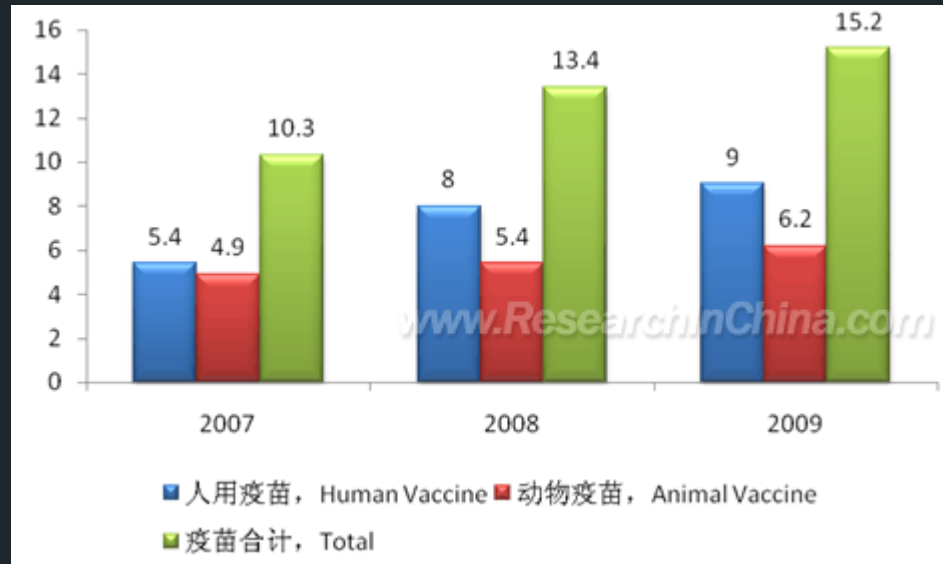


China Vaccine Industry Report, 2009-2010



Being one of the world's largest vaccine producers, China not only has many vaccine companies, various vaccine categories and large quantity, but also the human and animal vaccine enterprises are in general separated. At the end of 2009, there were around 38 human vaccine manufacturers and 54 animal vaccine producers that had passed CMP certification in China. With the development of national economy and the people's growing awareness of precautionary measures, Chinese vaccine market scale had increased continuously, with a CAGR of 21.5% during 2007-2009. In addition, the vaccine market size of China reached RMB15.2 billion in 2009, of which around RMB9 billion of human vaccine and RMB6.2 billion or so of animal vaccine were included.

Human Vaccine and Animal Vaccine Market Scale of China, 2007-2009 (Unit: RMB bn)



Source: SFDA, ResearchInChina

The vaccine industry is featured by high investment, high risk, long cycle and high profit. In spite of somewhat drop in profit in recent years due to increasingly intensive market competition, the overall profitability of the vaccine industry is still kept at a relatively high level thanks to the lower risk of disorderly competition as well as the restriction of barriers like policy, technology and capital. In 2009, the gross margin of animal vaccine industry was over 60%, and that of human vaccine industry was higher, above 70%.

Gross Margins of Major Human Vaccine Companies in China, 2007-2009

	2007	2008	2009
Hualan Biological		67.3%	84.8%
Tiantan Biological	70.6%	70.1%	69.2%
Liaoning Chengda	90.8%	90.0%	86.9%
CAHIC	63.5%	63.3%	62.3%
Inner Mongolia Jinyu Group	6.7%	62.9%	57.3%
Tecon	5.3%	64.7%	63.4%

Source: Annals, ResearchInChina

In fact, the compulsory and free EPI vaccines are dominant in inoculation vaccines in China on account of relatively low economic level and comparatively lower awareness of epidemic precaution. Taking human vaccine market for example, the release of EPI human vaccines reached 648.4261 million person doses in 2009, accounting for 80.4% of the total; while the extra EPI vaccine was only 158.512 million person doses, with a share of 19.6%. Yet, the sum of EPI vaccine only occupied 38.9% of the total being restricted by governmental procurement price, while the extra EPI vaccine covered 61.1%.

Focusing upon the overall vaccine market of China, the report also delves into the development status quo, market scale, market demand & supply, competition pattern, import & export, development prospect and relevant companies of human vaccine and animal vaccine market segments.

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