

Research Report on China Porcine Reproductive and Respiratory Syndrome (PRRS) Vaccine Industry, 2017-2021

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Abstracts

DESCRIPTION

Porcine reproductive and respiratory syndrome (PRRS) is an epidemic disease caused by porcine reproductive and respiratory syndrome virus (PRRSV). PRRS causes reproductive failure in breeding stock such as abortions and giving birth to stillborn, dyspnea in young pigs and sepsis. Mortality of sows and piglets of acute onset is above 40% while mortality of chronic onset is very low. Symptoms of chronic onset include respiratory tract illness and decrease of immune function and reproduction ability. At present, PRRS attacks in China's large-scale pig farms are mainly chronic PRRS.

According to CRI, animal vaccines are mainly classified into nation-planned compulsory immunity vaccines and non-compulsory immunity vaccines (commercial vaccines) in China. Most of the compulsory vaccines are purchased by the government at a lower price, which are distributed to pig farmers for free and are of poor quality. Partial large-scale farms have high requirements for animal vaccines, so they generally purchase high-quality vaccines from animal vaccine enterprises directly. Generally speaking, prices of PRRS vaccines for government procurement are only 10% that of commercial vaccines.

According to CRI, China is the largest pork producer and consumer in the world, accounting for nearly half of the global total output volume of pork. In 2016, output volume of pork was about 53 million tons in China, and the sales volume of hogs was about 685 million heads. In 2007, Ministry of Agriculture of China issued Technical Standards of Prevention and Treatment of Highly-pathogenic PRRS, including highly-pathogenic PRRS vaccines into national compulsory immunization plan. In 2016,

Ministry of Agriculture of China claimed that compulsory immunization of highly-pathogenic PRRS was not to be implemented temporarily. In 2017, national compulsory immunization plan of PRRS was abandoned officially in National Compulsory Immunization Plan of Animal Epidemic Diseases, 2017.

According to CRI, China's PRRS Vaccine market is fiercely competitive in terms of the competition pattern. By June, 2017, there are about 30 PRRS vaccine producers, among which there are about 10 public companies. Major domestic manufacturing enterprises include Shanghai Hile Bio-pharmaceutical Co., Ltd., China Animal Husbandry Industry Co., Ltd., Qilu Animal Health Products Co., Ltd. and Harbin Weike Biotechnology Co., Ltd. in China's PRRS vaccine market. Boehringer Ingelheim Group is the major foreign-funded enterprise.

According to CRI, the market size declined by over 30% in 2016 compared to that in 2015 as the Chinese government no longer purchases PRRS vaccines since 2016. From the short run (within 3 years), exit of government procurement will cause declining sales volume of vaccines and shrinking market size to China's PRRS vaccine market. High price of commercial vaccines is the major cause. It is likely that small-scale farmers (with annual sales volume of no more than 200 heads) will not immunize pigs after PRRS vaccines are not included in government compulsory immunization plan in order to save the cost. Small-scale pig farmers still account for a large proportion of the total pig farmers at present.

It is estimated that the market size of PRRS vaccines will shrink in short term after the abandon of compulsory immunization (within 3 years). However, from the long run, small-scale farmers will gradually withdraw from market and the proportion of large-scale farms with annual sales volume of over 5,000 heads is growing as the cost of hog breeding keeps growing in China. These large-scale pig farms are the major driving forces in China's PRRS vaccine market as 95% of them will purchase commercial PRRS vaccines.

According to CRI, demand for pork will keep growing with the development of China's economy and the improvement of livelihood of Chinese residents, promoting the development of hog breeding industry. It is estimated that market size of PRRS vaccines will be smaller during 2017-2018 due to the termination of government procurement. However, with the rapid growth of the commercial PRRS vaccine market in China, the market size will increase again in 2019.

Readers can acquire the following information or more through this report:

Incidence Status of Porcine Reproductive and Respiratory Syndrome

Overview of China Hog Breeding Industry

Policy Environment and Historical Government Procurement of PRRS Vaccines in China

Supply and Demand Status of PRRS Vaccines in China

Major Manufacturing Enterprises of PRRS Vaccines and their Operation Status in China

Competition Status of PRRS Vaccine Market in China

Market Opportunities and Driving Forces of PRRS Vaccine Market in China

Threats and Challenges Confronted by PRRS Vaccine Market in China, 2017-2021

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- 12 Guangdong Wens Food Group Co., Ltd.
- 13 Qingdao Yebio Bioengineering Co., Ltd.
- 14 Xinjiang Tecon Animal Husbandry Bio-Technology Co., Ltd.

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