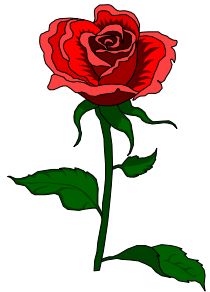
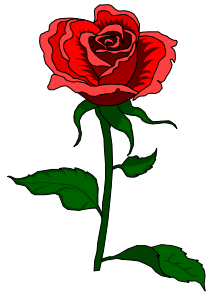
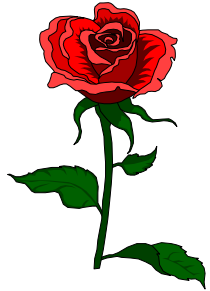
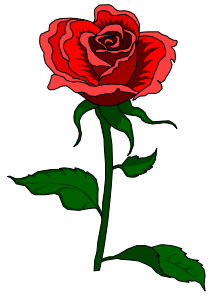
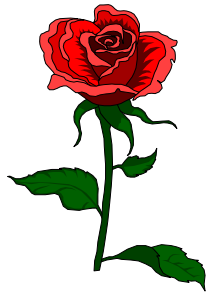


*L'évolution du marché
des plantes médicinales
au Québec et au Canada :
Influence du marché américain*

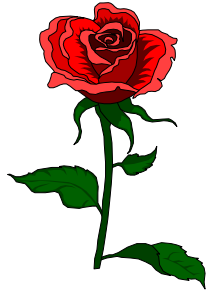


Le marché des plantes médicinales est soumis à de nombreuses influences.

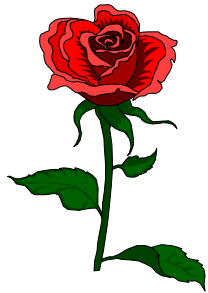
Faire l'évaluation de ce marché, principalement au Canada et au Québec, est relativement difficile en raison de deux facteurs.



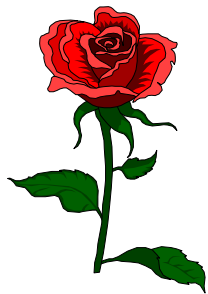
Embûches se dressant devant une étude de l'évolution du marché

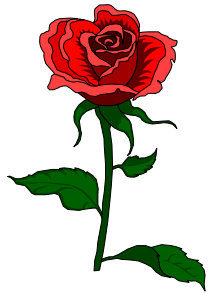
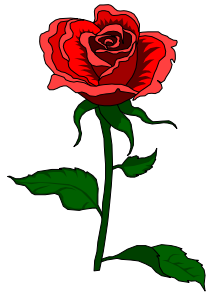
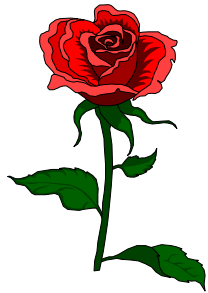
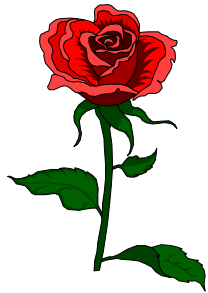


1. Le refus des principaux intervenants de communiquer l'importance qualitative des ventes;



2. L'absence de contrôle de la qualité des produits que l'on retrouve sur les tablettes des détaillants; cette situation ne nous permettant pas de calculer la quantité de plantes utilisées pour la production d'un produit donné.



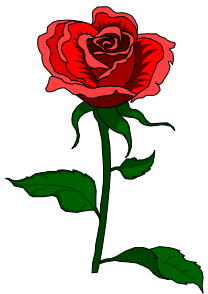
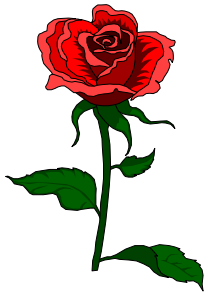
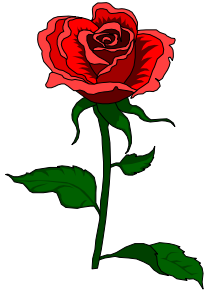
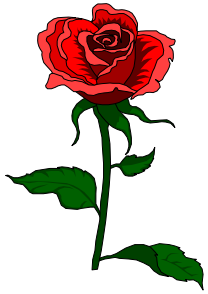


*L'évolution du marché
pharmaceutique*

I M S

Intercontinental Marketing Statistics

Auditeurs – Lecteurs



↖ *Scientifiques*

↖ *Chercheurs*

↖ *Industriels*

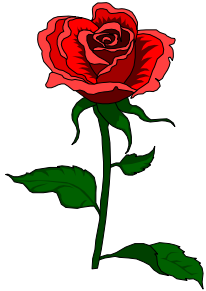
↖ *Commerçants*

L'évolution du marché des plantes médicinales au Québec et au Canada : Influences du marché américain

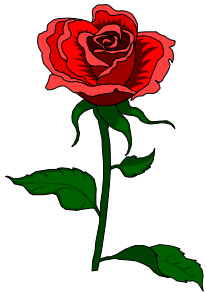


Le marché des plantes médicinales est soumis à de nombreuses influences. Faire l'évaluation de ce marché, principalement au Canada et au Québec, est relativement difficile en raison de deux facteurs:

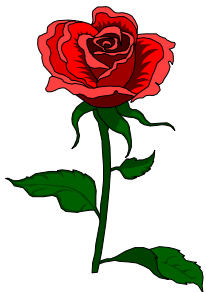
- 1. Le refus des principaux intervenants de communiquer l'importance qualitative des ventes;*
- 2. L'absence de contrôle de la qualité des produits que l'on retrouve sur les tablettes des détaillants; cette situation ne nous permettant pas de calculer la quantité de plantes utilisées pour la production d'un produit donné.*



Par contre, les marchés des États-Unis et des pays européens sont évalués mensuellement; de cette façon, on peut facilement connaître et suivre l'évolution de la consommation des principales plantes.



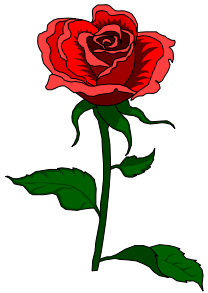
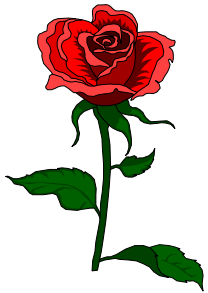
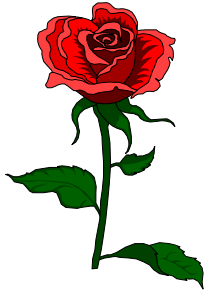
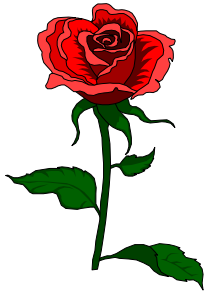
Par ailleurs, il ne faut surtout pas minimiser l'importance des grandes surfaces et des réseaux de vente (poste, porte-à-porte, etc.) sur la consommation de ces plantes.



Ainsi, on se doit de connaître aussi bien les aspects qualitatifs que quantitatifs de ce marché pour bien arriver à orienter sa démarche de développement en tant qu'entreprise dans ce domaine.

Dans la période de présentation qui nous sera dévolue, nous brosserons un tableau des besoins et de l'évolution du monde des simples qui nous touchent de près. Également, nous cernerons les paramètres qui gouverneront ce marché dans le futur.

Évaluation d'un marché

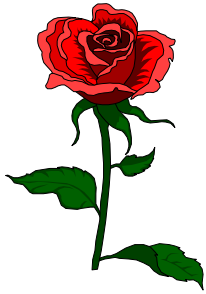


↖ *Matières premières*

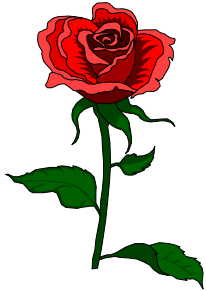
↖ *Produits (niveau de transformation)*

↖ *Canaux de distribution*

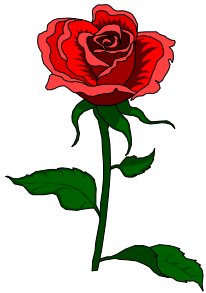
↖ *Choix du ou des canaux de distribution*



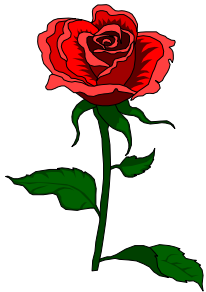
Réseaux de distribution



↖ *Magasins de produits de santé*



↖ *Grandes surfaces (Mass Market)*

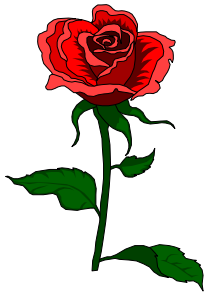


↖ *Vente postale*

↖ *Paliers multiples et réseaux de vente*

↖ *Professionnels*

↖ *Internet*

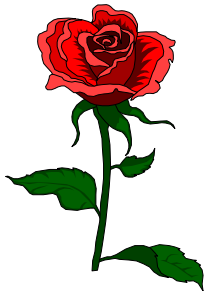


Magasins de produits de santé

Magasins spécialisés

Aliments naturels

Suppléments



Grandes surfaces

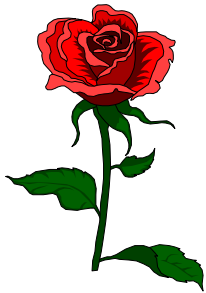
Épicerie

Pharmacies

Magasins de vente en gros

Magasins « club »

Magasins généraux

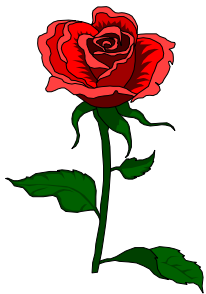


Vente postale

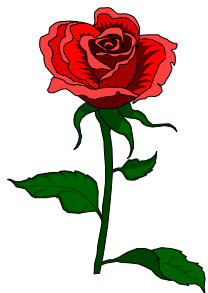
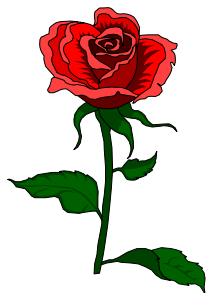
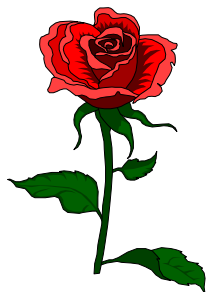
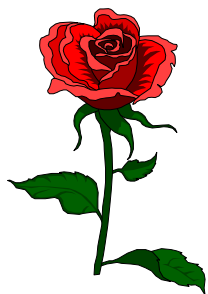
Catalogue

Publicité dans les magazines

Publicité à la télévision, radio, etc.



