationale to develop improved herpes zoster vaccines
V212 (ZVHT): a heat-treated zoster vaccine
HZ/su (GSK1437173A): a developmental vaccine from GlaxoSmithKline
Phase III studies of HZ/su (GSK1437173A) in general population
Phase III studies of HZ/su (GSK1437173A) in special populations
New Herpes zoster vaccine: commercial considerations
New Herpes zoster vaccine: target product profile
Assumptions on future licensing of zoster vaccines
Assumptions on the future of the zoster vaccine market
Disclaimer
About VacZine Analytics

PAGES: 62 MS PowerPoint slides, fully referenced/sourced. Available in .pdf form

Contents – Vaccine demand model(s) (MS Excel-based) – 2 models (HI/LO scenarios)
Title sheet
Charts - Total Vol and Val
Charts - Vol and Val by population
Charts - Vol and Val by country
Charts - market share
Vol and Val vaccine and pop
Vol val by country
Vol and val general younger
Vol and val immunocompromised
USA >60 yrs
USA 50-59 yrs
USA >60 yrs immunocompromised
CANADA >60 yrs
CANADA 50-59 yrs
CANADA >60 yrs immunocompromised
FRANCE >60 yrs
FRANCE 50-59 yrs
FRANCE >60 yrs immunocompromised
UNITED KINGDOM >60 yrs
UNITED KINGDOM 50-59 yrs
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GERMANY >60 yrs
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ITALY >60 yrs
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SPAIN >60 yrs
SPAIN 50-59 yrs
SPAIN >60 yrs immunocompromised
BRAZIL >60 yrs
BRAZIL 50-59 yrs
BRAZIL >60 yrs immunocompromised
ARGENTINA >60 yrs
ARGENTINA 50-59 yrs
ARGENTINA >60 yrs immunocompromised
MEXICO >60 yrs
MEXICO 50-59 yrs
MEXICO >60 yrs immunocompromised

Populations

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BIBLIOGRAPHY:

46. Sanofi Pasteur MSD. Zostavax summary of product characteristics. 2013
58. Harpaz R et al. Update on herpes zoster vaccine licensure for persons aged 50 through 59 years. MMWR. 2011; 60: 1528
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About VacZine Analytics:

VacZine Analytics is an established strategic research agency based in the Spain. 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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