



Corporate Analyst Briefing 2019

November 21, 2019 | Karachi

Agenda

- Overview of Sanofi Global
- History of Sanofi Pakistan
- Pakistan Pharma Industry Overview
- Financial Performance

Sanofi Global Overview



SANOFI

Empowering Life



We Make Medicine to Make People Better



We take responsibility for the future

We are people, patients, parents, caregivers, researchers, and teachers. Together, we are Sanofi, a healthcare organization dedicated to improving the lives of people worldwide. Our teams work with passion and commitment to understand and solve everyone's healthcare needs. We transform scientific innovation into healthcare solutions, accept challenges and challenge the accepted. We have the courage to fight for equal opportunity and to speak out against discrimination. We believe that better health begins with education.

At Sanofi, we express this purpose in two words:

Empowering Life

We overcome health challenges together



Darrin, Multiple Sclerosis



Michelle, Gaucher disease



Antoine, Flu immunization



Darcus and Vernee, High cholesterol level



James, Prostate Cancer



Mizutani, Pain



Gustavo, Pompe disease



Irène, Diabetes



In Brazil, Dengue immunization



We are committed to improving access to healthcare for those in need

The “My Child Matters” program was created in 2005, in response to the question, “Where can we be useful and where are there health needs that few people respond to?” says Dr. Anne Gagnepain-Lacheteau, Medical Director of the Sanofi Espoir Foundation. One of the answers was Childhood cancer in low- and middle-income countries.

DELIVERING INNOVATIVE MEDICINES AND VACCINES

We contribute to the control, eradication and elimination of some infectious diseases such as Polio and Sleeping Sickness

STRENGTHENING PRIMARY CARE SYSTEMS

We pilot programs to reduce the burden of Non Communicable Diseases such as the Access Accelerated Initiative

DEVELOPING NEW BUSINESS/ AFFORDABILITY MODELS

We provide sustainable solutions for unmet medical needs in low- and middle-income countries

How we bring solutions to people's healthcare needs

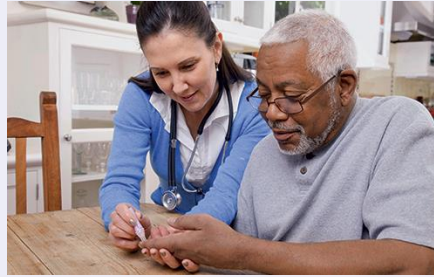
Fighting pain



Pain is both the most common symptom and the main reason why people seek medical help.

- We strive to help relieve pain for children and adults with our range of solutions that varies from over the counter pills to injectable medicines.

Managing Diabetes



An estimated 400 million adults have diabetes, a lifelong condition.

- More than 50% of these persons take insulin once a day. We have provided people with insulin treatments for close to a century.

Vaccinating to eradicate Polio

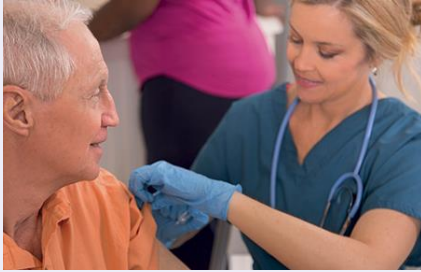


We have been involved in the Global Polio Eradication Initiative since its launch in 1988.

- We have provided more than 6 billion doses to make the final stage of the program possible. Today, the number of cases has decreased by more than 99% globally, which means we could soon be living in a polio-free world.

How we bring solutions to people's healthcare needs

Vaccinating against Flu



Flu is a highly contagious disease that claims 250,000 to half a million lives globally each year.

- We produced around 200 million doses of influenza vaccines in 2018 and are committed to broadening protection against influenza.

Preventing Malaria



Malaria kills a child every two minutes. We fight this deadliest parasitic disease through prevention and affordable treatments.

- Thanks to public-private partnerships, more than 400 million treatments have been distributed in Africa over the last 10 years, mostly for children.

Innovating in Rare Diseases



There are more than 7,000 rare diseases in the world, and 30% of children affected die before their 5th birthday.

- We work on solutions for rare diseases, including an enzyme replacement therapy to treat Gaucher disease, which impacts fewer than 10,000 diagnosed patients globally.

