

**China Human Vaccine Industry Report,
2020-2026**

Jul.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

In China, the lot release for human vaccines plunged by 17.7% in 2018 when the production record fraud of rabies vaccines for human use, freeze-dried by Changsheng Bio-Technology was exposed. The impact fades away amid tighter control on human vaccines in China. In 2019, National Institutes for Food and Drug Control (NIFDC) approved 570 million doses of human vaccine with a year-on-year increase of 5.4%, among which there was more lot release volume of diphtheria, tetanus and acellular pertussis combined vaccine (adsorbed), recombinant Hepatitis B vaccine, and rabies vaccine for human use (freeze-dried), together sharing 33.9% of the total.

The Chinese human vaccine market is now occupied by local companies, where the state-owned enterprises command more than a half of the market. In the first half of 2020, the players had more lot releases, such as China National Biotec Group (CNBG), Institute of Medical Biology, Chinese Academy of Medical Sciences, Walvax Biotechnology, Amy Biotech & Vaccine, Liaoning Cheng Da, NCPC GeneTech Biotechnology, and Sinovac Biotech, holding a combined 82.2% of the total. Noticeably, CNBG takes a lion's share 43.3%, leading the pack in the industry.

Although the Chinese human vaccine market is ruled by local companies, the imported vaccines are largely the extra EPI vaccines (not free, and residents can choose whether they want to be inoculated) such as 13-valent pneumonia vaccine, HPV vaccine and DTaP-IPV/Hib vaccine. Yet, the 13-valent pneumonia vaccine of Walvax Biotechnology and the 2-valent pneumonia vaccine of Xiamen Innovax Biotech are approved successively for general availability in the market, challenging the overseas vaccine giants at their games and scrambling for more market shares by price advantage, accompanied by the to-be-soon-launched vaccines like 13-valent pneumonia vaccine of Shenzhen Kangtai Biological Products Co., Ltd., 2-valent/9-valent HPV vaccines of Walvax Biotechnology, 4-valent influenza vaccine and 15-valent pneumonia vaccine of Chongqing Zhifei Biological Products Co., Ltd.

The devastating COVID-19 in more than 100 countries causes a total of over 14.77 million cases infected and approximately 609,000 deaths. The mortality rate is high up to 4.1% and the overriding research about coronavirus vaccine and clinical trials get under way.

In at least 200 coronavirus vaccine programs worldwide to date, China stays ahead temporarily in the R&D progress. Seven coronavirus vaccines are in the clinical phase, and Ad5-nCoV, an adenovirus vaccine being co-developed by CanSino Biologics, Inc. and the team led by the academician Chen Wei at the Biological Engineering Institute of Academy of Military Medical Sciences, is advancing faster as its phase-III clinical trials are in place. To curb the pandemic, the related authorities of China will accelerate the examination and approval process for a shorter development cycle and a faster launch to save lives.

Highlights of this report:

- Human vaccine industry in China (environments, status quo, market demand, market size, import & export, competition pattern);
- Human vaccine market segments in China (market demand, lot releases, competitive landscape);
- 22 human vaccine companies (operation, vaccine business, etc.);
- Conclusions and development tendencies.

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