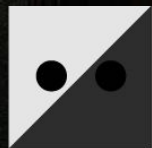


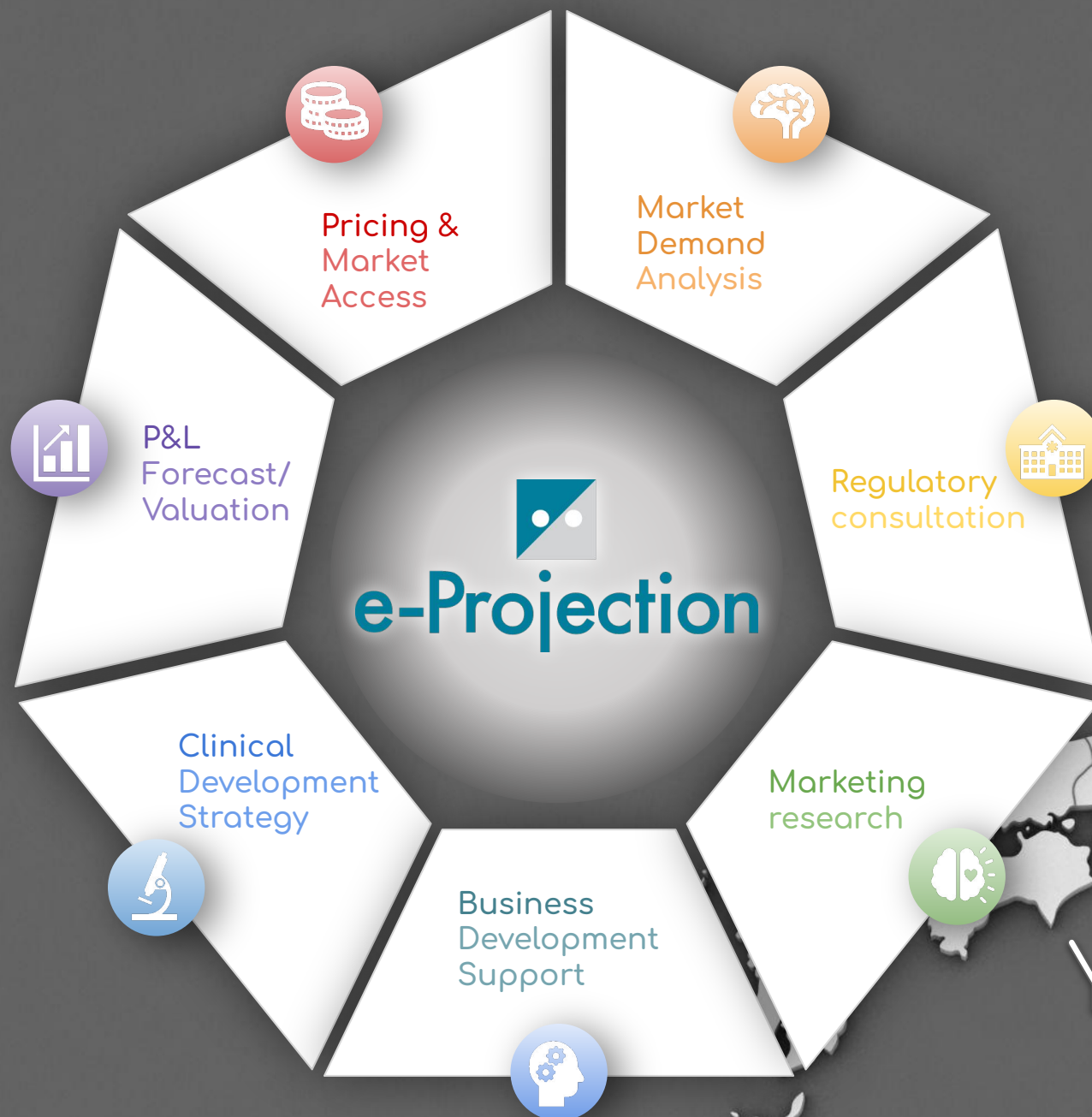
From Conjecture to Clarity

Supporting the Healthcare Industry
with Local Industry Knowledge
and Marketing Expertise



e-Projection

January 2022








Your Partner of Choice
in Japan

Who we are





Team of experts covering all that you need to know and with a broad range of experience in the Japanese market

