

# **Overview of Japanese Biotechnology Industry**

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Takao Yukawa Ph.D.  
Quality Quest Australia Pty.Ltd.

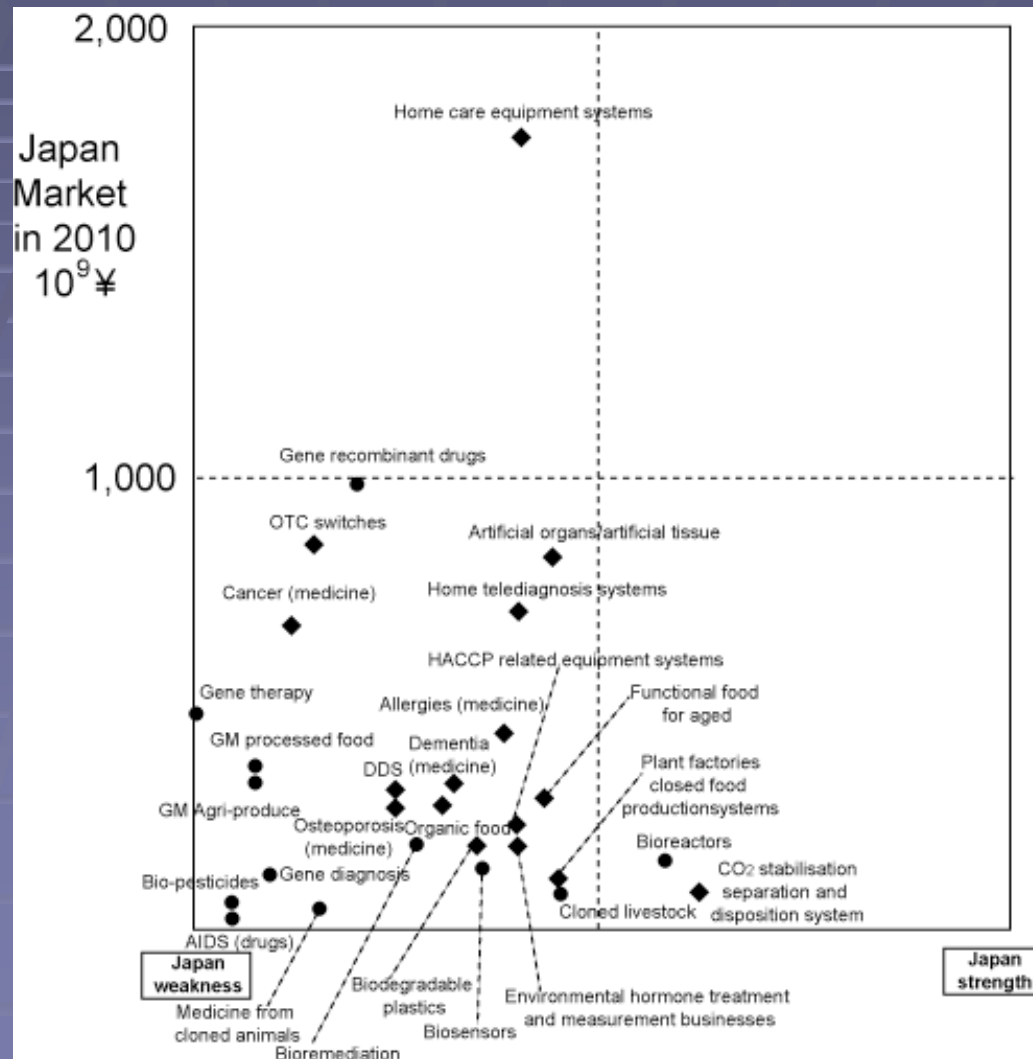
- Current and Predicted Market
- Drivers and Structure of the Industry
- Opportunities for Australian Companies

