



Annual Report 2013 (Jan-Dec)

April 11, 2014

Japan CRO
Association

JCROA 2013

Total Number of Members: 28 companies

{ Regular Member: 16 companies
{ Associate Member: 5 companies
{ Supporting Member: 7 companies

(Note)

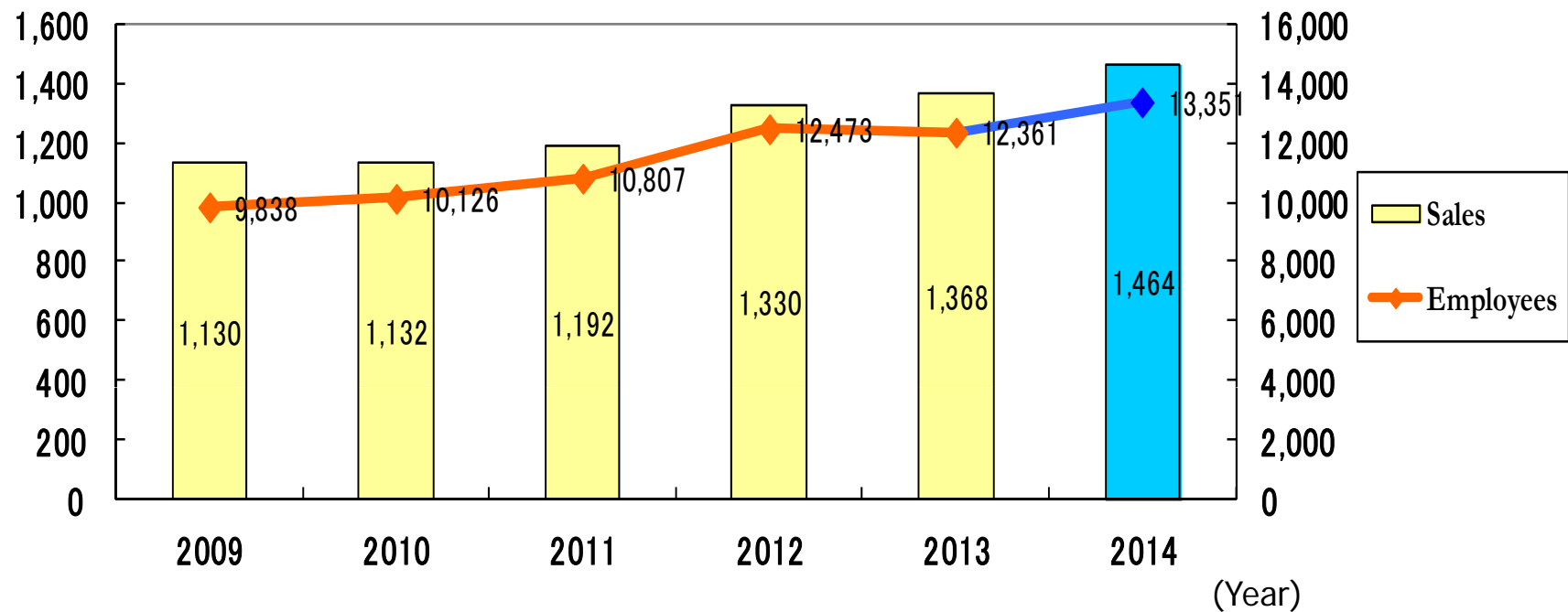
* The business results are calculated in business areas such as 1) Pharmaceutical Development, 2) Medical Devices Development, 3) Food & Nutrition-Supplement Development 4) Pre-Clinical, and 5) Others (including SMO/CRC) from 24 companies in 2013, excluding 1 regular member and 3 supporting member in this report.

* The estimated figures are calculated on the basis of approximate figures from average values of valid responses.

Sales and Employees 2009-2013

(Sales Unit: 100 Mil.¥)

(Employee No.)

