



Annual Report 2011 (Jan-Dec)

February 27, 2012

Japan CRO
Association

JCROA 2011

Total Number of Members: 27 companies

**{ Regular Member: 18 companies
Associate Member: 6 companies
Supporting Member: 3 companies**

(Note)

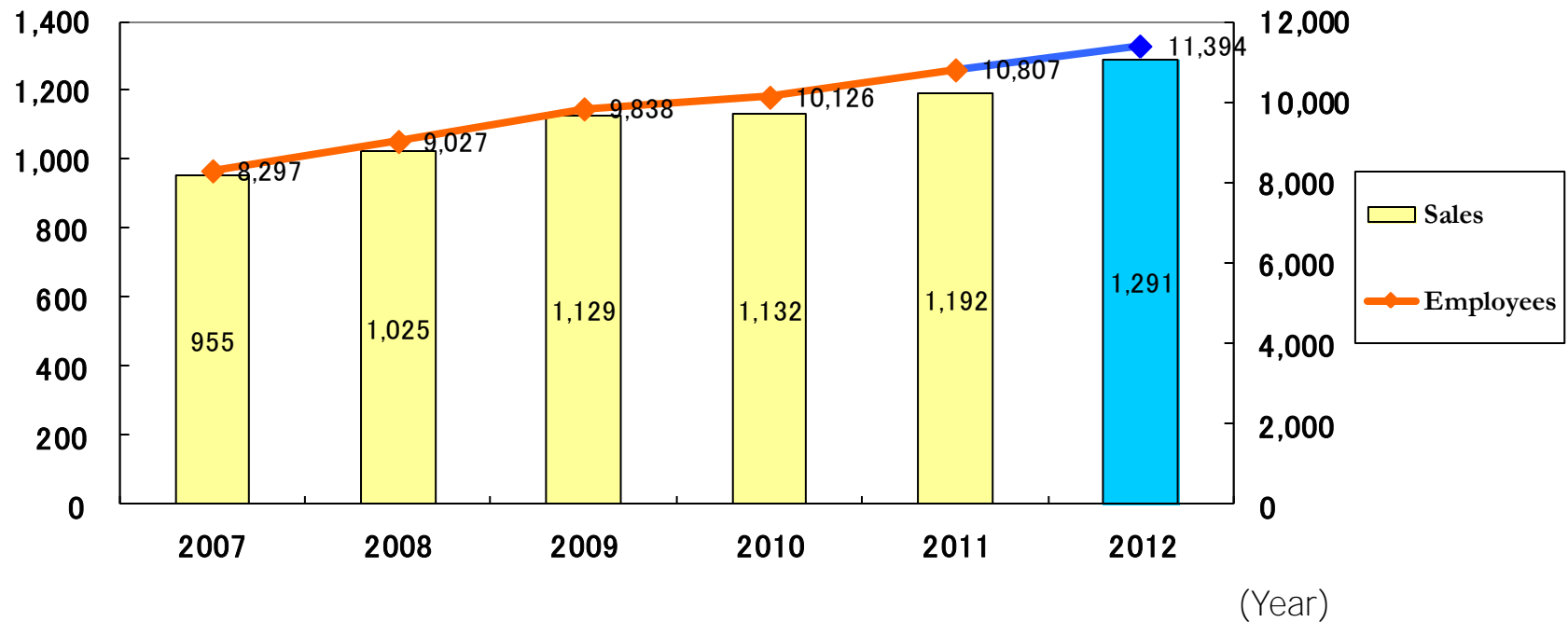
- * The business results are calculated in business areas such as 1) Pharmaceutical Development, 2) Medical Devices Development, 3) Food & Nutrition-Supplement Development 4) Pre-Clinical, and 5) Others (including SMO/CRC) from 26 companies in 2011, excluding 1 supporting member in this report.
- * The estimated figures are calculated on the basis of approximate figures from average values of valid responses.
- * Data of affiliated companies## of JCROA is available on Page 20.

##) Affiliated Companies have capital ties with 10 JCROA members companies in 2011.

Sales and Employees 2007-2011

(Sales Unit: 100 Mil.¥)

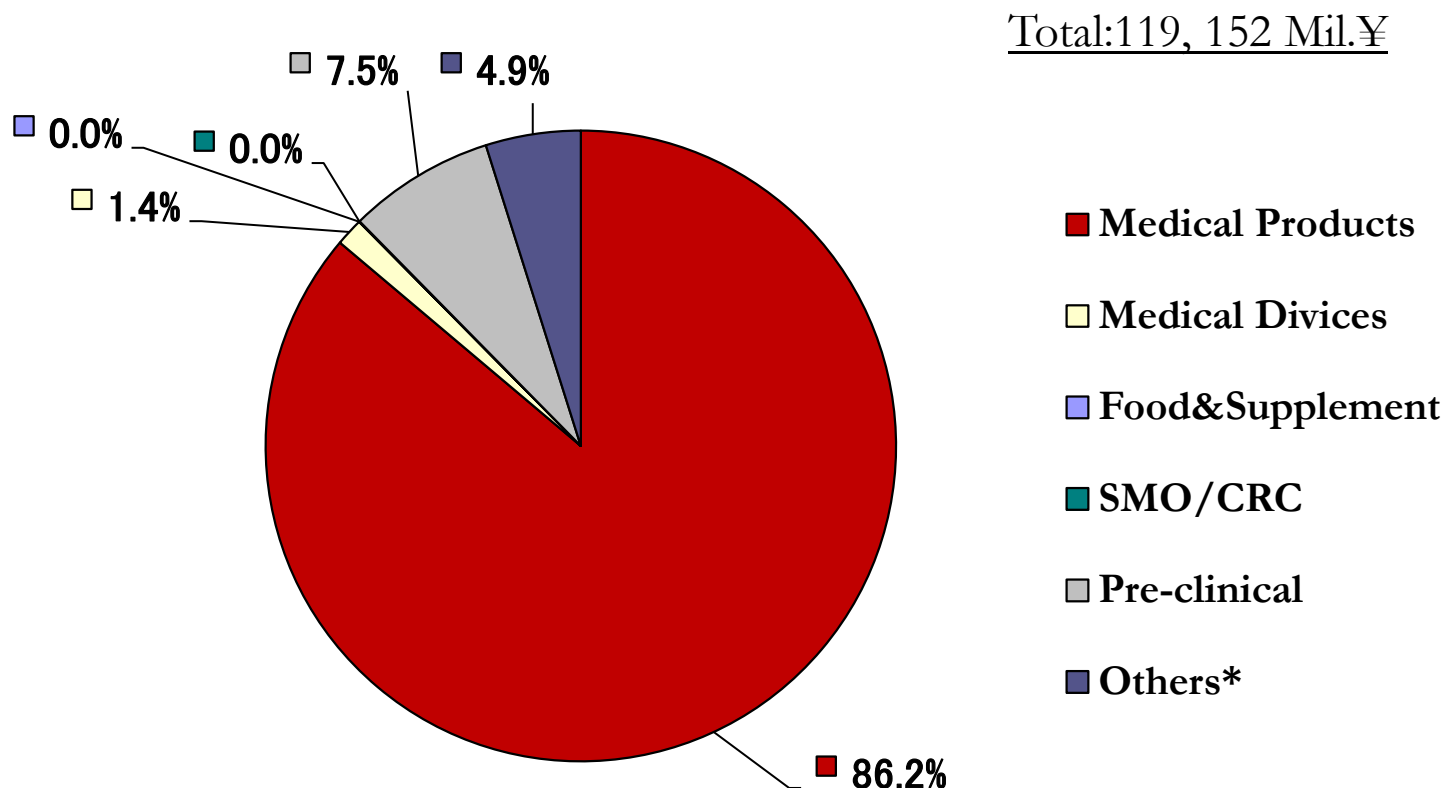
(Employee No.)



