

Overview

Oncology is known for its variations in patient population and treatment by ethnicity, health habits, and healthcare systems among other factors. Therefore a thorough understanding of regional differences is a key factor for the success of oncology products. By using a large-scale

physician survey data ⁽¹⁾, this poster presentation aims to explore some of the differences between Japan and the US in oncology patient population and how it is managed.

In both countries, cancer is a common condition ranking around 10th by patient volume based on the estimated number of treated patients. Among the different cancer

types, common ones are similar between the two regions, however, there are differences in who are managing the condition: it seems that in general US is more focused on treatment and Japan is more focused on the target organ.

Assessment of the base population and the decision makers is important in understanding cancer markets.

Who is managing cancer?

In the US, cancer management is said to involve physicians of different specialties and it is reflected in this data. In Japan, the cancer management is more surgery-focused and organ-focused, which is also reflected in this data.

How many cancer patients are there?

Patient volume comparison of all surveyed diseases (approx. 400 diseases) shows that in both countries cancer comes at a similar position: 10th in the US and 12th in Japan

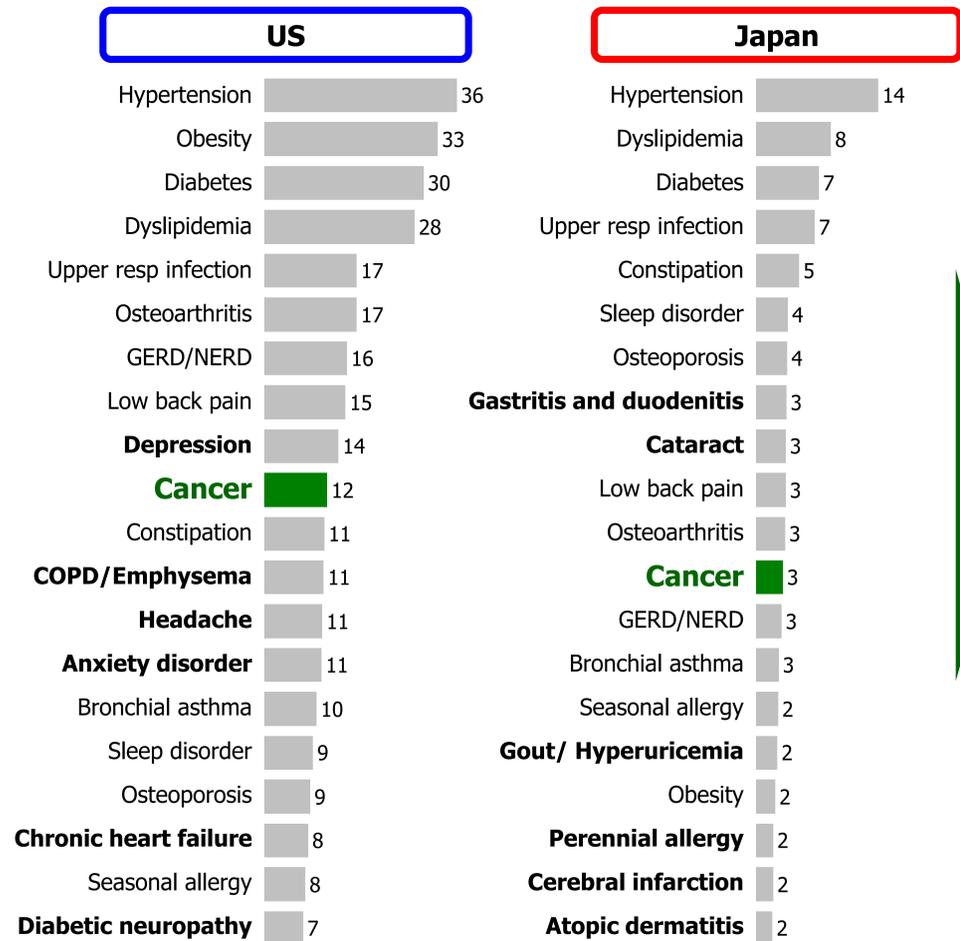
(Aggregate of top 15 cancer types out of 40, comprising 80-90% of total cancer). Within cancer, breast, colorectal, and prostate cancers are the most commonly found cancers in both countries. However, when the base populations of the

two regions (US: 314 mil, JP: 128 mil) are taken into account, some of the non-oncology diseases seem to have disproportionately high population, which is suggestive of a link to high prevalent cancer conditions.

