

Pharmaceutical Wholesale Business in Japan: Key Research Findings 2012

◆ Research Outline

Yano Research Institute has conducted a study on domestic pharmaceutical wholesale business with the following conditions:

1. Research period: From September to November, 2012
2. Research targets: Member companies of the Federation of Japan Pharmaceutical Wholesalers Association, and companies in the business of pharmaceutical wholesale
3. Research methodologies: Questionnaire by the expert researchers, and literature research

What is Size of Pharmaceutical Wholesale Business?

The size of pharmaceutical wholesale business in this research indicates the total value of pharmaceutical products (total sales from targeted companies) distributed through pharmaceutical wholesalers to medical facilities and pharmacies. Therefore, those pharmaceutical products directly sold by manufacturers, sold through their agents, or sold through food wholesalers are not included.

Note that number of companies differ among the wholesale business of the following categories: Pharmaceutical products, ethical drugs, and non-prescription drugs.

◆ Key Findings

■ Business Size of Pharmaceutical Wholesalers in FY2011 Increased by 3.7% Y-o-Y

In spite of negative factors such as expansion of generic drugs, the pharmaceutical wholesale business exceeded the size in the previous year by 3.7% to reach 8,522.8 billion yen in FY2011, based on the sales of the leading 28 pharmaceutical wholesalers, because of increased cases of added pharmaceutical prices for new drugs development.

■ Business Size of Ethical Drugs Wholesalers in FY2011 Rose by 4.2% Y-o-Y

The size of ethical drugs wholesale business in FY2011 increased by 4.2% from the previous year to attain 8,039.661 billion yen based on the sales of the leading 22 ethical drugs wholesalers.

■ Business Size of Non-Prescription Drugs Wholesalers in FY2011 Declined by 4.0 Y-o-Y

The size of wholesale business of non-prescription drugs in FY2011 decreased by 4.0% from the previous year to end up at 409.783 billion yen, based on the sales of the leading 17 non-prescription drugs wholesalers.

◆ **Report format:**

Published report: “Pharmaceutical Wholesalers Directory 2012”

Issued on: November 30, 2012

Language: Japanese

Format: 385 pages in A4 format

Price: 57,500 yen (2,750 yen of consumption tax shall be charged for the sales in Japan.)

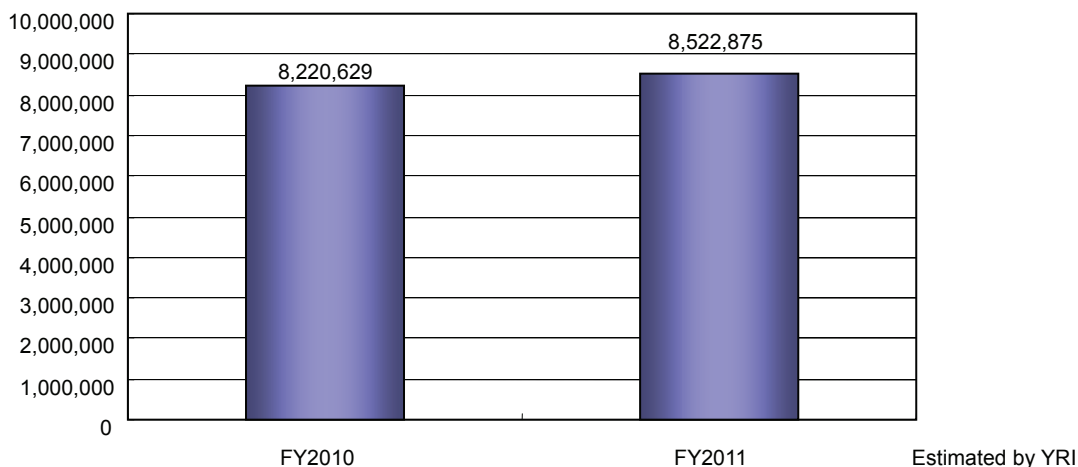
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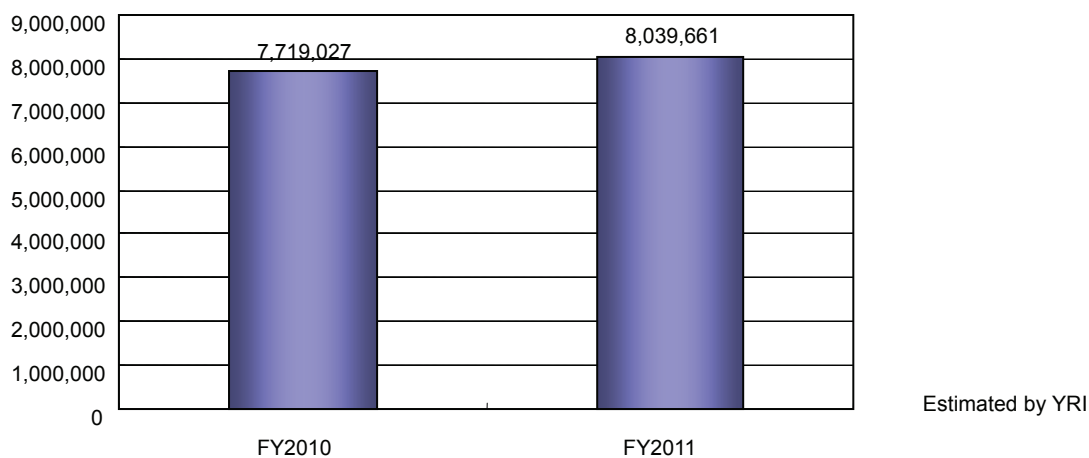
■ **Figure 1: Transition of Size of Pharmaceutical Wholesale Business**



Notes:

1. The figures are based on the sales of the leading 28 pharmaceutical wholesalers.

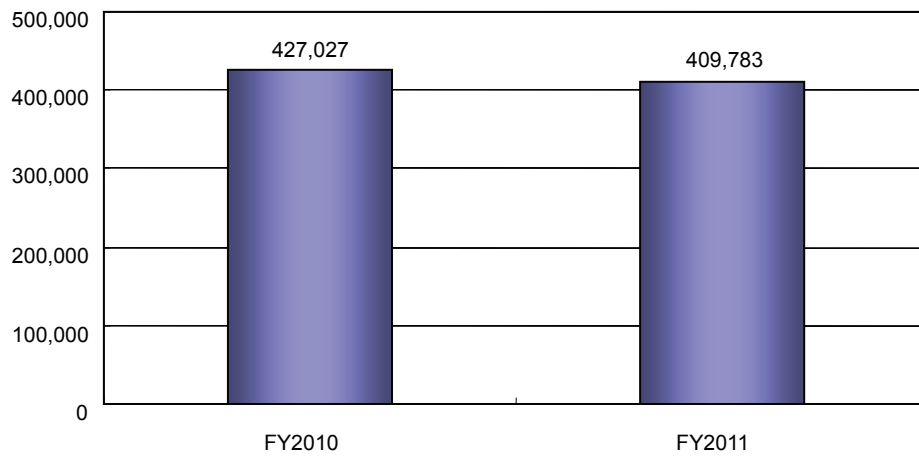
■ **Figure 2: Transition of Wholesale Business Size for Ethical Drugs**



Notes:

2. The figures are based on the sales of the leading 22 pharmaceutical wholesalers.

■ **Figure 3: Transition of Wholesale Business Size for Non-Prescription Drugs**



Estimated by YRI

Notes:

3. The figures are based on the sales of the leading 17 pharmaceutical wholesalers.