



Roche in Australia
Innovation Leader

7,000,874 hours of work
6,587 experiments
423 researchers
1 drug



Innovation: it's in our DNA

For nearly 120 years, Roche has been committed to improving lives.

Headquartered in Basel, Switzerland, Roche is a leader in research-focused healthcare with combined strengths in pharmaceuticals and diagnostics, its two core business areas.

Roche is consistently ranked among the top investors in research and development worldwide, across all sectors, reflecting our commitment to innovation and science.

We are also the world's largest biopharmaceutical company, with truly differentiated medicines in cancer, immunology, infectious diseases, ophthalmology and neuroscience.

We are working to understand how diseases differ down to the molecular level, so we can develop new tests and medicines that prevent, diagnose and treat diseases, and bring them to the patients who need them.

**Svend Petersen - Managing Director,
Roche (Pharmaceuticals) Australia**



“Ultimately, lasting innovation is our greatest contribution to society. This is our legacy and a great responsibility for the future as the world's largest biopharmaceutical company.”

60+
YRS

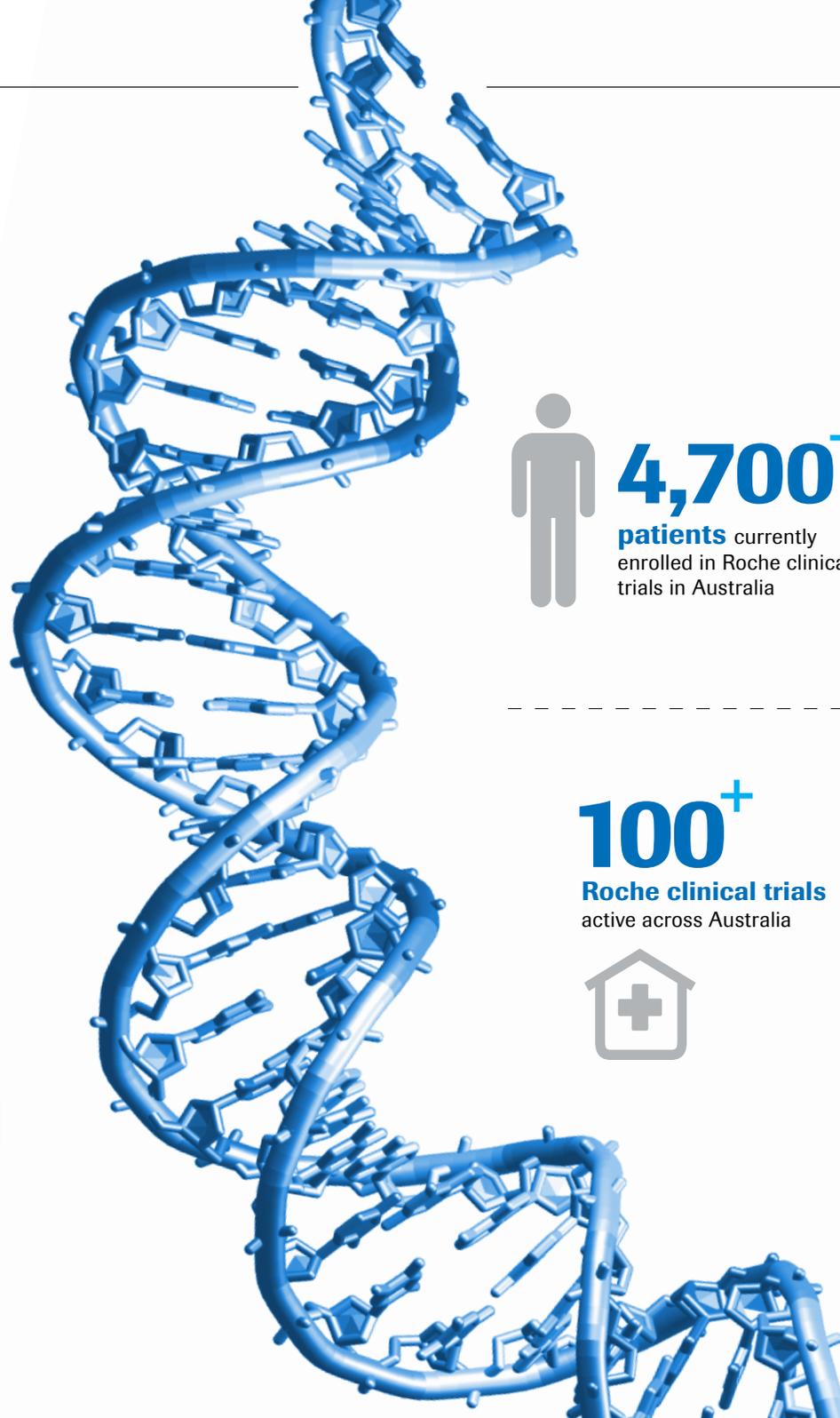
commitment to the health and wellbeing of Australians

Australian patients have access to around **40**



\$37mil+

Australian dollars invested in local research and development each year



4,700+
patients currently enrolled in Roche clinical trials in Australia



700+
clinical trial sites nationwide



100+
Roche clinical trials active across Australia



110+
clinical research employees



* Figures correct November 2016



Roche is continuing its legacy of innovation – with our broad portfolio of new molecules that address high unmet medical needs, we are at the forefront of transforming science into new therapies.