Internet



Professionnels

↖ *Chiropraticiens*

↖ *Acupuncteurs*

↖ *Homéopathes*

↖ *Massothérapeutes*

↖ *Thérapeutes*

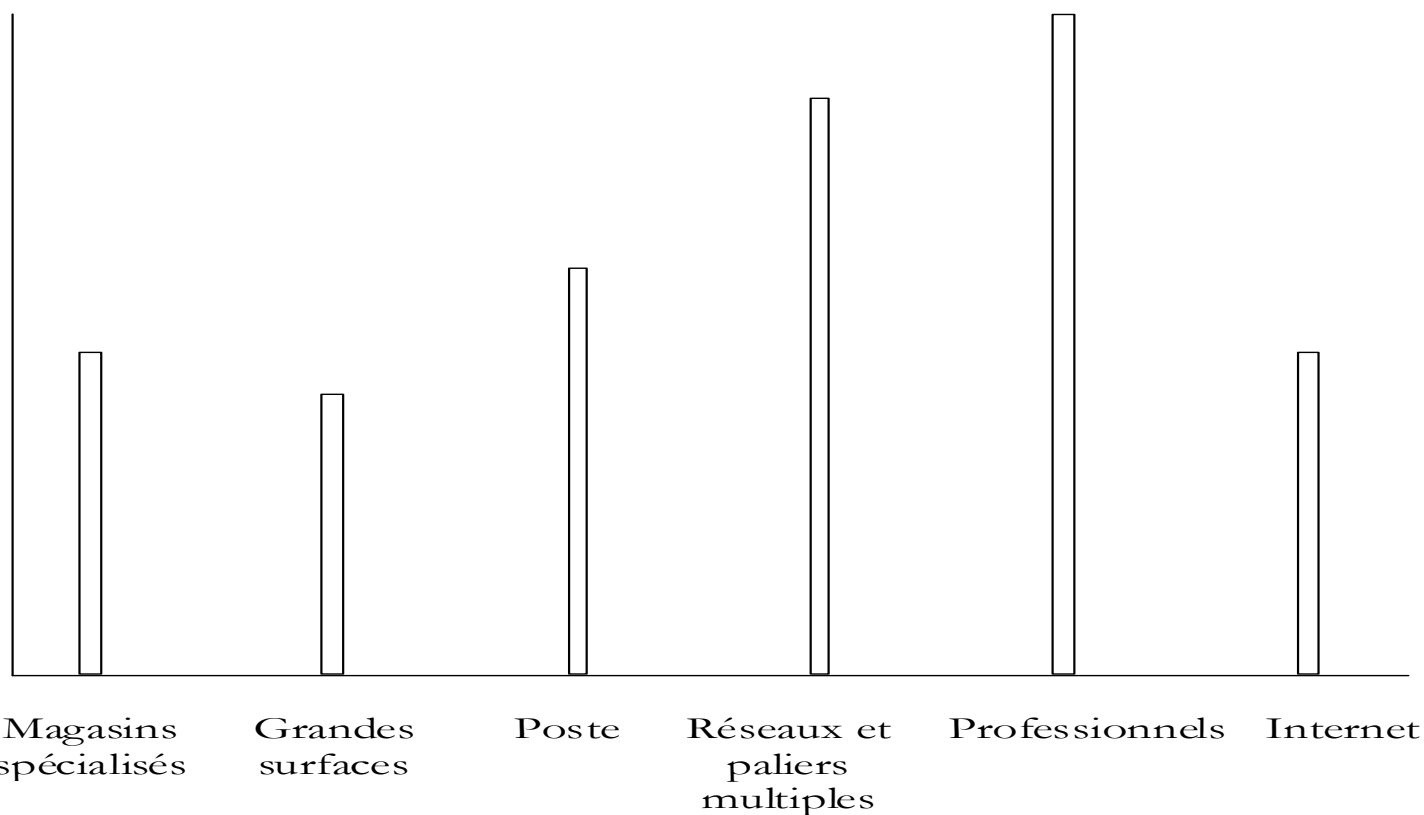
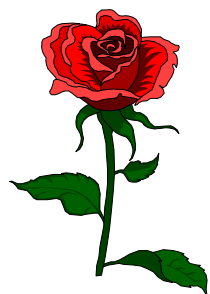
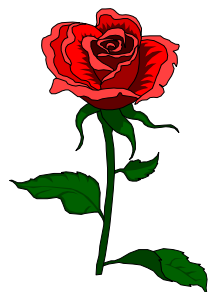
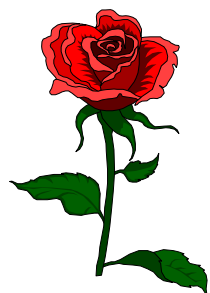
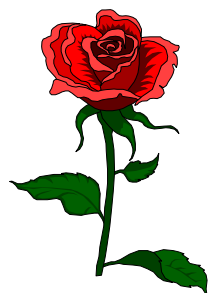
↖ *Naturopathes*

↖ *Ostéopathes*

↖ *Spécialistes*

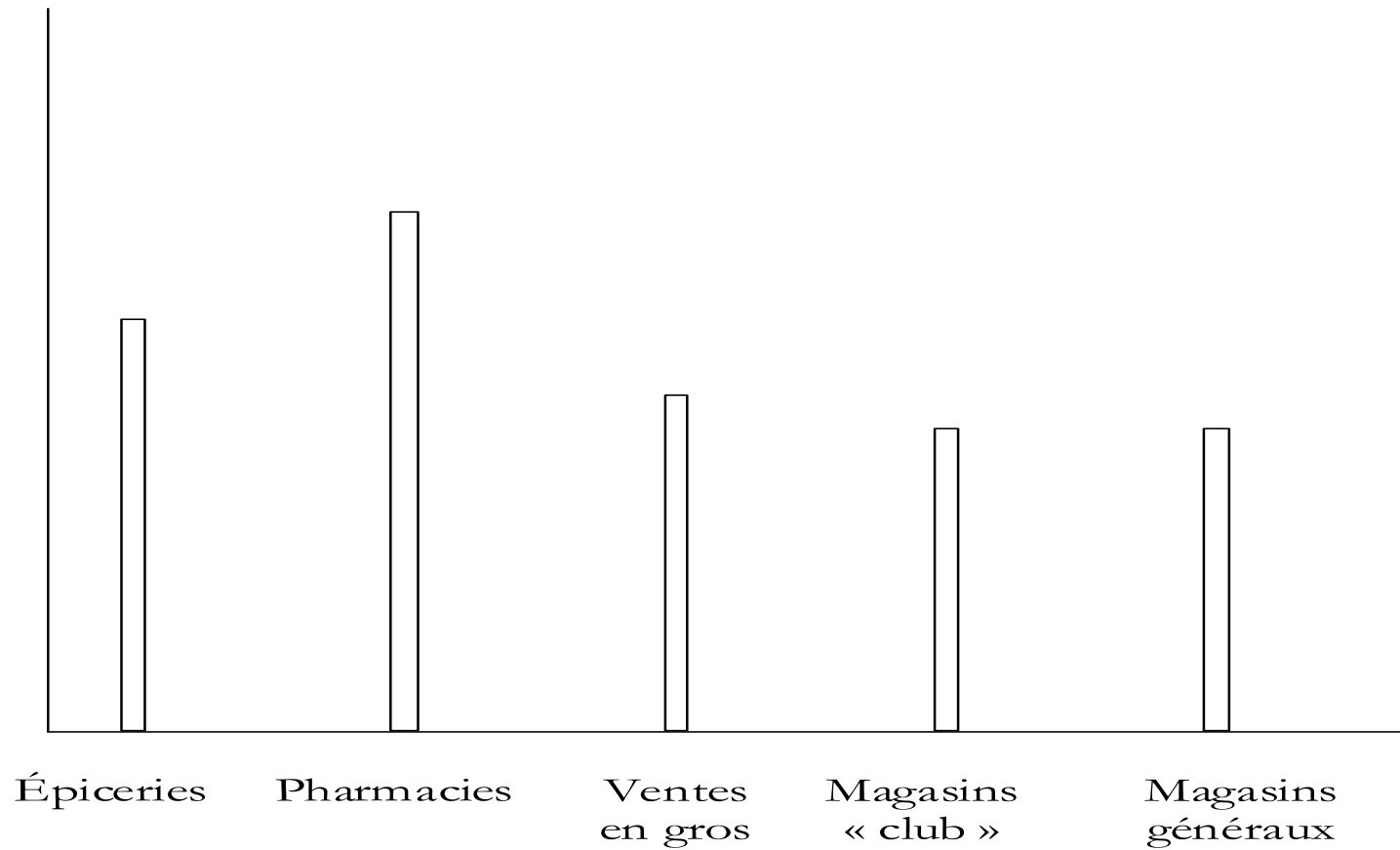
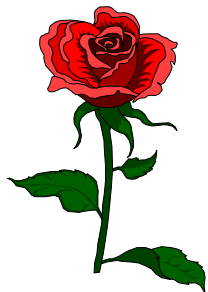
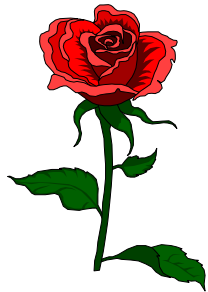
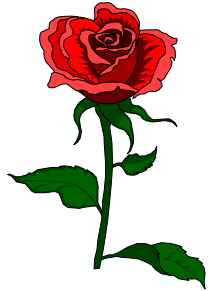
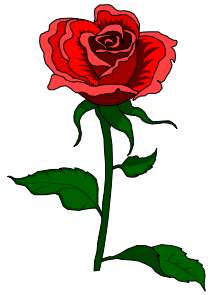
↖ *Autres*

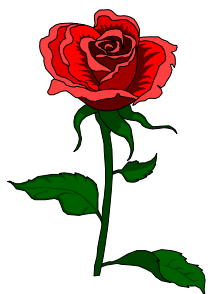
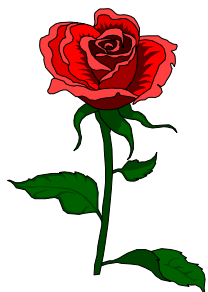
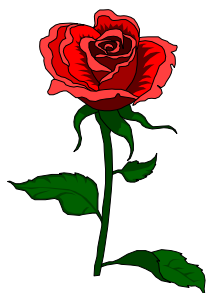
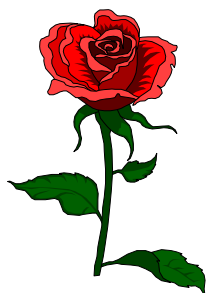
Prix relatifs en fonction des canaux de distribution



Prix relatifs

Mass Market





Prix de vente des plantes est fonction de :



Nature (espèce)



