 ロシュ グループ

創薬力向上のための官民協議会

日本で^{つく}創って、^{つく}製って、
日本と世界の患者さんに届ける

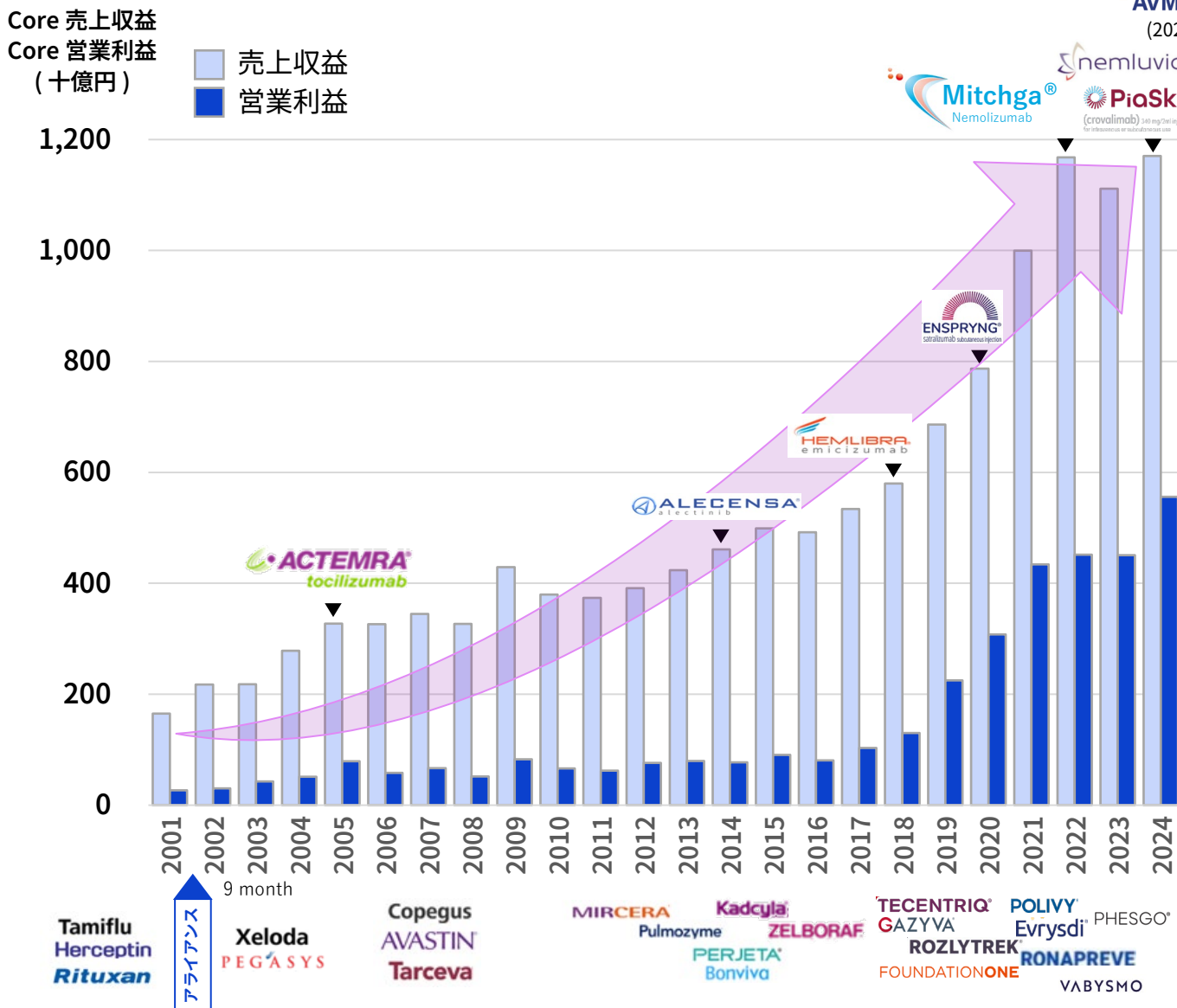
2025年6月26日

中外製薬株式会社

代表取締役社長CEO

奥田 修

中外製薬 - 革新的自社創製品を日本から世界へ届け、飛躍的に成長



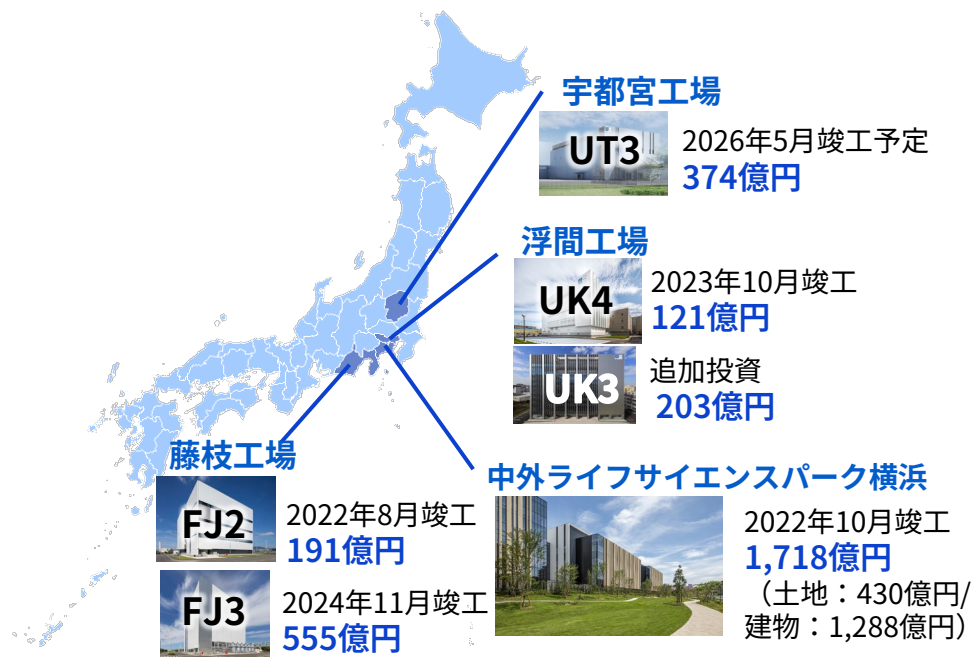
■ ロシュ社との戦略的アライアンス後、 7つのグローバル製品を創製

■ Core営業利益：21倍、売上収益：7倍

(2001年～2024年)

■ 時価総額：11兆7,517億円^{*2} (国内製薬業界 No.1)