# Japanese Biotech Market in 2001

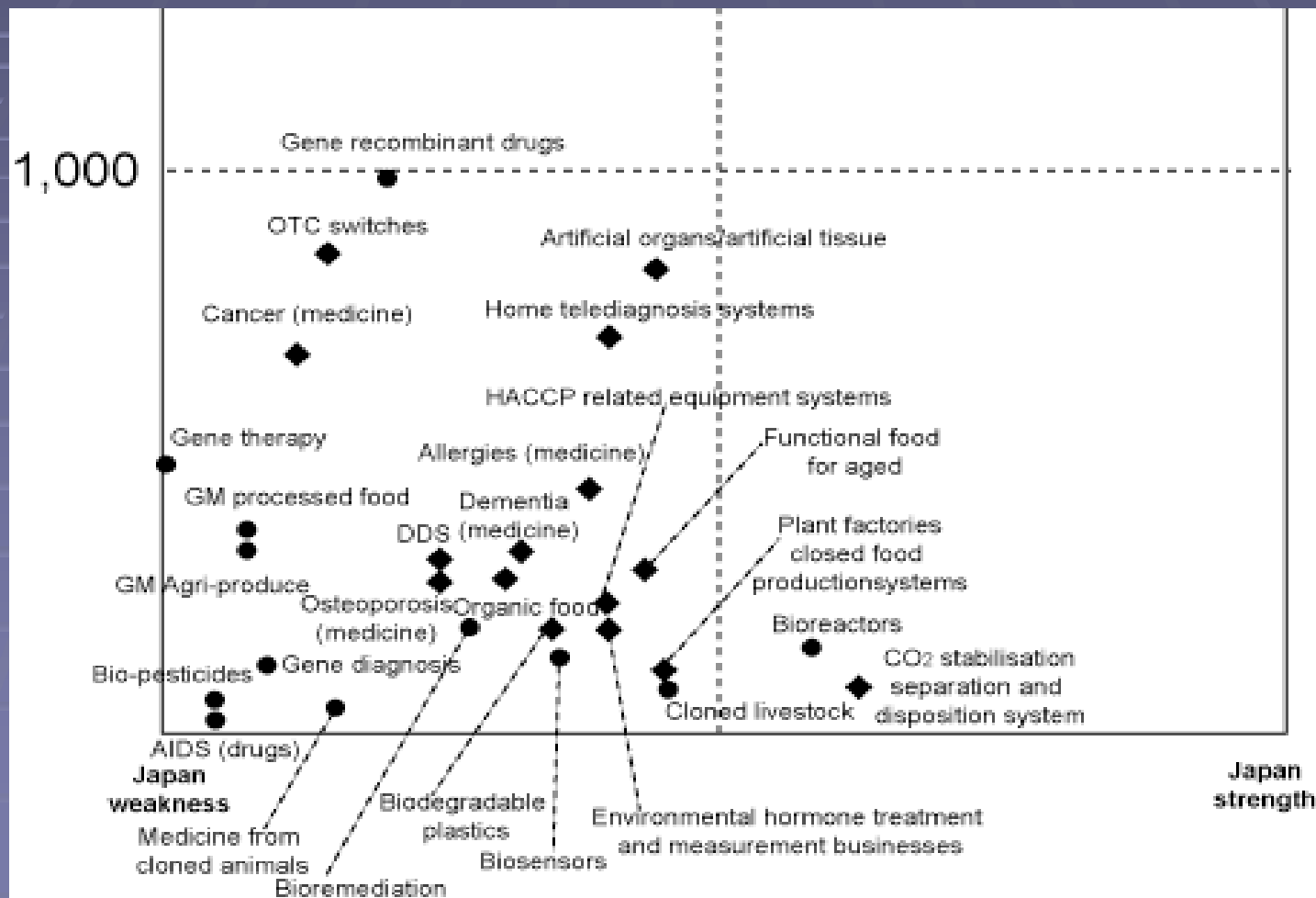
[Unit: Billion Yen≡\$A13 Million, Source: METI 2002]

Sector	Market Size
Human Health	536
Agri-Food	367
Bioprocess	244
Environment & Resources	3
Bioutil	140
Bioinformatics	29
Service and Others	26
Total	1344

