



# Going Global

2013 Japan-Canada Trade Symposium

April 25<sup>th</sup>, 2013

Takeda Canada Inc.

**Mike Egli**



# Our Corporate Philosophy

## Takeda-ism

We pledge to act with Integrity, Fairness, Honesty and Perseverance at all times, especially when facing difficulties or challenges



## Mission

We strive towards better health for patients worldwide through leading innovation in medicine.

## Vision

Takeda's vision is to embody global pharmaceutical leadership through innovation, culture and growth guided by an unwavering commitment to significantly improve the lives of patients.

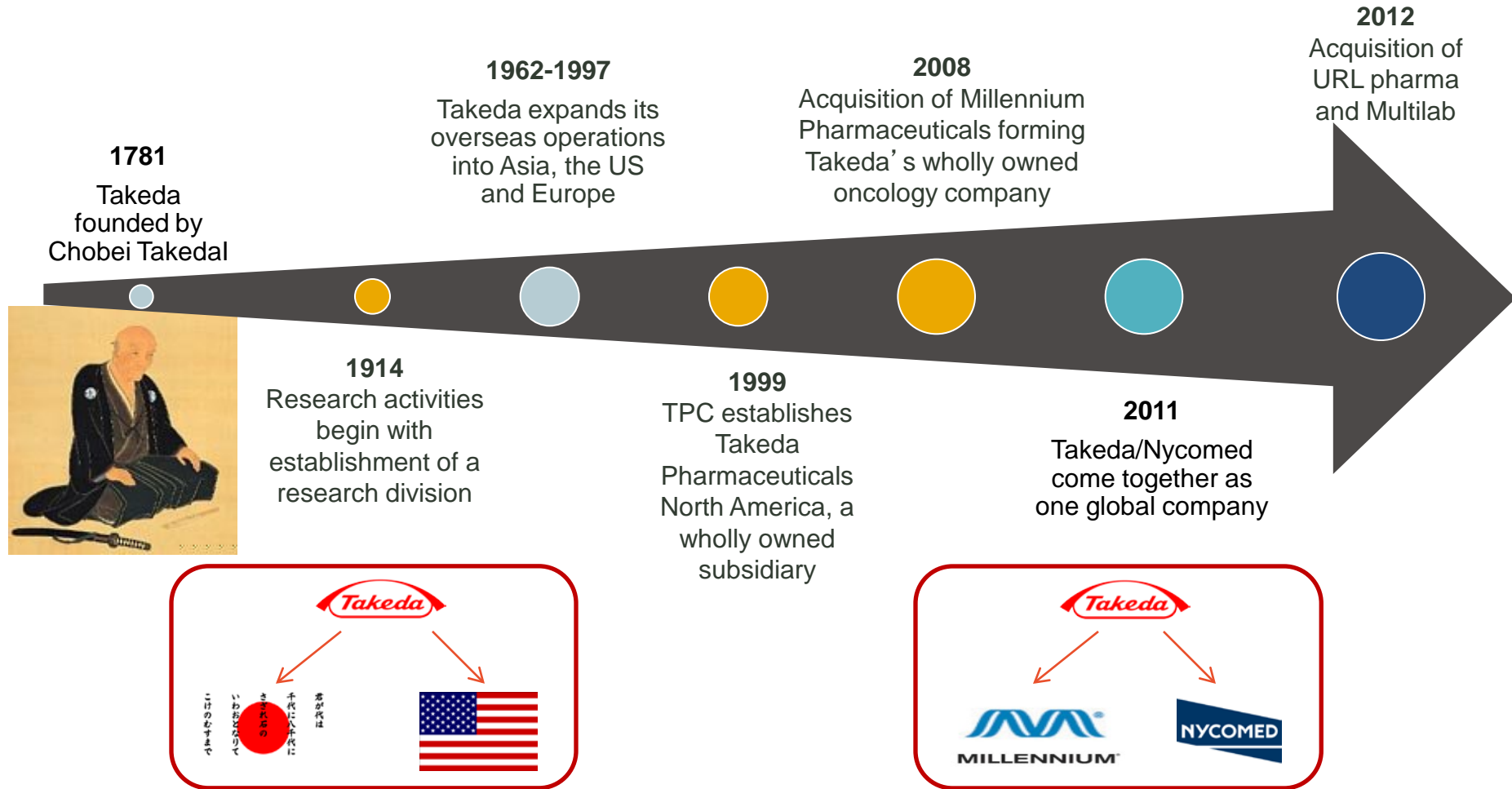
## Values

We focus on the following values while upholding the highest ethical standards:

