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# Driving Resilient Growth Through *Strategic External Manufacturing* and Global Supply Network Integration

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We are an *R&D-driven, AI-powered*  
biopharma company committed to  
*improving people's lives*  
and *delivering compelling growth.*

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## Our *Strategy*

***Time to elevate & accelerate***



2025-2030+

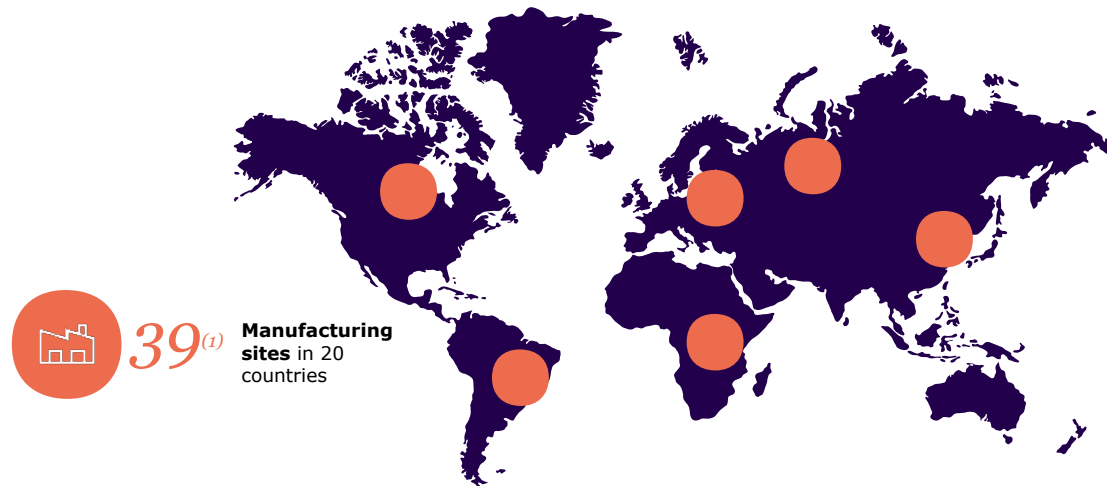
- Transformative launches at scale
  - Continue to build an innovative pipeline
    - Continue to modernize and deploy resources with agility
      - Driving sustainable growth as a result

# Manufacturing & Supply - a global network, supporting a diversified portfolio and offering a competitive advantage for Sanofi

## Mission

Turning the miracles of science into reality to deliver over 4 billion healthcare solutions to people all over the world every year.

Building build *a modern, industry-leading manufacturing* network that brings together *talented people, cutting-edge technologies, digital and data* to deliver high-quality, affordable and sustainable medicines and vaccines.



