Encise FY 2017 Snapshot

（NHI Price Based）

（04/2017 to 03/2018）

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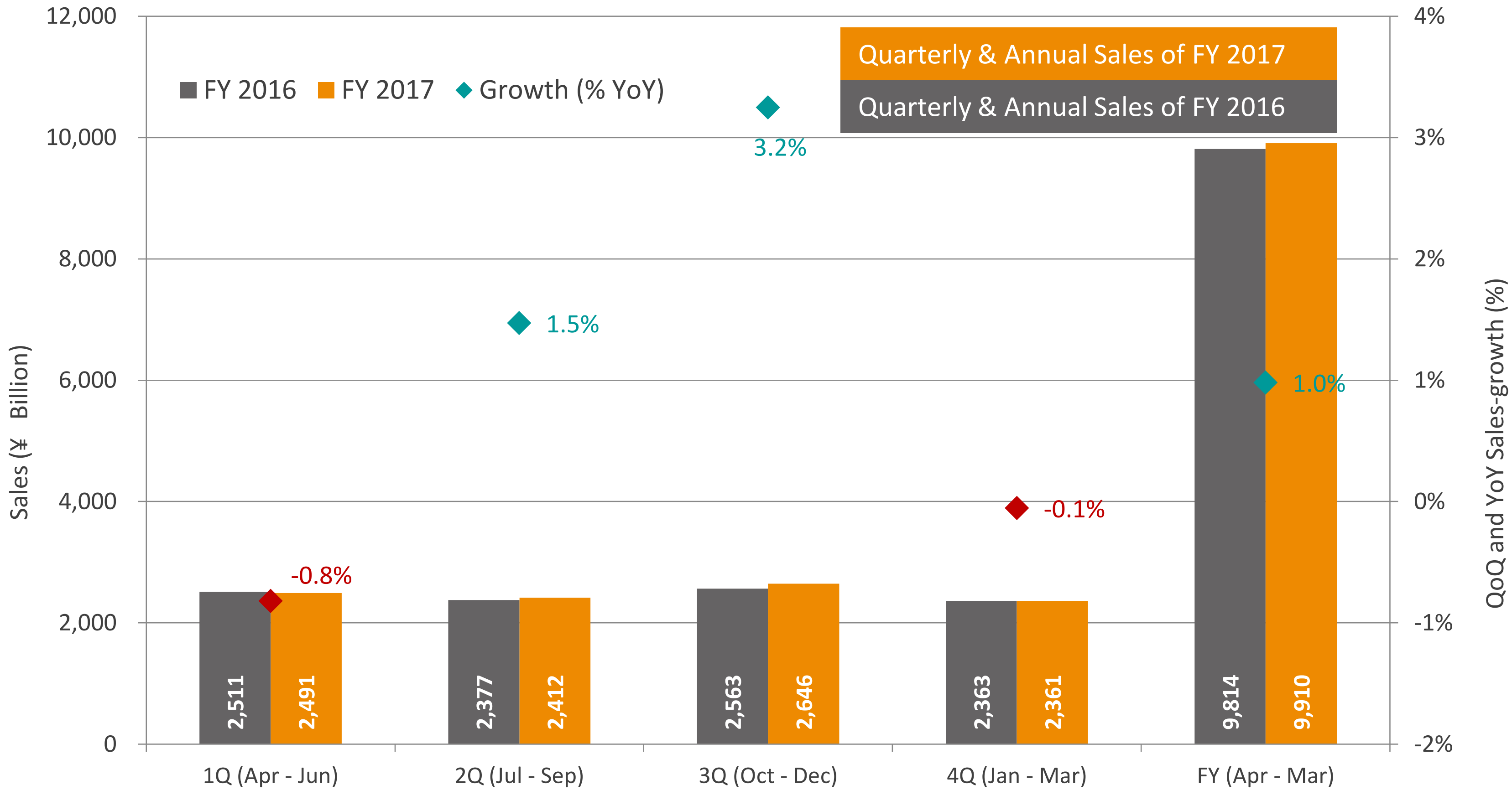

