

## 官民協議会

# 医薬品産業の成長に向けて

—国民の健康を守るための国家戦略—

2025年6月26日  
日本製薬工業協会  
会長 宮柱 明日香

# 官民協議会に求めること

**日本の成長を担う基幹産業である医薬品産業を、国民の健康と経済の両面に資する重要な国家戦略として位置づけ**、国内産業としての更なる活力強化および国際的な展開の促進に向けて、長期的な戦略プランの策定を目指すにあたり、以下2点を中心に議論を継続頂きたい

## 1. 革新的新薬の研究開発・製造への継続的な投資

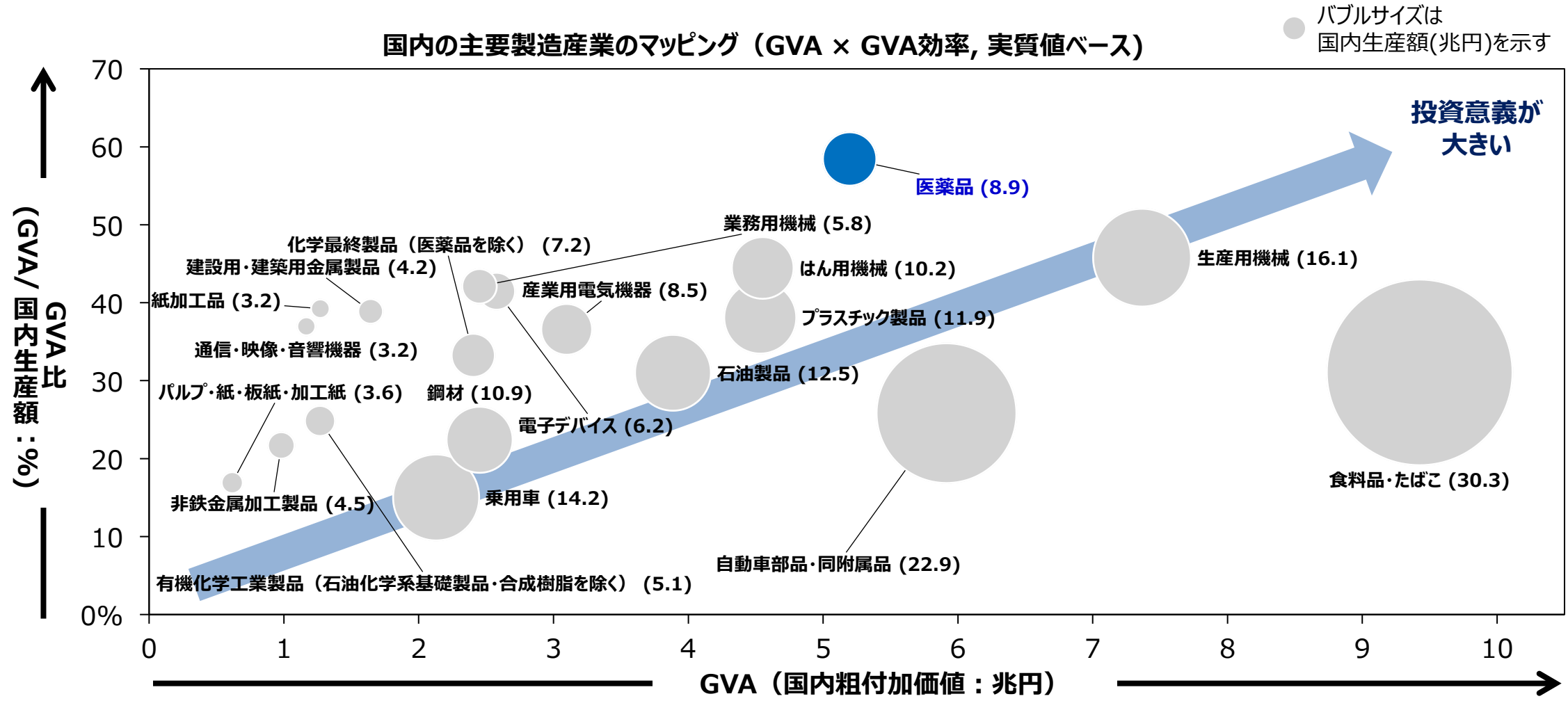
- 投資対象・期間について産官学横断的に十分な議論を踏まえて決定し、決定した投資方針は責任をもって長期的にフォローし、安定的な支援を継続する
- 省庁横断的な、統合的かつ実効性のある政策対応を推進する

