



Encise 1H FY 2020 Snapshot

(NHI Price Based)

April 2020 to September 2020

Disclaimer: Encise has prepared these reports by processing, editing, and developing estimates based on the ethical drug information we have collected. We do not guarantee the accuracy or completeness of this information, or that it meets any specific threshold in terms of content and/or quality.

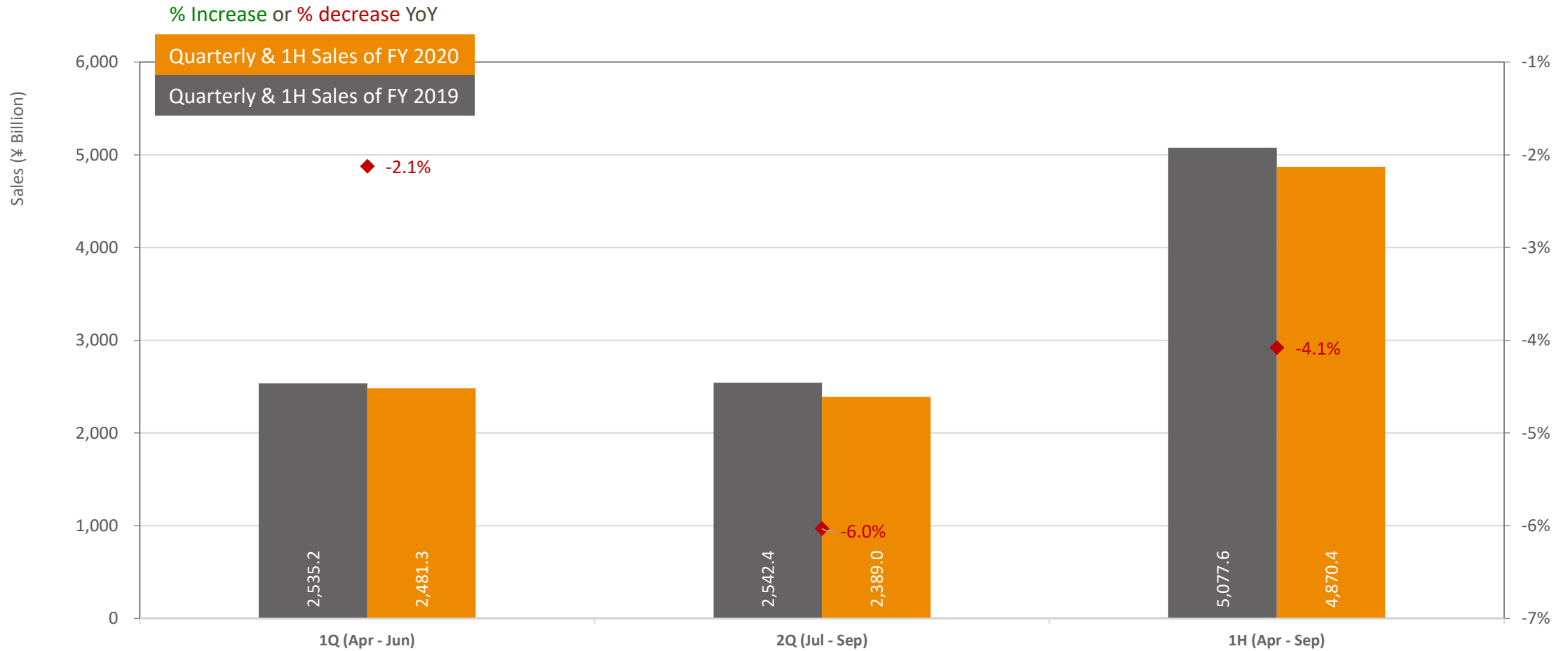


Copyright © 2020 Encise Inc. All Rights Reserved.

FOR THE NEXT GENERATION. FOR THE PATIENTS.

