Ophthalmic treatment around the world

Overview of Ophthalmic Treatment around the World

The number of patients around the world who suffer visual impairment is estimated at 253 million and the number of ophthalmic patients is expected to increase as populations age. As a specialized pharmaceutical company in the field of ophthalmology, Santen will contribute to ophthalmic treatment around the world.


World Population Suffering from Visual Impairment

253 million people

- Around 253 million people around the world are estimated to suffer from visual impairment, of whom approximately 36 million are estimated to be blind.
- Visual impairment has various causes, but it is thought that over 75% of cases could be prevented if treatment were made available.
- We consider one of our missions as a pharmaceutical company to be our efforts to provide treatments to patients in places that cannot receive adequate pharmaceuticals or medical care due to issues such as poverty and less developed medical systems.

Further Information
P.22 Corporate Social Responsibility (CSR)
CSR Website

Average Annual Growth Rate of the Global Prescription Ophthalmic Pharmaceutical Market

6% (2013-2020)

- The prescription ophthalmology segment is growing at a faster rate than the overall pharmaceutical market which has an annual average growth rate of 2%.
- Due to a global population aging trend, the number of patients is expected to expand.
- 81% of people with visual impairment are aged 50 or over.

2. Source: Santen analysis
3. Source: 2018 and Beyond: Outlook and Turning Points. IQVIA, Mar. 2018
• Retinal disorders, glaucoma, and dry eye make up approximately 70% of the global ophthalmics market.
• There are different healthcare systems and levels of care around the world. Further, the ophthalmic segments are broken down differently and each region has its own treatment issues.
• Glaucoma, one of Santen’s focus areas, accounts for around 1/4 of the segment, with the number of patients projected to reach 90.6 million by 2020.4

4. Source: Market Scope, Santen analysis

- There are various ophthalmic disorders, and Santen provides products to meet a wide range of needs as a specialized pharmaceutical company in the field of ophthalmology.
- Different prescription ophthalmic pharmaceuticals are sold in each country and region. Santen has a particularly broad lineup in Japan with products numbering about 70.

Further Information
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Santen’s Initiatives to Meet Different Needs in Each Region and Country

With different prescription ophthalmology segment disorders, healthcare systems and levels of care around the world, the various markets differ from one another in terms of therapeutic needs. Santen responds carefully to the specific conditions in each region to contribute to ophthalmic patients globally.

Italy

Italy has a high level of healthcare and represents a large market that is among the top 10 in the world and the top 5 in Europe in terms of value. Retinal disorders and glaucoma represent the largest segments, while dry eye is markedly smaller with no dry eye treatments provided insurance reimbursement. Santen has made inroads, starting with the launch of ophthalmic products acquired from U.S.-based Merck & Co., Inc. in May 2014, and is marketing several products centered on glaucoma treatment. With sharp growth in sales, the Santen’s market share has increased to 6%.

China

In China, the most populated country in the world, ocular infections and dry eye are the largest segments. Santen’s core products in China are Cravit for ocular infections and Hyalein for dry eye. In China, hospitals and clinics are classified by infrastructure, function and role they provide. Santen supplies products mainly to those with the highest grade of 3 as well as grade 2 facilities. In 2016, we established a joint venture in Chongqing with the goal of supplying prescription ophthalmic pharmaceuticals that fulfill standards for high quality at an appropriate price to even more patients, including at community-based grade 1 facilities. Currently, we are constructing a plant capable of manufacturing products to the Santen’s high quality standards.

Message

Great expectations for Santen to meet the eye health needs of people worldwide

Vision is our most precious sense. Age-related diseases of the eye are increasing exponentially around the world and, given a normal lifespan, will affect every person. The huge increase in people aged over 60 worldwide will present a huge challenge to healthcare services and our future quality of life. The demand for better, more efficient treatments will be the greatest issue facing ophthalmic healthcare in the next few decades. We hope that Santen continues to deliver and develop leading treatments in ophthalmology. This includes treatments for diseases which increase with age, like glaucoma, macular degeneration and ocular surface disease, and also those for disorders that are becoming increasingly common, like myopia. We are pleased that as a specialized company in ophthalmology, Santen is continuing to be very courageous and innovative in new areas, including novel devices which have the potential to change and improve the lives of people around the world.
Korea has a very similar ophthalmic treatment environment to Japan in terms of population aging and healthcare development. Santen is the unrivaled leader in glaucoma with a share of approximately 40% and has provided products to meet various patient needs. In the dry eye field, Santen has contributed to treatments for many people by developing and launching products to meet local needs. In fiscal 2017, we achieved a 24% year-on-year increase in sales and grew to become the top ranking1 company for market share and customer satisfaction among Korea’s prescription ophthalmic providers.

Among prescription ophthalmic pharmaceuticals, glaucoma treatments are the largest segment. Glaucoma is the leading cause2 of vision loss in Japan, and one of the main issues in treatment is the large number of patients who stop their treatment because their symptoms are not recognized. In 2017, the Company started supplying packages to promote higher treatment continuation rates by providing patients and their families with the necessary information that is helping promote treatment continuation. These were found to have a significant impact at institutions where trials took place. Looking ahead, we will provide solutions that meet the needs of patients and ophthalmology overall, including for prevention, diagnosis, treatment and follow-up. The company has a 46% share of this prescription ophthalmic pharmaceutical market.

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1. Santen calculations based on external data

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Message

Finding the path of innovation in a bright journey for patients

Yao Ke, M.D.
President of the Chinese Ophthalmological Society,
Professor and Chief of the Eye Institute of Zhejiang University and Eye Center of the Second Affiliated Hospital of Zhejiang University School of Medicine

Experiencing both rapid economic development and population aging, China is also a country with one of the most serious issues relating to blindness and visual impairment. Ophthalmologists have worked tremendously hard over the past decades to improve this situation. Gratifyingly, the development of ophthalmology in China has reached leading levels globally in many respects, including the production of cutting-edge research and academic publications, as well as an increased number of patients receiving treatment. Undoubtedly, these remarkable achievements are supported by many pharmaceutical companies including Santen in particular. Santen products offer excellent performance in many aspects. Although the incidence of infection has decreased in recent years, we still face huge challenges particularly in impoverished and remote areas, but increasingly wide use of Cravit and Tarivid is alleviating this issue. Meanwhile, Tapros effectively reduces intraocular pressure in glaucoma patients. And, the symptoms of patients with dry eye are greatly eased after the use of Hyalein. To some degree, the contributions of these outstanding pharmaceutical companies speed up the progress of ophthalmology in China. Going forward, I expect Santen to further strengthen its commitment to contributing to ophthalmology in China, and we are all looking forward to building a prosperous blueprint for the future of ophthalmology together with Santen.

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