Management team



Tosh Nagate DVM, Ph.D., MBA
Founder & CEO





Vivian Zhou, MA
Partner, China Affairs



Mayuko Yamagishi
SPM - Domestic Business







Hikari Matsuda
SPM - International Business






Advisory board




Shojiro Takagi MD, Ph.D., MBA
R&D and medical strategy







Itaru Nakanishi
Pricing & market access



Takashi Yamano
Commercial planning



Regulatory affairs expert




Capabilities

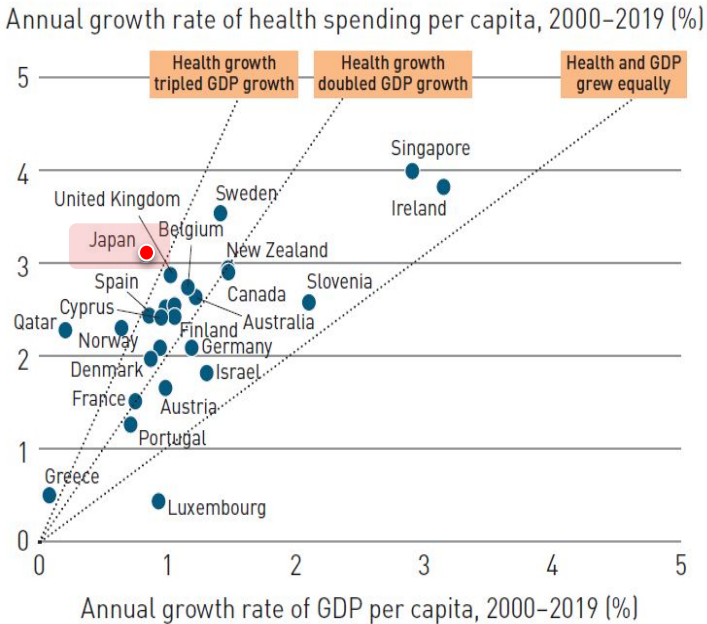
Our advanced analytics capabilities combined with our experienced experts and extensive local network will provide our international clients with best-in-class solutions




Why Japan now?

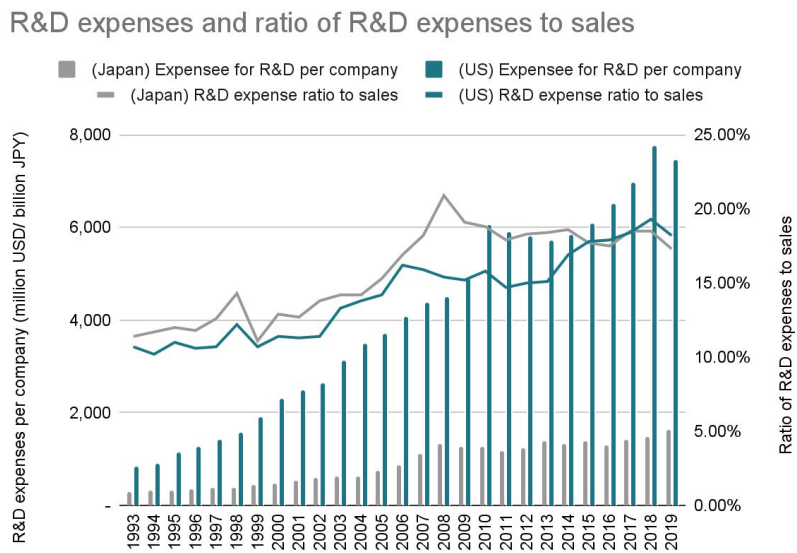
Japan as the market which best embraces and values innovation in the healthcare sector; offering the opportunity to non-Japanese biotechs with early access to the market

 **Vigorous Growth of the Healthcare Market**




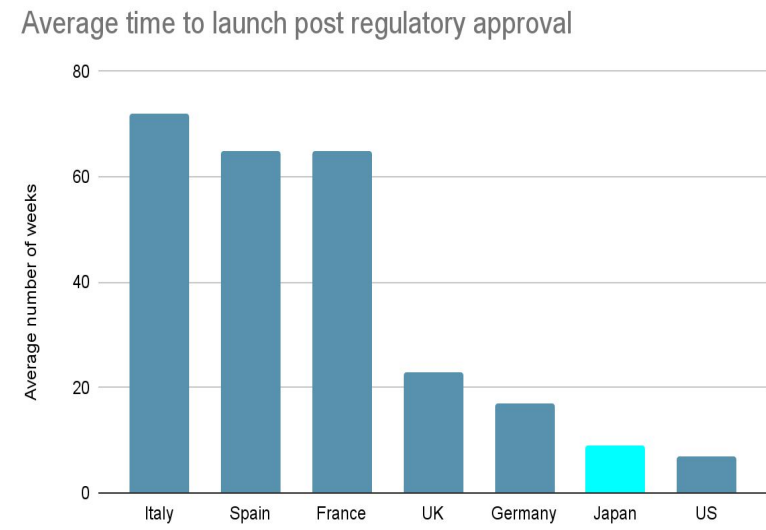
Source: *Global expenditure on health 2021 (WHO)*
<https://apps.who.int/iris/bitstream/handle/10665/350560/9789240041219-eng.pdf>

 **Appetite in the Industry to invest more on R&D**



Source: *Pharmaceutical industry vision 2021 (mhlw)*
<https://www.mhlw.go.jp/content/10800000/000831974.pdf>

