

China Chinese Patent Medicine Industry Report, 2010

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This report

- ◆ Analyzes the domestic & global operating environment, current development, supply & demand, competition pattern, import & export and market segments of China's Chinese patent medicine industry
- ◆ studies the operation and development prospect of 10 listed Chinese patent medicine enterprises, including Tasly, Kanion Pharmaceutical, Yunnan Baiyao, Tibet Cheezheng Tibetan Medicine, Tibet Rhodiola Pharmaceutical, Kunming Pharmaceutical, CONBA, Tongrentang and Guilin Sanjin.

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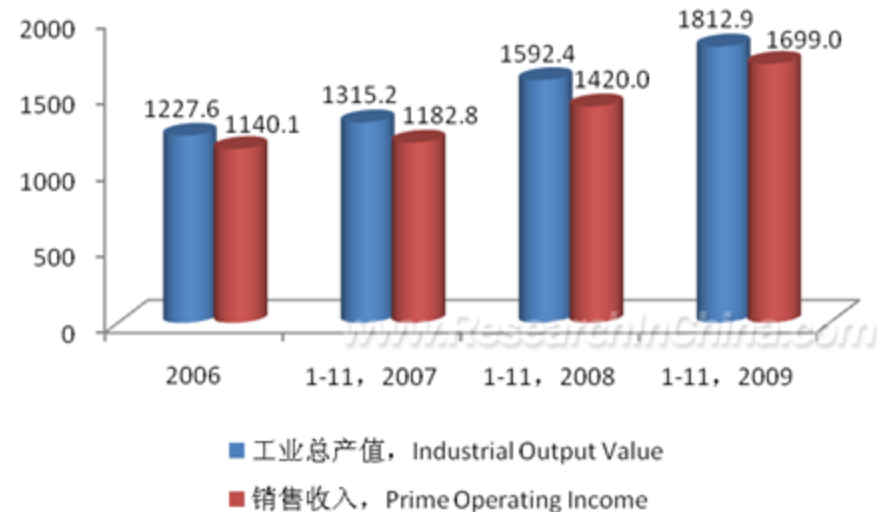
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Abstract

China is the birthplace of Chinese Patent Medicine, and a major producer and consumer of Chinese patent medicine in the world. Driven by both policy incentives and market demand, Chinese patent medicine has developed well in China. From 2006 to 2009, China's industrial output value and sales revenue of Chinese patent medicine grew at annual rates of 13.9% and 12.7% respectively. The terminal sales revenue of Chinese patent medicine has always accounted for about 30% of the total pharmaceutical revenue of China since 2006. As of August 2010, there had been 1,522 Chinese patent medicine manufacturers in China, including over 30 listed companies, such as Tasly, Tongrentang and Yunnan Baiyao; there had been over 10,000 kinds of Chinese patent medicine, such as Tasly's Compound Danshen Dripping Pill (Fu Fang Dan Shen Di Wan), Tongrentang's Bolus of Six Drugs Including Rehmannia (Liu Wei Di Huang Wan) and Bolus of Black-bone Chicken (Wu Ji Bai Feng Wan); there had been over 40 dosage forms, such as traditional bolus, ointment, powder and pellet as well as modern capsule, tablet and spray.

Industrial Output Value and Prime Operating Income of Chinese Patent Medicine in China, 2006-2009 (RMB bn)



Source: ResearchInChina; National Bureau of Statistics of China

As China's Chinese patent medicine has gained increasing International recognition and high profit (generally, the operating profit margin is above 70%), and the chemical and pharmaceutical industry has encountered development bottlenecks, global pharmaceutical giants and related institutions have marched into China's Chinese patent medicine-related fields through joint venture, sole proprietorship or other forms. For example, Novartis and Kunming Pharmaceutical signed a General Agreement on Patent Development Permit for the R & D and production of artemether raw materials, U.S. National Institutes of Health (NIH) (the world's largest medical research institute and research fund management institution) and Hutchison Whampoa Guangzhou Baiyunshan Chinese Medicine Company Limited signed a cooperative agreement on the research of anti-virus mechanism of Baiyunshan Radix Isatidis Granule.

Due to the particularity of Chinese patent medicine market, manufacturers generally can only set foot in some market segments instead of all application fields of Chinese patent medicine. Moreover, as there are a lot of manufacturers engaged in Chinese patent medicine, the competition among them is intense, and the market concentration is low even in market segments.