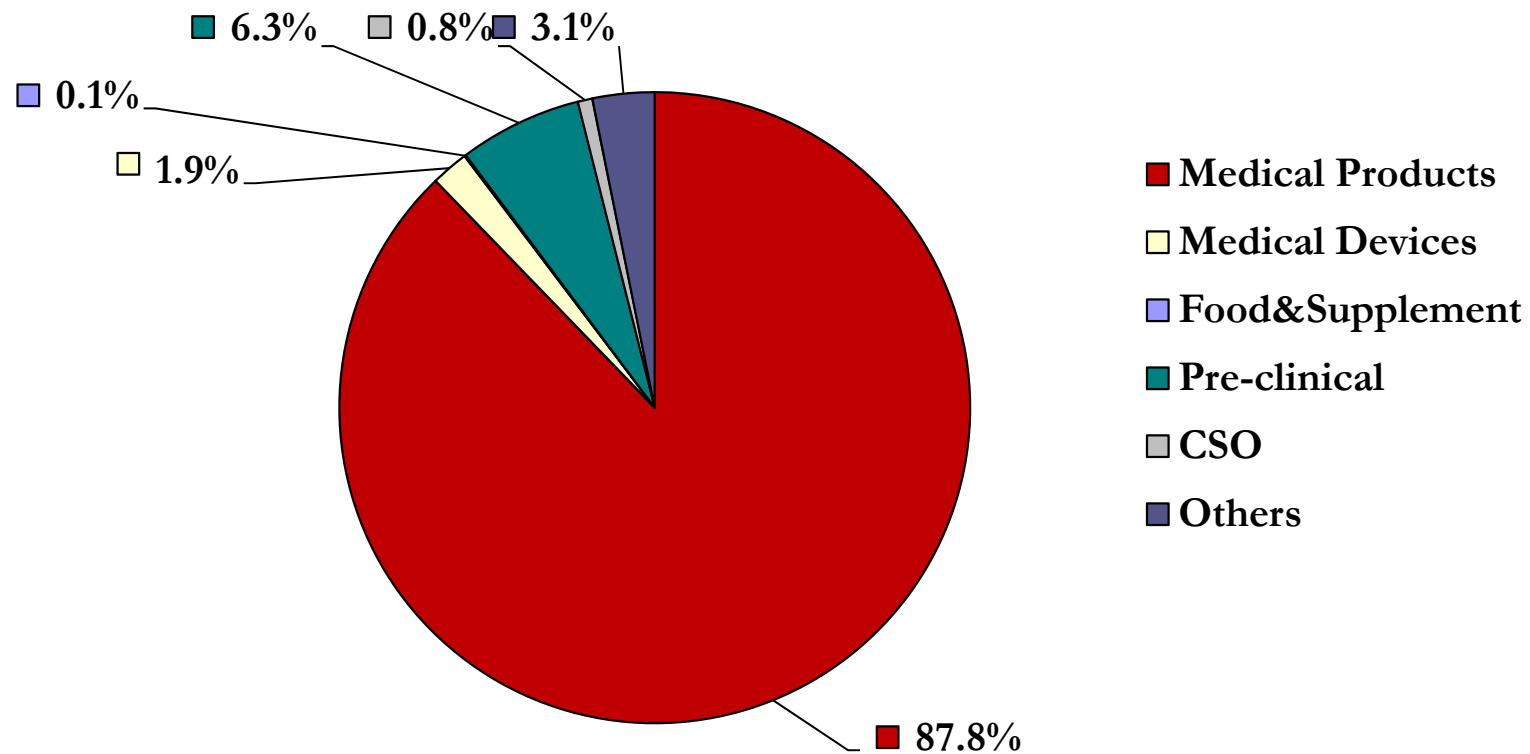


Estimate

Note) Count and estimate data of 33 companies in 2009, 26 in 2010 and 2011, 25 in 2012, 24 in 2013 and 2014