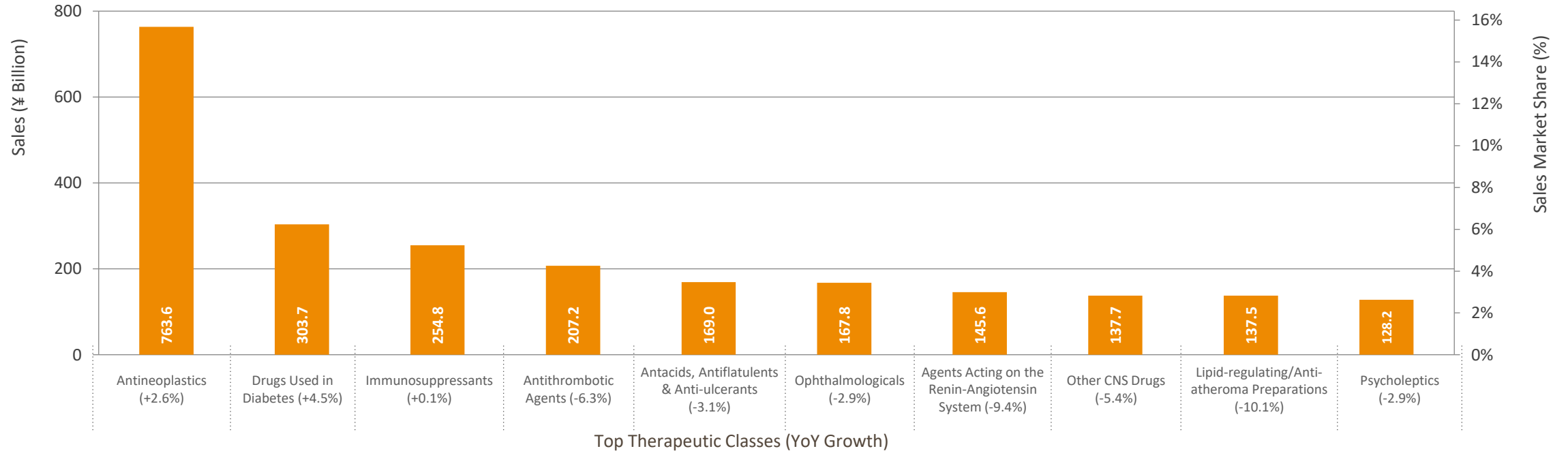
Period at Glance (% Growth YoY)

