

# EU-Japan Centre

for Industrial Cooperation

## Biotech Business Mission in Japan 6-10 October 2025

*Pre-departure briefing  
19 September 2025*



**EU-Japan Centre**  
for Industrial Cooperation  
一般財団法人日欧産業協力センター

# Outline

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- 1) Intro
- 2) Biotech & Pharma Sector in Japan
- 3) Intercultural Aspects
- 4) Mission Update

# Mission Briefing

## 1. Staff in charge of the mission



**Diane LULA (Ms.)** Europe Office, Belgium

Mission Manager; recruitment, follow-up

French, English, Dutch



**Masae OZAWA (Ms.)** Head Office, Japan

Consultant; coordination +on-site support

Japanese, English



**Noriko MITA (Ms.)** Head Office, Japan

Manager; logistics +on-site support

Japanese, English



**Daniel GRALKI (Mr.)** Head Office, Japan

Consultant; coordination +on-site support

German, English, Japanese, French

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## The Biotech & Pharma Sector in Japan

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# Overview

## The world's 3<sup>rd</sup> largest market

Japan is the **third largest pharmaceutical market in the world**, and biopharmaceuticals are considered to be the driving force behind innovation in this industry.

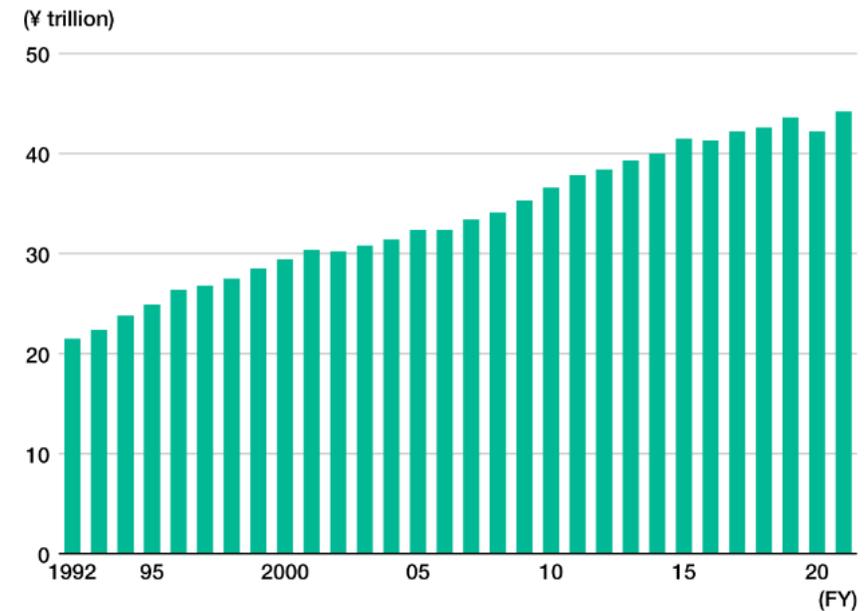
**Aging population:** with one the world's highest proportions of the elderly (nearly 30%) with a high ratio of cancer, dementia and other diseases

There are continued demands for innovative therapies and **foreign companies are important players in the biopharmaceutical market**

**Japan benefits from a stable regulatory environment and pharmaceutical safety regime**



## Estimated Healthcare Expenditures



Created by *Nippon.com* based on the Ministry of Health, Labor, and Welfare's Healthcare Expenditure Trends report.

