

JPMA 72 Member Companies

ASAHI KASEI PHARMA CORPORATION
AJINOMOTO PHARMACEUTICALS CO., LTD.
ASKA Pharmaceutical Co.,Ltd.
Astellas Pharma Inc.
AstraZeneca K.K.
AbbVie GK
Eisai Co., Ltd.
MSD K.K.
Otsuka Pharmaceutical Co., Ltd.
ONO PHARMACEUTICAL CO., LTD.
KAKEN PHARMACEUTICAL CO.,LTD.
KISSEI PHARMACEUTICAL CO., LTD.
Kyoto Pharmaceutical Industries, Ltd.
KYORIN Pharmaceutical Co.,Ltd.
Kyowa Hakko Kirin Co., Ltd.
GlaxoSmithKline K.K.
Kracie Pharma, Ltd.
Kowa Company, Ltd.
Sanofi K.K.
Santen Pharmaceutical Co., Ltd.
SANWA KAGAKU KENKYUSHO CO., LTD.
Genzyme Japan K.K.
SHIONOGI & CO., LTD.
SEIKAGAKU CORPORATION

Zeria Pharmaceutical Co., Ltd.
Celgene K.K.
Senju Pharmaceutical Co.,Ltd.
DAIICHI SANKYO COMPANY, LIMITED
Taisho Pharmaceutical Co., Ltd.
Sumitomo Dainippon Pharma Co., Ltd.
TAIHO PHARMACEUTICAL CO., LTD.
Takeda Pharmaceutical Company Limited
Mitsubishi Tanabe Pharma Corporation
Chugai Pharmaceutical Co., Ltd.
TSUMURA & CO.
Teikoku Seiyaku Co., Ltd.
TEIJIN PHARMA LIMITED.
Terumo Corporation
TOA EIYO LTD.
Toray Industries, Inc.
TOYAMA CHEMICAL CO., LTD.
TORII PHARMACEUTICAL CO., LTD.
Alcon Japan Ltd.
Eli Lilly Japan K.K.
Nippon Kayaku Co., Ltd.
Nippon Chemiphar Co., Ltd.
Nippon Shinyaku Co., Ltd.
NIHON PHARMACEUTICAL CO., LTD.

Nippon Zoki Pharmaceutical Co., Ltd.
Japan Tobacco Inc.
Nippon Boehringer Ingelheim Co., Ltd.
Novartis Pharma K.K.
Novo Nordisk Pharma Ltd.
Bayer Yakuhin, Ltd.
Baxalta Japan Limited
HISAMITSU PHARMACEUTICAL CO.,INC.
Pfizer Japan Inc.
Fujimoto Pharmaceutical Corporation
Fuso Pharmaceutical Industries,Ltd.
Bristol-Myers K.K.
POLA PHARMA INC.
Mylan EPD G.K.
Maruishi Pharmaceutical. Co., Ltd.
Maruho Co.,Ltd.
Minophagen Pharmaceutical Co., Ltd.
Meiji Seika Pharma Co., Ltd.
Merck Serono Co., Ltd.
Mochida Pharmaceutical Co., Ltd.
Yakult Honsha Co.,Ltd.
Janssen Pharmaceutical K.K.
UCB Japan Co. Ltd.
WAKAMOTO PHARMACEUTICAL CO., LTD.

JPMA Industry Vision 2025

Bringing Innovation in Drug Discovery to the World

LEAFLET



Japan Pharmaceutical Manufacturers Association

2-3-11 Nihonbashi-Honcho, Chuo-ku, Tokyo 103-0023, Japan
Phone +81-3-3241-0326 Fax +81-3-3242-1767
<http://www.jpma.or.jp/english/>

Vision 1

Driving next-generation medicine with advanced drug discovery

~Contribution to P4+1 medicine~

■ We will help usher in the next generation of medicine (P4+1 medicine), taking drug discovery into a new era through both active use of advanced technologies and enhancement to existing technologies. We will aspire to provide each individual patient with the right drugs at the right time—including as preventive with the patient's understanding.

