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s-a South Africa at a *glance*

Feb 2010

Global Antibiotic Resistance Partnership

CDDEP The Center for Disease Dynamics, Economics & Policy

Washington DC • New Delhi

best EMPLOYERS 2009/10 SOUTH AFRICA

AWARDED BY THE CRF INSTITUTE

Drive the transformation

Master the performance

The way to higher competitiveness

A Diversified Healthcare Company

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Vaccines[1]

sanofi pasteur
The vaccines division of sanofi-aventis Group

Sales: €2,861m, *+9.6%*

sanofi pasteur MSD
Sales: €1,272m, *+21.8%*
(non-consolidated)

Market Share: 21.8%

Rank: # 1

Rx Drugs[3]

Sales: €22,943m, *+2.9%*

Market Share: 4.8%

Rank: # 4

OTC / OTX[2]

Sales: €1,415m, *+5.3%*

Market Share: 2.1%

Rank: #6

MERIAL

Animal Health[4]

Merial sales:
(non-consolidated)
$2,643m, *+7.9%*

Market Share: 14%

Rank: # 3

Winthrop

Generics[5]

Sales: €349m, *+8.7%*

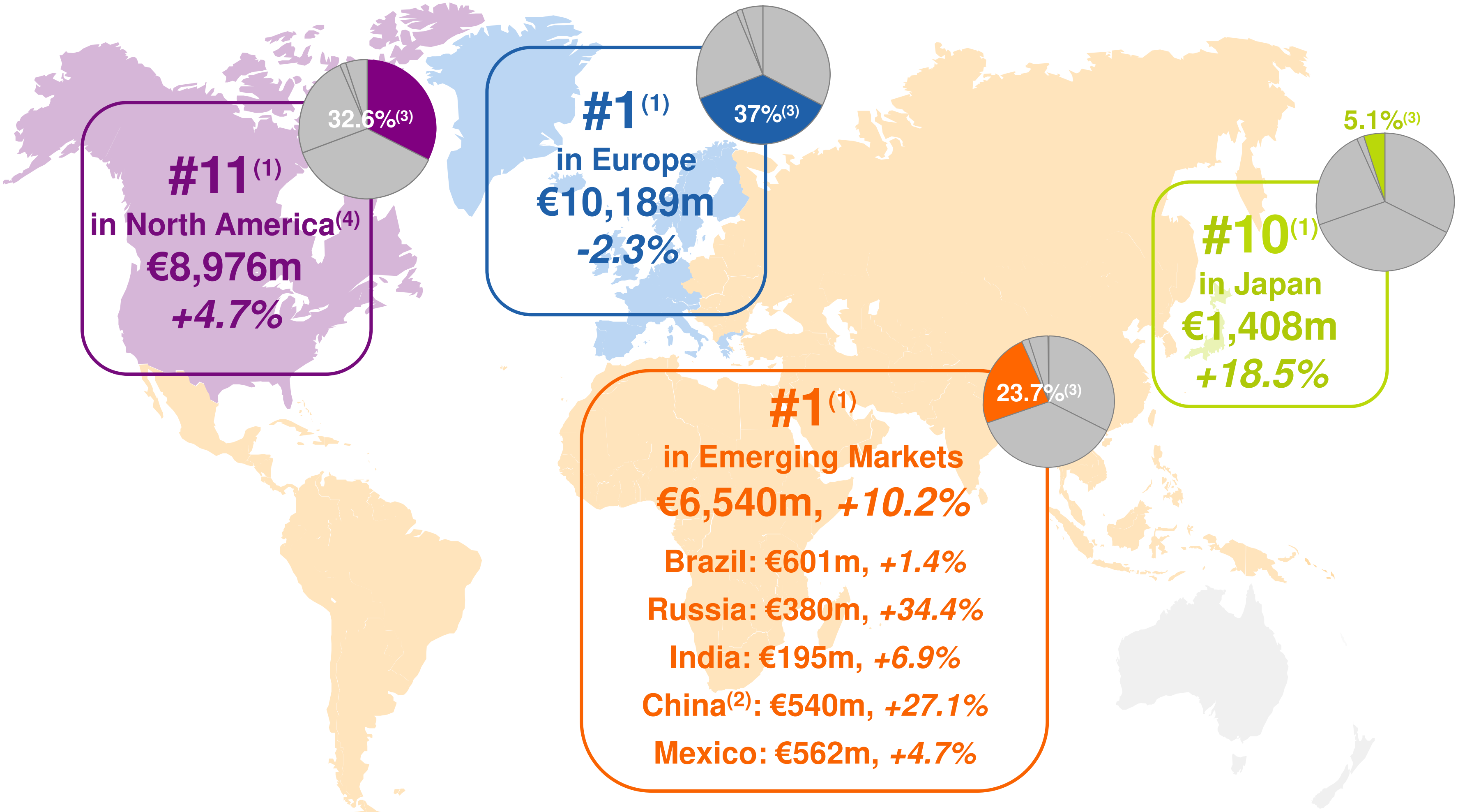
Market Share: <1%

Rank: # 23

Note: Sales figures correspond to FY2009 sales; growth is on a comparable basis except for SP MSD and Merial where growth is on a reported basis

(1) Vaccines market share based on sanofi pasteur internal estimate at the end of Dec 2009 and on worldwide presence including 50% of Sanofi Pasteur MSD joint venture sales
