

The next level of profitable growth

Path to market growth and expanding workflow leadership

Segment Diagnostics

Meet the Management,
December 10, 2019



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Diagnostics – Building from a leading position

Strong positions ...

#2

Laboratory Diagnostics

#1

Automation¹

#2

Point-of-Care

... in an attractive market

€28bn+

Market Size² (2018)

>5%

Market CAGR (2018 – 2023) ²

... with global scale

300k+

Global Installed Base³

135+

Number of Countries³

¹ Automation refers to installed base of track-based automation systems (TLA, 2019 BBC Annual IVD Market Book) |

² 2019 BBC Annual IVD Market Book in USD and calendar year, excludes Molecular Diagnostics | ³ Internal data

Global healthcare trends are shaping the evolution of diagnostics market



Increasing demand for diagnostic tests



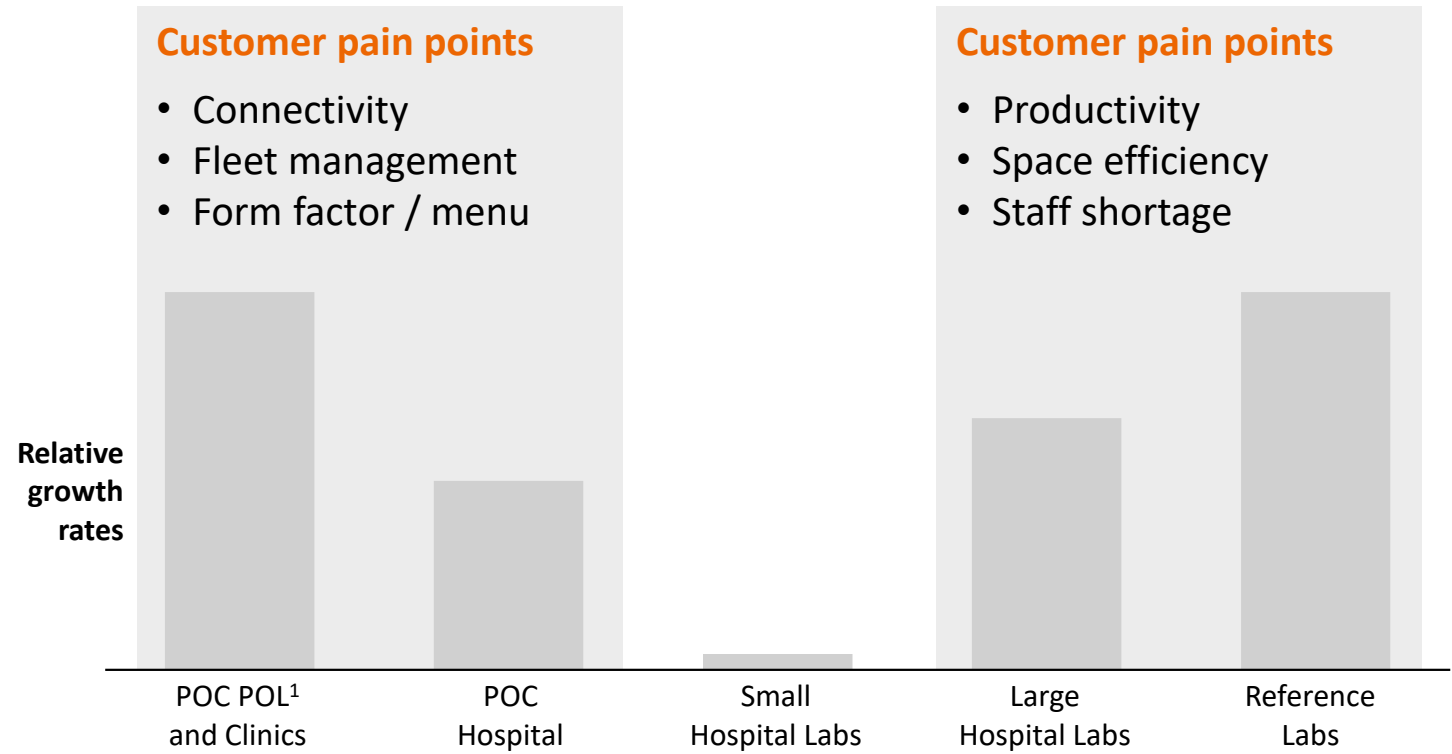
Consolidation and industrialization



Increased clinical integration



Bifurcation of the market



Siemens Healthineers has the broadest portfolio in the core lab and leading positions in key POC segments