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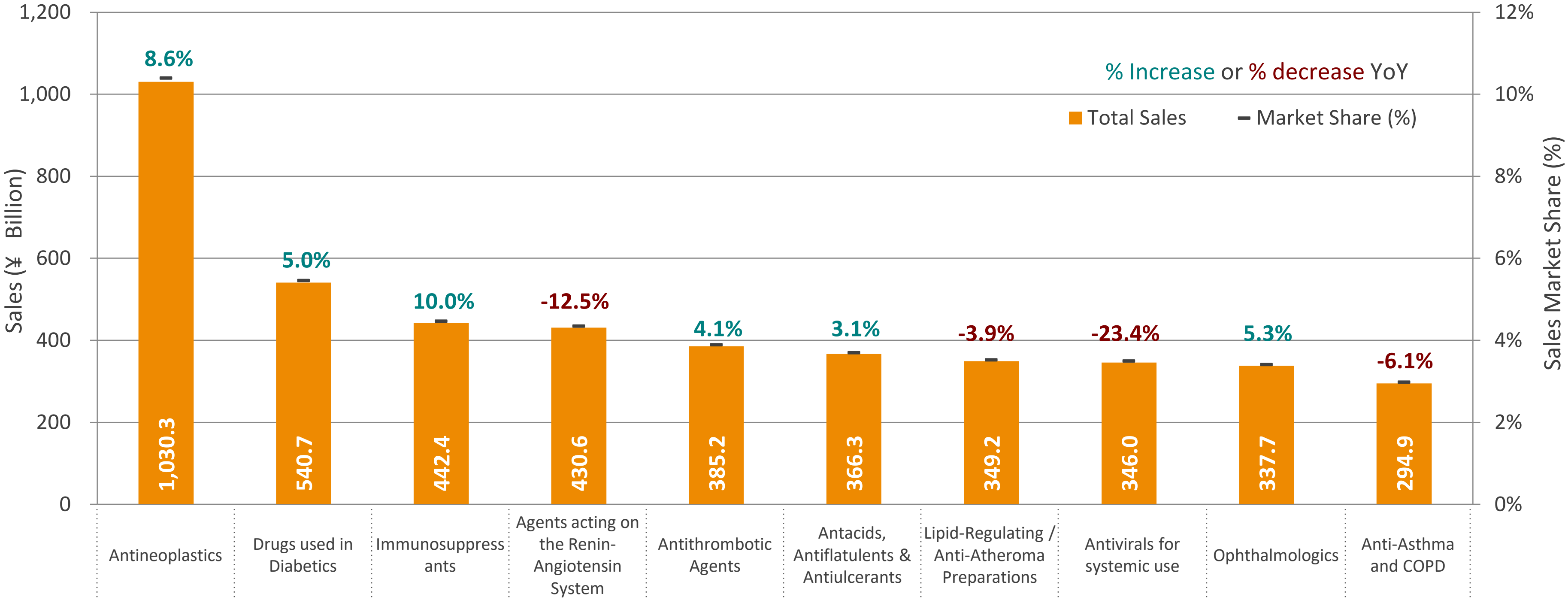
Top-10 Therapeutic Classes by Sales

