

Japan Lipid Lowering Drugs Market, By Drug (Statins & Combination, PCSK9 Inhibitors, Bile Acid Sequestrants, Fibrates, Cholesterol Absorption Inhibitors, Others), By Indication (Hypercholesterolemia, Coronary Artery Disease, High Triglycerides), By Distribution Channel (Retail Pharmacies, Hospital Pharmacies, Online Pharmacies), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Report description:

Japan Lipid Lowering Drugs Market was valued at USD 504.72 Million in 2024 and expected to reach USD 672.99 Million by 2030 with a CAGR of 4.87% during the forecast period. The Japan Lipid Lowering Drugs Market is primarily driven by the rising prevalence of cardiovascular diseases (CVDs), a major health concern in Japan. As the population ages, the incidence of conditions such as hyperlipidemia, which significantly contributes to heart disease and stroke, has increased, boosting the demand for effective lipid-lowering treatments. Advancements in pharmaceutical research have led to the development of new and more effective lipid-lowering agents, including novel statins, PCSK9 inhibitors, and combination therapies, which are enhancing treatment outcomes and patient adherence. The Japanese healthcare system's focus on preventive care and early intervention, supported by comprehensive health insurance coverage, also facilitates access to these medications. Growing awareness of the benefits of managing cholesterol levels to prevent CVDs is driving market growth. As research continues to yield new treatment options and the population's awareness and healthcare access improve, the Japan Lipid Lowering Drugs Market is expected to expand further.

Key Market Drivers

Increasing Prevalence of Cardiovascular Diseases

The Japan Lipid Lowering Drugs Market is notably propelled by the escalating prevalence of cardiovascular diseases (CVDs) within the country. As Japan experiences a demographic shift towards an older population, the incidence of CVDs such as heart disease, stroke, and hypertension has risen significantly. This aging population is particularly vulnerable to these conditions, leading to a

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higher prevalence of hyperlipidemia—a condition marked by elevated lipid levels in the blood, which is a critical risk factor for CVDs. Consequently, managing hyperlipidemia through lipid-lowering medications has become increasingly essential in preventing and controlling cardiovascular diseases.

The rising incidence of hyperlipidemia, driven by factors such as sedentary lifestyles, poor dietary habits, and genetic predispositions, creates a growing demand for effective lipid-lowering therapies. High cholesterol levels are a well-documented precursor to cardiovascular events, making the management of lipid levels a crucial aspect of cardiovascular risk reduction. The increasing burden of CVDs highlights the urgent need for widespread adoption of therapies designed to lower cholesterol levels and mitigate associated cardiovascular risks.

In response to this growing health challenge, the Japanese healthcare system and pharmaceutical industry are focusing on advancing and promoting lipid-lowering treatments. The market has seen significant investments in research and development to introduce new and innovative drugs that can more effectively target and manage elevated cholesterol levels. The development of new classes of lipid-lowering agents, such as PCSK9 inhibitors and novel formulations, reflects the ongoing efforts to enhance treatment efficacy and patient outcomes. The increasing number of patients diagnosed with high cholesterol and related conditions underscores the demand for a variety of therapeutic options. Patients and healthcare providers are seeking medications that offer not only improved lipid profiles but also better safety profiles and tolerability. The emphasis on personalized medicine and the availability of tailored treatments further drive the market, as healthcare providers aim to optimize therapy based on individual patient needs and risk factors.

Government Initiatives and Healthcare Policies

Supportive government initiatives and healthcare policies are pivotal in driving the Japan Lipid Lowering Drugs Market, reflecting a strategic focus on enhancing public health and managing the burden of cardiovascular diseases. The Japanese government has instituted several measures to promote preventive healthcare and early intervention, which are essential for managing hyperlipidemia and reducing associated cardiovascular risks.

One of the key components of these initiatives is the development and dissemination of guidelines and recommendations for managing high cholesterol and other lipid disorders. These guidelines provide healthcare professionals with evidence-based practices for diagnosing and treating hyperlipidemia, ensuring that patients receive standardized and effective care. By setting clear protocols for treatment, the government helps to facilitate the widespread use of lipid-lowering drugs, thereby driving market growth.

