

일본계 제약기업의 한국시장 사업 전개 상황

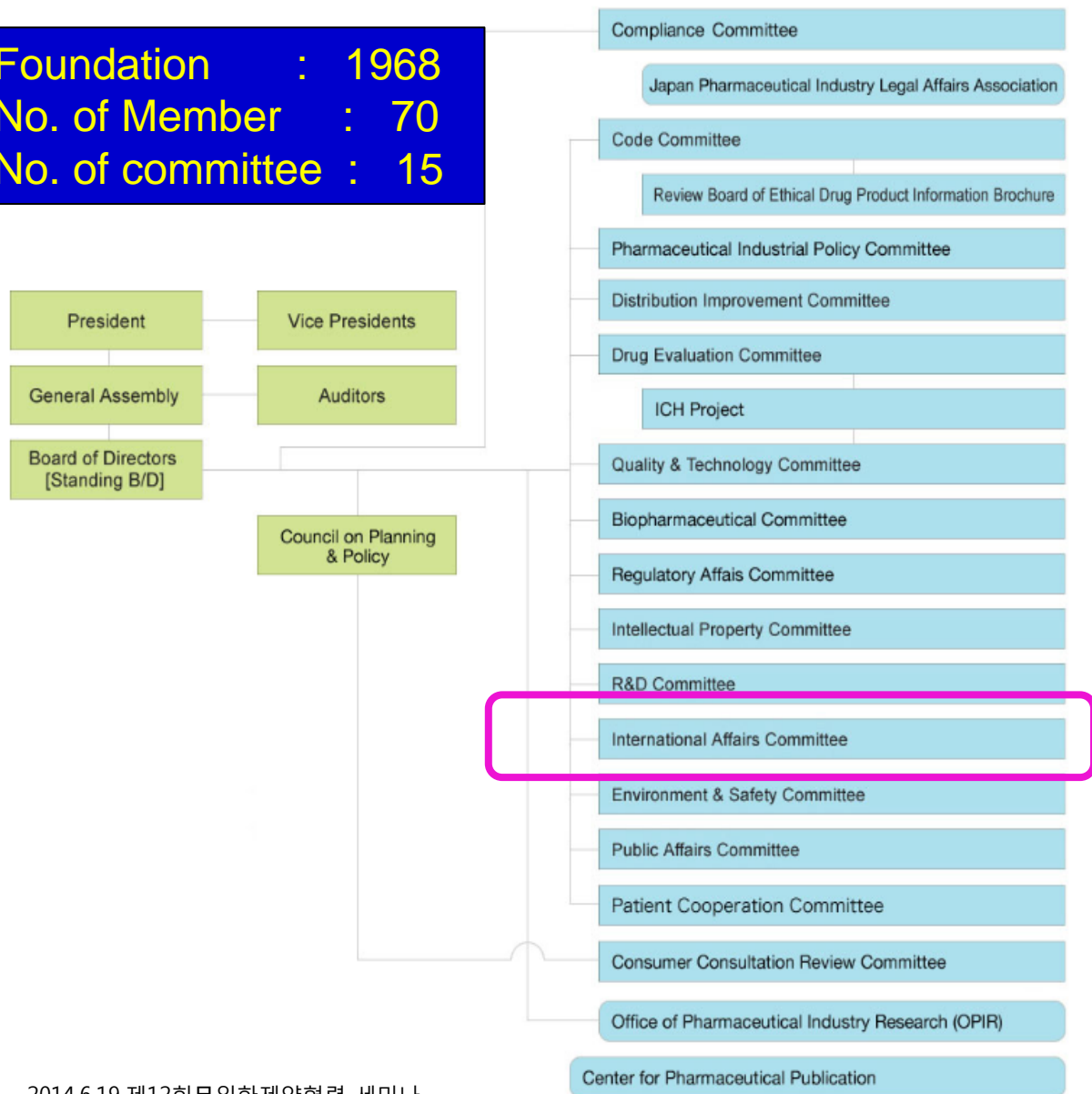
2014년 6월19일
일본제약공업협회
국제위원회 아시아부 한국팀

- 제약협회 국제위원회 소개
- 한국 의약품 시장 개요
- 주한 일본계 기업 활동 상황

The Japan Pharmaceutical Manufacturers Association



Foundation : 1968
No. of Member : 70
No. of committee : 15

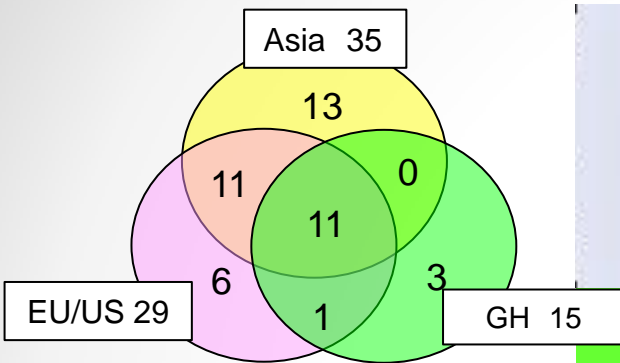


International Affairs Committee

Attends international meetings and conferences with IFPMA, other associations, and international organizations, to clarify issues which member companies have and propose policies.

Supports promoting GMP for better quality assurance in Asian countries.

International Affairs Committee



International Affairs Committee

Leadership c.

EU/US Sc.

EU/US Group

Emerzing Group

