



**China Animal Vaccine Industry Report,
2011-2012**

Jun 2012

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

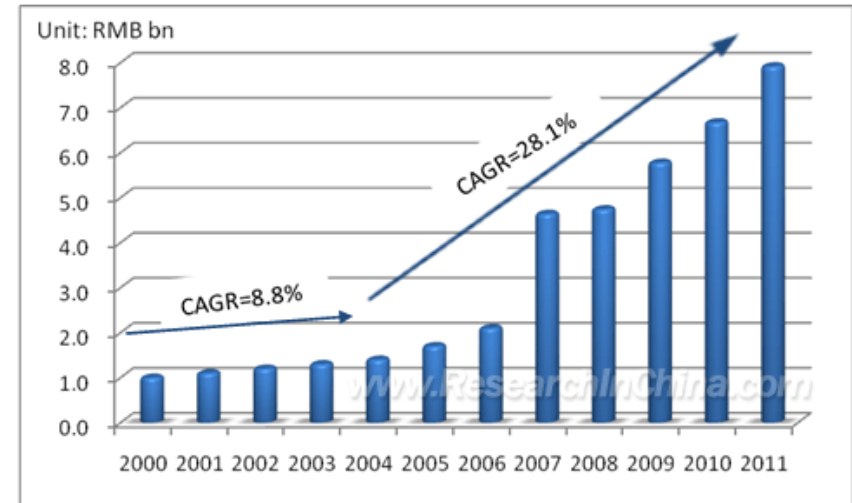
INFORMATION SOURCES

The primary information sources include NBS (National Bureau of Statistics of China), China Customs and annual reports of listed companies etc.

Abstract

Along with the frequent outbreaks of animal epidemics, the government's increasing investment in epidemic prevention and the implementation of compulsory immunization system, Chinese animal vaccine market shows vigorous development. In 2011, the market size of animal vaccine in China hit RMB7.92 billion. Since 2004, foot-and-mouth disease, highly pathogenic avian influenza (HPAI), highly pathogenic porcine reproductive and respiratory syndrome (HP-PRRS), swine fever and peste des petits ruminants have been brought into the scope of compulsory immunization by the government, which promotes the animal vaccine market to grow 28.1% annually. It is expected that Chinese market size of animal vaccine will amount to RMB9.56 billion in 2012.

Market Size of Chinese Animal Vaccine, 2000-2011



Source: Ministry of Agriculture of P.R.C.; China Veterinary Drug Association; ResearchInChina < China Animal Vaccine Industry Report, 2011-2012 >

Pig and poultry raising is the backbone of Chinese animal husbandry, and the swine and poultry vaccines occupy more than 80% of China's animal vaccine market. In 2011, the total sales of animal vaccines produced by Chinese animal vaccine enterprises approximated RMB7.11 billion (excluding net import value), of which the sales of swine vaccine and poultry vaccine registered RMB3.51 billion and RMB3.01 billion respectively, making up 49.4% and 42.3% of the total sales separately.

Chinese animal vaccine industry features high degree of industry concentration. In 2011, among major Chinese animal vaccine manufacturers, China Animal Husbandry Industry Co., Ltd. ranked No. 1 for its revenue of RMB1.18 billion, accounting for 14.9% market share. Moreover, the companies with market share of over 5.0% also include Xinjiang Tecon Animal Husbandry Bio-technology Co., Ltd., Guangdong Dahuanong Animal Health Products Co., Ltd. and Jinyu Group. As the state strengthens the regulatory oversight and the consumer's brand awareness is improving, the concentration degree of Chinese animal vaccine industry will be enhanced as well.

It is in the report that covers the followings:

- The market size, market structure, competitive landscape and technology development direction of the global animal vaccine industry;
- The market size, import & export, profit, entry barriers, competition pattern and entry of foreign capital of Chinese animal vaccine industry;
- Policy environment, compulsory immunization tendering system, reform direction and its influence on downstream husbandry development;
- The forecasts of Chinese animal vaccine industry, including overall market, swine vaccine, poultry vaccine, cattle & sheep vaccine and pet vaccine, etc.;
- Production, operation, investment, M&A, clients and suppliers, animal vaccine business and development forecast of 11 major animal vaccine enterprises in China.

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