

# China Animal Vaccine Industry Report, 2019-2025

Feb.2020

## 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

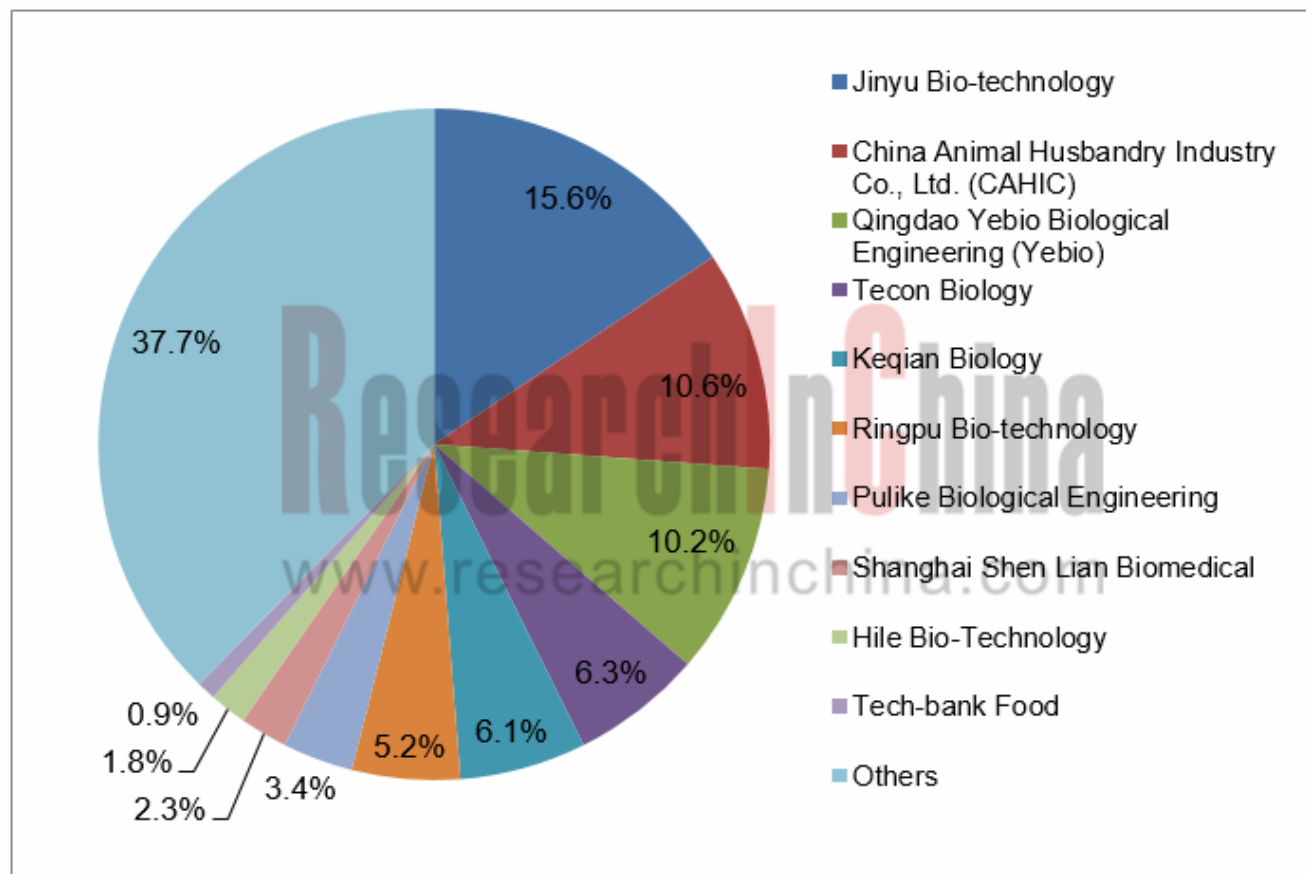
Chinese animal vaccine industry showed a CAGR of 8% between 2013 and 2017, but it was depressed by the outbreak of African Swine Fever in 2018 with the market size edging down 2.5% on an annualized basis. As estimated, the animal vaccine market would plummet by 5.4% and stand at RMB11.2 billion in 2019.