Decentralized settings

Connected point-of-care solutions



Urinalysis



Blood Gas



HbA1c



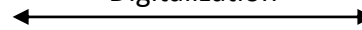
Cardiac



Informatics



Digitalization



Centralized settings

Automated, high throughput solutions



Dimension



Centaur



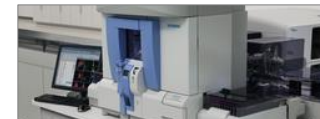
Immolute



Urinalysis



Atellica Solution



Hematology

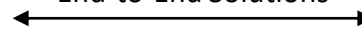


Automation/IT



Coagulation

End-to-End Solutions



Market segment leadership positions across a comprehensive and innovative portfolio



Automation¹



Coagulation



Plasma protein



Urinalysis



POC HbA1c



Note: The products mentioned herein are not commercially available in all countries

¹ Automation refers to installed base of track-based automation systems

Path to market growth and expanding workflow leadership

Strategic focus areas

- Automated, high throughput solutions
- Connected point-of-care solutions
- End-to-end solutions
- Data, Digitalization and AI



Roadmap for transition and growth

Grow

Expand

Elevate

Diagnostics accelerating towards mid-single digit growth

... by delivering on the promise of Atellica

- Manage product scale-up and technology
- Optimize installation processes
- Improve commercial execution

... by positioning ourselves for the future

- Expand range of Atellica Solution to additional segments
- Grow menu breadth and depth
- Drive POC innovation for market leadership

... with innovation in workflow

- Lead in workflow excellence and Data, Digital and AI
- Supported with increase in clinical value with unique tests and near patient insight

Atellica® Solution is our cornerstone to grow and achieve leadership in the diagnostics market

Grow Expand Elevate

Designed to meet evolving needs of customers ...



... with good uptake in the market ...



... and tangible customer impact

Highest immunoassay productivity¹



300+ customized configurations to meet individual lab needs



Advanced automated workflow to reduce manual interventions



Seamless integration of emergency and routine testing



>35%

Overall competitive win rate

Head-to-head wins vs. all major competitors across every laboratory setting



>80%

Mega Lab² competitive win rate with TLA³

The go-to solution for high volume, sophisticated requirements



73% less hands-on time⁴



33% fewer analyzers⁴



86% fewer operators⁴

¹ Based on tests per hour per square meter when compared to leading competitive modular immunoassay instrument | ² Labs processing in excess of ~30k tubes/day | ³ TLA = Total Lab Automation | ⁴ The outcomes obtained by individual Siemens Healthineers customers were realized in the customer's unique setting. Since there is no typical laboratory, and many variables exist, there can be no guarantee that others will achieve the same results

We will deliver new levels of productivity with Atellica and digitalization of the clinical lab

Grow

Expand

Elevate

Guardian Program®

AI pattern recognition for predictive monitoring



Intelligent Service Assistant

Fast AI enabled troubleshooting



Drawer Vision System

Machine learning of 7,500 tube features for tube handling



Tube Characterization System

Deep learning that identifies tube and adjusts aspiration to avoid jams



Atellica Solution has Artificial Intelligence built-in



We are rising to the challenge of delivering game-changing innovation

Grow

Expand

Elevate

There is a **definitive action plan** to realize **Atellica's maximum potential**