Estimate

Note) Count and estimate data of 40 companies in 2007, 39 companies in 2008, 33 companies in 2009, 26 companies in 2010 through 2012

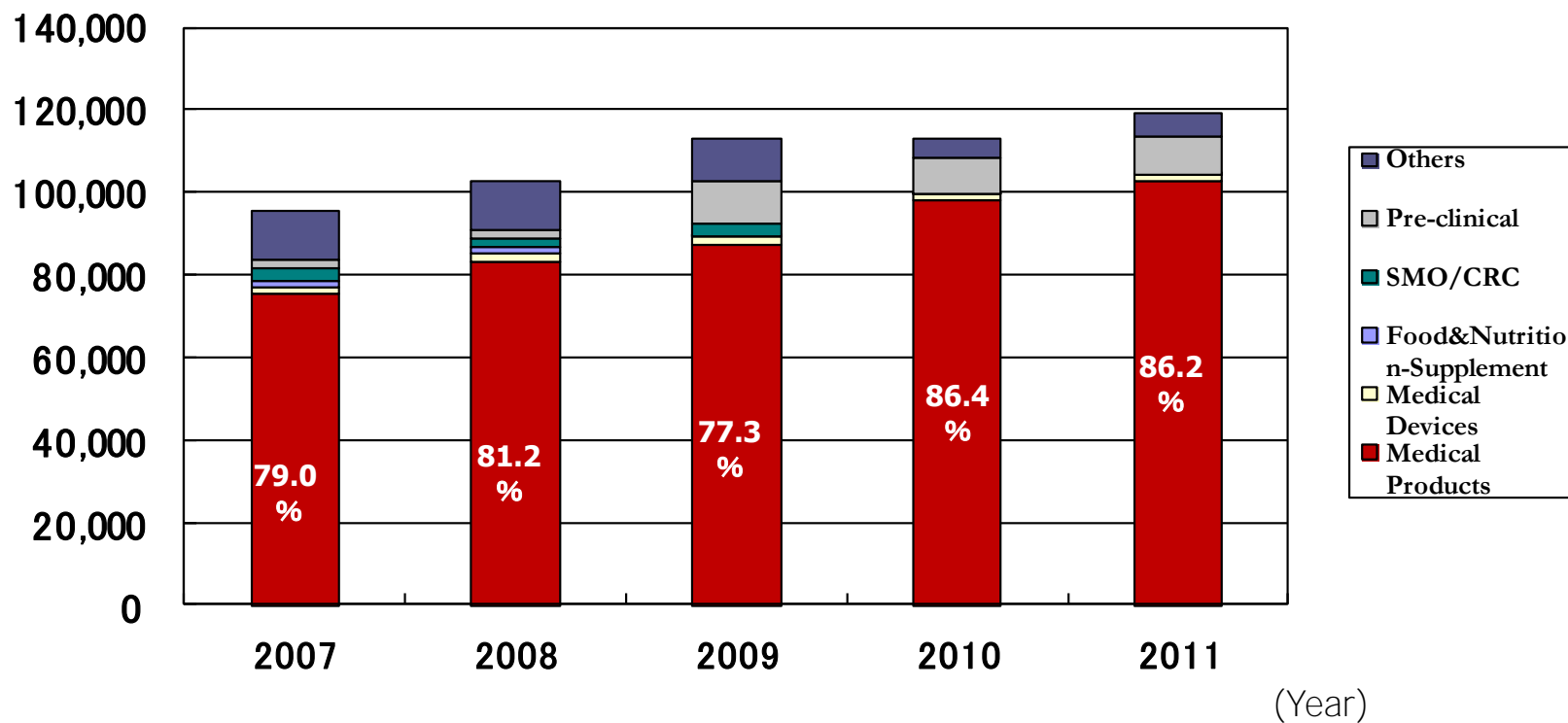
2011 Sales by Fields



*Others: Central Laboratory, Laboratory, System development, Academic clinical research, etc.
(In Sales Amount Order)

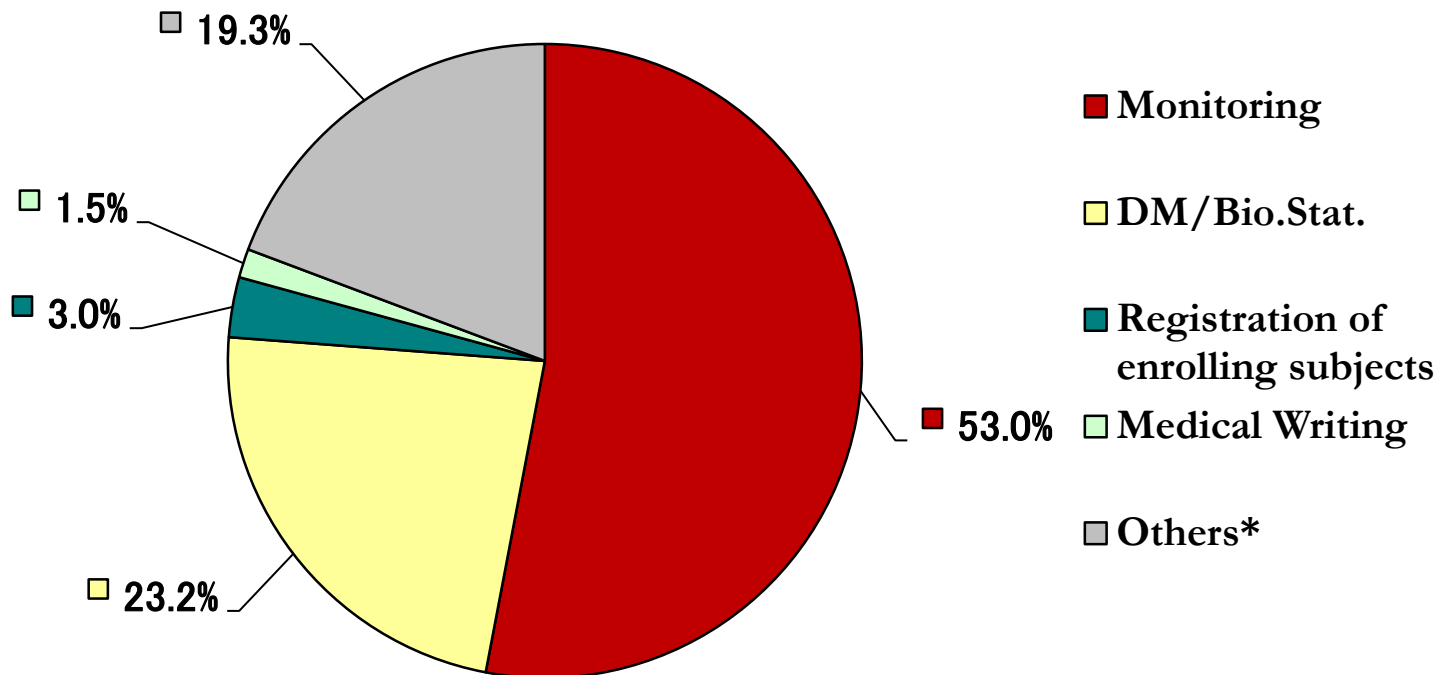
Sales by fields 2007-2011

(Sales Unit : 1 Mil.¥)



2011 Medical Products/Devices/Food & Nutrition-Supplement Sales by Services

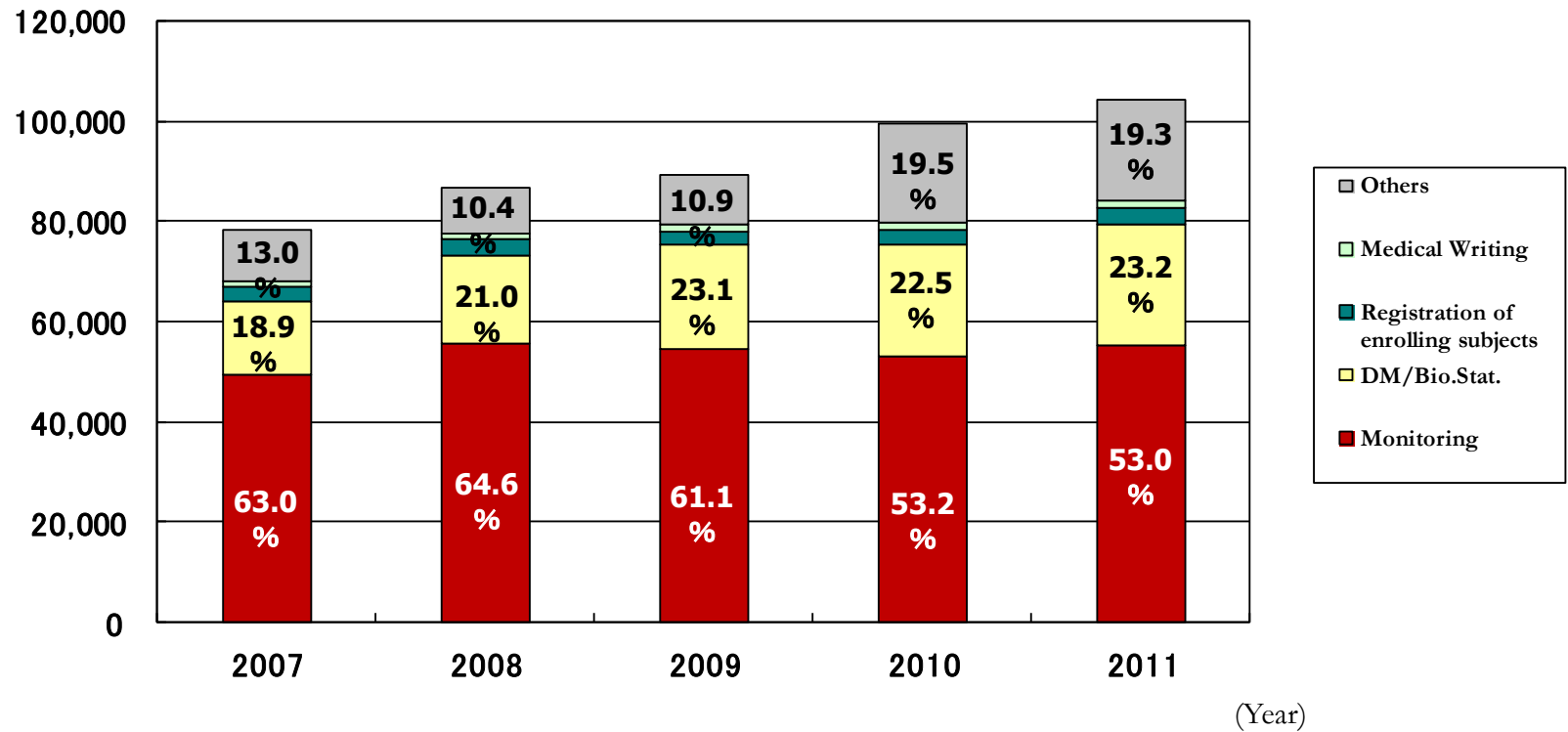
Total: 104,376 Mil.¥



*Others : Central laboratory, Bioequivalent studies, Investigators –initiated trials, Academic clinical research, Academic scientific investigations and etc. (In Sales Amount Order)

