

Pharmacy Groups in Japan: Key Research Findings 2016

◆ Research Outline

Yano Research Institute has conducted a study on the domestic pharmacy groups with the following conditions:

1. Research period: From September 2016 to February 2017
2. Research targets: Domestic pharmacy groups
3. Research methodologies: Face-to-face interviews by the expert researchers, surveys via telephone/email, literature research (from publication of each of regional bureaus of health and welfare and materials disclosed by the pharmacy groups), and surveys using our health insurance pharmacies DB

What are the Pharmacy Groups?

The pharmacy groups in this research indicate the founders (corporation, organization or individual) that operate 20 or more of health insurance pharmacies.

This research summarizes the trends of the pharmacy groups through publications on health insurance pharmacy founders by Regional Bureau Health and Welfare and through our DB on pharmacy groups.

◆ Key Findings

■ 221 Pharmacy Groups Exist as of 2016, Number of Pharmacies Belonging to Those Groups Occupies 30.6% of Total Number of Health Insurance Pharmacies Nationwide

Number of pharmacy groups (or the pharmacy founders operating 20 or more of health insurance pharmacies) in 2016 is 221, and sum of pharmacies that belong to such groups is 17,476 which accounts for 30.6% of the total number of health insurance pharmacies throughout the country, which is 57,137.

Number of domestic health insurance pharmacies is still on the rise, but the decreasing population and slackening growth in separation of medical practice and drug dispensation have turned the number of pharmacies to a decline in some prefectures.

■ 16.3% of Entire Pharmacy Groups Develop Their Business within One Prefecture

When looking at distribution of the pharmacies that belong to 221 pharmacy groups (or the pharmacy founders operating 20 or more of health insurance pharmacies) to see the locations of such pharmacies: 16.3% of the pharmacy groups have their pharmacies located within the same prefecture, followed by those groups with their pharmacies located across four prefectures accounting for 14.0%, and those across three prefectures 13.1%. It shows that many of the pharmacy groups possess their pharmacies within nearby areas, i.e. in the same prefecture or across neighborhood prefectures, otherwise by city block.

■ Business Models based on Vision of “Pharmacies for Patients” Expected to Bring About Dramatic Changes in Environment surrounding Pharmacy Groups

As the vision of “Pharmacies for Patients” has been hammered out by MHLW, health insurance pharmacies are now required to relinquish location-dependent business and rather to have a function of family doctors for their patients living in the neighborhood. With some business models having been launched to press ahead with the vision since FY2016, dramatic changes are expected in the environment surrounding pharmacy groups.

◆ **Report Format:**

Published report: “Yano Pharmacy Data Report 2017”

Issued on: February 28, 2017

Language: Japanese

Format: 606 pages in A4 format

Price: 250,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

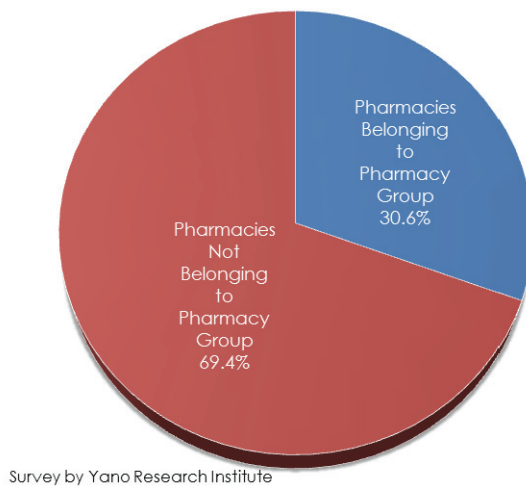
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■ **Figure 1: Ratio of Pharmacy Groups that Possess Health Insurance Pharmacies**



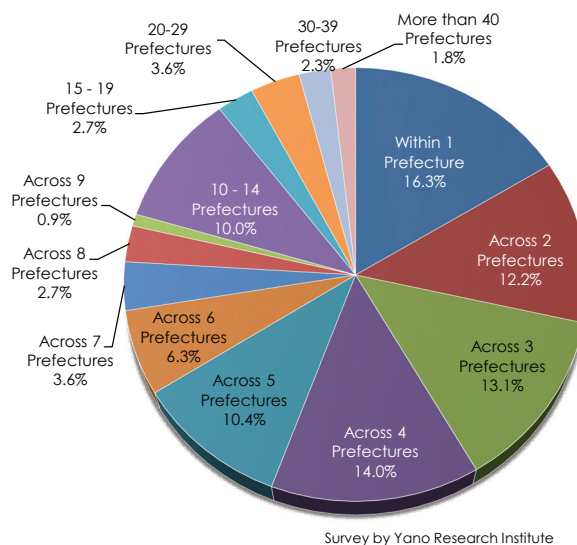
Notes:

1. Research period: From September 2016 to February 2017

Research targets: 57,137 nationwide health insurance pharmacies (as of September 2016)

Research methodologies: Literature research and surveys based on our health insurance pharmacies DB

■ **Figure 2: Number of Prefectures That Pharmacy Groups Develop Business Across**



Notes:

2. Research period: From September 2016 to February 2017

Research targets: 17,647 nationwide health insurance pharmacies that belong to 221 pharmacy groups (as of September 2016)

Research methodologies: Literature research and surveys based on our health insurance pharmacies DB

3. Since the values are rounded, total values within the figure may partly differ.