



**China Animal Vaccine Industry  
Report, 2010-2011**

**August 2011**

## ***This report***

- ◆ **Analyzes the status quo of China animal vaccine industry & market.**
- ◆ **Focuses on the human vaccine market segments in China, including Swine Vaccines and Poultry Vaccines**
- ◆ **Highlights the operation of major vaccine manufacturers in China.**

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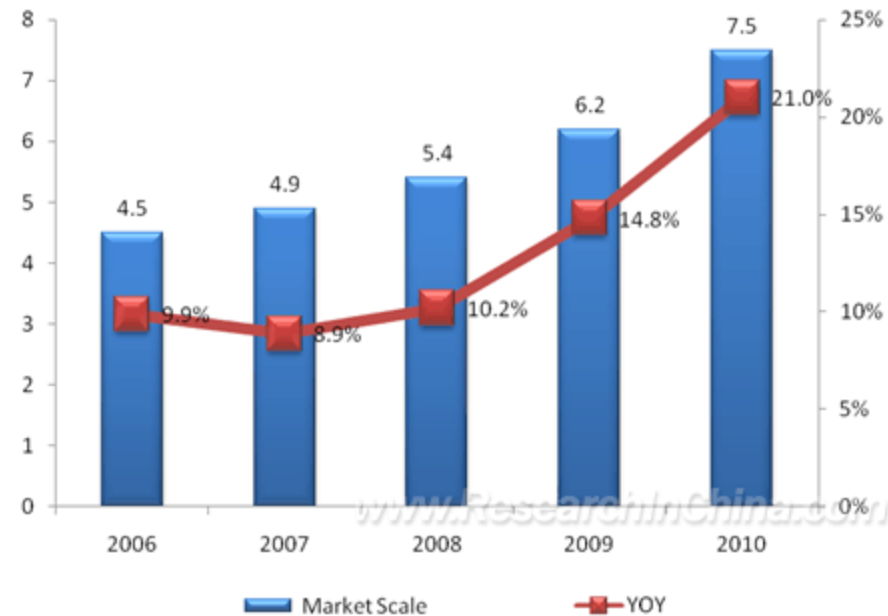
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## Abstract

China animal vaccine industry has been fast-growing. The market maintained an average annual growth rate up to 13.6% in 2006-2010, and reached around RMB 7.5 billion in 2010, up 21.0% YoY. With the increase of the state investment in animal epidemic funds, the expansion of compulsory immunization against animal epidemics and immunization scope as well as the strengthening of China livestock breeding industry standardization, China animal vaccine industry is expected to continue to maintain a relatively high growth momentum in future.

Although there are nearly 60 animal vaccine manufacturers in China, the market share is concentrated in the hands of a few enterprises. CAHIC, Yebio QD, Guangdong Dahuanong Animal Health Products, Tecon and Chengdu Tech-Bank are representatives of China animal vaccine industry, accounting for a market share of 37.4%. Sales of these companies mainly come from the government procurement of compulsory vaccines, wherein, the revenue from government compulsory vaccines accounted for 88% of the total animal vaccine revenue of CAHIC in 2010.

**Market Scale and YoY Growth Rate of China Animal Vaccine Industry, 2006-2010 (Unit: RMB bn)**



Source: ResearchInChina

According to China's compulsory immunization plan against animal epidemics in recent three years, China not only expands the application scope of the existing animal immunization products, but also attaches great importance to the upgrading of animal vaccine products at the same time. The applications of high-performance passage cell-derived vaccine, synthesis peptide vaccine, etc. are gradually being expanded, e.g., Classical Swine Fever Vaccine, Live (Cell Line Origin) expanded its application coverage from eight provinces in 2010 to sixteen provinces in 2011.

However, due to the high requirements on technology and equipment from passage cell-derived vaccine, synthesis peptide vaccine, etc., there are limited manufacturers available right now. Although CAHIC, Tecon, etc all start their layout in the field of Classical Swine Fever Vaccine, Live (Cell Line Origin), Guangdong Winsun Bio-pharmaceutical is still the major supplier in present market. Tecon, Shanghai Shenlian, CAHIC, etc involve in production and sales of synthesis peptide vaccine, but CAHIC produces synthesis peptide vaccine by purchasing antigen from Shanghai Shenlian.

In recent year, the scope of China animal compulsory vaccination is being gradually expanded. Constrained by economic conditions, the compulsory immunization against animal epidemics currently only contains five kinds of Epidemics of Class I, while there are about 17 kinds of Epidemic of Class I in China and other epidemics lead to greater risk as well. With the increasing recognition of animal epidemic prevention and control from breeding enterprises and individuals, the future demand for conventional self-pay vaccine will be further enhanced. As China livestock breeding relies mainly on raising pig and poultry, Newcastle disease vaccine and porcine circovirus vaccine will be two conventional vaccines with pretty good market prospects.

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