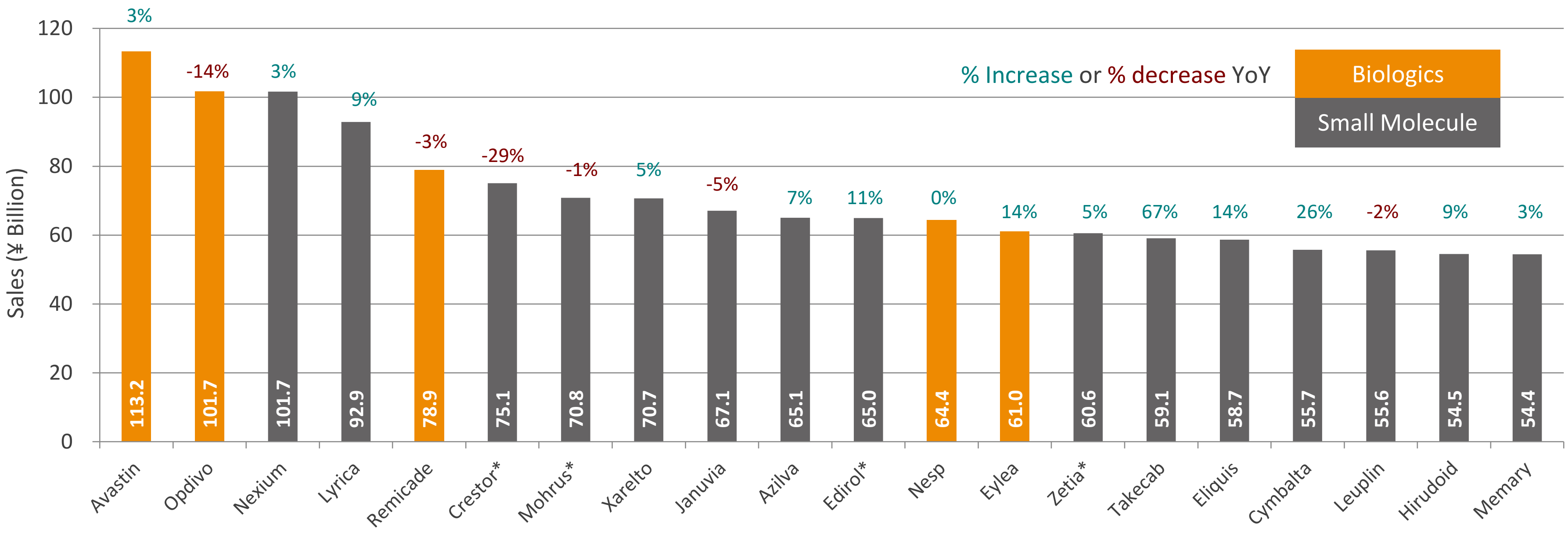
Data Period: 2017/4 -2018/3



- Top-10 Therapeutic Classes form ~45.6% of total Japan Pharma sales at ¥4,523.4 Billion (-0.2% YoY).
- **Antineoplastics (Oncology):** Growth maintained by contribution from new drugs including **Keytruda** (**Pembrolizumab** from MSD that started sales from February 2017 and contributed ¥45.2 Billion), **Tagrisso** (**Osimertinib** from AstraZeneca, ¥29.4 Billion), **Cyramza** (**Ramucirumab** from Eli Lilly, ¥46.3 Billion) etc. These fresh contributions offset the sales decline impact of **Opdivo** (¥101.7 Billion, -13.5% YoY), the leading product of the therapeutic class.
- **Antivirals:** -23.4% decline YoY was recorded largely due to drop in sales of **Harvoni** (¥45.7 Billion, -72% YoY), **Sovaldi** (¥34.5 Billion, -51% YoY) and **Viekirax** (¥11.9 Billion, -62% YoY).
- **Immunosuppressants:** Posted 10% YoY growth backed by growing sales of **Humira** (¥57.3 Billion, 14% YoY), **Revlimid** (¥47.5 Billion, 26% YoY), **Simponi** (¥39.3 Billion, 28% YoY) etc.

Top-20 Brands by Sales

Data Period: 2017/4 -2018/3



Definitions : **Biologics:** MAb and other large molecules whose structures cannot be drawn | **Small Molecule:** molecular structure can be drawn on paper

* Combined sales from Co-Marketing companies

- Combined sales of top-20 pharmaceuticals brands for the FY 2017 totaled ¥1,426.1 Billion and constituted 14.4% of the total Japan Pharma sales for the period.
- The combined sales of top-20 pharmaceuticals brands for the FY 2017 dropped by 1.8 PP compared to FY 2016 - largely due to decline in sales of **Harvoni** (-72% YoY) and **Opdivo** (-13.5% YoY).
- **Major Growing Brands:** included **Takecab** (67% YoY), **Cymbalta** (26% YoY), **Eylea** & **Eliquis** (both at ~14% YoY), and **Edirol** (~11% YoY).
- **Major Declining Brands:** included **Crestor** (-29% YoY due to patent expiry and generics entry), **Opdivo** (-14% YoY; declining after special price cuts and launch of competitor drug **Keytruda** in February 2017), and **Januvia** (-5% YoY).
- **Brands Entering 'Top-20 Club' in FY 2017 (on YoY basis):** Included **Takecab** (¥59.1 Billion), **Eliquis** (¥58.7 Billion), **Cymbalta** (¥55.7 Billion), **Hirudoid** (¥54.5 Billion) and **Memary** (¥54.4 Billion).
- **Brands Exiting 'Top-20 Club' in FY 2017 (on YoY basis):** Included **Harvoni** (¥45.7 Billion) **Sovaldi** (¥34.5 Billion), **Micardis** (¥32.9 Billion), **Olmetec** (¥53.6 Billion), and **Celecox** (¥54.1 Billion).

