

Focus on the Eye: Toward the Next Growth Phase

Shigeo Taniuchi

President and COO

Santen Pharmaceutical Co., Ltd.

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Specialized Ophthalmology Company with a History of 130 Years

- Established in 1890
- Headquarters in Osaka, Japan
- Total sales \$2.1 billion in FY2018*



> **60**

Distribution Region

3

Plants

4,000

Employees

30%

Overseas Sales

*US\$1=JPY110.99

Santen's Values

天機に参与する

*Tenki ni sanyo suru*¹

¹ “ Exploring the secrets and mechanisms of nature in order to contribute to people's health”

Santen's original interpretation of a passage from chapter 22 of *Zhongyong (The Doctrine of the Mean)* by Confucius.

**We think carefully about what is essential,
decide clearly what we should do, and act quickly.**

Focus on the Eye: Toward the Next Growth Phase

1

Eyes are an important organ

2

Growth in our business

3

New business domains



Eyes: An Important Organ Vital to Everyday Life

Expression

Daily life



Sports



“Vision plays a critical role in every facet and stage of life”

Education



Work



Source: WHO World report on vision

Globally, the Number of People with Vision Impairments is Increasing

Visually Impaired People



2.2 billion



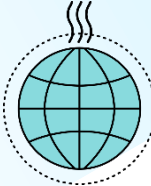
Global population growth



Aging



Lifestyle change



Environmental issues

Source: WHO World report on vision

Focus on the Eye: Toward the Next Growth Phase

1

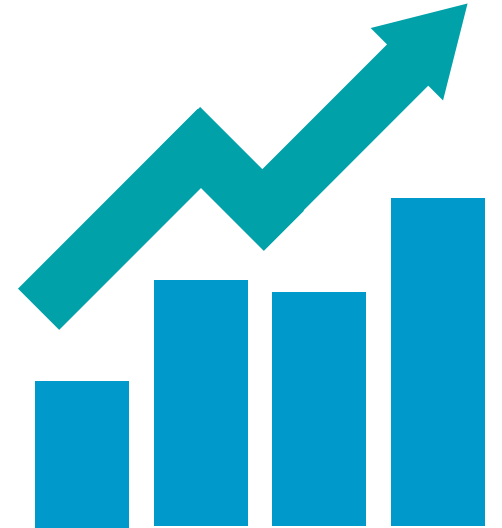
Eyes are an important organ

2

Growth in our business

3

New business domains



US: Aiming for Growth with Differentiated Products



- Differentiated pipeline / products
- Tailored strategy for entering the US
- Realizing profitability and growth

GLAUKOS®



Building on Strengths in Japan and EMEA*

- High market share and know-how
- Manufacturing, quality assurance capability

Japan

**Sustainable
growth**

- **Global Influencer**
 - Academia and KOLs
 - Regulatory expertise
- **Market presence**

EMEA

* Europe, the Middle East and Africa

Japan: Extension of *Eylea** Sales Contract and Launch of *Alesion LX*



**Strong
business
base**

Alesion LX

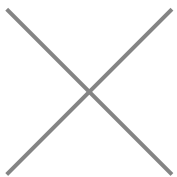


*Eylea: Co-promoted product of Bayer Yakuhin, Ltd. (MAH)

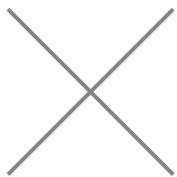
China / Asia: Unlocking Potential for Further Growth



**4 Billion
Population**



**Aging
Population**



**Improving
Diagnosis
and Access**

Source: UN World Population Prospects 2019

Establishment of a Second Plant in Suzhou, China to Meet Demand from Increase in Patients



Our Suzhou First Plant in China



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Growth in our business

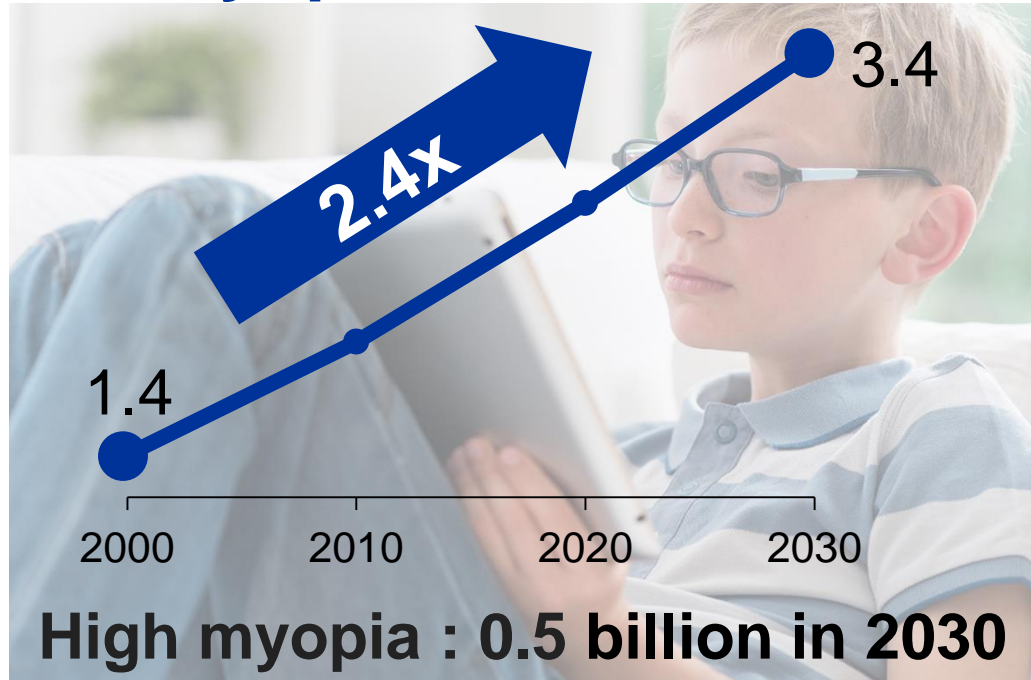
3

New business domains



Tackling Unmet Needs: Myopia

Myopia Patients (billions)



Vision
loss

Economic loss

**DE-127:
Low dose atropine**

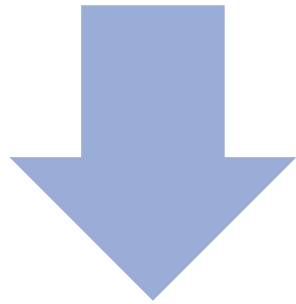


**Phase 2 trial met
primary endpoint**

Source: WHO World report on vision

Tackling Unmet Needs: Ophthalmic Rare Diseases

Inherited retinal diseases, etc.



Vision loss / blindness

Gene Therapy

Santen



Source: US National Library of Medicine National Institutes of Health
Translational Vision & Science Technology <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC6052953/>

Partnership with ITU

To support ITU and WHO for “Be He@lthy, Be Mobile”

**Raise awareness of the
prevention and management
of non-communicable diseases**



**BE
HE@LTHY
BE
MOBILE**

MOBILE TECHNOLOGY FOR A HEALTHY LIFE

ITU: International Telecommunication Union (a specialized agency of the United Nations)
WHO: World Health Organization

Focus on the Eye: Toward the Next Growth Phase

- Increase in ophthalmic patients
- Aim to resolve issues in the ophthalmology field
- Taking on the challenge of new fields



The logo for Santen features a stylized 'S' in a light blue color, followed by the word 'Santen' in a bold, dark blue sans-serif font.

A Clear Vision For Life™