

****Published February 2018****

MarketVIEW: Opioid use disorder (OUD) vaccines (CAT: VAMV078)

Product Name	:	MarketVIEW: Opioid use disorder (OUD) vaccines
Description	:	Opioid use disorder (OUD) vaccines: global market forecast, market size
Contents	:	Executive presentation (140 slides, .pdf) + 1 MS Excel workbook (.xls)
Therapeutic Area	:	Novel addiction vaccines
Publication date	:	February 2018
Catalogue No	:	VAMV078

Background

Opioid use disorder (OUD) is a chronic relapsing condition characterized by a problematic pattern of heavy, uncontrolled opioid use. In the United States, OUD usually involves consumption of either: licensed prescription painkillers such as oxycodone, hydromorphone, or illicit street drugs such as heroin and synthetic analogues such as fentanyl. Recently, the US prevalence of OUD has reached epidemic levels. During 2015, approximately **2.1m** and **0.59m** individuals had OUD associated with prescription painkillers and heroin respectively (0.8 and 0.2 per 100 persons, CDC figures). Past year use numbers are as high as 13-15m people (US) and 1.3m (EU). OUD has caused a massive surge in the number of US hospitalizations, emergency department visits and overdose deaths. The 2016 US figure of **~42,000 overdose deaths** was the highest on record. OUD is lowering the life-expectancy of the average American and has significant socio-economic impact.

Medication-assisted therapy (MAT) treatment involving methadone (OTP only), buprenorphine and naltrexone, in combination with psychosocial counselling, can stabilize the opioid user either through detoxification or maintenance strategies. However, these treatments have strong safety considerations and are associated with high relapse or discontinuation. Moreover, only a fraction of opioid users initiate therapy. New interventions are desperately needed. Opioid hapten-based conjugated vaccine technologies have shown promising effects in preclinical models. Ideally, an OUD vaccine should block the addictive and toxic effects of opioids decreasing patient relapse, possibly in combination with existing therapies. An OUD vaccine could be safer, have a longer efficacy duration and possibly better compliance than existing small molecule therapies.

This **MarketVIEW** product consists of a detailed Executive presentation (~140 .pdf slides) and comprehensive MS-Excel workbook (.xls) which forecast the potential commercial value/volume of an OUD vaccine across 8 major western markets¹ to 2045. Three scenarios have been modelled which explore vaccine uptake at various access points along the patient treatment continuum. A thorough situation review (global epidemiology) is included along with discussion of current treatments, prevention strategies, major R&D initiatives, and competitive environment. Vaccine technologies are reviewed along with TPP generation, pricing considerations and all modelling assumptions. This study is designed to inform any party wishing to understand and seek justification for the business case of this important vaccine.

¹ United States, Canada, United Kingdom, France, Germany, Italy, Spain, and Australia

Methodology

VacZine Analytics has closely monitored all significant source material pertaining to global opioid use disorder (OUD) epidemiology, treatment in-patient datasets, vaccine development, competitive environment, recommendations, policy. Source materials used are literature articles, government websites, medical bodies and associations, conference proceedings, news articles, expert comment etc.

PRODUCT CONTENTS:

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****This product is composed of **one Excel workbook (.xls)**² and **an Executive presentation (.pdf)**³

Authors note

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OUD vaccines: predicted volumes (000s) per scenario from 2030

OUD vaccines: predicted revenues (\$ 000s)/country scenario 1 from 2030

OUD vaccines: predicted revenues (\$ 000s)/country scenario 2 from 2030

OUD vaccines: predicted revenues (\$ 000s)/country scenario 3 from 2030

Predicted target patient volumes (000s) per scenario from 2030

Drug (methadone, buprenorphine, naltrexone treated patient volumes) (000s) per scenario from 2030

OUD vaccines: price sensitivity analysis

[Section] Opioids – Background and epidemiology

[Section] Opioid use disorder – Treatment and management

[Section] The opioid crisis – Review of national prevention strategies, US

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[Section] Opioid use disorder vaccine – Modelling commercial potential

Appendices: Back-up and source material

Bibliography

About **VacZine Analytics**

Disclaimer

Slide number = 140 (.pdf)

Model worksheet number 50 (.xls)

SNAPSHOT

² Model contents available on request (.xls)

³ Presentation titles may apply to more than one slide (.pdf form only)

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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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