FY2008 Consolidated Financial Overview

CHUGAI PHARMACEUTICAL CO., LTD.
Executive Vice President and CFO
Ryuzo Kodama

February 4/5, 2009
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.

Note: Amounts are rounded to the nearest 0.1 billion yen.
% is calculated based on amounts shown.
## Financial Overview  Jan – Dec

<table>
<thead>
<tr>
<th></th>
<th>Jan - Dec 2007 (Billion JPY)</th>
<th>Jan - Dec 2008 (Billion JPY)</th>
<th>Variance (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenues</strong></td>
<td>344.8</td>
<td>326.9</td>
<td>-17.9</td>
</tr>
<tr>
<td>Sales</td>
<td>332.9</td>
<td>321.8</td>
<td>-11.1</td>
</tr>
<tr>
<td>Excl. Tamiflu</td>
<td>294.3</td>
<td>313.4</td>
<td>+19.1</td>
</tr>
<tr>
<td>Tamiflu</td>
<td>38.7</td>
<td>8.4</td>
<td>-30.3</td>
</tr>
<tr>
<td>Royalties and OOI*</td>
<td>11.9</td>
<td>5.1</td>
<td>-6.8</td>
</tr>
<tr>
<td><strong>Operating Income</strong></td>
<td>66.7</td>
<td>51.6</td>
<td>-15.1</td>
</tr>
<tr>
<td>Non-operating Income</td>
<td>4.3</td>
<td>9.9</td>
<td>+5.6</td>
</tr>
<tr>
<td>Non-operating Expenses</td>
<td>3.3</td>
<td>4.2</td>
<td>+0.9</td>
</tr>
<tr>
<td><strong>Recurring Profit</strong></td>
<td>67.7</td>
<td>57.3</td>
<td>-10.4</td>
</tr>
<tr>
<td>Extraordinary Gain</td>
<td>0.3</td>
<td>7.3</td>
<td>+7.0</td>
</tr>
<tr>
<td>Extraordinary Loss</td>
<td>1.6</td>
<td>1.4</td>
<td>-0.2</td>
</tr>
<tr>
<td><strong>Net Income</strong></td>
<td>40.1</td>
<td>39.3</td>
<td>-0.8</td>
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<table>
<thead>
<tr>
<th></th>
<th>(Billion JPY)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales excl. Tamiflu</td>
<td>+19.1</td>
<td>Refer to P.4</td>
</tr>
<tr>
<td>Royalties and OOI</td>
<td>-6.8</td>
<td>Decrease in milestone income</td>
</tr>
<tr>
<td>Operating Income</td>
<td>-15.1</td>
<td>Refer to P.5</td>
</tr>
<tr>
<td>Non-operating Inc. / Exp.</td>
<td>+4.7</td>
<td>Gain on foreign exchanges</td>
</tr>
<tr>
<td>Extraordinary Gain / Loss</td>
<td>+7.1</td>
<td>Gain on settlement of co-development costs for Actemra</td>
</tr>
</tbody>
</table>

* other operating income

Average rate (Jan. 1 – Dec. 31, 2008) 103.44 JPY/USD, 189.85 JPY/GBP, 95.54 JPY/CHF, 151.38 JPY/EUR
Major Products Sales, Variance Year on Year

(Billion JPY)

Jan-Dec 2007 Jan-Dec 2008

Chugai's Share in the domestic oncology market*: 15.8% (1st place)**

* The scope of the market is defined by Chugai.
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**Operating Income Jan – Dec**

