



Annual Report for Fiscal Year of 2008 (Jan-Dec)

February 26, 2009

Japan CRO Association

2008 Organization of JCROA

Total Number of Members: 41 companies

{ Regular Member: 20 companies
Associate Member: 7 companies
Supporting Member: 14 companies

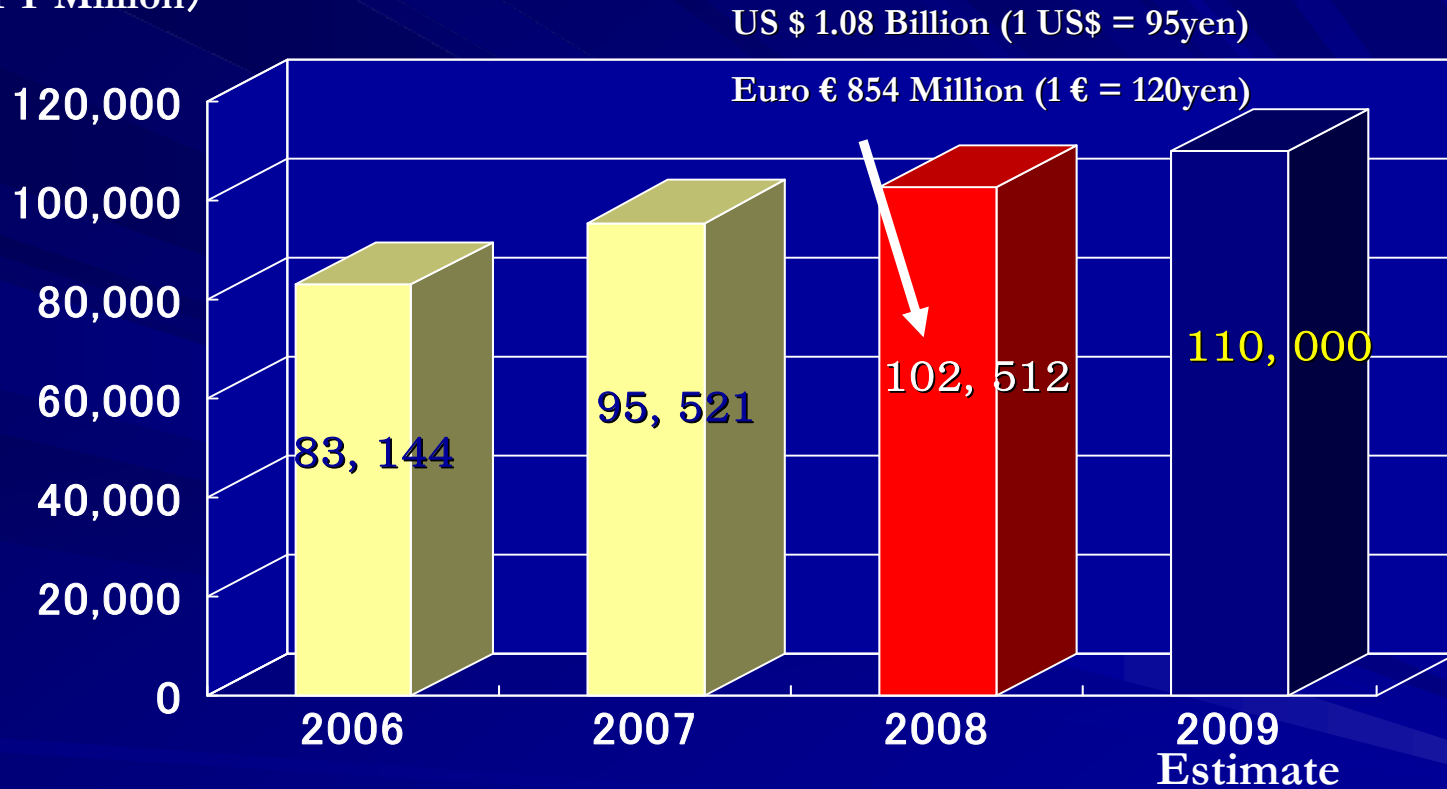
(Note)

- * This report is collected from 39 of the above 41 companies concerning providing services on 1) Clinical Development, 2) Medical Devices Development, 3) Food & Supplement Development, 4) SMO/CRC, 5) Pre-Clinical, and 6) Others.
- * In case any of the data is imperfect due to lack of information, the data is adjusted to the estimated data based on the average of the available information.
- * Data of 31 affiliated companies^{##} of JCROA is available on Page 12.

##) Affiliated Companies have capital relation with the JCROA members.

