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FY 2020 Snapshot

(NHI Price Based)

April 2020 to March 2021

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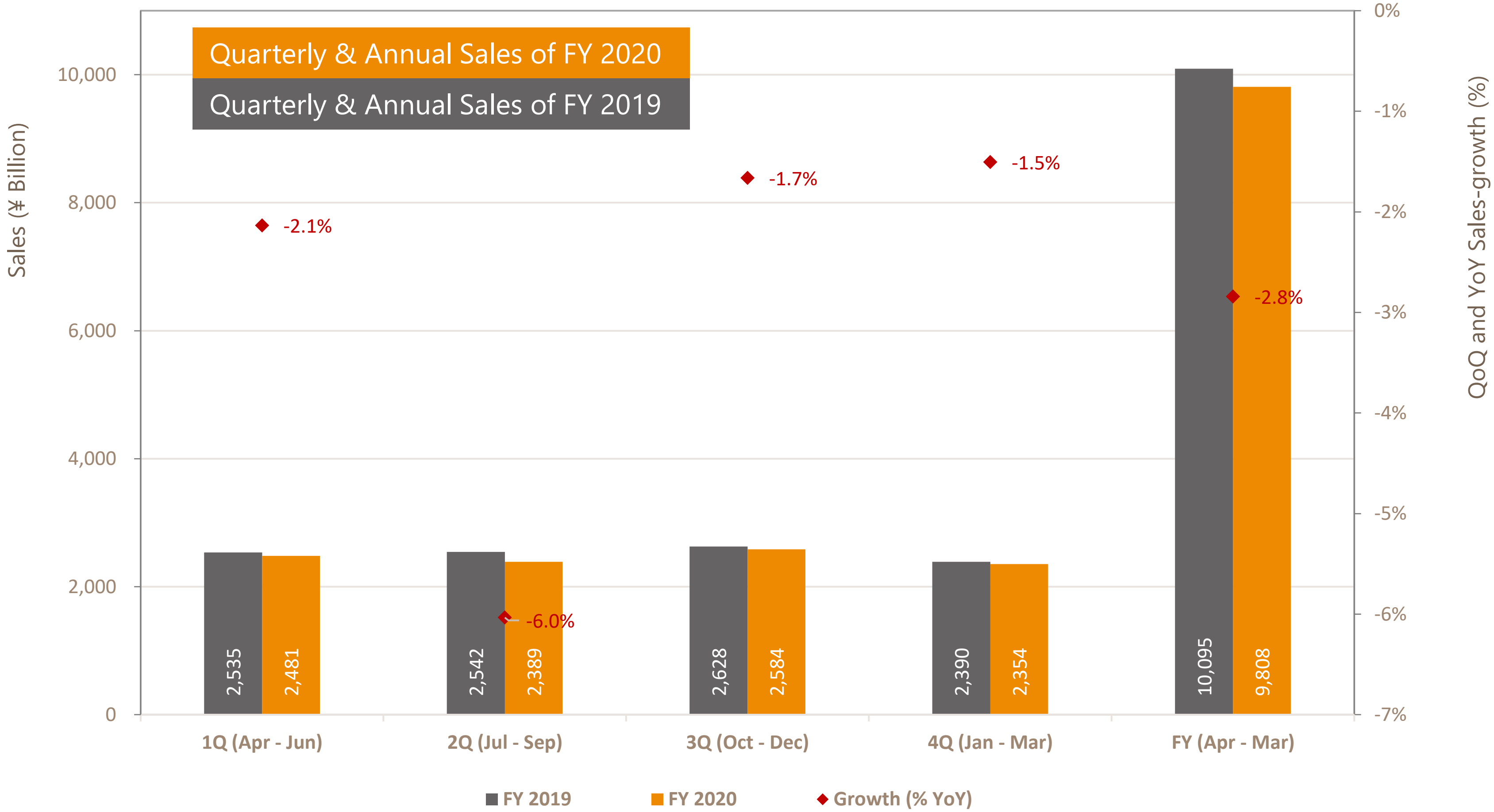
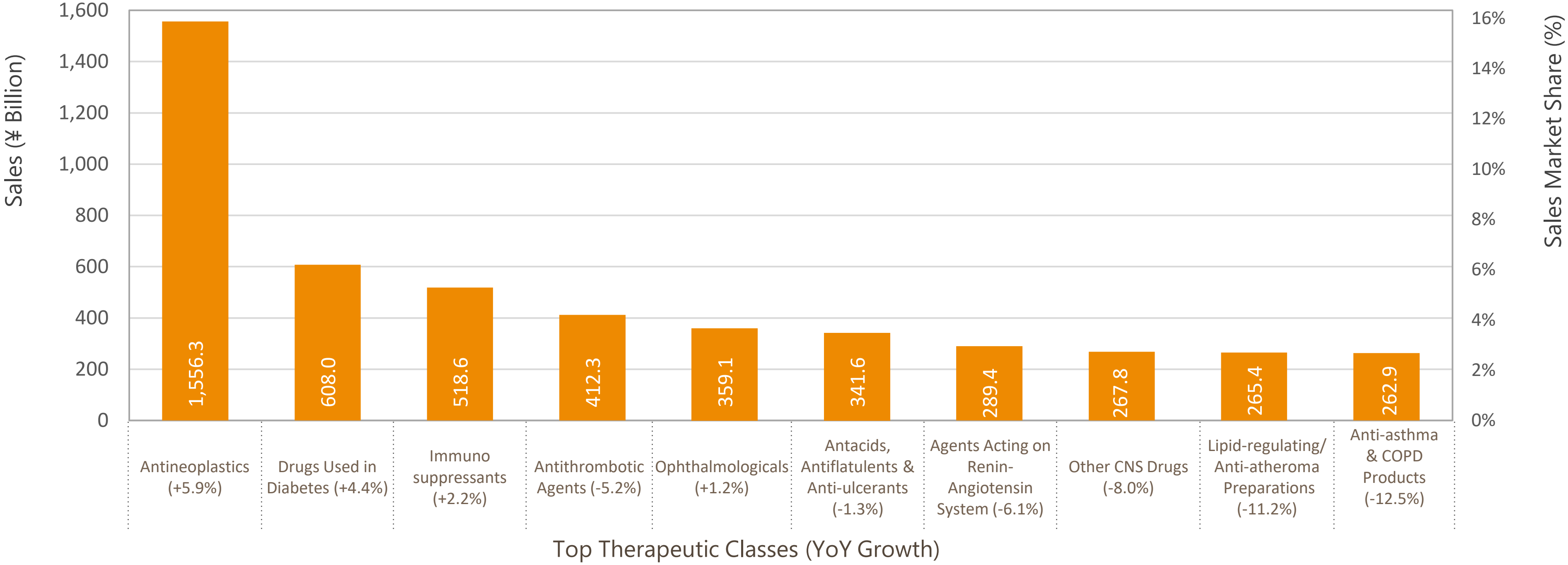
Monitoring Pharmaceutical Industry for the Society