Comprehensive health insurance coverage in Japan is another significant factor supporting the Japan Lipid Lowering Drugs Market. The Japanese healthcare system is renowned for its extensive insurance coverage, which includes lipid-lowering medications. This coverage ensures that patients can access necessary treatments without facing prohibitive out-of-pocket costs, making lipid-lowering drugs more accessible to a broader segment of the population. The financial support provided by health insurance reduces barriers to treatment and encourages adherence to prescribed therapies, contributing to better management of hyperlipidemia and improved cardiovascular outcomes. In addition to financial coverage, the government has undertaken various initiatives to raise public awareness about the importance of managing cholesterol levels and preventing cardiovascular diseases. Public health campaigns and educational programs aim to inform the population about the risks associated with high cholesterol and the benefits of early intervention. These initiatives not only educate individuals about the need for regular health screenings but also emphasize the role of lipid-lowering medications in preventing serious cardiovascular events. By fostering a culture of proactive health management, these efforts contribute to increased demand for lipid-lowering drugs.

Rising Incidence of Obesity and Lifestyle-Related Diseases

The increasing prevalence of obesity and lifestyle-related diseases in Japan represents a major driver of the Japan Lipid Lowering Drugs Market. As Japanese society faces a growing incidence of these conditions, there is a rising need for effective treatments to manage associated health risks, particularly hyperlipidemia, which is a key contributor to cardiovascular disease. Modern lifestyle changes, including sedentary behavior and poor dietary habits, have significantly impacted public health in Japan. Sedentary lifestyles, characterized by prolonged periods of inactivity, and dietary patterns high in saturated fats and sugars contribute to the rise in obesity rates and the prevalence of metabolic syndrome. These lifestyle factors are directly linked to the development of hyperlipidemia, a condition marked by elevated levels of lipids, such as cholesterol and triglycerides, in the blood. Hyperlipidemia is a significant risk factor for cardiovascular diseases, including heart disease and stroke. According to a study titled, "Real-World

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Clinical Profile of Patients Prescribed Evolocumab in Japan", This retrospective database study analyzed patients from the MDV database who began treatment with evolocumab between April 2016 and November 2021. The study describes the characteristics and clinical profiles of these patients, with a total of 4,022 individuals included in the final analysis. The majority of evolocumab prescriptions were dispensed in outpatient settings (3,170 patients; 78.82%), and 940 patients (23.37%) had recently been diagnosed with familial hypercholesterolemia. At baseline, common atherosclerotic cardiovascular disease events included myocardial infarction (1,633 patients; 40.60%), unstable angina (561 patients; 13.95%), and ischemic stroke (408 patients; 10.14%). Comorbid conditions included hypertension (2,504 patients; 62.26%), heart failure (1,750 patients; 43.51%), diabetes (1,199 patients; 29.81%), and chronic kidney disease (297 patients; 7.38%). Among the lipid-lowering regimens used alongside evolocumab, the most common was ezetimibe plus statin (1,281 patients; 31.85%), followed by no additional lipid-lowering therapy (1,190 patients; 29.59%), statin alone (950 patients; 23.62%), and ezetimibe alone (601 patients; 14.94%). The median duration of evolocumab treatment for all patients was 260 days, with an interquartile range of 57 to 575 days.

As the incidence of obesity and metabolic syndrome increases, so does the demand for effective lipid-lowering medications. Obesity and metabolic syndrome are often associated with higher levels of low-density lipoprotein (LDL) cholesterol and triglycerides, as well as lower levels of high-density lipoprotein (HDL) cholesterol. These lipid imbalances exacerbate cardiovascular risks, making the management of cholesterol levels a critical aspect of preventing and treating cardiovascular conditions. The rise in obesity and lifestyle-related diseases has led to an increased focus on managing cholesterol levels to reduce the risk of cardiovascular complications. Healthcare professionals are increasingly prescribing lipid-lowering drugs, such as statins, fibrates, and other newer therapies, to address these imbalances and improve patient outcomes. This growing emphasis on lipid management drives demand for such medications and contributes to the overall growth of the Japan Lipid Lowering Drugs Market.

