Experience patients telling their stories.
Scan the marked images with the Xtend app to watch the videos.

Roche in Brief 2019
Bringing our products to patients—we are committed to bringing our medicines rapidly and sustainably to those who need them. Everywhere

We are open to new ideas.

Developing cures for patients—as a science-driven organisation we strive towards converting today’s knowledge into tomorrow’s therapies. Every day

We are pushing boundaries.

Millions of people, like Adeline, have hepatitis B and we are developing medicines to help them. Everywhere

Bringing our products to patients—we are committed to bringing our medicines rapidly and sustainably to those who need them. We are open to new ideas.

Working in collaboration with healthcare systems and our partners is key to resolving critical access barriers to therapies.
We believe it’s urgent to deliver medical solutions right now—even as we develop innovations for the future. We are passionate about transforming patients’ lives. We are courageous in both decision and action. And we believe that good business means a better world.

That is why we come to work each day. We commit ourselves to scientific rigour, unassailable ethics, and access to medical innovations for all. We do this today to build a better tomorrow.

We are proud of who we are, what we do, and how we do it. We are many, working as one across functions, across companies, and across the world.

We are Roche.
I moved to Basel five years ago with my husband and three sons. Just a few months later I was diagnosed with HER2-positive breast cancer. Fortunately, I received timely treatment with two of Roche’s breast cancer medicines in my native Holland. For that, I had to leave my young boys and husband behind here in what was a new place for them.

“I feel that I have been able to strengthen the patient’s position as a stakeholder.”

Ike de Rooij-van Haaren, Consultant, Oman

I made up my mind while still undergoing treatment that I wanted to give something back to Roche. The company had kindly allowed me to participate in a study of one of its medicines and this inspired me greatly. I mentioned it to a friend who worked at Roche and he came back to me with some details about a project aimed at putting a patient in one of the brand teams to see what effect that would have and if it would change the decision-making within the team.

I was nervous at first, but decided to take the plunge. I realised that I just had to be myself and share my experiences. It took a couple of meetings with the brand team to get used to each other. The team I got to work with was working on the same breast cancer medicine that I had been treated with. They were curious to hear my experience and therefore I felt confident to share my opinions. From the beginning I could see the impact of having the actual patient’s voice in the room. I was never interested in the numbers and always what it meant for individual patients such as myself.

The project itself was meant to last three months. But the team realised they could benefit more from my journey and real-life experiences as a patient. Therefore, I signed a patient consultant contract and continued to work with Roche. It has been more than three years now.

I now live in the Middle East and this sometimes poses a logistical challenge. Technology helps, but I try to attend meetings in person when possible. I work with the broader HER2 franchise team these days and over the years have been involved in prelaunch, launch and postlaunch activities. My role is to give the patient perspective at any stage of the medicine’s life cycle. I am also a member of a committee set up by Roche, where, along with other patients, we review topics that teams request advice on, such as patient information materials and clinical trials.

I feel that I have been able to strengthen the patient’s position as a stakeholder. It has been difficult to engage with patients at times and this makes it hard to understand their real needs. Now, with efforts such as the one I am involved in, business teams are really looking at ways to give this important stakeholder a stronger voice in the work they do.
Key highlights 2019

Supporting continued growth
With CHF 5.4 billion incremental sales, medicines launched since 2012 drive growth and rejuvenation of our product portfolio.

Treating rare cancer
Rozlytrek approved to treat rare form of lung cancer that occurs in 1–2% of patients only.

Launching cobas pro
Next-generation integrated Serum Work Area solutions improve efficiency and shorten results delivery.

Contributing to sustainability
Roche ranked amongst most sustainable healthcare companies in the Dow Jones Sustainability Indices.

Key figures 2019

CHF 61.5 billion Group sales (+9%*)

CHF 22.5 billion core operating profit (+11%)

CHF 9.00 dividend

CHF 11.7 billion R&D core investments (+6%)

37,383,000 people worldwide were treated with our medicines

97,735 employees worldwide**

---

* All growth rates in this report are at constant exchange rates (CER; average 2018).
** Number of employees expressed in full-time equivalents on 31.12.2019
**Diagnostics performance**

**CHF 12,950 million**
Diagnostics sales  +3%

- **+2%** Europe, Middle East and Africa
- **+12%** Latin America
- **+6%** Asia-Pacific
- **-2%** Japan
- **0%** North America

**Top-selling product portfolios in 2019** (CHF millions)

- 4,400 +6% cobas Immunodiagnostics
- 1,821 +1% cobas Clinical chemistry
- 856 +1% Ventana Advanced staining

**Pharmaceuticals performance**

**CHF 48,516 million**
Pharmaceuticals sales  +11%

- **+1%** Europe
- **+9%** Japan
- **+13%** US
- **+15%** International

**Key growth drivers in 2019** (CHF millions)

- 3,708 +57% Ocrevus Neuroscience
- 1,875 +143% Tecentriq Oncology
- 1,380 >500% Hemlibra Haemophilia

*All growth rates in this report are at constant exchange rates (CER; average 2018).
Science and innovation

Our ability to capture what makes each patient unique has improved significantly and is now paving the way for the next stage of personalised healthcare.

