



VacZine Analytics®

Bringing life to vaccine strategy...

VaccineSTATS™

Now on-line

Vaccine Pipeline/IP Review

November 2010

What is the Vaccine Pipeline Review?

Vaccine R&D Pipeline Review (CAT No: VAVS016), updated November 2010

Vaccine R&D pipeline/IP review is a comprehensive database which allows effective monitoring of the fast moving vaccine R&D pipeline. The database contains around 450 validated entries of active commercial vaccine programs (prophylactic) covering over 80 companies. It can be used for competitive intelligence, business development and strategic planning activities.

*******NEW FOR November 2010*******

Clients can now register for free on-line "standard" database or sign up to "premium" version with added features/functionality.

Please visit www.vaccinestats.com or register at register@vaccinestats.com

Key features and benefits - Vaccine Pipeline Review[#]

- ④ 450 vaccine trial entries in validated commercial pipeline database segmented by:
 - Development companies (>80)
 - Partners
 - Pathogen/condition
 - Most advanced Phase (EU + US) – preclinical to registration
 - Predicted MAA and BLA filing
 - Trial enrollment number
 - Target market segment analysis - “Novel” versus “existing” versus “global initiative”
 - Program adjuvant – novel (description), alum, unknown, none
 - Vaccine antigen type – LAIV, recombinant, killed
 - Route of administration – ID, SC, IM, IN
 - Clinical trial link, start date, history and comments

- ④ Semi annual updates*, fully interactive dataset
- ④ Executive summary presentation including:
 - Full pipeline analytics e.g. Graphs/tables/opportunity heatmaps
 - Top 5 company sales/franchise data **2003-2009**, historical growth (CAGR)

Comparing databases

Database product	Standard version	Premium version
Registration >>	Free registration	\$399.99 per update*
Database feature [?]		
Company [?]	YES	YES
Partner [?]	YES	YES
Pathogen/condition [?]	YES	YES
Target market [?]	YES	YES
Intervention [?]	NO	YES
Route [?]	NO	YES
Antigen type [?]	NO	YES
Adjuvant [?]	NO	YES
Preclinical programs?[?]	NO	YES
Phase [?]	YES	YES
Phase (US) [?]	NO	YES
Phase (EU) [?]	NO	YES
Phase (ROW) [?]	NO	YES
Start date [?]	NO	YES
Trial title [?]	NO	YES
Enrollment No [?]	NO	YES
Trial link [?]	NO	YES
History [?]	NO	YES
EXPORTABLE DATA[?]	NO	YES
SUMMARY PRESENTATION[?]	NO	YES

Database screenshot*

VacZine Analytics® Bringing life to vaccine strategy...

Logged on as ransav | Log out | Advanced search | Export results | Printer-friendly version | Print all pages | Language: English

Premium Version

Export selected | Print selected

Search for: Any field | Contains | Search | Show all | Details found: 1577 | Page 1 of 79 | Records Per Page: 20

