

# Research Report On Entry Into China's Medicinal Herb Market

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## Abstracts

After the development for many years, a group of enterprises reputed as “China’s time-honored brands” have appeared in the field of traditional Chinese medicine in China, such as Guangzhou Pharmaceutical Company Limited, Yunnan Baiyao Group Co., Ltd., Beijing Tongrentang Group Co., Ltd., Tianjin Zhong Xin Pharmaceutical Group Co., Ltd., etc., which have gradually become the important parts of the developing traditional Chinese medicine industry. According to the data released by the National Bureau of Statistics of China, large-scale enterprises in China’s medicine manufacturing industry achieve a gross industrial output value of RMB 565.902 billion Yuan, a product sales revenue of RMB 520.723 billion Yuan and total profit of RMB 49.921 billion Yuan from January to November in 2007, up by 24.87%, 24.56% and 51.07% over the same period of the previous year respectively. From January to November in 2007, the traditional Chinese medicine industry achieves a gross industrial output value of RMB 158.453 billion Yuan and sales revenue of RMB 142.448 billion Yuan, which respectively take 28% and 27.36% in the gross industrial output value and sales revenue of medicine manufacturing industry. Besides, the concentration ratios of enterprise sales revenue and regional sales revenue of the large-scale enterprises have reached 40.58% and 63.16% respectively.

China is a big exporter of natural medicine in the world. The traditional Chinese medicine exported from China is mainly Chinese herbal medicine with a lower price and a large consumption amount, and the annual export volume accounts for 20% of the recollection (harvesting) mount of Chinese herbal medicine. In addition, as China is the cradle of traditional Chinese medicine and has a great population with about 50% people adopting traditional Chinese medicine for treatment when ill, the products of Chinese herbal medicine are mainly to meet the domestic demands.

The medicine material importers must be enterprises obtaining the Pharmaceutical Trading Enterprise Certificate issued by the Ministry of Health. The process from import to distribution of medicine material shall be inspected by the National Institute for the Control of Pharmaceutical and Biological Products, China Customs and the State Food and Drug Administration, so as to ensure absolute safety of imported medicine material. Furthermore, the State Food and Drug Administration and China Customs promulgated the Non-initial Directory of Imported Medicine Material in 2006, in which a strict management system for medicine material import guarantees the quality of medicine material and at the same time restricts the rapid growth of medicine material import to a certain extent.

In 2007, the import quantity of herbal medicine products reaches 19.1 thousand tons, which is down by 25.96% over the same period of the previous year and is 0.96 times of that in 2003. The average annual rate of growth from 2003 to 2007 is 4.13%, wherein, the largest increase is achieved in 2004, with an annual rate of growth of 46.1%. The import amount of herbal medicine products is \$34.2656 million dollars, which is up by 63.37% over the same period of the previous year and is 1.05 times of that in 2003, and the average annual rate of growth from 2003 to 2007 is 9.70%.

The major places of origin for China's imported herbal medicine products are mainly in Asia. In 2007, the main places of origin for China's imported herbal medicine products are countries and areas such as Thailand, Taiwan and India, wherein, the herbal medicine products imported from Thailand are 2,913.73 tons, taking 15.26% of the total import quantity of herbal medicine products, from Taiwan are 2,296.67 tons, taking 12.03% and from India are 2,188.22 tons, taking 11.46%. The total import quantity from the aforesaid three countries and areas is 7,398.63 tons, occupying 38.76% of the total import quantity of herbal medicine products.

Affected by China's dual economic structure as well as the urban and rural per capita income level, the consumption market of Chinese herbal medicine in urban areas is different from that in rural areas. In 2007, the per capita disposable income of urban residents is RMB 13,786 Yuan, up by 17.24% over the same period of the previous year, and the per capita medical care consumptive expenditure is RMB 699 Yuan, taking 6.9% of the total per capita medical care consumptive expenditure; while the per capita net income for rural residents is RMB 4,140 Yuan, up by 15.42% over the same period of the previous year, and the per capita medical care consumptive expenditure is RMB 210 Yuan, taking 6.5% of the total per capita expenditure. Thus we may conclude that urban residents will still be the main consumption group of Chinese herbal medicine in the future, and the domestic demand for traditional Chinese medicine material in

2010 is expected to reach about 1.2-1.5 million tons.