# Japan's Global Competitiveness in Bio-related Products



# Japan's Global Competitiveness in Bio-related Products (Part)



## **Focus 21**

# **Economy Revitalization Project**

- Bio - IT Hybrid Equipment
- Glycoproteomics
- Proteomics
- Nano - Biotechnology

# Japanese Biotech Market 2001/2010

[Unit: Billion Yen≡\$A13 Million, Source: METI 2002 ]

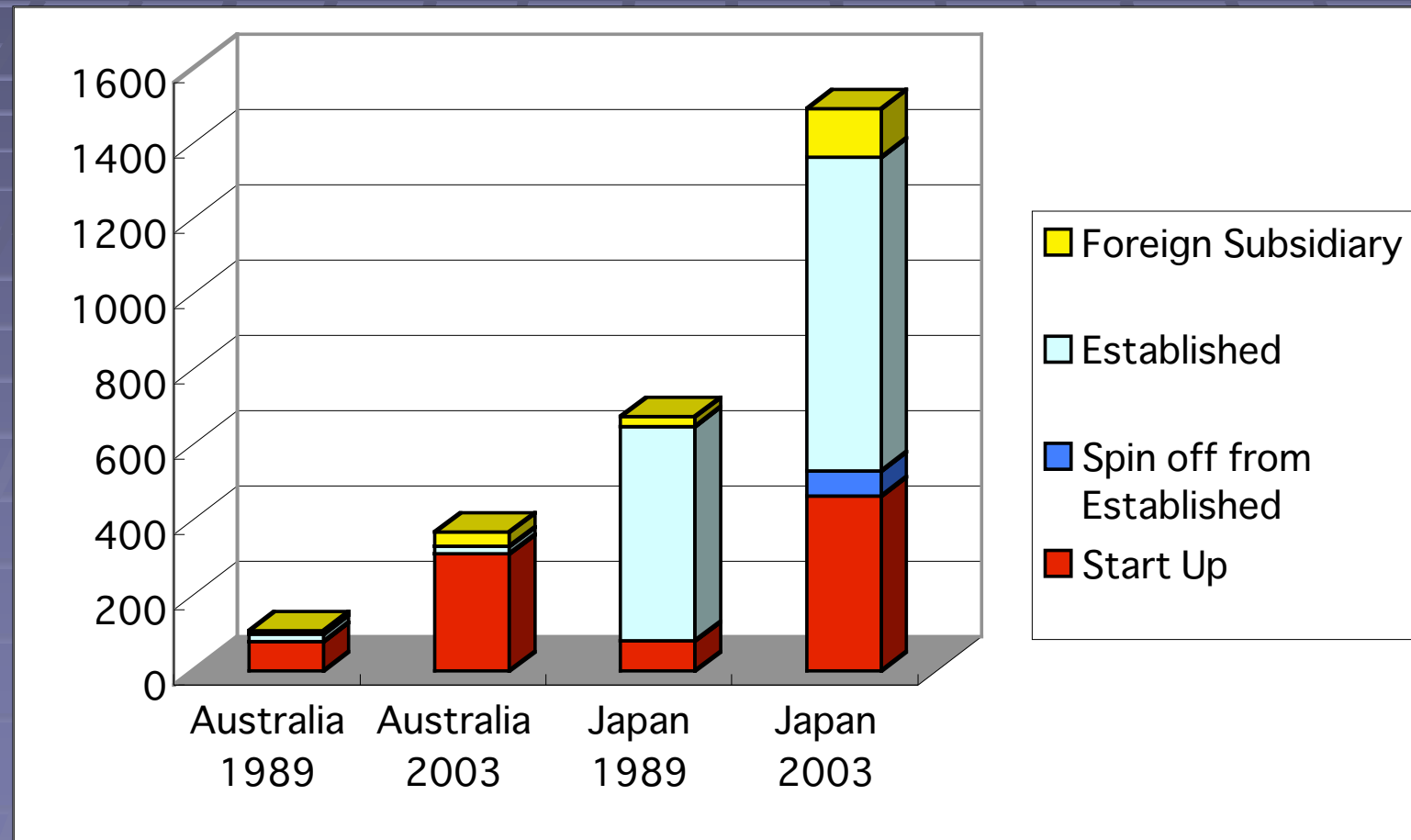
Sector	2001	2010	Required Growth p.a.
Human Health	536	8,400	36%
Agri-Food	367	6,300	37%
Bioprocess	244	3,600	35%
Environment & Resources	3	600	80%
Bioutil	140	3,100	41%
Bioinformatics	29	2,200	62%
Services & Others	26	800	46%
Total	1,344	25,000	38%

