

Research Report on China Foot-and-Mouth Disease (FMD) Vaccine Industry, 2010-2019

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Abstracts

Description

Picornavirus, the prototypic member of the genus Aphthovirus, is the virus responsible for FMD. And it has seven serotypes with different antigenicity. The disease is characterized by high fever that declines rapidly after two or three days, blisters inside the mouth that lead to excessive secretion of stringy or foamy saliva and to drooling, and blisters on the feet that may rupture and cause lameness. Adult animals may suffer weight loss from which they do not recover for several months, as well as swelling in the testicles of mature males, and in cows, milk production can decline significantly. Though most animals eventually recover from FMD, the disease can lead to myocarditis and death, especially in newborn animals. Some infected ruminants remain asymptomatic carriers, but they nonetheless carry FMDV and may be able to transmit it to others.

The transmission of FMD is generally regional. The FMD virus can be transmitted in a number of ways including close-contact animal-to-animal spread, or inanimate objects, typically stall and vehicles. The clothes and skin of animal handlers such as farmers, standing water and uncooked food scraps and feed supplements containing infected animal products can harbor the virus, as well. Cows can also catch FMD from the semen of infected bulls. Control measures include quarantine and destruction of infected livestock, and export bans for meat and other animal products to countries not infected with the disease.

As the world's largest pork producer and consumer, China contributes to nearly half of the total production. In 2014, meat production in China totaled 87.07 million tons, increasing 2.0% year on year. Specifically, pork production was 56.71 million tons with a year-on-year growth of 3.2%, beef production 6.89 million tons with a year-on-year

growth of 2.4%, mutton production 4.28 million tons with a year-on-year growth of 4.9% and poultry production 17.51 million tons with a year-on-year decrease of 2.7%. In 2014, pig stocks amounted 465.83 million, decreasing 1.7% year on year while the number of pigs ready for slaughter reached 735.10 million, increasing 2.7% year on year. The outbreak of type A FMD happened in Guangdong, Henan and Anhui in 2012, Guangxi and Guangdong in 2013 and showed a South-to-North picture in 2014 autumn and winter, influencing such regions as Xizang, Guangxi, Jiangxi, Anhui, Shandong. And 2015 also witnessed many reports of FMD in China too. Therefore, getting livestock such as pig, cattle and sheep vaccinated is very necessary.

According to the 2015 National Compulsory Immunization Program of Animal Disease issued by the Ministry of Agriculture of the People's Republic of China, compulsory vaccines for four animal diseases like FMD are funded by the government. Currently, the Chinese government invites bids for FMD vaccine before purchasing. Driven by intensive farming, big farms' demand for customized vaccine keeps growing, which leads to the fastened marketization of vaccine. Besides, as direct selling features high technological barrier and few enterprises, there is not much competition in the market, leading to a high profit.

As the Chinese government has begun to emphasize the quality of compulsory vaccine, the bidding of such vaccines as FMD vaccine in Guangdong, Fujian and Shandong has implemented since 2013 the strategy of high quality at a favorable price. And it is estimated that procurement standards for compulsory vaccine will rise and so do their price.

As Chinese economy develops, people's living standards keep rising, so do their demands for meat and dairy products. This stimulates the development of stock raising and the demand for FMD vaccine.

The market size of FMD vaccine is expected to keep growing in China with a rate of over 20%.

Readers can get at least the following information through this report:

occurrence of FMD

stock raising industry in China

policy environment and government purchase of FMD vaccine in China

supply of and demand for FMD vaccine in China

major producers of FMD vaccine and their operation status in China

factors affecting development of FMD vaccine in China

expectation to FMD vaccine industry in China

The author suggests the following groups of people purchase this report:

enterprises engaged in animal vaccine production and trade

breeding enterprises

regulatory agencies of stock raising

investors/ research institutions interested in FMD vaccine industry

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COMPANIES MENTIONED

CAHIC; The Spirit Jinyu Biological Pharmaceutical Co., Ltd; TECON; China Agricultural Vet.Bio. Science and Technology Co., Ltd; Inner Mongolia Bi Wei Antai Biological Technology Co., Ltd; Shen Lian Biotechnology Co., Ltd; QYH Biotech Co., Ltd

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