



**China Animal Vaccine Industry Report,
2012-2015**

June 2013

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 Company Reports, and National Bureau of Statistics of China etc.

Abstract

In view of the frequent occurrence of animal epidemic diseases over the years, the Chinese government has increased investment in epidemic prevention and implemented compulsory immunization system. Beginning in 2004, it has gradually included highly pathogenic avian influenza, highly pathogenic PRRS (porcine reproductive and respiratory syndrome), classical swine fever and peste des petits ruminants in the national compulsory immunization coverage following the FMD (foot-and-mouth disease), thus leading to rapid growth in animal vaccine market size.

In 2004-2012, China's animal vaccine market size grew at a CAGR as high as 26.4%, up to approximately RMB 9.1 billion in 2012 (including net import). For years to come, the market is expected to continue to maintain a growth rate of 15% or so, to RMB 15.9 billion in 2016.

Chinese animal vaccine products include swine vaccine, poultry vaccine, cattle & sheep vaccine, pet and other vaccines. As pig and poultry breeding is the core of China's animal husbandry, swine and poultry vaccines account for more than 85% of China's animal vaccine market. In addition, the emerging pet industry is boosting vigorous growth in demand for pet vaccine, while there are few commercial pet vaccines from Chinese animal vaccine companies, mainly dependent on imported products with stiff prices. In future, the Chinese pet vaccine market will usher in large room for promotion.

China Animal Vaccine Market Size, 2000-2012



Source: Ministry of Agriculture, China Veterinary Drug Association, ResearchInChina China Animal Vaccine Industry Report, 2012-2015

In 2006, China carried out compulsory veterinary drug GMP certification, raised the industry access threshold, which brought a substantial decline in the number of animal vaccine enterprises, accompanied by increased industry concentration. In 2012, among domestic leading animal vaccine enterprises, China Animal Husbandry Industry Co., Ltd. made the highest animal vaccine revenue of RMB 1.17 billion, with market occupancy up to 12.9%; followed by Qingdao Yebio Bioengineering Co., Ltd (Zhejiang Shenghua Biok Biology Co., Ltd holds 38% stake), Xinjiang Tecon Animal Husbandry Bio-Technology Co., Ltd., Guangdong Dahuanong Animal Health Products Co., Ltd., Inner Mongolia Jinyu Group Stock Company, etc..

The Chinese animal vaccine market can be divided into two segments, i.e. government-procured compulsory immunization vaccines and market-oriented vaccines. Currently, there are merely five kinds of compulsory immunization vaccines, and more vaccines are market-oriented. However, in China, compulsory immunization vaccines still hold a market share of over 50%, with highly fierce competition but limited growth potential; by contrast, market-oriented vaccines will enjoy a larger space for development no matter in new product development or in animal protection improvement.

China Animal Vaccine Industry Report, 2012-2015 of ResearchInChina mainly covers the followings:

- Market size, market structure, competition pattern, etc. of global animal vaccine industry;
- Market size, market structure, competition pattern, import & export, etc. of China animal vaccine industry;
- Policy environment, social environment, downstream demand, etc. of China animal vaccine industry;
- Scale & structure prediction for China animal vaccine market and market segments;
- Operation, animal vaccine business, forecast & outlook, etc. of 10 animal vaccine producers in China.

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