Investor Update

Roche

Basel, 13 October 2011

Roche posts solid sales performance in first nine months, achieves significant progress with personalised healthcare approaches

- **Group sales** rise 2% at CER[1] (-12% in Swiss francs; +7% in US dollars), excluding Tamiflu
- **Significant foreign exchange impact** of -13% due to appreciation of Swiss franc; overall Group sales at 31.5 billion Swiss francs
- **Pharmaceuticals sales** excluding Tamiflu rise 1% (-13% in Swiss francs; +6% in US dollars) and **Diagnostics sales** 6% (-8% in Swiss francs; +11% in US dollars)
- **Major drivers** are Roche's leading cancer medicines Herceptin (+8%) and MabThera/Rituxan (+7%), eye medication Lucentis (+26%), rheumatoid arthritis medicine Actemra (+86%) and Professional Diagnostics business (+9%)
- **Successful US launch of targeted skin cancer medication Zelboraf** and companion diagnostic cobas BRAF Mutation Test following FDA approvals in August; EU approval expected in Q1 2012.
- EU expert panel recommends approval of **Avastin** as front-line therapy for ovarian cancer
- **Positive results from 7 phase III registration studies** in first 9 months, including new data in July for targeted breast cancer medicine pertuzumab
- Full-year **outlook for 2011 confirmed**

Sales in millions of CHF	**Nine months ended 30 September**		**% change**		
	2011	**2010**	**At CER***	**In CHF**	**In USD**
Pharmaceuticals Division	24,397	28,395	-1	-14	4
Excluding Tamiflu	24,096	27,587	1	-13	6
United States	9,104	10,878	1	-16	1
Excluding Tamiflu	8,934	10,675	1	-16	1
Western Europe	6,210	7,295	-4	-15	3
Excluding Tamiflu	6,189	7,292	-4	-15	3
Japan	2,712	3,137	-6	-14	5
Excluding Tamiflu	2,643	2,949	-2	-10	9
International**	6,371	7,085	1	-10	9
Excluding Tamiflu	6,330	6,671	6	-5	15
Diagnostics Division	7,095	7,732	6	-8	11
Roche Group	31,492	36,127	0	-13	6
Excluding Tamiflu	31,191	35,319	2	-12	7

* Constant exchange rates versus YTD Sept. 2010; **Asia–Pacific, CEMAI (Central and Eastern Europe, Middle East, Africa, Central Asia, Indian Subcontinent), Latin America, Canada, Others

[1] Constant exchange rates (see footnote on p.2).

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Commenting on the Group's 2011 performance to date, **Roche CEO Severin Schwan** said: "Roche's solid sales performance in the third quarter is in line with our expectations. We're on track to achieve our targets for 2011. The successful US launch of our new melanoma medicine Zelboraf and the diagnostic cobas BRAF test has strengthened our leading position in personalised healthcare. The good results we have achieved with new medicines in seven late-stage clinical trials so far this year further enhance our prospects for future growth."

Solid growth in first nine months

In the first nine months of 2011 Group sales at constant exchange rates[2] increased by 2% (-12% in Swiss francs, +7% in US dollars); this is excluding Tamiflu sales, which as expected were significantly lower than in the previous year. Group sales overall were stable (-13% in Swiss francs; +6% in US dollars) at 31.5 billion Swiss francs. Sales performance in both the Pharmaceuticals and the Diagnostics Division reflects the strength of the Group's business, as well as the impact of the strong appreciation of the Swiss franc against all currencies relevant for Roche.

Seven positive registration studies

In the first nine months of 2011 Roche reported positive data from seven clinical studies, several of which have already formed the basis for regulatory filings and approvals in the third quarter (see page 10 for details on the R&D pipeline and regulatory milestones):

- Zelboraf for metastatic melanoma and companion diagnostic cobas BRAF Mutation Test approved and launched in the US (approval based on BRIM2 and BRIM3 studies)
- Tarceva approved in the EU for EGFR-mutated non-small cell lung cancer(based on EURTAC study)
- vismodegib filed in the US for treatment of basal cell carcinoma (supported by ERIVANCE study).
- primary objective achieved in phase III registration study with pertuzumab for HER2-positive metastatic breast cancer (CLEOPATRA)

Growth in sales of key medicines led by Latin America and Asia–Pacific

Sales by the Pharmaceuticals Division, excluding Tamiflu, grew 1% in the first nine months of 2011. Including Tamiflu, sales declined by 1% at constant exchange rates (-14% in Swiss francs; +4% in US dollars) to 24.4 billion Swiss francs. Sales reflected solid growth of most key medicines, including recently launched products. Negative impacts included expected decreases in sales of Avastin (due to uncertainty around the metastatic breast cancer indication in the US), Tamiflu, Bonviva/Boniva and CellCept, and sustained

[2] The percentage changes at constant exchange rates (CER) are calculated using simulations by reconsolidating both the 2011 and 2010 results at constant currencies (the average rates for the year ended 31 December 2010). This is the same concept that Roche previously labelled 'local currencies'.

competitive pressure on the NeoRecormon/Epogin franchise.

