



Adapting to new realities

Webcast for investors, analysts & media

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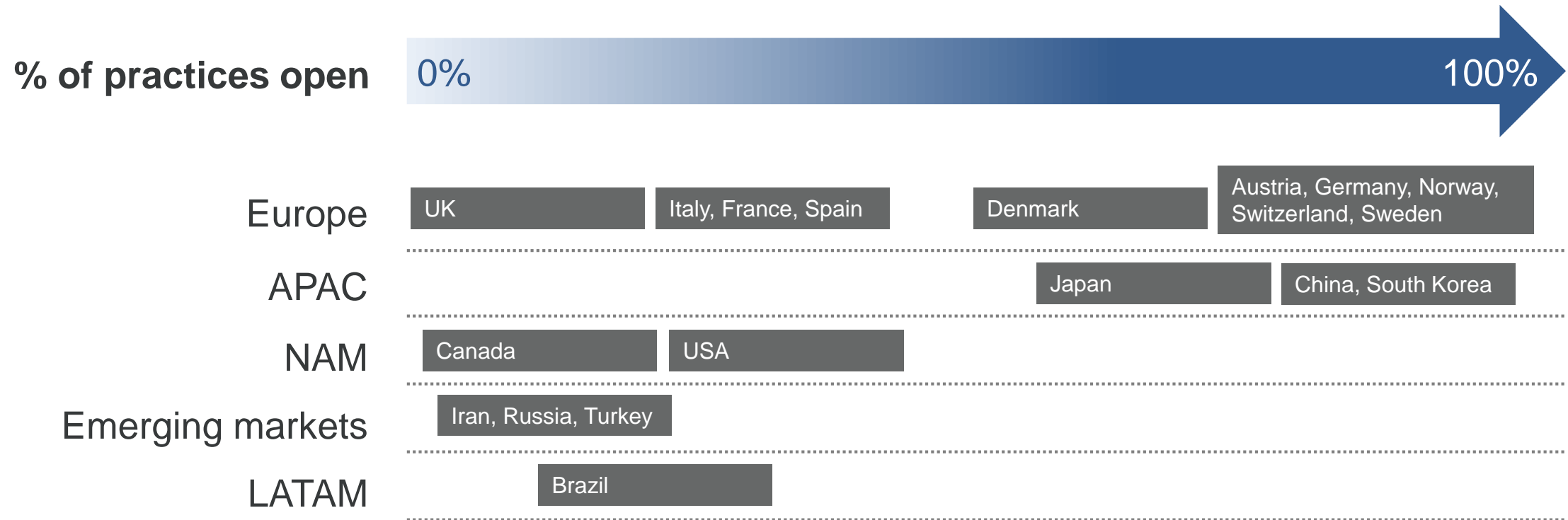
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Today's announcement in a nutshell

- Group plans a 9% reduction in its global workforce this year to align costs with lower revenues due to pandemic and recession
- Straumann commits to managing the reduction process in a responsible, timely and fair manner
- Business fundamentals remain valid; resizing will not compromise company's ability to innovate, manufacture, supply and sell winning solutions, nor to bounce back quickly and strongly

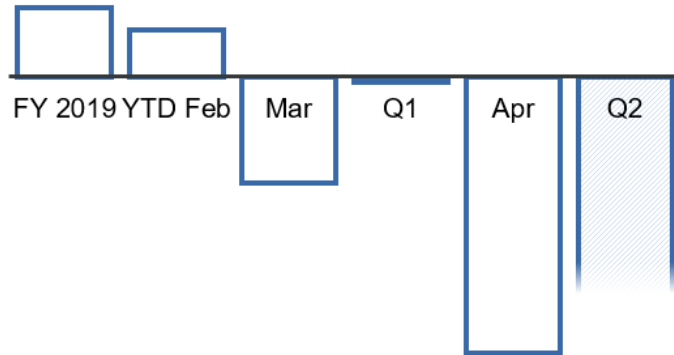
Dental practices taking time to open for non-essential treatments

Status: 11 May 2020
(major countries)