Drive continuous improvement



Optimize installation and go-live



Sharpen commercial execution



We are making **clear progress** and realizing **impact** of our actions

45%

Reducing overall service effort¹



47%

Streamlining implementation time²



>35%

Maintaining overall competitive win rate



¹ Reduction in annualized cost of service support since April – June 2019 application of hardware and software updates (Data as of Oct 1, 2019) |

² Improvement in implementation time of new installations since Q1 FY18

Atellica Solution is the first step to expand our position in the centralized lab

Grow **Expand** Elevate



Workflow Excellence

Clinical Excellence

Improved sample handling



Integrated sample management suite

Standardized results



Mid-volume integrated IA/CC

Higher productivity



High volume CC

Workflow Excellence

Clinical Excellence

Scalable IA/CC solution

Lead in selected disease states

In point-of-care, we will deliver innovation to grow in the most attractive segments

Grow **Expand** Elevate

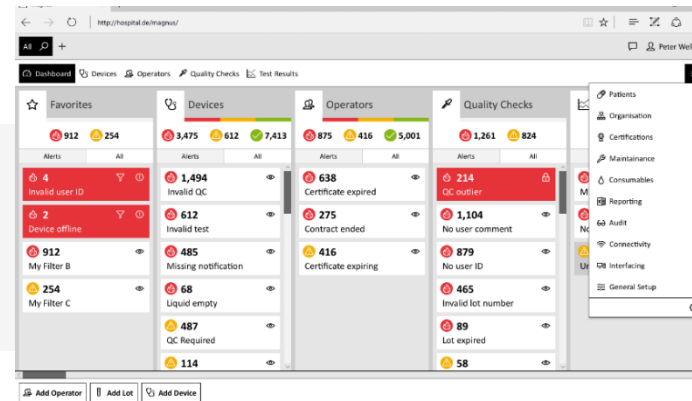
Accuracy, confidence, and outcomes

RP500e¹ blood gas analyzer



Optimized point-of-care workflows

POCcelerator 5.0



End-to-end cardiac immunoassay testing

MiniCare² (handheld)



1 Not commercially available in all countries; future availability cannot be guaranteed |
2 Under development and not yet commercially available; future availability cannot be guaranteed

Diagnostics has a strong starting position to deliver the lab of the future

Grow

Expand

Elevate

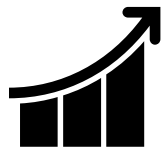
We will build on Diagnostics' unique foundation and capabilities ...



Workflow leader



Digitalization and AI pioneer



Comprehensive, scalable solution provider



... to elevate our performance and deliver the Clinical Laboratory of 2025

Industrialized ...

- "One touch" lab
- Multidisciplinary
- Consolidated menu



Digitally enabled ...

