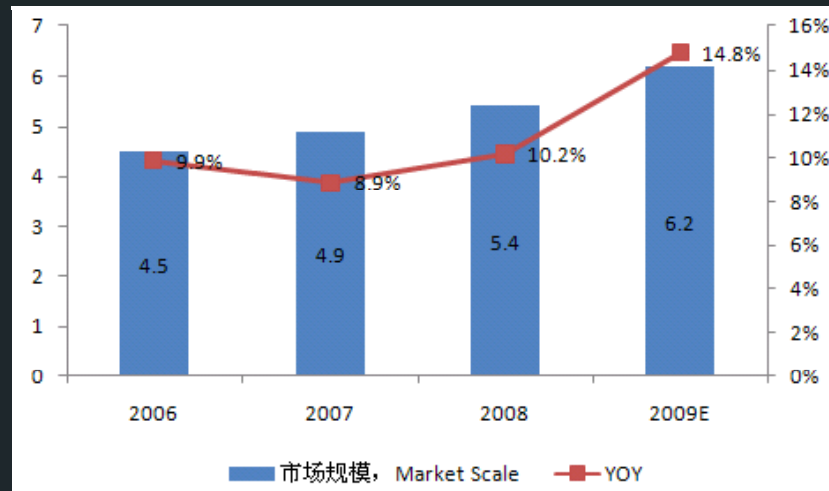


China Animal Vaccine Industry Report, 2009-2010



China's animal vaccine market has grown up steadily despite all the twists and turns in the livestock and poultry breeding market over the past four years. In 2009, the market scale reached around RMB6.2 billion, up 14.8% year-on-year, and will keep expanding with the development of the livestock and poultry breeding market.

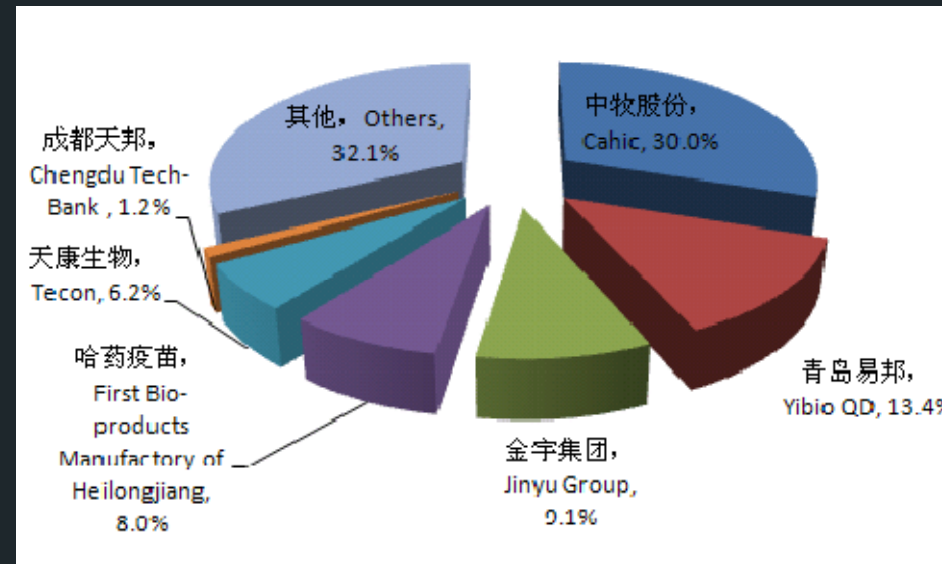
China's Animal Vaccine Market Scale and Y-o-Y Growth, 2006-2009 (Unit: RMB bn)



Source: ResearchInChina

Restricted by people's living habits and economic conditions, animal vaccine R&D and production in China mainly focuses on economic animal vaccines. In the meantime, the development of traditional national compulsory vaccines such as foot and mouth disease vaccine, bird flu vaccine, blue ear disease vaccine, hog cholera vaccine in China are relatively mature as a result of national animal vaccine procurement policies. In 2009, the compulsory vaccines accounted for over 86% shares in the entire animal vaccine market, which was basically shared by domestic companies. China Animal Husbandry Industry Co., Ltd. (CAHIC), Yebio Bioengineering Co., Ltd. (Yebio QD), Inner Mongolia Jinyu Group Co., Ltd. (Jinyu Group), Harbin Pharmaceutical Group Bio-vaccine Co., Ltd. (formerly "The First Bio-product Manufactory of Heilongjiang Province") and Xinjiang Tecon Animal Husbandry Bio-technology Co., Ltd. (Tecon) accounted for 66.7% shares. However, commercial animal vaccines, pet vaccines in particular, had a higher dependence on import. Imported pet vaccines approximately accounted for 70% of total domestic market sales value, and 30% of total domestic market sales volume.

Market Shares of China's Key Animal Vaccine Manufacturers by Sales, 2009



Source: ResearchInChina

Besides the operating environment, development status, market scale, supply & demand, competition, import & export and development prospect of China's animal vaccine industry, the report also made an in-depth analysis of the development, market scale, and development trend of global animal vaccine industry, as well as the operation, development prospect and advantages of China's key animal vaccine manufacturers.

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