■ 国内研究所・工場へ積極的に設備投資

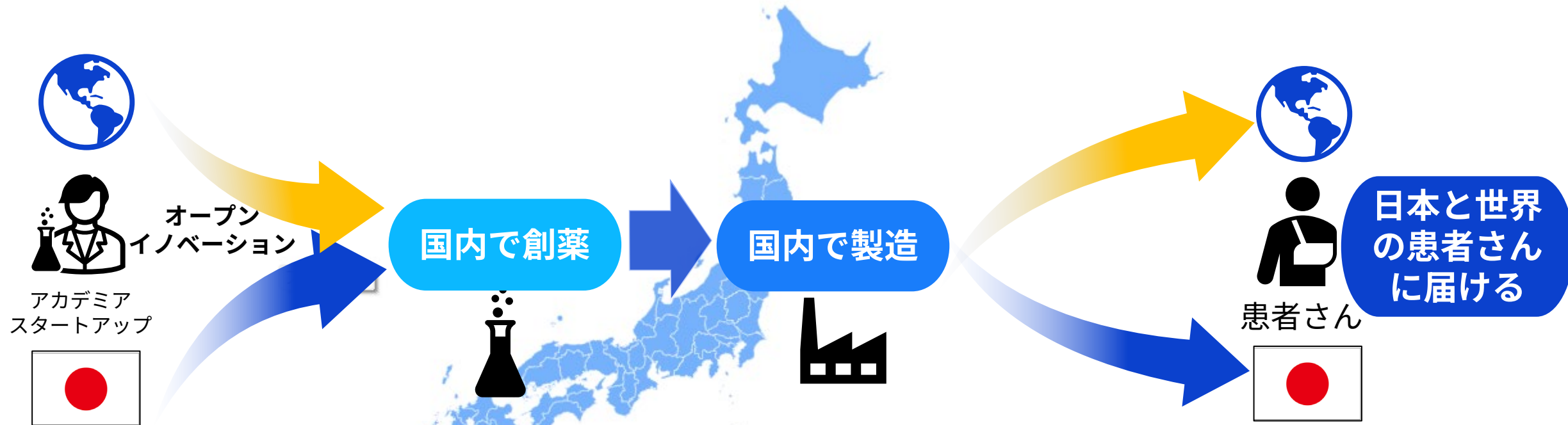


独自のモダリティ技術を創り、創薬プラットフォームに

- 中外では、次世代抗体など独自のモダリティ技術を創り上げ、疾患関連分子とマッチングさせる“技術ドリブン”の創薬アプローチで継続的に革新的医薬品を創製
- 製薬企業におけるモダリティ技術のプラットフォーム構築が創薬力強化に繋がる



