



Global Orthopaedics
MD&D Business Review
Tuesday, January 22, 2013

The Global Orthopaedics business of DePuy Synthes is comprised of Joint Reconstruction, Trauma, Spine, Sports Medicine and Power Tools. DePuy Synthes Companies offers an unparalleled breadth of products, services, programs, and research and development capabilities that are designed to advance patient care and deliver clinical and economic value to health care systems throughout the world. DePuy Synthes leads the \$41B Orthopaedics and Neuro market with the largest and most comprehensive portfolio in the space. DePuy Synthes Companies offers products and services across eight businesses that focus on joint reconstruction, trauma, spinal surgery, sports medicine, neurological, cranio-maxillofacial, biomaterials and power tools. These businesses are managed in two groups: Global Orthopaedics and Global Neurological.

With approximately 19,000 employees worldwide, DePuy Synthes Companies has a presence in more than 60 countries around the world. The company generates nearly \$10 billion in annual revenue, operates 26 production sites and has 30 facilities worldwide. Principal offices are located in Raynham, Massachusetts, U.S.; West Chester, Pennsylvania, U.S.; Warsaw, Indiana, U.S.; Leeds, England; and Solothurn, Switzerland.

DePuy Synthes Joint Reconstruction

Founded in 1895, DePuy Joint Reconstruction (DePuy) is a global leader in joint replacement with a comprehensive portfolio of hip, knee and shoulder replacements, operating room products and bone cement and accessories. DePuy was the first orthopaedic company in the United States and since that time has consistently turned innovative ideas into medical devices that help restore patient mobility. DePuy has reshaped the orthopaedic landscape with leading products such as PINNACLE® Hip Solutions, the SIGMA® Knee portfolio and the GLOBAL® Shoulder portfolio. Soon, DePuy will be launching the ATTUNE™ Knee System, which is designed to maximize both stability during movement and range of motion. Other new technologies include the Anterior Approach, which is a less invasive alternative to traditional hip replacement and TRUMATCH® Personalized Solutions, which assists the surgeon with knee implant alignment.

DePuy Synthes Spine

DePuy Synthes Spine is the second largest spine company in the world with one of the most comprehensive portfolios of spinal care solutions that address key areas including thoracolumbar, cervical, aging spine, interbody fusion, arthroplasty and minimally invasive surgery. The company's leading solutions include comprehensive systems like the EXPEDIUM® Spine System and MATRIX™ Spine System to treat spinal conditions ranging from scoliosis to degenerative disc disease; the VIPER® 2 System for minimally invasive spine surgery; PRODISC®-C Total Disc Replacement and the ZERO-P® family of interbody fusion

devices to treat the cervical spine; a complete line of VBA™ instruments and implants, including CONFIDENCE SPINAL CEMENT SYSTEM®, Vertebral Body Balloon System (VBB™) and Vertebral Body Stent* System (VBS™) (sold only outside the United States) to treat vertebral compression fractures; and finally, a suite of biomaterial solutions.

DePuy Synthes Mitek Sports Medicine

DePuy Synthes Mitek Sports Medicine is a global leader in orthopaedic sports medicine devices and products used in the treatment of traumatic and degenerative soft tissue pathologies and joint injuries related to sports and physical activity. The company's portfolio includes non-surgical and minimally invasive therapies to help patients move beyond joint injuries and pain. Product lines include ORTHOVISC® (High Molecular Weight Hyaluronan) for the treatment of pain due to osteoarthritis of the knee; the OMNISPAN™ Meniscal Repair System; arthroscopic fluid management with the FMS Fluid Management System; the VAPR VUE® Radiofrequency System with COOLPULSE®90 Technology for tissue ablation; and a comprehensive range of tissue fixation devices for biomechanical knee, shoulder and elbow repair. The company also recently launched the ENDURANCE™ Hip System for hip arthroscopy.

Synthes Trauma

Synthes Trauma fixation products, including screws, plates, nails and other implants, are used to treat fractures and deformities related to the extremities and pelvis. The company is the global leader in medical devices used to treat orthopaedic trauma. Synthes Trauma revolutionized plating by being the first company to introduce locked plating. Synthes continues to innovate with a full line of anatomically focused Variable Angle Locked Plating and its newly introduced Dynamic Locking Screw (DLS™) System, which allows the surgeon to modulate the rigidity of locked plating constructs. Synthes Trauma also has developed a comprehensive range of nailing systems, most recently adding the new "screw-in-screw" technology found in the MultiLoc™ Humeral Nail. In 2006, the company entered into the clinical services and solutions arena with the establishment of the Synthes Geriatric Fracture Program (www.synthesgfp.com) to collaborate with hospitals and re-engineer the entire patient care process for elderly patients with hip and fragility fractures.

