

Annual Report for 2003 (Jan-Dec)

February 26, 2004

Japanese CRO Association

JCROA

Organization of JCROA

Total Number of Members: 27 companies

{ Regular Members: 16 Companies
Associate Members: 7 companies
Supporting Members: 4 Companies

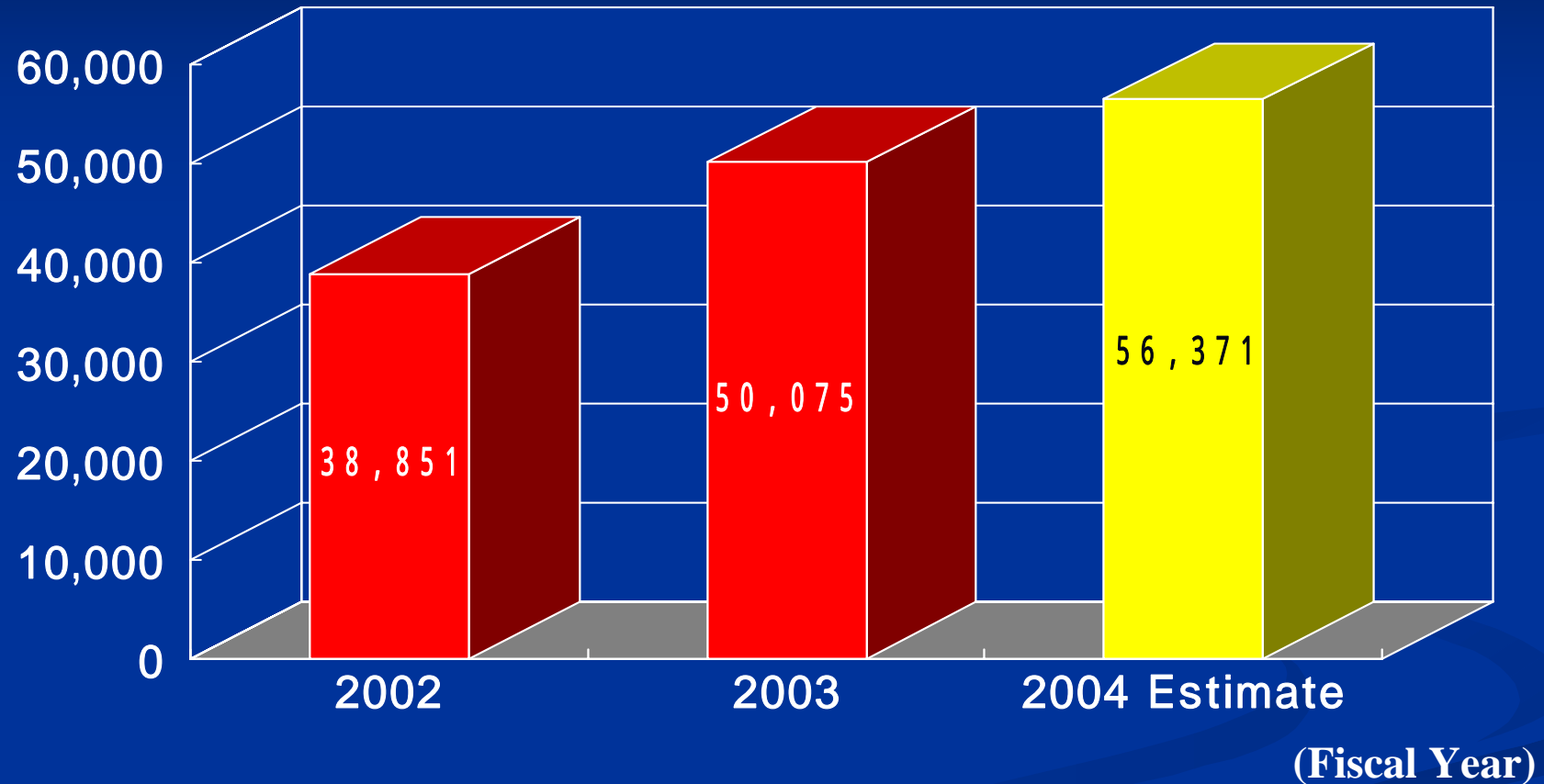
Note) This annual report is collected from the following data.

* Data of 26 members excluding SOGO Clinical Pharma.

** Data of 10 affiliated companies of JCROA members those who exclusively provide SMO/CRC services. (Page 11 and 12)

JCROA Movement of Sales Amount

(JYN Million)

