

Seasonal influenza vaccines and the mRNA threat

LONDON, UK----19th November 2020----ExpertREACT. The global market for influenza vaccines continues to expand driven more recently by the COVID19 pandemic, but the clock is still ticking for egg-based production systems

Annual **seasonal influenza** or 'flu' epidemics typically affect 5-15% of the population with respiratory tract infections that can range from mild to severe, requiring hospitalization. On a global basis around 3-5 million cases of severe illness are estimated each year with an associated **290,000 - 650,000** deaths (WHO figures). Although for 2020/21, influenza levels are below normal, annual influenza vaccination is still the most effective method for preventing virus infection and its complications, now more so during the COVID-19 pandemic. Recommended groups for influenza vaccination are usually those most vulnerable which include the elderly, very young and those with underlying chronic diseases but uptake varies widely per country. The US has extensive influenza vaccination recommendations which include every person >6 mos.

Globally, many seasonal influenza vaccines are still of the trivalent inactivated format (TIV) and are produced by egg-based systems. The US market has 99% switched to **Quadrivalent (QIV) vaccines** and new high dose (HD), recombinant/cell and adjuvanted formats. Latest analysis shows that global influenza vaccine demand is rising due to widening recommendations and the COVID-19 current pandemic. Commercially, this is an attractive growth area for manufacturers who continue to invest in new product filings, technologies and manufacturing capacity.

VacZine Analytics has recently conducted a new global analysis of the seasonal influenza market. **MarketVIEW: Seasonal influenza vaccines** is a research product composed of comprehensive MS Excel-based model (.xls) plus an Executive presentation (.pdf) which forecasts the potential commercial volume and value of seasonal influenza vaccines across 50 major Western and emerging or Rest of World (ROW) markets to 2035*. 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 with 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, adjuvanted and other forms where the impact of discounting/returns is explored. The analysis contains a detailed US forecast by product line and individual competitor including Seqirus' QIV (Flucelvax), MF-59 adjuvanted **FLUAD®** and the Sanofi HD (now QIV) portfolio (**Fluzone® + Flublok®**). An updated methodology is introduced to estimate the adoption of QIV products outside of the key US market looking at >10 ROW suppliers. Potential for new Sanofi differentiated products **Supemtek®** and **Efluelda®** entering the European market to challenge Seqirus is assessed. An updated analysis of the UK expanded program is included with a brand new demand by vaccine type analysis across the EU28 region. Key late stage R&D programs are also assessed for market entry along with the new mRNA threat that has clear implications for future product strategy. **MarketVIEW: Seasonal influenza vaccines** is the ultimate up-to-date guide for this significant vaccine marketplace.

For more information and references please visit our website or contact 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

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