nippon.com



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# Overview

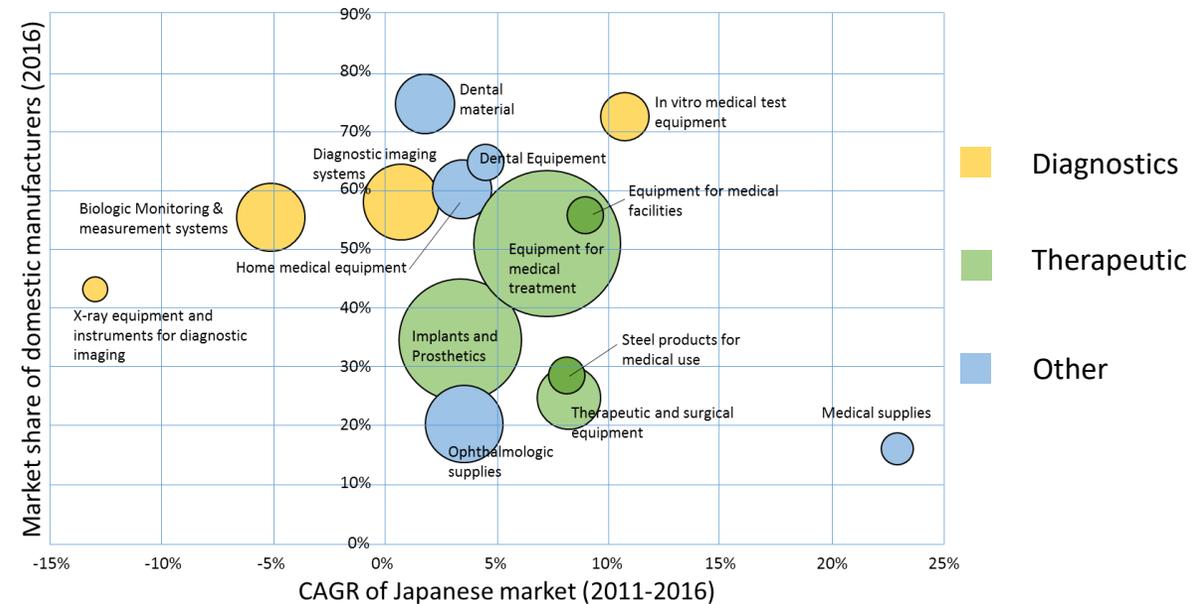
## Pharmaceuticals

**Pharmaceuticals:** more than 70% of domestically licensed biopharmaceuticals were from foreign companies.



## Medical Equipment

**Medical equipment:** Imports comprise more than 50% of the market.



Source: Japan Federation of Medical Devices Associations (JFMDA)

# Overview

## Excellent research

### 4 Japanese Nobel Prize awards for researchers between 2012 and 2018

- ❑ “The discovery that mature cells can be reprogrammed to become pluripotent”  
(Prof. Yamanaka)
- ❑ “The discovery of cancer therapy by inhibition of negative immune regulation”  
(Prof. Honjo)

giving a boost to further investments and strategies in advanced medicine research

➔ Regenerative Medicine based on induced pluripotent stem cells (iPS cells)

➔ Cancer immunotherapies such as Opdivo

# Overview

## Regulatory and institutional hurdles

**Approval:** PMDA/ MHLW requires Japanese study data for approval in Japan

**Mutual recognition** scheme with EU Medical devices product licenses, clinical trial test results barely exists

**Drug pricing:** reform to limit healthcare costs has affected the business climate

**Drug lag/loss:** More than 2/3 of all drugs approved in the US and Europe don't make it into the Japanese market Japan failed to develop "its own" COVID vaccine during the recent pandemic

**Human resources:** Lack of qualified personnel

# Policies

## Japanese Bioeconomy strategy

- Becoming the world's most advanced economy society by 2030

Biomaterials  
Bioplastics  
Biofoundry

### RED BIO / HEALTHCARE

- ❑ Biopharmaceuticals (incl. vaccines) development & production
- ❑ Large-scale genome database
- ❑ Becoming a leading destination for drug discovery

\$295 Bil. (2018) → \$485 Bil.

### WHITE BIO / BIO MANUFACTURING

- ❑ Engineering biology-based bio foundry & biorefinery
- ❑ R&D support for bioplastics

\$240 Bil. (2018) → \$330 Bil.

Biopharmaceuticals  
Regenerative  
medicine, Cell/Gene  
therapy, etc.)

### GREEN BIO / PRIMARY PRODUCTION

- ❑ Automated agriculture
- ❑ latest genome editing technology
- ❑ Large wooden construction

\$7.3 Bil. (2018) → \$25 Bil.

Sustainable &  
smart  
agriculture and  
forestry

# Players

## Japanese Pharma

A slightly shrinking presence in the Global market.

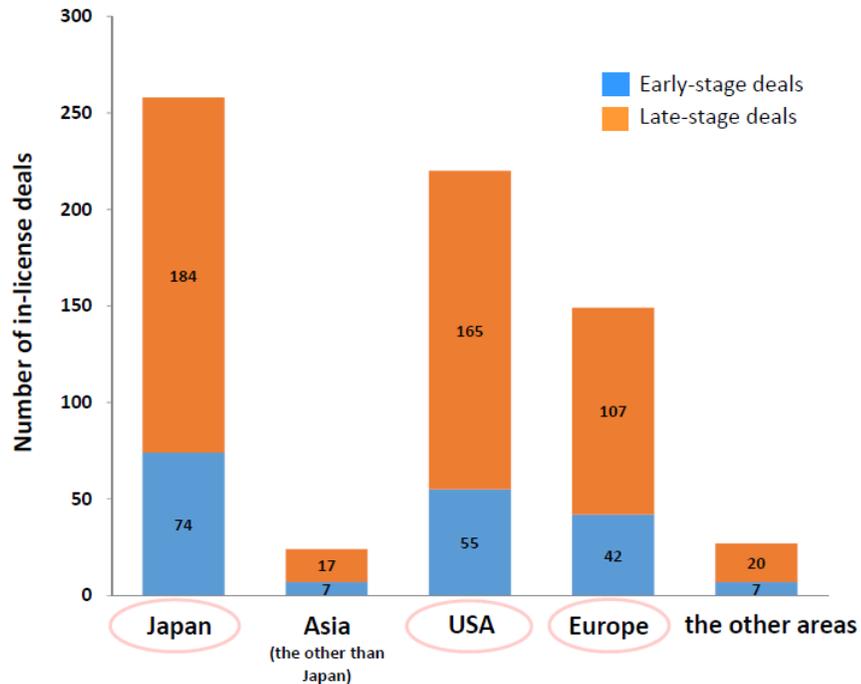
Horizontal division of work between pharma and CROs, CDMOs is continuing.

