



# Annual Report 2012 (Jan-Dec)

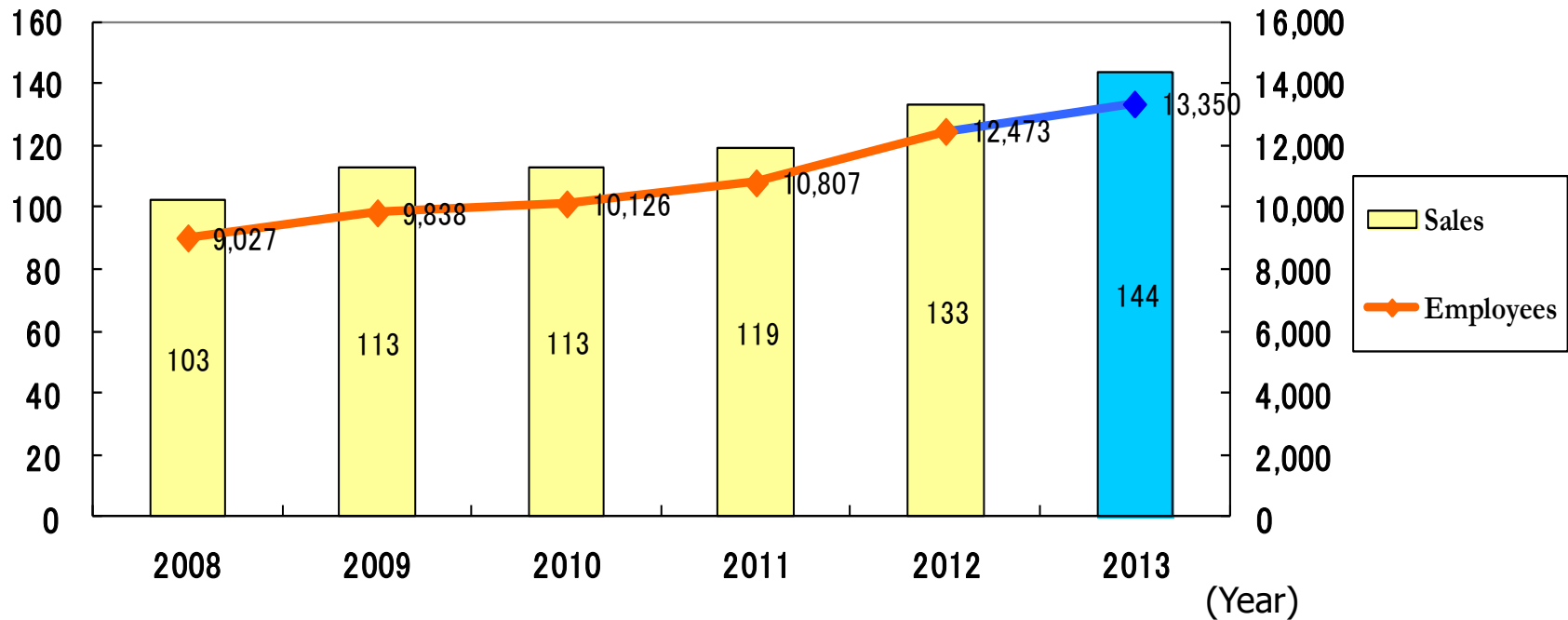
**April 26, 2013**

**Japan CRO  
Association**

# Sales and Employees 2008-2012

(Sales Unit: Bln.¥)

(Employee No.)

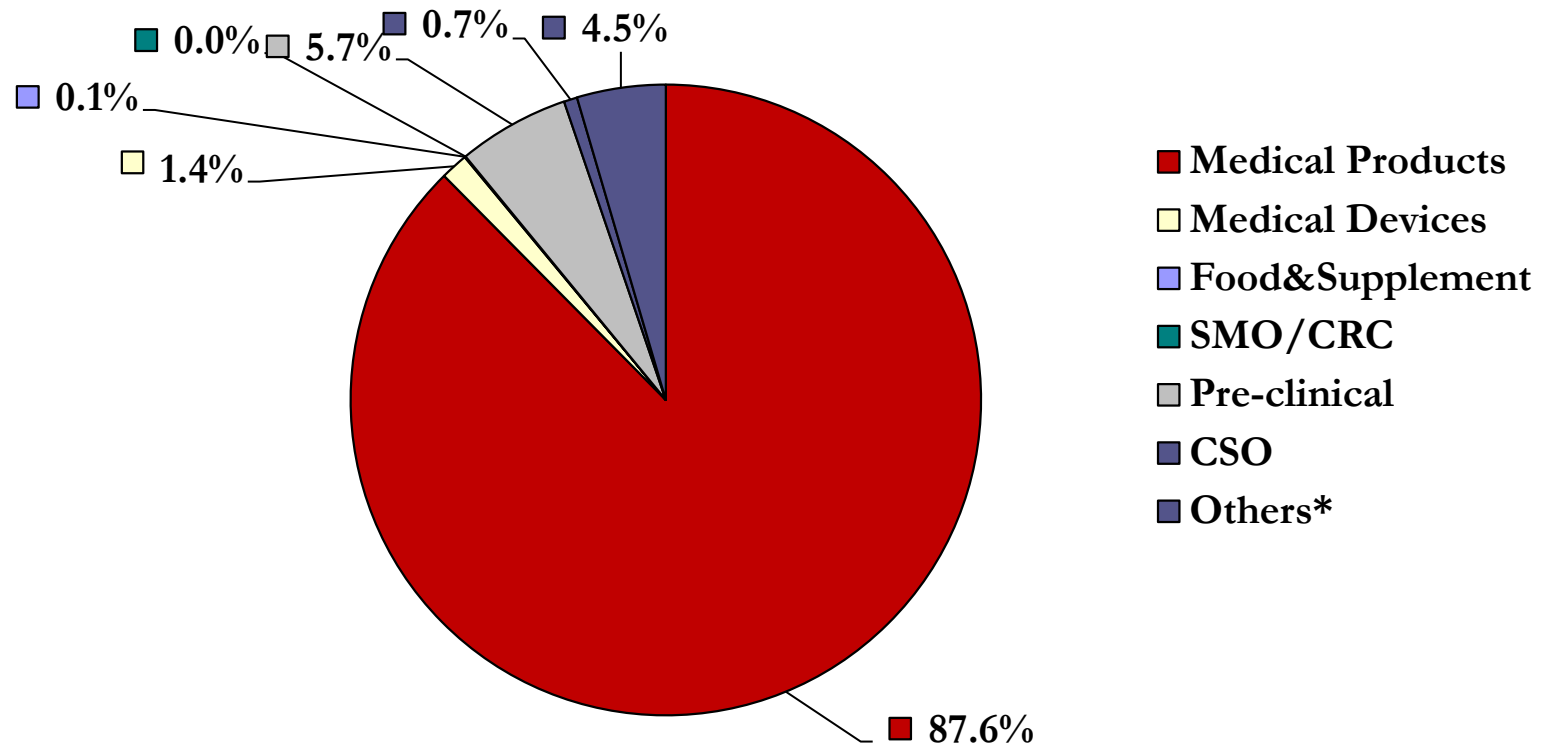


Estimate

Note) Count and estimate data of 40 companies in 2007, 39 in 2008, 33 in 2009, 26 in 2010 and 2011, 26 in 2012 and 2013

