



Research in Your Backyard: Japan

Contribution of PhRMA and EFPIA Member Companies to Japanese Society & Economy
Through Clinical Trials of Innovative Medicines

August 2016

Deloitte.

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Introduction: Who We Are

We are devoted to advancing public policies that support innovative medical research, yield progress for patients today, and provide hope for the treatments and cures of tomorrow



PhRMA Japan represents U.S. based pharmaceutical companies. Our activities vary from promoting healthcare system reform to providing medical information to patients.

Mission

PhRMA Japan's mission is to promote the health of patients and contribute to the healthier lives of all people



EFPIA Japan represents R&D-based European pharmaceutical companies. We focus on patient needs in Japan, engage in discussions with key stakeholders regarding public health, and work to improve the R&D environment for pharmaceutical companies.

Mission

EFPIA Japan's mission is to enhance the health of Japanese patients by introducing innovative drugs and vaccines

PhRMA and EFPIA member companies

| PhRMA | EFPIA | |
|-------------------------------|-------------------------------------|--|
| AbbVie GK | Actelion Pharmaceuticals Japan Ltd. | Janssen Pharmaceutical K.K. |
| Amgen Astellas BioPharma K.K. | AstraZeneca K.K. | LEO Pharma K.K. |
| Biogen Japan Ltd. | Bayer Yakuhin, Ltd | Lundbeck Japan K. K. |
| Bristol-Myers Squibb K.K. | Bracco-Eisai Co., Ltd. | Merck Serono Co.,Ltd. |
| Celgene K.K. | Chugai Pharmaceutical Co., Ltd. | Mylan EPD G.K. |
| Eli Lilly Japan K.K. | CSL Behring K.K. | Nihon Servier Co.,Ltd. |
| Janssen Pharmaceutical K.K. | Ferring Pharmaceuticals Co., Ltd. | Nippon Boehringer Ingelheim Co ., Ltd. |
| MSD K.K. | Galderma (Japan) K.K. | Novartis Pharma K.K. |
| Mundipharma K.K. | GE Healthcare Japan Corporation | Novo Nordisk Pharma Ltd. |
| Pfizer Japan Inc. | GlaxoSmithKline K.K. | Sanofi K.K. |
| | Guerbet Japan K.K. | Shire Japan K.K. |
| | Ipsen Pharma SAS | UCB Japan Co. Ltd. |

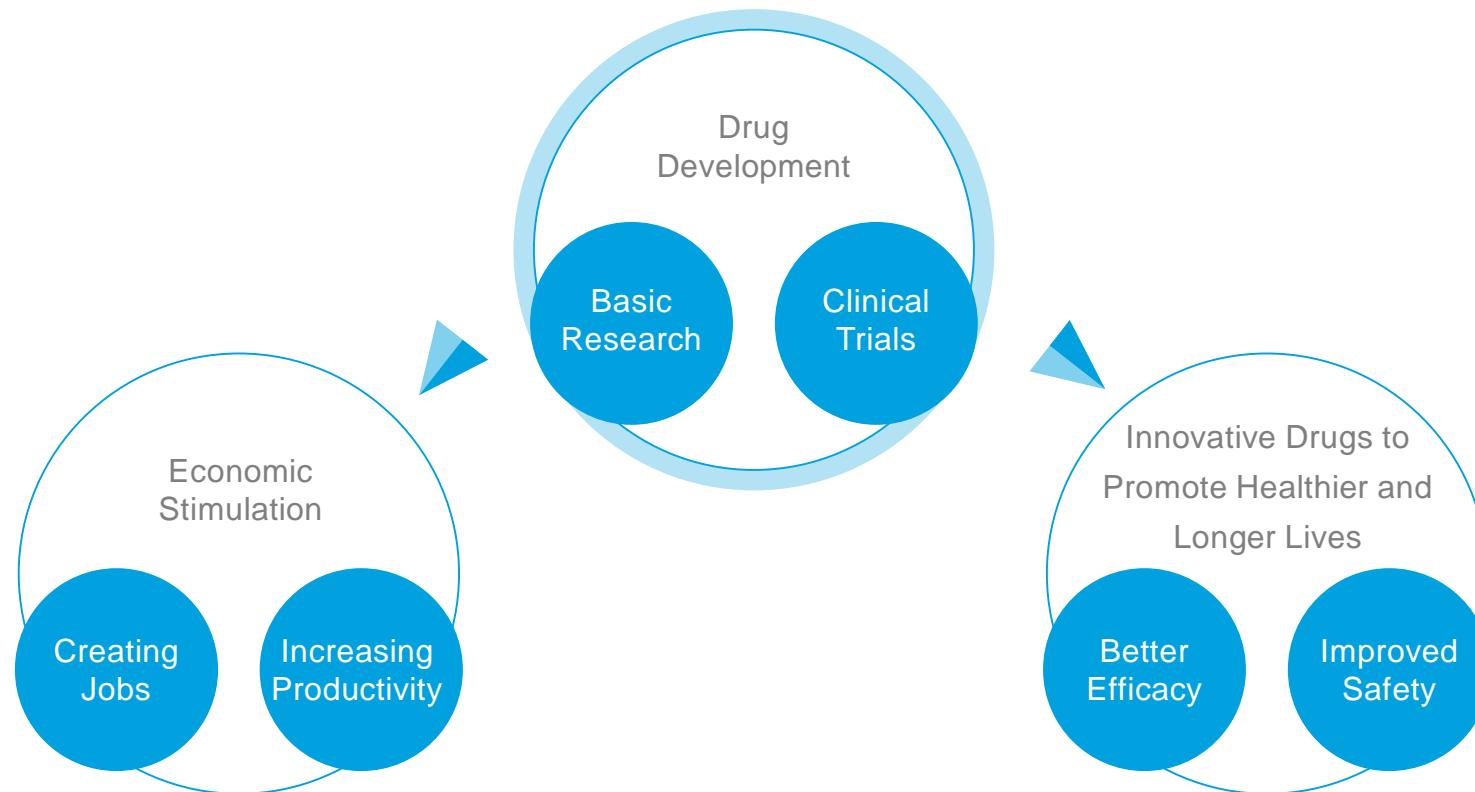


Pharmaceutical Industry and Society

Pharmaceutical companies contribute to society and the economy in multiple ways

Pharmaceutical companies collaborate with local clinics and hospitals to develop new drugs.

This in turn provides economic stimulus and leads to innovative new medicines with better efficacy and safety profiles.

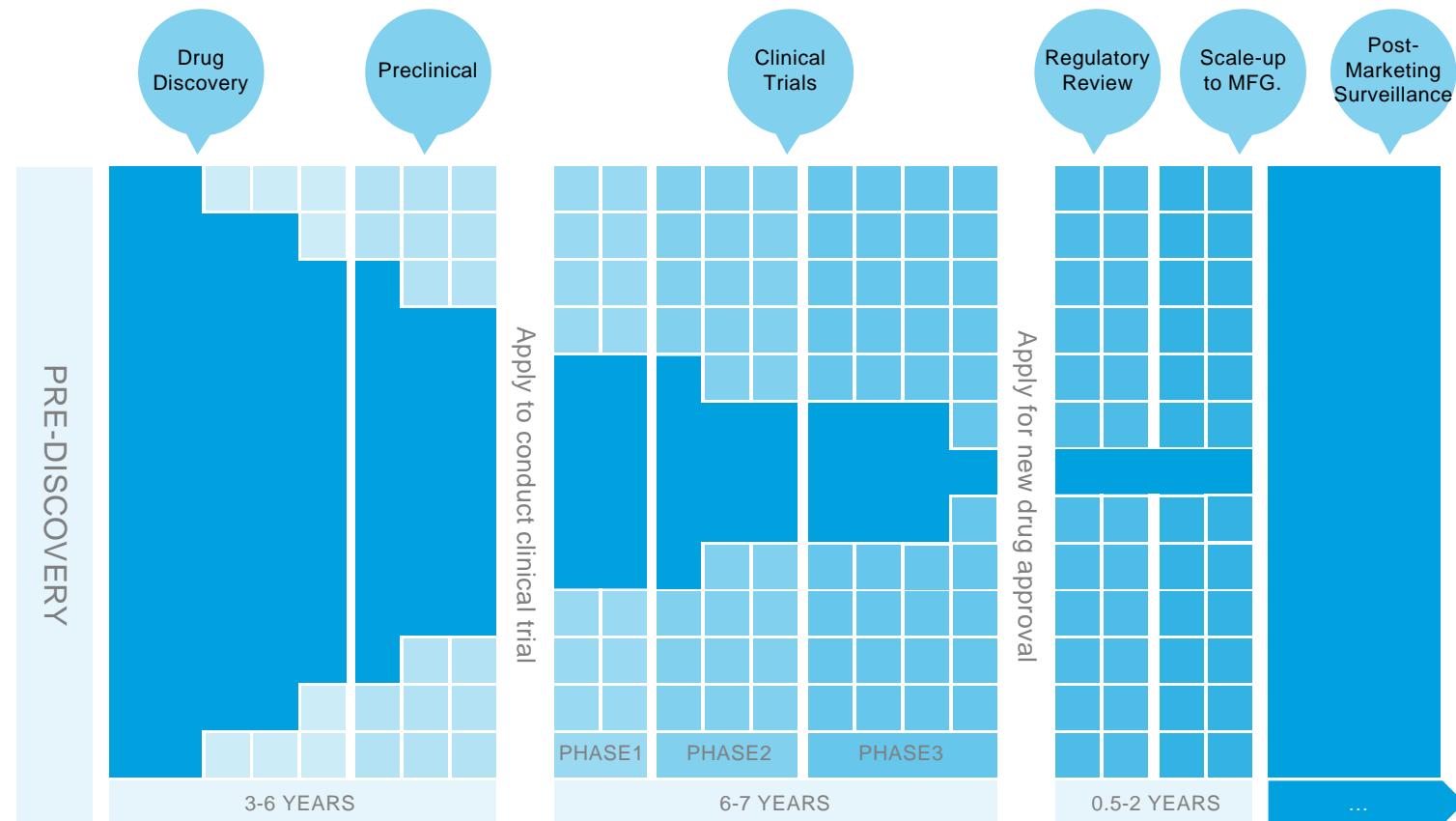




Collaborating on Clinical Trials

Discovering and developing new medicines is a long, complex, and costly process

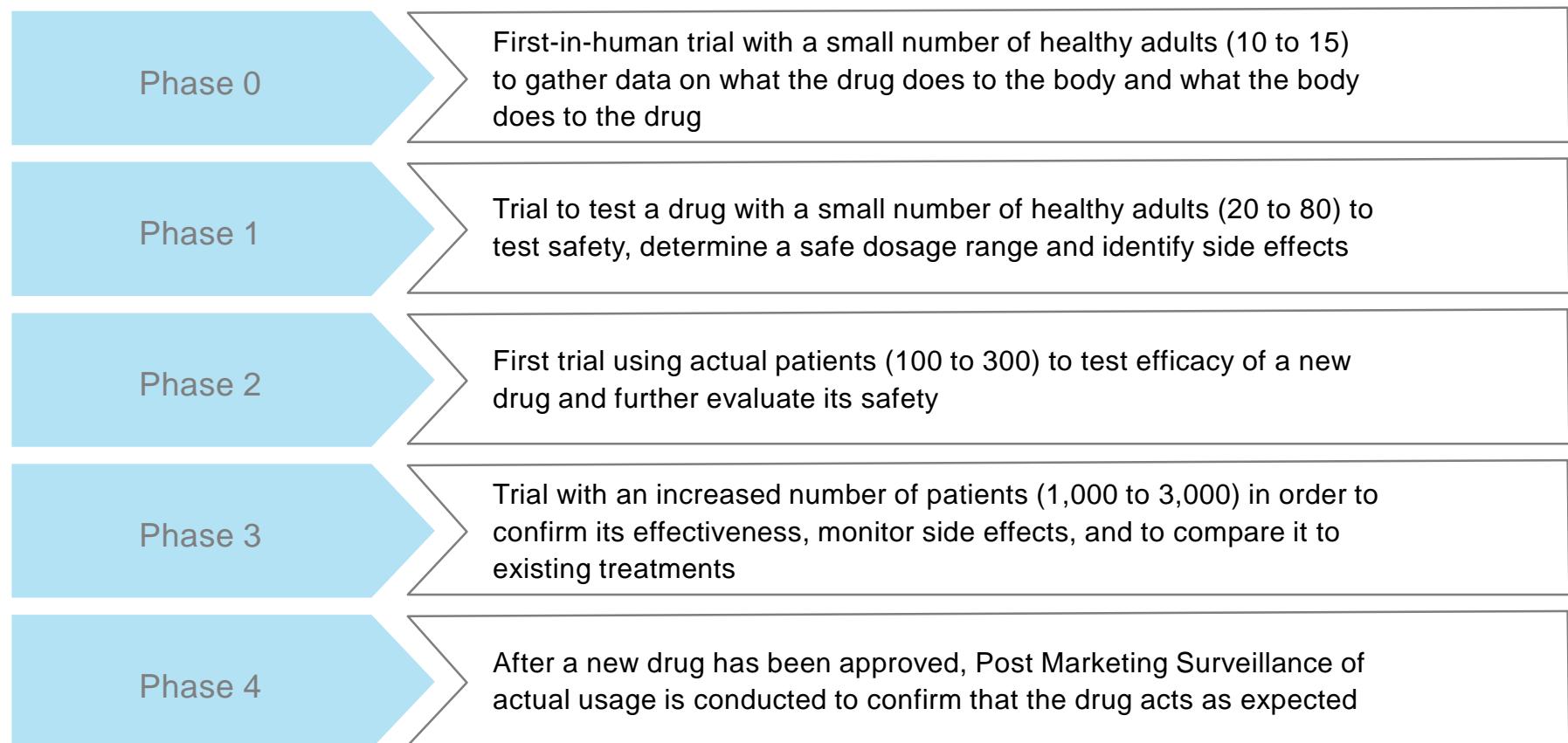
Developing innovative medicines takes an average of 10-15 years and 2.6B USD. Less than 12% of the candidate medicines that make it into phase I clinical trials are approved. Many promising compounds fail after pharmaceutical companies have spent substantial amounts of money on testing and clinical trials



Source: Cost of Developing a New Drug, Tufts Center for the Study of Drug Development, Tufts School of Medicine. November 2014.

What is a Clinical Trial?

Computer simulations and animal testing are not enough to determine the efficacy and safety of new drugs for people. Clinical trials are conducted in five phases with the aim of clarifying the impact of experimental drugs on humans.



Source: PhRMA

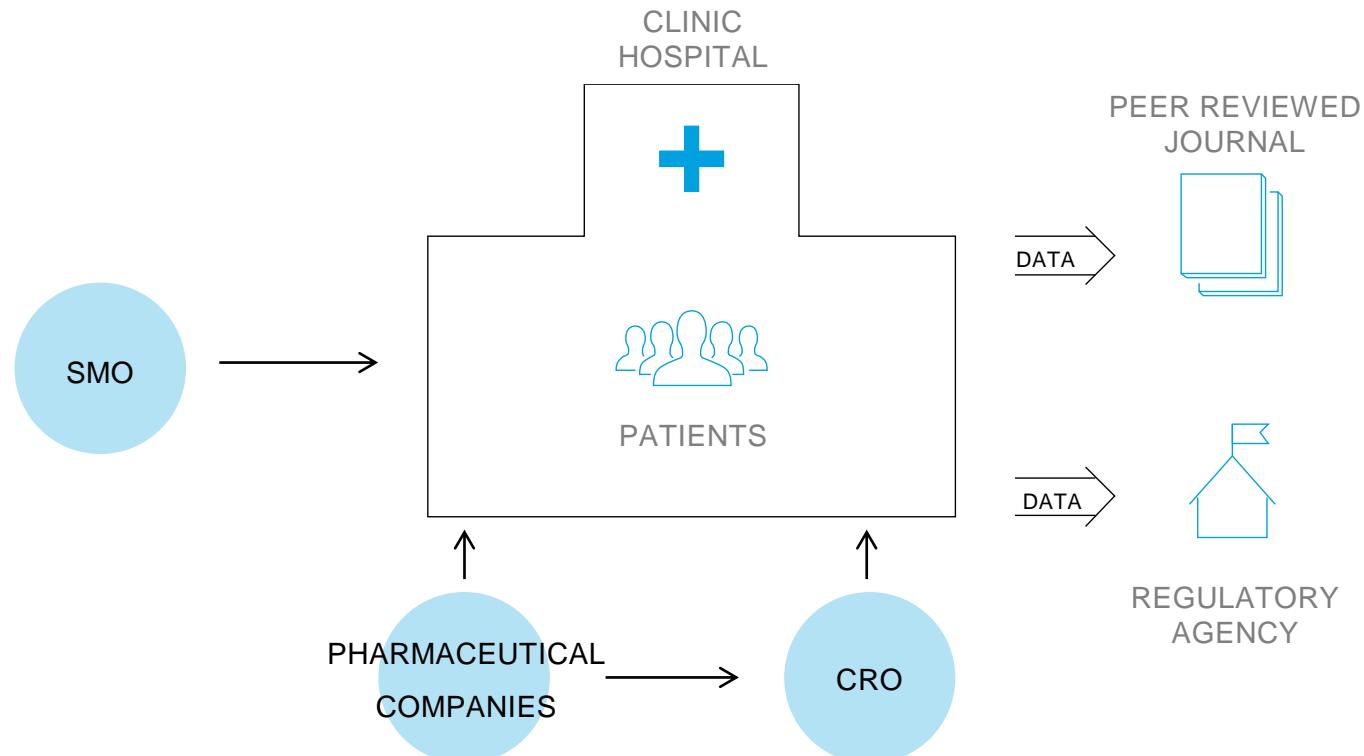
What are Therapeutic Areas?

