



Cipla Corporate Presentation

Established in 1935, Cipla is a pioneer in the Indian pharmaceutical industry

"Never again will India be starved of essential drugs"- Dr K A Hamied - Founder



1930-40		Established with a vision to meet India's needs & lay the foundation of Indian Pharmaceutical Industry Cipla was founded in 1935 by Dr. K A Hamied. Mahatma Gandhi visited Cipla in 1939
1960's		Set the stage for API development in India by establishing first manufacturing plant
1970's		Spearheaded India's patent regime – a step towards making India the pharmacy hub of the world
1980's		Cipla receives first US FDA approval for manufacturing
1990's		Set up Goa manufacturing facility, built respiratory capabilities, role of Cipla in providing affordable medicine during HIV epidemic
2000's		Platform technology development, Scaled up Goa units for export markets, Oncology API unit setup at Bangalore,
2010+		Set up Indore manufacturing facility, Medpro acquisition in Republic of South Africa, Acquired 100% stake in two US based companies, InvaGen Pharmaceutical Inc. and Exelan Pharmaceuticals Inc.

Today Cipla is a ~\$2bn revenue company with operations in over 100 countries

80 YEARS OF CARING

3rd – India
Pharma Market
Rank

3rd – South
Africa Generics
Pharma Market
Rank

Top 5 in several
emerging
markets

Top 15 in
United States



35+ Manufacturing
Facilities



50+ Dosage Forms



1500+ Products



World's largest
inhalation portfolio



1 in 3

HIV patients take Cipla ARVs



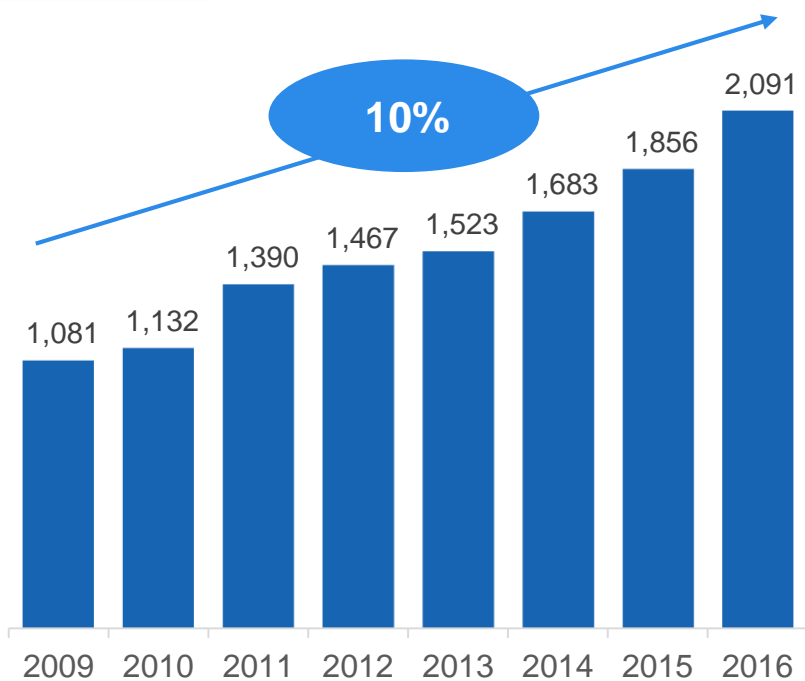
Partner of Choice

for developed markets e.g.
G. Nexium, Pulmicort,
Dymista, G. Lexapro

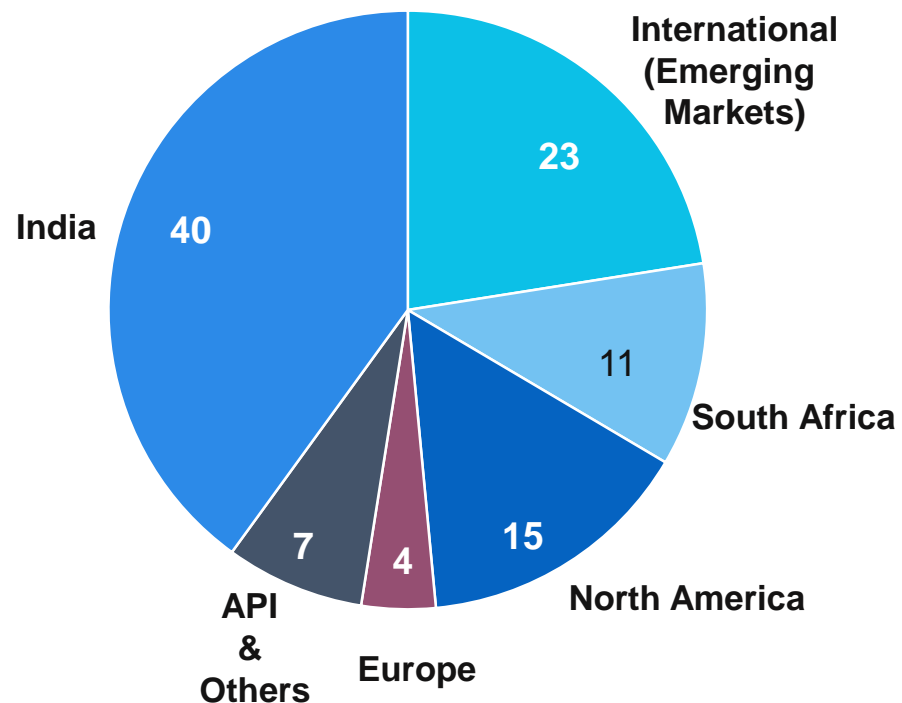
Cipla has witnessed steady growth and increased globalisation over the last few years



Revenues USD Million



Global Business Review Percent, FY 2016



Innovation has been an integral part of Cipla's growth story

Cipla's 30+ World's first products – with a focus on Inhalation Therapies



