



2Q FY2011

(Fiscal Year Ending March 31, 2012)

Financial Results Presentation

Eisai Co., Ltd.

November 1, 2011

hhe
human health care

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2Q FY2011 Consolidated Financial Results

Achieved planned profits through transformation of P/L structure



(Billion Yen, %)

	April – September 2010		April – September 2011		
	Results	%	Results	%	YOY
Net Sales	412.3	100.0	331.0	100.0	80
Cost of Sales	84.1	20.4	85.7	25.9	102
Gross Profit	328.2	79.6	245.3	74.1	75
R&D Expenses	73.8	17.9	62.9	19.0	85
SG&A Expenses	187.1	45.4	132.0	39.9	71
Operating Income	67.2	16.3	50.4	15.2	75
Ordinary Income	62.2	15.1	47.3	14.3	76
Net Income	39.9	9.7	33.3	10.1	83
Cash Income	66.7		57.7		86

Cash income is the total amount of cash available for investments for growth, business development, dividend payment, and repayment of borrowings, etc.
 Cash income = Net income + Depreciation of PP&E and Amortization of intangible assets + In-process R&D + Amortization of goodwill + Loss on impairment (including loss on devaluation of investment securities)

2Q FY2011 average exchange rates: U.S.\$ = 79.8 yen (YOY -10.3%), Euro = 113.8 yen (YOY -0.0%), GBP = 129.3 yen (YOY -4.2%)

Sales of Aricept and Pariet/AcipHex

Steady growth in East Asia region



Aricept

(Billion Yen, %)

Pariet/AcipHex

(Billion Yen, %)

	Apr.-Sep. 2010	April – September 2011	
	Results	Results	YOY
East Asia [Japan]	53.6 [50.9]	60.4 [57.6]	113 [113]
U.S. [\$ million]	106.1 [1,192]	7.3 [92] *1	7 [8]
Europe	11.6	12.7	109 [110]
New Markets & ASEAN	0.8	0.9	112
Total	172.1	81.4	47 [48]

	Apr.-Sep. 2010	April – September 2011	
	Results	Results	YOY
East Asia [Japan]	31.8 [29.9]	31.1 [29.7]	98 [99]
U.S. [\$ million]	34.0 [382]	28.5 [358]	84 [94]
Europe	3.7	2.7	74 [74]
New Markets & ASEAN	0.9	1.0	107
Total	70.3	63.3	90 [95]

*1 U.S. includes the sales of Aricept 23mg (\$23M) and the sales of AG (Authorized generic; \$35M)

[] based on local currency

[] based on local currency

- Japan, Europe, New Markets and ASEAN achieved double-digit growth on local currency basis
- Secured approx. 50% of global sales YOY despite Aricept LOE in the U.S.

- Sales in Japan remained on the same level as the previous year even after the launch of generic products
- Maintain No.1 PPI position in GERD market in Japan*2

Sales of Oncology Franchise Products

Acceleration of transformation to oncology franchise



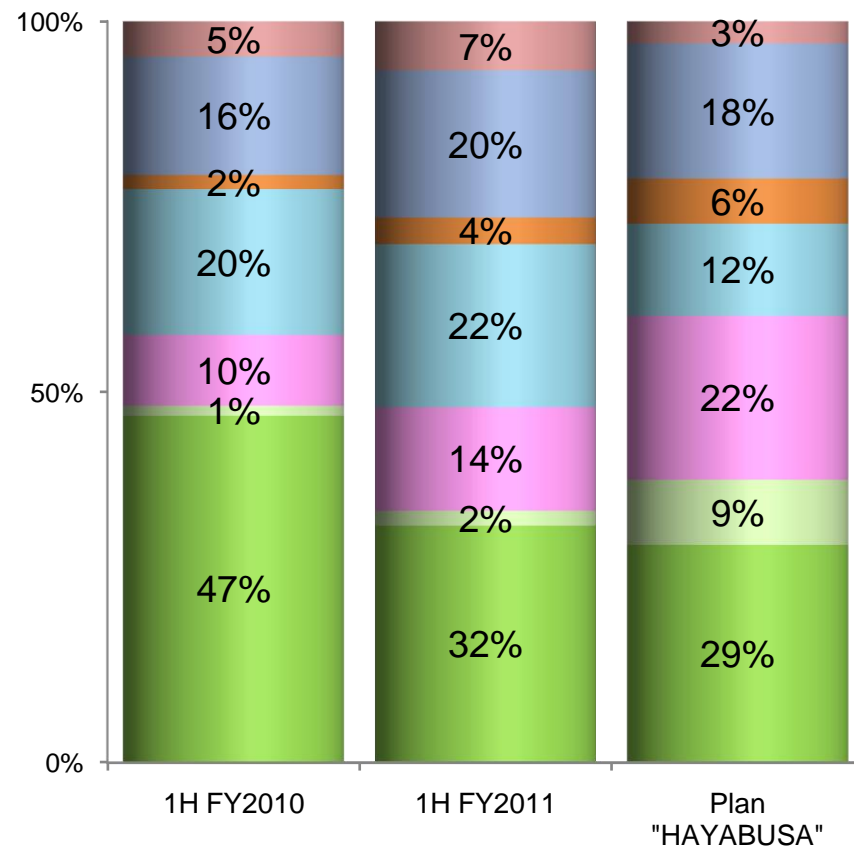
(Billion Yen, %)

	Apr.-Sep. 2010	April-September 2011	
	Results	Results	YOY
Halaven	-	6.2 ^{*1}	-
Symbenda/ Treakisym ^{*2}	-	1.6	-
Aloxi	17.3	18.3	106 [118]
Dacogen	8.4	8.5	101 [113]
Fragmin	8.6	7.3	85 [94]
Others	5.2	4.4	84 [92]
Oncology-related products Total	39.5	46.3	117 [130]

*1 Halaven Sales in the U.S. is \$64M

*2 Symbenda was launched in September 2010 in Singapore; Treakisym was launched in December 2010 in Japan.