Therapeutic areas are general categories of illnesses, including the examples below

| Therapeutic Area | Example |
|-----------------------------|--|
| Allergy | Allergic rhinitis, Asthma, Atopic dermatitis, etc. |
| Infectious disease | Influenza, Hepatitis C/B, Herpes, etc. |
| Hematology | Anemia, Hemophilia, etc. |
| Respiratory disease | COPD, Bronchiectasis, etc. |
| Oncology | Gastric cancer, Lung cancer, Breast cancer, etc. |
| Cardiology | Heart failure, Brain ischemia, Hypertension, etc. |
| Gastroenterology | Gastric ulcer, Reflux esophagitis, etc. |
| CNS | Alzheimer's disease, Depression, Epilepsy, etc. |
| Urology | Nocturia, Lupus nephritis, etc. |
| Dermatology | Acne, etc. |
| Ophthalmology | Age-related macular degeneration, Uveitis, etc. |
| Immunology | Rheumatoid arthritis, Crohn's disease, Psoriasis, etc. |
| Musculoskeletal disease | Osteoporosis, Lower back pain, etc. |
| Endocrine metabolic disease | Diabetes mellitus, Hypercholesterolemia, Hyperphosphatemia, etc. |
| Rare disease | Gaucher disease, Myelofibrosis, Behcet's disease, etc. |

Collaborating with Japanese institutions in conducting and supporting clinical trials

Conducting clinical trials involves collaboration between pharmaceutical companies and other institutions in Japan, such as hospitals, local clinics, and contract research organizations (CRO).



| Pharmaceutical Companies | CRO | Hospitals / Clinics | SMO (Site Management Organizations) |
|--------------------------|-----|---------------------|--|
|--------------------------|-----|---------------------|--|

Decide to conduct clinical trials and request support from CRO

Support pharmaceutical companies with the coordination of clinical trials

Conduct trials performed by physicians and trained research professionals

Provide additional support to hospitals and clinics during trials

Partnering with local Japanese medical institutions to conduct clinical trials expands the benefit of clinical trials to the hosting area

Conducting clinical trials for new drug development contributes to local Japanese economies and improves the quality of life for people in Japan

Providing advanced treatment

Medical facilities conducting clinical trials are able to provide advanced medical treatments to their patients in these locales

Contributing to local economy

The spending on clinical trials in Japan goes to hospitals and clinics nationwide and supports local economies

Creating jobs

Related stakeholders (local medical facilities and pharmaceutical companies) employ local staff to support clinical trials

PhRMA and EFPIA member companies conducted 825 clinical trials in 2015
to deliver innovative medicines to patients in Japan

825 (+21% since 2013)

CLINICAL TRIALS*

18,095 (+55% since 2013)

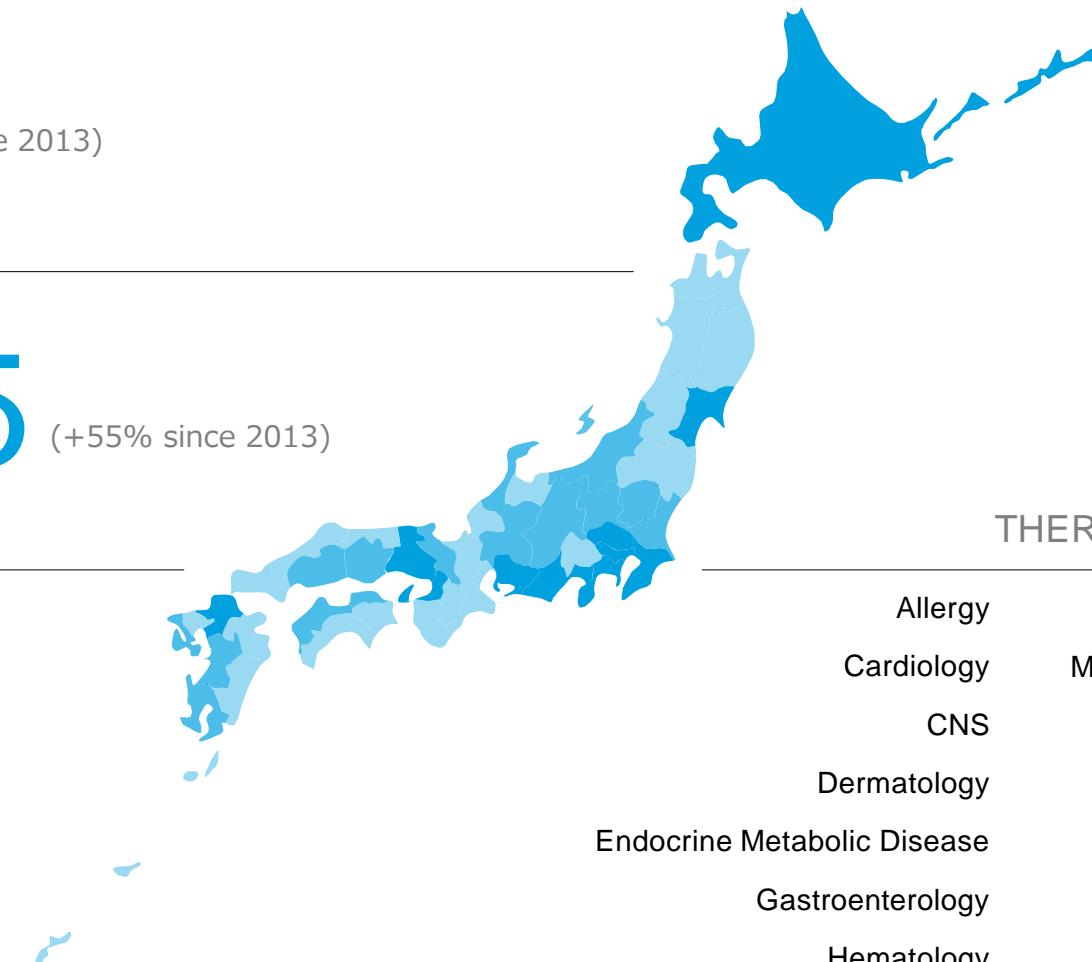
SITES**

of clinical trial conducted

201 ~

101 ~ 200

31 ~ 100



Source: www.clinicaltrials.gov (2015 data)

*Figures do not include post marketing surveillance **Individual sites participating in multiple trials are counted multiple times

16+

THERAPEUTIC AREAS

| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |

PhRMA and EFPIA member companies conduct many clinical trials across all prefectures of Japan

Prefecture not specified 147

| | |
|-----------|-----|
| Tottori | 43 |
| Shimane | 56 |
| Okayama | 188 |
| Hiroshima | 183 |
| Yamaguchi | 100 |

Chugoku

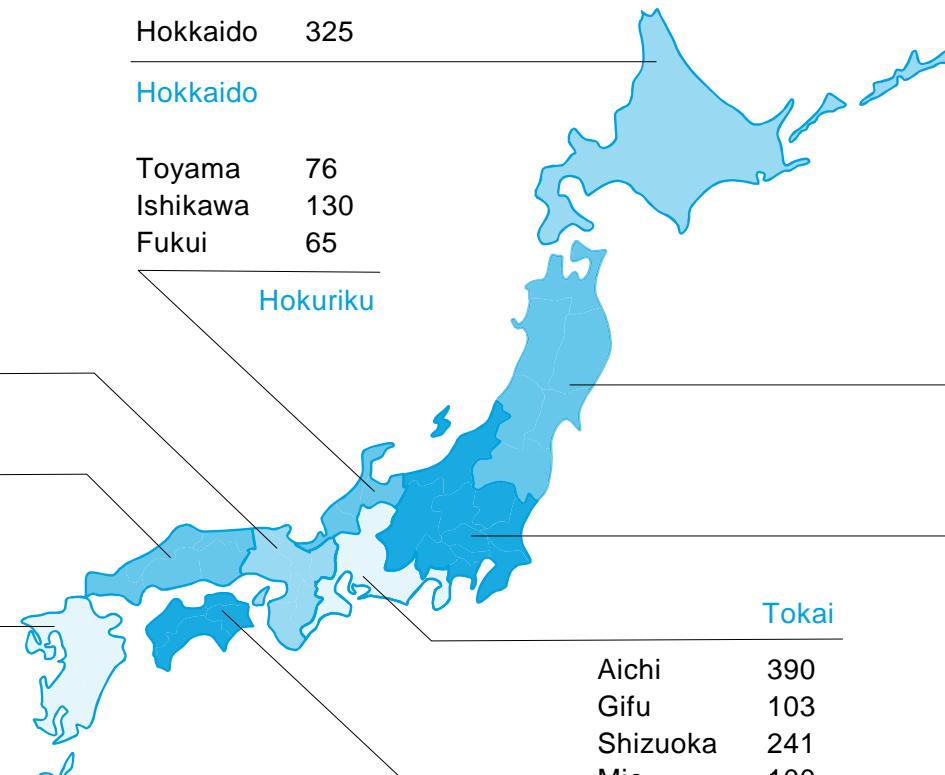
| | |
|-----------|-----|
| Fukuoka | 415 |
| Saga | 75 |
| Nagasaki | 112 |
| Kumamoto | 166 |
| Oita | 93 |
| Miyazaki | 59 |
| Kagoshima | 128 |
| Okinawa | 86 |

Hokkaido 325

Hokkaido

| | |
|----------|-----|
| Osaka | 438 |
| Hyogo | 324 |
| Kyoto | 191 |
| Shiga | 61 |
| Nara | 67 |
| Wakayama | 66 |

Kinki



| | |
|-----------|-----|
| Tokushima | 79 |
| Kagawa | 107 |
| Ehime | 174 |
| Kochi | 78 |

| | |
|-----------|-----|
| Aomori | 67 |
| Iwate | 93 |
| Miyagi | 215 |
| Akita | 57 |
| Yamagata | 53 |
| Fukushima | 86 |

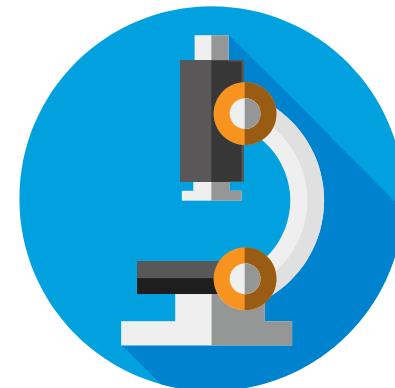
Tohoku

| | |
|-----------|-----|
| Tokyo | 611 |
| Kanagawa | 359 |
| Saitama | 237 |
| Chiba | 346 |
| Ibaraki | 173 |
| Tochigi | 119 |
| Gunma | 148 |
| Yamanashi | 58 |
| Nagano | 123 |
| Niigata | 124 |

Kanto Koshinetsu

Source: www.clinicaltrials.gov (2015 data)



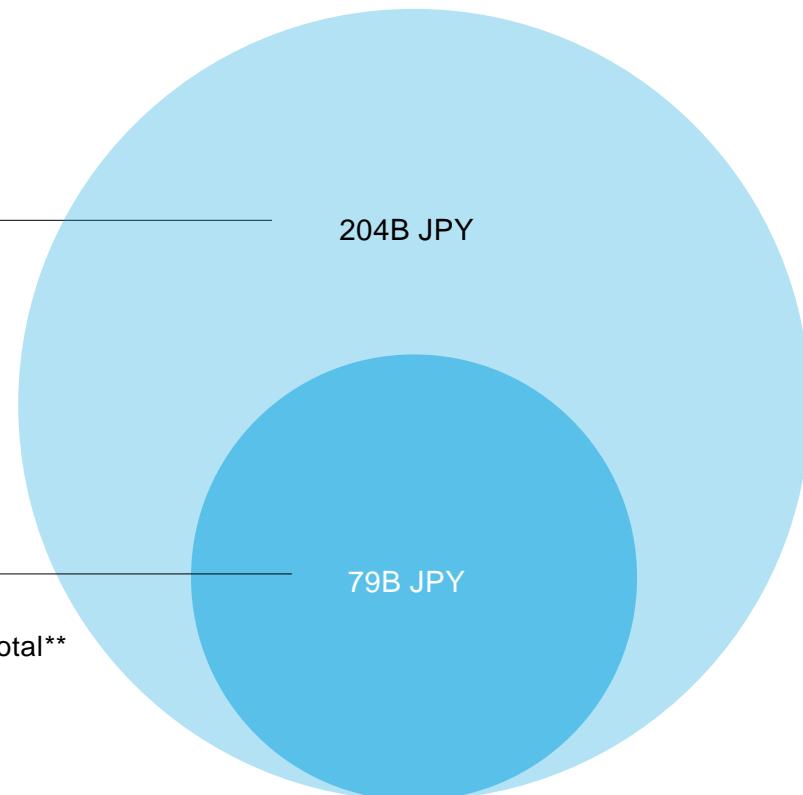


R&D Spending, Trends, and Results

PhRMA and EFPIA member companies contribute a significant share
of the research and development spending in Japan

2014 Clinical Trial Related
Spending in Japan Total*

2014 Clinical Trial Related
Spending in Japan: PhRMA and EFPIA Subtotal**



Source: JPMA data based on company disclosures for fiscal year 2014

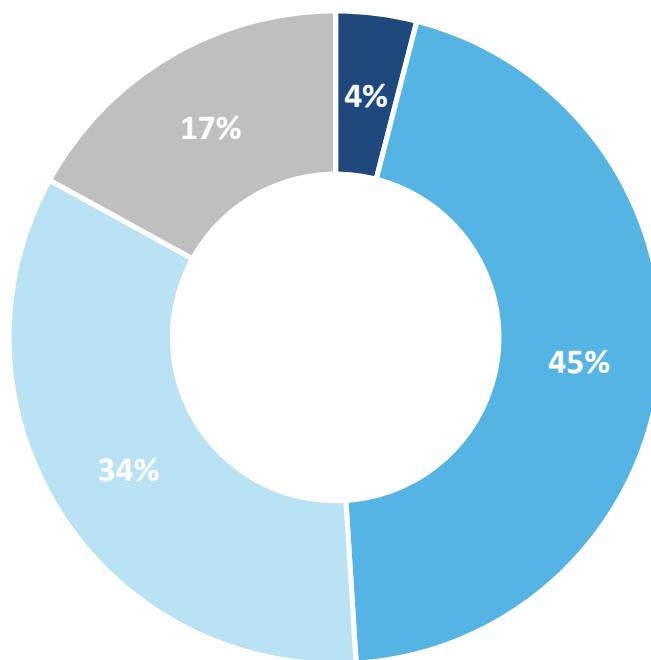
* 72 JPMA companies ** 19 PhRMA and EFPIA member companies participating in JPMA

Note: The figures refer only to clinical research related spending during fiscal year 2014 disclosed by JPMA member companies



Reducing the “drug lag”*

PhRMA and EFPIA member companies are planning simultaneous international drug submissions** which will allow Japanese patients to be in the first wave of access to innovative medicines



Simultaneous international submissions planned by PhRMA / EFPIA member companies

- Completed simultaneous international submissions
- Planned simultaneous international submissions
- Simultaneous international submissions is under consideration
- Simultaneous international submissions is not planned

Source: PhRMA and EFPIA Japan joint research of 28 member companies (clinical trials conducted between April 2015 and March 2016)

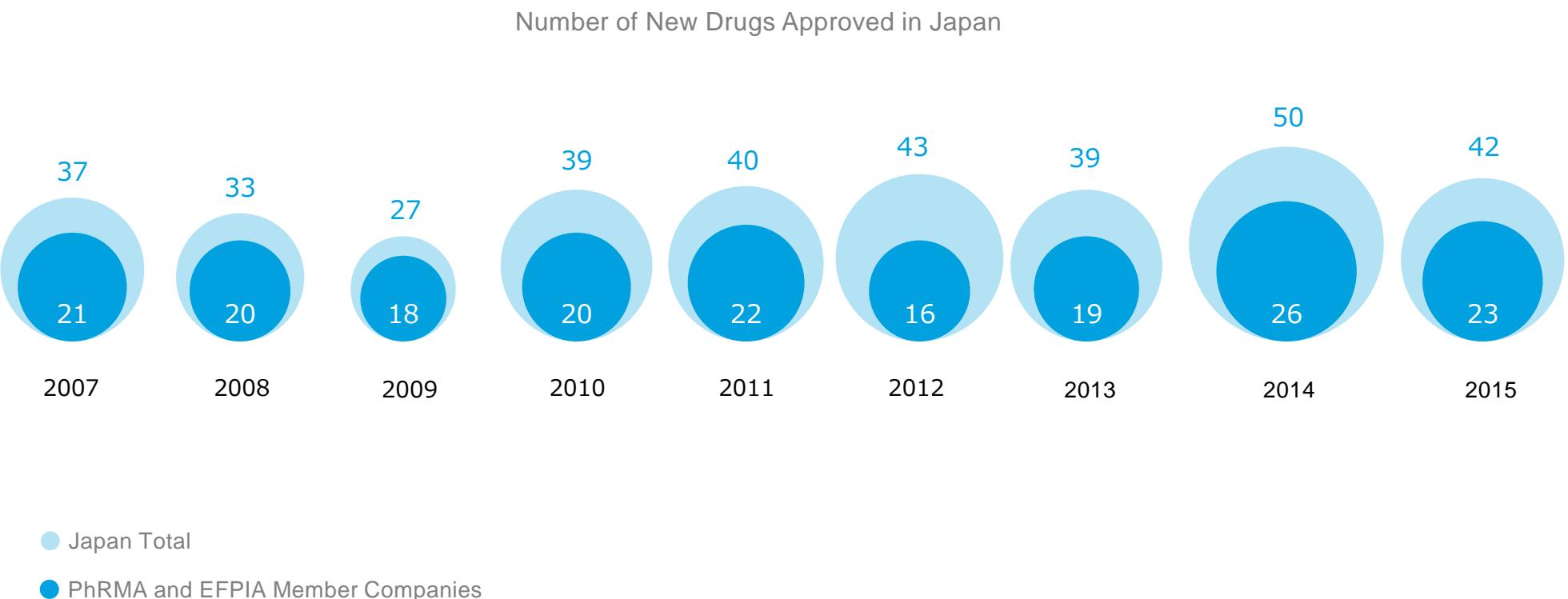
“Drug lag” refers to the delay to approve a new drug in Japan such as cases where approval is delayed compared to other countries, such as the U.S. and Europe

Conducting more global simultaneous clinical trials shortens the drug lag

**Simultaneous international submission refers to the submission of a new drug application (NDA) at the similar timing (within 3 months, in this study) as other countries, such as the U.S. and Europe

Bringing innovation to Japanese patients

PhRMA and EFPIA member companies obtained approval
for 185 new drugs* in Japan over the last 9 years



