

Global Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material market size is expected to reach \$ 9025 million by 2032, rising at a market growth of 11.4% CAGR during the forecast period (2026-2032).

Artificial substitutes for rare and endangered animal-derived medicinal materials refer to products developed through chemical synthesis or biotechnological approaches (including synthetic biology, bionics, cell engineering, etc.) that partially or fully replicate the efficacy of natural rare and endangered animal-derived medicinal materials (such as musk, bezoar, tiger bone, bear bile powder, antelope horn, pangolin scales, etc.), serving as raw material supplies for the production of Chinese patent medicines. These artificial substitutes are filed under Category 1.3 of the Chinese herbal medicine registration classification (“new medicinal materials and their preparations”) and are approved for market after pharmaceutical, pharmacological/toxicological, and clinical studies demonstrate comparability with natural materials. The core value lies in protecting wildlife resources while ensuring raw material supply security for well-established Chinese patent medicines (such as Angong Niu Huang Wan, Shexiang Baoxin Wan, Pien Tze Huang, etc.).

The artificial substitutes for rare and endangered animal-derived medicinal materials are transitioning from monopoly to a structure of intensified competition and regulatory bottlenecks. On pricing, new entrants in in vitro cultivated bezoar (Baiyunshan Caizhilin, Yunnan Pharmaceutical Group, Sichuan Shennong, etc.) have quoted below RMB 130,000/kg, putting pressure on former sole supplier Jianmin Dapeng’s pricing system; artificial musk remains exclusively priced by Beijing Lianxin with stable terminal prices; artificial tiger bone powder is exclusively supplied by Ginwa Enterprise with no price

erosion. Gross margins diverge sharply: Jianmin Dapeng's in vitro cultivated bezoar achieves over RMB 1.5 million net profit per ton, contributing 35%-40% of Jianmin Group's gross margin, yet faces downward pressure as competition intensifies; Beijing Lianxin maintains high margins on its exclusive artificial musk license; Ginwa Enterprise's artificial tiger bone powder enjoys stable margins due to classified formula and patent protection. Downstream applications are concentrated in emergency Chinese patent medicines (Angong Niu Huang Wan, Shexiang Baoxin Wan), chronic disease management (Pien Tze Huang, Jintiange Capsule), and over 300 classical formulas, with extremely rigid demand. Incremental demand comes from policy-driven substitution (NMPA's 2025 announcement supporting substitutes for pangolin scales, antelope horn, bear bile powder, etc.) and resource scarcity-driven replacement. Upstream includes raw material supply (natural musk, natural bezoar, bear bile) and technology R&D (synthetic biology, biomimetic synthesis); downstream includes pharmaceutical manufacturers (Tongrentang, Guangyuyuan, Pien Tze Huang, etc.) and medical institutions. The landscape is tri-tiered: artificial musk (Beijing Lianxin monopoly, >99% substitution rate, saturated market); in vitro cultivated bezoar (moving from Jianmin Dapeng sole supplier to at least six competitors, capacity expansion 10-20x, initial price war); artificial tiger bone powder (Ginwa Enterprise exclusive, steady growth); bear bile/antelope horn/pangolin scales (regulatory bottleneck: Yanbian Bear Farm, Yunnan Dali Ruihe, etc. have filed supplementary applications; Chongqing Jize and Zhongshan Bailing have manufacturing capabilities but none yet approved; no legal entity holds production qualification for antelope horn or pangolin substitutes). Key uncertainties lie in approval timelines – despite CDE's technical guidelines, actual approval dates, clinical equivalence validation standards, and conditional approval pathways remain unclear. Additionally, capacity release schedules and price war intensity will reshape value distribution in the cultivated bezoar segment. Conclusion: The artificial substitutes sector is driven by three forces – irreversible resource depletion, accelerating policy-mandated substitution, and mature technology pathways. The core characteristics are monopoly in mature categories (musk, tiger bone), intensifying competition in scaling categories (bezoar), and regulatory bottlenecks in blank categories (bear bile, antelope horn, pangolin). The greatest value variable is not technical feasibility but who gains approval first, under what standards, and how capacity and cost advantages translate into market share post-approval.

This report studies the global Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material and provides

market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material total production and demand, 2021-2032, (Tons)

Global Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material total production value, 2021-2032, (USD Million)

Global Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material domestic production, consumption, key domestic manufacturers and share
Global Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Beijing Lianxin Pharmaceutical, Shandong Hongjitang Pharmaceutical, Firmenich, Givaudan, International Flavors & Fragrances (IFF), Symrise, Takasago International, Wuhan Jianmin Dapeng Pharmaceutical, HEC (HEC Pharma), Ginwa Enterprise (Xi'an Ginwa Pharmaceutical Factory), etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Artificial Substitute for Rare & Endangered Animal-Derived

Medicinal Material market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/Ton) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material Market, Segmentation by Type:

Musk

Bezoar

Tiger Bone

Bear Bile Powder

Antelope Horn

Pangolin Scales

Others

Global Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material Market, Segmentation by Process:

Chemical Synthesis

Biosynthesis / Synthetic Biology

In Vitro Cultivation

Biomimetic / Bionic Synthesis

Economic Animal Byproduct Synergistic Compatibility

Global Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material Market, Segmentation by Application:

Acute Critical Care Chinese Patent Medicines

Chronic Disease Management Chinese Patent Medicines

Classical Prescriptions / Traditional Formulas

Preparation Intermediates / APIs

Others

Companies Profiled:

Beijing Lianxin Pharmaceutical

Shandong Hongjitang Pharmaceutical

Firmenich

Givaudan

International Flavors & Fragrances (IFF)

Symrise

Takasago International

Wuhan Jianmin Dapeng Pharmaceutical

HEC (HEC Pharma)

Ginwa Enterprise (Xi'an Ginwa Pharmaceutical Factory)

Guangzhou Baiyunshan Pharmaceutical (Caizhilin Pharmaceutical)

Yunnan Pharmaceutical Group

Sichuan Shennong Pharmaceutical

Jiangsu Binghetang Pharmaceutical

Baicaotang Pharmaceutical

Koyuan Pharmaceutical

Zhongxing Mushroom (002772)

Yichang Dongguang Winterworm Summerherb Ecological Breeding

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SnowRong Bio (300511)

Beijing Yanji Biotechnology

Qinghai Digital Healing Intelligent Technology

Monolis

Chongqing Jize Biotechnology

Zhongshan Bailing Biotechnology

Yanbian Bear Farm

Yunnan Tianyou Xiongye Pharmaceutical

Yunnan Dali Ruihe Pharmaceutical

Heilongjiang Yebao Pharmaceutical

Tieling Shenxiong Pharmaceutical

Guangzhou Jinxiong Pharmaceutical

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Anhui Kebao Bioengineering

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BASF

Soda Aromatic

ACS International

Triveni Chemicals

Puyang Yuantai Fine Chemicals

Chance Sun Import & Export

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NHU

Puyang Ouya Aromas

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Daewoong Chemical

Mitsubishi Tanabe Pharma

ICE Group

PharmaZell

Dipharma Francis

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Kracie

Tochimoto

Itoh Kampo

Kokando

Ohmine

Key Questions Answered:

1. How big is the global Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material market?
2. What is the demand of the global Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material market?
3. What is the year over year growth of the global Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material market?
4. What is the production and production value of the global Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material market?
5. Who are the key producers in the global Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material market?
6. What are the growth factors driving the market demand?

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