Cooperation with bioventures is increasing.

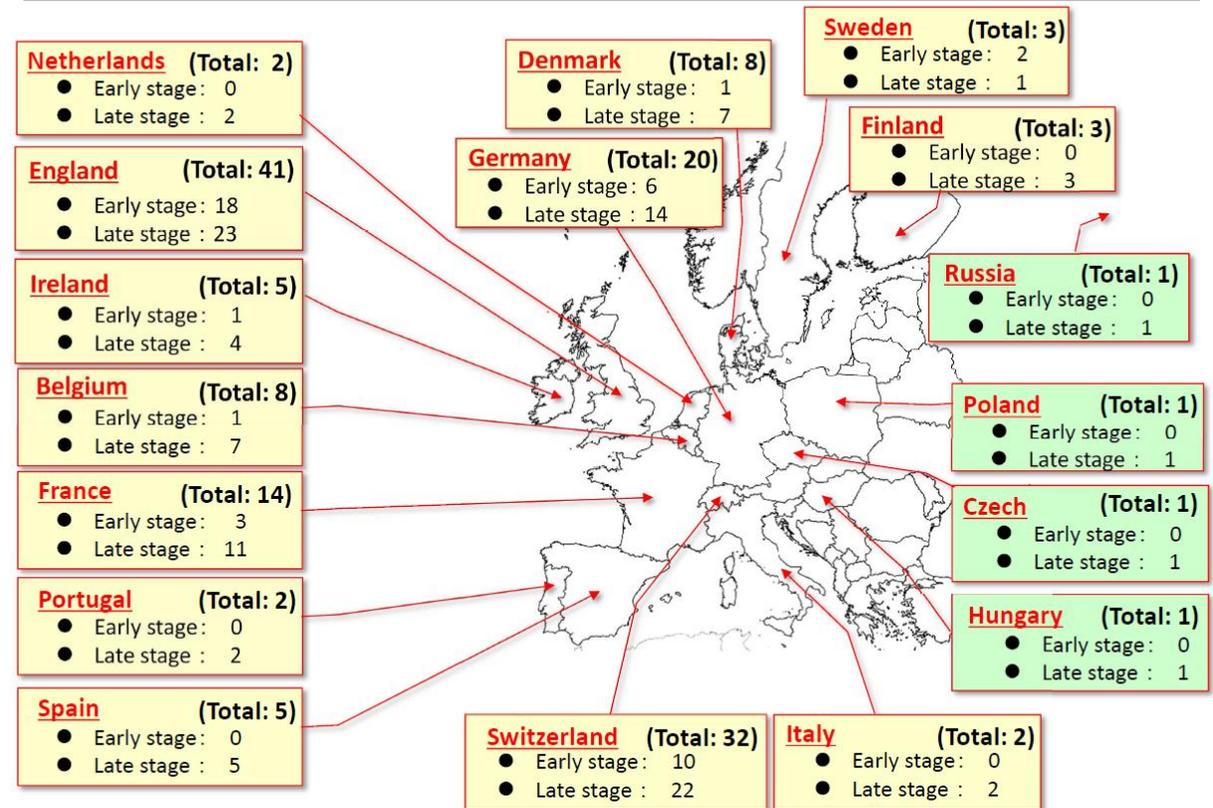
Company name	Turnover in Million JPY	Company name	Turnover in Million JPY	Company name	Turnover in Million JPY
1. Takeda	2,097,224	12. Taisho Pharma	261,551	23. Kyorin Holdings	113,620
2. Astellas	1,306,348	13. Santen Pharma	234,026	24. Mochida Pharma	109,643
3. Otsuka Holdings	1,291,981	14. Meiji Holdings	198,600	25. Towa Pharma	105,104
4. Daiichi-Sankyo	929,717	15. Sawai Pharma	184,341	26. Kaken Pharma	94,165
5. Eisai	642,834	16. Nichi-Iko	166,592	27. Kissei Pharma	72,297
6. Chugai	579,787	17. Teijin (Healthcare)	157,500	28. Torii Pharma	62,551
7. Dainippon Sumitomo	459,267	18. Hisamitsu	143,408	29. Zeria Pharma	61,831
8. Mitsubishi-Tanabe	424,767	19. Asahi Kasei	135,500	30. Suzuken Pharma	47,030
9. Shionogi	363,721	20. Tsumura	120,906	31. Aska Pharma	46,706
10. Kyowa-Hakko Kirin	346,531	21. Nippon Shinyaku	114,716	32. Nippon Kayaku	46,231
11. Ono Pharma	288,634	22. JT Pharma	113,992	33. Fuso Pharma	46,074

# Players

## Japanese Pharma – License deals with Europe



Overview of in-license deals (2008-2017) of Japanese pharmaceutical companies with European countries



## Europe –Japan deals 2008 - 2017

Data: Japan Bioindustry Association (JBA)

# Players

## Clusters and Ecosystems

### Two Global Bio Communities in the Kanto and Kansai regions

- Various programmes to build ecosystems
- support startups
- Encourage academia – company cooperation
- Invite foreign companies to establish a presence and to invest

