Chinese Animal Vaccine Industry - 2015

Description: From 2001, FMD, HPAI, PRRS and Swine were respectively been included in compulsory immunity vaccines, meanwhile, China's animal vaccine industry experienced a rapid development with a CAGR of 19.2 from 2000 to 2014. Currently the market size of China's animal vaccine industry has exceeded RMB 9 billion, which mainly formed up by pig and poultry vaccines with a respectively market share of 49% and 40% in 2014.

FMD Vaccine:

Currently there are only 7 enterprises received the official approval, including one that has not yet been put into production. CAHIC accounts for the largest share of the relatively stable governmental tender vaccine. For market-oriented vaccine, products from Jinyu Group are always in the state that lags behind demand.

HPAI Vaccine:

Currently there are 9 enterprises in this segment, HPAI sales would most probably exceed RMB 2 billion in 2015. Suspension cultivation will be the most promising direction in HPAI vaccine. Liaoning Yikang Biological Corporation Limited is the leading domestic enterprise in suspension cultivation.

PRRS Vaccine:

Porcine reproductive and respiratory syndrome would most probably no longer been an option of compulsory immunity in the near future. The existing inactivated and activated vaccines are still controversial nowadays. Gene engineering vaccine may achieve the break in this segment.

PCV Vaccine:

As the largest part of conventional vaccines, PCV came into market in 2010 with high price and low market penetration rate till now. China PCV market is led by Boehringer Ingelheim. Domestic enterprises such as Jinyu Group are now successively publishing relative gene engineering vaccines.

Swine Vaccine:

The tender price continuously decreasing and will be the first to be removed from compulsory immunity lists.

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