



# Wellbeing Clinic Newsletter

**Today's Focus:**

## **TCM - STATE OF THE MARKET**

***We thought that it will be beneficial to give you an overview, a bigger picture, of how the TCM market looks like. We hope that you can see from there how TCM reality in China and elsewhere around the world is actually very different from the picture still frequently painted in some media of wizardly individuals brewing “possibly dangerous” concoctions and pot-pourris inspired by “nonsense” and “magical thinking”. Some of the articles quoted below are already a little dated, which we think does not make them any less valid, but to the contrary, they may be even more significant given the benefit of the hindsight.***

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We are probably all familiar with small Chinese shops around London and elsewhere in the UK but perhaps not everyone is aware that TCM represents a large global market. The value of the global TCM market has been evaluated as being worth several billions USD in 2022 and is expected to more than double by 2032. We have not quoted the exact figures as these vary between different sources we have seen, but there seems to be a consensus around the fact that this market has been actively growing and even “booming”.

By far the largest part of the TCM sector in monetary value is represented by Chinese herbal medicine (herbal remedies), followed by acupuncture and cupping.

The TCM market globally still remains very fragmented and largely consists of individual practitioners or small, often family run businesses. However, some of the major Chinese herbal medicine products' manufacturers are large multimillion sized companies, many listed on stock exchange. Examples of such major TCM companies include:

- Sanju (China)
- Tasly Pharmaceutical Group (China)
- TSMURA (Japan)
- PIEN TZE HUANG (China)

- Beijing TongRenTang (China)
- Jiangsu Kanion Pharmaceutical Co. Ltd. (China)
- YUNNAN BAIYAO (China)
- Guangzhou Pharma (China)
- Kangmei Pharmaceutical Co. Ltd. (China)

In China, where this discipline originates from and where it has been practiced for some 5-8 thousand years, TCM is an integral part of the overall public health sector and a medical specialisation in its own right rather than merely a “complementary” discipline. TCM doctors in China are educated in medical universities, and are subject to the same training and professional experience standards and requirements as conventional medicine doctors. Such TCM professionals are fully versed in both conventional and traditional medicine and commonly exercise their profession in Chinese hospitals, GP surgeries, medical research facilities or within pharmaceutical industry.

Some other Asian countries sought to replicate this healthcare model. For example, between 2006 and 2010 Malaysia opened 12 hospitals that practice both modern and traditional medicine, whilst WHO has established 25 collaborating centres for traditional medicine: 7 in China, 5 in Africa, 3 in Europe and 2 each in

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Japan, South Korea, India and the USA, 1 in Vietnam and 1 in North Korea in view of encouraging research and training into traditional medicine and provide professional advice to support the development of WHO guidelines.

Manufacturing of TCM products in China is subject to the same regulatory safety and quality requirements as those applicable to pharmaceutical products. In fact, some of the major manufacturers of TCM products in China are part of large pharmaceutical groups.

What is perhaps not so widely known in the UK is that the ancient TCM formulas in China have been codified in an official book of prescriptions, a sort of TCM encyclopaedia and any manufacturer producing a traditional remedy must strictly follow the exact prescription of such formula to ensure its expected safety and quality. As regards the growing number of “patent remedies”, developed more recently based on the knowledge of traditional Chinese herbs, these are subject to the same safety, efficacy and quality assessment procedures as pharmaceutical products.

China invested and continues to invest heavily in ensuring the safety, efficacy and quality of TCM. An insightful, albeit already somewhat

dated article in Nature.com published on 21 December 2011 entitled “TCM: Made in China” reports the following about the research and development investment from the central government in China:

*“The total funding allocated to TCM research was 4.9 billion yuan (US\$770.5 million) in 2010 — more than quadruple its 2001 level. In 2010, according to the State Administration of Traditional Chinese Medicine, 6,093 Chinese scientists were employed in TCM research — a 53% increase since 2001.”*

As of May 2011, China has also signed 91 TCM partnership agreements with more than 70 countries, which aim to promote greater recognition of TCM around the world.

Beyond China, TCM has been well established for some time now in many countries, including highly developed countries such as Australia, Canada, Taiwan or Japan and many countries have implemented regulatory frameworks to ensure safety of alternative medicine products and practices.