### Several Regional Biocommunities



Hokkaido

Tsuruoka

Nagaoka

Hiroshima

Fukuoka

Okinawa

BiocK  
Biocommunity Kansai

JBA  
Japan Bioindustry Association  
一般財団法人バイオインダストリー協会

LINK-J  
Life Science Innovation Network Japan

KING SKYFRONT  
Kawasaki Innovation Gateway at SKYFRONT

Greater Tokyo Biocommunity (GTB)

Osaka Prefectural Government  
大阪府

KBIC  
Kobe Biomedical Innovation Cluster

BRI

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Biocommunity Kansai (BiocK)

# Players

## Startups and Bio Ventures

### Growing support for Bio Ventures and Startups

#### Japanese startups database:

[Japanese]

#### Japanese Life Science Startup List

This Japanese Life Science Startup List is edited and managed jointly by Japan Bioindustry Association and NPO Kinki Bio-Industry Development Organization in cooperation with supporting organizations to biocommunities and life science startups of each region in Japan. We aim to promote the creation of business alliance opportunities and help life science startups accelerate their businesses by broadly disseminating information on excellent life science startups in and out of Japan.

##### -Japan Bioindustry Association(JBA):

JBA's membership base spans a wide array of corporations that use applications of biotechnology in areas ranging from pharmaceutical and medical supplies, food and cosmetics, as well as chemicals, information, machinery, construction and energy and natural resources. In addition, JBA counts public organizations, universities, public research institutes and a variety of individuals as members. [Details are here.](#)



##### -NPO Kinki Bio-Industry Development Organization(KBDO):

KBDO is a non-profit organization that conducts business such as industrialization support, start-up support, promotion of open innovation, and overseas exchanges in order to connect technology seeds in the bio field to commercialization through the cooperation among industry, academia, and government. [Details are here.](#)



JBA and KBDO work as the secretariats of **Greater Tokyo Biocommunity (GTB)** and **Biocommunity Kansai (BiocK)**, respectively and both are certified by Japanese cabinet office as a "Global Bio-community" that leads the world in the bioindustry field. Both organizations will build a strategic value chain involving various actors from research to commercialization and contribute to the development of the bioindustry.

Company Name	<input type="text"/>
Field / Business	<input type="checkbox"/> Pharmaceutical/Drug Discovery <input type="checkbox"/> Drug discovery support/Contract service <input type="checkbox"/> Medical care/Diagnosis/Medical equipment/Healthcare <input type="checkbox"/> Functional food <input type="checkbox"/> Agriculture/Forestry/Fisheries/Livestock raising <input type="checkbox"/> Chemical/Cosmetic/Fiber <input type="checkbox"/> Environment/Energy <input type="checkbox"/> Machinery/Manufacturing <input type="checkbox"/> Others <input type="checkbox"/> Consulting

# Strategic interest

- Enhance basic research and bridging functions to create innovative seeds that will lead to next-generation medical technologies and drug discovery
- Develop domestic manufacturing bases, such as CDMOs, and secure manufacturing human resources in the field, including from security viewpoints.
- Fuse biotechnology and digital technologies together, build databases to further accelerate digital transformation of research, develop integrated search technologies, etc. using AI, and develop bio-informatics human resources.
- • Support pharmaceutical startups by enhancing the connectivity between ecosystems in Japan and abroad

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## Intercultural Aspects

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# Intercultural Aspects



## Group vs. Individual



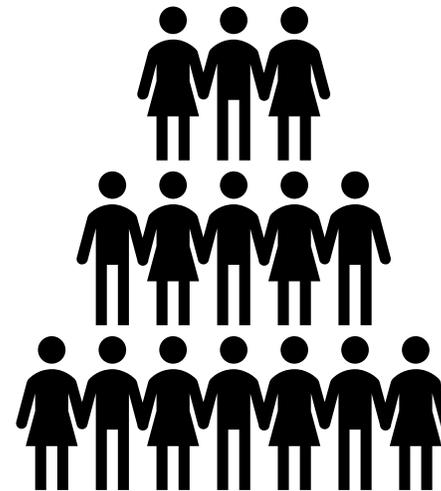
### Between Groups or Between Group or Individual

Uchi (Inside) vs. Soto (Outside)

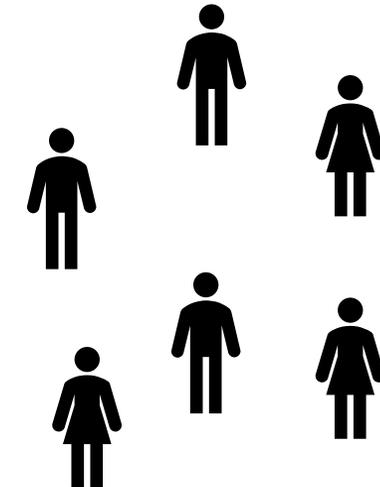
#### Inside Groups

#### Seniority/ Hierarchy

Senpai (Senior) – Kohai (Junior)



Relatively rigid  
sometimes closed



More flexible

Affects: Communication, Joint action, Responsibility, Risk-taking etc.