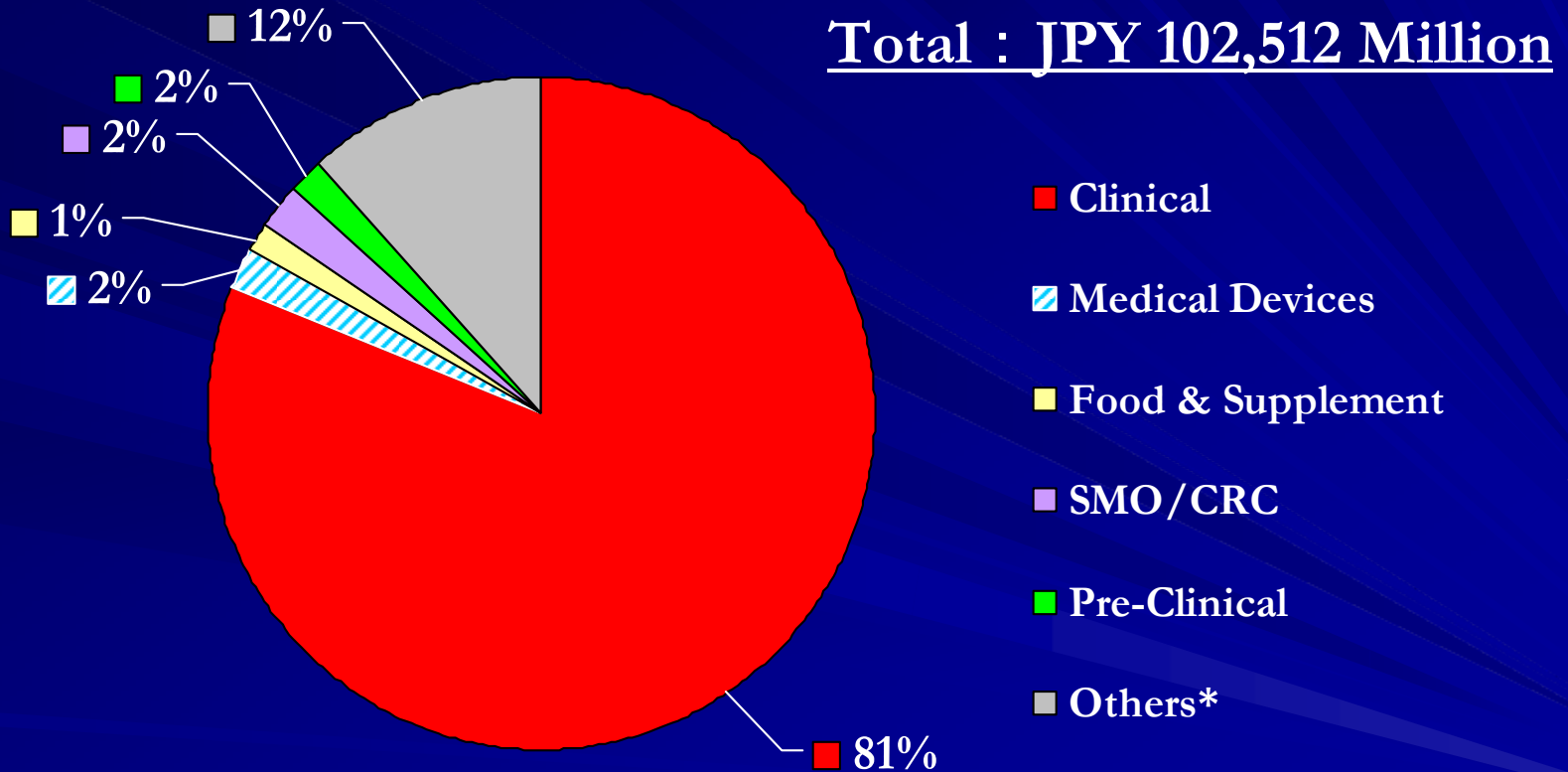
Movement of Sales Amount*

(JPY Million)



