



# China Chinese Patent Medicine Industry Report, 2012-2015

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## 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

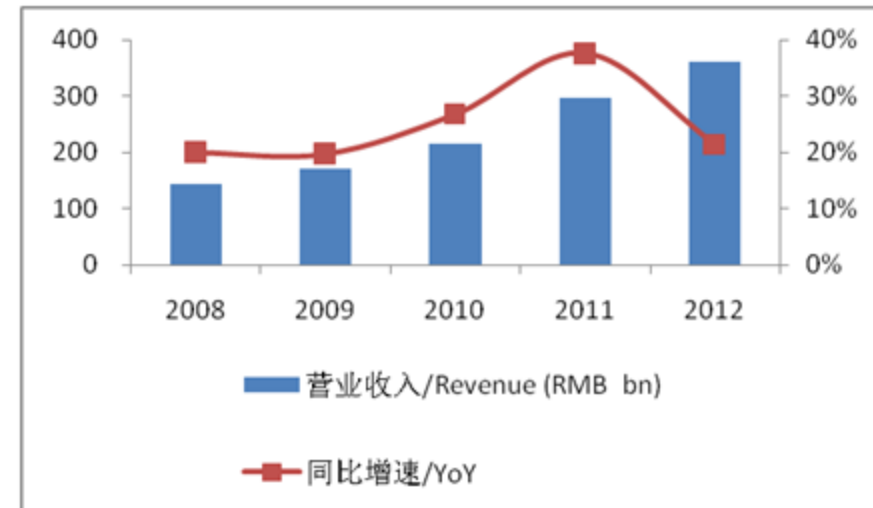
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

## Abstract

In recent years, China's Chinese patent medicine industry has been running in good condition, with the revenue increasing from RMB 142 billion in 2008 to RMB 360 billion in 2012 at a CAGR of 26.2%. Over the same period, the total profit maintained a CAGR of 26.6%, and the gross margin remained higher than the average level of the overall pharmaceutical industry.

In succession to the Opinions on Promoting the Development of Traditional Chinese Medicine Services and Trade, the Twelfth Five-Year Plan on the Development of Traditional Chinese Medicine and other favorable policies, the new National Essential Drugs List published in March 2013 increased the number of Chinese patent medicine from 102 in 2009 to 203, and the proportion in total quantity from 33% to 39%. As a result, China's Chinese patent medicine market demand is expected to grow rapidly in the next five years.

### Revenue and YoY Growth Rate of China's Chinese Patent Medicine Industry, 2008-2012



Source: National Bureau of Statistics of China; ResearchInChina China Chinese Patent Medicine Industry Report, 2012-2015

Chinese patent medicine for the treatment of cardiovascular and cerebrovascular diseases, tumor diseases, respiratory system diseases, musculoskeletal diseases and digestive system diseases are top five categories of Chinese patent medicine for hospitals in China. The Chinese patent medicine for the treatment of cardiovascular and cerebrovascular diseases occupies the largest market share, which remained at around 37% in 2006-2012. Outstanding enterprises producing Chinese patent medicine for the treatment of cardiovascular and cerebrovascular diseases include Shandong Buchang Pharma (products include Guanxin Shutong Capsule and Naixinshu Oral Solution), Tianjin Tasly Group (products include Compound Danshen Dripping Pills and Yangxue Qingnao Granule), Jinling Pharmaceutical (products include Mailuoning Injection and Mailuoning Oral Solution), Shijiazhuang Yiling Pharmaceutical (products include Tongxinluo Capsule and Shensong Yangxin Capsule), etc.

As China's Chinese patent medicine is gaining international recognition, coupled with the incentive from high profit (the operating margin is generally above 70%) and the development bottleneck of the chemical pharmaceutical industry, foreign enterprises and institutions such as Novartis, Merck, Johnson & Johnson, GSK have set foot in the Chinese patent medicine market through joint ventures and wholly-owned subsidiaries.

For example, in early 2013, GSK announced to carry out drug development trying to use traditional Chinese medicinal ingredients in China.

### **China Chinese Patent Medicine Industry Report, 2012-2015 of ResearchInChina mainly includes the following contents:**

Industrial policies, development status, regional market, import and export, development trend of China's Chinese patent medicine industry;

Development status of the raw material market of China's Chinese patent medicine industry as well as the development status and import & export of China's plant extracts;

China's Chinese patent medicine market segments, including Chinese patent medicine for the treatment of cardiovascular and cerebrovascular diseases, tumor diseases, respiratory system diseases, etc.;

Operation, revenue structure, gross margin and profit forecast of China's 10 major Chinese patent medicine production enterprises.