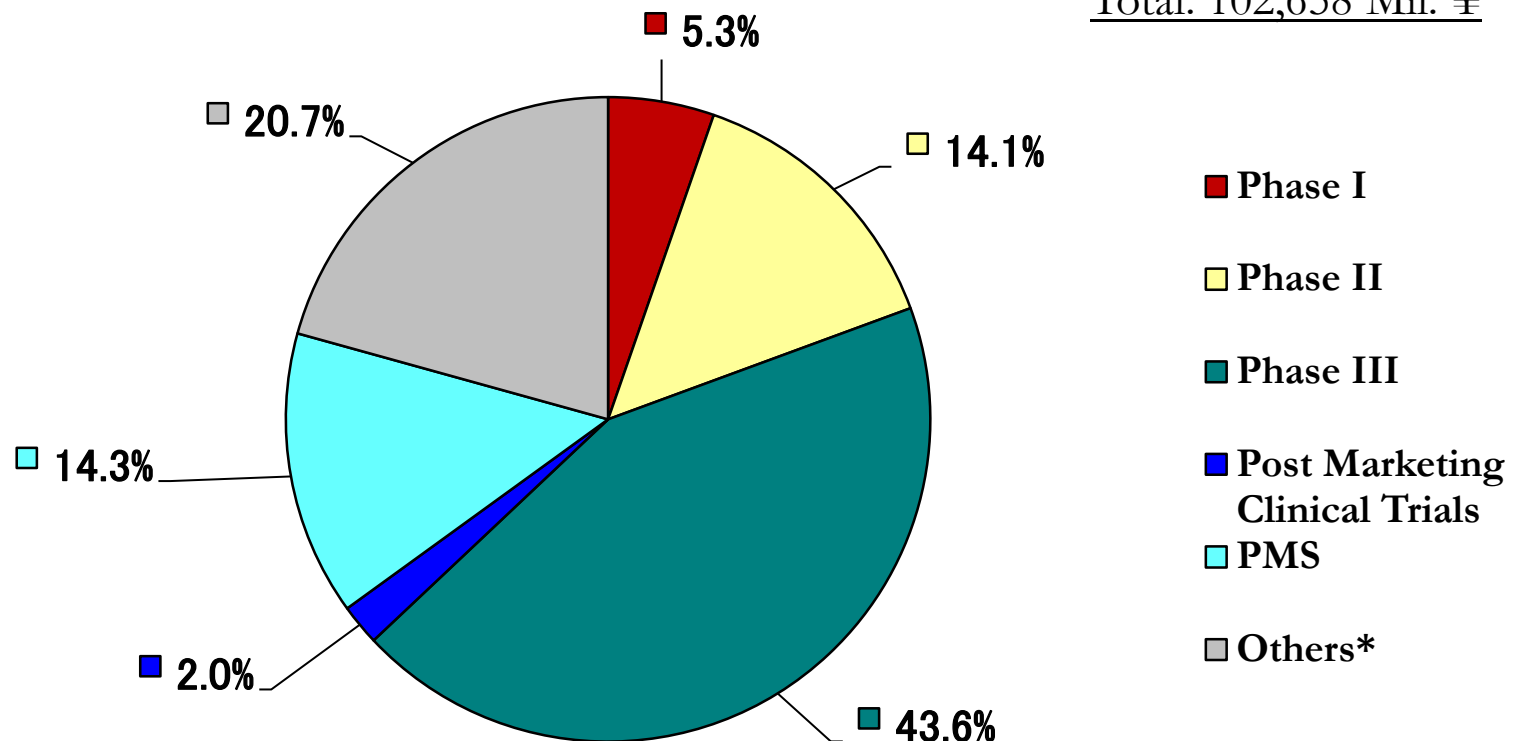
Medical Products/Devices/Food & Nutrition-Supplement Sales by Services 2007-2011

(Sales Unit: 1 Mil.¥)



2011 Medical Products Sales by Phases

Total: 102,658 Mil. ¥

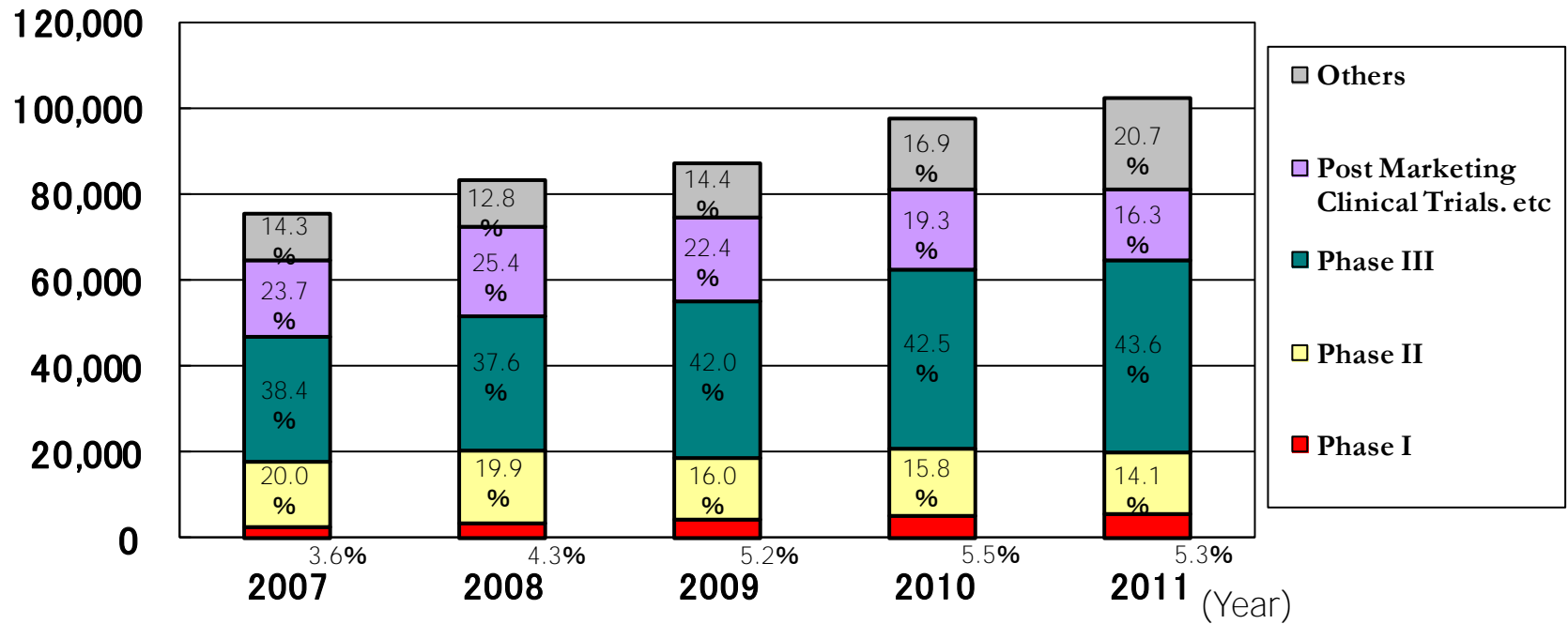


*Others: Temporary dispatching (5.5%), Bioequivalent studies, Investigators –initiated trials, Academic clinical research, Academic scientific investigations, System development for EDC and others, Safety management, report, Quality control related and etc. (In the Number of Items Order)