Source



Culture



Présentation



Qualité



Partie utilisée



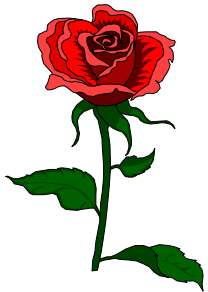
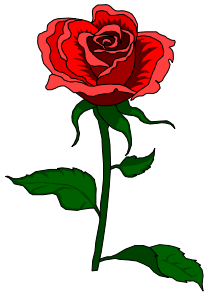
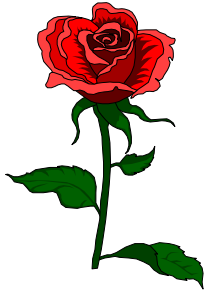
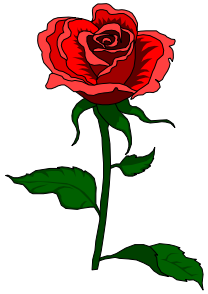
Pourcentage d'humidité



Marché visé

Niveau de transformation

Plantes indigènes

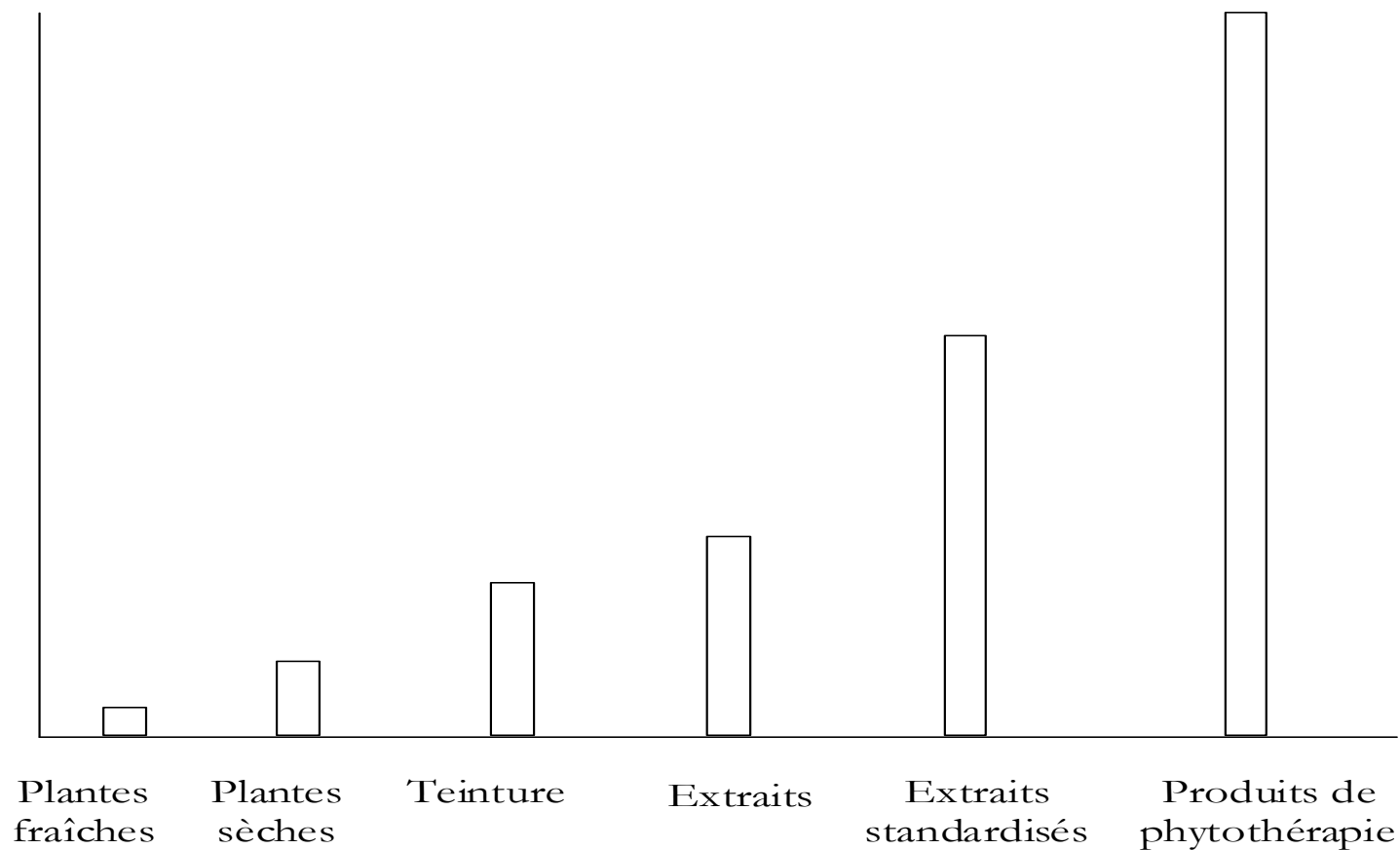
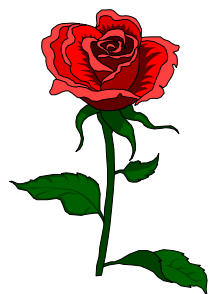
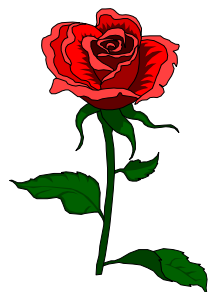
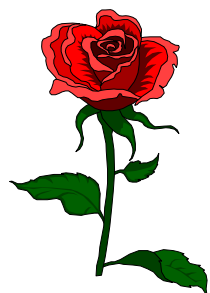
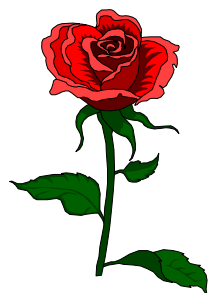


↖ *Bourgeons - sèves*

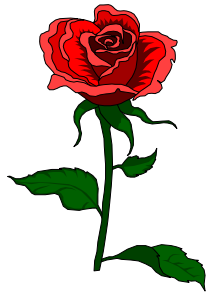
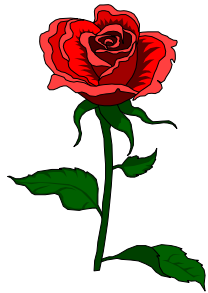
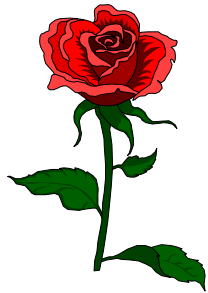
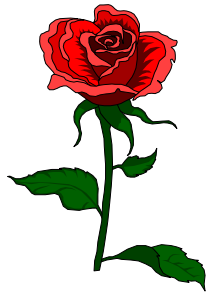
↖ *Champignons*

↖ *Complexité d'imposer une plante indigène*

Valeur relative des plantes transformées

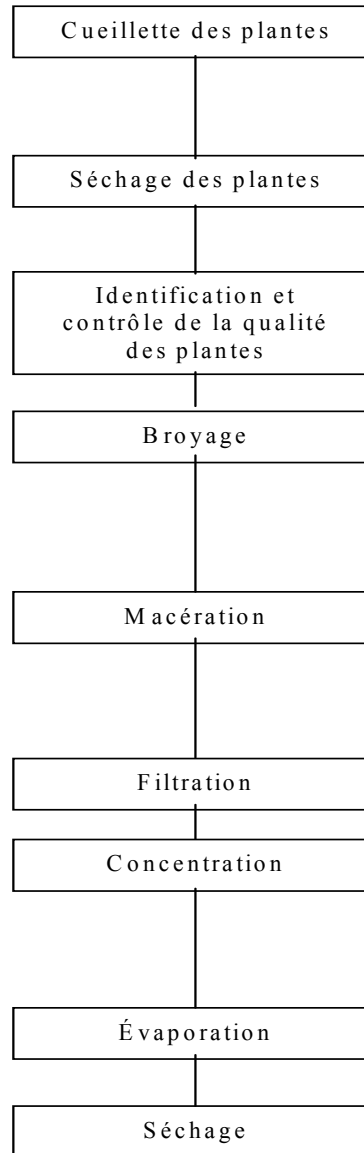


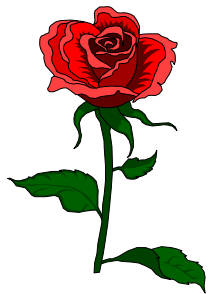
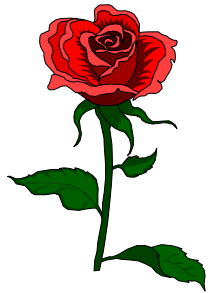
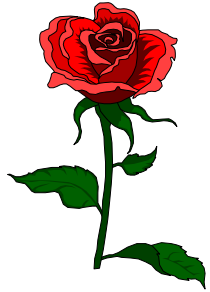
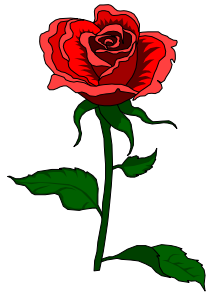
Procédé de transformation des plantes



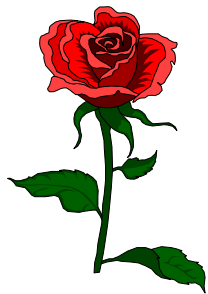
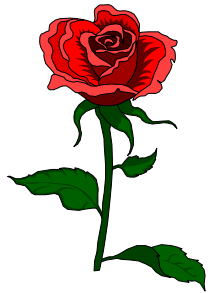
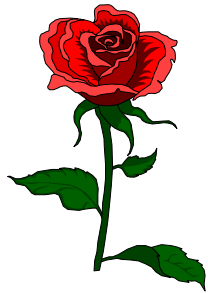
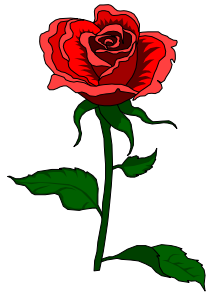
Contrôle
de la
qualité

Procédé général





Consummation



Groupes de produits contenant des plantes



Suppléments



Produits homéopathiques



Produits de soins personnels (cosmétiques, etc.)



Produits pour les sportifs



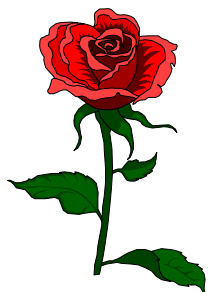
Produits vétérinaires



Produits respectueux de l'environnement

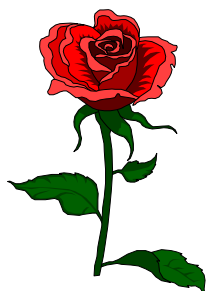


Produits nutraceutiques



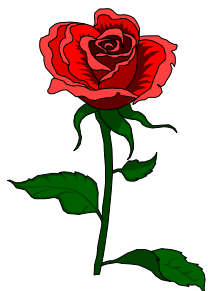
Utilisation des plantes médicinales

Les plantes médicinales peuvent être utilisées dans plusieurs groupes de produits qui ne sont pas nécessairement des produits thérapeutiques.



