

# Global Highly Pathogenic PRRS Live Vaccine Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Highly Pathogenic PRRS Live Vaccine market size is expected to reach \$ 20.43 million by 2032, rising at a market growth of 4.1% CAGR during the forecast period (2026-2032).

Highly Pathogenic PRRS Live Vaccine is a modified live swine vaccine used for the prevention of highly pathogenic porcine reproductive and respiratory syndrome, 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, stable batch-release capabilities, mature cell culture processes and strong service capabilities for large-scale pig farms. This is not a globally widespread mass-market vaccine category, but a product segment closely linked to China's highly pathogenic porcine blue ear disease control system, veterinary drug registration framework and practical immunization programs in commercial swine production. Competition is not driven only by price and distribution channels, but also by product safety, batch consistency, field application experience, cold-chain assurance and the supplier's ability to support vaccination programs for farms with different herd health statuses. Demand shows clear structural differentiation. Large-scale pig farming groups and breeding farms place more emphasis on immunization safety, product consistency, strain relevance and long-term supply stability, so their purchasing decisions are generally more cautious. Commercial pig farms and small to medium-sized producers rely more on distributors, regional veterinary service networks and local disease pressure, and are relatively more price-sensitive. As swine farming becomes more consolidated, vaccine suppliers need to move beyond simple product sales and provide vaccination program design, antibody monitoring, herd stabilization management and integrated disease-control advice to strengthen customer stickiness and product value. Future development will focus more on safety improvement, process upgrading, combination vaccines and precision immunization. Traditional modified live vaccines still have advantages in immunogenicity, accumulated field experience and end-user acceptance, but their use will become more cautious in high-health-status farms and production systems pursuing PRRS elimination. Suspension culture can help improve production consistency and scale-up efficiency, heat-stabilized formulations can enhance storage and transportation stability, and combination vaccines can simplify immunization programs. As circulating PRRSV strains continue to evolve, companies also need stronger epidemiological monitoring and clinical validation capabilities to support product iteration and differentiated competition. The main growth drivers include the rising share of large-scale farming, continued investment in major swine disease control, more standardized veterinary vaccine regulation, improvement in farm biosecurity systems and stronger service capabilities among leading suppliers. Key constraints include hog price cycles affecting vaccination budgets, reduced use of live vaccines in some farms pursuing disease elimination, safety concerns related to modified live vaccines, uncertainty in protection caused by regional strain differences, and cost pressure from cold-chain logistics and batch quality control. Overall, this market is more stable and structurally adjusting than high-growth. Future growth will depend less on capacity expansion and more on product quality upgrades, customer

concentration and stronger integrated service capabilities among leading companies.

This report studies the global Highly Pathogenic PRRS Live Vaccine production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Highly Pathogenic PRRS 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 PRRS Live Vaccine that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Highly Pathogenic PRRS Live Vaccine total production and demand, 2021-2032, (K Dose)

Global Highly Pathogenic PRRS Live Vaccine total production value, 2021-2032, (USD Million)

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

Global Highly Pathogenic PRRS Live Vaccine consumption by region & country, CAGR, 2021-2032 & (K Dose)

U.S. VS China: Highly Pathogenic PRRS Live Vaccine domestic production, consumption, key domestic manufacturers and share

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

Global Highly Pathogenic PRRS Live Vaccine production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Dose)

Global Highly Pathogenic PRRS Live Vaccine production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Dose)

This report profiles key players in the global Highly Pathogenic PRRS 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 Biopharmaceutical, 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 PRRS 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 PRRS Live Vaccine Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Highly Pathogenic PRRS Live Vaccine Market, Segmentation by Type:

JXA1-R Strain Live Vaccine

TJM-F92 Strain Live Vaccine

GDr180 Strain Live Vaccine

Others

Global Highly Pathogenic PRRS Live Vaccine Market, Segmentation by Product Combination:

Monovalent Live Vaccine

Combination Live Vaccine

Global Highly Pathogenic PRRS 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 PRRS 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 PRRS Live Vaccine market?
2. What is the demand of the global Highly Pathogenic PRRS Live Vaccine market?
3. What is the year over year growth of the global Highly Pathogenic PRRS Live Vaccine market?
4. What is the production and production value of the global Highly Pathogenic PRRS Live Vaccine market?
5. Who are the key producers in the global Highly Pathogenic PRRS Live Vaccine market?
6. What are the growth factors driving the market demand?

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