



**China Chinese Patent Medicine Industry Report,
2013-2016**

Mar. 2014

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

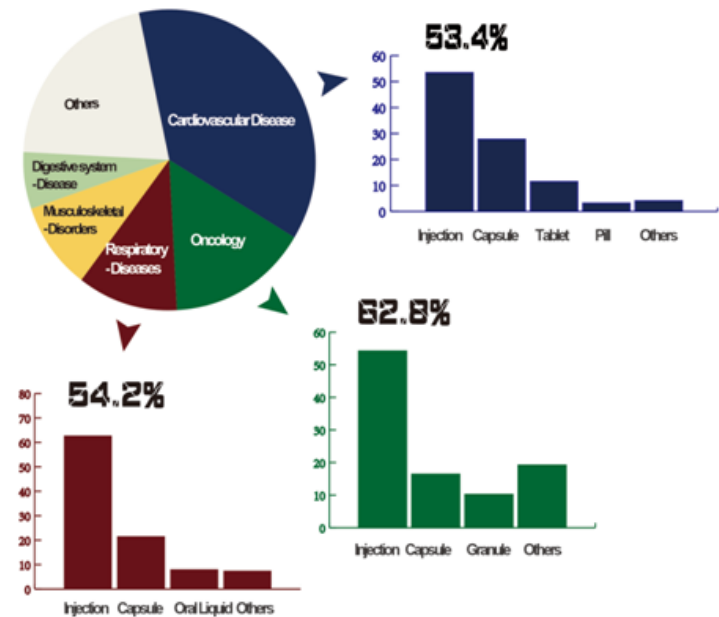
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

Chinese patent medicine refers to the certain dosage forms of medicine, under the guidance of TCM (traditional Chinese medicine) theory, made from traditional Chinese medicinal materials in accordance with specified prescription and standard. Chinese patent medicine industry covers the upstream Chinese herbal medicine production and preliminary processing, the middle pharmaceutical sectors as well as downstream commercial institutions of drug circulation and sales.

Currently, the State is enhancing its support for the Chinese patent medicine industry, successively introducing the Continuing Improving TCM Healthcare Policy, Notice on Conducting Construction of Key Projects of TCM Trade in Services and other favorable policies in 2013. In 2010-2013, China's Chinese patent medicine industry developed rapidly, with revenue soaring from RMB215.4 billion to RMB448.2 billion at a CAGR of 27.7%.

Demand Structure of Chinese Patent Medicine by disease or dosage forms



Source: China Chinese Patent Medicine Industry Report, 2013-2016; ResearchInChina

According to hospital terminal data, Chinese patent medicine for the treatment of cardiovascular and cerebrovascular diseases, tumor diseases and respiratory system diseases are the top three categories of Chinese patent medicine in China, respectively accounting for 37.2%, 15.4% and 11.1% market share in 2012-2013. As far as the distribution of Chinese patent medicine formulations is concerned, there is a clear trend of convergence in injection, and injection formulation products in the top three categories of Chinese patent medicine all made up above 50%.

Cardiovascular and cerebrovascular disease market is the biggest market for Chinese patent medicine, but also the most-variety field with item sales of over RMB500 million. The representative products include ginkgo leaf injection, Shuxuetong injection, Danhong injection, Xingnao injection, and more.

In the international market, there is a higher recognition of Chinese patent medicine in Asia, especially in Southeast Asia, and many varieties of Chinese patent medicine are included in the Medicare drug list stipulated by Southeast Asian countries, and special departments are established for management research as well. But in the U.S. and European markets, affected by access restrictions and differences in medical health concept, Chinese patent medicine is still only sold as health care product. However, the international market sees strong demand for plant extracts (mostly traditional Chinese medicinal materials) whose export value in 2010-2013 grew at a CAGR of 44% and accounted for approximately 50% of China's TCM export value.

China Chinese Patent Medicine Industry Report, 2013-2016 mainly covers the followings:

- ✘ Introduction to China's Chinese patent medicine industry chain as well as domestic and foreign policies, consumer trends and industry trends;
- ✘ Development situation, supply and demand, import and export, regional analysis, industry chain segments, etc. of Chinese patent medicine industry;
- ✘ China's Chinese patent medicine market segments, involving Chinese patent medicine for the treatment of cardiovascular and cerebrovascular diseases, tumor diseases, etc.;
- ✘ Profile and analysis, development prospect and earnings forecast, industry trends and market forecast of key Chinese patent medicine manufacturers in China.

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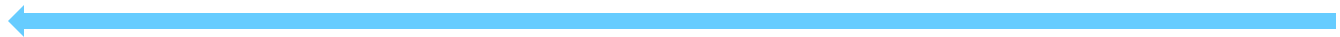
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