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製薬産業が日本の経済成長を牽引する基幹産業になる

創薬・医薬品生産の地、投資先として、日本の魅力が低下



日本の魅力低下

基礎研究力の低下と
産学の人材流動性不足

日本発新薬の減少

製造人材の不足と
製造施設の海外流出

医薬安全保障リスク・貿易赤字

日本市場の低い成長性と
予見性の欠如

ドラッグラグ・ロスの拡大

日本の研究・製造環境の魅力を向上させる取組み

■ アカデミアの基礎研究・最先端モダリティ研究の支援

- アカデミアの自由な発想に基づく基礎研究に対する公的支援を拡充
(疾患バイオロジーや最先端モダリティなどの研究)
- アカデミアと企業間の人材交流支援

■ 企業が日本で製るための環境整備

- バイオ医薬品をはじめとした新規モダリティの製造人材育成
- 日本国内の研究所や製造拠点の新設に対する補助金や税制優遇等の公的支援を拡充

カテゴリー毎の薬価制度の構築

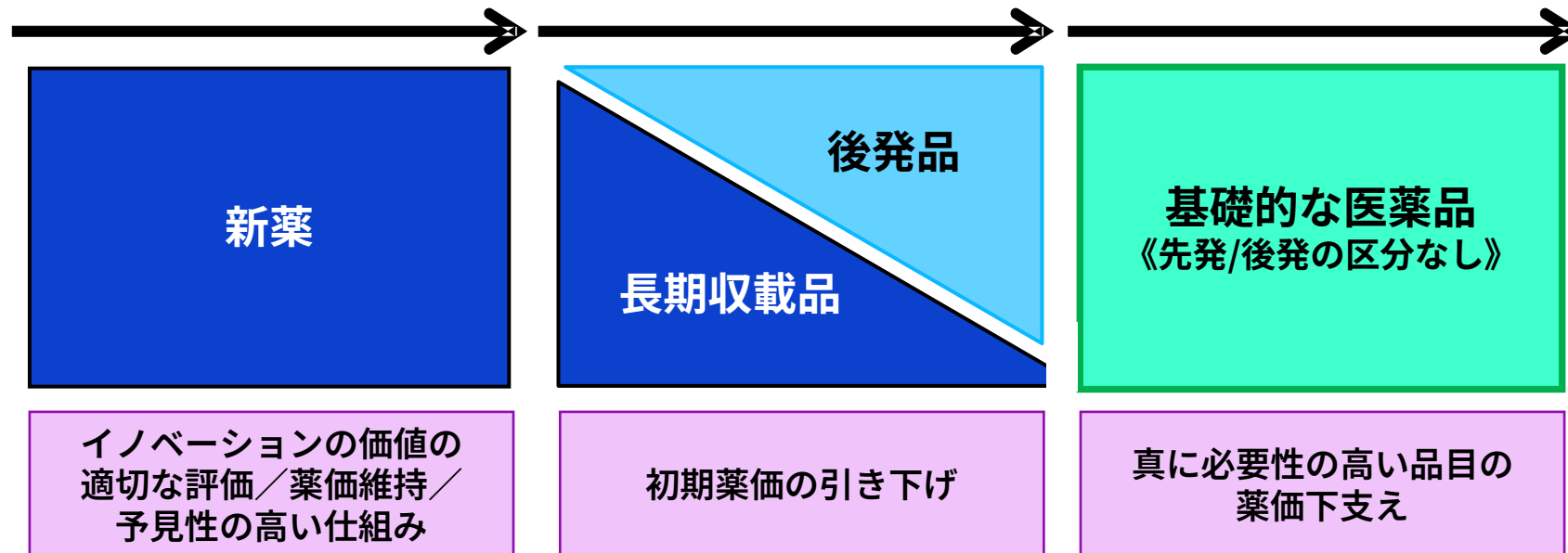
日本市場の予見性を担保し、投資魅力度を高めるために

■ 革新的新薬の適切な価値評価と新薬創出等加算品の特許期間中の薬価維持

- 従来の算定方式では評価できない価値を適切に評価する仕組みの構築
- 市場拡大再算定の廃止

■ 長期収載品と後発品の初期薬価の引き下げ

■ 医療上必要性の高い医薬品の薬価下支えの拡充

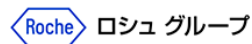


日本で^{つく}創って、^{つく}製って、日本と世界の患者さんに届ける

創造で、想像を超える。



中外製薬