<table>
<thead>
<tr>
<th></th>
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<tbody>
<tr>
<td>Revenues</td>
<td>344.8</td>
<td>326.9</td>
<td>-17.9</td>
</tr>
<tr>
<td>Cost of Sales</td>
<td>137.3</td>
<td>127.0</td>
<td>-10.3</td>
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<tr>
<td><strong>Gross Profit</strong></td>
<td></td>
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<td>(-)</td>
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<tr>
<td>Sales</td>
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<td>194.8</td>
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<tr>
<td>Royalties and OOI*</td>
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<td>-6.8</td>
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<td>SG&amp;A expenses</td>
<td>86.6</td>
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<td>R&amp;D expenses</td>
<td>54.2</td>
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<td>-1.0</td>
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<tr>
<td><strong>Operating Income</strong></td>
<td>66.7</td>
<td>51.6</td>
<td>-15.1</td>
</tr>
</tbody>
</table>

Special factors
- Decrease in Tamiflu and Epogin sales
- Return of sanofi-aventis products
- Increase in Gross Profit from new products etc.
- Increase in SG&A expenses
- Increase in R&D expenses

Other operating income
- Increase of co-development themes
- Decrease in development costs of Actemra
## Financial Overview  Oct – Dec (4th Quarter)

<table>
<thead>
<tr>
<th>(Billion JPY)</th>
<th>Oct - Dec 2007</th>
<th>Oct - Dec 2008</th>
<th>Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>As % of Revenues</td>
<td>As % of Revenues</td>
<td>(%)</td>
</tr>
<tr>
<td><strong>Revenues</strong></td>
<td>94.4</td>
<td>97.3</td>
<td>+2.9</td>
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<tr>
<td>Sales</td>
<td>90.1</td>
<td>97.0</td>
<td>+6.9</td>
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<tr>
<td>Excl. Tamiflu</td>
<td>83.3</td>
<td>90.3</td>
<td>+7.0</td>
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<tr>
<td>Tamiflu</td>
<td>6.8</td>
<td>6.7</td>
<td>-0.1</td>
</tr>
<tr>
<td>Royalties and OOI*</td>
<td>4.3</td>
<td>0.3</td>
<td>-4.0</td>
</tr>
<tr>
<td><strong>Operating Income</strong></td>
<td>17.7</td>
<td>18.8</td>
<td>-6.0</td>
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<tr>
<td>Non-operating Income</td>
<td>1.3</td>
<td>5.6</td>
<td>+4.3</td>
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<tr>
<td>Non-operating Expenses</td>
<td>2.3</td>
<td>2.8</td>
<td>+0.5</td>
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<td><strong>Recurring Profit</strong></td>
<td>16.7</td>
<td>17.7</td>
<td>14.6</td>
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<td>Extraordinary Gain</td>
<td>0.0</td>
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<td>+0.0</td>
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<tr>
<td>Extraordinary Loss</td>
<td>0.4</td>
<td>1.1</td>
<td>+0.7</td>
</tr>
<tr>
<td><strong>Net Income</strong></td>
<td>9.8</td>
<td>10.4</td>
<td>9.1</td>
</tr>
</tbody>
</table>

**Variance**

- **Sales excl. Tamiflu**: +7.0
  - Avastin: +5.1
  - Herceptin: +3.1
  - Epogin: -2.3
  - Actemra: +3.6
- **Royalties and OOI**: -4.0
  - Decrease in milestone income
- **Operating Income**: -6.0
  - Refer to P.7
- **Non-operating Inc. / Exp.**: +3.7
  - Gain on foreign exchanges
- **Extraordinary Gain / Loss**: -0.7
  - Loss on office realignment costs

* other operating income
Operating Income  Oct – Dec (4th Quarter)

(Billion JPY)

- Increase in Gross Profit from Sales: +3.7
- Decrease in Royalties and OOI*: -4.0
- Increase in SG&A expenses: -4.3
- Increase in R&D expenses: -1.5

(Billion JPY)  Variances

<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>Revenues</td>
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<td>36.3</td>
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<tr>
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<td>58.0</td>
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<tr>
<td>Sales</td>
<td>53.8</td>
<td>57.5</td>
<td>+3.7</td>
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<tr>
<td>Royalties and OOI‡</td>
<td>4.3</td>
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<td></td>
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<tr>
<td>SG&amp;A expenses</td>
<td>24.9</td>
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<td>+4.3</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>+17.3</td>
</tr>
<tr>
<td>R&amp;D expenses</td>
<td>15.4</td>
<td>16.9</td>
<td>+1.5</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>+9.7</td>
</tr>
<tr>
<td>Operating Income</td>
<td>17.7</td>
<td>11.7</td>
<td>-6.0</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>-33.9</td>
</tr>
</tbody>
</table>