Iron Chelator for
Thalassemia



3-in-1 Inhaler for COPD



Transparent DPI and
single-action, multi dose DPI



3-in-1 cocktails for
HIV/AIDS – Triomune



First combination of in a
Breath Actuated pMDI

Static-free spacer with
valve mechanism

Combination of an
antihistamine and
an intranasal
steroid (INCS) for
allergic rhinitis

**Tiotropium
in pMDI**

Generic
Pirfenidone, the
1st and only
approved
therapy for IPF

Generic
Sildenafil for
PAH

Complex & differentiated products
launched and commercialized



Onco Lyo Inj
(Gemcitabine)



Ophthalmic
(Travaprost)



Respule
(Albuterol)



Nasal spray
(Dymista)



Bilayer tablet
(T+A)



Injection
(Argatroban)



Soft Gel
(Isotretinoin)



Oral
Suspension
(Amox/Clav)



Hydrophilic
Matrix
(Metformin tab)



Tablet
(Alendronate)



Syrup
(Zidovudine)



Capsule
(Anagrelide,
Rivastigmine)



Molten Mass
Encap-sulaion
(Vancomycin)



Particulate
Coating
(Kcl caps)



Controlled
Substance
(Cet/Pseudo)



Hormonal
Product
(Levonorgstrel)

Cipla has a rich history of R&D and manufacturing partnership with global players for blockbuster products such as: G.Nexium (USA), Dymista Nasal Spray (EU, USA), Pulmicort Respules, G. Lexapro (USA) etc.

Focus on several innovative platform technologies for the future pipeline

<h3>Nanotechnology</h3>	<h3>Liposome Injections</h3>	<h3>Inhalation technology</h3>	<h3>Microsphere Injections</h3>	<h3>Sprinkles</h3>
 <p>Nanotechnology</p> <p>Paclitaxel, Fenofibrate, Siromilus</p>	 <p>Liposomal</p> <p>Doxorubicin, Amphotericin</p>	 <p>Inhalation technology</p> <p>MDIs and Dry Powder Inhaler</p>	 <p>Microencapsulates</p> <p>Leuprolide, Triptorelin</p>	 <p>Sprinkles</p> <p>Paediatric care products</p>

Sustained release formulations

- Core/Coat technology
- Hydrophilic Matrix
- OROS Technology
- MUPS Technology

Stemcells

- Strategic alliance with Stempeutics which produces stem cell based medicinal products