- Oncology-related products grew by 30% on a local currency basis, accounting for 14.0% of total sales (9.6% in the same period last year)



- Neuroscience
- Epilepsy
- Oncology
- GI/Liver
- Immunology/Allergy
- Other branded products
- Other businesses

Sales by Segment

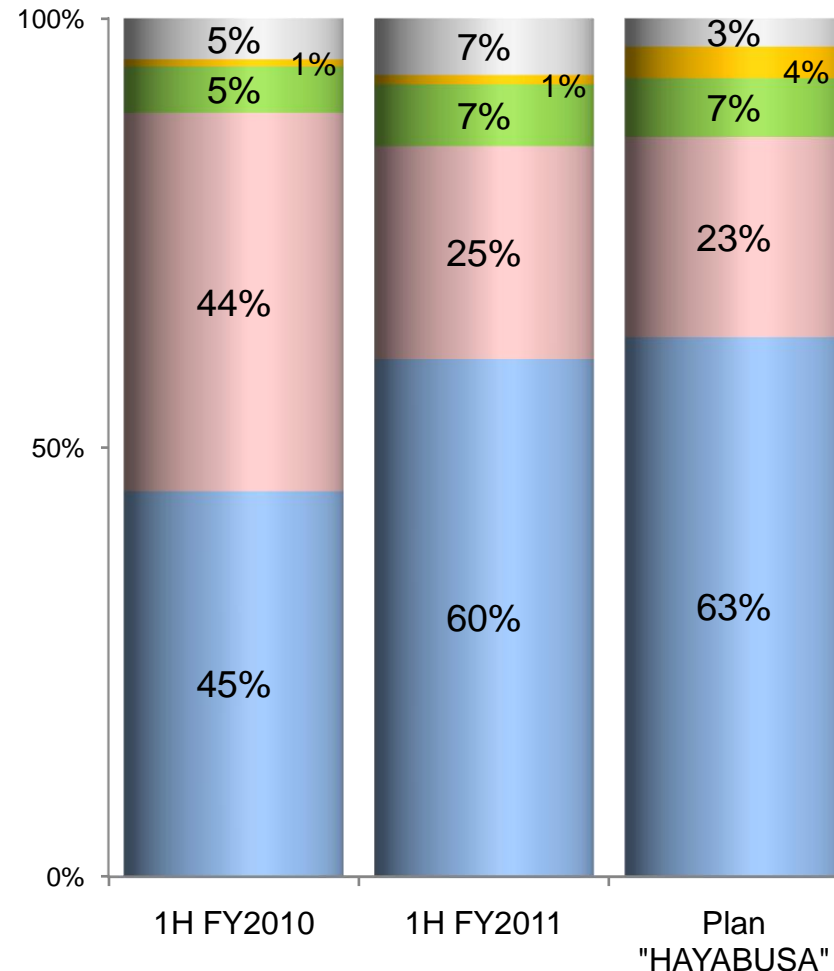


Regional transformation to East Asia progressed

(Billion Yen, %)

	Apr. – Sep. 2010		April – September 2011		
	Sales	%	Sales	%	YOY
East Asia* [Japan]	185.3 [170.9]	44.9 [41.5]	199.6 [185.6]	60.3 [56.1]	108 [109]
U.S.*	181.7	44.1	82.0	24.8	45 [50]
Europe*	22.1	5.4	23.8	7.2	108 [109]
New Markets & ASEAN*	3.5	0.8	3.7	1.1	106 [111]
Reporting Segment Total	392.5	95.2	309.1	93.4	79
Others	19.7	4.8	21.9	6.6	111
Consolidated Sales	412.3	100.0	331.0	100.0	80 [83]

[] based on local currency



■ East Asia ■ U.S. ■ Europe ■ New Markets & ASEAN ■ Others

*Pharmaceuticals Businesses of East Asia, U.S., Europe, and New Markets and ASEAN

Profit by Segment

Rapid growth in East Asia led to secure the same level of reporting segment profit ratio as the previous year



(Billion Yen, %)

	April – September 2010			April – September 2011				
	Results	%	% on Sales	Results	%	% on Sales	YOY	Difference from previous year
East Asia* [Japan]	75.6 [72.3]	52.0 [49.8]	40.8 [42.3]	84.1 [80.9]	71.7 [69.0]	42.2 [43.6]	111 [112]	8.6 [8.6]
U.S.* [\$ million]	57.2 [643]	39.4	31.5	18.3 [229]	15.6	22.3	32 [36]	(38.9) (414)
Europe*	2.8	1.9	12.6	3.9	3.3	16.2	138	1.1
New Markets & ASEAN*	0.6	0.4	17.8	0.5	0.5	14.8	87	(0.1)
Reporting Segment Total	136.2	93.7	34.7	106.9	91.1	34.6	78	(29.3)
Others	9.1	6.3	46.0	10.5	8.9	48.0	116	1.4
R&D expenses & Non-allocated SG&A expenses	(78.1)			(66.9)			86	11.2
Consolidated Operating Profit	67.2		16.3	50.4		15.2	75	(16.7)