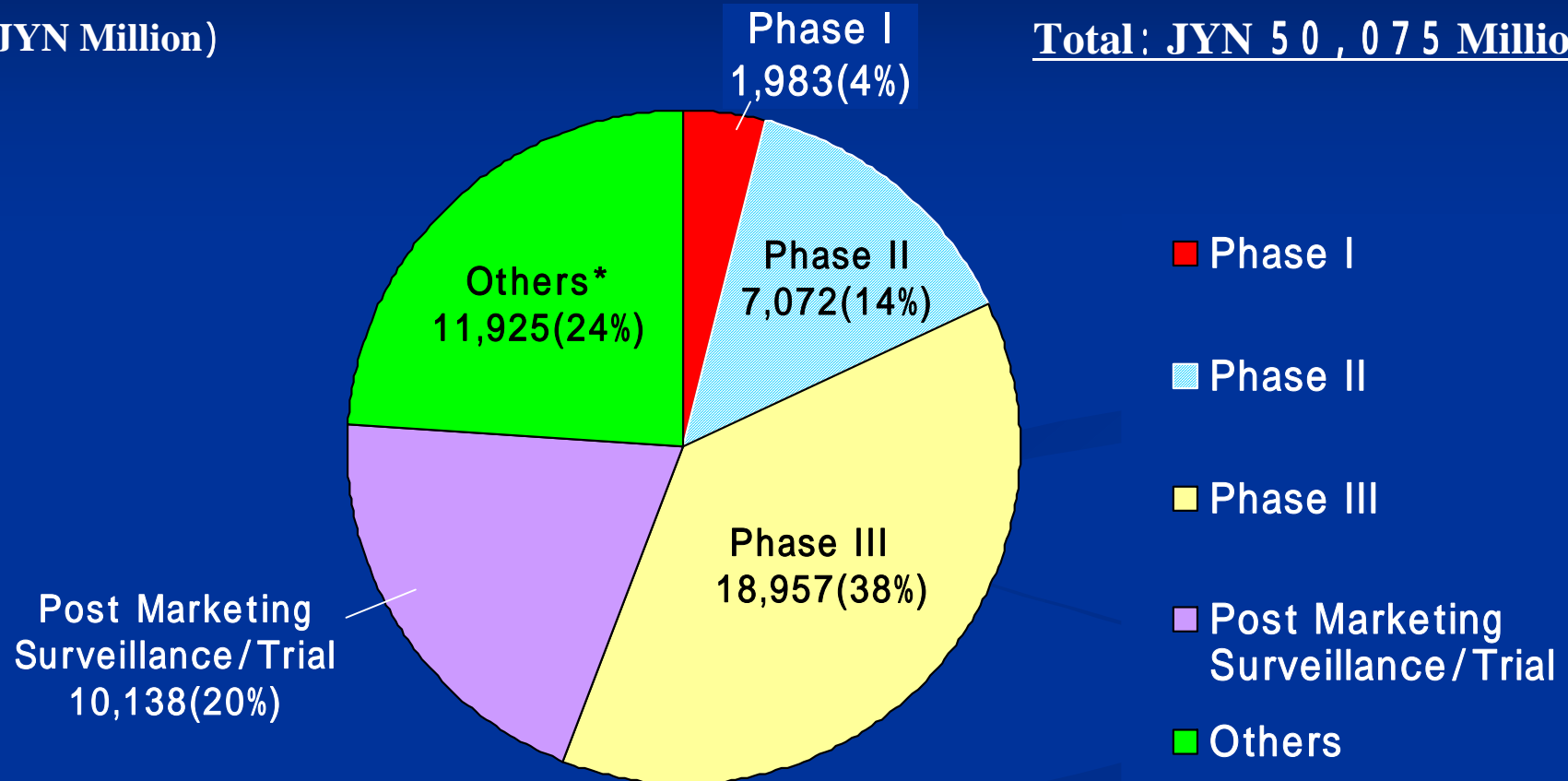


Note) Data of 26 companies in 2003 and 2004
Data of 25 companies in 2002

JCROA 2003 Sales by Phases

(JYN Million)