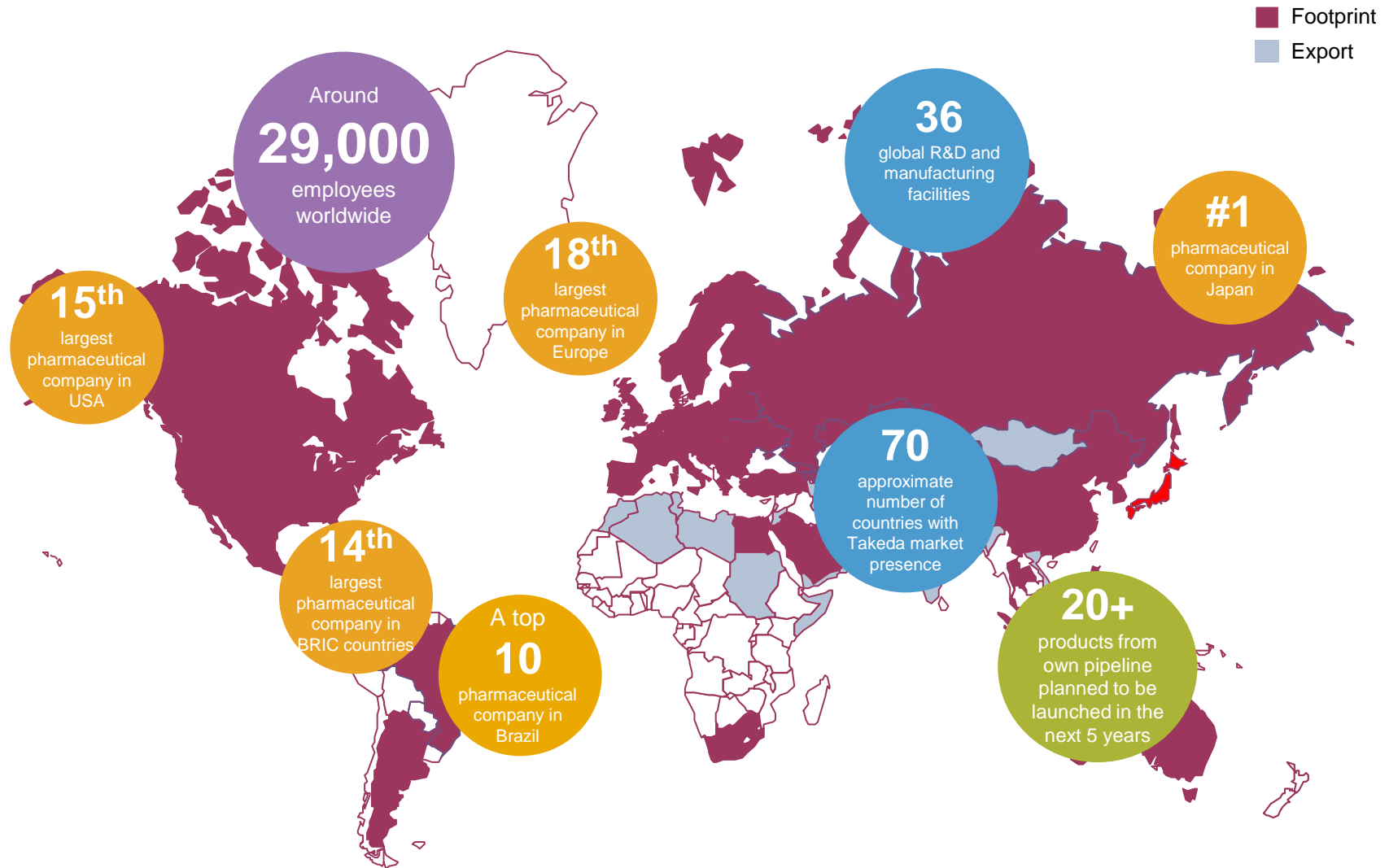
- Diversity
- Teamwork
- Commitment
- Transparency
- Passion
- Innovation