We convert knowledge into therapies.

Patient benefit at the centre

The data age in healthcare is rapidly becoming a reality and is here to stay. It is driven by continually improving our ability to digitally collect, aggregate, curate and make sense of vast quantities of diverse patient data. The massive generation of data does not add any value as such. It is the ‘translation’, or processing, of this data deluge into meaningful data on a scale that, with the help of sophisticated analytics, will ultimately help provide actionable and meaningful information across the continuum of care—for researchers, physicians and, most importantly, the individual patients with their unique characteristics.

To be successful in this field, it is indispensable to engage and create synergies with strong, innovative partners, while leveraging Roche’s own deep in-house expertise in diagnostics and pharmaceuticals. This will allow the company to achieve progress throughout the entire value chain, from the development to the delivery of a medicine and from facilitating discoveries in the lab and enhancing clinical trial design to accelerating the approval of targeted therapies for the benefit of patients.

Our ability to mine and analyse unprecedented quantities of data in new ways has matured to a point where it can now be used to support the development and delivery of the right treatment to the right patient at the right time. From interlinking genomic information with real-world data (e.g., in oncology) to the use of wearables and sensors that enable a much more granular view of a person’s disease course including a greater ability to measure clinical change (e.g., in neuroscience), we are leveraging an array of powerful partnerships and new technologies to seize these opportunities. With our pioneering in-house expertise in pharmaceuticals and diagnostics, Roche is at the forefront of this effort to fulfil the promise of truly personalised healthcare (PHC).
Innovating clinical trial design

Meaningful data at scale from a real-world setting offer a tremendous opportunity to improve how we conduct clinical trials by making them leaner and more efficient. There are already realistic scenarios in which electronic health records can provide advantages over and above the classic control arm of randomised, placebo-controlled clinical trials. This is because real-world data can be used to create an ‘external’ control arm that replaces the regular standard-of-care arm in conventional trials or when it is not possible to do a control arm, such as for rare diseases, and when recruitment takes much longer due to the low prevalence of the disease.

As a result, this enables more trial participants to receive the experimental medicine, which speeds up the recruitment process, lowers trial costs and enables all of the participants to be treated with a potentially more effective medicine than the historical standard.

Innovative approaches in R&D and expedited review procedures make new medicines available for patients much earlier. (* normal procedure)

Pharmaceuticals clinical pipeline

31 FDA breakthrough therapy designations granted since 2013.

<table>
<thead>
<tr>
<th>Disease Area</th>
<th>Phase I</th>
<th>Phase II</th>
<th>Phase III</th>
<th>Registration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oncology</td>
<td></td>
<td></td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Inflammation/Immunology</td>
<td></td>
<td></td>
<td>20</td>
<td>1</td>
</tr>
<tr>
<td>Neuroscience</td>
<td></td>
<td></td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>Infectious diseases</td>
<td></td>
<td></td>
<td>4</td>
<td>1</td>
</tr>
<tr>
<td>Ophthalmology</td>
<td></td>
<td></td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Spark Therapeutics</td>
<td></td>
<td></td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Others</td>
<td></td>
<td></td>
<td>4</td>
<td></td>
</tr>
</tbody>
</table>

Phase duration (years)

- Fast track: 5.8
- Accelerated review: 3.8
- Breakthrough therapy: 3.6

Our pipeline of 72 new molecular entities covers a broad range of diseases, and highly innovative technologies are applied to create and produce the active molecules.
Our responsibility

We are committed to delivering sustainable value to all stakeholders and society at large.

We are acting now.

Our impact on society

Innovating for patients
We are committed to developing medicines and diagnostics that significantly improve people’s lives, and to delivering rapid, broad, sustainable patient access to our products.

Being a trustworthy partner
We are committed to establishing mutually beneficial, long-term relationships with our partners.

Providing a great workplace
We are committed to providing a work environment where our employees are encouraged to build their careers and pursue their passions.