* other operating income

> Increase in Gross Profit from Sales  +3.7
> Increase in SG&A expenses -4.3
   Sales promotion for newly launched products etc.
   Increase in IT expenses
> Increase in R&D expenses -1.5
   Increase of preclinical themes
   Increase in depreciation
# Financial Overview Jan – Dec

<table>
<thead>
<tr>
<th>(Billion JPY)</th>
<th>Revised Forecast Jul. 31</th>
<th>Jan – Dec 2008</th>
<th>Variance</th>
<th>(Billion JPY)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>As % of Revenues</td>
<td>As % of Revenues</td>
<td>(%)</td>
<td></td>
</tr>
<tr>
<td><strong>Revenues</strong></td>
<td>326.0</td>
<td>326.9</td>
<td>+0.9</td>
<td>+0.3</td>
</tr>
<tr>
<td>Excl. Tamiflu</td>
<td>321.0</td>
<td>318.5</td>
<td>-2.5</td>
<td>-0.8</td>
</tr>
<tr>
<td>Tamiflu</td>
<td>5.0</td>
<td>8.4</td>
<td>+3.4</td>
<td>+68.0</td>
</tr>
<tr>
<td><strong>Operating Income</strong></td>
<td>48.0</td>
<td>51.6</td>
<td>+3.6</td>
<td>+7.5</td>
</tr>
<tr>
<td>Non-operating Income</td>
<td>-</td>
<td>9.9</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Non-operating Expenses</td>
<td>-</td>
<td>4.2</td>
<td>-</td>
<td>-</td>
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<tr>
<td><strong>Recurring Profit</strong></td>
<td>49.0</td>
<td>57.3</td>
<td>+8.3</td>
<td>+16.9</td>
</tr>
<tr>
<td>Extraordinary Gain</td>
<td>-</td>
<td>7.3</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Extraordinary Loss</td>
<td>-</td>
<td>1.4</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Net Income</strong></td>
<td>33.0</td>
<td>39.3</td>
<td>+6.3</td>
<td>+19.1</td>
</tr>
</tbody>
</table>

- **Revenues**: +0.9 ( +0.3% )
  - Tamiflu: +3.4
  - Rituxan: +1.1
  - Avastin: +1.1
  - Actemra: -0.9
  - Evista: -0.7
  - Neutrogin: -0.6

- **Operating Income**: +3.6 ( +7.5% )
  Refer to P.9

- **Non-operating Income / Expenses**: +4.7
  - Gain on foreign exchanges

vs. Forecast
FY2008 Consolidated Financial Overview

Operating Income Jan – Dec

<table>
<thead>
<tr>
<th>(Billion JPY)</th>
<th>Revised Forecast (Jul. 31)</th>
<th>Jan – Dec 2008</th>
<th>Variance (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenues</td>
<td>326.0</td>
<td>326.9</td>
<td>+0.9</td>
</tr>
<tr>
<td>Cost of Sales</td>
<td>130.0</td>
<td>127.0</td>
<td>-3.0</td>
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<tr>
<td>Gross Profit</td>
<td>196.0</td>
<td>199.9</td>
<td>+3.9</td>
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<tr>
<td>SG&amp;A expenses</td>
<td>94.5</td>
<td>95.1</td>
<td>+0.6</td>
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<tr>
<td>R&amp;D expenses</td>
<td>53.5</td>
<td>53.2</td>
<td>-0.3</td>
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<tr>
<td>Operating Income</td>
<td>48.0</td>
<td>51.6</td>
<td>+3.6</td>
</tr>
</tbody>
</table>

Increase in Gross Profit +3.9

Gain on foreign exchanges

Increase in SG&A expenses -0.6
Sales promotion for new products etc.