**Employees**  
29,000 globally



**Manufacturing sites**  
39 across the world



**Products**  
2.1 billion units  
produced annually



**Investment**  
€8.6bn by 2030

# Select potential transformative *medicines and vaccines*

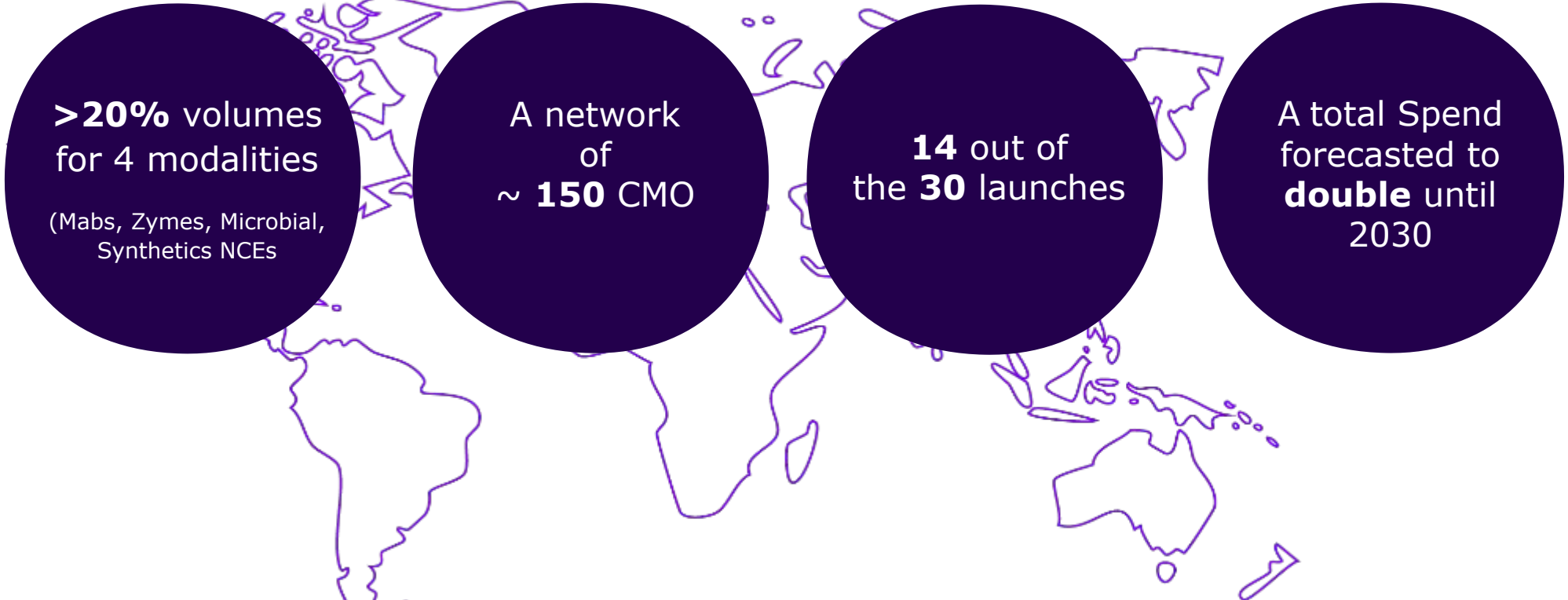
Pipeline Asset	Therapeutic Area
<i>tolebrutinib</i> (BTKi)	Multiple sclerosis (MS)
<i>rilzabrutinib</i> (BTKi)	Chronic spontaneous urticaria, Asthma, IgG4-related disease, Focal segmental glomerulosclerosis, Warm autoimmune hemolytic anemia, Immune thrombocytopenia (ITP)
<i>SAR444656</i> (IRAK4-degrader)	Atopic dermatitis, Hidradenitis suppurativa
<i>duvakitug</i> (TL1A mAb)	Ulcerative colitis; Crohn's disease
<i>RSV mRNA OA combo vaccine</i>	Respiratory syncytial virus (RSV), Human metapneumovirus
<i>Acne mRNA vaccine</i>	Acne
↓ Potential pipeline-in-a-product ↓	
<i>amlitelimab</i> (Anti-OX40L)	Atopic dermatitis, Asthma, Celiac disease Systemic sclerosis; Alopecia areata; Hidradenitis suppurativa
<i>frexalimab</i> (Anti-CD40L)	Multiple sclerosis (MS), Type 1 diabetes, Systemic lupus erythematosus, Focal segmental glomerulosclerosis
<i>balinatunfib</i> (Oral TNFR1si)	Rheumatoid arthritis, Psoriasis, Crohn's disease
<i>itepekimab</i> (Anti-IL-33)	Chronic obstructive pulmonary disease (COPD), Bronchiectasis, Chronic rhinosinusitis with and without nasal polyps
<i>lunsekimig</i> (Anti-IL13/TSLP)	Asthma, Chronic rhinosinusitis with nasal polyps, Atopic dermatitis



# *External Manufacturing & Supply, A Global Organization*

## Managing Sanofi Outsourced Products

**Our mission:** Manage & Coordinate outsourced Manufacturing Activities. Support Business growth, strategic launches & decisions. Anticipate and prepare the future with our people and on our CMO network.



>**20%** volumes  
for 4 modalities

(Mabs, Zymes, Microbial,  
Synthetics NCEs)

A network  
of  
~ **150** CMO

**14** out of  
the **30** launches

A total Spend  
forecasted to  
**double** until  
2030

# Resilience is now a growth strategy

The New Reality: Adapting to a Changing Pharma Landscape – Regulations, Manufacturing, and

## Market Dynamics

Pharmaceutical Contract Manufacturing Market size expansion from

\$99B in 2024 → \$156B by 2035  
(+ 4.3% CAGR)

Source: Roots Analysis

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### Regulatory Landscape

- ICH and GMP **Harmonization**
- MAH **Accountability** and **Foreign Site Scrutiny** in US, EU, Japan and China
- Data **Integrity** and **Traceability**



### Market Trends Manufacturing

- **Continuous manufacturing** for shorter cycle times, consistent quality and faster scale-up
- **Single-Use** improve overall quality
- **Downstream optimization**
- **Sustainable** packaging



### Market Trends Technology

- **Automated tools** improve overall quality and efficiency
- **Digital batch records** for data integrity
- **AI/Machine Learning** enable predictive control