Characterization Science including Biosimilars

- 4 disruptive in-house Biosimilars & 1 insulin product currently under development
- Aim to focus on access and affordability

Over 100 patents granted including respiratory

Over 1500 dedicated and talented scientists

Patent filing includes drug substances & products, platform technologies, polymorphs and crystals & medical devices

Developing new drug delivery systems with an aim to improve compliance and convenience

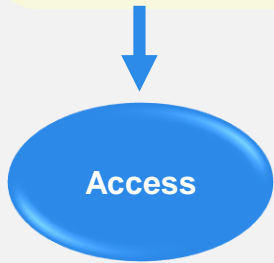
Developing proprietary medical devices for respiratory medicines

Cipla Biotech aims to create significant impact in Biosimilars/Biologics space

MISSION

CIPLA BIOTECH MISSION:

To be a Disruptive player in the Biosimilar space, using innovation to solve the challenges of

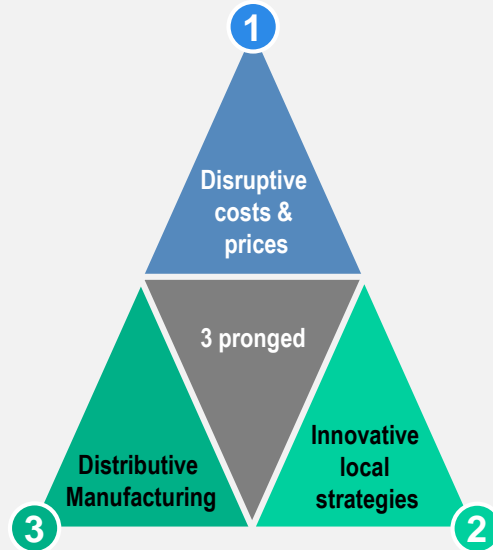


Providing optimal care within the patient's reach



At prices to create an impact comparable to Cipla's HIV revolution

STRATEGY



- 1** Using technology to drive higher efficiency that supports Access Expansion strategy

- 2** Embed within local ecosystems through strong stakeholder relationships

- 3** State-of-the-art "invest-as-you-need" manufacturing base to serve local needs

PROGRESS

Products

- 4 disruptive in-house Biosimilars & 1 insulin product currently under development

