

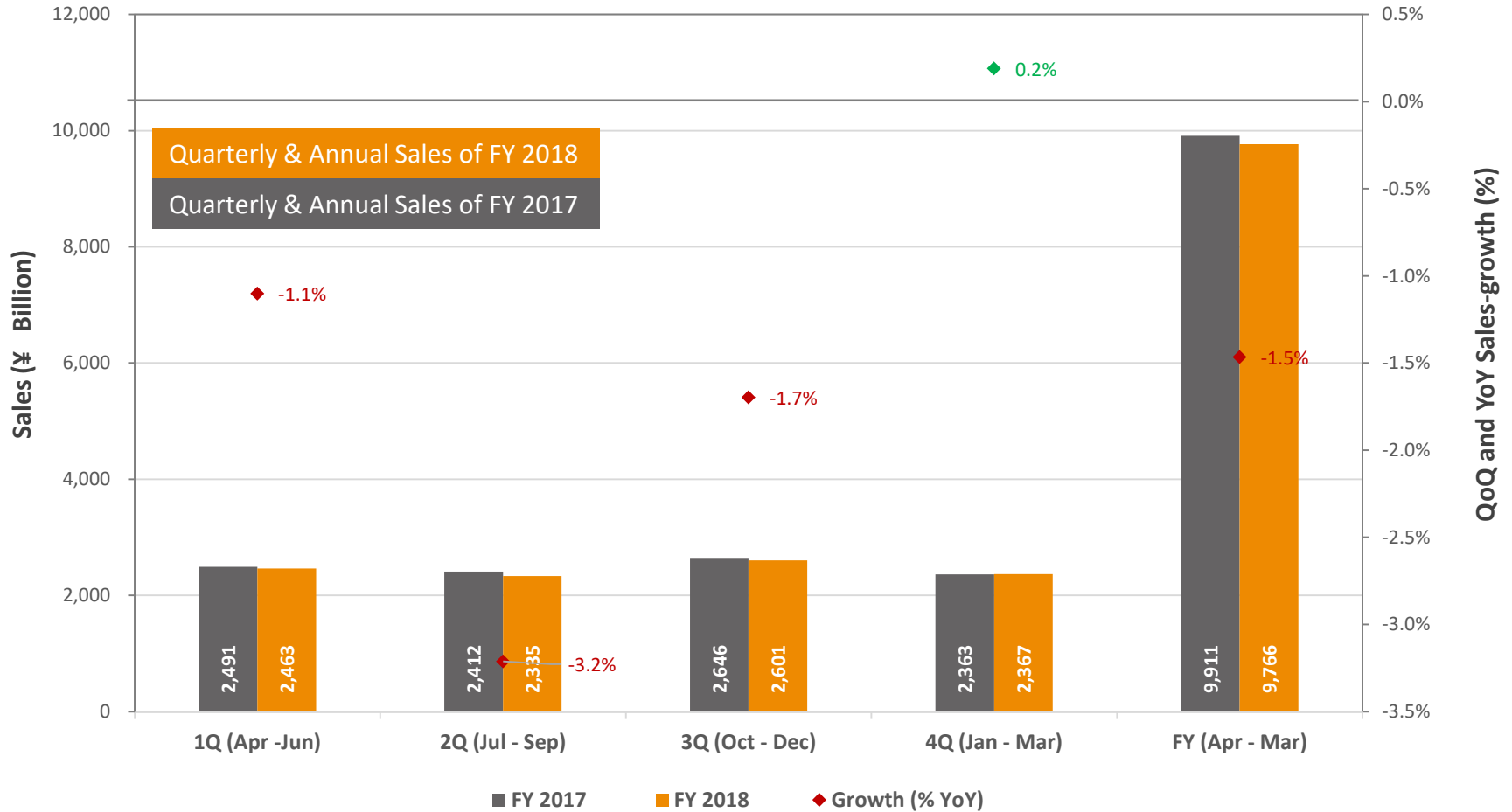


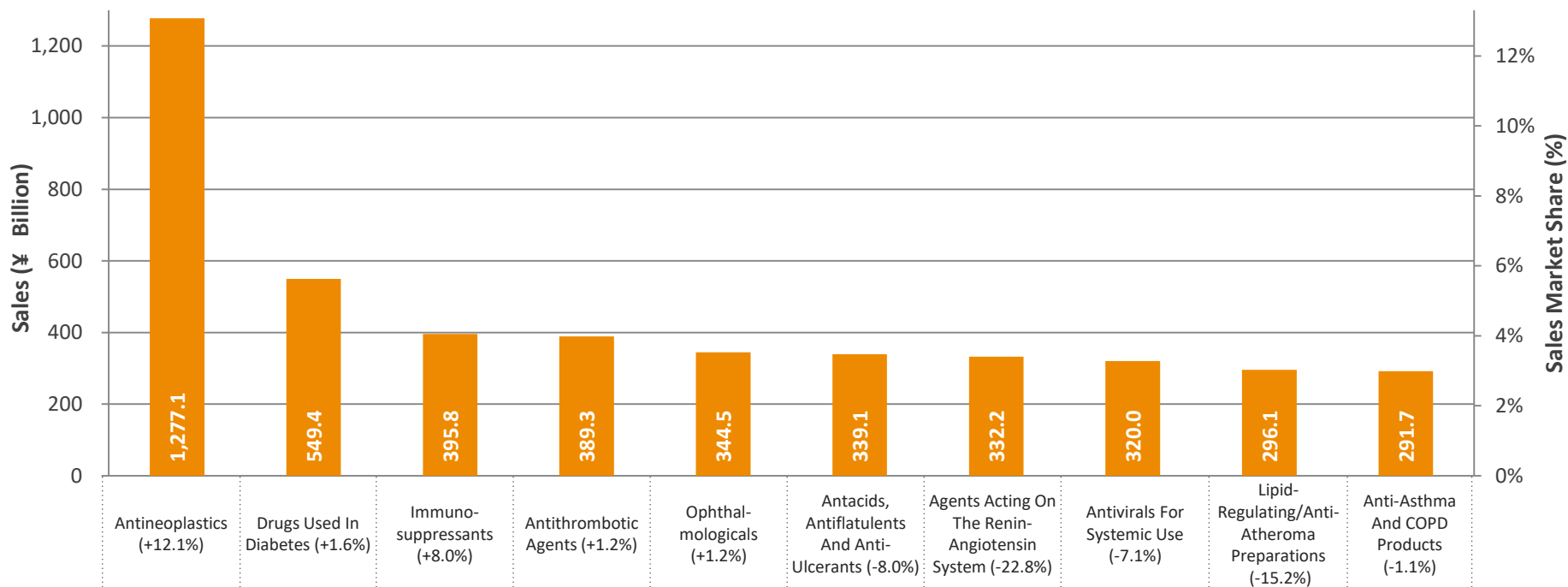
Encise FY 2018 Snapshot

(NHI Price Based)

(04/2018 to 03/2019)

