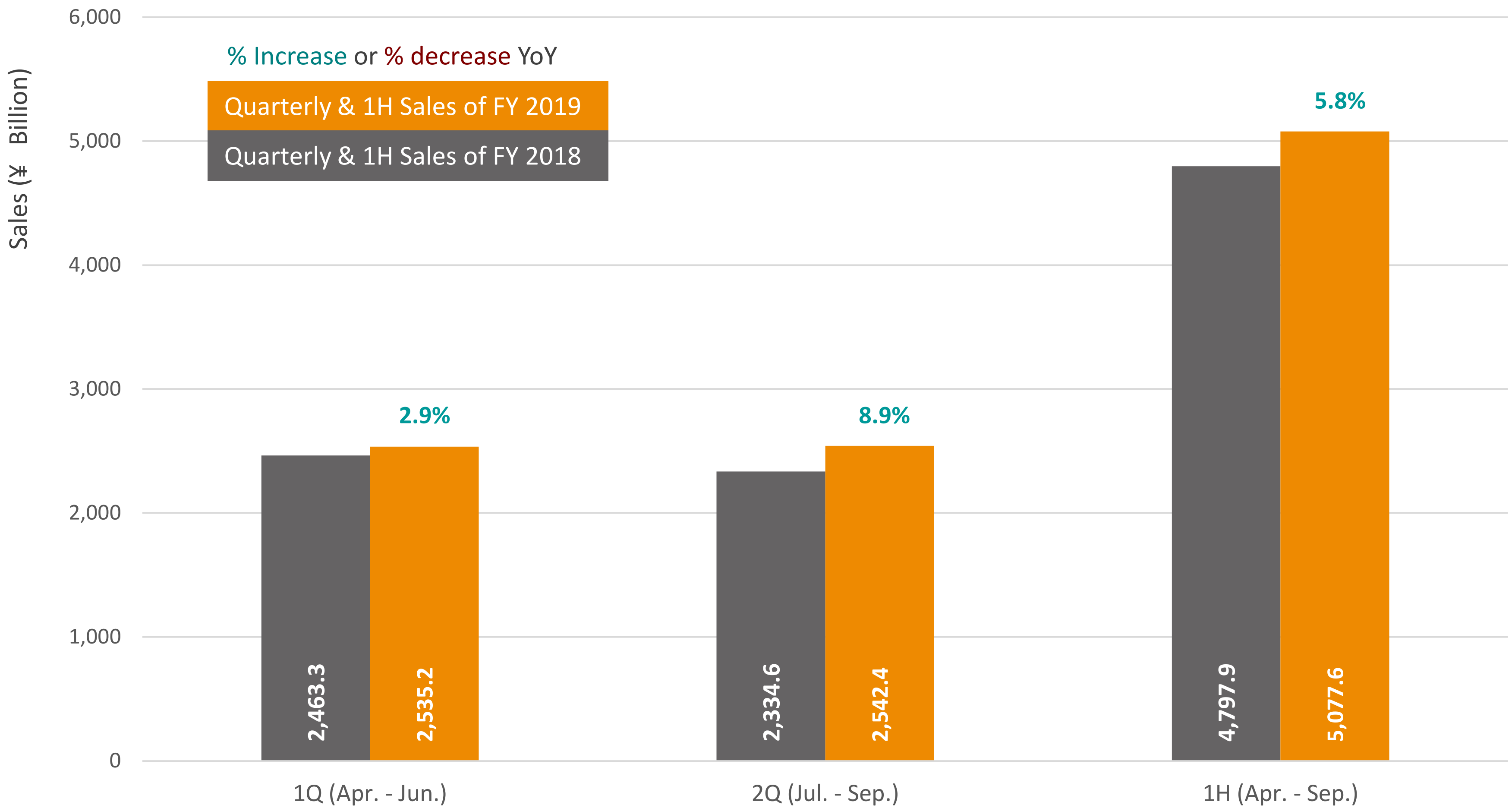
Encise 1H FY 2019 Snapshot

（NHI Price Based）

（04/2019 to 09/2019）

Period at Glance (% Growth YoY)

