

China Human Vaccine Industry

Report, 2015-2018

Mar. 2015



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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 costeffective 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.

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Abstract

A vaccine is a preventive biological product for human use that prevents and controls the occurrence and prevalence of infectious diseases, so the demand for such products is relatively rigid. Due to suspected deaths stemming from vaccination and some companies' (such as Shenzhen Kangtai, Tiantan Biological and Dalian Hissen) production halts of some products because of their failure to pass new GMP certification, China's human vaccine lot release volume in 2014 declined by 2.4% year on year to 791 million doses.

Affected by China's less-developed economy, existing national vaccine prevention policies and people's awareness of epidemic prevention, free EPI vaccines prevail in China with a share of about 80% in the total lot release volume. Chinese free human vaccine market is still dominated by Beijing Tiantan Biological Products, Chengdu Institute of Biological Products Co., Ltd., Shanghai Institute of Biological Products Co., Ltd., Lanzhou Institute of Biological Products Co., Ltd., Wuhan Institute of Biological Products Co., Ltd., Institute of Medical Biology under Chinese Academy of Medical Sciences and other state-owned enterprises, but their market shares are falling. In 2014, the EPI vaccine lot release volume of Chinese state-owned enterprises accounted for 72%, down 6.5 percentage points compared with the previous year.

However, as China gradually relaxes control over the vaccine market, private companies and foreign players are emerging in market segments of extra EPI vaccine, with their proportions increasing constantly, accounting for 80% in terms of lot release volume. Moreover, private and foreign brands hold a dominant position in the markets of Haemophilus influenza B (Hib), human rabies vaccine, varicella vaccine, and influenza vaccine, together making up 91.9%, 83.6%, 86.5%, and 69.5% in terms of lot release volume in 2014.

Being bullish about China's demand for human vaccines and exports, many vaccine producers scale up efforts in vaccine R&D or expand capacity, such as Walvax Biotechnology. By early 2015, GMP on-site certification had been carried out for the company's Diphtheria-tetanusacellular pertussis combined vaccine adsorbed; HPV bivalent (types 16 and 18) vaccine and DTaP/Hib had made their way into clinical trials; the company is applying registration for meningococcal polysaccharide vaccine (Group A/C/Y/W 135) and other vaccines in Nigeria, Chile, Peru, Thailand, and India.

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China Human Vaccine Industry Report, 2015-2018 highlights the following:

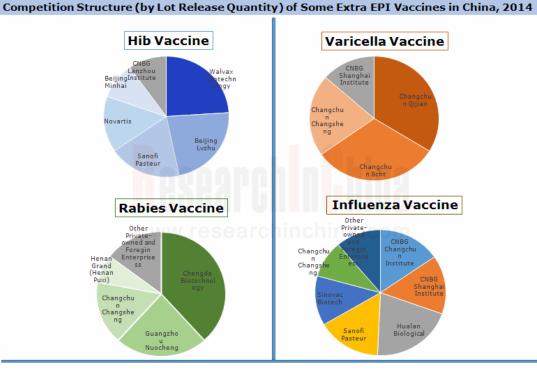
Operating environment, overall situation, sales channel, etc. of China human vaccine industry;

Supply & demand, competitive landscape, import & export, and development forecast of the Chinese human vaccine market;

Supply & demand, competitive landscape, and market prices of 10 product segments (including hepatitis B vaccine, influenza vaccine,

rabies vaccine, and pneumococcal vaccine) in China;

Deration, vaccine business, and development prospects of 16 Chinese human vaccine companies.



Source : China Human Vaccine Industry Report , 2015-2018

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