Total: JYN 50,075 Million

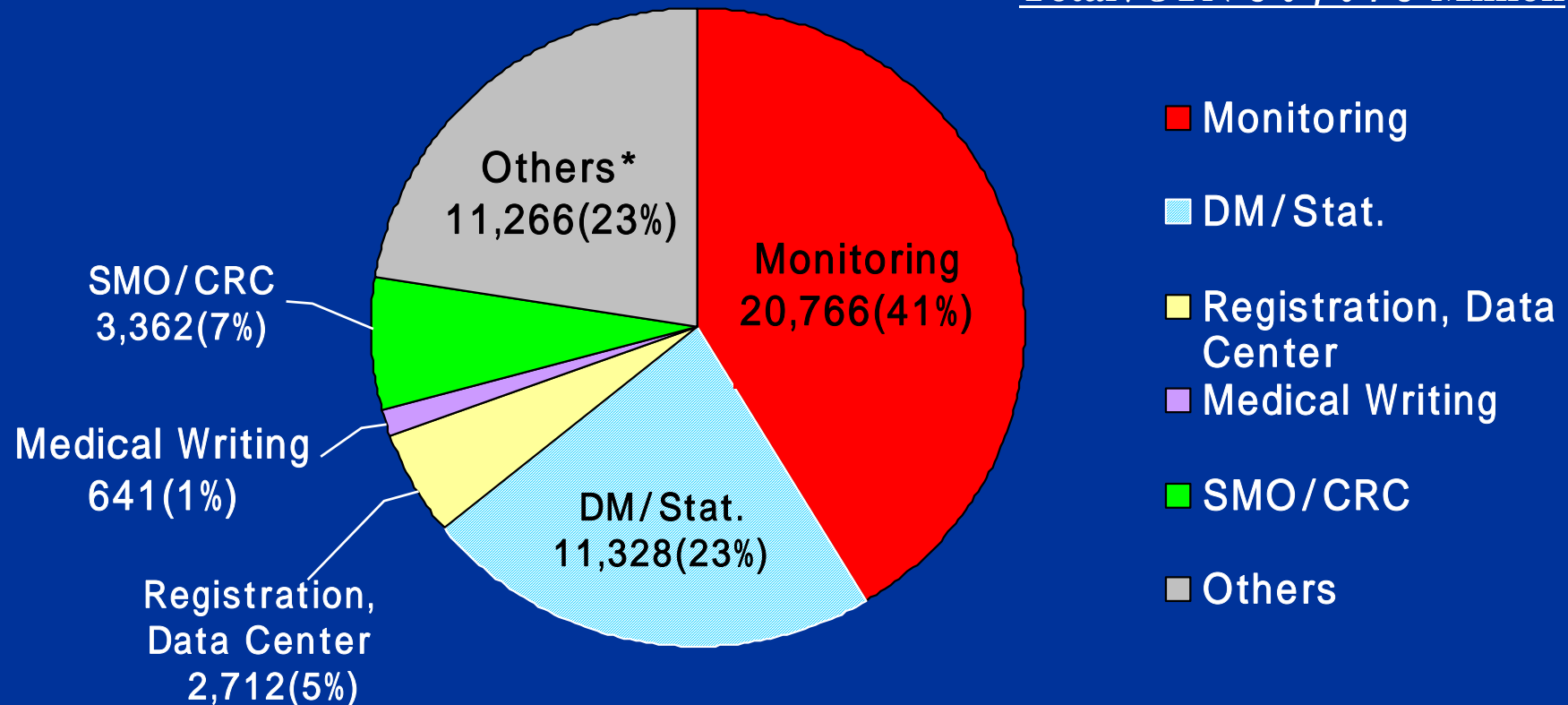


* Others : Total Sales amount of 1 company, Medical Devices, Food/Supplement, System Development, Consulting, Training, and etc.

JCROA 2003 Sales by Services

(JYN Million)

Total: JYN 50,075 Million

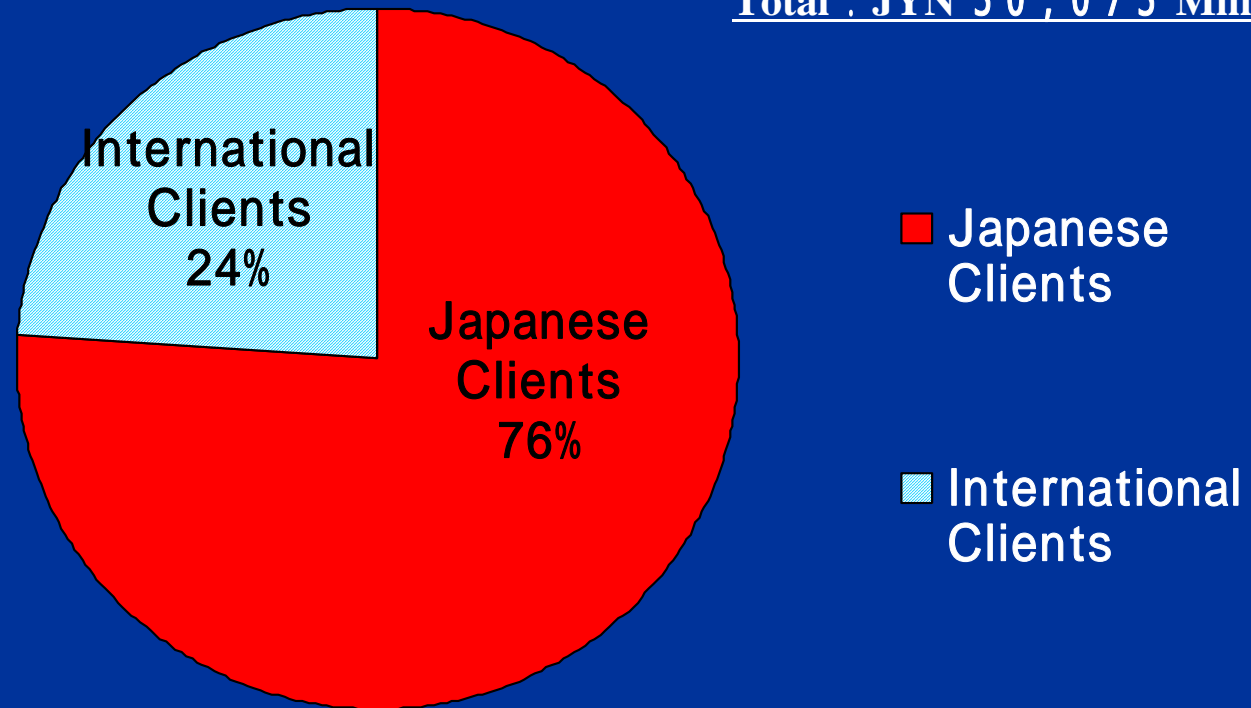


* Others : Total Sales amount of 1 company, Medical Devices, System Development, Training, and etc.

