



# Encise 1H FY 2020 Snapshot

(NHI Price Based)

April 2020 to September 2020

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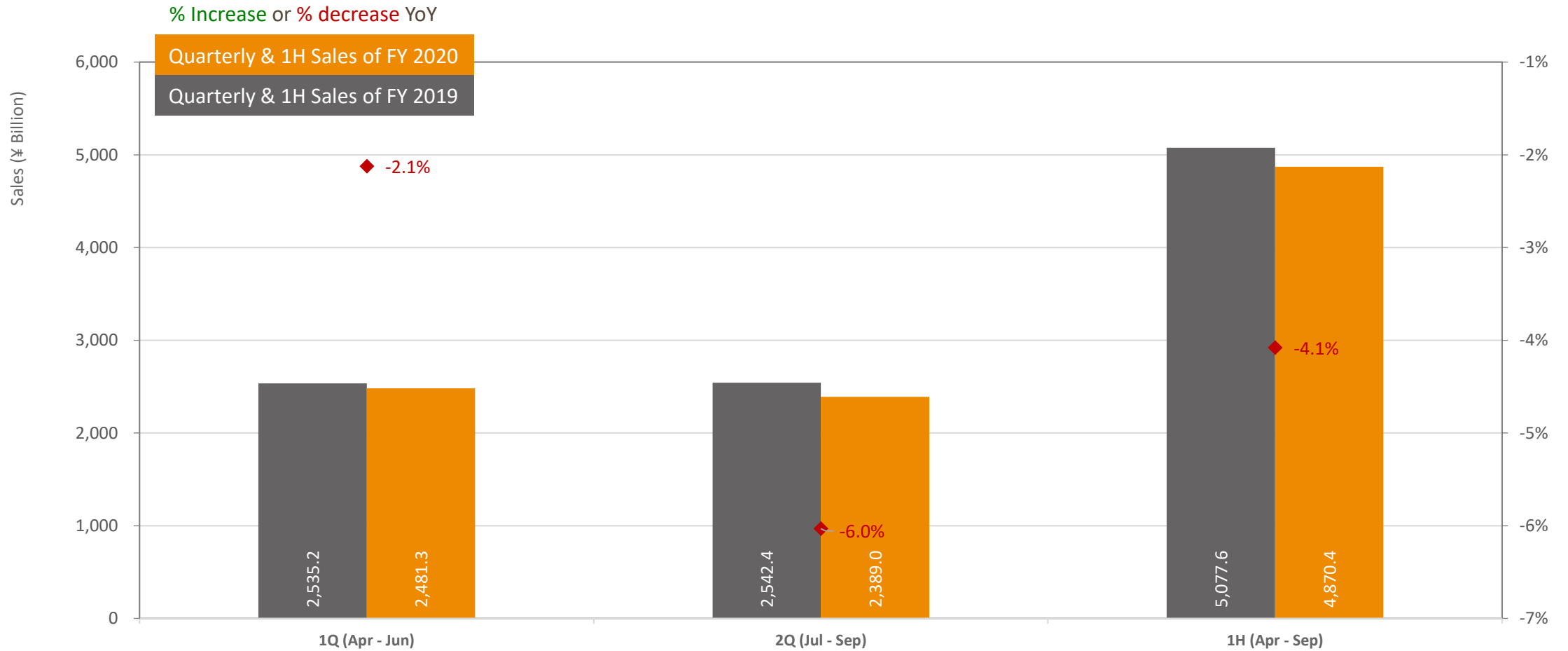


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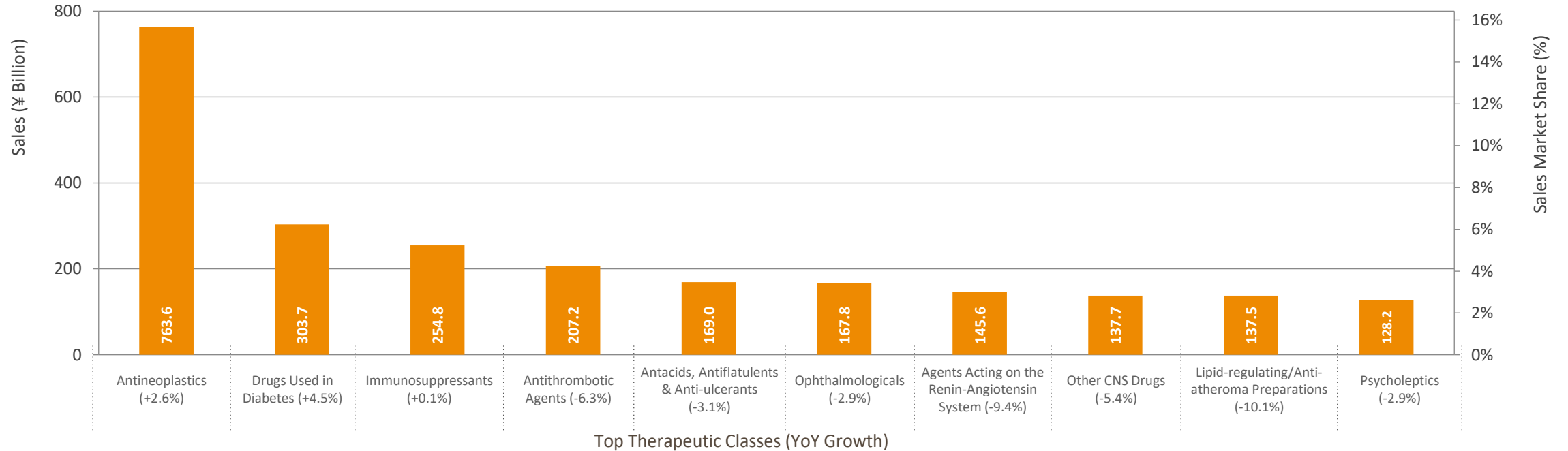
# Period at Glance (% Growth YoY)