ロシュ グループ



Public-Private Council for Improving Drug Discovery Capabilities

**To Create and Manufacture Innovative Drugs in Japan,
and Deliver them to Patients in Japan and around the World**

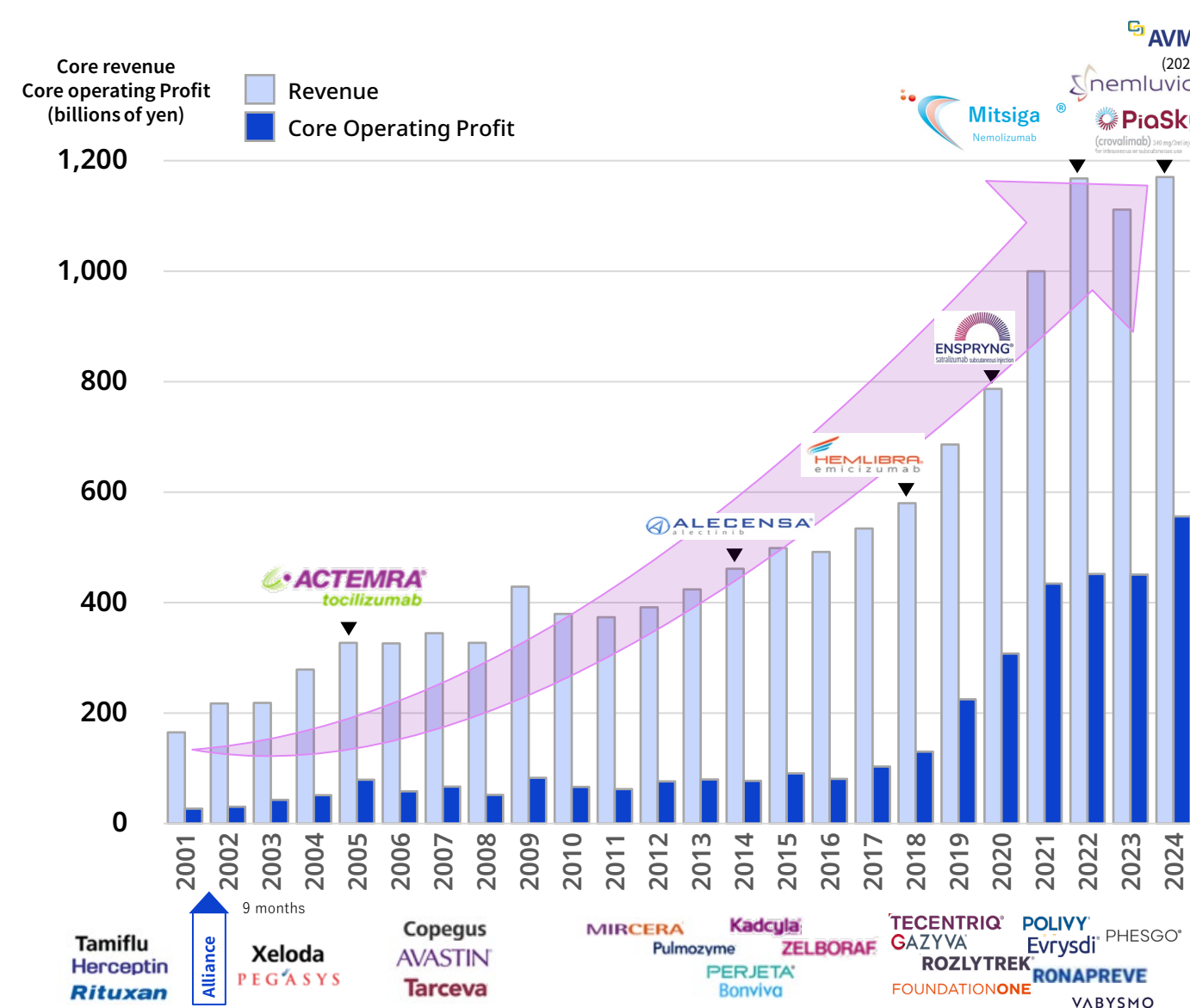
June 26, 2025

CHUGAI PHARMACEUTICAL CO., LTD.

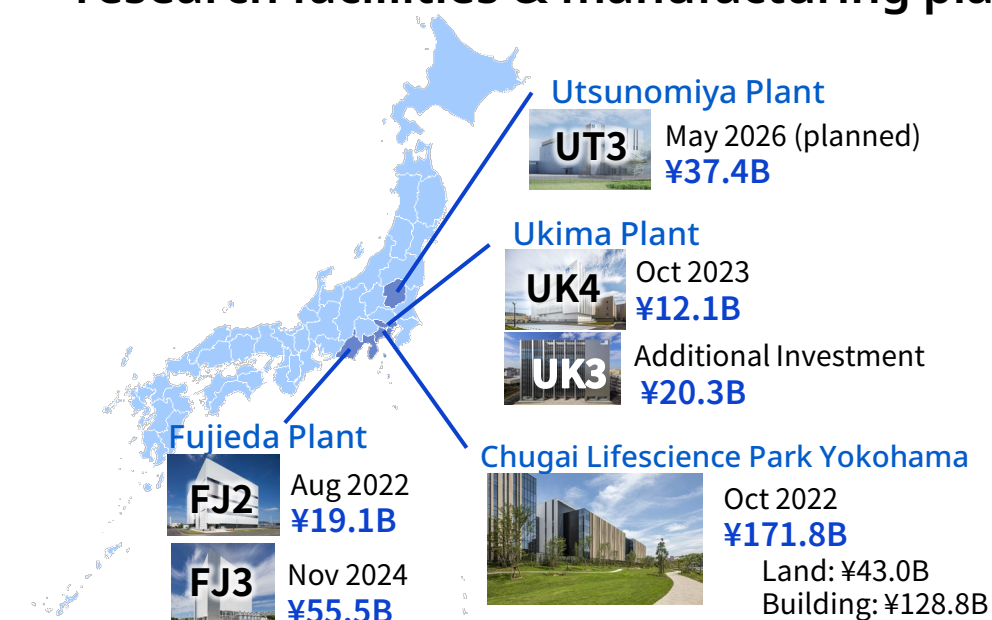
Representative Director, President & CEO

Osamu Okuda, Ph.D.