JCROA 2003 Sales by Clients

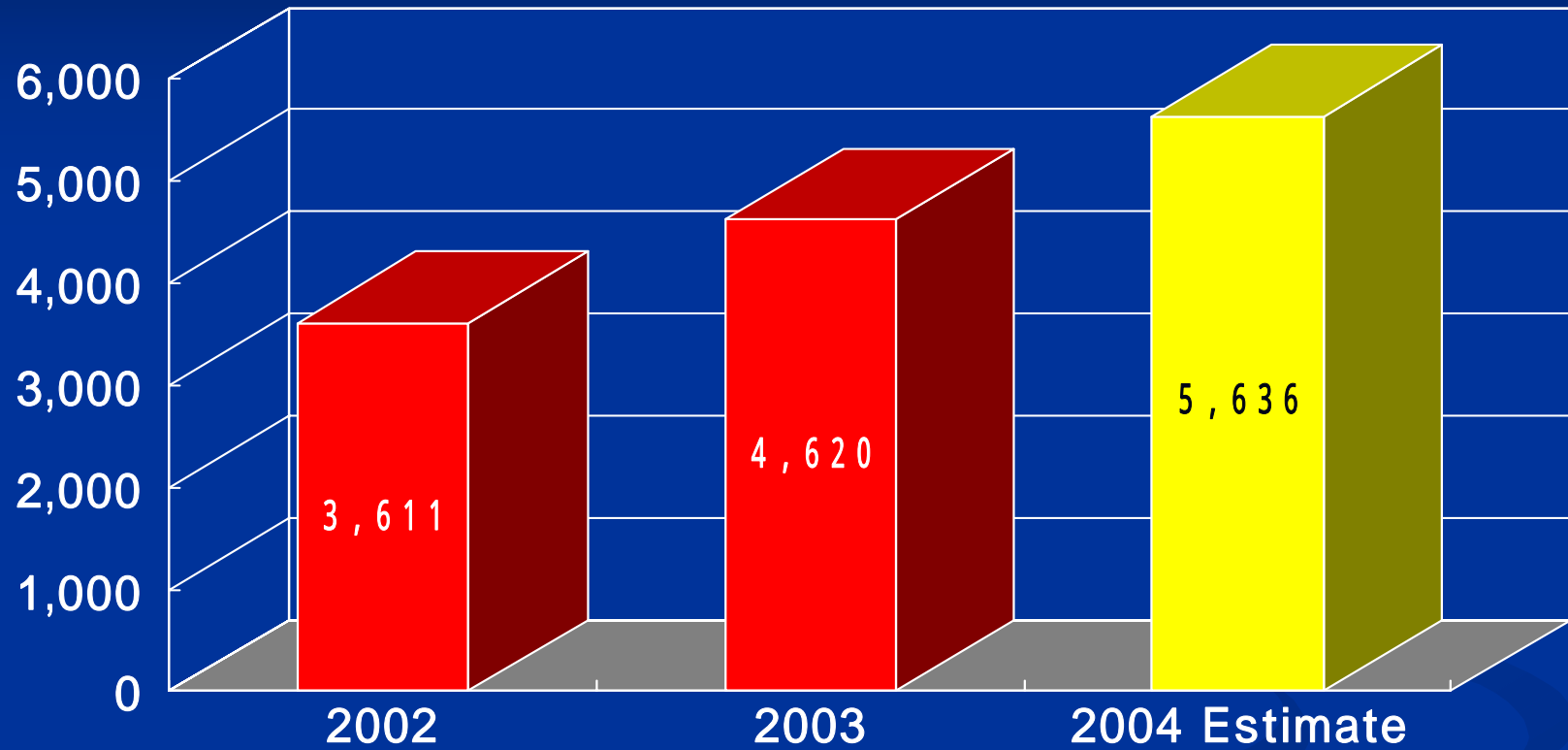
(Based on Sales)

Total : JYN 50 , 075 Million



JCROA Movement of Employees

(# of Employees)