Overview of Sanofi Global



Around the World

Our healthcare solutions are available in more than 170 countries



Our teams

100,000+
employees

145
nationalities

100
countries



Key figures in 2018

€34,463 m SALES

By geographic areas

United States

€11,540 m

Emerging Markets

€10,112 m

Europe

€9,434 m

Rest of the world

€3,377 m

€6,819 m BUSINESS NET INCOME⁽⁴⁾

(1) World excluding U.S., Canada, Western & Eastern Europe (except Eurasia), Japan, South Korea, Australia, New Zealand and Puerto Rico.

(2) Western Europe + Eastern Europe (except Eurasia: Russia, Ukraine, Georgia, Belarus, Armenia and Turkey).

(3) Japan, South Korea, Canada, Australia, New Zealand, Puerto Rico.

(4) Business net income is a non-GAAP financial measure (see Appendix 10 to the February 7, 2019 press release for a definition).

Our 5 Global Business Units bring focus



Vaccines Sanofi Pasteur

- Influenza
- Pediatric Combinations
- Meningitis
- Adult Boosters
- Travelers



Consumer Healthcare

- Cough & Cold, Allergy
- Pain Care
- Digestive Health
- Nutritional Health



Primary Care in Mature Markets

- Diabetes and Cardiovascular
- Established Products



Specialty Care Sanofi Genzyme in Mature Markets

- Immunology
- Multiple Sclerosis
- Rare Diseases
- Oncology
- Rare Blood Disorders



China & Emerging Markets

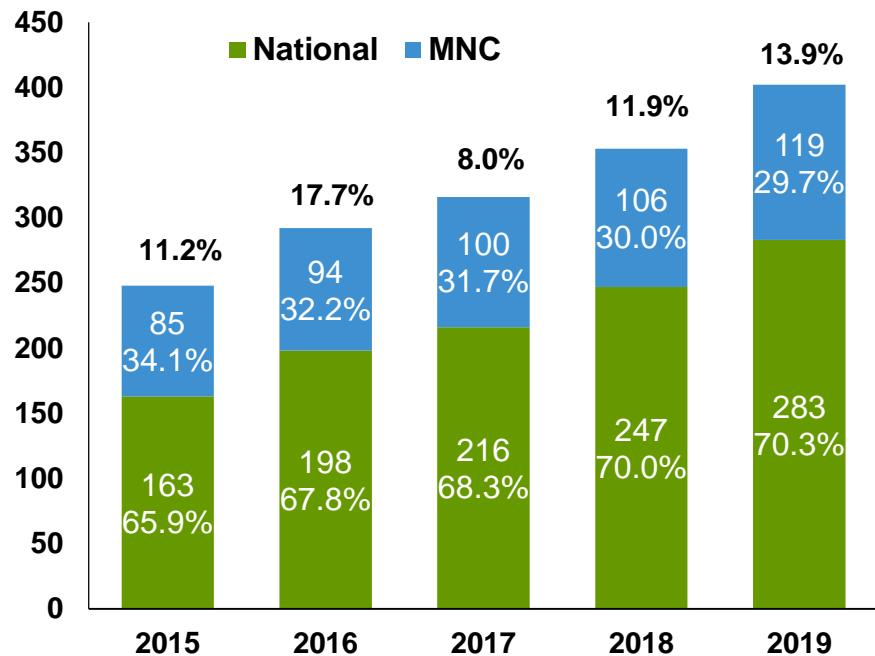
- Established Products
- Diabetes and Cardiovascular
- Specialty Care

