

Global Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material Market Growth 2026-2032

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Abstracts

The global Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material market size is predicted to grow from US\$ 4014 million in 2025 to US\$ 8913 million in 2032; it is expected to grow at a CAGR of 12.1% from 2026 to 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 Niuhuang Wan, Shexiang Baoxin Wan), chronic disease management (Pien Tze Huang, Jintiang 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.

LP Information, Inc. (LPI) ' newest research report, the ?Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material Industry Forecast? looks at past sales and reviews total world Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material sales in 2025, providing a comprehensive analysis by region and market sector of projected Artificial Substitute for Rare & Endangered Animal-Derived

Medicinal Material sales for 2026 through 2032. With Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material industry.

This Insight Report provides a comprehensive analysis of the global Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material.

This report presents a comprehensive overview, market shares, and growth opportunities of Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Musk

Bezoar

Tiger Bone

Bear Bile Powder

Antelope Horn

Pangolin Scales

Others

Segmentation by Process:

Chemical Synthesis

Biosynthesis / Synthetic Biology

In Vitro Cultivation

Biomimetic / Bionic Synthesis

Economic Animal Byproduct Synergistic Compatibility

Segmentation by Application:

Acute Critical Care Chinese Patent Medicines

Chronic Disease Management Chinese Patent Medicines

Classical Prescriptions / Traditional Formulas

Preparation Intermediates / APIs

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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

Xinshida Biotechnology

Guangdong Rundongxia Health Industry

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

Lanzhou Fengchun Sheye Technology

Xinjiang Baokang Pharmaceutical

Hunan Huana Pharmaceutical (688799)

Fujian Zhongyi Pharmaceutical

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Shaanxi Jichuang Huizhi Biotechnology

BASF

Soda Aromatic

ACS International

Triveni Chemicals

Puyang Yuantai Fine Chemicals

Chance Sun Import & Export

Wanxiang Technology

NHU

Puyang Ouya Aromas

Anhui Jinhe Industrial

Jiayuan Fragrances

Daewoong Chemical

Mitsubishi Tanabe Pharma

ICE Group

PharmaZell

Dipharma Francis

Tsumura

Kracie

Tochimoto

Itoh Kampo

Kokando

Ohmine

Key Questions Addressed in this Report

What is the 10-year outlook for the global Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material market?

What factors are driving Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material market opportunities vary by end market size?

How does Artificial Substitute for Rare & Endangered Animal-Derived Medicinal Material break out by Type, by Application?

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