※
Asia Sc.

Started in May, 1996

Market Group

R A Group

Info. Group

Global Health Sc.

IFPMA Group

NCD s Group

Counterfeit Group

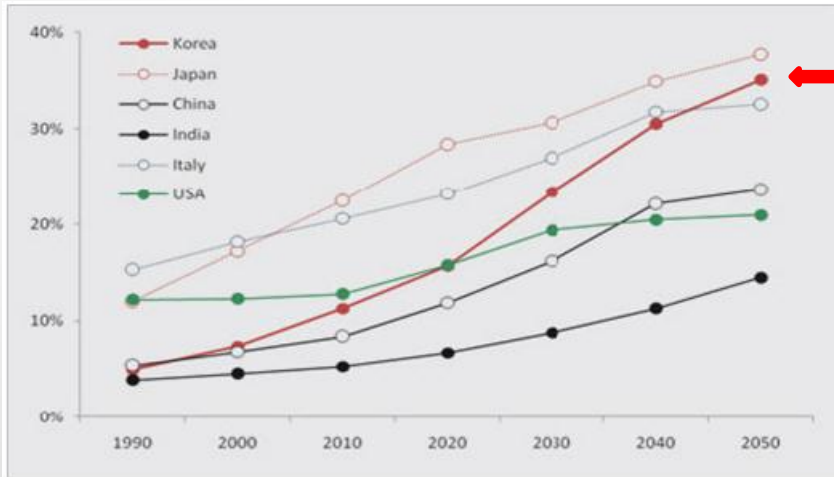
※ Korea Team : 27

- 제약협회 국제위원회 소개
- 한국 의약품 시장 현황
- 주한 일본 기업 활동 상황

Pharmaceutical Business Environment

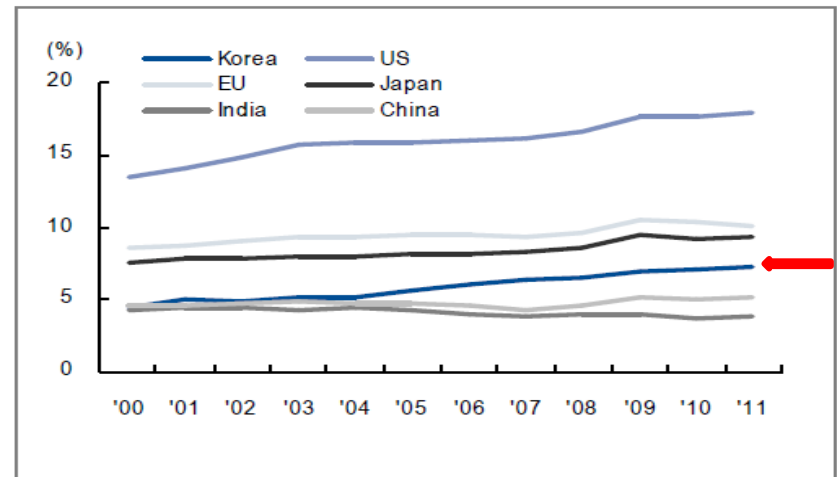
- Healthcare spending to expand over mid to long term driven by rapid growth of ageing population
 - ✓ The elderly portion (≥ 65) is 12.2% of total population, 50 million and rose **4.9%** over 2000~2013
 - ✓ Healthcare spending as a portion of GDP is 7.5% in 2011 and grew **1.7%** over 2000~2011
 - ※ GDP growth is forecast to increase to 3.7% in 2014 (GDP, 2013: 1.19 trillion USD)