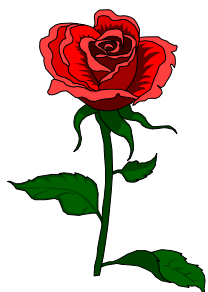
- ↖ *Aromathérapie*
- ↖ *Huiles essentielles (parfum)*
- ↖ *Huile de massage*
- ↖ *Crème et onguent médicinaux*

- ↖ *Nutraceutiques*
- ↖ *« Smart » drinks*
- ↖ *Boissons gazeuses*
- ↖ *Nourriture pour les animaux*



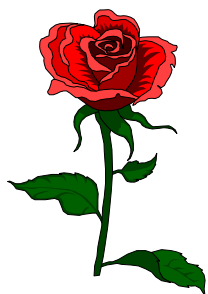
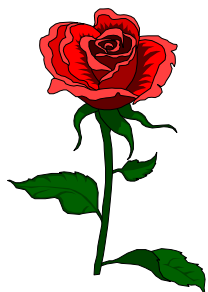
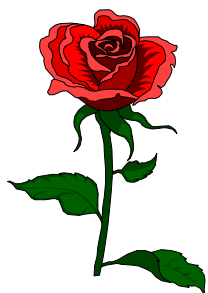
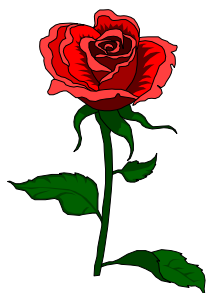
- ↖ *Comprimés, gélules, dragées*
- ↖ *Produits d'hygiène personnelle*
- ⤵ *Produits pour les cheveux*
- ⤵ *Soins de la bouche*

- ↖ *Produits pour les sportifs*
- ↖ *Sirops*
- ↖ *Tisanes*
- ↖ *Produits en aérosol pour la gorge*



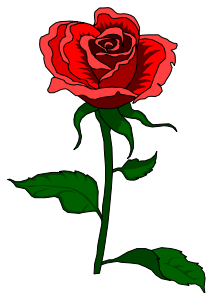
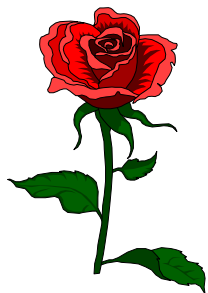
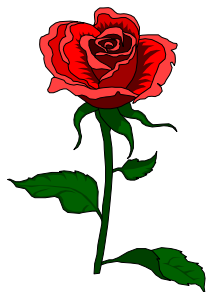
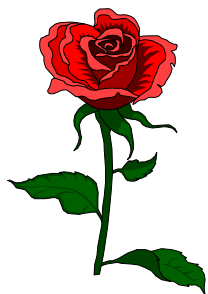
- ⤵ *Préparations pour le bain*
- ⤵ *Cosmétiques*
- ⤵ *Produits de beauté*

- ↖ *Vitamines, suppléments associés aux plantes*
- ↖ *Produits amincissants*
- ↖ *Produits favorisant la prise de poids*
- ↖ *Homéopathie*



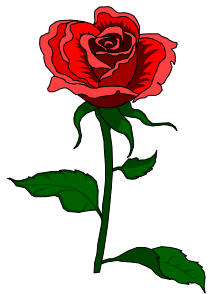
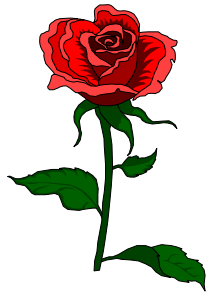
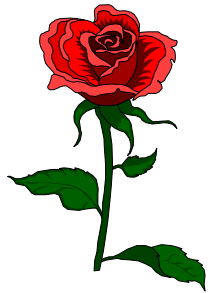
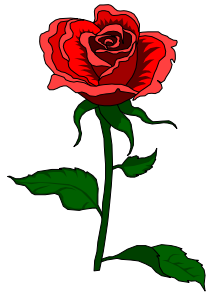
Principales utilisations thérapeutiques des plantes et dérivés

<i>Affections</i>	<i>% d'utilisation</i>
<i>Constipation</i>	62 %
<i>Rhume – grippe</i>	50 %
<i>Fatigue</i>	49 %
<i>Stress</i>	47 %
<i>Insomnie</i>	27 %
<i>Minceur</i>	30 %
<i>Rhumatismes</i>	18 %
<i>Problèmes urinaires</i>	22 %
<i>Désintoxicant général</i>	32 %

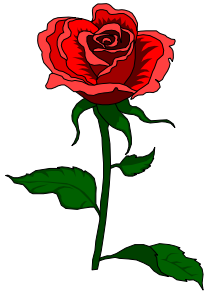


Formes galéniques consommées

<i>Gélules</i>	<i>53 %</i>
<i>Comprimés</i>	<i>15 %</i>
<i>Tisanes</i>	<i>11,4 %</i>
<i>Teintures</i>	<i>7,3 %</i>
<i>Divers</i>	<i>7,4 %</i>
<i>Vrac</i>	<i>5,3 %</i>
<i>Autres</i>	<i>0,6 %</i>



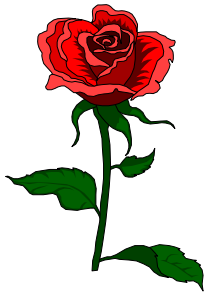
Canada



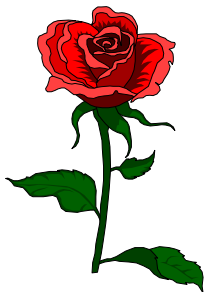
Profil de l'utilisateur de plantes et produits naturels



➤ *Depuis 5 ans, croissance de 81 % du nombre d'utilisateur de médecines alternatives*



➤ *18 – 34 ans —————> Hausse de 146 %*



➤ *50 ans et + —————> Tranche principale des utilisateurs de plantes et produits naturels*

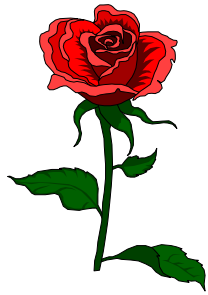


Marché des plantes médicinales au Canada

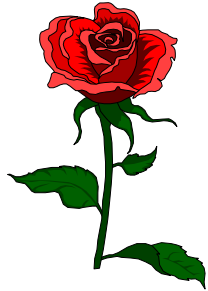
2001	→	480 millions \$CAN
2000	→	420 millions \$CAN
1999	→	380 millions \$CAN

Selon A.C. Nielsen

- *Ventes en pharmacie croissent de 20 à 30 %*
- *Magasins de santé croissent de 10 à 20 %*

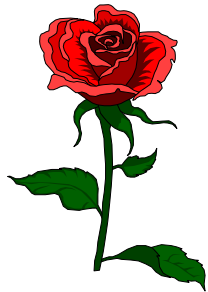


Contrôle canadien de l'industrie



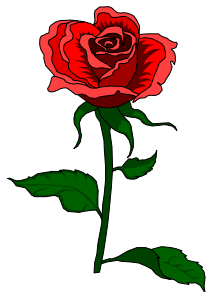
Détaillants

99 %



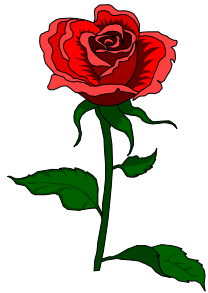
Distributeurs

94 %

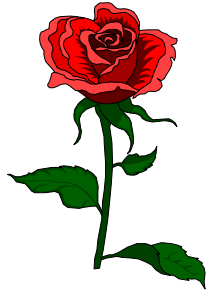


Fabricants

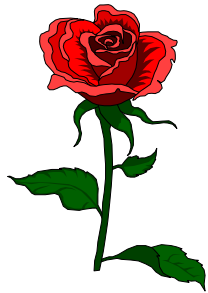
88 %



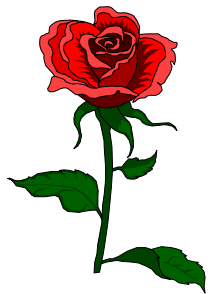
Sources d'approvisionnement des sociétés québécoises



↖ *Importation directe*



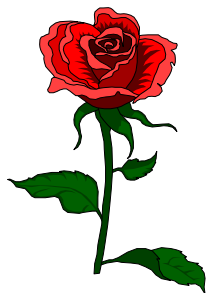
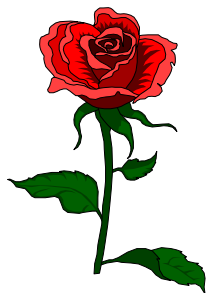
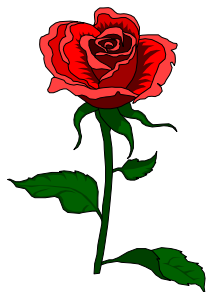
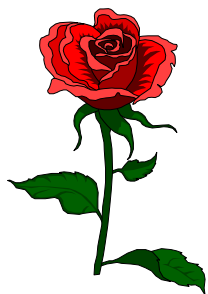
↖ *Achat à des négociants qui importent de
plusieurs pays (incluant la Chine et l'Inde)*



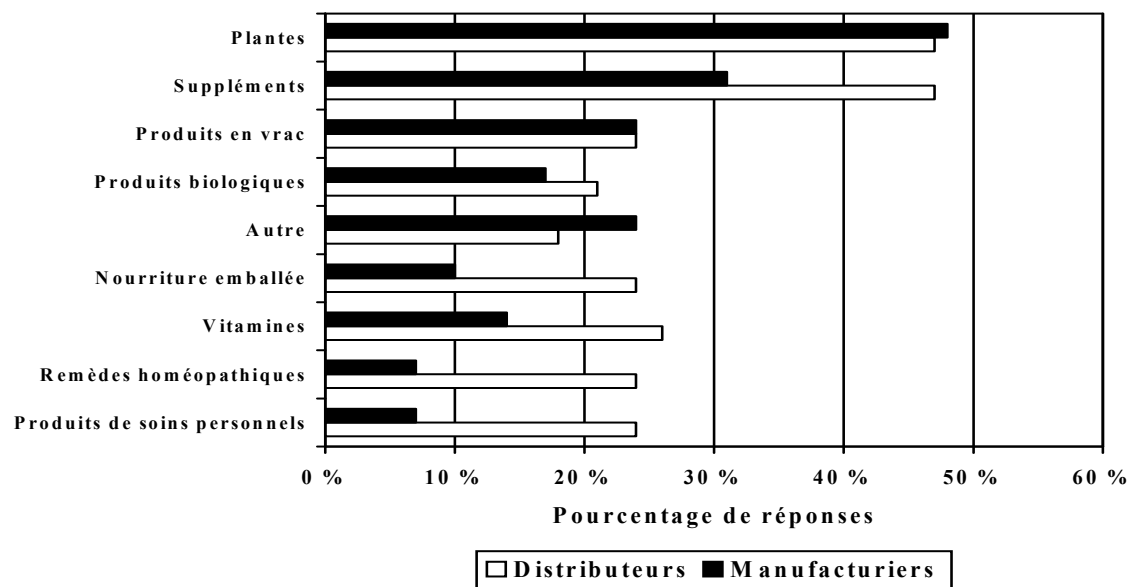
↖ *Plusieurs plantes classées dans les 50 plantes les
plus consommées sont d'origine exotique*

