



Roche Roche Group

Nomura Investment Forum 2009

CHUGAI PHARMACEUTICAL CO.,LTD.
President and CEO
Osamu Nagayama

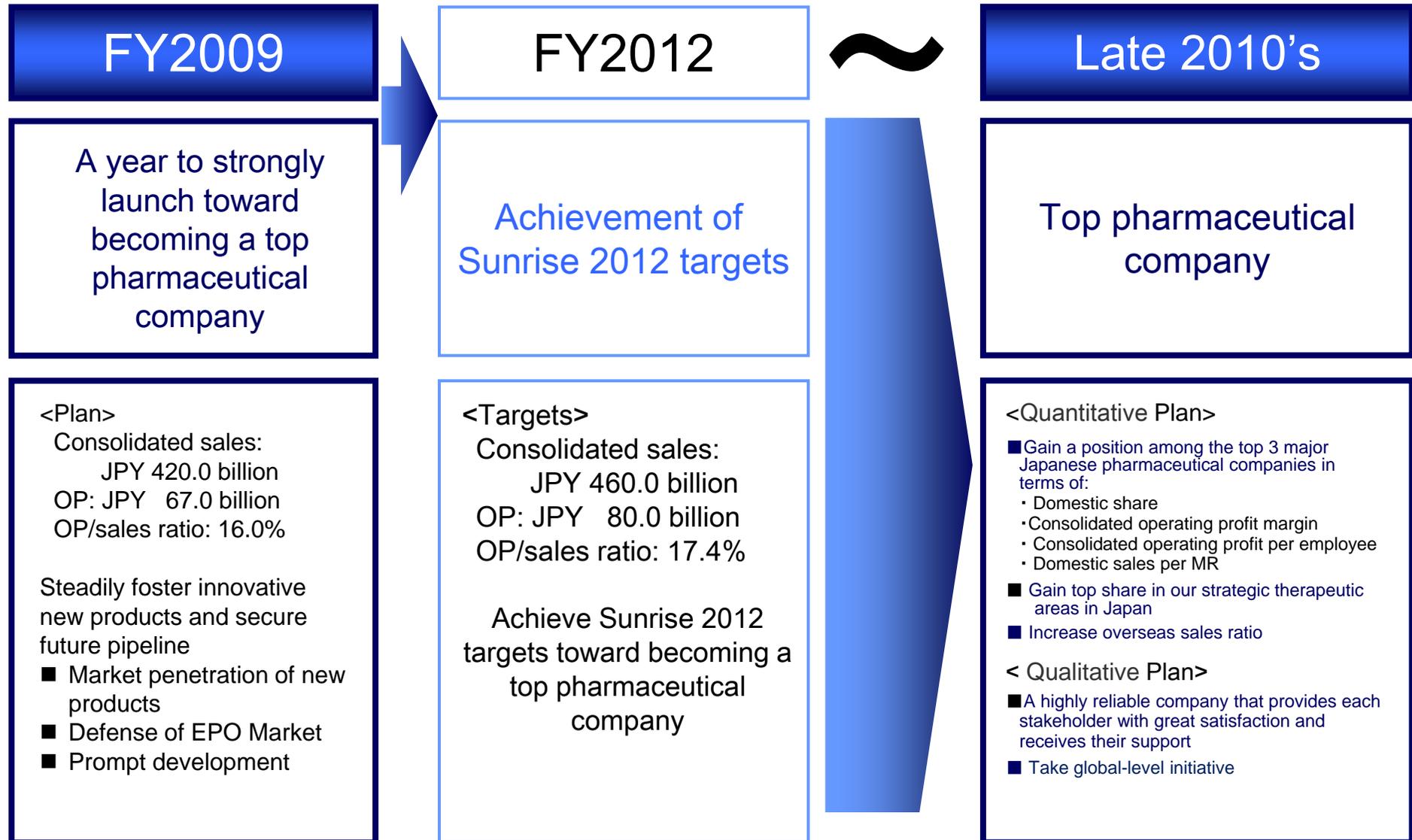
2009.12.01

Forward-Looking Statements



This presentation may include forward-looking statements pertaining to the business and prospects of Chugai Pharmaceutical Co., Ltd. (the “Company”). These statements reflect the Company’s current analysis of existing information and trends. Actual results may differ from expectations based on risks and uncertainties that may affect the Company’s businesses.

