
Personalisierte Medizin als Innovationsstrategie - Herausforderungen für die Roche-Pipeline

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Roche

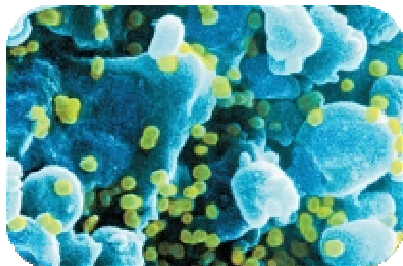
A leading global healthcare company



- Employing > 80,000 people
- Active in 150 countries on six continents



- Two core businesses:
 - Pharmaceuticals
 - Diagnostics
 - This combination enables real advances in personalised healthcare



- Number one in biotechnology
- 10 products with sales over CHF 1 billion

Roche Group – structure



Pharmaceuticals

Roche
Pharma



Genentech

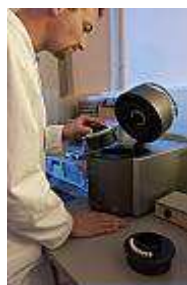


Chugai



Diagnostics

Roche
Applied
Science



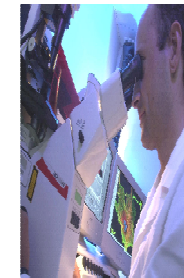
Roche
Molecular
Diagnostics



Roche
Professional
Diagnostics



Roche
Tissue
Diagnostics



Roche
Diabetes
Care



The Roche innovation network

Key sites

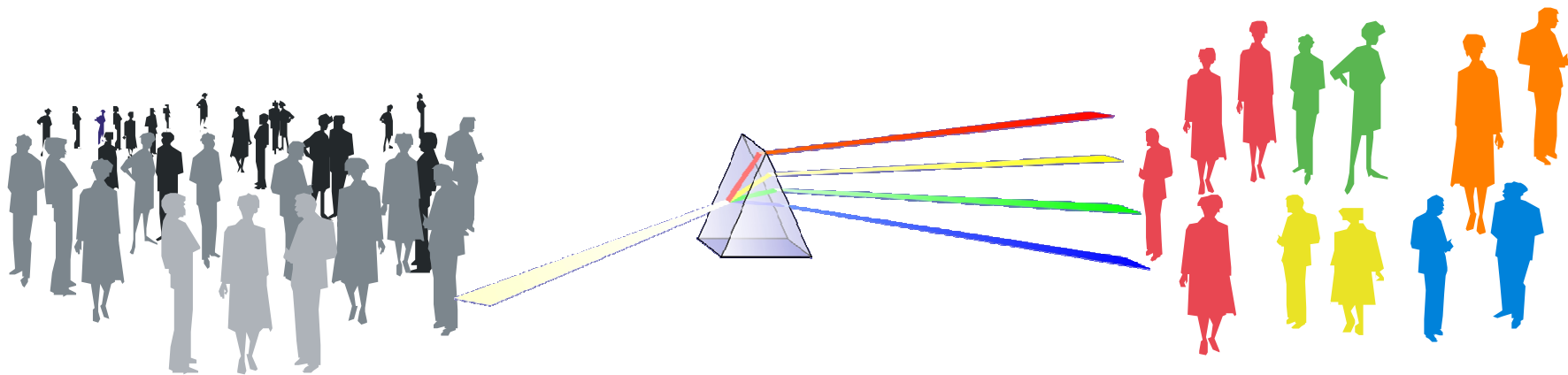


Pharma Research Diagnostics

The Advent of Personalised Healthcare

Today and tomorrow

Personalised Healthcare:



Still today almost all patients are treated in a few similar ways

- Only 20-60 % of patients receive effective treatment*
- Nearly 200.000 people die from adverse drug reactions*