In the regions, growth of 1% in US pharmaceutical sales was driven mainly by demand for Lucentis, Rituxan and Actemra. Sales in Western Europe decreased by 4%, primarily due to government austerity measures. Excluding Tamiflu, sales in the International region grew 6%, helped by increasing demand for key products in certain Latin American and Asia–Pacific countries, notably China (+28%), Venezuela (+88%) and Brazil (+16%). A decrease of 2% in sales in Japan, excluding Tamiflu, was due primarily to ongoing effects following the disastrous earthquake in March.

Diagnostics business continues to outpace the market

Diagnostics Division sales continued to grow faster than the global *in vitro* diagnostics market, advancing 6% at constant exchange rates (-8% in Swiss francs, +11% in US dollars). Growth was led by Professional Diagnostics (+9%), fuelled by continued strong growth in immunoassays and solid instrument placements, and by Tissue Diagnostics (+15%). Sales grew in all regions, with the largest gains in Asia–Pacific (+17%). These reflect the strong overall demand for immunoassays and in particular the division's performance in China, where sales increased 25%. In the third quarter Roche Diagnostics launched 17 new products in key markets (see table on page 11).

Roche Group again recognised as global sustainability leader in healthcare

In September Roche was named Supersector Leader in Healthcare in the Dow Jones Sustainability Indexes (DJSI) for the third year in a row. This top ranking among the world's leading sustainability-driven healthcare companies is a reflection of Roche's commitment to its employees, communities and the environment, and positions Roche as a global leader in sustainable business practices.

Full-year outlook confirmed

Roche confirms its full-year outlook for 2011 on the basis of the positive nine-month sales performance. Barring unforeseen events, Group and Pharmaceuticals sales (excluding Tamiflu) are expected to grow at low single-digit rates at constant exchange rates, reflecting the impact of US healthcare reforms and European austerity measures. Pharmaceuticals sales are thus expected to grow in line with the market. In 2011 Diagnostics sales are again expected to grow significantly ahead of the market, driven by further rollouts of new products in all business areas. Thanks to ongoing cost savings and productivity gains, Roche is targeting Core EPS growth of around 10% at constant exchange rates for 2011, in spite of a more challenging environment and the introduction of an excise tax in the United States. Roche aims to grow the dividend in line with Core EPS growth, and will at least maintain last year's dividend in Swiss francs.

Pharmaceuticals — Herceptin, MabThera/Rituxan, Lucentis and Actemra lead sales growth

Top-selling pharmaceuticals and recent launches Jan.–Sept. 2011	Total		US		Western Europe		Japan		International**	
	CHF m	%*	CHF m	%*	CHF m	%*	CHF m	%*	CHF m	%*
MabThera/Rituxan	4,417	7	2,024	6	1,182	6	177	0	1,034	10
Avastin	3,942	-8	1,774	-15	1,092	-10	438	9	638	9
Herceptin	3,905	8	1,056	5	1,463	3	204	2	1,182	19
Lucentis	1,128	26	1,128	26	–	–	–	–	–	–
Pegasys	1,051	-5	222	-11	227	-5	69	-15	533	-2
Xeloda	1,001	6	377	12	201	-2	80	-6	343	7
Tarceva	921	6	347	6	283	-3	64	6	227	20
CellCept	770	-12	158	-13	220	-29	45	13	347	0
NeoRecormon/ Epogin	690	-22	–	–	240	-28	246	-23	204	-13
Bonviva/Boniva	551	-19	246	-28	170	-14	–	–	135	0
Recent launches										
Actemra/RoActemra	433	86	98	267	143	66	132	29	60	217
Mircera	237	45	–	–	133	14	31	–	73	59
Zelboraf	11	–	11	–	–	–	–	–	–	–

* At constant exchange rates versus YTD September 2010

**Asia–Pacific, CEMAI (Central and Eastern Europe, Middle East, Africa, Central Asia, Indian Subcontinent), Latin America, Canada, others