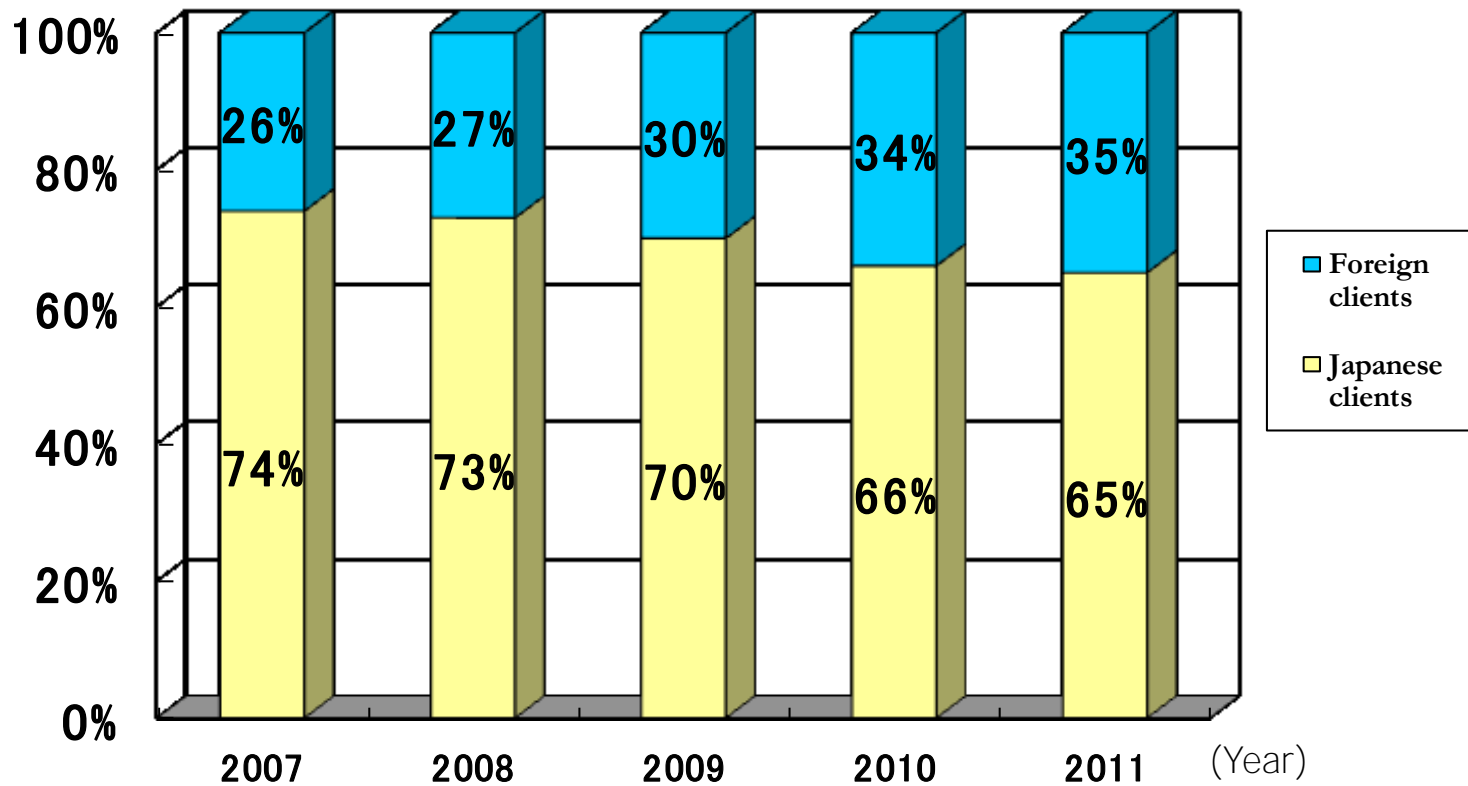
Medical Products Sales by Phases

2007-2011

(Sales Unit: 1 Mil.¥)