## 2. 社会保障財政、薬価制度設計に関する議論

- 「社会保障費の経済・物価動向等を踏まえた予算の対応」の具体化に向けて、薬価への反映方法について議論を進める
- イノベーションを適切に評価し予見性を高める新たな薬価制度のあり方について、具体的な検討を進める

# 医薬品産業は日本の成長を担う基幹産業

## 医薬品は国内生産額に占めるGVA（粗付加価値）額が高く、投資意義が大きい



出所: 経済産業省 令和2年延長産業連関表 (平成27年基準、実質値ベース) ※統合中分類96部門の内、製造業は38種 (総GVA508兆円の内、製造業GVAは74兆円 (15%))。その内、国内生産額が3兆円以下の産業を除いた、19種の産業をグラフ化

# 医薬品産業への国主導の戦略的投資・政策を求める ～半導体産業から学ぶ～

医薬品産業は、国家安全保障の観点からも重要な成長産業であり、今、重要な局面を迎えている



## 産業の潮流変化

- 低分子から高分子、バイオ、遺伝子治療薬など、新規モダリティ等の革新的医薬品へ移行
- 革新的医薬品の実用化から市場導入までに必要な人材、科学的知見・技術、評価基準、及び規制等の整備が不足

新技術に対応するための投資



## 開発・製造体制の構造転換

- 医薬品産業は公衆衛生の基盤だが輸入依存が高く、経済安全保障リスクやサプライチェーン断絶により、有事には製造・安定供給が脅かされる懸念
- 水平分業型へ移行が進んでいるが、アカデミア、スタートアップ、CDMOなどとのパートナーシップが十分な成果に繋がらない

国民の健康を守る国内基盤の強化



## グローバル競争の激化

- 研究開発には長期かつ多額の投資が必要であり、製品のグローバル展開が不可欠
- 予見性に欠ける薬価制度により日本市場への開発・投資が減少
- その結果、日本の製薬企業は国際的プレゼンス低下(創薬力、世界シェア)