Clinical Evidence and Research Supporting Efficacy

Clinical evidence and research supporting the efficacy of lipid-lowering drugs play a pivotal role in driving the Japan Lipid Lowering Drugs Market. As new treatments are developed and existing therapies are refined, ongoing clinical trials and research studies continuously contribute to the body of evidence demonstrating the effectiveness and safety of these medications. This evidence is crucial for informing clinical practice and influencing treatment decisions, thereby driving market growth. In Japan, the use of PCSK9 inhibitors is covered under the national health insurance system. However, to optimize medical economics, it is crucial to identify which patients will benefit the most from these treatments. To ensure that these drugs are used appropriately and reach those who need them most, the Japan Atherosclerosis Society has developed guidelines based on the "Japan Atherosclerosis Society (JAS) Guidelines for the Diagnosis and Prevention of Atherosclerotic Cardiovascular Diseases 2017." This statement is the result of the JAS Working Group on the Appropriate Use of PCSK9 Inhibitors.

One of the primary ways in which clinical evidence impacts the market is by validating the efficacy of lipid-lowering drugs. Research studies and clinical trials provide detailed data on how well these medications perform in reducing cholesterol levels and managing other lipid abnormalities. For example, statins, which are among the most widely prescribed lipid-lowering drugs, have been extensively studied in clinical trials. These studies have consistently shown that statins effectively lower low-density lipoprotein (LDL) cholesterol and reduce the risk of cardiovascular events, such as heart attacks and strokes. The robustness of this evidence supports the continued use of statins and reinforces their position as a cornerstone of lipid-lowering therapy. Similarly, clinical trials evaluating newer lipid-lowering drugs, such as PCSK9 inhibitors and newer formulations of niacin, contribute to the evolving landscape of lipid management. Positive outcomes from these studies, including significant reductions in LDL cholesterol levels and improvements in cardiovascular outcomes, bolster confidence in these therapies. For instance, PCSK9 inhibitors have demonstrated substantial LDL cholesterol reductions in various trials, leading to their growing adoption in clinical practice. As the evidence base for these and other emerging therapies strengthens, healthcare providers are more likely to prescribe them, driving demand and market growth.

Key Market Challenges

Regulatory and Reimbursement Hurdles

Navigating the regulatory and reimbursement landscape presents a significant challenge for the Japan Lipid Lowering Drugs Market. The regulatory process in Japan is rigorous, with stringent requirements for clinical trials and evidence of efficacy and safety. Pharmaceutical companies must adhere to specific guidelines set by the Japanese Ministry of Health, Labour and Welfare

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(MHLW) to obtain market approval. The reimbursement process can be complex and time-consuming. Drug pricing and reimbursement decisions by the National Health Insurance (NHI) system can impact the market access of new lipid-lowering therapies. Companies must negotiate with regulatory bodies and insurers to ensure that their products are approved and reimbursed at favorable rates. These hurdles can delay market entry and affect the overall profitability and market dynamics for lipid-lowering drugs.

High Competition and Market Saturation

The Japan Lipid Lowering Drugs Market is highly competitive, with a significant number of established and emerging players. The market includes well-known statins, newer agents like PCSK9 inhibitors, and combination therapies. This high level of competition creates challenges for companies trying to differentiate their products and capture market share. Market saturation, especially with generic versions of traditional statins, intensifies the competition, leading to price wars and reduced profit margins. To remain competitive, companies must invest heavily in marketing, research and development, and differentiation strategies. The challenge lies in distinguishing their products in a crowded market while managing costs and maintaining profitability amidst intense competition.

