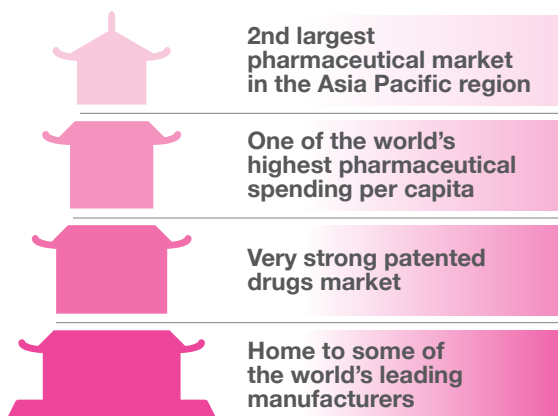


Key factors influencing the Japanese pharmaceutical market

Key statistics, opportunities & challenges



Opportunities

- Increased cooperation** between domestic & foreign manufacturers
- Ageing population** and rising number of chronic & long-term diseases
- Accelerated approval process** resulting in introduction of more high-value medicines

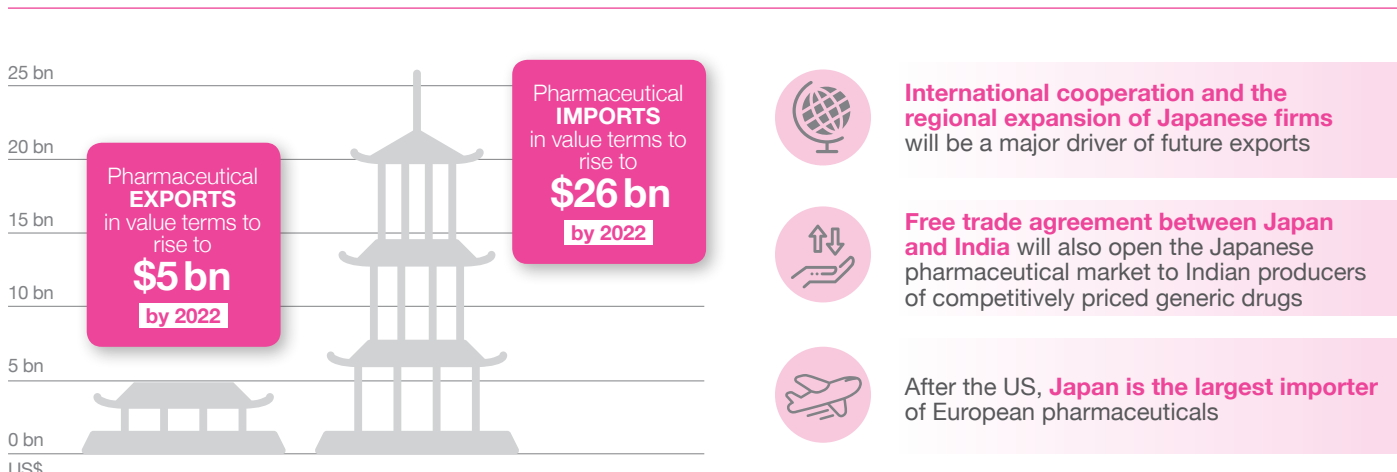
Challenges

- Competition** from emerging regional players
- Government cost-cutting measures**
- Reform of biennial price cuts** towards an annual price revision

A new regulatory landscape

- Widespread changes in health-related policies, regulations & laws**
- Introduction of a new regulatory pathway for regenerative medicines**
- Selected regions that offer eased regulations and tax benefits** are encouraging the creation of innovative drugs and medical devices in cardiology, neurology and ophthalmic treatments
- Ease of life science regulations, speed medicine approval times & laws promoting orphan drug development**
- The EU and Japan agreed to broaden the range of medicines** for which they will recognise each other's inspections of manufacturing sites

Industry forecast



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