OpportunityAnalyzer: Dengue Vaccines - Opportunity Analysis and Forecasts to 2020

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Summary

Dengue is a febrile illness caused by the dengue virus (DENV), a single-stranded flavivirus most commonly transmitted by the Aedes aegypti (A. aegypti) mosquito. Thought to be responsible for upwards of 100 million infections each year, DENV is the most prevalent arthropod-borne virus in the world. Individuals infected with DENV can present with a wide spectrum of symptoms, including fevers, retro-orbital pain, severe headache, muscle and joint pain, and rash. The severity of dengue fever ranges from asymptomatic cases, to classic dengue fever, and to dengue hemorrhagic fever (DHF) or dengue shock syndrome (DSS) that have a mortality rate of 5%-15%. Because there are no marketed dengue-specific vaccines or therapeutics, current treatment strategies are limited to supportive care for those already infected with the virus, and vector control to reduce DENV transmission. The near-universal failure of these measures to curb transmission and reduce disease burden across the global marketplace - which for the purposes of this report is comprised of Brazil, India, Mexico, Singapore, and Thailand - has further enhanced the need for safe and effective vaccines. GlobalData expects the launch of the first dengue vaccines, led by Sanofi Pasteur's CYD-TDV and Takeda's DENVax, to revolutionize the treatment and prevention paradigm.

Highlights

Key Questions Answered

- Based on interviews with key opinion leaders (KOLs), GlobalData has identified the major unmet needs in the dengue vaccine marketplace. Will the leading pipeline agents fulfill these unmet needs during the forecast period (2015-2020)?
- What research and development (R&D) strategies will companies leverage to compete in the future dengue vaccine marketplace?
- Which patient population(s) are most likely to be targeted for routine immunization?
- What clinical and environmental factors are likely to influence dengue vaccine uptake in Brazil, India, Mexico, Singapore, and Thailand? Which of these markets will experience the strongest growth from 2015-2020?

Key Findings

- GlobalData projects the dengue vaccine market in Brazil, India, Mexico, Singapore, and Thailand to grow from $69.6m in 2015 to $398.6m in 2020, at a compound annual growth rate (CAGR) of 41.8%. This rapid growth will be due to the expected incorporation of newly-launched dengue vaccines into routine immunization programs.
- KOLs interviewed by GlobalData expect the live-attenuated dengue vaccines - led by Sanofi Pasteur's CTD-TDV and Takeda's DENVax - to dominate the marketplace for the duration of the forecast period.
- GlobalData anticipates that firms will increasingly turn to innovative R&D strategies, in particular the exploration of alternative approaches to early-stage clinical trial design - such as the dengue human infection model (DHIM) - in order to increase developmental efficiency, minimize upfront risk, and gain a competitive advantage over rivals.
- Domestically-supplied vaccines, most notably Butantan Institute's TV-003 in Brazil and Panacea Biotech's/Biological E's TV-003 in India, are projected to limit market growth due to their low price relative to vaccines produced by privately-held foreign companies.

Scope

- Overview of dengue virus (DENV), including epidemiology, etiology, pathophysiology, symptoms, diagnosis, and current disease surveillance and prevention measures.
- Topline dengue vaccine market revenue from 2015-2020. Annual cost of therapy (ACOT) and major pipeline vaccine sales in this forecast period are included.
Key topics covered include strategic competitor assessment, market characterization, unmet needs, R&D strategies, and clinical trial design for the dengue vaccine market.

Pipeline analysis: comprehensive data split across different phases, emerging novel trends under development, synopses of innovative early-stage projects, and detailed analysis of late-stage pipeline vaccines. An interactive clinical and commercial analyzer tool is available.

Analysis of the current and future market competition in the global dengue vaccine market. Insightful review of the key industry drivers, restraints and challenges. Each trend is independently researched to provide qualitative analysis of its implications.

Reasons to buy

- Develop and design your in-licensing and out-licensing strategies through a review of pipeline products and technologies, and by identifying the companies with the most robust pipeline.
- Develop business strategies by understanding the trends shaping and driving the global dengue vaccine market.
- Drive revenues by understanding the key trends, innovative products and technologies, market segments, and companies likely to impact the dengue vaccine market in the future.
- Formulate effective sales and marketing strategies by understanding the competitive landscape and by analysing the performance of various competitors.
- Identify emerging players with potentially strong product portfolios and create effective counter-strategies to gain a competitive advantage.
- Organize your sales and marketing efforts by identifying the market categories and segments that present maximum opportunities for consolidations, investments and strategic partnerships.

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