# Intercultural Aspects



## Communication



### High Context Communication

- Context is important
  - “Reading the air”
- Implicit ambiguous messages
- Reserved inward reactions
- Avoiding open conflict
- Careful acting, “quiet”

### Low Context Communication

- What is said or written is important
- Explicit clear messages
- Visible, external outward reaction
- Embracing (and solving) conflict
- Spontaneous acting, “loud”

# Intercultural Aspects

## Time, Place, Occasion (TPO)

### In Business Context

- “Tatemae”
- Politeness and modesty
- Punctuality
- Formalities, no “surprises”
- Dress code
- Business Cards



### In other (more private) contexts

- “Honne”
- Personal relationships
- Very simple language
- Sometimes brutal honesty

# Intercultural Aspects

## What to do

- Be on time.
- Have business cards with you.
- Listen, ask, check if you have understood
- Don't "brag", only promise what you can deliver
- Emphasise personal partnerships, pay attention to hierarchy / people's networks
- Don't get tired when something takes time.
- When something goes wrong on your end, apologise first. Don't try to explain immediately
- Carefully explain your point of view when you cannot agree.
  - Build trust. Go for a drink.

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## Mission Update

# Mission Briefing

## Overall Schedule

			Wed. 24 Sept. Osaka Online	Thu. 25 Sept. Osaka Online	Fri. 26 Sept. Osaka Online	
Sun. 5 Oct. Kansai Intl. Airport  or  Tokyo ⇒ Osaka Check-in Osaka	Mon. 6 Oct.  EU-Japan Biotech& Pharma Partnering Conference Osaka	Tue. 7 Oct. Check-out Osaka Site Visit in Osaka  Osaka ⇒ Yokohama Check-in Yokohama	Wed. 8 Oct.  Bio Japan Yokohama Bio Japan Reception	Thu. 9 Oct.  Bio Japan Yokohama Bio Japan Partnering Party	Fri. 10 Oct.  Bio Japan Yokohama	Sat. 11 Oct. Check-out Yokohama 

# Mission Briefing

## Osaka Venue

(Shion Hall at 4<sup>th</sup> floor of [Hotel Hankyu International](#) in “Kita” or “Umeda” area close to Osaka Station and Osaka Umeda Station

### Venue Address:

Hotel Hankyu International

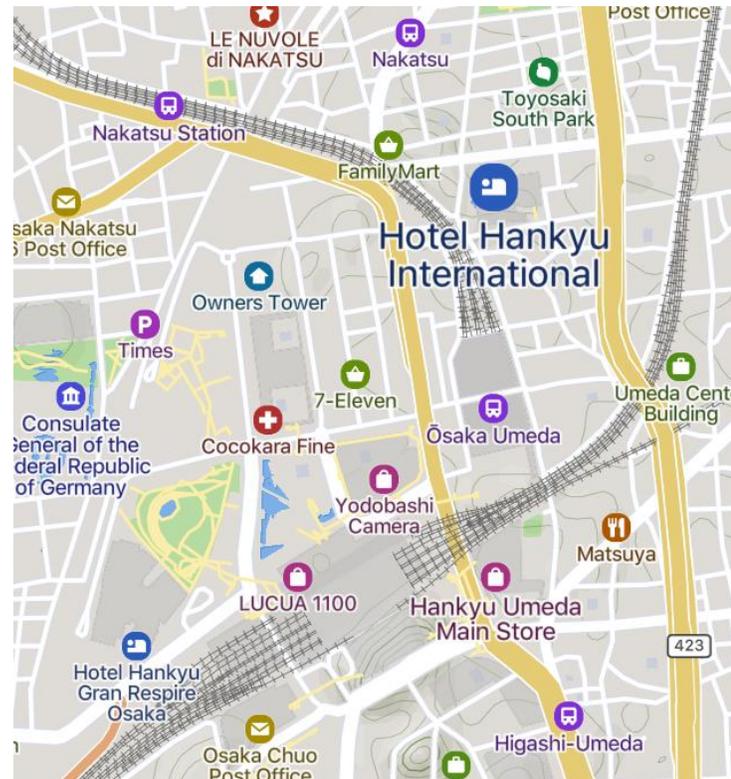


530-0013

19-19 Chayamachi,

Kita-ku, Osaka

Tel: +81-6-6377-2100



### Access:

via train or bus from

[Kansai International Airport](#)

or

[Itami Airport](#)

Via Shinkansen from

[Shin-Osaka station](#)

[Walking map from Osaka station](#)

Cloakroom available in front of Shion Hall on 4th floor

# OSAKA

## Schedule 6 October: Partnering Conference

- **8:30** **Registration (in front of Shion Hall 4<sup>th</sup> floor)**
- **9:00** Opening
- **9:30 – 12:00** Morning meeting session
- **12:10 - 13:20** Luncheon with presentations
- **13:30 - 17:00** Afternoon meeting session
- **17:00-18:00** Policy Seminar / Pannel discussion
- **18:10-19:30** Reception in Zuicho Hall on 6<sup>th</sup> floor buffet and 1 min. short pitches.