Assets

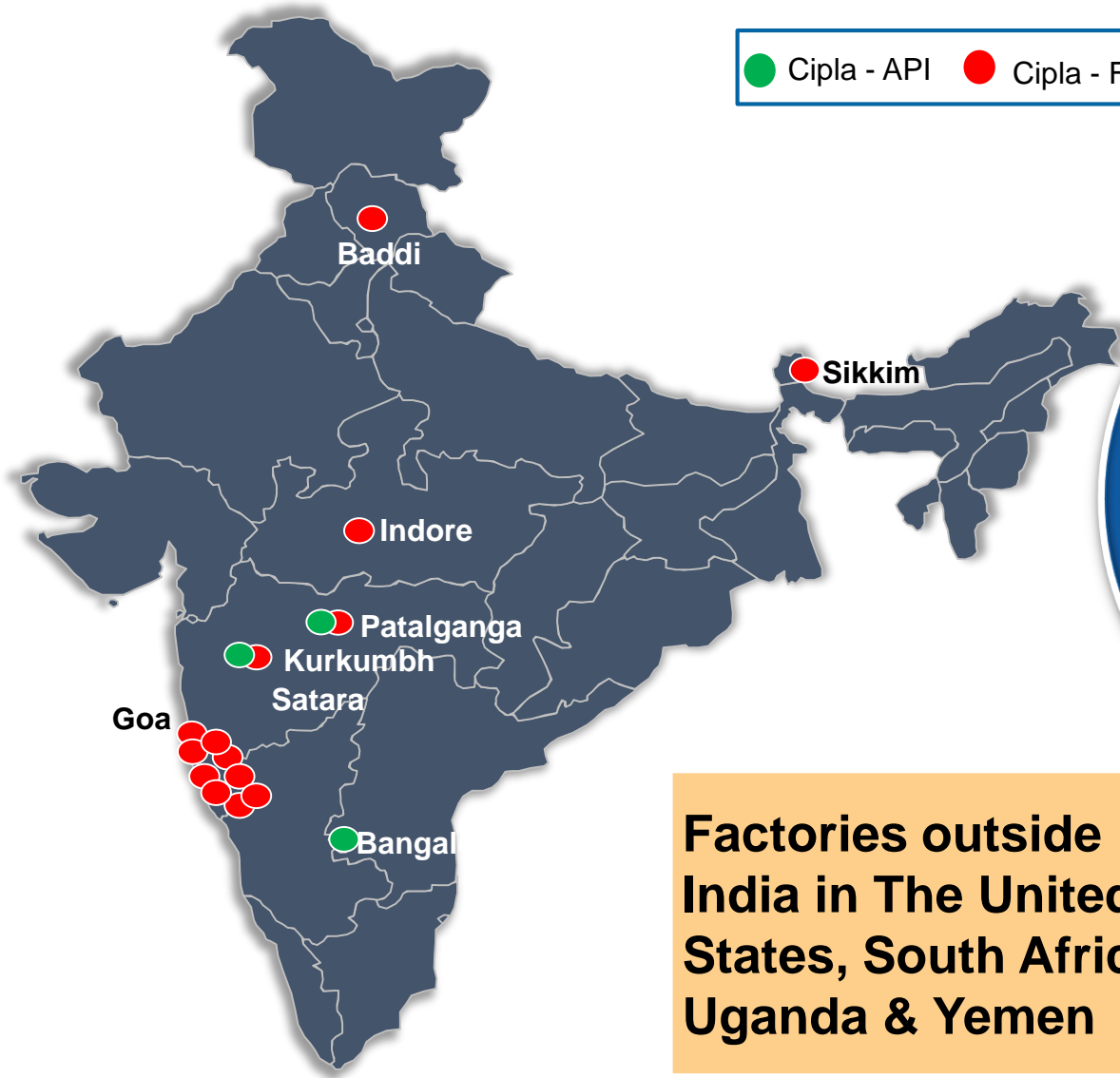
- Fully commercial scale Biologics facility.
- Investments in Cell lines and innovative manufacturing technology

Leadership

- Core Leadership team with over 100 years of cumulative experience in biologics business development

Cipla's products are manufactured in more than 35+ state-of-the-art facilities

● Cipla - API ● Cipla - Formulation



>35
State-of-the-art
manufacturing
facilities for API
and formulations

**Factories outside
India in The United
States, South Africa,
Uganda & Yemen**

Global quality and scale across different dosage forms

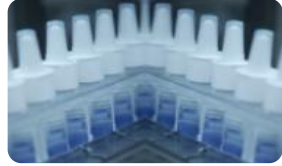
**Tabs and Caps –
23 Billion units**



**Aerosols pMDI –
75 Million units**



**Nasal Sprays –
30 Million units**



**Liquid Injection –
10 Million units**



**Respules –
400 Million units**



**Lyo. Injection –
5 Million units**



**3 Pc Eye drops –
20 Million units**



**FFS Eye drops –
60 Million units**



**UNIMS –
60 Million units**



**Oral Liquids –
35 Million units**



**Creams –
65 Million units**



**Bulk Drugs –
950 Tons**



Regulatory agencies' approvals (*non-exhaustive*)

Sites (<i>non-exhaustive</i>)	USFDA	MHRA - UK	WHO – Geneva	TGA - Australia	MCC – S. Africa	Japan	Brazil - Anvisa
InvaGen, US	✓						
Goa, India	✓	✓	✓	✓	✓	✓	✓
Patalganga, India	✓	✓	✓	✓		✓	✓
Kurkumbh, India	✓	✓	✓	✓	✓	✓	✓
Indore, India	✓	✓	✓	✓	✓		✓
Baddi, India			✓	✓	✓		

Across our 100+ countries, we ensure our products maintain one global standard

1

One quality philosophy throughout the entire organization

2

Harmonized systems and process across all facilities to meet applicable **Regulatory requirements**

3

Quality and compliance monitored through periodic **internal and external audits**

4

Continuous improvement program with periodic balanced score cards evaluation and product quality reviews.