# 2012 Sales by Business Fields

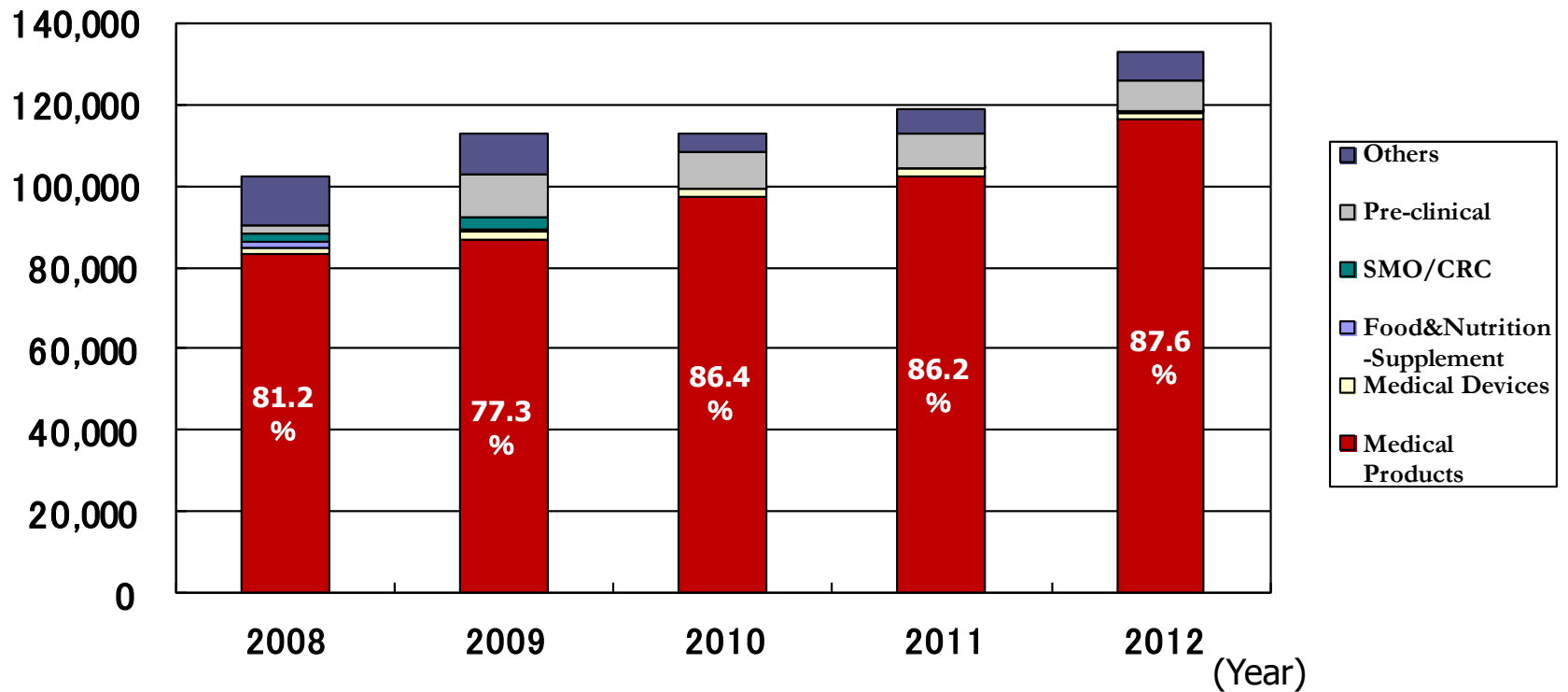
Total:133.0 BLN¥



\*Others: Database Business, Laboratory, System development, DI, DTC, Helpdesk, etc.  
(In Sales Amount Order)

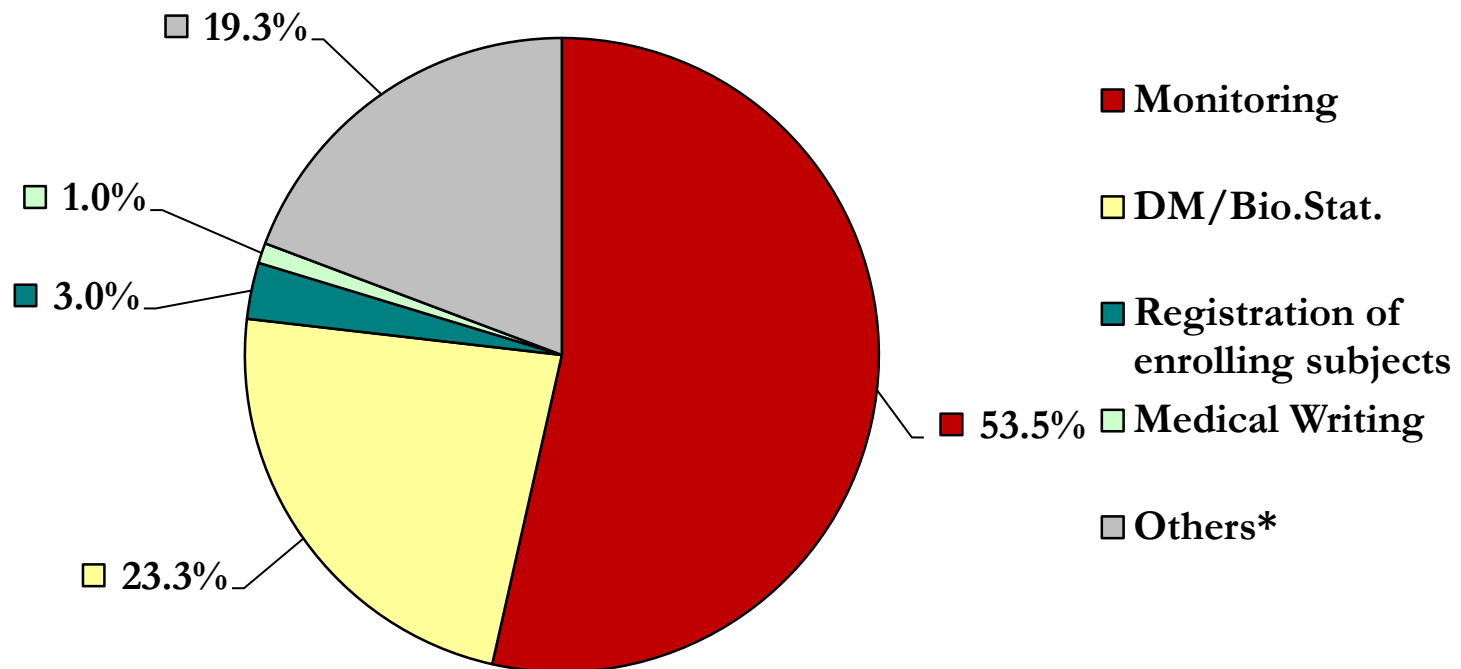
# Sales by Business fields 2008-2012

(Sales Unit : 1 Mil.¥)