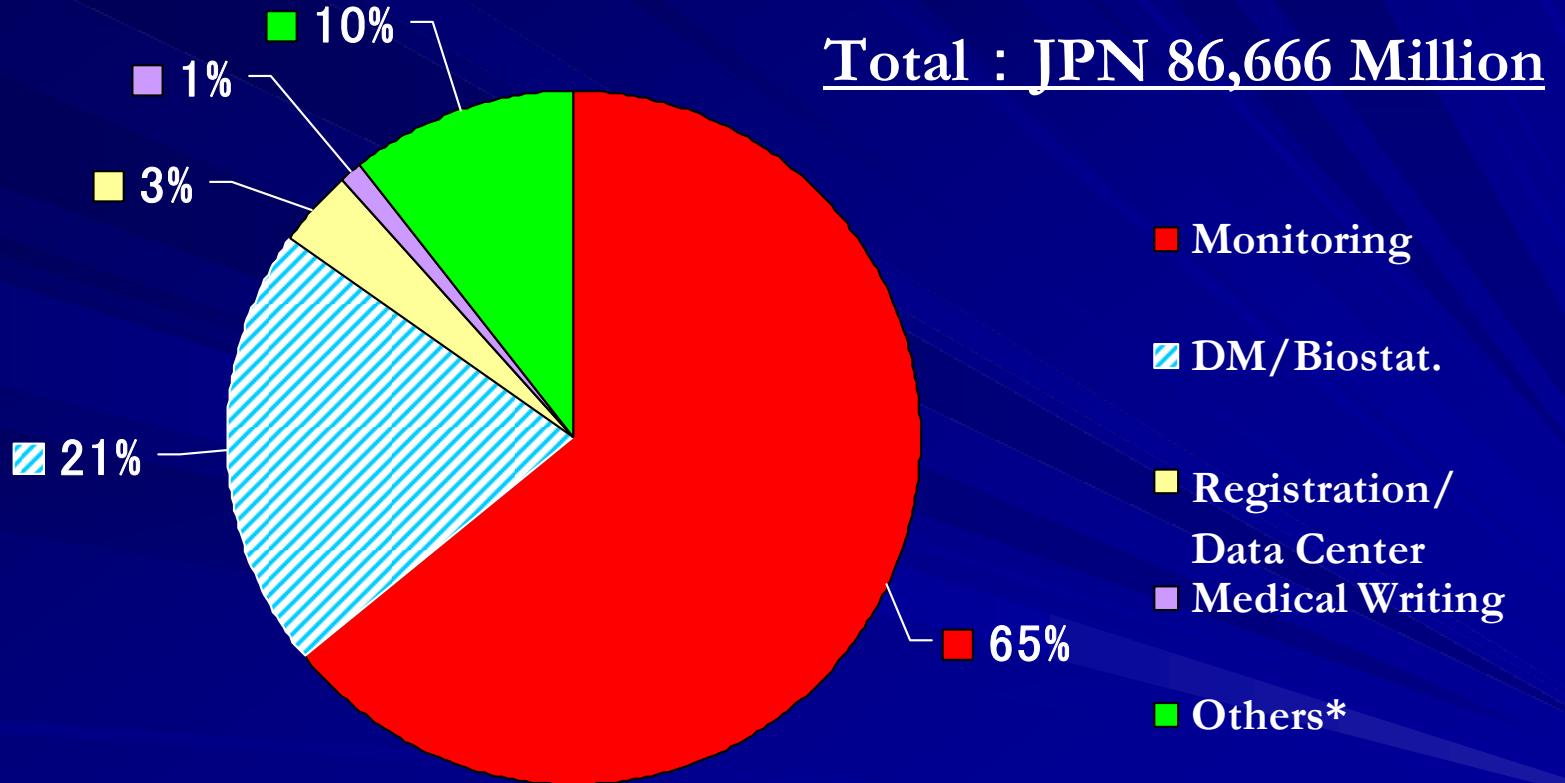
* Data of 39 companies in 2006. Data of 40 companies in 2007.

2008 Sales Breakdown by Fields



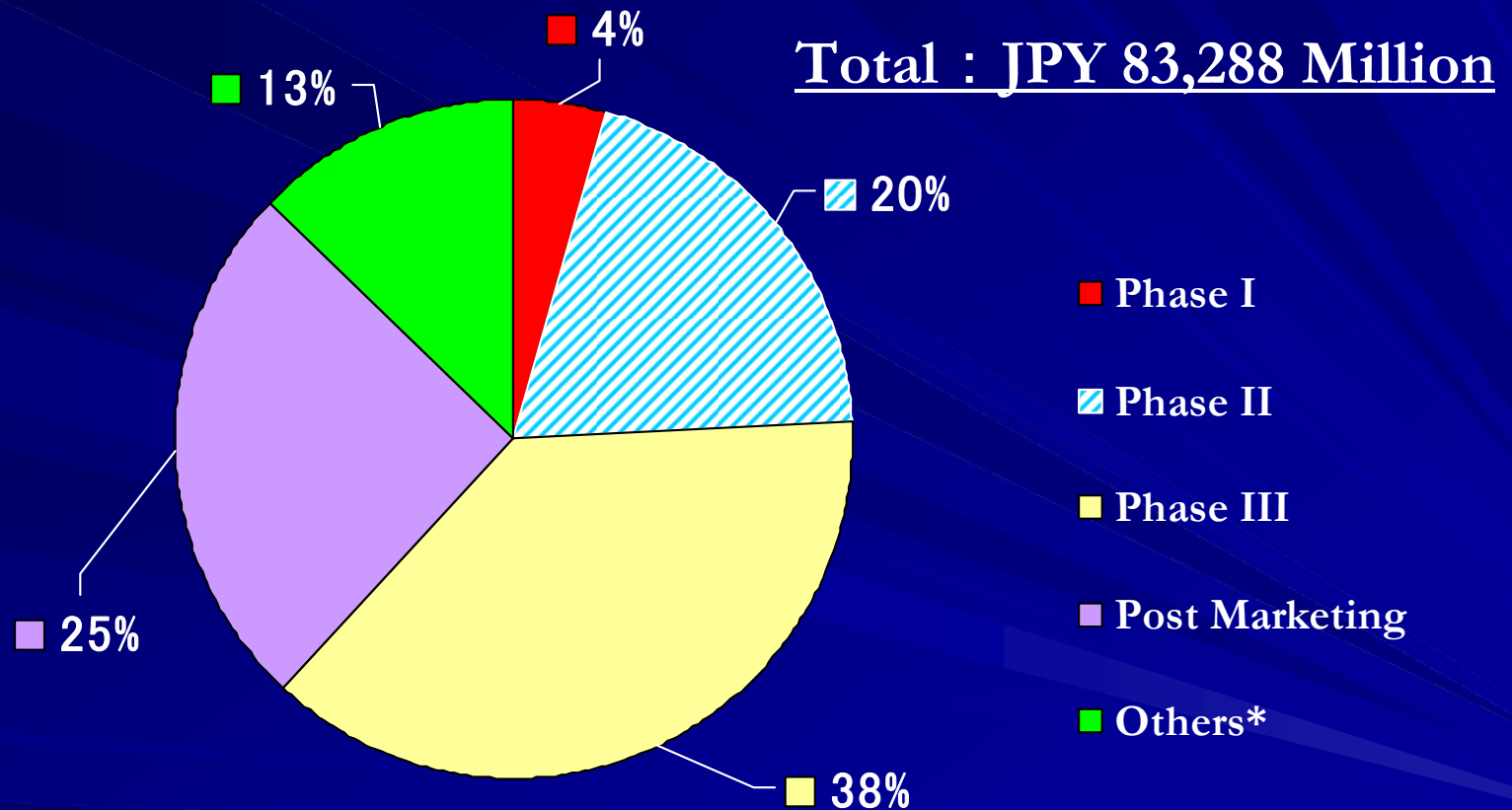
*Others: Medical exam. related to clinical trials, Temp agencies, Bioequivalent studies, System development for EDC and others, Quality Control, Education/Training, Academic investigation, and etc. (In Sales Amount Order)

