Encise 1H FY 2017 Snapshot

（NHI Price Based）

（04/2017 to 09/2017）

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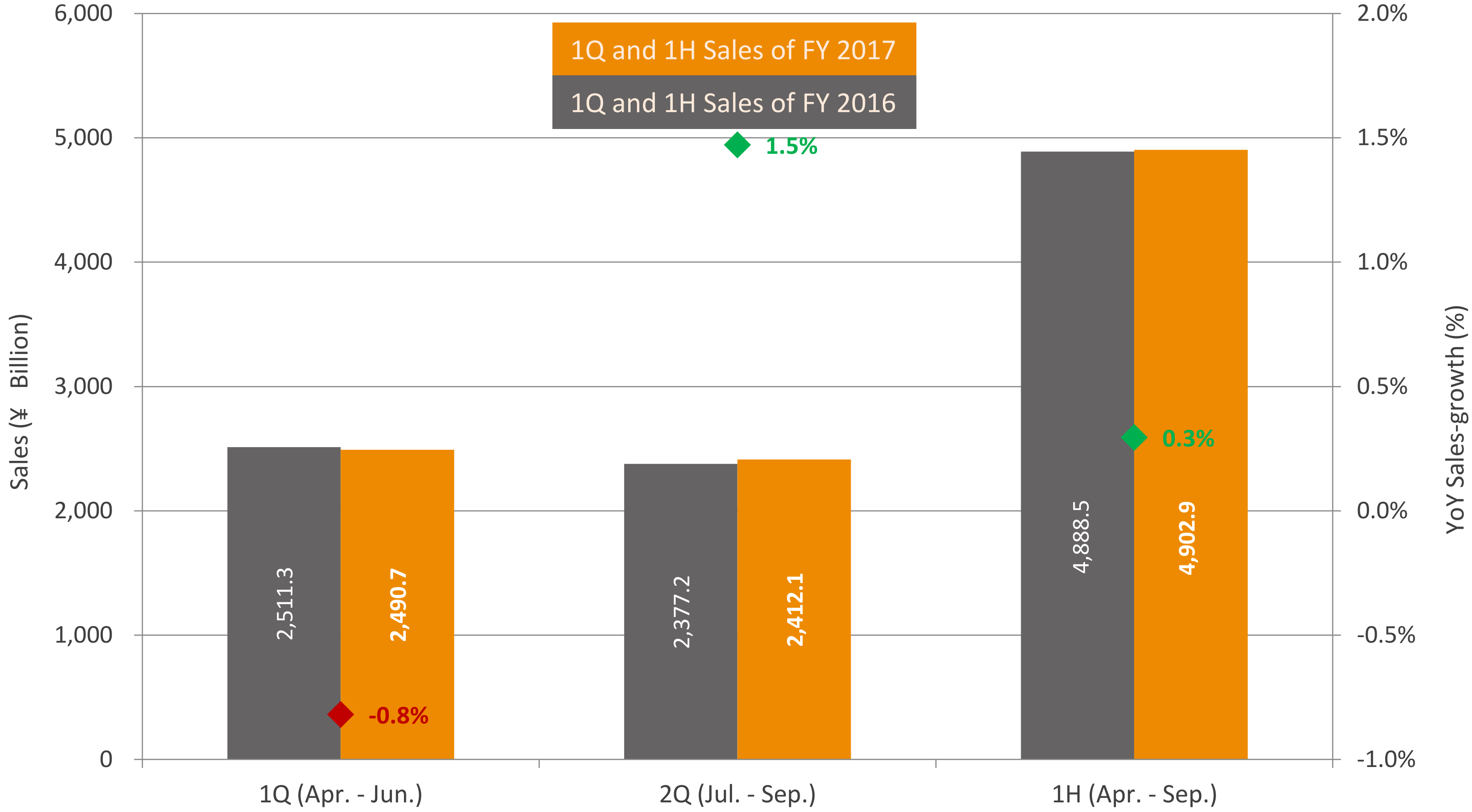
Period at Glance (YoY)



