

The Pharma Letter

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Most admired Pharma companies in Japan, by P Reed Maurer

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For 14 years International Alliances Limited (IAL), headed by P Reed Maurer, has conducted an annual survey to determine the most admired pharma companies in Japan. Each year, IAL evaluate 30 companies, 15 Japanese and 15 foreign affiliated firms. In 2012, says Mr Maurer it included the firms listed below:

Japanese: Asahi Kasei, Astellas, Daiichi Sankyo, Dainippon Sumitomo, Eisai, Kissei, Kyorin, Kyowa Hakko Kirin, Mitsubishi Tanabe, Mochida, Otsuka, Santen, Shionogi, Takeda, Zeria.

Foreign: Abbott (from now own to be known as AbbVie), Alcon, AstraZeneca, Bayer, Bristol-Myers, Chugai (Roche-group), Eli Lilly, GlaxoSmithKline, Merck & Co (called MSD outside North America), Boehringer Ingelheim, Novartis, Novo Nordisk, Pfizer, Sanofi, UCB.

Three different groups respond to the survey, ie, employees of pharma companies, wholesaler employees, and people who provide various services to the pharma industry. "We believe these industry 'insiders' are well informed and qualified to objectively evaluate company performance in each of seven categories, ie, Quality of Management, Quality of Products, Potential for Growth, New Drug Discovery Potential, Quality of Development, Quality of MRs, and Profitability in the Future," says Mr Maurer.

This summary of only the top companies is the combined ranking by the three different types of responders in each performance category. The full report gives the scores by each group of responders and includes all 30 companies since 2003. The trend of performance over time is more instructive than the snapshot of results in 2012. The full report is available from IAL for 31,500 yen (incl. tax), and 3,000 yen of the purchase price will be donated to the Children's Cancer Association in Japan. To order check our web site at http://ial-japan.com/image_survey.html .

Total Average Score Ranking

For 13 years Takeda was the sole leader as the most admired company in Japan although its ranking in Total Average Score was slowly eroding. Finally in 2012, the 14th year, Takeda shared the lead with Novartis. Takeda, as noted below, was hurt by its ranking in Potential for Growth, and New Drug Discovery Potential. Novartis benefitted from a clear lead in the Profitability in the Future category.

The second place in the ranking was shared by GSK and Astellas. Third place was shared by Chugai, Pfizer and MSD. Daiichi Sankyo was next, and Eisai, AstraZeneca and Sanofi rounded out the top 10 tier. Of all of these, MSD made the most dramatic improvement moving up from the 11th position in 2011.

Quality of Management

1. Takeda
2. Astellas
3. Eisai
3. Chugai
5. GlaxoSmithKline
5. Novartis
5. Pfizer
8. Sanofi
8. Daiichi Sankyo
8. Otsuka

The top 10 are evenly split between Japanese and foreign firms, but the top three are Japanese.

Quality of Products

1. Chugai
1. Takeda
1. Novartis
1. GlaxoSmithKline
1. MSD
1. Pfizer
7. Astellas
8. AstraZeneca
8. Daiichi Sankyo
8. Sanofi

Eisai dropped out of the top 10 tier and was replaced by Sanofi. MSD moved up from 5, and Pfizer from 7 to the leading position.

Potential for Growth

1. Novartis
1. GlaxoSmithKline
3. Chugai
3. MSD
5. Takeda
5. Sanofi
5. Pfizer
5. Astellas
9. Daiichi Sankyo
10. Kyowa Hakko Kirin

AstraZeneca dropped out of the top 10 tier. GSK replaced Chugai for a share of the lead. Astellas, new to the top 10 in 2011 further improved its position.

New Drug Discovery Potential

1. Novartis
2. GlaxoSmithKline
3. MSD

4. Takeda
5. Chugai
5. Pfizer
7. Astellas
7. Sanofi
9. AstraZeneca
9. Daiichi Sankyo
9. Kyowa Hakko Kirin

This category is typically dominated by foreign firms with Novartis leading the group. Astellas was newly ranked in the top 10 tier in 2012.

Quality of Development

1. Takeda
1. Novartis
3. GlaxoSmithKline
4. Chugai
4. Pfizer
6. Astellas
6. Daiichi Sankyo
6. MSD
9. Eisai
9. AstraZeneca
9. Sanofi

In this category there was no change in the leading companies since 2010. MSD improved while Eisai, AstraZeneca and Sanofi declined their relative positions,

Quality of MRs (medical representatives)

1. Takeda
2. Astellas
3. Daiichi Sankyo
4. Eisai
5. Chugai
5. Pfizer
7. Novartis
7. GlaxoSmithKline
9. Shionogi
9. AstraZeneca
9. MSD
9. Otsuka

Japanese companies dominate this category and Takeda is again the clear leader. Shionogi's position continues to erode. MSD was newly ranked in the top 10 tier. This was the poorest category ranking for Novartis.

Profitability in the Future

1. Novartis
2. Takeda
3. GlaxoSmithKline
3. MSD
3. Astellas
6. Chugai
6. Pfizer
8. Daiichi Sankyo
8. Sanofi
10. AstraZeneca
10. Kyowa Hakko Kirin
10. Otsuka

Novartis moved up to the leading position replacing Chugai which dropped to 6. MSD and Astellas moved up to number 3. Kyowa Hakko Kirin and Otsuka were newly ranked in the top 10 tier.

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