Commercial Prospects for Dengue Vaccines

Description:

Dengue vaccines have reached the late-phase clinical trials stage. The publisher has undertaken a robustly independent and realistic assessment of the commercial prospects of these vaccines. The publisher are not linked to or affiliated with any organisation with any interest in promoting dengue vaccines, whether commercial or not-for-profit; there were no conflicts of interest which could have affected our findings.

The report includes an examination of the clinical need for a vaccine (nature of disease, independent estimation of global incidence, identification and quantification of at-risk populations worldwide), an outline of the scientific / technological background (including key issues in dengue vaccine development), an assessment of the competitive environment, quantification and 2020 projections of total potential end-users of a dengue vaccine (namely, travellers from all developed economies to all regions of dengue transmission; private sector users in dengue transmission regions; and public sector users in dengue transmission regions), and 2020 revenue projections for a dengue vaccine, broken down by private sector sales in the developed world, private sector sales in the developing world, and public sector sales in the developing world.

This is the only publicly available report to produce possible revenue projections to 2020 for:

- a private sector dengue vaccine (travel vaccine) in the developed world
- a private sector dengue vaccine in the developing world
- a public sector dengue vaccine in the developing world.

The report includes a rigorous treatment of the dengue vaccine traveller market, based on an exclusive, proprietary and up-to-date model of international travel from each of over 20 developed countries to each of over 100 developing countries.

The report is timely in view of the widely expected pivotal Phase III trials of dengue vaccines and the number of early stage dengue vaccines in the clinic. Approval of a dengue vaccine:

- may have significant implications for the revenues of the vaccine developer, and
- may affect the scope and scale of M&A activity relating to owners of earlier stage vaccines.

The report will be of use to:

- Pharmaceutical executives in vaccine companies with an interest in the travel vaccine market
- Biotech companies involved in travel vaccine development
- Analysts seeking information and forecasts for travel vaccine revenues
- Fund managers that invest in vaccine companies
- Private equity firms or investment banks with an interest in M&A opportunities in the vaccine sector
- Donors, charities and NGOs with an interest in supporting or directing immunisation programmes in the developing world.

Key questions answered by the report:

- What is a reasonable estimate of the real incidence of dengue? (not just reported incidence)
- What is a reasonable estimate of the real (not publicly quoted) numbers of travellers from the developed world to regions of dengue transmission?
- What population segments in regions of dengue transmission might receive a vaccine?
- What might be the market penetration for a dengue vaccine in the private and public sectors in endemic regions?
- What might be the market penetration for a dengue vaccine designed for travellers from the developed to the developing world?
- What prices might dengue vaccines be sold at in the public sector (endemic regions) and private sector (developed and developing world)?
- What revenues might be achieved by a private sector vaccine (travel vaccine) in the developed world?
- What revenues might be achieved by a private sector vaccine in the developing world?
- What revenues might be achieved by a public sector vaccine in the developing world?
Key qualities of the report: this is the only publicly available report on dengue vaccines to:

- be free from any potential conflict of interest
- focus entirely on dengue vaccines
- analyse the real incidence of dengue by a ‘bottom-up’ methodology
- analyse the clinical need, scientific background, stakeholder networks and competitive landscape for dengue vaccines
- contain interviews with leading experts on dengue vaccines
- provide a rigorous treatment of the dengue vaccine traveller market, based on an exclusive, proprietary model of international travel from each of over 20 developed countries to each of over 100 developing countries.
- produce possible revenue projections to 2020 for:
  -- a private sector vaccine (travel vaccine) in the developed world
  -- a private sector vaccine in the developing world
  -- a public sector vaccine in the developing world.

Attention to the findings of this report may allow readers to avoid:

- Missing M&A opportunities in the vaccine sector
- Underestimating the scale and reach of dengue transmission
- Incorrectly estimating volumes of travel from the developed world to regions of dengue transmission
- Incorrectly estimating potential future revenues for developers of dengue vaccines.

This is the first report that estimates travel vaccine revenues by reference to a proprietary, bottom-up model of international travel that was produced by extensive correction, adjustment and manipulation of the most up-to-date, publicly available travel data. No other reports have access to this model.

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