Pharmaceutical Wholesalers and Distributors in Japan: 
Key Research Findings 2011

Research Outline

Yano Research Institute has conducted a study on the pharmaceutical wholesalers and distributors industry in Japan with following conditions.

1. Research period: July to September 2011
2. Research targets: 30 pharmaceutical wholesalers and distributors that are a member of Japan Pharmaceutical Wholesalers Association
3. Research methodologies: Questionnaire surveys and literature research

DEFINITION

The pharmaceutical wholesalers and distributors market is the one with drugs distributed to medical institutions, pharmacies and drugstores through pharmaceutical wholesalers, excluding drugs distributed through direct sales, sales companies and food wholesalers.

Key Findings

♦ The FY2010 market size of pharmaceutical wholesalers and distributors business increased from the previous year in spite of the influence of NHI drug prices revision.

The market size of pharmaceutical wholesalers and distributors business in fiscal 2010 (based on the sales of major 30 companies that conduct the pharmaceutical wholesale business) increased by 1.9 percent year-on-year to 8,206,587 million yen although the industry was negatively influenced by the revision of National Health Insurance drug prices and the expansion of generic drugs. The pharmaceutical distribution (wholesale) industry has been concentrated into large four groups with repeated reorganizations and restructurings since 1990s. The industry is oligopoly with the top four companies representing 77.2 percent.

♦ Dispensing pharmacies account for more than 40% among customers due to the progress of separation of prescription and dispensing.

Breakdown of customers by type and size of business of the top six pharmaceutical wholesalers and distributors is: dispensing pharmacies 43.0 percent, large hospitals (with 200 beds or more) 21.8 percent, clinics 15.5 percent, general pharmacies and others 12.1 percent, and small and medium hospitals (with 20 to 199 beds) 7.6 percent. Dispensing pharmacies, which are expanding with the progress of separation of prescription and dispensing, are overwhelming other types of businesses holding the market share of more than 40 percent.

Report format:

Language: Japanese   Format: 303 pages in A4 format
Price: 55,000 yen (2,750 yen of consumption tax will be additionally charged for sales in Japan.)
[Market Size of Pharmaceutical Wholesalers and Distributors Business]

Estimated by Yano Research Institute Ltd.

Note: Based on the value of sales of major 30 companies that conduct the pharmaceutical distribution (wholesale) business.

[FY 2010 Breakdown of Major Pharmaceutical Wholesalers and Distributors
Customers by Type of Business]

Estimated by Yano Research Institute Ltd.

Note: Based on the value of sales of top 6 companies that conduct the pharmaceutical distribution (wholesale) business.