The EU Japan Centre will take care of displaying participant's posters at the venue

# OSAKA

## Osaka Partnering (Online 24-26 Sept.. / Onsite 6 Oct.)

1. Make sure any colleagues who join you are registered as well
2. Identify who is remote and who is on-site participant, try to meet “on-site people” in Osaka
3. Be proactive and request meetings not only with large pharma companies)
  - Be on time for meetings, be prepared
  - have plenty of business cards ready for on-site meetings!

Yukihisa Matsunaga  
Foreign Business Development Advisor  
MILAN, ITALY  
Miyuki Yakugyo Co., Ltd. >

Masahide Azuma  
Senior Director  
TOKYO, JAPAN  
xCARE Inc. >

1:1 Meetings

ALL 2 ACCEPTED 1 PENDING 1 CANCELED 1

All times are displayed in the event time zone (Asia/Tokyo, currently 11:59). [Change](#)

Next meetings

DT Daniel T. Test  
Test Organisation

DG Daniel Gralki  
EU-Japan Centre for Industrial C...

14:00 - 14:25  
Monday, October 07

On-site Meeting  
Table 1

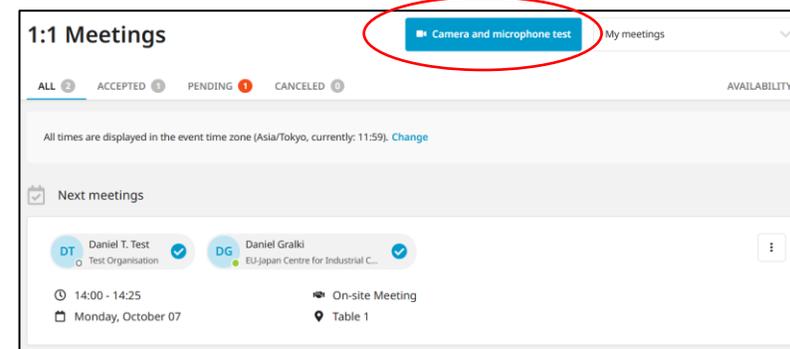
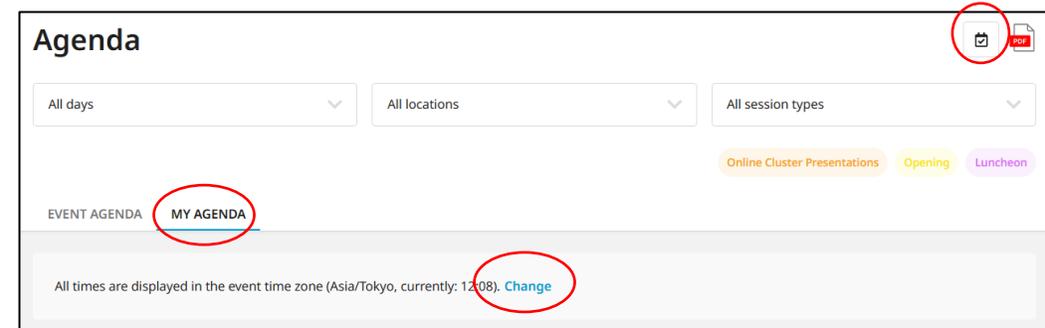
# OSAKA

## Osaka Partnering (Online 24-26 Sept. / Onsite 6 Oct.)

3. Copy Agenda to your calendar, download the b2match app



4. Change time zone in your agenda, depending on whether you manage online meetings or on-site meetings
5. Check your camera and mic settings before the online meetings
6. Print your Pass after notification



# OSAKA

## Schedule 7 October: Site-Visit and travel to Yokohama

- **8:50** Meet at Umekita Green Place Bus Parking Lot on the north side of Osaka station (including all luggage)
- **9:00** Departure by bus
- **9:10** Visit of [Nakanoshima Qross](#) ([CiRA Foundation](#), [PMDA \(Pharmaceuticals and Medical Devices Agency\)](#)).
- **11:10** Visit [KENTO](#), a Health and Biomedical Innovation Town, [National Cerebral and Cardiovascular Center \(NCVC\)](#) and the [The National Institute of Health and Nutrition \(NIHN\)](#)
- **13:00** Arrival at Shin-Osaka station by bus (occasion to buy Lunch boxes)
- **13:39** Departure from Shin-Osaka station by Shinkansen Nozomi No. 386 to Shin-Yokohama (Arrival at 15:47) Travel to Minato-Mirai Area by taxi or local train

8:50 a.m.