日本市場の魅力を向上させる政策

医薬品

半導体

- 技術革新への対応の遅れ

- 自社完結型構造から脱却できず

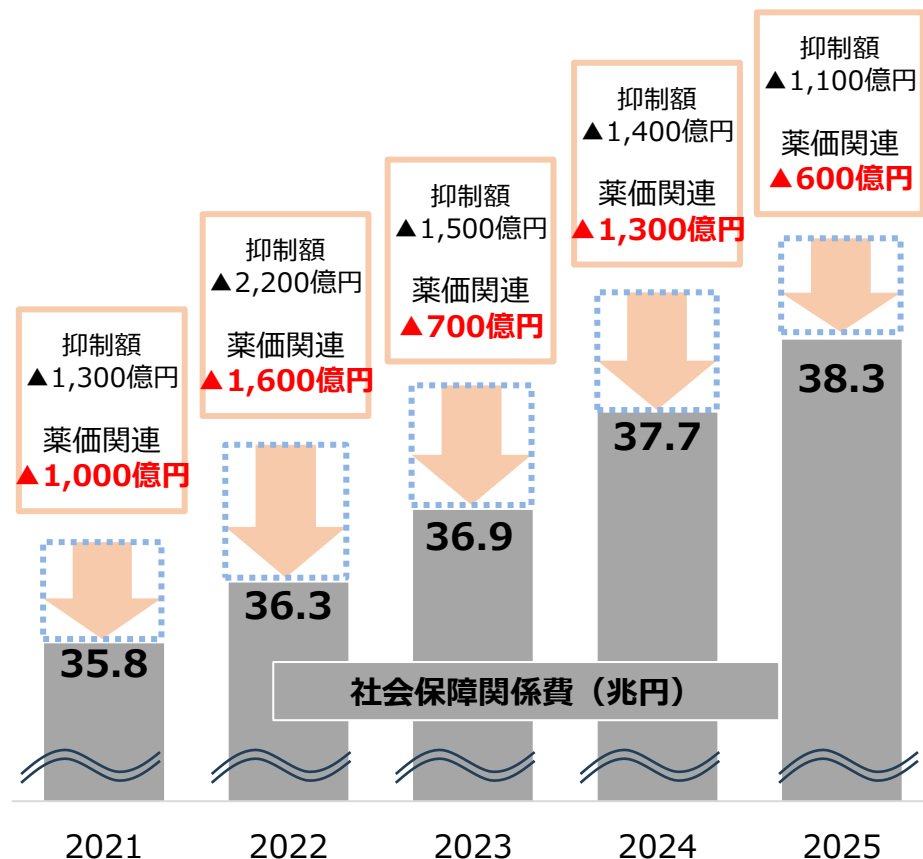
- 日本企業の競争力低下

# 日本の医薬品産業への投資・開発を呼び込むために

## 「予見性のある薬価制度」の構築により国内医薬品市場の成長を促進

### 社会保障関係費の削減額

社会保障削減額のうち70%以上が薬価によるもの<sup>1</sup>