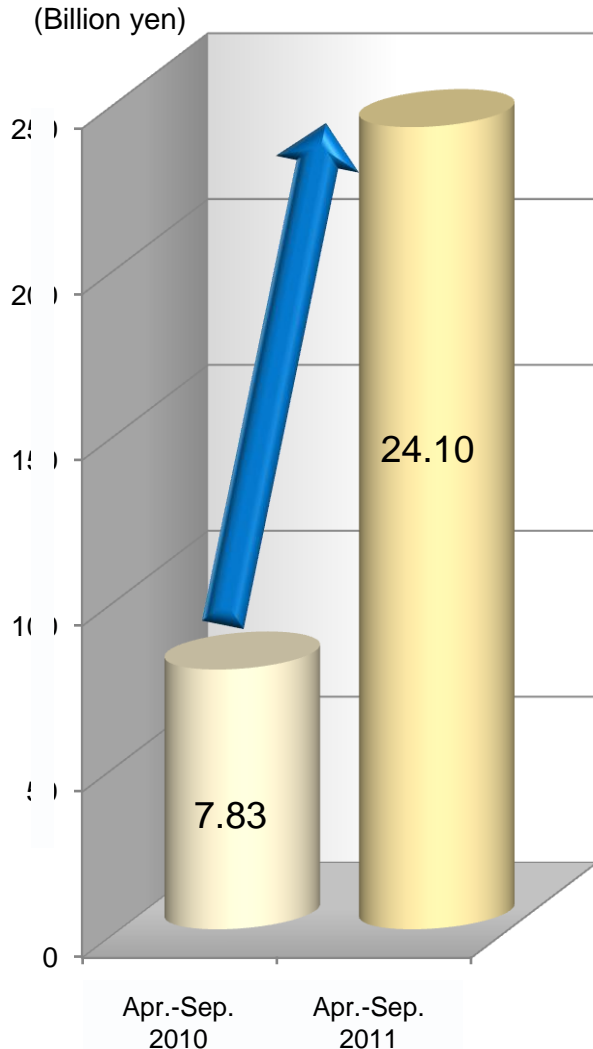
Growth by Overcoming the Impact of Aricept LOE in the U.S.



- Growth scenario by progressing the plan “*HAYABUSA*”
 - Rapid growth of new products
 - Expanding oncology franchise
 - Enriching epilepsy franchise
 - East Asia to win in the era of mega-competition
- Lean & efficient operations to maintain profitability
 - Reduction in alliance fees
 - Organizational streamlining effects
 - Strategic adaptation to environmental changes in the U.S.
- ROE management and confidence in securing annual dividend

Rapid Growth of New Products

Four new products launched in and after FY2010* achieved sales of 24.1B yen (YOY 308%) in 1H FY2011



Halaven: Launched in July in Japan; steady global expansion
 Humira: July - Obtained approval for juvenile idiopathic arthritis
 September - Submitted application for inhibition of structural damage of joints in rheumatoid arthritis
 Lyrica: Accelerated growth after restriction on administration period was lifted in July

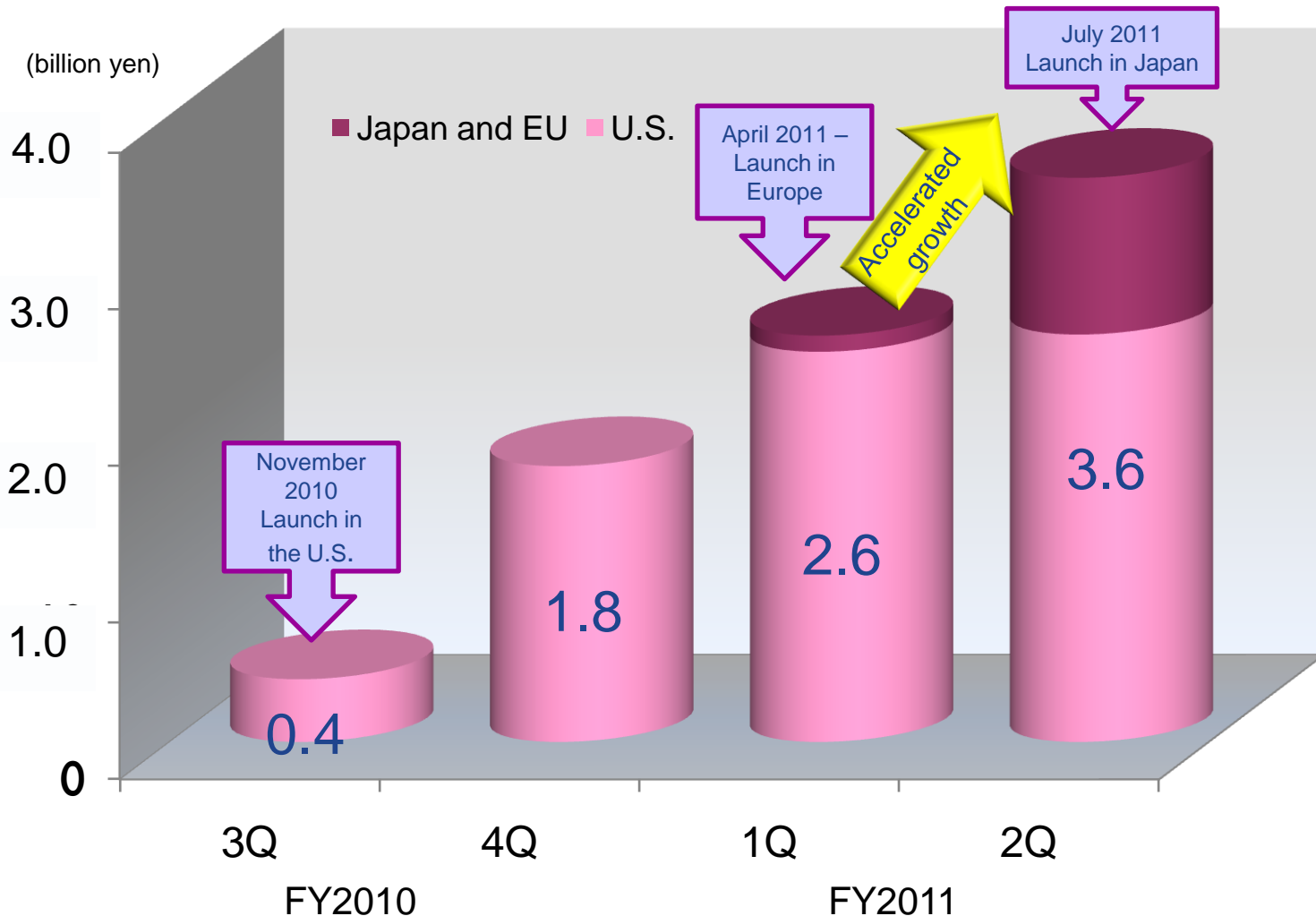
Next-generation growth drivers	(Billion yen)		
	Apr. - Sep. 2010	Apr. - Sep. 2011	Change from previous year
Halaven	-	6.23	+6.23
Treakisym /Symbenda	-	1.64	+1.64
Humira*	7.33	11.38	+4.05
Lyrica (alliance revenue)	0.5	4.86	+4.36
Total	7.83	24.10	+16.28 (308%)

*Including products with additional indications

Halaven Continues Global Growth

Trajectory of approx. one year after launch in the U.S.

