

Global Highly Pathogenic PRRS Live Vaccine Market Growth 2026-2032

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Abstracts

The global Highly Pathogenic PRRS Live Vaccine market size is predicted to grow from US\$ 14.67 million in 2025 to US\$ 19.71 million in 2032; it is expected to grow at a CAGR of 4.4% from 2026 to 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.

LP Information, Inc. (LPI) ' newest research report, the "Highly Pathogenic PRRS Live Vaccine Industry Forecast" looks at past sales and reviews total world Highly Pathogenic PRRS Live Vaccine sales in 2025, providing a comprehensive analysis by region and market sector of projected Highly Pathogenic PRRS Live Vaccine sales for 2026 through 2032. With Highly Pathogenic PRRS 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 PRRS Live Vaccine industry.

This Insight Report provides a comprehensive analysis of the global Highly Pathogenic PRRS 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 PRRS 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 PRRS Live Vaccine market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Highly Pathogenic PRRS 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 PRRS Live Vaccine.

This report presents a comprehensive overview, market shares, and growth opportunities of Highly Pathogenic PRRS 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 Live Vaccine

Combination Live Vaccine

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 PRRS Live Vaccine market?

What factors are driving Highly Pathogenic PRRS Live Vaccine market growth, globally and by region?

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

How do Highly Pathogenic PRRS Live Vaccine market opportunities vary by end market size?

How does Highly Pathogenic PRRS Live Vaccine break out by Type, by Application?

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