Patient Adherence and Compliance Issues

Patient adherence and compliance with lipid-lowering therapies are critical challenges in the Japan market. Many patients struggle with long-term adherence to prescribed regimens, which can be attributed to factors such as the complexity of medication schedules, side effects, and a lack of understanding of the importance of consistent therapy. Non-adherence can lead to suboptimal treatment outcomes and a higher incidence of cardiovascular events, which impacts overall market effectiveness. Addressing adherence issues requires comprehensive patient education, support programs, and the development of user-friendly drug formulations. Pharmaceutical companies need to focus on improving patient engagement and compliance to enhance the effectiveness of their therapies and ensure sustained market growth.

Key Market Trends

Advancements in Drug Development and Innovation

Ongoing advancements in pharmaceutical research and drug development are crucial in shaping the Japan Lipid Lowering Drugs Market, driving significant growth and innovation. One major development is the emergence of new drug classes, such as PCSK9 inhibitors. These drugs, including evolocumab and alirocumab, represent a significant breakthrough by targeting the PCSK9 protein, which regulates LDL cholesterol levels. By inhibiting PCSK9, these therapies enhance the removal of LDL cholesterol from the bloodstream, providing substantial reductions in cholesterol levels, often surpassing those achieved with traditional statins. This innovation addresses the need for more effective treatments, particularly for patients who do not achieve adequate control with conventional therapies. Novel statins and improved formulations have further advanced the market. Next-generation statins offer enhanced efficacy and safety, addressing various patient needs and expanding treatment options. Combination therapies that integrate multiple mechanisms of action also play a key role. These therapies combine different approaches to manage cholesterol levels more effectively, offering a tailored treatment experience and addressing diverse patient requirements. The continuous development of these cutting-edge therapies drives market growth by improving treatment outcomes and expanding the range of available options for managing hyperlipidemia and reducing cardiovascular risk. As pharmaceutical research progresses, the introduction of innovative lipid-lowering drugs contributes to a more dynamic and effective market, ultimately benefiting patients and healthcare providers in Japan.

Expansion of Drug Accessibility and Availability

The expansion of drug accessibility and availability in Japan is a critical factor driving the growth of the Japan Lipid Lowering Drugs Market. One major aspect of this expansion is the introduction of generic alternatives for established lipid-lowering medications. Generic drugs provide a cost-effective option for patients, significantly lowering the financial burden associated with brand-name drugs. The availability of generics not only enhances patient access to necessary treatments but also stimulates market competition, potentially leading to lower prices and increased affordability. This is particularly important in Japan, where cost considerations play a significant role in healthcare decisions. In addition to generics, advancements in distribution networks have further improved drug accessibility. Enhanced logistics and supply chain management ensure that lipid-lowering drugs are available across a wide range of healthcare settings, from urban hospitals to rural clinics. This widespread distribution is essential for reaching patients who may otherwise have limited access to these medications, thereby increasing the overall adoption rate.

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New drug formulations and delivery systems also contribute to market growth by addressing patient needs and preferences. Extended-release formulations, for example, allow for once-daily dosing, which improves patient adherence by reducing the frequency of medication intake. This convenience can lead to better management of cholesterol levels and reduced cardiovascular risk. Similarly, combination therapies that integrate multiple lipid-lowering agents into a single pill simplify treatment regimens and enhance patient compliance. These innovations not only improve the effectiveness of treatment but also make it easier for patients to stick to their prescribed therapy. The development of novel delivery systems, such as injectable or oral options with improved pharmacokinetics, further supports patient adherence and market expansion. These systems are designed to enhance the bioavailability and efficacy of the drugs, making them more effective in lowering cholesterol levels and reducing cardiovascular risk. As these advanced formulations become more widely available, they contribute to the broader adoption of lipid-lowering therapies.