### 取り組むべき課題

#### ① 社会保障関係費の枠組み拡大

- 国内医薬品市場の2015～2024年で成長率は僅か0.4%<sup>2</sup>
- 高齢化による増加分に相当する伸びにこうした経済・物価動向等を踏まえた対応に相当する増加分を加算する

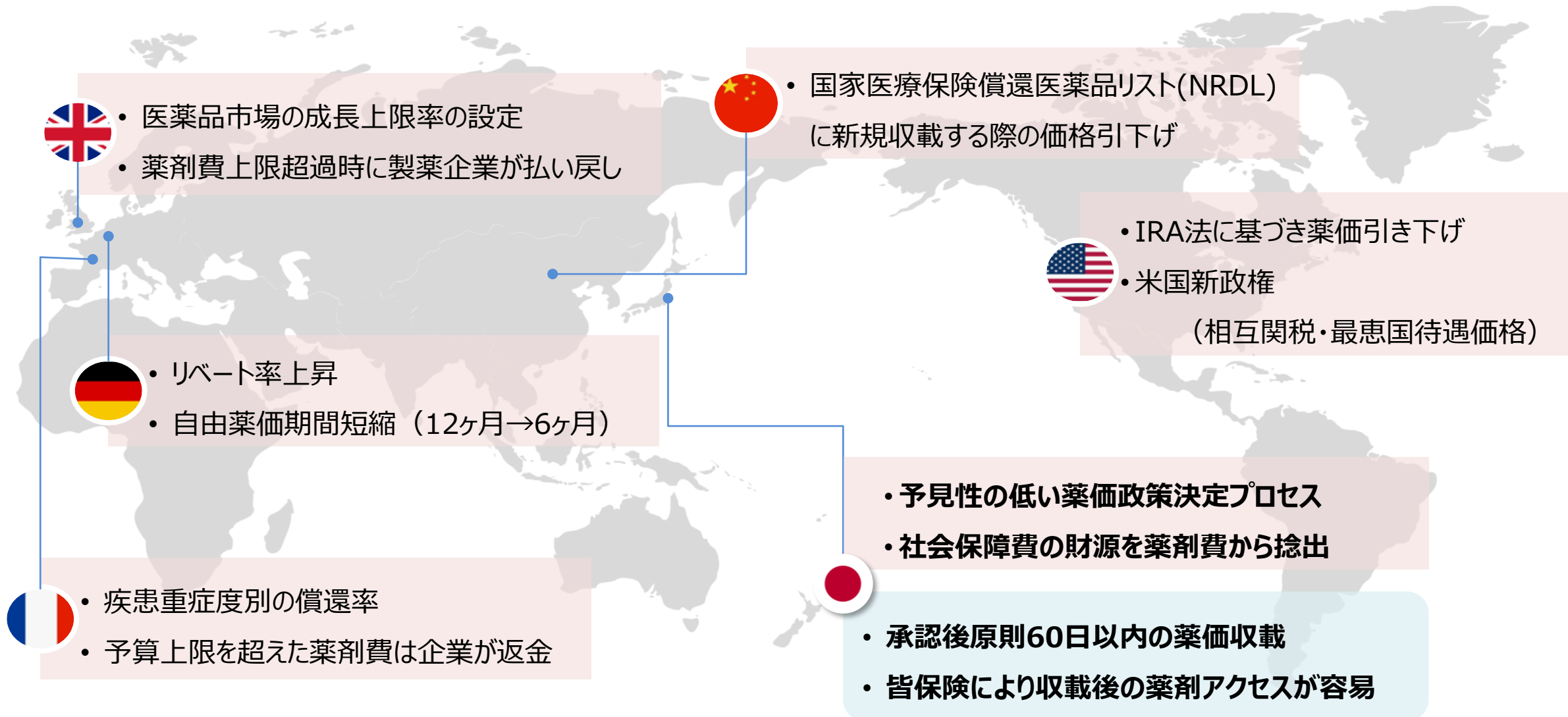
(「骨太の方針2025」より引用)