### **1. Overview of Chinese Patent Medicine**

- 1.1 Definition and Features
- 1.2 Classification
  - 1.2.1 Classification by Dosage Form
  - 1.2.2 Classification by Pharmacology
  - 1.2.3 Industry Chain

### **2. Operating Environment for Chinese Patent Medicine Industry**

- 2.1 Policies
  - 2.1.1 Domestic Policies
  - 2.1.2 Foreign Policies
- 2.2 Consumption Trend
- 2.3 Industry Trend

### **3. Market of Chinese Patent Medicine Industry**

- 3.1 Development Status
- 3.2 Supply and Demand
  - 3.2.1 Supply
  - 3.2.2 Demand
- 3.3 Regional Market
- 3.4 Import and Export
  - 3.4.1 Export
  - 3.4.2 Import
- 3.5 Demand Trend
- 3.6 Traditional Chinese Medicinal Materials
- 3.7 Plant Extract

### **4. Chinese Patent Medicine Market Segments**

- 4.1 Overview
- 4.2 Chinese Patent Medicine for Cardiovascular and Cerebrovascular Diseases
- 4.3 Chinese Patent Medicine for Tumor Diseases
- 4.4 Chinese Patent Medicine for Respiratory System Diseases
- 4.5 Chinese Patent Medicine for Musculoskeletal Diseases

### **5. Key Producers of Chinese Patent Medicine**

- 5.1 Tianjin Tasly Pharmaceutical Co., Ltd.
  - 5.1.1 Profile
  - 5.1.2 Operation
  - 5.1.3 Revenue Structure
  - 5.1.4 Gross Margin
  - 5.1.5 Development Prospect
- 5.2 Guizhou Yibai Pharmaceutical Co., Ltd.
  - 5.2.1 Profile
  - 5.2.2 Operation
  - 5.2.3 Revenue Structure
  - 5.2.4 Gross Margin
  - 5.2.5 Development Prospect
- 5.3 Yunnan Baiyao Group Co., Ltd.
  - 5.3.1 Profile
  - 5.3.2 Operation
  - 5.3.3 Revenue Structure
  - 5.3.4 Gross Margin

- 5.4 Zhangzhou Pientzhuang Pharmaceutical Co., Ltd.
  - 5.4.1 Profile
  - 5.4.2 Operation
  - 5.4.3 Revenue Structure
  - 5.4.4 Gross Margin
  - 5.4.5 Development Prospect
- 5.5 Shandong Dong-E E-Jiao Co., Ltd.
  - 5.5.1 Profile
  - 5.5.2 Operation
  - 5.5.3 Revenue Structure
  - 5.5.4 Gross Margin
  - 5.5.5 Development Prospect
- 5.6 China Resources Sanjiu Medical & Pharmaceutical Co., Ltd. (CR Sanjiu)
  - 5.6.1 Profile
  - 5.6.2 Operation
  - 5.6.3 Revenue Structure
  - 5.6.4 Gross Margin
  - 5.6.5 Development Prospect
- 5.7 Shanghai Kaibao Pharmaceutical Co., Ltd.
- 5.8 Kangmei Pharmaceutical Co., Ltd.
- 5.9 Tibet Rhodiola Pharmaceutical Holding Co., Ltd.
- 5.10 Beijing Tongrentang Co., Ltd. (TRT)