# How Many Biotech Start-ups in Japan?

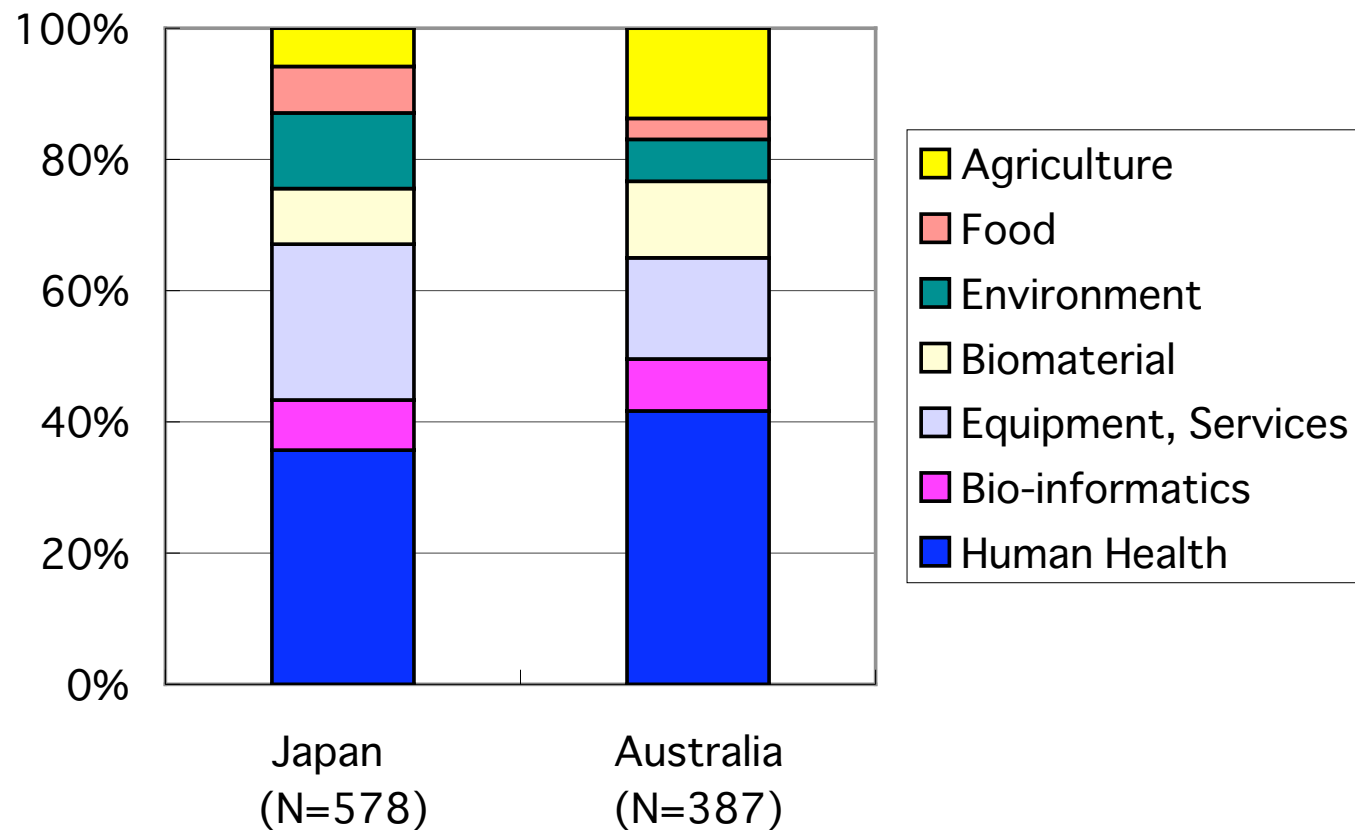
- A. Less than 100 (Ernst & Young, 2002)
- B. 303 (Yano Keizai, 2002)
- C. 334 (JBA, 2003)
- D. 550+ (Our database, 2003)