Approved in 34 countries worldwide as of October 2011
 FY2011 target sales: 18.5 billion yen



Halaven - Characteristics of Global Marketing

Developing optimal marketing for each region



U.S	<ul style="list-style-type: none"> • Approx. 120 oncology medical reps to promote oncology franchise portfolio including Aloxi, Dacogen, Fragmin, and others • Market share at 10 months post launch (August 2011): <ul style="list-style-type: none"> - Captured 5% market share in third-line treatment for metastatic breast cancer*1 (Target share: 10%+ in the end of FY2011) - Captured 14% market share in fourth-line+ treatments, which are later expected to advance to third-line (Target share: 15%+ in the end of FY2011) • Halaven has the highest monotherapy agent share in third-line+ treatments
EU	<ul style="list-style-type: none"> • Oncology business unit (approx. 60 medical reps) to promote across Europe in accordance with 'One Europe' strategy • Launched in 11 out of 31 countries*2 • Patient access is increasing rapidly in countries offering reimbursement (8 including Germany, Sweden, and Switzerland)
JP	<ul style="list-style-type: none"> • "Made in Japan" cancer agent derived from natural product (sea sponge from offshore of Miura Peninsula) • Achieved simultaneous submissions in the U.S., EU, and Japan and received approvals within 13 months (minimized drug lag) • First drug to be granted approval with the highest 40% premium price based on its excellence, efficacy, and safety • Contributions to breast cancer patients in earlier line treatments than those in the U.S. and Europe with the indication of "inoperable or recurrent breast cancer"

*1 : IntelliView data from IntrinsiQ, LLC. Research, Market Share Data: 2010-2011;
 Information on proprietary and non-published data is available at www.intrinsiq.com; Accessed October 2011

*2: 31 countries: EU, EEA, and Switzerland

Halaven Value Maximization Strategy

Aiming for approvals of all 3 indications during the term of the plan "HAYABUSA"



● Breast cancer 2nd line

- Patient enrollment is complete (approx. 1,100 patients); studies are ongoing
- Study areas: U.S. and Europe; Control group: capecitabine; Primary endpoint: overall survival
- Target submission in FY2012 (U.S. and Europe)

Size of global market for breast cancer (2015)

2nd line: approx. \$2.4B*

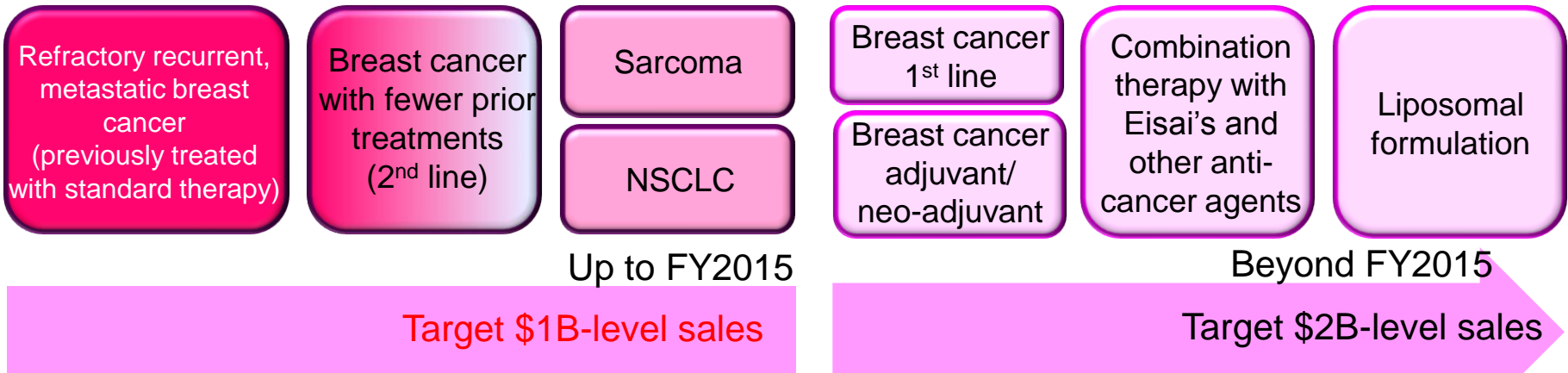
3rd line+: approx. \$2.6B*

● Sarcoma

- Phase III studies are ongoing
- Target submission in FY2014 (U.S., Europe, and Japan)

● Non-small cell lung cancer (NSCLC)

- Phase III studies are ongoing
- Target submission in FY2014 (U.S., Europe, and Japan)



Three Characteristics of Eisai Oncology

Diversified product creation activities

Naturally-derived



Antibody drugs



Small molecules



Genome-based

Commitment to women's oncology

Halaven

- Refractory recurrent, metastatic breast cancer with fewer prior treatments
Phase III (target submission: FY2012)
- 1st line (HER2+ and HER2-)
Phase II
- Adjuvant
Phase II
- Potential development of liposomal formulation

farletuzumab

- Platinum-sensitive ovarian cancer
Phase III (target submission: FY2012)
- Platinum-resistant ovarian cancer
Phase III
- Potential development of companion diagnosis

lenvatinib

- Thyroid cancer
Phase III
(target submission: FY2013)
- Endometrial carcinoma
Phase II
(target submission: FY2013)

Emphasis on East Asia

Halaven

Non-small cell lung cancer
3rd line+ (Phase III)
2nd line (Phase II)

farletuzumab

Non-small cell lung cancer
1st line (Phase II)

lenvatinib

Hepatocellular carcinoma
(Phase I/II)

Strategic Collaborations in Development of Anticancer Agents



Strategic collaboration with SFJ* to conduct phase III studies to evaluate the efficacy of lenvatinib in thyroid cancer (September 2011)

- Under the collaborative development agreement, clinical studies are continuously conducted by Eisai
- External study costs are wholly funded by SFJ
- When compound is approved, Eisai will make payment to SFJ as consideration

*SFJ Pharma Ltd.

