

2026

Novartis in Austria Reimaging Medicine

 NOVARTIS



Novartis is an innovative medicines company

USD 10.3 bn

Core R&D spend in 2025 ¹



USD 54.5 bn

Net sales in 2025

¹ This presentation includes non-IFRS financial measures such as constant currencies and core R&D spend. A definition of non-IFRS measures used by Novartis, and further details, can be found in the Novartis Annual Report 2025.

Focus on Innovation: The History of Novartis worldwide

→ 1996	1999	2000	2001	2002	2003	2011
Sandoz and Ciba-Geigy merge to form Novartis	Genomics Institute founded in San Diego, California	Novartis and AstraZeneca merge agri-businesses to create Syngenta	The Campus Project begins in Basel Novartis Malaria Initiative launched with WHO	Novartis Institutes for BioMedical Research founded in Cambridge, Massachusetts	Novartis unites generics under Sandoz brand	Acquisition of Alcon
2015	2018	2019	2020	2021	2023	2025
Acquisition of GSK oncology portfolio; creation of GSK consumer healthcare JV Divestiture of animal health business	Acquisitions of AveXis, Advanced Accelerator Applications and Endocyte to expand gene and radioligand therapies platforms Divestiture of GSK consumer healthcare JV	Alcon spin-off	Acquisition of The Medicines Company to expand xRNA platform Since 2020: 140+ approved medicines in the EU, US, Japan, China	Sell of Roche stake	Sandoz spin-off Since 2023: 50+ strategic deals to advance our pipeline	In 2025, 300+ million patients reached

Our purpose and vision are supported by a strong culture with clear values

Purpose

Reimagine medicine to improve and extend people's lives

Vision

To become the most valued and trusted medicines company in the world

Values

Inspired. Curious. Unbossed. Integrity



Our strategy: Creating Value through Innovation, Science and Access to Medicines

Deliver high-value medicines that alleviate society's greatest disease burdens through technology leadership in R&D and novel access approaches

Focus

4 core therapeutic areas

Cardiovascular-Renal-Metabolic,
Immunology, Neuroscience, Oncology

2 + 3 technology platforms

Chemistry, Biotherapeutics
xRNA, Radioligand, Gene & Cell Therapy

4 priority geographies

US, China, Germany, Japan

Priorities

Accelerate growth and deliver returns



Deliver high-value medicines (including launch excellence)

Strengthen foundations



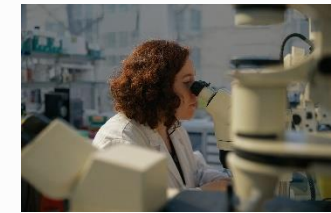
Unleash the power of **our people**

Scale **data science and technology**

Build trust **with society**

Execution

Delivering through operational excellence



Driving efficiencies and agile resource allocation

Improving R&D productivity

Millions of people worldwide benefit from our medicines

>300 m

Patients reached

with our medicines ¹



~120

Countries

where Novartis medicines are distributed



Delivering high-quality medicines

Our goal is to research new therapies for diseases such as cancer, heart diseases and neurological disorders and make them available on a large scale to reach as many patients as possible.

Highlights 2025 Austria

EUR 150 m R&D
invested costs

No. 2 in clinical trials in Austria with 42 clinical trials (Phase 1–4)

540 Scientists working across R&D in Austria

Highlights 2025 Novartis Global

36 ongoing Phase III
programs

29 submissions
(US, EU, Japan, China)

29 approvals
(US, EU, Japan, China)

19,000+ employees
working in R&D

 **NOVARTIS**



Novartis is one of the leading pharmaceutical company in Austria and one of the largest private employer in Tyrol