ID	Status	Company	Partner	Pathogen/Condition	Market	Intervention	Route	Antigen Type	Adjuvant	Most advanced phase	Phase (US)	Phase (EU)	Phase Non-EU/US	Clinical trial start date	Clinical Trial Title	Enrolment	ClinicalTrials
View <input type="checkbox"/>	1	Absynth		Staphylococcus aureus	Nosocomial		N/A	Unknown	N/A	Active preclinical	Preclinical	Preclinical					
View <input type="checkbox"/>	2	ACE BioSciences	Statens Serum Institute	Streptococcus pneumoniae	Infant/Booster	Protein based vaccine	N/A	Recomb	N/A	Active preclinical	Preclinical	Preclinical					
View <input type="checkbox"/>	3	NEW ACE BioSciences		Clostridium difficile	Nosocomial	ACE-820	N/A	Unknown	N/A	Active preclinical	Preclinical	Preclinical					
View <input type="checkbox"/>	4	NEW ACE BioSciences		Moraxella catarrhalis	Novel	ACE-810	N/A	Unknown	N/A	Active preclinical	Preclinical	Preclinical					
View <input type="checkbox"/>	5	ACE BioSciences		Traveler's diarrhea	Travel/Endemic	ACE-920 (Campylobacter and ETEC)	N/A	Unknown	N/A	Active preclinical	Preclinical	Preclinical					
View <input type="checkbox"/>	6	NEW ACE BioSciences	NMRC	Traveler's diarrhea	Travel/Endemic	ACE-393 (Campylobacter Jejuni)	Oral	Recomb	Unknown	Phase II	Phase II		01/10/2008	ACE393-103 Vaccination Challenge Study	72	http://ClinicalTrials.gov	
View <input type="checkbox"/>	7	NEW ACE BioSciences	PATH	Traveler's diarrhea	Travel/Endemic	ACE-527 "HoloVax" (ETEC)	Oral	LAIV	Unknown	Phase I	Phase I		01/08/2009	ACES27 Safety and Immunogenicity Study	36	http://ClinicalTrials.gov	
View <input type="checkbox"/>	8	Aeras		Tuberculosis	Global initiative	AERAS-405	N/A	Recomb	N/A	Active preclinical	Preclinical	Preclinical					
View <input type="checkbox"/>	9	Aeras		Tuberculosis	Global initiative	AERAS-407 (rBCG)	N/A	Recomb	N/A	Active preclinical	Preclinical	Preclinical					
View <input type="checkbox"/>	10	NEW Aeras	Univ. of Oxford/Emergent BioSolutions	Tuberculosis	Global initiative	AERAS-485/MVA85A	ID	LAIV	None	Phase II		Phase II (South Africa)	01/04/2009			2784	

*Version shown is "premium" database

Executive Summary Presentation contents

Current vaccine pipeline

R&D programs by phase/market (all companies)

R&D programs by company (top 6)

Impact of H1N1 programs on R&D pipeline

Corporate changes

Discontinued/suspended projects

Paediatric vaccines

Human Papillomavirus (HPV)

Neisseria meningitidis

Streptococcus pneumoniae

Novel vaccines

Travel/Endemic

Influenza (Seasonal)

Influenza (H1N1)

Vaccine Adjuvants by Phase (clinical and launched products)

Vaccines by route (clinical and launched products)

Vaccines by antigen type (clinical and launched products)

Pathogen by most advanced stage of vaccine development

Licensing Opportunities

Vaccine market heatmaps

Vaccine historical sales 2003 - 2008

Methodology

About VacZine Analytics

Disclaimer



Why buy the premium database product?

1. The premium database contains more detailed fields including various parameters for commercial analysis
2. “Active” or “possible active” preclinical programs are included
3. Vaccine patents per pathogen are included along with opportunity heatmaps
4. Executive summary presentation – provides added value analysis to user
5. Data is fully exportable into MS Excel, Word – user friendly interface
6. E-mail support provided to user

Methodology

Pipeline Review

Information was sourced from Company annual reports, press releases, and presentations; Clinicaltrials.gov and the WHO. The project focused on products in development for the European and US markets. Coverage in other countries should not be considered fully comprehensive. Preclinical programs are included although these are only indicative of current early stage activity as disclosure varies considerably by company. Therapeutic vaccines for non-infectious diseases are not covered. BLA and MAA submissions were calculated based on an analysis of the phase I, phase II and Phase III clinical development times of 300 vaccine projects listed in clinicaltrials.gov. Timings were validated through analysis of company annual reports, press releases, and presentations. The target age range for programs was derived from clinical trial recruitment data listed in Clinicaltrials.gov. Age ranges shown are approximate. This database includes relevant records added or updated in clinicaltrials.gov from 19 September 2008 to 25 July 2009. Company websites, including press releases and presentations, were checked from 27-31 July 2009. Clinical trials not yet open for recruitment as of July 2009 are assumed to start enrollment in August 2009.