Pakistan Pharma Market

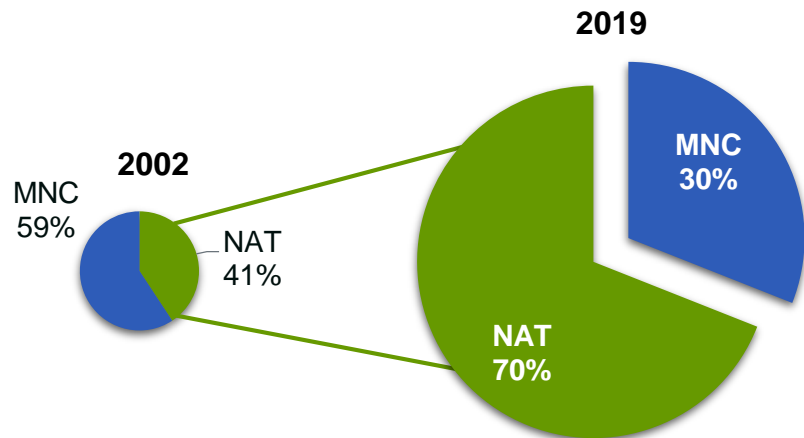


Pakistan Pharma Market PKR 401.9 Billion Gr. 13.9%

BPKR



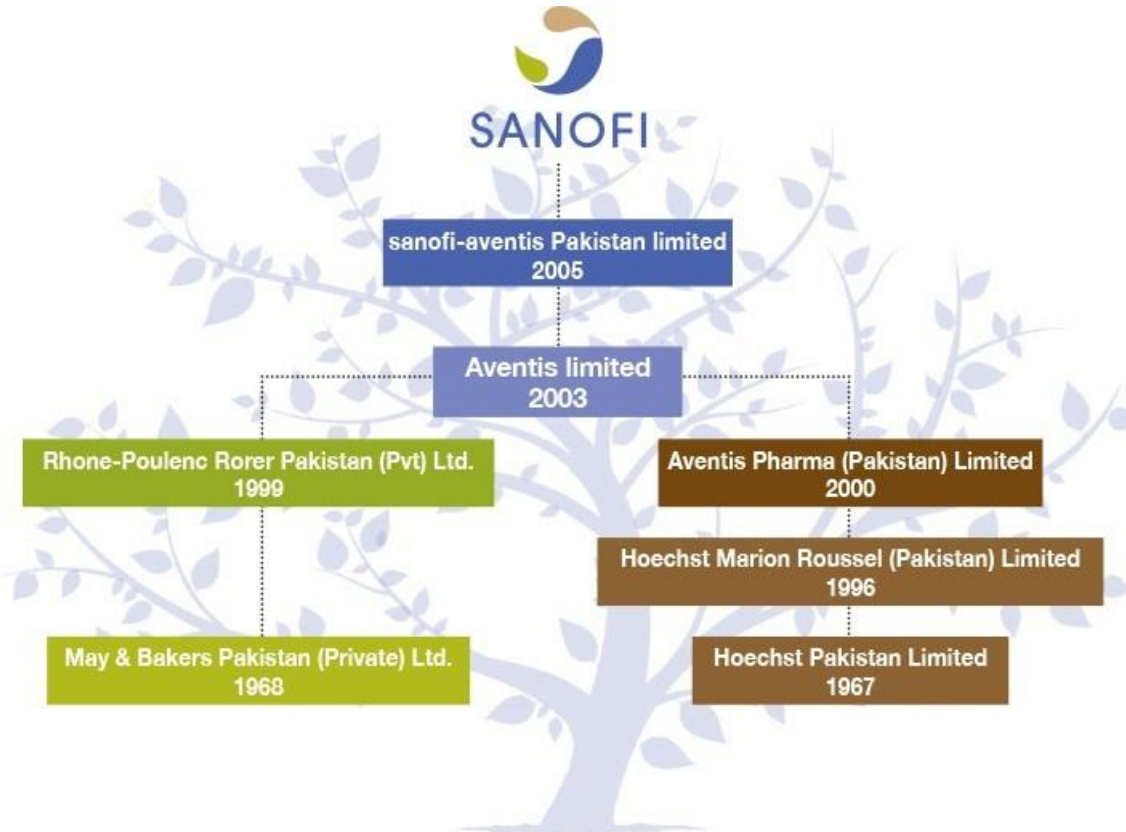
	CORP	MS	Growth	CAGR
MNCs	24	29.7%	12.7%	8.9%
NCs	586	70.3%	14.5%	14.7%
Total Market	610	100.0%	13.9%	12.8%



sanofi-aventis Pakistan Limited



History of Sanofi Pakistan



Pakistan Business Units



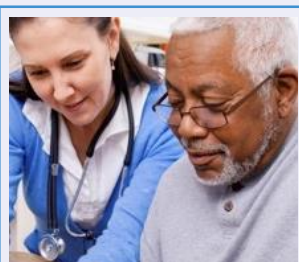
Primary Care

- Flagyl[®]
- Haemaccel[®]
- Claforan[®]
- Clexane[®] 40 Mg



Cardio

- Clexane[®] 60 & 80 Mg
- Amaryl[®]
- Plavix[®]
- Aprovel[®]