MAP



- Check BioJapan venue and get partnering Passes
- Optional visit of [Global Life Science Session](#) in Tokyo

# Bio Japan

## Venue – Pacifico Yokohama



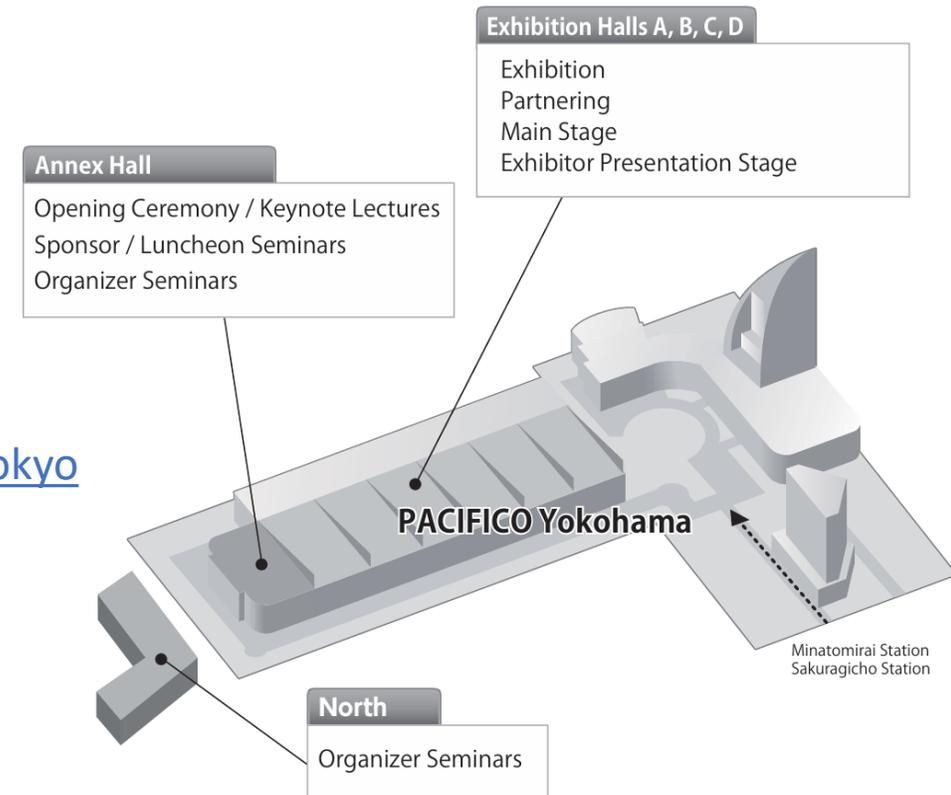
- From Minato Mirai Station: about 5 min. walk
- From JR Sakuragicho Station: about 12 min. walk or 5min. by taxi
- From Shin-Yokohama Station (Shinkansen Station) : JR Yokohama Line to Kikuna. Change to Tokyu Toyoko/Minato Mirai Line in the direction of Motomachi-Chukagai, get off at Minato Mirai Station

# Bio Japan

## Schedule

8 October (Wed) – 10 October (Fri)

- Partnering (8:30-16:55), [Pacifico Yokohama Convention Center](#)
- Exhibition (10:00-17:00), [Pacifico Yokohama Convention Center](#)
- Exhibitor reception on October 8th (Wed.) at [Yokohama Bay Hotel Tokyo](#) and Partnering Party and 9th (Thu.) at [Anniversaire Minatomirai](#) 17:30-19:30 (tbc)
- Seminars in North Halls