Increasingly

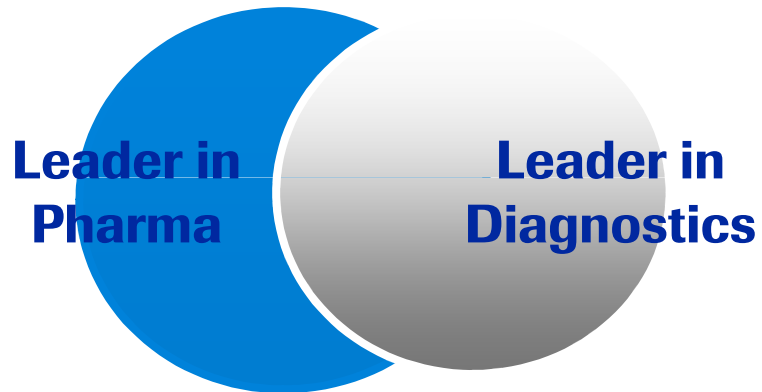
selected patient groups
biological markers

*Medscape Pharmacotherapy 2001

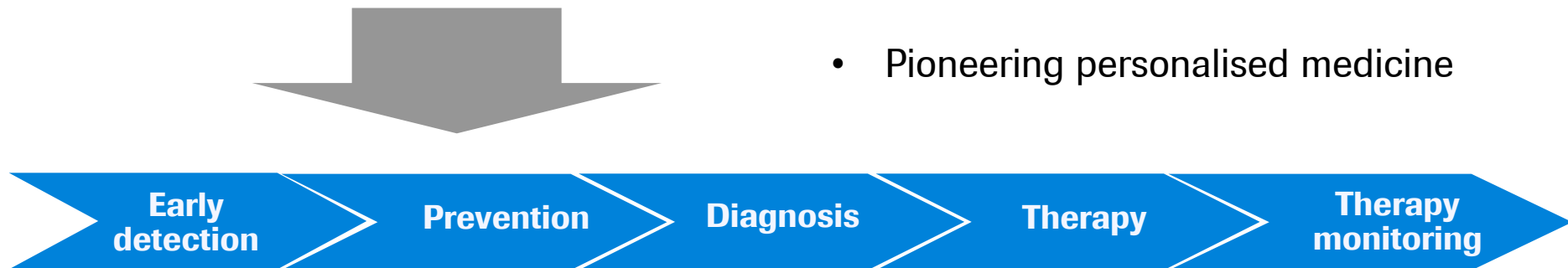
Roche Group – what makes us distinctive

Committed to innovation and technology leadership

