



17th March 2021

The Secretary
Bombay Stock Exchange Limited
Phiroze Jeejeebhoy Towers
Dalal Street,
Mumbai 400 001

The Secretary
The National Stock Exchange of India
Limited
Exchange Plaza, 5th Floor
Plot No. C/1, G Block
Bandra-Kurla Complex
Bandra East,
Mumbai 400 050

Investor Webinar Presentation

Dear Sirs

We refer to our letter dated 24th February 2021 intimating you the details of the investor webinar which was scheduled today.

Pursuant to the Regulation 30 of the Securities and Exchange Board of India (Listing Obligations and Disclosure Requirements) Regulations, 2015, the presentation made by the Company at the investor webinar is enclosed for your reference.

Kindly take the above information on record.

Thanking you,

Yours faithfully

For SANOFI INDIA LIMITED

A handwritten signature in blue ink, appearing to read "Girish Tekchandani", written over a horizontal line.

GIRISH TEKCHANDANI
COMPANY SECRETARY



SANOFI 

Sanofi India Limited
17th March Investor Webinar

Sanofi India



~**INR 27.22 Billion** total net sales - India business including export (~**INR 5.7 Billion**)



SIL - listed company with ***INR 190 Billion** Market Capitalization



2900+ employees including **2,200+** commercial staff



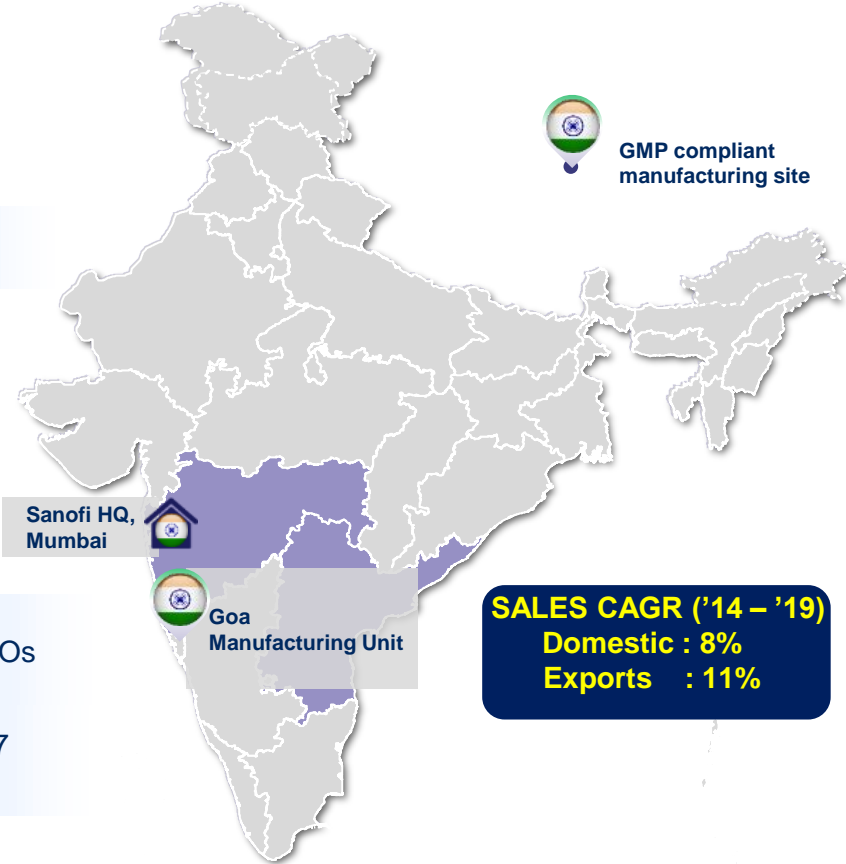
Pan India footprint - Sanofi reaching **2,500** distributors and **100,000** pharmacies



Strong Industrial presence: 1 Pharma manufacturing site, 18 CMOs



Strength of legacy brands: ~70% of SIL sales stemming from top 7 brands- well entrenched in stakeholder minds (HCP+patients)