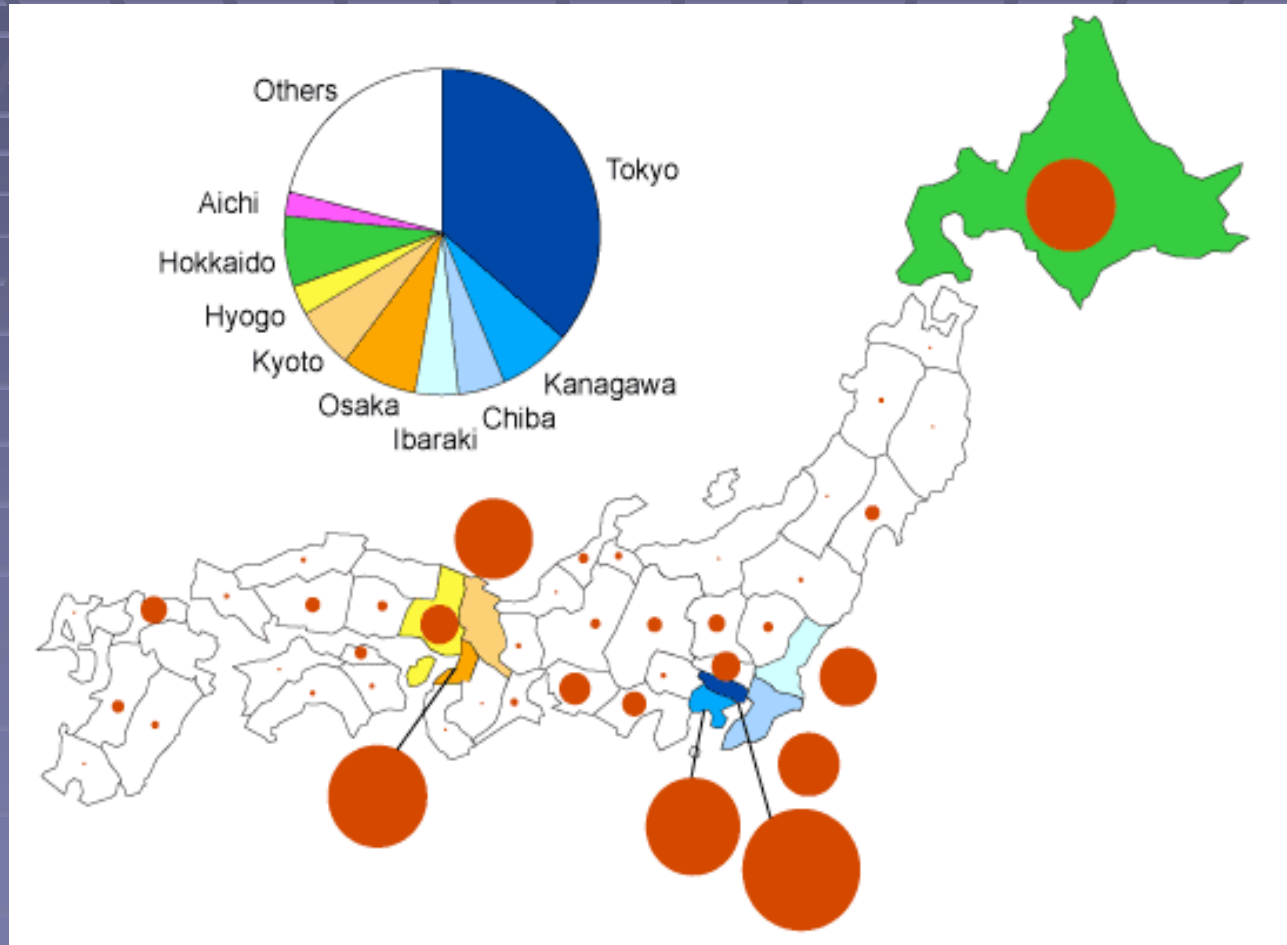
# Comparison of Number of Biotech Companies in Japan & Australia