# A Connected Model for External Manufacturing Success

*3 Levers  
of  
Resilient  
Growth*

**Partnerships**  
(New Chemistry Entity)

**Network  
Simplification**

**Digital-Enabled  
Governance**

# Strategic Partnerships: Anchoring Resilience in a Changing Pharma Landscape

*Transactional Outsourcing → Strategic Partnership*



*Joint capacity and continuity planning*

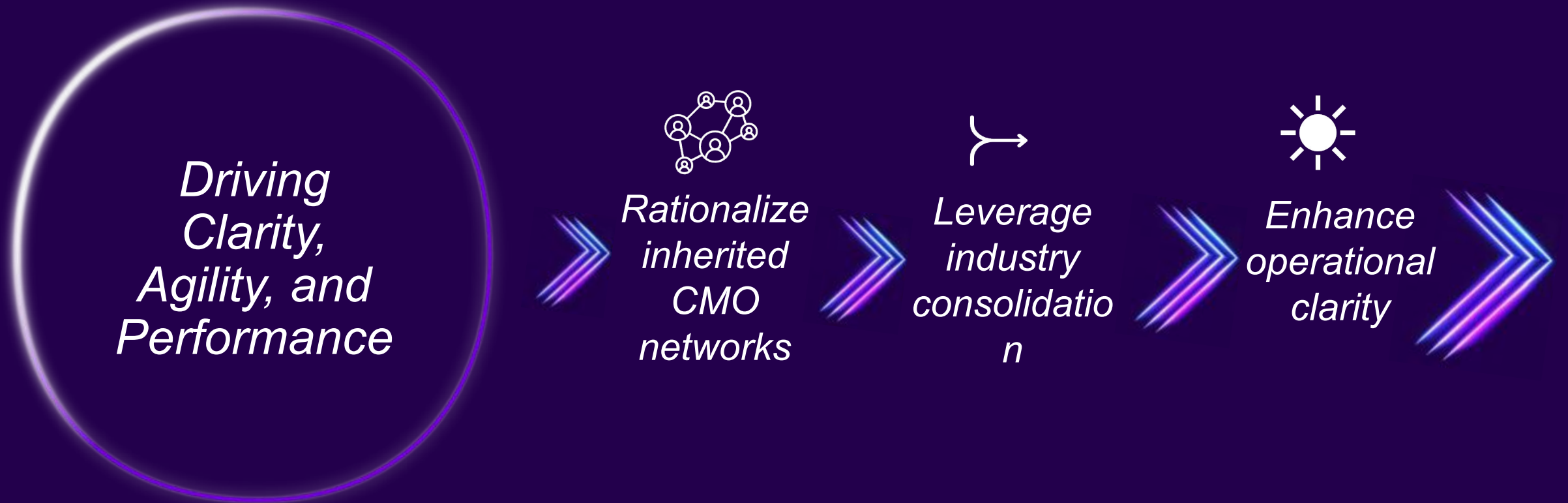


*Early engagement during tech transfer*

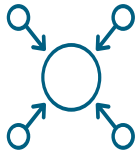


*Shared accountability for performance*

# Network Simplification



# Our Ambition & Challenges



## **The Simplification Journey: From Complexity to Focus**

*500 CMOs to 100 CMOs  
from 2015 to 2024*



## **The new model: Core Network-Tail Management**

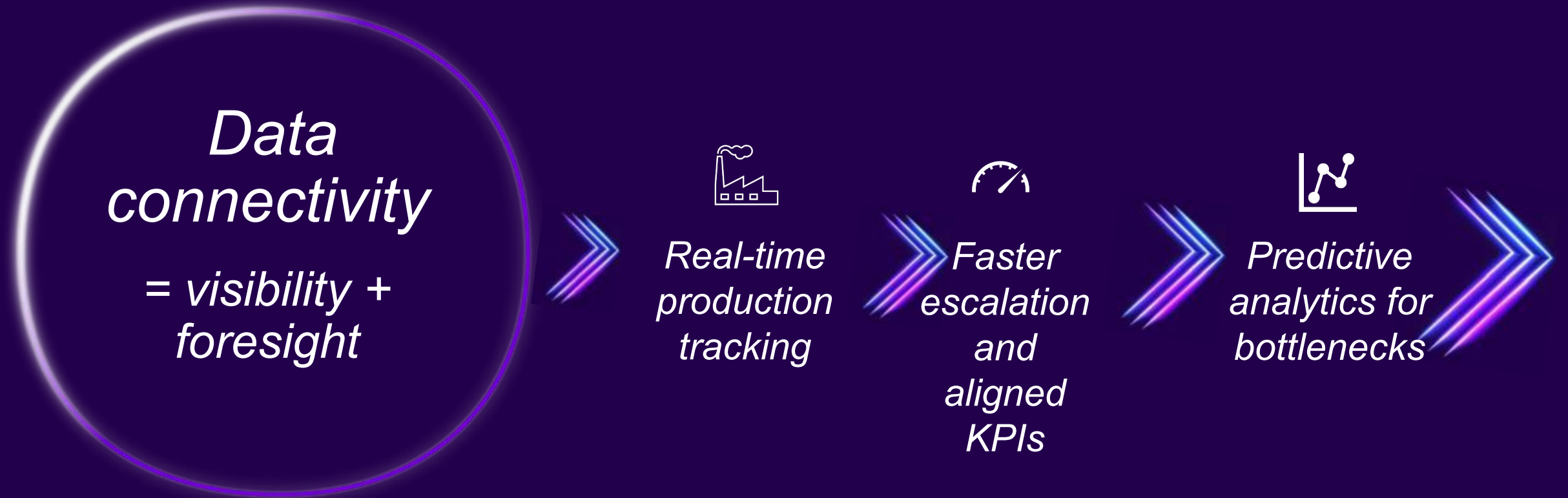
*1/3 CMOs with core model  
& 2/3 tail CMOs*