Protecting the environment
We are committed to minimising our environmental impact in our operations and in the use of our products.
Create value for our stakeholders

Innovating for patients
Data-driven healthcare has the potential to transform health systems, improve outcomes for patients and make healthcare more sustainable. To unlock the potential of health data, it needs to be made accessible and shared. We are collaborating with leading companies in the field of genomics and real-world data such as Foundation Medicine and Flatiron Health, and building more strategic partnerships to drive the development of new targeted diagnostics and therapies. Roche is also driving cross-sector collaboration between industry, academia and research organisations. People from diverse backgrounds come together, share ideas and high-quality data, and work on accelerating innovation in the area of healthcare.

Being a trustworthy partner
In the long run, we can only be successful as a business if we act with integrity, trust and respect in our everyday operations. Roche’s Global Procurement organisation has developed a method for identifying the risk of human rights violations in our global supply base. We perform site visits to make sure that those suppliers who had been identified of being at risk protect human rights. In 2019, we had discovered 102 human rights and labour issues, none of them were critical. We did not find any evidence of child labour or modern slavery.

Providing a great workplace
Employee engagement and feedback provide strong indicators of how a company culture is being lived in reality. Roche has been conducting Global Employee Opinion Surveys (GEOS) since 2011. In 2019, we introduced a new engagement tool in partnership with Glint. 86% of all Roche employees participated, and the results below refer to all employees who took the survey. We asked employees a fundamental question: “How happy are you working at Roche?” 83% of employees responded that they were happy. Moreover, 89% of employees believe that the work they accomplish at Roche has a positive impact on society. In addition, 81% of people working at Roche share the opinion that the company offers a healthy workplace and 75% feel that the company has a genuine interest in their wellbeing.

Protecting the environment
Our commitment to the environment is not just about reducing the amount of waste or using less energy, but also developing processes that will make our business more sustainable. We take responsibility, along with other stakeholders, to minimise the impact of our medicines and diagnostic products on safety, security, health and the environment throughout the entire product life cycle. This is the essence of product stewardship. It actively supports sustainability programmes, which are an important part of Roche’s R&D activities and drug manufacturing. Here, the use of environmentally friendly chemicals and materials and innovative technologies help minimise Roche’s ecological footprint.
Access to healthcare

We want to ensure sustainable access.

Access to healthcare

Our innovations are meaningless if they are out of reach to those in need.

We want to ensure sustainable access.

Patient needs in low- and middle-income countries

Patients in low- and middle-income countries face a range of barriers to receiving vital medical care in a timely manner, including:

- Disease awareness—does the patient know they have contracted the illness?
- Timely diagnosis—has a diagnosis been made early enough for treatment to be effective?
- Funding challenges—are resources available to enable the patient to receive treatment?

The World Health Organization and the World Bank estimate that half of the global population—an estimated 3.5 billion people—do not have access to essential health services.

Access Accelerated initiative

Non-communicable diseases (NCDs) are the fastest growing diseases in low- and middle-income countries and cause extensive economic and social hardships. The Access Accelerated initiative, a collaboration among more than 20 healthcare and pharmaceutical companies from Europe, Japan and North America, works towards a future where anyone living with an NCD has access to high-quality treatment and care.

In 2018, the initiative issued ‘Access Accelerated in Action: Key Learnings in Program Design and Implementation’, a report outlining principles for good programme design and highlighting examples of their successful implementation. In 2019, Roche launched a partnership with Boston University to develop projects that build upon the metrics framework provided in the report. These projects will be reported to the Boston University Access Observatory, a publicly available database covering public-private industry partnerships that aim to improve access to preventive and treatment services in low- and middle-income countries.
City Cancer Challenge (C/Can) 2025

This multi-sector initiative supports cities in the design, planning and implementation of cancer treatment solutions to reduce premature deaths from NCDs by 25% by 2025. Specifically, the project is advancing city-based oncology in Asunción (Paraguay), Cali (Colombia), Kumasi (Ghana) and Yangon (Myanmar). These cities serve a combined population of more than 25 million.

Initial efforts have already been effective. In Cali, for example, the C/Can needs assessment led to the allocation of USD 20 million for diagnostic equipment. And in Asunción it resulted in the adoption of a national cancer law.

Roche is the leading industry partner in the plans to expand the C/Can initiative to include 20 cities by 2020 with a view to developing and launching a C/Can model that can be upscaled globally. Kigali (Rwanda), Porto Alegre (Brazil) and Tbilisi (Georgia) became the first cities to take part in the next phase, while León (Mexico) and Greater Petaling (Malaysia) recently joined the C/Can programme.

As of late 2019, C/Can serves 43.5 million people, has engaged with 1,286 healthcare professionals, mobilised over 50 local organisations and is currently involving 757 patients in the needs assessment process in the current cities.

