

# Global Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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## Abstracts

According to our (Global Info Research) latest study, the global Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine market size was valued at US\$ 15.85 million in 2025 and is forecast to a readjusted size of US\$ 21.08 million by 2032 with a CAGR of 4.1% during review period.

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 is a detailed and comprehensive analysis for global Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

#### Key Features:

Global Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine market size and forecasts, in consumption value (\$ Million), sales quantity (K Dose), and average selling prices (US\$/Dose), 2021-2032

Global Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Dose), and average selling prices (US\$/Dose), 2021-2032

Global Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K Dose), and average selling prices (US\$/Dose), 2021-2032

Global Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine market shares of main players, shipments in revenue (\$ Million), sales quantity (K Dose), and ASP (US\$/Dose), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

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, sales quantity, revenue, 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.

## Market Segmentation

Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

## Market segment by Type

JXA1-R Strain Live Vaccine

TJM-F92 Strain Live Vaccine

GDr180 Strain Live Vaccine

Others

### Market segment by Product Combination

Monovalent HP-PRRS Live Vaccine

Bivalent Vaccine Containing HP-PRRS Component

Others

### Market segment 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)

### Market segment by Application

Large-scale Integrated Pig Farming Groups

Breeding and Multiplier Farms

Animal Disease Control Institutions

Others

### Major players covered

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

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine, with price, sales quantity, revenue, and global market share of Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine from 2021 to 2026.

Chapter 3, the Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine.

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