## 2012 Medical Products/Devices/Food & Nutrition-Supplement Sales by Business Services

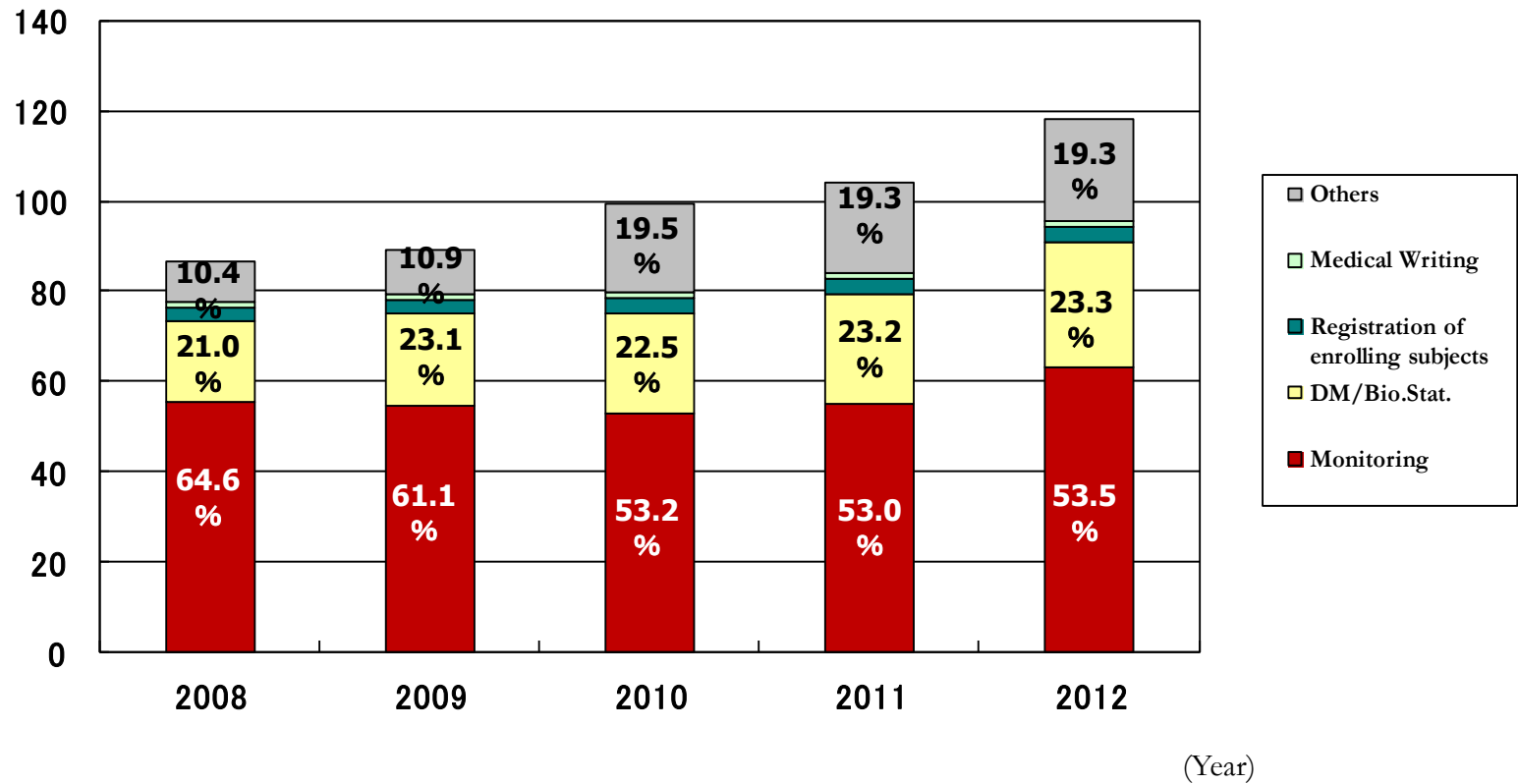
Total: 118.4 BLN¥



\*Others : Delivery and storage of Study drug, Safety Management, Randomization, BE, Translation, and etc. (In Sales Amount Order)

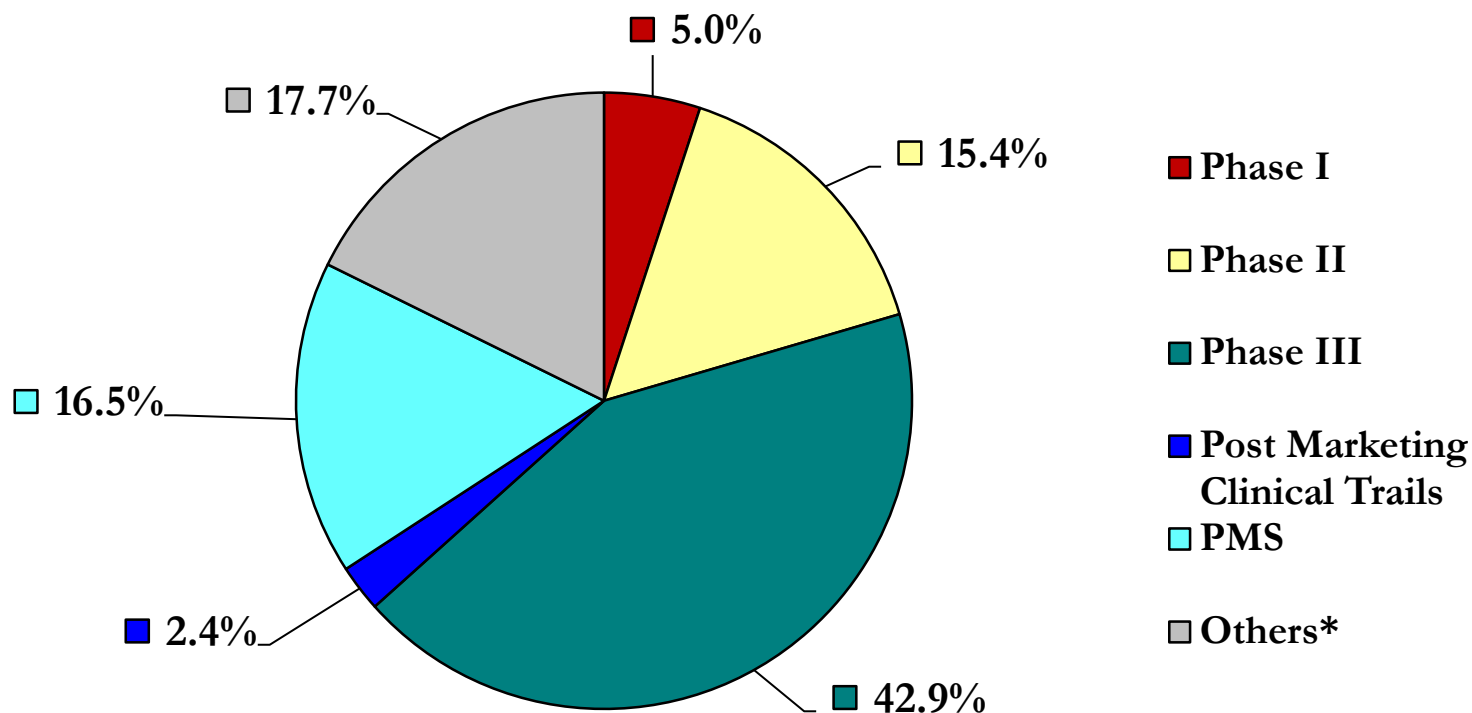
# Medical Products/Devices/Food & Nutrition-Supplement Sales by Clinical Services 2008-2012

(Sales Unit: 1 BLN¥)



# 2012 Medical Products Sales by Clinical Phases

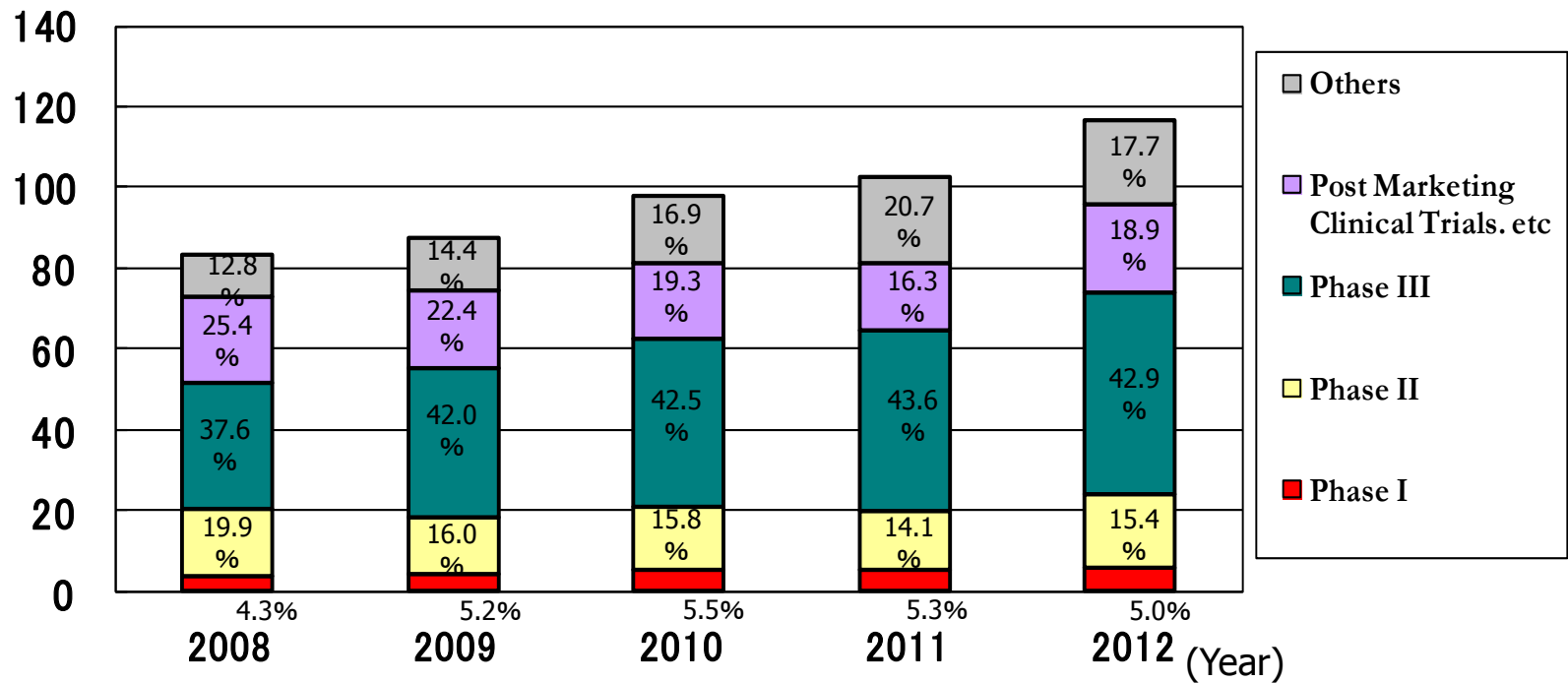
Total: 116.5 BLN ¥



\*Others: Temporary dispatching (4.7%), BE, PK, Academic clinical research, Academic scientific investigations, System development for EDC and others, and etc. (In the Number of Items Order)

