

## **Human Papillomavirus - Vaccines, Then Antivirals? - Update on HPV, including current treatment options, the developmental vaccines and anti-viral therapies, with an overview of current market and future forecasts**

**Product Code: bfhc0643**

**Price: \$1900**

**Publication Date: 28-Jan-2004**

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### **Overview**

#### **Introduction**

Over 100 types of HPV, causing a variety of diseases, have been identified. Treatment options are limited, with no known cure currently available. However, the causal link between HPV and cervical cancer has prompted development of prophylactic vaccines, aimed at reducing the incidence, and eventually the prevalence, of this widespread disease and, by association, cervical cancer

#### **Scope**

- Provides an overview of the different strains and types of HPV infection, including detailed etiology and epidemiology
- Outlines the current treatment algorithms and options available and assesses the key unmet needs in HPV treatment
- Evaluates the various developmental treatment options, in particular the two Phase III prophylactic vaccines from Merck & GSK
- Detailed analysis and forecasts of the potential patient population and peak sales of each product, assuming a number of different scenarios

#### **Highlights**

HPV is the most commonly diagnosed viral sexually transmitted disease in the US and UK, with conservative annual incidence estimates of 5.5 million in the US alone. Of these infections, it is believed that 50-75% are with high-risk HPV types, leading to approximately 500,000 new cases of cervical cancer and 232,000 deaths worldwide each year.

Depending on which patient populations are targeted, Datamonitor believes that immunization could represent a potential market of \$1-3 billion (at peak). This will be heavily influenced by optimum positioning e.g. oncogenic or STD product and official recommendation in the US.

Datamonitor believes that beyond a prophylactic there is also sufficient need for an efficacious, simple targeted HPV therapeutic (either antiviral or biological). Based on current epidemiology and pricing benchmarks this product type could generate annual sales of \$1.4 billion in the seven major markets.

#### **Reasons to Purchase**

- Analyze the commercial viability of the HPV treatment and prophylaxis market, based on estimated patient numbers
- Develop appropriate market entry and consolidation strategies through an understanding of key unmet needs
- Understand the significance of the extent of the problem of HPV infection and the associated healthcare costs

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<b>ABOUT DATAMONITOR HEALTHCARE</b>	2
<b>About the Infectious Disease pharmaceutical analysis team</b>	2
<b>EXECUTIVE SUMMARY</b>	7
<b>Introduction</b>	7
<b>Scope and coverage of the Brief</b>	7
<b>Key findings about the topic</b>	8
HPV is the most commonly diagnosed viral sexually transmitted disease in the US and UK	8
Current HPV treatment regimes can be painful, intrusive and/or expensive	10
Merck & Co. and GSK are currently developing prophylactic HPV vaccines, primarily active against the oncogenic HPV types 16 and 18	11
While vaccination will gradually reduce the annual incidence of HPV infection, overall prevalence is unlikely to be impacted in the short to medium term	13
<b>ETIOLOGY AND EPIDEMIOLOGY</b>	14
<b>Disease definition</b>	14
Common warts	14
Palmoplantar warts	14
Genital warts	15
Cervical HPV infection	15
Flat warts	16
Recurrent respiratory papillomatosis (RRP)	16
<b>HPV and cervical cancer</b>	18
<b>Epidemiology</b>	19
<b>CLINICAL MANIFESTATIONS AND TREATMENT OPTIONS</b>	23
<b>Signs and symptoms</b>	23
Genital warts	24
Males	24
Females	24
Cervical disease	25
<b>Diagnosis</b>	25
<b>Current treatment options</b>	26
Chemotherapy	27
Immunomodulation	27