Decrease in R&D expenses +0.3
Decrease in development costs of Actemra

(Billion JPY)
## Impact from Foreign Exchange Rate

<table>
<thead>
<tr>
<th>(Billion JPY)</th>
<th>Vs. Revised Forecast (Jul. 31)</th>
<th>(Reference) Year on Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenues</td>
<td></td>
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<tr>
<td></td>
<td>-1.8</td>
<td>-1.9</td>
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<tr>
<td>Neutrogin (Overseas)</td>
<td>-1.0</td>
<td>Neutrogin (Overseas)</td>
</tr>
<tr>
<td>Actemra (Overseas)</td>
<td>-0.7</td>
<td>-1.7</td>
</tr>
<tr>
<td>Cost of sales</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SG&amp;A expenses</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Purchase Price Variance</td>
<td>+3.1</td>
<td>Purchase Price Variance</td>
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<tr>
<td>Unrealized Profit in Inv.</td>
<td>+1.3</td>
<td>Unrealized Profit in Inv.</td>
</tr>
<tr>
<td>SG&amp;A of overseas affiliates</td>
<td>+0.3</td>
<td>SG&amp;A of overseas affiliates</td>
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<td>Operating Income</td>
<td>+2.9</td>
<td>+0.8</td>
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<tr>
<td>Non-operating Inc. / Exp.</td>
<td></td>
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</tr>
<tr>
<td>Gain on foreign exchanges</td>
<td>+6.1</td>
<td>Gain on foreign exchanges</td>
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<td>Exchange Forward Contract</td>
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<td>Exchange Forward Contract</td>
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<tr>
<td>Recurring Profit</td>
<td>+7.4</td>
<td>+4.8</td>
</tr>
</tbody>
</table>

Amounts are our estimation.
Balance Sheet Items (Assets)

(Billion Yen)

- **Inventories**: +23.5
  - Increase in stock of Actemra, Tamiflu, etc.
  - Stockpiling for manufacturing site change

- **Tangible fixed assets**: +5.8
  - Solid pharmaceutical production lines (Fujieda)
  - Injection products building No.3 (Utsunomiya)
  - Formulation and packaging pilot plant No.2 (Ukima)
  - Bio-product technology research building No.2 (Ukima)

- **Marketable securities**: -10.8
- **Investment securities**: -2.4
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Balance Sheet Items (Liabilities)

(Billion Yen)

- **Accounts payable**: +11.5
  - Increase in balance of Avastin and Tamiflu

- **Accrued expenses**: +3.1
  - Increase in SG&A and R&D expenses

- **Other payables**: +1.9
  - Increase in capital expenditures

- **Accrued income taxes**: -4.9

Equity Ratio

<table>
<thead>
<tr>
<th>Year</th>
<th>Equity Ratio</th>
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<tbody>
<tr>
<td>Dec 2007</td>
<td>83.5%</td>
</tr>
<tr>
<td>Dec 2008</td>
<td>82.6%</td>
</tr>
<tr>
<td>Variance</td>
<td>-0.9%pts</td>
</tr>
</tbody>
</table>
Cash Flow Statement

(Billion Yen)

> Cash flow from operating activities +39.3
  • Income before income taxes and minority interests +63.1
  • Depreciation and amortization +20.1
  • Increase in working capital -15.8
    - Increase in notes and accounts receivable -2.5
    - Increase in inventories -25.6
    - Increase in notes and accounts payable +12.3
  • Income taxes paid -30.1

> Cash flow from investing activities -14.1
  • Decrease of marketable and investment securities +10.8
  • Acquisition of fixed assets -25.2

> Cash flow from financing activities -18.4
  • Payment of dividends -16.3
Dividend Policy

Policy

Considering medium-to-long-term strategic investment funding needs and earnings prospect, we aim to expand the return of profit for all shareholders and ensure a consolidated dividend payout ratio of …

(Current)
30% or more on average, taking account of short-term fluctuation in earnings by the effect of a flu epidemic.