# A rich heritage and history



# Takeda is the 12<sup>th</sup> largest pharmaceutical company globally

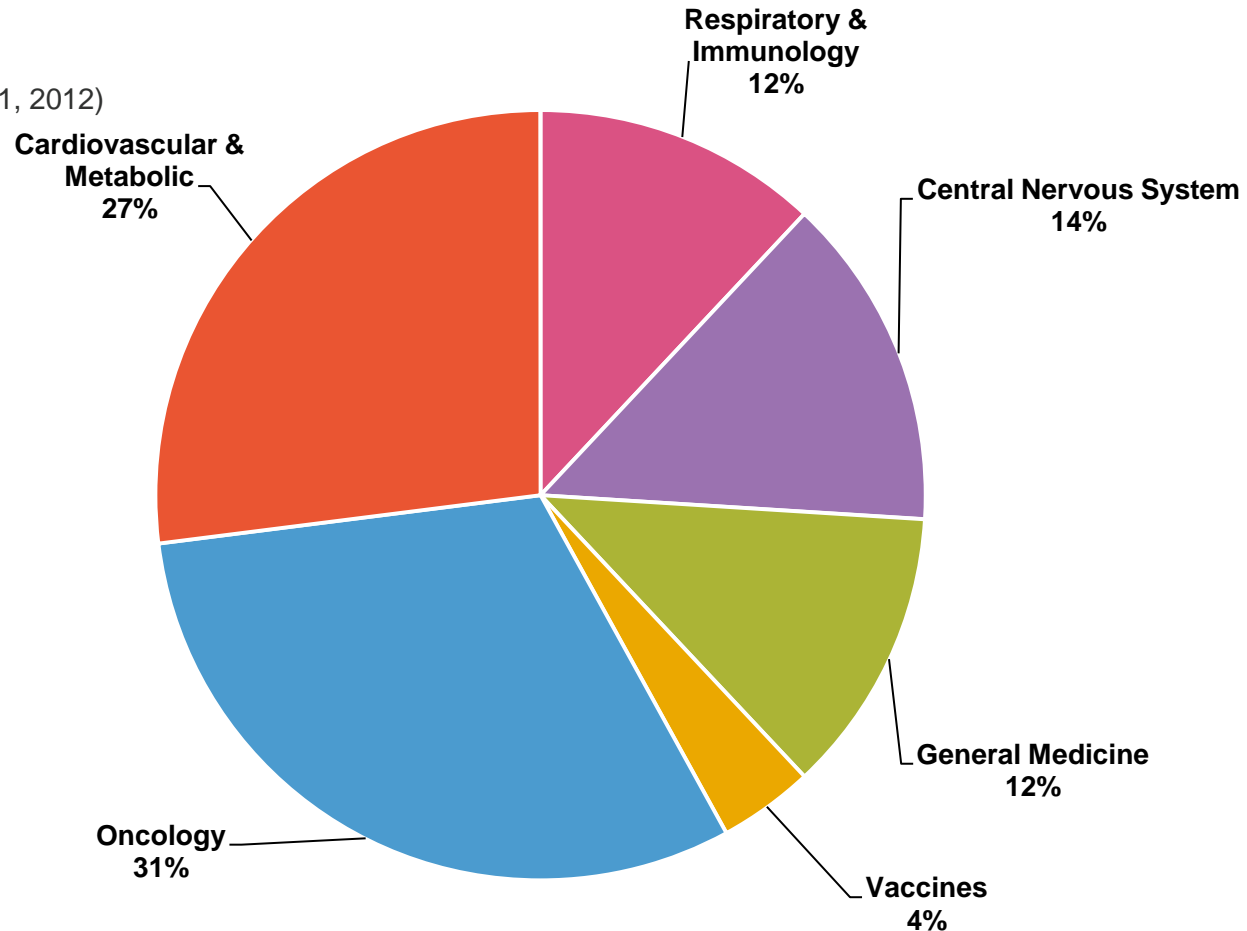


# 20% of revenues invested in R&D

- Percentage of projected R&D investment  
– By therapeutic area

FY2012 – 2014

(As reported on May 11, 2012)