Growth rate of elderly population (≥ 65) by countries



Source: OECD, Korea Index of Medical Specialties

Healthcare spending-to-GDP ratio, by country



Note: 2012 figures are based on the OECD release.
Source: OECD, Woori I&S Research Center

FY2013 Sales Performance

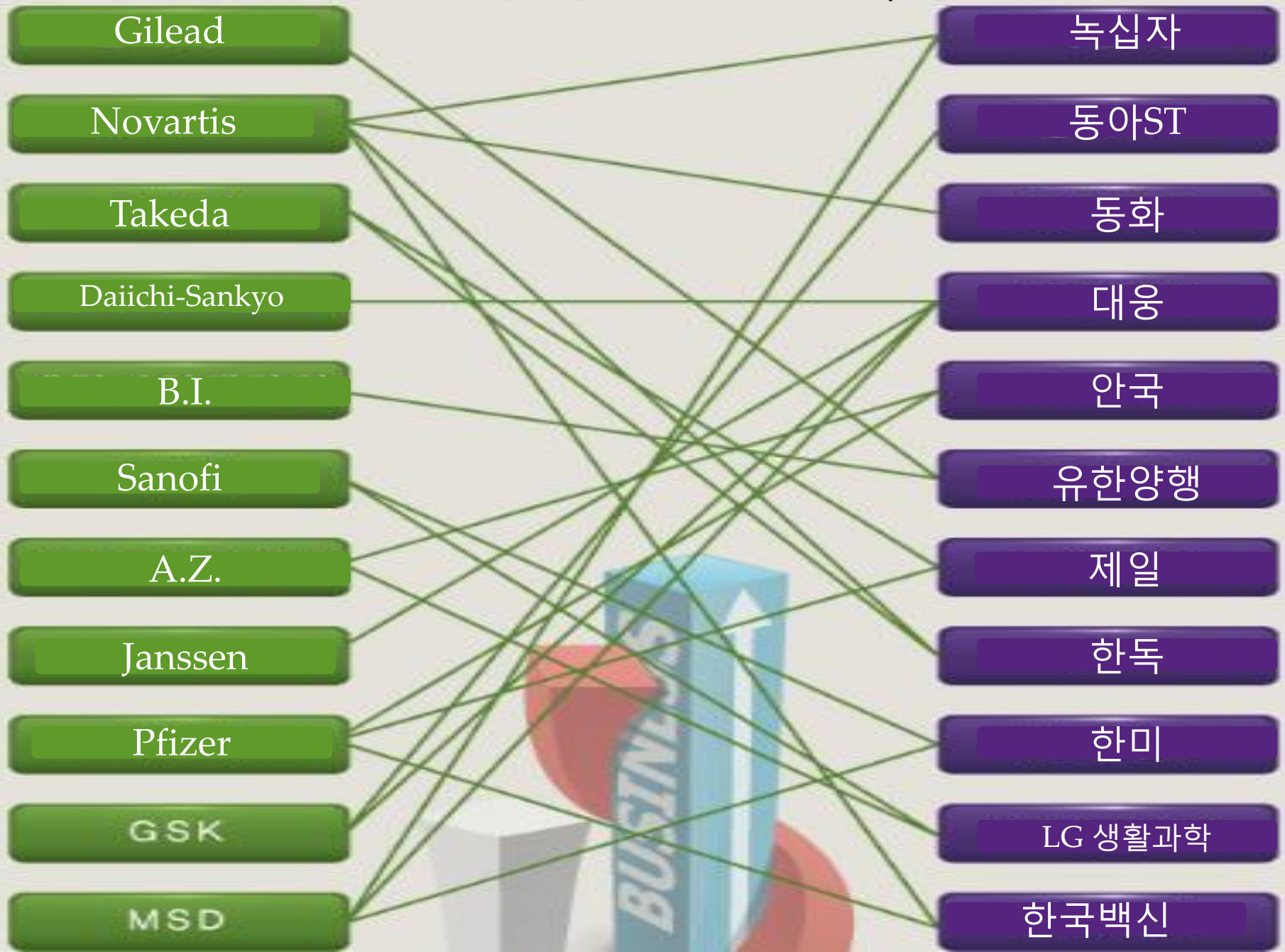
reported to FSS



		TOTAL COMPANY	Sales			Operating Margin			Net Income		
			2013	2012	Var%	2013	2012	Var%	2013	2012	Var%
		MARKET	19,432.7	18,681.9	4.0%						
		MARKET TOP10	6,251.8	6,105.9	2.4%						
		MARKET TOP20	9,727.9	9,378.9	3.7%						
Total Rank	MNC Rank										
1		YUHAN	943.6	776.5	21.5%	61.8	34.6	78.7%	86.5	80.8	7.0%
2		KOREA GREEN CROSS	888.2	811.8	9.4%	78.8	74.4	6.0%	72.0	55.6	29.5%
3		HANMI	730.1	674.0	8.3%	61.9	48.1	28.6%	50.5	28.8	75.7%
4		DAE WOONG	682.5	669.0	2.0%	71.4	36.9	93.5%	58.0	33.5	73.0%
5	1 ▲2	PFIZER	599.4	418.8	43.1%	4.8	(14.5)	→ +	11.0	(1.7)	→ +
6		CHONG KUN DANG	508.7	461.3	10.3%	82.4	57.7	42.9%	39.9	25.7	55.2%
7		DONG A ST	495.8	931.0	-46.7%	39.4	88.5	-55.5%	(85.3)	67.7	-196.4%
8	2 -	NOVARTIS	483.2	463.5	4.2%	10.0	3.8	160.4%	(9.5)	2.5	→ -
