

Bio/Healthcare Ventures in Japan: Key Research Findings 2015

◆ **Research Outline**

Yano Research Institute has conducted a study on the domestic bio/healthcare ventures with the following conditions:

1. Research period: From April to July, 2015
2. Research target: Bio/healthcare venture companies, bio/healthcare related pharmaceutical companies, and related organizations
3. Research methodologies: Face-to-face research by the expert researchers, surveys via telephone, and literature search

<What are Bio/Healthcare Ventures?>

Bio/healthcare ventures in this research indicate the venture companies that are launched based on the technologies of bio and healthcare in the field of drug development and reagents for studies.

◆ **Key Findings**

■ **Bio/Healthcare Venture Industry Flourishes Due to Favorable Investment Environment**

Uniqueness and usability of the technologies by some of the domestic bio/healthcare ventures are attracting attentions of the leading life science companies within and outside of Japan, looking for business alliance and for introduction of such technologies. In particular, activities of those venture companies that carry out R&D for regenerative medicines have been flourishing, due to influence by deregulation and by the studies on iPS cells that won the Nobel Prize. The bio/healthcare venture industry is considered to draw more attention because of a series of such ventures having succeeded in being listed, and in concluding contracts for business alignment with the leading companies.

■ **Joint Study and R&D Support by Government and Leading Enterprises Thriving**

Multiple domestic leading companies have introduced a program to attract alignment of and public subscription for technologies in the bio/healthcare domain. The applications for such programs not only ranged from medicines and pharmacies, but also from chemical and engineering. With the recent nationwide tendency of trying to develop advanced medicines including regenerative medicines, the part of which led to launch of Agency for Medical Research and Development Research and Development, the roles of bio/healthcare venture companies have been increasing their presence.

■ **Number of Domestic Bio/Healthcare Ventures on the Rise to Reach 607 as of July 2015**

Number of domestic bio/healthcare venture companies rose to 607 as of July 2015. Ever since the research started in 2004, the number of the concerned companies has been on the rise. As for business sector, the largest sector comprising the industry is innovative drug development, accounting for 24.4%.

◆ **Report format:**

Published report: "Bio/Healthcare Ventures 2015"

Issued on: August 7, 2015

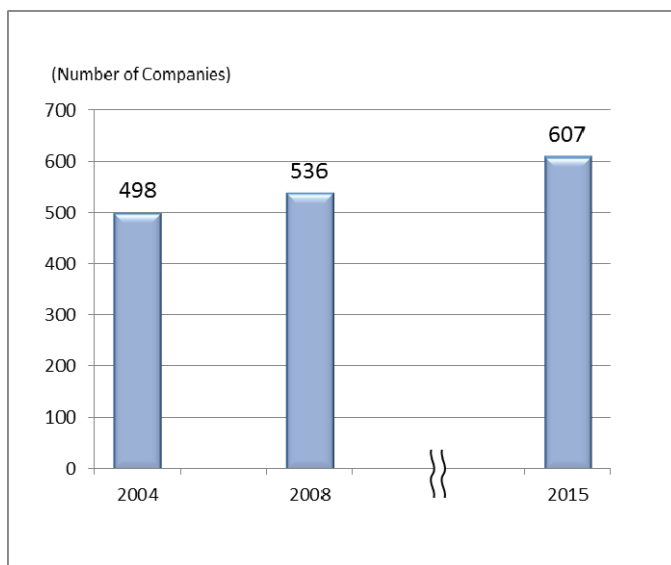
Language: Japanese

Format: 409 pages in A4 format

Price: 150,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

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■ **Figure 1: Transition of Number of Domestic Bio/Healthcare Ventures**



Survey by Yano Research Institute

Notes:

1. Number of ventures in 2015 indicates the number as of July, 2015.

■ **Table 1: Number of market Players by Business Sector (as of July 2015)**

| Business Sector | Number of Market Players | Structure (%) |
|--|--------------------------|---------------|
| Drug development | 148 | 24.4 |
| Contract Analysis on DNA, RNA, and protein | 110 | 18.1 |
| Culture solution, medium, and reagents for studies | 88 | 14.5 |
| Consulting (only for the concerned industry) | 88 | 14.5 |
| Medical equipment/devices | 78 | 12.9 |
| External body diagnosing medicine | 62 | 10.2 |

Survey by Yano Research Institute

Notes:

2. Number of market players indicates 607 domestic bio/healthcare venture companies that are considered to be operating in Japan as of July 2015. (Note that the companies founded before 1990 are not included.)
3. The above business sectors are the extracted top 6 sectors from which 607 companies sectors belong to.
4. There are companies that belong to multiple sectors so that the total number of companies belonging to six sectors and entire number of companies do not match.