

# Research Report on Global and China Human Vaccine Industry, 2013-2017

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## Abstracts

The research object of the report is human vaccines. According to different types and sources, vaccines can be divided into pathogenic protein vaccine, recombinant protein vaccines, immune protein vaccines and gene vaccines.

In China, vaccines are generally divided into Vaccine I and Vaccine II. Vaccine I is offered for free, and it's priced and purchased uniformly by the government, covering the major epidemic diseases of Hepatitis B, epidemic cerebrospinal meningitis, Tetanus, etc. Vaccine II is other vaccines inoculated voluntarily at residents' own expense. It is independently priced and has large profit margins, but there are intense competition in the market. The frequently-used Vaccine II includes Pneumonia vaccine, Varicella Vaccine, Type B Haemophilus Influenzae Conjugate Vaccine, Influenza Vaccine, Rabies Vaccine and so on. In China, Vaccine I market are occupied by state-owned enterprises, while foreign-funded enterprises and private enterprises have certain advantages in Vaccine II market.

In 2012, the scale of Chinese vaccine market was about CNY 19 billion, while the scale of pharmaceutical industry was about CNY 1.78 trillion in the same period. The sales revenue of Chinese vaccine industry was only about 1% of that of the pharmaceutical industry far below the global average level of 3%, estimated by CRI. There is still much space for growth. China has the largest population in the world with 10 million newborns yearly. Meanwhile, the aging of the society is increasingly serious. With the economic development and increasingly frequent population immigrations, it inevitably widens the spreading range and increases the speed of disease spreading. Accordingly, new epidemic diseases (Avian Influenza, Influenza A H1N1 and so on) occur frequently.

Data from China's Ministry of Health shows, in 2012, China reported 3,216,900 cases of

Class A and B infectious diseases, with 16,721 dead. The reported incidence of Class A, B infectious diseases is 238.76/0.1 million and the death rate is 1.24/0.1 million. In 2012, China reported 3,734,500 cases of Class C infectious diseases, with 594 dead. The reported incidence of Class C infectious diseases is 277.18/0.1 million and the death rate is 0.04/0.1 million. China's infectious disease incidence reflects a growing trend comparing with that in previous years, which gradually prompts government's attention on prevention and control of infectious diseases and planned immunization coverage is expanding; public awareness of vaccination is also increasing continuously which promotes the growth of vaccine market.

In China, there are over 30 human vaccine manufacturing enterprises with annual production of over 1 billion including about 40 kinds of vaccines against more than 20 kinds of viruses. With years of technological accumulation, some private vaccine enterprises make big breakthrough in the technical fields and Vaccine II market.

The great potential demand of China's human vaccine market attract many leading enterprises of international vaccine industry to speed up the layout in China. In 2008, Sanofi Pasteur invested USD 94 million to build vaccine factories in Shenzhen. In 2009, Novartis bought 85% of shares of Zhejiang Tianhua Co., Ltd. at the cost of USD 125 million which was approved in March 2011. In May 2011, GSK ended the cooperation with Watson Biological Company; in June it bought 51% shares of Haiwang Yingtelong Biotechnology Co., Ltd. at the cost of GBP 24 million and established wholly-owned subsidiary company. In September 2011, GlaxoSmithKline signed contracts with Sinopharm, Shanghai Zuellig Pharmaceutical Co., Ltd. and Beijing Keyuan Pharmaceutical Co., Ltd. The three distributors are responsible for the business of North China, Central China and South China respectively and provide services for customers through the cold chain logistics system covering all over the country.

CRI forecasts that China vaccine market will maintain a rapid growth in the future years, but the competition will be fiercer. Some less competitive enterprises will go bankrupt or be merged and reorganized, and the concentration rate of vaccine market will rise continually.

Due to the low vaccination rate in China, there's much space for future growth. With the increase of China's income per capita, residents' health awareness and their ability to pay, the vaccine market will get more opportunities and shares.