- **Highly automated equipment** with high accuracy and compliance.

5

Qualified , experienced and trained staff to handle respective functions.

- Use of **4 eye principle** - “doer” and “checker” for key activities

Over 50 years of dedication to respiratory care

Undisputed capabilities across R&D, manufacturing and markets

Production Prowess

- 5 dedicated plants for respiratory products
- 3rd largest producer of pMDIs in the world
- Vertically integrated manufacturing process – from API to formulation and device

Emerging Markets Strength

- #1 player in Respiratory in India, South Africa, Sri Lanka
- Amongst top 5 players in Morocco, Philippines and Vietnam

Notable Alliances

Successful partnerships with global players to develop and launch differentiated products

- Sandoz: Generic Pulmicort Respules (USA)
- MEDA: Dymista Nasal Spray (worldwide*)
- Advanced discussions underway on co-development and marketing projects

Regulated Markets Growth

- EU: Launched key Respiratory products (Salmeterol Fluticasone and Mometasone) in select European markets – will continue to build volume market share
- USA: Robust pipeline under development with upcoming launches of SABA, ICS and ICS/LABAs

* Worldwide except 6 countries

World's Largest Inhalation Portfolio

28 molecules and combinations in multiple dosage forms and strengths available in 100+ countries



Innovative delivery mechanisms for treatment of airway diseases to meet the needs of various patients types

- More than 65 different inhaled products of more than 20 ingredients
- Some examples of devices:

MDI with Dose Counter



Synchrobreathe



Multi-haler



Revolizer



Rotahaler



Nasal Spray



Nebulizer



**Baby Mask
Infant Mask**



Breathe-O-Meter



**Zerostat VT
Spacer**



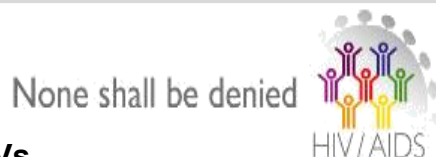
Founded in 2002 by Cipla, Chest Research Foundation is a charitable trust, a division of Hamied Foundation, and is dedicated to research in respiratory diseases



**Chest Research
Foundation (CRF)
Pune, India**

- 1 Works with corporate, educational and research institutions to improve understanding of the disease process, its diagnosis and its management**
- 2 Continual medical education for physicians and healthcare professionals**
- 3 Education programs for the community**
- 4 CRF has active collaborations with:
Imperial College of London to investigate non-smoking COPD in a unique Indo-British venture -
John Hopkins University, USA**
- 5 Recognized for PhD by University of Pune**

In HIV/AIDS, we make a difference to patients where accessibility is a challenge



World's largest range of ARVs

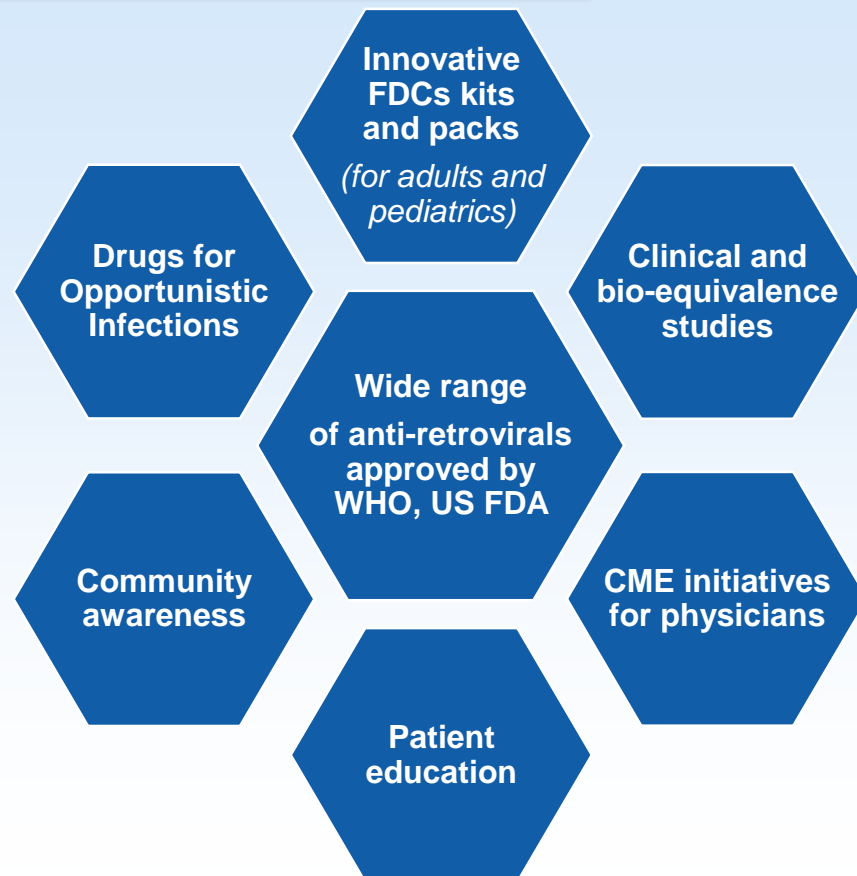
Cipla made the world's first ARV fixed-dose combination

