

# Global Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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## Abstracts

According to our (Global Info Research) latest study, the global Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material market size was valued at US\$ 4222 million in 2025 and is forecast to a readjusted size of US\$ 9025 million by 2032 with a CAGR of 11.4% during review period.

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 is a detailed and comprehensive analysis for global Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material market. Both quantitative and

qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

#### Key Features:

Global Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material market size and forecasts, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material market shares of main players, shipments in revenue (\$ Million), sales quantity (Tons), and ASP (US\$/Ton), 2021-2026

#### The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

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, sales quantity, revenue, 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.

## Market Segmentation

Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

### Market segment by Type

Musk

Bezoar

Tiger Bone

Bear Bile Powder

Antelope Horn

Pangolin Scales

Others

### Market segment by Process

Chemical Synthesis

Biosynthesis / Synthetic Biology

In Vitro Cultivation

Biomimetic / Bionic Synthesis

Economic Animal Byproduct Synergistic Compatibility

#### Market segment by Application

Acute Critical Care Chinese Patent Medicines

Chronic Disease Management Chinese Patent Medicines

Classical Prescriptions / Traditional Formulas

Preparation Intermediates / APIs

Others

#### Major players covered

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

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Zhongxing Mushroom (002772)

Yichang Dongguang Winterworm Summerherb Ecological Breeding

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Guangzhou Jinxiong Pharmaceutical

Lanzhou Fengchun Sheye Technology

Xinjiang Baokang Pharmaceutical

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BASF

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Daewoong Chemical

Mitsubishi Tanabe Pharma

ICE Group

PharmaZell

Dipharma Francis

Tsumura

Kracie

Tochimoto

Itoh Kampo

Kokando

Ohmine

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of

Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material, with price, sales quantity, revenue, and global market share of Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material from 2021 to 2026.

Chapter 3, the Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material.

Chapter 14 and 15, to describe Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material sales channel, distributors, customers, research findings and

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