Sales performance of key pharmaceutical products

- **MabThera/Rituxan**, for non-Hodgkin's lymphoma (NHL), chronic lymphocytic leukemia (CLL) and rheumatoid arthritis (RA): Sustained growth in the oncology segment was driven by continued strong uptake of the new first-line maintenance indication in follicular lymphoma (a type of NHL) in Europe and the US, and by further uptake in CLL. Growth in the International region, including gains in key emerging markets, was driven by uptake in NHL indications. Growth in the RA segment is being fuelled by increased use in patients with an inadequate response to tumour necrosis factor inhibitors and shortened repeat treatment intervals.
- **Herceptin**, for HER2-positive breast cancer and HER2-positive metastatic (advanced) stomach cancer: Sustained double-digit sales increases were recorded in the International region, especially Latin America and Asia–Pacific, with single-digit growth in the US, Western Europe and Japan. Sales are being driven by expanded access in developing countries, increased HER2 testing and continued uptake in HER2-positive gastric cancer.
- **Lucentis**, for wet age-related macular degeneration (AMD) and macular edema following retinal vein

occlusion (RVO): US sales continue to grow strongly, driven by growth of the AMD market and the new RVO indication. Publication of one-year results from the Comparisons of Age-related macular degeneration Treatments Trial (CATT), which compared Lucentis with off-label Avastin in patients with wet AMD, has had a limited impact on US sales growth.

- **Actemra/RoActemra**, for rheumatoid arthritis and systemic juvenile idiopathic arthritis: Continued uptake was seen in all approved indications. The US, where Actemra continues to gain market share, remains the largest source of growth, with strong contributions also coming from Western Europe, Japan and Latin America. Marketing and reimbursement approvals in additional countries continue to expand patient access to Actemra/RoActemra.
- **Avastin**, for advanced colorectal, breast, lung and kidney cancer, and for relapsed glioblastoma (a type of brain tumour): The expected decline in US sales was mainly due to regulatory and reimbursement uncertainty regarding the metastatic breast cancer indication. Market penetration of Avastin in lung cancer grew slightly and remained stable for all other indications. Lower sales in Europe reflect austerity measures affecting all products and lower use in breast cancer. Good growth in the International region (+9%) reflects strong uptake of Avastin in its colorectal cancer indications, including very good market uptake in China since the medicine's launch there last October.
- **Pegasys**, for hepatitis B and C: While nine-month sales declined 5% overall, renewed sales growth was recorded in the third quarter in the US (+15% vs Q3 2010), where two new direct-acting hepatitis C medicines were launched in mid-2011. The new medicines are designed to be given with a pegylated interferon and ribavirin (a regimen known as triple combination therapy). As the leading pegylated interferon medication, Pegasys is well positioned to be the foundation for triple combination therapy. In Europe and elsewhere patients with hepatitis C are still delaying the start of treatment in anticipation of the availability of triple combination therapy. Under a strategic agreement, Roche and Merck & Co. have initiated the first of a series of clinical trials to examine novel combinations of marketed and investigational medicines for chronic hepatitis C. In addition, a phase II study (DYNAMO 1) evaluating the combination of mericitabine, Merck's Victrelis, Pegasys and ribavirin in patients who have not responded to prior therapy, is scheduled to begin shortly.

Diagnostics — strong growth in immunoassays and advanced tissue staining

Sales January–September 2011	In millions of CHF	% change in CHF	% change at CER*	As % of sales
Diagnostics Division	7,095	-8	6	100
- Professional Diagnostics	3,430	-5	9	48
- Diabetes Care	1,938	-12	1	27
- Molecular Diagnostics	801	-11	3	11
- Applied Science	544	-16	-2	8
- Tissue Diagnostics	382	-3	15	6
Sales by region				
- Europe, Middle East and Africa	3,546	-10	2	50
- North America	1,759	-13	4	25
- Asia–Pacific	926	3	17	13
- Latin America	489	-1	15	7
- Japan	375	-2	6	5

* Constant exchange rates versus YTD September 2010

Major sales drivers by business area

- **Professional Diagnostics:** Sales were driven by strong, above-market growth in immunoassays (+13%) and clinical chemistry (+6%), the unit's largest businesses, and in coagulation monitoring (+14%).
- **Diabetes Care:** Sales were driven by the new generation of Accu-Chek blood glucose (bG) meters and Accu-Chek Combo, a combined insulin pump and bG meter. The FDA's approval of the Accu-Chek Aviva Plus test strip with maltose-independent chemistry marked the first step in bringing this portfolio to the US market. The test strips were also approved in Japan for the Accu-Chek Aviva and Accu-Chek Compact.
- **Molecular Diagnostics**: Roche's HIV and HBV viral load tests (+3%) remained the main sales drivers. Uptake of the HPV test was positive; Roche won a key tender to screen women for cervical cancer in Sweden, the first country in Europe to pilot HPV first-line testing. Roche also signed a contract with LabCorp to make the recently approved BRAF melanoma test available for patient testing in the US.
- **Applied Science:** Sales continued to be impacted by the year-on-year decline in H1N1 influenza testing, increasing competition in gene sequencing, and flat research funding. The Custom Biotech business, which offers specialty biochemicals for industrial use, continued its healthy growth (+ 12%).
- **Tissue Diagnostics**: Growth substantially ahead of the market was again driven by the advanced tissue staining portfolio (+15%). Roche completed its acquisition of mtm laboratories, including mtm's proprietary antibodies for cervical cancer detection. Tissue Diagnostics continued to launch new antibodies, bringing the total for the first nine months to 25.