- 3-in-1 pill (brand name "Triomune") that made it very simple for patients to take the complete treatment

Cipla made HIV treatment affordable and accessible

- Life-saving medicine was too expensive for the majority of the HIV-infected population who lives in Africa and Asia
- Triomune was offered to governments at a dollar a day
- Survival rate among AIDS patients increased by 80% from 1997 to 2003¹

Cipla: Spectrum of work



What's the use of developing life saving medicines if you can't make them affordable to the patient?

– Dr. Y K Hamied, Chairman, Cipla



Cipla Global Access

Cipla Global Access (C-GA) concentrates on four key therapy areas — HIV/AIDS, Malaria, Multi Drug-Resistant Tuberculosis and Reproductive Health

Signed sub-licencing agreement with Medicines Patent Pool (MPP) to manufacture generic HIV medicines **atazanavir** (ATV) and **dolutegravir** (DTG)

Entered into non-exclusive licensing agreement with Gilead Sciences, Inc. to manufacture Hepatitis C medicine. Launched in India under the brand name **HepCvir**, Cipla will be allowed to manufacture and market it in 90+ countries including India and South Africa

Signed sub-licencing agreement with MPP to manufacture anti-AIDS drug **tenofovir alafenamide** (TAF)

Collaborated with **Medicines for Malaria Venture** (MMV) for development of rectal artesunate for pre-referral treatment of children with severe malaria.