2008 Clinical/Devices/Food & Supplement Sales Breakdown by Services



*Others: Medical exam. related to clinical trials, Temp agencies, System development for EDC and others, Bioequivalent studies, Academic investigation, IND for Medical Devices, Food & Supplement studies, and etc. (In Sales Amount Order)

2008 Clinical Development Sales Breakdown by Phases

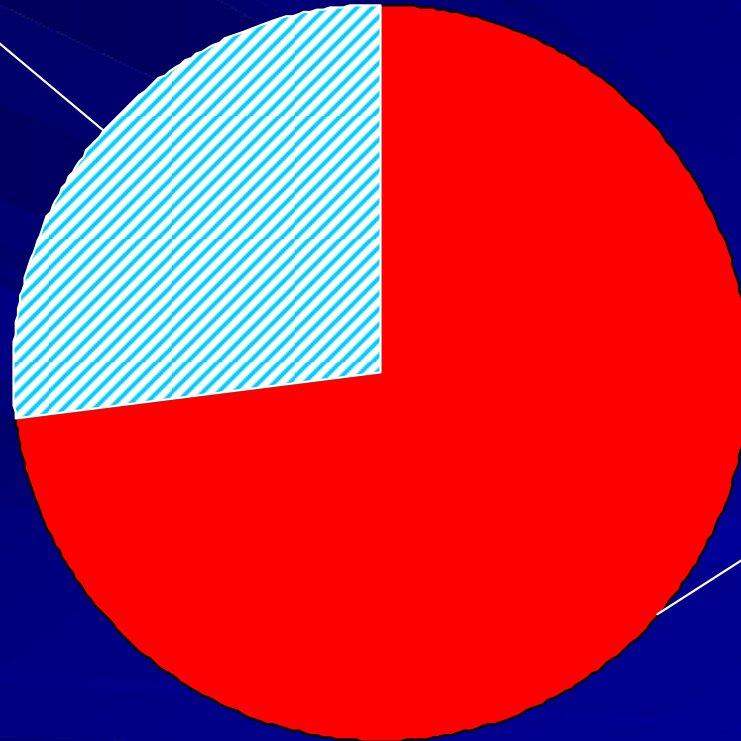


*Others: System development for EDC and others, Bioequivalent studies, Academic investigation, Education/Training, Safety report, Quality control, and etc. (In the Number of Items Order)

