

Extending our leadership in oncology

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Roche in oncology

Growth drivers – our brands

Summary

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Q1 '06: A strong start for the year

- Group sales rose 15 % in local currencies, 22 % in CHF
- Oncology strong growth contribution (+52 %¹)
- Top ten products growing +38 %¹, top 20 +28 %¹
- Rituxan approved in US for first rheumatoid arthritis indication
- First in a series of filings in oncology
 - Herceptin for adjuvant breast cancer in US and EU
 - Japanese filings for Avastin in mCRC, Tarceva in NSCLC

¹ local growth

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Pharma strongly out-growing worldwide markets

CHF 1.6 bn additional organic sales



Sales CHF m	Q1 '05	Q1 '06	% change in	
			local	CHF
Roche Pharma	3,859	4,821	19	25
Genentech	1,341	2,056	40	53
Chugai	955	862	-8	-10
Pharmaceuticals	6,155	7,739	19	26

	% of pharma sales	growth (local)	market growth
Oncology	46 %	52 %	19 % ²
Transplantation	7 %	14 %	8 % ²
Virology	7 % ¹ /15 %	-3 % ¹ /14 %	9 % ^{1,2}
Renal Anemia	5 %	0 %	9 % ³
Total	74 %	33 %	

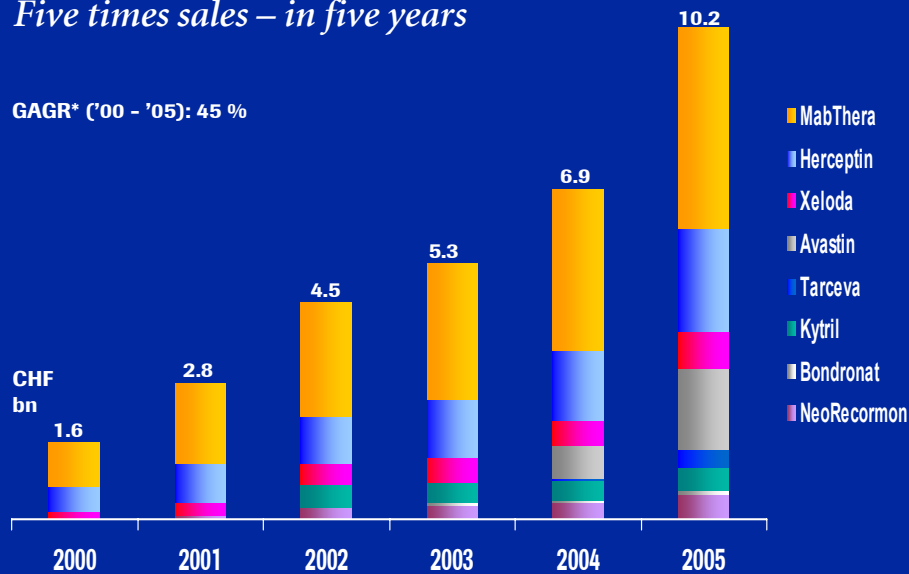
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Roche Oncology: clear market leader

Five times sales – in five years



GAGR* ('00 - '05): 45 %



* Compound Annual Growth Rate

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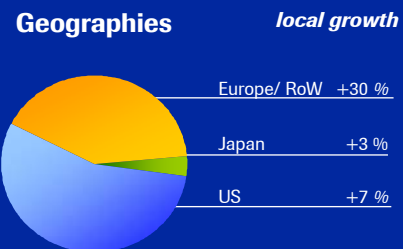
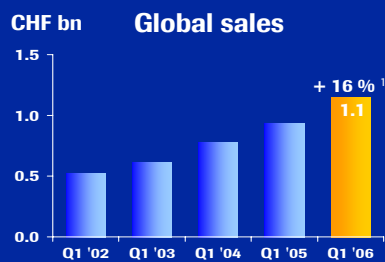
Roche in oncology