Consumer Healthcare

- NO-SPA[®]
- Enterogermina[®]
- Telfast[®]
- Selsun Blue[®]



DCV

- Lantus[®]
- Apidra[®]
- Toujeo[®]



Specialty Care

- Taxotere[®]
- Eloxatin[®]
- Thymoglobuline[®]



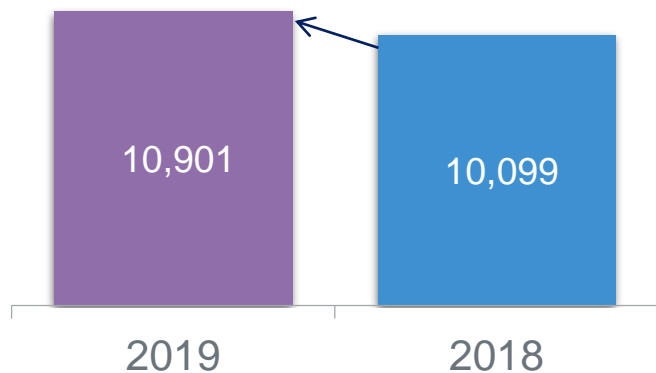
Vaccines

- Menactra[®]
- Hexaxim[®]
- Vaxigrip[®]



Financial Information

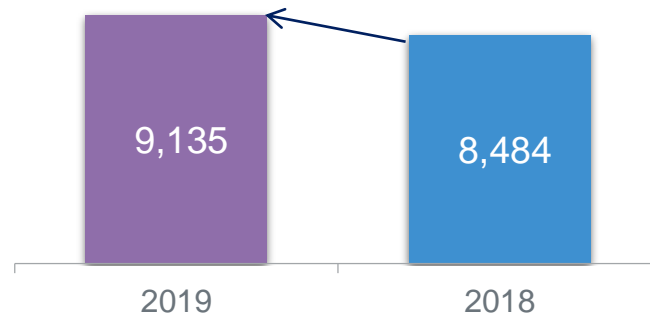