# Medical Products Sales by Clinical Phases 2008-2012

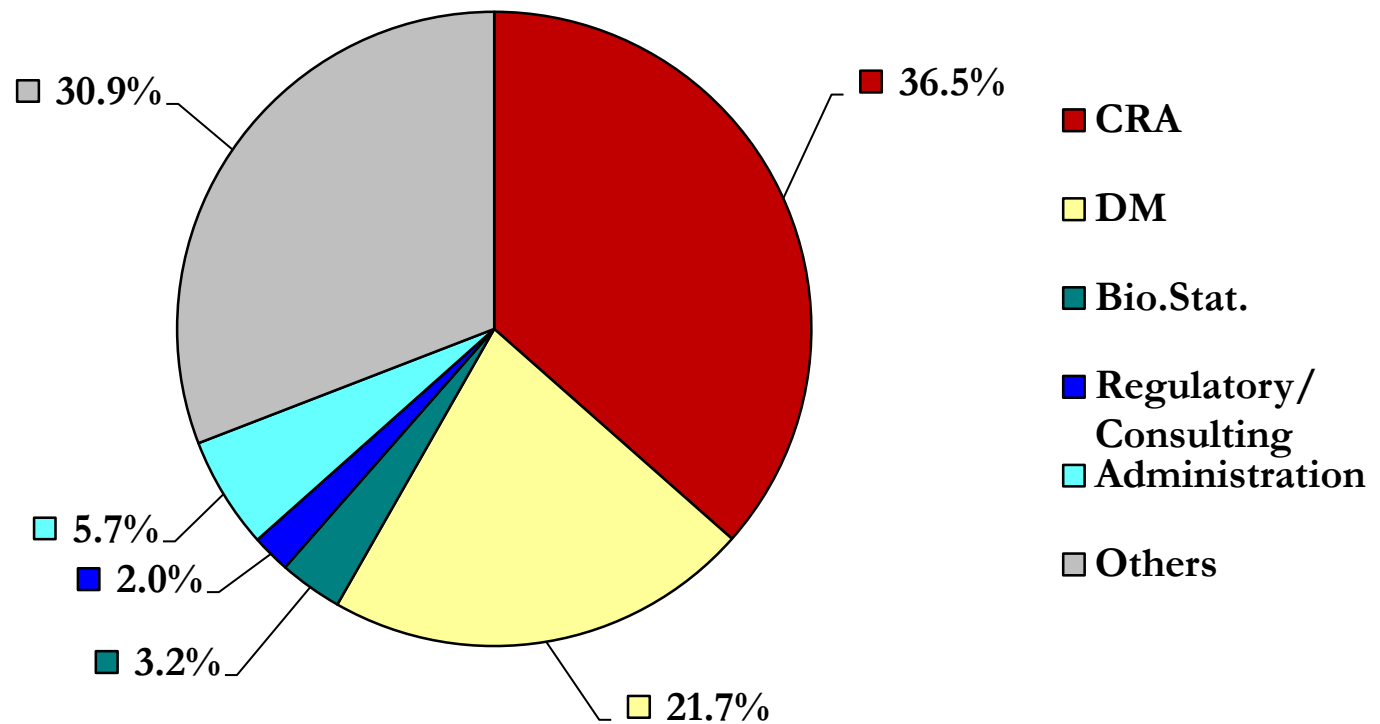
(Sales Unit: 1 BLN¥)