↖ *Très peu d'achats sont effectués localement*

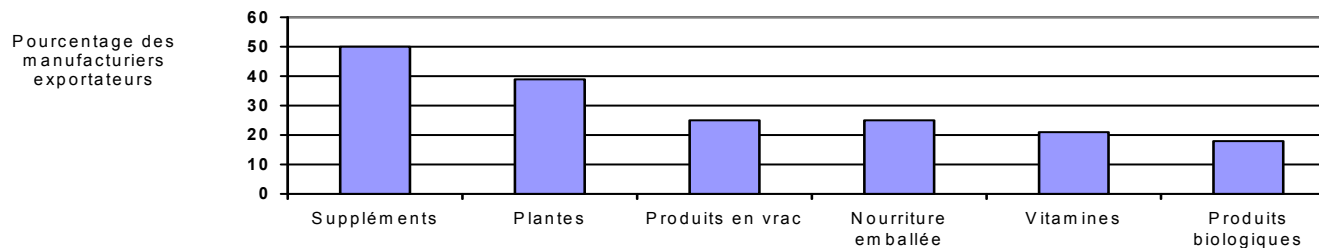
↖ *Matières premières canadiennes ou importation*



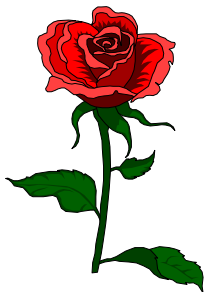
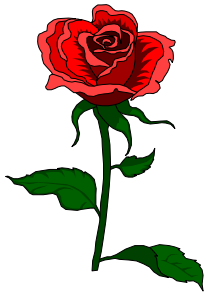
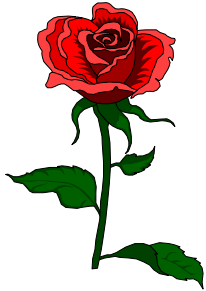
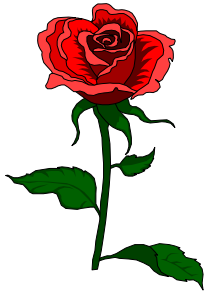
Produits les plus couramment importés



Produits les plus couramment exportés : manufacturiers



Plantes les plus vendues



↖ *Ginkgo biloba*

↖ *Echinacea*

↖ *Ail*

↖ *Ginseng*

↖ *Millepertuis*

↖ *Valériane*

↖ *Kava kava*

↖ *Camomille*

↖ *Pissenlit*

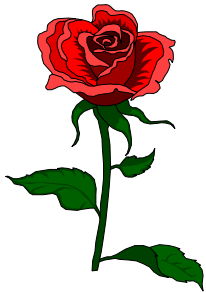
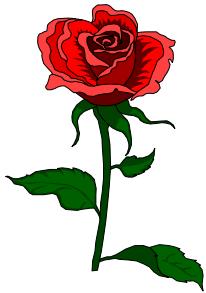
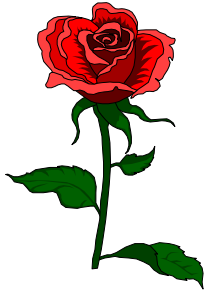
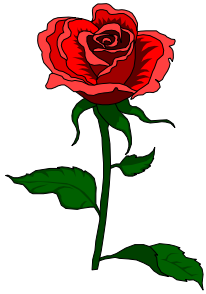
Variation des ventes

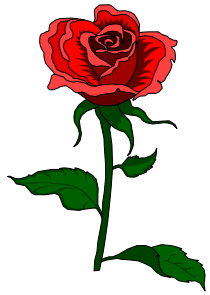
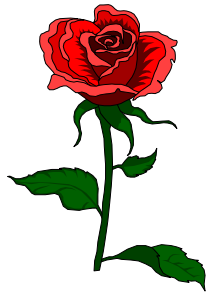
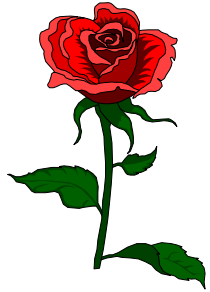
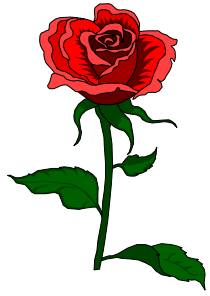
Plantes de mode 2000 – 2001

<i>Plantes</i>	<i>% de diminution</i>
<i>Ginko biloba</i>	- 14,7 %
<i>Ginseng</i>	- 9,6 %
<i>Millepertuis</i>	- 27,1 %
<i>Kava kava</i>	- 23,3 %

Plantes classiques 2000 – 2001

<i>Plantes</i>	<i>% d'augmentation</i>
<i>Valériane</i>	0,5 %
<i>Chardon Marie</i>	15,5 %
<i>Feuille d'olivier</i>	94,8 %
<i>Réglisse</i>	47,2 %
<i>Menthe poivrée</i>	14,6 %
<i>Pissenlit</i>	9,1 %

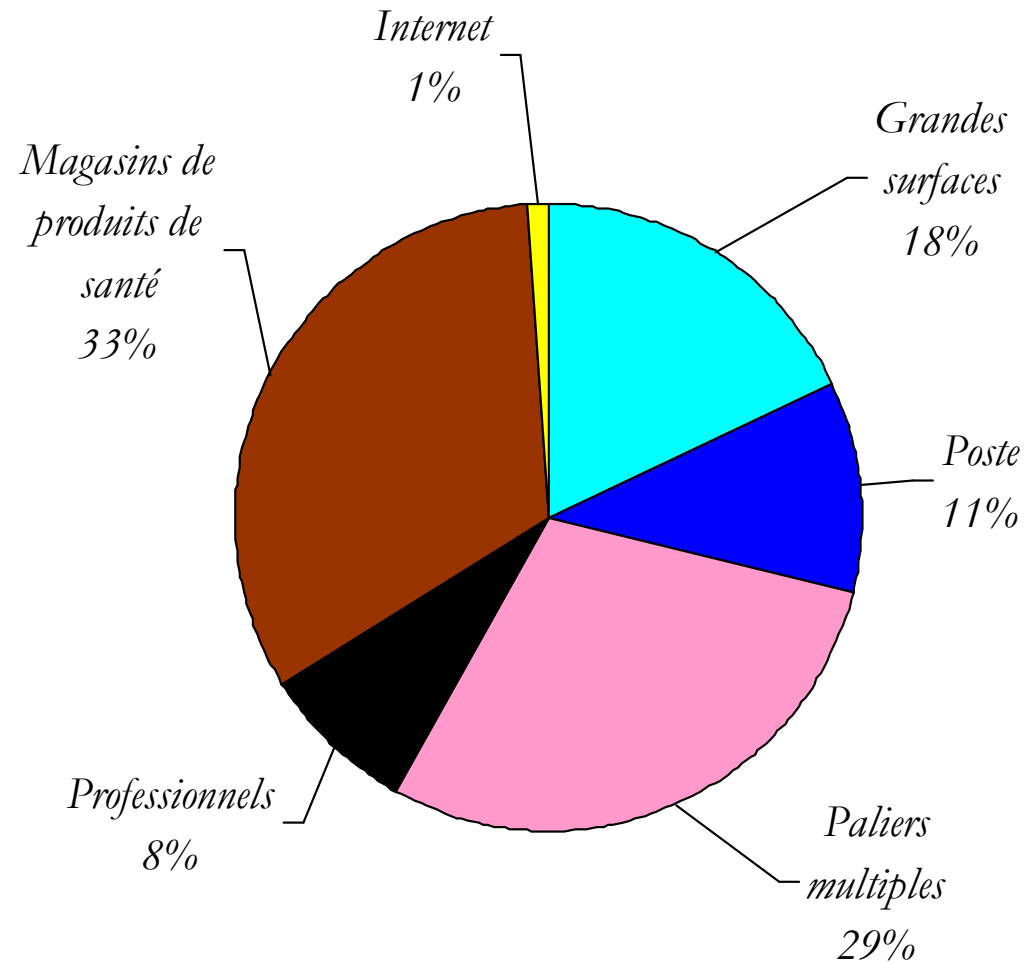
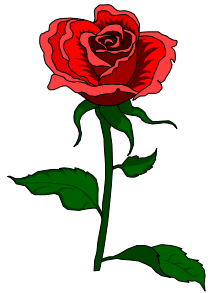
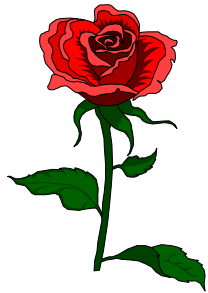
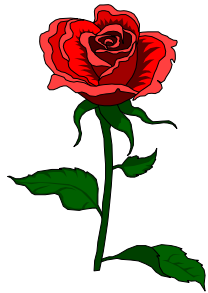
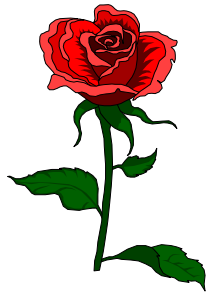


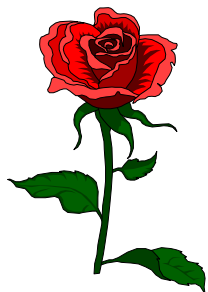
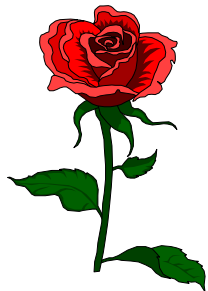
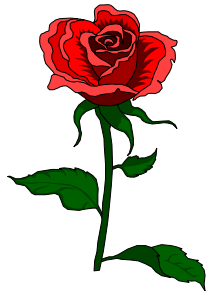
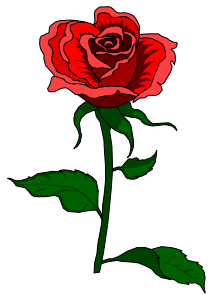


