PharmaPoint: Prophylactic Hepatitis B Virus Vaccines - 5EU Drug Forecast and Market Analysis to 2022

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Summary

Hepatitis B, which is caused by the hepatitis B virus (HBV), is characterized by acute or chronic inflammation of the liver. Researchers and healthcare experts have estimated that roughly two billion people are infected with HBV worldwide, with roughly 600,000 people dying each year from HBV-related liver diseases. While the arrival of recombinant HBsAg vaccines has greatly reduced disease burden over the past two decades, questions surrounding vaccine uptake and effectiveness in adults, particularly in niche patient populations, still remain. GlobalData expects that the growing popularity of pediatric combination vaccines, along with the arrival of vaccines that achieve higher seroconversion rates in high-risk adults, will serve to stimulate growth in the marketplace over the forecast period. Country-specific immunization recommendations and policy implementation will be an essential metric for determining future vaccine uptake in the 7MM (US, France, Germany, Italy, Spain, UK, and Japan) and Canada.

Our primary and secondary research has revealed that the reimbursement of Infanrix Hexa, which began in 2008, has helped France's routine HBV immunization program recover from safety concerns (CTV, 2012; Denis et al., 2013). The adult HBV vaccine market in Germany is also expected to grow during the forecast period, led by the arrival of Dynavax Technologies' Heplisav in the second half of 2018. GSK dominated Italy's HBV vaccine market in 2012. Sanofi Pasteur MSD's monovalent vaccine, HBVaxPro, accounted for the remaining market share. More specifically, GlobalData expects the arrival of Sanofi Pasteur MSD's Hexyon to be the principal driver of Spain's market growth, as it should compete with Infanrix Hexa for market share in the routine immunization program. Our primary research has revealed that challenging barriers to growth, such as poor funding mechanisms due to government spending concerns, inadequate physician education, and low patient awareness, will limit adult vaccine uptake and growth of this segment of the market in the UK.

Scope

- Overview of Hepatitis B disease including epidemiology, etiology, symptoms, diagnosis, pathology and treatment guidelines as well as an overview on the competitive landscape.
- Detailed information on the key drugs in 5EU including product description, safety and efficacy profiles as well as a SWOT analysis.
- Sales forecast for the top drugs in 5EU from 2012-2022.
- Analysis of the impact of key events as well the drivers and restraints affecting the 5EU Hepatitis B disease market.

Reasons to buy

- Understand and capitalize by identifying products that are most likely to ensure a robust return
- Stay ahead of the competition by understanding the changing competitive landscape for Hepatitis B disease
- Effectively plan your M&A and partnership strategies by identifying drugs with the most promising sales potential
- Make more informed business decisions from insightful and in-depth analysis of drug performance
- Obtain sales forecast for drugs from 2012-2022 in 5EU

Contents:

1 Table of Contents
1 Table of Contents
1.1 List of Tables
1.2 List of Figures
2 Introduction
2.1 Catalyst
2.2 Related Reports
2.3 Upcoming Related Reports
3 Disease Overview
3.1 Overview
3.2 Etiology and Pathophysiology
3.2.1 Etiology
3.2.2 Pathophysiology
3.3 Symptoms
3.4 Prognosis
4 Vaccination Recommendations and Coverage Rates
4.1 Overview
4.2 France
4.2.1 Immunization Recommendations and Policies
4.2.2 Vaccination Coverage
4.2.3 Clinical Practice
4.3 Germany
4.3.1 Immunization Recommendations and Policies
4.3.2 Vaccination Coverage
4.3.3 Clinical Practice
4.4 Italy
4.4.1 Immunization Recommendations and Policies
4.4.2 Vaccination Coverage
4.4.3 Clinical Practice
4.5 Spain
4.5.1 Immunization Recommendations and Policies
4.5.2 Vaccination Coverage
4.5.3 Clinical Practice
4.6 UK
4.6.1 Immunization Recommendations and Policies
4.6.2 Vaccination Coverage
4.6.3 Clinical Practice
5 Competitive Assessment
5.1 Overview
5.2 Strategic Competitor Assessment
5.3 Product Profiles - Monovalent Vaccines
5.3.1 Engerix-B
5.3.2 Recombivax HB
5.3.3 Fendrix
5.4 Product Profiles - Combination Vaccines
5.4.1 Infanrix Hexa
5.4.2 Hexyon
5.4.3 Twinrix
5.4.4 Ambirix
6 Opportunity and Unmet Need
6.1 Overview
6.2 Increased Vaccine Immunogenicity
6.2.1 Unmet Need
6.2.2 Gap Analysis
6.2.3 Opportunity
6.3 Increased Vaccination Coverage Rates
6.3.1 Unmet Need
6.3.2 Gap Analysis
6.3.3 Opportunity
6.4 Increased Patient Awareness
6.4.1 Unmet Need
6.4.2 Gap Analysis
6.4.3 Opportunity
6.5 Improved Physician Education
6.5.1 Unmet Need
6.5.2 Gap Analysis
6.5.3 Opportunity
6.6 More Cost-Effective Vaccines
6.6.1 Unmet Need
Table 9: Immunogenicity Profile - Engerix-B
Table 10: Safety Profile - Engerix-B
Table 11: Engerix-B SWOT Analysis, 2014
Table 12: Product Profile - Recombivax HB
Table 13: Immunogenicity Profile - Recombivax HB
Table 14: Safety Profile - Recombivax HB
Table 15: Recombivax HB SWOT Analysis, 2014
Table 16: Product Profile - Fendrix
Table 17: Immunogenicity Profile - Fendrix
Table 18: Safety Profile - Fendrix
Table 19: Fendrix SWOT Analysis, 2014
Table 20: Product Profile - Hexyon
Table 21: Immunogenicity Profile - Hexyon
Table 22: Safety Profile - Hexyon
Table 23: Hexyon SWOT Analysis, 2014
Table 24: Product Profile - Ambirix
Table 25: Immunogenicity Profile - Ambirix
Table 26: Safety Profile - Ambirix
Table 27: Ambirix SWOT Analysis, 2014
Table 28: Unmet Need and Opportunity in Prophylactic HBV Vaccines
Table 29: HBV Vaccines - Phase Pipeline, 2014
Table 30: Comparison of Vaccines in Development for HBV, 2014
Table 31: Product Profile - Heplisav
Table 32: Immunogenicity Profile - Heplisav
Table 33: Safety Profile - Heplisav
Table 34: Heplisav SWOT Analysis, 2014
Table 35: Sales Forecasts ($m) for HBV Vaccines in France, 2012-2022
Table 36: Key Events Impacting Sales for HBV Vaccines in France, 2014
Table 37: France HBV Vaccine Market - Drivers and Barriers, 2014
Table 38: Sales Forecasts ($m) for HBV Vaccines in Germany, 2012-2022
Table 39: Key Events Impacting Sales for HBV Vaccines in Germany, 2014
Table 40: Germany HBV Vaccine Market - Drivers and Barriers, 2014
Table 41: Sales Forecasts ($m) for HBV Vaccines in Italy, 2012-2022
Table 42: Key Events Impacting Sales for HBV Vaccines in Italy, 2014
Table 43: Italy HBV Vaccine Market - Drivers and Barriers, 2014
Table 44: Sales Forecasts ($m) for HBV Vaccines in Spain, 2012-2022
Table 45: Key Events Impacting Sales for HBV Vaccines in Spain, 2014
Table 46: Spain HBV Vaccine Market - Drivers and Barriers, 2014
Table 47: Sales Forecasts ($m) for HBV Vaccines in the United Kingdom, 2012-2022
Table 48: Key Events Impacting Sales for HBV Vaccines in the United Kingdom, 2014
Table 49: United Kingdom HBV Vaccine Market - Drivers and Barriers, 2014
Table 50: Patient Population(s) Targeted for HBV Vaccination in the Pediatric Market, by Country
Table 51: Patient Population(s) Targeted for HBV Vaccination in the Adult Market, by Country
Table 52: Key Launch Dates
Table 53: High-Prescribing Physicians (non-KOLs) Surveyed, by Country

1.2 List of Figures
Figure 1: HBV Structure and the Recombinant Vaccine Development Process
Figure 2: Routine HBV Vaccination Coverage (%) in France
Figure 3: High-Prescriber Estimation of Pediatric HBV Vaccine Patient Share in France, 2014
Figure 4: Routine HBV Vaccination Coverage (%) in Germany
Figure 5: High-Prescriber Estimation of Pediatric HBV Vaccine Patient Share in Germany, 2014
Figure 6: Routine HBV Vaccination Coverage (%) in Italy
Figure 7: High-Prescriber Estimation of Pediatric HBV Patient Share in Italy, 2014
Figure 8: Routine HBV Vaccination Coverage (%) in Spain
Figure 9: High-Prescriber Estimation of Pediatric HBV Vaccine Patient Share in Spain, 2014
Figure 10: High-Prescriber Estimation of Pediatric HBV Vaccine Patient Share in the United Kingdom, 2014
Figure 11: Competitive Assessment of Late-Stage Pipeline Agents and Marketed Products in HBV Vaccines, 2012-2022
Figure 12: Sales for HBV Vaccines in France, 2012-2022
Figure 13: Sales for HBV Vaccines in Germany, 2012-2022
Figure 14: Sales for HBV Vaccines in Italy, 2012-2022
Figure 15: Sales for HBV Vaccines in Spain, 2012-2022
Figure 16: Sales for HBV Vaccines in the United Kingdom, 2012-2022

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