# Comparison of Sectors of Start-ups in Japan & Australia



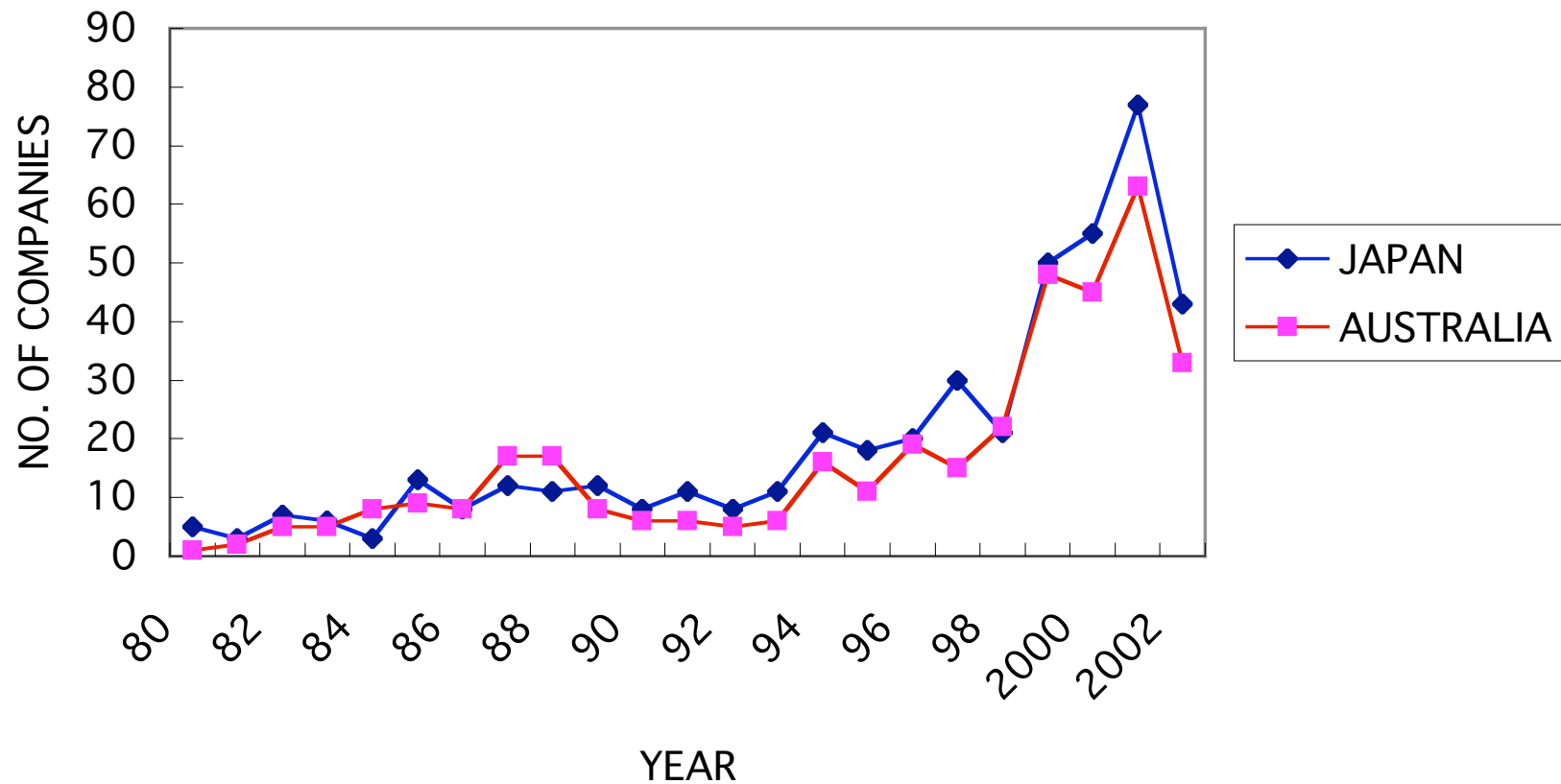
# Location of Biotech Start-up Companies in Japan