Growth drivers – our brands

Summary

MabThera / Rituxan

Increasing penetration in EU/ RoW fuelling growth



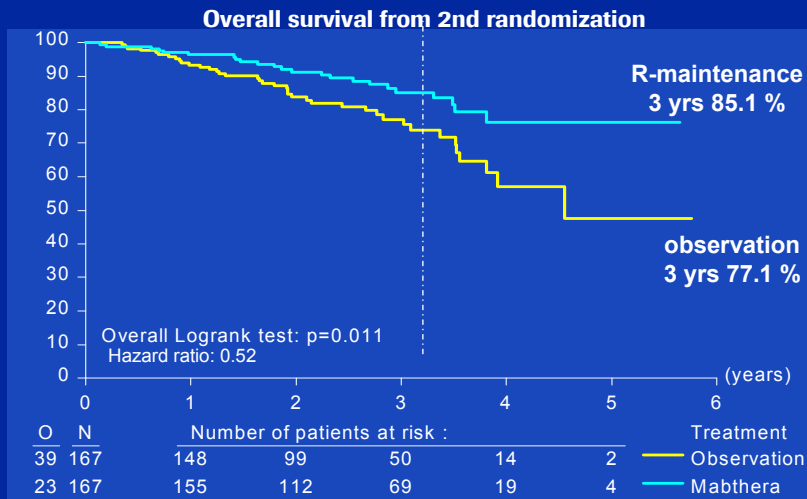
- Sales of CHF 1.1 bn
- Now approved for first-line aNHL treatment in the US
 - filed for first-line iNHL with the FDA in March
- iNHL maintenance approval pending in EU

¹ local growth

Intergroup phase III trial (EORTC 20981)



MabThera maintenance in relapsed iNHL



Presented at ASH '05

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MabThera



Three approaches to drive sales

1. increase penetration
2. multiple treatments (re-treatment)
3. prolong treatment (maintenance)

	1 st line	Relapse	Maintenance
Indolent NHL	EU: approved '04 US: filed Mar '06 (8 infusions)	EU: approved '98 US: approved '97 (4 infusions)	EU: filed Q4 '05 (8-16 infusions)
Aggressive NHL	EU: approved '02 J: approved '03 US: approved '06 (8 infusions)		
CLL	Phase III	Phase III	

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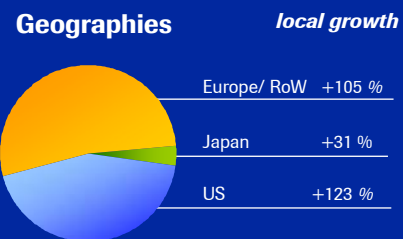
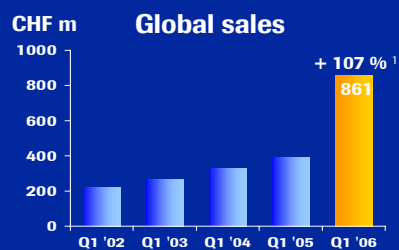
MabThera

Summary and outlook

- Outstanding clinical data and extensive development and post-marketing program:
 - 10,000 patients in randomized clinical trials
 - CLL phase III ongoing
- Still significant sales potential – regional upsides:
 - US: CLL and maintenance
 - EU: indolent NHL (1st line and relapse), maintenance and CLL
 - RoW: indolent and aggressive NHL, maintenance and CLL
- Long patent protection
- Limited competition

Herceptin

Sales doubled



- Sales of CHF 861 m
- Use in adjuvant BC continues to accelerate growth
- Filed for adjuvant BC in EU and US in Q1 as planned
- TAnDEM data expected in 2006