Chugai Pharmaceutical – Creating Innovative Drugs in Japan and Delivering them Globally, Achieving Dramatic Growth

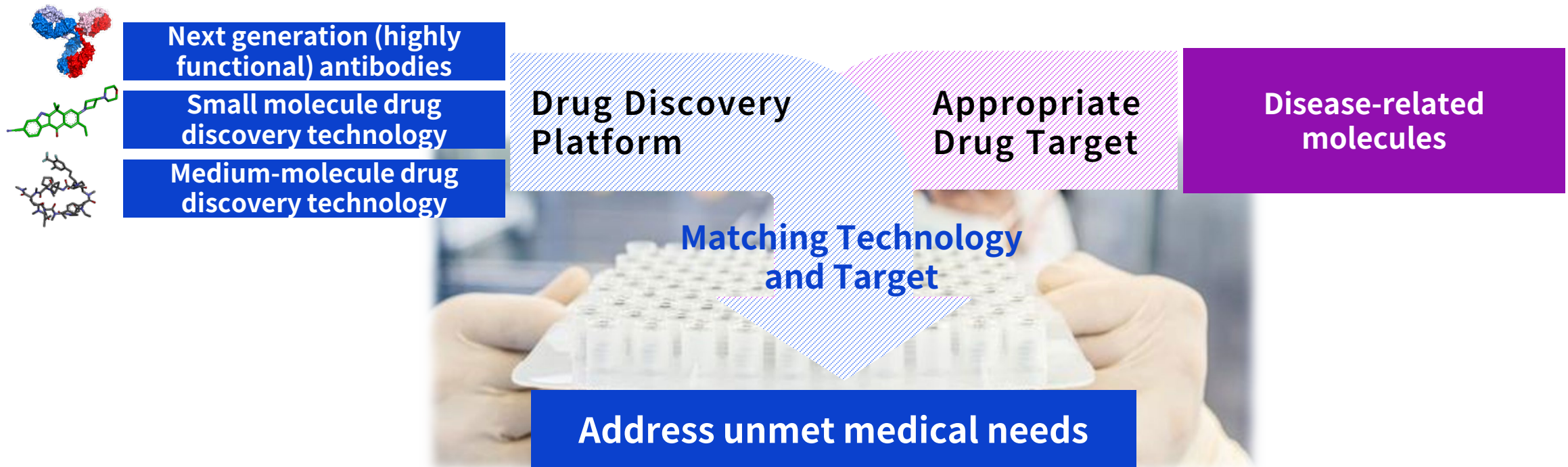


- 7 global drugs created since start of strategic alliance with Roche
 - Core Operating Profit: 21-fold increase, Revenue: 7-fold increase (2001-2024)
 - Market Cap: 11.75 trillion Yen*2 *2: As of the end of Dec. 2024 (No.1 in Japan's pharmaceutical industry)
- Active capital investment in domestic research facilities & manufacturing plants