Roche has developed or produced some of modern medicine's foundational therapies, many of which remain the standard of care across the world today, decades after their discovery.

Twenty-nine medicines developed by Roche are included in the World Health Organisation Model Lists of Essential Medicines (2015), among them antibiotics, anti-malarials and chemotherapy.

The entrepreneurial spirit and inventiveness of the founding era still defines our culture – a culture that encourages innovation and a willingness to take risks. Roche regards lasting innovation as the company's most important contribution to society.

Backed by stable majority owners for over 100 years, Roche strives for long-term value creation rather than short-term gain, because real innovation in our industry requires perseverance and long-term thinking.

Clinical trials are critical for determining the safety and efficacy of new medicines.

Globally, over 310,000 patients participated in a Roche clinical trial in 2016. Roche has an industry-leading pipeline with 70 compounds in clinical development.

In Australia, we have over 100 active clinical trials involving more than 4,700 patients and employ over 110 clinical research staff. In 2016, Roche invested more than 37 million Australian dollars in pharmaceutical research and development.

Patient safety is our highest priority. Roche follows stringent principles, regulations and guidelines to ensure that we maintain the highest ethical standards in our research and that volunteers and patients are exposed to the lowest risk possible.

Further information on Roche clinical trials is available at <http://rochetrials.com>.

Clinical trial investment



Helen Aunedi
Country Head, Clinical Operations
Roche (Pharmaceuticals) Australia

“Innovation is our answer to medical challenges. The benefits of innovation are invaluable and encompass improved health and wellbeing, productivity and carer benefits, healthcare efficiency and addressing unmet needs.

Continued investment in clinical trials in Australia has the potential to result in health benefits, generate jobs and improve our nation’s innovative capacity.

As a nation we need to recognise and reward innovation, to ensure that Australians don’t miss out on improved health, wellbeing and productivity.”

World-class scientists across the Roche Group are uncovering intricate details about disease biology and the root molecular causes of diseases.

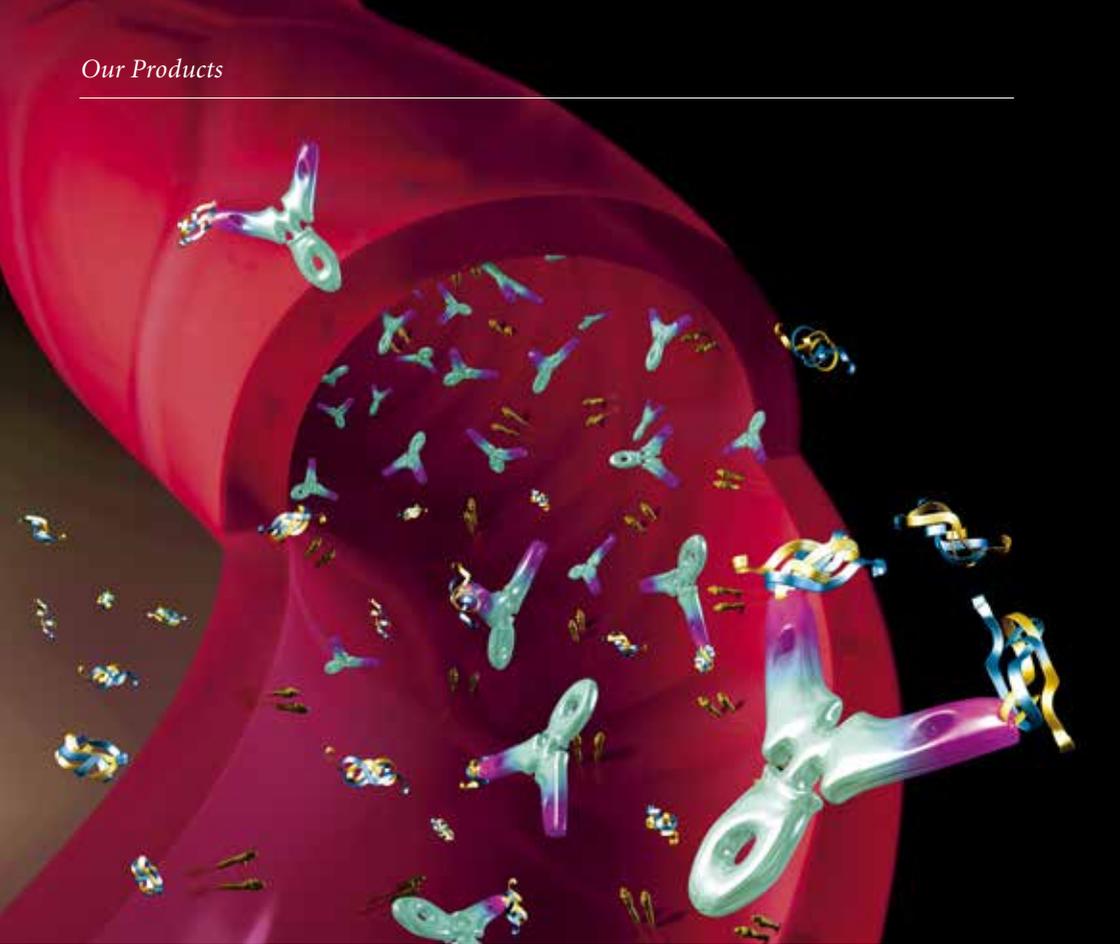
At the same time, they are diving deeper into human biology to unlock the mysteries of the immune system.