For example, in the field of Chinese patent medicine for cardiovascular and cerebrovascular diseases, top 4 brands accounted for 12.4%, 14.6% and 17.1% of the total market respectively during 2007 to 2009, while top 10 brands held 24.1%, 27.8% and 31.2% of the total market respectively during 2007 to 2009. However, the market concentration of Chinese patent medicine for cardiovascular and cerebrovascular diseases is showing an upward trend in China.

The report analyzes the domestic & global operating environment, current development, supply & demand, competition pattern, import & export and market segments of China's Chinese patent medicine industry. It also studies the operation and development prospect of 10 listed Chinese patent medicine enterprises, including Tasly, Kanion Pharmaceutical, Yunnan Baiyao, Tibet Cheezheng Tibetan Medicine, Tibet Rhodiola Pharmaceutical, Kunming Pharmaceutical, CONBA, Tongrentang and Guilin Sanjin.

1. Overview of Chinese Patent Medicine

- 1.1 Definition and Classification
- 1.2 Comparison among Chinese Patent Medicine, Herbal Medicine and Natural Medicine
- 1.3 Industry Chain

2. Market Operating Environment for China's Chinese Patent Medicine

- 2.1 Global Environment
 - 2.1.1 Policies
 - 2.1.2 Market Status
 - 2.1.3 Development Trend
- 2.2 Domestic Environment
 - 2.2.1 Policies
 - 2.2.2 Operation of TCM Industry

3. Overview of China's Chinese Patent Medicine Market

- 3.1 Status Quo
- 3.2 Supply and Demand
 - 3.2.1 Supply
 - 3.2.2 Demand
- 3.3 Competition
- 3.4 Import & Export
 - 3.4.1 Export
 - 3.4.2 Import
- 3.5 Development Prospect and Trend
 - 3.5.1 International Market
 - 3.5.2 Domestic Market
 - 3.5.3 Influence of Raw Materials

4. Chinese Patent Medicine Market Segments in China

- 4.1 Cardiovascular and Cerebrovascular
 - 4.1.1 Market Scale
- 4.2 Anti-tumor
- 4.3 Respiratory System

5. Major Chinese Patent Medicine Manufacturers in China

- 5.1 Tasly
 - 5.1.1 Profile
 - 5.1.2 Operation
 - 5.1.3 Development Prospect and Trend
- 5.2 Kanion Pharmaceutical
 - 5.2.1 Profile
 - 5.2.2 Operation
 - 5.2.3 Development Prospect and Advantages
- 5.3 Yunnan Baiyao
 - 5.3.1 Profile
 - 5.3.2 Operation
 - 5.3.3 Development Prospect and Advantages
- 5.4 Pien Tze Huang
 - 5.4.1 Profile
 - 5.4.2 Operation
 - 5.4.3 Development Prospect and Advantages
- 5.5 Tibet Cheezheng Tibetan Medicine
 - 5.5.1 Profile
 - 5.5.2 Operation
 - 5.5.3 Development Prospect and Advantages
- 5.6 Tibet Rhodiola Pharmaceutical
 - 5.6.1 Profile

- 5.6.2 Operation
- 5.6.3 Development Prospect and Advantages
- 5.7 Kunming Pharmaceutical
 - 5.7.1 Profile
 - 5.7.2 Operation
 - 5.7.3 Development Prospect and Advantages
- 5.8 CONBA
 - 5.8.1 Profile
 - 5.8.2 Operation
 - 5.8.3 Development Prospect and Advantages
- 5.9 Tongrentang
 - 5.9.1 Profile
 - 5.9.2 Operation
 - 5.9.3 Development Prospect and Advantages
- 5.10 Guilin Sanjin
 - 5.10.1 Profile
 - 5.10.2 Operation
 - 5.10.3 Development Prospect and Advantages