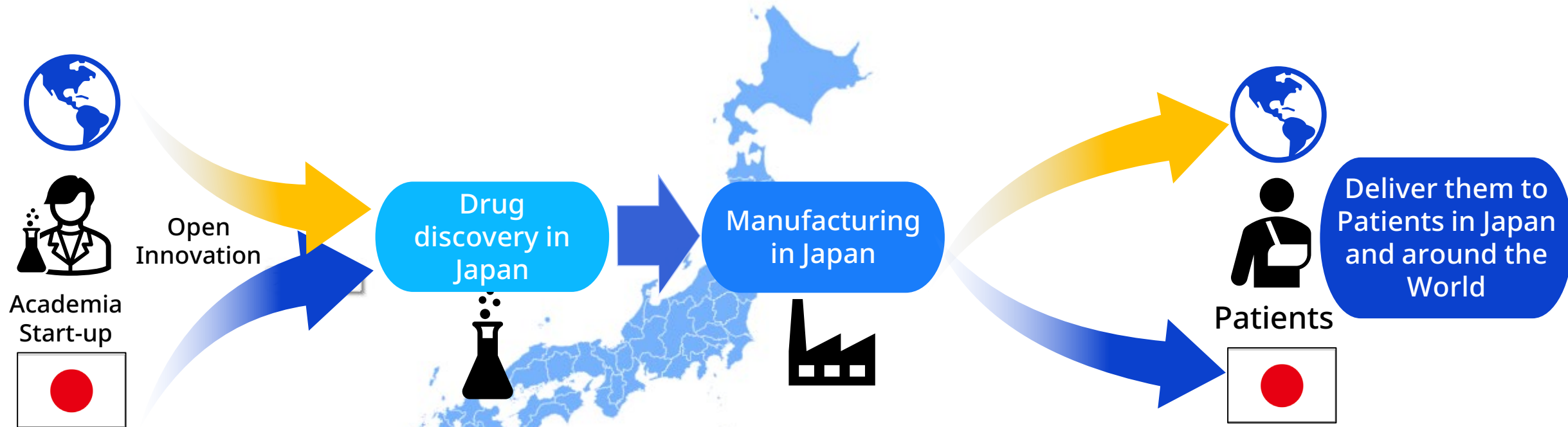


Creating Proprietary Modality Technologies as a Unique Drug Discovery Platform

- Chugai has continuously created innovative drugs through a "technology-driven" drug discovery approach, which involves developing proprietary drug discovery technologies (modalities) including next-generation antibodies, and matching them with disease-related molecules
- The establishment of modality technology platforms in pharmaceutical companies leads to enhanced drug discovery capabilities

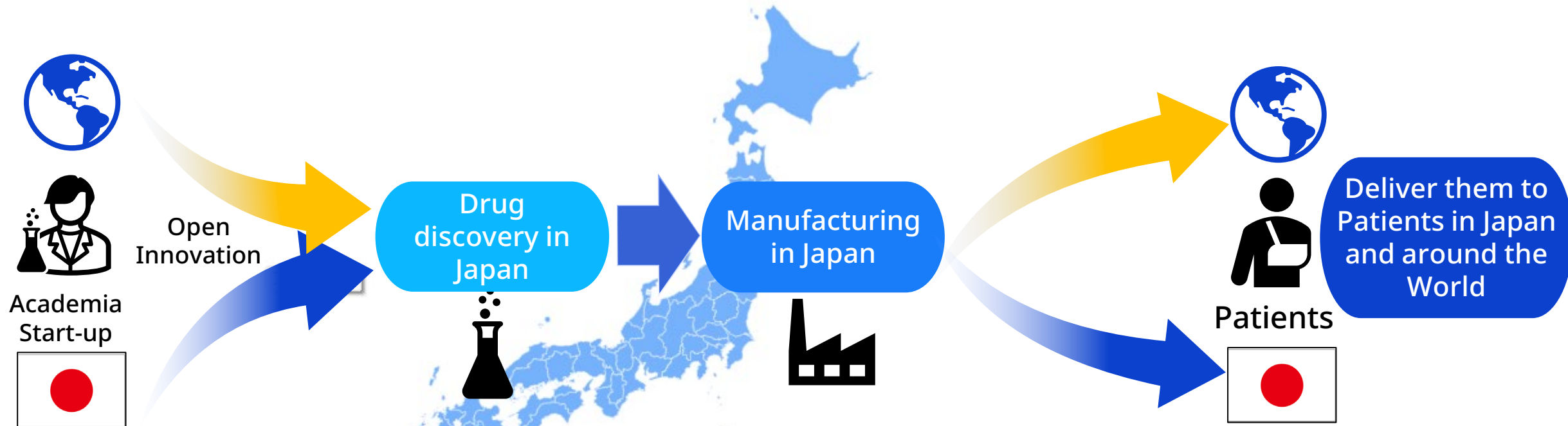


To Create and Manufacture Innovative Drugs in Japan, and Deliver them to Patients in Japan and around the World



The pharmaceutical industry will become a key industry that drives Japan's economic growth

Declining Attractiveness of Japan for Drug Discovery, Manufacturing, and Investment



