

Overseas Presence of Pharmaceutical Companies: Key Findings 2011

➤ **Research Outline**

Yano Research Institute has conducted a study on overseas presence of pharmaceutical companies in Japan with following conditions.

1. Research period: November 2010 to February 2011
2. Research targets: Pharmaceutical companies, including those are in different industries
3. Research methodologies: Questionnaire survey by post and literature research

➤ **Key Findings**

◆ **FY 09 overseas sales increased only slightly due to big patent expirations of 2010.**

In fiscal 2009 the overseas sales of major 19 pharmaceutical companies in Japan increased to 2,784 billion and 321 million yen, up 2.6 percent from the previous year. The fiscal 2009 saw a small growth due to the decline in the U.S. market affected by the patent expirations of some of the industry's blockbuster drugs in 2010. By region, the sales in the U.S. market were the largest, accounting for approximately 60 percent.

◆ **Pharmaceutical companies seeking for growth drivers in overseas.**

Under the environment of slowing down pharmaceutical market in Japan, some pharmaceutical companies are strengthening the overseas business by positioning global strategy as one of their growth strategies.

Eighty pharmaceutical companies in Japan have 533 bases in overseas. Bases are concentrated on three regions of Asia, Europe and North America. There are 210 bases in Asia, accounting for 39.4 percent, 153 bases in Europe, accounting for 28.7 percent and 137 bases in North America, accounting for 25.7 percent. Entries into emerging countries are expected to be more active going forward.

➤ **Report format:**

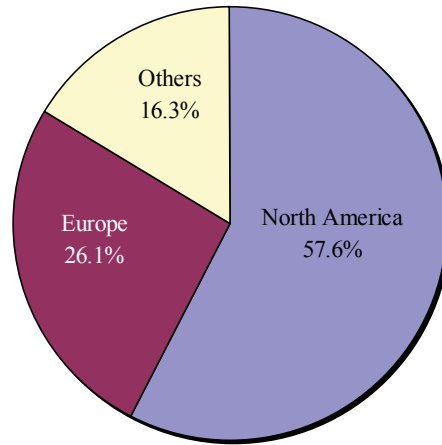
Published report: "Pharmaceutical Company Structure Analysis 2010 to 2011"

Issued in: June 30, 2011 Language: Japanese Format: 291 pages in A4 format

Price: 110,000 yen (5,500 yen of consumption tax will be additionally charged for sales in Japan.)

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[Breakdown of Overseas Sales by Region of Major 16 Pharmaceutical Companies in Japan]

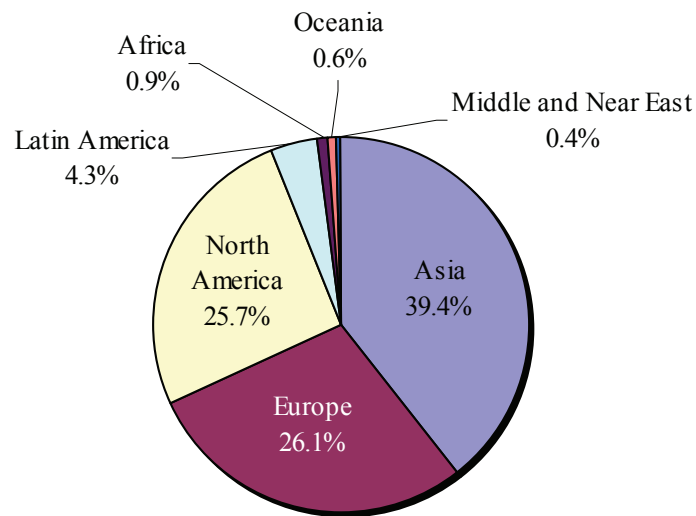


Estimated by Yano Research Institute Ltd.

Note:

1. Based on annual reports.
2. Tallies are made with 16 pharmaceutical companies in Japan that disclose sales by region.

[Breakdown of Overseas Presence by Region of Major 80 Pharmaceutical Companies in Japan]



Estimated by Yano Research Institute Ltd.

Note:

1. Based on open data and post mail questionnaire survey results.
2. Tallies are made with 80 pharmaceutical companies (including those are in different industries) in Japan and 533 locations (local corporations, joint companies, etc.) in February 2011.