## **The Current Landscape: Growth and Complexity in Balance**

*Launches, BD, New sites integration  
- complexity remains across  
products and CMOs portfolio*

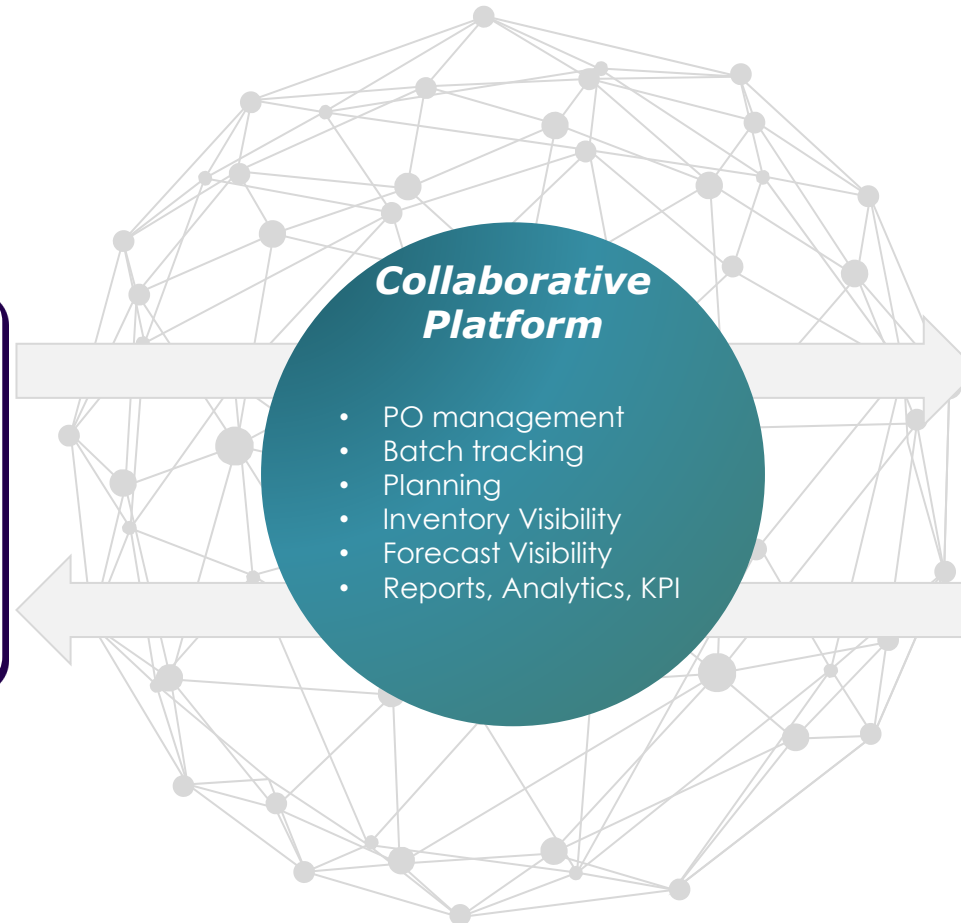
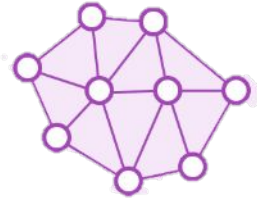
# Leveraging Digital Tools to Streamlining Operational Governance



# EM&S future digital Ecosystem

## Extensive enterprise collaborative connectivity ambitions

### EcoSystem



### *Collaborative Platform*

- PO management
- Batch tracking
- Planning
- Inventory Visibility
- Forecast Visibility
- Reports, Analytics, KPI



A woman wearing a black headscarf and glasses is looking out of a window. The background is slightly blurred, showing what appears to be an outdoor setting with some greenery and a building. The overall tone of the image is somewhat somber and contemplative.

*Our Patients are waiting  
for us.*

We must reliably launch and supply high-quality medicines and vaccines on time, all the time, every time helping people worldwide live better, healthier and longer lives.

# Questions & Answers

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Thank  
*you!*

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