

The Roche Intelligence Dossier

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Abstracts

As the fourth largest pharmaceutical company in the world, with annual revenues of \$43.9 billion, some of the most instantly recognisable drugs marketed and the kind of pipeline smaller companies only dream of, Roche's performance seems beyond reproach.

The headlines speak for themselves: While pharmaceutical revenues rose 11 per cent in Q3, boosted by sales of Tamiflu, net income at Roche Group fell 29 per cent in the first half of 2009, as the cost of the Genentech deal took effect. The FDA approved Valcyte for paediatric indication and Avastin for renal cancer, while the EMEA gave the nod to MabThera for rheumatic arthritis. On the corporate landscape, the company announced the buyout by Genentech of Lonza's cell culture biologic manufacturing facility in Singapore for \$360 million, while appointing new C-level executives.

But behind the glowing headlines lies another story. Despite facing just one more year of debt repayment for the Genentech takeover, Roche recently announced layoffs in the company's late-stage drug development and administration areas. What's more, while several key drug profiles such as Xenical and Xolair are under review by the FDA, the company is facing stiff competition from Tamiflu generics and an increasingly aggressive antiviral development market.

In six months of Roche's major successes and setbacks, the question is: How does the positive news balance against the negative?

Key insights on critical developments at Roche

The Roche Intelligence Dossier — the second in FirstWord's new series — delves behind the headlines of 125 articles on Roche's Q2 and Q3 developments, to review the events forming the company's present and future. In the 40-plus page dossier,

FirstWord discusses not just the content of news reports, but offers visual breakdowns charting their positive or negative spin and how that affects Roche's brand perception.

The report reviews Roche's Q2 and Q3 developments to establish:

Critical trends in news reports of Roche's corporate, financial, product and R&D resources

Key areas of importance affecting Roche's outlook to give competitors significant insight

The report

Offers a detailed overview of all reported developments, events and corporate adjustments for the past two financial quarters

Discusses key positives in media reports, such as revenue recovery, drug developments, approvals and corporate appointments as well as negative news surrounding competition from generics, setbacks in regulatory rulings and drug reviews as well as financial and administrative issues

Updates on clinical trial results, terminations or approval applications for prominent drug profiles such as Avastin, Herceptin, XELODA, Lucentis, MabThera and Actemra.

Examines current R&D threads, as well as those being developed by competition

Offers a general company overview, stakeholder details, up-to-date financials and extensive charting of the Phase III pipeline.

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