Data Period: 2019/4 -2019/9



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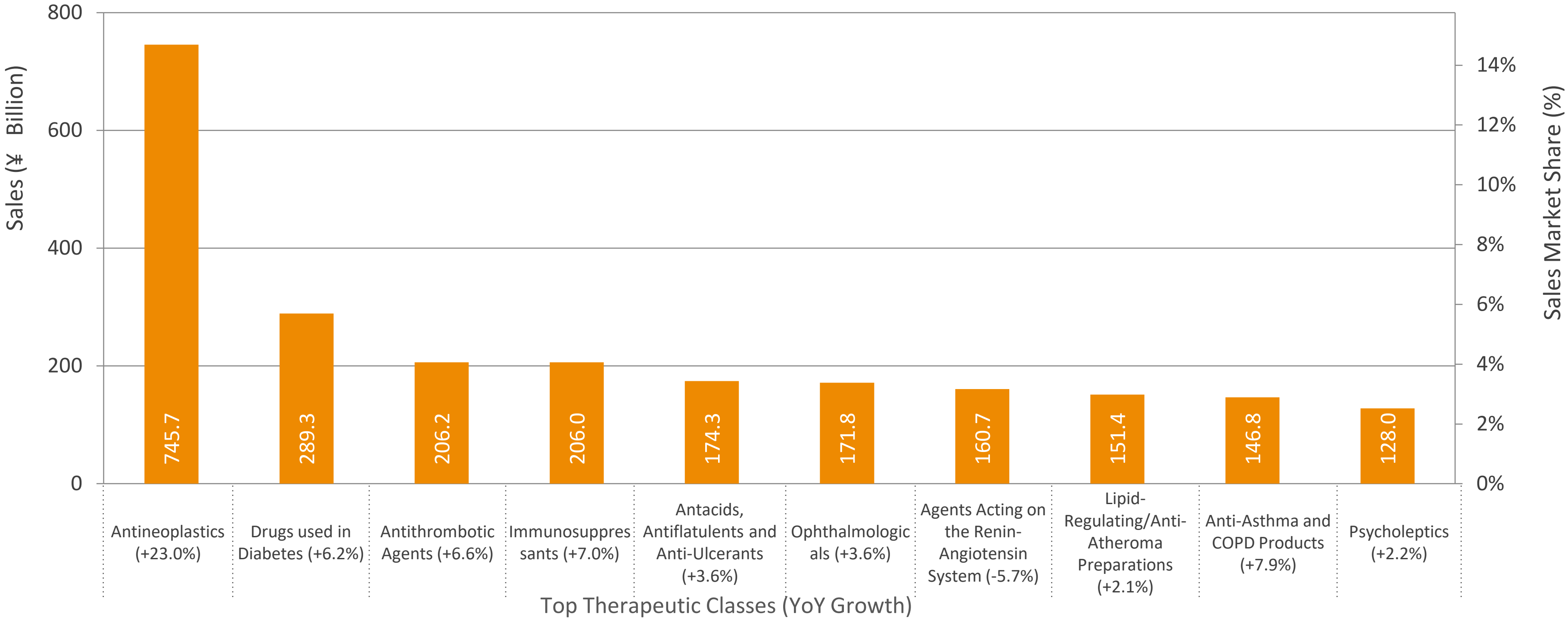
Top-10 Therapeutic Classes by Sales Data Period: 2019/4 -2019/9



- Top-10 therapeutic classes form about 46.9% of the total Japan pharma sales at ¥2,380.2 Billion (7.8% YoY) for the 1H FY 2019.
- **Antineoplastics (Oncology):** A remarkable 23% YoY growth was marked mainly due to growing sales of Immune Checkpoint Inhibitors (ICIs) - **Keytruda** (¥68.9 Billion, 74% YoY), **Imfinzi** (¥14.1 Billion, launched in Aug 2018), and **Tecentriq** (¥11.8 Billion, 131% YoY), while the first ICI **Opdivo**'s sales was ¥51.6 Billion (3% YoY) for the 1H of 2019.
- Among others, **Tagrisso** (¥43.2 Billion, 145% YoY), **Perjeta** (¥19.1 Billion, 106% YoY), **Lynparza** (¥8.5 Billion, 231% YoY), **Verzenio** (¥5.1 Billion, launched in Nov 2018) contributed to the sales, while **Rituxan** posted -43.5% YoY degrowth to ¥8.3 Billion following the launch of its biosimilar version in Jan-2018
- **Agents acting on the Renin-Angiotensin System:** The sales of the class continue to fall and witnessed a -5.7% YoY decline, largely due to the GE and AG sales ramp-up. The brands faced maximum sales drop for the period were - **Aimix** (¥3.7 Billion, -61% YoY), **Olmetec** (¥7.4 Billion, -25% YoY), **Micardis** (¥6.2 Billion, -23.4% YoY), etc.
- **Anti-Asthma and COPD Products:** They posted 7.9% YoY growth due to growing sales of **Symbicort** (¥23.7 Billion, 8% YoY; growth was marked after transfer of sales & distribution rights from Astellas to AstraZeneca after July 2019), **Fasenra** (¥5.8 Billion, 106% YoY), **Nucala** (¥6.4 Billion, 70% YoY), etc.