Segmental Insights

Drug Insights

Based on the Drug, statins and combination therapies hold a dominant position. Statins, which include widely recognized medications such as atorvastatin, rosuvastatin, and simvastatin, have long been the cornerstone of lipid-lowering therapy due to their proven efficacy in reducing low-density lipoprotein cholesterol (LDL-C) levels and lowering cardiovascular risk. These drugs work by inhibiting HMG-CoA reductase, an enzyme crucial for cholesterol synthesis in the liver, leading to decreased LDL-C levels in the blood. The dominance of statins in Japan's market is supported by extensive clinical evidence demonstrating their benefits in preventing cardiovascular events such as heart attacks and strokes. Statins have been extensively studied and are recommended as first-line therapy for patients with hyperlipidemia and those at high risk of cardiovascular disease. Their well-established safety profile and effectiveness make them a preferred choice among healthcare providers. Statins are available in various formulations and dosages, allowing for tailored treatment based on individual patient needs.

Combination therapies, which involve pairing statins with other lipid-lowering agents, also play a significant role in the market. These combinations are often prescribed to patients who require additional LDL-C reduction beyond what statins alone can achieve. For example, statin-combination therapies that include ezetimibe, a cholesterol absorption inhibitor, or niacin, a vitamin with lipid-modulating properties, are utilized to enhance lipid-lowering effects and manage complex cases of dyslipidemia. The synergistic action of these combinations provides more comprehensive lipid control, which is particularly beneficial for patients with refractory hyperlipidemia or those with a high risk of cardiovascular events. While statins and combination therapies are dominant, other lipid-lowering drug classes such as PCSK9 inhibitors, bile acid sequestrants, fibrates, and cholesterol absorption inhibitors also contribute to the market. PCSK9 inhibitors, like alirocumab and evolocumab, have gained attention for their ability to further reduce LDL-C levels by inhibiting the PCSK9 protein, which otherwise degrades LDL receptors in the liver. Though newer and more expensive compared to statins, PCSK9 inhibitors are increasingly used in patients with familial hypercholesterolemia or those who are statin-intolerant.

Indication Insights

Based on Indication, hypercholesterolemia is the dominant condition driving the demand for lipid-lowering medications. Hypercholesterolemia, characterized by elevated levels of cholesterol in the blood, is a significant risk factor for cardiovascular diseases (CVDs), including coronary artery disease (CAD). The prevalence of hypercholesterolemia in Japan, coupled with its strong association with cardiovascular events, underpins the extensive use of lipid-lowering drugs aimed at managing cholesterol levels.

The focus on hypercholesterolemia stems from its direct link to atherosclerosis, a condition where cholesterol deposits build up in the arterial walls, leading to the narrowing and hardening of arteries. This process increases the risk of heart attacks, strokes, and other cardiovascular complications. Given the high burden of CVDs in Japan, there is a critical need for effective treatments to lower cholesterol levels and mitigate these risks. Statins, which are the primary class of drugs used to manage hypercholesterolemia, dominate the market due to their proven efficacy in reducing low-density lipoprotein cholesterol (LDL-C) levels, the main type of cholesterol implicated in atherosclerosis. In contrast, while coronary artery disease (CAD) and high triglycerides are also important conditions that affect lipid management, they do not drive the market to the same extent as hypercholesterolemia. CAD, which results from the accumulation of cholesterol plaques in the coronary arteries, is a complication of untreated or poorly managed hypercholesterolemia. The treatment strategies for CAD often overlap with those for

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hypercholesterolemia, focusing on lowering cholesterol levels to prevent disease progression and manage existing conditions.

Regional Insights

In the Japan Lipid Lowering Drugs Market, the Kanto region stands out as the dominated area. The Kanto region, which includes major metropolitan areas such as Tokyo and Yokohama, is the economic and healthcare hub of Japan. This region's dominance in the Japan Lipid Lowering Drugs Market is primarily attributed to its large population, high healthcare infrastructure, and advanced medical facilities. Tokyo, as the capital city, is a focal point for medical research, pharmaceutical companies, and healthcare services. The presence of numerous hospitals, research institutions, and pharmaceutical companies in Tokyo drives both the supply and demand for lipid-lowering drugs. The city's extensive healthcare network supports a high volume of patient care, including the management of hypercholesterolemia and cardiovascular diseases, which are primary drivers for the use of lipid-lowering medications.