SALES CAGR ('14 - '19)
Domestic : 8%
Exports : 11%

2020 focus on what we could control: 4-S

KEY PRIORITIES

1



SAFETY
of our employees
and partners

2



SUPPLY
of our medicines

3



SERVICE
to customers and
community

4



SKILLS
to win as we
transform

Key Business Priorities

1 

**Accelerate
Diabetes**

Focus on Growth

2 

**Selective & profitable
growth in Established
Products**

Accelerate efficiency

3 








**Build Consumer
Healthcare**

Lead with innovation

SIL portfolio and playground: Performance vs. Market

Despite Covid, key SIL brands' growth consistently outperformed market

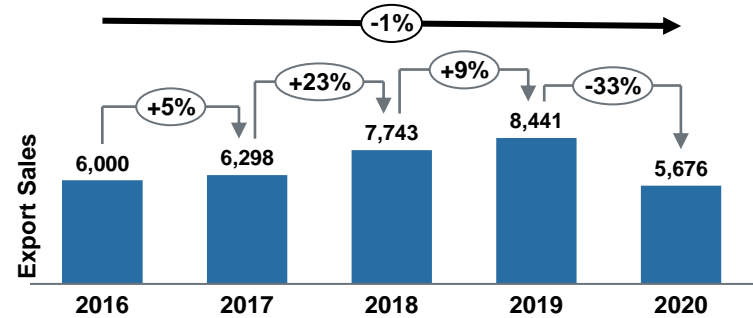
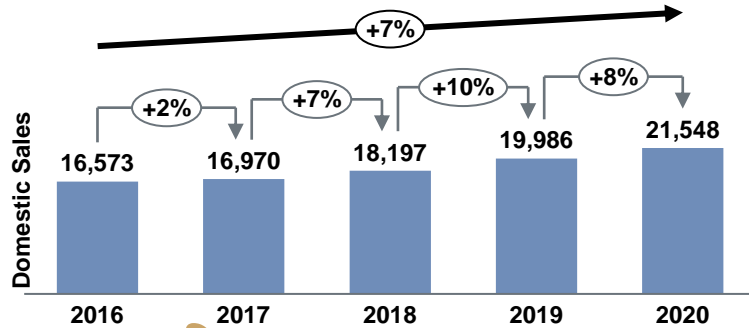
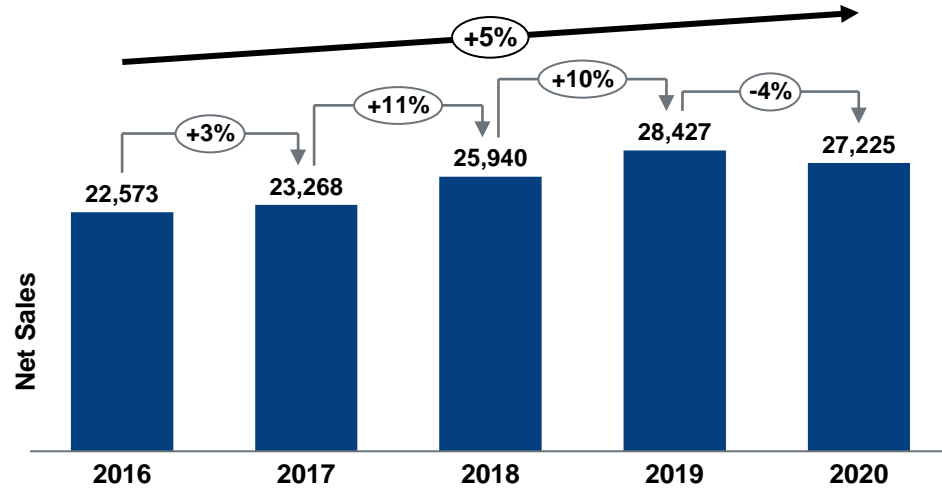
SIL remained insulated, posting higher than IPM market growth in 2020