Product pipeline — focus on personalised healthcare delivering results

In the third quarter, two Roche medicines and two diagnostic tests were approved for targeted cancer therapy, demonstrating that Roche is delivering on its personalised healthcare strategy:

- Zelboraf (vemurafenib) for the treatment of inoperable or metastatic melanoma approved in the US (August), cobas BRAF Mutation Test, to identify patients eligible for treatment with Zelboraf, approved in the US and received CE mark[3] (August)
- Tarceva (erlotinib) as first-line therapy for patients with a distinct form of non-small cell lung cancer (NSCLC with epidermal growth factor receptor-activating mutations) approved in the EU (August)
- KRAS Mutation Test for use in patients with colorectal cancer to predict non-response to certain antibody therapies received CE mark (July)

In addition, the Group passed further important regulatory milestones with existing and investigational medicines. In September the Japanese authorities approved Avastin for the treatment of inoperable or recurrent breast cancer, while the EU's Committee for Medicinal Products for Human Use (CHMP) recommended approval of Avastin as front-line therapy for ovarian cancer. Roche filed an additional EU marketing application in August seeking approval of Avastin for use in relapsed ovarian cancer and plans to file a marketing application for this indication in the US in the first quarter of 2012. Also in September, Genentech filed a US marketing application for vismodegib (RG3616) for the treatment of advanced basal cell carcinoma.

Positive clinical trial results for key investigational new medicines

In the third quarter a phase III registration study with the investigational medicine pertuzumab in HER2-positive breast cancer (CLEOPATRA) achieved its primary objective, and promising phase II proof-of-concept data (TDM4450g) for the HER2-positive breast cancer therapy trastuzumab emtansine (T-DM1) were presented at the European Multidisciplinary Cancer Congress in September. Positive results from a phase II proof-of-concept study with the asthma compound lebrikizumab (MILLY) were presented at the European Respiratory Society Congress, also in September. The lebrikizumab data were also published in a major US medical journal; phase III testing of the compound is planned to start in early 2012.

The third quarter also saw clinical data read-outs from programs designed to develop key marketed medicines in new indications or dosage forms. In July Chugai announced positive results from a phase III trial with a new subcutaneous formulation of Actemra in patients with rheumatoid arthritis, showing non-inferiority of efficacy of the new formulation compared with the current intravenous formulation. In

[3] Certification that an *in vitro* diagnostic product complies with all requirements for use in the European Union.

September Roche reported positive phase III results for Avastin in combination with pemetrexed chemotherapy as maintenance treatment in advanced non-squamous non-small cell lung cancer (AVAPERL). In early October AVEREL, a phase III study evaluating the addition of Avastin to Herceptin and chemotherapy for women with locally recurrent or metastatic HER2-positive breast cancer, did not achieve statistical significance in improving progression-free survival (PFS), as assessed by study investigators. An Independent Review Committee assessment of PFS was significant but is unlikely to be sufficient to meet regulatory approval requirements. Roche has investigational medicines for this aggressive disease in late-stage development, including pertuzumab and T–DM1 (see above).

Pharmaceuticals clinical development portfolio (phases I to III and registration) as at 30 September 2011:

- 73 new molecular entities and 41 additional indications
- In the third quarter of 2011 seven projects entered phase I, two entered phase II and three entered phase III
- One phase II project and one phase III project (Actemra/RoActemra in ankylosing spondylitis) were discontinued in the third quarter

Full details of the Group's pharmaceutical R&D pipeline are available at www.roche.com.

About Roche

Headquartered in Basel, Switzerland, Roche is a leader in research-focused healthcare with combined strengths in pharmaceuticals and diagnostics. Roche is the world's largest biotech company with truly differentiated medicines in oncology, virology, inflammation, metabolism and CNS. Roche is also the world leader in in-vitro diagnostics, tissue-based cancer diagnostics and a pioneer in diabetes management. Roche's personalised healthcare strategy aims at providing medicines and diagnostic tools that enable tangible improvements in the health, quality of life and survival of patients. In 2010, Roche had over 80,000 employees worldwide and invested over 9 billion Swiss francs in R&D (core basis). The Group posted sales of 47.5 billion Swiss francs. Genentech, United States, is a wholly owned member of the Roche Group. Roche has a majority stake in Chugai Pharmaceutical, Japan. For more information: www.roche.com

Additional information

- Investor Update including a full set of tables: http://www.roche.com/inv-update-2011-10-13.htm
- Half Year Report 2011: www.roche.com/annual_reports.htm
- Roche Pharmaceuticals pipeline: www.roche.com/pipeline.htm
- Roche Finance Info System: rofis.roche.com/dynasight/rofis.html

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1. Pharmaceuticals Division – major clinical trials in Q3 2011