- Advantages and Disadvantages of Chinese Patent Medicine
- Classification of Chinese Patent Medicine by Dosage Form
- Classification of Chinese Patent Medicine by Pharmacology
- Chinese Patent Medicine Industry Chain
- Chinese Patent Medicine-related National Policies
- Number of Chinese Patent Medicine Enterprises in China, 2008-2012
- Revenue and YoY Growth Rate of Chinese Patent Medicine Industry in China, 2008-2012
- Total Profit and YoY Growth Rate of Chinese Patent Medicine Industry in China, 2008-2012
- Gross Margin of Chinese Patent Medicine Enterprises in China, 2011-2012
- Output and YoY Growth Rate of Chinese Patent Medicine in China, 2008-2012
- Output of Top 10 Chinese Patent Medicine Producing Regions in China, 2012
- Sales of Top 10 Chinese Patent Medicine Sales Regions in China, 2011
- Sales Structure of Top 10 Chinese Patent Medicine Sales Regions in China, 2011
- Top 10 Chinese Provinces/Municipalities by Number of Above-scale Chinese Patent Medicine Enterprises, 2012
- Top 10 Chinese Provinces/Municipalities by Sales of Chinese Patent Medicine Enterprises, 2012
- Top 10 Chinese Provinces/Municipalities by Total Profit of Chinese Patent Medicine Enterprises, 2012
- Chinese Provinces/Municipalities with Gross Margin of Chinese Patent Medicine Enterprises Above 40%, 2012
- Number of Enterprises, Sales and Total Profit of China's Chinese Patent Medicine Market by Region, 2012
- China's Chinese Patent Medicine Export Volume and YoY Growth Rate, 2008-2012
- China's Chinese Patent Medicine Export Value and YoY Growth Rate, 2008-2012
- China's Chinese Patent Medicine Export Destinations, Export Value and Products, 2012
- China's Chinese Patent Medicine Export Destination Structure by Export Value, 2012
- China's Chinese Patent Medicine Export Products, Export Volume and Export Destinations, 2012
- China's Top 10 Chinese Patent Medicine Export Enterprises, 2011
- China's Top 5 Chinese Patent Medicine Export Enterprises, 2012

- China's Chinese Patent Medicine Import Value and YoY Growth Rate, 2008-2012
- Revenue and Share in Pharmaceutical Industry of China's Chinese Patent Medicine Industry, 2008-2012
- China's Population Aged 65 and Above, 2002-2012
- Per Capita Healthcare Expenditure of China's Urban and Rural Residents, 2001-2011
- China's Number of Hospitals and CAGR, 2001-2011
- China's Panax Notoginseng Price, 2008-2012
- Trend Chart of Traditional Chinese Medicinal Material Comprehensive 200 Index, 2007-2012
- Price Index of Traditional Chinese Medicinal Materials in Chengdu, China, 2010-2012
- Major Traditional Chinese Medicinal Material GAP Enterprises in China, 2012
- China's Plant Extract Import and Export Value, 2008-2012
- China's Plant Extract Export Destination Structure by Export Value, 2012
- Share of Chinese Patent Medicine in the Medicine Sold to Hospitals in China by Disease, 2011
- Four Major Types of Chinese Patent Medicine for Cardiovascular and Cerebrovascular Diseases
- Share of Chinese Patent Medicine for Cardiovascular and Cerebrovascular Diseases in the Chinese Patent Medicine Sold to Hospitals in China, 2007-2011
- Excellent Brands of Chinese Patent Medicine for Cardiovascular and Cerebrovascular Diseases, 2012
- Share of Chinese Patent Medicine for Tumor Diseases in the Chinese Patent Medicine Sold to Hospitals in China, 2007-2011
- Top 10 Excellent Brands of Chinese Patent Medicine for Tumor Diseases in China, 2012
- Share of Chinese Patent Medicine for Respiratory System Diseases in the Chinese Patent Medicine Sold to Hospitals in China, 2007-2011
- Chinese Patent Medicine for Respiratory System Diseases in Sample Hospital by Type, 2009
- Excellent Brands of Chinese Patent Medicine for Respiratory System Diseases, 2012
- Share of Chinese Patent Medicine for Musculoskeletal Diseases in the Chinese Patent Medicine Sold to Hospitals in China, 2007-2011
- China's Top 10 Excellent Brands of Traditional Chinese Medicine for Musculoskeletal Diseases, 2012