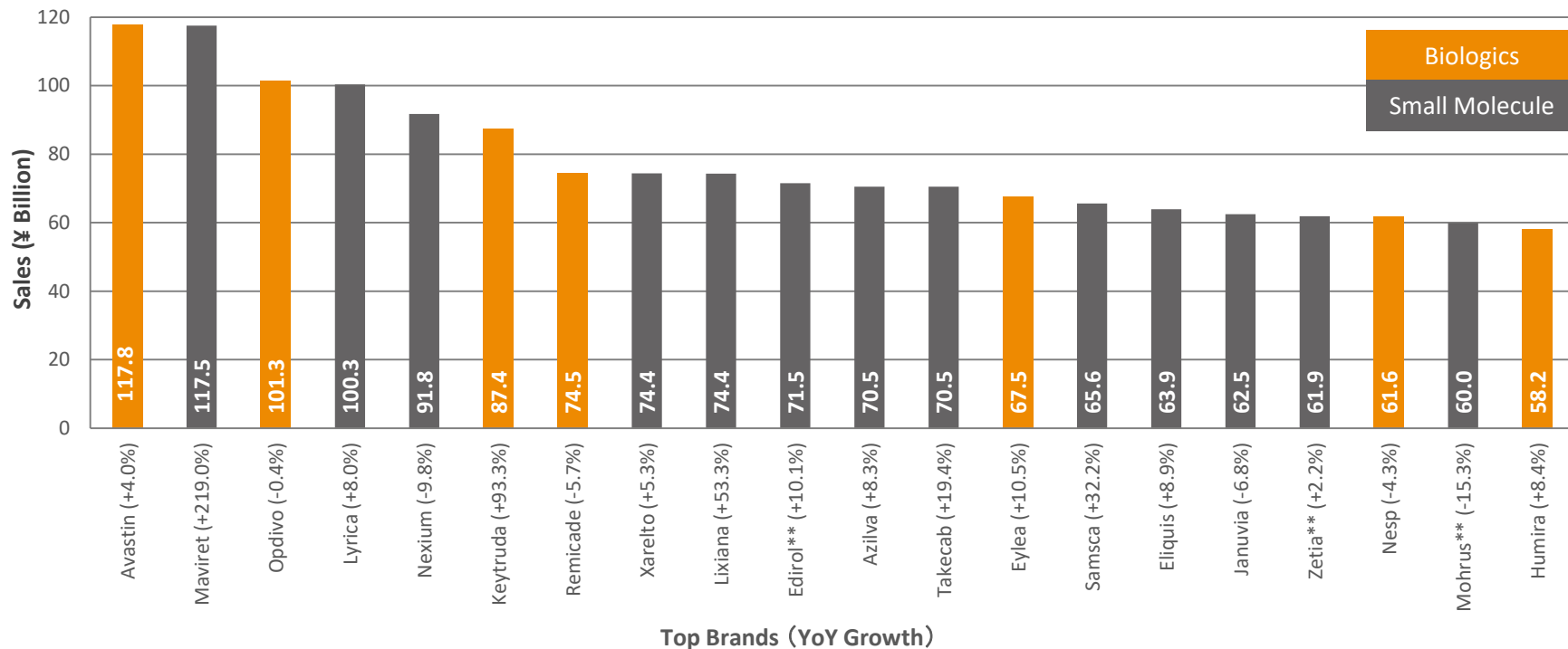
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Top Therapeutic Classes (YoY Growth)