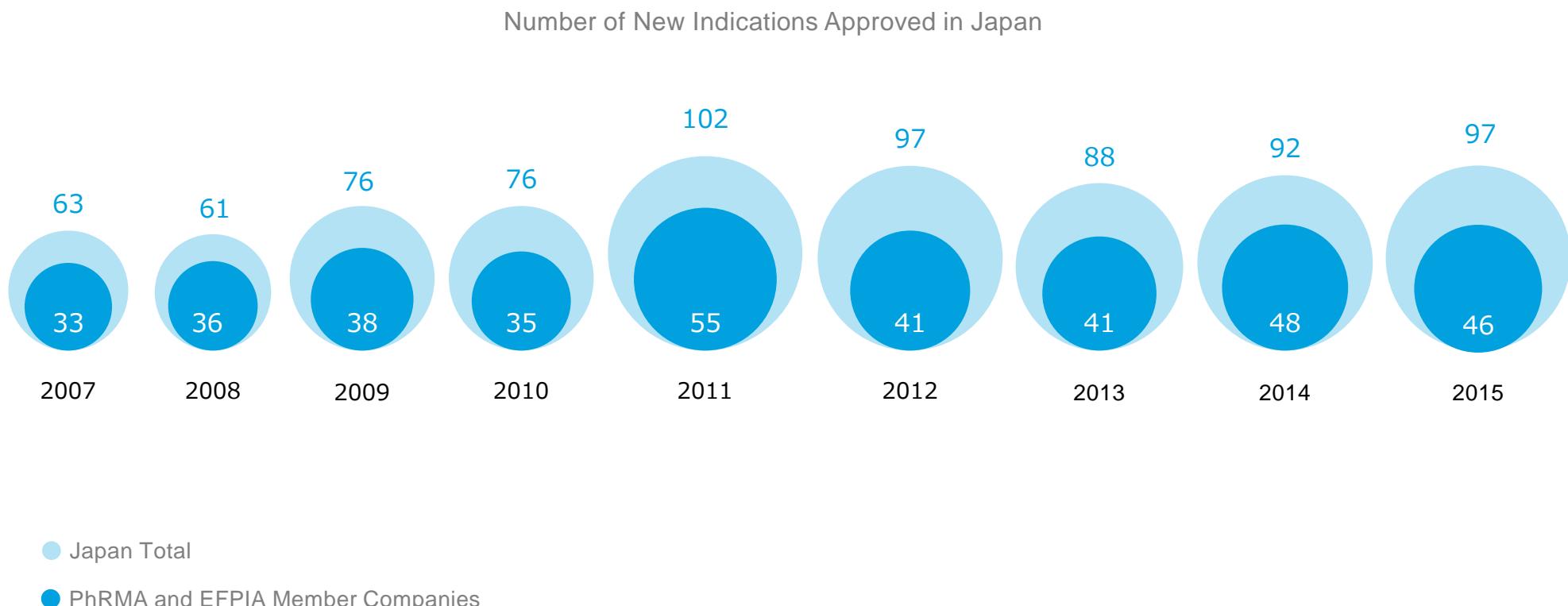
Source: PMDA website

*New drugs refer to New Molecular Entities only approved between April 2007 and March 2016 (Other approvals, such as new indications, are excluded)
Besides the approvals obtained by PhRMA and EFPIA member companies, other approvals include products licensed from global companies



Continuing investment in Japan to treat more conditions

PhRMA and EFPIA member companies obtained approval for 373 new indications* in Japan over the last 9 years



Source: PMDA website

*New indications refer to New Molecular Entities approved between April 2007 and March 2016, as well as new indications approved for existing drugs. Besides the approvals obtained by PhRMA and EFPIA member companies, other approvals include products licensed from global companies

Summary: For Japanese society and patients

We are devoted to advancing public policies that support innovative medical research, yield progress for patients today, and provide hope for the treatments and cures of tomorrow



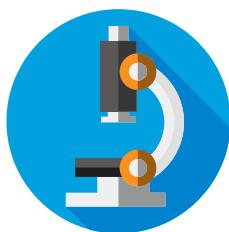
PhRMA and EFPIA member companies' clinical research stimulates local economies through:

- *Collaboration with local Japanese clinics and hospitals to develop new drugs*
- *Funding clinical trials to develop innovative new medicines with better efficacy and safety profiles*



PhRMA and EFPIA member companies invest heavily in clinical trials across all prefectures Japan:

- *825 (+21% since 2013) clinical trials across more than 16 therapeutic areas conducted in 2015*
- *Rapid increase in clinical trials is the result of the premium for new drug development, introduced by the Ministry of Health, Labour and Welfare in 2010*



PhRMA and EFPIA member companies make continuous efforts and investment in Japan to allow Japanese patients to be in the first wave of access to innovative medicines:

- *Spent 79B JPY in the research and development in Japan in 2014*
- *Contribute around half of the new drug approvals in Japan*



To download an electronic version of this presentation,
please go to www.efpia.jp or www.phrma-jp.org, or scan the QR code above