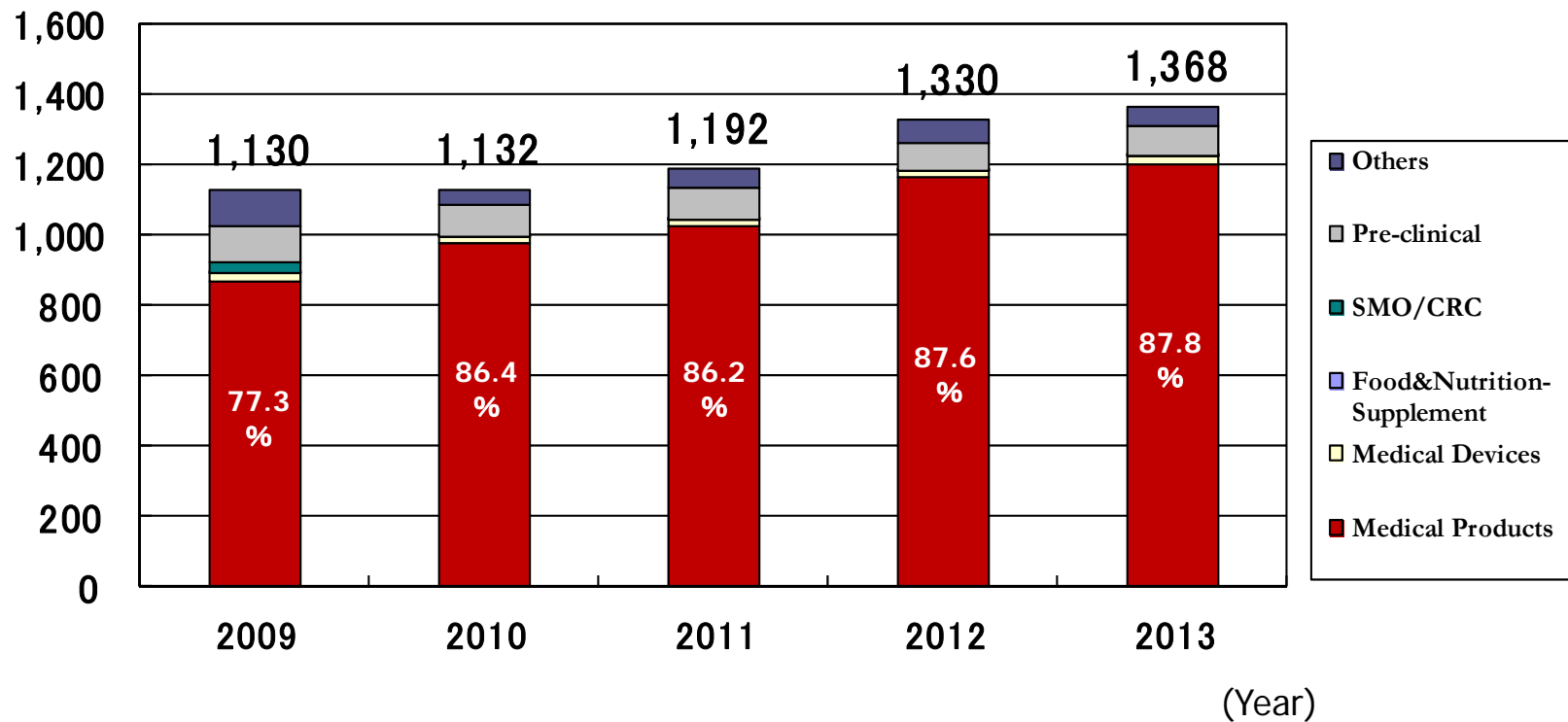
2013 Sales by Business Fields

Total:136,800 Mil.¥



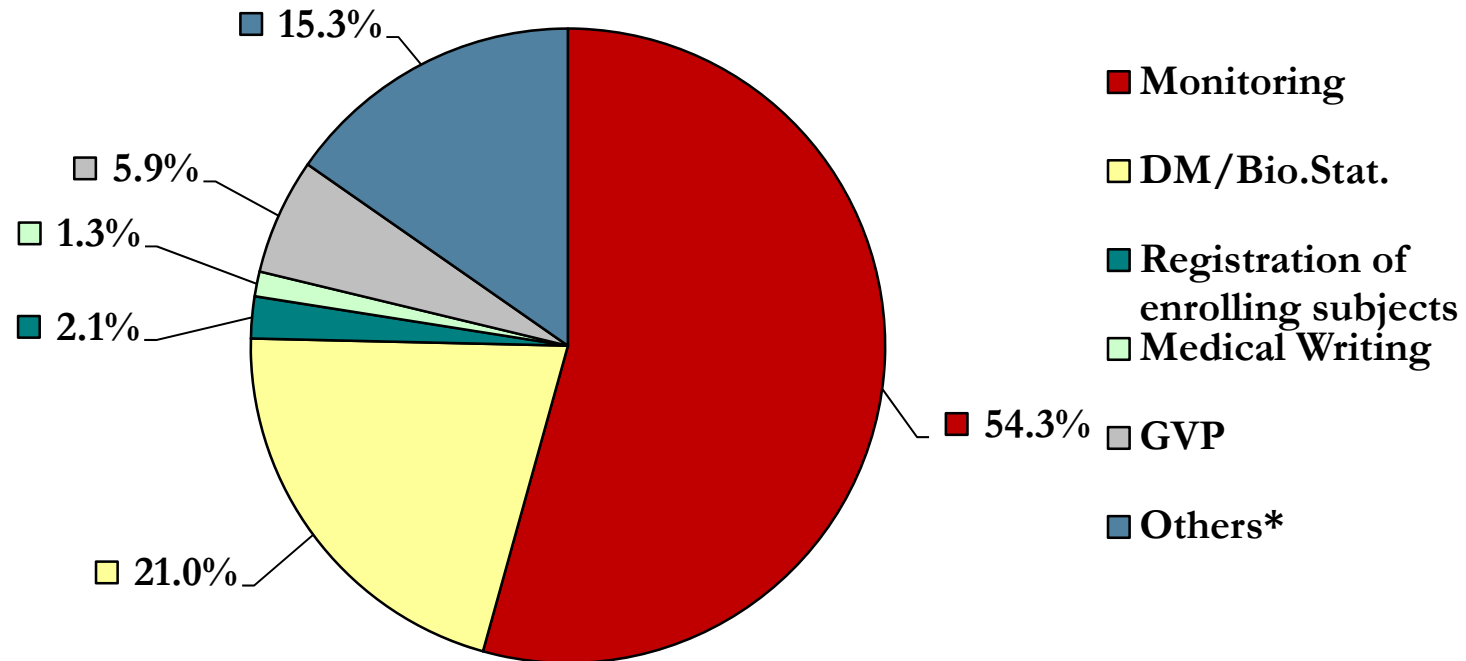
Sales by Business fields 2009-2013

(Sales Unit : 100 Mil.¥)



2013 Medical Products/Devices/Food & Nutrition-Supplement Sales by Business Services

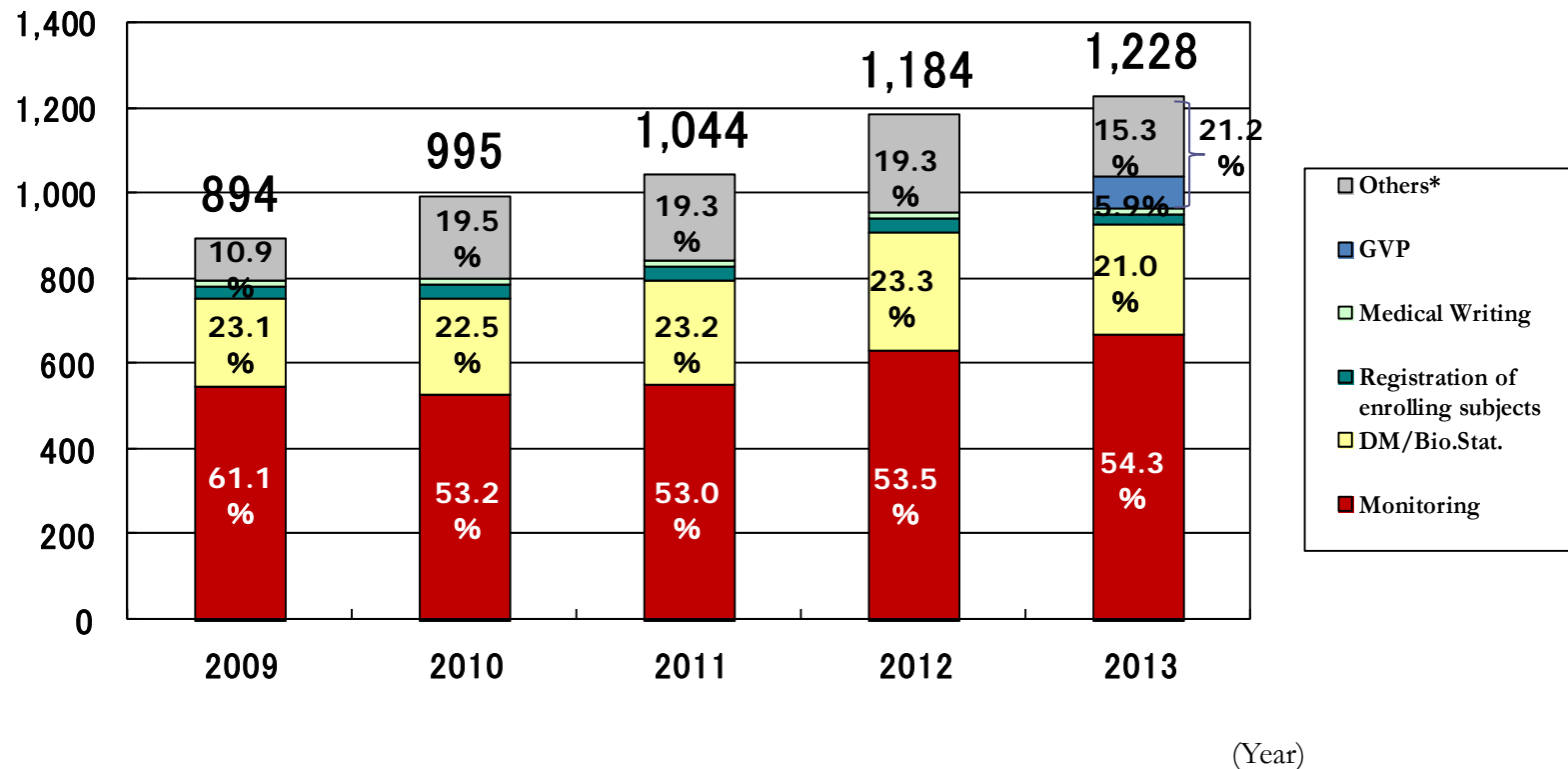
Total: 122,800 Mil.¥



*Business activities relating to GVP were newly categorized from others since 2013.