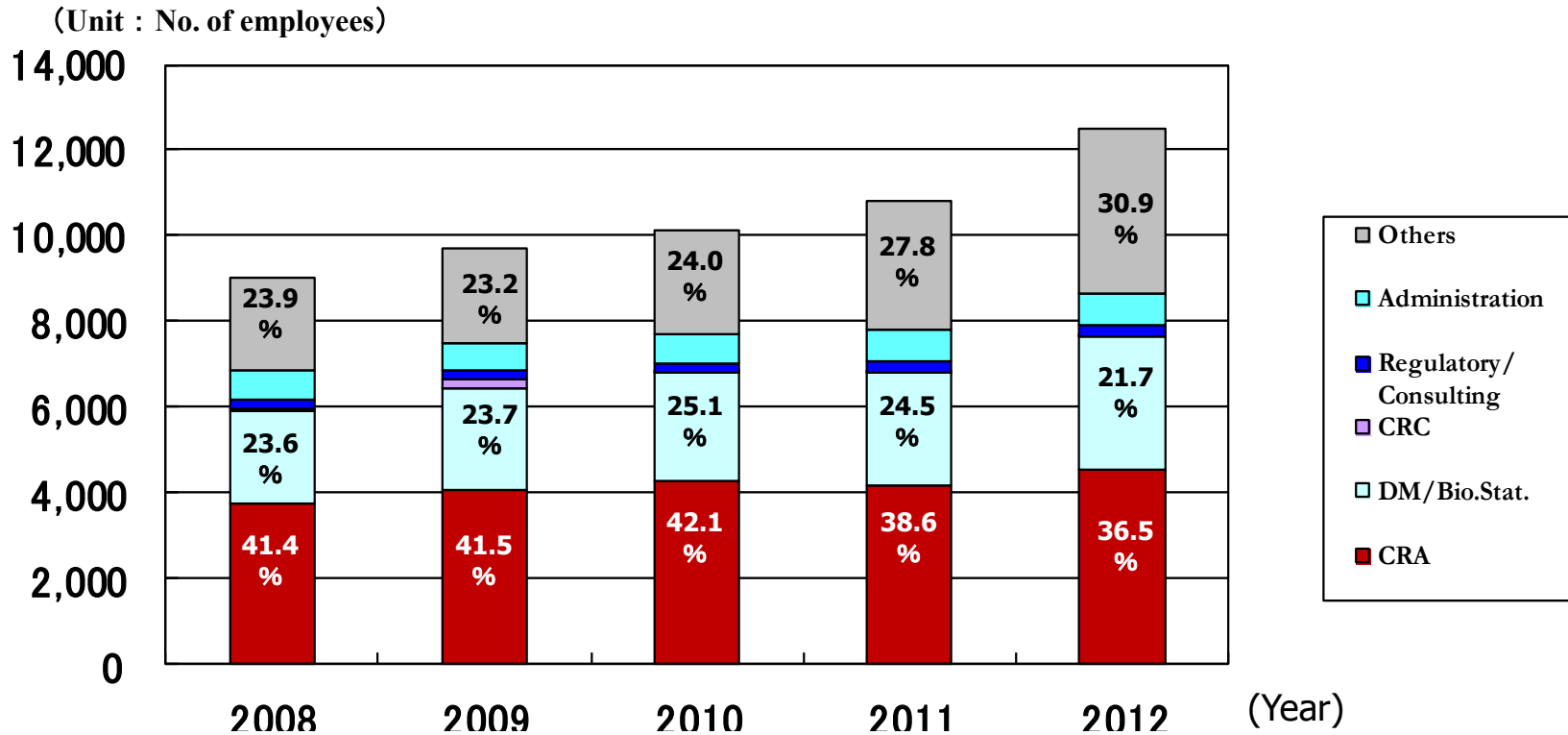


# 2012 Employees by Business Services

Total No. of employees: 12,473

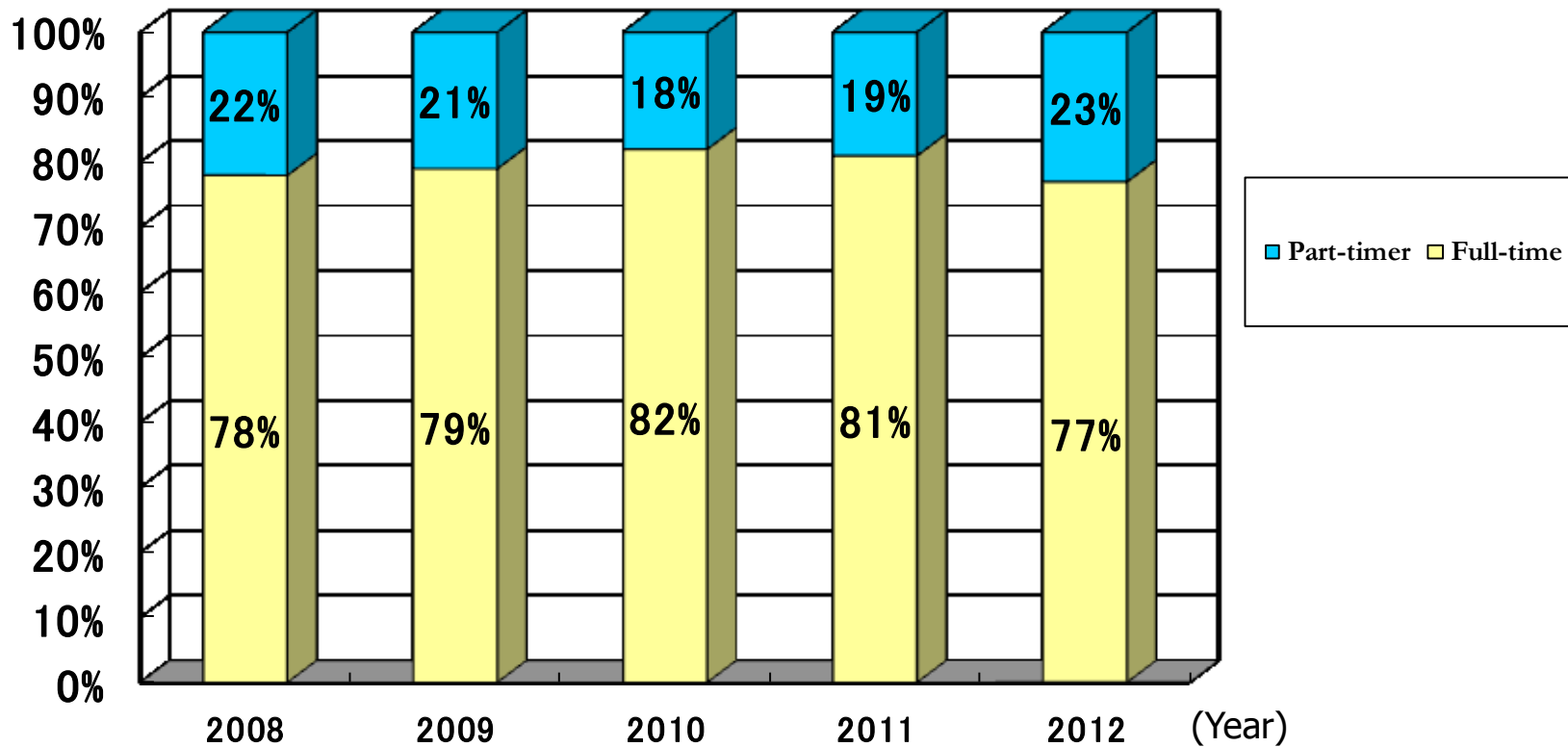


# Employees by Business Services 2008-2012



# Employment Pattern 2008-2012

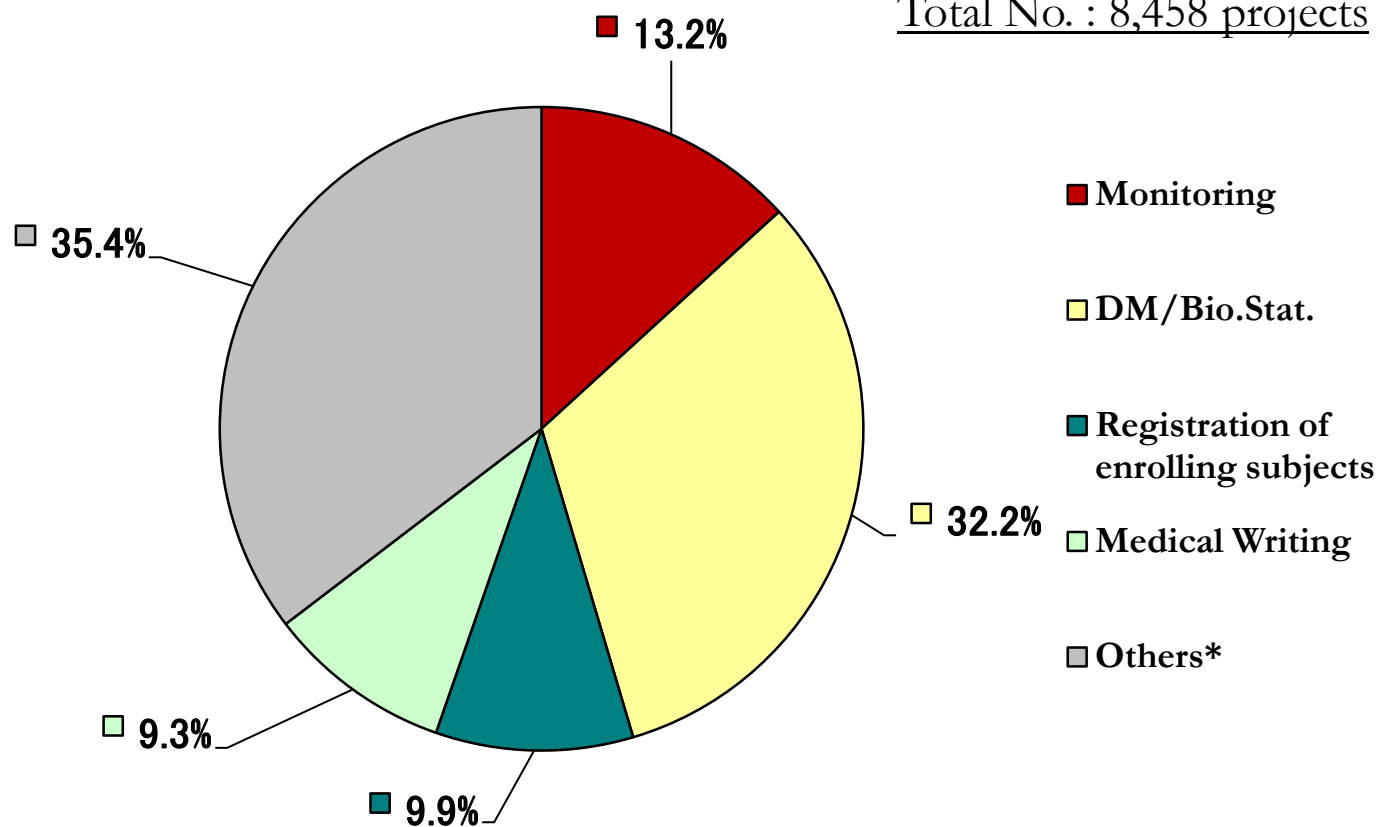
2012 Total No. of employees :12,473



## 2012 Medical Products/Devices/Food & Nutrition-Supplement Outsourced Projects by Business Services

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