2008 Sales Breakdown by Clients

Total: JPY 102,512 Million

■ International
Clients
27%

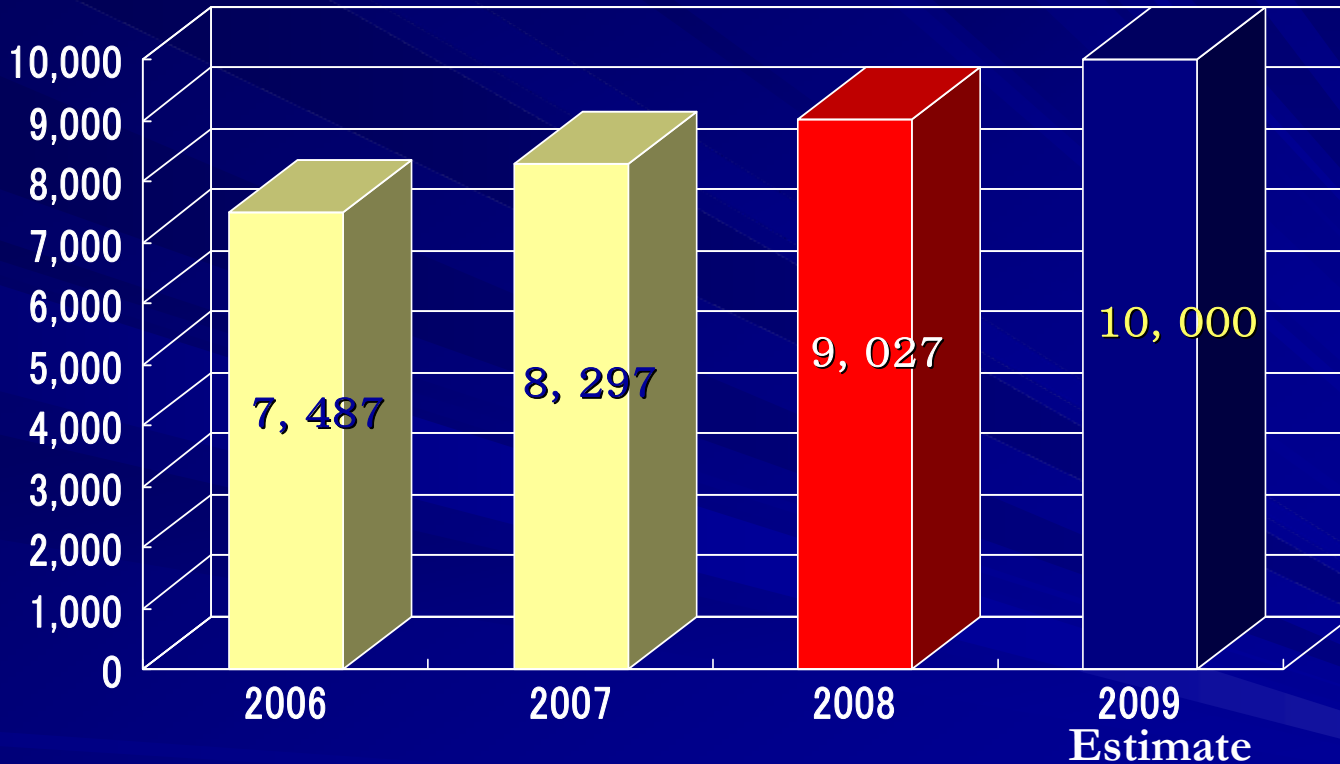


■ Japanese
Clients
73%

■ Japanese
Clients
■ International
Clients

Movement of Number of Employees*

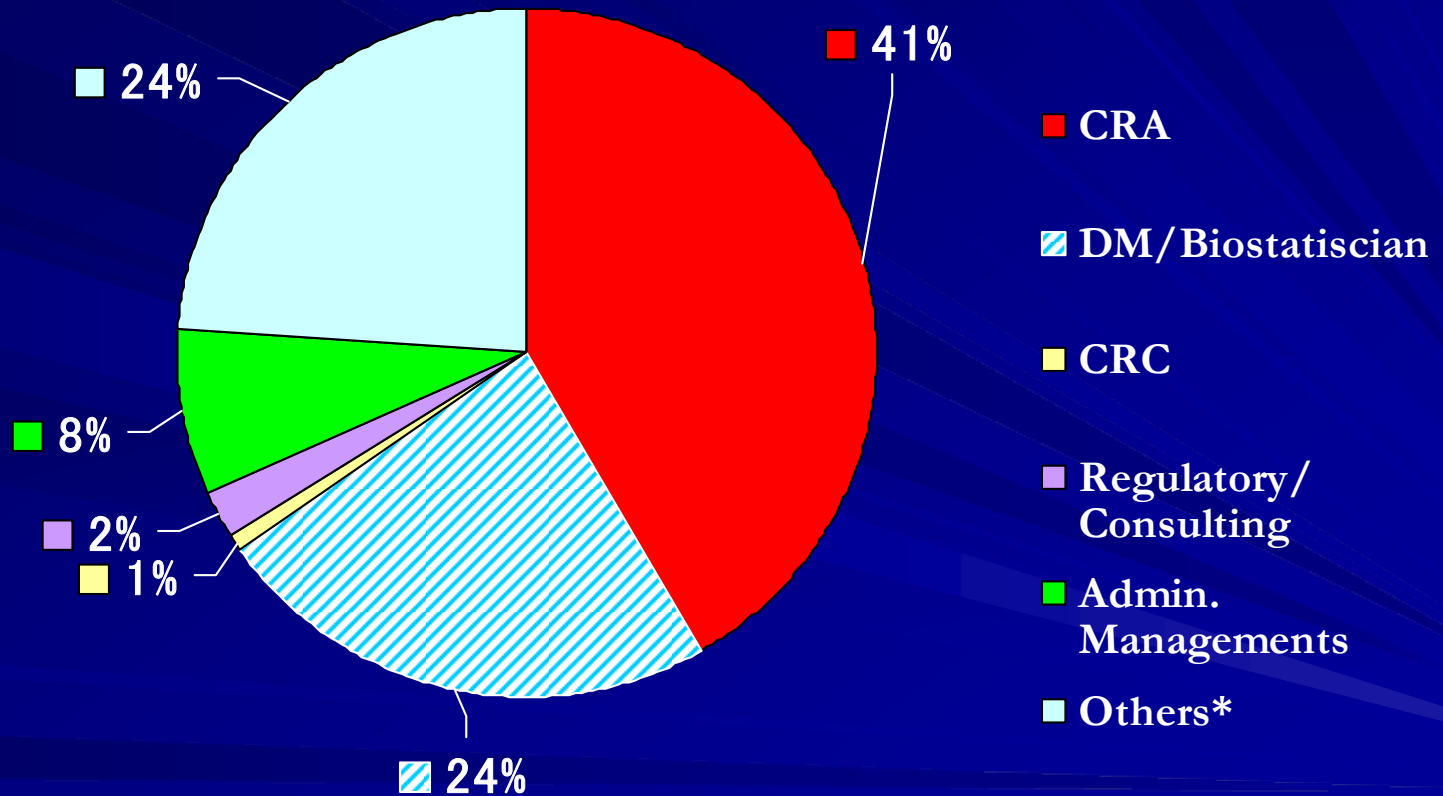
(# of Employees)