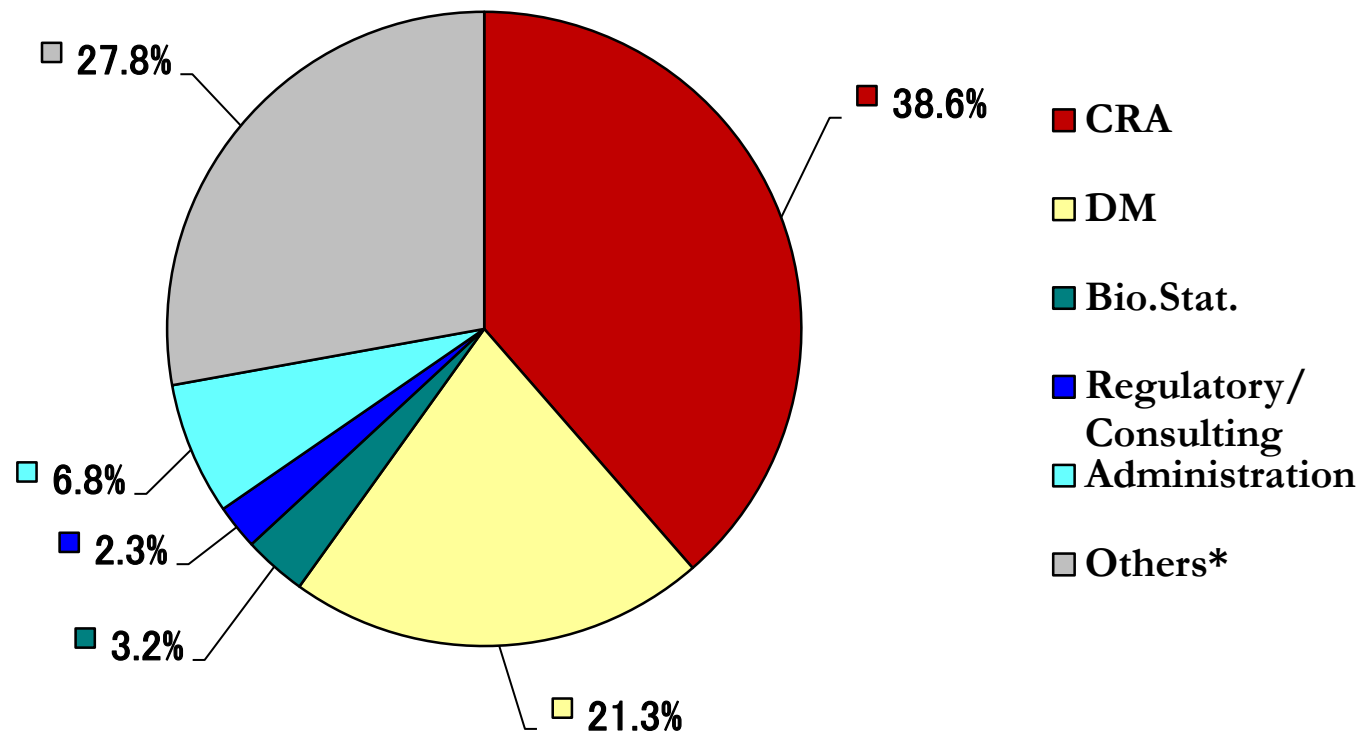


Sales by Clients 2007-2011



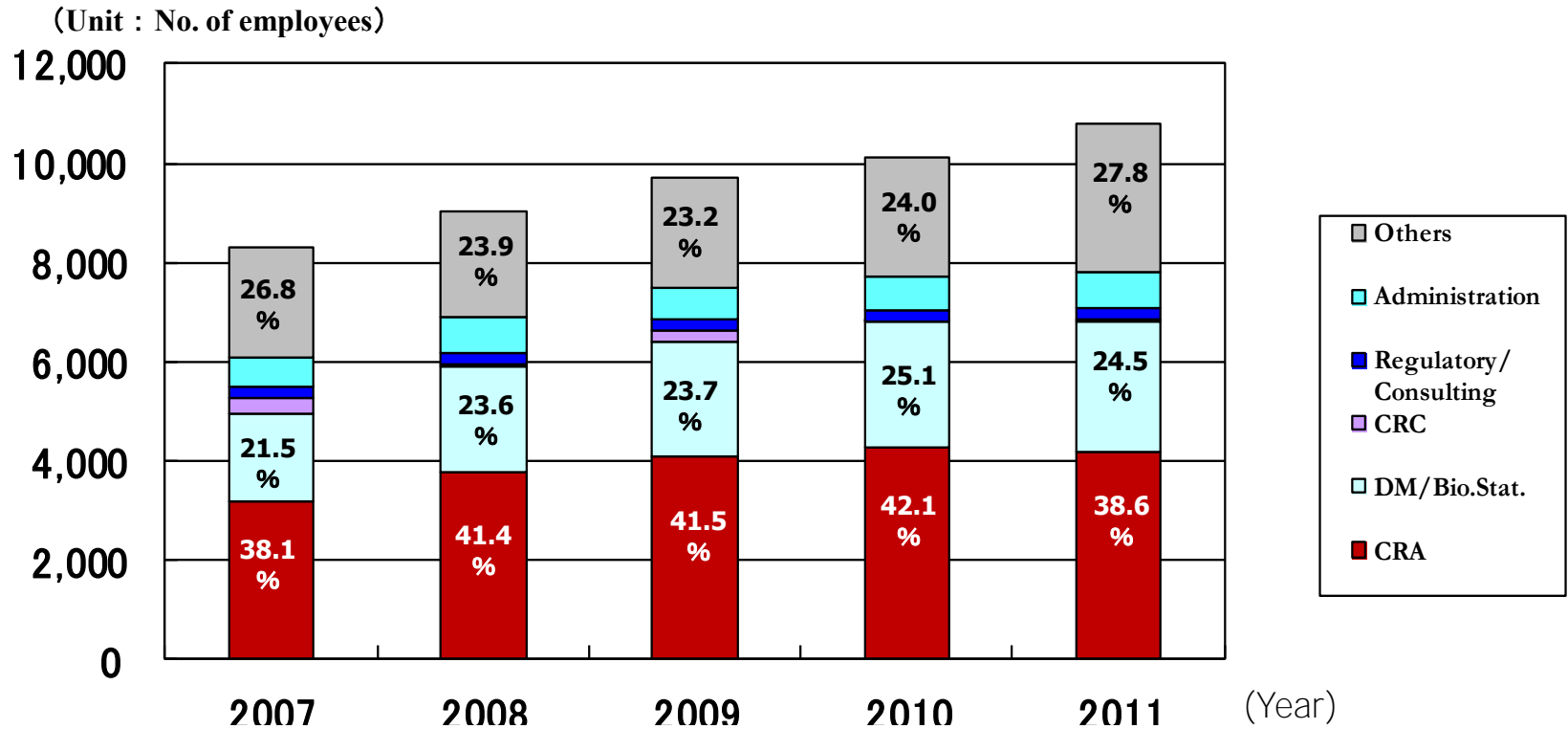
2011 Employees by Services

Total No. of employees: 10,807



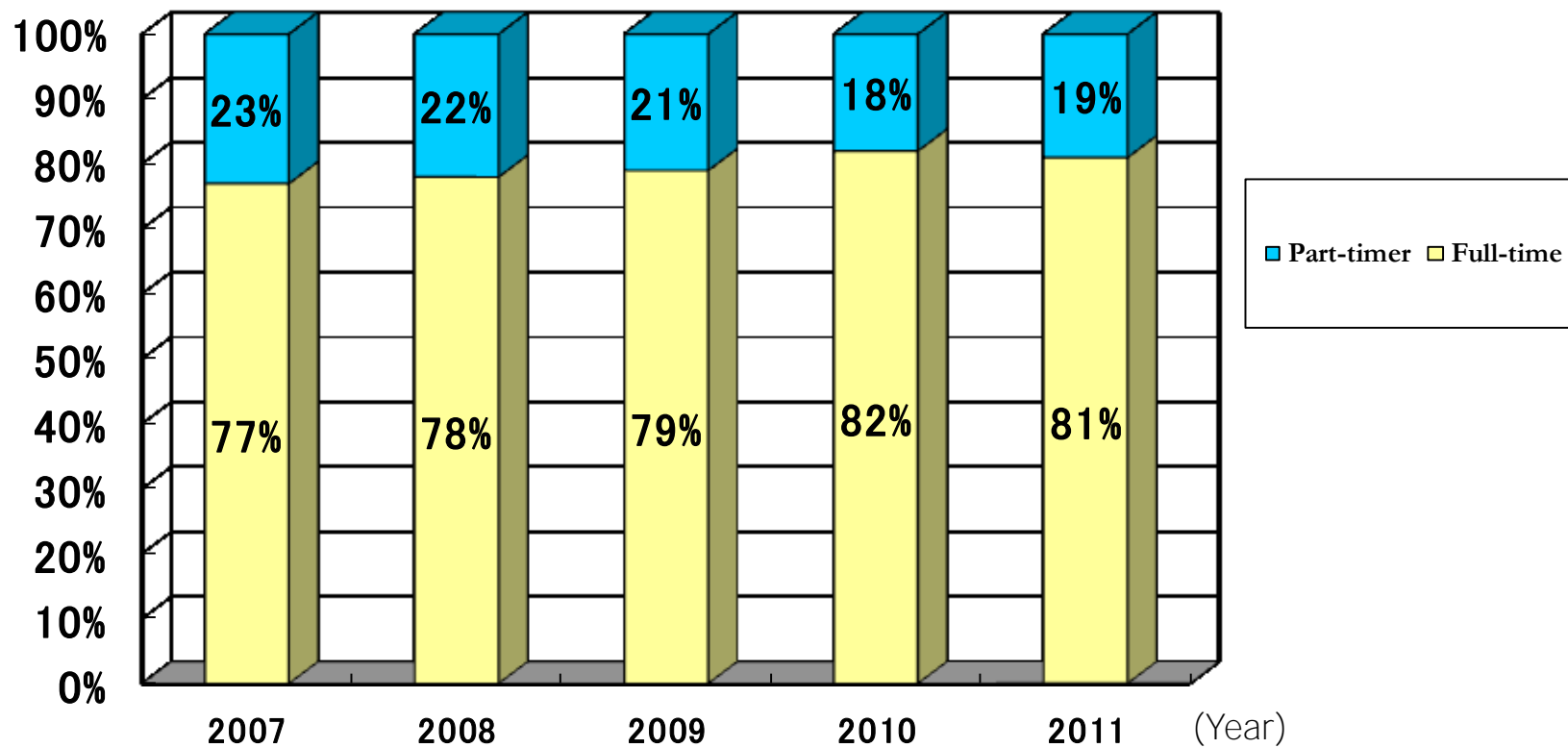
*Others: Assistance for clinical research activities, IT related, Central laboratory, Sales and marketing and etc.

Employees by Services 2007-2011



Employment Pattern 2007-2011

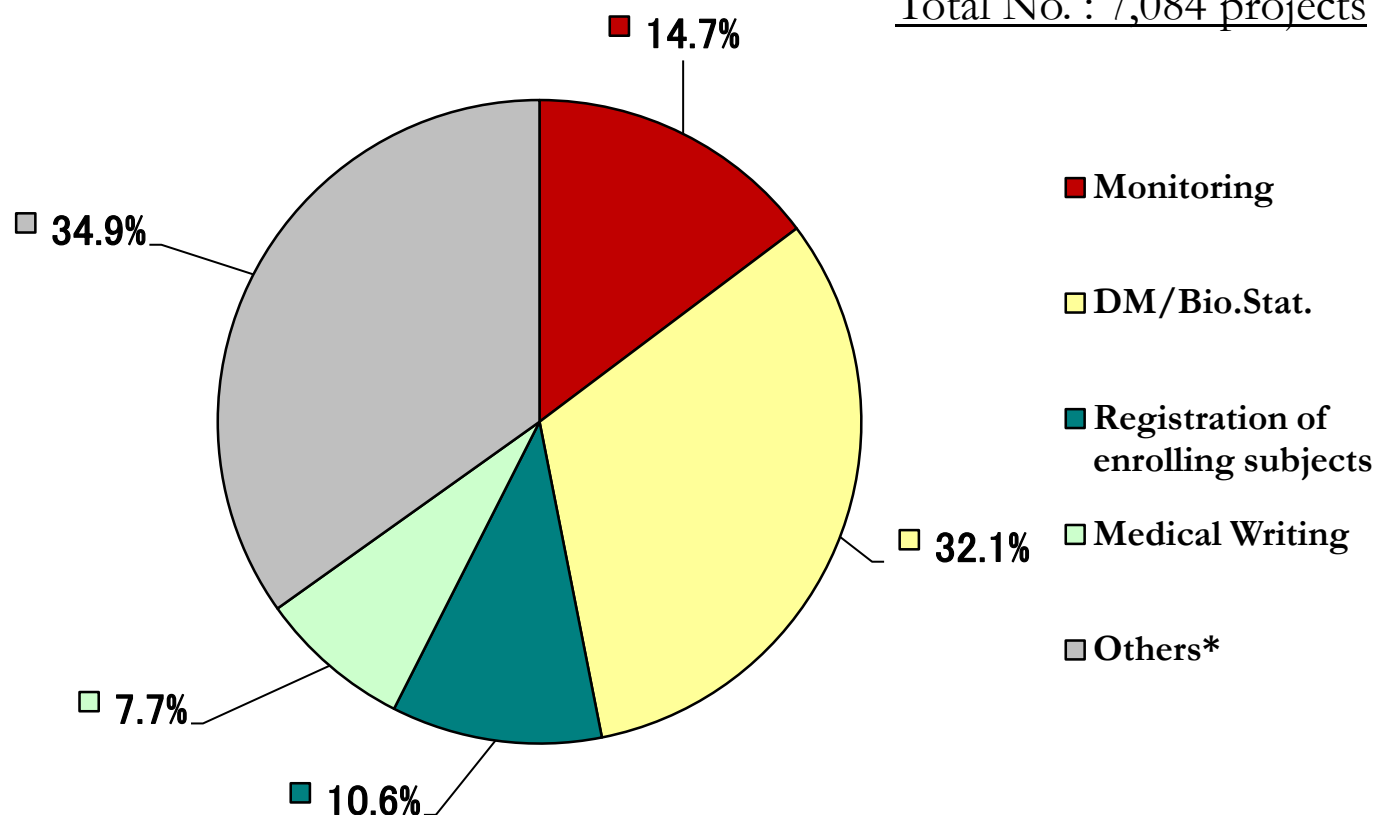
2011 Total No. of employees :10,807



2011 Medical Products/Devices/Food & Nutrition-Supplement Outsourced Projects by Services

★1 Project =1 service per protocol, not including any projects associating temporary dispatching