Medical Products/Devices/Food & Nutrition-Supplement Sales by Clinical Services 2009-2013

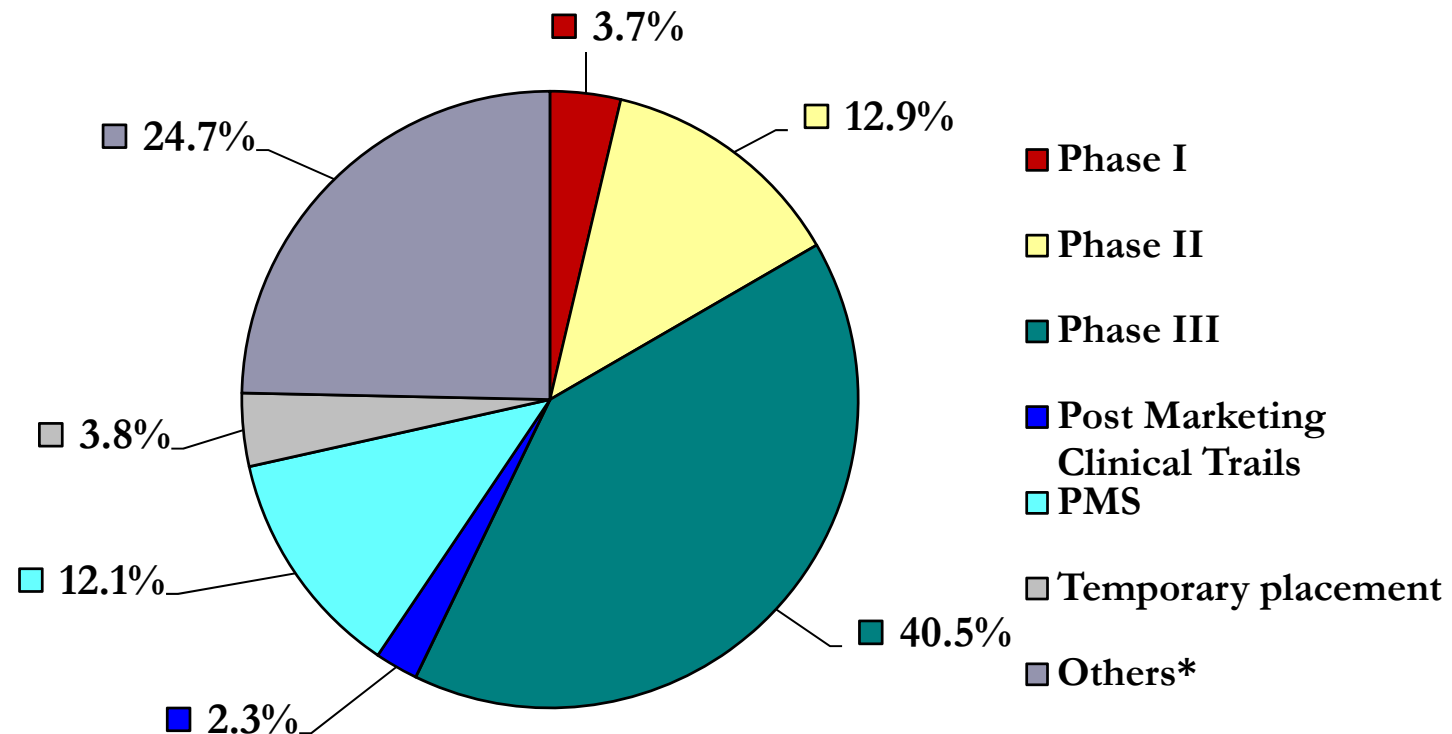
(Sales Unit: 100 Mil.¥)



*Business activities relating to GVP were newly categorized from others since 2013.

