

RESEARCH SUMMARY

 **Yano Research Institute Ltd.**  
2-46-2 Honcho, Nakano-ku,  
Tokyo 164-8620, Japan

***Diabetes Market in Japan: Key Research Findings 2011***

 **Research Outline**

**Yano Research Institute has conducted a study on the diabetes market in Japan with following conditions.**

1. Research period: March to June 2011
2. Research targets: Anti-diabetic product manufacturers in Japan
3. Research methodologies: Face-to-face and telephone interviews, literature research

**DEFINITION of Diabetes Market**

The diabetes market in this study consists of the categories of Prophylactic Food, Examination & Diagnosis and Therapy. Prophylactic Food includes combination foods for diabetes patients, blood sugar related FOSHU (foods for specified health use) and low calorie sweetener. Examination & Diagnosis include blood glucose meter (incl. diagnostic reagents and blood collection puncture instrument) and urine glucose monitor and test paper. Therapy includes diabetes treatment medication (hypoglycemic agent, insulin preparation) and complications treatment medication (diabetic neuropathy).

 **Key Findings**

- ◆ **FY 10 diabetes market size is JPY 434,470 million, with year-on-year growth of approximately 1.6%**

The fiscal 2010 market size of anti-diabetic products is expected to reach 434,470 million yen based on manufacturer shipment (therapy sector is based on health insurance list price). Due to the increase in the number of diabetes patients, including would-be patients, the market is in an expanding trend. The fiscal 2010 market is anticipated to increase by approximately 1.6 percent from the previous year.

The size of therapy sector, which represents more than 70 percent of the diabetes market, is expected to be 329,800 million yen in fiscal 2010. The size of examination & diagnosis sector is anticipated to be 72,490 million yen and that of prophylactic food sector 32,180 million yen.

The fiscal 2011 diabetes market size is forecast to be 450,660 million yen. The therapy sector would continue to be the major part in the diabetes market and the total market is expected to grow as sales of DPP-4 inhibitors and other hypoglycemic agents keep increasing.

- ◆ **New anti-diabetic drugs drive the market and new entrants are entering the examination & diagnosis sector.**

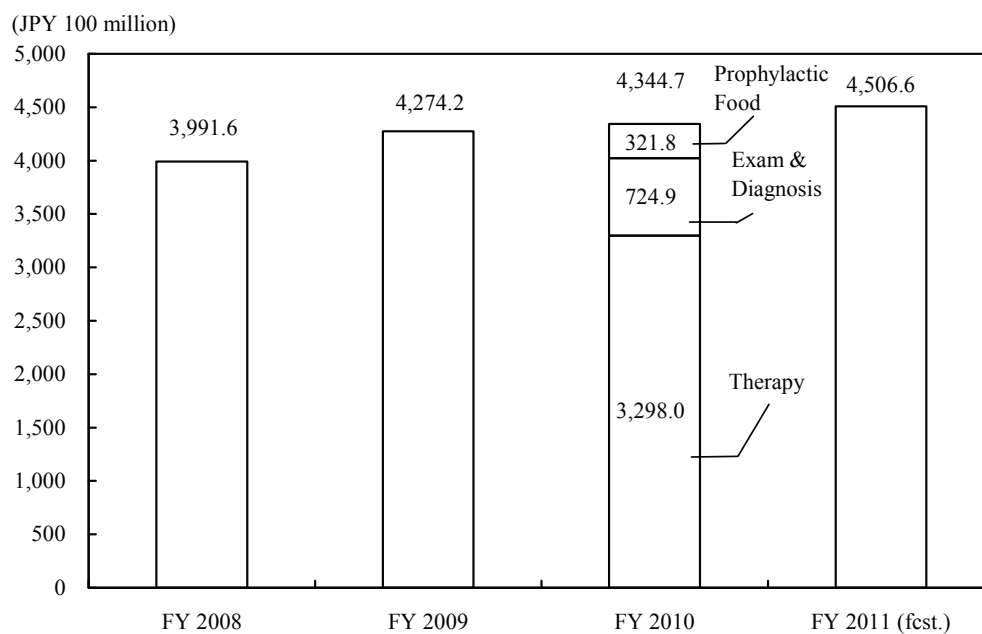
For the therapy sector new diabetes treatment medications which control the rise of blood sugar level and have less risk of hypoglycemia incidence, including DPP-4 inhibitors and GLP-1 preparations, are launched and they are driving the therapy sector. In the examination & diagnosis sector, blood glucose meter products are in a fierce competition for market share. Furthermore, new players are entering the sector. In the prophylactic food sector low calorie sweeteners continue to expand sales as they are promoted as being less harmful to health.

 **Report format:**

Published report: "Diabetes Market 2011"      Issued in: June 22, 2011  
Language: Japanese      Format: 435 pages in A4 format  
Price: 120,000 yen (6,000 yen of consumption tax will be additionally charged for sales in Japan.)

**Contacts:**    Public Relations    **Yano Research Institute Ltd.**  
URL: <http://www.yanoresearch.com>    Phone: +81-3-5371-6912    E-mail: [press@yano.co.jp](mailto:press@yano.co.jp)

## [Market Size of Anti-diabetic Products]



(JPY 100 million)

| Category                               | FY 2008 | FY 2009 | FY 2010 | FY 2011 (fcst.) |
|----------------------------------------|---------|---------|---------|-----------------|
| Total Market of Anti-Diabetic Products | 3,991.6 | 4,274.2 | 4,344.7 | 4,506.6         |

Estimated by Yano Research Institute Ltd.

Note: The figures of “prophylactic food” and “exam & diagnosis” are based on manufacturer shipment.  
The figures of “therapy” are based on health insurance list price.