

Report of Traditional Chinese Medicine Industry under, 2009

<https://marketpublishers.com/r/R97B6A5E7A3EN.html>

Date: April 2009

Pages: 60

Price: US\$ 1,334.00 (Single User License)

ID: R97B6A5E7A3EN

Abstracts

The traditional Chinese medicine is Chinese traditional medical science. The traditional Chinese medicines mainly conclude traditional Chinese medical materials, traditional Chinese medicine pills and proprietary Chinese medicines. The traditional Chinese medical materials are the raw materials of the traditional Chinese medicine pills and the traditional Chinese medicine pills are the raw materials of the proprietary Chinese medicines.

The traditional Chinese medicine industry researched in this report concludes two parts: the traditional Chinese medicine pill processing industry and the proprietary Chinese medicine manufacture. In 2008, the scale of the traditional Chinese medicine market was about 26 billion USD and the yields totaled 1.2 million tons. The upstream industry of the traditional Chinese medicine industry concludes the traditional Chinese medicine farming and the downstream industry of the medicine circulation, residential health and insurance etc.

The traditional Chinese medicines play an important role in modern Chinese medicine and pharmacology field. Chinese government supports the traditional Chinese medicines. Among Catalogue of Basic Medicines of the State, Catalogue of Nonprescription Medicines and Catalogue of Basic Medical Insurance Medicines, the traditional Chinese medicines account for a large proportion at average. The regulations, such as Law of the People's Republic of China on Guarding State Secrets, Provisional Rules on the Management of State Science and Technology Plans and Regulations on Protection of Traditional Chinese Medicines and etc, drew up strict protection measures on the traditional Chinese medicines, let the traditional Chinese medicines enjoy much longer protection time than other medicines. Compared with other sub-sectors of the medicine industry, the traditional Chinese medicine industry

has following advantages:

1. Resource Advantage

The types of the traditional Chinese medicine material in China are more than 12 thousand (including 11-thousand-type plant medicines, 15-hundred-type animal medicines and one-hundred-type mineral medicines). The patent traditional Chinese medicines reach to five thousand types. The variety types, abundant resources lead to the huge development space for the traditional Chinese medicines.

2. Demand Advantage

The traditional Chinese historic culture accumulates a host of the traditional Chinese medicine users. With the spring-up of the natural treatment in the world, people gradually recognize the limitations and the side effects of the chemical medicines. The traditional Chinese medicines are gradually recognized and applied in the world, making the increasing demands for the traditional Chinese medicines in the international market. Compared with the chemical medicines, the proprietary Chinese medicines have longer survival period and will show the strong power with the long inspection in the chronic experiments.

3. Theory Advantage

The theory of traditional Chinese medicine is closely related to Chinese traditional mysterious philosophy, attracting lots of following attentions.

4. Low Cost Advantage

The costs of the traditional Chinese medicines are generally less than the western medicines. In the underdeveloped regions, the traditional Chinese medicines attract more attentions.

In 2008, the import and export volumes of the traditional Chinese medicines reached to 1.752 billion USD, YOY up by 14.08% to the record high. The import volume was YOY up by 24.46% to 443 million USD. The export volume was YOY increased by 10.94% to 1.309 billion USD, realizing the trade surplus of 866 million USD.

In 2008, the countries explored the traditional Chinese medicine trade with China exceeded 163 in the world, Asia and Europe as the major import and export market for

the traditional Chinese medicines. The trade volume with Asia was 1.13 billion USD, YOY up by 11.79%, with the average price growth rate of 31.93%, accounting for 64.41% in the total trade volume.

As the whole growth rate kept steady growth, the export growth speed of the subdivided medicines was changed. The export volume of the traditional Chinese medicine pills was cut down year on year by 24.56%, with the export amounts YOY up by 5.7% and the growth speed slow down obviously. The growth rate of the unit price was YOY up by 40.12%. The export volume of the traditional Chinese medicine pills to Asia accounted for 81.08%, with the export volume down sharply.

In 2008, the export growth rate of the traditional Chinese medicines to Hong Kong was only about 1.13%, obviously less than the previous years. The major reason was the consumption limitation in Hong Kong. Most of the imported traditional Chinese medicines were used to transit trade. However, the financial crisis made the import and export dealers cut down the trade costs and the intermediate links. In 2008, the export of the traditional Chinese medicines to Singapore was also declined. The major reason was more and more import dealers transferred to the industry and trade integration enterprises. They substituted the imported medicines with the proprietary Chinese medicines processed and extracted from traditional Chinese medicine materials.

The major driving type for traditional Chinese medicine export was the traditional Chinese medicine extracts. In 2008, the export amounts of the traditional Chinese medicine extracts ranked the first place, but the growth speed was obviously slowed. The export and import of the proprietary Chinese medicines kept a steady growth, with the export volume to 354 million USD, YOY up by 17.67%, but the import volume exceeding the export volume, the first trade deficit since 1995. The trade deficit amounts of the health products were 21.1 million USD, with the import growth rate exceeding 15 percentage points of the export growth rate.

The influences of international financial crisis on the traditional Chinese medicine trade will be aggravated in 2009 because most traditional Chinese medicines are used to the dietary supplements, food and food additives. Compared with the chemical medicines, the elasticity demands are comparatively large. Besides, the up-valuation of Chinese currency, close-down of partial oversea import dealers and the decline of the consumption market all will affect the consumption volumes of the traditional Chinese medicines in the world.

More following information can be obtained in this report:

- Present Development Situation of Traditional Chinese Medicine Industry
- Factors Affecting the Development of Traditional Chinese Medicine Industry
- Sub-sectors of Traditional Chinese Medicine Industry
- Market Hotspots of Traditional Chinese Medicine Industry
- Major Enterprises and Their Operations of Traditional Chinese Medicine Industry
- Imports and Exports of Traditional Chinese Medicine Industry
- Influences of International Financial Crisis on Traditional Chinese Medicine Industry
- Development Trends of Traditional Chinese Medicine Industry
- Investment Opportunities of Traditional Chinese Medicine Industry

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