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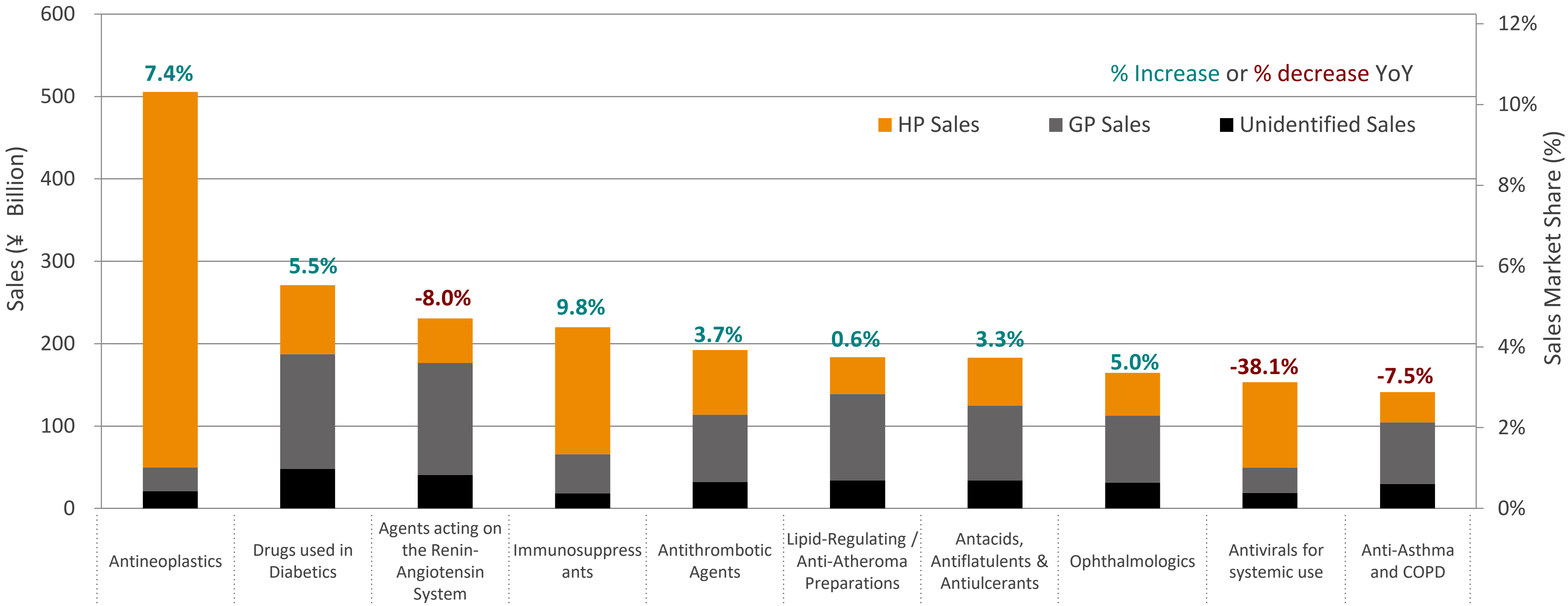
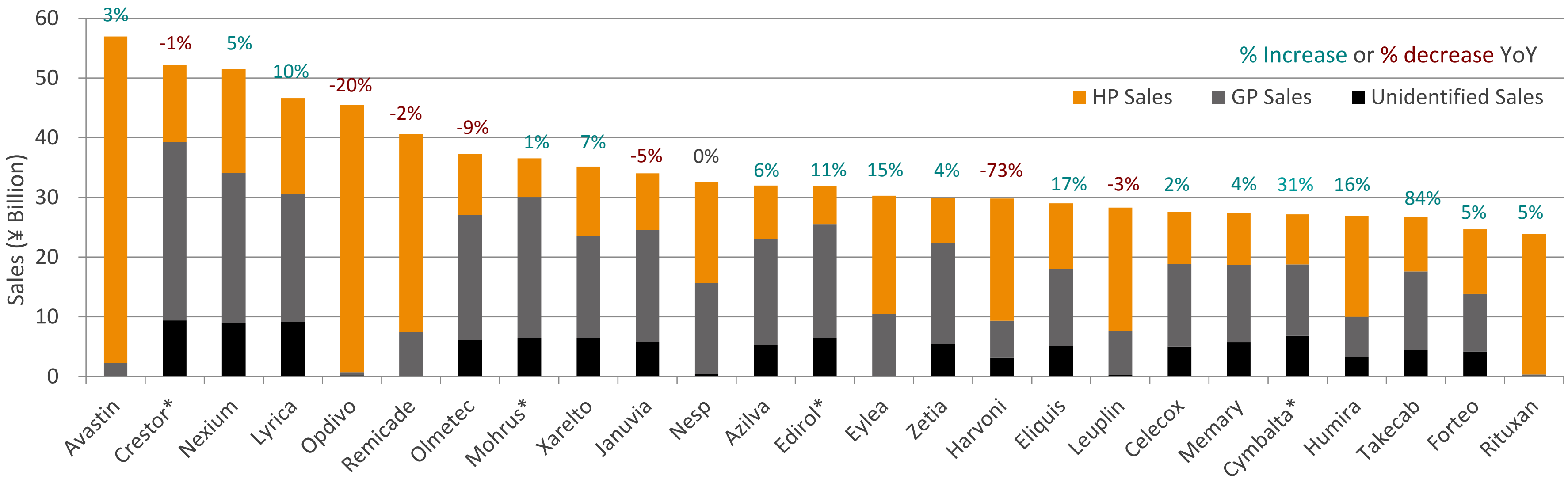
Top-10 Therapeutic Classes by Sales