FOR THE NEXT GENERATION. FOR THE PATIENTS.

Period at Glance (QoQ and YoY) Data Period: FY2019/ FY2020



Top-10 Therapeutic Classes by Sales Data Period: 2020/4 -2021/3



- Top-10 Therapeutic Classes form 49.8% of the total Japan pharma sales at ¥4,881.4 Billion (-0.3% YoY).
- Antineoplastics form 15.9% of the total NHI-market and continue to grow (5.9% YoY). In Antineoplastics, the key contributing brands for the growth included Tecentriq (¥53.0 Billion, 80.5% YoY), Opdivo (¥112.7 Billion, 14.7% YoY), Ofev (¥42.4 Billion, 37.8% YoY) etc.
- In Antineoplastic sub-categories, Protein Kinase inhibitors and MAbs together form 74.1% share and grew at 7.4% YoY. Antineoplastics sub-segments which posted degrowth are - Antimetabolites, Platinum Agents, Alkylating Agents, and Antitumor antibiotics. They together posted ¥157.8 Billion (-5.2% YoY). In MAbs, the sales of Immune Check-Point Inhibitors were ¥331.0 Billion (10.4% YoY).
- Drugs used in Diabetes' was the second largest therapeutic class both on the sales and YoY% growth parameters at ¥608.0 Billion (4.4% YoY). The growth of the class was mainly driven by 'SGLT-2 inhibitors' and 'GLP-1 agonists', which posted ¥157.9 Billion (22.0% YoY), and ¥56.9 Billion (19.9% YoY) respectively. 'DPP-IV inhibitors' continue to hold the largest market share within the therapeutic category at 42.0%, but their sales declined to ¥255.3 Billion (-2.5% YoY).