Surgical methods	28
Surgical removal	28
Cryosurgery	28
Electrosurgery	28
Laser surgery	28
Cavitron ultrasonic surgical aspirator (CUSA)	29
Acids	29
<b>Contra-indications</b>	29
<b>Developmental treatment options</b>	31
Antivirals	31
Polyphenon E	32
MBI 1121	33
Vaccines	33
Merck & Co.'s HPV vaccine	34
GSK's Cervarix	35
Therapeutic vaccines	36
<b>CURRENT MARKET OVERVIEW AND FUTURE FORECASTS</b>	38
<b>Current market overview</b>	38
Cost-benefits of HPV prevention	39
<b>Future market forecasts</b>	41
Patient potential	42
Prophylactic vaccine	43
HPV therapeutics	54
<b>STRATEGIC CONSIDERATIONS</b>	58
<b>Prophylactic vaccines</b>	59
Hepatitis B vaccination - a case study for future HPV vaccination programs	59
Disease overview	59
Effect of vaccination on HBV incidence and prevalence	60
Effect of inclusion on the immunization schedule	62
Positioning and marketing of HBV vaccines	64
<b>Antivirals</b>	69
<b>APPENDIX</b>	72
<b>Cervical cancer - classification and disease stages</b>	72
Atypical squamous cells of undetermined significance	72
Low-grade squamous intraepithelial lesions	72
High-grade squamous intraepithelial lesions	72
Atypical glandular cells of undetermined significance	73
Disease stages	73
<b>HPV vaccine study: details</b>	75
<b>Bibliography</b>	76
Journal articles	76

News/press releases	78
Websites	79
Research methodology	79
<b>Disclaimer</b>	80
<b>List of Tables</b>	
Table 1: Diseases and associated causative HPV types	17
Table 2: Estimated cervical cancer incidence, mortality rates and prevalence, seven markets, 2000	19
Table 3: HPV-16 seroprevalence by sex and age in the US, 2000	20
Table 4: Clearance and recurrence rates with different treatments for external genital warts	26
Table 5: Contra-indications for selected HPV treatments	30
Table 6: Overview of selected vaccines in development for the treatment of HPV and associated diseases	34
Table 7: Estimated costs of selected HPV treatment regimes	38
Table 8: Health and economic outcomes of HPV vaccination	40
Table 9: The impact of prevention of selected diseases in populations at average risk	40
Table 10: Intermediate health outcomes of HPV vaccination	41
Table 11: Total population by age (000s) seven markets, 2006	43
Table 12: Patient groups most likely to receive prophylactic HPV vaccination	43
Table 13: Estimated HPV vaccine peak sales following vaccination of infants, seven markets	45
Table 14: Estimated HPV vaccine peak sales following vaccination of adolescents (12-15 years), seven markets	48
Table 15: Estimated HPV vaccine peak sales following vaccination of adult women, seven markets	50
Table 16: Estimated number of infants receiving the HPV vaccine and annual resulting sales, seven markets	52
Table 17: Estimated number of 12 year olds receiving the HPV vaccine and annual resulting sales, seven markets	54
Table 18: Total population with genital or cervical HPV infection, seven markets 2003	55
Table 19: Estimated HPV therapeutic peak sales, seven markets	57
Table 20: HBV vaccine coverage across the seven major markets, 2001-02	62
Table 21: Currently available hepatitis B vaccines and their positioning in the market	64
Table 22: FIGO staging for cervical cancers	73
<b>List of Figures</b>	
Figure 1: Diagnosed cases of STDs in the UK, 1996-2002	15
Figure 2: New episodes of genital warts in the UK, 1996-2002	20
Figure 3: Incidence of cervical cancer in the seven major markets, 2003	22
Figure 4: Characteristics of selected common & non-genital wart infections	23
Figure 5: Summary of key unmet needs in HPV therapy	31
Figure 6: Key untapped patient population for HPV therapeutic regimes	42
Figure 7: Recommended childhood and adolescent immunization schedule, US 2004	44

Figure 8: HPV vaccine sales following vaccination of infants, seven markets (%)	46
Figure 9: HPV vaccine sales following vaccination of all adolescents, seven markets (%)	49
Figure 10: HPV vaccine sales following vaccination of adult women, seven markets (%)	51
Figure 11: Forecasted number of infants (1-2 years) eligible for the HPV vaccine per year, seven markets	52
Figure 12: Forecasted number of 12 year olds eligible for the HPV vaccine per year, seven markets	53
Figure 13: Estimated annual sales for HPV therapeutics, seven markets	56
Figure 14: Timeline for the launch of developmental HPV treatment options	58
Figure 15: Estimated new infections of HBV per year and total prevalence in 2001 in the US	61
Figure 16: Change in incidence of HBV infection in the UK and US, 1990-2002	63
Figure 17: GSK's positioning of Engerix vaccine	65
Figure 18: Positioning of the developmental HPV prophylactic vaccines	68
Figure 19: Global antiviral sales by company and indication, 2002	69
Figure 20: Global antiviral sales, 2002 & 2010	70
Figure 21: Treatment algorithm for cervical cancer	74

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