Strong momentum interrupted – recession will prolong time to recovery

Straumann Group organic growth



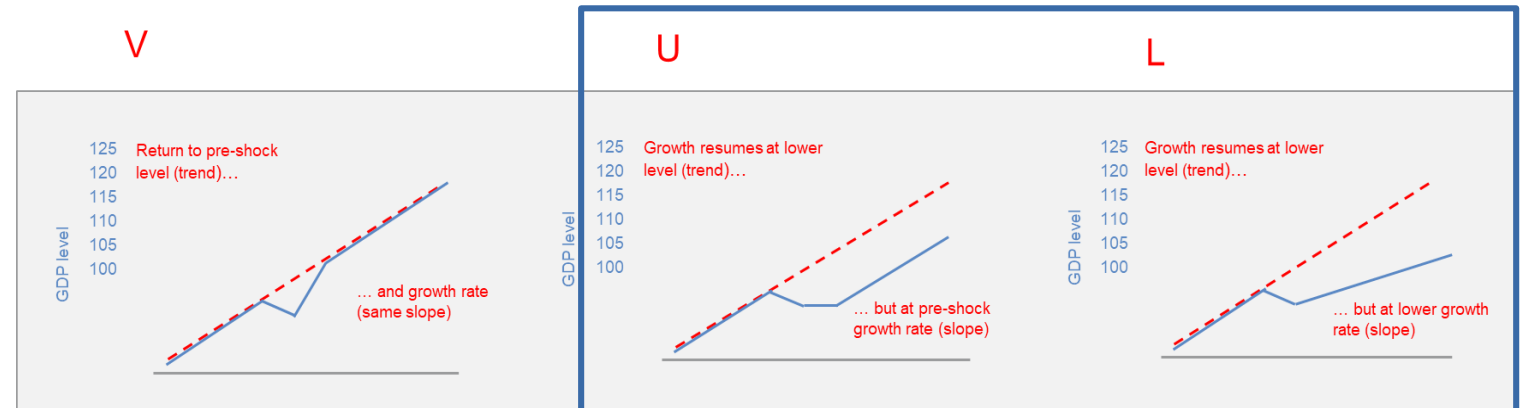
Recovery scenarios

GDP Q1 2020 (vs. prior quarter)