Leading in personalised healthcare

At Roche, personalised healthcare means fitting the treatment to the patients – providing the right therapy for the right group of people at the right time. Personalised healthcare has the potential to identify those patients who will benefit most from a specific treatment, thereby reducing the risk of ineffective treatment and/or adverse events.

Combining our strength in pharmaceuticals with the Roche Group's diagnostics division, we have positioned personalised healthcare at the centre of our business strategy. With growing insight into genetic differences, we are able to develop tests and treatments that help tailor medicines to the people who are most likely to respond well. This approach will continue to shape the future of medicine. In fact, two-thirds of our new medicines are being developed with companion diagnostics.





Our products

Roche has a broad and established portfolio of medicines. This includes interferon, anti-viral and anti-infective therapies to treat patients with a range of infectious diseases; monoclonal antibodies which target inflammatory conditions such as rheumatoid arthritis and vasculitis; and a range of therapies which help patients with neurological disorders such as Parkinson's disease, depression and anxiety.

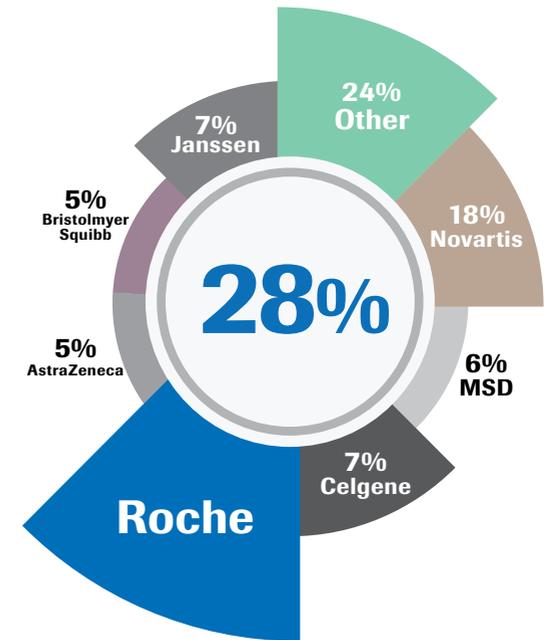
World leader in cancer care

Globally, the Roche Group is the world's leading provider of cancer care products. At the forefront of cancer research and treatment for over 50 years, we developed or produced some of the world's first targeted biologic therapies – a class of monoclonal antibodies, which transformed the way many cancers are treated. Roche continues to provide patients with innovative therapies to treat breast, skin, blood, gastro-intestinal, ovarian, colorectal, lung, and numerous other cancers.

Cancer medicines sales in Australia

In Australia, Roche is the leading provider of cancer medicines by sales.

Roche is the no.1 provider of cancer medicines in Australia with 28% market share (IMS data, October 2016)



Focus on significant unmet medical need

We're developing medicines in the areas where we see the greatest need:

- In oncology (cancer), we are working to provide effective treatments through the discovery and development of novel therapeutics that target the specific molecular pathways associated with cancer
- In immunology, we are growing our expertise so that we can continue to discover and develop innovative medicines for patients living with diseases, such as rheumatoid arthritis or asthma

- In neuroscience, we are developing medicines for a range of serious neurological diseases including schizophrenia, Alzheimer's disease, multiple sclerosis, depression, Parkinson's disease, Down syndrome and autism
- In infectious diseases, we are committed to finding effective treatments for life-threatening viral and bacterial infections which are among the leading causes of disability and death