#### ② 予見性の高い薬価制度改革

- 革新的新薬の適切な価値評価
  - 新規モダリティ等の革新性を評価できる新たな仕組み検討
  - 柔軟な類似薬の選定
- 革新的新薬の特許期間中の薬価維持
  - カテゴリー別の薬価改定
  - 市場拡大再算定の廃止
  - 費用対効果評価の抜本的なあり方検討

# 日本の医薬品産業の競争力向上に今こそ取り組むべき

各国で医薬品市場環境の厳しさが増す中、日本には投資を呼び込める機会がある





協薬製



**Public-Private Council**

# **Japan's Pharmaceutical Growth Strategy**

**-A National Imperative for Health Security-**

**June 26, 2025**

**Asuka Miyabashira**

**President, Japan Pharmaceutical Manufacturers Association**



# What We Ask of the Public-Private Council

In positioning the pharmaceutical industry—one of Japan’s key growth sectors—as a vital component of national **strategy** that contributes to both public health and economic prosperity, we respectfully request that the Council continue discussions with a focus on the following two key areas, with the aim of formulating a long-term strategic plan to further invigorate the domestic industry and promote its global expansion:

## 1. Sustained investment in R&D and manufacturing of innovative new drugs

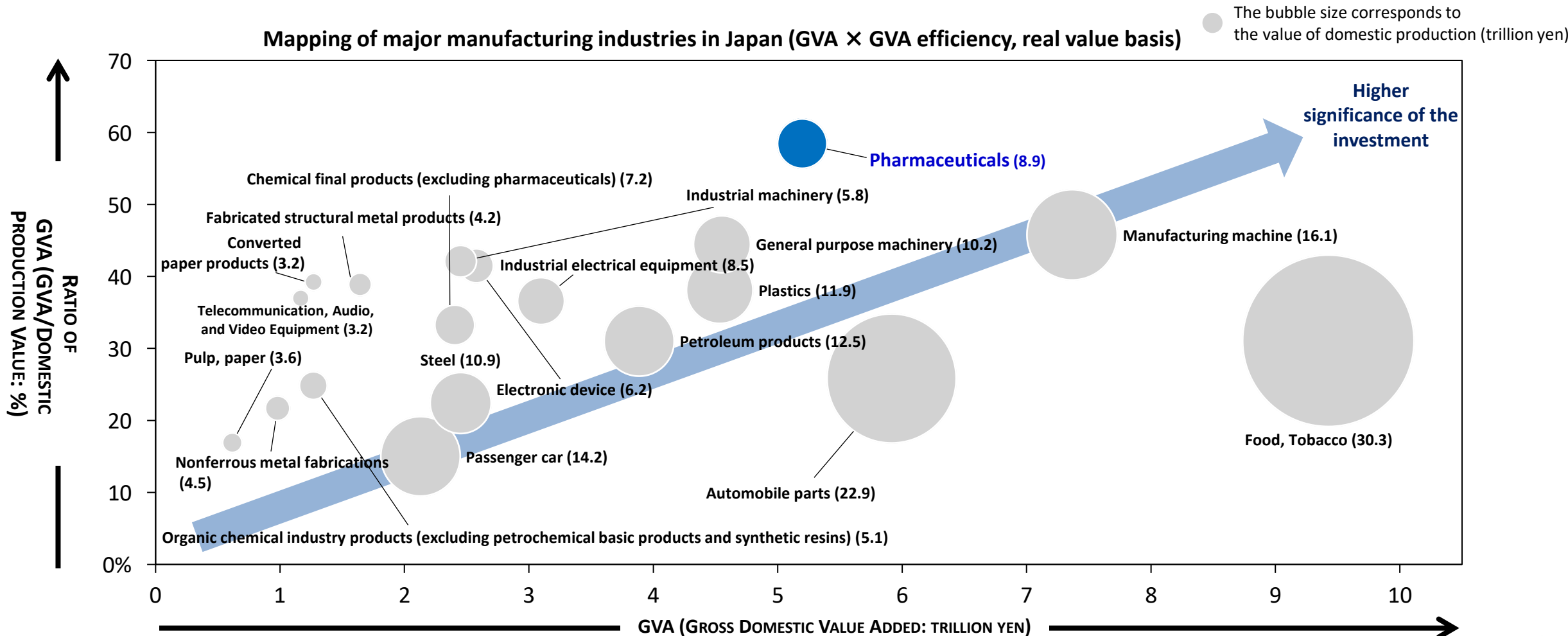
- ❑ Investment targets and timeframes should be determined through cross-sectoral discussions among government, industry, and academia. Once established, the investment policy must be followed through with long-term commitment and stable support.
- ❑ A coordinated, cross-ministerial approach is essential to ensure integrated and effective policy implementation.

## 2. Discussions on Social Security Financing and Drug Pricing System Design

- ❑ In order to materialize the concept of “budgeting that reflects economic and price trends in social security expenditures,” we urge continued dialogue on how such considerations should be reflected in drug pricing.
- ❑ We also call for concrete deliberation on a new drug pricing system that appropriately values innovation and enhances predictability.

# The pharmaceutical industry plays a key role in Japan's growth

Pharmaceuticals have a high GVA in domestic production, underscoring its importance as an investment target



Source: Extended input-output table, METI 2020 (based on 2015 benchmark, , real-term values) Among the 96 sectors in the integrated classification, 38 are classified as manufacturing. (Of Japan's total GVA of 508 trillion yen, the manufacturing accounts for 74 trillion yen (15%)). This chart visualizes 19 manufacturing industries, excluding those with domestic production values below 3 trillion yen.

# Strategic Investment in Pharma: A Government-Led Approach Inspired by Semiconductors

Central to public health and national resilience, the pharmaceutical sector now demands bold, strategic action



## Shifting technology landscape

- Japan's pharmaceutical sector is **shifting from small molecules to advanced modalities such as biologics and gene therapies**.
- Key enablers -talent, science, standards, and regulation- **remain underdeveloped** for the successful market entry of innovative therapies

## Investing in innovation



## Structural change in development/manufacturing

- While the pharmaceutical industry serves as the foundation of public health, Japan remains **highly dependent on imports, posing significant risks to economic security and supply chain resilience, especially in times of crisis**
- Despite a shift toward horizontal specialization, **partnerships among academia, startups, and CDMOs have yet to yield sufficient results**

## Strengthening domestic infrastructure for public health



## Intensifying global competition

- **Long-term and substantial R&D investment is essential**. Global product expansion is critical.
- **Unpredictable drug pricing system discourages development and investment in the Japanese market**
- As a result, Japanese pharmaceutical companies are **losing international presence** — in innovation and global market share.