The Kanto region benefits from a dense population with a significant proportion of elderly individuals, who are at a higher risk for hyperlipidemia and related conditions. The aging demographic contributes to a higher prevalence of cardiovascular diseases, thereby increasing the demand for lipid-lowering treatments. The high incidence of lifestyle-related risk factors, such as obesity and sedentary behavior, further amplifies the need for effective lipid management strategies in this region. In addition to its large patient population, the Kanto region is home to major pharmaceutical companies and research institutions that play a crucial role in advancing the development and availability of lipid-lowering drugs. These institutions conduct extensive clinical trials, develop new drug formulations, and contribute to the rapid adoption of innovative therapies. The presence of such industry players facilitates the introduction of the latest lipid-lowering drugs to the market, driving growth in the region.

Key Market Players

□□Novartis Pharma K.K.

□□AbbVie GK

□□Janssen Pharmaceuticals K.K.

□□Asahi Kasei Pharma Corporation

□□Sun Pharma Japan Limited

□□Kyowa Pharmaceutical Industry Co., Ltd.

□□Santen Pharmaceutical Co., Ltd.

□□Otsuka Pharmaceutical Co., Ltd.

□□Senju Pharmaceutical Co., Ltd.

□□Taisho Pharmaceutical Co., Ltd.

Report Scope:

In this report, the Japan Lipid Lowering Drugs Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

□□Japan Lipid Lowering Drugs Market, By Drug:

- o Statins & Combination
- o PCSK9 Inhibitors
- o Bile Acid Sequestrants
- o Fibrates
- o Cholesterol Absorption Inhibitors
- o Others

□□Japan Lipid Lowering Drugs Market, By Indication:

- o Hypercholesterolemia
- o Coronary Artery Disease
- o High Triglycerides

□□Japan Lipid Lowering Drugs Market, By Distribution Channel:

- o Retail Pharmacies
- o Hospital Pharmacies
- o Online Pharmacies

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☐☐Japan Lipid Lowering Drugs Market, By Region:

- o Hokkaido
- o Tohoku
- o Kanto
- o Chubu
- o Kansai
- o Chugoku
- o Shikoku
- o Kyushu

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Japan Lipid Lowering Drugs Market.

Available Customizations:

Japan Lipid Lowering Drugs Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

☐☐Detailed analysis and profiling of additional market players (up to five).

Table of Contents:

1. Product Overview
 - 1.1. Market Definition
 - 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations
2. Research Methodology
 - 2.1. Objective of the Study
 - 2.2. Baseline Methodology
 - 2.3. Key Industry Partners
 - 2.4. Major Association and Secondary Sources
 - 2.5. Forecasting Methodology
 - 2.6. Data Triangulation & Validations
 - 2.7. Assumptions and Limitations
3. Executive Summary
 - 3.1. Overview of the Market
 - 3.2. Overview of Key Market Segmentations
 - 3.3. Overview of Key Market Players
 - 3.4. Overview of Key Regions/Countries
 - 3.5. Overview of Market Drivers, Challenges, Trends
4. Voice of Customer
5. Japan Lipid Lowering Drugs Market Outlook
 - 5.1. Market Size & Forecast
 - 5.1.1. By Value
 - 5.2. Market Share & Forecast
 - 5.2.1. By Drug (Statins & Combination, PCSK9 Inhibitors, Bile Acid Sequestrants, Fibrates, Cholesterol Absorption Inhibitors, Others)
 - 5.2.2. By Indication (Hypercholesterolemia, Coronary Artery Disease, High Triglycerides)
 - 5.2.3. By Distribution Channel (Retail Pharmacies, Hospital Pharmacies, Online Pharmacies)

