



Sandoz Division



Pioneering Access for Patients: The Sandoz company presentation

Our Purpose

Pioneering Access
for Patients

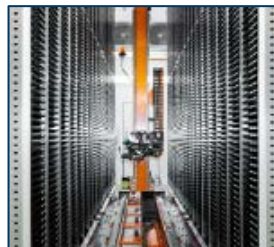


An overview of who we are



A Novartis Division

We are uniquely positioned as an industry-leading division of Novartis (USD 52 bn 2018 sales)



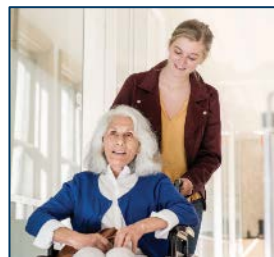
A Global Leader

We have leading positions in biosimilars, antibiotics and generic oncology



A Broad Portfolio

We cover all major therapeutic areas and geographic regions with our broad portfolio of off-patent medicines



A True Partner

We work closely with commercial and scientific partners to maximize our collective contribution to society.

¹ IQVIA through December 2018, #1 in antibiotics (by volume), generic oncology (by sales); #2 in biosimilars (by sales); first FDA-cleared PDT (reSET)

We are the global generic leader in antibiotic medicines¹



- Antibiotics are the cornerstone of global healthcare – generics represent the majority of the global market²
- As the global leader in generic antibiotics, we play a key role in keeping healthcare sustainable
- Antimicrobial resistance (AMR) could lead to an estimated 10m more deaths annually by 2050, unless society acts now³



1. IQVIA through 2019

2. 76% by volume, 62% by value (IMS through 2016)

3. Review on Antimicrobial Resistance, 2016

We are also the global leader in generic oncology medicines



- Leading global generic oncology portfolio of >50 products, from chemotherapy, via hormones and supportive care, to biologics¹
- Our oncology medicines reach patients in nearly 100 countries
- Sandoz Oncology offering is strongly complementary to leading innovative presence of Novartis Oncology



1. IQVIA through 2019, definition excludes biosimilars.

We are a leader in biosimilars, with eight marketed products

Omnitrope[®]
Somatotropin

 **BINOCRIT**[®]
epoetin alfa

 **ZARZIO**[®]
filgrastim

RIXATHON[®]
rituximab

 **Hyrimoz**[®]
adalimumab

 **Zessly**[®]
infliximab

 **Erelzi**[™]
etanercept

 **ZIEXTENZO**[®]
pegfilgrastim

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THANK YOU