Net Company - Sales



8% growth at a total Company level

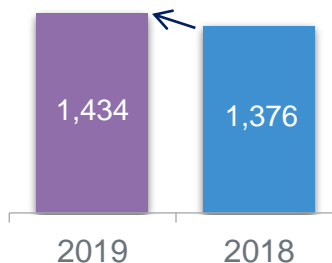
Pharmaceutical Sales - Net

7.7% growth over the same period last year



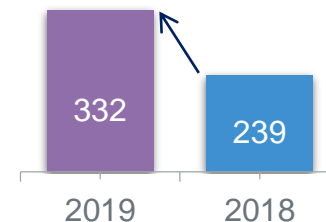
Net Sales - CHC

4.2% growth on reported basis

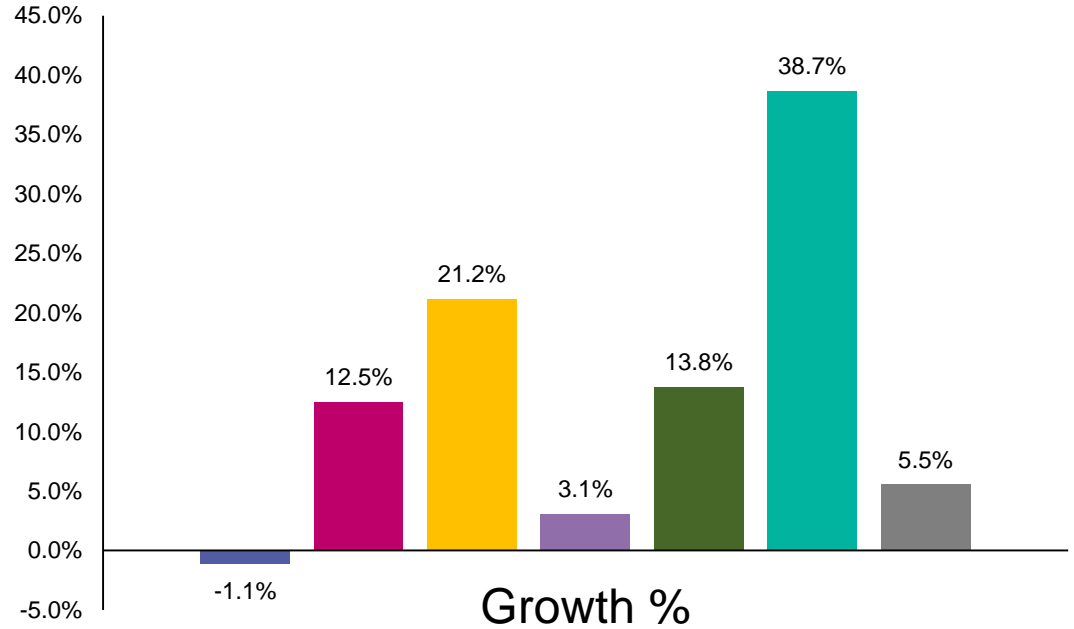
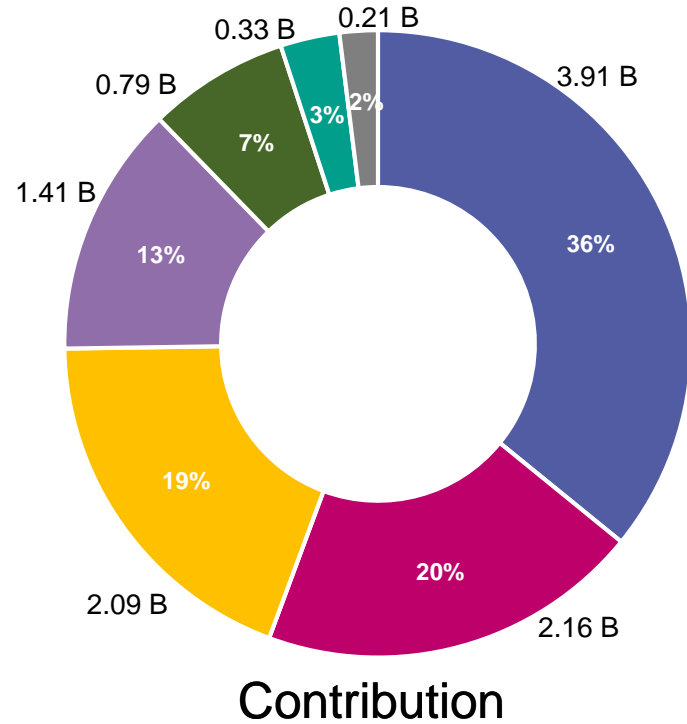