Decline in Japan's attractiveness

Deteriorating basic research capabilities and limited academia-industry talent mobility

Decrease in new drugs discovered in Japan

Shortage of skilled manufacturing talents and Trend toward overseas manufacturing

Expansion of pharmaceutical security risks and trade deficits

Low growth potential and lack of predictability in the Japan's pharmaceutical market

Increase in drug lag / losses

Initiatives to Enhance the Attractiveness of Japan's Research and Manufacturing Environment

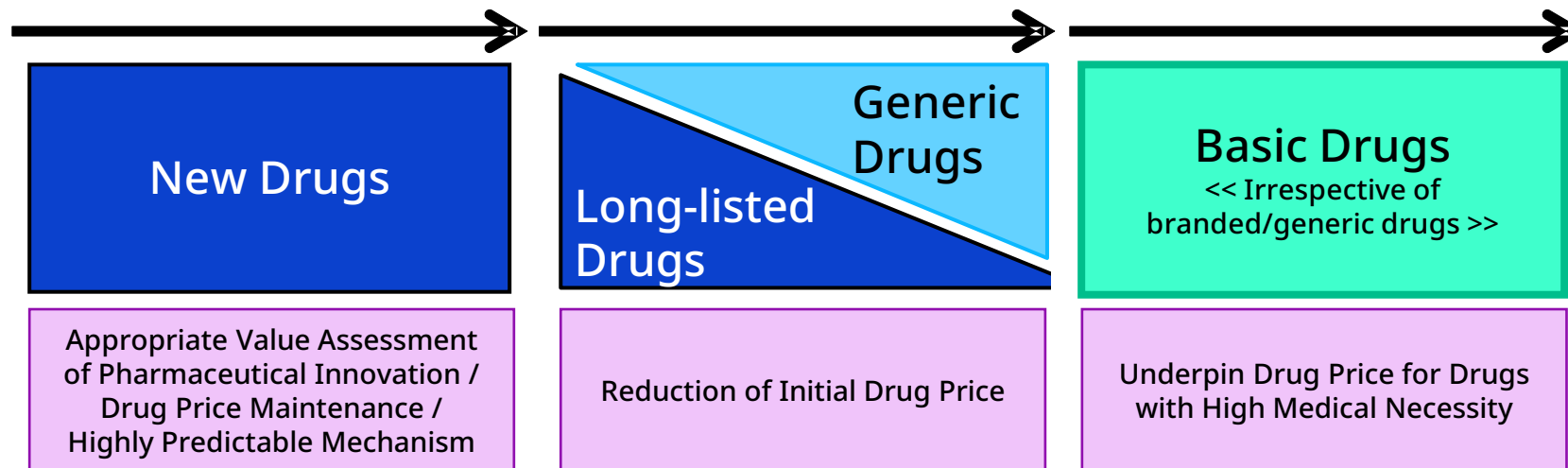
- Government Support for Academic Basic Research and Cutting-edge Modality Research
 - Expand public support for basic research based on academia's free ideation (research in disease biology, cutting-edge modalities, etc.)
 - Facilitate personnel mobility between academia and industry

- Government Support to Enhance Drug Manufacturing Capability and Capacity in Japan
 - Foster human resources for manufacturing new modalities including biologics
 - Expand public support such as subsidies and tax incentives for establishing new research facilities and manufacturing sites in Japan

Establishment of Category-based Drug Pricing System

To Ensure Predictability of Japanese Pharmaceutical Market and Enhance Investment Attractiveness

- Appropriate Value-based Pricing and Full Maintenance of Drug Price during Patent Period for Innovative New Drugs
 - Establish mechanisms to appropriately reflect values that cannot be assessed by conventional calculation methods in drug price
 - Abolish repricing for market expansion
- Initial Price Reduction of Long-listed Drugs and Generic Drugs
- Expansion of Underpinning Drug Price for Drugs with High Medical Necessity



**To Create and Manufacture Innovative Drugs in Japan,
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INNOVATION BEYOND IMAGINATION



CHUGAI PHARMACEUTICAL



A member of the Roche group