# Top 10 companies by pipeline size (2012)



Position 2012 (2011)	Company	# of R&D products 2012 (2011)	# of originated products
1 (2)	GlaxoSmithKline	257 (269)	147
2 (1)	Pfizer	225 (284)	152
3 (3)	Merck & Co	223 (236)	150
4 (4)	Novartis	218 (200)	151
5 (5)	Hoffmann-La Roche	198 (183)	147
6 (6)	Sanofi	178 (182)	91
<b>7 (12)</b>	<b>Takeda</b>	<b>149 (103)</b>	<b>80</b>
8 (9)	Bristol-Myers Squibb	146 (149)	113
9 (8)	AstraZeneca	144 (167)	85
10 (7)	Johnson & Johnson	142 (171)	85

# Takeda's Pipeline: Phase III Trials



Takeda's pipeline has more products in phase III trials (as a percentage of its total pipeline) than any pharmaceutical company as of November of 2012\*, with more than 40 products in phase III development.

Rank	Company	% of Phase III
1	<b>Takeda</b>	<b>31</b>
2	Merck & Co. Inc.	28
3	Bayer	28
4	Boehringer Ingelheim	22
5	Novartis	20
6	Sanofi	20
7	Eli Lilly	19
8	Glaxo SmithKline	19
9	Johnson & Johnson	15
10	Bristol-Meyers Squibb	15
Industry Average		19.9

\*According to EvaluatePharma, as of November 2012.