Appendix - Research Activity Map



Prefecture Views

Japan

825

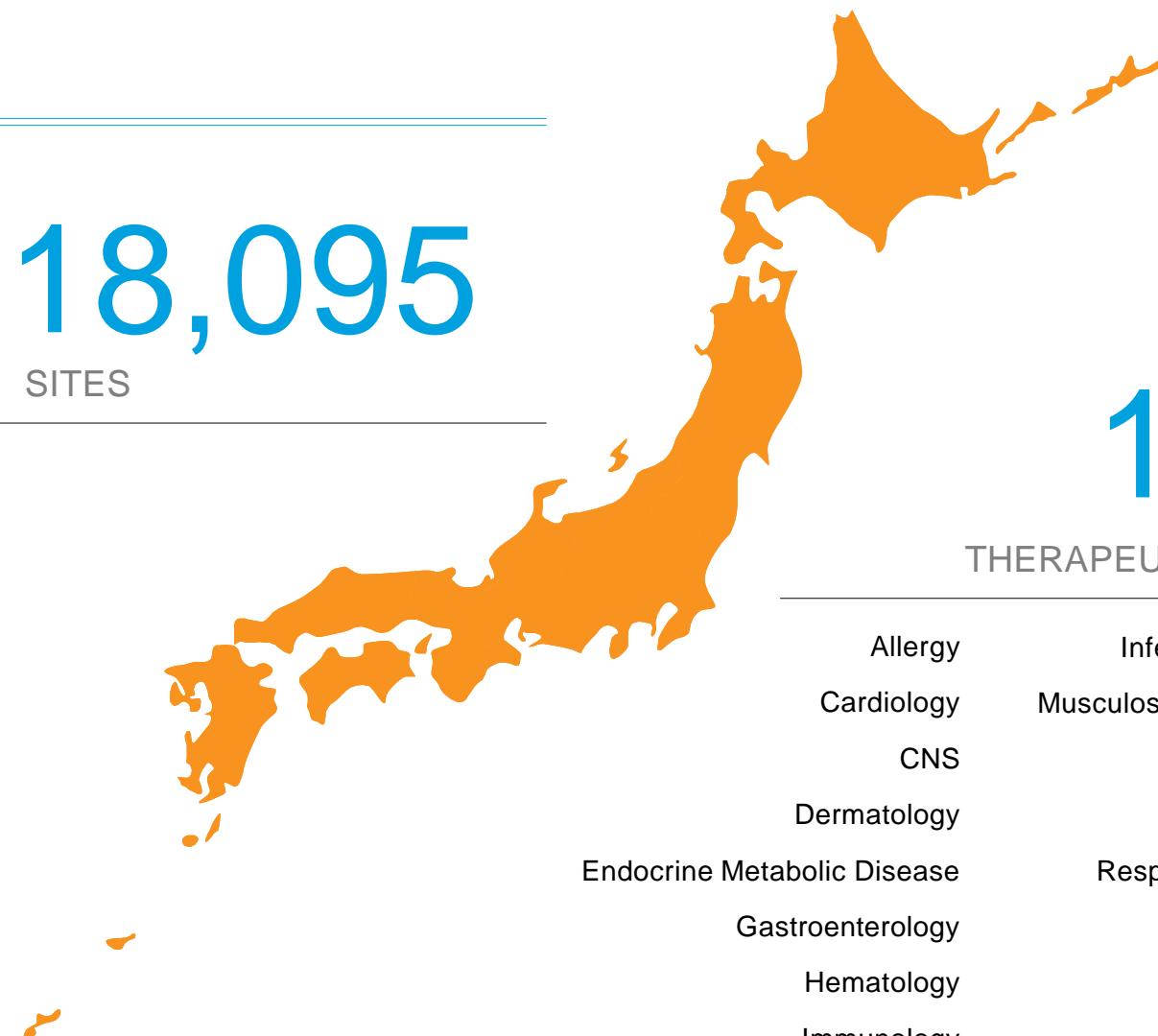
CLINICAL TRIALS

18,095

SITES

16+

THERAPEUTIC AREAS



| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |

Aichi

390

CLINICAL TRIALS

973

SITES

15

THERAPEUTIC AREAS

| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |



Akita

57

CLINICAL TRIALS

116

SITES

13

THERAPEUTIC AREAS

Allergy

Infectious Disease

Cardiology

Musculoskeletal Disease

CNS

Oncology

Dermatology

Ophthalmology

Endocrine Metabolic Disease

Respiratory Disease

Gastroenterology

Urology

Hematology

Rare Diseases

Immunology

Others

Aomori

67

CLINICAL TRIALS

132

SITES

11

THERAPEUTIC AREAS

Allergy

Infectious Disease

Cardiology

Musculoskeletal Disease

CNS

Oncology

Dermatology

Ophthalmology

Endocrine Metabolic Disease

Respiratory Disease

Gastroenterology

Urology

Hematology

Rare Diseases

Immunology

Others

Chiba

346

CLINICAL TRIALS

687

SITES

16+

THERAPEUTIC AREAS

| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |



Ehime

174

CLINICAL TRIALS

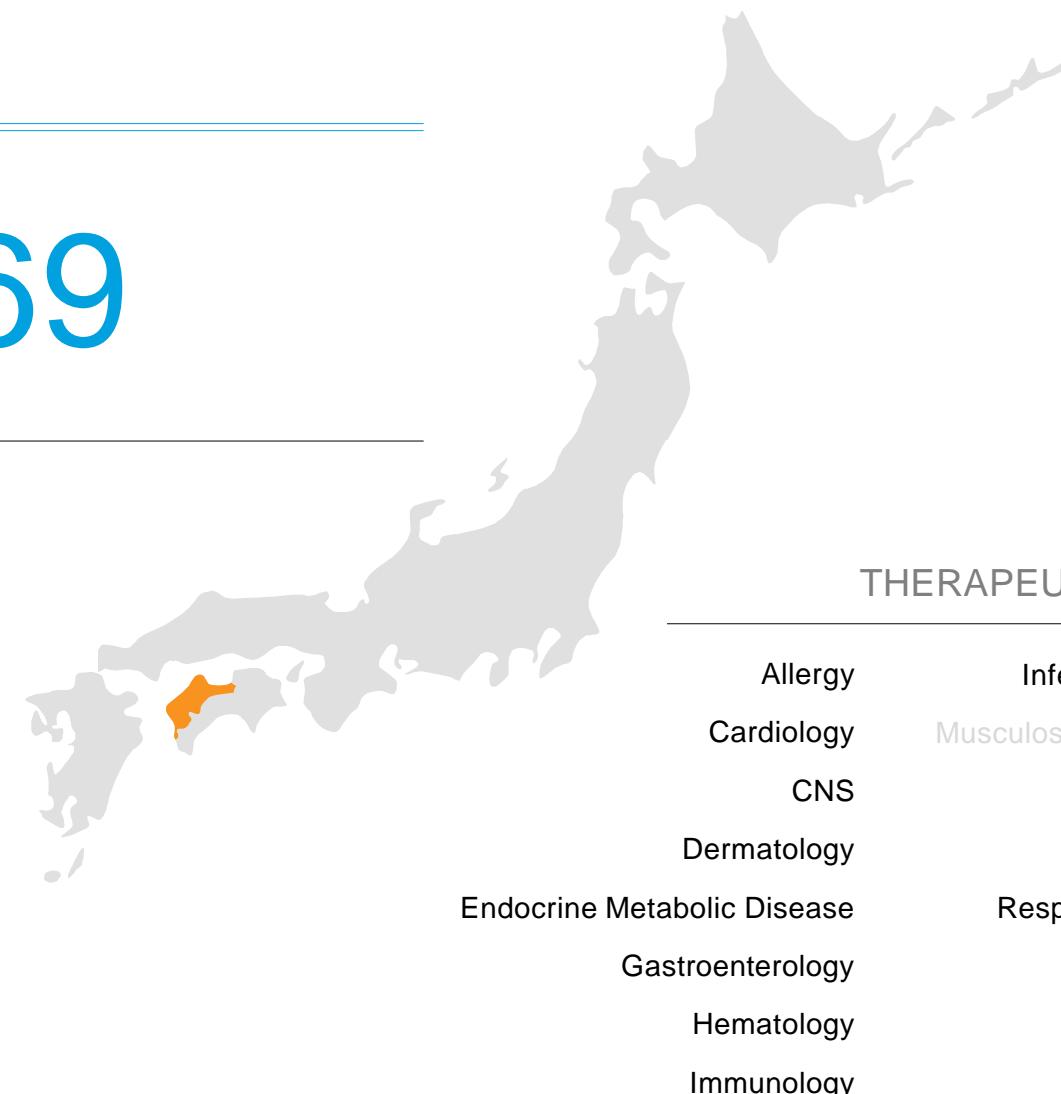
269

SITES

14

THERAPEUTIC AREAS

| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |



Fukui

65

CLINICAL TRIALS

115

SITES

14+

THERAPEUTIC AREAS

| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |



Fukuoka

415

CLINICAL TRIALS

1,110

SITES

16+

THERAPEUTIC AREAS

| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |



Fukushima

86

CLINICAL TRIALS

204

SITES

14

THERAPEUTIC AREAS

| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |



Gifu

103

CLINICAL TRIALS

215

SITES

15+

THERAPEUTIC AREAS

| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |



Gunma

148

CLINICAL TRIALS

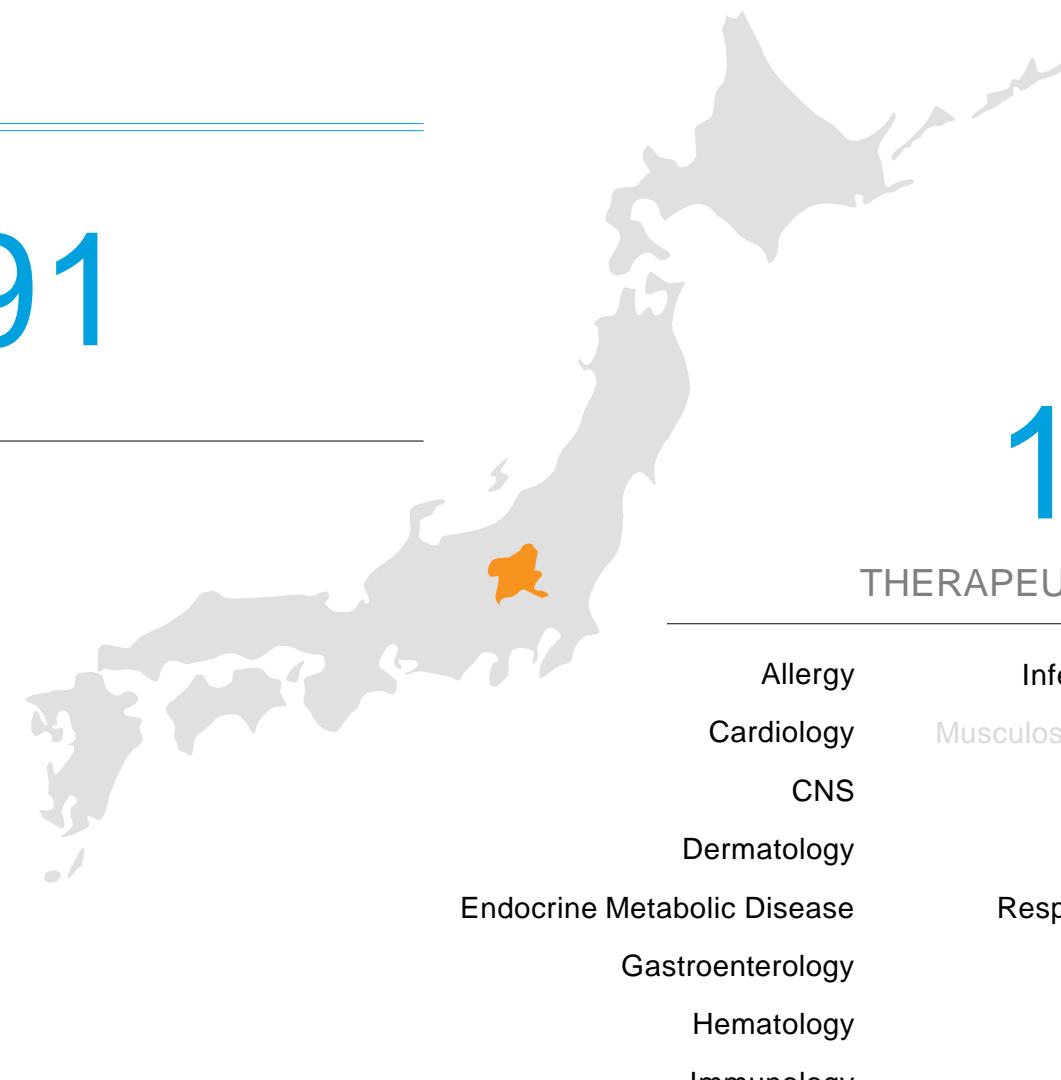
291

SITES

15+

THERAPEUTIC AREAS

| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |



Hiroshima

183

CLINICAL TRIALS

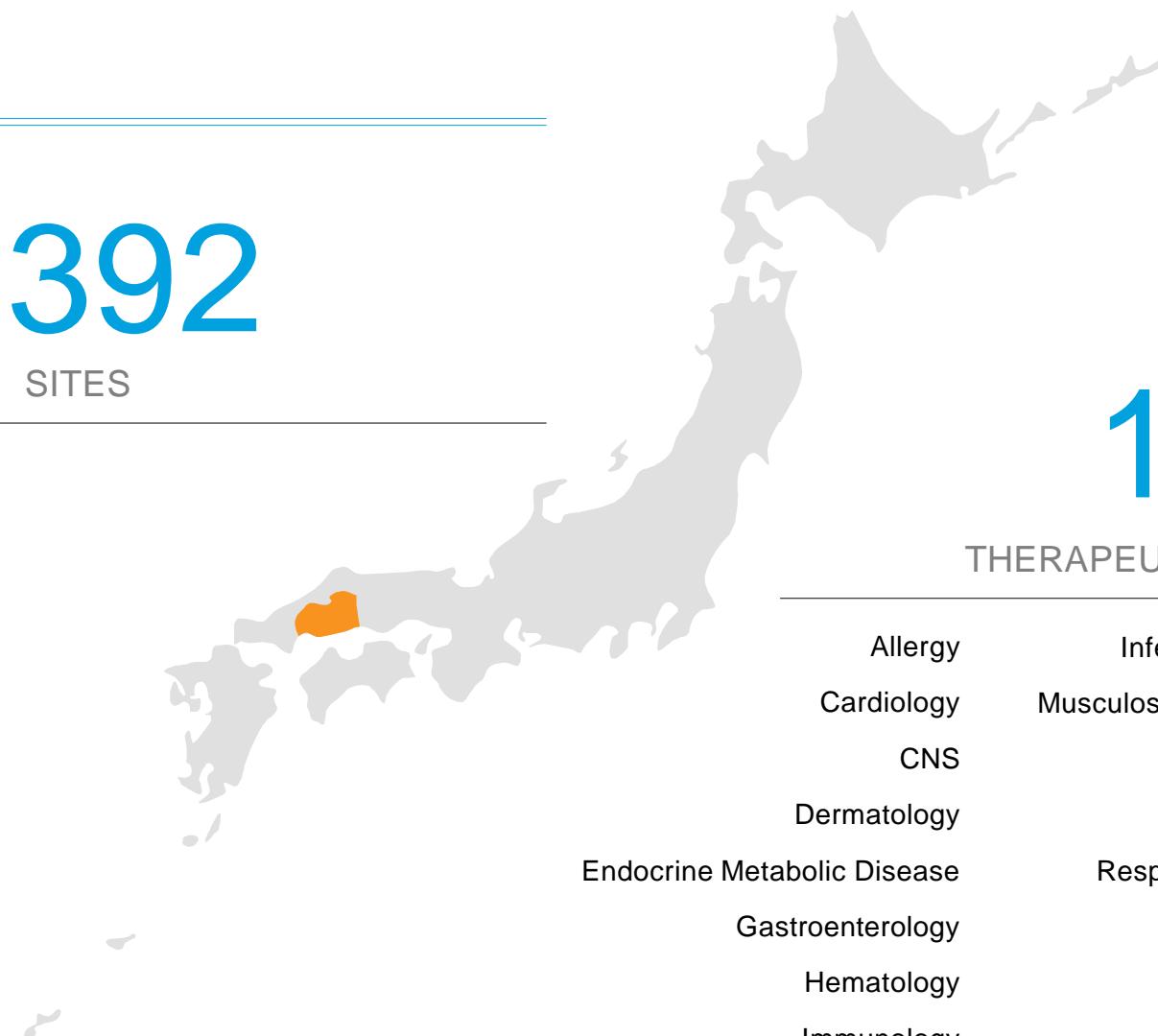
392

SITES

16+

THERAPEUTIC AREAS

| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |



Hokkaido

325

CLINICAL TRIALS

912

SITES

16+

THERAPEUTIC AREAS

| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |



Hyogo

324

CLINICAL TRIALS

765

SITES

16+

THERAPEUTIC AREAS

| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |



Ibaraki

173

CLINICAL TRIALS

389

SITES

16+

THERAPEUTIC AREAS

| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |



Ishikawa

130

CLINICAL TRIALS

228

SITES

16+

THERAPEUTIC AREAS

| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |



Iwate

93

CLINICAL TRIALS

159

SITES

15+

THERAPEUTIC AREAS

| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |



Kagawa

107

CLINICAL TRIALS

194

SITES

14

THERAPEUTIC AREAS

| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |



Kagoshima

128

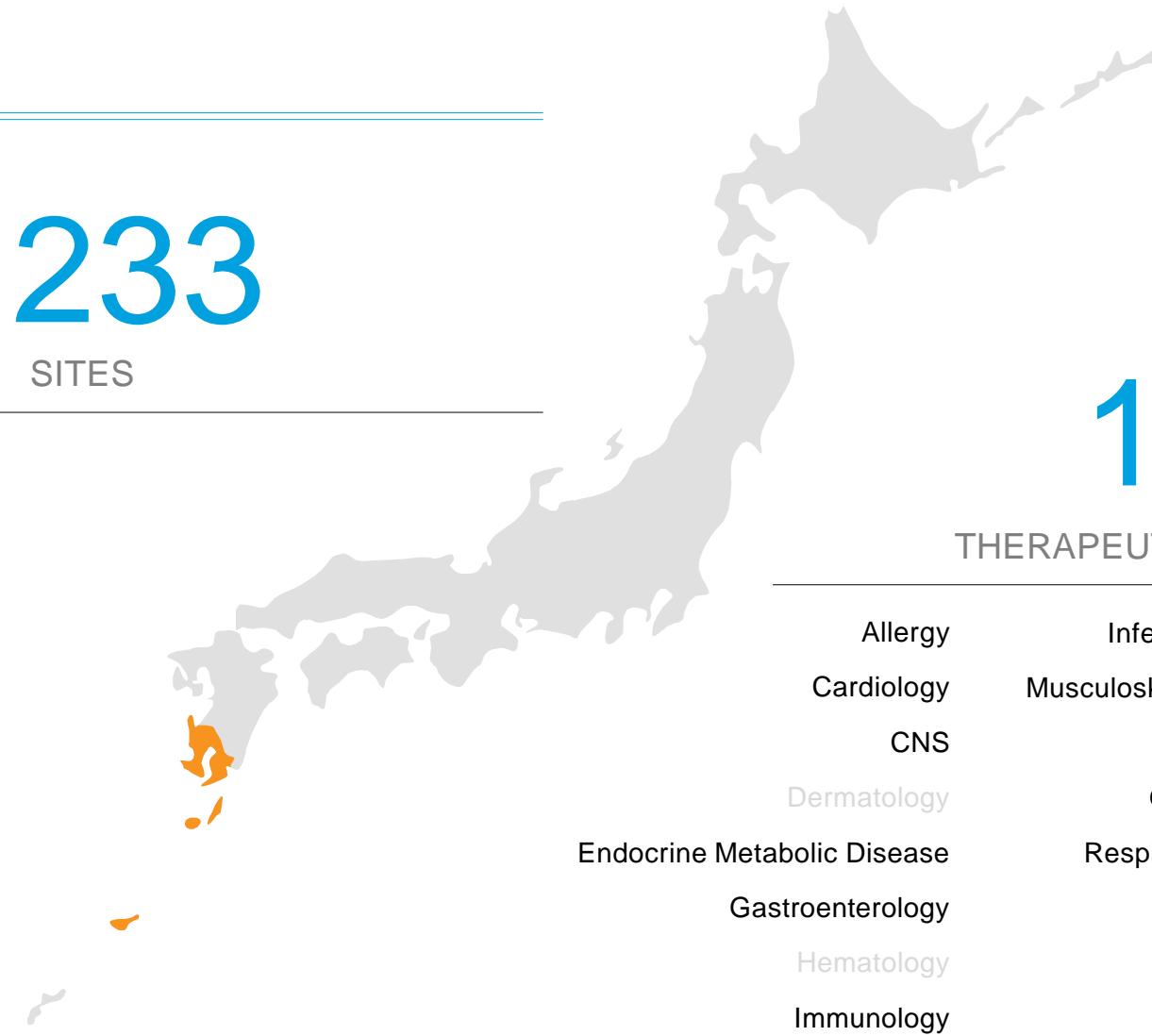
CLINICAL TRIALS

233

SITES

14+

THERAPEUTIC AREAS



Allergy

Infectious Disease

Cardiology

Musculoskeletal Disease

CNS

Oncology

Dermatology

Ophthalmology

Endocrine Metabolic Disease

Respiratory Disease

Gastroenterology

Urology

Hematology

Rare Diseases

Immunology

Others

Kanagawa

359

CLINICAL TRIALS

1,013

SITES

16+

THERAPEUTIC AREAS

| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |

Kochi

78

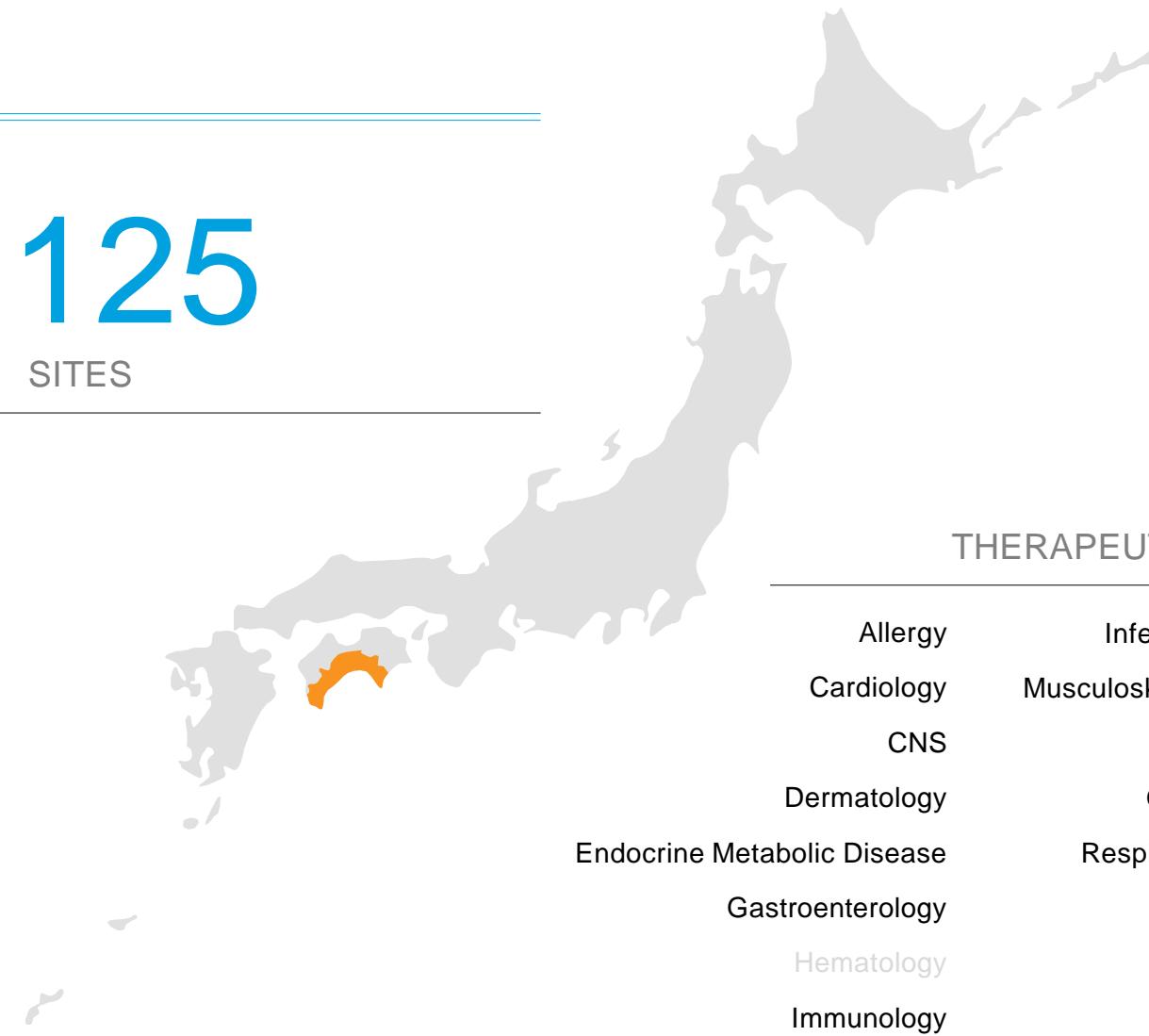
CLINICAL TRIALS

125

SITES

13

THERAPEUTIC AREAS



Kumamoto

166

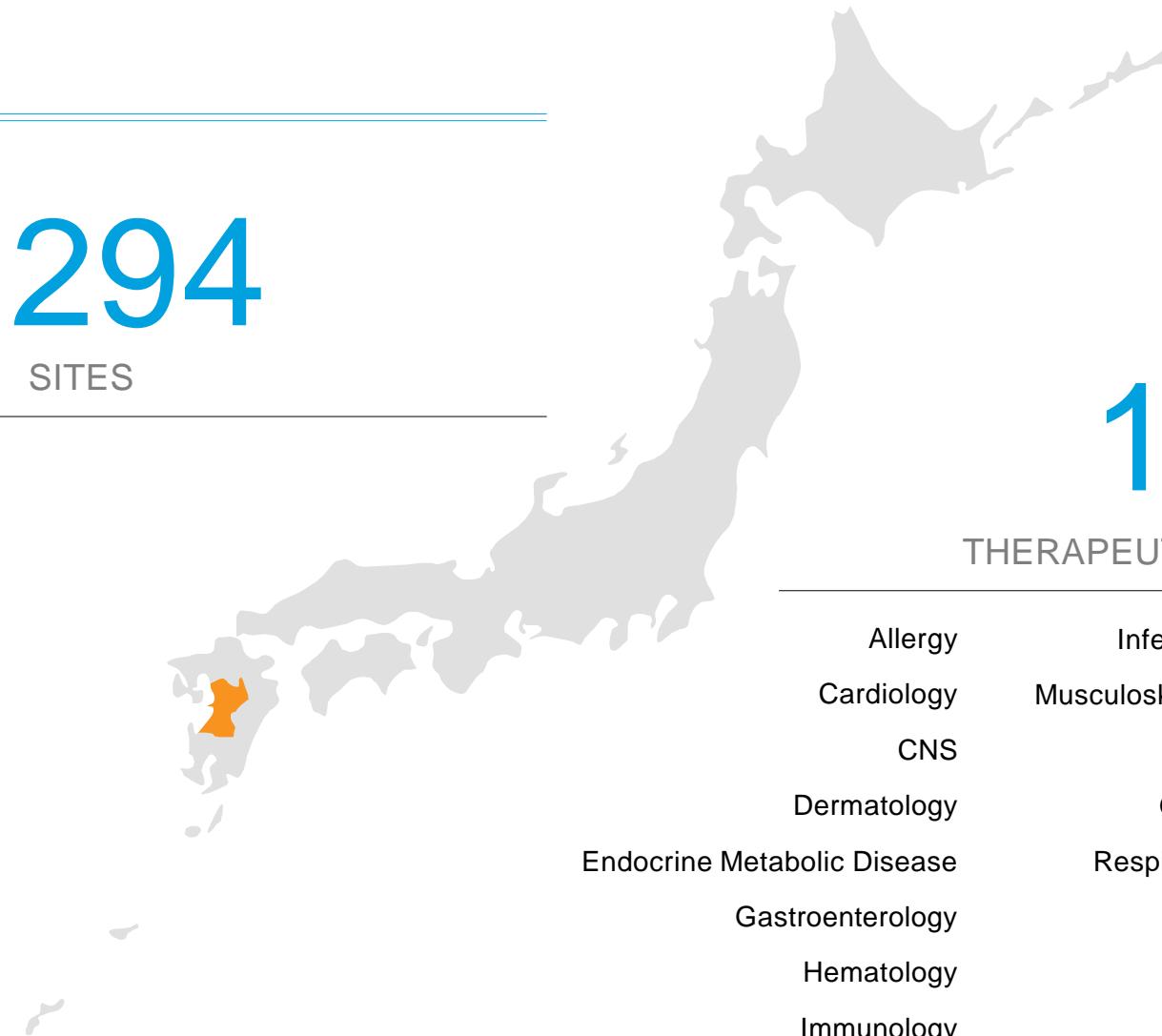
CLINICAL TRIALS

294

SITES

16+

THERAPEUTIC AREAS



| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |

Kyoto

191

CLINICAL TRIALS

415

SITES

16+

THERAPEUTIC AREAS

| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |



Mie

100

CLINICAL TRIALS

202

SITES

15+

THERAPEUTIC AREAS

| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |



Miyagi

215

CLINICAL TRIALS

394

SITES

16+

THERAPEUTIC AREAS

| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |



Miyazaki

59

CLINICAL TRIALS

108

SITES

14

THERAPEUTIC AREAS



| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |

Nagano

123

CLINICAL TRIALS

260

