

China Human Vaccine Industry Report, 2014-2017

Aug. 2014

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

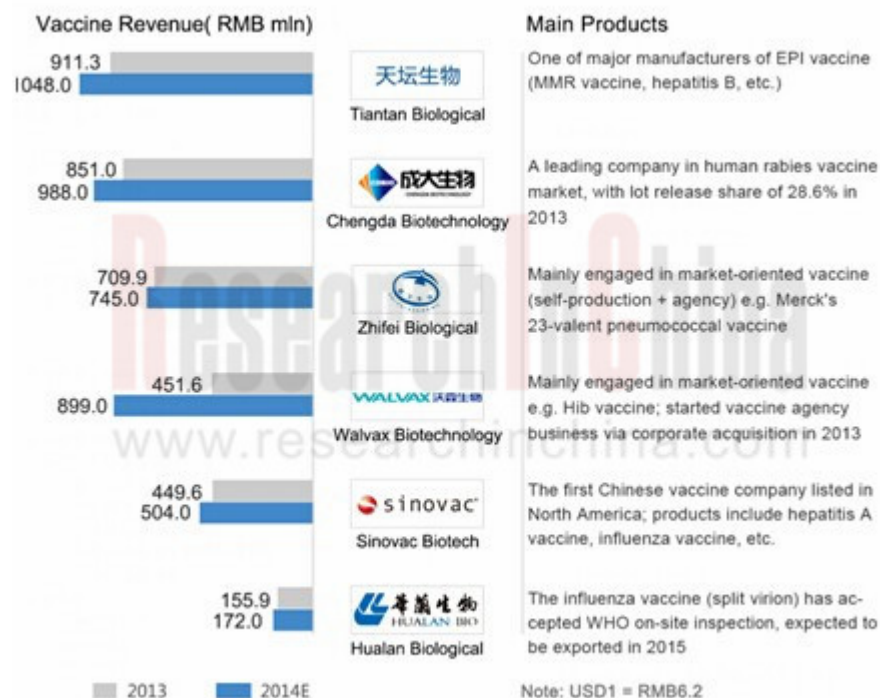
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

Vaccines can prevent and control infectious diseases, so the demand for these biological products is relatively rigid. In 2013, China's human vaccine lot release volume grew by 4.9% from a year earlier, and the market size expanded 2.8% year on year. As vaccination is suspected of causing death and some companies (such as Shenzhen Kangtai, Tiantan Biological and Dalian Hissen) have to shut down the production of some products after failing to pass the new GMP certification, China's human vaccine market supply and demand may witness a slight decline in 2014, but it is still expected to grow steadily in the long run.

Affected by China's economic level, national vaccine prevention policies and people's awareness, free EPI vaccines prevail in China with a share of approximately 80% in the total lot release volume. Also, the Chinese health authorities are trying to improve the quality of EPI vaccines. For example, Huizhou City of Guangdong province takes the lead to contain poliomyelitis inactivated vaccines into its immunization program (Sanofi Pasteur acts as a supplier in this program) for a trial in 2014. However, this program stipulates the injection of the poliomyelitis inactivated vaccine "IPV" for the first two vaccinations, while requires the oral administration of the poliomyelitis attenuated vaccine "OPV" for the third and fourth vaccinations.

Vaccine Revenue and Main Products of Major Vaccine Companies in China, 2013-2014



Source: China Human Vaccine Industry Report, 2014-2017 by ResearchInChina

Chinese human vaccine market is still dominated by Beijing Tiantan Biological, Chengdu Institute of Biology under Chinese Academy of Sciences, Shanghai Institute of Biological Products Co., Ltd. , Lanzhou Institute of Biological Products Co., Ltd., Wuhan Institute of Biological Products Co., Ltd., Changchun Institute of Biological Products Co., Ltd., Institute of Medical Biology under Chinese Academy of Medical Sciences and other state-owned enterprises; but, their market share is falling. In 2013, the lot release volume of Chinese state-owned enterprises accounted for 69.9%, down 8.6 percentage points compared with last year; whereas, the share of private and foreign-funded enterprises jumped by 6 percentage points and 2.6 percentage points over the previous year respectively.

The improved quality of Chinese vaccines, the increased export tax rebates (from 13% in 2009 to 15%) and other favorable factors have prompted China's human vaccine export volume and value to grow quickly. From January to June of 2014, the export volume and value amounted to 65.08 tons and USD15.45 million respectively, representing the separate increase of 115.6% and 50% over the same period of last year.

As China's vaccine regulatory system is recognized by WHO, Chengdu Institute of Biology under Chinese Academy of Sciences, Beijing Tiantan Biological, Hualan Biological and other domestic vaccine companies are actively submitting pre-certification application to WHO in order to further expand overseas markets. In October 2013, the JE (Japanese encephalitis) vaccines of Chengdu Institute of Biology under Chinese Academy of Sciences were pre-certified by WHO at first and included in the procurement list of the United Nations. WHO inspected the influenza (split virion) vaccines of Hualan Biological on the spot in April 2014, and these vaccines are expected to be exported in 2015.

The report covers the following:

- Operating environment, status quo and sales channels of China human vaccine industry;
- Market supply & demand, competition patterns, import & export and development prediction of China human vaccine industry;
- Market supply & demand, competition patterns and market prices of 10 kinds of vaccine products including hepatitis B vaccine, influenza vaccine, rabies vaccine and pneumonia vaccine in China;
- Operation, vaccine business and development prospects of 11 Chinese human vaccine enterprises.

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