

Research Report on Chinese Human Vaccine Industry, 2012

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Abstracts

The research object of the report is human vaccine apart from animal vaccine. Vaccination is the most economical, effective, safe and convenient way to prevent disease and the investment of vaccination is far more less than that of the treatment. Hence, it is of significance to make great contribution to save social resources.

In China, vaccine is customarily divided into vaccine I and Vaccine II. Vaccine I is offered for free, and it's priced and purchased uniformly by government, covering the major epidemic diseases of Hepatitis B, Idemic Encephalitis, Tetanus, etc. Vaccine II is that vaccine which is inoculated voluntarily at people's own expense. It is independently priced and has large profit margins, but there are intense competitions 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 markets are occupied by state-owned enterprises, while foreign-funded enterprises and private enterprises have certain advantages in Vaccine II markets.

Because of the low per capital income and the lack of medical guarantee, the market scale of Chinese Vaccine is relatively small. However, driven by many factors, it has good market prospects.

In 2011, the scale of Chinese vaccine market was about CNY 15 billion, while the scale of pharmaceutical industry was about CNY 1.45 trillion in the same period. The sales revenue of Chinese vaccine industry was only about 1% of that of the pharmaceutical industry and it accounted for less than 3% of the global revenue in the same period. There is still much space for growth. China has the largest population in the world with 10 million newborns yearly. At the same time, the aging of the society is increasingly

serious. With the economic development and increasingly frequent population movements, it inevitably widens the spread ranges and enhances spreading of the diseases. Accordingly, new epidemic diseases (Avian Influenza, Influenza A H1N1 and so on) occur frequently. The data from China's Ministry of Health shows, from 2000 to 2009, the infectious disease incidence of China increased from 19.2 million/1 million to 47.13 million /1 million and the death rate increased from 36,000/1 million to 118,000/1 million in the same period. Chinese government attaches increasingly efforts to the prevention and cure of infectious disease and the planning immunization coverage is expanding. The increasingly awareness of vaccination impels the growth of vaccine industry.

In China, there are over 30 manufacturing enterprises of human vaccine with annual production of over 1 billion. As for years of technological accumulation, parts of private vaccine enterprises make big breakthrough in the technical fields and market of Vaccine II. However, the majority of them do generic development of the traditional vaccine, lacking of core technology, production technology, original research innovation and so on. As a result, they are less competitive.

The great demands of Chinese vaccine market attract many leading enterprises of international vaccine industry to invest. In 2008, Sanofi Pasteur invested USD 94 million to build vaccine factories. In 2009, Novartis bought 85% of shareholding of Zhejiang Tianhua Co., Ltd. at the cost of USD 125 million and was registered in March 2011. In May 2011, GSK ended the cooperation with Watson Biological Company, and in June, it bought 51% shareholding 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 the North China, the central parts and the South China respectively and provide services for customers through the cold chain logistics system covering all over the country.

In the next few years, it's expected, Chinese vaccine market will maintain a rapid growth, but the competition will be fiercer. Parts of less competitive enterprises will go bankrupt or be merged and reorganized, and the concentration rate of vaccine market will keep an increase.

More following information can be acquired through this report:

Vaccine Industry of China and the Global World

Government Policy of Chinese Vaccine Industry

Competition in Chinese Vaccine Market

Major Vaccine of Chinese Market

Development Trend of Chinese Vaccine Market

Operation of Major Enterprises of Chinese Vaccine Market

Following people are recommended to buy this report:

Vaccine Manufacturers

Vaccine Distributors

Research Institutions and Investors Focusing on Vaccine Industry

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