* Data of 39 companies in 2006. Data of 40 companies in 2007.

2008 Employees Breakdown by Services

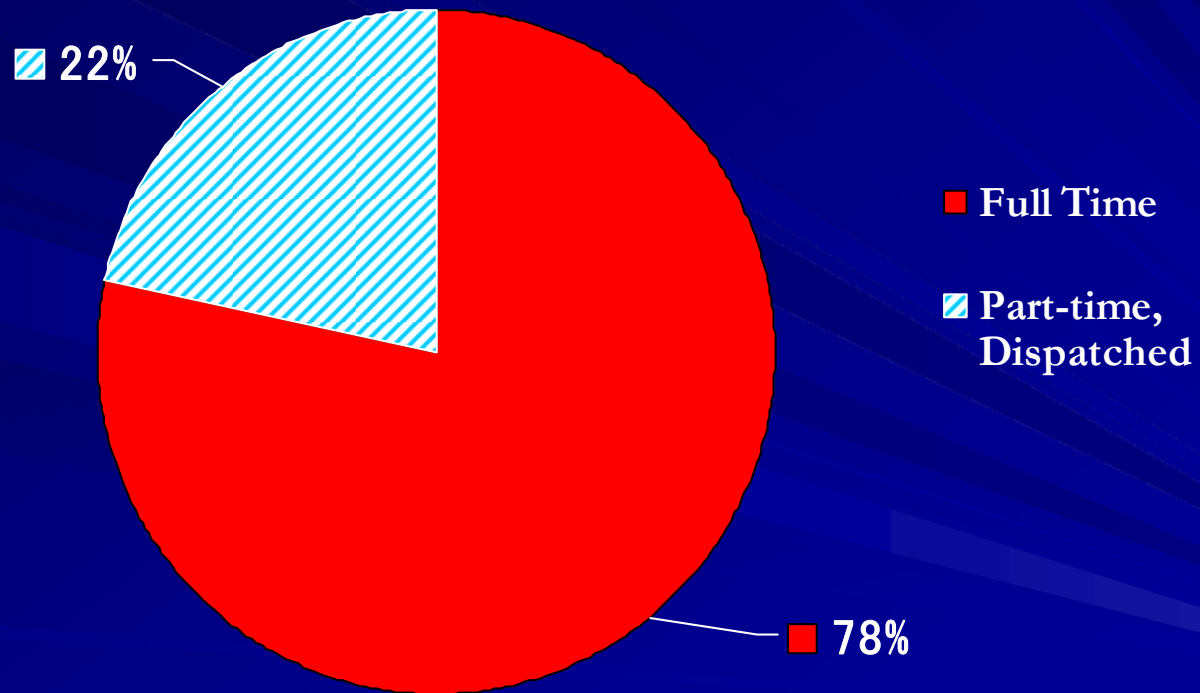
Total # of Employees : 9,027



*Others: Assistance for CRAs, IT related, Medical examiners related to clinical trials, Sales promotion, and etc.