SITES

16+

THERAPEUTIC AREAS

| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |



Nagasaki

112

CLINICAL TRIALS

227

SITES

14

THERAPEUTIC AREAS

| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |



Nara

67

CLINICAL TRIALS

131

SITES

13

THERAPEUTIC AREAS

Allergy

Infectious Disease

Cardiology

Musculoskeletal Disease

CNS

Oncology

Dermatology

Ophthalmology

Endocrine Metabolic Disease

Respiratory Disease

Gastroenterology

Urology

Hematology

Rare Diseases

Immunology

Others

Niigata

124

CLINICAL TRIALS

218

SITES

13

THERAPEUTIC AREAS

| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |



Oita

93

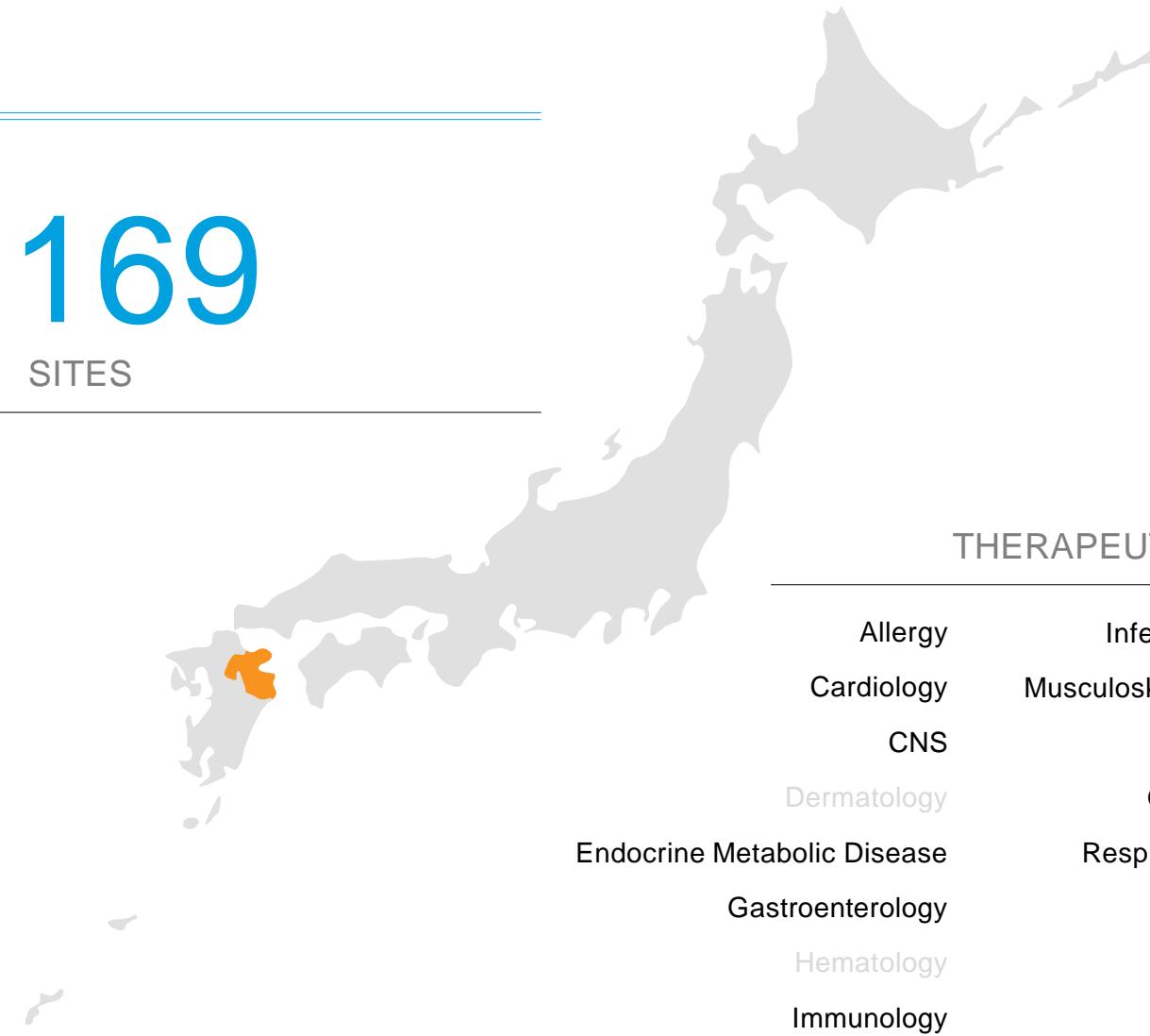
CLINICAL TRIALS

169

SITES

13

THERAPEUTIC AREAS



Okayama

188

CLINICAL TRIALS

320

SITES

15+

THERAPEUTIC AREAS

| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |



Okinawa

86

CLINICAL TRIALS

146

SITES

11

THERAPEUTIC AREAS

Allergy

Infectious Disease

Cardiology

Musculoskeletal Disease

CNS

Oncology

Dermatology

Ophthalmology

Endocrine Metabolic Disease

Respiratory Disease

Gastroenterology

Urology

Hematology

Rare Diseases

Immunology

Others



Osaka

438

CLINICAL TRIALS

1,484

SITES

16+

THERAPEUTIC AREAS

| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |



Saga

75

CLINICAL TRIALS

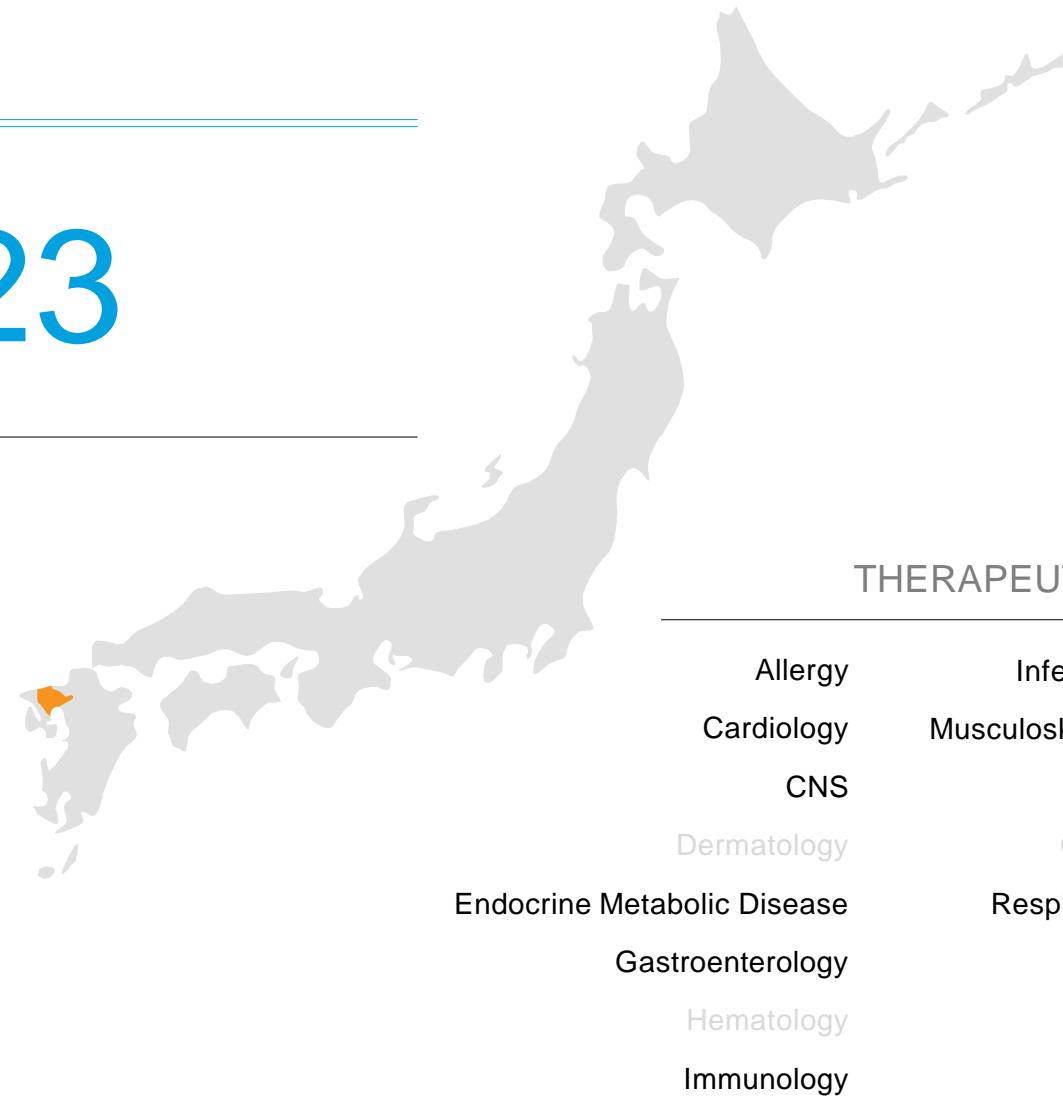
123

SITES

11

THERAPEUTIC AREAS

| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |



Saitama

237

CLINICAL TRIALS

652

SITES

16+

THERAPEUTIC AREAS

| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |



Shiga

61

CLINICAL TRIALS

121

SITES

13

THERAPEUTIC AREAS

Allergy

Infectious Disease

Cardiology

Musculoskeletal Disease

CNS

Oncology

Dermatology

Ophthalmology

Endocrine Metabolic Disease

Respiratory Disease

Gastroenterology

Urology

Hematology

Rare Diseases

Immunology

Others

Shimane

56

CLINICAL TRIALS

89

SITES

13

THERAPEUTIC AREAS

Allergy

Cardiology

CNS

Dermatology

Endocrine Metabolic Disease

Gastroenterology

Hematology

Immunology

Infectious Disease

Musculoskeletal Disease

Oncology

Ophthalmology

Respiratory Disease

Urology

Rare Diseases

Others



Shizuoka

241

CLINICAL TRIALS

490

SITES

16+

THERAPEUTIC AREAS



Tochigi

119

CLINICAL TRIALS

213

SITES

14

THERAPEUTIC AREAS

| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |



Tokushima

79

CLINICAL TRIALS

128

SITES

14

THERAPEUTIC AREAS



| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |

Tokyo

611

CLINICAL TRIALS

2,418

SITES

16+

THERAPEUTIC AREAS

| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |



Tottori

43

CLINICAL TRIALS

73

SITES

13+

THERAPEUTIC AREAS

Allergy

Infectious Disease

Cardiology

Musculoskeletal Disease

CNS

Oncology

Dermatology

Ophthalmology

Endocrine Metabolic Disease

Respiratory Disease

Gastroenterology

Urology

Hematology

Rare Diseases

Immunology

Others

Toyama

76

CLINICAL TRIALS

149

SITES

13

THERAPEUTIC AREAS

Allergy

Infectious Disease

Cardiology

Musculoskeletal Disease

CNS

Oncology

Dermatology

Ophthalmology

Endocrine Metabolic Disease

Respiratory Disease

Gastroenterology

Urology

Hematology

Rare Diseases

Immunology

Others

Wakayama

66

CLINICAL TRIALS

114

SITES

12

THERAPEUTIC AREAS



| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |

Yamagata

53

CLINICAL TRIALS

110

SITES

12

THERAPEUTIC AREAS

| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |



Yamaguchi

100

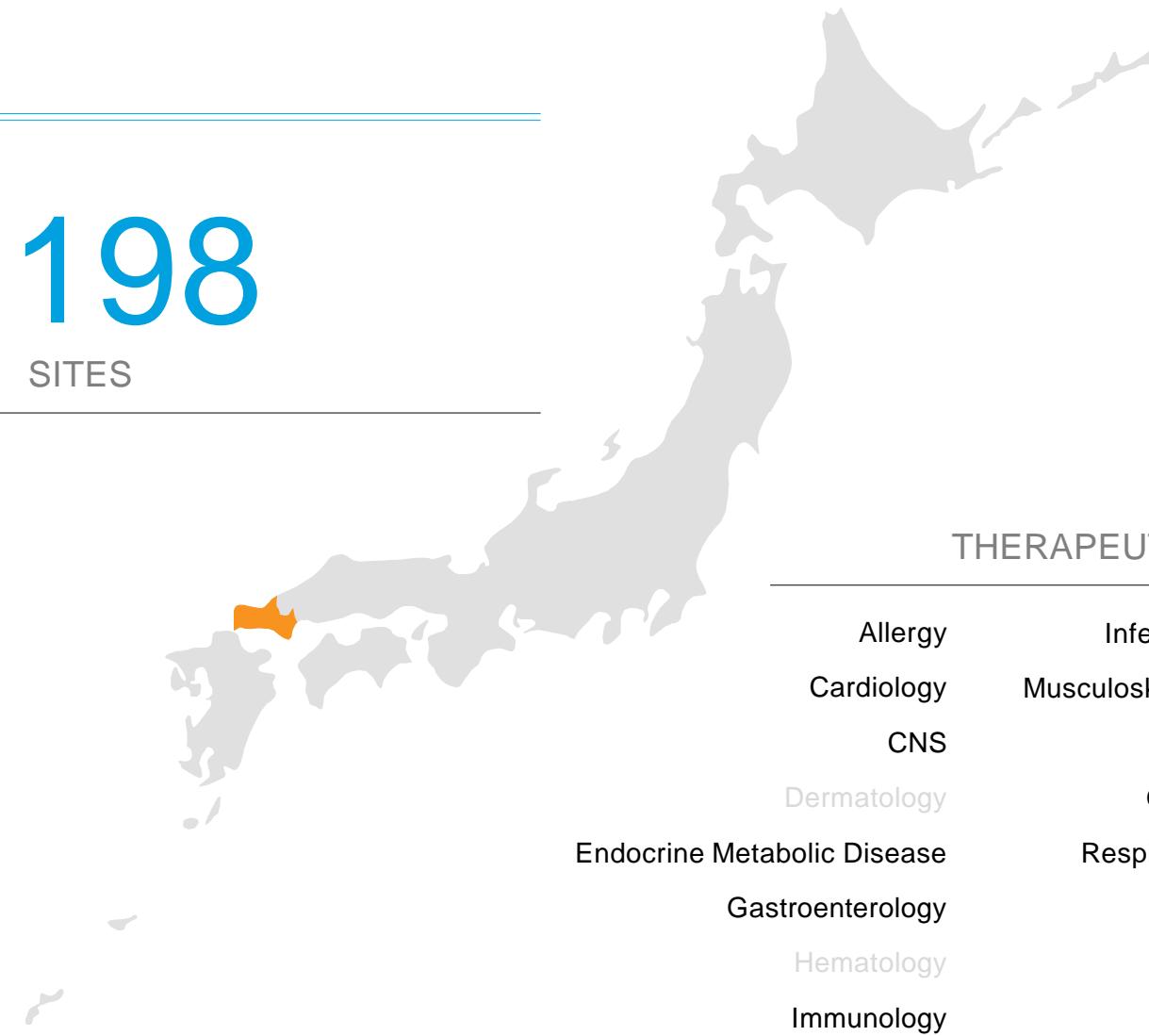
CLINICAL TRIALS

198

SITES

13

THERAPEUTIC AREAS



Yamanashi

58

CLINICAL TRIALS

98

SITES

16+

THERAPEUTIC AREAS

| | |
|-----------------------------|-------------------------|
| Allergy | Infectious Disease |
| Cardiology | Musculoskeletal Disease |
| CNS | Oncology |
| Dermatology | Ophthalmology |
| Endocrine Metabolic Disease | Respiratory Disease |
| Gastroenterology | Urology |
| Hematology | Rare Diseases |
| Immunology | Others |



Therapeutic Area Views

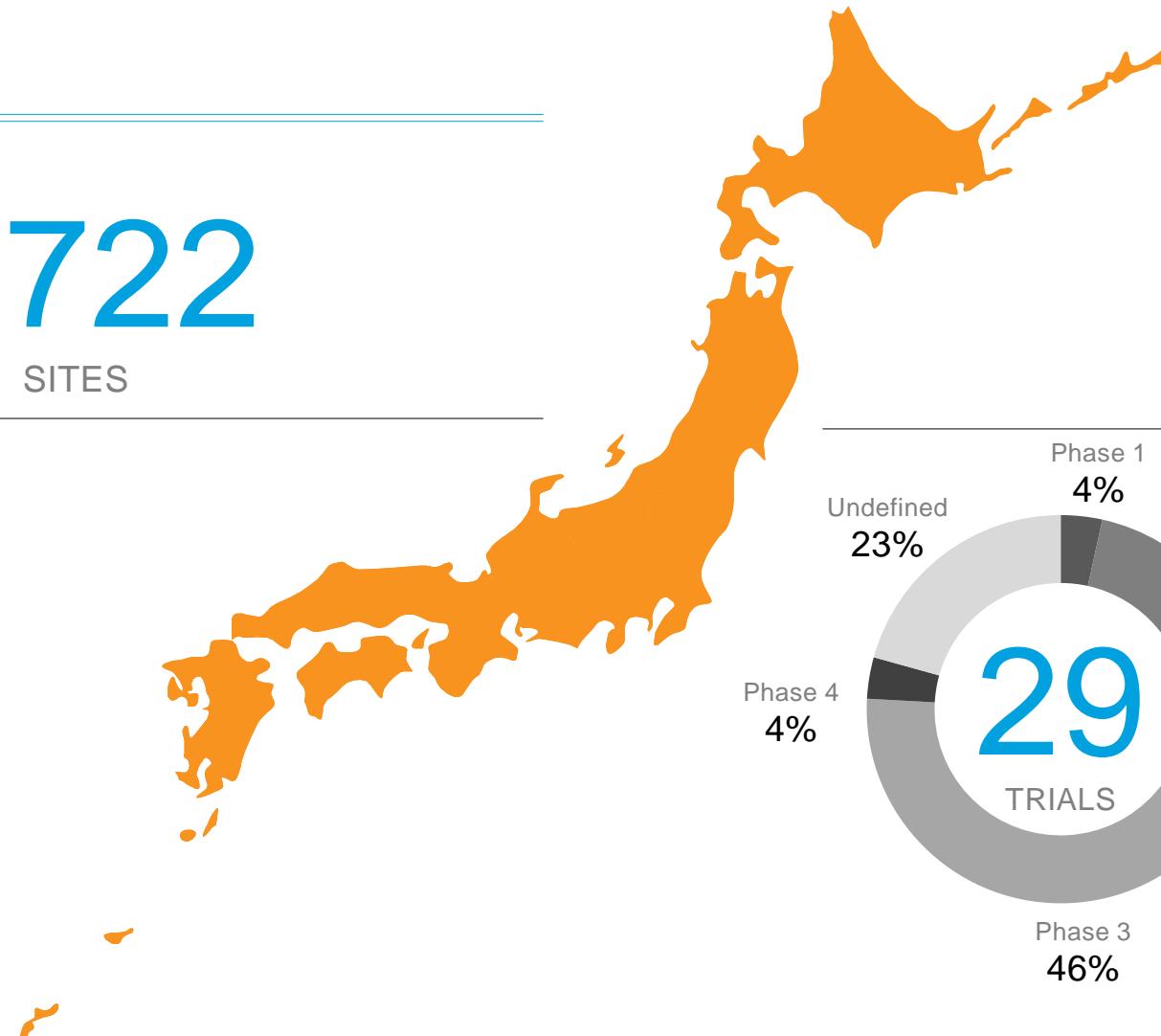
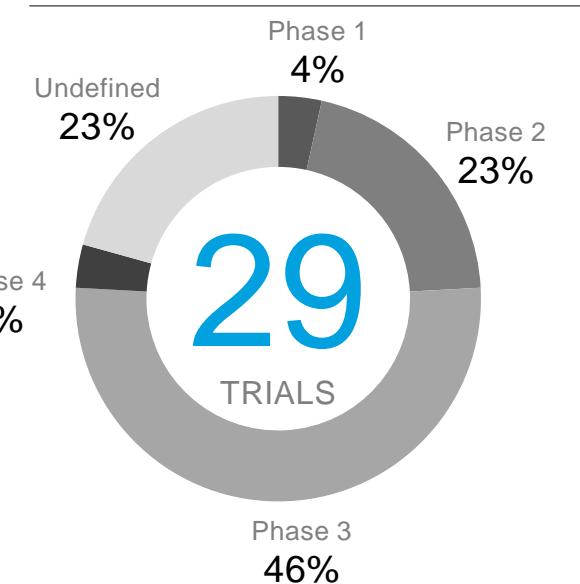
Allergy