P4	Personalized	Personalization based on genetic and environmental factors
	Predictive	Precise prediction through the use of genetic information and biomarkers
	Preventive	Preventive intervention based on precise predictions
	Participatory	Patients' understanding of information and participation in medical care
+1	Progressive	Improvement in the quality and efficiency of medical treatment through advancement and combination of existing technologies

Strategic points for realizing the vision

- ▶ Cooperation and lobbying for medical database development and application to drug discovery
- ▶ Commitment to advanced drug discovery of the creation of personalized pharmaceuticals
- ▶ Combining existing drug-discovery technology and expertise through industry and cross-industry collaboration
- ▶ Initiatives related to systems for the realization of P4+1 medicine

JPMA Industry Vision 2025 Bringing Innovation in Drug Discovery to the World



Vision 2

Providing innovative drugs to 8 billion people worldwide

■ We will provide innovative drugs that we have developed to those who seek treatment, responding to the hopes of patients all over the world.

Strategic points for realizing the vision

- ▶ Responding to diverse needs and issues

Advanced countries

- Promoting understanding of the economic value that innovative drugs bring to the entire society
- Establishing (drug pricing) systems that adequately recognize innovation
- Ensuring pharmaceutical benefits in line with the actual medical setting and healthcare policies

Emerging countries

- Establishing a shared platform including harmonization between each pharmaceutical legislation and systems
- Helping to establish foundations (infrastructure) for pharmaceutical manufacturing

Developing countries

- Helping to establish foundations for medical care
- Establishing the supply chains required in order to deliver pharmaceuticals

- ▶ Building JPMA's capabilities to achieve the vision

Vision 3

Leading the Japanese economy forward as a high value-added industry

- We will create innovative drugs by improving management efficiency, in particular by streamlining R&D, and contribute to public health worldwide.
- As a result, we will also contribute to Japan's economic growth, becoming a high value-added industry that plays an important role in Japan's future.

Strategic points for realizing the vision

- ▶ Streamlining and rationalizing of R&D to create innovative drugs
- ▶ Creating new value through cross-industry collaboration
- ▶ Accelerating the growth of markets and investment through global expansion
- ▶ Efforts to streamline business management to secure funds for investment

Vision 4

Supporting to create an advanced healthcare country

~Creating a society where people can live long, healthy lives with peace of mind~

- We will encourage patients to play an active role in their treatment, and will encourage people to enjoy more fulfilling lives, while supporting to improve the sustainability of the social security system.

Advanced healthcare country is a country that caters to various styles of life, work and life design, and enables everyone to continue to live active and successful lives in security and with peace of mind (as defined in the Ministry of Health, Labour and Welfare's "Japan Vision: Health Care 2035 Report"). It also means a country that positions social security as an investment in the people of Japan rather than as a cost, and that leads the world through the active initiatives.

Strategic points for realizing the vision

- ▶ Creating a society where patients participate in their own medical treatment
- ▶ Enhancing our policy advisory capabilities for mechanisms for the provision and reimbursement of pharmaceuticals that will support a healthy, long-life society

Vision 5

Becoming a trustworthy industry with noble aspiration

- We will maintain high aspirations to fulfill our mission and become an industry that earns the trust of its stakeholders, with initiatives and codes of practice that are respected in Japan and even overseas.
- We will seek to improve understanding of the importance of innovation in drug discovery, encouraging more people to aspire to a career in pharmaceuticals, to otherwise seek to participate, or simply to have confidence in the future of drug discovery.

Strategic points for realizing the vision

- ▶ Initiatives to strengthen compliance
- ▶ Initiatives to promote environmental preservation and health and safety
- ▶ Strengthening external communication capabilities for achieving policy goals

Addendum

To fulfill our mission and contribute to global health

R&D:

Participating in partnerships to revitalize new drug discovery

Access to medicines:

Establishing systems for delivering medicines to the world

Human resource development:

Transferring skills and knowhow to improve access to medicines

Point of view with regard to corporate scale and reorganization

Threats to the pharmaceutical industry:

Changing product characteristics (such as the shift from low-molecular-weight compounds to biopharmaceuticals) and spiraling costs of R&D

Issues to be addressed by R&D-based pharmaceutical companies:

Each company should consider its optimal business scale and corporate structure and make management decisions accordingly.