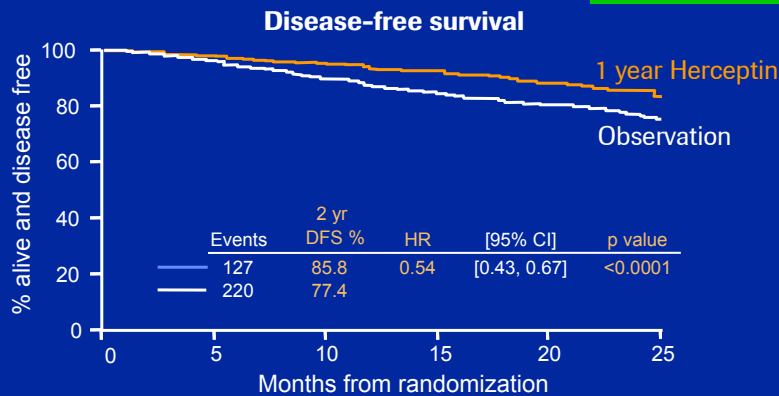
¹ local growth

Herceptin for adjuvant therapy of BC - HERA



Compelling benefit of 50 % reduction in the risk of disease recurrence

Filed EU & US Q1 '06
CHMP +ve opinion Apr 28



No. patients at risk :						
1 year Herceptin	1694	1472	1067	629	303	102
Observation	1693	1428	994	580	280	87

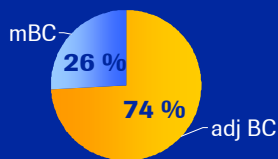
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Patients over-expressing HER2 should receive Herceptin: Proven survival benefit

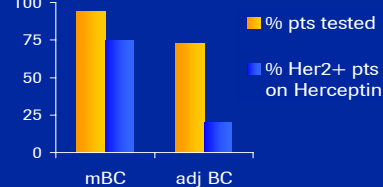


5 key EU countries

Breast cancer cases



% patients tested and treated survey data Q4 '05



- Huge potential in adjuvant BC
 - 4 large randomised studies
 - HERA 2 year data: final analysis '08
- Further up-side in mBC 1st line setting
 - increased penetration
 - combination with hormones

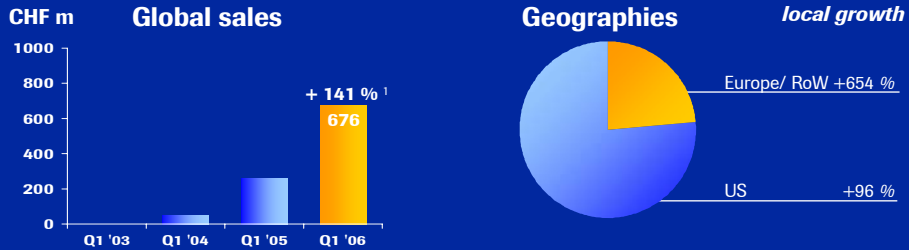
Herceptin will become the standard of care for HER2 positive breast cancer patients

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Avastin



Sales more than doubled – strong EU entry



- Sales of CHF 676 m
- Filed for first-line treatment of NSCLC in the US
- Filed for metastatic colorectal cancer in Japan
- Filings currently under preparation: mBC US/EU, mNSCLC in EU, mCRC oxaliplatin/ Xeloda-combo EU
- Update on safety data review for AVANT (adj CC) in May
- First-line RCC phase III data expected this year

¹ local growth

Avastin: Investment approach paying off



Proven benefit in 3 tumor types

Indication	Status
mCRC 1 st line	<ul style="list-style-type: none"> • 35 % reduction in the risk of death • Trial ongoing with oxaliplatin (NO16966) • Approved US/ EU
2 nd line	<ul style="list-style-type: none"> • 24 % reduction in the risk of death (E3200) • Filed US
mBC 1 st line	<ul style="list-style-type: none"> • 50 % reduction in the risk of cancer progression (E2100) • 33 % reduction in the risk of death¹ (OS) • Filing Q2 '06
NSCLC 1 st line	<ul style="list-style-type: none"> • 23 % percent reduction in the risk of death (E4599) • AVAIL (BO17704) ongoing with cisplatin/gemcitabine • Filed US Q1 '06, Filing EU 2006