États-Unis

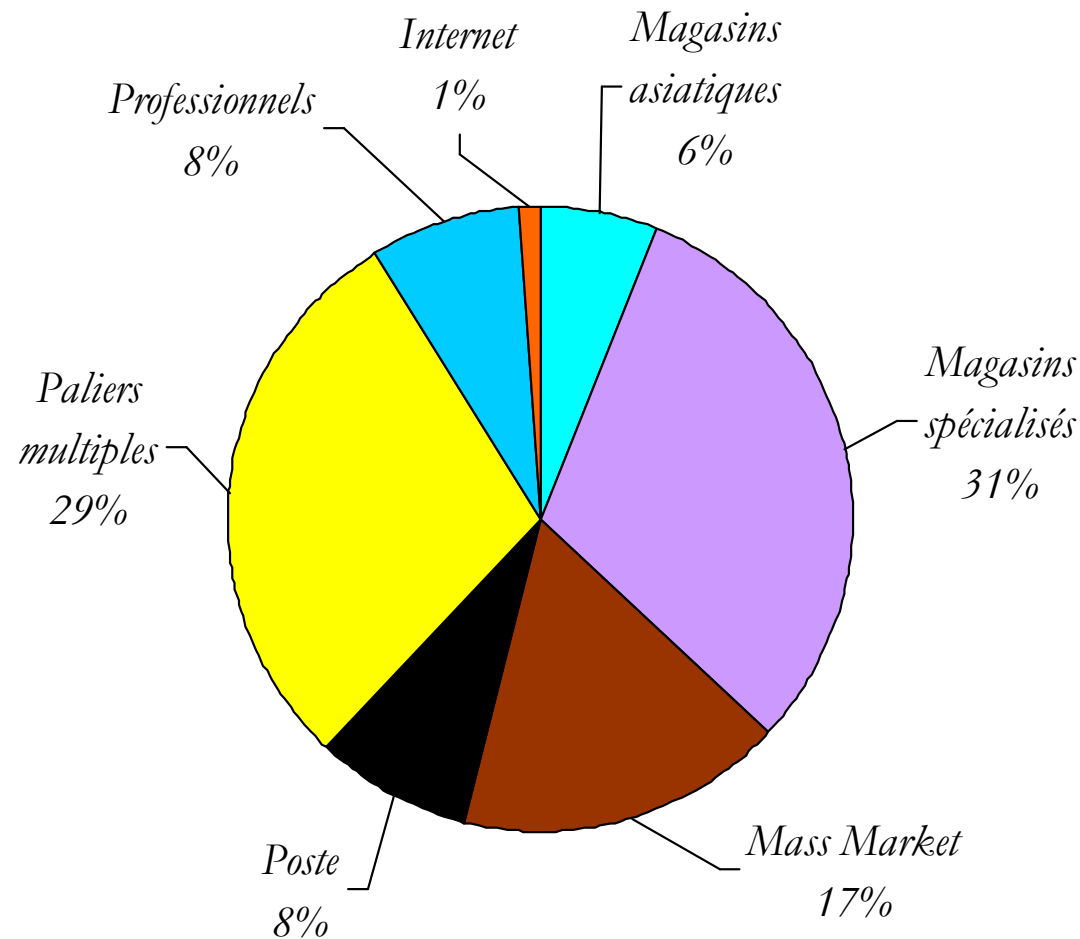
Vente de plantes aux États-Unis en 2001

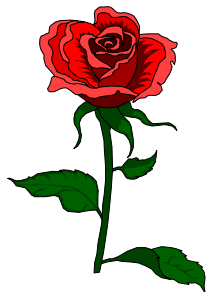
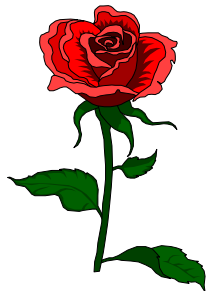
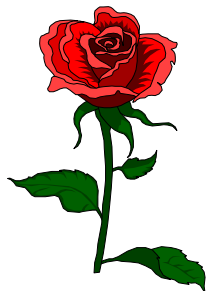
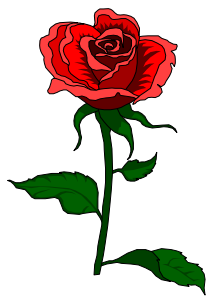
\$4,2 milliards de dollars



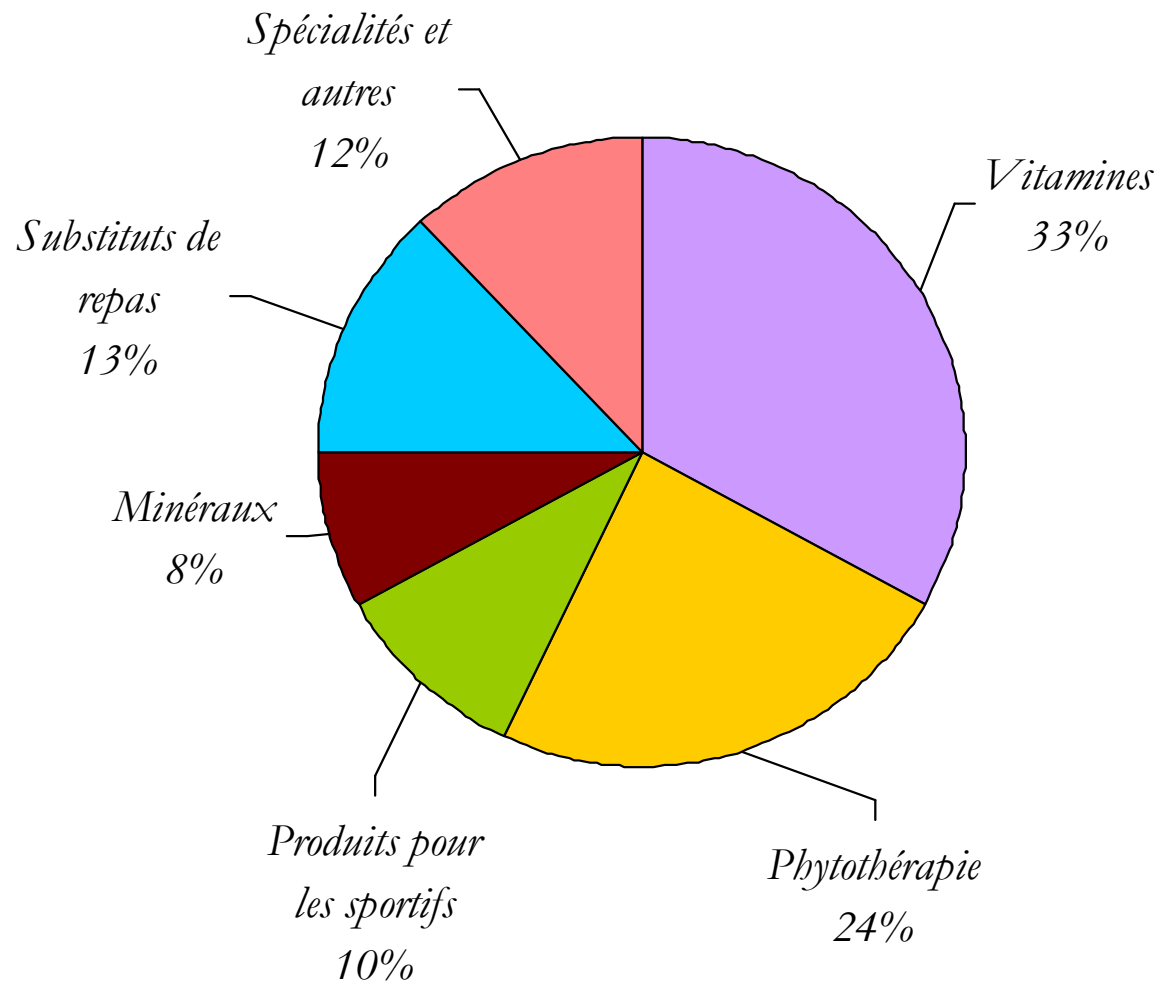


Ventes de plantes par réseaux aux États-Unis 4,2 milliards de dollars en 2001



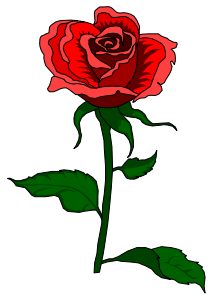
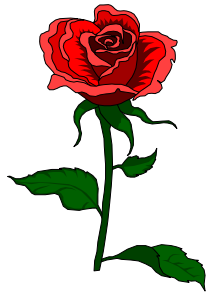
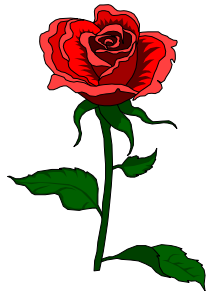
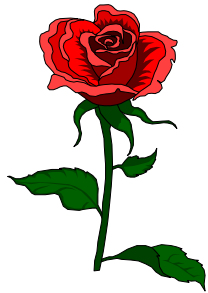


Ventes de suppléments alimentaires aux États-Unis 17,6 milliards de dollars en 2001



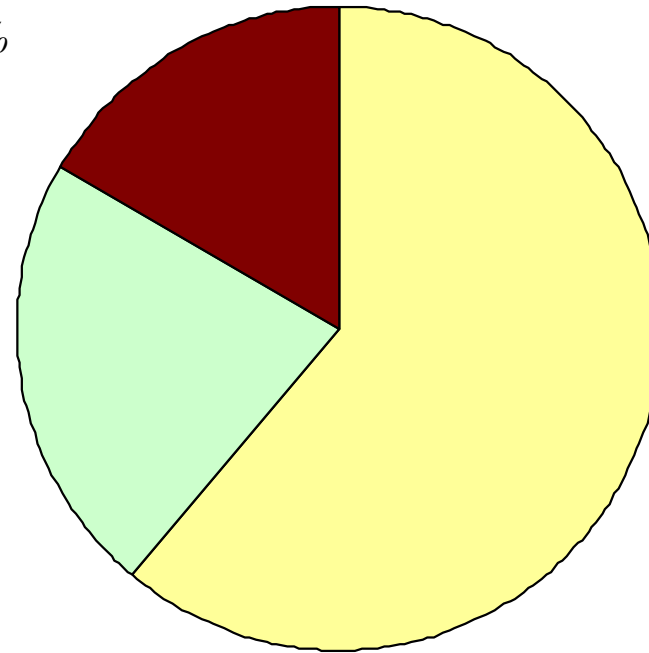
Ventes des produits de santé aux États-Unis