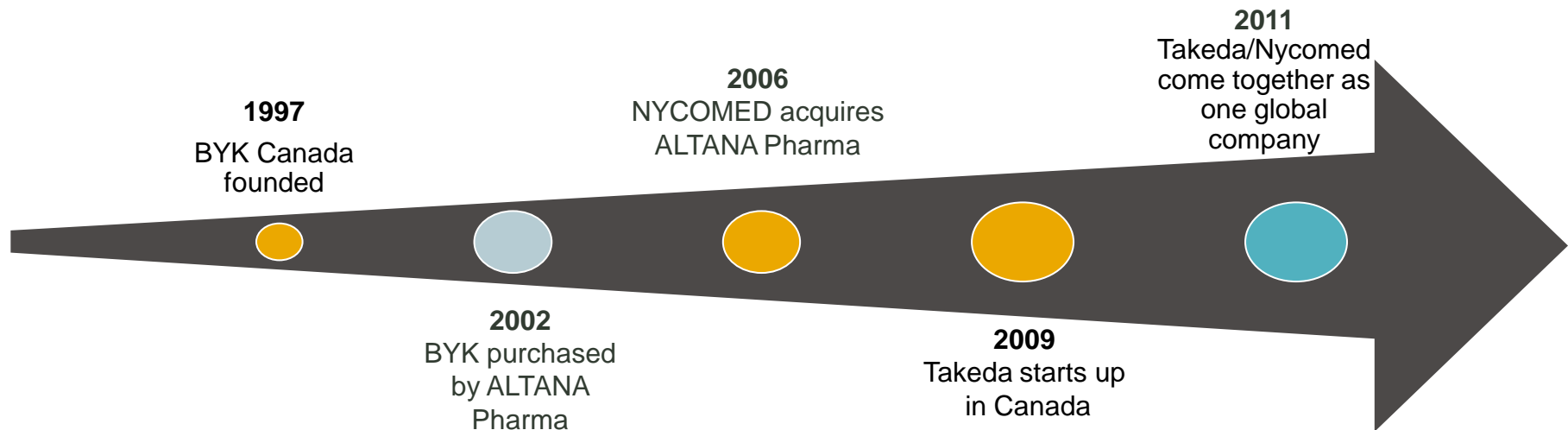
RESERVED  
PARKING  
ENTRY





# Takeda roots in Canada

- Headquarters in Oakville, Ontario
- 300 employees across Canada



# Takeda's rank within the branded Canadian pharmaceutical market



				Branded Market	
Rank	Company	MAT Feb 2012	MAT Feb 2013	\$ Share (%)	\$ Growth
	<b>Total Pharma Market</b>	<b>22,971,739,601</b>	<b>22,625,958,264</b>	<b>100.0</b>	<b>-1.51%</b>
	<b>Total Branded Market</b>	<b>17,504,293,953</b>	<b>17,243,865,656</b>	<b>100.0</b>	<b>-1.49%</b>
1	J & J	1,904,072,879	2,044,636,584	11.9	7.38%
2	PFIZER	1,689,368,268	1,700,671,909	9.9	0.67%
3	MERCK CANADA INC	1,120,828,344	1,117,957,943	6.5	-0.26%
4	ASTRAZENECA	1,672,381,585	1,101,058,172	6.4	-34.16%
5	NOVARTIS	997,374,460	1,031,074,269	6.0	3.38%
6	GLAXOSMITHKLINE	985,402,410	985,840,024	5.7	0.04%
7	ABBOTT	899,313,742	949,310,013	5.5	5.56%
8	ROCHE	744,192,821	764,520,247	4.4	2.73%
9	AMGEN	607,658,996	676,695,351	3.9	11.36%
10	BAYER INC	566,501,611	562,624,613	3.3	-0.68%
11	LILLY	488,511,325	522,542,577	3.0	6.97%
12	SANOFI-AVENTIS	477,695,420	488,459,393	2.8	2.25%
13	BRISTOL-MYERS SQUIBB	662,439,796	430,896,570	2.5	-34.95%
14	BOEHRINGER ING	445,758,346	410,229,275	2.4	-7.97%
15	PURDUE PHARMA	397,781,212	354,181,377	2.1	-10.96%
16	NOVO NORDISK CDA	277,152,535	330,540,938	1.9	19.26%
17	H LUNDBECK A/S	203,333,492	247,104,109	1.4	21.53%
18	VALEANT PHARMA	259,981,126	234,108,069	1.4	-9.95%
19	SERVIER LAB.	193,669,517	224,839,630	1.3	16.09%
20	PHARMASCIENCE	214,285,315	221,142,194	1.3	3.20%
21	<b>TAKEDA PHARMA NA</b>	<b>141,857,666</b>	<b>174,214,032</b>	<b>1.0</b>	<b>22.81%</b>

# Takeda Canada - Our therapeutic areas





# Recognized as Top Employer...





## The challenging environment in Canada

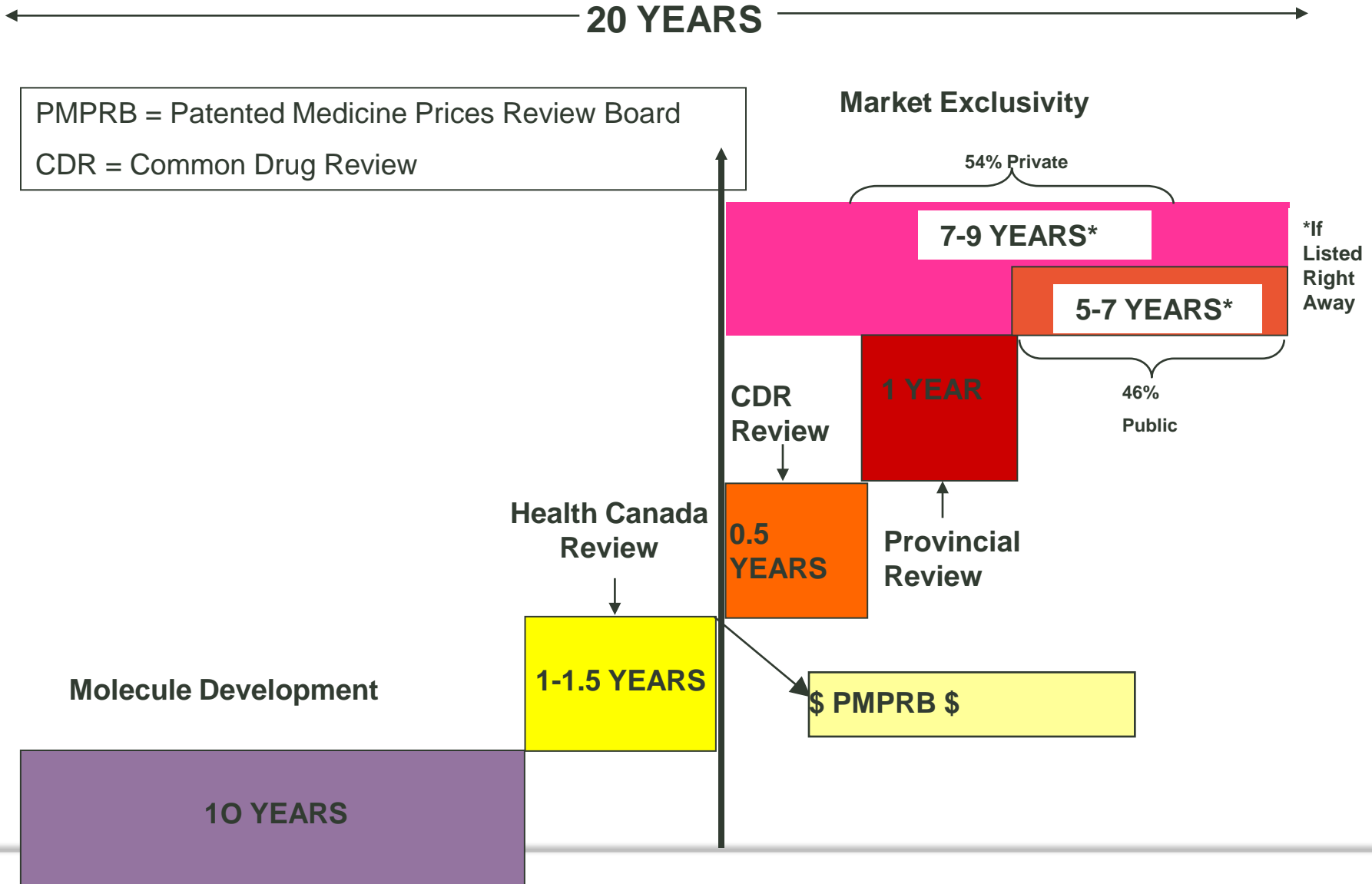
- Canadian population getting older
- More pressure from provinces to keep healthcare budgets down
- Patients waiting longer for new medications
- Variation in access to innovative medications
- Canada is more restrictive in IP rights