¹ data as presented at ASCO 2005

Avastin: Establish as “backbone therapy” A combination partner to current standards

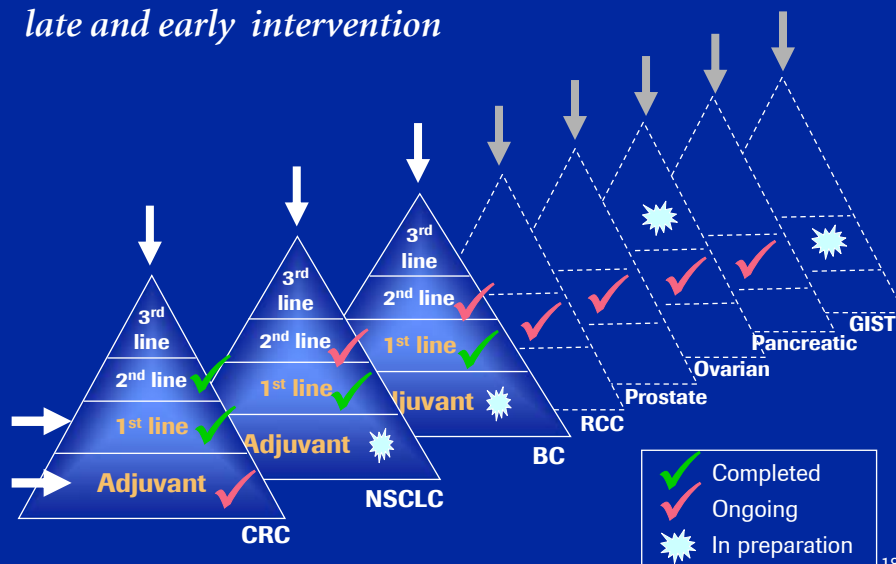


CRC	NSCLC	BC
<ul style="list-style-type: none"> • 5-FU/Leucovorin • Irinotecan ❖ Oxaliplatin ❖ Xeloda ○ New biologics 	<ul style="list-style-type: none"> • Platinum-based chemotherapy ❖ Single agent (navelbine or gemcitabine) ❖ Non-platinum based regimens ❖ Tarceva ○ New biologics 	<ul style="list-style-type: none"> • Taxanes ❖ Anthracyclines ❖ Xeloda ○ Hormones ○ Herceptin ○ New biologics

- positive data
- ❖ trials ongoing
- trials planned

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Avastin: A unique development approach Parallel development: all main cancer types, late and early intervention



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Trials of Avastin and Oxaliplatin

Expanding usage in first-line therapy for mCRC

Trial	n	Treatment	Status
NO16966	1,920	FOLFOX-4 ± Avastin vs. XELOX ± Avastin	Recruitment completed, final data and EU filing '06
TREE-2	223	FOLFOX-6 + Avastin vs. FOL + Avastin vs XELOX + Avastin	Final data to be presented at ASCO '06

FOLFOX = infused 5-FU/LV + oxaliplatin
 XELOX = Xeloda + oxaliplatin
 bFOL = bolus 5-FU + oxaliplatin

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Trials in adjuvant colon cancer

Moving into early treatment

Phase III Trials	n	Treatment	Status
AVANT	3,450	FOLFOX-4 ± Avastin vs. XELOX + Avastin	Started Q4 '04, filing post 2009
NSABP C-08	2,500	FOLFOX-6 ± Avastin	Started Q3 '04

- Recruitment in AVANT temporarily stopped
- DSMB analysis and further update will be provided in May

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Further phase III trials in NSCLC & BC