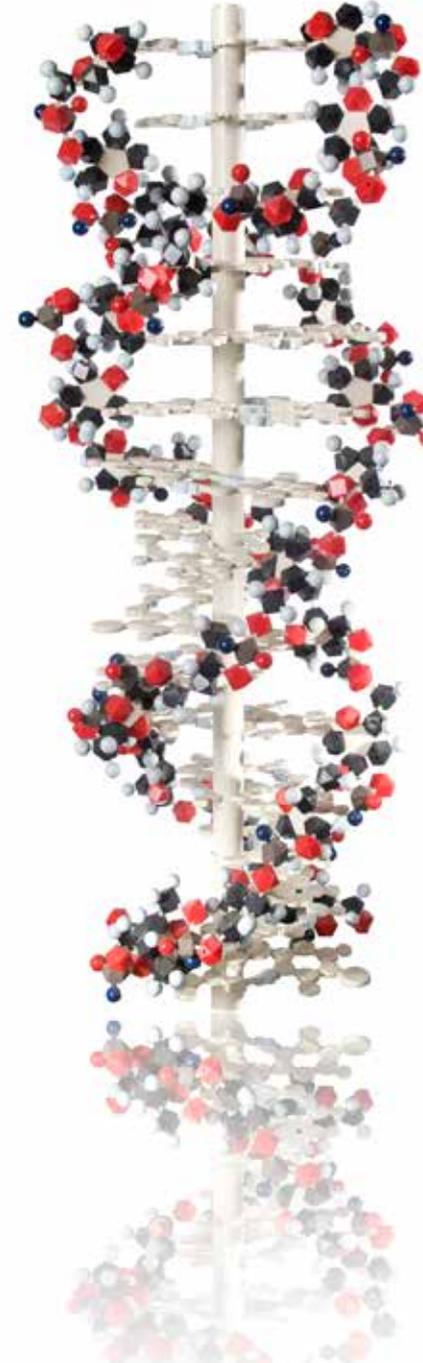
Collaboration is the key

Roche aims to be the partner of choice for biotechnology companies and research institutions worldwide. We do this by maintaining a model that values external innovation as highly as our own internal discoveries and we view established collaborations as a cornerstone of our research and development strategy. As a result, we have around 200 external partnerships and alliances worldwide with companies and institutes.

Foundation Medicine

In 2015, Roche (globally) entered into a broad strategic collaboration with Foundation Medicine to leverage the organisation's expertise in the field of genomics and molecular information. Combined with Roche's expertise in oncology, this partnership provides the opportunity to characterise tumours and match them with approved targeted therapy options or novel treatments under development, to advance the progress of personalised treatments for patients with cancer.

The Foundation Medicine collaboration marks the next milestone in Roche's strategy of using high-quality healthcare data and advanced analytics to improve both the development of medicines and decisions in patient care.



Monash University and Hudson Institute autoimmune diseases research collaboration

In 2016, Roche entered into an exclusive license agreement with Monash University and the Hudson Institute of Medical Research for an early-stage research collaboration, focused on proteins that stimulate anti-inflammatory pathways for the treatment of autoimmune diseases.

The collaboration aims to develop next generation treatments for autoimmune diseases, focused on proteins targeting novel molecular pathways. The partnership will enable the multi-disciplinary research team and Roche to work together to advance and translate existing and new intellectual property into novel treatments.

Immunotherapy Centres of Research Excellence (imCORE) Network

In 2016, Roche launched imCORE, a global network of scientists and clinicians from leading cancer research institutions in cancer immunotherapy who will work together with scientists from Roche to accelerate the search for cures for people with cancer. The research network is spread across 21 academic centres and nine countries, including Peter MacCallum Cancer Centre in Melbourne.

Top 20 R&D Spenders

2016 Rank	Company	Geography	Industry	R&D Spend (US \$Bn)*
1	Volkswagen	Germany	Automotive	13.2
2	Samsung	South Korea	Computing and electronics	12.7
3	Amazon	United States	Software and internet	12.5
4	Alphabet	United States	Software and internet	12.3
5	Intel Co	United States	Computing and electronics	12.1
6	Microsoft	United States	Software and internet	12
7	Roche	Switzerland	Healthcare	10
8	Novartis	Switzerland	Healthcare	9.5
9	Johnson & Johnson	United States	Healthcare	9
10	Toyota	Japan	Automotive	8.8
11	Apple	United States	Computing and electronics	8.1
12	Pfizer	United States	Healthcare	7.7
13	GM	United States	Automotive	7.5
14	Merck	United States	Healthcare	6.7
15	Ford	United States	Automotive	6.7
16	Daimler	Germany	Automotive	6.6
17	Cisco	United States	Computing and electronics	6.2
18	AstraZeneca	Britain	Healthcare	6
19	Bristol-Myers Squibb	United States	Healthcare	5.9
20	Oracle	United States	Software and internet	5.8

*Global Innovation 1000 Study Report, PwC (2016)

Doing now what patients need next

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.



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