SIL (Value Gr%)	MAT Dec'20	
	SIL	IPM
	8%	4%
Brand	Market	
	20%	8%
	9%	12%
	9%	-0.03%
	6%	-5%
	10%	6%
	-3%	11%
	-13%	-9%

Source: IQVIA Secondary Sales Audit, Period: MAT Dec 2020, Value gr%
Cardace and Amaryl are at group level

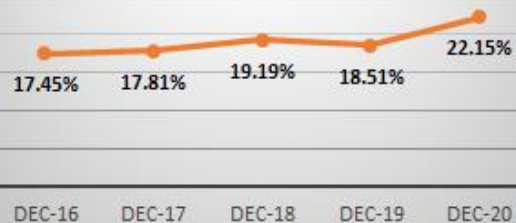
Highlighted in green = Brand growth higher than market growth

SIL Performance



Key ratios

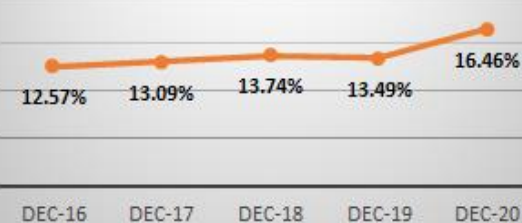
Operating Profit Margin



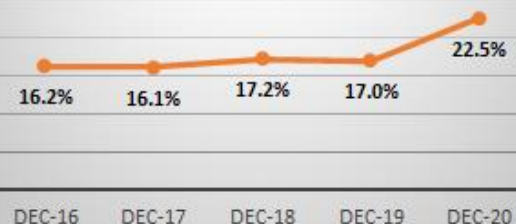
Profit Before Tax



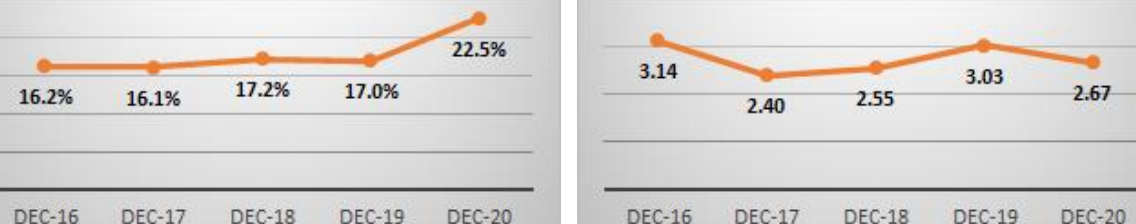
Net Profit Margin



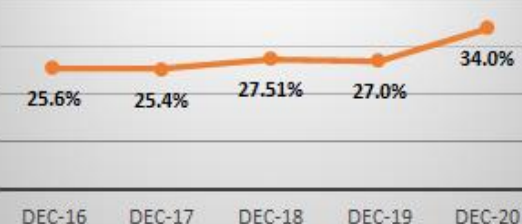
Return on Shareholders Fund



Current Ratio



Return on Capital Employed



Key Healthcare trends in India

1

Therapies

Chronic therapies are driving market growth 



2

Geographies

Lower tier markets witnessing higher growth



Growth:

- ✓ Tier 2-6 & rural markets >12%
- ✓ Metro/ class1 towns 2-4%

3

HCPs interaction

Pharma

- Preference for **Hybrid model** of interaction
 - 63% F2F; 21% Phone; 16% Online platforms¹
- Increasing **adoption of digital** channels



Patients

- Increasing **adoption Telehealth**
- 30% patients would opt for teleconsultation post lockdown also)³



4

Big jump in online pharmacies³

Use of online pharmacies

PRE COVID

7%

POST COVID

15%

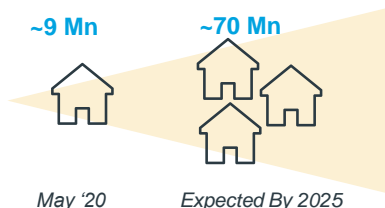
Cardiac and hypertension patients drive the trend for online pharmacies both during and post lockdown