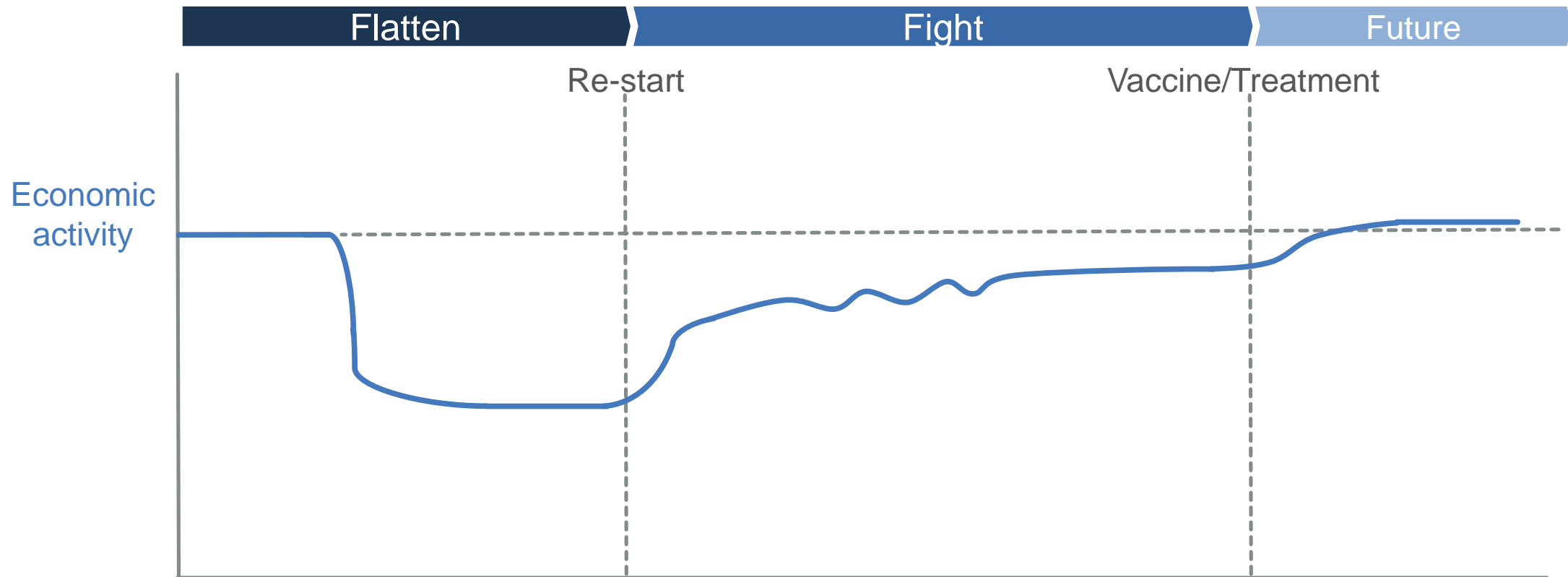
China: - 9.8%¹

EU: - 3.8 %²

USA: - 4.8 %³

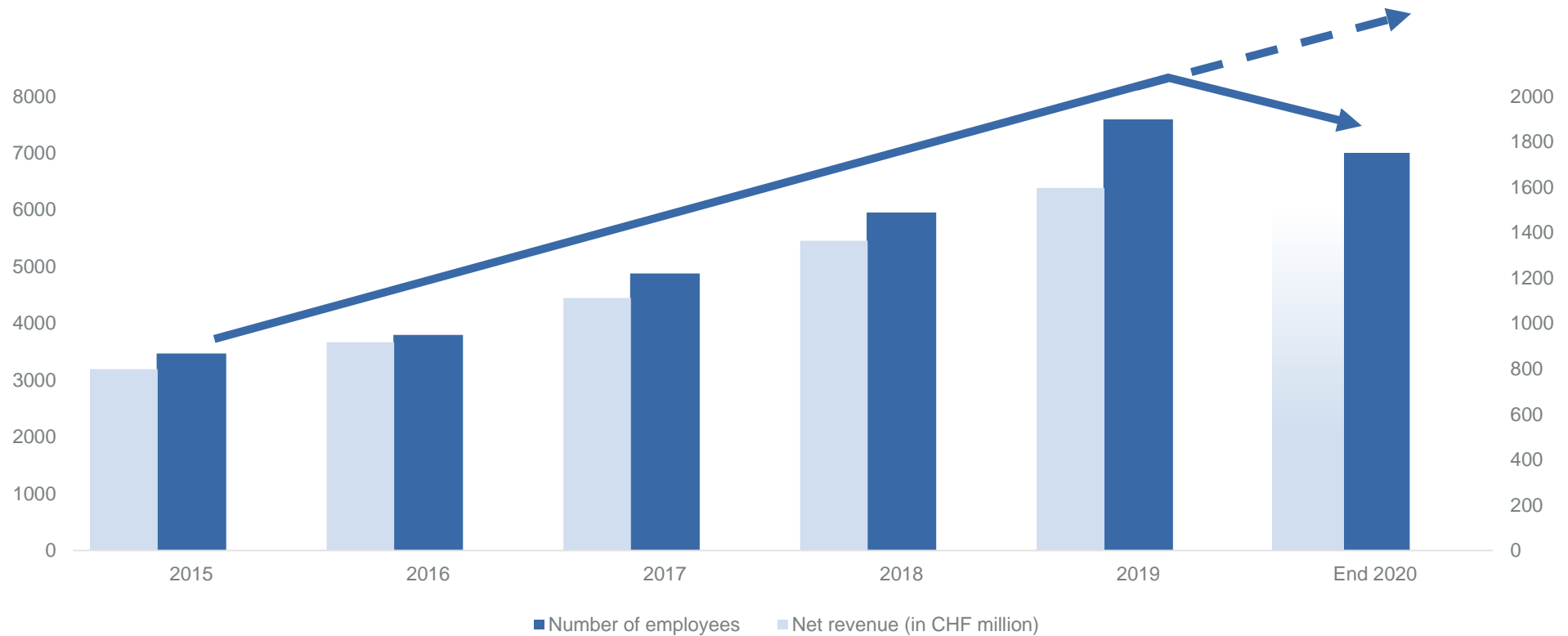


Three phases characterizing the Covid-19 journey



Organization has been geared for continuation of strong growth and must be aligned quickly to lower sales

- Workforce doubled over past 3 years to approx. 7680



Poised to bounce back strongly

- We are taking necessary action sooner rather than later; liquidity ensured; costs and production capacity adapted to future demand
- 2020: high double-digit million savings expected, incl. personnel reductions & restructuring costs of approx. CHF 15m; 2021: expected savings from personnel reductions of approx. CHF 30m
- Our implant portfolio is unparalleled and covers all price levels in key markets
- We have a strong rollout pipeline, including state-of-the art digital solutions, BLX, Virtuo Vivo, Smile in a Box, ClearCorrect etc; we have everything we need to become a leader in immediacy
- We have been using the lock-down to gain and train customers – highly successful online initiatives generate >200 000 visits and >20 000 customer leads
- Business fundamentals remain valid; resizing will protect our ability to innovate, manufacture, supply and sell winning solutions, and to bounce back quickly and strongly
- With a winning, agile culture and a resized team of 7000, we still are the driving force in our field

Questions & answers

Q&A



Thank you