

****Published November 2020****

MarketVIEW: Seasonal influenza vaccines (CAT: VAMV036)

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| Product Name | : | MarketVIEW: Seasonal influenza vaccines |
| Description | : | Global vaccine commercial opportunity assessment |
| Contents | : | Executive presentation (~300 slides.pdf) + forecast model(s) (.xls) + MS-Excel Workbook |
| Therapeutic Area | : | Seasonal influenza vaccines |
| Publication date | : | Mid-November 2020 |
| Catalogue No | : | VAMV036 |

Background

Annual **seasonal 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 290,000 - 650,000 deaths (WHO figures). Annual influenza vaccination is the most effective method for preventing influenza virus infection and its complications, now more so during the **COVID-19 pandemic**. 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. Globally, many influenza vaccines are still of the trivalent inactivated format (TIV) although now the US market has 99% switched to **Quadrivalent (QIV) vaccines** with high dose (HD), cell and adjuvanted formats.

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 major individual Western¹ and 35 emerging or rest of world (ROW²) markets from 2014-2035. 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 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' 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 9 ROW suppliers and potential for new Sanofi differentiated products **Supemtek** and **Efluelda** entering the European market to challenge Seqirus. An updated

¹ USA, Canada, United Kingdom, France, Germany, Italy, Spain, Austria, Belgium, Greece, Netherlands, Poland and Sweden

² Argentina, Australia, Brazil, China, Hong Kong, India, Indonesia, Japan, Macau, Malaysia, Mexico, LATAM (LMI+UMI), Pakistan, Philippines, Russia, South Korea, Taiwan, Thailand, Turkey, Vietnam and New Zealand

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analysis of the UK expanded program is included with the hypothetical value of further childhood EU/ROW programs also assessed. Key late stage **R&D programs** are also assessed for market entry.

Methodology

VacZine Analytics has closely monitored all significant source material pertaining to seasonal influenza vaccines in each respective market. Source materials used are academic literature articles, government websites, medical bodies and associations, conference proceedings etc. Previously published research by **VacZine Analytics** in the field of viral respiratory pathogens has also been utilised.

PRODUCT CONTENTS:

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****This product is a [summary presentation \(.pdf\)](#), [an MS-forecast model \(.xls\)](#) and an information workbook(s) (.xls)³

Contents – Summary presentation (.pdf)⁴

Contents

Author's notes

Executive summary

[SECTION 1] Seasonal influenza vaccines: key commercial model outputs

[SECTION 2] Season influenza - burden of disease/review of global season 2019/20 – 2020/21

[SECTION 3] Review of US season 2019/20 – looking towards 2020/21

[SECTION 4] Review of UK & EU28 season 2019/20 – looking towards 2020/21

[SECTION 5] Review of latest UK & EU28 influenza vaccine recommendations 2020/21

[SECTION 6] UK & EU28 influenza vaccine coverage levels per target group

[SECTION 7] Review of EU28 supply, demand volumes and vaccine types across EU

[SECTION 8] Review of Southern Hemisphere: Australia and Brazil seasons 2019/20

[SECTION 9] Review of latest 2020/21 ROW influenza vaccine recommendations & uptake

[SECTION 10] Review of 2020/21 ROW supply and demand volumes

[SECTION 11] Update on major competitor activity 2019 – 20/21 and commercial forecasts

[SECTION 12] Review of key R&D programs and potential new threats/competitors

[SECTION 13] Modelling global potential demand/commercial value 2014-2035

References/bibliography

About **VacZine Analytics**

Disclaimer

SNAPSHOT

PAGES: ~300 slides fully referenced/sourced. Available in .pdf form

³ Influenza vaccine coverage rates per country per target group

⁴ Full contents i.e. title per slide is available upon request

Example 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, 2020
Pricing summary – TIV (all types)
Pricing summary – QIV (all types)
Pricing summary – LAIV
Pricing summary – Cell based vaccines
Pricing summary – Adjuvanted vaccines
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) – includes all target groups in this age category
Volume summary (> 65 yrs)
Private sector growth rates
Country 'build-up' 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
LATAM (LMI)
LATAM (UMI)
Pakistan



Continued.....

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/CAGRs)
Supplier's unit prices
QIV pricing trends
PAHO RF prices
EU doses used 2014-2015
EU doses used 2014-2017
UK per vaccine type
Country actual vol data (EU)
Country recommendations database ROW (2020)
Country actual vol data (ROW)
WHO schedules – influenza (pediatric and adult)
Population databases
% private
Risk groups
Back page

Worksheets = >120 interconnected



PRODUCT COST:

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*A region is North America, Europe or ROW

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BIBLIOGRAPHY

135 references – available upon request



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VacZine Analytics

A division of Assay Advantage Ltd
Warren (Carlton) House
Bells Hill
Bishops Stortford
Herts
CM23 2NN
United Kingdom
Tel: +44 (0) 1279 927049
E-mail: 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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