PharmaPoint: Meningococcal Vaccines - Global Drug Forecast and Market Analysis to 2022

Summary

Meningococcal disease is an acute infection caused by the bacterium Neisseria meningitidis, an aerobic, gram-negative diplococcal microbe that is only pathogenic in humans. Different N. meningitides strains are typically classified into serotypes based on the structure of the polysaccharide capsule surrounding the outer membrane, with five serotypes (A, B, C, W-135, and Y) being responsible for the majority of invasive infections. The meningococci are spread primarily by the exchange of bodily fluids (i.e. saliva) and enter the body by attaching to the epithelial cells of the nasopharynx. Upon adhesion, the bacteria then begin to proliferate and form micro-colonies on the surface of the epithelial cells. Symptoms of systemic infection develop rapidly and include flu-like symptoms (headache, fever, sore throat, nausea, and vomiting), sensitivity to light, and a stiff neck. If left untreated, meningococcal disease progresses rapidly and is often fatal, and a significant population of survivors (10-20%) are left with complications such as loss of a limb, deafness, epilepsy, and mental retardation. Due to the rapid onset and severity of symptoms, vaccination remains the preferred approach to meningococcal disease management and prevention. Currently available vaccines protect against all serotypes A, B, C, W-135, and Y and utilize the polysaccharide as antigens although no single vaccine can protect against all serogroups simultaneously. GlobalData expects growth in the meningococcal vaccines market to be driven by the recent launch of serotype B vaccines, which address a critical unmet need in the treatment landscape, and an increase in the coverage rates of existing routine vaccination programs.

Highlights

Key Questions Answered

- Based on interviews with key opinion leaders (KOLs), GlobalData has identified the major unmet needs in the meningococcal vaccine marketplace.
- What will be the effect of recent acquisitions be on the meningococcal vaccine marketplace?
- How will the new first-in-class-vaccines against serogroup B be received in the different markets?
- What research and development (R&D) strategies will companies leverage to compete in the future meningococcal vaccine marketplace?
- Which patient population(s) are most likely to be targeted for vaccines against serogroup B?

Key Findings

- GlobalData projects the meningococcal vaccine market in the US, 5EU, Brazil and Australia to grow from approximately $1.1bn in 2012 to $1.5bn in 2022, at a compound annual growth rate (CAGR) of 3.0%. This growth across the 8MM will primarily be driven by the 5EU due to implementation of serogroup B vaccines in the routine infant vaccination schedule. Further growth will be the result of adolescents, including college students, in US receiving the newly approved vaccines against serogroup B while the commercial meningococcal vaccine market in Brazil will experience a decline at a negative CAGR of 16.3%.
- With full implementation of serogroup B vaccines only realized in the UK, the routine application of these vaccines is seen as the major unmet need to be addressed in the oncoming years.
- GlobalData anticipates that opportunities will center on the improvement of vaccine efficacy, in particular in the emerging field of vaccines against serogroup B whilst addressing the cost effectiveness concerns voiced by various governmental institutions.

Scope

- Overview of meningococcal disease, including epidemiology, etiology, pathophysiology, regional serogroup distribution as well current meningococcal vaccine recommendation of all 8MM covered.
- Topline meningococcal vaccine market revenue from 2012-2022. Recent acquisitions, approvals and governmental recommendations are included in the forecast model.
- Key topics covered include strategic competitor assessment, market characterization, unmet needs, R&D strategies, and clinical trial design for the meningococcal vaccine market.
- Pipeline analysis: comprehensive data split across different phases, emerging novel trends under development, synopses of innovative early-stage projects, and analysis of late-stage pipeline products. An interactive clinical and commercial analyzer tool is available.
- Analysis of the current and future market competition in the global meningococcal 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

The report will enable you to -
- 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 genital herpes market.
- Drive revenues by understanding the key trends, innovative products and technologies, market segments, and companies likely to impact the genital herpes market in the future.
- Formulate effective sales and marketing strategies by understanding the competitive landscape and by analyzing 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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