



Encise 1H FY 2021 Snapshot

(NHI Price Based)

April 2021 to September 2021

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Monitoring Pharmaceutical Industry for the Society

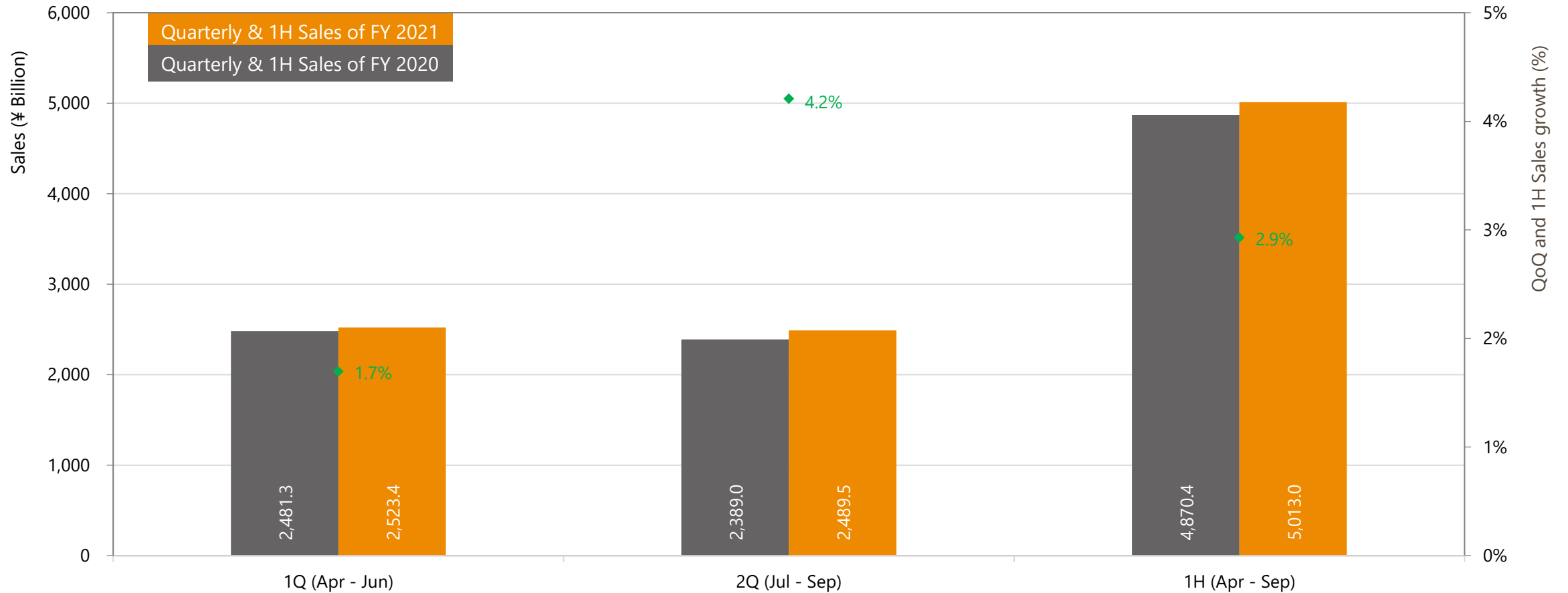
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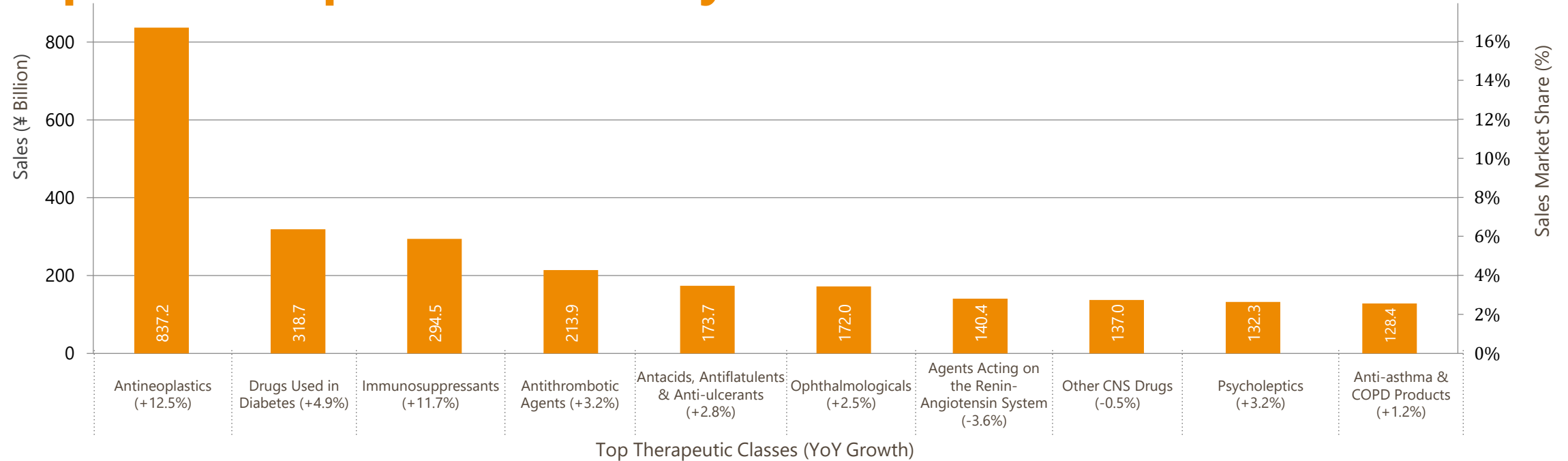
Period at Glance (% Growth YoY)