(2) OTC/OTX market share and ranking - source Nicholas Hall, 2009
(3) Rx Drug market share and ranking from internal analysis based on IMS MIDAS MAT Q3 2009
(4) Animal Health market share and ranking based on 2009 public data – Merial is a 50/50 joint venture with Merck
(5) Generics market share and ranking from internal analysis based on IMS MIDAS MAT Q3 2009

Well-Balanced Presence Between Traditional and Emerging Markets



(1) Ranking based on IMS MIDAS MAT Q3 2009, all available channels
(2) Greater China (China, Hong-Kong, Taiwan)
(3) Share of sanofi-aventis Group sales
(4) Excludes non-consolidated sales of Plavix® and Avapro®

Note: Sales figures correspond to FY2009 sales; growth is on a comparable basis

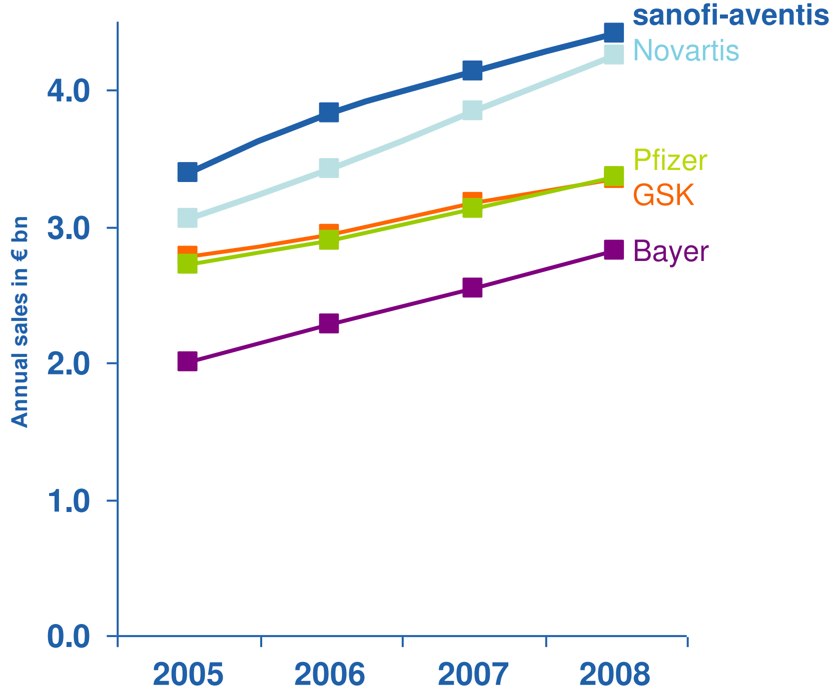
The Established Leader in Emerging Markets

- **Top positions in emerging markets(1)**

#1 in Brazil	#3 in South Korea
#2 in Russia	#3 in Turkey
#9 in India	#1 in South Africa
#4 in China	#1 in Algeria
#1 in Mexico	#1 in Morocco

- **Broad product portfolio in all relevant market segments adapted to local needs**
- **Manufacturing capabilities and clinical development units**
- **Potential pharma sales increase of around 50% in emerging markets by 2012**