Employment in 2008

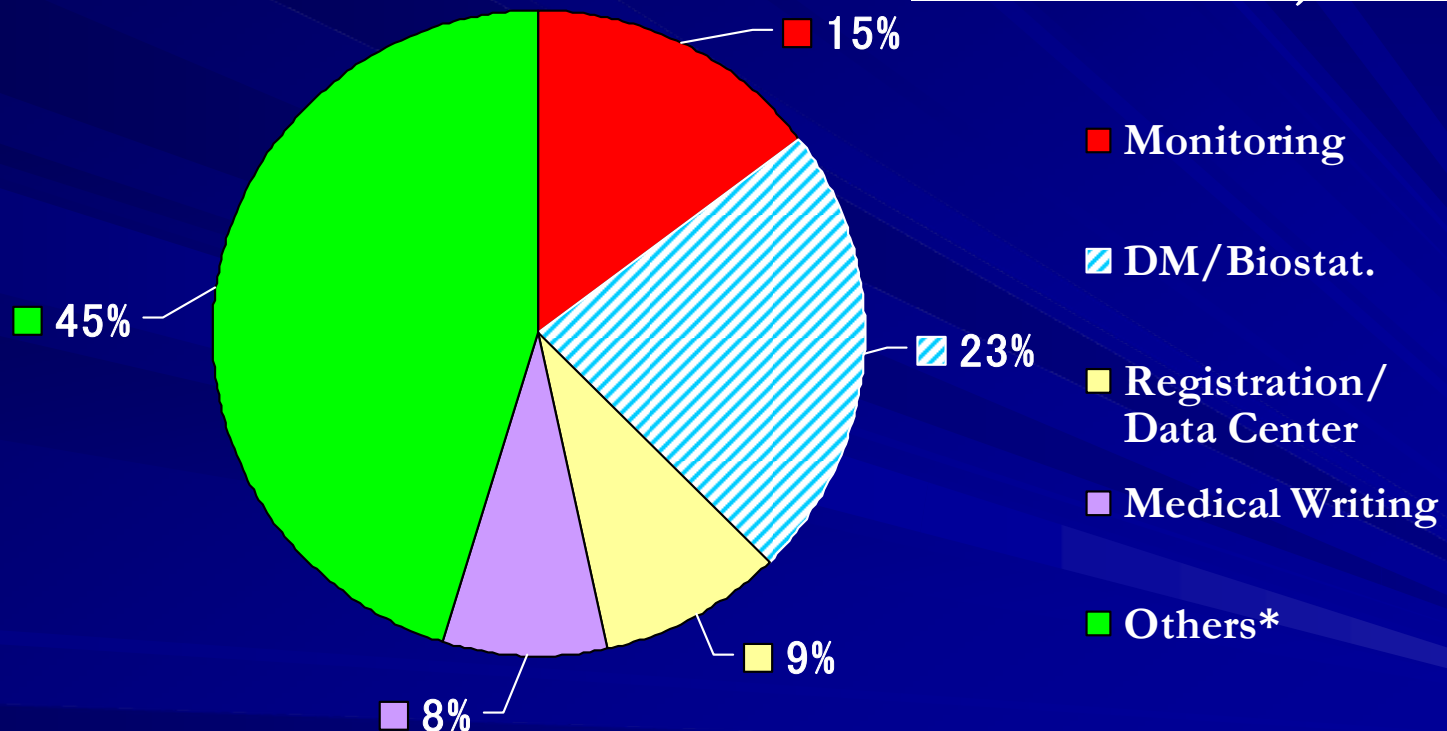
Total # of Employees: 9,027



2008 Clinical/Devices/Food & Supplement Breakdown of Outsourced Projects by Services

★1 Project =1 service per protocol

Total # of Projects: 7,614

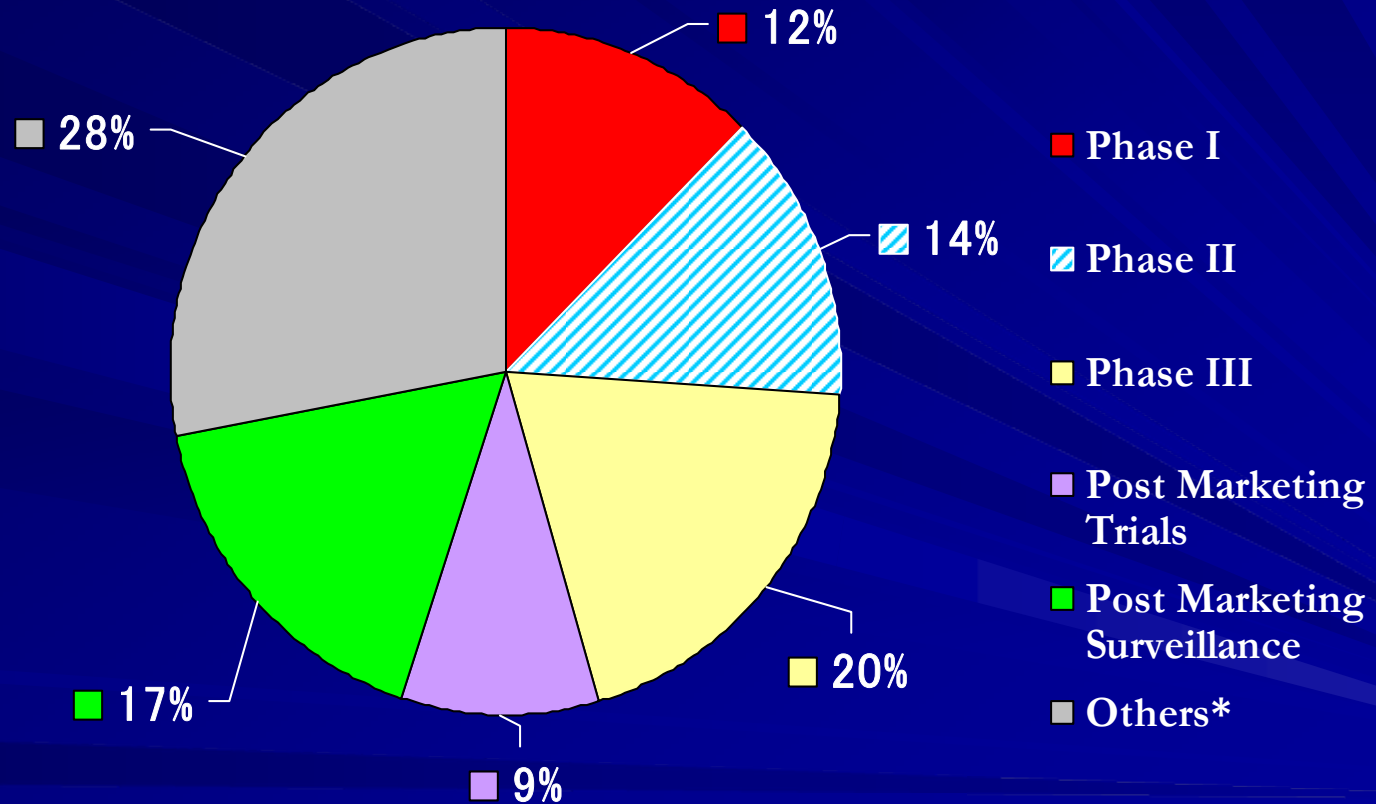


*Others: Medical exam. related to clinical trials, Temp agencies, IND for Medical Devices, Bioequivalent studies, System development for EDC and others, Food & Supplement studies, Academic investigation, and etc. (In the number of Items Order)

2008 Clinical Projects Breakdown by Phases