Data Period: 2020/4-2020/9



# Top-10 Therapeutic Classes by Sales

Data Period: 2020/4 -2020/9

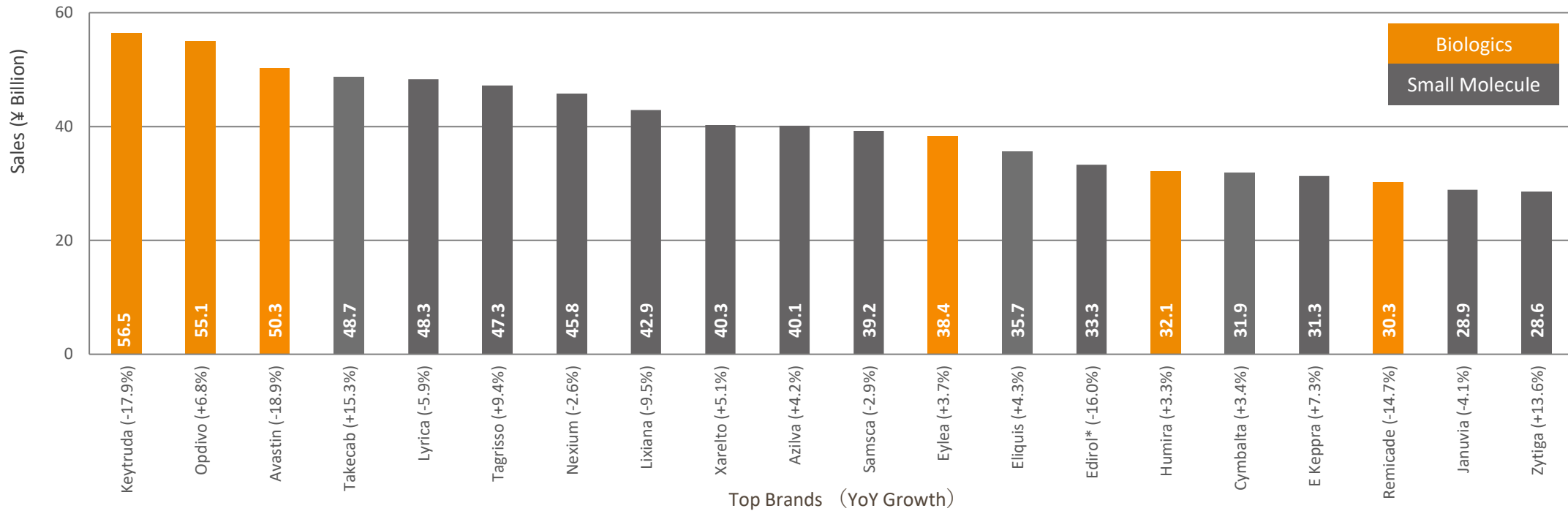


- Top-10 therapeutic classes form 49.6% of the total Japan pharma sales at ¥2,415.2 Billion (-2.0% YoY) for the 1H FY 2020. Due to COVID-19 pandemic impact, seven of the top 10 therapeutic categories posted negative YoY growth. However, Drugs used in Diabetes, Antineoplastics, and Immunosuppressants 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



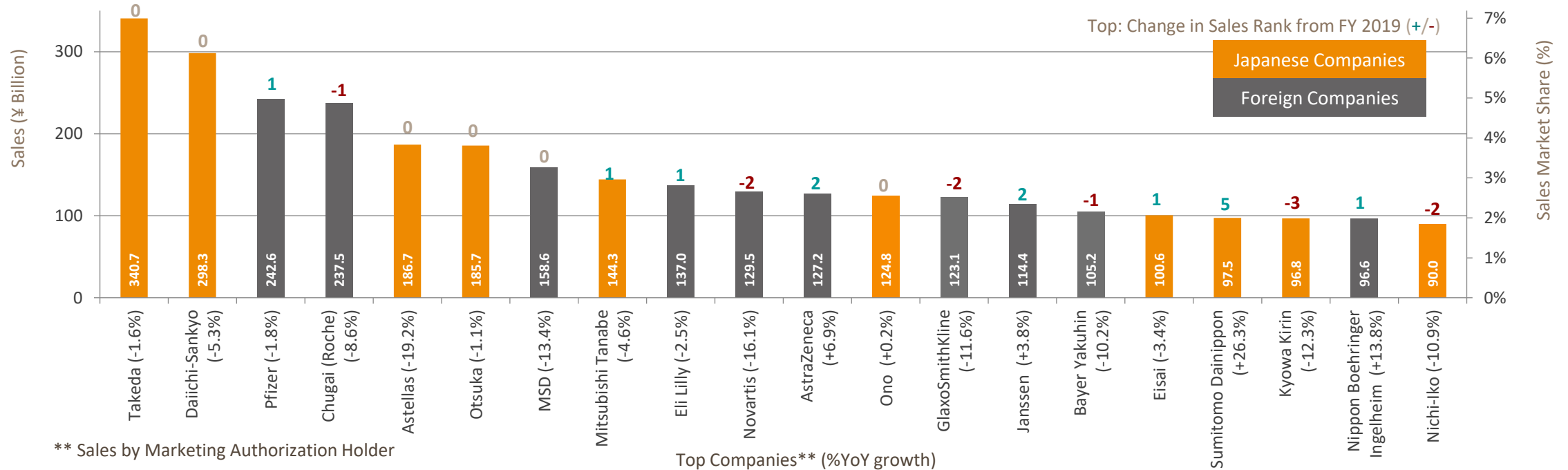
\* Total Sales of the Brand marketed by more than one company.

- 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.