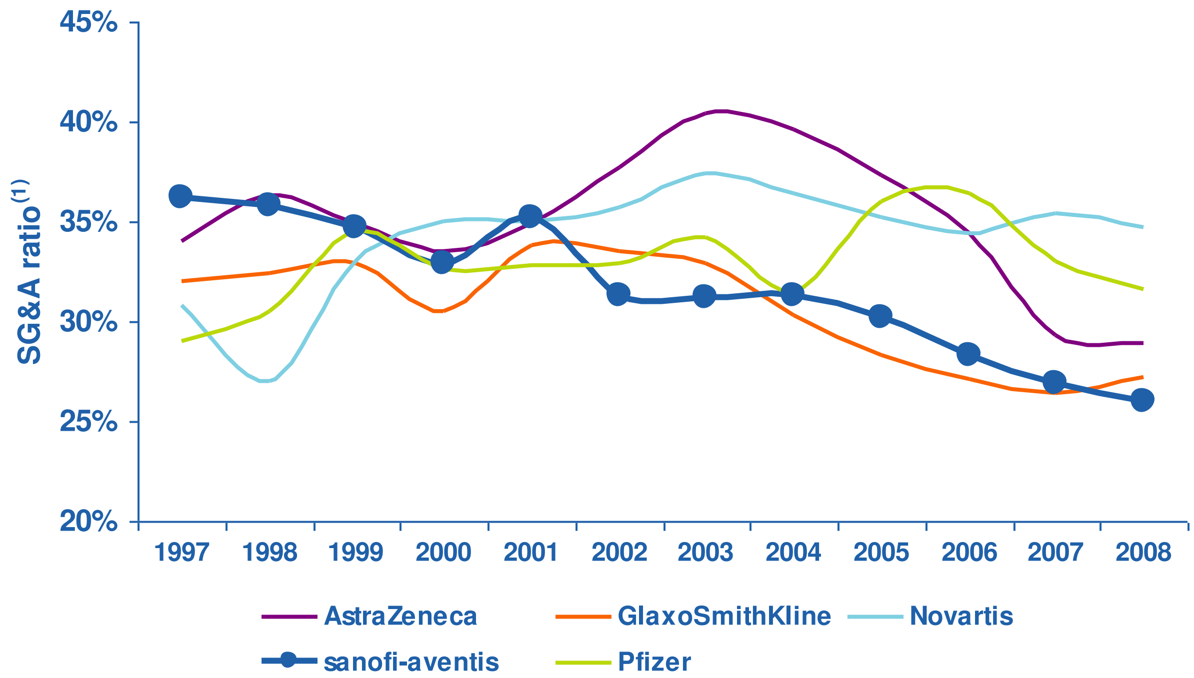
Emerging Markets Sales(1) (€bn)



(1) IMS MIDAS as of MAT Q3 2009. Emerging Markets = ROW + Eastern Europe + Turkey - Japan - Canada - Australia/New-Zealand

Among Best-in-Class on Cost Structure

- Continuous adaptation of production sites
- Alignment of sales forces with growth opportunities
- Ratio of net sales now among "best-in-class"



(1) Broker data

Our Strategy – relevant to South African needs

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Leading

Multinational In South Africa Private Sector

Rank	Multinational Company	Market Share %
1	**Sanofi-aventis**	**7.60**
2	Pfizer Labs	5.11
3	Astrazeneca	4.57

Source: IMS TPM MAT Dec 2009

3rd Leading Multinational In South Africa Public Sector

Rank	Manufacturer	Market Share %
1	Aspen	13.09
2	MSD	11.86
3	**Sanofi-aventis**	**8.89**

Source: IMS Hospitals MAT March 2008

Strong sanofi-aventis Presence In Public & Private Sectors

THE MOST DIVERSE MULTINATIONAL PRODUCT PORTFOLIO

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Disease Rank	Disease Area	sanofi-aventis Product	sanofi-aventis Disease Area Rank
1	**Tuberculosis (A15-A19)**	**Rifinah**	**1**
2	**Influenza and Pneumonia (J10-J18)**	**Orelox, Ketek**	**1**
3	Other Forms Of Heart Disease (I30-I52)	Lasix	2
4	**Cerebrovascular Diseases (I60-I69)**	**Plavix**	**1**
5	**Intestinal Infectious Diseases (A00-A09)**	**Tavanic, Targocid**	**1**
6	**Chronic Lower Respiritory Diseases (J40-J47)**	**Ketek**	**1**
7	Diabetes Mellitus (E10-E14)	Lantus, Apidra, Amaryl	2
8	**Ischaemic Heart Disease (I20-I25)**	**Plavix**	**1**
9	Certain Disorders Involving The Immune Mechanism (D80-D89)		
10	Hypertensive Diseases (I10-I15)	Aprovel, Tritace, Tri-Plen	3