- Chinese Patent Medicine Industry Chain
- Distribution of global Herbal Medicine Market, 1999-2005
- Market Shares of Herbal Medicine Enterprises in the World, 2005
- Cases of Foreign Enterprises Entering the Field of Chinese Herbal Medicine
- National Policies Related with Chinese Patent Medicine
- Total Output Value of Traditional Chinese Medicine Industry and by Sub-sector, 2006-2009
- Industrial Output Value and Sales Revenue of Chinese Patent Medicine in China, 2006-2009
- Number of Chinese Patent Medicine Enterprises in China, 2006-Aug. 2010
- Chinese Patent Medicines Included in the Catalog of Essential Medicines and National Medical Insurance-covered Medicines of China by Category, 2009
- Output and Growth Rate of Chinese Patent Medicine in China, 2006-2009
- Output of Chinese Patent Medicine (by Region) in China, 2009
- Chinese Patent Medicine Terminal Sales Revenue and Its Proportion in Pharmaceutical Market in China, 2005-2009
- Product Structure of Chinese Patent Medicine Market (by Purpose and Effectiveness) in China, 2009
- China's Export Volume and Value of Chinese Patent Medicine, 2006-H1 2010
- Export Destinations of China's Chinese Patent Medicine, H1 2010
- China's Export Volume and Value of Chinese Patent Medicine by Product, H1 2010
- Top 10 Provinces by Export of Chinese Patent Medicine, H1 2010
- China's Import Volume and Value of Chinese Patent Medicine, 2007-H1 2010
- Countries and Regions Where China Imported Chinese Patent Medicine from, H1 2010
- Major Regions Where China Imported Chinese Patent Medicine from, H1 2010
- Gross Margin of Major Chinese Patent Medicine Enterprises in China, 2007-H1 2010
- Monthly Prices of Several Chinese Herbal Medicines in China, 2010
- Top 10 Brands of Chinese Patent Medicine for Cardio-cerebral-vascular Diseases in China, 2007-2009

- Proportion of Chemical Pharmaceutical to Chinese Patent Medicine in Chinese Anti-tumor Market, 2009
- Top 10 Brands of Chinese Patent Medicine for Anti-tumor and Immune Regulation in China, 2009
- Market Scale and Growth Rate of Chinese Patent Medicine (Granule) for Throat and Heat Expelling in China, 2006-2009
- Top 10 Brands of Chinese Patent Medicine for Throat in China, 2008
- Top 10 Brands of Chinese Patent Medicine (Granule) for Heat Expelling in China, 2008
- Operating Income and Total Profit of Tasly, 2007-H1 2010
- Operating Income of Tasly (by Industry), H1 2010
- Operating Income of Tasly (by Region), H1 2010
- Modern Traditional Chinese Medicine Industry Chain of Tasly
- Operating Income and Total Profit of Kanion Pharmaceutical, 2007-H1 2010
- Operating Income and Operating Profit Margin of Kanion Pharmaceutical (by Industry or Product), 2009-H1 2010
- Operating Income and Total Profit of Yunnan Baiyao, 2007-H1 2010
- Operating Income and Operating Profit Margin of Yunnan Baiyao (by Industry or Product), 2009-H1 2010
- Operating Income of Yunnan Baiyao (by Region), 2009-H1 2010
- Operating Income and Total Profit of Pien Tze Huang, 2007-H1 2010
- Operating Income and Operating Profit Margin of Pien Tze Huang by Product, 2007-H1 2010
- Operating Income of Pien Tze Huang (by Region), 2009-H1 2010
- Operating Income and Total Profit of Tibet Cheezheng Tibetan Medicine, 2007-H1 2010
- Operating Income and Operating Profit Margin of Tibet Cheezheng Tibetan Medicine (by Product), 2007-H1 2010
- Operating Income of Tibet Cheezheng Tibetan Medicine (by Region), 2009-H1 2010
- Operating Income and Total Profit of Tibet Rhodiola Pharmaceutical, 2007-H1 2010
- Operating Income and Operating Profit Margin of Tibet Rhodiola Pharmaceutical (by Product), 2009-H1 2010
- Operating Income and Total Profit of Kunming Pharmaceutical, 2007-H1 2010
- Operating Income and Operating Profit Margin of Natural Medicine of Kunming Pharmaceutical, 2007-H1 2010

- Operating Income of Kunming Pharmaceutical (by Region), 2009-H1 2010
- Operating Income and Total Profit of CONBA, 2007-H1 2010
- Operating Income and Operating Profit Margin of CONBA's Modern Herbal Medicine, 2007-H1 2010
- Operating Income of CONBA (by Region), 2009-H1 2010
- Operating Income and Total Profit of Tongrentang, 2007-H1 2010
- Operating Income and Net Profit of Subsidiaries of Tongrentang, 2009
- Operating Income of Tongrentang (by Region), 2009-2010
- Operating Income and Total Profit of Guilin Sanjin, 2007-H1 2010
- Operating Income and Operating Profit Margin of Guilin Sanjin (by Product), 2009-H1 2010
- Operating Income of Guilin Sanjin (by Region), 2009-H1 2010

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