2013 Medical Products Sales by Clinical Phases

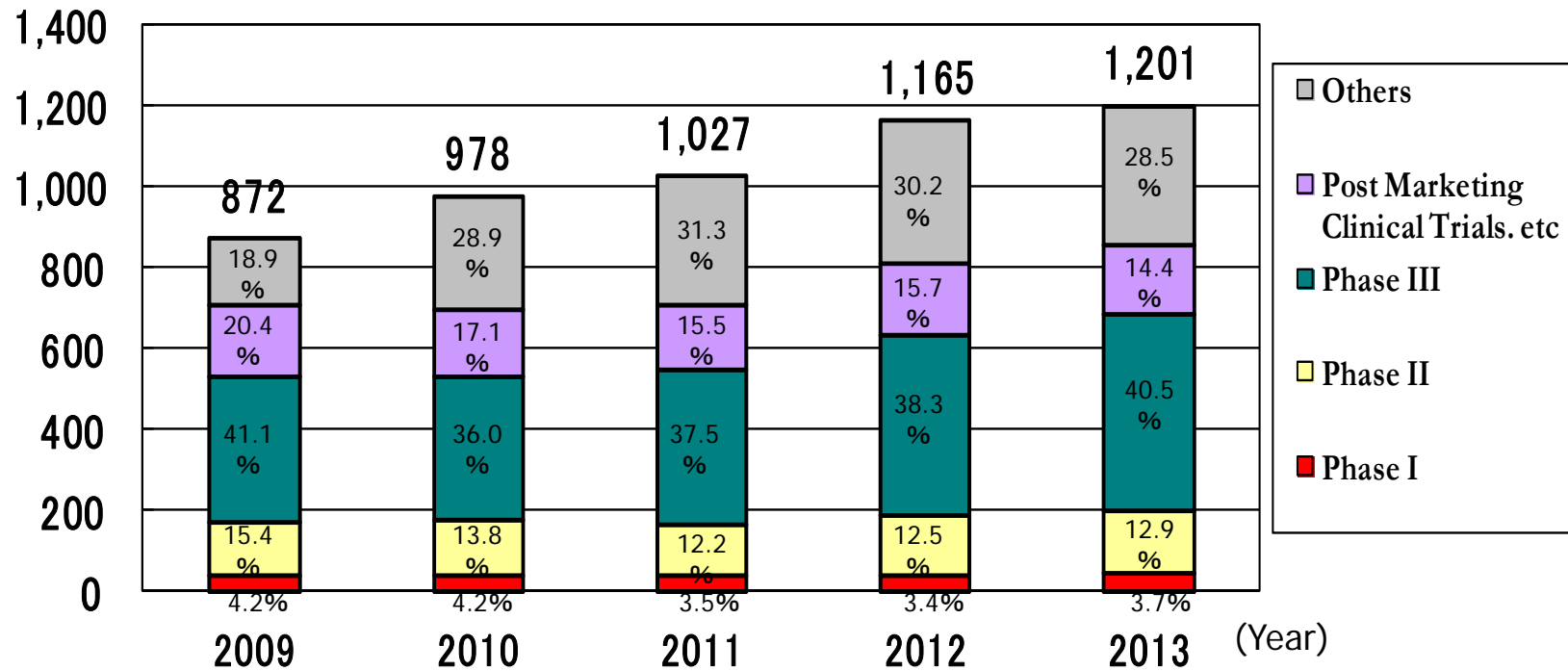
Total: 120,100 Mil.¥



*Others: Academic clinical researches, audit, consultation, education and training, IT support-system building, translation, BE studies, Randomization, clinical laboratory testing. etc.

Medical Products Sales by Clinical Phases 2009-2013

(Sales Unit: 100 Mil.¥)



Other services Conducted in relation to Medical Products

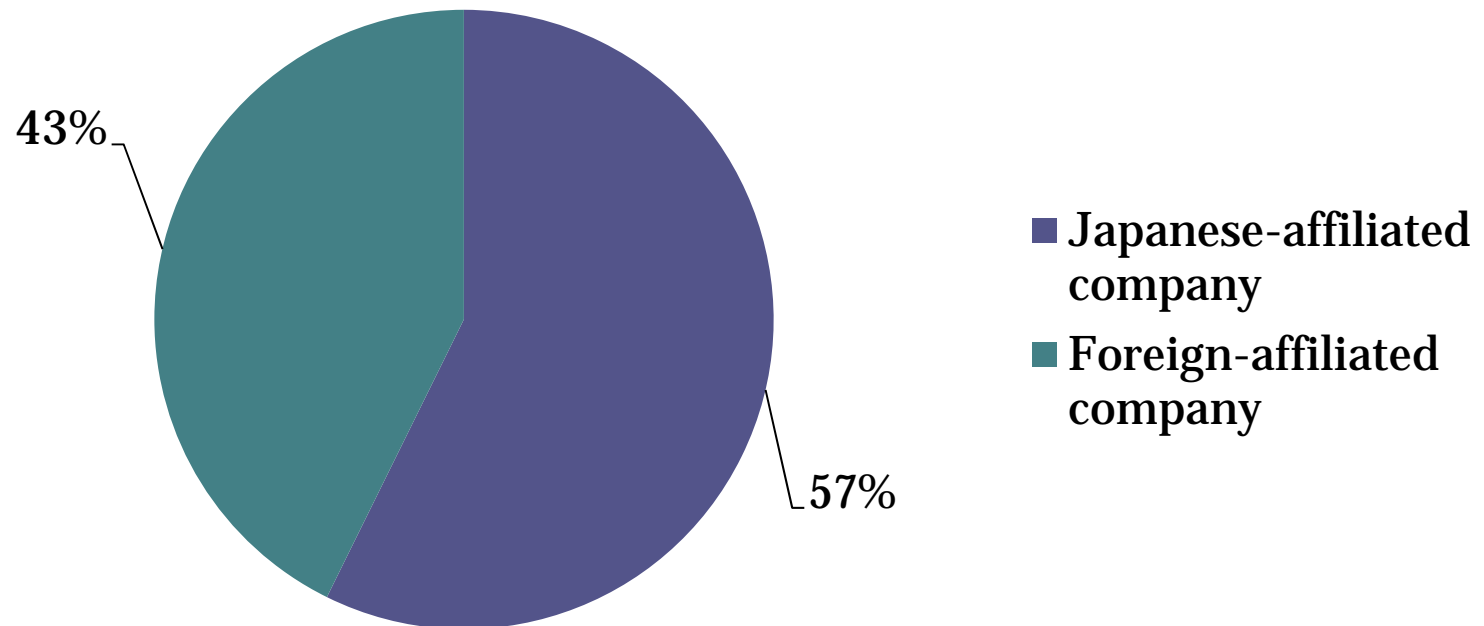
(No. represent the number of CRO conducting those business services.)

Business services	No.	Business services	No.
Academic clinical research	14	Transportation and storage of IMP	8
Audit(including self-check)	13	SOP preparation	6
Consultation	11	Re-examination documents preparation	6
Education & training	10	Holding research conference	5
IT support-system building, excluding EDC	10	MF application, generics application	5
Translation	10	Establishing analytical methods, validation	5
BE studies	9	Recruiting clinical study subjects, site-selection	5
Randomization	9	Project management	4
Academic papers writing	8	Clinical Trial In-Country Care-taker	3

Also include Clinical laboratory testing, image analysis and epidemiological study, etc.