## Comparison of Density of Biotech Start-ups

Area /Country	No. of Start-ups	Population [Million]	No.of Start-ups per Million
Tokyo	196	11.9	16.5
Japan	548	125.6	4.4
Victoria	162	4.8	33.8
Australia	340	19.0	17.8
USA	1,457	279.0	5.2

# Year of Establishment of Biotech Start-ups in Japan & Australia



# **Analysis of Japanese Biotechnology Companies**

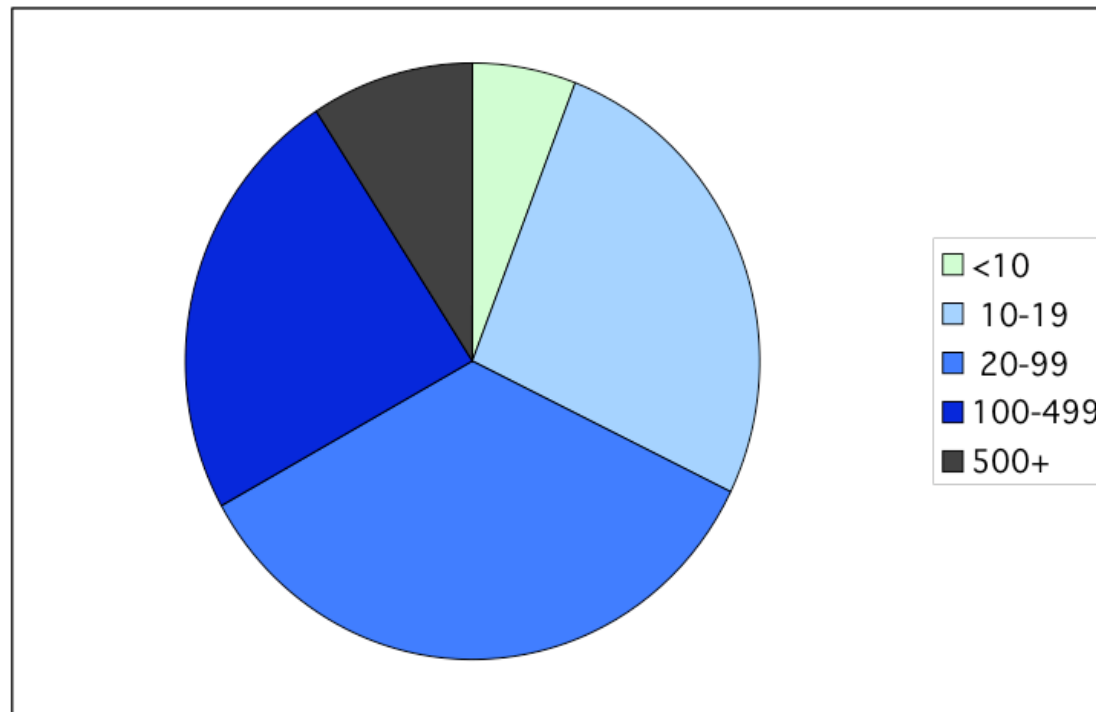
Old Structure Vs. New Structure  
(Financial Depth Vs. Prompt Decision Making)

Old Industry Vs. New Industry  
(Existing Infrastructure in Old Industry)

Large Company Vs. Small Company  
(Out Sourcing is a Key for Success of Small Companies)

# Paid Up Capital of Start-ups in Japan

[Unit: 10 Million Yen ≒ \$A13 K]



## Example of Use of Database

### Screening of companies with “bone”

Company	Area of activity
AC Biotechnologies	Osteoporosis diagnosis
Japan Tissue Engineering	Regeneration of bone and cartilage
Locomogen	Osteoporosis treatment
Meira Corporation	Bone joint device
MMT	Regeneration of bone with porous ceramic
Osteogenesis	Regeneration of jaw bone
Two Cell	Regeneration of bone