29

CLINICAL TRIALS

722

SITES



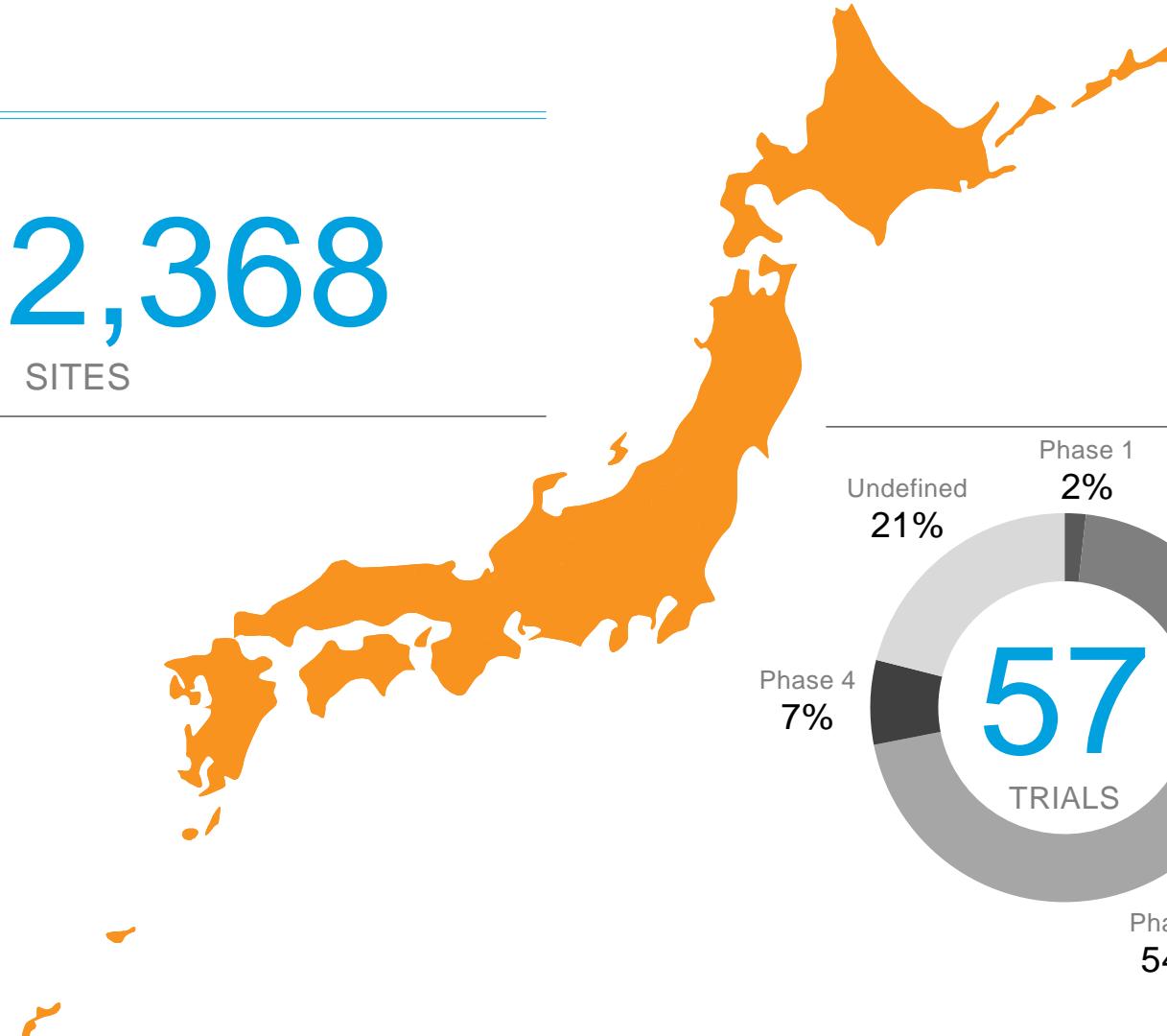
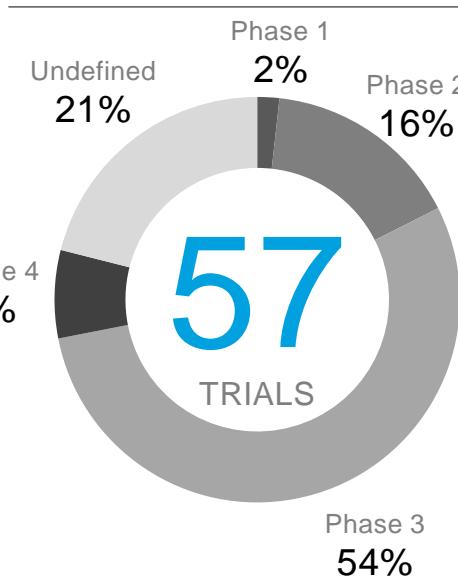
Cardiology

57

CLINICAL TRIALS

2,368

SITES



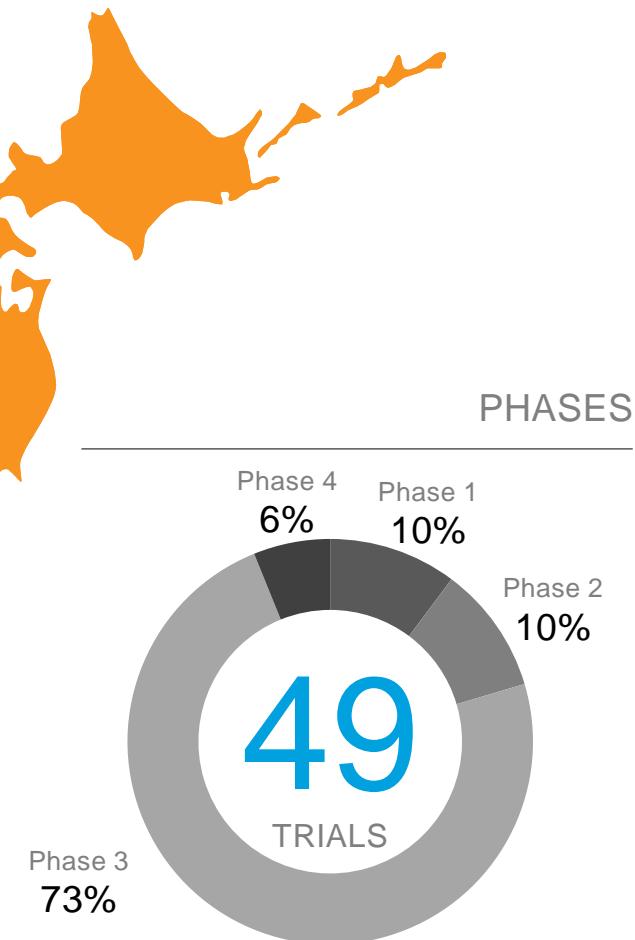
CNS

49

CLINICAL TRIALS

714

SITES



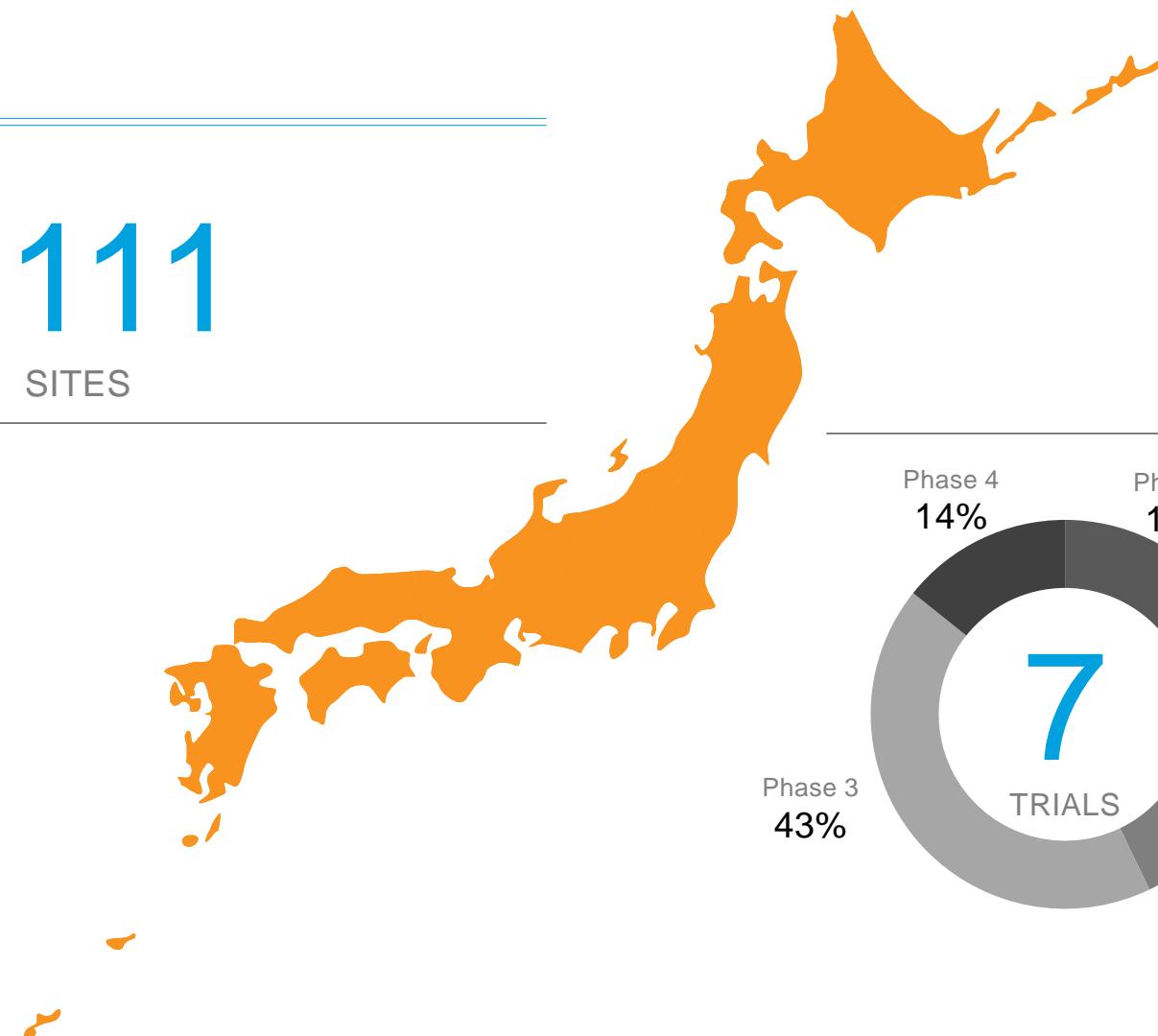
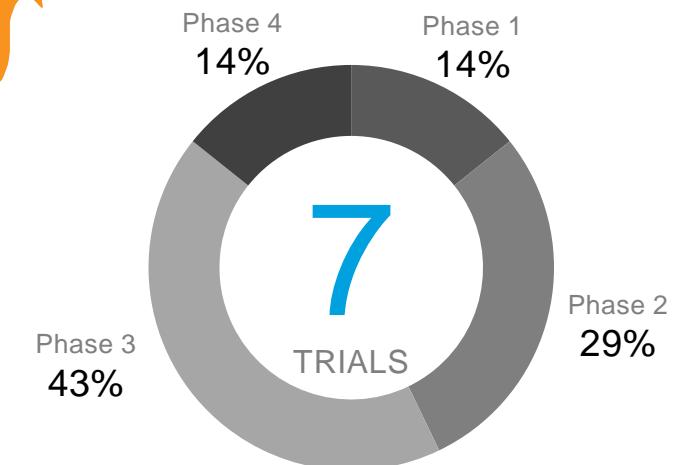
Dermatology

7

CLINICAL TRIALS

111

SITES



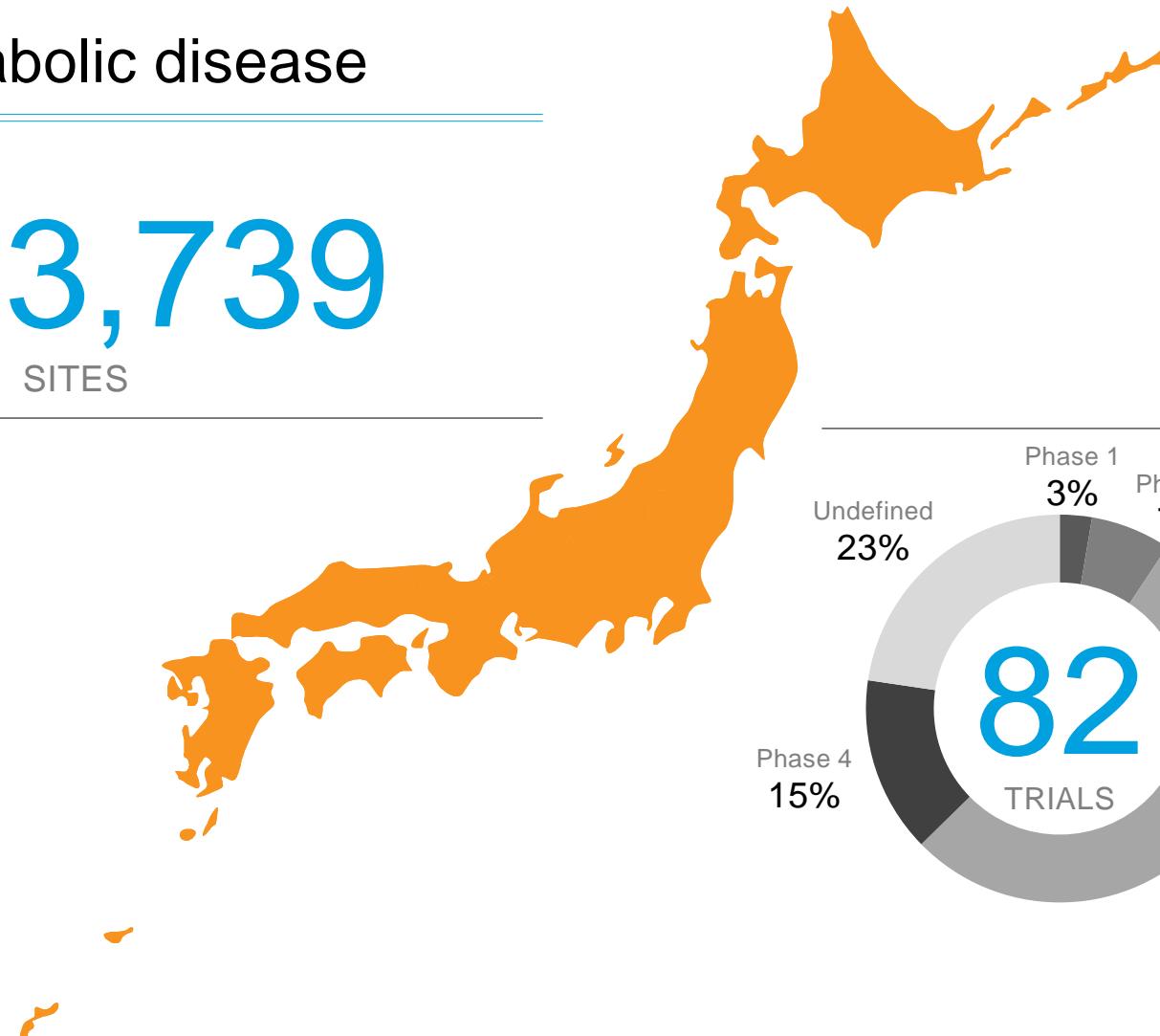
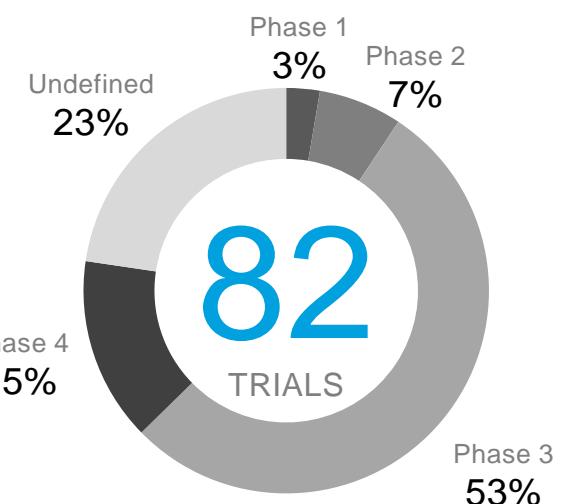
Endocrine metabolic disease

