

China Human Vaccine Industry Report, 2015-2018

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Abstracts

A vaccine is a preventive biological product for human use that prevents and controls the occurrence and prevalence of infectious diseases, so the demand for such products is relatively rigid. Due to suspected deaths stemming from vaccination and some companies' (such as Shenzhen Kangtai, Tiantan Biological and Dalian Hissen) production halts of some products because of their failure to pass new GMP certification, China's human vaccine lot release volume in 2014 declined by 2.4% year on year to 791 million doses.

Affected by China's less-developed economy, existing national vaccine prevention policies and people's awareness of epidemic prevention, free EPI vaccines prevail in China with a share of about 80% in the total lot release volume. Chinese free human vaccine market is still dominated by Beijing Tiantan Biological Products, Chengdu Institute of Biological Products Co., Ltd., Shanghai Institute of Biological Products Co., Ltd., Lanzhou Institute of Biological Products Co., Ltd., Wuhan Institute of Biological Products Co., Ltd., Changchun Institute of Biological Products Co., Ltd., Institute of Medical Biology under Chinese Academy of Medical Sciences and other state-owned enterprises, but their market shares are falling. In 2014, the EPI vaccine lot release volume of Chinese state-owned enterprises accounted for 72%, down 6.5 percentage points compared with the previous year.

However, as China gradually relaxes control over the vaccine market, private companies and foreign players are emerging in market segments of extra EPI vaccine, with their proportions increasing constantly, accounting for 80% in terms of lot release volume. Moreover, private and foreign brands hold a dominant position in the markets of Haemophilus influenza B (Hib), human rabies vaccine, varicella vaccine, and influenza vaccine, together making up 91.9%, 83.6%, 86.5%, and 69.5% in terms of lot release volume in 2014.

Being bullish about China's demand for human vaccines and exports, many vaccine producers scale up efforts in vaccine R&D or expand capacity, such as Walvax Biotechnology. By early 2015, GMP on-site certification had been carried out for the company's Diphtheria-tetanus-acellular pertussis combined vaccine adsorbed; HPV bivalent (types 16 and 18) vaccine and DTaP/Hib had made their way into clinical trials; the company is applying registration for meningococcal polysaccharide vaccine (Group A/C/Y/W 135) and other vaccines in Nigeria, Chile, Peru, Thailand, and India.

China Human Vaccine Industry Report, 2015-2018 highlights the following:

Operating environment, overall situation, sales channel, etc. of China human vaccine industry;

Supply & demand, competitive landscape, import & export, and development forecast of the Chinese human vaccine market;

Supply & demand, competitive landscape, and market prices of 10 product segments (including hepatitis B vaccine, influenza vaccine, rabies vaccine, and pneumococcal vaccine) in China;

Operation, vaccine business, and development prospects of 16 Chinese human vaccine companies.

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