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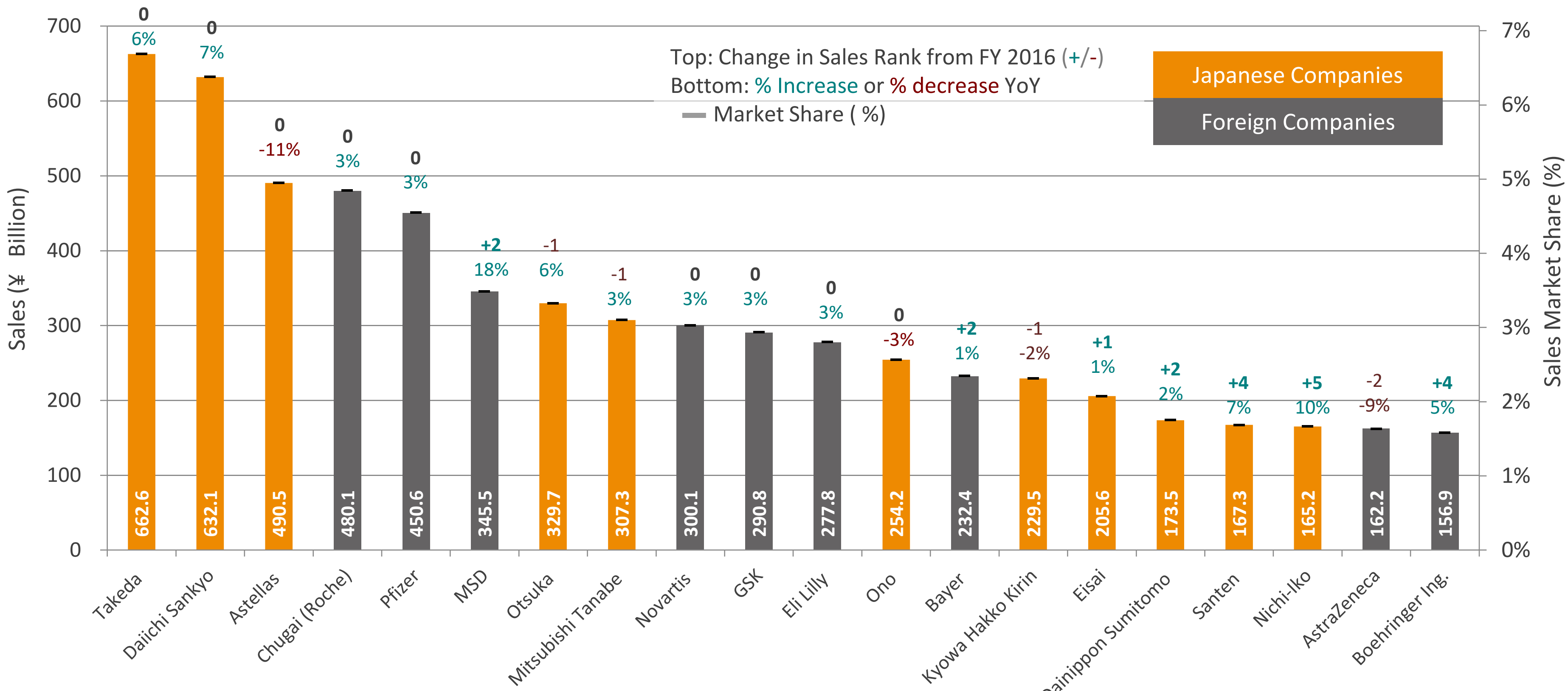
Top-20 Companies by Sales*

Data Period: 2017/4 -2018/3



* Sales by Marketing Authorization Holder

- Combined sales of top-20 'marketing-companies' constitutes 63.7% (-0.05 PP YoY) of total Japan pharma sales at ¥6,313.9 Billion (1.07% YoY) for the FY 2017.
- Among top-20 companies - sales ratio of Japanese Companies to Foreign Companies was ~57:43 (its was ~55:45 for FY 2016). Total sales of Japanese Companies among top-20 companies was ¥3,617.5 Billion (6.2 % YoY), while for the Foreign Companies it was ¥2,696.4 Billion (-5.05 % YoY) for the period.
- Among top-20 companies –**Santen** (¥167.3 Billion, 7% YoY), **Nichi-Iko** (¥165.2 Billion, 10% YoY) and **Boehringer Ingelheim** (¥156.9 Billion, 5% YoY) were the new entries, while **Gilead** (¥80.9 Billion, -65% YoY), **Shionogi** (¥136.8 Billion, -16% YoY) and **Janssen** (¥152.2 Billion, -6% YoY) lost their positions from the top-20 list compared to previous year.

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