Strategic collaboration with Quintiles to develop six anticancer compounds for eleven indications (October 2009)

- The companies share development costs and Quintiles's special team for the development of anticancer agents conducts POC studies following the basic plan determined at Executive Oversight Committee comprised of members from both companies
- Milestone payment to be made to Quintiles when the agreed-upon POC is demonstrated

Accelerate the clinical development of innovative drugs by leveraging external resources based on collaboration to simultaneously progress diverse projects

Perampanel Value Maximization Strategy

First-in-class AMPA receptor antagonist



- Partial onset seizures:
Submitted in Europe (May 25, 2011)
 - Application is under review in Europe; response expected in 2Q FY2012
 - Application to be re-submitted in 3Q FY2011 in the U.S.

Therapy for
partial onset
seizures

Primary generalized
tonic-clonic
seizures
(adjunctive therapy)
July: first patient-in

Lennox-Gastaut
syndrome

Partial onset seizures
(monotherapy)

Japan/Asia
partial onset seizures

Partial onset seizures
(pediatric, adjunctive
therapy)

Up to FY2015

Beyond FY2015

Target \$500M level sales

Target \$1B level sales

Enriching Epilepsy Franchise with Focus on perampanel

Current status of epilepsy treatment

- Number of epilepsy patients (2010) worldwide: 50 million+*¹
U.S., 5 major EU countries, and Japan (G7): 5.3 million*²
- Market size of G7 countries estimated to reach approx. \$4B in 2015*²
- About 20-40% of patients become refractory to current treatments*³
- New treatments are needed for those who cannot achieve adequate control or tolerate with existing treatments

Unmet Medical Needs for better seizure control

perampanel

First-in-class AMPA-type glutamate receptor antagonist that selectively targets the neuroexcitatory pathways thought to be important in many types of epilepsy

Banzel/Inovelon Zonegran ZEBINIX

Rich lineup of treatments with different mechanisms

Epilepsy franchise

YOY +25%
(local currency basis)

Seeking to become world's top-three company in epilepsy field by offering robust treatment options, leveraging value maximization of perampanel

Aricept in Japan to Win in the Era of Mega-Competition



Aricept FY2011 target sales: 114 billion yen

Full-stage penetration ratio*: seek approx. 70% in FY2013 from current approx. 60%

- Points of differentiation from other branded products

- Only agent to treat all stages of Alzheimer's disease (AD) from mild to severe
- Only agent that demonstrated significant symptomatic improvement in two endpoints (cognitive tests, and global assessment) in clinical studies in Japan
- Aricept strengthened its leading position while AD market rapidly expanded with aging of the society
- Plan to submit for Lewy body dementia in FY2012

- Information provision activities for Aricept brand

- Efficacy for improving cognitive function proven in 18 double-blind clinical studies in Japan and overseas
- Further enrichment in information provision for health insurance pharmacies, where over 70% of sales originate (seminars for AD and drug administration guidance, placement of disease awareness and drug administration guidance materials, and others)
- Focus on severe AD indication based on 10mg formulation led to 53% growth
Patent for severe AD indication is valid until June 22, 2013

Pariet in Japan to Win in the Era of Mega-Competition



Pariet FY2011 target sales: 60 billion yen
Aim for No.1 position in the rapidly expanding GERD market*

● Points of differentiation from other branded products

- Only PPI to treat full-stage (mild to severe) GERD
- Contribution to severe GERD patients with the world's first twice-daily dosing
- Information provision as the strongest PPI and accumulation of evidence
- Offer disease awareness DTC programs



● Efforts after generic entries

- Efficacy proven in 27 double-blind clinical studies in Japan and overseas
- Strengthen visits to health insurance pharmacies and provide value-added information about GERD
(self-diagnosis tool, diet recipes, disease awareness website “GERD navi”, and others)
- Provide quality evidence, including development/post marketing surveillance (PMS) evidence and physician-driven PMS evidence

Rapid Expansion of Business in China



New administration under locally-hired president and knowledge exchange in East Asia

Improved employee turnover ratio by 7 points from 23% to 16% (Apr. - Sep. 2010/2011)

Under stable organization management and HR development, major products grew steadily

- **Japan-China front-line medical reps and doctor interaction programs to promote Japan/China knowledge exchange underway**
- Aricept achieved 20%+ YOY growth in sales*¹
- Prescription of Aricept increased after reimbursement started in major cities such as Beijing and Shanghai
 - Beijing: reimbursement started from July 2011; +84% growth compared to pre-reimbursement*²
 - Shanghai: reimbursement started from January 2011; +48% growth compared to pre-reimbursement*³
- Growth level of 20% is expected for China business in this fiscal year*¹
- Initiated a new 4 business-unit structure (CNS, GI/liver, oncology, and primary care) with approx. 800 medical reps from October 2011



MR interaction program in Shanghai (10/24/2011)

Commitment in liver diseases

- Submitted clevudine for hepatitis B – potential market of 100 million patients*⁴ (aiming for market launch in 1H FY2012)
- Synergy expected with the core product, Strong Neo-Minophagen C for chronic hepatitis, to further enhance contribution to patients
- Robust pipeline to cover various liver diseases such as E5501 (thrombocytopenia associated with liver disease), LIVACT (improvement of hypoalbuminemia in patients with decompensated hepatic cirrhosis), and lenvatinib (hepatocellular carcinoma)