Company figures

 **2,5 bn €**
net sales¹

 **1.8 bn €**
investment² 2015–2025

 **6.3 %**
market share
(domestic),
market ranking #3³

 **150 m €**
R&D investment incl. infrastructure
measures in 2025 alone

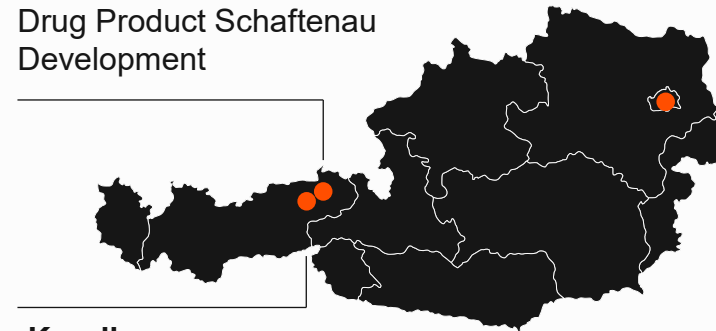
 **~3.300**
employees

 **No. 2 in clinical trials in Austria**
with 42 clinical trials (Phase 1–4) conducted in
Austria

Our locations

Schaftenau

Drug Substance Schaftenau
Drug Product Schaftenau
Development



Kundl

Drug Substance Kundl
Development

Vienna
Business Units
& Sales

Figures refer to 2025.

1) Annual sales according to statutory financial statements for Novartis Austria

2) Investments in property, plant and equipment (PPE)

3) IQVIA Data

Three sites in Austria



Kundl

Our competence centre for state-of-the-art microbial and cell culture technology, specialized in the development and production of innovative biologics (also, recombinant proteins, plasmid DNA and mRNA).

- Drug Substance Kundl
- TRD/Development/Biomedical Research



Schafftenau

Our central development and production site specialising in biotechnologically manufactured drugs – from research and development to active ingredients and final product manufacturing.

- Drug Substance Schafftenau
- Drug Product Schafftenau
- Technical Research & Development (TRD), Global Clinical Supply, Regulatory Affairs