9		KWANG DONG	468.4	332.6	40.8%	44.4	36.3	22.1%	22.0	27.8	-20.8%
10		JE IL PHARM	452.0	426.8	5.9%	1.4	6.3	-78.3%	0.5	11.2	-95.7%
11	3 ▼2	GSK	440.5	473.2	-6.9%	11.7	18.9	-38.3%	26.0	26.6	-2.3%
12		LG LIFE SCIENCES	417.3	406.0	2.8%	14.4	15.2	-5.6%	3.3	8.5	-61.5%
13		IL DONG	395.2	362.8	8.9%	23.8	14.0	70.3%	6.7	17.1	-60.6%
14		JW PHARMACEUTICAL	394.2	397.1	-0.7%	25.9	9.5	173.0%	2.3	(20.4)	→ +
15	4 -	BAYER	331.6	330.9	0.2%	4.7	(1.6)	→ +	7.7	1.6	369.9%
16		HANDOK	327.9	314.6	4.2%	7.5	8.6	-13.2%	12.3	5.8	113.4%
17		BORYUNG	327.3	312.1	4.9%	19.1	3.4	467.7%	14.1	9.4	50.3%
18	5 ▲1	ASTRAZENECA	301.5	270.2	11.6%	5.7	10.3	-44.1%	11.1	9.2	21.6%
19	6 ▲1	ROCHE	271.0	263.0	3.1%	(7.0)	(4.6)	-	10.7	4.0	167.3%
20	7 ▼2	SANOFI-AVENTIS	269.4	283.7	-5.0%	20.0	8.4	138.4%	15.7	5.0	214.5%
21		DONG WHA	220.2	223.4	-1.4%	2.1	10.0	-79.4%	1.0	1.3	-22.9%
22		SHIN POONG	216.0	221.2	-2.4%	24.8	24.2	2.4%	5.5	14.3	-61.7%
23		DONG KOOK	213.1	180.3	18.2%	24.5	27.1	-9.4%	16.7	22.3	-24.9%
24	8 ▲1	BERNABIOTECH	208.9	186.5	12.0%	55.7	(5.6)	→ +	75.4	(10.4)	→ +