Source: Mortality And Leading Causes of Death In South Africa 1997-2003;Stats SA

Top 20 s-a products
TARGOCID
CLEXANE
TAXOTERE
EPILIM
TAVANIC
LANTUS
PLAVIX
ELOXATIN
VIRALCHOICE
ORELOX
LASIX
DORMONOCT
ESMERON
KETEK
ESSENTIALE
CORDARONE X
STILNOX
APIDRA
TRI-PLEN
COAPROVEL

s-a employer of choice in the Pharmaceutical Sector in South Africa

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Attracts Skilled Pharmaceutical Sector Employees

- Rated as a "Best Employer" to work for in SA by Corporate Research Foundation for the 4th successive year

-Ranked position One for "Best Managed Companies by Industry Sector 2008/09: Pharmaceuticals"

-Rated as a "*Top Gender Empowerment Organization*" In 2008/9 by Top Women In Business And Government

- Ranked position Two by PharmaSales "Perception, Motivation & Values" Survey 2008

SA Pharma Industry: Antibiotic data

SA Manufacturer: Top 20 MAT Value ranking

MNF Name	MAT ZAR 2008	MAT ZAR 2009	Growth	MS%
Total Market value	**1,691,739,757**	**1,942,007,065**	**14.79%**	**100.00%**
SANOFI-AVENTIS	277,729,813	353,044,171	27.12%	18.18%
ASPEN P/CARE GEN	242,713,353	223,205,184	-8.04%	11.49%
ASTRAZENECA	114,455,982	148,840,491	30.04%	7.66%
SANDOZ SA (PTY)LTD	124,788,997	131,915,769	5.71%	6.79%
ASPEN GSK	106,456,697	131,147,462	23.19%	6.75%
BAYER SCHERING PHA	112,386,344	114,709,089	2.07%	5.91%
RANBAXY S.A.	79,927,566	97,481,928	21.96%	5.02%
MERCK SHARP DOHME	83,119,803	94,825,080	14.08%	4.88%
PFIZER LABS	70,533,650	93,004,998	31.86%	4.79%
B-M SQUIBB ETH	70,017,363	83,180,961	18.80%	4.28%
CIPLA-MEDPRO	36,769,147	45,558,972	23.91%	2.35%
ABBOTT	43,468,353	43,596,411	0.29%	2.24%
WYETH SA PTY LTD	26,010,561	38,509,162	48.05%	1.98%
ADCO-GENERICS	36,986,926	36,803,442	-0.50%	1.90%
ROCHE ETHICALS	31,821,641	36,021,932	13.20%	1.85%
PHARMASCRIPT PHARM	30,529,404	34,568,586	13.23%	1.78%
MYLAN (PTY) LTD	20,344,302	28,638,388	40.77%	1.47%
BE-TABS PHARMA	15,904,190	27,588,186	73.46%	1.42%