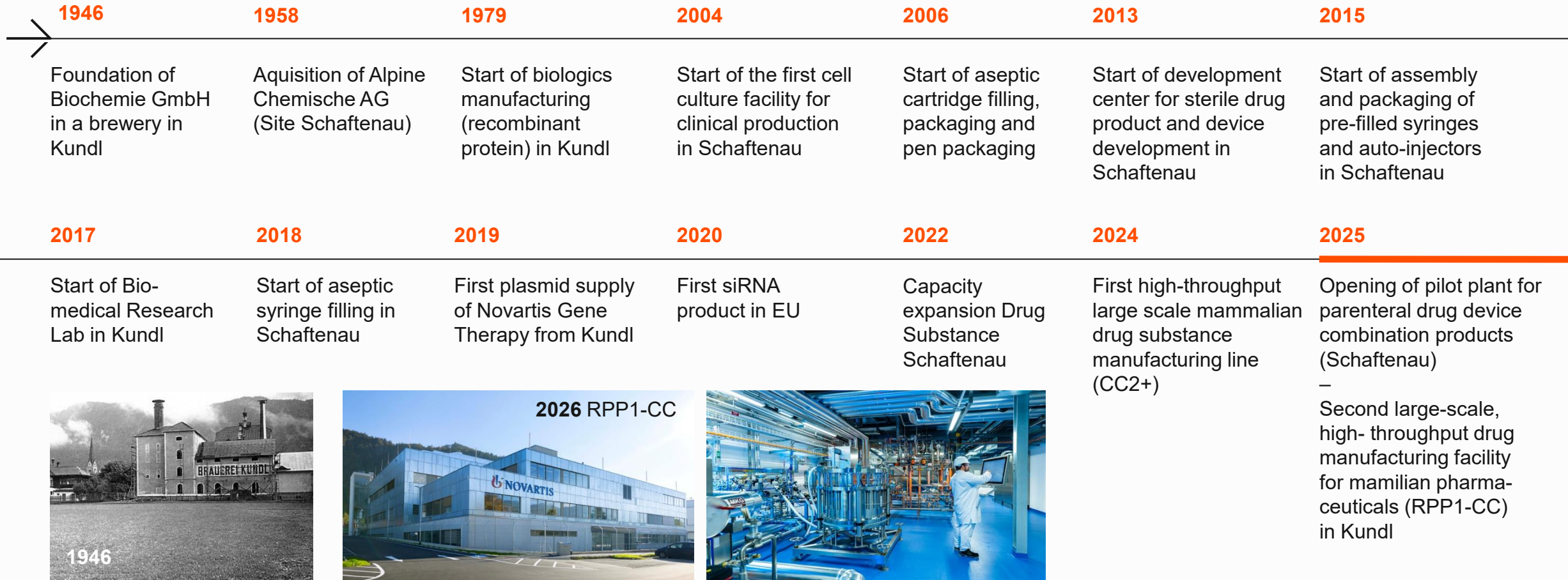


Vienna

Our commercial headquarters with business units in Marketing and Sales, including Quality and Regulatory Affairs.

Biotechnology innovations are part of our history

Since 1946 and 1958, Novartis Austria has repeatedly set medical milestones.



Development/Biomedical Research: Technical Research and Development, Regulatory Affairs

More than 25 years expertise in biologics & device development translating our science into dossiers for marketing approvals.



Kundl

Microbial end to end process and analytical development including Plasmid DNA for Cell & Gene Therapy



Schaftenau

Development of active substance and finished form manufacturing processes incl. patient-friendly formulation, analytics, device development and technical release of clinical batches



10+ Therapeutic Biologics Applications originates from Austria



15+ Patent applications in recent years



640+ Passionate and highly-skilled people

Drug Substance Kundl

In Kundl we produce high-quality biotechnological active ingredients and nucleic acid products. The site also provides comprehensive services as a global partner for contract development and manufacturing.

- 45+ years experience in microbial manufacturing of proteins
- Based on 3 pillars – commercial manufacturing of biologics, development services for biologics and infrastructure services
- 6 multi-product manufacturing areas with state-of-the-art equipment and facilities powered through advanced cell culture processes or microbial expression technology
- Significant investments in process technology & automation to enhance competitiveness – invested more than 500 mUSD between 2021 and 2026 in innovation to pioneer e.g. large scale plasmid DNA manufacturing
- Outstanding reliability in operations – zero contaminations in microbial fermentation from 2021 –25, outstanding performances in health authority inspections



Product Categories:

Therapeutic proteins, antibody fragments and full-length antibodies, enzymes, proteins for vaccines, plasmid DNA & mRNA



670+ Passionate and highly-skilled people

Drug Substance Schafftenau

In Schafftenau, we produce highly complex biotechnological active ingredients. The site offers reliable and efficient supply of clinical and commercial scale drug substance through innovative technologies, scaling efficiency and full support function integration.

- More than 300 produced large scale drug substance batches per year translate to hundreds of millions of drug product units supplied to patients in most world countries
- Clinical and commercial scale manufacturing, quality control testing for final market release, adventitious agents testing capacity and capabilities
- Advanced usage of online (PAT) monitoring technology, predictive process modelling and innovative culture processes; further investments planned in process automation to maintain competitiveness, e.g., automated Drug Substance filling and probe calibration



Product Categories:

Therapeutic Proteins and Antibodies

Services:

- (Intensified) Fed Batch Process
- High Density Perfusion Process
- Analytical Testing & Release
- Technical Transfer, Validation & Process Optimization
- Adventitious Agents Testing



~780 Passionate and highly-skilled people

Drug Product Schafftenau

Schafftenau is also home to finished product manufacturing. Drug Product refers to the manufacturing of a sterile pharmaceutical product, which is filled into syringes, vials, or cartridges and assembled and packed for safe and convenient application by the patient and stored for distribution.