Intellectual Property Review

A search of PatentScope (WIPO) and The US Patent and Trademark Office (PTO) Issued Patents and Published Applications databases identified vaccine related patents published by commercial organizations from 31 October 2008 to 24 July 2009. Only patents filed after 1 January 2006 were examined. Patents claimed by individuals, academic institutions, governmental agencies, and other public and private research institutions (non-commercial patents) were excluded except for joint applications and/or partnerships/technology transfers. Novel technology and formulations (such as adjuvants) patents were excluded. Patents for Diphtheria, Pertussis, Tetanus, Mumps, Measles, Rubella, Varicella, Rotavirus, Hepatitis A/B prophylactic and Herpes zoster virus vaccines were not included. A pathogen was assigned to a patent following examination of the patent Title or Abstract and/or the preferred vaccine candidate named in the patent Claims (note: a patent may claim several pathogens, hence may appear several times in the database). In the case where a company has several patents for a particular pathogen, only the most recently published patent was included. For each company, patents were assigned as either "Active preclinical" or "Possible preclinical" following cross-referencing with current preclinical activity obtained from annual reports, press releases, and presentations. Possible preclinical = IP assets but no disclosed project Active preclinical = IP assets and disclosed project OR no IP assets and disclosed project Companies may have active preclinical programs without identifiable IP assets. For example, a project may be at a very early research stage; the company may have licensed IP from an undisclosed third party or a patent may be pending. The database provides a landscape of current IP activity for strategic analysis. It does not constitute a resource to determine the patentability of an invention nor should it be used to conduct novelty, infringement or validity investigations. The analysis does not cover vaccines developed by: 1. Beijing Tiantan Biological Products 2. Changchun Institute of Biological Products 3. Chengdu Institute of Biological Products 4. China Biopharma Inc 5. Lanzhou Institute of Biological Products 6. Sinovac Kexing Bioproducts (aka Sinovac Biotech Ltd) 7. Shanghai Institute of Biological Products 8. Wuhan Institute of Biological Products 9. Zhejiang Tianyuan Bio-pharmaceutical Co Ltd 10. Finlay Instituto, Cuba <http://www.finlay.sld.cu/>

Abbreviations

SC= Subcutaneous administration; **Conj**= conjugated polysaccharide/toxoid; **IM**= intramuscular administration **LAIV**= Live attenuated inactivated virus; **IN**= Intranasal administration; **PS**= Polysaccharide only; **ID**= intradermal administration; **Recomb**= Recombinant/Subunit/Protein fusion/Virosomes/VLP; **Inj**= IM, SC, ID; **Killed**= killed/inactivated virus; **Multiple**= Combinations have multiple antigen type; **DNA**= DNA vaccine/plasmid

How to order

To order please contact your region account manager or order direct at orders@vaczine-analytics.com
This database can also be purchased on-line. Please review the **TERMS and CONDITIONS** of purchase.
Please visit: www.vaczine-analytics.com or www.vaccinestats.com

VacZine Analytics will grant a [enter region] license to [enter client name], for the price of:

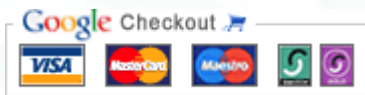
USD \$399.99/ GBP £250.00*

*For one username/password per individual per database version. Database in terms of vaccine R&D program Phase/Status is updated every six months. Other database fields may be updated on a continuous basis.

Clients can register for a free on-line version that has limited features please e-mail at register@vaccinestats.com

For orders in the UK, VAT at 15% will be added to final invoice total

VacZine Analytics (R) is a trading division of Assay Advantage Ltd, UK Company Number: 5807728
VacZine Analytics (R) and the “**spiral logo**” are UK Registered Trademarks, 2009



Disclaimer

All rights reserved

This licensed product (or part thereof) may not be reproduced, stored in a retrieval system or transmitted in any form without the written permission of the publisher VacZine Analytics (a division of Assay Advantage Ltd).

The facts presented within this document, at the time of its production, were believed to be correct and were gathered in good faith from both primary and secondary sources. VacZine Analytics is not always in the position to assure that the facts are guaranteed. VacZine Analytics cannot be held liable for any actions based upon facts or recommendations presented within this document.

About VacZine Analytics:

VacZine Analytics is an established research consultancy based in the United Kingdom. Its aim is to provide high-quality disease and commercial analysis to those working within or in collaboration with the vaccine industry.

With our product lines:

- DiseaseINFOPACK
- OpportunitySCAN
- MarketVIEW
- ExpertREACT
- VaccineSTATS

Our key focus is helping clients to build the case for developing new vaccines.



VacZine Analytics

Bringing life to vaccine strategy...

www.vacZine-analytics.com

Warren House

Bells Hill

Bishops Stortford

Herts

CM23 2NN

United Kingdom

Tel. +44 (0) 1279 654514

e-mail: info@vacZine-analytics.com

© VacZine Analytics, 2009. All rights reserved.