Data Period: 2020/4-2020/9



Top-10 Therapeutic Classes by Sales

Data Period: 2020/4 -2020/9

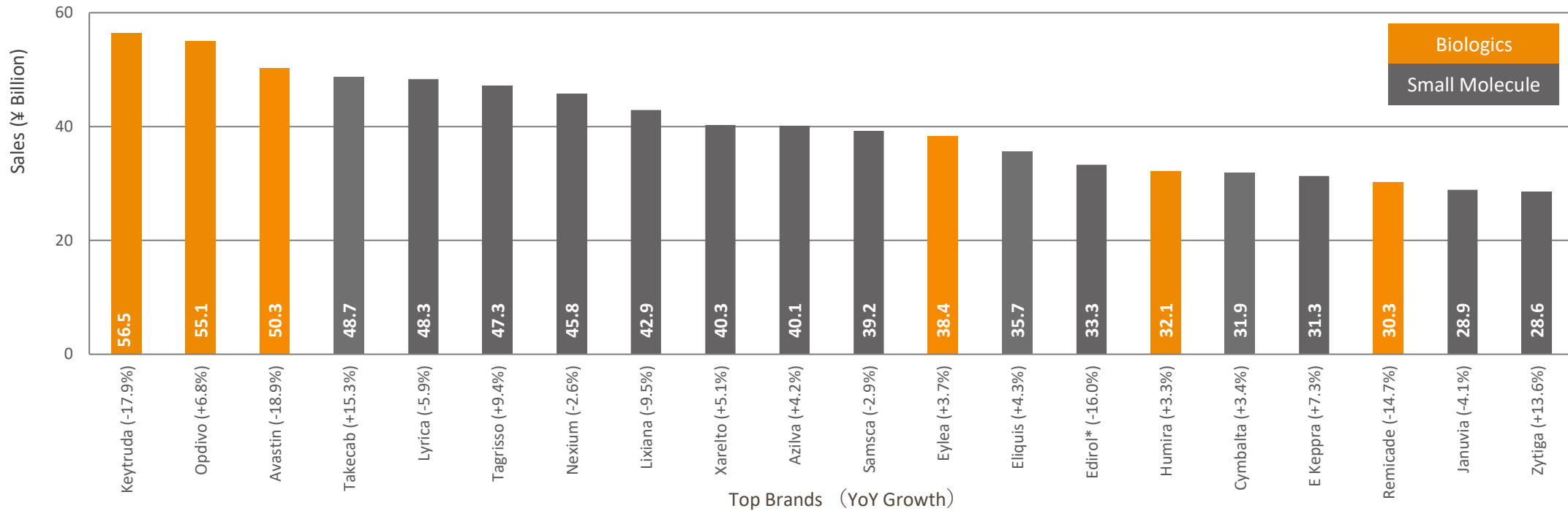


- Top-10 therapeutic classes form 49.6% of the total Japan pharma sales at ¥2,415.2 Billion (-2.0% YoY) for the 1H FY 2020. Due to COVID-19 pandemic impact, seven of the top 10 therapeutic categories posted negative YoY growth. However, Drugs used in Diabetes, Antineoplastics, and Immunosuppressants posted growth of 4.5%, 2.6%, and 0.1% respectively.
- Drugs Used in Diabetes:** **Victoza** (¥10.2 Billion, 43.2% YoY), **Trulance** (¥6.5 Billion, 88.7% YoY), **Jardiance** (¥13.7 Billion, 22.8% YoY) were top contributors to the 4.5% YoY growth of the class.
- Antineoplastics:** Among top brands from the class – **Keytruda** (¥56.5 Billion, -17.9% YoY) and **Avastin** (¥50.3 Billion, -18.9% YoY) posted degrowth, while **Opdivo** (¥55.1 Billion, 6.8% YoY), and **Tagrisso** (¥47.3 Billion, 9.4% YoY) continue to grow. The growth of the class was also contributed by **Tecentriq** (¥21.8 Billion, 84.2%YoY), **Ofev** (¥19.4 Billion, 32.5%YoY), and **Verzenio** (¥9.9 Billion, 91.9%YoY).
- Lipid-regulating/Anti-atheroma Preparations:** It posted maximum decline among top-10 therapeutic class (-10.1% YoY). The decline was mainly due to the declining sales of **Zetia*** (¥19.1 Billion, -39.1% YoY), **Crestor*** (¥9.9 Billion, -16.1% YoY), and **Epadel** (¥7.2 Billion, -16.4% YoY).

* Total Sales of the Brand marketed by more than one company.

