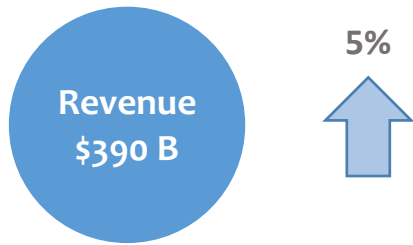
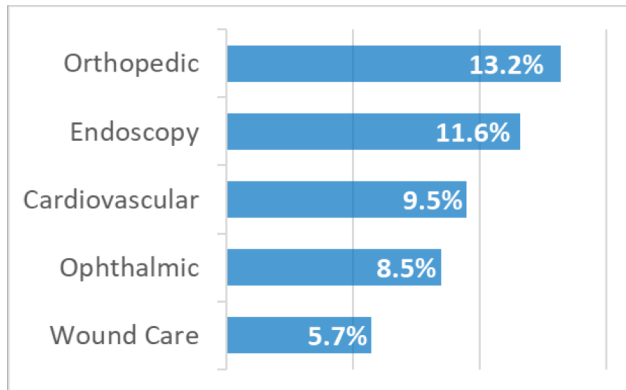


Global MedTech Industry Overview

2018 Est. Revenues and Growth Rate¹



Top Segments and Regions¹



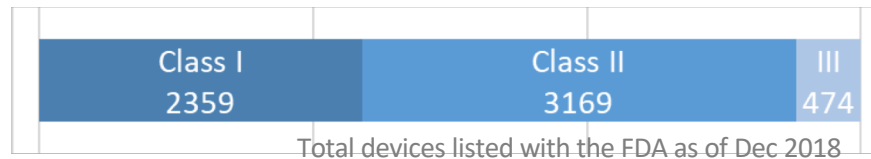
Top 5 Pure Play MedTech Leaders²

Medtronic	\$29.9 B	Cardiovascular, Surgery, GI/Respiratory/Brain/Spine restorative therapies, Diabetes
stryker	\$12.4 B	Orthopedic, surgical systems, endoscopy, neurotechnology, spine
Boston Scientific	\$9.1 B	Cardiovascular, endoscopy, peripheral interventions
ZIMMER BIOMET	\$7.8 B	Orthopedic, surgical, sports medicine, spine, facial reconstruction, dental, bone cement
Hill-Rom	\$2.7 B	Patient support systems, monitoring/diagnostics, surgical instruments

Top 5 Conglomerates with MedTech Business Segments³

Johnson & Johnson MEDICAL COMPANIES	\$26.6 B	Orthopedic, surgery, cardiovascular, eye health
PHILIPS Healthcare	€17.4 B	Personal health/wellness, imaging, ultrasound, patient monitoring, connected health
SIEMENS Healthineers	€13.6 B	Imaging, lab diagnostics, software solutions, consulting services
GE Healthcare	\$19.1 B	Imaging, ultrasound, patient monitoring, enterprise software
Abbott	\$14.5 B	Diagnostics, cardiovascular, neuromodulation

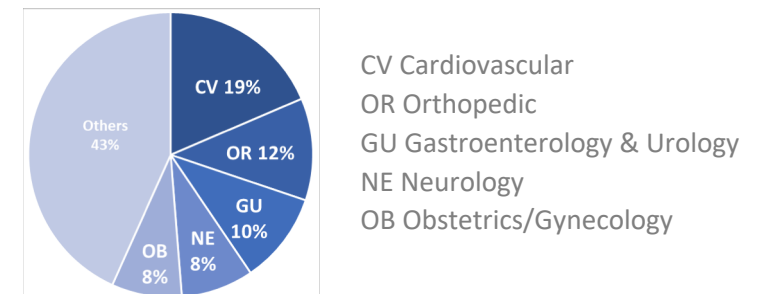
FDA Device Classifications⁴



Notes:

1. Frost & Sullivan, Global Medical Device Outlook 2018, Presented at AusMedTech (May 2018)
2. All revenues based on last FY annual reports (mostly 2017)
3. Revenue of MedTech business segments only. Does not reflect recent M&A, divestures and restructuring
4. FDA device classification data as of Dec 2018

Top 5 Class III Device Segments⁴



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