

Global Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine market size is expected to reach \$ 21.08 million by 2032, rising at a market growth of 4.1% CAGR during the forecast period (2026-2032).

Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Vaccine, Live is a modified live swine vaccine used for the prevention of highly pathogenic PRRS, also known as highly pathogenic porcine blue ear disease in China. Major commercial forms include monovalent vaccines based on JXA1-R, TJM-F92, GDr180, HuN4-F112 and related attenuated strains, as well as limited combination vaccines and heat-stabilized formulations containing a highly pathogenic PRRS component. Upstream inputs mainly include attenuated PRRSV seed strains, Marc-145 cells or other suitable cell substrates, culture media, serum or serum-free supplements, stabilizers, lyophilization protectants, diluents, glass vials, rubber stoppers, aluminum caps, labels and cold-chain packaging materials. Downstream customers mainly include integrated swine farming groups, breeding farms, commercial pig farms, veterinary drug distributors, animal disease control institutions and farm technical service providers. In 2025, global production capacity is estimated at around 286 million doses, with sales volume of about 207 million doses and an average ex-factory price of approximately USD 0.070–0.081 per dose; China accounts for the dominant share of both supply and demand, while overseas sales are limited and mainly related to export registration and use in nearby swine-producing markets. This is an approval- and batch-release-driven veterinary biologics segment with a relatively small single-product market size but strong disease-control relevance for pig farms. The estimated industry gross margin in 2025 is around 45%–60%, with leading producers benefiting from larger batch scale, established distribution channels and strain resources, while smaller suppliers face

greater margin volatility due to batch size, channel discounts and cold-chain costs.

The current market is mainly supported by disease prevention demand in China's swine farming sector, with supply concentrated among companies that have veterinary biologics manufacturing qualifications, strain resources, product approvals and batch-release capabilities. The category is highly regulated, and entry barriers are mainly reflected in seed strain access, cell culture processes, quality control systems, cold-chain distribution and technical service capabilities for pig farms. Because the core product is closely linked to China's control system for highly pathogenic porcine blue ear disease, only a limited number of companies have stable commercial supply globally. Competition is therefore driven more by strain routes, batch consistency, channel coverage and large-farm customer resources than by simple price competition.

On the demand side, large-scale swine farming groups, breeding farms and commercial pig farms remain the main users, and vaccination strategies are closely related to herd PRRS status, regional strain circulation, biosecurity level and hog price cycles. Large farming groups place greater emphasis on systematic immunization programs and product consistency, and generally prefer suppliers with stable batch-release records, accumulated field experience and strong technical service capabilities. Small and medium-sized farms rely more on distributors and regional veterinary service networks, with purchasing decisions more affected by price, channel recommendations and local disease pressure. Overall demand remains relatively resilient, but usage intensity varies significantly across regions and farm types.

Future development will focus on safety improvement, strain matching, process upgrading and optimization of immunization programs. Traditional modified live vaccines still have advantages in immunogenicity, accumulated use experience and market acceptance, but as farms pay more attention to disease elimination and herd health management, concerns over viral shedding, reversion risk and safety under mixed-infection conditions are becoming more prominent. Suspension culture, heat-stabilized formulations, combination vaccines and data-supported precision vaccination programs will become important paths for suppliers to strengthen competitiveness. As circulating PRRSV strains continue to evolve, companies will need stronger capabilities in field strain monitoring, clinical evaluation and product iteration.

The main growth drivers include the rising share of large-scale farming, continued investment in major swine disease control, more standardized veterinary vaccine regulation and upgrades in supplier service capabilities. Key constraints include

fluctuations in hog prices that affect farm-level vaccination budgets, reduced use of live vaccines in high-health-status farms, safety concerns related to modified live vaccines, unstable protection caused by regional strain differences, and cost pressure from cold-chain logistics and batch quality control. Overall, this market is more of a stable and structurally adjusting segment than a high-growth category. Future growth will depend less on new capacity expansion and more on product upgrades, customer concentration and stronger service capabilities for large-scale pig farms.

This report studies the global Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine total production and demand, 2021-2032, (K Dose)

Global Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine total production value, 2021-2032, (USD Million)

Global Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Dose), (based on production site)

Global Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine consumption by region & country, CAGR, 2021-2032 & (K Dose)

U.S. VS China: Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine domestic production, consumption, key domestic manufacturers and share

Global Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Dose)

Global Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Dose)

Global Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Dose)

This report profiles key players in the global Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Dahuanong Animal Health, Zoetis, Jilin Teyan Biotechnology, Qingdao Yebio Bioengineering, Sinopharm Yangzhou Vac Biological Engineering, Pulike Biological Engineering, Guangdong WINSUN Bio-pharmaceutical, Sinovetah Biological Pharmaceutical, TECON Pharmaceutical, Harbin Veken Biotechnology, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Dose) and average price (US\$/Dose) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine Market, Segmentation by Type:

JXA1-R Strain Live Vaccine

TJM-F92 Strain Live Vaccine

GDr180 Strain Live Vaccine

Others

Global Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine Market, Segmentation by Product Combination:

Monovalent HP-PRRS Live Vaccine

Bivalent Vaccine Containing HP-PRRS Component

Others

Global Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine Market, Segmentation by Dose Pack Size:

Small Pack (Below 20 Doses per Vial)

Medium Pack (20–50 Doses per Vial)

Large Pack (Above 50 Doses per Vial)

Global Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live

Vaccine Market, Segmentation by Application:

Large-scale Integrated Pig Farming Groups

Breeding and Multiplier Farms

Animal Disease Control Institutions

Others

Companies Profiled:

Dahuanong Animal Health

Zoetis

Jilin Teyan Biotechnology

Qingdao Yebio Bioengineering

Sinopharm Yangzhou Vac Biological Engineering

Pulike Biological Engineering

Guangdong WINSUN Bio-pharmaceutical

Sinovetah Biological Pharmaceutical

TECON Pharmaceutical

Harbin Veken Biotechnology

CAHIC

Huapai Biotechnology Group

Chengdu Shiji Biological Pharmaceutical

Jilin Heyuan Biotechnology

Key Questions Answered:

1. How big is the global Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine market?
2. What is the demand of the global Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine market?
3. What is the year over year growth of the global Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine market?
4. What is the production and production value of the global Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine market?
5. Who are the key producers in the global Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine market?
6. What are the growth factors driving the market demand?

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