

\*\*\*\*Published June 2020\*\*\*\*

## MarketVIEW: Norovirus vaccines (CAT: VAMV015)

<b>Product Name</b>	:	<b>MarketVIEW: Norovirus vaccines</b>
<b>Description</b>	:	Global commercial opportunity assessment
<b>Contents</b>	:	Executive presentation (~200 slides.pdf) + 2 x MS-Excel forecast model(s) (.xls)
<b>Therapeutic Area</b>	:	<b>Novel vaccines</b>
<b>Publication date</b>	:	June 2020
<b>Catalogue No</b>	:	VAMV015

## Background

**Noroviruses** (NoVs) called "Norwalk-like viruses" are a group of single-stranded positive sense RNA viruses and members of the family *Caliciviridae*. Noroviruses are transmitted from human-to-human (fecal-oral) and via food sources. They are one of the most highly infectious viruses known. In the community, NVs most commonly cause a self-limiting mild disease of short duration with gastrointestinal symptoms, usually resolving after 1 to 3 days. However, in infants, elderly and immunocompromised persons dehydration occur requiring medical attention and/or hospital admission for the administration of IV fluids.

Globally, norovirus is associated with approximately **one-fifth** of all **diarrhea** cases, with similar prevalence in both children and adults. It is the 2nd most common cause of death in children <5 yrs and the most common cause of diarrheal death in children >5 yrs with similar patterns across WHO regions. In developing countries, norovirus is estimated to cause over 200,000 deaths annually and around 700 million illnesses. NoV outbreaks are also a well-known issue in confined environments such as long-term care facilities, hospitals, military installations and commercial cruise ship liners. In these cases, the virus can cause severe disruption and economic loss. Because of the success of the rotavirus vaccine reducing disease burden, it is hoped a new norovirus vaccine can have a similar impact, now that the virus has taken a more prominent role. However, the SARS-CoV-2 pandemic (2020) will impact upon the norovirus vaccine timeframe and proposition. Two main programs operated by **Takeda Pharmaceuticals** and **Vaxart** were in clinical stages of testing and we await further status updates.

This **MarketVIEW** product is a comprehensive Executive presentation + MS Excel-based model(s), which forecasts the potential commercial value of Norovirus vaccines across 113 major Western and emerging markets and GAVI to 2035<sup>1</sup>. The model contains value (\$ m) and volume (mio doses) predictions along with launch timeframe, TPP, pricing and penetration estimates for all major market segments. There is a thorough review of global epidemiology, economic burden, competitive vaccine and landscape. Brand new model scenarios explore segment prioritization (post-COVID-19), vaccine duration of immunity and various new adjustments. This product is ideally suited to those organisations wanting an extended, up-to-date global forecast for this vaccine opportunity.

<sup>1</sup> USA, Canada, Australia, Japan, South Korea, Major 5 EU, Other EU1&2, BRIC-MT, other PAHO, GAVI

## Methodology

**VacZine Analytics** has closely monitored all significant source material pertaining to Norovirus 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 based-pathogens and diarrheal diseases have been used as a reference.

### PRODUCT CONTENTS:

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\*\*\*This product is a [summary presentation \(.pdf\)](#), [a forecast model \(.xls\)](#)

#### Contents – Summary presentation (.pdf)<sup>2</sup>

Contents

Author's notes

Executive summary

**[SECTION 1]** Norovirus vaccines: key commercial model outputs

**[SECTION 2]** Norovirus: virus and disease background

**[SECTION 3]** Norovirus: global epidemiology – outbreak and incidence data

**[SECTION 4]** Norovirus: US epidemiology – outbreak and incidence data

**[SECTION 5]** Norovirus: EU epidemiology – outbreak and incidence data

**[SECTION 6]** Norovirus: ROW epidemiology – outbreak and incidence data

**[SECTION 7]** Norovirus: Epidemiology – focus on pediatrics/hospitalization

**[SECTION 8]** Norovirus: Epidemiology – focus on elderly and “at risk”/hospitalization

**[SECTION 9]** Norovirus: Epidemiology – focus on other groups

**[SECTION 10]** Norovirus vaccines: background and rationale

**[SECTION 11]** Norovirus vaccines: R&D pipeline

**[SECTION 12]** Norovirus vaccines modelling commercial potential

Bibliography

About **VacZine Analytics**

Disclaimer



**SNAPSHOT**

**PAGES: ~200 slides** fully referenced/sourced. Available in .pdf form

**Contents – Vaccine demand models x 2 (MS Excel-based)**

**Worksheets = >70 interconnected**

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<sup>2</sup> Full contents i.e. title per slide is proprietary and only available upon valid request

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## BIBLIOGRAPHY

~214 References – only available upon valid 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 monoclonals and biologics.

For more information, please visit our website [www.vacZine-analytics.com](http://www.vacZine-analytics.com)

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