Product	Indication	Trial (phase)	Outcome	Aim
Actemra (Japan)	rheumatoid arthritis	double-blind, randomised, parallel group study (III)	non-inferiority of efficacy of subcutaneous formulation versus intravenous formulation	registration, new dosage form
Avastin + Herceptin	HER2-positive metastatic breast cancer	AVEREL (III)	study did not meet protocol-specified primary endpoint	registration, new indication
dalcetrapib	patients with coronary heart disease (CHD), or CHD risk equivalents	dal-PLAQUE (IIb)	data suggest possible beneficial vascular effects, generally well tolerated.	exploratory (safety, efficacy)
dalcetrapib	patients with coronary heart disease (CHD), or CHD risk equivalents	dal-VESSEL (IIb)	endothelial function preserved, no change in blood pressure, generally well tolerated	exploratory (safety, efficacy)
Lucentis	wet age-related macular degeneration, comparing alternative dosing regimens with monthly Lucentis	HARBOR (III)	efficacy data do not support initiation of further clinical high-dose studies, 0.5 mg PRN dosing to be discussed with FDA	registration (new dosing regimen)
pertuzumab	HER2-positive metastatic breast cancer, combination with Herceptin and docetaxel	CLEOPATRA (III)	significantly improved progression-free survival	registration

2. Pharmaceuticals Division — Major regulatory approvals in Q3 2011

Product	Clinical data supporting filing	Indication or dosage form	Country
Avastin	International phase III data, Japanese phase II data	inoperable or recurrent breast cancer, first-line treatment	Japan
RoActemra	TENDER	systemic juvenile idiopathic arthritis	EU
Pegasys	Japanese phase II/III data	chronic hepatitis B	Japan
Pegasys	4 clinical studies	Pegasys ProClick Disposable Auto Injector	EU, US
Tarceva	EURTAC, published clinical experience	metastatic non-small cell lung cancer with epidermal growth factor receptor-activating mutations, first-line treatment	EU
Tarceva	PA 3, Japanese phase II data	pancreatic cancer not amenable to curative resection, combination with gemcitabine	Japan
Zelboraf	BRIM2, BRIM3	BRAF V600E mutation-positive inoperable or metastatic melanoma, as determined by an FDA-approved test	USA

3. Pharmaceuticals Division — Major regulatory filings in Q3 2011

Product	Clinical data supporting filing	Indication	Country
Avastin	OCEANS (AVF4095)	ovarian cancer, relapsed	EU
Tarceva	EURTAC	metastatic non-small cell lung cancer with epidermal growth factor receptor-activating mutations, first-line treatment	Switzerland
vismodegib	ERIVANCE BCC (SHH4476G)	advanced basal cell carcinoma where surgery is considered inappropriate	USA

4. Diagnostics Division — Major launches in Q3 2011

Business area	Product	Market	Month
Professional Diagnostics	**cobas c 702**: clinical chemistry module for high-volume laboratories (throughput: 2,000 tests/hour), part of the cobas 8000 modular analyser series	US	July
	PTH (1-84) immunoassay: monitoring of parathyroid hormone levels in patients with chronic kidney disease, to help physicians better manage bone metabolism disorders	EU	July
Molecular Diagnostics	**Two tests for personalised cancer treatment**: - **BRAF V600 Mutation**: detects a BRAF gene mutation in melanoma tumours, to identify patients eligible for treatment with Zelboraf	EU, US	August

	- **KRAS Mutation**: detects mutations of the KRAS gene in colorectal cancer tumours, to help guide therapy selection	EU	July
Applied Science	**Cedex Bio**: bioprocess analyser for biotherapeutics manufacturing, measures 14 different parameters	WW	Sept.
Tissue Diagnostics	**Eleven immunohistochemistry (IHC) assays** including: - **anti-H. pylori**: first FDA-cleared antibody to detect *helicobacter pylori*, a precursor to gastritis and ulcers - **anti-MLH-1**: supports the diagnosis of colorectal cancer - **anti-BCL-2**: helps identify follicular and large cell lymphomas	 US WW WW	 Sept. July Sept.
	Ultimate Reagent Access: expedited slide tissue processing, enabling greater throughput and reduced test time in the laboratory	EU, APAC, LATAM	Sept.