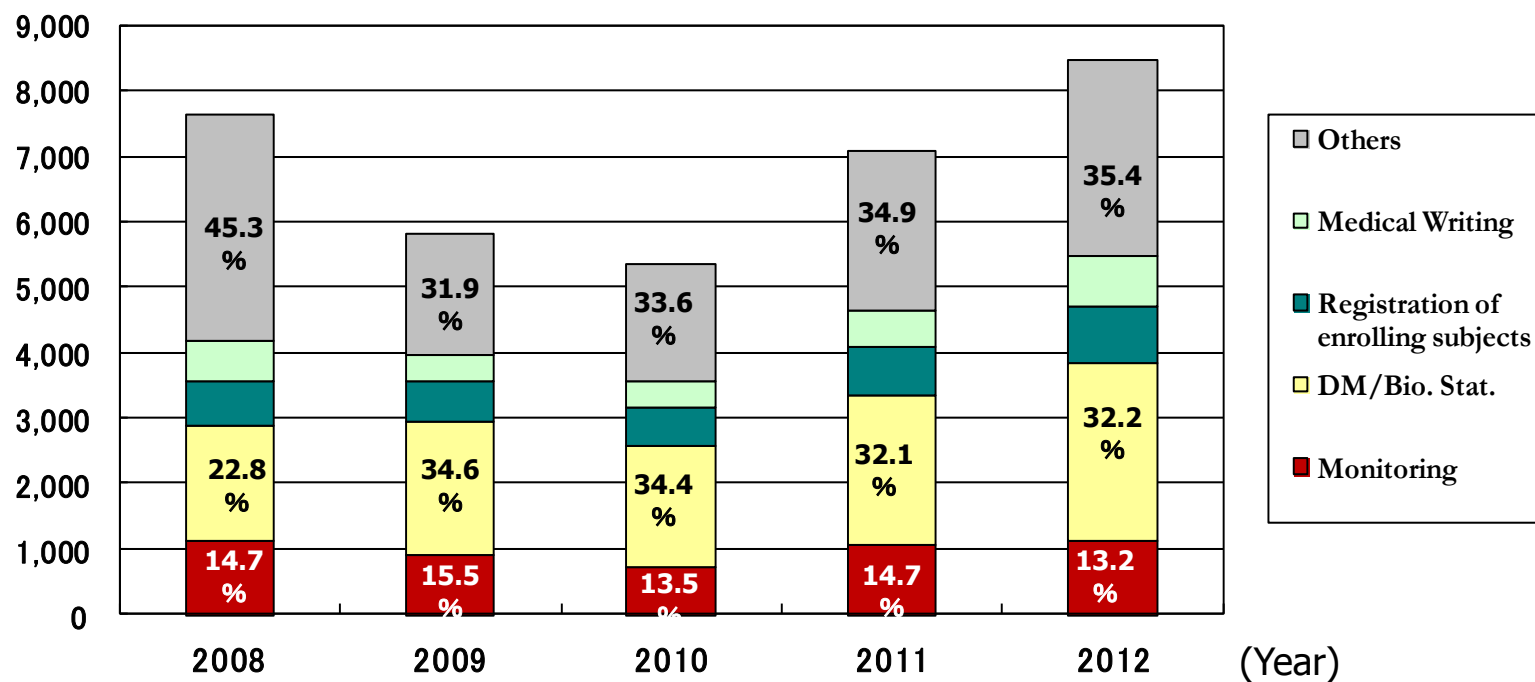
Total No. : 8,458 projects



\*Others: Delivery and storage of Study drug, Validation of an analytical procedure, Safety Management, Randomization, System development for EDC and others, and etc. (In the Number of Items Order)

# Medical Products/Devices/Food & Supplement Projects by Business Services 2008-2012

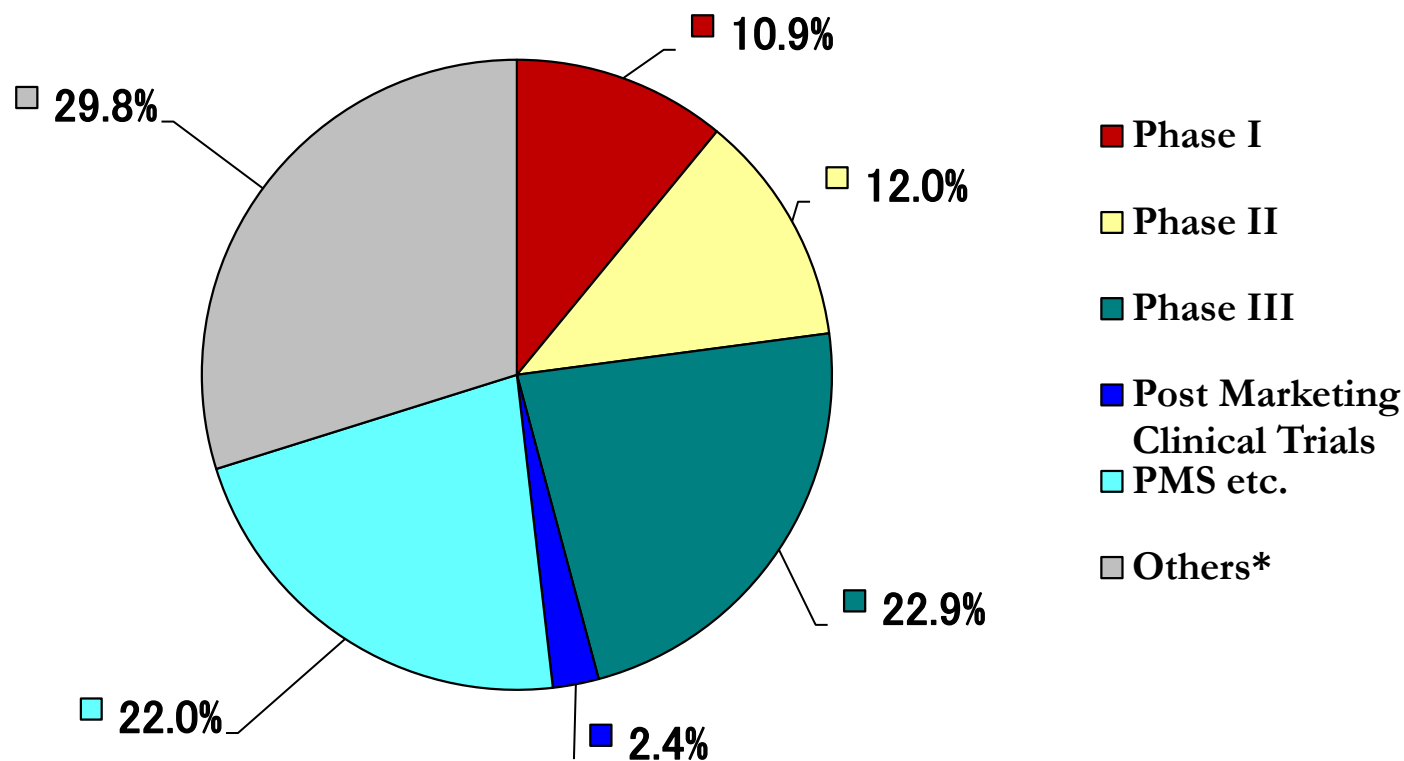
(Unit : No. of projects)



