Encise
FY 2019 Snapshot

（NHI Price Based）

April 2019 to March 2020

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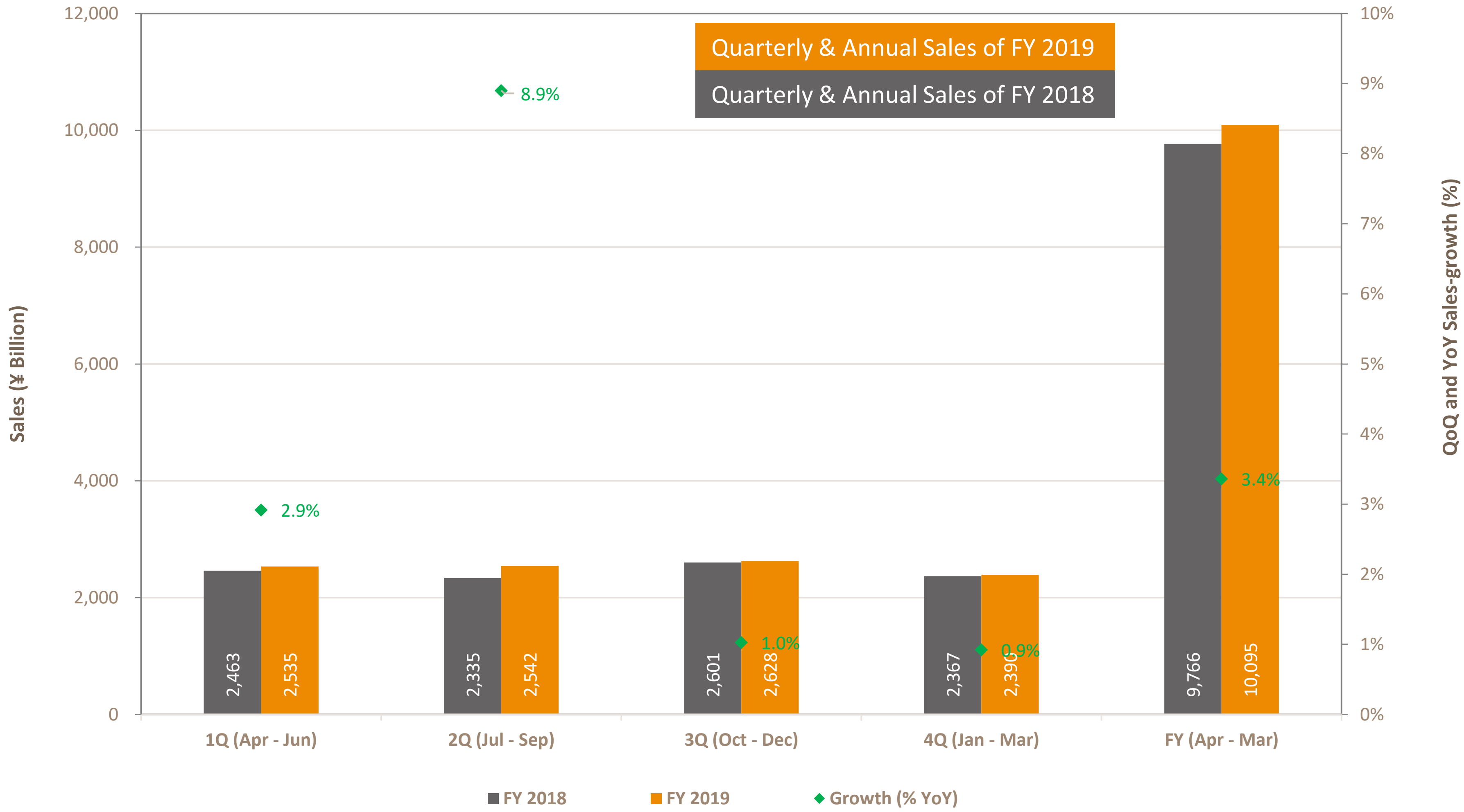
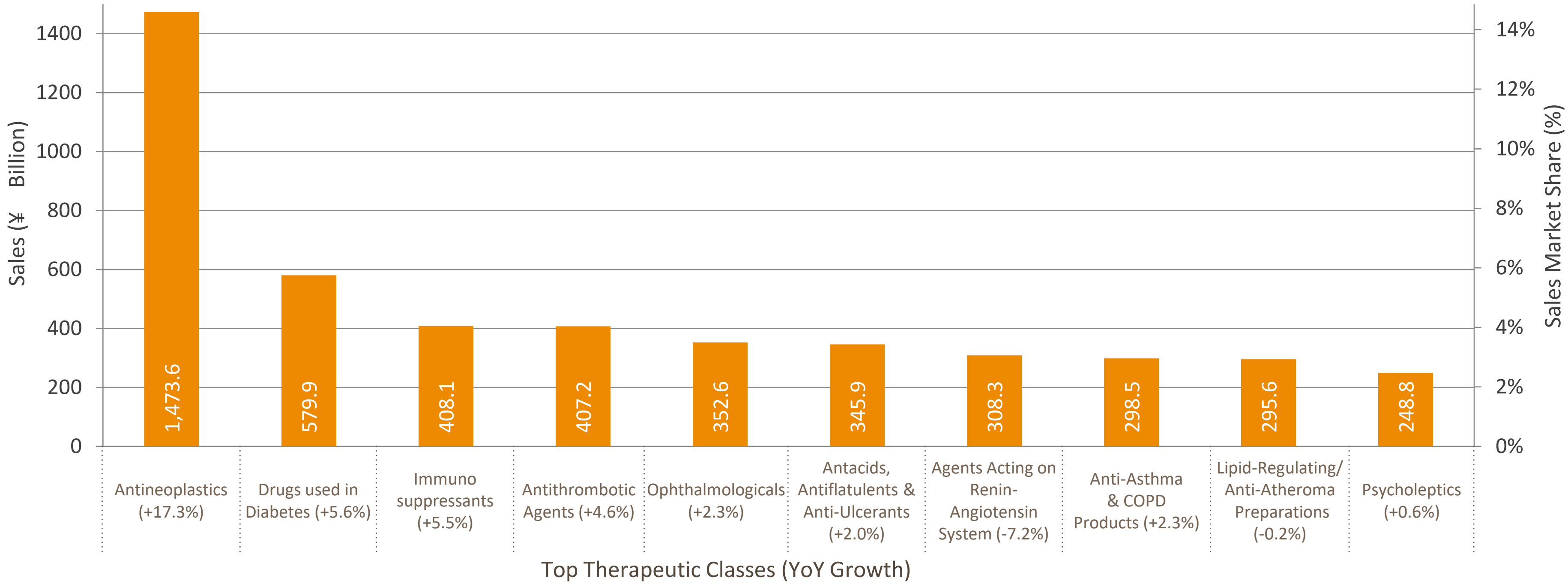
Period at Glance (QoQ and YoY) Data Period: FY2018/ FY2019