As an example we would like to quote the following extract from an article published on 10 April 2012 in the Journal of Ethnopharmacology (please note that this

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publication refers to “complementary medicines” in more general sense but Chinese Medicine is an important part in this category):

*“Surveys carried out in 1996 in Victoria and South Australia indicated about 50% of people had recently used alternative medicines. By early 2009, the National Institute of Complementary Medicine's (NICM) figures indicated that 2/3 of Australians use these medicines each year (Minister for Health and Family Services, 1996). Health professionals may be contributing to the increased usage in Australia. Research undertaken by the National Prescribing Service (NPS) in 2007 showed about 90% of general practitioners had recommended at least one complementary medicine in the last 12 months and almost all surveyed community pharmacists had recommended some kind of complementary medicine over that period (NICM, 2009).”*

Already mentioned above Nature.com publication indicates that in year 2010 USD 7.6 billion was spent on import of TCM products from China to the USA. Furthermore, according to the Centres of Disease Control and Prevention in Atlanta, Georgia “four out of ten US adults use complementary and alternative (CAM) in a given year.” (noting

again that CAM category includes TCM as well as other herbal medicines such as homeopathy). In the same year exports of TCM products from China to European countries “amounted to nearly USD 2 billion” and that this figure was at the time “rising at 10% per year”. National surveys at the time also found that “in the United Kingdom, approximately one in ten people had used CAM in the past year, whereas in Switzerland and the Scandinavian countries, the equivalent figures were between three and five out of ten”.

As regards Australia, the same Nature.com article states the following: “Australia has even higher figures: a national survey found that two-thirds of the population had used CAM in the past year and, at 69 million, the number of visits by Australian adults to CAM practitioners was almost identical to the number of visits made to medical doctors.”

And how does the Australian healthcare system perform? This is what the Department of Health and Aged Care of the Australian Government has to say to the country's citizens in the front lines of their website: “Australia's health system is one of the best in the world. It provides quality, safe and affordable health care for you and your family.

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*It's a key reason why we enjoy one of the longest life expectancies in the world.” And, if you believe the Australian Institute of Health and Welfare, as of 2 July 2024: “In general, Australia compares well with other OECD countries on many health measures. In particular, Australia's results are more favourable than the OECD average for many indicators, including perceived health status, mortality and public and private health insurance coverage.”*

So Australians have been routinely seeing alternative practitioners for decades now and it doesn't look like any major disaster occurred as a result, quite the contrary in fact. This may come as a surprise to those unfamiliar with TCM, but for us who know from everyday experience what TCM can do it makes a perfect sense.

We further learn from Nature.com that *“Pharmaceutical companies are also taking an active interest in TCM research. For instance, London-based GlaxoSmithKline has established a research and development base in Shanghai, China, and is actively seeking to expand its operations in traditional medicine. Most of these companies are hoping to find the next ‘miracle’ drug like artemisinin, an antimalarial drug extracted from the medicinal*

*plant sweet wormwood, which has saved millions of lives”.*

You may recall from one of our earlier newsletters that artemisinin, widely acclaimed as “new-era antimalarial treatment” earned its discoverer Youyou Tu a Nobel Prize, among many other prestigious scientific awards, and that this research was successful thanks to a methodology found nowhere else than in a centuries old TCM book!

The upwards market trends reported in these above publications continue to head in the same direction. A recent article we have found on LinkedIn “Traditional Chinese Medicine (TCM) Market Is Booming Worldwide And Scope to 2032” published on 13 June 2024 states that:

*“Traditional Chinese Medicine remains a growth market”* and highlights a number of global health phenomena such as ageing population, increase of chronic disease as well as widespread public interest in cheaper, safer and more natural alternatives to conventional medication, which are likely to sustain the future growth of TCM.

