



Encise 1H FY 2018 Snapshot

(NHI Price Based)

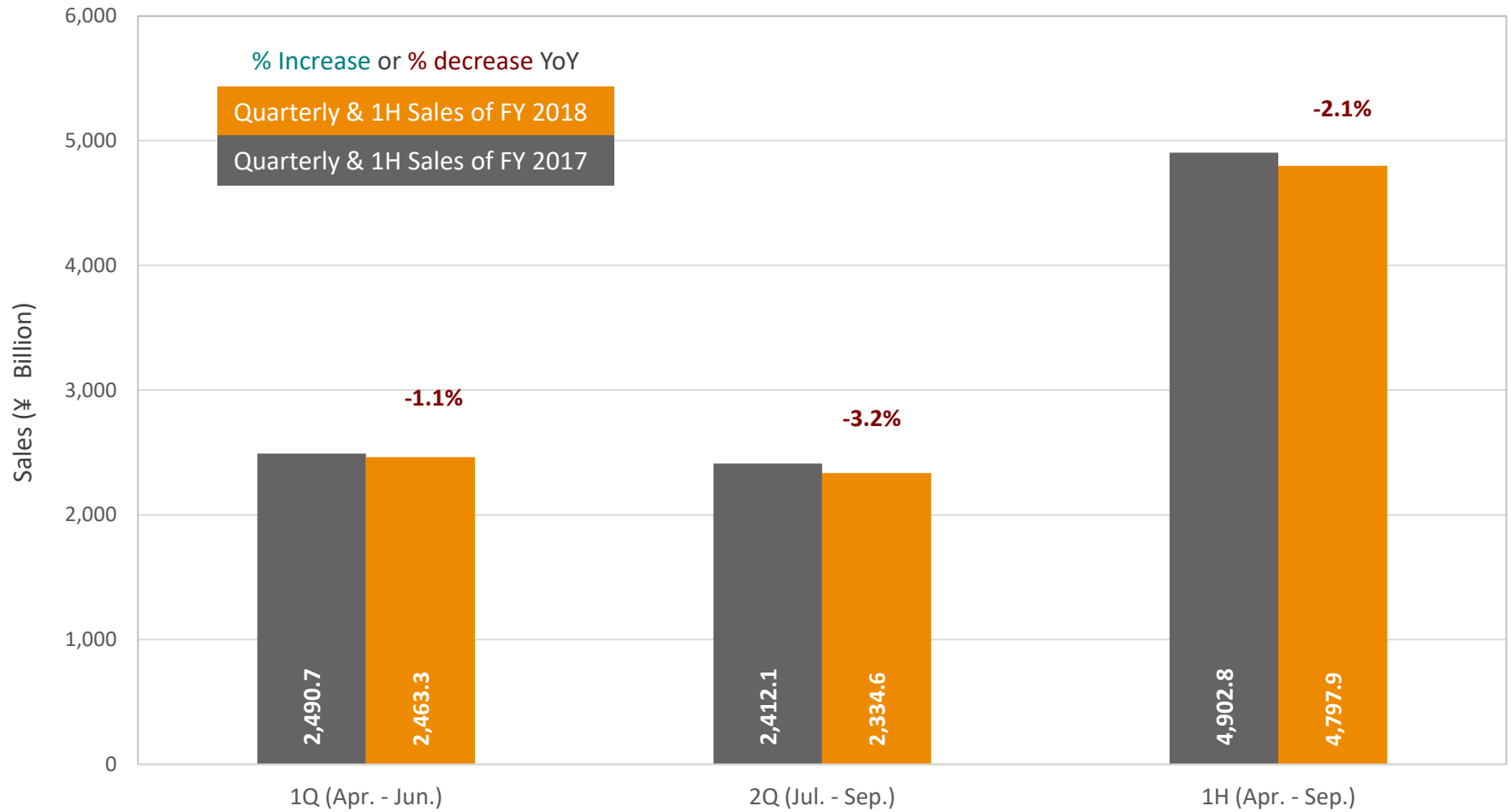
(04/2018 to 09/2018)

