Focus on the Eye: Toward the Next Growth Phase

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Specialized Ophthalmology Company with a History of 130 Years

- Established in 1890
- Headquarters in Osaka, Japan
- Total sales $2.1 billion in FY2018*

> 60 Distribution Region
3 Plants
4,000 Employees
30% Overseas Sales

*US$1=JPY110.99
Santen’s Values

“Exploring the secrets and mechanisms of nature in order to contribute to people’s health”

Santen’s original interpretation of a passage from chapter 22 of Zhongyong (The Doctrine of the Mean) by Confucius.

We think carefully about what is essential, decide clearly what we should do, and act quickly.
Focus on the Eye: Toward the Next Growth Phase

1. Eyes are an important organ
2. Growth in our business
3. New business domains
“Vision plays a critical role in every facet and stage of life”

Source: WHO World report on vision
Globally, the Number of People with Vision Impairments is Increasing

Visually Impaired People

- Global population growth
- Aging
- Lifestyle change
- Environmental issues

2.2 billion

Source: WHO World report on vision
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US: Aiming for Growth with Differentiated Products

- Differentiated pipeline / products
- Tailored strategy for entering the US
- Realizing profitability and growth
Building on Strengths in Japan and EMEA*

- High market share and know-how
- Manufacturing, quality assurance capability

**Sustainable growth**

- Global Influencer
  - Academia and KOLs
  - Regulatory expertise
- Market presence

* Europe, the Middle East and Africa
Japan: Extension of *Eylea* Sales Contract and Launch of *Alesion LX*

*Eylea*: Co-promoted product of Bayer Yakuhin, Ltd. (MAH)

Alesion LX

**Strong business base**
China / Asia: Unlocking Potential for Further Growth

4 Billion Population × Aging Population × Improving Diagnosis and Access

Source: UN World Population Prospects 2019
Establishment of a Second Plant in Suzhou, China to Meet Demand from Increase in Patients
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Tackling Unmet Needs: Myopia

**Myopia Patients (billions)**

- **2000:** 1.4
- **2010:** 2.4x
- **2020:** 3.4
- **2030:**

High myopia: 0.5 billion in 2030

**DE-127:**
Low dose atropine

**Phase 2 trial met primary endpoint**

Source: WHO World report on vision

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Tackling Unmet Needs: Ophthalmic Rare Diseases

Inherited retinal diseases, etc. → Vision loss / blindness

Gene Therapy

Source: US National Library of Medicine National Institutes of Health
Translational Vision & Science Technology https://www.ncbi.nlm.nih.gov/pmc/articles/PMC6052953/
Partnership with ITU

To support ITU and WHO for “Be He@lthy, Be Mobile”

Raise awareness of the prevention and management of non-communicable diseases

ITU: International Telecommunication Union (a specialized agency of the United Nations)
WHO: World Health Organization
Focus on the Eye: Toward the Next Growth Phase

- Increase in ophthalmic patients
- Aim to resolve issues in the ophthalmology field
- Taking on the challenge of new fields