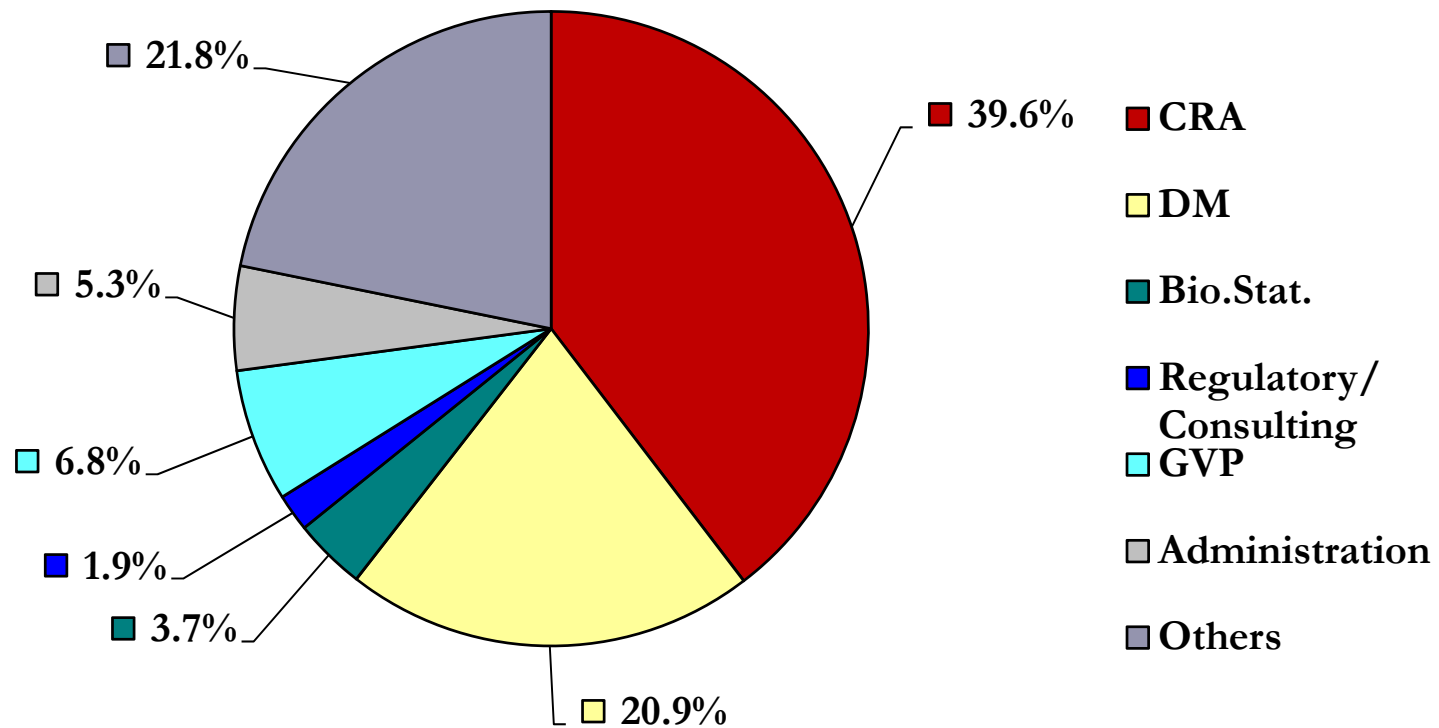
Ratio of total sales volume by client groups