# Comparison of Canadian and Non-Canadian Pharmaceutical IP Regimes



	Japan	Canada	European Union	United States	
Right of Appeal	Canada and US are only major countries with "linkage" regimes.	PM (NOC) Regulations that link market approval to patent validity.  No provisional measures available.  Inequities in "linkage regime" (e.g. no right of appeal for innovators) favor generic manufactures over innovators.	No "linkage" regimes like in Canada or in US.  However, provisional measures (e.g. interlocutory relief ) also available in EU to prevent patent infringement.	Linkage regime similar to Canada's (the "Hatch-Waxman" system)  Absence of problematic inequities: e.g. innovators have a right of appeal.  Provisional measures available.	
Data Exclusivity	8 years exclusivity for new active product ingredients  6 years for new administered route or combination drugs  4 – 6 years for new indications or dosages	8 years exclusivity  <u>No</u> extension for new indications  Restrictions on Scope of Products	10 years exclusivity + 1 Year extension for new indications	<u>Chemical Entities</u>  5 years exclusivity + FDA approval time (1+ years) + 3 year extension for new indications	<u>Biologics</u>  12 years exclusivity
Patent Term Restoration	Maximum 5 years additional market exclusivity.  No maximum combined post-approval exclusivity	<b>None</b>	Maximum 5 years additional market exclusivity.  Maximum combined patent/ Supplemental Protection Certificates (SPC) post-approval market exclusivity of 15 years.	Maximum 5 years additional market exclusivity.  Maximum combined post-approval market exclusivity 14 years.	
Orphan Drugs IP Incentives	Extension of re-examination period up to 10 years	<b>None</b>	10 years market exclusivity	7 years market exclusivity	