82

CLINICAL TRIALS

3,739

SITES



Gastroenterology

8

CLINICAL TRIALS

432

SITES



8

TRIALS

Phase 3
38%

Undefined
63%

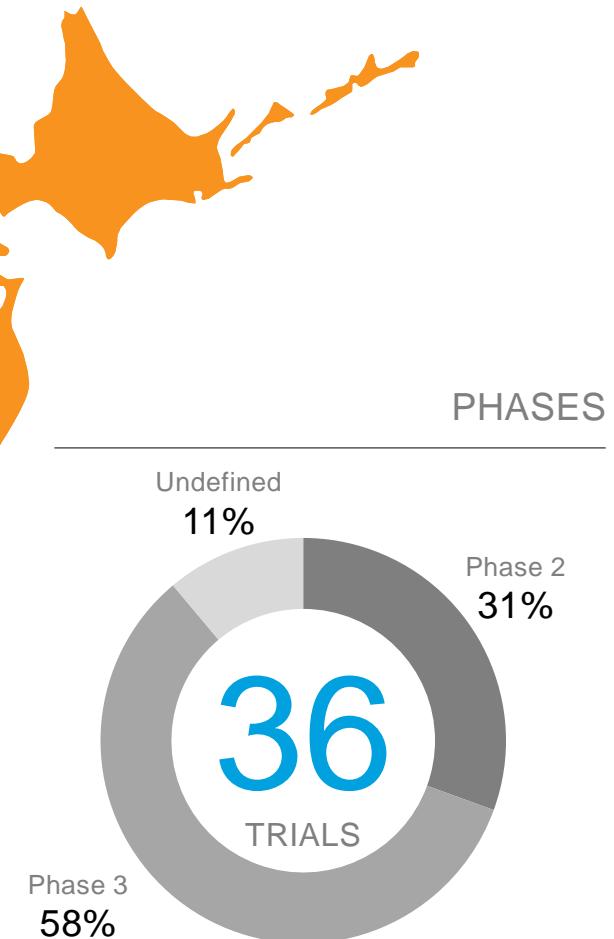
Hematology

36

CLINICAL TRIALS

219

SITES



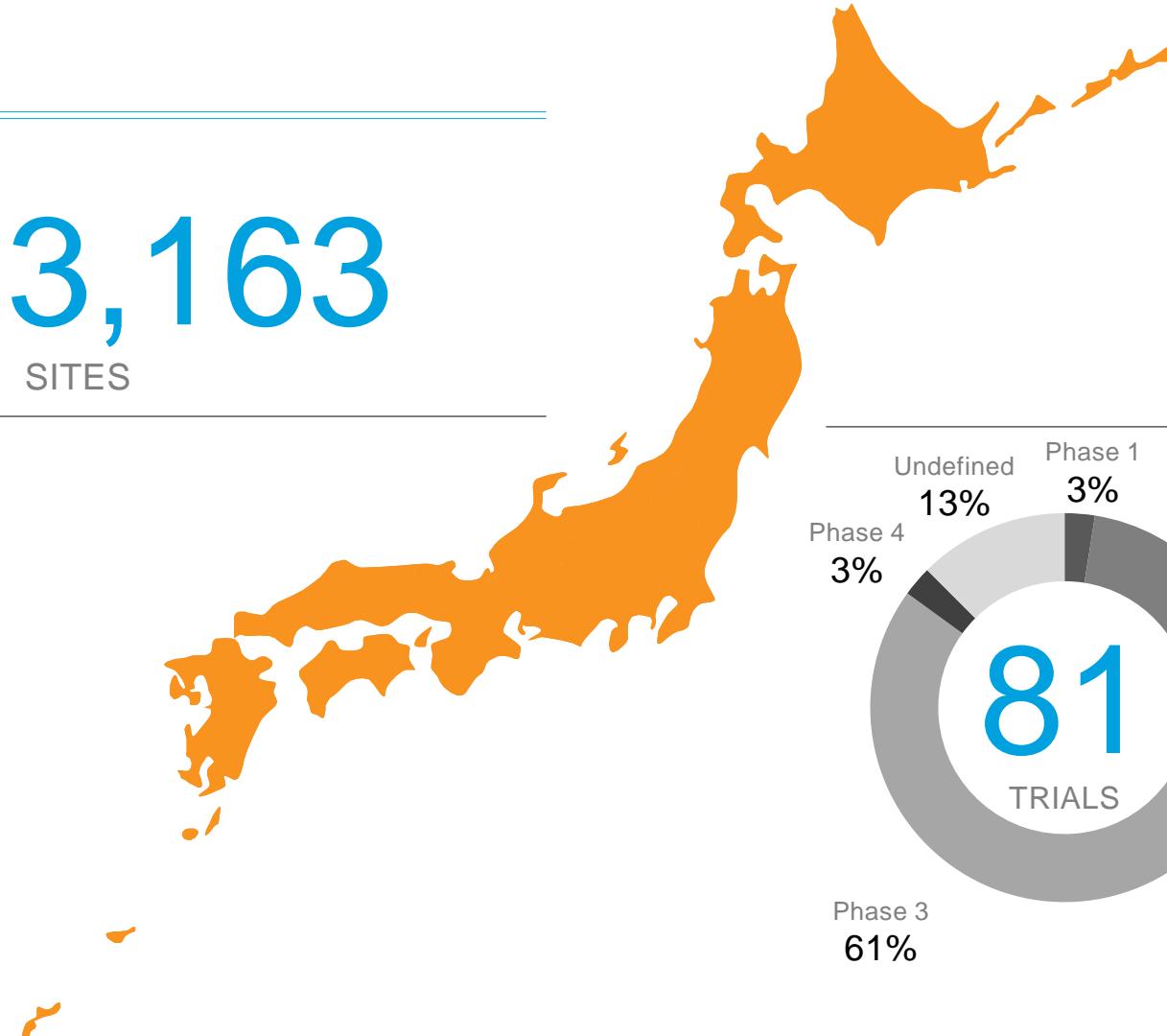
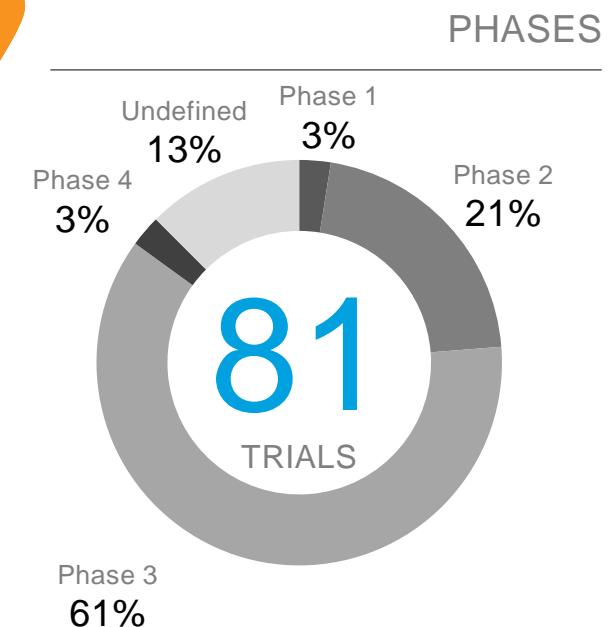
Immunology

81

CLINICAL TRIALS

3,163

SITES



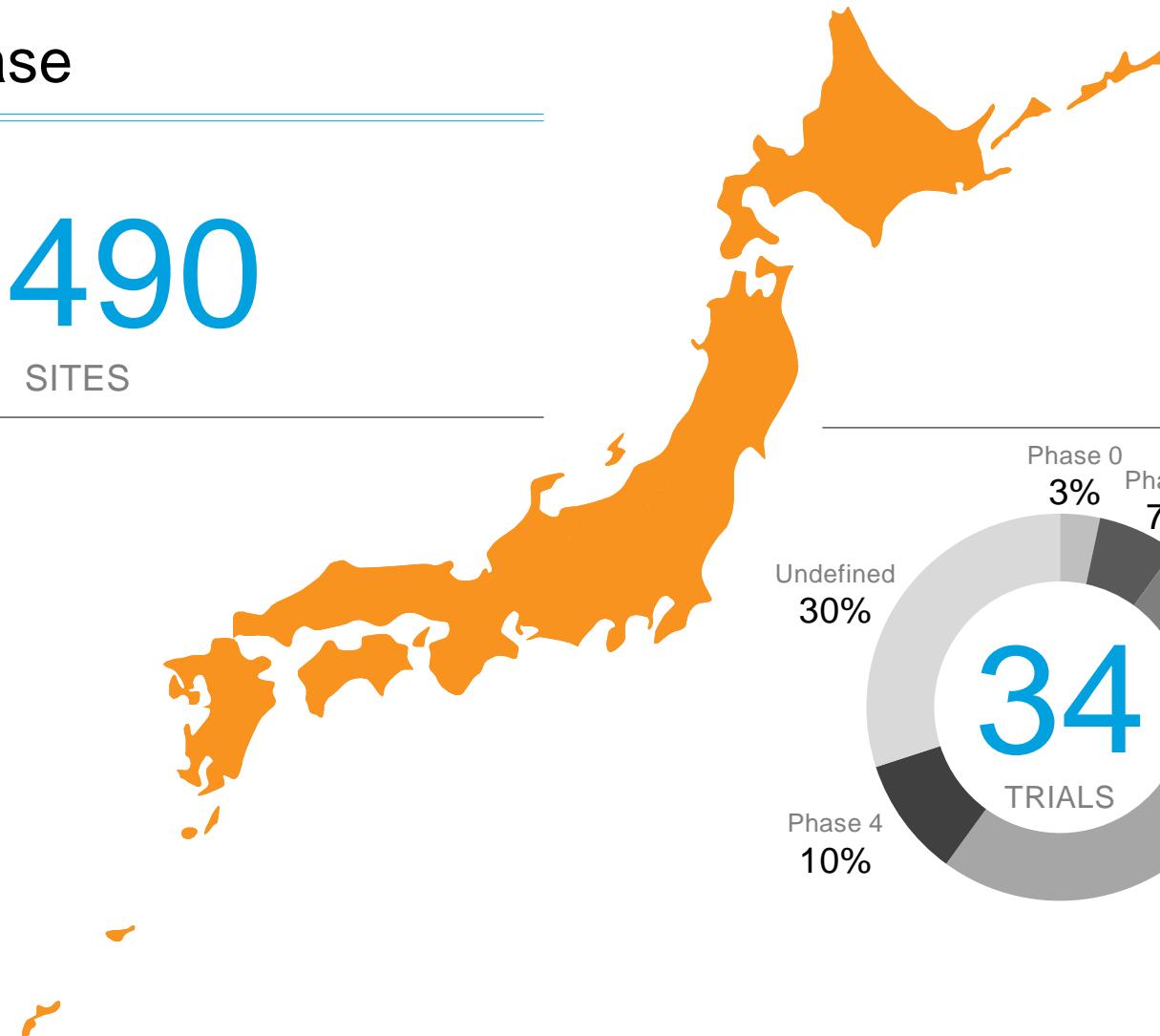
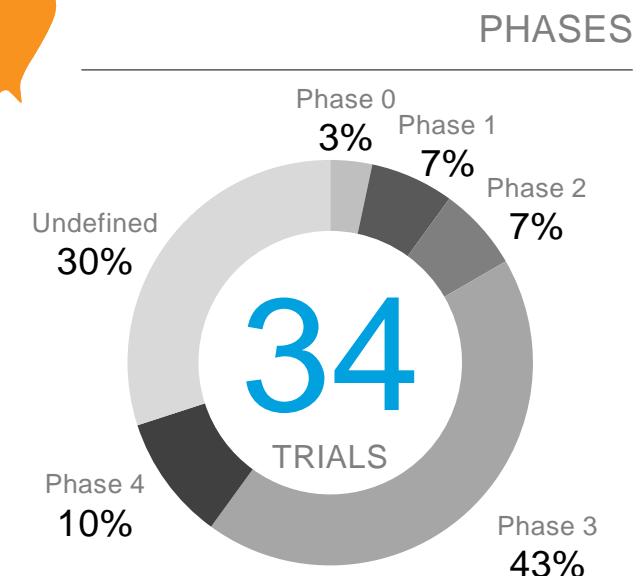
Infectious disease

34

CLINICAL TRIALS

490

SITES



Musculoskeletal disease

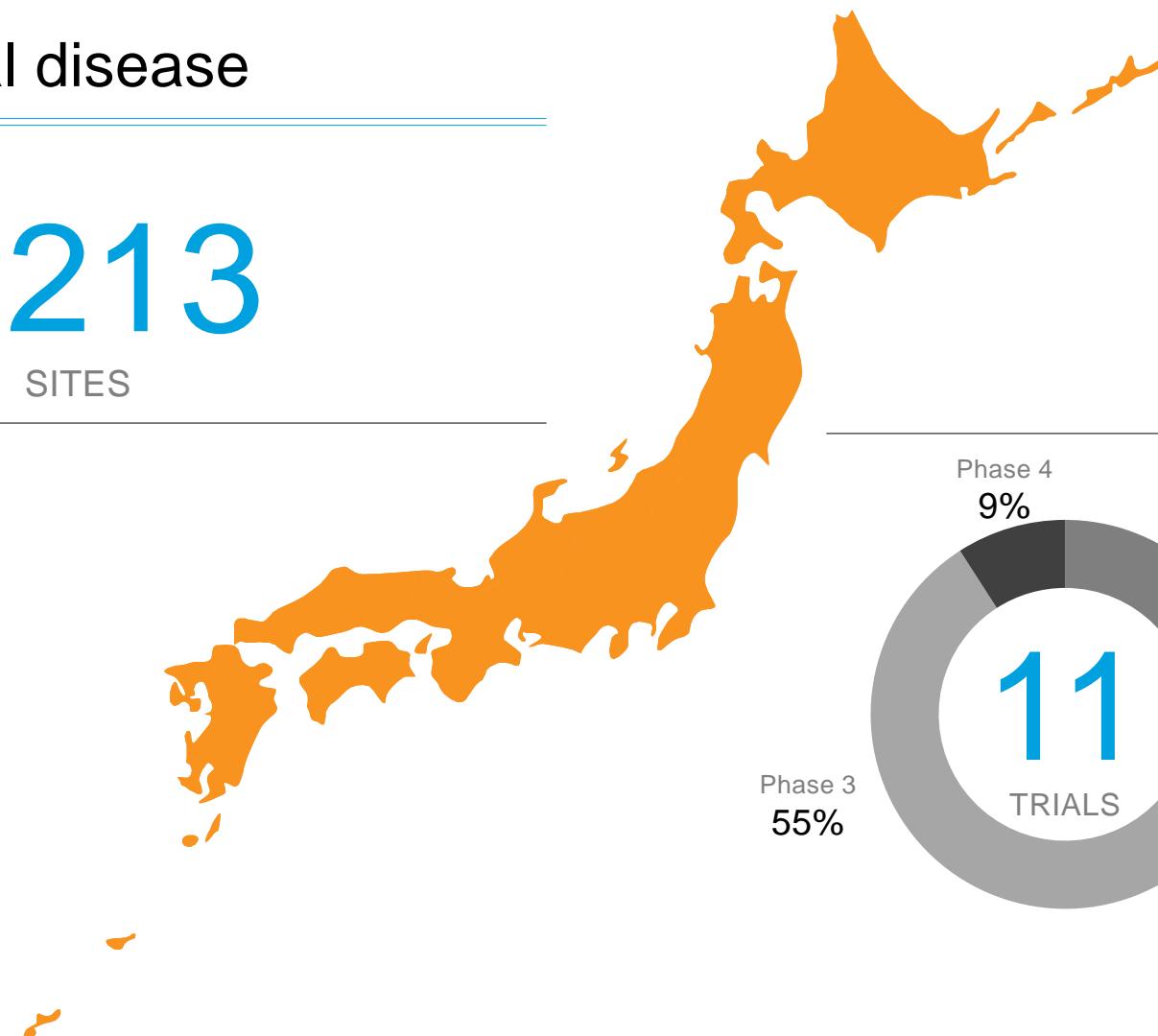
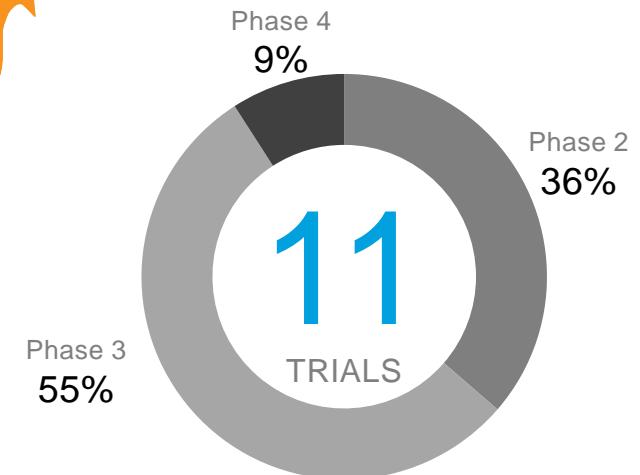
11

CLINICAL TRIALS

213

SITES

PHASES



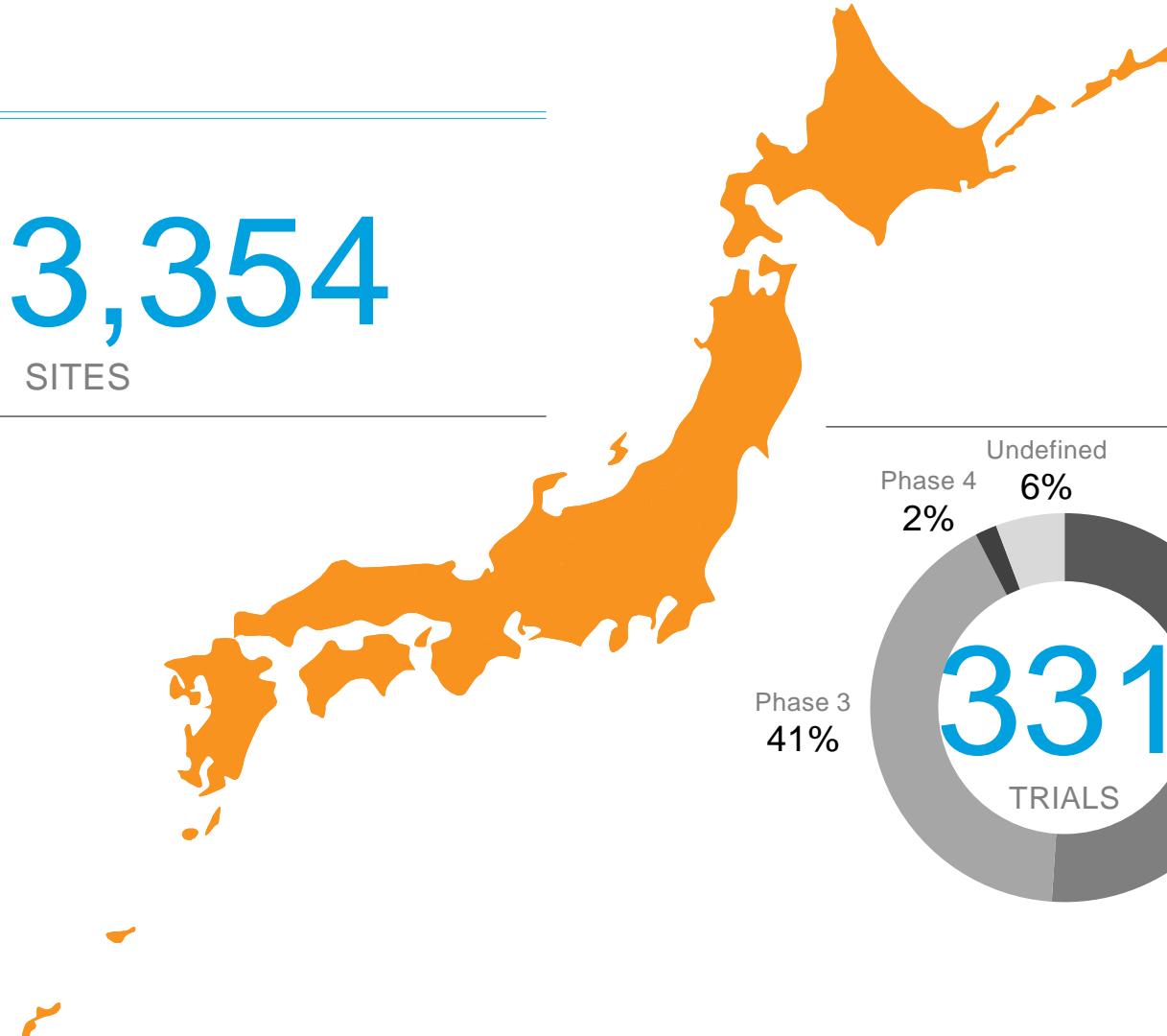
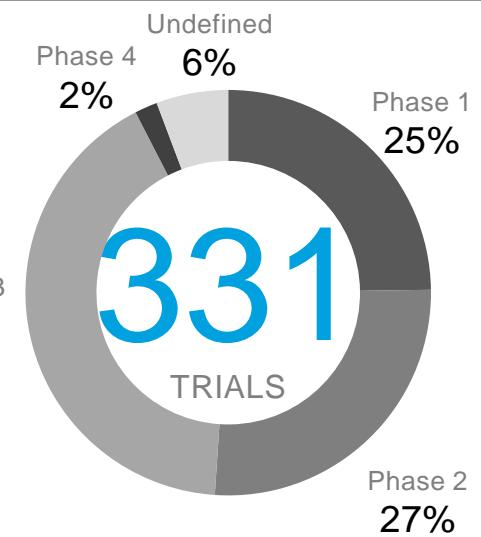
Oncology