- Advanced lab analytics
- AI-enabled operations
- Clinical decision support



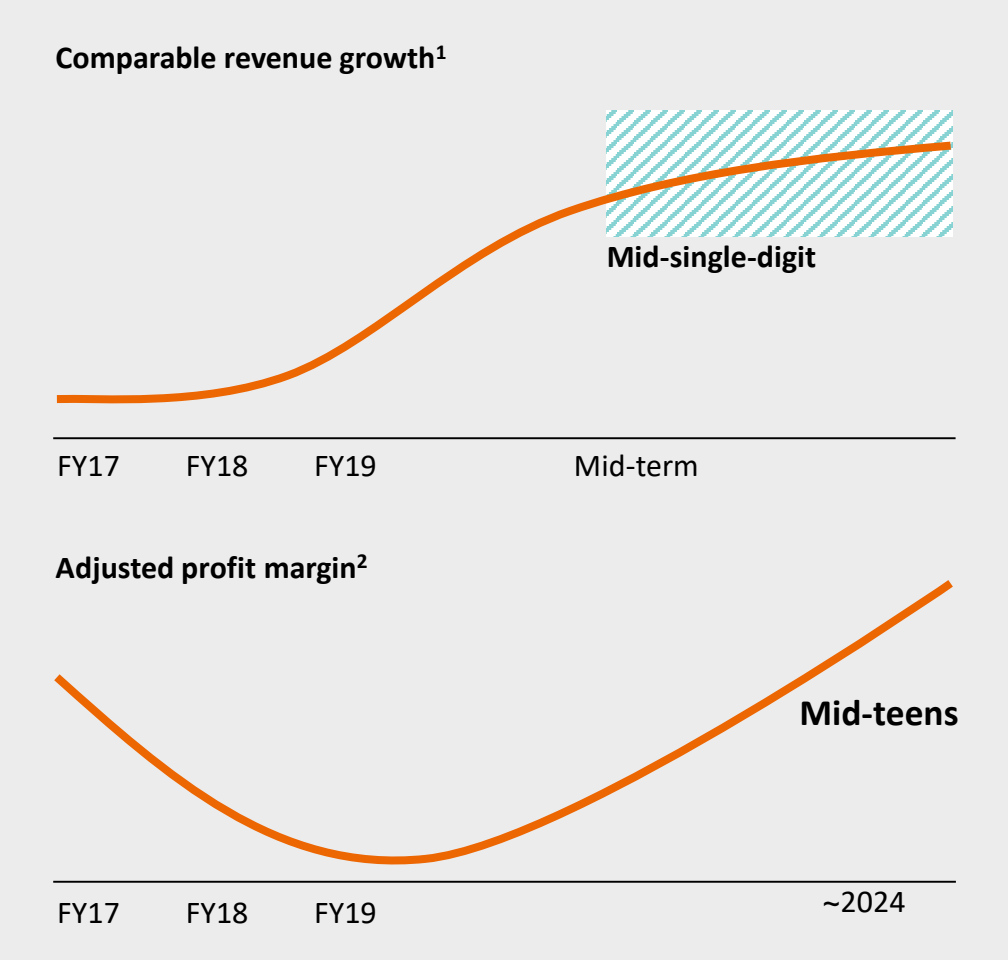
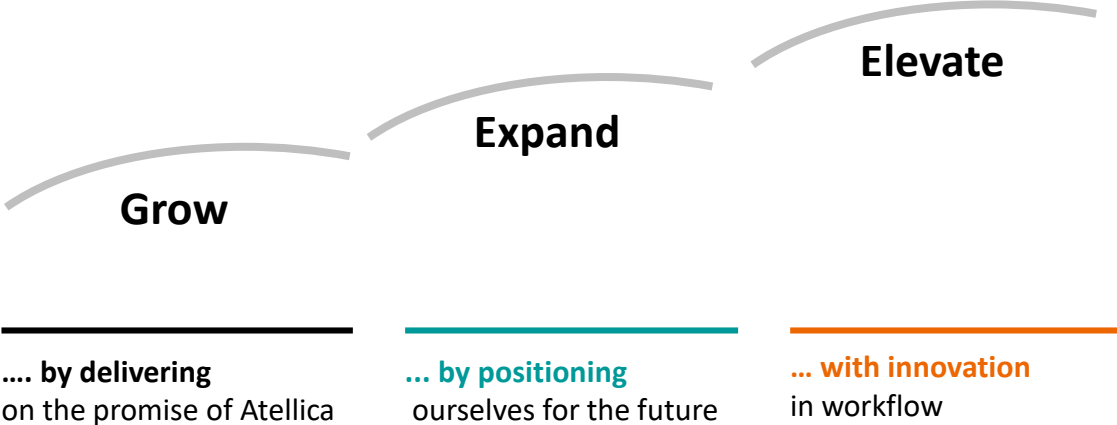
Harmonized...

- Concordance from central lab to point-of-care
- Data integration
- Continuity of care



Diagnostics is on a solid path to become a top-tier performer

Roadmap for transition and growth



¹ Y-o-y on a comparable basis; excluding translation and portfolio effects | ² Adjusted for severance charges, in fiscal year 2018 additionally for IPO costs | **Graphs:** For illustrative purposes only

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Segment Diagnostics



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There future availability cannot be guaranteed

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