



Perspectives 2014

Transformation at Sandoz Frankfurt

Approaches, Tools & Results of the last 10 years

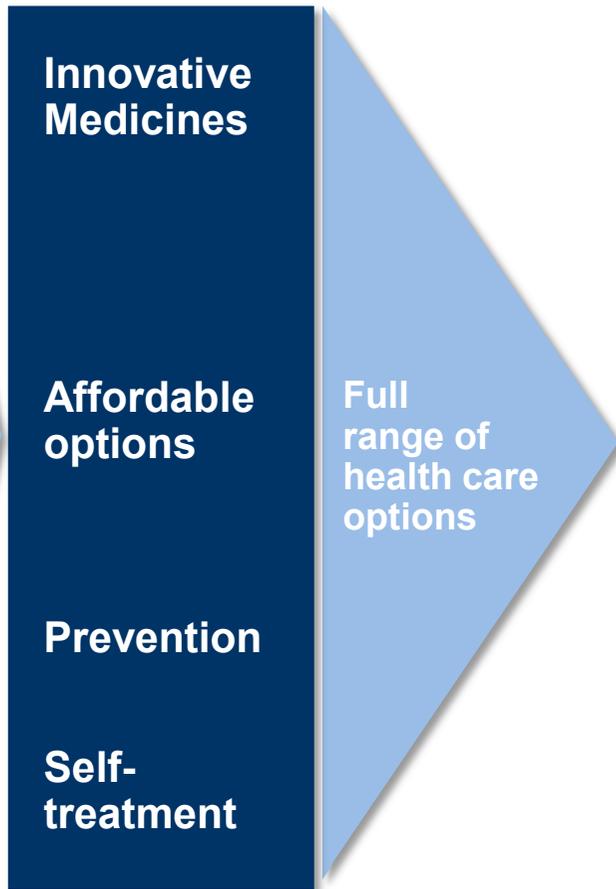
Dieter Kramer, Managing Director, Sandoz Industrial Products GmbH
Frankfurt am Main, 16.07.2014

Sandoz – a Novartis Group company

Environment



Patients' needs



Novartis portfolio

Pharmaceuticals	32.2
Alcon	10.5
Sandoz	9.2
Consumer Health	4.1
Vaccines & Diagnostics	2.0

2013 sales

(USD billion)

32.2

10.5

9.2

4.1

2.0

Sandoz business is based on 3 major pillars (BUs)

1

Retail Generics

- Country organizations
- Own brands
- Broad generic portfolio

2

Biopharma and Oncology Inj.

- Biosimilars
- Biotech cooperations
- Building a strong portfolio in oncology and injectables

3

Anti-Infectives

- FDFs (Private label)
- APIs
- Intermediates
- Basic Compounds

Status Quo

- World leader in Amoxicillin & Clavulanic Acid
- No. 2 Gx company worldwide
- Pioneer in biosimilars with three marketed products

Global production and development network

Cooperations with Novartis in several areas

The healthcare environment is undergoing unprecedented change



Aging population

The world's population is aging. More healthcare treatments are needed, also prompting payors to aggressively manage costs.



Unhealthy lifestyles

Poor nutritional habits and sedentary lifestyles are increasing the prevalence of chronic diseases



Emerging markets

Economic growth of emerging countries is providing healthcare access



Advances in science and technology

New technological discoveries and trends are enabling the development of innovative medicines while increasing the cost of innovation