

Japan Pharmaceuticals and Healthcare Report Q1 2016

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Abstracts

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BMI View: Japan's developed pharmaceutical market will see heightened levels of competition ahead. As a highly saturated market with all major multinational pharmaceutical firms present, the degree of rivalry will be further catalysed by the increasing generic drug penetration in the country. This puts pressure on long-listed medicines in the country, requiring research-based firms to constantly introduce new patented drugs to sustain growth. Competition within the generic drug sub-sector is also likely to intensify as more foreign-based generic drugmakers enter the market and domestic firms expand.

Headline Expenditure Projections

Pharmaceuticals: JPY11.24trn (USD106.14bn) in 2014 to JPY11.49trn (USD96.96bn) by 2015 with a yo-y growth of 2.2% in local currency terms and -8.6% in USD terms. The contraction in the US dollar amount is due to the strengthening of the dollar against the yen.

Healthcare: JPY50.27bn (USD474.71bn) in 2014 to JPY51.30trn (USD432.89bn) in 2015 with a y-o-y growth of 2.0% in local currency terms and -8.8% in USD terms. Healthcare spending revised downwards due to new data from the World Health Organization. The lower US dollar amount is driven by the weakening of the yen against the dollar.

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