25	9 ▲2	BOEHRINGER INGELHEIM	205.0	175.3	17.0%	4.8	4.6	3.5%	1.5	1.9	-20.2%
26	10 -	ROCHE DIAGNOSTICS	194.2	183.4	5.9%	8.3	9.0	-8.3%	5.9	7.0	-15.4%
27		SAM JIN	192.0	185.7	3.4%	30.1	17.3	73.8%	7.9	10.6	-25.9%
28	11 ▼3	JANSSSEN	191.9	218.6	-12.2%	4.6	7.4	-37.6%	0.8	2.6	-67.4%
29	12 ▼1	BAXTER	166.0	158.6	4.6%	7.4	4.4	69.2%	4.4	2.9	55.2%
30		KYOUNG BO	162.2	152.8	6.1%	24.6	22.5	9.0%	17.0	14.5	16.9%
31		DAE WON	158.9	138.2	15.0%	15.5	13.5	15.2%	12.2	9.8	25.3%
32		HUONS	158.2	135.5	16.7%	27.9	14.8	89.1%	22.8	7.2	217.5%
33		YUNG JIN	156.6	137.7	13.8%	6.9	3.3	111.7%	11.7	1.8	554.5%
34	13 ▲1	ASTELLAS PHARMA	156.5	150.1	4.3%	10.5	5.5	92.3%	(0.4)	3.0	-
35	14 ▼2	ABBOTT	154.8	169.3	-8.5%	(1.1)	(13.0)	-	5.2	(14.9)	→ +
36		AHN GOOK	154.1	140.8	9.4%	10.1	5.5	84.6%	7.1	3.6	97.5%
37	15 -	FRESENIUS MEDICAL CARE	149.2	138.7	7.5%	12.9	9.1	41.5%	21.5	7.1	205.1%
38		DAE WOONG BIO	148.9	138.0	7.9%	13.2	12.5	5.7%	10.4	10.7	-3.0%
39	16 -	MERK	146.0	136.6	6.9%	4.4	(0.4)	→ +	6.4	3.7	71.5%
46	17 ▲4	TAKEDA	121.4	62.1	95.5%	(7.0)	(6.9)	-	(6.5)	(0.4)	-
47	18 -	OTSUKA	121.2	115.2	5.3%	9.0	6.1	47.8%	5.0	6.5	-23.1%