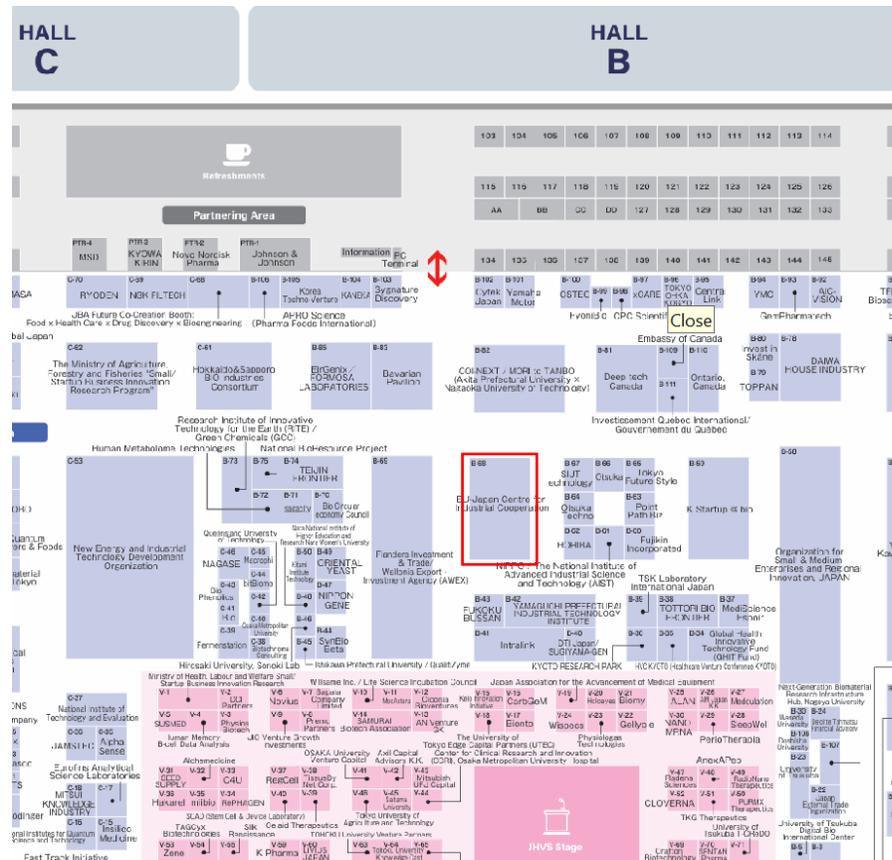
Japan Healthcare  
Venture Summit



# Bio Japan

## EU-Japan Centre Booth – B 68

- Individual poster space,
- Display counter
- 100 V power outlet
- Storage space in the display cabinet
- Business Card box
- Staff and interpreter support
- Partnering Pass for full access
- \* pre- registration for some seminars needed



**Full Layout**



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## Partnering

[Partnering Login](#)

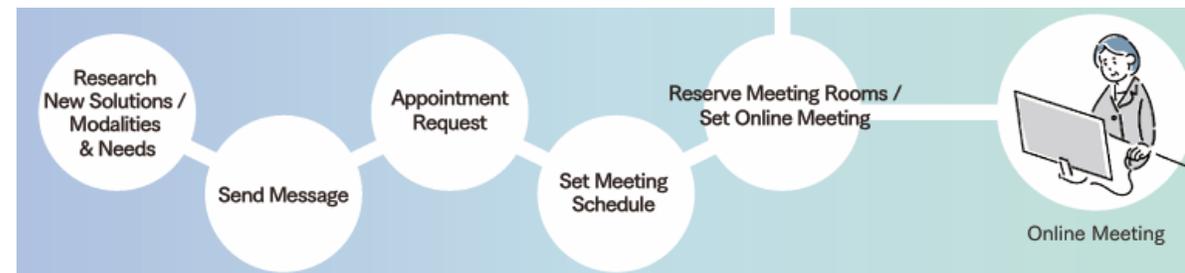
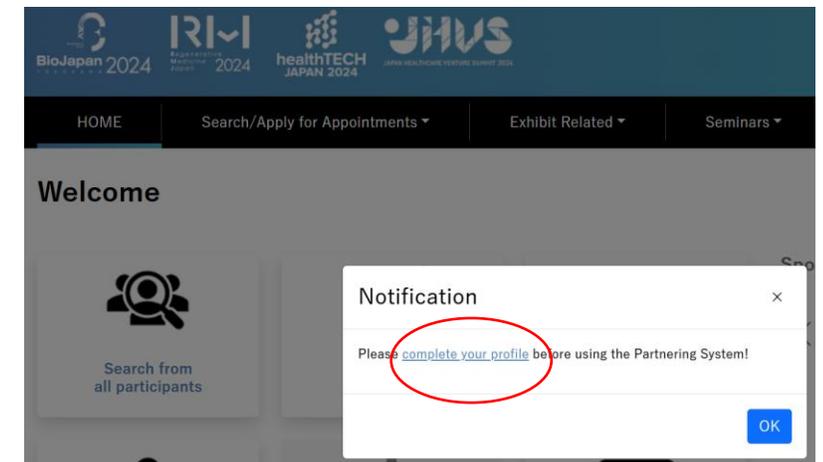
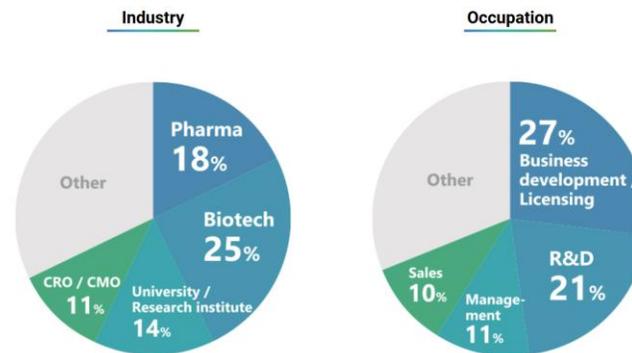
[Partnering System Guide](#)

- Hosted by the BioJapan Organiser

- Basic Profile  
**+ Partnering Profile  
incl. Schedule Settings!**

- Seminar registration

- Colleagues other than Mission participants need to purchase own Partnering access



# After the mission

## Reporting & Follow-up

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- Meeting ratings for Osaka Event
- Meeting record of BioJapan Partnering
- Post-mission questionnaire
- Reimbursement of deposit

EU-Japan Centre staff will contact you periodically after the Event to evaluate the outcome of the Mission in terms of potential partnerships.  
Your success is our success!

# EU-Japan Centre

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## Thank you.

EU-Japan Centre for Industrial Cooperation  
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Daniel Gralki [daniel.gralki@eu-japan.or.jp](mailto:daniel.gralki@eu-japan.or.jp)  
Masae Ozawa [masae.ozawa@eu-japan.or.jp](mailto:masae.ozawa@eu-japan.or.jp)

Website with latest practical info for you:  
<https://www.eu-japan.eu/biotech-clustersme-mission-selected-participants-details>