184 milliards de dollars en 2000



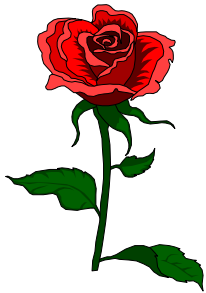
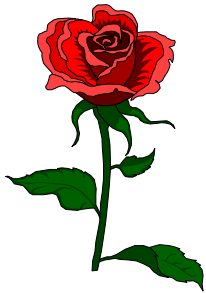
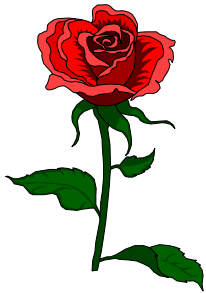
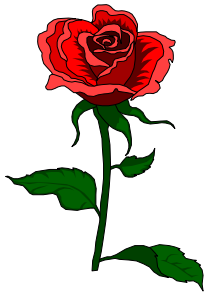
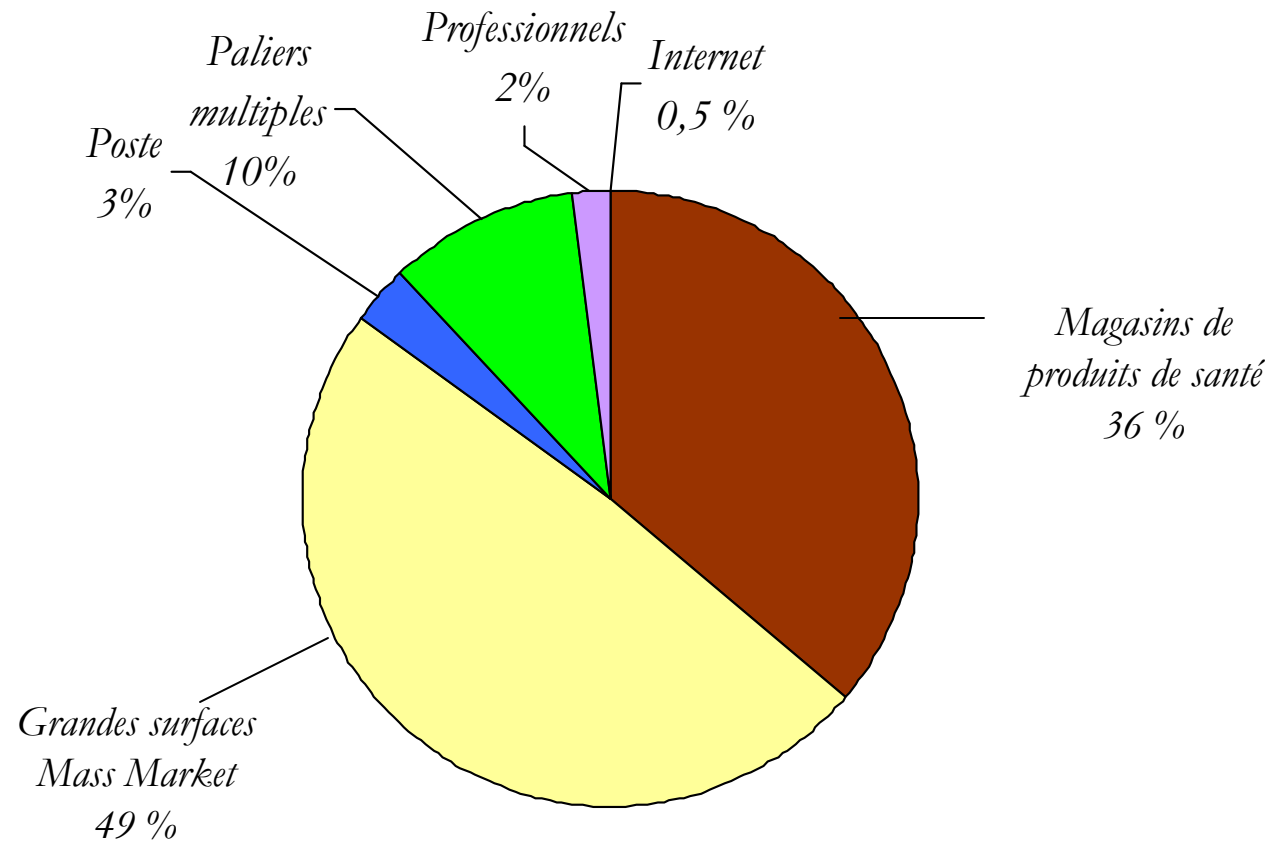
*Suppléments
alimentaires*
17%

OTC
22%



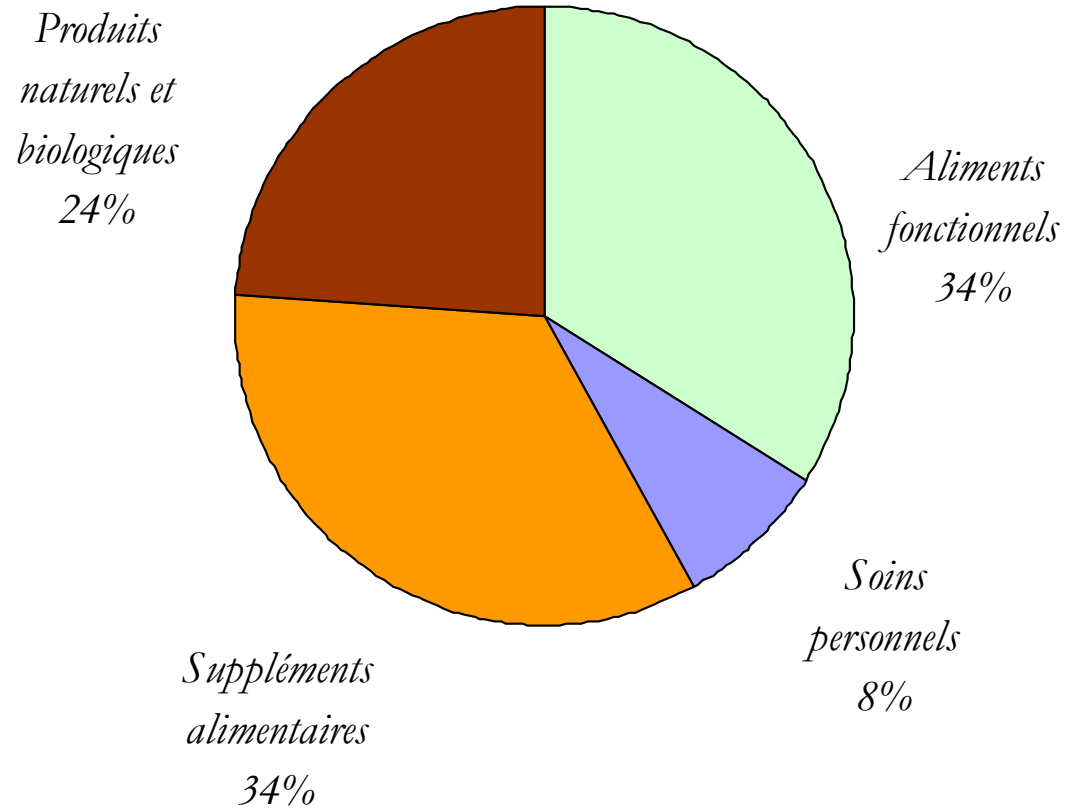
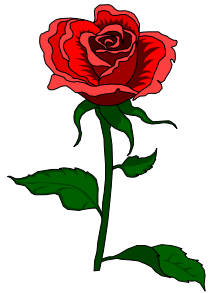
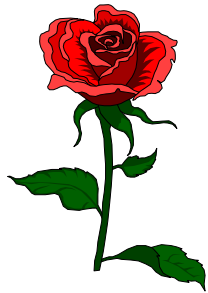
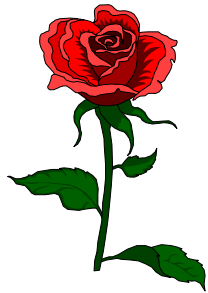
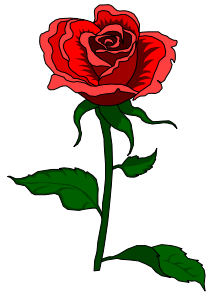
*Produits
pharmaceutiques sous
ordonnances*
61 %

*Ventes des produits nutritionnels
par canaux de distribution aux États-Unis
53 milliards de dollars en 2001*

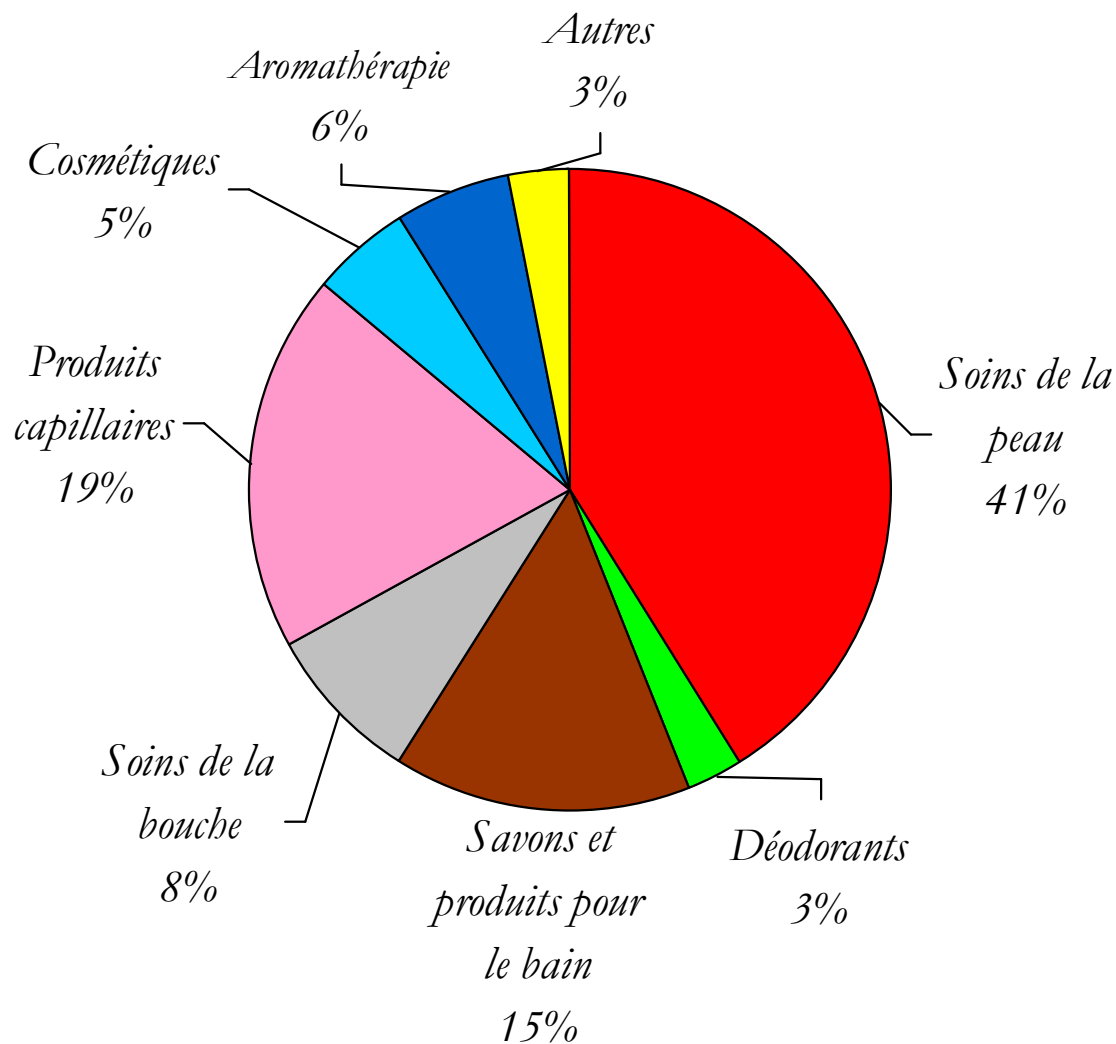
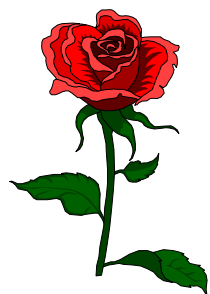
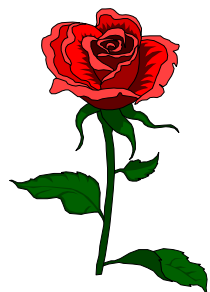
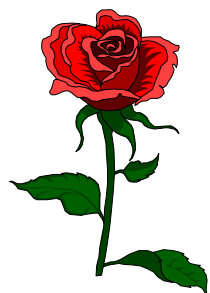
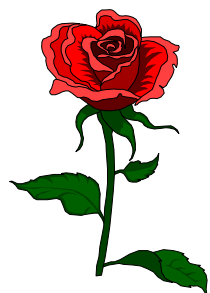


