

Landscape Assessment: Forecasting Product Revenue

Case

A preclinical start-up company with a groundbreaking treatment for snake bites

Challenge

To attract investors, the company needed to understand the global market potential for the product

Strategy

Rigorously demonstrate the size of the market and the product potential

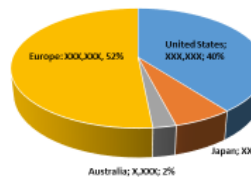
Solution

Market Assessment Analysis – Ardelis Health developed a detailed analytical model based on snake bite epidemiology and realistic assumptions to estimate the market for the US, Europe, Australia, and Japan.

Result: The company used the analysis to successfully raise equity, obtain a Department of Defense (DoD) contract, and partner with a major pharmaceutical company.

All Core Markets – Market Potential Human Use – Professional Segments

Country	Segment
United States	US Core Professional Segments
Japan	Japan Core Professional Segments
Australia	Australia Core Professional Segments
Europe	Europe Core Professional Segments
All Core Markets	Human Use Professional Segments



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Snakebite Epidemiology - Europe

- Venomous snakes exist in most countries in Europe with the exception of Ireland and Iceland
- The highest per-capita envenoming burden is in the Balkans

Country	Population 2011	Low	Medium
Total Europe	796,185,517	0.00	0.00
Albania	3,190,012	0.00	0.00
Austria	8,560,740	0.00	0.00
Belarus	9,698,791	0.00	0.00
Belgium	10,457,243	0.00	0.00
Bosnia & Herzegovina	3,524,819	0.00	0.00
Bulgaria	7,618,811	0.00	0.00
Croatia	4,525,298	0.00	0.00
Cyprus	854,871	0.00	0.00
Czech Republic	10,500,000	0.00	0.00

Table Adapted from Iannaccone, A. et al., "The Global Burden of Snakebite: A Literature Analysis and Modelling Study" *PLoS ONE* 10(12): e0171000, 2015. doi:10.1371/journal.pone.0171000

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Snakebite – Morbidity and Mortality

- Envenomings by snakebite create life- and limb-threatening emergencies depending on the species and characteristics of the bite*
 - Life-threatening effects of snakebite envenoming can include:
 - Shock
 - Spontaneous systemic bleeding
 - Paralysis involving respiratory muscles
 - Generalized breakdown of skeletal muscle (rhabdomyolysis)
 - Inflammation and tissue damage
 - Acute kidney failure and infection of necrotic tissue at the site of the bite
 - Extravasation of plasma and blood into the bitten limb causing edema, blistering and bleeding
 - Necrosis of the skin tissues and muscle
- Local pathological effects develop rapidly and irreversibly after venom injection and those who survive snakebite may suffer permanent sequelae*

* World Health Organization [Geneva]. "Bites and Envenomings – Report of a Consultative Meeting – 10 January 2007. Accessed at http://www.who.int/loader/products/animal_sera/Tables.pdf on June 4, 2015.