331

CLINICAL TRIALS

3,354

SITES



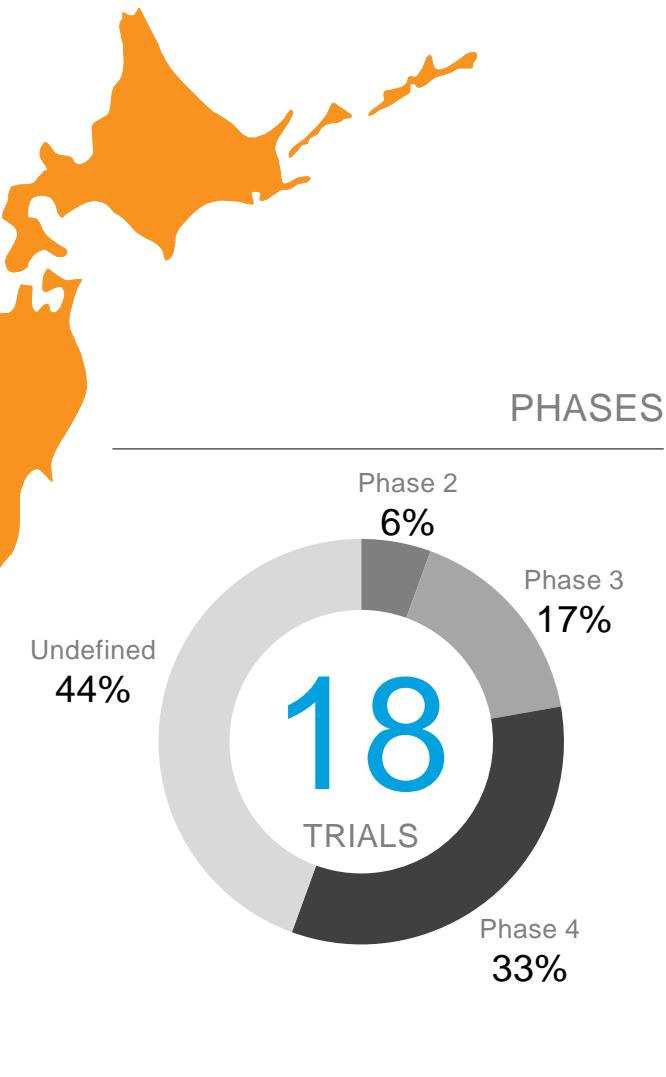
Ophthalmology

18

CLINICAL TRIALS

273

SITES



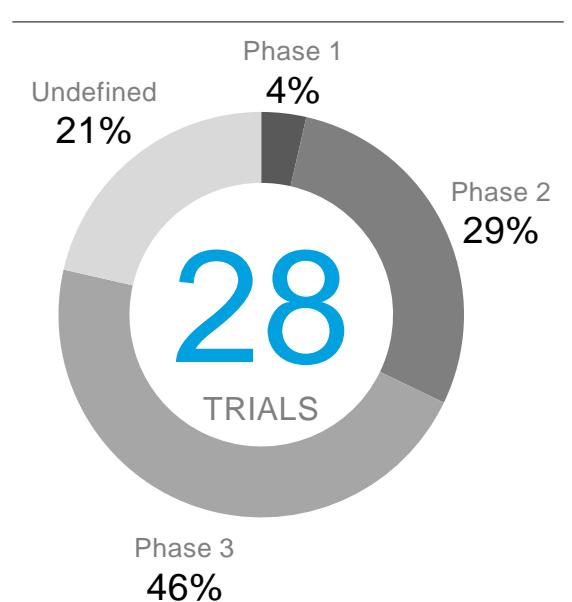
Rare disease*

28

CLINICAL TRIALS

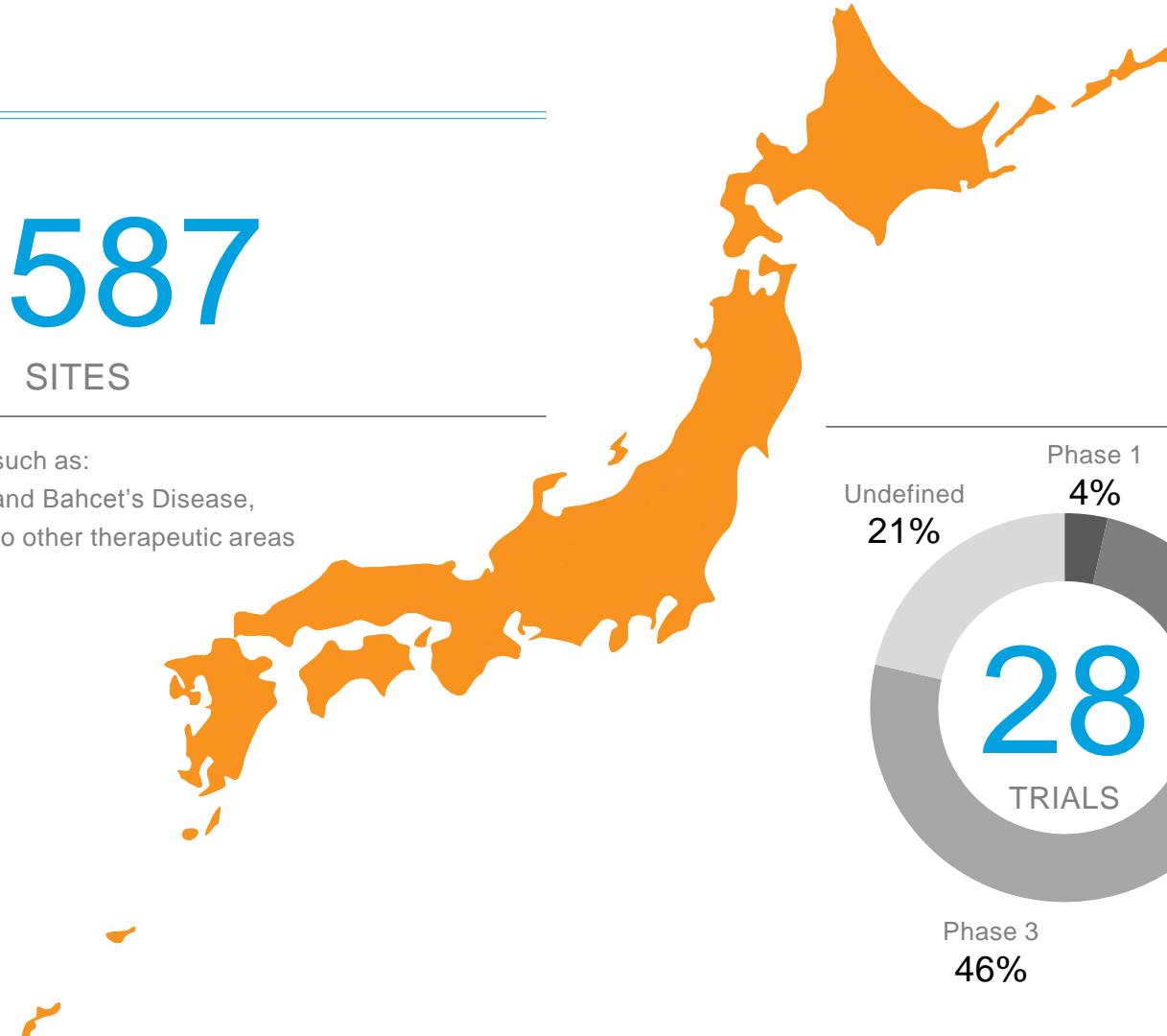
587

SITES



* Rare disease includes conditions such as:

Gaucher Disease, Myelofibrosis, and Bahcet's Disease,
which could not be categorized into other therapeutic areas



Respiratory disease

20

CLINICAL TRIALS

1,209

SITES

Undefined
20%

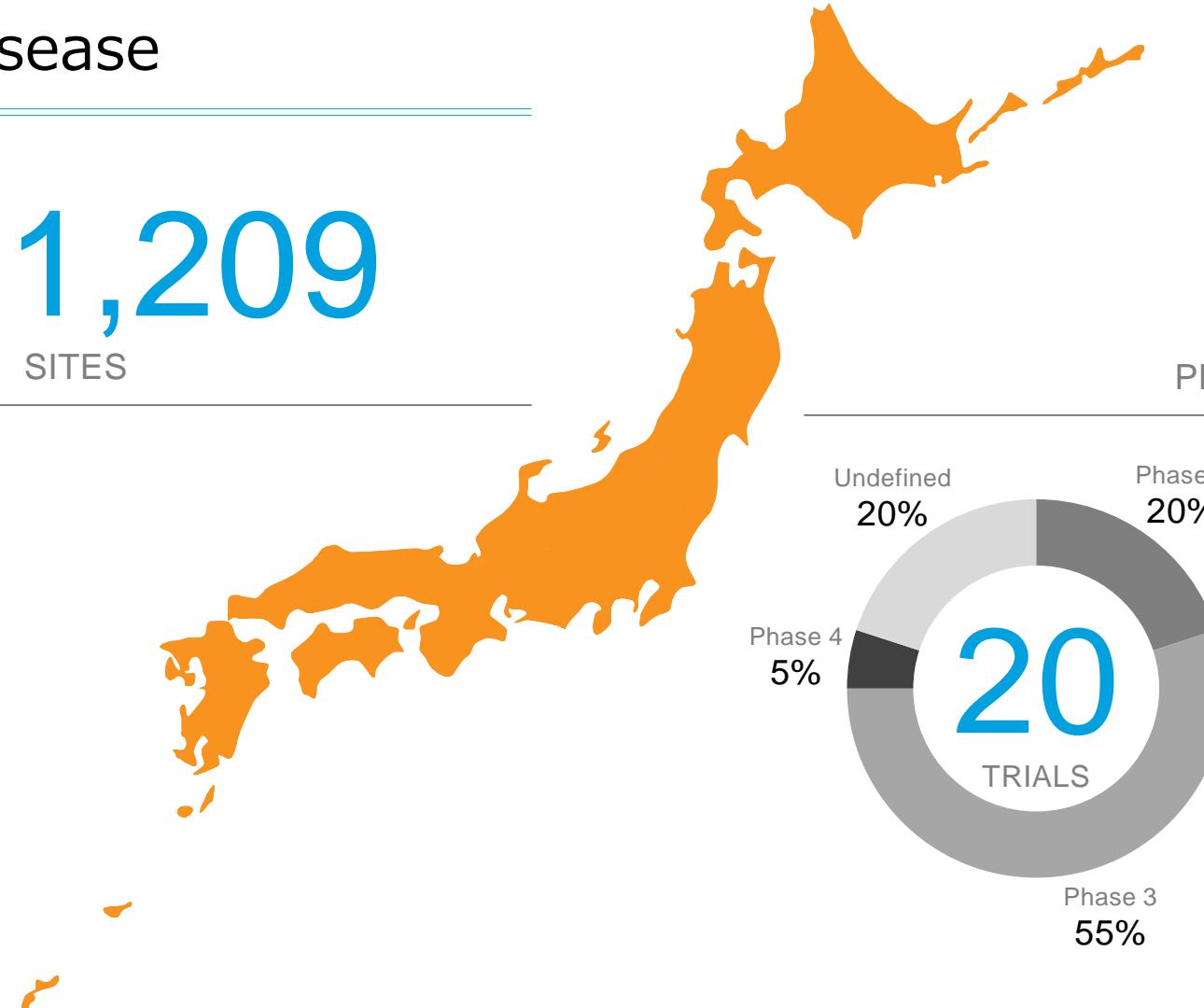
Phase 2
20%

Phase 4
5%

20

TRIALS

Phase 3
55%



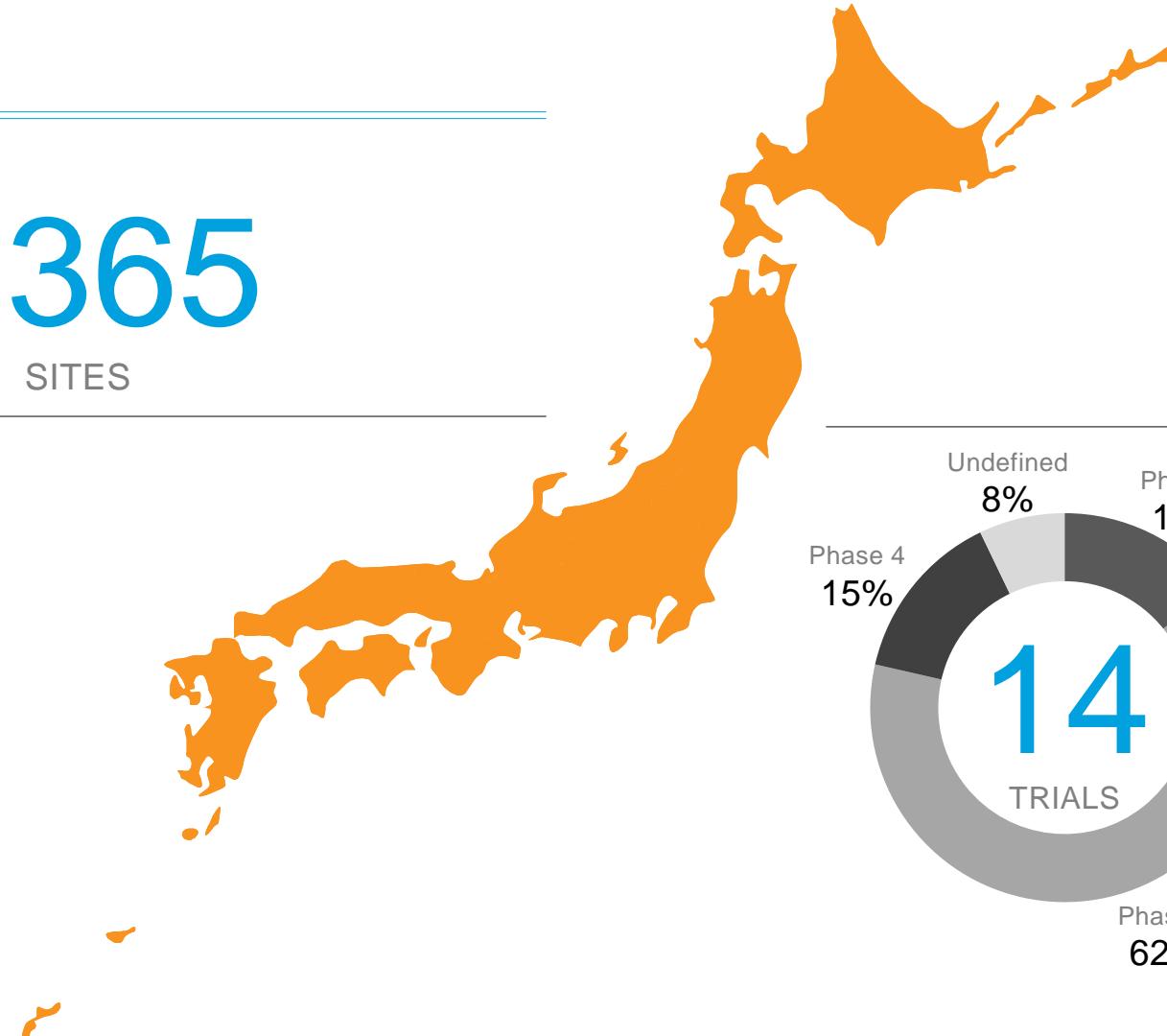
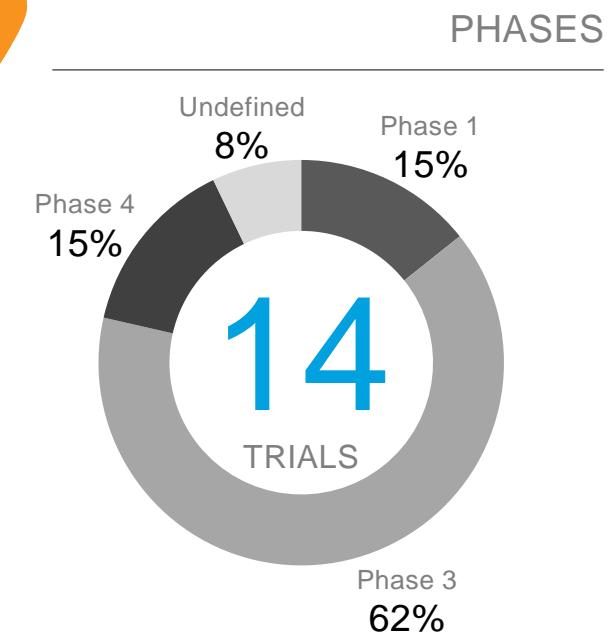
Urology

14

CLINICAL TRIALS

365

SITES



Others

20

CLINICAL TRIALS

136

SITES

PHASES

Undefined
35%

Phase 1
20%

Phase 2
10%

20

TRIALS

Phase 4
15%

Phase 3
20%