**Driving personalised
healthcare**

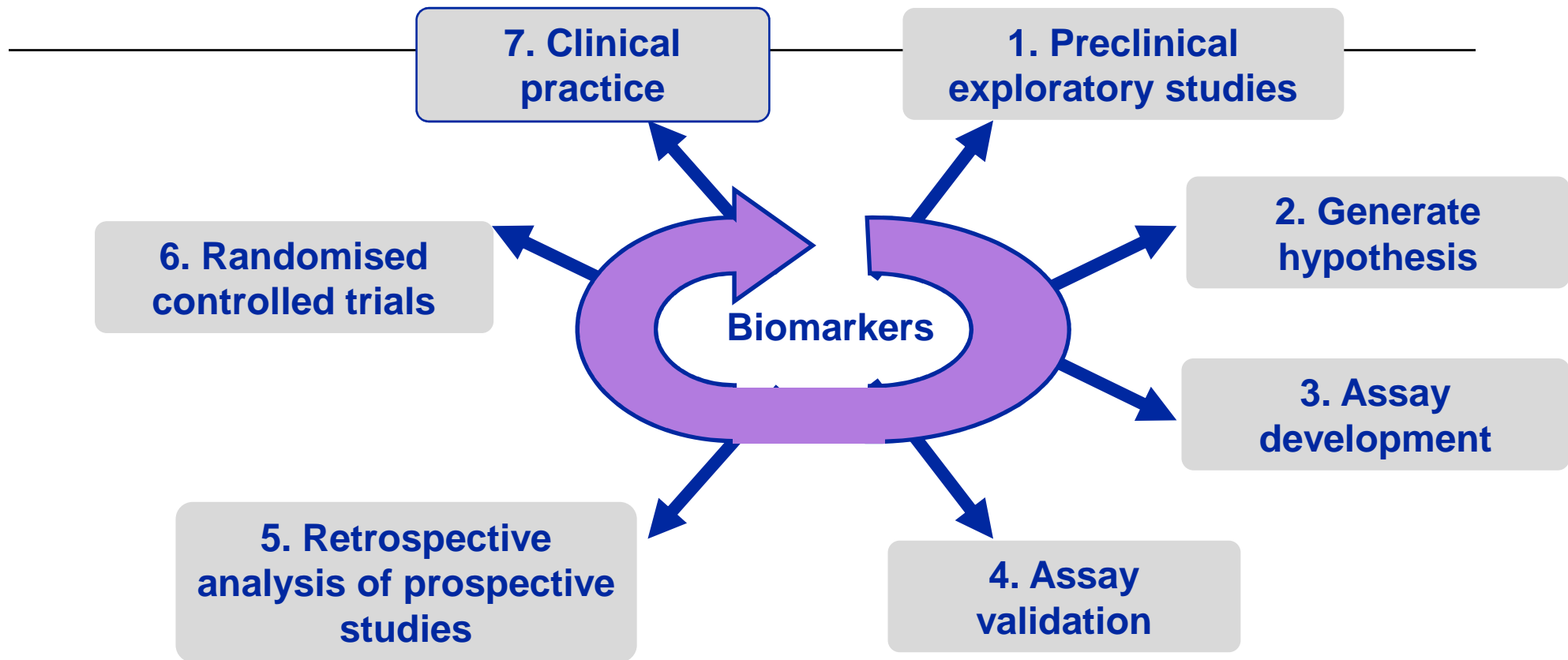


- Combined strengths of Pharmaceuticals and Diagnostics
- Synergies in research, development and marketing
- Unique global network of alliances
- Pioneering personalised medicine