- Top-10 Therapeutic Classes form ~46.4% of total Japan Pharma sales at ¥4,535.3 Billion (-0.5% YoY).
- Antineoplastics and Immunosuppressants** together form ~17% of total NHI-market and continue to grow in double digits (~11% YoY). They remain growth catalysts for the industry for the coming years with global pipeline full of potential candidates.
- In **Antineoplastics**, 12.1% growth was mainly backed by sales growth of **Keytruda** (¥87.4 Billion, +93% YoY), **Ibrance** (¥25.6 Billion, +569% YoY, launch in Dec-2017), **Tagrisso** (¥49.5 Billion, +68% YoY) and fresh sales from **Tecentriq** (¥14.4 Billion, launched in Apr-2018). For **Immunosuppressants**, growth was mainly contributed by **Stelara** (¥21.5 Billion, +58% YoY), **Simponi** (¥46.6 Billion, +19% YoY) and **Humira** (¥58.2 Billion, +8% YoY).
- On other hand, **Antacids, Antiflatulents & Anti-Ulcerants, Agents acting on the Renin-Angiotensin System and Lipid-Regulating/Anti-Atheroma Preparations** continue to shrink (-16% YoY).
- Renin-Angiotensin System** continue to decline as except Azilva (Azilsartan, Takeda, ¥70.5 Billion, +8% YoY), all other ARB Brands have lost patent and continues price-cuts and genericization led to crash in the class. ARB LLP's together lost ~¥114.6 Billion sales in FY 2018 leading to a -49.3% YoY decline. Likewise for **Lipid-Regulating Class** decline as all 'Statins' have gone generics and Statins LLP's together lost ¥72.2 Billion, -42% YoY.