Net sales - Vaccines

38.7% growth on reported basis



Sales by Business Units – YTD Sep 2019

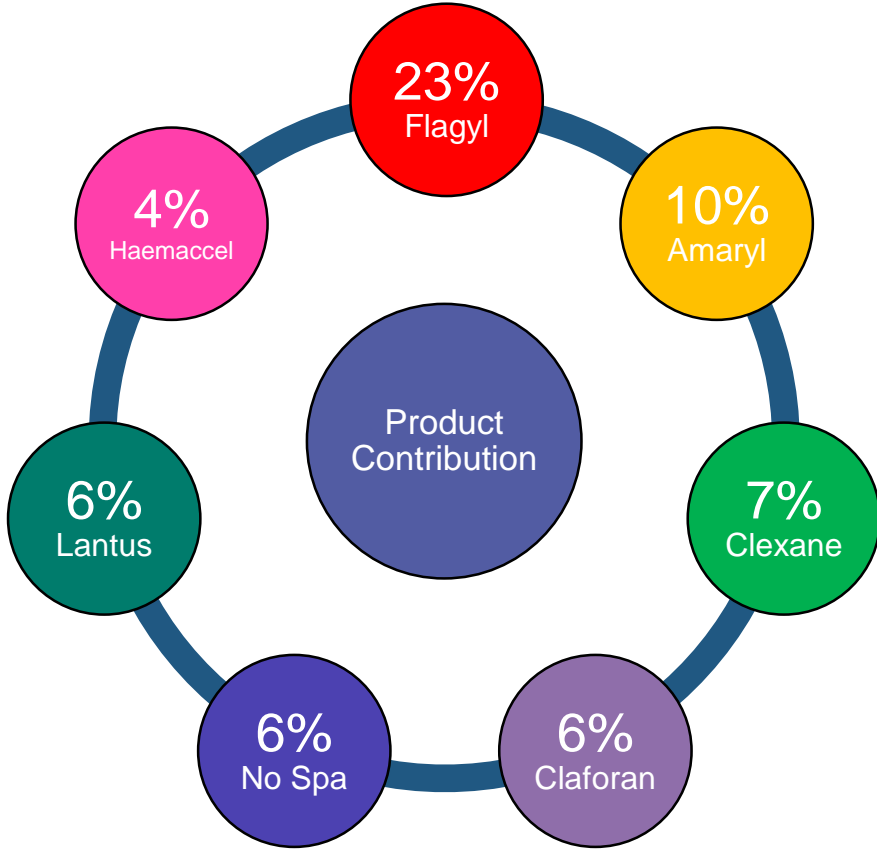


■ PRIMARY CARE
■ CARDIO
■ OTHERS
■ CHC
■ DCV
■ VACCINES
■ SPECIALITY CARE

Key Highlights YTD Sep 2019 - Major Products

Rs. 2.504 Billion
Flagyl[®]
Metronidazole

Rs. 1.047 Billion
