

Japan Pharmaceuticals and Healthcare Report Q2 2016

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Abstracts

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BMI View: Japanese pharmaceutical firms will be forced to adapt their business model to accommodate the changing domestic medicine landscape. With the market share of generic drugs expected to grow in line with government incentives, Japan-based drugmakers will see revenues from long-listed products come under increasing pressure. For research-based firms, innovation will become the key to navigate this business environment which necessitates a focus on core competencies.

Headline Expenditure Projections

Pharmaceuticals: JPY11.5trn (USD94.9bn) in 2015 to JPY11.7trn (USD101.6bn) by 2016 with a y-o-y growth of 2.2% in local currency terms and -7.1% in USD terms.

Healthcare: JPY51.3trn (USD432.8bn) in 2015 to JPY52.3trn (USD439.7bn) in 2016 with a y-o-y growth of 2.0% in local currency terms and 1.6% 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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