## Enhancing Japan's market attractiveness through policy

## Pharmaceuticals

## Semiconductors

- Lagging adaptation to technological change

- Slow transition from vertically integrated models

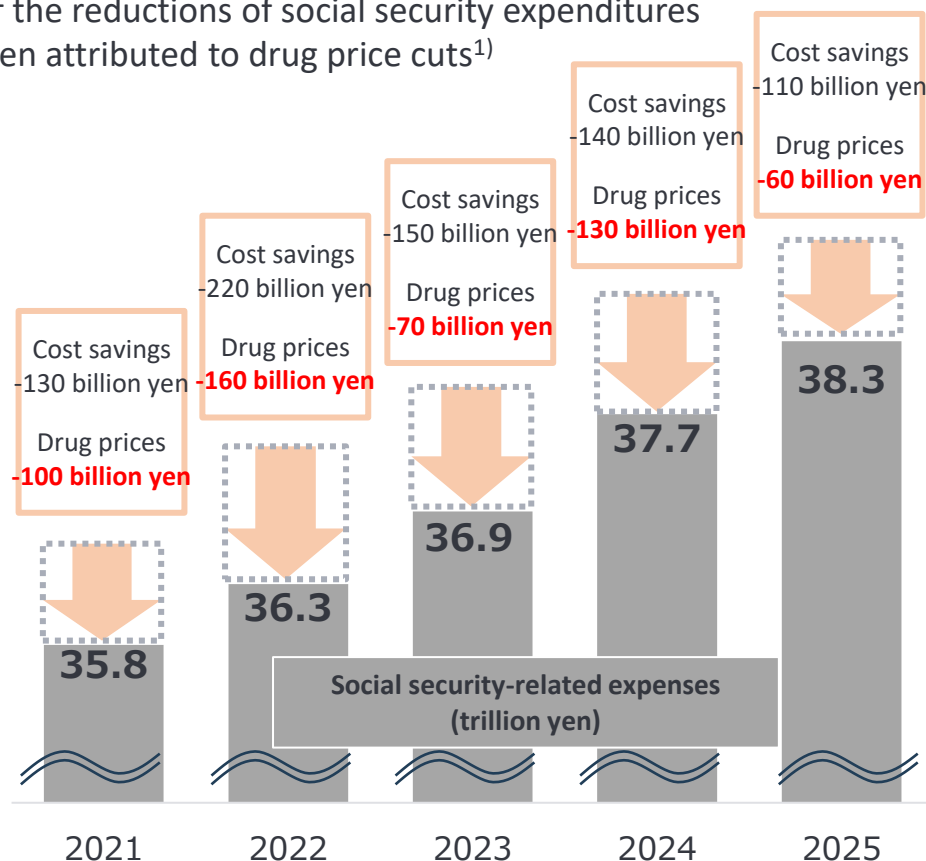
- Declining global competitiveness of Japanese companies

# Attracting Investment and Innovation to Japan's Pharma Sector

Establishing a drug pricing system with long-term predictability to accelerate the market growth

## Social security cost savings

70% of the reductions of social security expenditures has been attributed to drug price cuts<sup>1)</sup>



Source : 1) Ministry of Finance, the Cabinet Office

2) Copyright ©IQVIA. Calculation based on JPM (Unauthorized reproduction prohibited)

## Policy Priorities

### 1. Expand the framework for social security expenditures

- ❑ The growth rate of Japan market from 2015 to 2024 was **only 0.4%**<sup>2)</sup>
- ❑ In addition to the natural increase associated with population aging, an additional adjustment should be made to reflect economic and price trends.