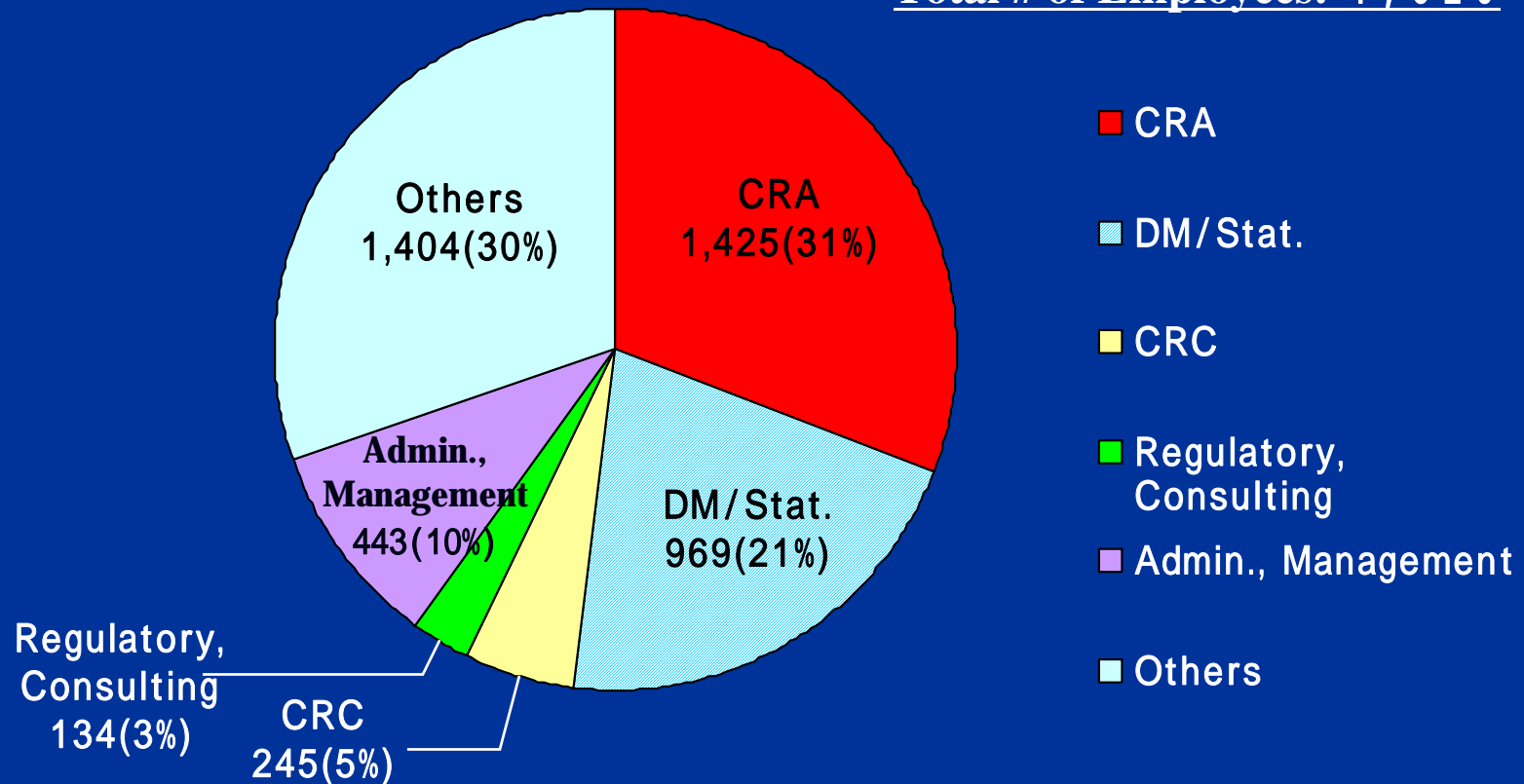
Note) Data of 26 companies in 2003 and 2004
Data of 25 companies in 2002

JCROA

Employees Breakdown by Services in 2003

(# of Employees)

Total # of Employees: 4,620

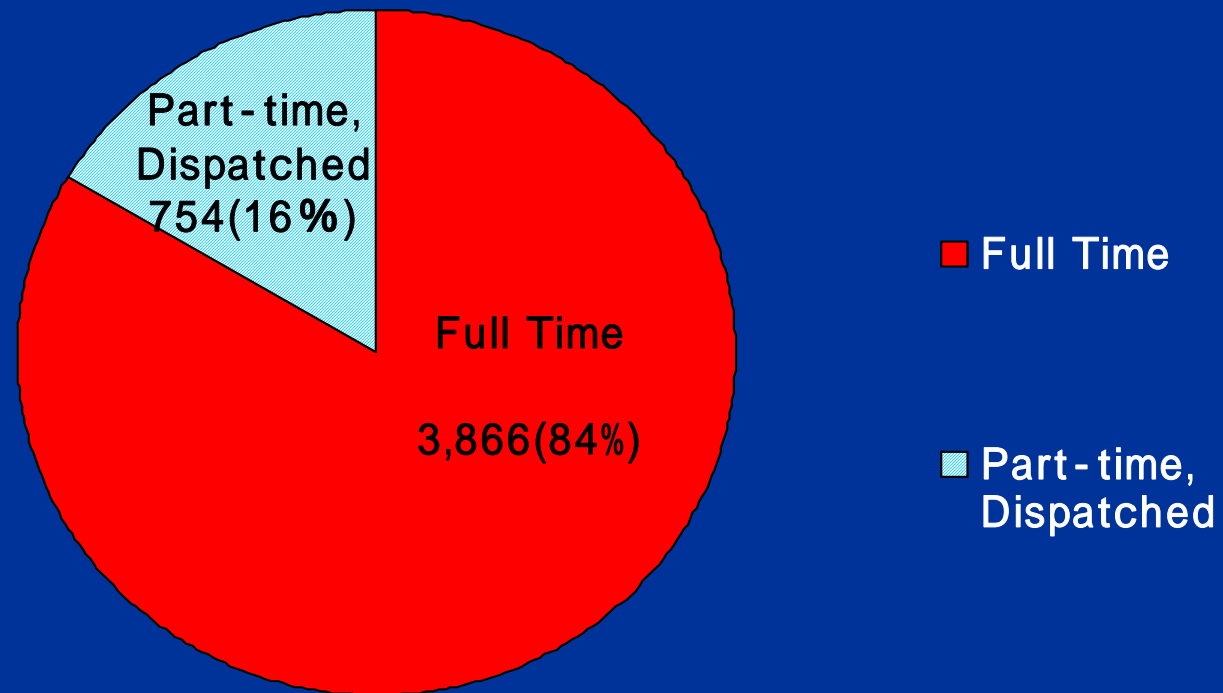


* Others : Total # of Employees of 1 company, Auditors, Trainers, System Engineers, Project Management, and etc.