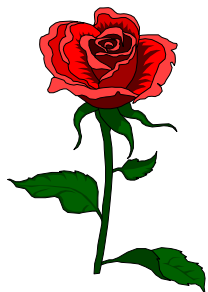
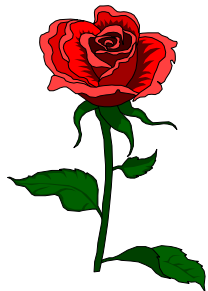
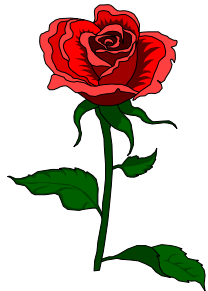
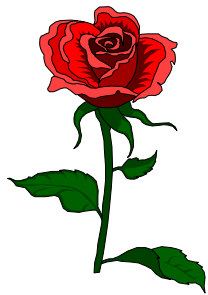
Industrie des produits nutritionnels aux États-Unis

53 milliards de dollars en 2001

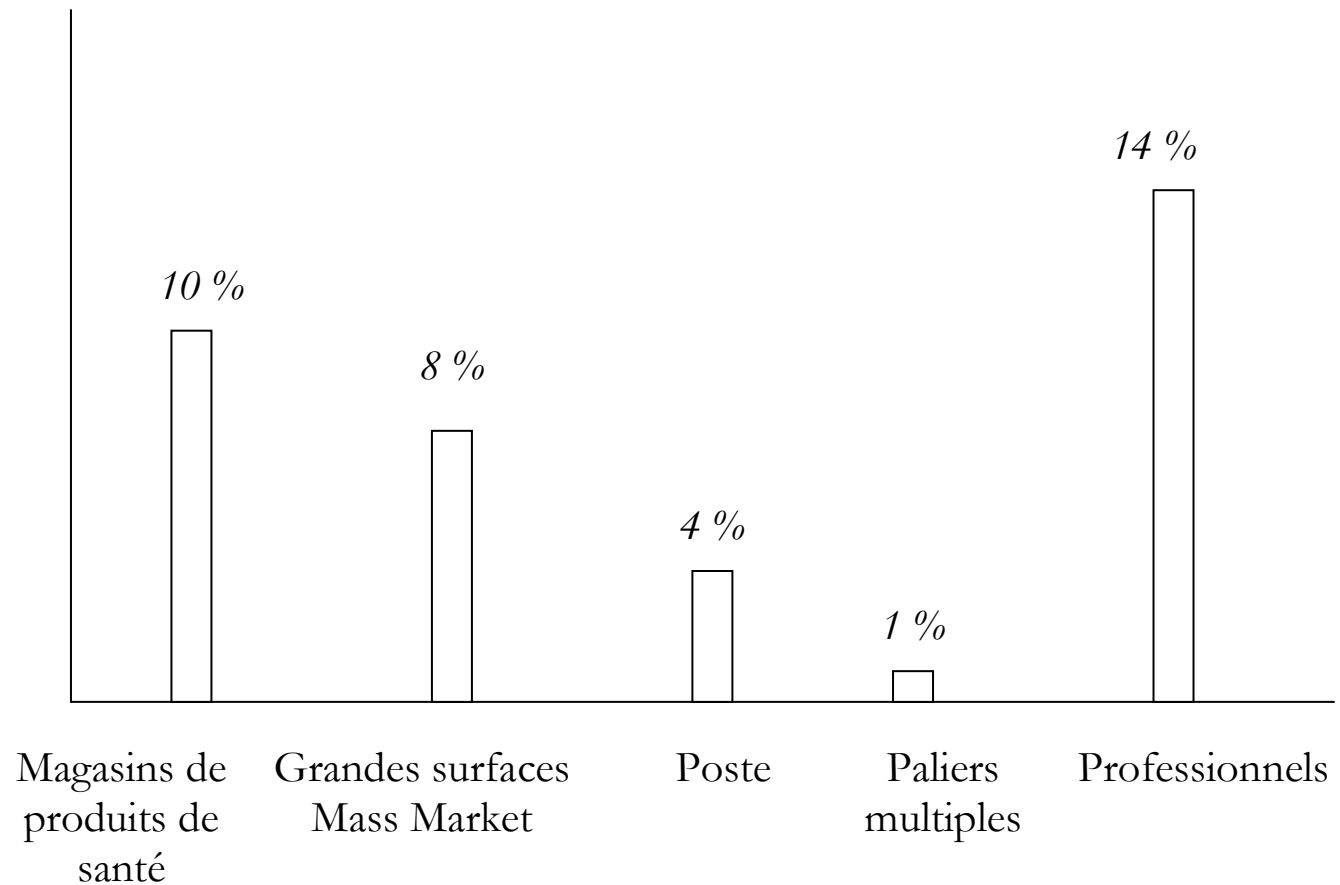


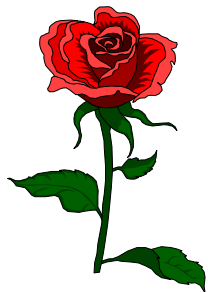
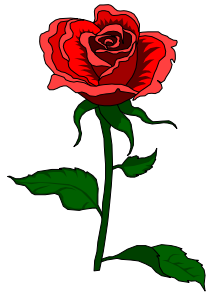
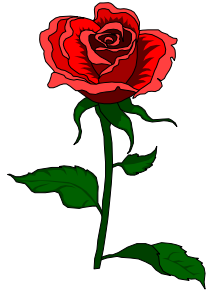
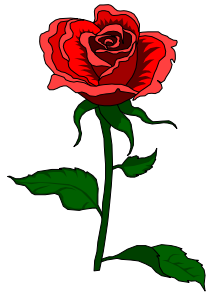
Répartition des ventes de produits de soins personnels aux États-Unis en 2000
3,8 milliards de dollars



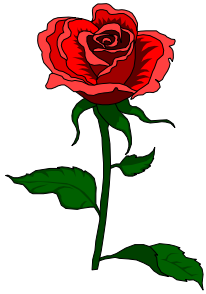


*Croissance des ventes de produits de soins personnels
par canaux de distribution aux États-Unis
3,8 milliards de dollars en 2000*

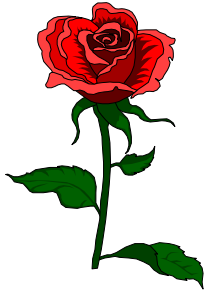




*Évolution
du
marché*



Quels sont les facteurs qui peuvent influencer la croissance ou la décroissance du marché des plantes médicinales ?



Les médias



Un surplus de produits disponibles



Les grandes surfaces à escompte



Les consommateurs



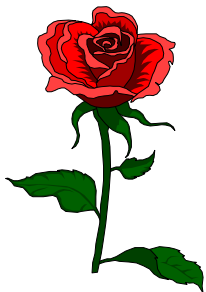
L'industrie

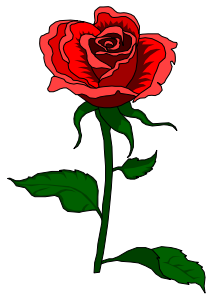
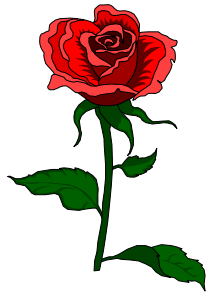
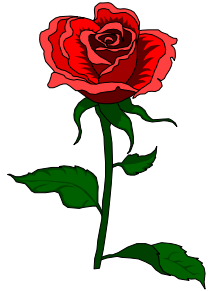
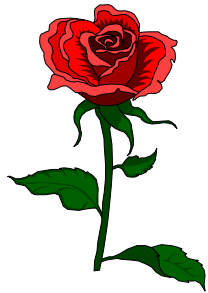


Les gouvernements



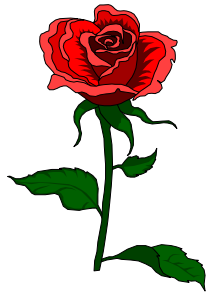
Renversement de la situation économique



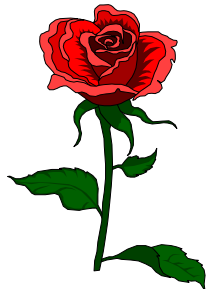


Facteurs déterminant l'évolution du marché américain des plantes médicinales

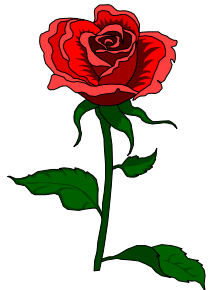
- ↖ *Économie*
- ↖ *Éducation du consommateur*
- ↖ *Découverte ou développement de nouveaux produits*
- ↖ *Intervention positive des médias*
- ↖ *Résultats d'études scientifiques et cliniques*
- ↖ *Réglementation positive*
- ↖ *Sécurité des produits*
- ↖ *Prix*



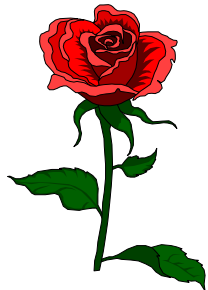
Comment peut-on influencer les tendances négatives touchant la consommation des plantes ?



↖ *Publicité positive sans fausse promesse*

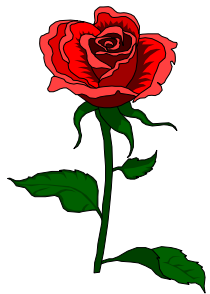
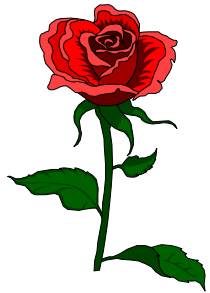
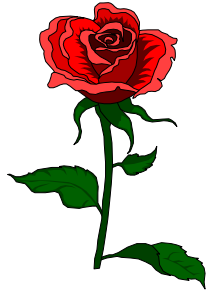
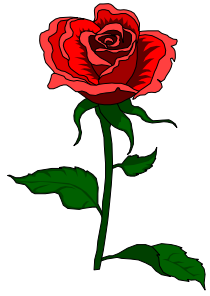


↖ *Implication des professionnels de la santé*



↖ *Autorégulation par l'industrie*

↖ *Réglementation gouvernementale appliquée et ce, surtout de façon positive*



Conclusion