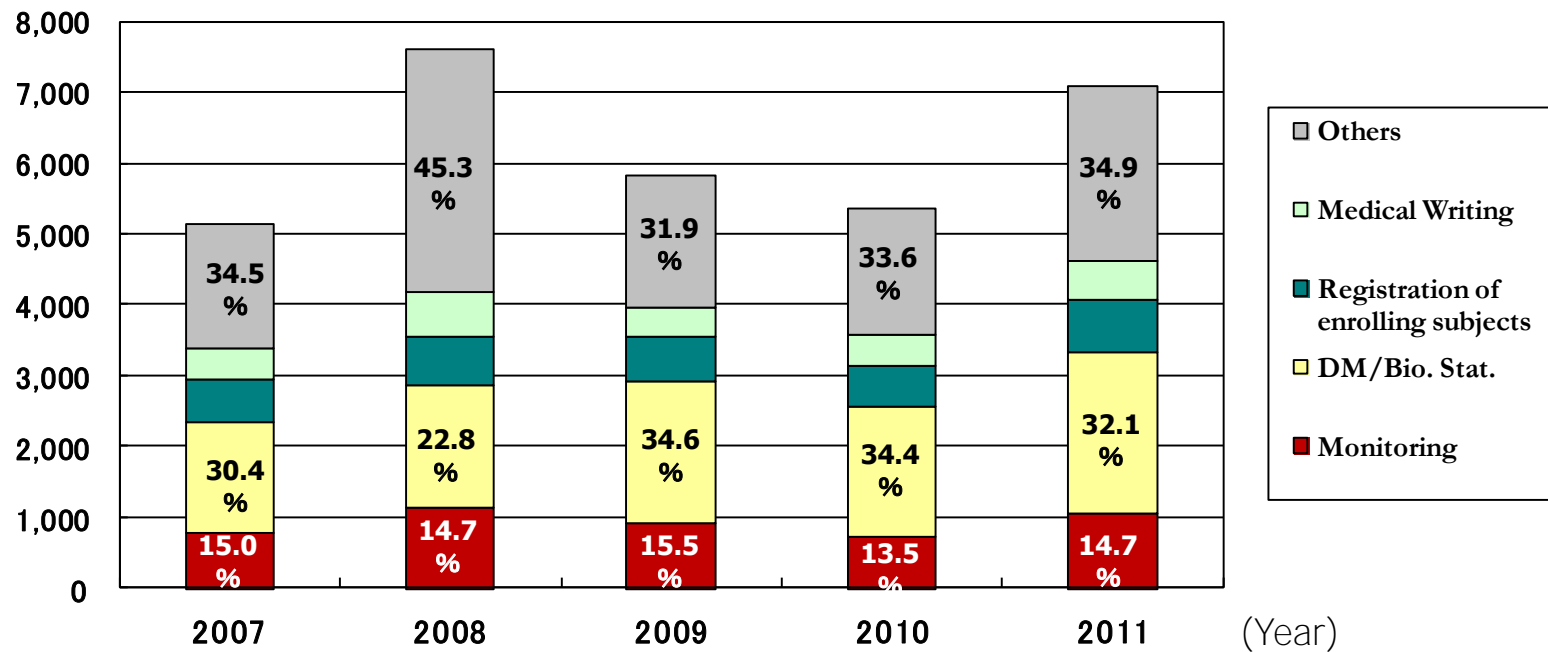
Total No. : 7,084 projects



*Others: Central laboratory, Bioequivalent studies, Investigators –initiated trials, Academic clinical research, Academic scientific investigations, System development for EDC and others, Safety report management, Quality control related and etc. (In the Number of Items Order)

Medical Products/Devices/Food & Supplement Projects by Services 2007-2011

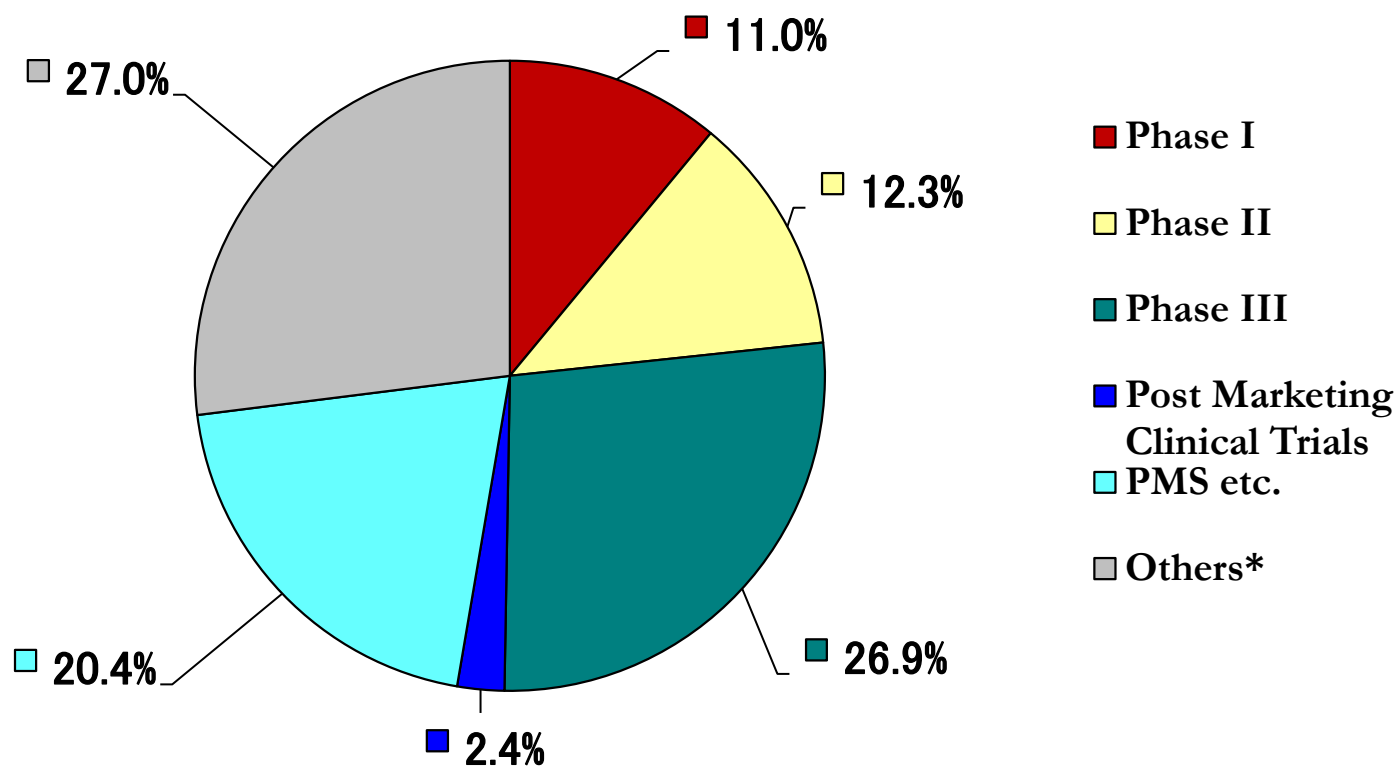
(Unit : No. of projects)



2011 Medical Products Projects by Phases

★1 Project =1 service per protocol, not including any projects associating temporary dispatching