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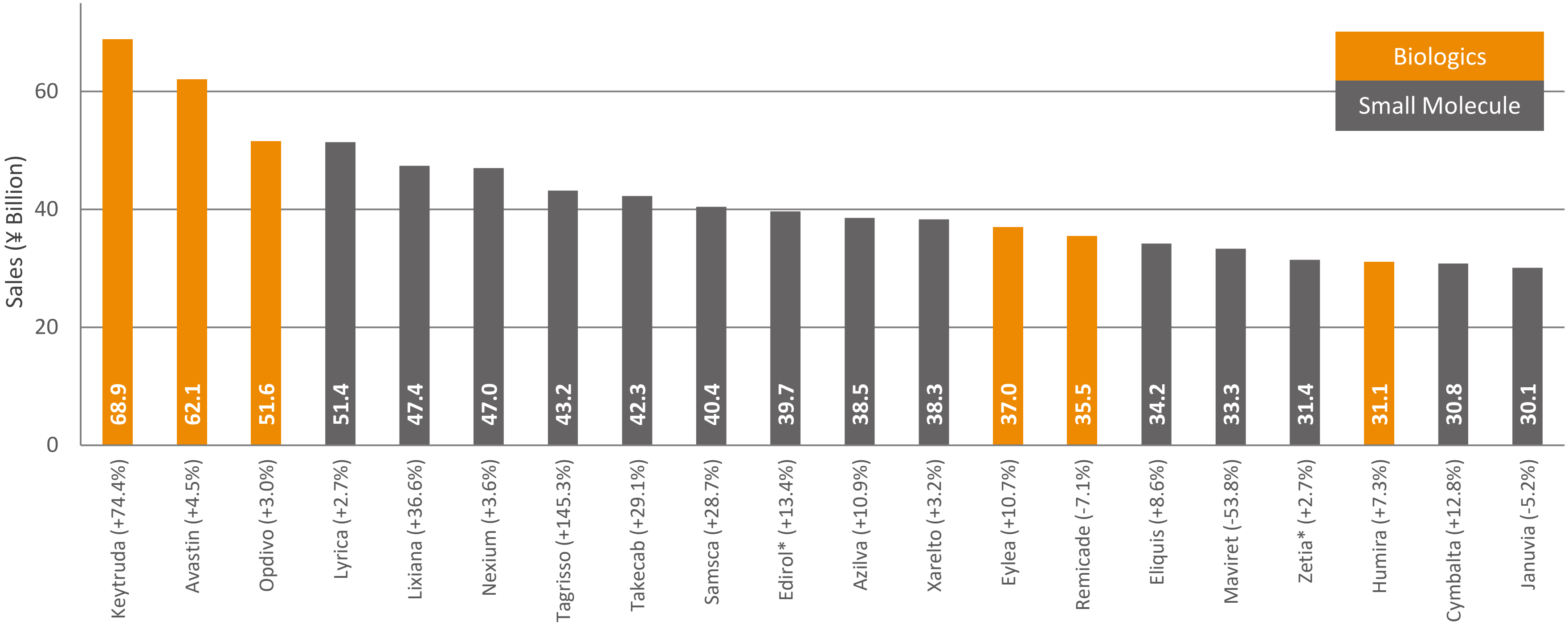
Top-20 Brands by Sales

Data Period: 2019/4 -2019/9



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

- Combined sales of top-20 pharmaceutical brands for the 1H FY 2019 totaled ¥834.3 Billion and constituted 16.4% of the total Japan pharma sales for the period.
- The combined sales of top-20 pharmaceutical brands for the 1H FY 2019 raised by 0.2 PP compared to 1H FY 2018 - largely due to growing sales of **Keytruda** (74.4% YoY) and **Tagrisso** (145.3% YoY).
- **Brands Entering 'Top-20 Club' in 1H FY 2019 (on YoY basis):** Two new Brands made entry into the top-20 club this period are - **Tagrisso** (at rank 7) and **Cymbalta** (at rank 19).
- **Brands Exiting 'Top-20 Club' in 1H FY 2019 (on YoY basis): Nesp** (¥24.8 Billion, -20.2% YoY) and **Mohrus** (¥28.5 Billion, -8.3% YoY) were included.

