R&D Trends: Influenza Vaccines - Commoditization Limits Opportunities in a Crowded Market

Description: In the last two post-pandemic years and with a number of seasonal influenza vaccines available, the race for novel influenza vaccine candidates has slowed somewhat. Pipeline candidates try to address further unmet needs, but novel technologies might struggle against the uncertainty regarding the next pandemic influenza strain and the increasing commoditization of the influenza markets.

Features and benefits

- Discussion of seasonal, pandemic and universal influenza vaccine pipelines
- Analysis of innovative new approaches in influenza vaccine development
- Discussion of clinical trial design and the target product profile (TPP) for influenza vaccines
- Analysis of future strategic opportunities and threats in a competitive influenza vaccine market

Highlights

- Novel products will further drive the commoditization of the influenza vaccine market and enhance the already fierce competition. It will also increase the pressure on innovative earlier-stage products such as DNA-based influenza vaccines which will have to show a clear benefit over existing products if they want to compete for market share.
- Datamonitor identified 22 compounds in the clinical seasonal influenza vaccine pipeline, with a diminishing number of later-stage products. With 28 candidates in development, the pandemic influenza vaccine pipeline is more robust. However, this also reflects the prevailing uncertainty about which strains are most likely to cause another pandemic.
- Pipeline influenza vaccines particularly try to address limitations associated with the amount of available vaccine, vaccine production timelines, strain coverage and vaccine efficacy. While a number of universal influenza vaccine candidates have reached clinical development, none has yet been able to progress beyond Phase II clinical trials.

Your key questions answered

- Get an overview of the pipelines for seasonal, pandemic and universal influenza vaccines
- Recognize development trends in influenza vaccines development and innovative earlier-stage approaches
- Understand opportunities and threats for influenza vaccine manufacturers and identify promising strategies to tackle future challenges

Contents:

Executive Summary
Strategic scoping and focus
Datamonitor key findings
Related reports
OVERVIEW
Catalyst
Summary
CLINICAL PIPELINE OVERVIEW
Novel influenza vaccine candidates have to address unmet needs if they want to be commercially attractive
- Adjuvants can enhance immunogenicity and allow "dose-sparing"
- Cell-culture techniques could allow faster and more flexible vaccine production
- Needle-free administration techniques could allow for faster and more convenient vaccination
- Moving on from the split/subunit design: next-generation influenza vaccines
- Novel live-attenuated vaccines promise better immunogenicity balanced with safe attenuation
Seasonal influenza vaccines
- A crowded market leads to a diminishing pipeline
- Quadrivalent vaccines are being developed to improve protection against influenza B virus
Pandemic influenza vaccines
Universal influenza vaccines

TARGET PRODUCT PROFILE

Fluzone (trivalent inactivated influenza vaccine; Sanofi Pasteur)

Tougher competition could lead to higher regulatory hurdles for the approval of influenza vaccines

CLINICAL TRIAL DESIGN IN INFLUENZA VACCINES

Preclinical trials

Clinical trials for influenza vaccines

US and EU guidelines offer guidance for the clinical development of influenza vaccines

Most clinical trials for new influenza vaccines rely on surrogate endpoints as markers of protection

Other endpoints: pre-licensure trials use surrogate endpoints to prove immunoprotection against influenza

Adjuvanted influenza vaccines require additional evidence

There are several opportunities to achieve accelerated regulatory approval for influenza vaccines

Comparison with marketed vaccines is the norm in influenza vaccine development

Future developments in clinical trial design

INNOVATIVE APPROACHES IN INFLUENZA VACCINE DEVELOPMENT

Recombinant protein vaccines

Virus-like particles, virosomes, and liposomes

Viral vector vaccines

DNA-based vaccines

THE FUTURE OF INFLUENZA VACCINES

Adjuvanted and cell-based vaccines will further drive the commoditization of the influenza market

The future of quadrivalent influenza vaccines largely depends on a positive cost-benefit profile

Vaccines based on novel technologies face a highly commoditized and competitive market

Universal influenza vaccines are theoretically attractive but still far from reaching the market

BIBLIOGRAPHY

Journal papers

Websites

APPENDIX

Contributing experts

Conferences attended

Report methodology

Ordering:

Order Online - http://www.researchandmarkets.com/reports/1871968/

Order by Fax - using the form below

Order by Post - print the order form below and send to

Research and Markets,
Guinness Centre,
Taylors Lane,
Dublin 8,
Ireland.
Fax Order Form
To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit http://www.researchandmarkets.com/contact/

Order Information
Please verify that the product information is correct and select the format(s) you require.

Product Name: R&D Trends: Influenza Vaccines - Commodityization Limits Opportunities in a Crowded Market
Web Address: http://www.researchandmarkets.com/reports/1871968/
Office Code: SCD2UVVP

Product Formats
Please select the product formats and quantity you require:

<table>
<thead>
<tr>
<th>Quantity</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Hard Copy</td>
<td>☐ USD 495 + USD 57 Shipping/Handling</td>
</tr>
<tr>
<td>Electronic (PDF) Single User</td>
<td>☐ USD 395</td>
</tr>
<tr>
<td>Electronic (PDF) Enterprise Wide</td>
<td>☐ USD 988</td>
</tr>
</tbody>
</table>

* Shipping/Handling is only charged once per order.

Contact Information
Please enter all the information below in BLOCK CAPITALS

Title: [ ] Mr [ ] Mrs [ ] Dr [ ] Miss [ ] Ms [ ] Prof
First Name: ___________________________ Last Name: ___________________________
Email Address: * ___________________________
Job Title: ___________________________
Organisation: ___________________________
Address: ___________________________
City: ___________________________
Postal / Zip Code: ___________________________
Country: ___________________________
Phone Number: ___________________________
Fax Number: ___________________________

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)
Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

☐ Pay by credit card: You will receive an email with a link to a secure webpage to enter your credit card details.

☐ Pay by check: Please post the check, accompanied by this form, to:
Research and Markets,
Guinness Center,
Taylors Lane,
Dublin 8,
Ireland.

☐ Pay by wire transfer: Please transfer funds to:

<table>
<thead>
<tr>
<th>Account number</th>
<th>833 130 83</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sort code</td>
<td>98-53-30</td>
</tr>
<tr>
<td>Swift code</td>
<td>ULSBIE2D</td>
</tr>
<tr>
<td>IBAN number</td>
<td>IE78ULSB98533083313083</td>
</tr>
<tr>
<td>Bank Address</td>
<td>Ulster Bank, 27-35 Main Street, Blackrock, Co. Dublin, Ireland.</td>
</tr>
</tbody>
</table>

If you have a Marketing Code please enter it below:

Marketing Code: _________________________

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at http://www.researchandmarkets.com/info/terms.asp

Please fax this form to:
(646) 607-1907 or (646) 964-6609 - From USA
+353-1-481-1716 or +353-1-653-1571 - From Rest of World