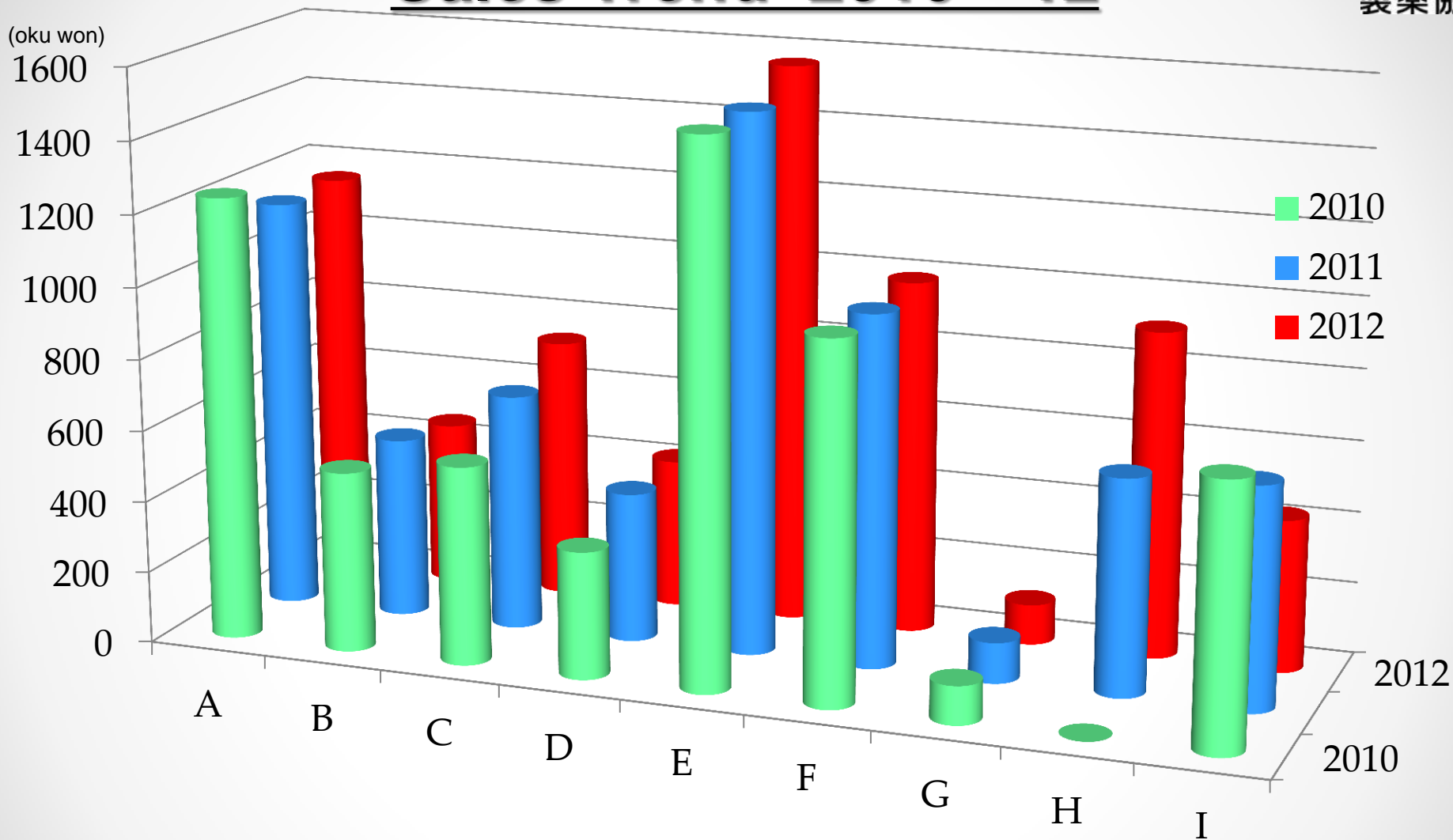
MNC + Local Alliance Chart

2014. 2.20. Daily Pharm



