

Japan Pharmaceutical Industry & Forecast-Focus on OTC and Prescription Drugs Market

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Abstracts

The present report entitled “Japan Pharmaceutical Industry & Forecast-Focus on OTC and Prescription Drugs Market”, discuss market size (historical, present and future) of the Japanese pharmaceutical industry and its segments. Drugs market has been categorized by distribution channels (OTC & Prescription drugs) and by type of drugs (Patent & Generic). Report also provides information on recent trends including M&A's, regulatory structure and key issues. Report discusses major drivers promising future growth. The competition prevailing in the pharmaceutical market has also been included in the report with profile of the major players, highlighting their financials as well as growth strategies. The report also talks about future outlook of overall Japanese Pharmaceutical industry and demand for prescription and OTC drugs in coming years.

Drug stores, hospitals and clinics hold the largest demand for pharmaceuticals in Japan while supermarkets and other confectionary stores (permitted to keep general cold and flu medicines) cater to only a small percentage of the market. In Japan, prescription drugs account for the largest share of the market which is close to ~%. Renin-angiotensin system agents and anti-tumor drugs posted highest sales at USD ~ billion (~ billion yen) and USD ~ billion (~ billion yen). Asthma and COPD treatment drugs sales was on seventh place in value terms out of total revenues generated from drugs sales in the country.

At present domestic pharmaceutical companies hold a majority of market share but foreign companies are also rapidly expanding their reach supported by M&A and joint ventures. Pfizer, Roche (Chugai), Novartis and Merck has secured foothold in the Japanese pharmaceutical industry.

Japanese pharmaceutical industry is expected to grow at a slow rate due to government

reforms in healthcare policy aiming to control rising healthcare cost and uneven demand from outside Japan. The Japanese digestive medicines segment is witnessing a continuous fall in shipment by volume and value from last four years (2007-2010). Vitamins, Antiallergic, skincare and Antibiotics will push the OTC drugs demand which currently account for a small share of the overall pharmaceutical industry in Japan. OTC drugs market is expected to grow at CAGR 6.22% from 2011-2016. Industry consolidation is expected to continue, led by falling drug prices and increasing competition from foreign companies.

Key Findings

In the first quarter of 2010, the global advertising expenditures on pharmaceutical products grew 3.60% compared to the same period in 2009.

Pharmacies and drug stores hold 51.30% share in terms of sales of pharmaceuticals followed by hospitals and clinics.

In 2009, pharmaceuticals market in the country grew 8.67% to USD ~ billion. This growth was mainly driven by the treatment of chronic diseases and government healthcare spending.

In 2010, Japanese pharmaceutical industry recorded USD ~ billion revenues and grew by 5.79% in 2011.

The Japanese pharmaceutical industry is expected to grow at a CAGR 2.65% from 2011 to 2016 reaching USD ~ billion.

In 2011, OTC market grew by 4.26% from previous year and its share in total pharmaceutical drugs market reached 6.98% although this percentage was low from 2010 results.

The overall prescription drugs sales is expected to register slow growth reaching USD ~ billion by 2016 at a CAGR 2.39% from 2011-2016.

In Japan, generic drug market is in development stage, presently accounted for only 22.60% (by volume) and 6.75% (by value) of the total drug sales in 2010.

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