

Pharmacy Retail - China - September 2012

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"China is a massive pharmaceuticals market, perhaps the biggest in the world, but it is dogged by invasive regulation, price-capping and the widespread penetration of fake drugs, all of which combine to inhibit the industry from reaching its true potential. A high degree of fragmentation in the market also means that, until very recently, significant retail pharmacy chains were unable to generate sizeable market shares."

– **Matthew Crabbe** – Asia-Pacific Research Director

In this report we answer the key questions:

- What opportunities are there in a market so highly regulated and fragmented, and is the situation beginning to improve thanks to healthcare reform?
- What will the ageing of the population and the changing consumer needs created by the reforming of the market mean to the leading chains as they endeavour to adapt and innovate their product and service offering to suit those changes?
- Is the legitimate online pharmacy retail sector in China finally beginning to escape the guilt of association with the illegal online drugs market, and is it on the cusp of rapid growth?
- Traditional Chinese medicine (TCM) seems to still be a strong growth sector, but does it really have potential as part of the offering of the retail, over-the-counter (OTC) pharmaceutical market, and why has it not been more widely introduced before?

Included in this report:

- **Pharmacy retailing:** This market covers retail outlets that are principally engaged in the distribution and sale of prescription and over-the-counter (OTC) pharmaceuticals through retail outlets, institutional retail outlets (located in hospitals) and online, but which also engage in sales of healthcare equipment and non-health-related goods.
- **Traditional Chinese Medicines (TCM):** Pharmaceutical products manufactured using traditional Chinese native herbal or animal-based ingredients, with curative action focused on a more holistic, longer-term approach.
- **Vitamins and Minerals:** This market covers single/dual, multi-vitamins and minerals. Market size comprises sales through all retail channels including direct to consumer.

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