Covering key stages and combinations

NSCLC	Treatment	Status
adjuvant	TBD	In preparation
1st line non-squamous AVAIL (E4599)	Cisplatin/Gemcitabine ± Avastin	Filed in US, Ongoing in EU
1st line maintenance ATLAS	CT + Avastin → Avastin ± Tarceva	Initiated Q1 '05
2nd line	Tarceva ± Avastin	Ongoing

BC	Treatment	Status
1st line mBC RIBBON-1	CT (inc. Xeloda) ± Avastin	Initiated Q4 '05
2nd line mBC RIBBON-2	CT ± Avastin	Initiated Q1 '06

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Trials expanding the portfolio even further

A molecule with multi-tumor therapy potential

Phase III Trials	n	Treatment	Status
RCC			
1st line			
CALGB90206	700	Interferon ± Avastin	Data in '06
AVOREN	638	Interferon ± Avastin	Data in '06; Filing EU '07
Pancreatic Ca			
1st line			
CALGB80303	540	Gemcitabine ± Avastin	Ongoing
BO17706	600	Gemcitabine/Tarceva ± Avastin	Ongoing, Filing EU '08
Prostate Ca refractory	1,000	Taxotere ± Avastin	Started Q2 '05, Filing EU post '09
Ovarian Ca			
1st line			
GOG 218	2,000	Carboplatin/ paclitaxel ± Avastin	Started Q3 '05
ICON7	1,000	Carboplatin/ paclitaxel ± Avastin	In preparation, Filing EU post '09

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Avastin



Proven survival benefit in multiple tumour types

- Strongest launch of an oncology product
 - sales 1.7 bn CHF in 2005 in less than 2 years on the market
- Extensive development program unique in breadth and scope
 - ongoing projects in 8 tumour types, in different settings
 - over 20,000 patients (excluding collaborative trials)
- Establishing standards of care

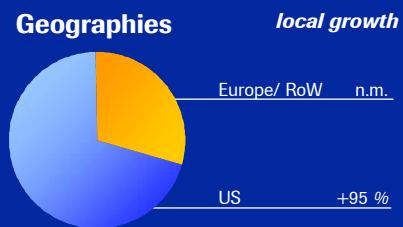
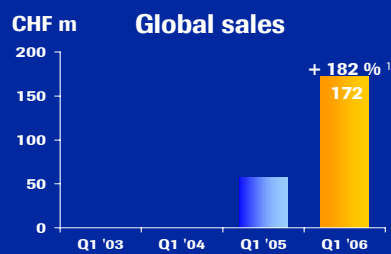
Avastin-based treatment regimens on track to become backbone therapy for all solid tumors

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Tarceva



Strong launch in Europe



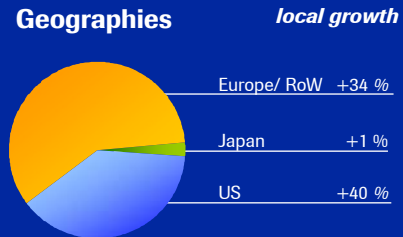
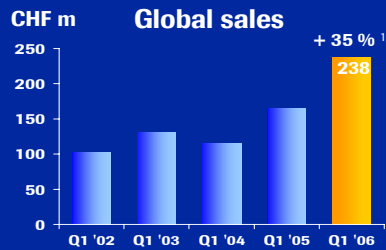
- Sales of CHF 172 m
- Very successful initial roll-out in Europe
- Pancreatic cancer under regulatory review in EU
- Filed for advanced NSCLC in Japan

¹ local growth

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Xeloda

Increasing use in adjuvant colon cancer



- Sales of CHF 238 m
- Successful launch in adjuvant colon cancer (monotherapy)
 - US market share in adjuvant colon cancer around 20 %²
- Positive phase III data in gastric cancer, full data at ASCO
- Filing of 1st line mCRC combo & gastric cancer on track for this year