Steps Toward Achieving Sunrise 2012 Targets and Further Growth



Steps Toward Becoming a Top Japanese Pharmaceutical Company

- Achievements in 2009 -



R&D

☆ Strengthened R&D foundation

- Enhanced drug discovery technology
 - Good progress in projects of new development areas (diabetes, CNS)
- ⇒ Enriched pipeline
- 9 global development projects on-going
 - 4 new projects entered phase I

Production

☆ Reestablished development & manufacturing function

- Established Pharmaceutical Technology Division
- ⇒ A comprehensive structure from development to manufacturing to achieve global level competitiveness (cost, speed and quality)

Sales & Marketing

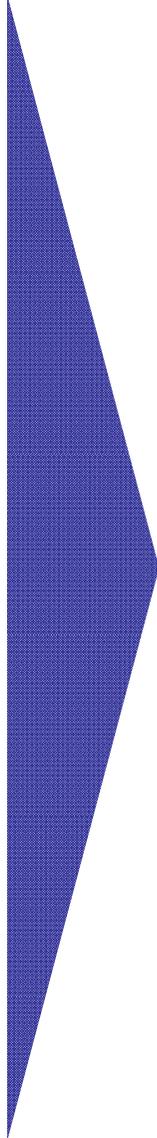
☆ Strengthened marketing structure with further focus on disease areas

- Establishment of Primary Unit; Two-Unit structure with Oncology Unit
 - Increased number of Oncology MRs (from 500 to 550)
- ⇒ Enhanced operational power in implementing product promotion in each area

Safety Management

☆ Strengthened safety management structure

- Restructured Corporate Regulatory Compliance & Quality Assurance Division and established Regulatory & Quality Management Unit and Drug Safety Division
- ⇒ Enhanced medical evaluation of safety information to support safety when nurturing products



Improvement of
operational power
of each function

As a leader in Oncology

As a leading company in Oncology*, Chugai continuously provides innovative products with high utility as well as information to help promote standard treatment

★To provide Japanese patients access to treatments of global standard

Oct 1, 2009 Establishment of
“Chugai Academy for Advanced Oncology”



To support the establishment of medical foundation and advancement of Japanese oncology, in new ways

Main activities

- Oncology Forum
- Financial contribution for oncology research

★Branding activities



中外製薬 | ロシュグループ

CHUGAI ONCOLOGY

がんに関心のある患者さんに
希望をお届けするのも、私たちの仕事です。

私たち中外製薬は、革新的な医薬品の研究開発・生産・情報提供はもとより、患者さんやご家族、医療関係者に向けたセミナーの開催、最新がん医療の紹介など、さまざまな支援活動を行っています。

がん医療の最前線で、ともに。
中外オンコロジー

がん情報ガイド <http://gan-guide.jp>

ONCOLOGY (オンコロジー) は、羅威字・がん研究を表す言葉です。



★Website dedicated to oncology for patients

URL: <http://gan-guide.jp>



★Employee involvement in social activities to help cancer patients



* Chugai has a top market share since 2008

Framework for 2010

Impact to Pharma Industry

- Change of Government
 - Review of allocation of total medical budget
 - Price reduction of long-listed drugs/ new drug price scheme
 - Expectation to life science as a growth strategy
- 2010 drug price revision
- Generic competition (“2010 issue”)



Impact to Chugai positives & negatives

- ◆ Growth of new products
 - Avastin, Herceptin, Tarceva, Xeloda, Actemra, Pegasys, Copegus
- ◆ Actemra
 - Growth in overseas market
- ◆ Enriched pipeline

- ◆ Tamiflu (stockpile)
- ◆ A new competitor to Epogin
- ◆ Additional price cut due to market expansion

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