More following information can be acquired through this report:

Vaccine Industry of China and the World

Government Policies on China Vaccine Industry

Competition in China Vaccine Market

Major Segmentation of China Vaccine Market

Development Trend of China Vaccine Market

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## Contents

### **CHAPTER 1 BASIC CONCEPT OF HUMAN VACCINE INDUSTRY**

- 1.1 Definition
- 1.2 Development Course of Vaccines
- 1.3 Classification of Vaccines
- 1.4 Necessity of Vaccination

### **CHAPTER 2 ANALYSIS ON GLOBAL VACCINE MARKET, 2008-2012**

- 2.1 Scale and Structure of Global Vaccine Market
  - 2.1.1 Scale of Global Vaccine Market
  - 2.1.2 Major Application Groups of Vaccines
  - 2.1.3 Structure of Global Vaccine Market
- 2.2 Vaccines for Children
  - 2.2.1 Major Varieties
  - 2.2.2 Market Scale of Vaccines for Children
- 2.3 Vaccines for Adults
  - 2.3.1 Varieties of Vaccines for Adults
  - 2.3.2 Market Scale of Vaccines for Adults

### **CHAPTER 3 DEVELOPMENT ENVIRONMENT OF CHINA VACCINE INDUSTRY, 2012-2013**

- 3.1 Economic Environment
- 3.2 Policy Environment
  - 3.2.1 History of China's Immunization Program
  - 3.2.2 Procedure of Immunization Program
- 3.3 Relevant Legislation and Criterion of China Vaccine Industry
  - 3.3.1 Research and Registration Stage
  - 3.3.2 Production Stage
  - 3.3.3 Circulation Stage
  - 3.3.4 Supporting Policies of Chinese Government on Vaccine Industry

### **CHAPTER 4 ANALYSIS ON CHINA'S HUMAN VACCINE MARKET, 2008-2012**

- 4.1 Classification of Vaccines in China
- 4.2 Scale of China Vaccine Market

- 4.2.1 Overview
- 4.2.2 Structure of China Vaccine Market
- 4.3 Segmentation of China Vaccine Market
  - 4.3.1 Vaccine I Market
  - 4.3.2 Vaccine II Market
- 4.4 Analysis on Major Vaccines in China
  - 4.4.1 Bacillus Calmette-Guerin
  - 4.4.2 Poliomyelitis Vaccine
  - 4.4.3 Measles-Mump-Rubella Vaccine
  - 4.4.4 Diphtheria and Tetanus (DTP or DTaP) Vaccine
  - 4.4.5 Encephalitis Vaccine
  - 4.4.6 Meningococcus Vaccine
  - 4.4.7 Human Rabies Vaccine
  - 4.4.8 Type B Haemophilus Influenzae Conjugate Vaccine
  - 4.4.9 Influenza Vaccine
  - 4.4.10 Varicella Vaccine
  - 4.4.11 Hepatitis A Vaccine
  - 4.4.12 Pneumococcus Vaccine
  - 4.4.13 Hepatitis B Vaccine

## **CHAPTER 5 CHINA'S MAJOR VACCINE MANUFACTURERS**

- 5.1 China National Biotec Group (CNBG)
  - 5.1.1 Overview
  - 5.1.2 Subordinate Biological Products Institutions
- 5.2 Hualan Biological Engineering Co., Ltd.
- 5.3 Beijing Tiantan Biological Products Co., Ltd.
- 5.4 Changchun High-Tech Industry (Group) Co., Ltd.
- 5.5 Haiwang Yingtelong Biotechnology Co., Ltd.
- 5.6 Other Enterprises

## **CHAPTER 6 PREDICTION ON DEVELOPMENT OF CHINA VACCINE INDUSTRY**

- 6.1 Prediction on Supply and Demand
  - 6.1.1 Prediction on Production
  - 6.1.2 Prediction on Market Scale
- 6.2 Prediction on Development Trend
  - 6.2.1 Technology Trend
  - 6.2.2 Market Trend

### 6.2.3 Competition Trend

## Selected Charts

### SELECTED CHARTS

Chart Introduction on Basic Ingredients of Vaccines  
Chart Classification of Human Vaccines  
Chart Comparison Between Traditional and New Vaccines  
Chart Scale of Global Vaccine Market, 2004-2012  
Chart Introduction on Major Vaccines in the World  
Chart Major Varieties of Pneumonia Vaccines in the World  
Chart Major Hepatitis Vaccines in Global Market  
Chart World's Major Infectious Diseases Since the 21st century  
Chart Market Scale of China Vaccine Industry, 2005-2012  
Chart Lot Release Quantity of BCG Vaccine in China, 2010-2012  
Chart Market Scale of MMR Vaccine in China, 2010-2012  
Chart Lot Release Quantity of Human Rabies Vaccine in China, 2010-2012  
Chart Lot Release Quantity of Influenza Vaccine in China, 2010-2012  
Chart Prediction on Market Scale of China Vaccine Industry, 2013-2017  
Chart Immunization Program Procedure for Chinese Children  
Chart Circulation of Vaccines in China  
Chart Prediction of China Vaccine Market Scale, 2013-2017

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