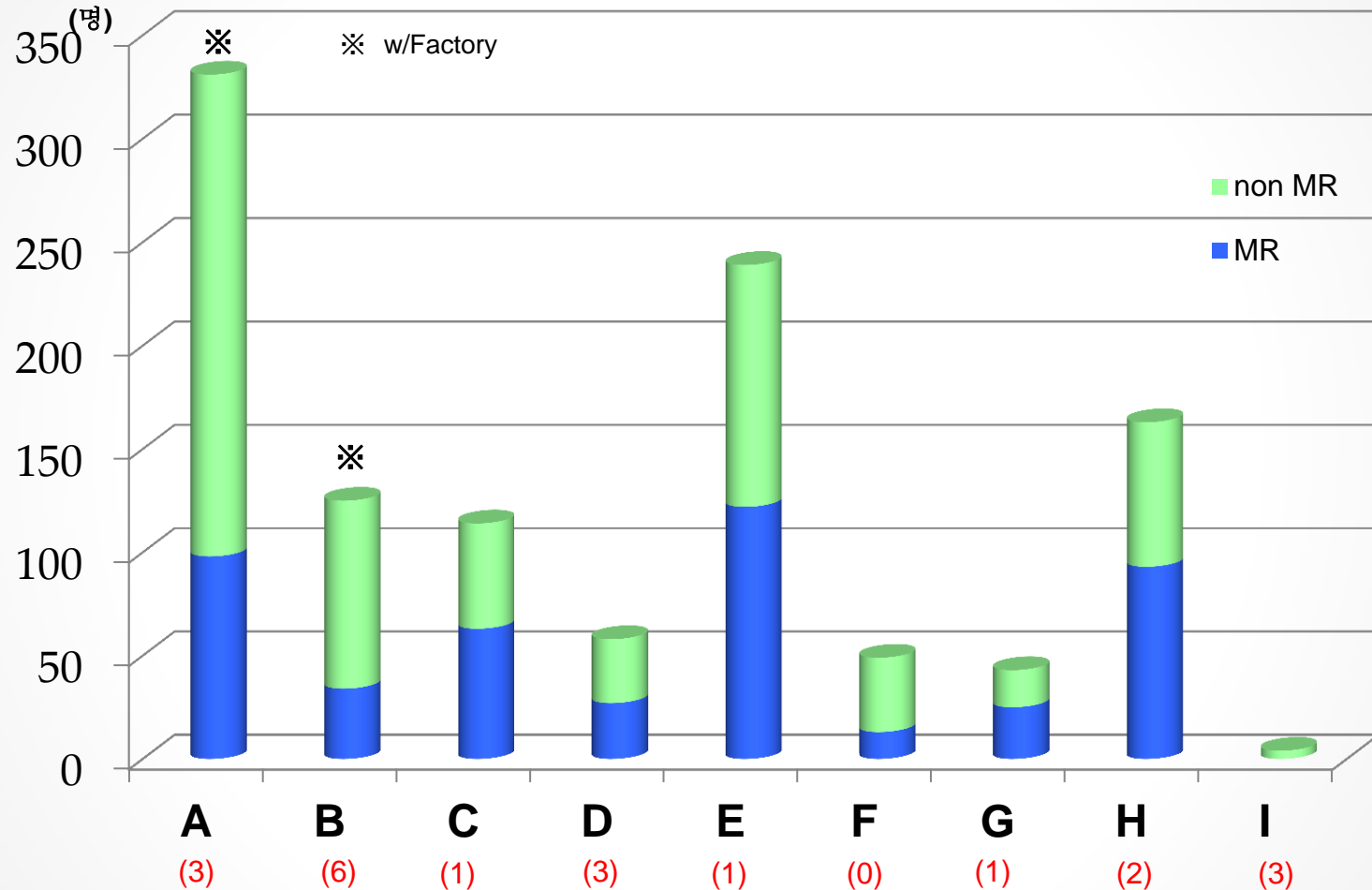
- 제약협회 국제위원회 소개
- 한국 의약품 시장 현황
- 주한 일본 기업 활동 상황

Sales Trend 2010~12



Total :6,767 억원 (2012)