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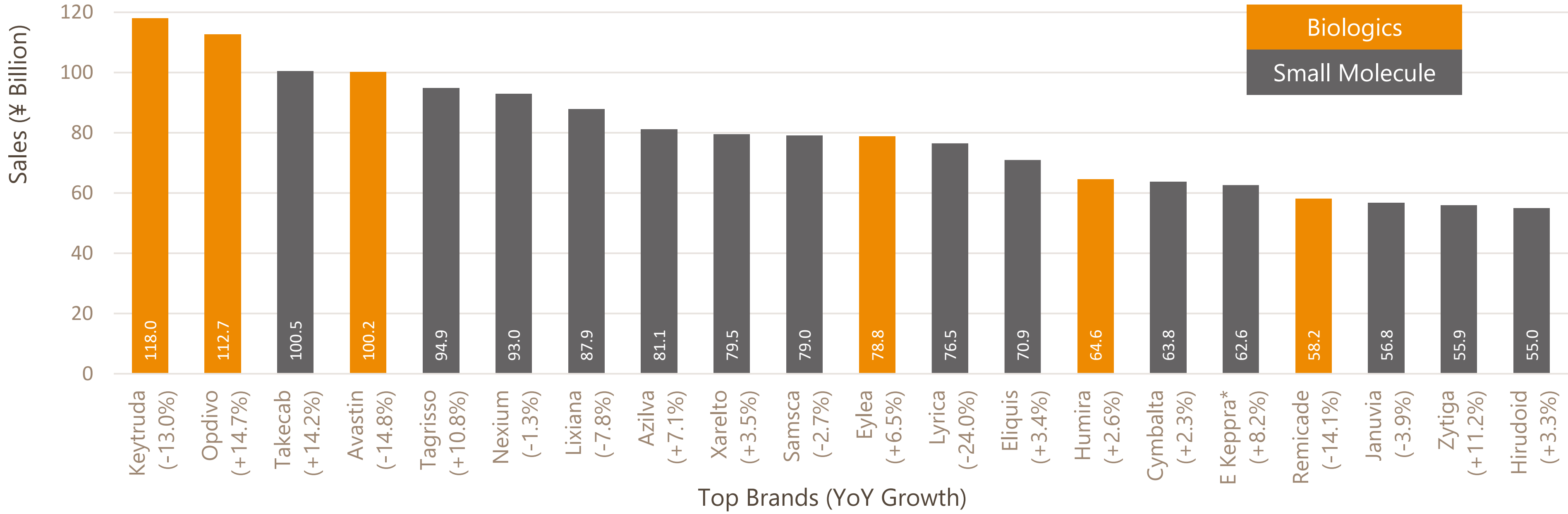
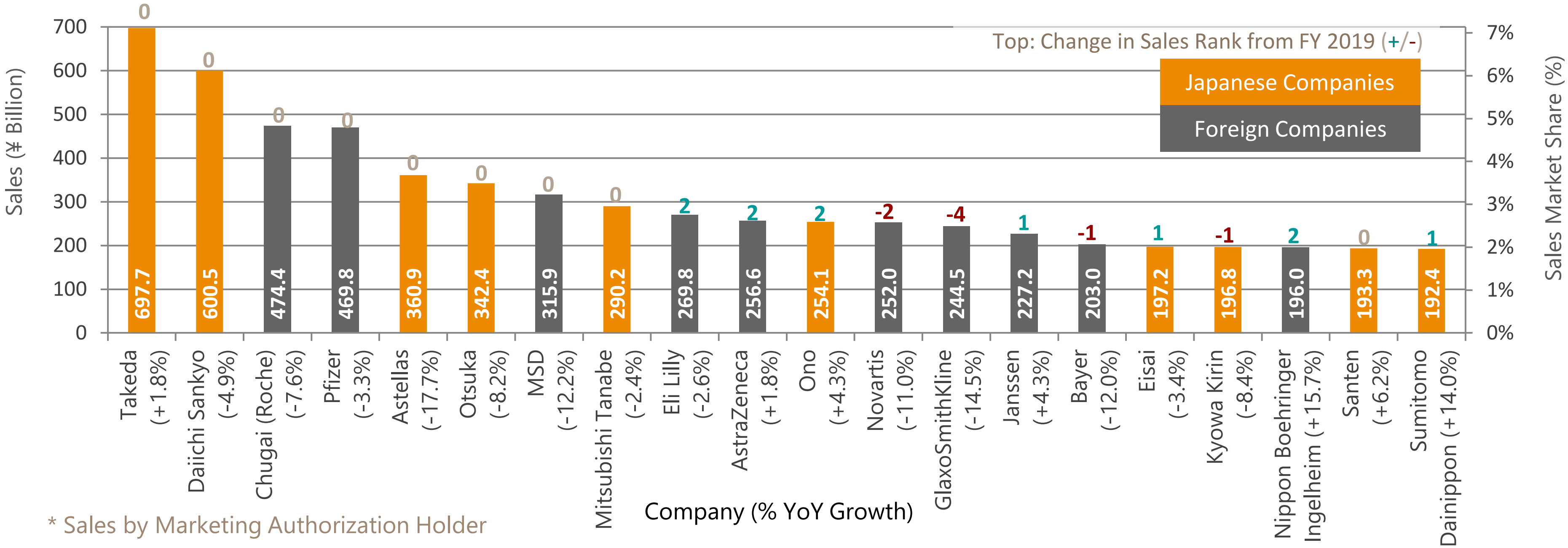
Top-20 Brands by Sales Data Period: 2020/4 -2021/3