Improving access to diagnostic testing

Limited access to diagnostic resources leads to the spread of preventable diseases and the loss of life. In developing countries, lack of screening, early detection and resources to prevent transmission are the leading causes of deaths from infectious diseases.

The Global Access Program was established in 2014 to increase access to diagnostic testing in line with the UNAIDS 90-90-90 goal. The aim is that by 2020, 90% of all people living with HIV will know their disease status, 90% of all those diagnosed with the HIV infection will receive sustained antiretroviral therapy, and 90% of all those receiving antiretroviral therapy will have viral suppression. Working in collaboration with global partners, the programme has been highly successful in providing access to testing, training healthcare workers and boosting the capacity of the healthcare system.

In 2019, Roche expanded the programme to include tests for tuberculosis, hepatitis B and C and human papillomavirus (HPV), the leading cause of cervical cancer. This involved collaborating with the Clinton Health Access Initiative and the Foundation for Innovative New Diagnostics, and others.

The expansion of the Global Access Program is aimed at helping the WHO meet its disease elimination targets for hepatitis, cervical cancer and tuberculosis.
Community engagement

Our activities are built on meaningful relationships and mutual trust.

We deliver sustainable outcomes.

Strong partnerships for strong communities

Whether it be a long-term commitment or an urgently needed response, we seek to achieve lasting improvements for society. Our main focus areas involve humanitarian and social efforts, community and environmental projects, science and education programmes as well as the arts and contemporary culture. Roche has a long history of philanthropic engagement. What began with supporting the International Committee of the Red Cross more than a hundred years ago has evolved into an impressive string of lasting partnerships. Accredited non-governmental organisations such as the World Wide Fund for Nature (WWF), UNICEF or Habitat for Humanity have all become our trusted partners.

Staying on track for many years to come

The two South African Phelophepa primary healthcare trains are a leading example of making a sustainable impact on society. Roche and Transnet, the country’s main freight logistics company, came together in 1994 to provide free primary healthcare to rural areas. Marking the 25th anniversary of the collaboration, Roche renewed its support as the initiative’s main external sponsor in 2019.

Focus on disadvantaged youngsters

In India, we funded college and university scholarships for 19 students from Kiran Children’s Village, some of whom had disabilities. Literally meaning ‘ray of light’, Kiran provides rehabilitation, education and vocational training, and shines a beacon of light into the lives of these disadvantaged youngsters. By attending university in Varanasi, the Roche-sponsored students have become the first generation from their village to go into higher education.

In Johannesburg, South Africa, 28 students who received scholarships from Roche graduated from the Maharishi Institute. The institute is a non-profit organisation with the aim of educating a new generation of leaders for South Africa by providing funding for students looking to access education offered by its educational partners.
Cautionary statement regarding forward-looking statements
Roche in Brief contains certain forward-looking statements. These forward-looking statements may be identified by words such as ‘believes,’ ‘expects,’ ‘anticipates,’ ‘projects,’ ‘intends,’ ‘should,’ ‘seeks,’ ‘estimates,’ ‘future’ or similar expressions or by discussion of, among other things, strategy, goals, plans or intentions. Various factors may cause actual results to differ materially in the future from those reflected in forward-looking statements contained in Roche in Brief, among others: (1) pricing and product initiatives of competitors; (2) legislative and regulatory developments and economic conditions; (3) delay or inability in obtaining regulatory approvals or bringing products to market; (4) fluctuations in currency exchange rates and general financial market conditions; (5) uncertainties in the discovery, development or marketing of new products or new uses of existing products, including without limitation negative results of clinical trials or research projects, unexpected side effects of pipeline or marketed products; (6) increased government pricing pressures; (7) interruptions in production; (8) loss of or inability to obtain adequate protection for intellectual property rights; (9) litigation; (10) loss of key executives or other employees; and (11) adverse publicity and news coverage.

The statement regarding earnings per share growth is not a profit forecast and should not be interpreted to mean that Roche’s earnings or earnings per share for 2020 or any subsequent period will necessarily match or exceed the historical published earnings or earnings per share of Roche.

All trademarks are legally protected.

Links to third-party pages are provided for convenience only. We do not express any opinion on the content of any third-party pages and expressly disclaim any liability for all third-party information and the use of it.

Roche in Brief is published in German and English.

Printed on non-chlorine bleached, FSC-certified paper.
We would like you to immediately experience patient stories through their own words.

Get the free Xtend app:
Open the ‘scan’ option in the app, look for the icon and watch the videos.

Our images are now videos.