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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Contents:
Executive Summary
1. Analysis of Animal Vaccine Industry
   1.1 International Animal Vaccine Industry
   1.1.1 Market Size
   1.1.2 Market Structure
   1.1.3 Competition Pattern
   1.1.4 New Diseases and New Products
1.2 Chinese Animal Vaccine Industry
   1.2.1 Market Size
   1.2.2 Market Structure
   1.2.3 Import & Export
   1.2.4 Profit Level
   1.2.5 Entry Barriers
   1.2.6 Competition Pattern
2. Development Environment of China Animal Vaccine Industry
2.1 Policy
2.1.1 Major Policies
2.1.2 Compulsory Immunization Vaccine Tender System
2.2 Social Environment
2.2.1 Breeding Industry is Developing Steadily
2.2.2 Large-scale Breeding Becomes a Trend
2.2.3 Animal Epidemics Occur Frequently

3. Prospects of China Animal Vaccine Industry
3.1 Overall Forecast
3.2 Swine Vaccine
3.2.1 Swine Fever Vaccine
3.2.2 FMD Vaccine
3.2.3 PRRS Vaccine
3.2.4 Porcine Circovirus Vaccine
3.3 Poultry Vaccine
3.4 Cattle & Sheep Vaccine
3.5 Pet Vaccine

4. Major Companies
4.1 China Animal Husbandry Industry Co., Ltd. (CAHIC)
4.1.1 Company Profile
4.1.2 Revenue Structure
4.1.3 Key Financial Data
4.1.5 Animal Vaccine Business
4.2 Inner Mongolia Jinyu Group Stock Company
4.2.1 Company Profile
4.2.2 Revenue Structure
4.2.3 Key Financial Data
4.2.4 R&D
4.2.5 Animal Vaccine Business
4.3 Xinjiang Tecon Animal Husbandry Bio-Technology Co., Ltd.
4.3.1 Company Profile
4.3.2 Revenue Structure
4.3.3 Key Financial Data
4.3.4 R&D
4.3.5 Clients & Suppliers
4.3.6 Animal Vaccine Business
4.4 Ningbo TECH-BANK Co., Ltd.
4.4.1 Company Profile
4.4.2 Revenue Structure
4.4.3 Key Financial Data
4.4.4 R&D
4.4.6 Animal Vaccine Business
4.5 Zhejiang Shenghua Biok Biology Co., Ltd.
4.5.1 Company Profile
4.5.2 Revenue Structure
4.5.3 Key Financial Data
4.5.4 Clients
4.5.6 Animal Vaccine Business
4.6 Chengdu Huasun Group Inc. Ltd.
4.6.1 Company Profile
4.6.2 Revenue Structure
4.6.3 Key Financial Data
4.6.4 Clients & Suppliers
4.6.5 Animal Vaccine Business
4.7 Tianjin Ringpu Bio-technology Co., Ltd.
4.7.1 Company Profile
4.7.2 Revenue Structure
4.7.3 Key Financial Data
4.7.4 R&D
4.7.5 Animal Vaccine Business
4.8 Guangdong Dahuanong Animal Health Products Co., Ltd. (DHN)
4.8.1 Company Profile
4.8.2 Revenue Structure
4.8.3 Key Financial Data
4.8.4 R&D
4.8.5 Animal Vaccine Business
4.9 Liaoning Yikang Biological Corporation Limited
4.9.1 Company Profile
4.9.2 Revenue Structure
4.9.3 Key Financial Data
4.9.4 R&D
4.9.5 Clients & Suppliers
4.9.6 Animal Vaccine Business
4.10 Wuhan Chopper Biology Co., Ltd.
4.10.1 Company Profile
4.10.2 Revenue Structure
4.10.3 Key Financial Data
4.10.4 R&D
4.10.5 Clients & Suppliers
4.10.6 Animal Vaccine Business
4.11 Shanghai HILE Bio-Technology Co., Ltd.
4.11.1 Company Profile
4.11.2 Revenue Structure
4.11.3 Key Financial Data
4.11.4 R&D
4.11.5 Clients & Suppliers
4.11.6 Animal Vaccine Business

List of Tables:
Chinese Animal Vaccine Market Size, 2000-2014
Animal Vaccine Industry Chain
Chinese Animal Disease Classification
Global Animal Vaccine Market Size, 2008-2016E
Basic Information of Global Animal Health Product Industry Giants
Foreign Commercial Vaccines and Producers over the Years
China Animal Vaccine Market Size, 2000-2014
China Animal Vaccine Product Structure by Animal Attribute, 2008-2014
China Animal Vaccine Market Structure by Sales Method
Compulsory Immunization Vaccine Product Producers in China, 2014
China Commercial Vaccine Classification and Market Situation
Import / Export Volume of Veterinary Vaccine in China, 2008-2014
Average Import / Export Price of Veterinary Vaccine in China, 2008-2014 (Unit: USD/kg)
China Veterinary Vaccine Import Countries by Import Volume, 2014
China Veterinary Vaccine Export Destination Distribution by Export Volume, 2014
China Veterinary Vaccine Import Areas and % of Import Volume, 2014
China Veterinary Vaccine Export Areas and % of Export Volume, 2014
Barriers to Enter China Animal Vaccine Industry
Major Gaps between Chinese Vaccine Production Technology Level and International Advanced Level
Sino-foreign Animal Vaccine Joint Ventures, 1990-2014
Major Policies on Animal Vaccine Industry in China, 2010-2013
National Animal Disease Compulsory Immunization Program in 2014
Animal Diseases with Priority to Prevention and Cure in China, 2013-2020
Defects of China's Compulsory Immunization Tender System
Direction for China's Compulsory Immunization Tender System Reform
Meat, Eggs and Milk Output in China, 2008-2014 (Unit: million tons)
Per Capita Consumption of Pork, Beef and Mutton in China, 2008-2014 (Unit: kg)
China Meat Product Structure by Output, 2010-2014
Level of Large-scale Breeding in China, 2010-2020
Epidemic Prevention Costs of Pig Breeding in China, 2008-2014
Overview of Common Animal Epidemics in China
China Animal Epidemic Summary, 2013-2014
China Animal Vaccine Market Size, 2012-2016E
China Animal Vaccine Market Structure by Animal Attribute, 2012 vs. 2016E
Hog Breeding Stock and Slaughter in China, 2000-2014
China Swine Vaccine Market Size, 2012-2016E
Performance Comparison of Various Swine Fever Vaccines in China
China Poultry Vaccine Market Size, 2012-2016E
Newcastle Disease Vaccine Market Capacity and Ringpu Biology's Market Share
China Cattle & Sheep Vaccine Market Size, 2012-2016E
China's Per Capita GDP by Province/City, 2014
China Pet Vaccine Market Size, 2012-2016E
China Pet Vaccine Market Supply Companies

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