- 50 million units of drug product supplied to patients in all major markets incl. US, CN, JP, EU → 5 trucks with innovative medicines leaving Schafftenau per day
- Creation of innovative and highly skilled jobs with manufacturing operating primarily in 24/7 shift operation



- Cutting-edge quality control labs for final market release in Austria
- Innovation and significant investments in process technology and automation to maintain competitiveness, e.g., automated visual inspection



Product Categories:

- Therapeutic proteins, antibody fragments, full-length antibodies, siRNA
- Microparticle manufacturing for sustained release



1.000+ Passionate and highly-skilled people

Research & Development at Novartis Austria



540

Scientists working across R&D, Novartis has one of the largest scientific communities in Austria's pharmaceutical industry



282

Patients included in clinical trials in Austria



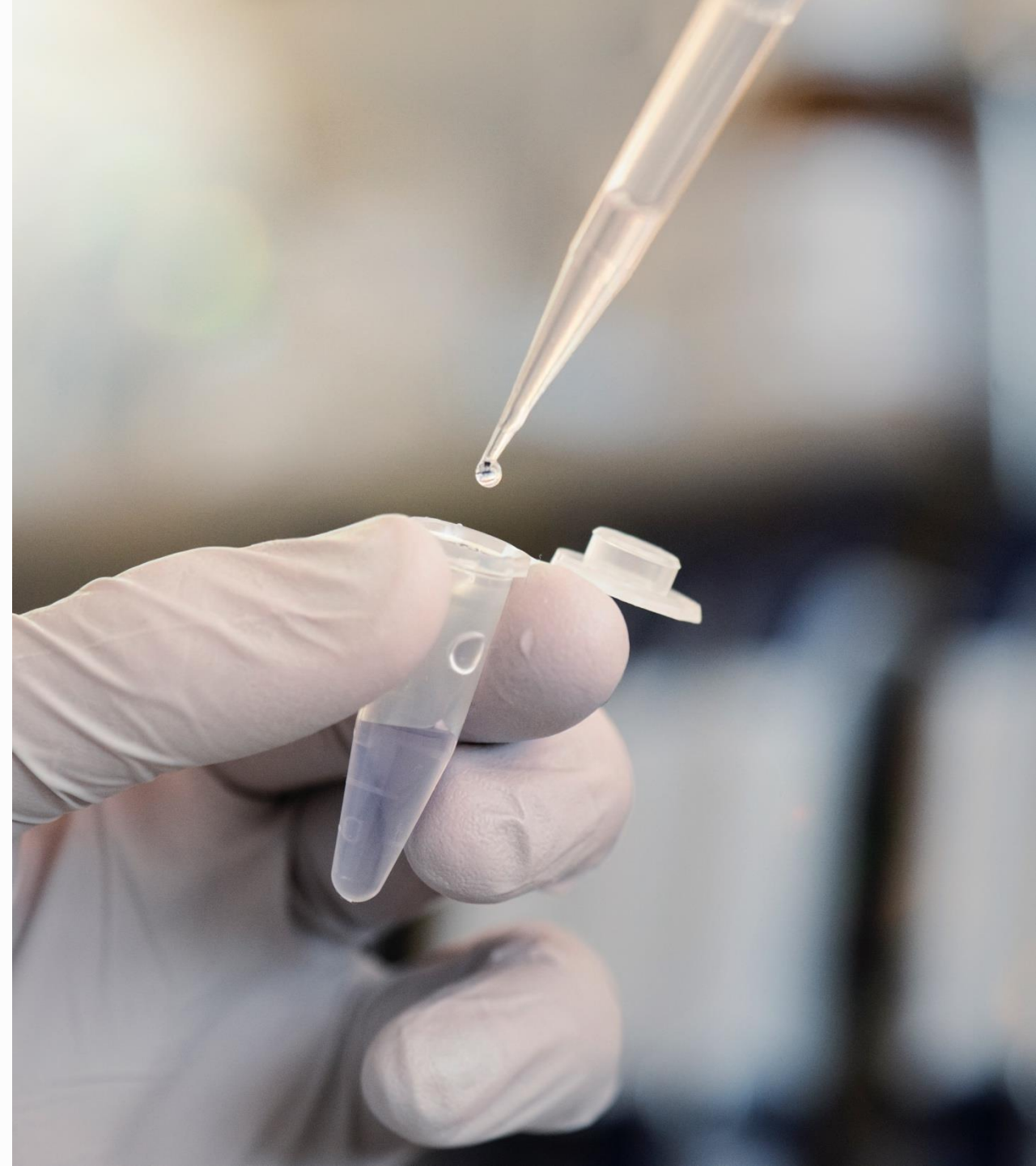
150 m

Invested costs in R&D (EUR) in 2025



56

Collaborations with different research institutions across the country

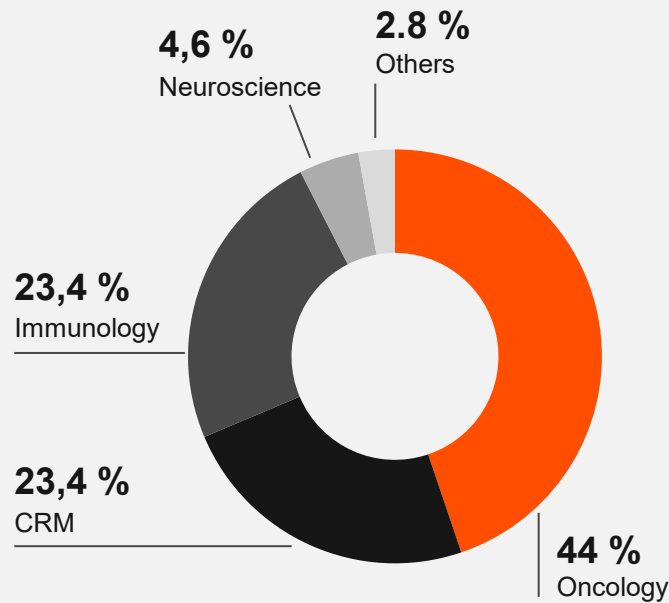


Novartis is among Austria's top clinical trial contributors No. 2 with 42 clinical trials across Phase 1–4

In 2025, 282 patients were in treatment in studies conducted by Novartis Pharma GmbH¹.

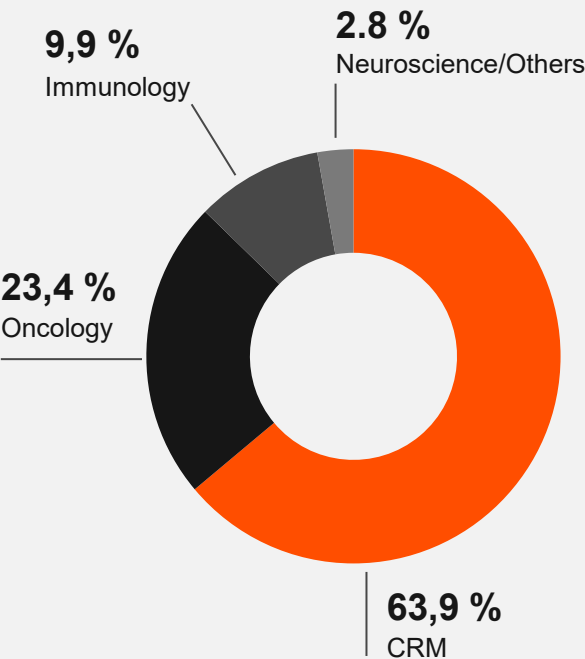


Trials 2025 per TA²



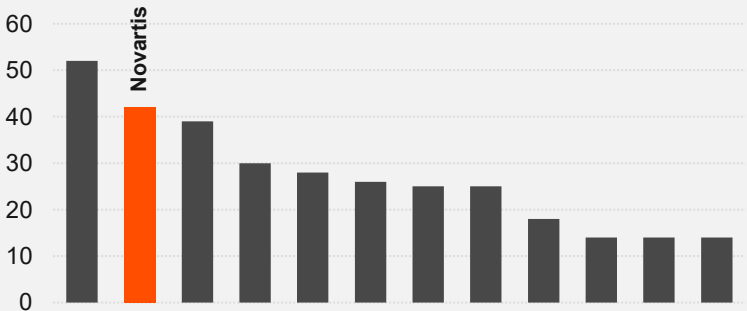
44 % of trials in Oncology indications
56 % of trials in Pharma indications