JCROA Employment in 2003

(# of Employees)

Total # of Employees: 4,620



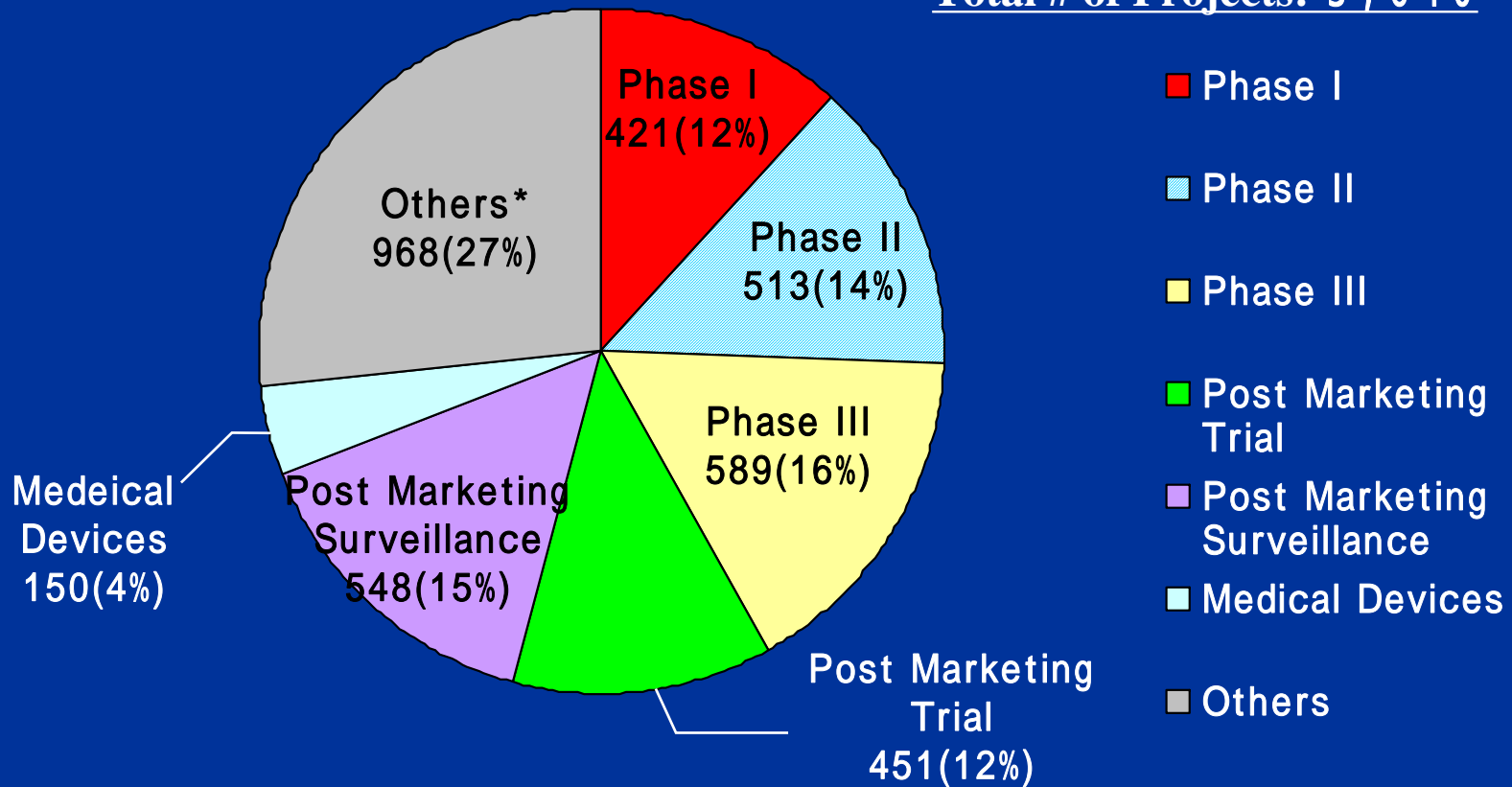
JCROA

Outsourced Projects** by Phases in 2003

**1 project=1 Service per Protocol

(# of Projects)

