



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

Aug. 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

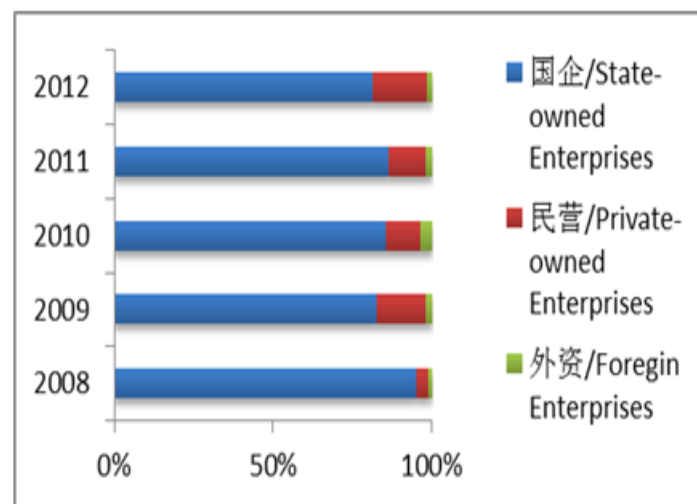
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

In the wake of China's economic growth and enhanced disease prevention awareness, Chinese human vaccine market has been expanding. In 2012, Chinese human vaccine market valued RMB10.5 billion with the lot release quantity of roughly 773 million person-ports. Restricted by China's national conditions and policies, EPI vaccines still prevail in China and Chinese EPI vaccine market is almost monopolized by state-run enterprises represented by CNBG Tiantan Biological, Biological Products Institutes in Changchun, Chengdu, Wuhan, Shanghai and Lanzhou, and Institute of Medical Biology of Chinese Academy of Medical Sciences in Kunming. In 2012, state-owned enterprises seized 81.5% of the vaccine lot release quantity in Chinese EPI vaccine market.

However, along with the gradual relaxed access to the vaccine market, private companies have sprung up in the Extra EPI vaccine market and acquired more market share. Meanwhile, foreign counterparts occupy considerable market share by virtue of their technological and product advantages. In 2012, private and foreign-funded enterprises occupied 49.9% and 22.1% (by lot release quantity) of Chinese Extra EPI vaccine market respectively. As for human rabies vaccine and varicella vaccine markets, they mastered more than 85% of each.

Chinese EPI Vaccine Market Structure (by Enterprise Type), 2008-2012



Source: National Institute for the Control of Pharmaceutical and Biological Products and other seven institutes; ResearchInChina China Human Vaccine Industry Report, 2012-2015

In recent years, China has made some achievements in overseas vaccine markets. In 2011-2012, China's annual human vaccine export volume remained over 9,000 tons (9,840 tons in 2010 was subject to the accidental H1N1 flu event), far more than 8,110 tons in 2009. Moreover, many domestic vaccine companies are still planning overseas markets aggressively.

By the end of 2012, the first batch of Hib vaccine products of Walvax Biotechnology were approved by China Customs and exported to Manila, Philippines for official marketing. Walvax Biotechnology is promoting the product registration in Russia, India, Thailand and other countries. In November 2012, Hualan Biological Engineering mailed three consecutive batches of samples for influenza virus split vaccine to WHO for testing. The company is expected to receive WHO's spot verification certification in 2013. On March 7, 2013, Tiantan Biological obtained the production approval for polio attenuated live vaccine (liquid OPV). In accordance with the cooperation agreement with Bill & Melinda Gates Foundation in 2011, Tiantan Biological will supply OPV to United Nations International Children's Emergency Fund (UNICEF) formally.

In addition, it is worth mentioning that the industrialization of the world's first recombinant hepatitis E vaccine (Escherichia coli) developed by Xiamen University and YangShengTang INNOVAX jointly was realized on October 27, 2012. As of the end of 2012, the lot release quantity of the product hit 90,000 person-portions.

China Human Vaccine Industry Report, 2012-2015 mainly contains the following aspects:

Operating environment, status quo, market supply and demand, competition pattern and development prospects of human vaccine in China;
Market supply and demand, competition patterns, market prices and development trends of 10 kinds of products including hepatitis B vaccine, influenza vaccine, Hib vaccine, human rabies vaccine and pneumococcal vaccine in China;
Import & export volume and value as well as import sources & export destinations of human vaccine in China;
Operation, revenue structure, vaccine business and development trends of 11 Chinese vaccine enterprises including Tiantan Biological, Hualan Biological Engineering, Zhifei Biological, Walvax Biotechnology and Sinovac Biotech.

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