Synthes Power Tools

Synthes Power Tools offers a comprehensive range of air, electric and battery-driven systems and associated dissections tools. Synthes offers products in three main areas: Large Bone, Small Bone and High Speed. Large Bone tools, such as Air Power Line (APL™), Battery Power Line (BPL™) and Trauma Recon System (TRS™) are used mostly in joint replacement surgery and heavy duty trauma. Small Bone tools, including Small Battery Drive II (SBDII™), Small Electric Drive (SED™), as well as Electric (EPD™) and Air Pen Drive (APD™) Systems are designed for most trauma applications as well as cranio-maxillofacial surgery. High Speed Systems, including the XMax® and eMax2Plus Systems, are designed for neurosurgery, neurotology, spinal procedures and otolaryngology procedures.

Global Neurological

The company's neurological business includes Codman & Shurtleff, Inc. and Synthes Cranio-Maxillofacial (CMF). It also includes Biomaterials, which provides products and support to all the Neurological and Orthopaedics businesses.

Codman Neuro

Codman Neuro offers a broad portfolio of devices used to treat patients suffering from debilitating neurological disorders. The company is a global leader in neurosurgery, neurovascular intervention and neuromodulation. Product lines include the CODMAN[®] CERTAS[™] Programmable Valve for hydrocephalus, BACTISEAL[®] Catheter Systems to reduce colonization of gram positive bacteria, the MEDSTREAM[™] Programmable Infusion System for muscle spasticity, as well as comprehensive solutions for the treatment of neurological conditions requiring surgical intervention and critical care. Minimally invasive technologies for stroke prevention and management include the DELTAMAXX[®] Microcoil System and ORBIT GALAXY[®] G2 Microcoils, the CODMAN ENTERPRISE[®] Vascular Reconstruction Device (VRD) and Delivery System¹, and the REVIVE[™] SE Thrombectomy Device².

Synthes CMF

The global leader in cranio-maxillofacial devices, Synthes CMF offers a comprehensive portfolio of products for surgeons to treat patients who have sustained conditions affecting their face, head, neck and thorax. The portfolio includes the market-leading Matrix[™]Mandible System, Matrix[™]Midface System, Matrix[™]Neuro System and Matrix[™]Rib Systems. Innovative patient-specific implants allow Synthes CMF to work with surgeons and their hospitals to create precise, tailored implants for particularly challenging cases.

DePuy Synthes Biomaterials

DePuy Synthes Biomaterials provides a wide range of innovative products that complement the use of traditional metal implants in trauma, spine and cranio-maxillofacial surgical procedures. Our biomaterials assist orthopaedic surgeons around the world with their mission to repair, protect and strengthen the structural core of the human body. Notable Synthes Biomaterials' solutions include the market leading DBX[®] Demineralized Bone Matrix (DBX[®] is a registered trademark of the Musculoskeletal Transplant Foundation); Norian[®] Drillable, the first bone void filler in the U.S. cleared for drillability in trauma procedures of the extremities; CRANIOS REINFORCED[™] bone cement designed to resist cracking during the setting process in cranio-maxillofacial reconstruction procedures; the Expert[®] Tibial Nail PROtect[™]i (not available in the U.S.) coated with antibiotic-laden polymer developed to provide protection from bacterial colonization on the implant surface; and RapidSorb[®] Resorbable Fixation System, an implant for young children that resorbs after the cranio-maxillofacial bones have healed.

Education for Healthcare Professionals

Across all platforms and around the world, DePuy Synthes Companies is committed to supporting the medical community with world-class education. The ultimate goal of our professional education platform is to advance the standard of care for patients through ubiquitous access to continuous learning and progressive skills development.

DePuy Synthes Institute, LLC

Each of the operating companies is supported by a world-class professional education system in the DePuy Synthes Institute. Focused on providing training across a continuum of care to a wide range of stakeholders, the DePuy Synthes Institute creates innovative, tailored learning environments for anytime, anywhere education through on-line learning mediums, as well as in-person, hands-on and didactic events.

AO Foundation

The AO Foundation is a non-profit organization that is committed to excellence in the surgical management of trauma and disorders of the musculoskeletal system. The AO Foundation is a medically-guided, global network of orthopaedic surgeons aimed at improving patient care. Membership includes more than 10,000 surgeons in 100 countries who work to develop and improve principles, surgical techniques, implants and instruments as well as offer education courses around the world for trauma, spine, cranio-maxillofacial and veterinary surgery. Synthes provides the AO Foundation with support for Continuing Medical Education (CME) activities and for clinical and non-clinical research and operation of a product review and validation system.

At DePuy Synthes Companies we create inspired solutions that advance patient care. We listen to the needs of our customers, their patients and the marketplace to redefine innovation and deliver a broad array of quality orthopaedic and neurological solutions that go beyond surgical devices to include procedural solutions, programs and services. To learn more, please visit www.depuysynthes.com.

###

¹ HUMANITARIAN DEVICE (USA ONLY): The CODMAN ENTERPRISE® Vascular Reconstruction Device and Delivery System is authorized by Federal Law for use with embolic coils for the treatment of wide-neck, intracranial, saccular or fusiform aneurysms arising from a parent vessel with a diameter of $\geq 2.5\text{mm}$ and $\leq 4\text{mm}$. Wide-neck is defined as having a neck width $\geq 4\text{mm}$ or a dome-to-neck ratio < 2 . The effectiveness of this device for this use has not been demonstrated.

² EU only, not available in the USA

³ Not available in the USA