¹ local growth

² MAT March 2006

Roche in oncology

Growth drivers – our brands

Summary

Data to be presented at upcoming ASCO

Reinforcing our oncology leadership



Product	Indication	Trial	Regimen	Phase	Data
Avastin	mCRC 1st line	BRITE	Avastin + standard CRC chemotherapy	IV	Safety and early efficacy data
Avastin	mCRC 1st line	TREE1, TREE2	XELOX vs bFOL vs FOLFOX (+ Avastin in all arms of TREE2)	II	Final
Avastin	mCRC 1st line	BEAT	Avastin + standard CRC chemotherapy	III/IV	Safety and early efficacy data
Avastin + Tarceva	NSCLC 2nd line	OSI2950	Taxotere or Alimta vs. Taxotere or Alimta + Avastin vs. Avastin + Tarceva	II	Final
Herceptin	mBC 1st line	BCIRG 007	Taxotere + Herceptin vs. Taxotere + Carboplatin + Herceptin	III	Interim (TTP)
Xeloda	Gastric Ca 1st line	ML17032	Cisplatin + Xeloda vs. Cisplatin + 5FU	III	Final
MabThera	iNHL	FL2000	CTx12 vs. CTx6 + MabThera	III	Final
Diagnostics microarray	Leukemia	MILE	molecular sub-classification of leukemia by gene expression profiling vs. standard lab methods	Validation	Interim data (stage I)

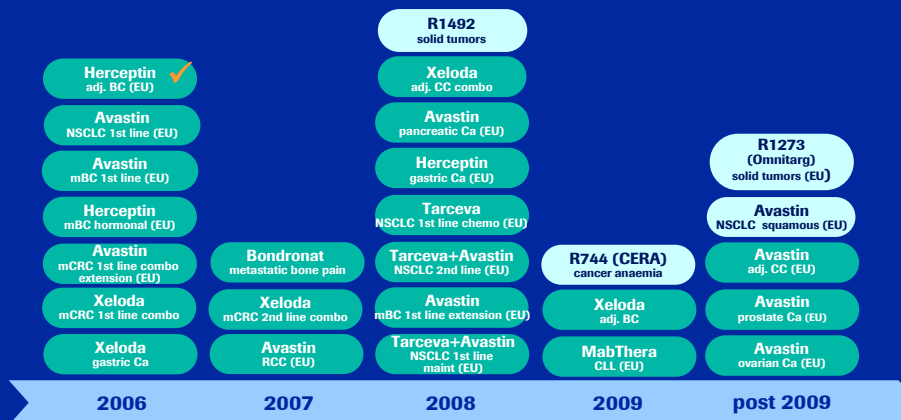
Roche Oncology Event: Zurich, June 19

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Major Roche managed projected submissions in Oncology over the next years



Phase II
Phase III



Status as of March 31, 2006

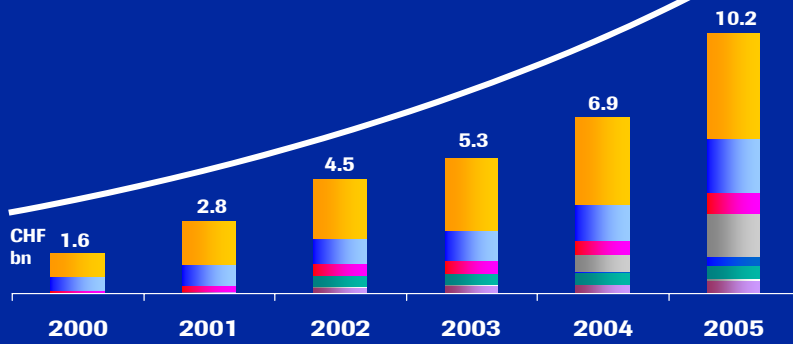
Unless stated otherwise, submissions will occur in US and EU

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Growing from an already strong position ...
...and setting new standards in Oncology care



- Huge growth potential in commercialised products
- Extensive development program
- Well positioned ahead of competition



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