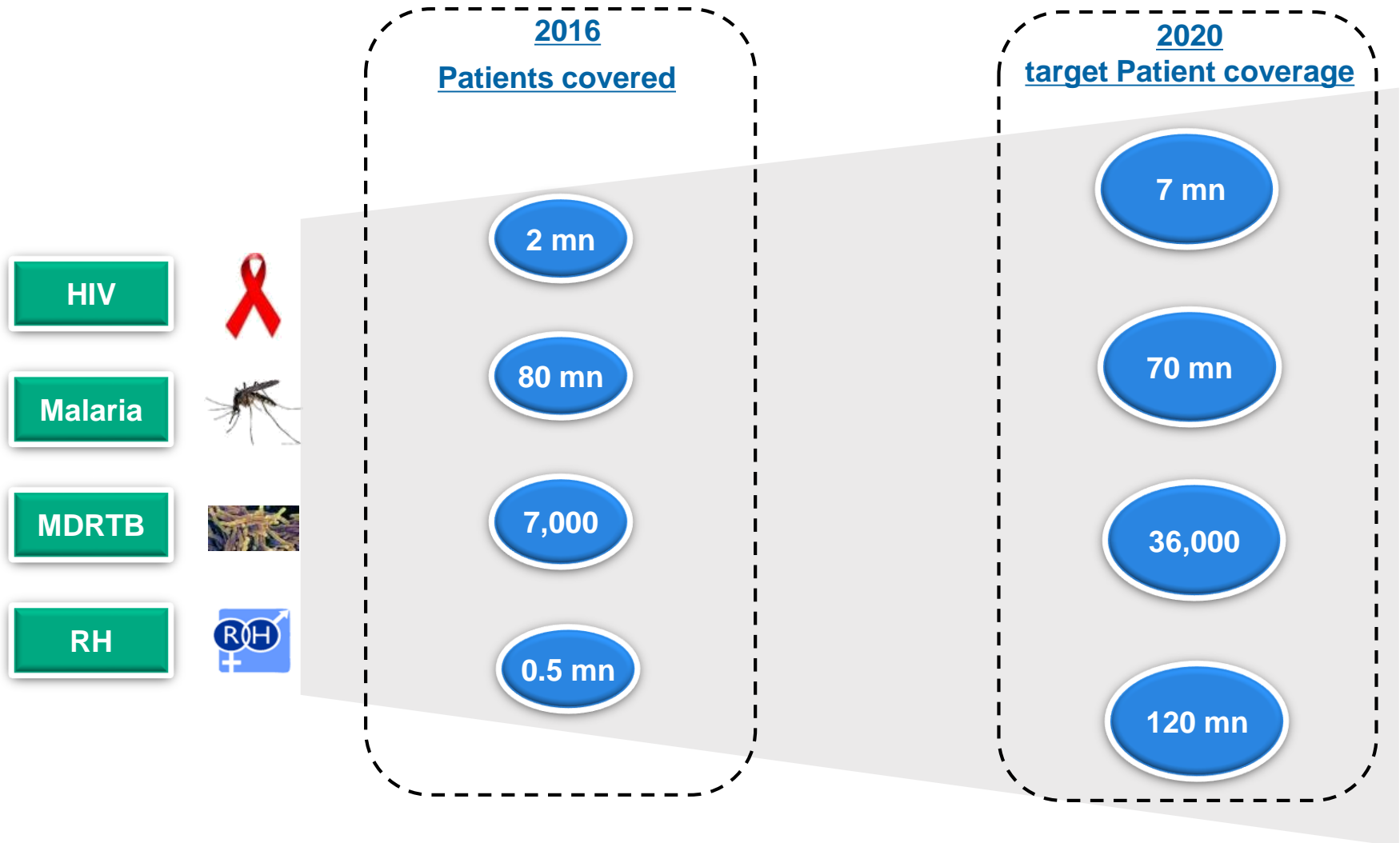
Secured 3-year tender contract from **The Global Fund** for supply of ARV treatments in 140 countries

Cipla has developed the taste masked Lopinavir/Ritonavir pellets (FDA approved in June 2015), for launch in 20 countries in 2016

Collaborated with DNDi (Drugs for Neglected Diseases initiative) and UNITAID for development of 4-in-1 taste masked sprinkles formulation of the combination Lopinavir/Ritonavir, Lamivudine and Abacavir or Zidovudine



Cipla plans to touch ~80 Mn Lives by 2020 with its access portfolio



~5.3% market share

Growth of 16% vs. market growth of 14% as per IMS

>10 specialised divisions catering to wide range of therapeutic areas

Market leader in 3 therapies **Respiratory , Urology , Pediatrics**

Largest field force in India with **>8000** employees

> 85% of medical practitioners in India prescribe Cipla products

Focus on enhancing **patient awareness, medical education**

Network of **6500** distributor partners helps Cipla reach **700,000** pharmacists



5% market share in Republic of South Africa

3rd Largest generics player in South Africa

Overall **sales growth of ~25% in FY 2015-16**, vs. last year

Strong presence across therapies, with leadership in Respiratory, CNS and Oncology segments

Access focus — 1\$ /day story: Long history in South Africa

Distinctive **sales force**

Household name among consumers, pharmacies, prescribers and key opinion leaders

Manufacturing facility at **Durban**

Establishing status as a “Partner of Choice” through alliances such as with Teva and Serum Institute of India



Includes Africa, Middle East, Latin America, Asia-Pacific (excluding India), Russia, Australia & New Zealand

Presence across **50+** countries, Relationship with **130+** partners, Range of **1000+** products

Overall growth of ~14% in International business in FY 2015-16

Market leader in many countries

Strong tie-ups with governments and funding agencies

Strengthened front end presence over the last 18 months in 16 markets, examples include — Morocco, Algeria, Sri Lanka, Uganda

Focus on complexity reduction and prioritizing investments in markets where we are in a leadership position





First Indian company to be approved by US FDA in 1985

Through the comprehensive partnership approach model, Cipla has been dedicated to providing access to medicines to US patients for over 30 years.