Total Employees & MR 2012



(): No. of Japanese staff

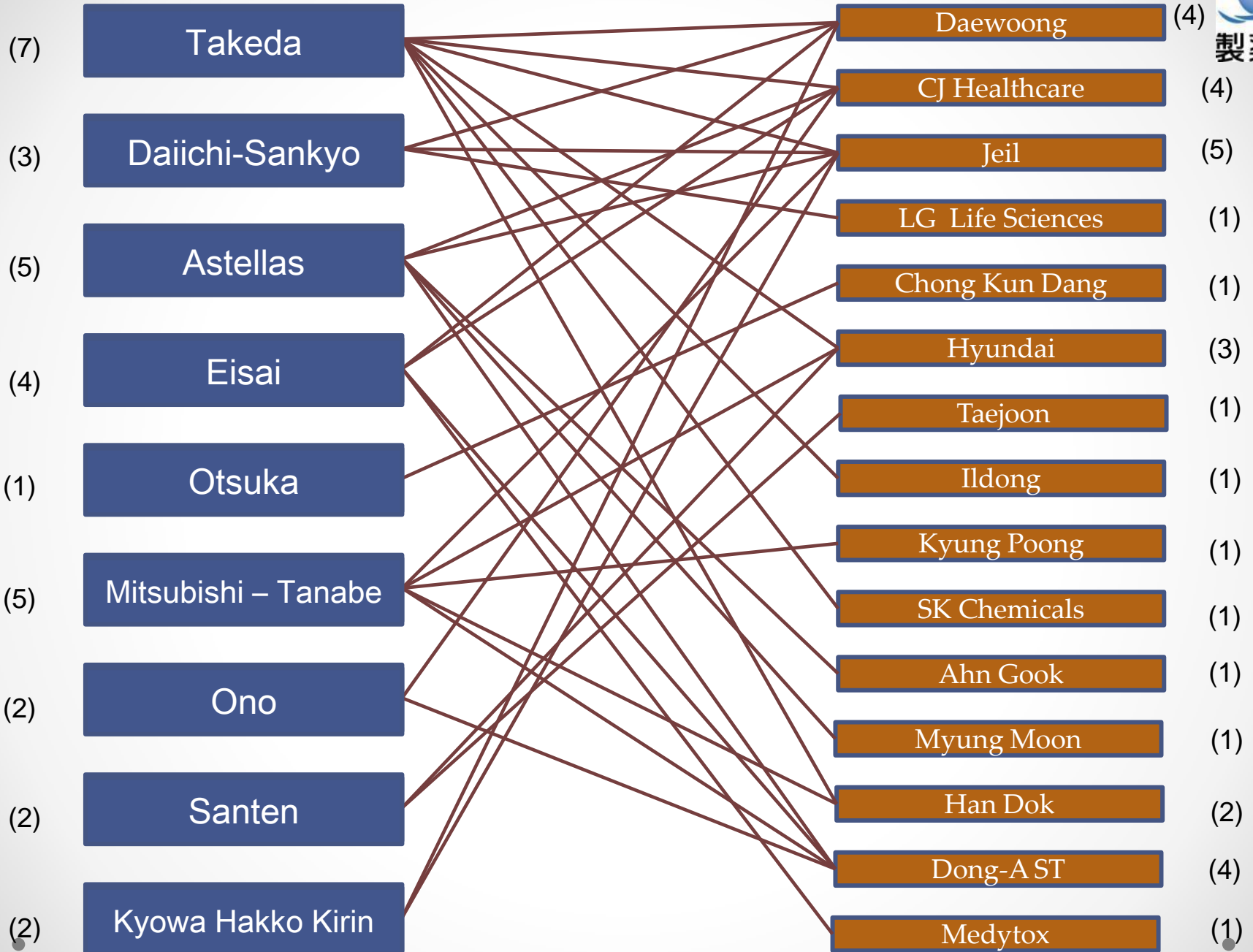
Total employee : 1,192 ≒ 2.3% of the industry

Total MR number : 475 ≒ 1.6% of the industry

Total Sales : 6,800 億円 ≒ 3.6% of the industry

Local Alliance Chart

() No. of alliance



Korea Japanese Pharmaceutical Association



Home > News & Notice > KJPA Notice

News & Notice

Industry News

KJPA Notice >>

KJPA Notice

제목 + 내용

No.	제 목	첨부파일	작성자	작성일	조회수
74	KJPA Website 개설하였습니다.		Secretariat	2013.05.11	32
73	KJPA Website 開設しました。		Secretariat	2013.05.11	34

1

About KJPA

KJPA는?

조직도 >>

회원사

유관웹사이트



President and CEO
Dae-Jung Kim

Organization

CEO 회장

사무국

Members 회원사 (정회원/준회원)

{ No. of Member Company 10
No. of Associate Member 10

Group 분과회

Sub Committee

약가제도 연구위원회 (PRRC)	RA연구위원회 (RARC)	CP연구위원회 (CPRC)	MA연구위원회 (MARC)
Pricing & Reimbursement	Regulation Affairs	Compliance	Medical Affairs

한국 정부에 대한 제언 by KJPA 2013년 SJC건의사항

- 존속기간이 연장된 특허권 일부에 대한 효력 범위의 적정화
- 의약품 허가-특허 연계제도의 특허권 등재 심사 기준의 적정화
- 특허권 존속 연장제도의 외국 임상시험 기간 가산
- 신약평가 시에 평가기준에 대한 탄력적인 운영
- 임상자료가 불충분한 신약에 대한 평가 기준완화
- 약가 협상 지침 제11조 1항 6호 관련, 3개국가 이하로 제출 할 경우 협상 참고가격의 최저 80%이하로 하는 규정 삭제 요청
- 식약처의 전자민원 창구 신청시 처리 기한에 대한 개선