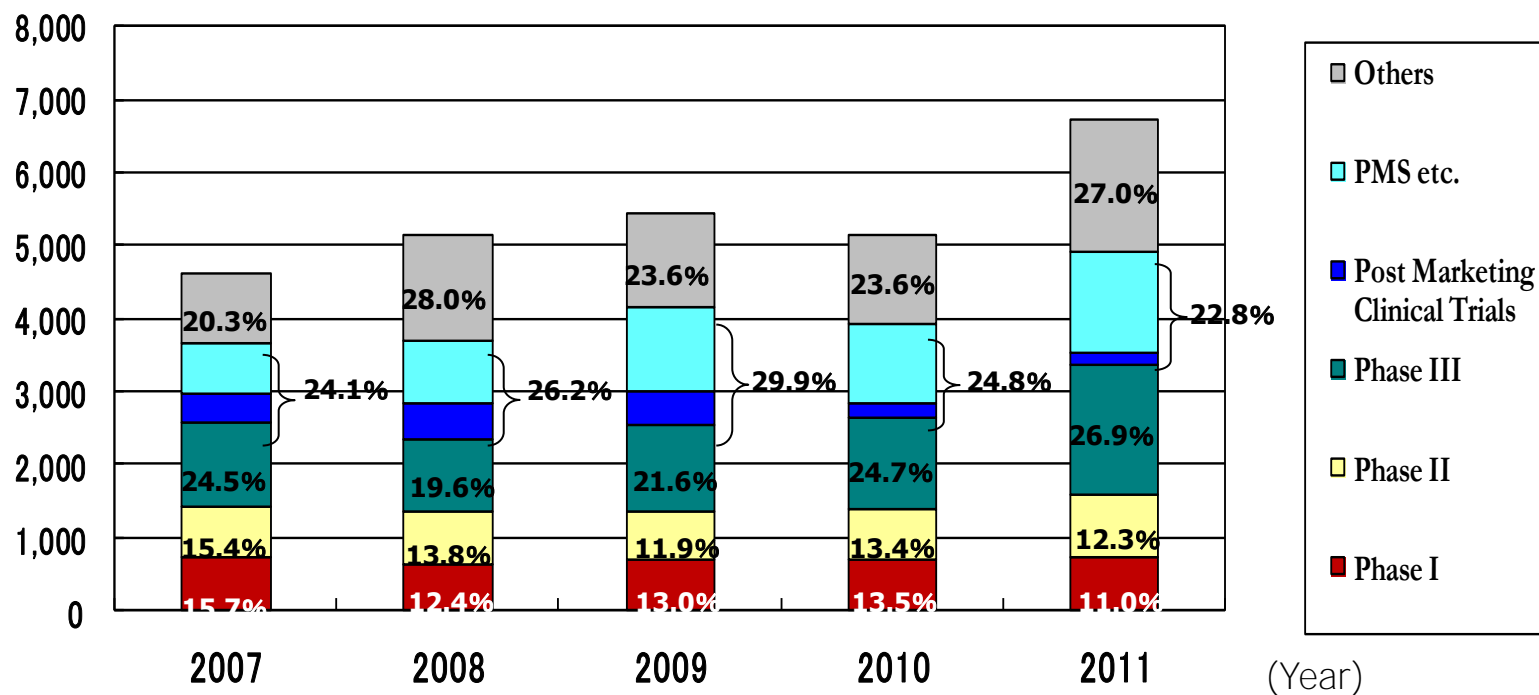
Total No. of projects:6,717



*Others: Central laboratory, Bioequivalent studies, application of MF and generic medicines, overseas regulatory affairs activities, Investigators –initiated trials, Academic clinical research, Academic scientific investigations, System development for EDC and others, Safety report management, Quality control related and etc. (In the Number of Items Order)

Medical Products Projects by Phases 2007-2011

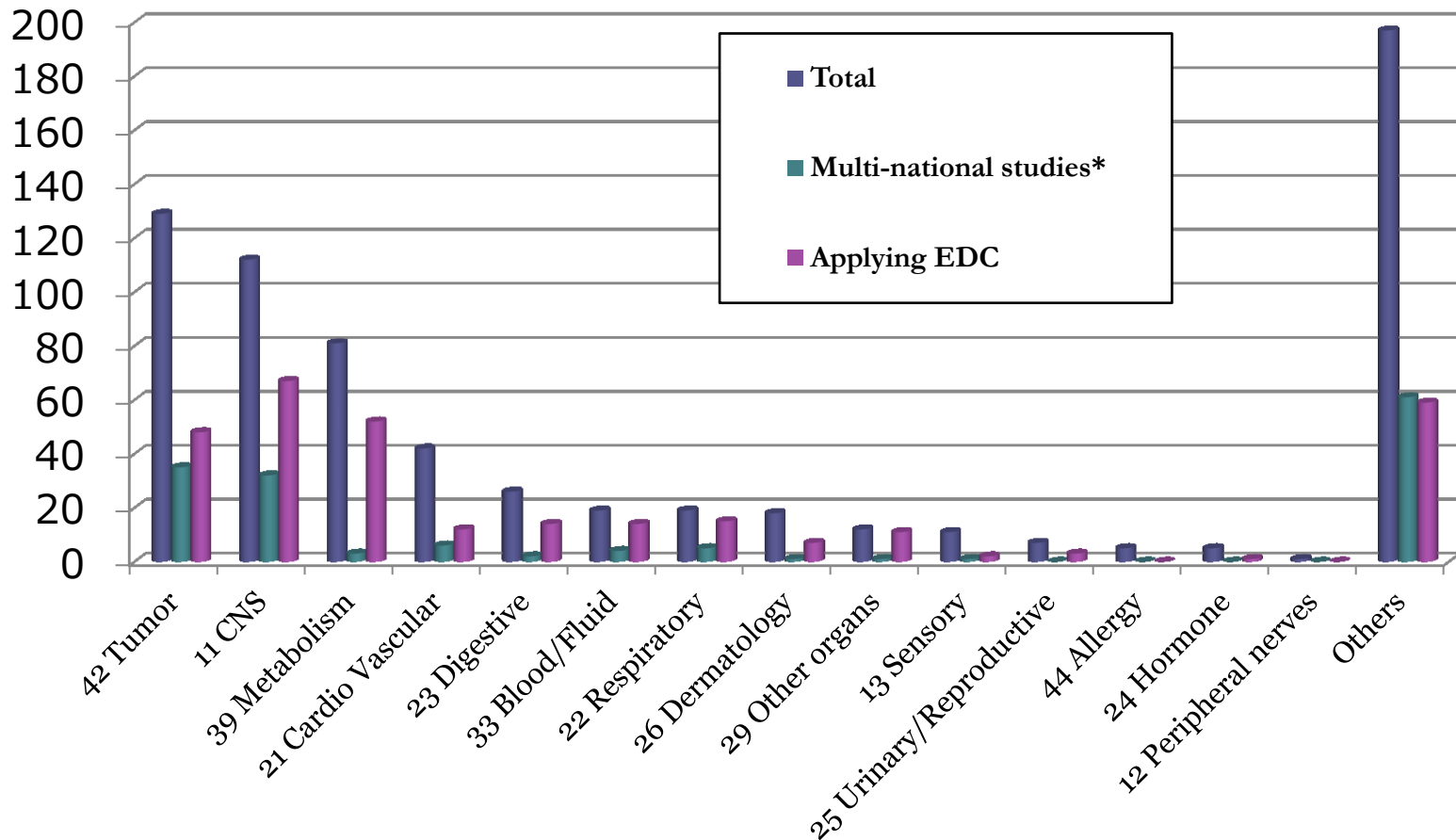
(Unit: No. of projects)



2011 Monitoring Projects* by Therapeutic Area

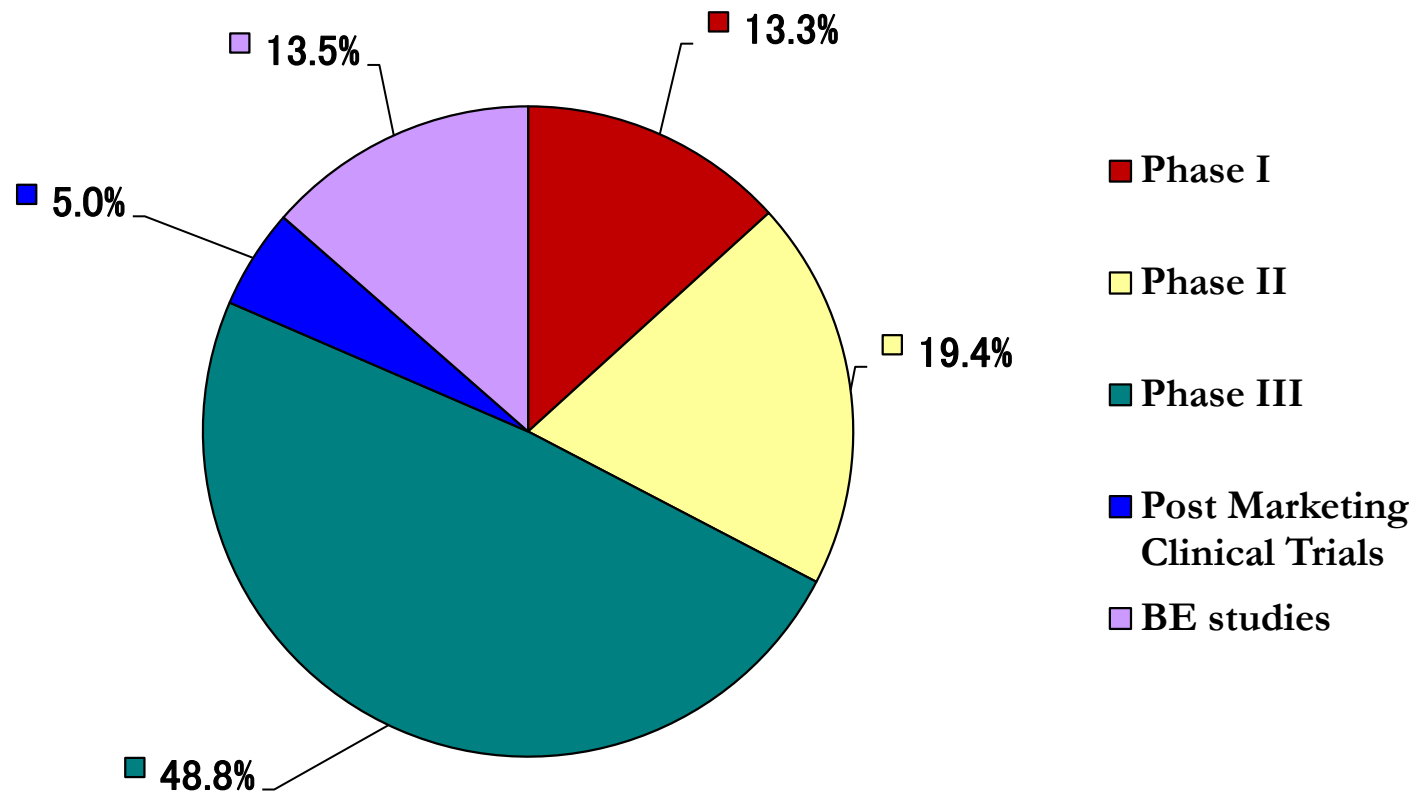
- 686 projects as available data
- ** Multi-National Studies: Studies conducted in multi countries simultaneously with the same protocol.