Sales Break-up Definition: **Hospital (HP) Sales:** All sales generated to the pharmacies from hospitals of 100+ beds, plus their in-house purchase | **General Practitioners (GP) Sales:** All sales generated to the pharmacies from general practitioners and all clinics/ hospitals of <100beds, plus their in-house purchase | **Unidentified Sales:** Sales not clearly linked to above two categories

- Top-10 Therapeutic Classes form ~45% of total Japan Pharma sales at ¥2,245 Billion (-1.6% YoY).
- **Antineoplastics (Oncology):** Growth maintained by contribution from new drugs including **Tagrisso** (**Osimertinib** from AstraZeneca, launched in May 2016 and posted ¥14.9 Billion), **Keytruda** (**Pembrolizumab** from MSD that started sales from February 2017 and contributed ¥16.6 Billion), **Cyramza** (**Ramucirumab** from Eli Lilly posted a robust growth of 60% YoY to ¥22.1 Billion) etc. These fresh contributions offset the sales decline impact of **Opdivo** (¥45.5 Billion, -20% YoY), the leading product of the Therapeutic class.
- **Antivirals:** -38.1% decline YoY was recorded largely due to – drop in sales of **Harvoni** (¥29.8 Billion, -73% YoY), **Sovaldi** (¥23.4 Billion, -46% YoY) and **Viekirax** (¥9.2 Billion, -54% YoY).
- **Immunosuppressants:** Posted 9.8% YoY growth backed by growing sales of **Revlimid** (¥23.1 Billion, 32% YoY), **Humira** (¥26.9 Billion, 16% YoY), **Simponi** (¥18.9 Billion, 25% YoY) etc.

Top-25 Brands by Sales



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* Combined sales from Co-Marketing companies

- Combined sales of top-25 pharmaceuticals brands for the 1H FY 2017 totaled ¥864.5 Billion and constituted 17.6% of the total Japan Pharma sales for the period.
- The combined sales of top-25 pharmaceuticals brands for the 1H FY 2017 dropped by 2 PP compared to 1H FY 2016 - largely due to decline in sales of **Harvoni** (-73% YoY) and **Opdivo** (-20% YoY).
- **Major Growing Brands:** included **Takecab** (**Vonoprazan**, a potassium-channel blocker, launched in February 2015 by Takeda, 84% YoY), **Cymbalta** (31% YoY), **Eylea** (15% YoY), **Edirol** (11 % YoY), and **Lyrica** (10% YoY).
- **Major Declining Brands:** included **Opdivo** (declining after 50% special price cut and launch of competitor drug **Keytruda** in February 2017), **Harvoni** (growth has decelerated following 'huge-seller re-pricing'), and **Olmetec** (following recently intensified GE competition in ARB space).
- **Brands Entering 'Top-25 Club' in 1H FY 2017 (on YoY basis):** Included **Cymbalta** (¥27.2 Billion), **Humira** (¥26.9 Billion), **Takecab** (¥26.8 Billion) and **Rituxan** (¥23.9 Billion).
- **Brands Exiting 'Top-25 Club' in 1H FY 2017 (on YoY basis):** Included **Sovaldi** (¥23.4 Billion), **Micardis** (¥22.4 Billion), **Zyprexa** (¥14.2 Billion) and **Plavix** (¥15.9 Billion).