(Revised)
around 40% on average.

Dividends for FY2008 (Forecast)  34 JPY (15+19)
2004-2008 Total (Forecast): Dividends 136 JPY (Excl. special dividends in FY 2005)
EPS 373.92 JPY  Dividend Ratio 36.4%

Dividends for FY2009 (Forecast)  34 JPY (17+17)
2005-2009 Total (Forecast): Dividends 152 JPY (Excl. special dividends in FY 2005)
EPS 385.07 JPY  Dividend Ratio 39.5%
## 2009 Forecast Jan – Dec

<table>
<thead>
<tr>
<th>(Billion JPY)</th>
<th>Jan - Dec 2008</th>
<th>Jan - Dec 2009</th>
<th>Variance</th>
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<tbody>
<tr>
<td></td>
<td>As % of Revenues</td>
<td>As % of Revenues</td>
<td>(%)</td>
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</tr>
<tr>
<td><strong>Revenues</strong></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>326.9</td>
<td>400.0</td>
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<td>Tamiflu</td>
<td>8.4</td>
<td>53.0</td>
<td>+44.6</td>
<td>+531.0</td>
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<tr>
<td>Royalties and OOI</td>
<td>5.1</td>
<td>9.7</td>
<td>+4.6</td>
<td>+90.2</td>
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<tr>
<td><strong>Cost of Sales</strong></td>
<td>127.0</td>
<td>176.0</td>
<td>+49.0</td>
<td>+38.6</td>
</tr>
<tr>
<td><strong>Gross Profit</strong></td>
<td>199.9</td>
<td>224.0</td>
<td>+24.1</td>
<td>+12.1</td>
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<tr>
<td>SG&amp;A expenses</td>
<td>95.1</td>
<td>100.5</td>
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</tr>
<tr>
<td>R&amp;D expenses</td>
<td>53.2</td>
<td>60.5</td>
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<td>+13.7</td>
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<tr>
<td><strong>Operating Income</strong></td>
<td>51.6</td>
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<tr>
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<td>39.3</td>
<td>40.0</td>
<td>+0.7</td>
<td>+1.8</td>
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<td>(EPS*)</td>
<td>72.04 JPY</td>
<td>73.42 JPY</td>
<td>1.38 JPY</td>
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Exchange rate assumption for 2009: 90.00 JPY/USD, 135.00 JPY/GBP, 85.00 JPY/CHF, 125.00 JPY/EUR

2009 Forecast

FY2008 Consolidated Financial Overview

Sales (Excl. Tamiflu) Jan – Dec

(Billion JPY)

2009 Forecast

Major Products Sales, Variance Year on Year
(Billion JPY)

( ) : FY2009 Forecast

Avastin
Actemra (Domestic)
Herceptin
Pegasys
Actemra (Export)
Copegus
Xeloda
Evista
Suvenyl
Tarceva
Femara

Sales
+23.9,+7.6%

313.4
335.0
42.3
24.0
50.0
61.3
102.3
337.3

Overseas
-5.8,-17.3%

Bone and Joint
+6.1,+25.4%

Renal diseases
+0.6,+1.0%

Oncology
+15.2,+14.9%

Others
-0.6,-1.4%

Transplant, Immunology and Infectious diseases
+6.1,+25.4%

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Contacts:

Corporate Communications Group
Tel: +81 (0)3-3273-0881  Fax: +81 (0)3-3281-6607  
e-mail: pr@chugai-pharm.co.jp
Masayuki Yamada, Seiji Shimada, Hiroshi Araki

Investor Relations Group
Tel: +81 (0)3-3273-0554  Fax: +81 (0)3-3281-6607  
e-mail: ir@chugai-pharm.co.jp
Mac Uchida, Kae Maeda, Tomoko Shimizu, Yusuke Tokita