



China Dietary Supplement Industry Report, 2011-2012

May 2012

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

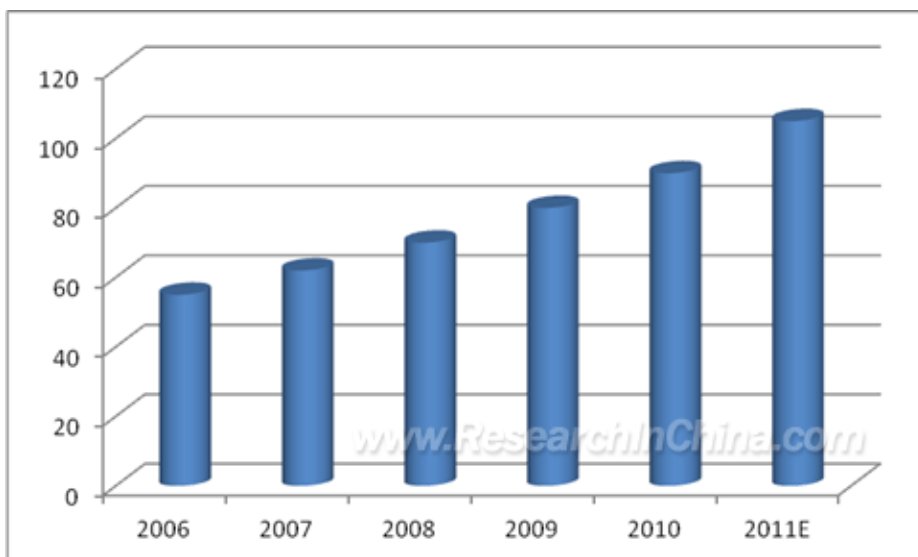
INFORMATION SOURCES

The primary information sources include NBS(National Bureau of Statistics of China), Health Food Association of China, and Nutrition Business Journal etc .

Abstract

In recent years, the dietary supplement industry has entered a new golden development stage in China, with the market size hitting RMB105 billion in 2011 and presenting a CAGR of 11.4% or so during 2006-2011.

Chinese Dietary Supplement Market Size, 2006-2011 (RMB bn)



Source: CHCA, ResearchInChina 'China Dietary Supplement Industry Report, 2011-2012'

Since the Ministry of Health of the People's Republic of China enforced the Examination and Approval System in 1996, according to the data of the State Food and Drug Administration (SFDA), China had approved 11,413 types of domestic dietary supplement and 656 types of imported dietary supplement by March 2012. In 2011, China examined and approved the registration of 813 types of dietary supplement (up 14.5% from 2010), including 800 types of domestic dietary supplement and 13 types of imported dietary supplement.

The report covers:

- ※ Development of global and China dietary supplement industry: industrial chain, status quo, market size, business models, competitive features and patterns, development trends;
- ※ Major dietary supplement companies in China: operation and development of 22 companies, including By-Health, Ruilian International Limited and Shandong Dong-E E-Jiao Group.

Ruinian International Limited is China's largest amino acid dietary supplement production enterprise, with its amino acid products enjoying a market share of over 80% in East China and 42.3% in China. At present, the company focuses on developing new products and expanding sales channels. On the one hand, it will launch more competitive and special nutritional dietary supplement through internal R & D and acquisition of potential technologies; and on the other hand, it will establish at least 100 Ruinian healthy shops in more than 40 cities of 15 provinces, and set up 12 flagship stores in Shanghai, Wuxi, Nanjing, Shenzhen and other cities.

Shandong Dong-E E-Jiao Group is China's largest donkey-hide gelatin enterprise. In 2011, the company's proceeds from donkey-hide gelatin products achieved RMB2.289 billion, contributing to 84.67% of company's revenue, with the product gross margin of 70.83%. The company mainly sells products in East China. Specifically, its revenue from East China accounted for 37.2%, that from South China 21.1%, and that from North China and Southwest China 8.2% each.

By-Health is a leader in Chinese nutritional dietary supplement market, boasting more than 330 dealers across the country. In 2011, the number of sales terminals in China registered 21,000 or more, up 8,000-plus against that at the end of 2010. From 2007 to 2011, the company's operating revenue showed a CAGR of 77.1%.

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