# 2012 Medical Products Projects by Clinical Phases

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

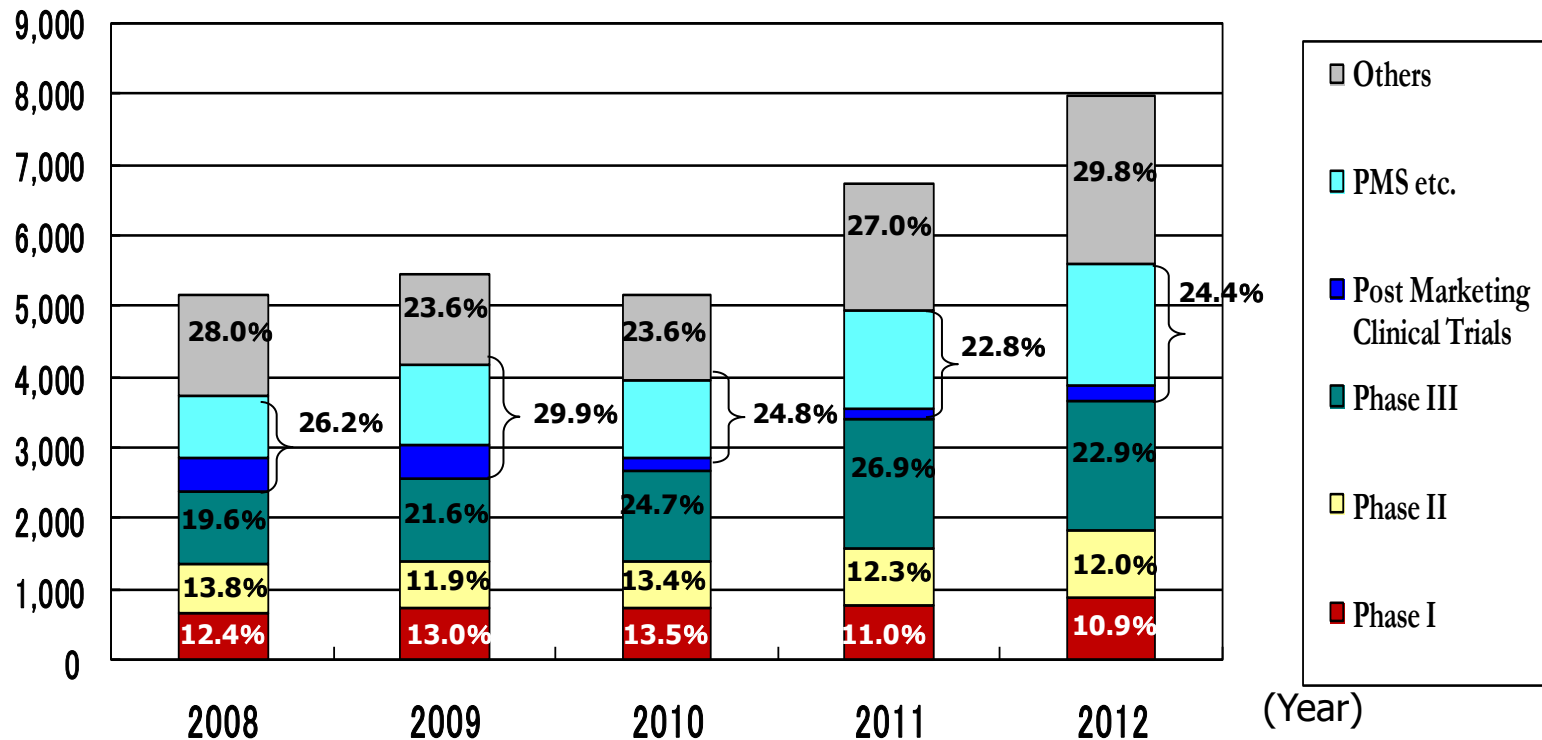
Total No. of projects:7,975



\*Others: Support Service of Application, Central laboratory, Bioequivalent studies, application of MF and generic medicines, Interior Administrative Services, 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 Clinical Phases 2008-2012

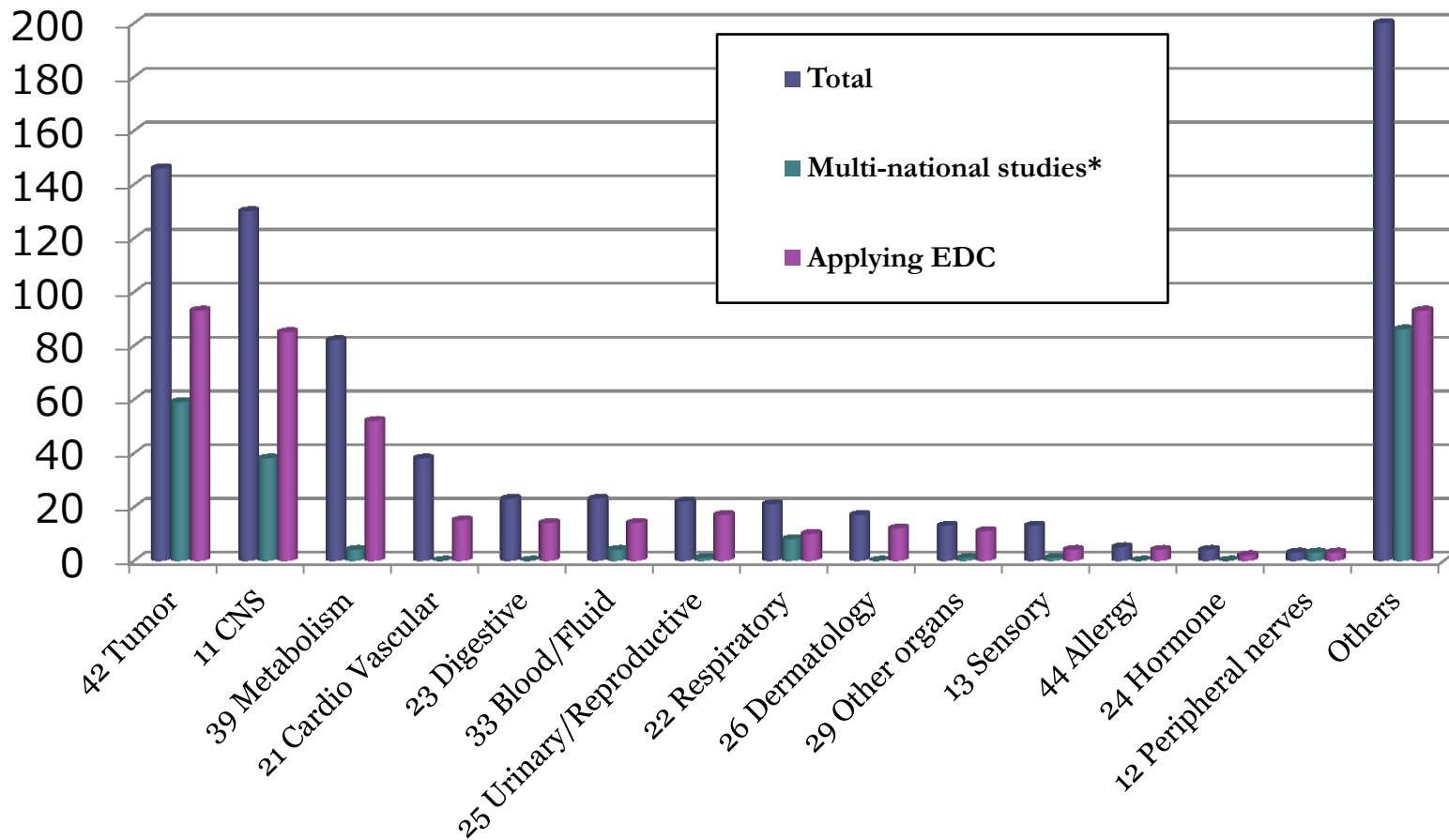
(Unit: No. of projects)



## 2012 Monitoring Projects\* by Therapeutic Area

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

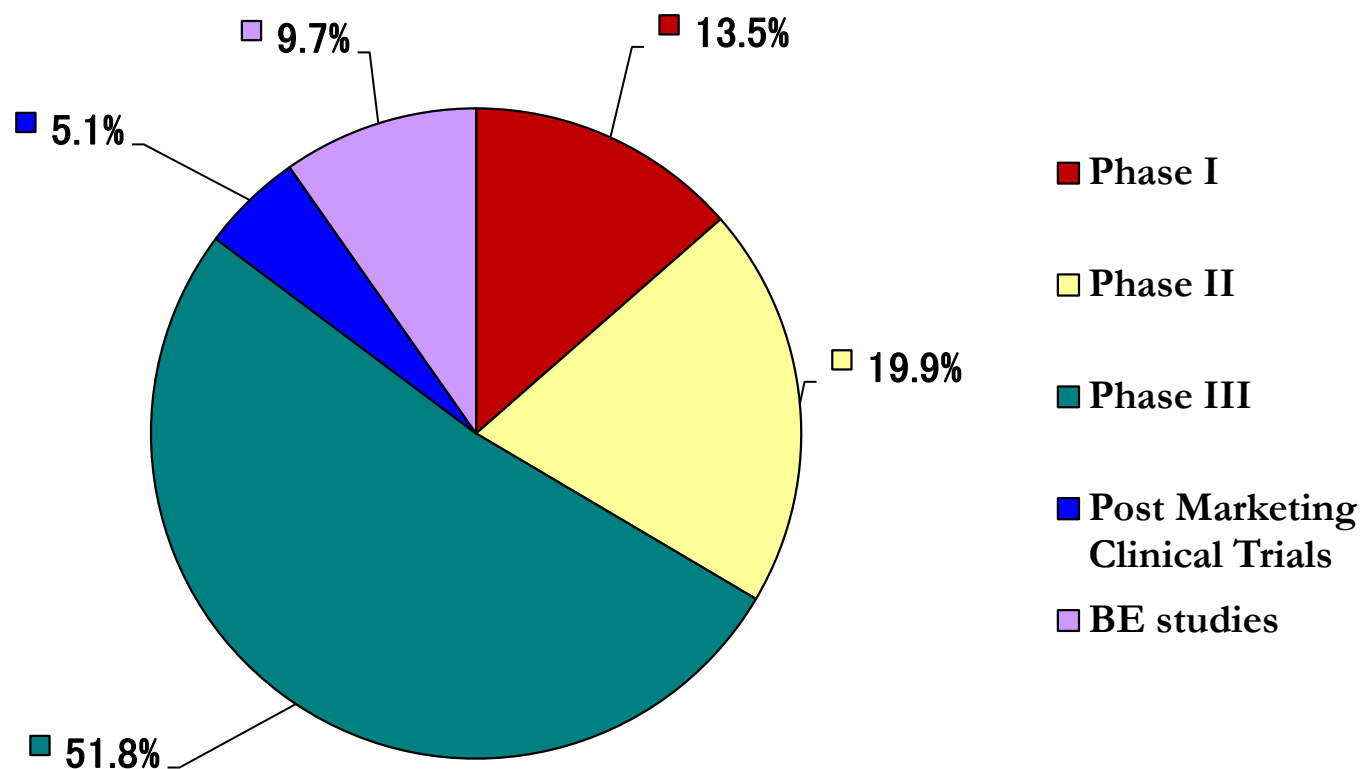
(Units: No. of projects)