(Units: No. of projects)

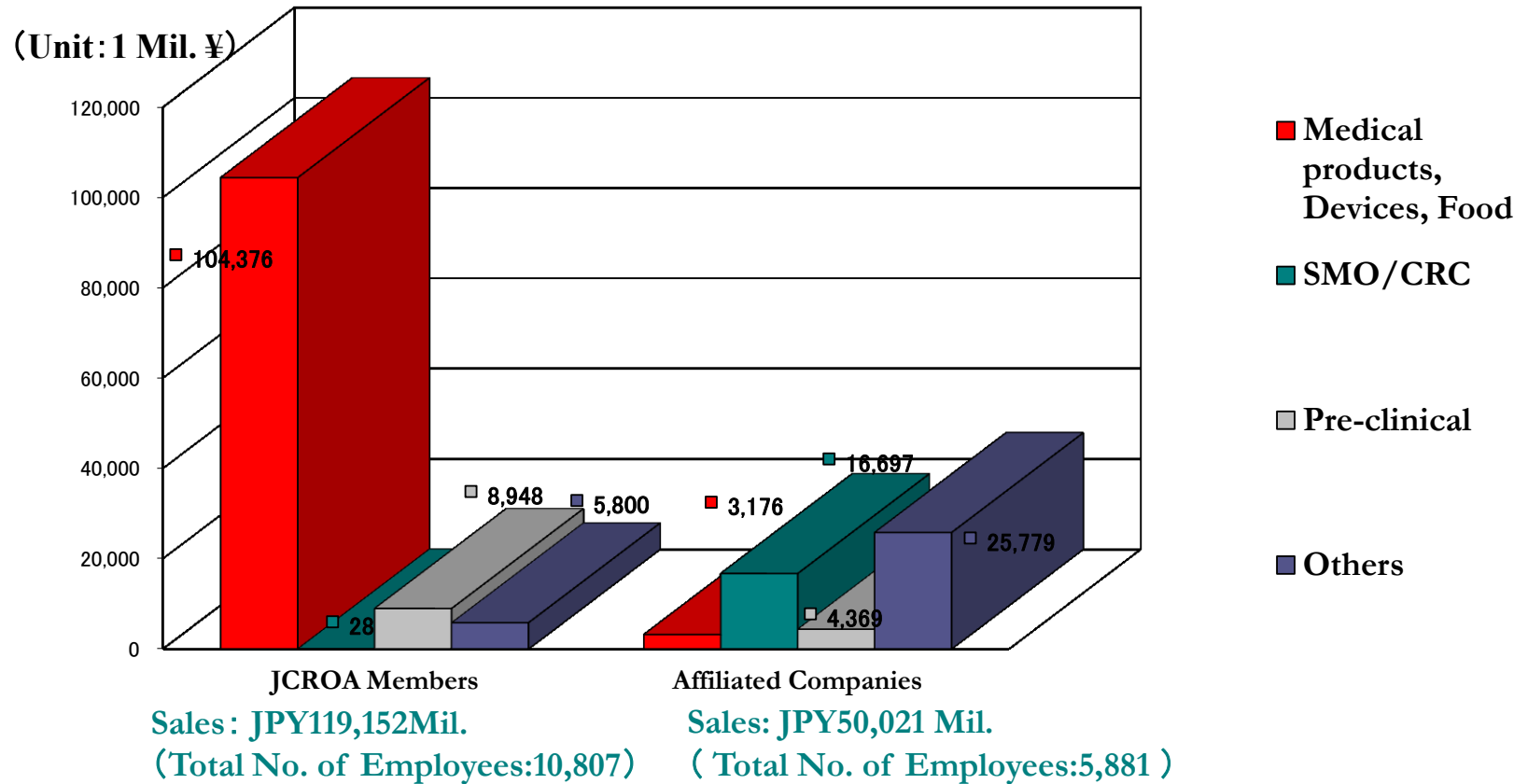


2011 Monitoring Projects* by Phases

* 686 projects as available data out of total number of monitoring projects



2011 Sales and Employees JCROA Members vs. Affiliated Companies*



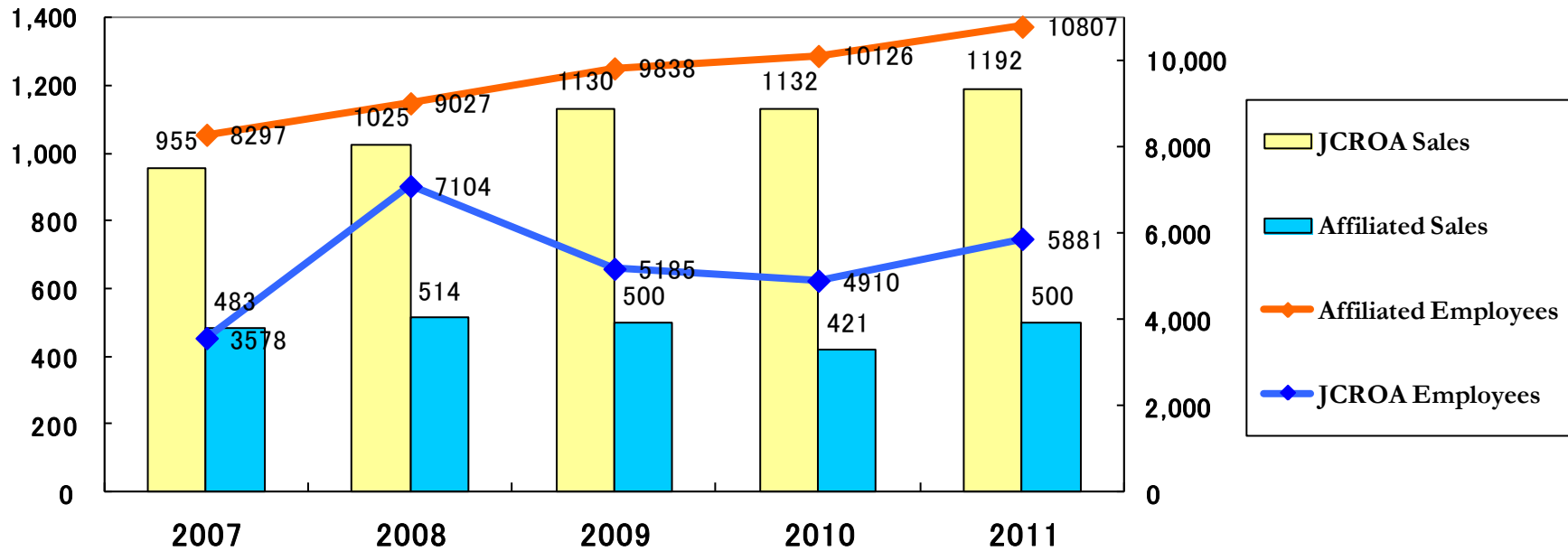
•Affiliated Companies: To have capital ties with the JCROA Members.

•Others do not include business that does not associate with pharmaceutical development such as pharmacies, real estate.

Total Sales & Employees for JCROA Members/Affiliated Companies* 2007-2011

(Unit: 100 Mil¥)

(Unit: Employees No.)



CRO/Affiliated
Market Size

1,438
(11,875)

1,539
(16,131)

1,630
(15,023)

1,553
(15,036)

1,691
(16,688)

100 Mil.¥
(Employees No.)