APAC = Asia–Pacific, EU = European Union, LATAM = Latin America, US = United States, WW = worldwide

5. Quarterly sales by Division in 2010 and 2011, including/excluding Tamiflu

CHF millions	Q3 2010	Q4 2010	Q1 2011	Q2 2011	Q3 2011
Pharmaceuticals Division	**9,009**	**8,663**	**8,712**	**8,103**	**7,582**
Excluding Tamiflu	8,911	8,598	8,460	8,093	7,543
United States	**3,506**	**3,193**	**3,322**	**2,963**	**2,819**
Excluding Tamiflu	3,504	3,153	3,148	2,959	2,827
Western Europe	**2,251**	**2,172**	**2,209**	**2,090**	**1,911**
Excluding Tamiflu	2,251	2,173	2,201	2,089	1,899
Japan	**1,076**	**1,182**	**903**	**928**	**881**
Excluding Tamiflu	1,030	1,154	855	925	863
International*	**2,176**	**2,116**	**2,278**	**2,122**	**1,971**
Excluding Tamiflu	2,126	2,118	2,256	2,120	1,954
Diagnostics Division	**2,482**	**2,683**	**2,408**	**2,448**	**2,239**
Roche Group	**11,491**	**11,346**	**11,120**	**10,551**	**9,821**
Excluding Tamiflu	11,393	11,281	10,868	10,541	9,782

*Asia–Pacific, CEMAI (Central and Eastern Europe, Middle East, Africa, Central Asia, Indian Subcontinent), Latin America, Canada, Others

6. Quarterly constant exchange rate sales growth by Division in 2010 and 2011, including/excluding Tamiflu

	Q4 2010 vs. Q4 2009	Q1 2011 vs. Q1 2010	Q2 2011 vs. Q2 2010	Q3 2011 vs. Q3 2010
Pharmaceuticals Division	**-8**	**-2**	**-1**	**0**
Excluding Tamiflu	4	1	1	0
United States	**-8**	**2**	**1**	**1**
Excluding Tamiflu	2	2	2	1
Western Europe	**-13**	**-4**	**-4**	**-3**
Excluding Tamiflu	-2	-4	-4	-4
Japan	**-11**	**-7**	**-3**	**-7**
Excluding Tamiflu	7	1	-2	-5
International*	**-1**	**-3**	**0**	**5**
Excluding Tamiflu	13	6	6	6
Diagnostics Division	**6**	**6**	**5**	**6**
Roche Group	**-5**	**0**	**0**	**1**
Excluding Tamiflu	4	2	2	2

*Asia–Pacific, CEMAI (Central and Eastern Europe, Middle East, Africa, Central Asia, Indian Subcontinent), Latin America, Canada, Others

7. Top 20 Pharmaceuticals Division product sales and constant exchange rate growth YTD Sep 2011 vs. YTD Sep 2010: US, Western Europe, Japan and International

	Total		United States		Western Europe		Japan		International	
	CHF m	%	CHF m	%	CHF m	%	CHF m	%	CHF m	%
MabThera/Rituxan	4,417	7%	2,024	6%	1,182	6%	177	0%	1,034	10%
Avastin	3,942	-8%	1,774	-15%	1,092	-10%	438	9%	638	9%
Herceptin	3,905	8%	1,056	5%	1,463	3%	204	2%	1,182	19%
Lucentis	1,128	26%	1,128	26%	-	-	-	-	-	-
Pegasys	1,051	-5%	222	-11%	227	-5%	69	-15%	533	-2%
Xeloda	1,001	6%	377	12%	201	-2%	80	-6%	343	7%
Tarceva	921	6%	347	6%	283	-3%	64	6%	227	20%
CellCept	770	-12%	158	-13%	220	-29%	45	13%	347	0%
NeoRecormon/Epogin	690	-22%	-	-	240	-28%	246	-23%	204	-13%
Bonviva/Boniva	551	-19%	246	-28%	170	-14%	-	-	135	0%
Xolair	446	10%	446	10%	-	-	-	-	-	-
Actemra/RoActemra	433	86%	98	267%	143	66%	132	29%	60	217%
Valcyte/Cymevene	425	9%	192	2%	120	6%	-	-	113	28%
Pulmozyme	358	9%	208	12%	76	4%	-	-	74	6%
Activase/TNKase	331	15%	300	16%	-	-	-	-	31	7%
Tamiflu	301	-57%	170	2%	21	625%	69	-60%	41	-89%
Nutropin	242	-6%	235	-5%	-	-	-	-	7	-7%
Mircera	237	45%	-	-	133	14%	31	-	73	59%
Madopar	222	8%	-	-	70	0%	16	3%	136	13%
Neutrogin	200	-13%	-	-	-	-	200	-13%	-	-