Meanwhile, the demand for poultry meat, beef and mutton rises steadily, so does the vaccines for poultry, cattle and sheep. As ASF vaccines are anticipated to be available on the market in 2020 and the quantity of live hogs picks up, the hog vaccine market will bottom out and begin to rise in the upcoming years, being expectedly worth RMB17.18 billion in 2025. In China, animal vaccines are mainly for hogs, poultry, cattle and sheep. Yet, the hog vaccine market plunged as a result of the African Swine Fever, triggering an estimated market share down to 28.3% in 2019 when the poultry vaccines would hold a share up to 39.1%.

Animal vaccines fall into the vaccines used for compulsory vaccination and the market-oriented vaccines in China, where the former covers the diseases such as highly pathogenic avian influenza, aftosa, peste des petits ruminants (PPR), Brucellosis, and hydatidosis. Porcine Reproductive and Respiratory Syndrome (PRRS) and hog cholera started to be excluded from compulsory vaccination in 2017, which is conducive to the more lucrative market-priced vaccines for animals.

Chinese animal vaccine industry is currently dominated by homegrown companies like Jinyu Bio-technology, China Animal Husbandry Industry Co., Ltd.(CAHIC), Qingdao Yebio Biological Engineering Co., Ltd. (Yebio), Tecon Biology, Keqian Biology, Ringpu Bio-technology, and Pulike Biological Engineering. Among them, Jinyu Bio-technology is the largest producer of animal vaccines in China, with its revenue in 2018 reporting RMB1,845.5 million and enjoying a 15.6% share of the domestic animal vaccine market.

## Market Share of Animal Vaccine Companies in China, 2018



Source: ResearchInChina

In addition, the broad prospects of Chinese animal vaccine industry draws attention from foreign companies like MSD and Boehringer Ingelheim, and they have made inroads in the Chinese market through joint ventures, acquisitions and sole proprietaries.

China's animal vaccines are heading towards:

- i.) The growing concentration of the industry: Chinese animal vaccine producers are now faced with huge overcapacity, low capacity utilization and serious homogenization of products. Some leading Chinese players have staged mergers and acquisitions successively to be more competitive. The industry concentration is on a steady rise.
- ii.) New products facilitate the development of the industry: In 2018, there were a total of 71 new veterinary drugs in China, including 22 registrations of vaccine new veterinary drugs or a 31% share. The roll-out of vaccine new veterinary drugs is expected to boost the development of the animal vaccine industry;
- iii.) African Swine Fever brings growth potential: A nosedive in the quantity of live hogs since the outbreak of the African Swine Fever in China in August 2018 leads to a tumble in the hog vaccine market. Breakthroughs have been made by China in vaccination for African Swine Fever. In October 2019, China first isolated the structure of the ASF virus, and pilot production of the ASF vaccine has been fulfilled. The vaccine will be ratified and launched to the market in 2020, significantly invigorating the hog cholera vaccine market.

China Animal Vaccine Industry Report, 2019-2025 highlights the followings:

- Animal vaccine market in China and beyond (market size & structure, import & export, competitive landscape and development tendencies);
- Environments (policy climate and social environment) for the development of China's animal vaccine industry;
- Animal vaccine market segments in China;
- 16 Chinese animal vaccine companies (operation, revenue structure, gross margin, R&D costs, animal vaccine business, etc.)

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- 1.1 Definition
- 1.2 Classification
- 1.3 Industry Chain

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  - 2.1.1 Market Size
  - 2.1.2 Market Structure
  - 2.1.3 Competitive Landscape
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  - 5.1.4 Gross Margin
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Chinese Poultry Vaccine Market Size, 2013-2025E

Chinese Cattle and Sheep Vaccine Market Size, 2017-2025E

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