Top-20 Brands by Sales

Data Period: 2020/4 -2020/9

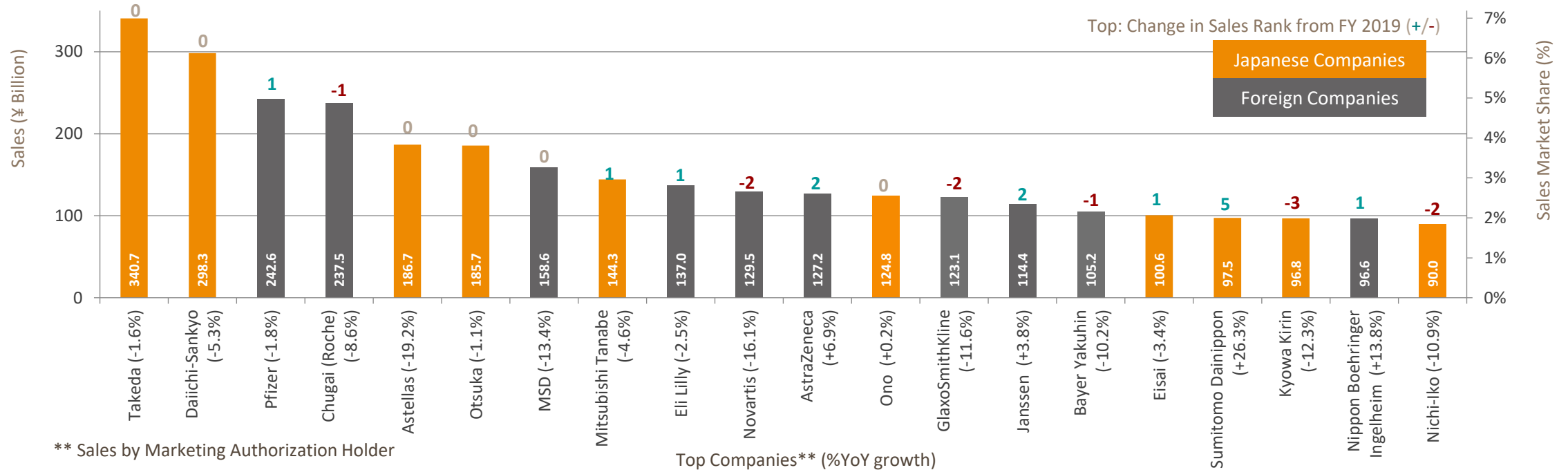


* Total Sales of the Brand marketed by more than one company.

- The combined sales of top-20 pharmaceutical brands for the 1H FY 2020 totaled ¥805.0 Billion and constituted 16.5% of the total Japan pharma sales for the period.
- **Brands Entering 'Top-20 Club' in 1H FY 2020:** Two new Brands made entry into the top-20 club this period are - **E Keppra** (at rank 17) and **Zytiga** (at rank 20).
- **Brands Exiting 'Top-20 Club' in 1H FY 2020:** **Maviret** (¥24.5 Billion, -26.5% YoY) and **Zetia*** (¥19.1 Billion, -39.1% YoY) were included. **Maviret** plunged as hepatitis C patients are declining in Japan, while **Zetia*** was hit by the launch of Generics in June 2020.

Top-20 Companies by Sales**

Data Period: 2020/4 -2020/9



- Combined sales of top-20 marketing-companies constitutes 64.4% (-0.8 PP YoY) of the total Japan pharma sales at ¥3,137.1 Billion (-5.3% YoY) for the 1H FY 2020.
- Among top-20 companies - sales ratio of Japanese Companies to Foreign Companies was about 53:47 (same as in 1H FY 2019). Total sales of Japanese Companies among top-20 companies were ¥1,665.4 Billion (-5.2 % YoY), while for the Foreign Companies it was ¥1,471.7 Billion (-5.4 % YoY) for the period.
- Among top-20 companies **Takeda** and **Daiichi-Sankyo** retained top two positions. Total eight companies in top-20 moved-up in their ranks, which include – **Sumitomo Dainippon** (moved 5 ranks up, with +26.3% YoY growth (largely due to transfer of distribution rights for **Equmet** and **Equa** from Novartis on the first of November 2019), **Jansen** and **AstraZeneca** (both moved 2 ranks up) and **Pfizer**, **Mitsubishi Tanabe**, **Eli Lilly**, **Nippon Boehringer Ingelheim**, and **Eisai** (each moved-up by 1 position).
- Total six companies fell on their ranks compared to same period last year are – **Kyowa Kirin** (down 3 ranks), **Novartis**, **GlaxoSmithKline**, and **Nichi-Iko** (by two ranks each) and **Chugai** and **Bayer Yakuhi** (down by 1 rank each).
- Among top-20, **Sumitomo Dainippon** was a new entry, while **Santen** (+2.4% YoY) lost its position from the top-20s.