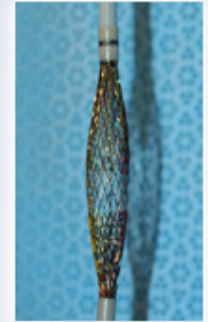
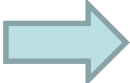

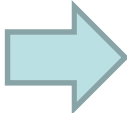


Medical technology in Europe

Key facts and figures



Key Facts and Figures

- Nearly 11,000 manufacturers  80% are SMEs
- 529,000 employees (European Union+ Iceland, Lichtenstein, Norway and Switzerland)
- Annual growth rate of approximately 6%
- EUR 5.8billion reinvested in Research & Development  8% of total sales
- Average life cycle of a medical device is 18 months
- Total medical devices sales in Europe is EUR 72.6 billion  nearly 33% of world market share (EUR 219 billion)

Medical Technology Sales Across the World

USA = €98.0 Billion (45%)
Japan = €23.1 Billion (11%)
China = €3.7 Billion (2%)
Brazil = €3.0 Billion (1%)

Key Facts & Figures - Employment

Country	Nº of Employees	% of European Total
Austria	6,000	1.4%
Belgium	5,500	1.3%
Czech Republic	12,760	2.9%
Denmark	14,000	3.2%
Finland	3,000	0.7%
France	40,000	9.2%
Germany	110,000	25.3%
Greece	2,500	0.6%
Hungary	4,250	1.0%
Ireland	26,000	6.0%
Italy	29,815	6.9%
Netherlands	9,500	2.2%
Norway	500	0.1%
Poland	8,700	2.0%
Portugal	3,200	0.7%
Romania	15,000	3.5%
Slovakia	2,198	0.5%
Slovenia	1,237	0.3%
Spain	25,400	5.8%
Sweden	15,000	3.5%
Switzerland	40,000	9.2%
United Kingdom	60,000	13.8%
Total Europe	434,560	100%

The same number of people who work in the medical technology industry live in the cities of Liverpool or Toulouse.

One out of every 500 European employees are employed in the medical technology industry.

Key Facts and Figures

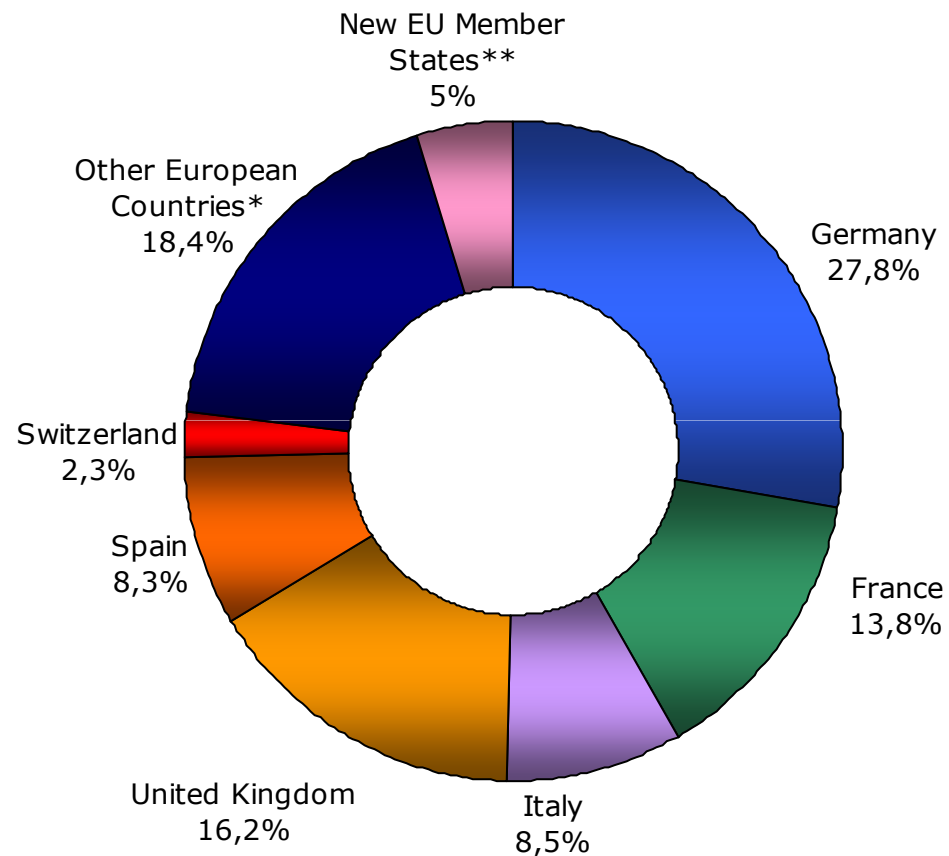
Economic Contribution

- ▶ Total sales of **€63.6 Billion** in 2006
- ▶ **1/3** of global medical technology market
- ▶ **Second largest** market behind the US
- ▶ Employed **435,000** people across Europe
- ▶ **11,000** companies, 80% of them Small and medium Enterprises