8. Top 20 Pharmaceuticals Division quarterly product sales and quarterly constant exchange rate sales growth

	Q3 2010	Q3 2010 vs. Q3 2009	Q4 2010	Q4 2010 vs. Q4 2009	Q1 2011	Q1 2011 vs. Q1 2010	Q2 2011	Q2 2011 vs. Q2 2010	Q3 2011	Q3 2011 vs. Q3 2010
MabThera/Rituxan	1,520	6%	1,535	10%	1,556	7%	1,500	6%	1,361	7%
Avastin	1,608	7%	1,460	2%	1,417	-6%	1,309	-9%	1,216	-10%
Herceptin	1,357	8%	1,266	5%	1,386	8%	1,330	12%	1,189	4%
Lucentis	384	34%	377	20%	392	35%	377	29%	359	17%
Pegasys	384	-8%	392	9%	346	-15%	349	-7%	356	6%
Xeloda	361	16%	333	14%	342	7%	326	2%	333	10%
Tarceva	331	9%	320	0%	317	8%	297	1%	307	10%
CellCept	299	-14%	289	5%	280	-14%	258	-13%	232	-9%
NeoRecormon/Epogin	312	-16%	296	-18%	246	-22%	247	-18%	197	-28%
Bonviva/Boniva	246	2%	223	-13%	212	-15%	182	-19%	157	-24%
Xolair	167	10%	150	5%	149	13%	151	9%	146	9%
Actemra/RoActemra	107	176%	135	158%	129	111%	148	90%	156	69%
Valcyte/Cymevene	157	11%	152	14%	145	8%	137	10%	143	8%
Pulmozyme	121	2%	128	5%	131	8%	116	9%	111	11%
Activase/TNKase	119	15%	114	-3%	122	23%	109	18%	100	5%
Tamiflu	98	-90%	65	-94%	252	-47%	10	-88%	39	-51%
Nutropin	117	19%	95	11%	87	8%	82	1%	73	-21%
Mircera	61	37%	70	37%	70	30%	68	21%	99	82%
Madopar	77	11%	77	7%	75	8%	75	7%	72	8%
Neutrogin	82	-23%	82	-18%	61	-24%	74	-4%	65	-11%

9. Top 20 Pharmaceuticals Division quarterly product sales and quarterly constant exchange rate sales growth United States

	Q3 2010	Q3 2010 vs. Q3 2009	Q4 2010	Q4 2010 vs. Q4 2009	Q1 2011	Q1 2011 vs. Q1 2010	Q2 2011	Q2 2011 vs. Q2 2010	Q3 2011	Q3 2011 vs. Q3 2010
MabThera/Rituxan	729	2%	712	6%	713	5%	690	7%	621	7%
Avastin	802	-3%	656	-10%	648	-14%	590	-15%	536	-16%
Herceptin	398	4%	367	7%	374	3%	352	7%	330	4%
Lucentis	384	34%	377	20%	392	35%	377	29%	359	17%
Pegasys	92	-12%	89	6%	65	-28%	70	-17%	87	15%
Xeloda	136	8%	124	10%	123	13%	119	2%	135	23%
Tarceva	138	13%	127	-6%	118	10%	110	1%	119	7%
CellCept	62	-47%	54	40%	54	-27%	52	-12%	52	2%
NeoRecormon/Epogin	-	-	-	-	-	-	-	-	-	-
Bonviva/Boniva	132	2%	110	-21%	104	-19%	75	-31%	67	-36%
Xolair	167	10%	150	5%	149	13%	151	9%	146	9%
Actemra/RoActemra	18	-	26	-	27	548%	34	356%	37	153%
Valcyte/Cymevene	86	13%	74	18%	68	8%	59	3%	65	-4%
Pulmozyme	73	-1%	76	2%	75	11%	66	11%	67	14%
Activase/TNKase	109	16%	101	-3%	111	24%	99	20%	90	5%
Tamiflu	2	-97%	40	-89%	174	15%	4	-56%	-8	-
Nutropin	114	20%	92	11%	85	8%	79	1%	71	-21%
Mircera	-	-	-	-	-	-	-	-	-	-
Madopar	-	-	-	-	-	-	-	-	-	-
Neutrogin	-	-	-	-	-	-	-	-	-	-

10. Top 20 Pharmaceuticals Division quarterly product sales and quarterly constant exchange rate sales growth Western Europe

	Q3 2010	Q3 2010 vs. Q3 2009	Q4 2010	Q4 2010 vs. Q4 2009	Q1 2011	Q1 2011 vs. Q1 2010	Q2 2011	Q2 2011 vs. Q2 2010	Q3 2011	Q3 2011 vs. Q3 2010
MabThera/Rituxan	394	5%	381	5%	411	5%	400	6%	371	8%
Avastin	423	4%	393	-3%	393	-8%	363	-12%	336	-9%
Herceptin	506	4%	472	1%	513	1%	491	5%	459	4%
Lucentis	-	-	-	-	-	-	-	-	-	-
Pegasys	78	-4%	83	2%	87	-2%	79	-3%	61	-10%
Xeloda	73	1%	73	7%	69	-4%	69	-1%	63	-1%
Tarceva	98	-8%	102	-5%	101	-2%	91	-12%	91	6%
CellCept	108	-2%	103	-7%	83	-24%	76	-27%	61	-35%
NeoRecormon/Epogin	111	-26%	97	-30%	87	-30%	81	-28%	72	-26%
Bonviva/Boniva	68	0%	70	-2%	63	-10%	60	-12%	47	-21%
Xolair	-	-	-	-	-	-	-	-	-	-
Actemra/RoActemra	37	210%	39	114%	45	88%	49	67%	49	51%
Valcyte/Cymevene	41	10%	41	7%	41	1%	41	11%	38	8%
Pulmozyme	26	-1%	26	1%	27	1%	25	6%	24	5%
Activase/TNKase	-	-	-	-	-	-	-	-	-	-
Tamiflu	-	-100%	-1	-	8	169%	1	-	12	4017%
Nutropin	-	-	-	-	-	-	-	-	-	-
Mircera	43	18%	47	20%	45	11%	45	16%	43	15%
Madopar	25	-3%	27	4%	24	-2%	23	-5%	23	6%
Neutrogin	-	-	-	-	-	-	-	-	-	-