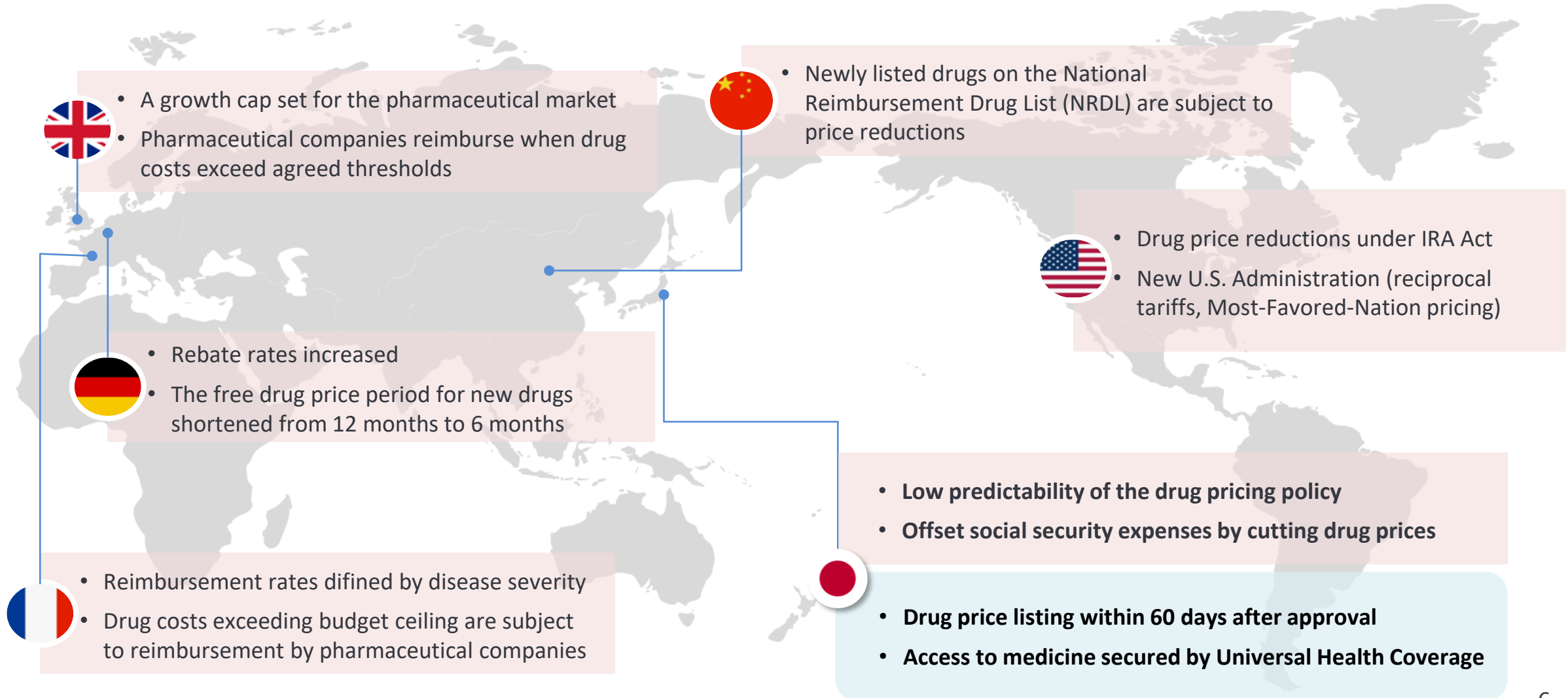
(Honebuto policy 2025)

### 2. Reform the drug pricing system with predictability

- ❑ Appropriate value assessment of innovative drugs
  - New framework to evaluate innovation in emerging modalities
  - Flexible selection of comparator drugs
- ❑ Price maintenance during patent period for innovative drugs
  - Category-based drug price revisions
  - Abolition of market expansion repricing
  - Fundamental review of cost-effectiveness evaluation

# Now Is the Time to Strengthen Japan's Pharmaceutical Competitiveness

While global pharma market environment gets tougher, Japan has an opportunity to attract investment





製藥協