It furthermore states that WHO has been *“enthusiastically supporting traditional medicine, especially TCM, which is a step*

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*towards the long-term goal of universal health care”.*

Coming back to China example again, a more recent paper entitled “Development of traditional Chinese medicine” published on 1 November 2021 in the Journal of Traditional Chinese Medical Sciences provides the following insights into the current state of TCM practice in China:

*“TCM is a major practice for disease treatment and is evidenced by multiple resources. There are 12 807 types of Chinese medicinal materials, including 11 146 types of plant medicine, 1581 types of animal medicine, 80 types of mineral medicine, 5000 types of Chinese patent medicine, and above one million prescriptions. There are 2088 pharmaceutical enterprises that have passed the Good Manufacturing Practice certification for manufacturing Chinese patent medicines.”*

and furthermore:

*“By the end of 2015, there were 3966 TCM hospitals (including 253 hospitals of TCM and 446 hospitals of integrated traditional Chinese and Western Medicine), 452 000 practitioners (assistants) of TCM (including doctors of TCM and integrated traditional Chinese and Western Medicine), 42 528 outpatient*

*departments and clinics of TCM (including 550 outpatient departments and clinics of TCM and 7706 outpatient departments and clinics of integrated traditional Chinese and Western Medicine). There are 42 colleges and universities of TCM (including 25 independent undergraduate colleges and universities of TCM). More than 200 western medicine colleges and universities or non-medicine colleges and universities have TCM majors, with 752 000 students. In 2015, the total number of people diagnosed and treated in TCM institutions was 910 million, and the number of people discharged from Chinese medical and health institutions was 26.915 million.”*

To put this in some wider perspective, a summary report on admitted patient care activity in English NHS hospitals and English NHS-commissioned activity in the independent sector for the year ending March 2016, published on [digital.nhs.uk](https://digital.nhs.uk) indicates that 19.2 million Finished Consultant Episodes (FCEs) and 16.3 million Finished Admission Episodes (FAEs) were recorded in 2015-16. (i.e. a total of 35.5 million hospital admissions).

Whilst figures are not fully comparable (let alone because an “episode” may be counted as finished not only after a successful

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discharge but also if it ends in a death or a transfer to another hospital), if we are reading this right, roughly in the same year, the TCM institutions in China alone have treated and discharged about 25.6 patients for every 1 patient admitted by English NHS hospitals, including cases commissioned by English NHS into the private health sector. We are not statisticians though so please take our calculations with a pinch of salt!

But what you can surely observe from there is that TCM is not a small or marginal sector, even if counting its activity in China alone.

The paper further informs us about the robust regulatory framework in place in China to ensure safety and efficiency of TCM practice:

*“To promote the standardization of TCM, China has formulated and implemented the Outline of the Medium and Long Term Development Plan for the Standardization of TCM (2011–2020), with 649 standards. Additionally, to promote the sustainable and healthy development of TCM, China approved the Law of the people's Republic of China on TCM in 2016, which has improved the regulation of TCM doctors, clinics, and medicines and helped standardize the practice of TCM, ensure medical safety and quality of TCM, and improve people's health.”*

There are further interesting insights into the current global reach of TCM:

*“Concerning international exchanges, TCM has spread to 183 countries and regions. According to the WHO, 103 member states have approved the use of acupuncture and moxibustion, 29 of which have established laws and regulations on TCM, while 18 have incorporated acupuncture into the medical insurance system. TCM has been registered as medicine in several countries, including Russia, Cuba, Vietnam, Singapore, and the United Arab Emirates. To date, >30 countries and regions have established hundreds of colleges and universities of TCM to cultivate local talents for TCM. The World Federation of Acupuncture-Moxibustion Societies, headquartered in China, has 194 member organizations in 53 countries and regions and 251 member organizations in 67 countries and regions in the World Federation of Chinese Medicine Societies.”*

More interesting information has been also made available about TCM contribution to healthcare in developing countries:

*“China assists developing countries and meets corresponding international obligations and has sent medical teams to more than 70 countries in Asia, Africa, and Latin America,*

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*with TCM personnel in every medical team. The country has recently strengthened the prevention and control of diseases such as AIDS, malaria, and other diseases in developing countries, especially in Africa, and has sent >400 TCM technicians to >40 countries, including Tanzania, Comorin, and Indonesia. These medical teams used TCM therapies, including acupuncture, moxibustion and Tuina massage, and integrated Chinese and Western medicine to deal with difficult and severe diseases, saving the lives of critically ill patients. This contribution has been praised by the governments and the people of the recipient countries.”*

As for ourselves, we are proud to be part of this worldwide trend and, based on our own experience, we also have many reasons to believe that TCM is extremely well positioned to play an even greater part within the public healthcare.

As such, TCM should be supported by the scientific and medical community, and indeed by anyone who genuinely minds the best interest of the patients.

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