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- 5.2.4. By Region
- 5.2.5. By Company (2024)
- 5.3. Market Map
- 6. Hokkaido Lipid Lowering Drugs Market Outlook
 - 6.1. Market Size & Forecast
 - 6.1.1. By Value
 - 6.2. Market Share & Forecast
 - 6.2.1. By Drug
 - 6.2.2. By Indication
 - 6.2.3. By Distribution Channel
- 7. Tohoku Lipid Lowering Drugs Market Outlook
 - 7.1. Market Size & Forecast
 - 7.1.1. By Value
 - 7.2. Market Share & Forecast
 - 7.2.1. By Drug
 - 7.2.2. By Indication
 - 7.2.3. By Distribution Channel
- 8. Kanto Lipid Lowering Drugs Market Outlook
 - 8.1. Market Size & Forecast
 - 8.1.1. By Value
 - 8.2. Market Share & Forecast
 - 8.2.1. By Drug
 - 8.2.2. By Indication
 - 8.2.3. By Distribution Channel
- 9. Chubu Lipid Lowering Drugs Market Outlook
 - 9.1. Market Size & Forecast
 - 9.1.1. By Value
 - 9.2. Market Share & Forecast
 - 9.2.1. By Drug
 - 9.2.2. By Indication
 - 9.2.3. By Distribution Channel
- 10. Kansai Lipid Lowering Drugs Market Outlook
 - 10.1. Market Size & Forecast
 - 10.1.1. By Value
 - 10.2. Market Share & Forecast
 - 10.2.1. By Drug
 - 10.2.2. By Indication
 - 10.2.3. By Distribution Channel
- 11. Chugoku Lipid Lowering Drugs Market Outlook
 - 11.1. Market Size & Forecast
 - 11.1.1. By Value
 - 11.2. Market Share & Forecast
 - 11.2.1. By Drug
 - 11.2.2. By Indication
 - 11.2.3. By Distribution Channel
- 12. Shikoku Lipid Lowering Drugs Market Outlook
 - 12.1. Market Size & Forecast

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- 12.1.1. By Value
- 12.2. Market Share & Forecast
 - 12.2.1. By Drug
 - 12.2.2. By Indication
 - 12.2.3. By Distribution Channel
- 13. Kyushu Lipid Lowering Drugs Market Outlook
 - 13.1. Market Size & Forecast
 - 13.1.1. By Value
 - 13.2. Market Share & Forecast
 - 13.2.1. By Drug
 - 13.2.2. By Indication
 - 13.2.3. By Distribution Channel
- 14. Market Dynamics
 - 14.1. Drivers
 - 14.2. Challenges
- 15. Market Trends & Developments
 - 15.1. Merger & Acquisition (If Any)
 - 15.2. Product Launches (If Any)
 - 15.3. Recent Developments
- 16. Japan Lipid Lowering Drugs Market: SWOT Analysis
- 17. Porter's Five Forces Analysis
 - 17.1. Competition in the Industry
 - 17.2. Potential of New Entrants
 - 17.3. Power of Suppliers
 - 17.4. Power of Customers
 - 17.5. Threat of Substitute Products
- 18. Competitive Landscape
 - 18.1. Novartis Pharma K.K.
 - 18.1.1. Business Overview
 - 18.1.2. Company Snapshot
 - 18.1.3. Products & Services
 - 18.1.4. Financials (As Reported)
 - 18.1.5. Recent Developments
 - 18.1.6. Key Personnel Details
 - 18.1.7. SWOT Analysis
 - 18.2. AbbVie GK
 - 18.3. Janssen Pharmaceuticals K.K.
 - 18.4. Asahi Kasei Pharma Corporation
 - 18.5. Sun Pharma Japan Limited
 - 18.6. Kyowa Pharmaceutical Industry Co., Ltd.
 - 18.7. Santen Pharmaceutical Co., Ltd.
 - 18.8. Otsuka Pharmaceutical Co., Ltd.
 - 18.9. Senju Pharmaceutical Co., Ltd.
 - 18.10. Taisho Pharmaceutical Co., Ltd.
- 19. Strategic Recommendations
- 20. About Us & Disclaimer

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