★1 Project =1 service per protocol

Total # of Projects : 5,156

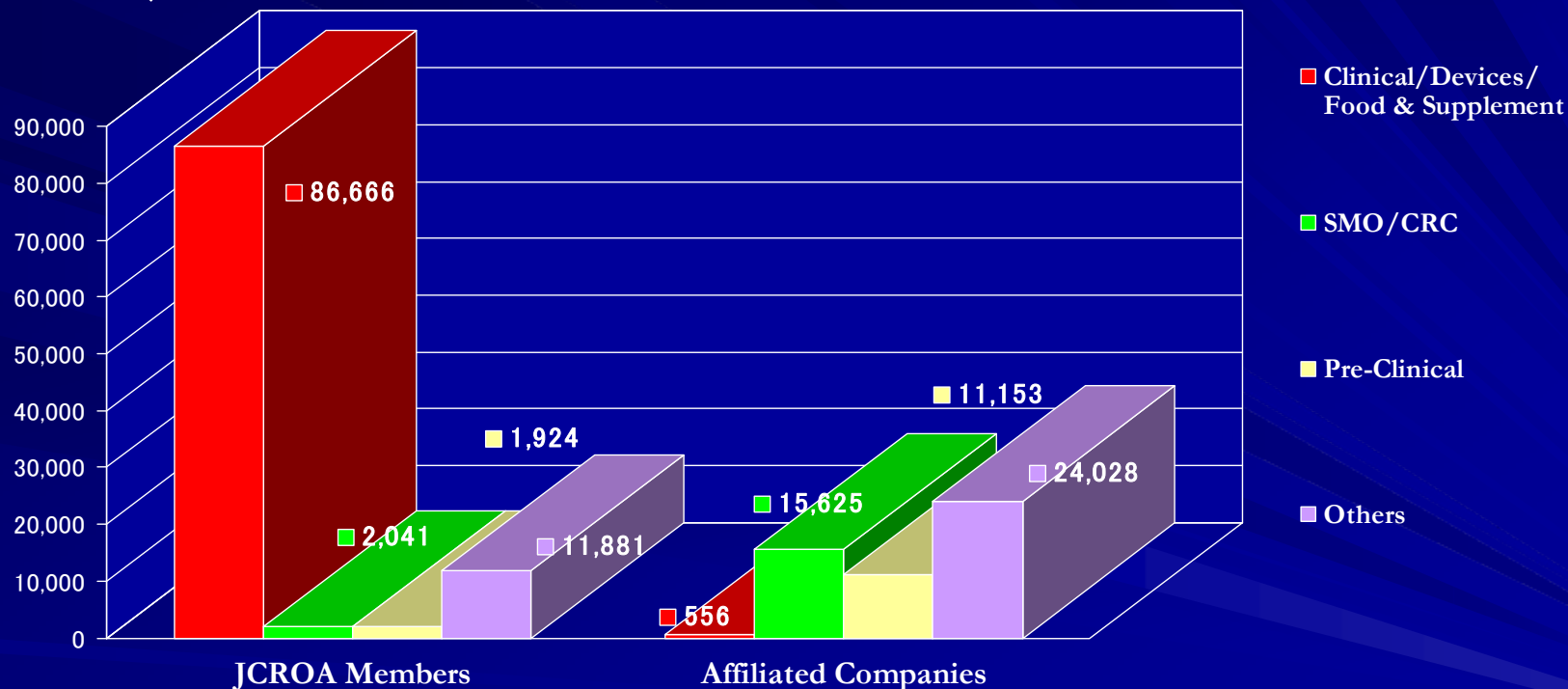


*Others: System development for EDC and others, Bioequivalent studies, Academic investigation, Training/Education, Safety report, Quality Control, and etc. (In the number of Items Order)

2008 Sales and Employees

JCROA Members v.s. Affiliated Companies*

(JPY Million)



Sales: JPY 102,512 Million
(Total # of Employees: 9,027)

Sales: JPY 51,362 Million
(Total # of Employees: 7,104)

* Affiliated Companies: 31 companies who have capital relation with the JCROA Members.