Sales volume

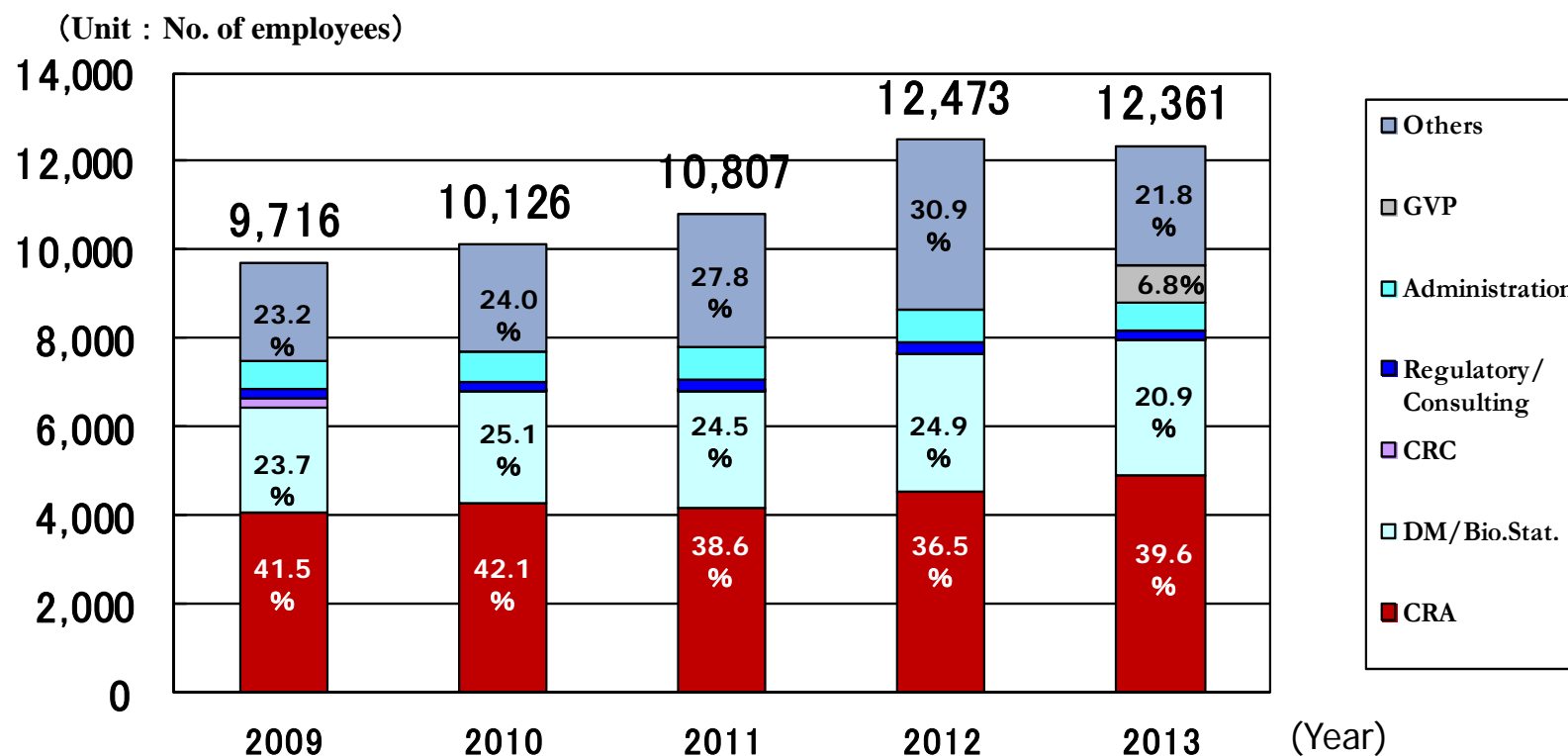


2013 Employees by Business Services

Total No. of employees: 12,361



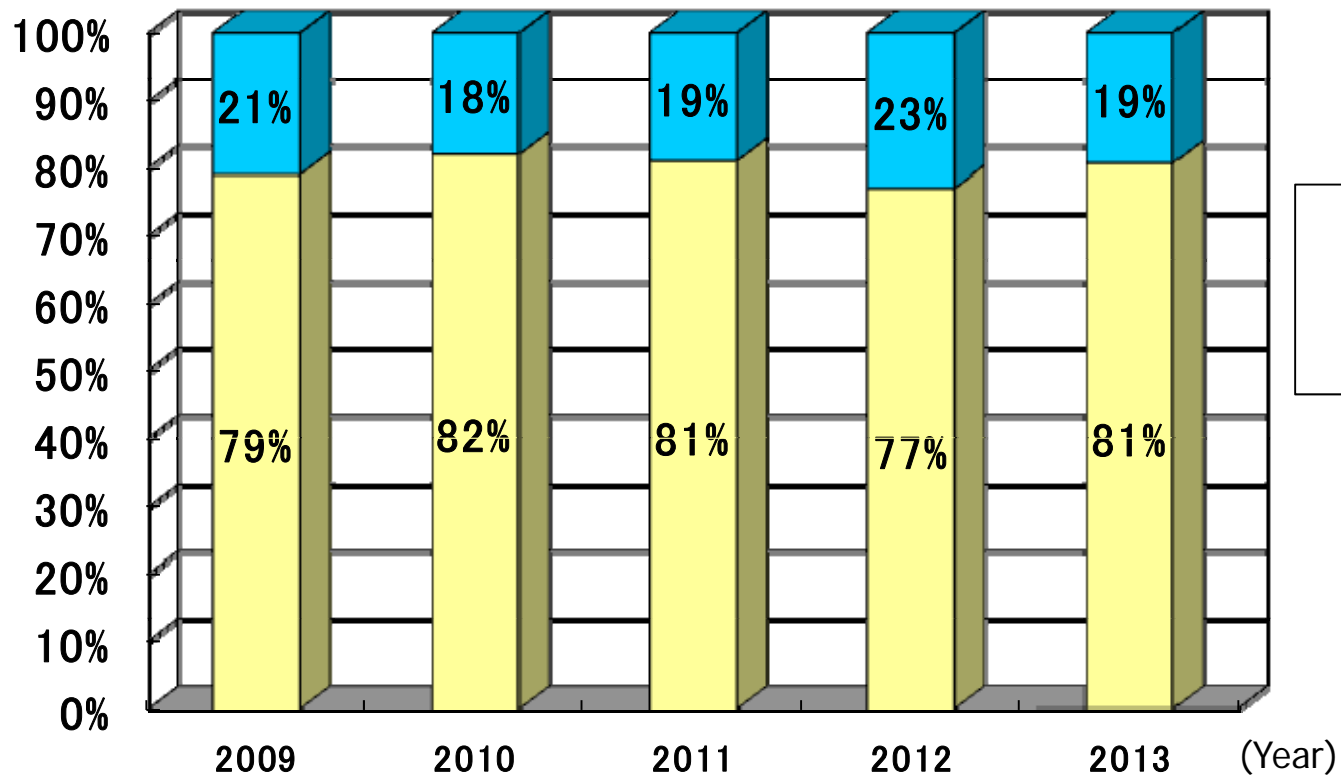
Employees by Business Services 2009-2013



*Business activities relating to GVP were newly categorized from others since 2013.