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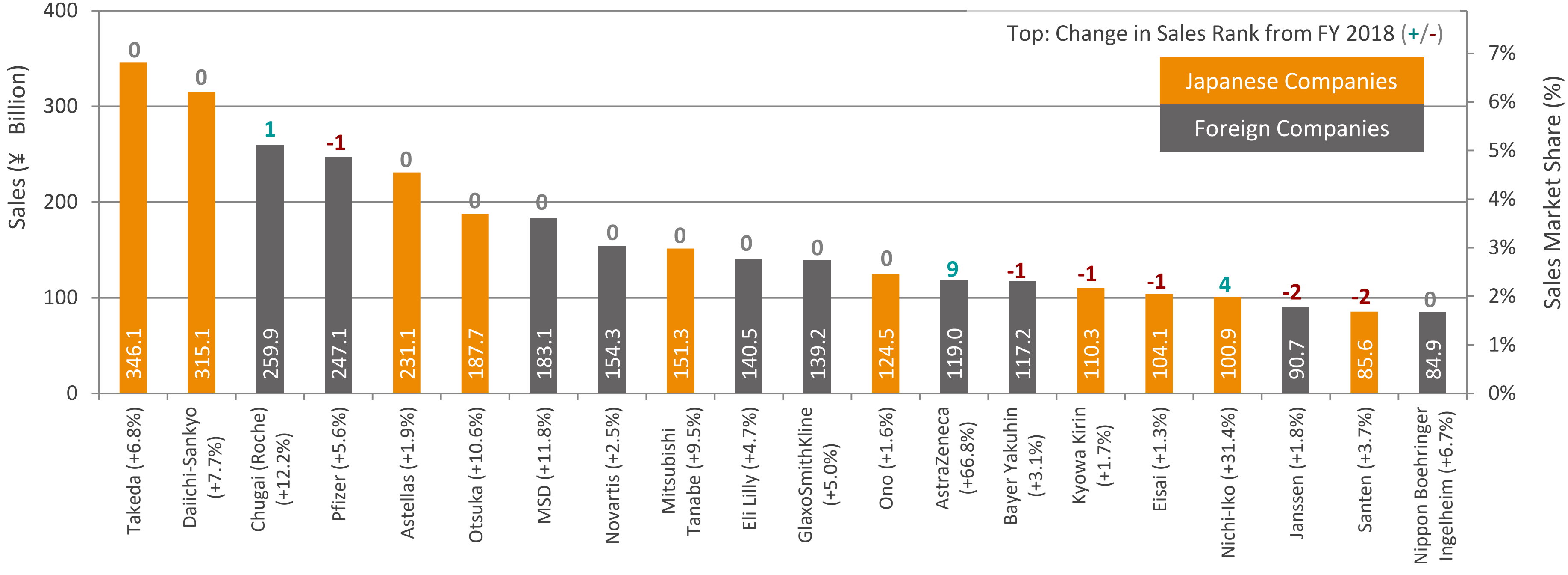
Top-20 Companies by Sales** Data Period: 2019/4 -2019/9



** Sales by Marketing Authorization Holder

- Combined sales of top-20 marketing-companies constitutes 64.8% (+1.1 PP YoY) of the total Japan pharma sales at ¥3,292.6 Billion (7.6% YoY) for the 1H FY 2019.
- Among top-20 companies - sales ratio of Japanese Companies to Foreign Companies was about 53:47 (it was about 54:46 for 1H FY 2018). Total sales of Japanese Companies among top-20 companies was ¥1,756.7 Billion (6.6 % YoY), while for the Foreign Companies it was ¥1,535.8 Billion (8.8 % YoY) for the period.
- Among top-20 companies – while **Takeda** and **Daiichi-Sankyo** retained top two positions, total three companies in top-20 moved-up in their ranks are - **AstraZeneca** (moved 9 ranks up, with +66.8% YoY, largely due to retaining sales rights of **Symbicort** from Astellas and contributions from **Fasenra**), **Nichi-Iko** (moved 4 ranks up largely after Elmed became its wholly owned subsidiary), and **Chugai (Roche)** moved one rank up at +12.2% YoY.
- Total six companies fall on their ranks compared to same period last year are – **Janssen** and **Santen** both by two ranks and **Pfizer, Bayer Yakuhin, Kyowa Kirin,** and **Eisai** by one rank each.
- Among top-20, **AstraZeneca** and **Nichi-Iko** were two new entries, while **AbbVie** (-44.3% YoY) and **Sumitomo Dainippon** (-3.3% YoY) lost their positions from top-20.