Amaryl[®]
Gliclazide



Key Highlights

YTD SEP-2019

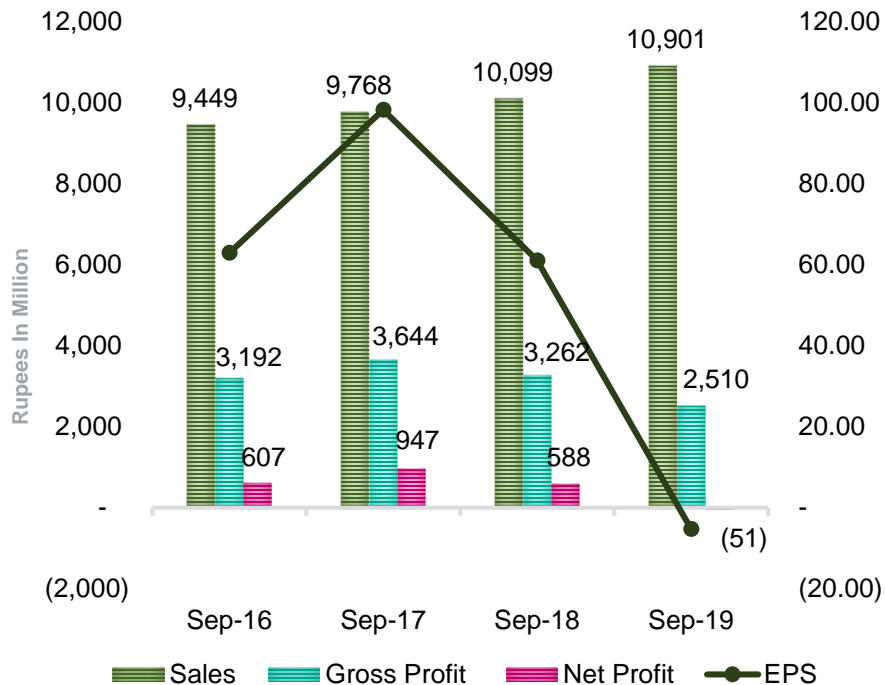


YTD SEP-2018

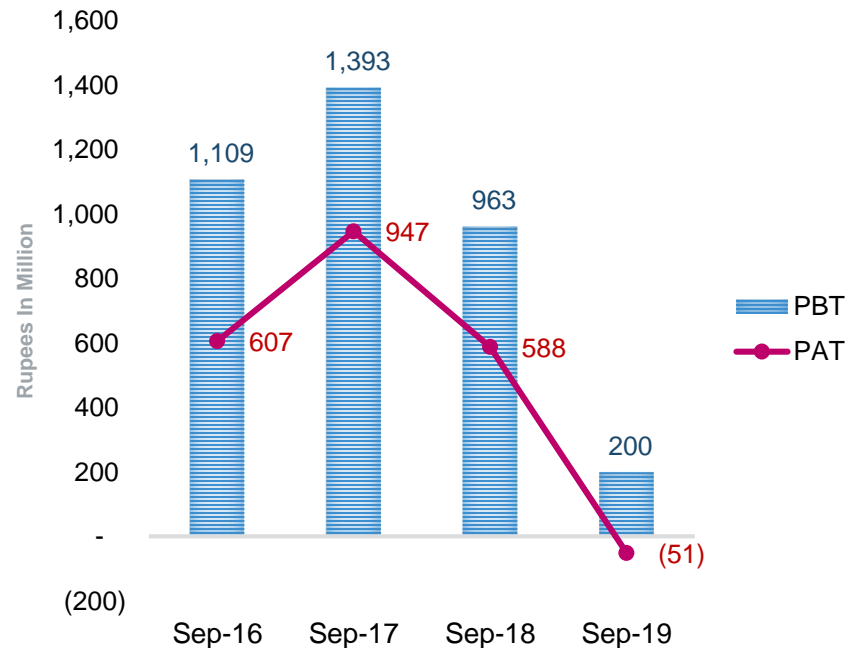


Key Highlights – YTD Sep 2019

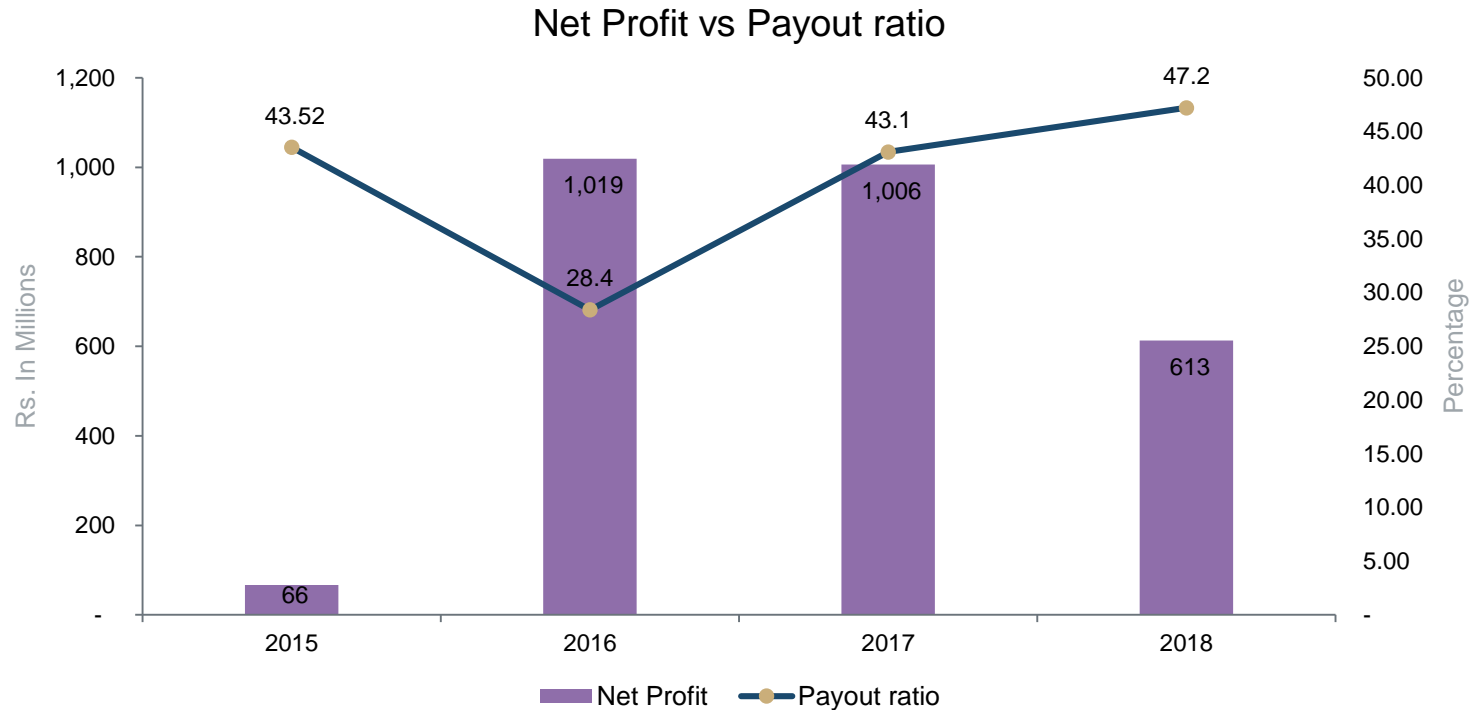
PROFITABILITY



COMPARISON OF PAT AND PBT



Full Year Historical Payout



Thank You