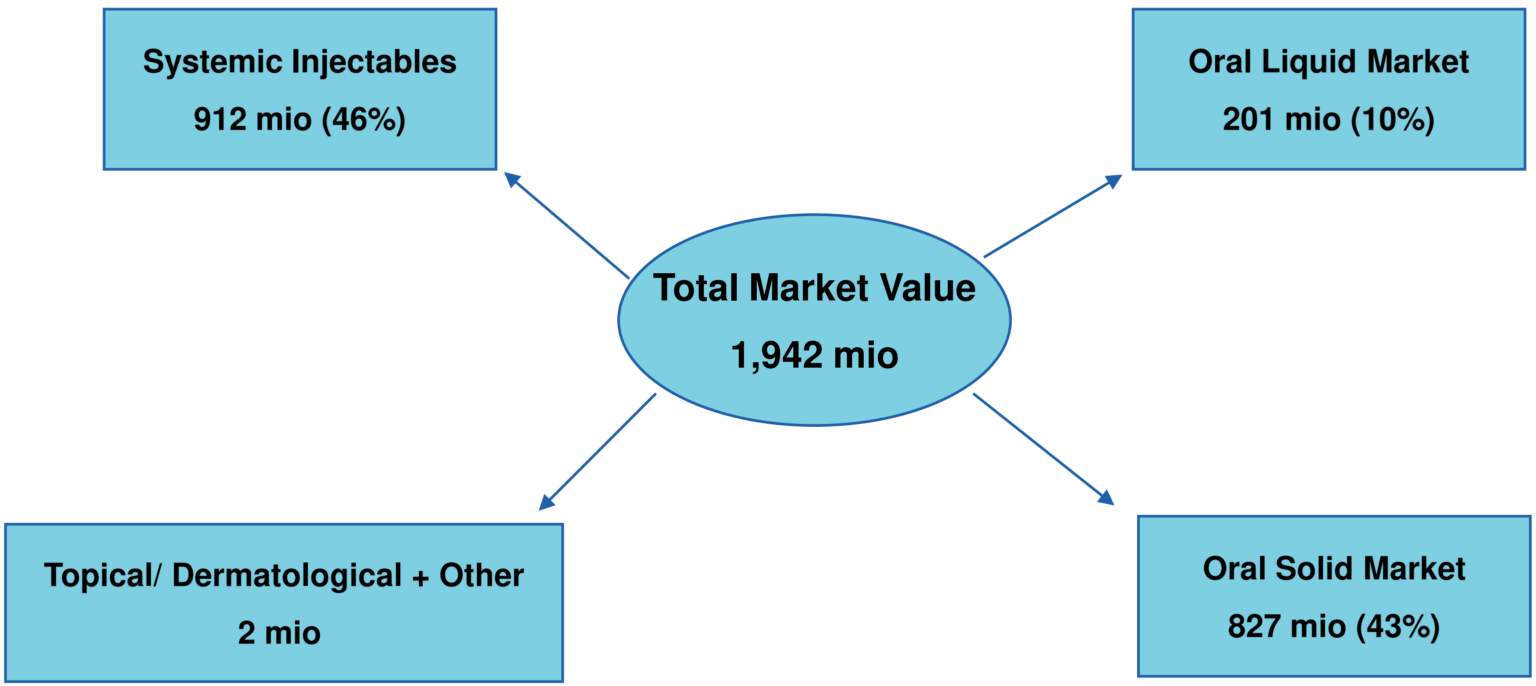
TPM Data- Dec 2009 MAT

SA Market Segmentation: Generic vs Non Generic

Segment	Value MAT_2008	Value MAT_2009	Value 09 vs 08
Selected Market	**1,691,739,757.00**	**1,942,007,065.00**	**14.79%**
GENERIC PRODUCTS	676,485,202.00	735,714,785.00	8.72%
NON GENERIC PRODUCTS	1,015,254,555.00	1,206,292,280.00	18.82%

TPM Data- Dec 2009 MAT

SA Market Segmentation by form



TPM Data- Dec 2009 MAT

SA Market: Top 20 Product Value Ranking

Product	MAT ZAR 2008	MAT ZAR 2009	Growth	MS%
	1,691,739,757	**1,942,007,065**	**14.79%**	**100.00%**
TARGOCID	128,821,264	180,849,957	40.39%	9.31%
MERONEM	114,455,982	148,840,491	30.04%	7.66%
AUGMENTIN GSK	78,748,328	105,287,708	33.70%	5.42%
TAVANIC	75,049,997	81,046,102	7.99%	4.17%
AVELON	74,058,500	78,039,466	5.38%	4.02%
MAXIPIME	48,696,989	61,995,559	27.31%	3.19%
INVANZ	43,859,130	52,577,775	19.88%	2.71%
ZYVOXID	35,032,686	49,331,079	40.81%	2.54%
SANDOZ CO-AMOXYCLA	34,351,146	43,515,537	26.68%	2.24%
TIENAM	39,260,673	42,247,305	7.61%	2.18%
ZITHROMAX	33,339,275	41,483,505	24.43%	2.14%
ORELOX	38,510,532	41,398,337	7.50%	2.13%
TAZOCIN	26,010,561	36,815,524	41.54%	1.90%
CIPROBAY	38,327,844	36,669,623	-4.33%	1.89%
AMOCLAN BID	29,935,858	33,090,779	10.54%	1.70%
ROCEPHIN	29,638,668	32,510,195	9.69%	1.67%
KLACID	30,871,230	31,917,629	3.39%	1.64%
KETEK	26,347,747	30,608,187	16.17%	1.58%

TPM Data- Dec 2009 MAT

Thank you