- Revenue and YoY Growth Rate of Tasly, 2008-2012
- Net Income and YoY Growth Rate of Tasly, 2008-2012
- Revenue of Tasly by Sector, 2008-2012
- Revenue of Tasly by Region, 2008-2012
- Gross Margin of Tasly by Sector, 2008-2012
- Gross Margin of Tasly by Region, 2009-2012
- Revenue and Net Income of Tasly, 2011-2015
- Revenue and YoY Growth Rate of Yibai Pharmaceutical, 2008-2012
- Net Income and YoY Growth Rate of Yibai Pharmaceutical, 2008-2012
- Revenue of Yibai Pharmaceutical by Sector, 2009-2012
- Revenue of Yibai Pharmaceutical by Product, 2008-2012
- Revenue of Yibai Pharmaceutical by Region, 2008-2012
- Gross Margin of Yibai Pharmaceutical by Sector, 2009-2012
- Gross Margin of Yibai Pharmaceutical by Product, 2008-2012
- Gross Margin of Yibai Pharmaceutical by Region, 2008-2012
- Revenue and Net Income of Yibai Pharmaceutical, 2011-2015
- Revenue and YoY Growth Rate of Yunnan Baiyao, 2008-2012
- Net Income and YoY Growth Rate of Yunnan Baiyao, 2008-2012
- Revenue of Yunnan Baiyao by Sector, 2008-2012
- Revenue of Yunnan Baiyao by Product, 2009-2012
- Revenue of Yunnan Baiyao by Region, 2008-2012
- Gross Margin of Yunnan Baiyao by Sector, 2008-2012
- Gross Margin of Yunnan Baiyao by Product, 2009-2012
- Gross Margin of Yunnan Baiyao by Region, 2008-2012
- Revenue and Net Income of Yunnan Baiyao, 2011-2015



- Revenue and YoY Growth Rate of Pientzhuang, 2008-2012
- Net Income and YoY Growth Rate of Pientzhuang, 2008-2012
- Revenue of Pientzhuang by Sector, 2008-2012
- Revenue of Pientzhuang by Region, 2008-2012
- Gross Margin of Pientzhuang by Sector, 2008-2012
- Gross Margin of Pientzhuang by Product, 2008-2012
- Gross Margin of Pientzhuang by Region, 2008-2012
- Revenue and Net Income of Pientzhuang, 2011-2015
- Revenue and YoY Growth Rate of Dong-E E-Jiao, 2008-2012
- Net Income and YoY Growth Rate of Dong-E E-Jiao, 2008-2012
- Revenue of Dong-E E-Jiao by Product, 2008-2012
- Revenue of Dong-E E-Jiao by Region, 2008-2012
- Gross Margin of Dong-E E-Jiao by Product, 2008-2012
- Gross Margin of Dong-E E-Jiao by Region, 2009-2012
- Revenue and Net Income of Dong-E E-Jiao, 2011-2015
- Revenue and YoY Growth Rate of CR Sanjiu, 2008-2012
- Net Income and YoY Growth Rate of CR Sanjiu, 2008-2012
- Revenue of CR Sanjiu by Sector, 2008-2012
- Revenue of CR Sanjiu by Region, 2008-2012
- Gross Margin of CR Sanjiu by Sector, 2008-2012
- Revenue and Net Income of CR Sanjiu, 2011-2015
- Revenue and YoY Growth Rate of Shanghai Kaibao, 2008-2012
- Net Income and YoY Growth Rate of Shanghai Kaibao, 2008-2012
- Revenue of Shanghai Kaibao by Product, 2008-2012
- Revenue of Shanghai Kaibao by Region, 2008-2012

- Gross Margin of Shanghai Kaibao by Product, 2008-2012
- Revenue and Net Income of Shanghai Kaibao, 2011-2015
- Revenue and YoY Growth Rate of Kangmei Pharmaceutical, 2008-2012
- Net Income and YoY Growth Rate of Kangmei Pharmaceutical, 2008-2012
- Revenue of Kangmei Pharmaceutical by Region, 2008-2012
- Gross Margin of Kangmei Pharmaceutical by Region, 2008-2012
- Revenue and Net Income of Kangmei Pharmaceutical, 2011-2015
- Revenue and YoY Growth Rate of Tibet Rhodiola Pharmaceutical, 2008-2012
- Net Income and YoY Growth Rate of Tibet Rhodiola Pharmaceutical, 2008-2012
- Revenue of Tibet Rhodiola Pharmaceutical by Product, 2008-2012
- Revenue of Tibet Rhodiola Pharmaceutical by Region, 2008-2012
- Gross Margin of Tibet Rhodiola Pharmaceutical by Sector, 2008-2012
- Gross Margin of Tibet Rhodiola Pharmaceutical by Product, 2008-2012
- Gross Margin of Tibet Rhodiola Pharmaceutical by Region, 2008-2012
- Revenue and Net Income of Tibet Rhodiola Pharmaceutical, 2011-2015
- Revenue and YoY Growth Rate of Tongrentang, 2008-2012
- Net Income and YoY Growth Rate of Tongrentang, 2008-2012
- Revenue of Tongrentang by Region, 2008-2012
- Gross Margin of Tongrentang by Region, 2009-2012
- Revenue and Net Income of Tongrentang, 2011-2015

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