

## **Pharmaceutical Wholesale Business in Japan: Key Research Findings 2013**

### **◆ 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, 2013
2. Research targets: Member companies of the Federation of Japan Pharmaceutical Wholesalers Association, and companies in the business of pharmaceutical wholesaling
3. Research methodologies: Questionnaire by the expert researchers, and literature research

#### **What is 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 the number of targeted companies vary among the following categories: Pharmaceutical products, ethical drugs, and non-prescription drugs.

### **◆ Key Findings**

#### **■ Business Size of Pharmaceutical Wholesaling in FY2012 Increased Slightly by 1.4% on Y-o-Y Basis**

Size of the pharmaceutical wholesale business in FY2012 continued the growth tendency, though the gains was only slightly by 1.4% to attain 8,637.130 billion yen, based on the sales of the leading 29 pharmaceutical wholesalers. As a result of a series of reshuffling undergone since 1990s the pharmaceutical wholesale business is currently concentrated to four major groups, with 83.4% of the market share occupied by the top five companies.

#### **■ Sales of Generic Drugs Grew to Occupy 7.3% of Total Ethical Drugs Sales of Top 5 Wholesalers**

Size of the ethical drugs wholesale business in FY2012 increased slightly by 1.5% from the previous year to attain 8,149.852 billion yen, based on the sales of the leading 23 ethical drugs wholesalers. As for the sales by category, long-term listed items accounted for 35.4%, items targeted for newly revised pricing (aiming to drive efficient new drug development) accounted for 25.8% and generic drugs accounted for 7.3%. There is a tendency that ratio of long-listed items is decreasing whereas those of newly revised pricing items and generic drugs are increasing.

◆ **Report format:**

Published report: “Pharmaceutical Wholesalers Directory 2013”

Issued on: November 21, 2013

Language: Japanese

Format: 389 pages in A4 format

Price: 63,000 yen (3,000 yen of consumption tax shall be charged for the sales in Japan.)

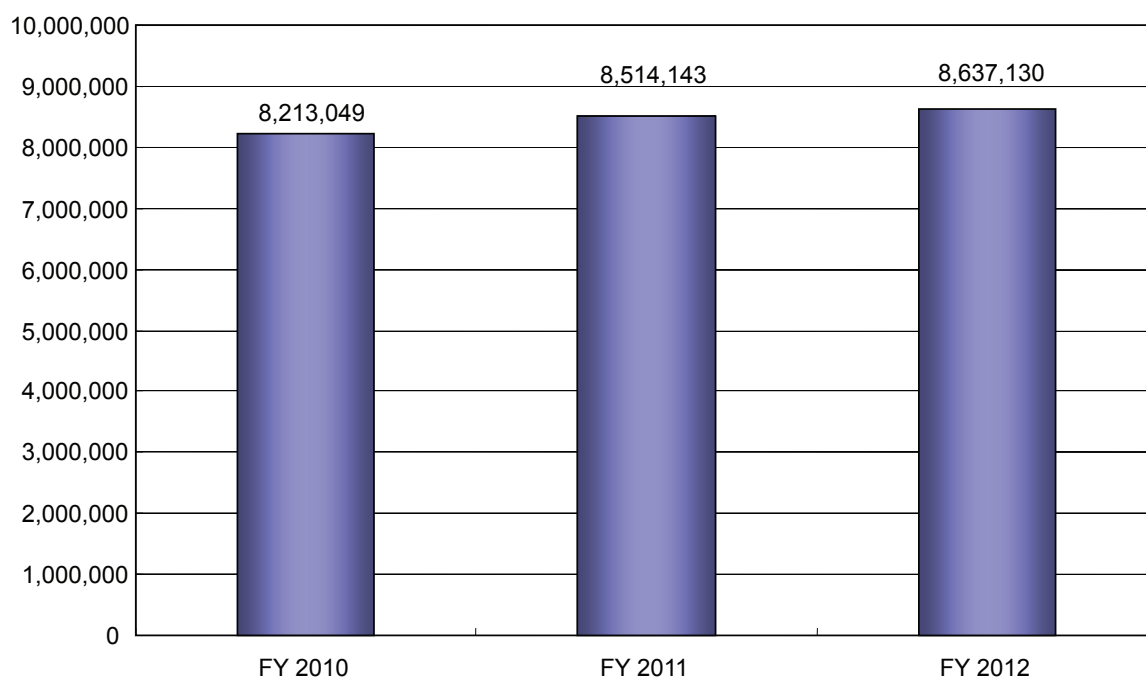
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■ **Figure 1: Transition of Size of Pharmaceutical Wholesale Business**

