

Japan Pharmaceuticals and Healthcare Report Q3 2015

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Abstracts

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BMI View: The Japanese pharmaceutical market will become increasingly challenging for multinational drugmakers. This comes as the use of generic drugs has begun to gain momentum, creating a more competitive environment for innovative medicines. In addition, top line growth for foreign-based multinational drugmakers will be further challenged by the depreciation of the yen, which will remain weak under the country's 'Abenomics' economic initiative.

Headline Expenditure Projections

Pharmaceuticals: JPY11,239bn (USD106bn) in 2014 to JPY11,490bn (USD99bn) by 2015 with a year-on-year growth of 2.2% in local currency terms and -9% in USD terms. The contraction in the US dollar amount is due to the strengthening of the dollar against the yen.

Healthcare: JPY50,395bn (USD476bn) in 2014 to JPY51,535bn (USD433bn) in 2015 with a year-on-year growth of 2.3% in local currency terms and -9% 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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