# Drug Development Life Cycle

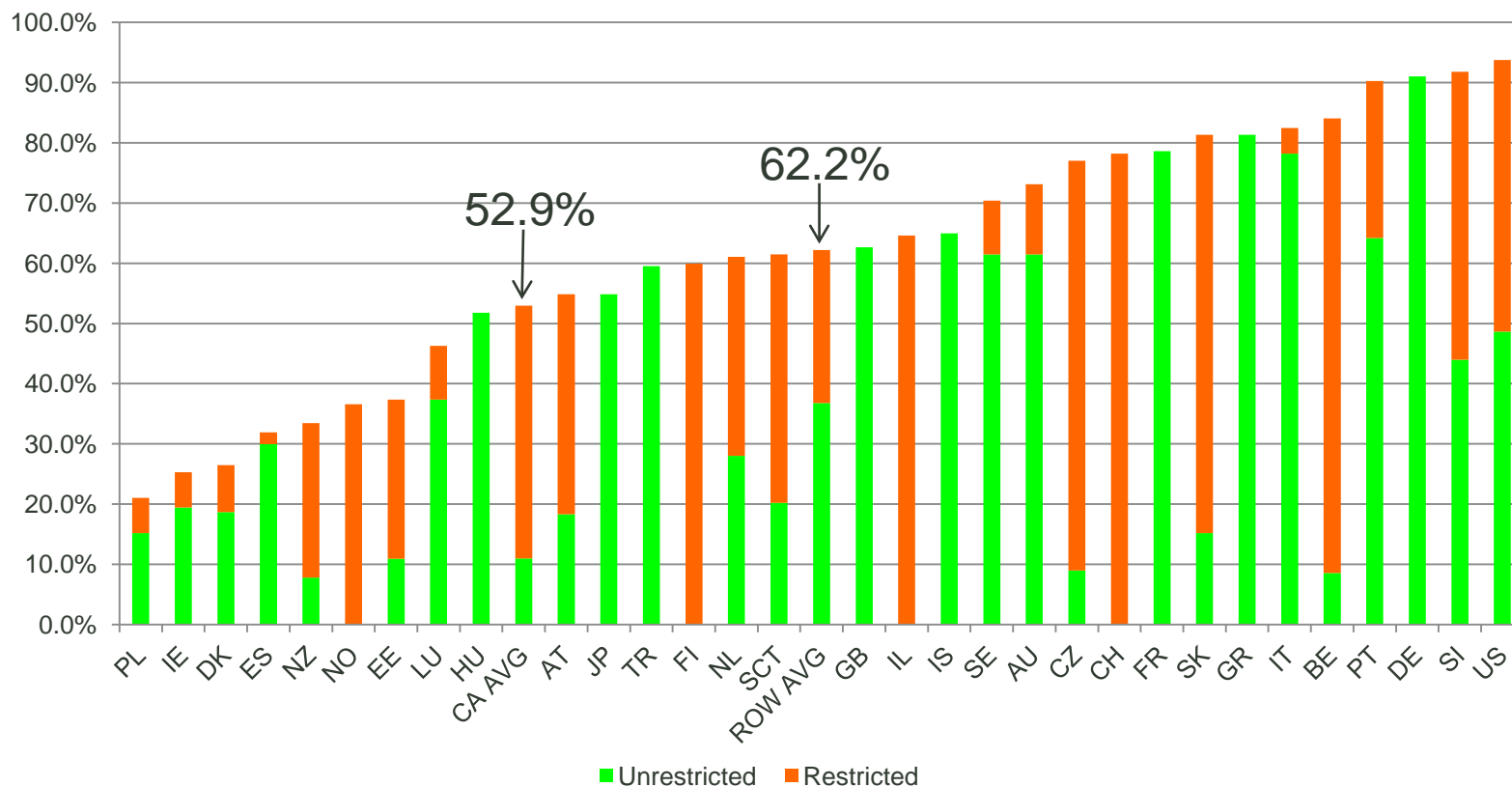


## 2011-2012 - International - Reimbursement Quality

All Eligible Drugs - Based on the Canadian List

Notes: Case-by-Case = Not Reimbursed | Canada Ranks 23 / 32

Source: Wyatt Health Management





# Mission

**We strive towards better health for patients worldwide  
through leading innovation in medicine.**

***Driven by passion. Committed to life.***

# Forward looking statement



This presentation contains forward-looking statements regarding the Company's plans, outlook, strategies and results for the future.

All forward-looking statements are based on judgments derived from the information available to the Company at this time. Forward looking statements can sometimes be identified by the use of forward-looking words such as "may," "believe," "will," "expect," "project," "estimate," "should," "anticipate," "plan," "continue," "seek," "pro forma," "potential," "target," "forecast," or "intend" or other similar words or expressions of the negative thereof.

Certain risks and uncertainties could cause the Company's actual results to differ materially from any forward looking statements contained in this presentation. These risks and uncertainties include, but are not limited to, (1) the economic circumstances surrounding the Company's business, including general economic conditions in the US and worldwide; (2) competitive pressures; (3) applicable laws and regulations; (4) the success or failure of product development programs; (5) decisions of regulatory authorities and the timing thereof; (6) changes in exchange rates; (7) claims or concerns regarding the safety or efficacy of marketed products or product candidates; and (8) integration activities with acquired companies.

We assume no obligation to update or revise any forward-looking statements or other information contained in this presentation, whether as a result of new information, future events, or otherwise.