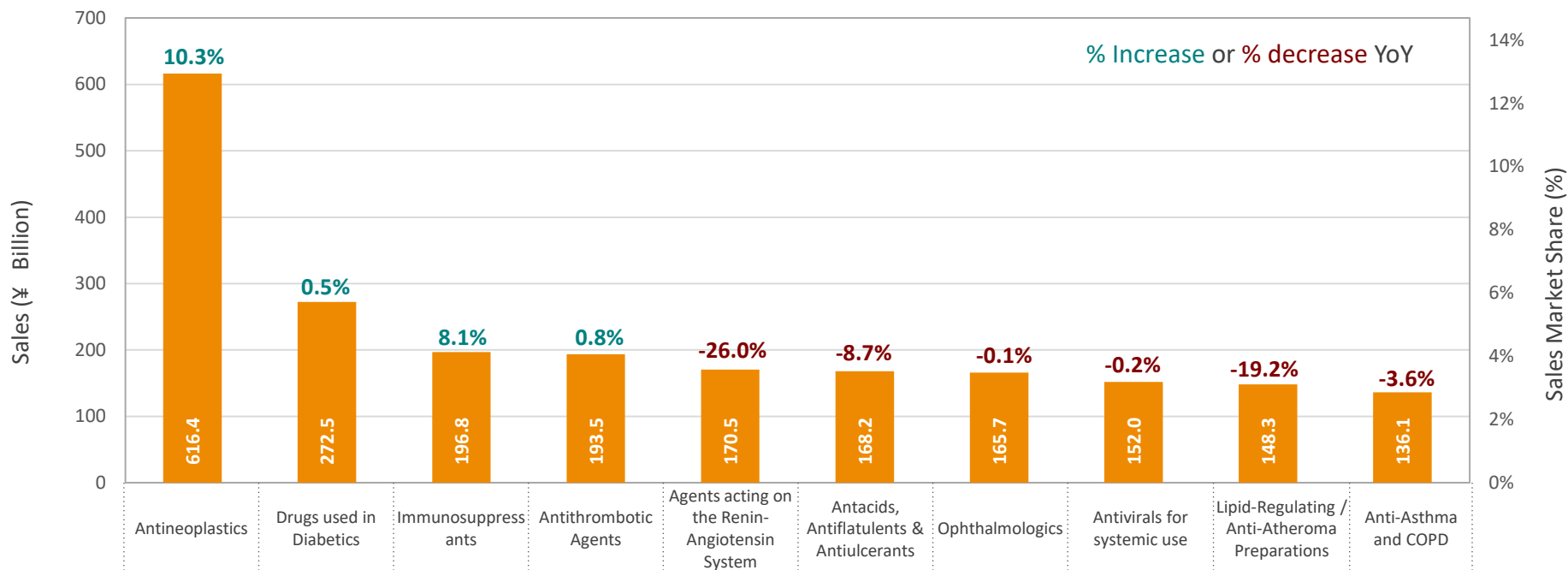
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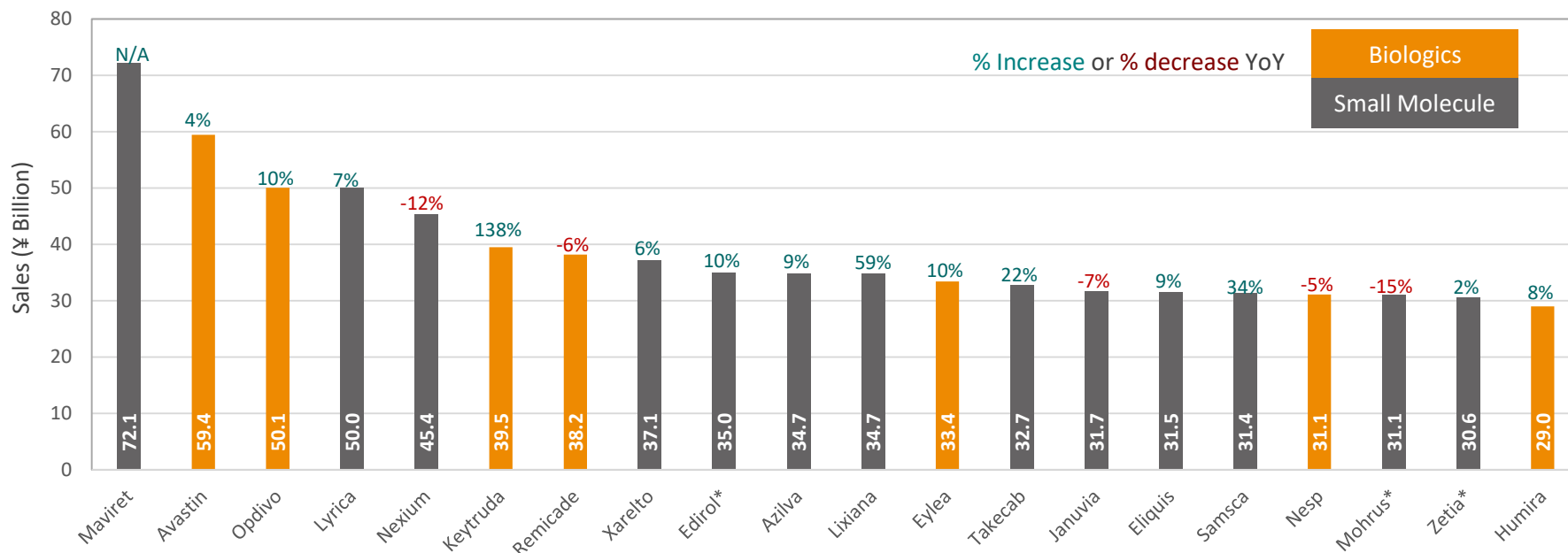
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Period at Glance (% Growth YoY)