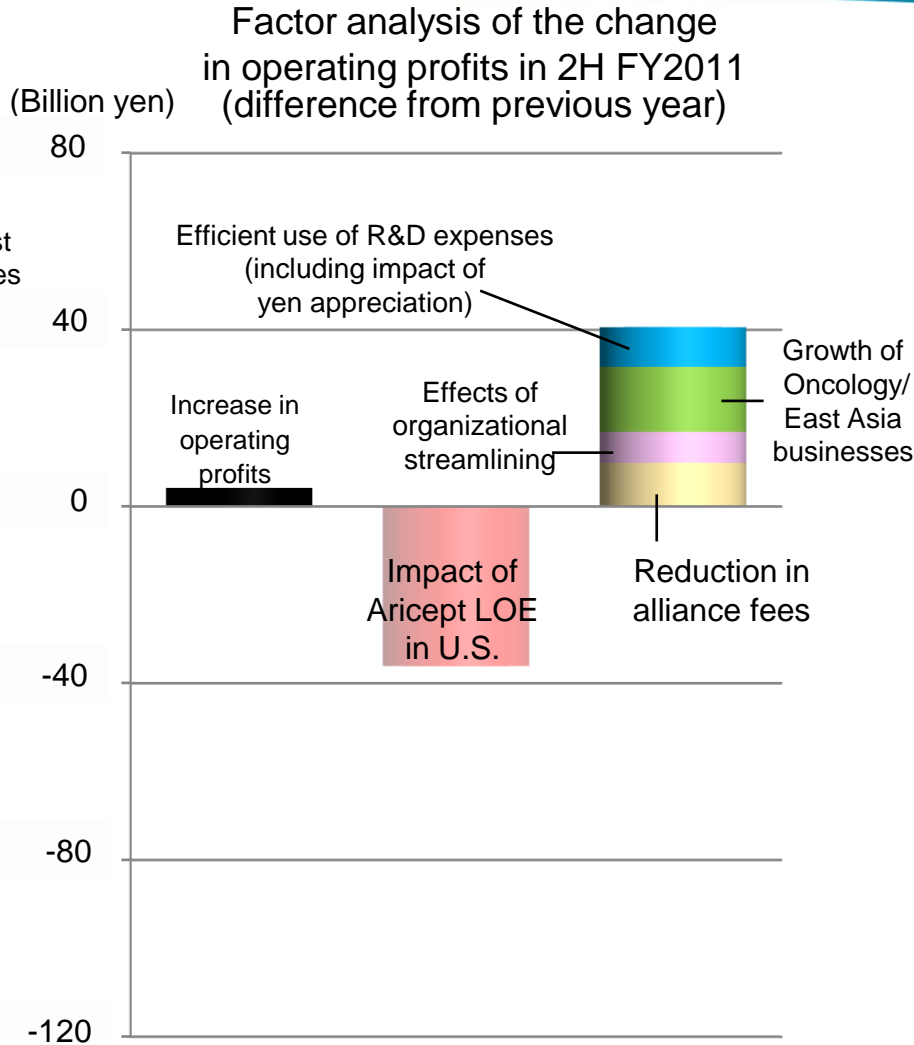
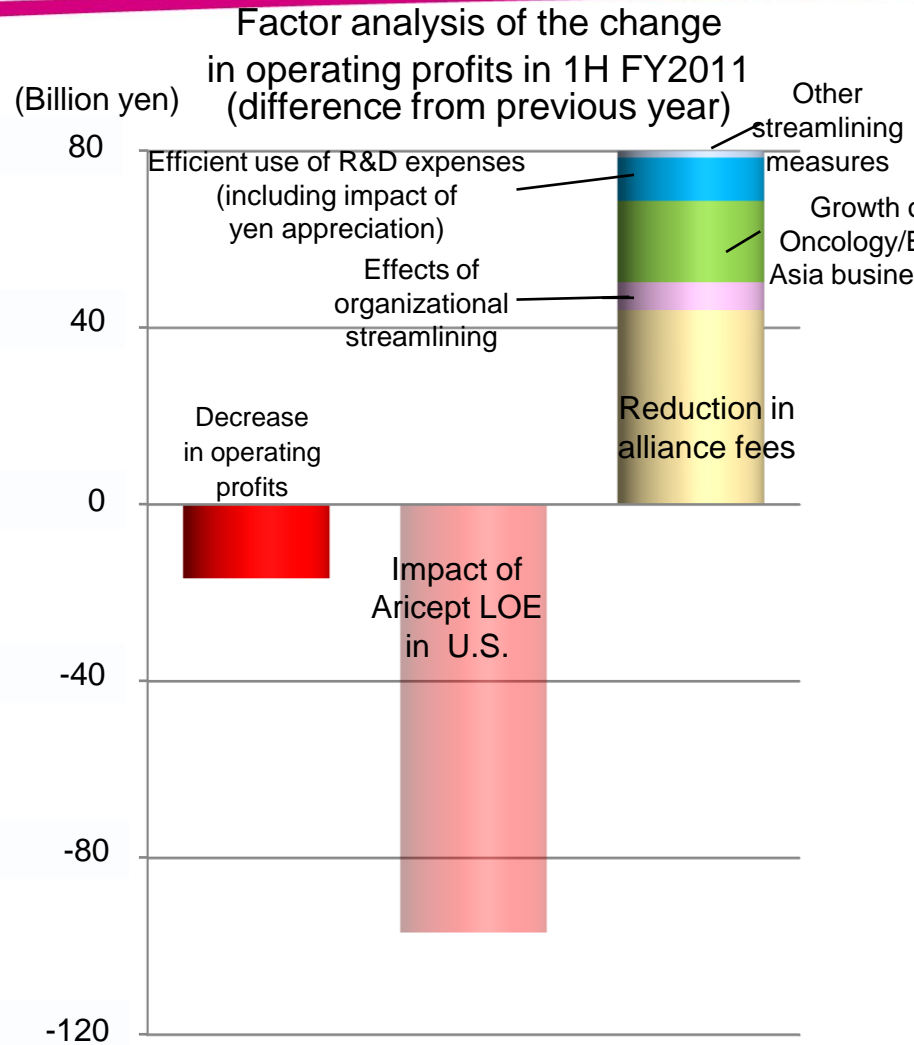
¹⁸ *¹ Local currency basis *² Comparison of two months (cumulative) before and after the start of reimbursement