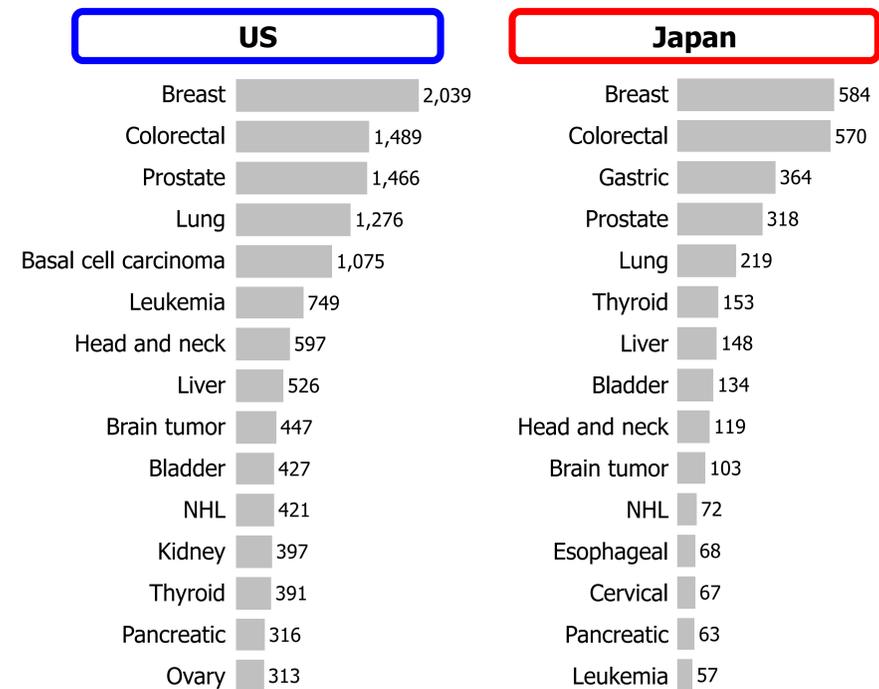
Patient Distribution by Speciality

(Unit: % of pts)

Top 20 among All Conditions



Top 15 Cancer

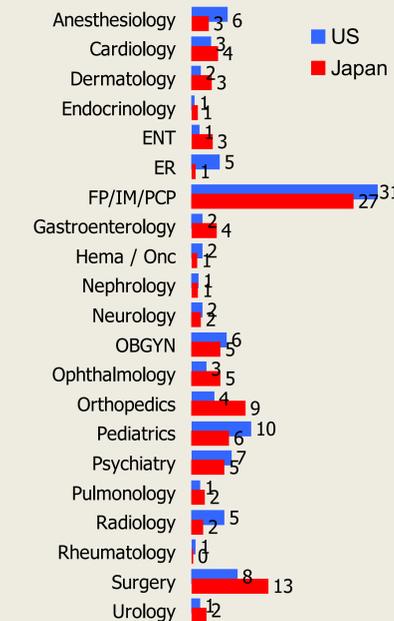


Sources:

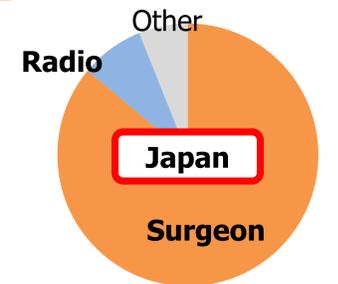
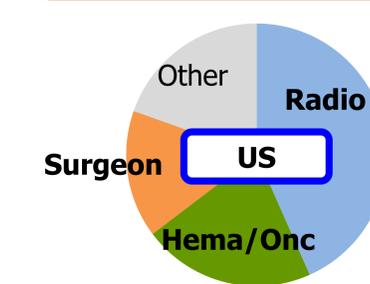
1. Patient population estimate: derived from **PatientsMap™** database, which describes the patient flow and other aspects using web survey with 27,000+ physicians in Japan and US for 400 conditions.
2. US physician statistics: American Medical Association; Physician Characteristics and Distribution in the US.
3. Japan physician statistics : Ministry of Health, Labour, and Welfare; Survey of Physicians, Dentists, and Pharmacists.

Speciality Breakdown

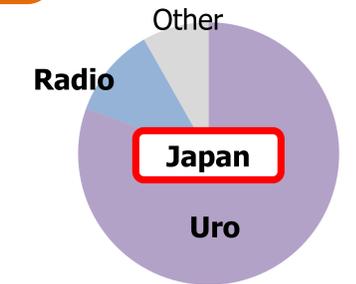
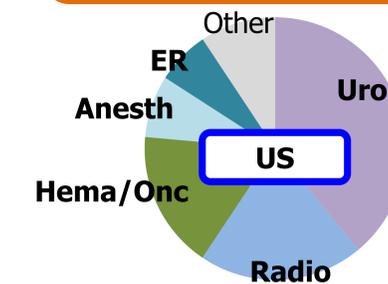
Below is a breakdown of physician population by speciality in each region based on government statistics. ^(2,3)



Breast cancer



Prostate cancer



Lung cancer