Partnered formulations with **20 plus** partners, commercializing **40 plus** products

Supported the development of more than **165 ANDAs** and has received **85+ final approvals; plus 2 NDAs approved** and marketed in the US

An active own internal pipeline including several key respiratory products and other complex generics similarly suited to our technology base

Completed acquisition of InvaGen Pharmaceuticals Inc. and Exelan Pharmaceuticals Inc. Integration of operations underway

Target to launch Cipla's own differentiated respiratory and oncology pipeline in near future

Building Specialty portfolio





Bringing access to medication, affordable medicines and true innovation to European patients

Presence in 30+ countries through partners and own network

50+ partners in Europe commercializing over 25 + INN's

Launch of Seroflo (Salmeterol, Fluticasone combination inhaler) in Europe

Continue to evolve our business model in Europe with the intention of balancing our advantaged portfolio with the best possible commercial and profit options.



Cipla New Ventures' businesses are poised to shape the future of Cipla

Cipla BioTec

To be a disruptive player in the biosimilar space, addressing Access and Affordability through innovation

Rich pipeline of Biosimilars in Oncology and Respiratory therapy areas in several stages of development

Working on innovative technology & go-to-market solutions to create a transformational impact in the way Biologics are used

Received marketing approval in India for a disruptive diabetes product with a novel delivery technology

Cipla Health

To be the most trusted healthcare partner for the Indian consumer, by genuinely improving their lives

Successfully launched the first product, Nicotex, the smoking-cessation chewing gum and has laid the path for making anti-smoking a national movement

Spun off consumer healthcare business into a wholly owned subsidiary

CipTec

To be Cipla's small molecule innovation engine tapping known drugs to make meaningful innovations

Pipeline consists of exciting early stage ideas in CNS (Central Nervous System) and Oncology therapies, including a strategic investment in the US-based R&D company, Chase Pharmaceuticals

Chase Pharmaceuticals has two lead assets for the treatment of patients with Alzheimer's Disease, of which the first, CPC-201, has progressed to Phase II trials

Stempeutics

To develop innovative stem cell products through cutting edge research and clinical applications

Strategic investment by Cipla in partnership with the Manipal Group on stem-cell based regenerative medicine

Scientifically established superiority of pooled donor product with pooling technology patent from US Patent office. Received ATMP classification from EMA. Received process patent by the State Intellectual Property Office of China.

Cipla holds marketing rights in India to the products developed by Stempeutics

Cipla Palliative Care Centre established in 1997



The Cipla Palliative Care Centre (CPC), Pune, India

Engaged with 8,100 terminally ill cancer patients, Palliative care aims to control pain and suffering and improve the quality of life of patients and their family, during regular curative treatment.

Training and counselling to patients' relatives

Trains doctors, nurses and medical social workers in palliative care

Cipla is “Caring For Life”



Cipla’s mission is to be a leading Global healthcare company which uses technology and innovation to meet everyday needs of all patients.

The Mother and Child statue that stands, full of compassion and hope, bears testimony to the corporate credo.



To health care professionals

Caring is providing world-class medicines and support across multiple therapeutic areas.

For business partners,

Caring brings the confidence of always getting world-class quality and competitive prices.

Affordability and accessibility

High standards of R&D, quality and manufacturing

For patients

Caring is a promise to ensure they have continued access to the highest quality medicines at affordable prices; whether a disease affects millions or just a few hundreds.

For the 20,000 employees of Cipla

Caring manifests itself in a safe, equal opportunities' workplace that fosters innovation for a healthier world.

Products for almost all therapy areas

Continuous innovation in drug delivery

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