*³ Comparison of three months (cumulative) before and after the start of reimbursement (based on hospital sales data, including effects of re-listing in reimbursement list of hospitals) *⁴ Hepatitis B patients including HBV carriers (7%+ of Chinese population), Source: 2006 National sero-epidemiological investigation

Lean & efficient operations to maintain profitability

Growth by Overcoming the Impact of Aricept LOE in the U.S.

Offset approx. 90% of reduction in operating profits due to U.S. LOE impact in FY2011



Overcome the impact of U.S. Aricept LOE at the operating profits level in 2H FY2011 through reduction in alliance fees, growth of oncology franchise and East Asia business, and other factors

Progress of Lean & Efficient Operations

Reduction in alliance fees and organizational streamlining effects

	1H FY2011 Analysis of alliance fees and organizational streamlining effects		2H FY2011 Analysis of alliance fee and organizational streamlining effects	
Alliance fees	Alliance fees Difference from the previous year	Approx. -45 billion yen	Alliance fees Difference from the previous year	Approx. -10 billion yen
	Alliance fees YOY	Approx. 45%	Alliance fees YOY	Approx. 80%
Organizational	Reduction in personnel expenses due to organizational streamlining (COGS, R&D, and SG&A expenses)	Approx. -6 billion yen	Reduction in personnel expenses due to organizational streamlining (COGS, R&D, and SG&A expenses)	Approx. -7 billion yen

Strategic Adaptation to Environmental Changes in the U.S.

Paradigm shift to adaptive-to-change commercial structure

- Total MRs from approx. 920 in FY2010 to approx. 370 (reduction of approx. 550)
 - Primary Care & Specialty MRs: from approx. 440 in 1Q FY2011 to approx. 250
 - Oncology MRs: maintaining approx. 120
- Strengthened patient access through enhanced reimbursement support by Managed Markets

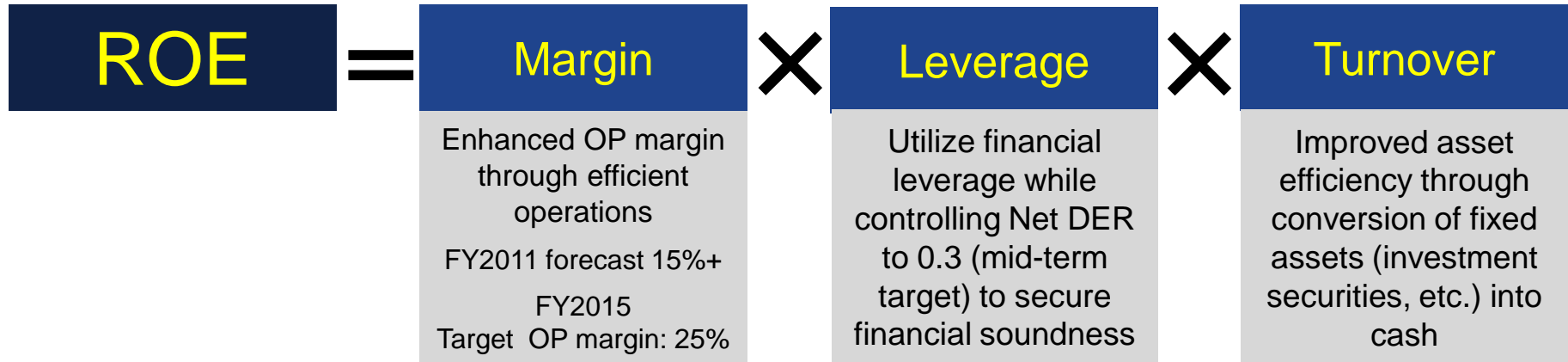
Value creation through cutting-edge technology

- H3 Biomedicine Inc. (efforts for personalized medicine in oncology)
 - Target selection based on bioinformatics analysis of patient genetics
 - Create unique chemical compounds utilizing DOS (Diversity-Oriented Synthesis) and conduct new high-throughputs including those for protein-protein interaction
- North Carolina (RTP) Plant
 - Maximize value via in-house formulation manufacturing of Halaven, the masterpiece in organic synthetic chemistry
- Pilot Plant at Morphotek Inc.
 - Shorten development period by securing freedom and flexibility in manufacturing antibodies



Leading the Shareholder Value Creation by ROE Management

Executing strategic policies to enhance ROE

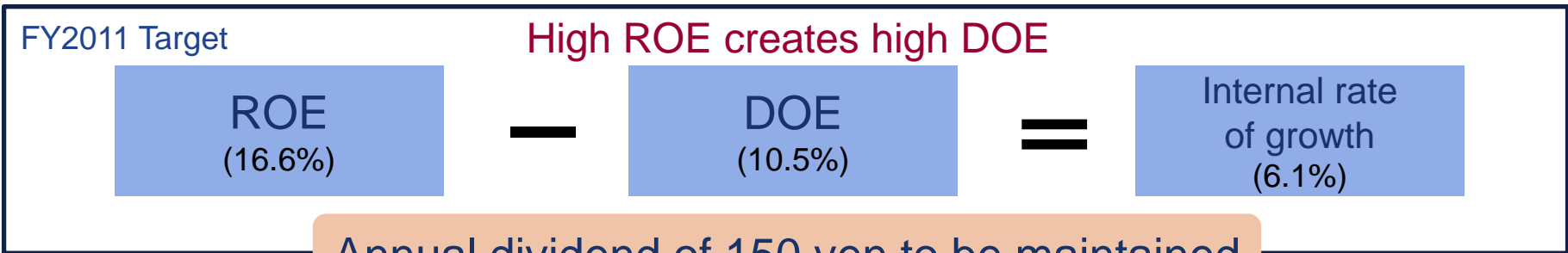


Total shareholder return will converge with ROE in the long term

Forecast for FY2011
ROE 16.6%
(Top-rank performance among Japanese companies)