Data Period: 2021/4-2021/9



Top-10 Therapeutic Classes by Sales*¹

Data Period: 2021/4 -2021/9

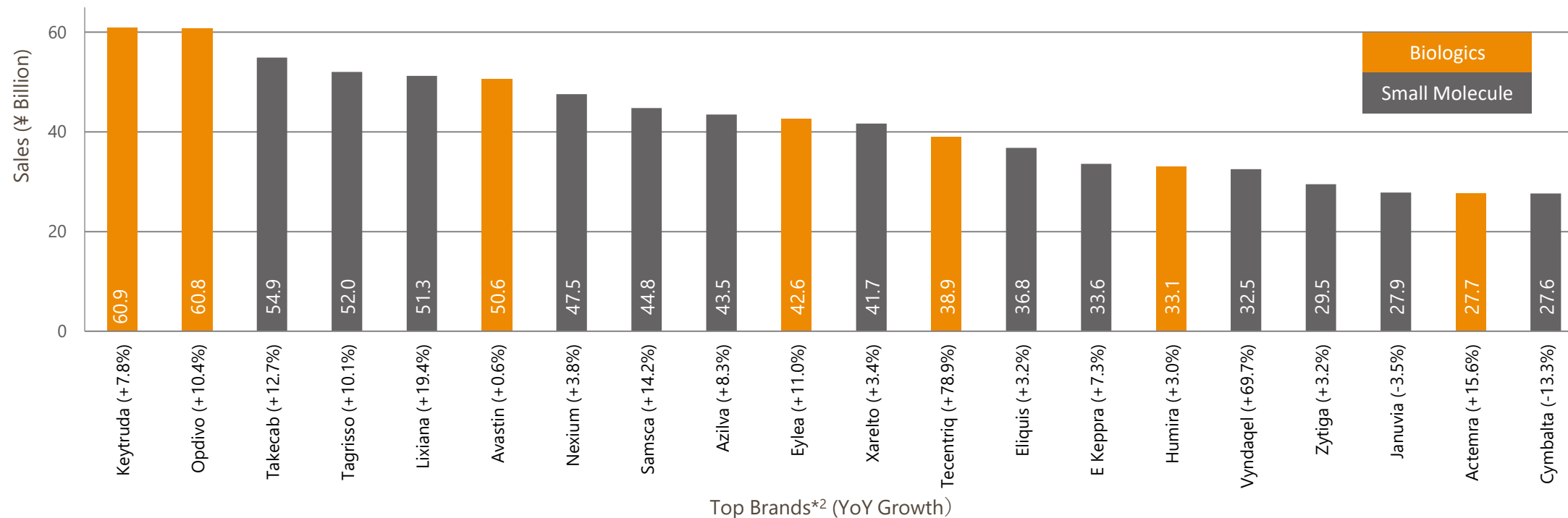


*¹ The sales were aggregated based on the therapeutic classification as of 1 October 2021.

- Top-10 therapeutic categories form 50.8% of the total Japan pharma sales at ¥2,548.2 Billion (6.0% YoY) for the 1H FY 2021. As the pharma market came out of negative impact of COVID-19 pandemic during the same period previous year, eight of the top 10 therapeutic categories posted positive YoY growth. Among growing categories – ‘Antineoplastics’ and ‘Immunosuppressants’ posted double digits YoY growth (12.5% and 11.7% respectively). However, the ‘Agents Acting on the Renin-Angiotensin System’ and ‘Other CNS Drugs’ continue to decline at -3.6% and -0.5% respectively.
- Antineoplastics (Oncology):** **Keytruda** (¥60.9 Billion, 7.8% YoY), **Opdivo** (¥60.8 Billion, 10.4% YoY), **Tagrisso** (¥52.0 Billion, 10.1% YoY) and **Avastin** (¥50.6 Billion, 0.6% YoY) continue to grow and remain the top selling brands from the class. However, **Tecentriq** was the biggest contributor to the growth of the class. It posted ¥38.9 Billion at 78.9% YoY growth.
- Immunosuppressants:** key contributor to the growth of the category included **Dupixent** (¥22.5 Billion, 71.6% YoY), **Stelara** (¥25.9 Billion, 56.1% YoY), **Olumiant** (¥11.8 Billion, 64.3% YoY) etc. **Humira** (¥33.1 Billion, 3.0% YoY) continues to be the top selling brand from the category.

