

Research Report on China Human Vaccine Industry, 2011-2020

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Abstracts

Description

Currently vaccination is one of the most effective approaches to prevent the spread of infectious diseases as well as one of the most cost-effective health intervention measures. Vaccination is helpful to trim down large amount of treatment expense.

The research object of the report is human vaccine apart from animal vaccine. Five pharmaceutical giants, MSD, Sanofi, Glaxo SmithKline, Pfizer and Novartis, take up significant share of the global market, with sales volume of over 80% globally. Yet in terms of vaccine output, these five giants totally produce less than 20% of the global output, meaning most of the vaccines are produced by manufacturers in the developing world.

There are more than 30 vaccine manufacturing companies in China so far. They are capable of producing over 40 varieties of vaccines to prevent more than 20 infectious diseases. Compared with the international market, vaccine manufacturing companies in China have a larger total number yet a smaller individual scale.

In China, it is used to classifying vaccines into two catalogues: Vaccine I and Vaccine II. Vaccine I refers to those free vaccines provided by the government for the public, including vaccines against major epidemic diseases such as hepatitis B, epidemic meningitis and tetanus. Vaccines in this category are all priced by the government and purchased through bidding. Vaccine II mainly covers vaccines paid by citizens themselves. For Vaccine II, pricing falls into the hand of companies, thus offering a higher profit margin and yet forming a more fiercely competitive market. Some of the commonly used vaccines in the Vaccine II catalogue include Pneumonia Vaccine,

Varicella Vaccine, Type B Haemophilus Influenzae Conjugate Vaccine, Influenza Vaccine and Rabies Vaccine. In China, Vaccine I market is dominated by state- owned enterprises. Foreign and private enterprises gain certain advantages in the Vaccine II market.

In 2015, vaccine market size in China had a value of about CNY 21 billion. During the corresponding period, however, the whole pharmaceutical market in China reached a scale of over CNY 2,000 billion. Sales of vaccine industry took up only about 1% of the whole pharmaceutical industry, much lower than the average 3% of the global market. Therefore, China's vaccine market still has much room for growth. China is a country with the largest population in the world. Every year newly born babies exceed 10 million yet meanwhile aging population is witnessing a trend of rise. As the economy advances, movement of population in China is frequent, which objectively adds to the wider and faster spread of diseases globally. Outbreaks of new epidemic diseases (such as Avian Influenza, Type A H1N1 Influenza) are more frequent.

Thanks to the technology accumulation over the years, some of China's private enterprises have gained significant breakthroughs in both the technological field and the market of Vaccine II. However, as the majority of them produce their products through copy and imitation, they are in lack of strength in core technology, manufacturing technique, innovation and competence.

In China, as some problems still remain in the supervision and regulation in human vaccine industry, related accidents pop up constantly. This makes some Chinese residents tend to choose imported vaccines. The huge potential of China's human vaccine industry attracts international giants in vaccine industry to speed up their entry to Chinese market. In 2009 Novartis offered to purchase 85% shares of Zhejiang Tianyuan Bio- Pharmaceutical Co., Ltd. at USD 125 million. Such a bid was approved in March 2011. In June 2011, Glaxo SmithKline bought 51% shares of Neptunus Interlong held by Neptunus Pharmaceutical at GBP 24 million and set up a joint- venture subsidiary. In September 2011, Glaxo SmithKline signed with three new partners which were Sinopharm Group Co., Ltd., Shanghai Zuellig Pharmaceutical Co., Ltd. and Beijing Keyuan Xinhai Pharmaceutical Co., Ltd. The three distributors were respectively responsible for the distribution business in Northern, Central and Southern China. Through their cold chain logistics systems around the nation, they can provide services for clients in different parts of China.

It is estimated that China's vaccine market will still grow at a fast speed in the next few years. However as market competition is getting more intensified, some of the

incompetent companies will end up in bankruptcy or be acquired and restructured.
Market concentration rate will constantly go up.

Currently as vaccination rate in China is relatively low, growth in the industry in the future will be large. As China's economy develops further, residents' health awareness and paying capacity will continue to be improved, which will offer greater opportunities and market for the vaccine industry.

Through this report, readers can acquire the following information or even more:

Status of China Vaccine Industry

Government Policy of China Vaccine Industry

Competition Status of China Vaccine Market

Segmentation of China Vaccine Market

Major Vaccine Manufacturers in China

Development Trend of Vaccine Market

The following enterprises and people are proposed to purchase this report:

Vaccine Manufacturers

Medical and Anti- epidemic Institutions

Research Institutions/Investors Concerned about Vaccine Industry

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