From biomarker identification to clinical practice

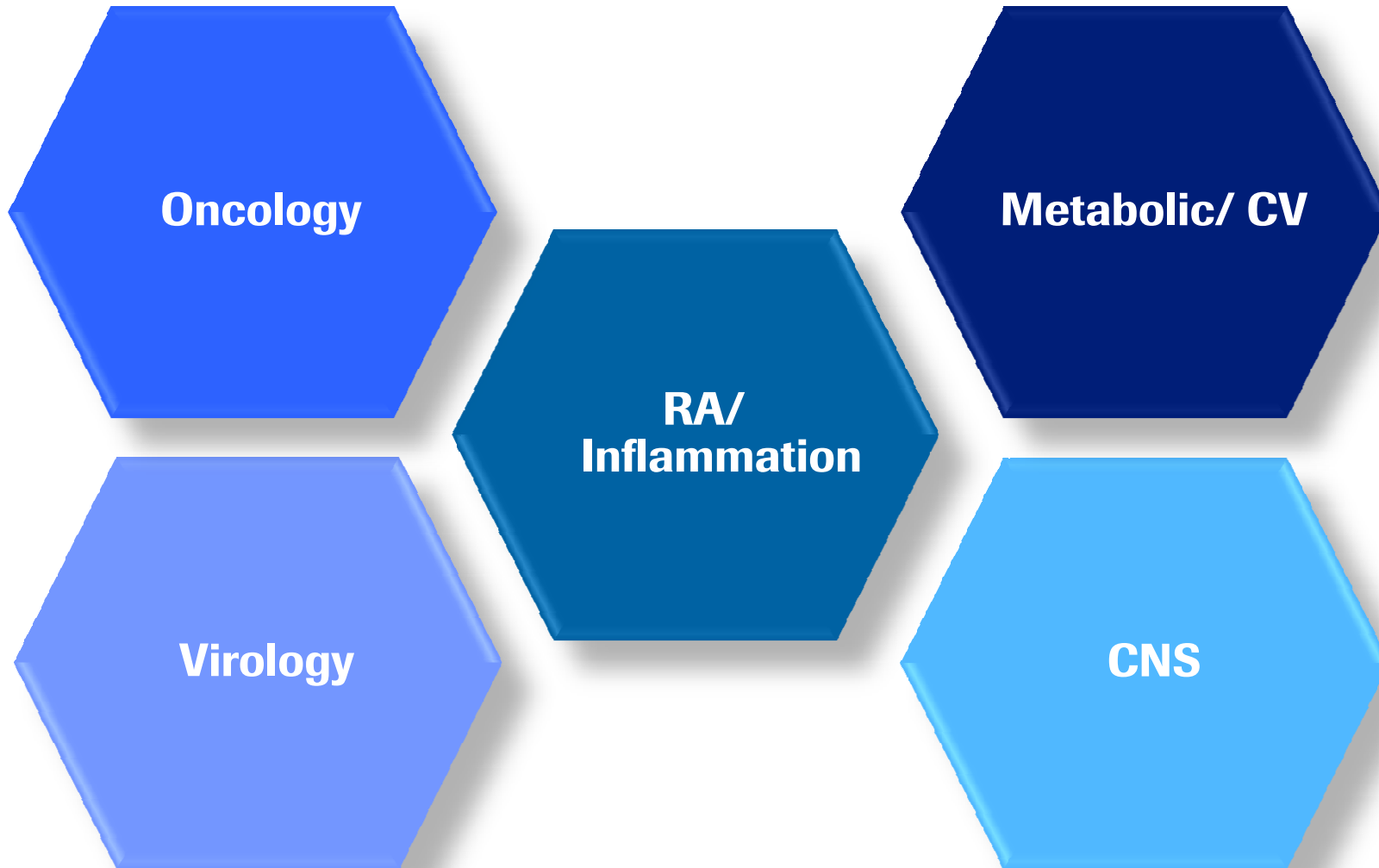
A lengthy process



Numerous opportunities for industry – academia collaborations

Roche Pharma pipeline

Focused on five Disease Biology Areas



What Roche is looking for ?

Projects that pass three tests

1. Strategic fit

Alignment with Roche R&D / opportunistic



2. Scientific value

Will this result in a differentiated medicine providing significant clinical benefit to patients?



3. Business case

Will this bring value to both companies?

CNS DBA strategy

Four strategic focus areas

Alzheimer's disease and other neurodegenerative disorders

Multiple sclerosis

Schizophrenia

Treatment-resistant depression

Opportunistic approach in other high unmet need areas such as:

ADHD

Autism

Inflammation DBA portfolio

Three strategic focus areas

Rheumatoid Arthritis - psoriasis, lupus nephritis, SLE, sjogrens, other inflammatory arthritides

Asthma - atopic dermatitis, allergic rhinitis

COPD

Metabolic DBA strategy

Three strategic focus areas

Type 2 Diabetes

Dyslipidemia / Vascular Disease

Renal Diseases

Oncology DBA strategy

Balanced portfolio of small molecule and biologics against major oncology targets

Best in class

Novel molecular targets

Personalised healthcare

To remain the number one oncology company by continuing to introduce novel therapies to improve the lives of cancer patients

Virology DBA strategy

Two strategic focus areas

HCV

HBV

Complemented by:

Other viruses, especially for approaches driving towards eradication (e.g. HPV, RSV, CMV)

Integrated enabling technologies strategy

Improved R&D productivity

**Next-gen
biologics**

**RNA
Drugs**

**Disc. &
early safety**

**Drug
delivery**

Biomarkers

Prepare medium-term stepwise improvements to drug discovery and development

Integrated enabling technologies strategy

Transforming technologies that have potential to change the rules of future treatments

Cell therapies

Oral & cell selective

In Silico

Think treatment not drug
Assess change of business model for new treatments



We Innovate Healthcare