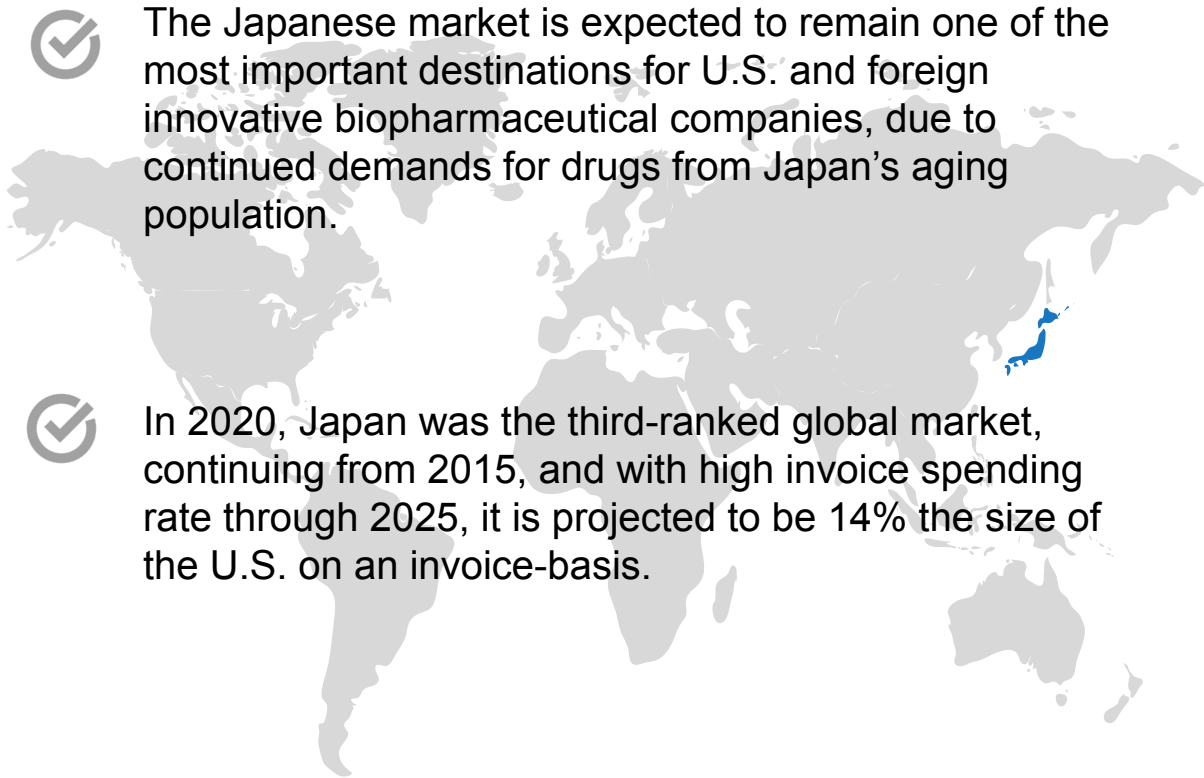
 **Regulators/Payers appreciate innovation**



Source: *MARKET ACCESS TRENDS ACROSS THE EU5 & US: 2009 to 2016- AN UPDATE*
<https://cdn-mme.azureedge.net/wp-content/uploads/2020/04/PHP147.pdf>

The Third Largest Country Market: Japan




Japan continues to be one of the largest pharmaceutical markets in the world, and provides foreign companies with business opportunities



✓ The Japanese market is expected to remain one of the most important destinations for U.S. and foreign innovative biopharmaceutical companies, due to continued demands for drugs from Japan’s aging population.

✓ In 2020, Japan was the third-ranked global market, continuing from 2015, and with high invoice spending rate through 2025, it is projected to be 14% the size of the U.S. on an invoice-basis.

Global Top 10 Countries.
Ranking and Invoice Spending Relative to the United States in 2025

Rank	Country		% of US Spending
1	United States		100.0%
2	China		29.2%
3	Japan		14.0%
4	Germany		11.1%
5	Brazil		6.7%
6	France		6.5%
7	Italy		6.3%
8	United Kingdom		5.9%
9	India		5.2%
10	Russia		5.0%

Source: Global Medicine Spending and Usage Trends outlook to 2025 (IQVIA)

Our Services: Research and Analysis

“One-stop shop” consultation including all the necessary facets to evaluate and make decisions of your Japan strategy

Market Demand Analysis



Forecasting models



Biosimilar market analysis

Regulatory Consultation



Gap analysis



Preliminary dialogues with regulatory officials

Pricing & Market Access



Pricing assumptions

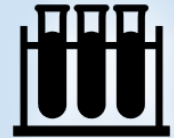


In-Depth Interviews with MLHW Officials

Clinical Development Strategy



Assessment of target product profiles



Design a strategic development plan

P&L Forecast/Valuation



P&L assumptions



Commercialization strategy/salesforce optimization

Market Research



Primary research



Real world data analysis



Our Services: Business Development support

We are capable in supporting our clients throughout the entire process, but most beneficial in expediting the negotiation process using our analytical skills

