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Japan Pharmaceuticals and Healthcare Report Q4 2016

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Abstracts

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BMI View: Competition in the Japanese biosimilar market is set to intensify over the coming years. Fundamentals attracting drugmakers into this field include its relatively nascent state, with few biosimilars launched thus far, cost containment pressures and well-defined regulations that will facilitate market entry. We expect branding to be a key differentiator in this medicine class, as it will require pharmaceutical firms to actively engage stakeholders, especially doctors.

Headline Expenditure Projections

Pharmaceuticals: JPY11.5trn (USD94.9bn) in 2015 to JPY11.7trn (USD109.7bn) by 2016 with a y-o-y growth of 2.2% in local currency terms and 15.6% in USD terms. Local currency forecast unchanged from last quarter, though a strengthening of the yen has shifted US dollar values.

Healthcare: JPY50.8trn (USD419.4bn) in 2015 to JPY51.7trn (USD482.9bn) in 2016 with a y-o-y growth of 1.8% in local currency terms and 15.1% in USD terms. The US dollar amount remains volatile and will be contingent on the Bank of Japan's decision to weaken the currency having recently implemented negative interest rates.

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