Total # of Projects: 3,640



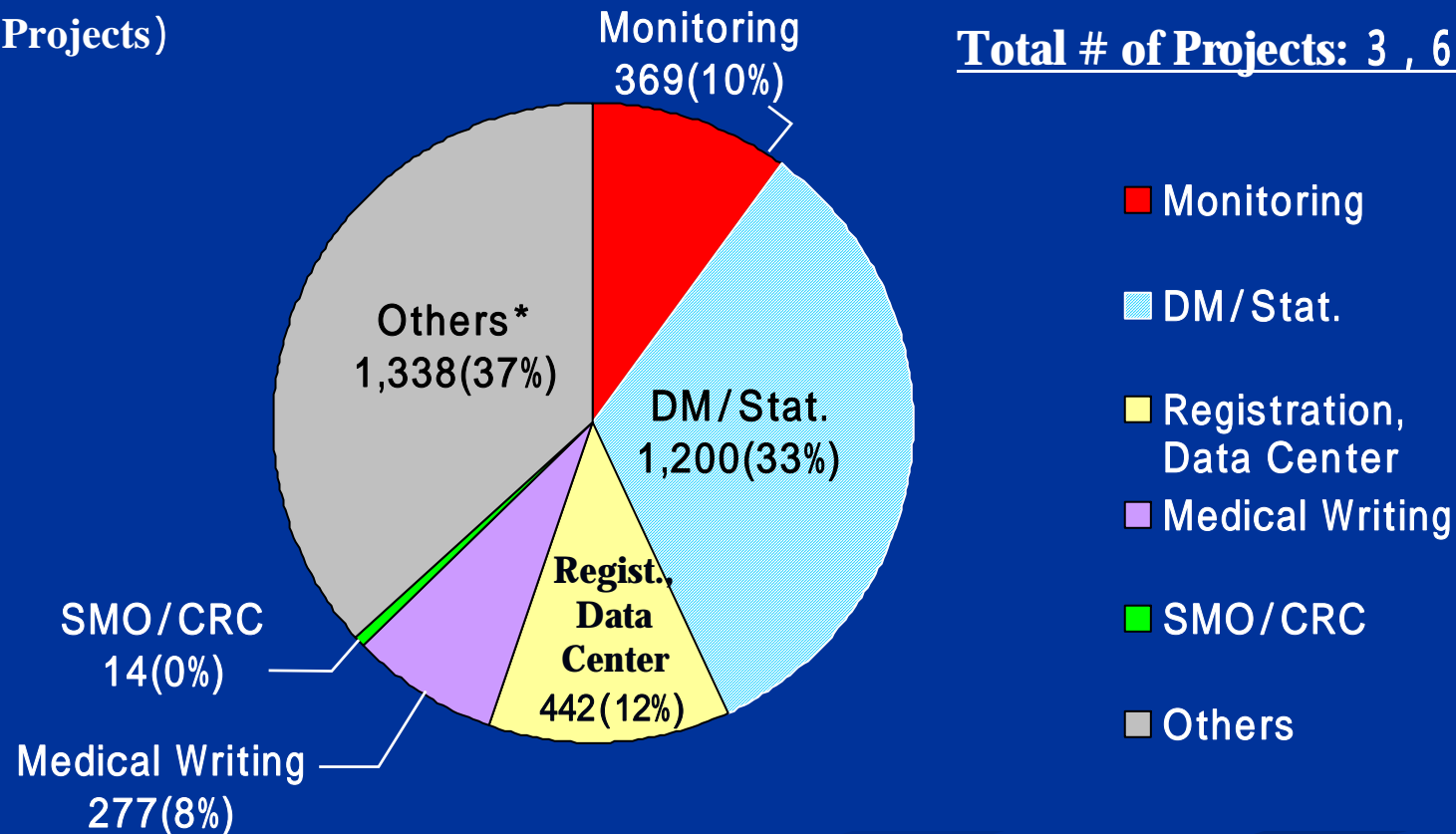
* Others : Total # of consigned projects of 1 company, Studies for Food/Supplement, Epidemiology Studies, Scientific Studies, and etc.

JCROA Breakdown of Outsourced Projects** by Services in 2003

**1 project=1 Service per Protocol

(# of Projects)

Total # of Projects: 3,640



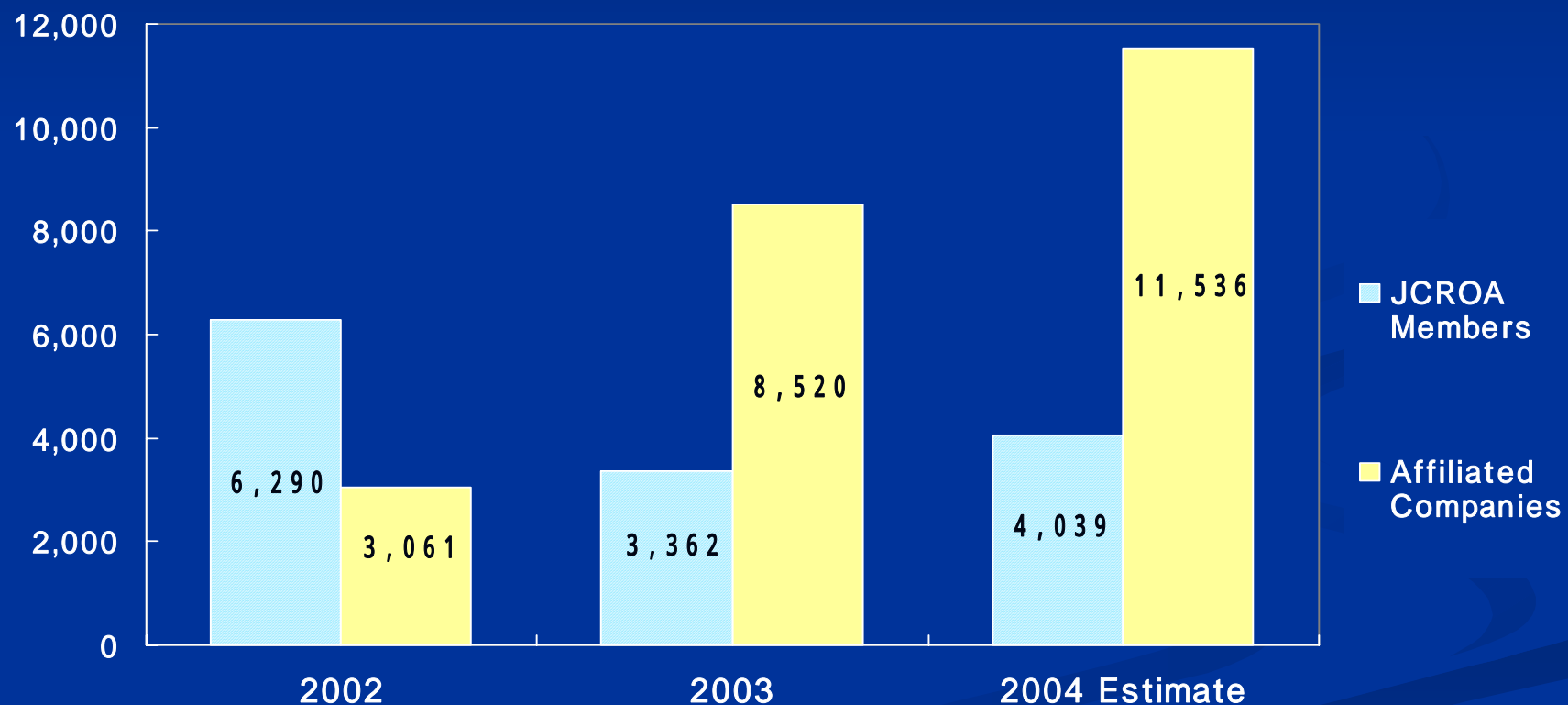
* Others : Total # of consigned projects of 1 company, System Development, Consulting, Audit, Training, Scientific Studies, and etc.

