

Pharmacy Retail - China - December 2014

Report Price: £2463.80 | \$3990.00 | €3129.79

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"The pharmacy retailing market in China is fragmented and competitive. While competition is increasing, to stay ahead of the game, players are facing the challenges of diversification and differentiation. Embracing the latest technology and digital revolution is a crucial factor to stay ahead." – Wenwen Chen, Senior Beauty & Personal Care Analyst

This report looks at the following areas:

- Consumers' general behaviour towards ailments;
- Pharmacy retailers visited;
- Products shopped in pharmacy retailers;
- Consumers' choice criteria towards brick and mortar pharmacies;
- Consumers' choice criteria towards online pharmacies;
- Consumers' general buying habits in pharmacies.

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Pharmacy Retail - China - December 2014

Report Price: £2463.80 | \$3990.00 | €3129.79

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Introduction

Issues and insights discussed in the report:

- Methodology
- Research scope
- Market sizing scope
- Survey scope
- Abbreviations
- China's main basic medical insurance schemes
- The New Rural Cooperative Medical Scheme (NCMS)
- Urban Employed Basic Medical Insurance (UEBMI)
- New Rural Cooperative Medical Insurance (NRCMI)
- Urban Resident Basic Medical Insurance (URBMI)

Executive Summary

Big health, diversification, differentiation
Figure 1: best- and worst-case forecast of China retail value sales of pharmacy retailing, 2009-19

Trust is everything
Figure 2: Important factor when deciding where to shop offline and online and buying habit, August 2014

Technology embracement defines future success for Chinese pharmacy
Figure 3: Important factor when deciding where to shop offline and online and buying habit, August 2014

Targeting different demographics based on their needs

City specific solution

What we think

Issues and Insights

Technology embracement defines future success for Chinese pharmacy

- The facts
- The implications

Trust is everything

- The facts
- The implications

Targeting different demographics based on their needs

- The facts
- The implications

City specific solution

- The facts
- The implications

Trend Application

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
EMAIL: reports@mintel.com

Pharmacy Retail - China - December 2014

Report Price: £2463.80 | \$3990.00 | €3129.79

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Who Needs Humans
Transumers
Mintel Futures: Human

Market Drivers

Health-care reform: a top national priority
Figure 4: designated government agencies for china's healthcare reform implementation

Health care future focus

Separate Hospitals from Medicine Sales to Lower Costs

Foreign-owned hospitals in more cities

Pharmaceutical multinationals rethink rebate marketing in China

The future of online OTC sales

Portfolio diversification to increase traffic

Demographics challenges: an ageing society and one-child policy
Figure 5: proportion of three age groups, 2007-13

Economic development: growth in demand

Market Size and Forecast

Key points

A fast evolving market with high level of dynamics
Figure 6: china pharmacy retailing market, value and volume, 2009-2013

Market Forecast

The future – big health, diversification, differentiation
Figure 7: best- and worst-case forecast of China retail value sales of pharmacy retailing, 2009-19
Figure 8: best- and worst-case forecast of China retail volume of pharmacy retailing, 2009-19

Market Segmentation and Market Share

Key points

Market segment: a highly fragmented market

Market share: large number of players with small shares
Figure 9: market share by value, 2011-2013
Figure 10: market share by volume 2011-2013

Who's Innovating?

Key points

Innovations for Transumers

Vending medicines
Figure 11: medicine vending machine at shanghai metro stations, july 2014

Welcome to GPS drug couriers

Who needs human

Robot in the skies

Second skin: wearable health hub

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
EMAIL: reports@mintel.com

Pharmacy Retail - China - December 2014

Report Price: £2463.80 | \$3990.00 | €3129.79

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Trust is everything
Technology reassuring authenticity
Return to experts
Internet giants tap into health market

Companies and Brands

Guo Da Pharmacy Drugstore
Company background
Business strategies
Recent activities
Guangdong Dasenlin Chain Drugstore Co. Ltd.
Company background
Business strategies
Recent activities
Chongqing Tong Jun Ge Drugstore Ltd
Company background
Business strategies
Recent activities
Chongqing Peace Drugstore Ltd.
Company background
Business strategies
Recent activities
China Nepstar Chain Drugstore Ltd.
Company background
Business strategies
Recent activities

The Consumer – Behaviour towards Ailments

Key points
Trustworthy branding is crucial for pharmacy retailing in China
Figure 12: Consumer behaviour towards ailments, August 2014
Cultivate loyalty amongst young generations
Figure 13: Consumer behaviour when suffering ailments, by demographics, August 2014
Making pharmacy and health services more accessible to low-income consumers
Figure 14: Consumer behaviour towards ailments, by demographics, August 2014
City-specific solutions