Scientific Contribution

- ▶ Major user of **Research & Development** services
- ▶ Up to **€3.8 Billion** spent on R&D in 2006

The Medical Technology industry in Europe: A Closer Look

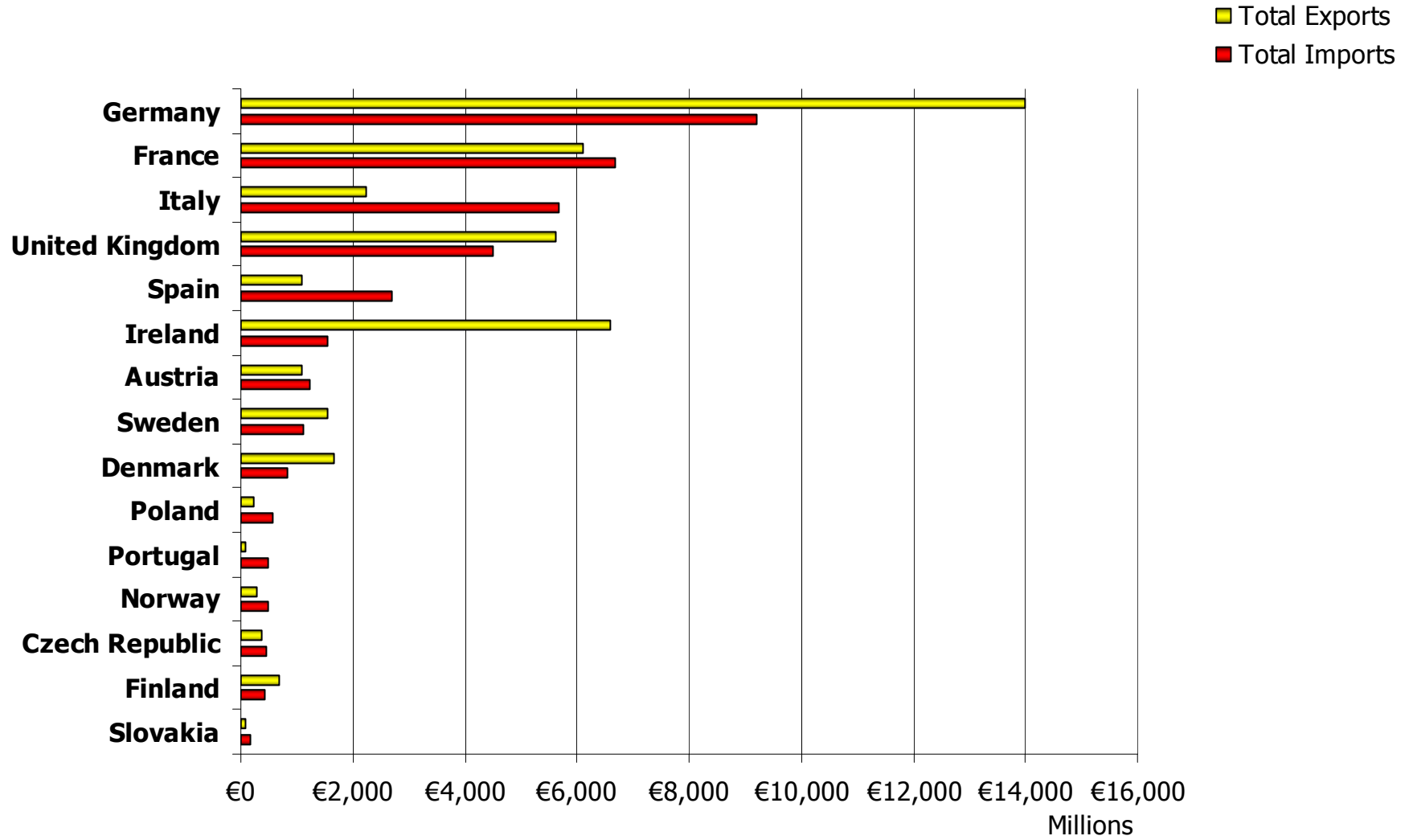


Percentage of Total European Medical Technology Sales (€72.6bn)

* Finland, Sweden, Denmark, Norway, Netherlands, Belgium, Luxembourg, Portugal, Austria, Greece, Ireland

** Estonia, Latvia, Lithuania, Poland, Czech Republic, Slovakia, Hungary, Slovenia, Malta, Cyprus, Bulgaria, Romania

European Medical Technology Imports & Exports



How do medical devices make a difference?

Since 1986, constant investments in medical technology have led to:

- Overall death rate **down 25%**
- Life expectancy from birth **increased by 4.3 years**
- Life expectancy for those **over 65 up by 12%**
- Mortality rates from **heart attack down by 50%**
- Mortality rates from **stroke down by 44%**
- Mortality rates for **breast cancer among women down by 18%**