JCROA

Movement of Sales Amount toward SMO/CRC Services

JCROA Members : Affiliated Companies

(JYN Million)



* Data of 7 JCROA Members and 6 Affiliated Companies in 2002

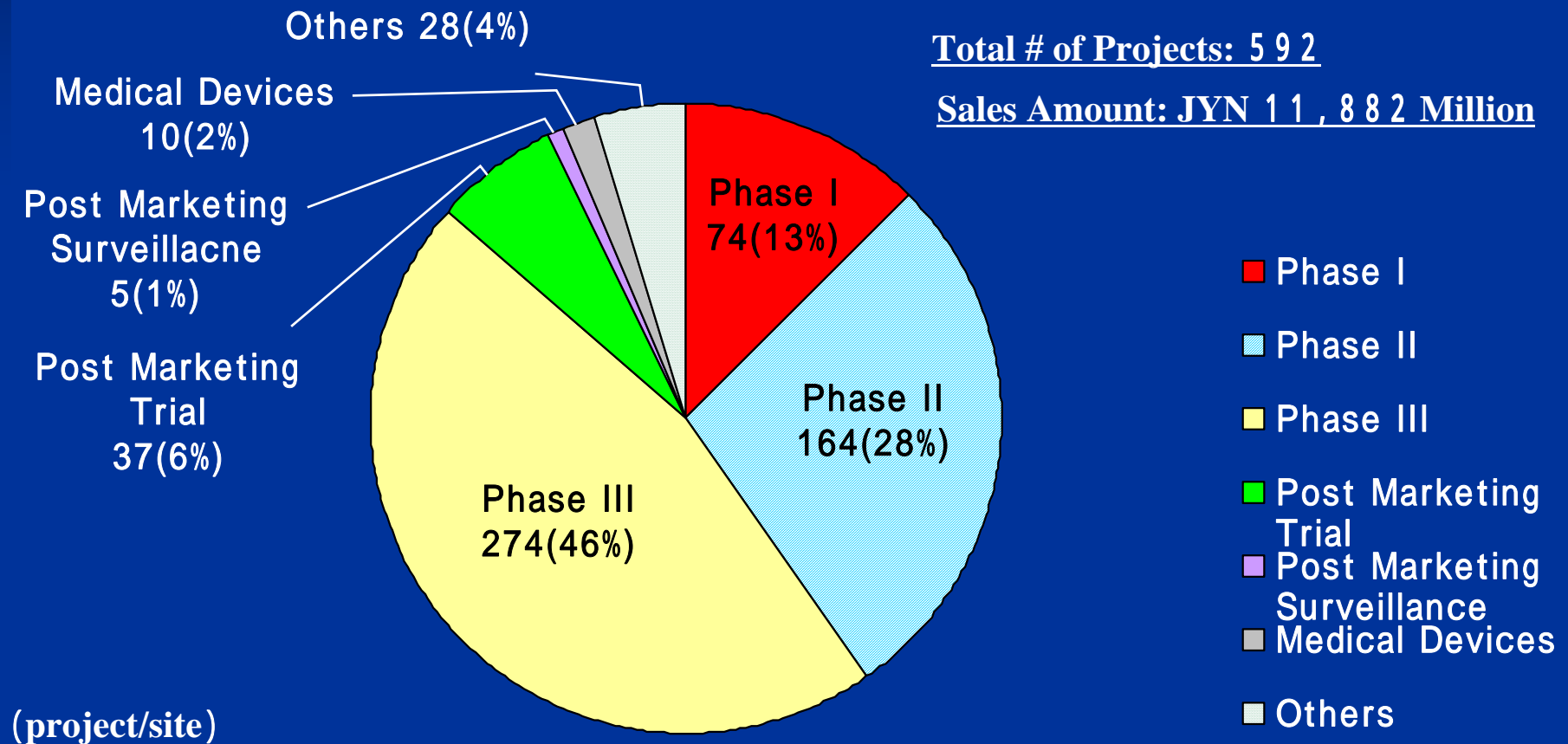
Date of 4 JCROA Members and 10 Affiliated Companies in 2003 and 2004

JCROA Outsourced Projects** by Phases SMO/CRC Services in 2003

**1 project=1 project per site

Total # of Projects: 592

Sales Amount: JYN 11,882 Million



* Total Data of 4 Members and 10 Affiliated Companies