Top-20 Brands*² by Sales

Data Period: 2021/4 -2021/9

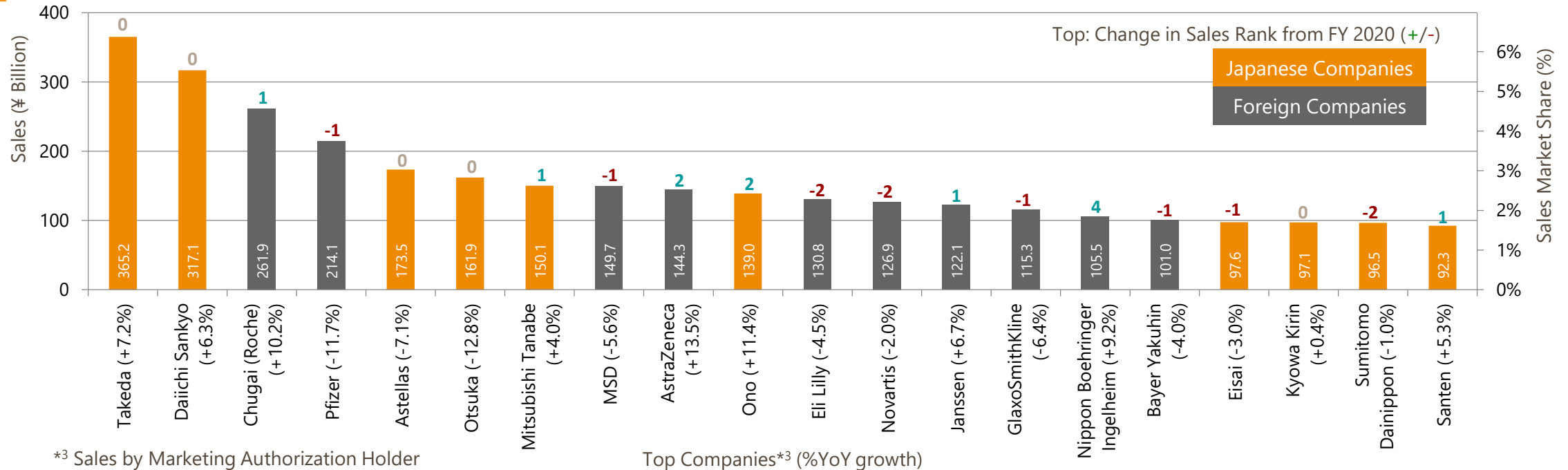


*² Total Sales of the Brand marketed by more than one company (including topical agents).

- The combined sales of top-20 pharmaceutical brands for the 1H FY 2021 totaled ¥838.2 Billion and constituted 16.7% of the total Japan pharma sales for the period.
- **Brands Entering 'Top-20 Club' in 1H FY 2021:** Three new Brands made entry into the top-20 club this period are - **Tecentriq** (at rank 12), **Vyndaqel** (at rank 16), and **Actemra** (at rank 19).
- **Brands Exiting 'Top-20 Club' in 1H FY 2021:** Included **Remicade** (¥26.5 Billion, -12.3% YoY), **Edirol***² (¥17.0 Billion, -49.0% YoY), and **Lyrica** (¥11.4 Billion, -76.4% YoY).

Top-20 Companies by Sales*3

Data Period: 2021/4 -2021/9



- Combined sales of top-20 marketing-companies constitutes 63.1% (-1.34 PP YoY) of the total Japan pharma sales at ¥3,161.7 Billion (0.8% YoY) for the 1H FY 2021.
- Among top-20 companies - sales ratio of Japanese Companies to Foreign Companies was about 53:47 (same as in 1H FY 2020). Total sales of Japanese Companies among top-20 companies were ¥1,690.3 Billion (1.5 % YoY), while for the Foreign Companies it was ¥1,471.5 Billion (0.0 % YoY) for the period.
- Among top-20 companies **Takeda** and **Daiichi-Sankyo** retained top two positions. Total seven companies in top-20 moved-up in their ranks, which include – **Nippon Boehringer Ingelheim** (moved 4 ranks up, with +9.2% YoY growth. Idiopathic pulmonary fibrosis (IPF) treatment Ofev (¥26.4 Billion, 36.0% YoY) and the SGLT2 inhibitor Jardiance (¥17.3 Billion, 26.3% YoY) were the key contributor to its growth), **AstraZeneca** and **Ono** (both moved 2 ranks up) and **Chugai (Roche)**, **Mitsubishi Tanabe**, **Janssen** and **Santen** (each moved-up by 1 position).
- Total eight companies fell on their ranks compared to same period last year are – **Eli Lilly**, **Novartis** and **Sumitomo Dainippon** (each down by 2 ranks), and **Pfizer**, **MSD**, **GlaxoSmithKline**, **Bayer Yakuhin** and **Eisai** (down by 1 rank each).
- Among top-20, **Santen** was back to the group, while **Nichi-Iko** (-31.5% YoY) lost its position from the top-20s.