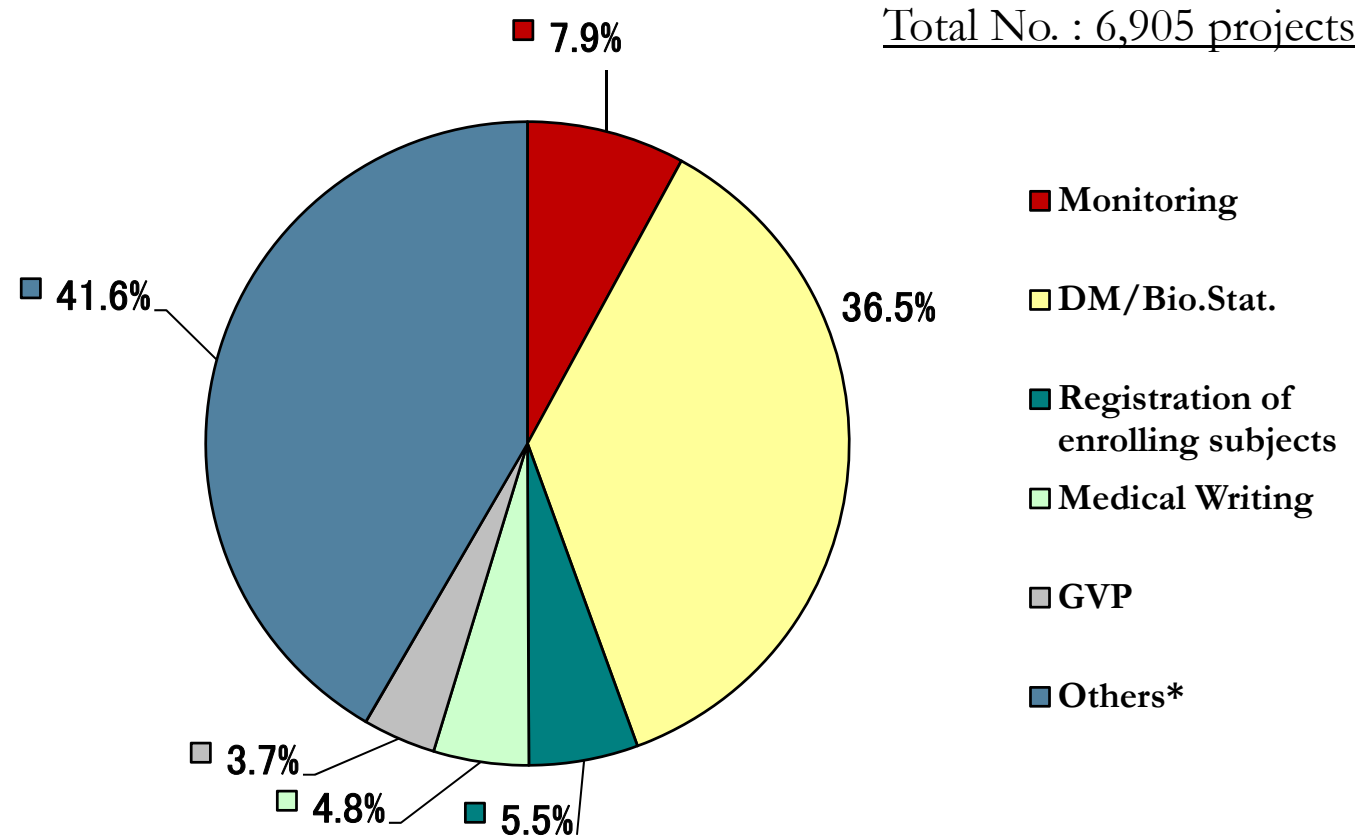
Employment Pattern 2009-2013

2013 Total No. of employees :12,361



2013 Medical Products/Devices/Food & Nutrition-Supplement Outsourced Projects by Business Services

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

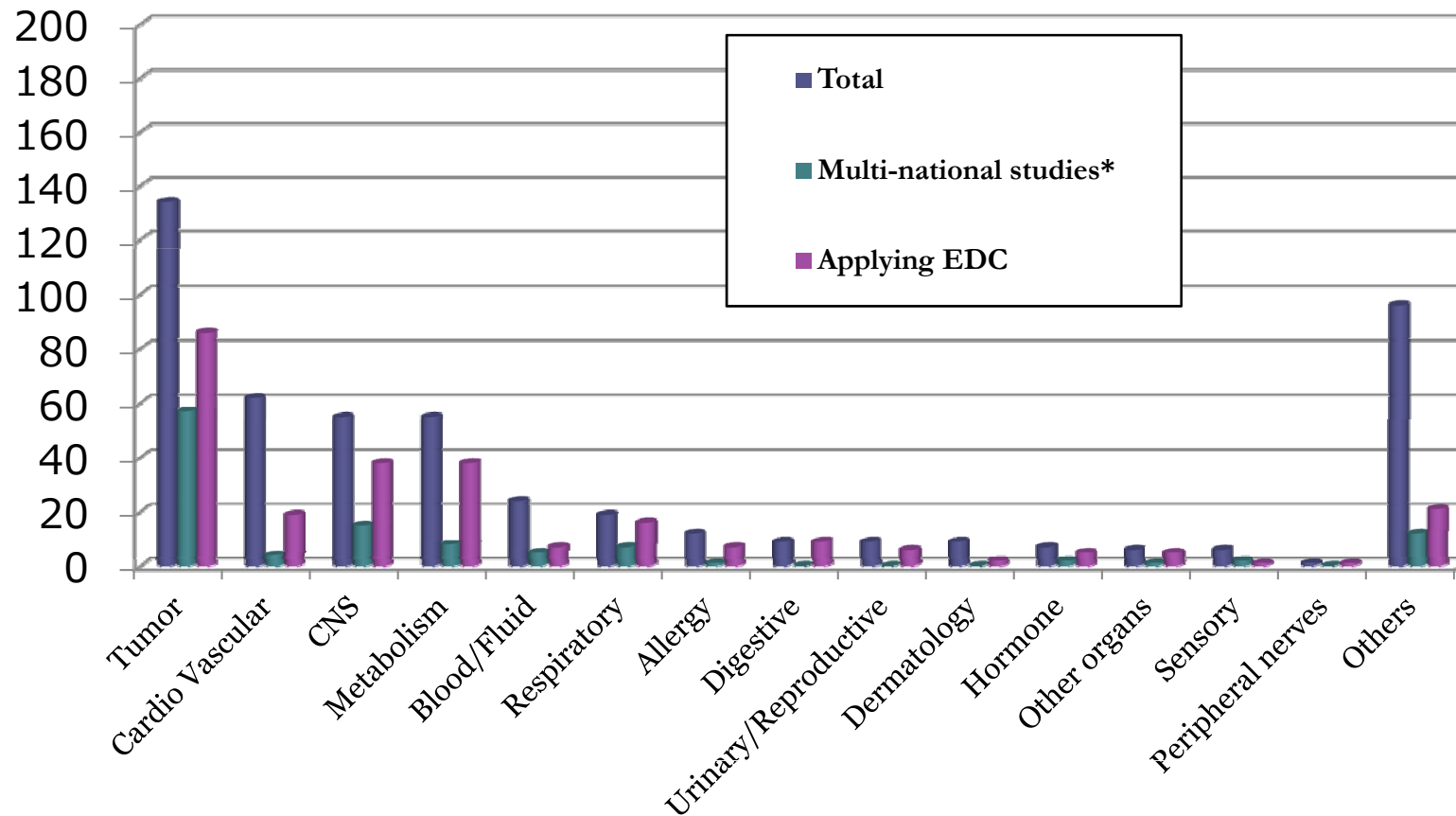


*Others: Academic clinical researches, audit, consultation, education and training, IT support-system building, translation, BE studies, Randomization, clinical laboratory testing. etc.

2013 Monitoring Projects* by Therapeutic Area

- Only valid responded projects, 504, are categorized out of total monitoring projects .
- * Multi-National Studies: Studies conducted in multi countries simultaneously with the same protocol.

(Units: No. of projects)



2013 Monitoring Projects* by Clinical Phases

Note: Only valid responded projects, 504, are categorized out of total monitoring projects.