## Contents

### **CHAPTER 1 PRODUCT DEFINITION**

- 1.1 product definition
- 1.2 product classification

### **CHAPTER 2 OVERVIEW OF CHINA'S HERBAL MEDICINE MARKET**

- 2.1 China's economy: basic facts
- 2.2 introduction on the current domestic macro-economic situation
- 2.3 situation of the development of domestic herbal medicine industry in 2007
- 2.4 the prediction of the future potential domestic herbal medicine market

### **CHAPTER 3 INTRODUCTION ON THE DOMESTIC INDUSTRIAL ENVIRONMENT**

- 3.1 The Relevant Industrial Policies
- 3.2 Relevant Laws And Regulations
- 3.3 Sino-Foreign Cooperation Agreement
  - 3.3.1 China-New Zealand Cooperation
  - 3.3.2 Agreement Of Cooperation In Traditional Chinese Medicine Field Signed Between China Mainland And Hongkong
  - 3.3.3 China-France Cooperation
- 3.4 The Prediction Of The Policy Tendency

### **CHAPTER 4 OVERVIEW FOR THE IMPORT CONDITION OF HERBAL MEDICINE PRODUCTS**

- 4.1 analysis for the import change of herbal medicine products in recent years
- 4.2 the main place of origin for China's imported herbal medicine products
- 4.3 main domestic flow destination for China's imported herbal medicine products

### **CHAPTER 5 OVERVIEW FOR THE EXPORT CONDITION OF HERBAL MEDICINE PRODUCTS**

- 5.1 analysis for the export change of herbal medicine products in recent years
- 5.2 the major destinations of export herbal medicine products of China
- 5.3 major domestic origin places of the export herbal medicine products of China

## **CHAPTER 6 THE TAX BURDEN CONDITION OF IMPORT PRODUCTS**

- 6.1 import tariff duty
- 6.2 value-added tax
- 6.3 consumption tax

## **CHAPTER 7 INSPECTION AND QUARANTINE AND STANDARD SYSTEM**

- 7.1 procedures of inspection and quarantine to import herbal medicine products
- 7.2 the main detection criterion and monitoring index
- 7.3 the relevant standard of the herbal medicine products
- 7.4 the main management institutes

## **CHAPTER 8 PROCESS OF THE IMPORT HERBAL MEDICINE PRODUCT**

- 8.1 import herbal medicine flow chart
- 8.2 the explanation for the procedure of importing Chinese herbal medicine

## **CHAPTER 9 COMPETITIVE CONDITION IN DOMESTIC MARKET FOR HERBAL MEDICINE**

- 9.1 the analysis of concentration ratio of the different enterprises selling income
- 9.2 the analysis on the sale income concentration of the regions
- 9.3 the position of the import herbal medicine products in domestic market
- 9.4 the introduction of the top ten enterprises in the medicine manufacturing industry of China in terms of the sales volume
  - 9.4.1 Guangzhou Pharmaceutical Holdings Limited
  - 9.4.2 Chongqing Taiji Group CO., LTD.
  - 9.4.3 Jilin Xiu Zheng Medicine Group CO., LTD.
  - 9.4.4 Tianjin Tasly Group CO., LTD.
  - 9.4.5 Yunnan Baiyao Group CO., LTD.
  - 9.4.6 Huiren Group. LTD.
  - 9.4.7 Sanjiu Medical And Pharmaceutical CO., LTD.
  - 9.4.8 Beijing Tongrentang Group CO., LTD.
  - 9.4.9 Tianjin Zhongxin Pharmaceutical Group CO., LTD.
  - 9.4.10 Chengzhi Shareholding CO., LTD.
- 9.5 The Distribution Map Of The Large-Scale Enterprises In The Whole Countries

## **CHAPTER 10 THE ANALYSIS OF THE MARKET SALE CHANNELS**

- 10.1 the main sale channels of China herbal medicine products
- 10.2 graphic representation of the sale channel of domestic herbal medicine products
- 10.3 the analysis of the sale channels of China herbal medicine products

## **CHAPTER 11 THE ANALYSIS OF MARKET ACCESS IN CHINA**

- 11.1 the analysis of feature of domestic herbal medicine products consumers
- 11.2 the analysis of the opportunity of the market entry
- 11.3 analysis on non-tariff barrier of market entrance
- 11.4 main conclusions and suggestions

## **CHAPTER 12 LIST OF MAJOR CHINESE HERBAL MEDICINE IMPORTERS IN CHINA**

## **CHAPTER 13 RELATED ASSOCIATIONS**

- 13.1 China Association Of Traditional Chinese Medicine
- 13.2 China Association Of Chinese Medicine
- 13.3 China Chamber Of Commerce For Import & Export Of Medicines & Health Products

## **CHAPTER 14 RELATED EXHIBITION**

- 14.1 China National (Xinjiang) Medicine And Health Products Exhibition
- 14.2 The 13th China Medicine & Health Products Fair 2008 (Guangzhou)
- 14.3 The 15th China Medicine And Health Products Industry (Zhengzhou) Exhibition

## **CHART CONTENTS**

**Figure 1** Change in Quantity and the increase Rates for China's Imported Herbal Medicine Products From 2003 to 2007(Unit: kilogram)

**Figure 2** Change in the Value and the increase Rates for China's Imported Herbal Medicine Products From 2003 to 2007(Unit: US dollar)

**Figure 3** The Main Place of Origin for China's Imported Herbal Medicine Products in 2007(divided by the import quantity)

