

Global Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine Market Growth 2026-2032

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Abstracts

The global Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine market size is predicted to grow from US\$ 15.07 million in 2025 to US\$ 20.34 million in 2032; it is expected to grow at a CAGR of 4.4% from 2026 to 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.

LP Information, Inc. (LPI) ' newest research report, the "Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine Industry Forecast" looks at past sales and reviews total world Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine sales in 2025, providing a comprehensive analysis by region and market sector of projected Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine sales for 2026 through 2032. With Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine industry.

This Insight Report provides a comprehensive analysis of the global Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine.

This report presents a comprehensive overview, market shares, and growth

opportunities of Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

JXA1-R Strain Live Vaccine

TJM-F92 Strain Live Vaccine

GDr180 Strain Live Vaccine

Others

Segmentation by Product Combination:

Monovalent HP-PRRS Live Vaccine

Bivalent Vaccine Containing HP-PRRS Component

Others

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)

Segmentation by Application:

Large-scale Integrated Pig Farming Groups

Breeding and Multiplier Farms

Animal Disease Control Institutions

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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 Addressed in this Report

What is the 10-year outlook for the global Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine market?

What factors are driving Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine market opportunities vary by end market size?

How does Highly Pathogenic Porcine Reproductive and Respiratory Syndrome Live Vaccine break out by Type, by Application?

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