Households using online Pharmacies

~9 Mn

~70 Mn



May '20

Expected By 2025

as per FICCI

5

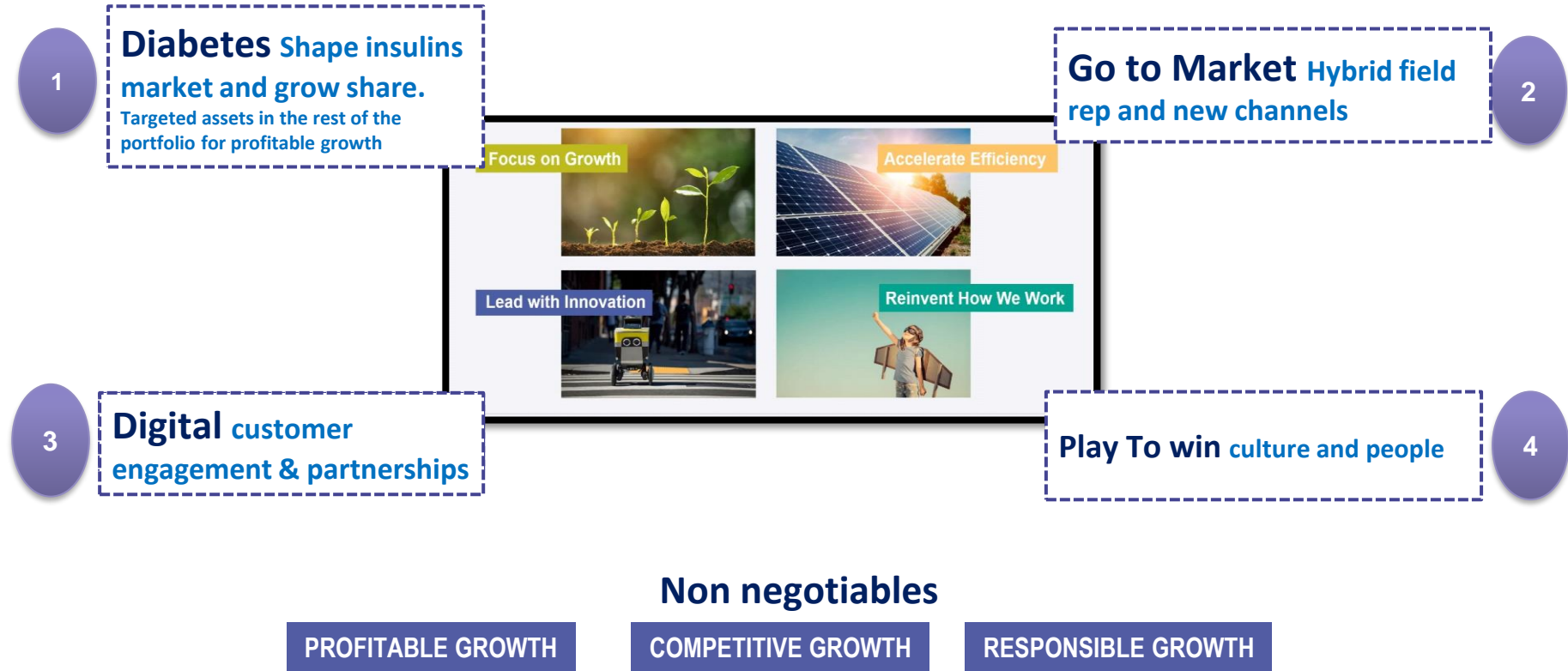
Regulatory environment



- >2X increase in Healthcare Budget in 2021
 - ₹94K cr → ₹223K Cr
- % GDP spend on HC increasing from 1.5% to 1.8%
- New scheme for nutrition & wellness
- Ayushman Bharat improving access
- NLEM revision this year
- Margin capping for Pharma

8

Sanofi India – Strategic pillars



Interactive Q&A

Thank You!