Plan "HAYABUSA" target in FY2015
ROE 20%+
(Global top-tier, high-performance company)



Annual dividend of 150 yen to be maintained

Forecast for FY2011 Consolidated Financial Results

KPI to be on track of the plan “HAYABUSA” (enhancement of OP margin and ROE, maintenance of EPS and annual dividend)



(Billion yen, %)

	FY2010		FY2011		
	Results	%	Forecast	%	YOY
Sales	768.9	100.0	654.0	100.0	85
Cost of Sales	167.8	21.8	173.0	26.5	103
Gross Profit	601.1	78.2	481.0	73.5	80
R&D Expenses	145.0	18.9	123.5	18.9	85
SG&A Expenses	343.0	44.6	257.5	39.4	75
Operating Income	113.1	14.7	100.0	15.3	88
Ordinary Income	105.2	13.7	94.0	14.4	89
Net Income	67.4	8.8	67.5	10.3	100
EPS (yen)	236.5		236.9		
ROE (%)	16.4		16.6		
DOE (%)	10.4		10.5		
Cash Income	120.0		116.0		
Dividends (yen)	150		150		

Cash income is the total amount of cash available for investments for growth, business development, dividend payment, and repayment of borrowings, etc.
 Cash income = Net income + Depreciation of PP&E and Amortization of intangible assets + In-process R&D + Amortization of goodwill + Loss on impairment (including loss on devaluation of investment securities)

24 FY2010 average exchange rate: U.S. \$ = 85.7 yen, Euro = 113.1 yen, GBP = 133.1 yen
 Estimated exchange rates for 3Q-4Q FY2011: U.S. \$ = 77 yen, Euro = 100 yen, GBP = 115 yen

Reference Data

Performance of East Asia Pharmaceuticals Business



(Billion yen, %)

	April – September 2010		April – September 2011		
	Results	%	Results	%	YOY
Sales	185.3	100.0	199.6	100.0	108 [108]
Aricept	53.6	28.9	60.4	30.3	113 [113]
Pariet	31.8	17.1	31.1	15.6	98 [98]
Methycobal	19.6	10.6	18.9	9.5	96 [98]
HUMIRA	7.3	4.0	11.4	5.7	155 [156]
Stronger Neo-Minophagen C/ Glycyron Tablets	4.0	2.2	3.9	1.9	96 [99]
Segment Profit	75.6	40.8	84.1	42.2	111

[] based on local currency

Performance of East Asia Pharmaceuticals Business



<Japan>

(Billion yen, %)

	April – September 2010		April – September 2011		
	Results	%	Results	%	YOY
Sales	170.9	100.0	185.6	100.0	109
Prescription	152.5	89.3	165.9	89.4	109
Aricept	50.9		57.6		113
Pariet	29.9		29.7		99
Methycobal	15.6		15.0		96
HUMIRA	5.7		9.7		171
Actonel	5.8		5.7		99
OTC	9.7	5.7	10.5	5.7	108
Generics	5.7	3.3	6.3	3.4	112
Diagnostics	3.0	1.7	2.9	1.6	98
Segment Profit	72.3	42.3	80.9	43.6	112

<China>

(MM RMB, %)

	April – September 2010		April – September 2011		
	Results	%	Results	%	YOY
Sales	649	100.0	674	100.0	104
Methycobal	299	46.1	305	45.2	102
Stronger Neo-Minophagen C/ Glycyron Tablets	121	18.7	139	20.6	114
Aricept	50	7.6	61	9.0	122
Pariet	63	9.8	42	6.2	66

Performance of U.S. Pharmaceuticals Business



[\$ million]

		April – September 2010		April – September 2011		
		Results	%	Results	%	YOY
Sales		2,043	100.0	1,027	100.0	50
Aricept		1,192	58.4	92* ¹	8.9	8
AcipHex		382	18.7	358	34.8	94
	Halaven	—		64		—
	Aloxi	195		229		118
	Dacogen	94		106		113
	Total MGI	307		352		115
	Fragmin	96		91		94
Total oncology-related products		435	21.3	534	52.0	123
Segment Profit*²		643	31.5	229	22.3	36

*1 Including Aricept 23 mg sales of \$23M and \$35M revenue from AG (Authorized Generic).

*2 Segment profit from U.S. pharmaceuticals business in local currency was calculated based on average exchange rate.

Performance of Europe and New Market ASEAN Pharmaceuticals Business



<Europe>

(Billion yen, %)

	April – September 2010		April – September 2011		
	Results	%	Results	%	YOY
Sales	22.1	100.0	23.8	100.0	108 [109]
Aricept	11.6	52.6	12.7	53.2	109 [110]
Pariet	3.7	16.7	2.7	11.4	74 [74]
Zonegran	2.1	9.4	2.3	9.6	110 [111]
Segment Profit	2.8	12.6	3.9	16.2	138

[] based on local currency

<New Markets & ASEAN>

(Billion yen, %)

	April – September 2010		April – September 2011		
	Results	%	Results	%	YOY
Sales	3.5	100.0	3.7	100.0	106 [111]
Aricept	0.8	23.9	0.9	25.3	112 [117]
Pariet	0.9	25.5	1.0	25.9	107 [113]
Segment Profit	0.6	17.8	0.5	14.8	87

[] based on local currency