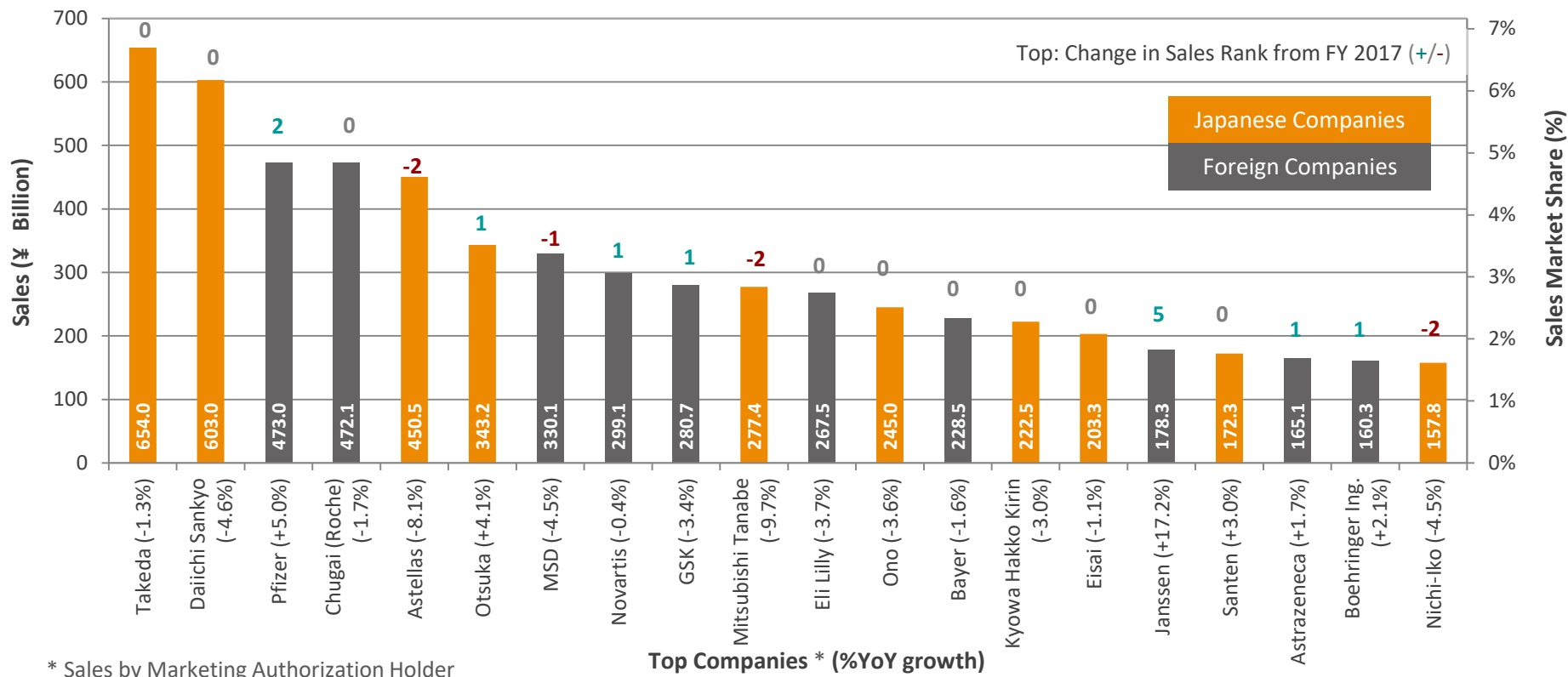


Top Brands (YoY Growth)

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

** Total Sales of the Brand marketed by more than one company (including topical agents).

- Combined sales of top-20 pharmaceuticals brands for the FY 2018 totaled ¥1,553.1 Billion and constituted 15.9% of the total Japan Pharma sales for the period.
- The combined sales of top-20 pharmaceuticals brands for the FY 2018 raised by 1.5 PP compared to FY 2017 - largely due to growing sales of **Maviret** (219.0% YoY) and **Keytruda** (93.3% YoY).
- **Brands Entering 'Top-20 Club' in FY 2018 (on YoY basis):** Five new Brands made entry into the top-20 club this year are - **Maviret** (Rank 2, 219.0% YoY, launched in Nov 2017), **Keytruda** (+93.3% YoY), **Lixiana** (+53.3% YoY), **Samsca** (+32.2% YoY) and **Humira** (+8.4% YoY).
- **Brands Exiting 'Top-20 Club' in FY 2018 (on YoY basis):** Included **Crestor** (-64.1% YoY), **Cymbalta** (~flat sales), **Leuplin** (-6.1% YoY), **Hirudoid** (-6.5% YoY) and **Memary** (+5.5% YoY).



* Sales by Marketing Authorization Holder

Top Companies * (%YoY growth)

- Combined sales of top-20 'marketing-companies' constitutes 63.3% (-0.4 PP YoY) of total Japan pharma sales at ¥6,183.9 Billion (-2.1% YoY) for the FY 2018.
- Among top-20 companies - sales ratio of Japanese Companies to Foreign Companies was ~54:46 (its was ~57:43 for FY 2017). Total sales of Japanese Companies among top-20 companies was ¥3,329.1 Billion (-8.0 % YoY), while for the Foreign Companies it was ¥2,854.8 Billion (5.9 % YoY) for the period.
- Among top-20 companies – While **Takeda** and **Daiichi-Sankyo** retained top two positions, total 7 companies in top-20 moved-up in their ranks (mostly foreign companies, except **Otsuka**). Among them include **Janssen** (moves 5 ranks up,+17.2% YoY, largely on the back of contribution from **Darzalex** and **Zytiga**) and **Pfizer** {moves 2 ranks up, +5.0% YoY, supported by fresh addition in sales of **Xeljanz** (transferred from Takeda) and growing sales of **Ibrance** and **Lyricea**}. On YoY growth basis however, 14 of top-20 posted a negative YoY growth.