**Figure 4** Change Trend for the Main Place of Origin for China's Imported Herbal Medicine Products form 2003 to 2007(Unit: kilogram)

**Figure 5** The Import Value in the Main Place of Origin for China's Herbal Medicine

Products in 2007(Divided By Import Value)

**Figure 6** Change Trend for the Main Place of Origin for China's Imported Herbal Medicine Products form 2003 to 2007(Unit: US dollar)

**Figure 7** top Ten Main Domestic Areas for Importing Quantity of Herbal Medicine Products in 2007

**Figure 8** Change Trend for Importing Quantity in the Past Years in Main Domestic Areas for Importing Herbal Medicine Products (Unit: Percent)

**Figure 9** top Ten Main Domestic Areas for Importing Value of Herbal Medicine Products in 2007

**Figure 10** Change Trend of the Import Value in the Past Years in Main Domestic Areas for Importing Herbal Medicine Products (Unit: Percent)

**Figure 11** The Export Quantity and the increasing Rate of China Herbal Medicine Products From 2003 to 2007 (Unit: kilogram)

**Figure 12** The Value and the increasing Rate of Exported Herbal Medicine Products in China From 2003 to 2007 (Unit: US dollar)

**Figure 13** The top Ten Quantity Destinations of Export Herbal Medicine Products of China in 2007

**Figure 14** The top Ten Value Destinations of Export Herbal Medicine Products of China in 2007

**Figure 15** Major Origin Places of the Export Herbal Medicine Products of China in 2007(Unit: kilogram, US dollar)

**Figure 16** The Proportion of the total income of the top 10 Traditional Chinese Medicine Enterprises in total Sales income of the industry in 2007

**Figure 17** Proportion of top Ten Areas of Sale income in Traditional Chinese Medicine Enterprises in the total Sale Amount of the Whole Country in 2007

**Figure 18** The Distribution Map of the Large-Scale Enterprises in Chinese Medicine industry in the Whole Country From January to November in 2007

## TABLE CONTENTS

**Table 1** Category of Botanical Medicine Products

**Table 2** Macro-Economy index of China in 2007

**Table 3** The Main Economic indexes of the Large-Scale Enterprises in the Traditional Medicine industry (Unit: number, person, thousand yuan)

**Table 4** The Import Quantity and the increase Rate of Herbal Medicine Products From 2003 to 2007(Unit: kilogram)

**Table 5** The Import Value and the increase Rate of Herbal Medicine Products From 2003 to 2007(Unit: US dollar)

**Table 6** Top Ten Main Places of Origin for Importing Quantity of China Herbal Medicine

Products and the Change Trend in 2007(Unit: kilogram)

**Table 7** Top Ten Main Places of Origin for Importing Value of China Herbal Medicine Products and the Change Trend in 2007(Unit: US dollar)

**Table 8** The Import Quantity and the increasing Rate in the Past Years of the top Ten Domestic Areas for Importing Quantity of Herbal Medicine Products in 2007 (Unit: kilogram)

**Table 9** The Import Value and the increasing Rate in the Past Years of the top Ten Domestic Areas for Importing Value of Herbal Medicine Products in 2007 (Unit: US dollar)

**Table 10** The Export Quantity and the increasing Rate of the Herbal Medicine Products in China From 2003 to 2007 (Unit: kilogram)

**Table 11** The Export Value and the increase Rate of Herbal Medicine Products From 2003 to 2007(Unit: US dollar)

**Table 12** The Major Destinations Ranking of Export Herbal Medicine Products of China in 2007

**Table 13** Top Ten Quantity Destinations of Export Herbal Medicine Products of China in 2007and the increasing Rates in the Past Years (Unit: kilogram)

**Table 14** Top Ten Value Destinations of Export Herbal Medicine Products of China in 2007 and the increasing Rates in the Past Years (Unit: US dollar)

**Table 15** The Rank of the Main Original Place of the Export Herbal Medicine Products of China in 2007

**Table 16** Top Ten Quantity Original Places of the Export Herbal Medicine Products of China in 2007 and their increasing Rates in the Past Years. (unit: kilogram)

**Table 17** Top Ten Value Original Places of the Export Herbal Medicine Products of China in 2007 and their increasing Rates in the Past Years. (unit: US dollar)

**Table 18** The Import Tariff Rate of Herbal Medicine Products

**Table 19** The Limited Amount index in Heavy Metals and Arsenic Salt

**Table 20** Aflatoxin Content

**Table 21** Pesticide Residues

**Table 22** The Other Relevant Standard of the Herbal Medicine Products

**Table 23** The Supervising Organizations of the Import Herbal Medicine Products

**Table 24** The Economic Operation Situation of the top Ten Large-Scale Enterprises in Traditional Chinese Medicine industry in China in 2007(Unit:thousand yuan)

**Table 25** The Listing Numbers of the Large-Scale Enterprises in Chinese Medicine industry in All Regions in Our Country From January to November in 2007



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