



China Human Vaccine Industry Report, 2010-2011

May 2011

This report

- ◆ **Analyzes the status quo of China human vaccine industry & market.**
- ◆ **Focuses on the human vaccine market segments in China, including hepatitis B vaccine, meningococcal vaccines, hepatitis A vaccine, influenza vaccine, influenza vaccine, varicella vaccine, and pneumococcal vaccines.**
- ◆ **Highlights the operation of major vaccine manufacturers in China.**

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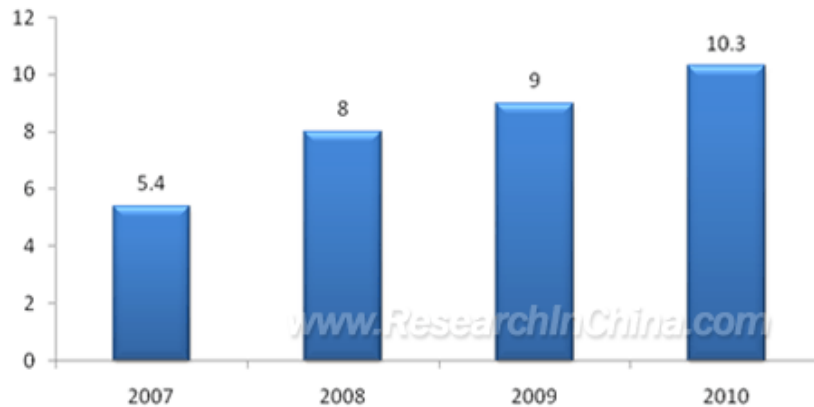
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Abstract

With the improvement of economy and people's disease prevention awareness, China's human vaccine market has expanded in recent years, growing at a CAGR of 24.0% in 2007-2010. In particular, the market scale in 2010 hit RMB10.3 billion, up 14.4% year-on-year.

Human Vaccine Market Scale, 2007-2010 (RMB bn)



Source: ResearchInChina

Under the influence of China's actual conditions and the vaccine industry characteristics, state-owned human vaccine enterprises take a lion's share in the market, especially in the EPI (Expanded Program on Immunization) vaccines market. In terms of lot release quantity, state-owned enterprises occupied 68.1% of the extra EPI vaccines market in 2010. For example, meningococcal vaccines and hepatitis A vaccine are mainly offered by state-owned enterprises including 6 research institutions under China National Biotec Group and Kunming Branch of Chinese Academy of Medical Science.

Granted, with the industry development, China's vaccine market is lowering its entry barrier and becoming more open. And private enterprises have become a new force in the extra EPI vaccines market, with market share soaring. Likewise, foreign enterprises are also major players in the extra EPI vaccines market by virtue of their technology and product advantages. In 2010, the market share of private enterprises and foreign enterprises in the extra EPI vaccines market marked 39.8% and 15.5% by lot release quantity

Taking HIB vaccine market for example, the market share of private enterprises and foreign ones in 2010 combined to 59.9% by lot release quantity. But in the pneumonia vaccines market, foreign enterprises including Sanofi Pasteur and Wyeth took up 49.6% by lot release quantity in 2010.

Although domestic enterprises have taken the leading position in the EPI vaccines market, they are going into overdrive to develop the highly profitable extra EPI vaccines market and have made some achievements. A case in point is Sinovac Biotech Co., Ltd., which is conducting clinical trial for its 13-valence pneumonia vaccine; on December 24th, 2010, the 71-type inactivated vaccine for hand-foot-mouth disease and enterovirus developed by China National Biotec Group was approved by the State Food and Drug Administration for clinical study.

Moreover, domestic vaccine enterprises have scored significant achievement in the R&D of therapeutic vaccines. For example, Chongqing Brewery has made smooth progress in the clinical trial of synthetic peptide hepatitis b vaccine. As of Feb. 2011, 101 subjects had finished 76-week-long phase II b clinical trial of the vaccine. Changchun High & New Technology Industries Group, the only listed company of China engaged in the R&D of AIDS vaccine, started the phase I clinical trial for its therapeutic AIDS vaccine in March 2011.

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