11. Top 20 Pharmaceuticals Division quarterly product sales and quarterly constant exchange rate sales growth Japan

	Q3 2010	Q3 2010 vs. Q3 2009	Q4 2010	Q4 2010 vs. Q4 2009	Q1 2011	Q1 2011 vs. Q1 2010	Q2 2011	Q2 2011 vs. Q2 2010	Q3 2011	Q3 2011 vs. Q3 2010
MabThera/Rituxan	70	8%	81	16%	57	9%	58	-5%	62	-1%
Avastin	162	51%	187	50%	143	22%	149	7%	146	2%
Herceptin	74	-15%	82	-10%	64	-3%	90	30%	50	-23%
Lucentis	-	-	-	-	-	-	-	-	-	-
Pegasys	31	-4%	36	5%	25	-2%	24	-12%	20	-28%
Xeloda	33	64%	35	33%	27	2%	27	-9%	26	-9%
Tarceva	24	45%	29	45%	20	22%	22	0%	22	2%
CellCept	15	12%	18	25%	14	16%	15	9%	16	15%
NeoRecormon/Epogin	123	-10%	128	-11%	85	-15%	98	-11%	63	-42%
Bonviva/Boniva	-	-	-	-	-	-	-	-	-	-
Xolair	-	-	-	-	-	-	-	-	-	-
Actemra/RoActemra	43	60%	55	74%	40	35%	44	27%	48	25%
Valcyte/Cymevene	-	-	-	-	-	-	-	-	-	-
Pulmozyme	-	-	-	-	-	-	-	-	-	-
Activase/TNKase	-	-	-	-	-	-	-	-	-	-
Tamiflu	46	-88%	28	-89%	48	-61%	3	-68%	18	-55%
Nutropin	-	-	-	-	-	-	-	-	-	-
Mircera	-	-	-	-	-	-	-	-	31	-
Madopar	6	2%	7	5%	5	10%	6	1%	5	-2%
Neutrogin	82	-23%	82	-18%	61	-24%	74	-4%	65	-11%

12. Top 20 Pharmaceuticals Division quarterly product sales and quarterly constant exchange rate sales growth International

	Q3 2010	Q3 2010 vs. Q3 2009	Q4 2010	Q4 2010 vs. Q4 2009	Q1 2011	Q1 2011 vs. Q1 2010	Q2 2011	Q2 2011 vs. Q2 2010	Q3 2011	Q3 2011 vs. Q3 2010
MabThera/Rituxan	327	16%	361	25%	375	15%	352	5%	307	9%
Avastin	221	34%	224	32%	233	16%	207	8%	198	5%
Herceptin	379	29%	345	13%	435	25%	397	23%	350	9%
Lucentis	-	-	-	-	-	-	-	-	-	-
Pegasys	183	-9%	184	16%	169	-16%	176	-3%	188	15%
Xeloda	119	28%	101	21%	123	10%	111	5%	109	6%
Tarceva	71	26%	62	10%	78	16%	74	22%	75	23%
CellCept	114	8%	114	3%	129	-1%	115	-5%	103	5%
NeoRecormon/Epogin	78	-4%	71	-7%	74	-17%	68	-13%	62	-8%
Bonviva/Boniva	46	6%	43	-6%	45	-9%	47	2%	43	7%
Xolair	-	-	-	-	-	-	-	-	-	-
Actemra/RoActemra	9	900%	15	458%	17	338%	21	203%	22	177%
Valcyte/Cymevene	30	8%	37	13%	36	18%	37	24%	40	42%
Pulmozyme	22	18%	26	22%	29	5%	25	3%	20	12%
Activase/TNKase	10	2%	13	5%	11	13%	10	1%	10	7%
Tamiflu	50	-70%	-2	-99%	22	-90%	2	-97%	17	-62%
Nutropin	3	-16%	3	-5%	2	-15%	3	-7%	2	1%
Mircera	18	138%	23	94%	25	86%	23	32%	25	65%
Madopar	46	23%	43	9%	46	14%	46	15%	44	10%
Neutrogin	-	-	-	-	-	-	-	-	-	-