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# HerpV, GEN-003 vaccines to drive genital herpes treatment market growth

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The global market value for genital herpes therapeutics will increase from approximately $490 million in 2013 to just under $668 million by 2023, largely driven by the introduction of therapeutic vaccines, HerpV and GEN-003, towards the end of the forecast period.

However, the company's latest report states that this expansion, which will occur across the seven major markets (7MM) of the US, France, Germany, Italy, Spain, the UK, and Japan, represents a slow Compound Annual Growth Rate (CAGR) of 3.1%, inhibited by the highly generic nature of the genital herpes treatment space.

According to Dr Daian Cheng, GlobalData's analyst covering infectious diseases, while generic antivirals have been present in the genital herpes therapeutic marketplace for several years, the overall impact of generic erosion is still expected to be substantial across the 7MM.

Dr Cheng explains: "The low price of generic drugs not only will limit the sales of existing treatment, it also poses an entry barrier for new therapies. GlobalData predicts that the patient share of marketed antiviral drugs will further shift from branded to generic versions by 2023.

"Despite these barriers, the rise in the number of treated patients due to natural population increases in the US and five European countries (5EU) will produce moderate market growth. This will be further aided by the launches of Agenus' HerpV and Genocea's GEN-003 during the forecast period."

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HerpV is expected to be launched in the US in 2019 and GEN-003 in 2021, with both products launching in the 5EU one year after their US entries. As such, their largest impacts in the 5EU will occur after 2023.

Although the Japanese market is not anticipated to benefit from the sales of these vaccines, the launch of antiviral drug Amenamevir, which is only expected in Japan during the forecast period, is predicted to make moderate contributions to sales in this country.

Dr Cheng continues: "While HerpV will be the first-in-class therapeutic vaccine for genital herpes, GlobalData anticipates a relatively low initial uptake based on available efficacy data, which are not encouraging enough to guarantee rapid adoption.

"GEN-003 has shown more convincing efficacy data than HerpV and the vaccine is well-positioned to achieve commercial success. However, key opinion leaders interviewed by GlobalData expressed doubts about GEN-003, citing the need for data from a larger population."