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

- Combined sales of top-20 pharmaceuticals brands for the FY 2020 totaled ¥1,590.0 Billion and constituted 16.2% of the total Japan pharma sales for the period.
- The combined sales of top-20 pharmaceuticals brands for the FY 2020 declined by 3.3% compared to FY 2019. It was largely due to decline in the sales of Lyrica (-24.0% YoY), Keytruda (-13.0 YoY), Avastin (-14.8% YoY), and Remicade (-14.1% YoY), however the sales of Opdivo (14.7% YoY), Takecab (14.2% YoY), Tagrisso (10.8% YoY) etc. increased.
- Biologics Brands constitute 33.5% of the Top-20 Brands sales. It is 0.3 percent point (PP) less than previous year mainly due to declined sales of major biologics like Keytruda, Avastin, Remicade etc.
- Brands Entering and Exiting 'Top-20 Club' in FY 2020 (on YoY basis): Three New Brands made entry into the top-20 club this year are – E Keppra (at rank 16, 8.2% YoY), Zytiga (at rank 19, 11.2% YoY) and Hirudoid (at rank 20, 3.3% YoY) and the three brands which exited are – Edirol (-37.0% YoY), Maviret (-21.8% YoY), and Zetia (-58.2% YoY).

Top-20 Companies by Sales* Data Period: 2020/4 -2021/3



* Sales by Marketing Authorization Holder

- Combined sales of top-20 'marketing-companies' constitutes 63.6% (down by 1.2PP YoY) of the total Japan pharma sales at ¥6,235.0 Billion (-4.7% YoY) for the FY 2020.
- Among top-20 companies - sales ratio of Japanese Companies to Foreign Companies was ~53:47 (unchanged from FY 2019). Total sales of Japanese Companies among top-20 companies was ¥3,325.6 Billion (-4.1% YoY), while for the Foreign Companies it was ¥2,909.3 Billion (-5.4% YoY) for the period.
- Among the top-20 companies – the position of top eight companies remained unchanged. A total of seven companies posted growth in FY 2020, while the sales of remaining thirteen companies fell.
- Sumitomo Dainippon was a new entry into the top-20 club in FY 2020 (due to contribution from Equmet and Equa, which together posted ¥47.6 Billion. Both brands were transferred from Novartis in FY 2019), it replaced Nichi-Iko (¥182.7 Billion, -7.5% YoY) which slipped three positions down.
- Eli Lilly, AstraZeneca, Ono, and Nippon Boehringer Ingelheim, each of them improved their rank by two positions in FY 2020. Among others, GlaxoSmithKline slipped four positions down mainly due to declining sales of Avolve (¥14.0 Billion, -57.6% YoY) and Xyzal (¥13.6 Billion, -57.0% YoY), which faced generics entry in FY 2020.