Patients per TA²



23.4 % of patients in Oncology indications
76.6 % of patients in Pharma indications

Number of clinical trials³



CRM = Cardiovascular, renal and metabolic
1) Novartis Clinical Vault (NCV)
2) Qlik Sense, 2026
3) clinicaltrials.gov, April 2026

Responsible action - measurable results

We aim to drive efficiency and free up resources to invest in innovation for patients. In everything we do, we maintain high standards of patient safety, while also working to reduce our environmental footprint.

- We are **number 1** in the **Access to Medicine Index**
- We are a **leader** in **key ESG ratings**¹
- **We have achieved the patient reach targets for our sustainability bonds** set in 2020

We have made significant progress in the area of environmental sustainability at Novartis worldwide²:

 **-75 %**

**Greenhouse gas
emissions**
Scope 1&2

 **-70 %**

**Waste
Disposal**

 **-59 %**

**Water
consumption**

¹ MSCI ESG, Sustainalytics, ISS ESG, CDP (Environmental Rating), and Access to Medicine Index

² Reduction compared to the 2016 baseline from 2016:



Sustainability at Novartis Austria

Social

- Possibility of 14 weeks paid parental leave in the first twelve months after the birth, adoption or placement in foster care, as well as flexible working hours
- Since 2020, the highest possible degree of choice between home office and office for employees
- Construction of the first barrier-free production facility in Kundl

Ecological

- Since 2014, 100 % of the electricity used at the Kundl and Schafftenau sites has come from renewable energy sources
- 71 % reduction in greenhouse gas emissions from energy in our own operations since 2016
- The new cell culture facility inaugurated 2025 in Kundl is the first to utilize innovative production technology on an industrial scale. Overall, the new plant consumes 40 % less thermal energy and 25 % less electricity
- Kundl and Schafftenau eliminated CO₂ emissions for thermal energy as of 2026
- Flagship project: Since 2026, the sites have achieved CO₂-free steam generation by replacing natural gas with electric boiler technology

Economical

- Key innovator in the Austrian healthcare industry and a strategic pillar of medical care with 42 conducted clinical trials (Phase 1-4) in Austria
- Investments of 1.8 billion EUR in Austria in the period 2015-2025 make us a significant economic driver
- Direct and indirect contribution to the country's gross domestic product (GDP) totalling 1.5 billion EUR

Diversity defines our culture

- Continuously ~ 90 apprentices in 5 different professions
- Award as an “Excellent Tyrolean Apprenticeship Company”
- Training apprentices since 1954 – with passion and a strong sense of responsibility in Kundl and Schafftenau
- 74 different nationalities at 3 locations
- 547 took paid parental leave
- 33% women in management positions
- 200+ wellbeing offers per year
- ‘Top Employer Austria’ for 7 years in a row incl. 2026
- ‘Top Employer Europe 2026’
- ‘We are inclusive’ award 2026
- University cooperation for the dual study program at the Management Centre Innsbruck (MCI)



Ausgezeichneter
Lehrbetrieb
2026 – 2028



Our commitment for patients and caregivers

We continue to build and maintain trusted partnerships with patient advocacy groups in Austria to better understand patient needs and support improved patient outcomes.

Some examples are:

- Listening to and understanding the patient community perspective
- Bringing patient perspectives into our work, including our approach to clinical trials
- Supporting initiatives that help improve access to medicines
- Ensuring transparency in our interactions and reporting



More Information about Novartis in Austria

Scan the QR-code
and visit novartis.at