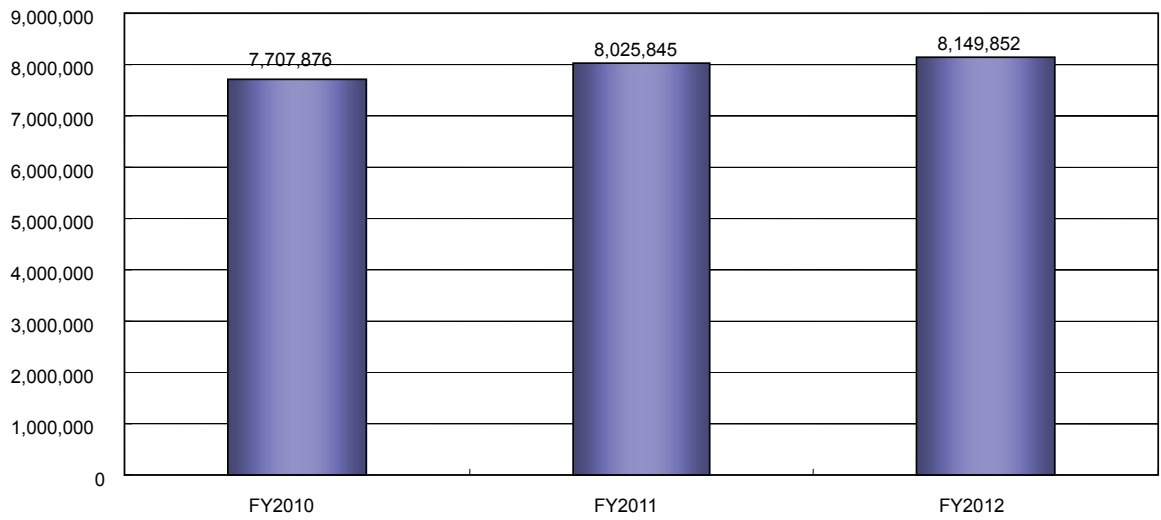


Estimated by Yano

Notes:

1. The figures are based on the sales of the leading 29 pharmaceutical wholesalers.

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

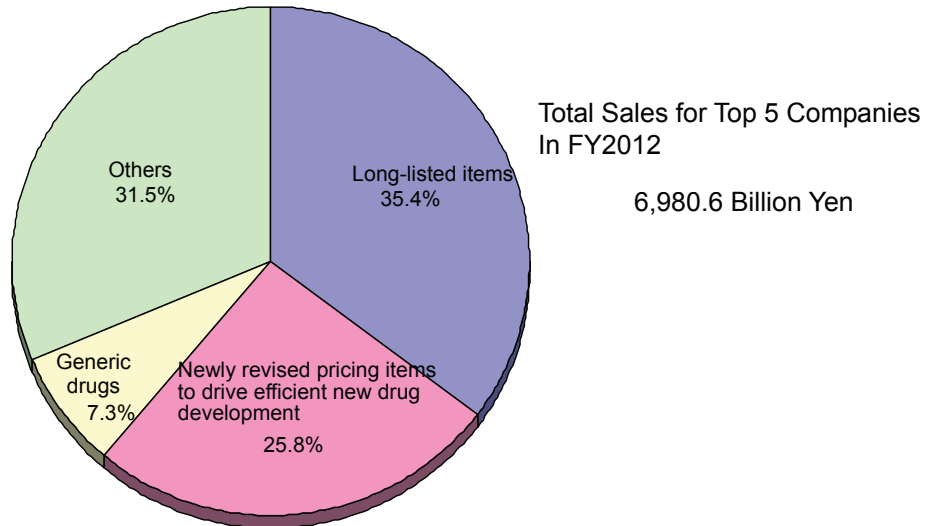


Estimated by Yano

Notes:

- The figures are based on the sales of the leading 23 pharmaceutical wholesalers.

■ **Figure 3: Sales of Top 5 Wholesale Ethical Drugs Business by Category**

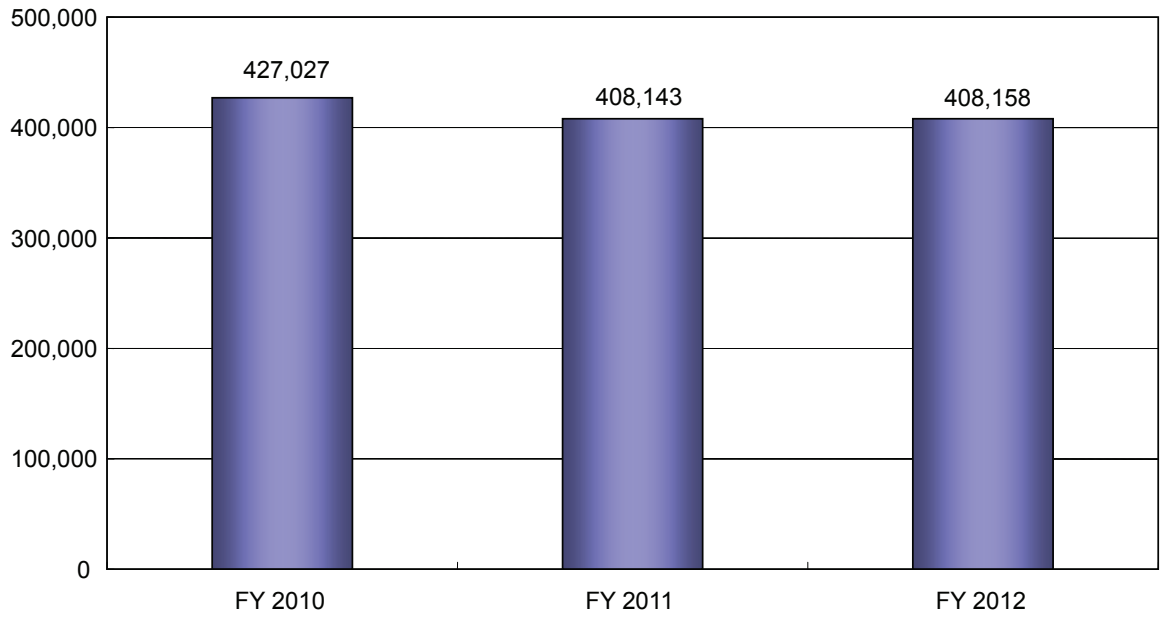


Estimated by Yano

Notes:

- The figures are based on the sales of the top5 companies in the pharmaceutical wholesale business.

■ **Figure 4: Transition of Wholesale Non-Prescription Drugs Business Size**



Estimated by Yano

Notes:

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