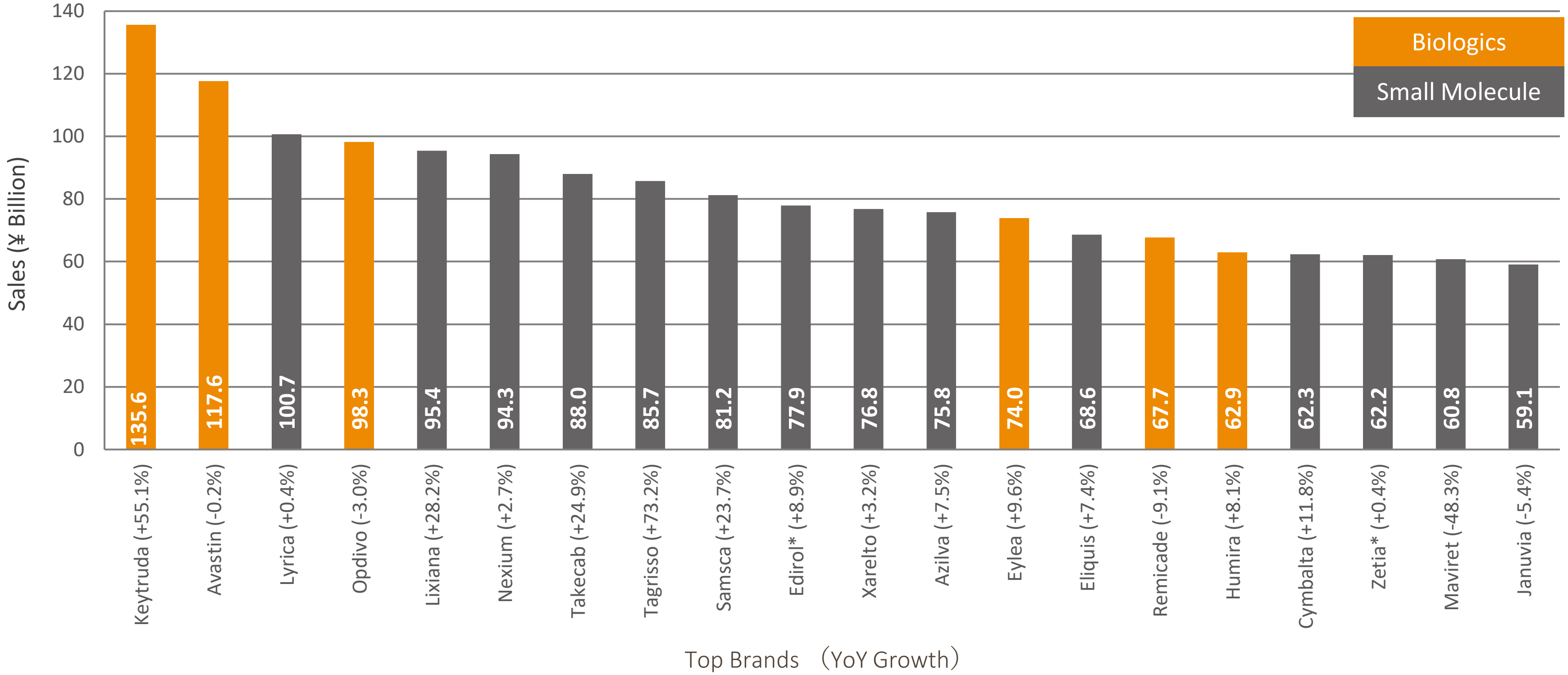


Top-10 Therapeutic Classes by Sales Data Period: 2019/4 -2020/3



- Top-10 Therapeutic Classes form 46.7% of total Japan Pharma sales at ¥4,718.5 Billion (4.7% YoY).
- Antineoplastics form 14.6% of total NHI-market and continue to grow in double digits (17.3% YoY). They remain growth catalysts for the industry for the coming years with global pipeline full of potential candidates.
- In Antineoplastics, 17.3% growth was mainly backed by contribution from Keytruda (¥135.6 Billion, +55.1% YoY), Tagrisso (¥85.7 Billion, +73.2% YoY), Imfinzi (¥29.7 Billion, +271.1% YoY), Perjeta (¥40.1 Billion, 82.5% YoY) etc.
- In Antineoplastic sub-categories, MAb and Protein Kinase inhibitors together form 73.4% share and growing at 21.8% YoY. While conventional Antineoplastics (Antimetabolites, Alkylating Agents, Antibiotics and Platinum Agents) are stagnant or degrowing. Immune Check-Point Inhibitors total sales was¥299.9 Billion, 39.2% YoY.
- Cardiovascular Drugs categories Agents Acting on the Renin-Angiotensin System and Lipid-Regulating/Anti-Atheroma Preparations remains among top-10 therapeutic class but they continue to shrink (-7.2% and -0.2% respectively). Except, Azilva (¥75.8 Billion, 7.5% YoY) and Zacras (23.6 Billion, 11.1% YoY), all other ARB Brands including combination drugs have lost patent and continues price-cuts and genericization led to crash in the class. Likewise, for Lipid-Regulating Class decline as all 'Statins' have gone generics and Statins LLP's sales is declining (¥61.4 Billion, -16.6% YoY).

Top-20 Brands by Sales　Data Period: 2019/4 -2020/3



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

- Combined sales of top-20 pharmaceuticals brands for the FY 2019 totaled ¥1,644.7 Billion and constituted 16.3% of the total Japan Pharma sales for the period.
- The combined sales of top-20 pharmaceuticals brands for the FY 2019 increased by 5.9% compared to FY 2018. It was largely due to increased sales of Keytruda (55.1% YoY), Tagrisso (73.2% YoY), and Lixiana (28.2% YoY), however the sales of Maviret (-48.3% YoY) and Remicade (-9.1%) etc., decreased.
- Biologics Brands constitute 33.8% of the Top-20 Brands sales. It is 2.8 percent point (PP) less than previous year mainly due to Nesp was not included this year in top-20 and the sales of Avastin, Opdivo and Remicade declined.
- Brands Entering and Exiting 'Top-20 Club' in FY 2019 (on YoY basis): Two New Brands made entry into the top-20 club this year are - Cymbalta (Rank 17, 11.8% YoY) and Tagrisso (Rank 8, 73.2% YoY) and the Two Brands exited are – Nesp (-53% YoY due to generics entry) and Mohrus (-8.1% YoY).