The Consumer – Channel Usage

Key points
Chain store is the most popular channel
Figure 15: Pharmacy retailer visited in the past six months, August 2014

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
EMAIL: reports@mintel.com

Pharmacy Retail - China - December 2014

Report Price: £2463.80 | \$3990.00 | €3129.79

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Clear demographic differences

Figure 16: Pharmacy retailer visited in the past six months, by demographics, August 2014

Figure 17: Pharmacy retailer visited in the past six months, by demographics, August 2014

City disparities remain in buying channels

The Consumer – Products Purchased

Key points

OTC dominates the market sales

Figure 18: Product brought from in the past six months, August 2014

Gender disparity towards pharmacy products

Figure 19: Product brought from in the past six months, August 2014

Figure 20: Product brought from in the past six months, by demographics, August 2014

City differences towards product shopped

Repertoire analysis

Figure 21: Repertoire of product brought from in the past six months, August 2014

Figure 22: Repertoire of product brought from in the past six months, by demographics, August 2014

Figure 23: Repertoire of product brought from in the past six months, by demographics, August 2014

From problem solving to prevention

Figure 24: Repertoire of product brought from in the past six months, by demographics, August 2014

The Consumer – Choice Criteria Offline

Key points

Building trust is the top priority

Figure 25: Important factor when deciding where to shop offline, August 2014

Convenience is king

Demographic disparities towards offline stores preference

Figure 26: Important factor when deciding where to shop offline, by demographics, August 2014

Figure 27: Important factor when deciding where to shop offline, by demographics, August 2014

City differences towards offline stores

Figure 28: Important factor when deciding where to shop offline, by demographics, August 2014

Product availability could increase trustworthiness

The Consumer – Choice Criteria Online

Key points

Reassuring product authenticity

Figure 29: Important factor when deciding where to shop online, August 2014

Demographic disparities towards online stores preference

The Consumer – Buying Habits

Key points

Authenticity is the top priority

Figure 30: Buying habits at pharmacies/drugstores, August 2014

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
EMAIL: reports@mintel.com

Pharmacy Retail - China - December 2014

Report Price: £2463.80 | \$3990.00 | €3129.79

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Brand building

Privacy issues will help consumers shift online

TCM holds the ground

Leverage in-store assets

Demographic differences towards buying habits

Figure 31: Buying habits at pharmacies/drugstores, by demographics, August 2014

Figure 32: Buying habits at pharmacies/drugstores, by demographics, August 2014

City differences towards buying habits

Appendix – The Consumer – Behaviour towards Ailments

Figure 33: Consumer behaviour towards ailments, August 2014

Figure 34: Most popular consumer behaviour towards ailments, by demographics, August 2014

Figure 35: Next most popular consumer behaviour towards ailments, by demographics, August 2014

Appendix – The Consumer – Channel Usage

Figure 36: Pharmacy retailer visited in the past six months, August 2014

Figure 37: Most popular pharmacy retailer visited in the past six months, by demographics, August 2014

Figure 38: Next most popular pharmacy retailer visited in the past six months, by demographics, August 2014

Figure 39: Other pharmacy retailer visited in the past six months, by demographics, August 2014

Appendix – The Consumer – Products Purchased

Figure 40: Product brought from in the past six months, August 2014

Figure 41: Product brought from in the past six months – Medical and health, by demographics, August 2014

Figure 42: Product brought from in the past six months – Beauty and personal care, by demographics, August 2014

Repertoire of product shopped

Figure 43: Repertoire of product brought from in the past six months, August 2014

Figure 44: Repertoire of product brought from in the past six months, by demographics, August 2014

Appendix – The Consumer – Choice Criteria Offline

Figure 45: Important factor when deciding where to shop offline, August 2014

Figure 47: Next most important factor when deciding where to shop offline, by demographics, August 2014

Figure 48: Other important factor when deciding where to shop offline, by demographics, August 2014

Appendix – The Consumer – Choice Criteria Online

Figure 49: Important factor when deciding where to shop online, August 2014

Figure 50: Most important factor when deciding where to shop online, by demographics, August 2014

Figure 51: Next most important factor when deciding where to shop online, by demographics, August 2014

Figure 52: Other important factor when deciding where to shop online, by demographics, August 2014

Appendix – The Consumer – Buying Habits

Figure 53: Buying habits at pharmacies/drugstores, August 2014

Figure 54: Most popular buying habits at pharmacies/drugstores, by demographics, August 2014

Figure 55: Next most popular buying habits at pharmacies/drugstores, by demographics, August 2014

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com