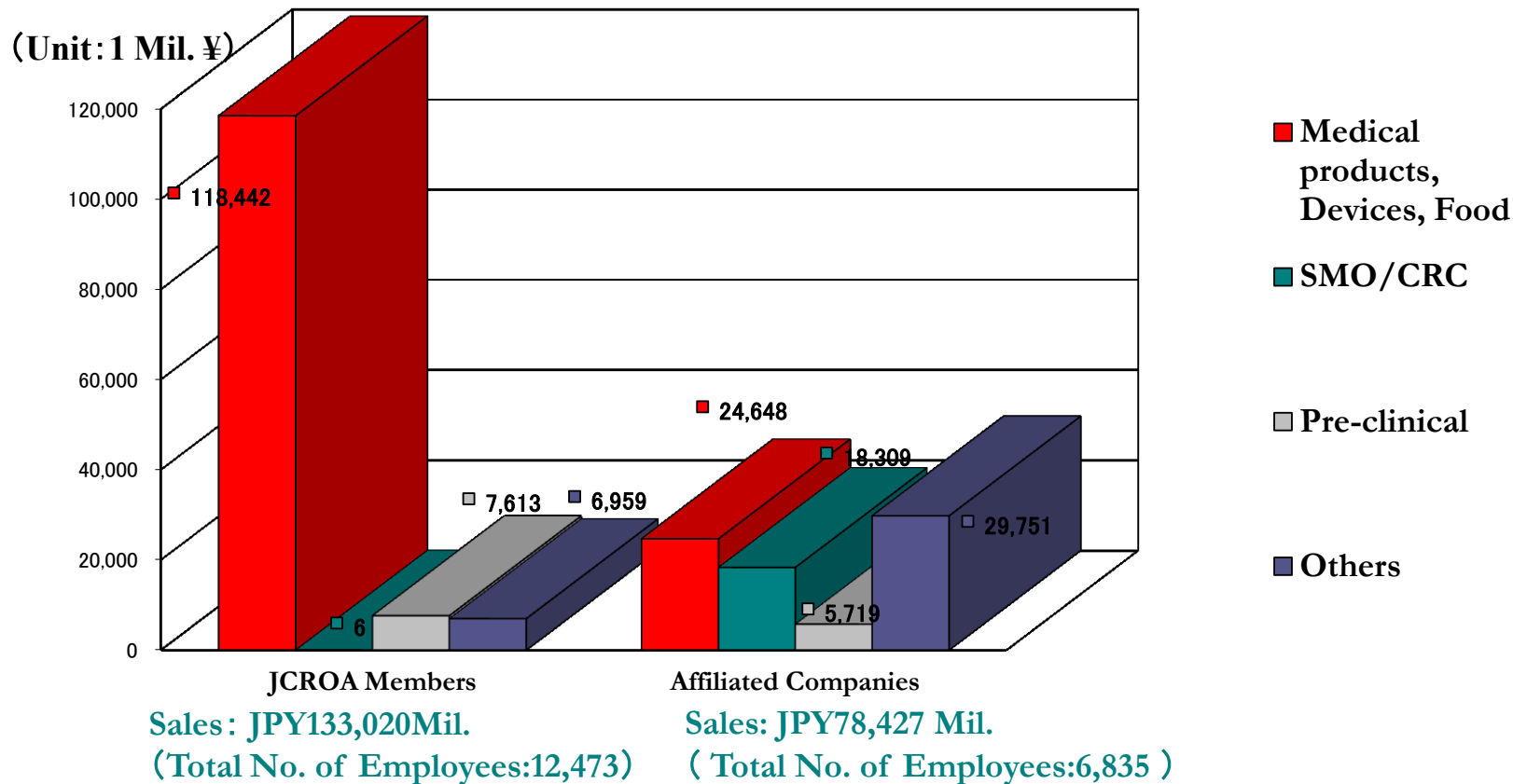


# 2012 Monitoring Projects\* by Clinical Phases

\* 811 projects as available data out of total number of monitoring projects



# 2012 Sales and Employees JCROA Members vs. Affiliated Companies\*



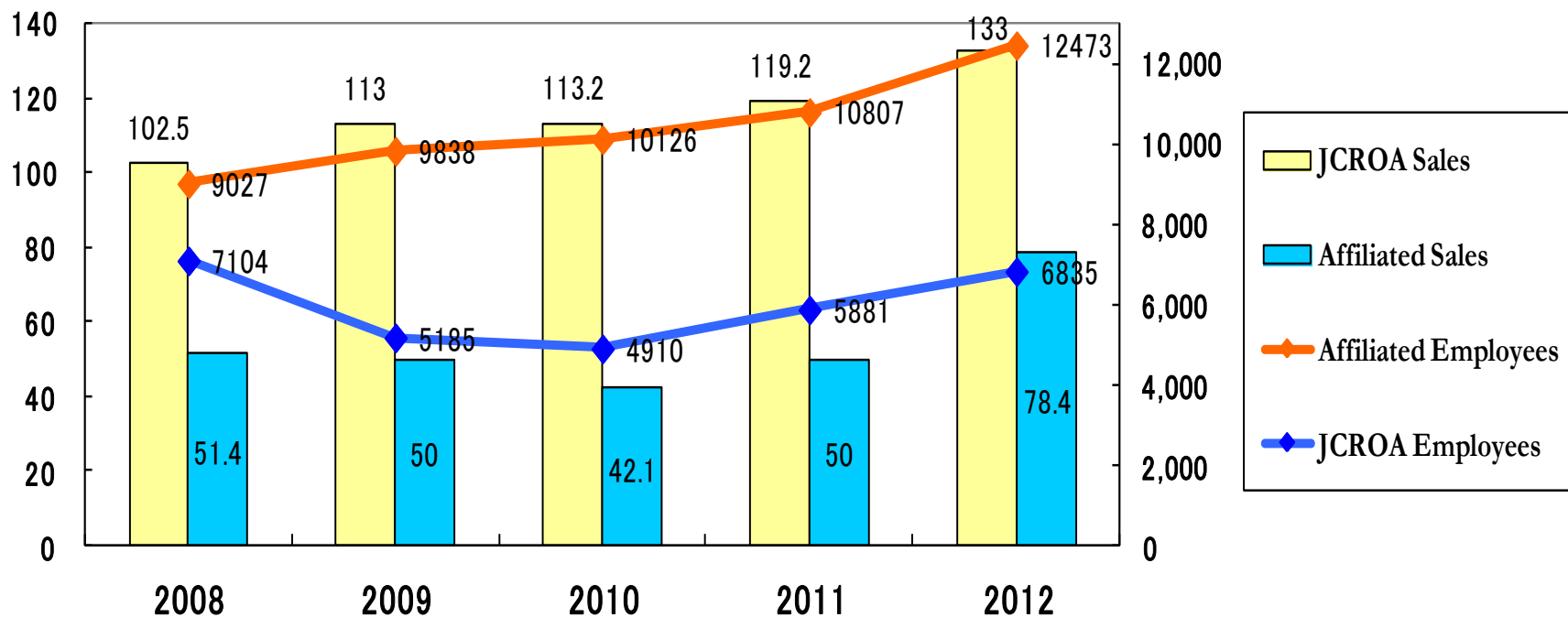
•Affiliated Companies: To have capital ties with the JCROA Members.

•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\* 2008-2012

(Unit: 1 BLN¥)

(Unit: Employees No.)



CRO/Affiliated  
Market Size

153.9  
(16,131)

163.0  
(15,023)

155.3  
(15,036)

169.1  
(16,688)

211.4  
(19,342)

1 BLN¥  
(Employees No.)