- Top-10 Therapeutic Classes form ~46.3% of total Japan Pharma sales at ¥2,220.2 Billion (-1.8% YoY) for the 1H FY 2018.
- Antineoplastics (Oncology):** Double digit growth maintained by growing sales of **Keytruda** (¥39.5 Billion, 138% YoY), and **Opdivo** (¥50.1 Billion, 10% YoY), as well as from contribution from fresh launches – **Ibrance** (palbociclib, Pfizer, ¥11.5 Billion), **Darzalex** (daratumumab, Janssen, ¥7.5 Billion), and **Tecentriq** (atezolizumab, Chugai, ¥5.1 Billion) etc. They offset the declining sales impact of some major products from the therapy-class viz. **Herceptin** (trastuzumab, Chugai, ¥17.0 Billion, -19% YoY), **TS1** (tegafur, Taiho, ¥4.5 Billion, -60% YoY), **Rituxan** (rituximab, Chugai, ¥14.7 Billion, -38% YoY) etc.
- Agents acting on the Renin-Angiotensin System:** The class plunged drastically -26% YoY for the period following the April price cuts and GE and AG sales ramp-up - **Olmetec** (Daiichi Sankyo) alone lost ~ ¥27 Billion to ¥9.9 Billion (-74% YoY), while telmisartan and its combination brands (**Micardis**, **Micamlo** and **Micombi**) together lost ¥23 Billion (-61% YoY) .
- Lipid-Regulating / Anti-Atheroma Preparations:** The -19% YoY drop was largely due to fall in sales of **Crestor** (¥14.4 Billion, -72.5% YoY) due to GE entry and pricing impact.



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 1H 2018 totaled ¥778.9 Billion and constituted 16.2% of the total Japan Pharma sales for the period.
- The combined sales of top-20 pharmaceuticals brands for the 1H 2018 increased by 1.2 PP vs. 1H 2017 - largely due to fresh addition in sales from **Maviret** (¥72.1 Billion). It has taken the market by storm since its launch in Nov 2017, thanks to its pan-genotype use and short duration of therapy.
- Major Growing Brands:** included Maviret (N/A), **Keytruda** (138% YoY), **Lixiana** (59% YoY), and **Samsca** (34% YoY).
- Major Declining Brands:** included **Mohrus** (-15% YoY due to patent expiry and generics entry), **Nexium** (-12% YoY), and **Januvia** (-7% YoY).
- Brands Entering 'Top-20 Club' in 1H FY 2018 (on YoY basis):** Included Maviret, Keytruda, Lixiana, Takecab, Samsca, and Humira.
- Brands Exiting 'Top-20 Club' in 1H FY 2018 (on YoY basis):** Included **Crestor** (¥ 14.4 Billion, -72% YoY), **Olmetec** (¥ 9.9 Billion, -74%), **Harvoni** (¥ 11.5 Billion, -61% YoY), **Leuplin** (¥ 26.2 Billion, -7%), **Celecox** (¥ 28.2 Billion, 2% YoY), and **Memary** (¥ 28.8 Billion, 5% YoY)