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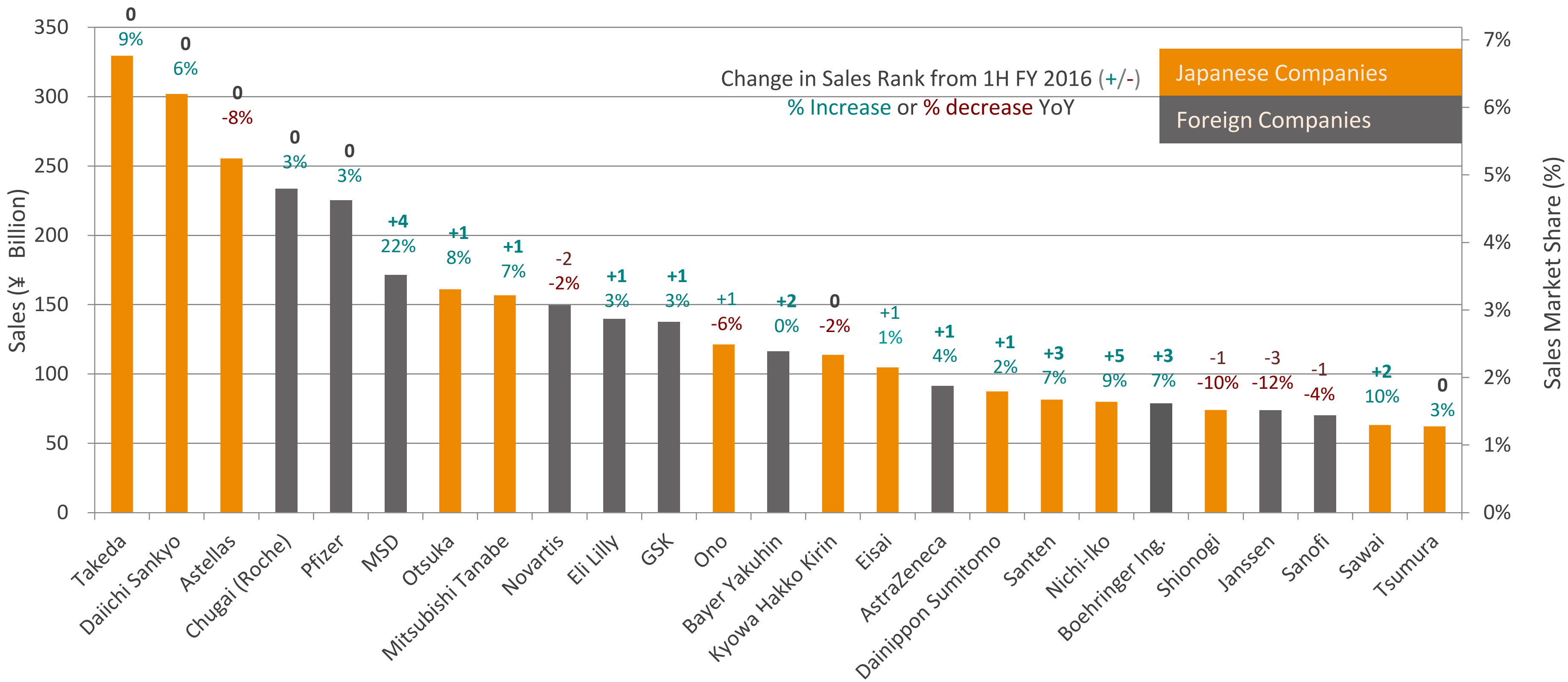
Top-25 Companies by Sales*



* Sales by Marketing Authorization Holder

- Combined sales of top-25 'marketing-companies' constitutes 71% (-0.3 PP YoY) of total Japan pharma sales at ¥3,480 Billion (-0.15% YoY) in the 1H of FY 2017.
- Among top-25 companies - sales ratio of Japanese Companies to Foreign Companies was ~57:43 (its was ~53:47 for the 1H FY 2016). Total sales of Japanese Companies among top-25 companies was ¥1,992.5 Billion (10.7% YoY), while for Foreign Companies was ¥1,487.5 Billion (-11.7% YoY) for the period.
- Among top-25 companies – **Sawai** (¥63.1 Billion, 10% YoY) was a new entry and it is now the second generic company to be in the top-25. **Gilead** (¥53.3 Billion, -65% YoY) on other hand lost its position from the list and plunged to 28th position as sales of its mainstay products Harvoni and Sovaldi dropped.

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