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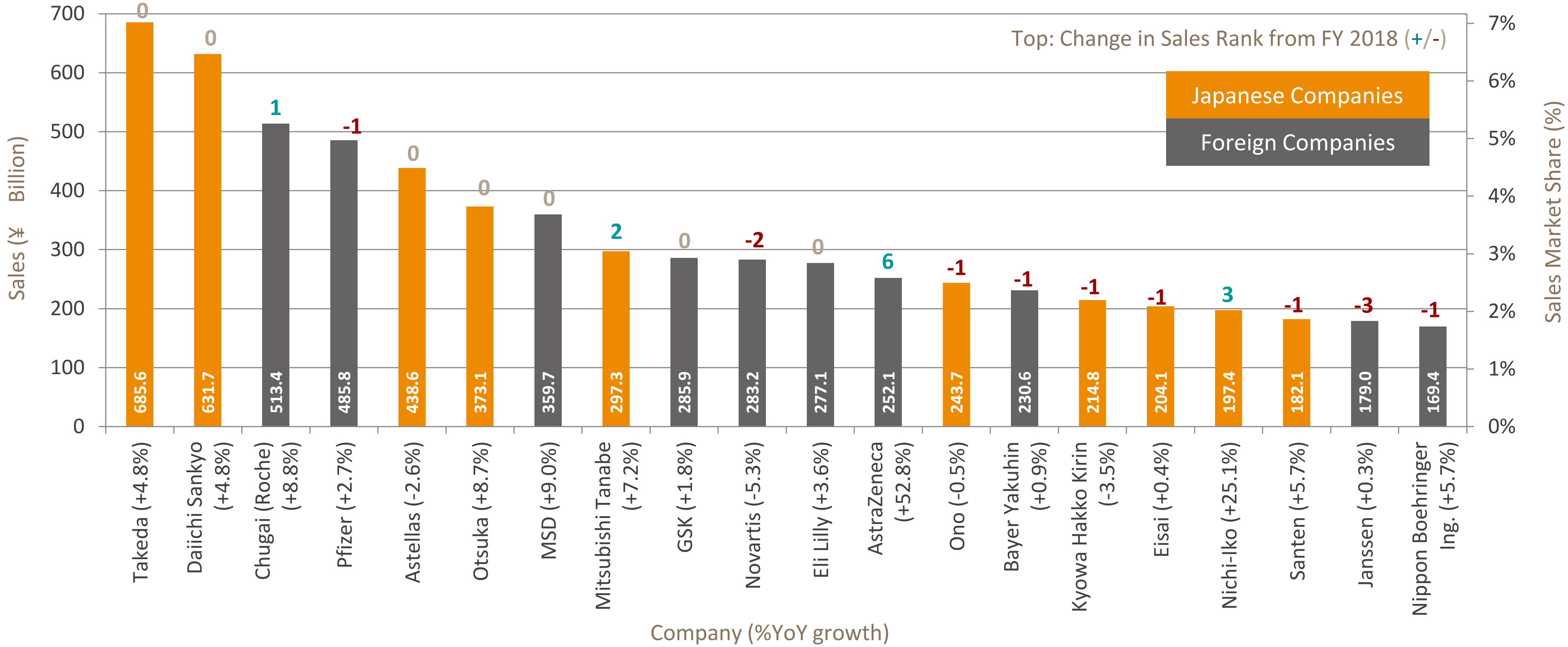
Top-20 Companies by Sales*   Data Period: 2019/4 -2020/3



* Sales by Marketing Authorization Holder

- Combined sales of top-20 ‘marketing-companies’ constitutes 64.4% (up by 1.1PP YoY) of total Japan pharma sales at ¥6,504.7 Billion (5.2% YoY) for the FY 2019.
- Among top-20 companies - sales ratio of Japanese Companies to Foreign Companies was ~53:47 (it was ~54:46 for FY 2018). Total sales of Japanese Companies among top-20 companies was ¥3,468.4 Billion (4.2% YoY), while for the Foreign Companies it was ¥3,036.2 Billion (6.4% YoY) for the period.
- Among top-20 companies – While Takeda and Daiichi-Sankyo retained top two positions, total 4 companies in top- 20 moved-up in their ranks. Among them include AstraZeneca which moves 6 ranks up,+52.8% YoY, largely due to growing sales of Tagrisso (¥85.7 Billion, 73.2% YoY), Imfinzi (¥29.7 Billion, 271.1% YoY) and transfer of sales of Symbicort (¥28.4 Billion)], Nichi-Iko (moves 3 ranks up), Mitsubishi-Tanabe (2 ranks up) and Pfizer (1 rank up).