# Today’s presenter

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<th>Speaker</th>
<th>Function</th>
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<tr>
<td>Strategy Update</td>
<td>Marco Gadola</td>
<td>Chief Executive Officer</td>
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<td>7 Megatopics in implantology</td>
<td>Frank Hemm</td>
<td>Head Marketing &amp; Education</td>
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<td>Excellence in immediacy</td>
<td>Eirik Aasland Salvesen</td>
<td>Specialist in Periodontology</td>
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<tr>
<td>DSO: leading in a disruptive world</td>
<td>Petra Rumpf</td>
<td>Head of DSO Business</td>
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<td>Taking our digital offering to the next level</td>
<td>Peter Zihla</td>
<td>Head Digital Business Unit</td>
</tr>
<tr>
<td>Questions &amp; answers session</td>
<td>All participants</td>
<td></td>
</tr>
</tbody>
</table>
Strong foundation to capture future opportunities

Marco Gadola, CEO
# Pushing boundaries since IDS 2017

## Business
- Revenue: CHF 918m to 1.4bn
- People: 3800 to 6000
- Implant market share: 23 to 25%

## Structure
- Straumann Group
- Premium & non-premium activities converged
- Dedicated Digital and DSO business units

## Reach
- Subsidiaries opened in:
  - Chile
  - India
  - Iran
  - Peru
  - RSA
  - Thailand
  - Turkey
- Neodent extended to 56 countries

## Scope
- Fully-tapered premium implants
- Total solution provider in esthetic dentistry
- Clear Aligner orthodontics
- 3D-printing
- Virtual clinic with AI
- Pilot in prevention of caries, periodontal disease, periimplantitis
## Key investments since IDS 2017

<table>
<thead>
<tr>
<th>Brand</th>
<th>Main field</th>
<th>Domicile</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anthogyr (30=&gt;100%)</td>
<td>Implants (upper value)</td>
<td>France</td>
</tr>
<tr>
<td>Zinedent</td>
<td>Implants (lower value)</td>
<td>Turkey</td>
</tr>
<tr>
<td>T-Plus (49=&gt;58%)</td>
<td>Implants (lower value)</td>
<td>Taiwan</td>
</tr>
<tr>
<td>Z-Systems (34%)</td>
<td>Ceramic implants</td>
<td>Switzerland</td>
</tr>
<tr>
<td>Medentika (51=&gt;91%)</td>
<td>MPS prosthetics, implants (value)</td>
<td>Germany</td>
</tr>
<tr>
<td>botiss (30%)</td>
<td>Biomaterials</td>
<td>Germany</td>
</tr>
<tr>
<td>ClearCorrect</td>
<td>Clear aligners</td>
<td>USA</td>
</tr>
<tr>
<td>Geniova (38%)</td>
<td>Hybrid aligners</td>
<td>Spain</td>
</tr>
<tr>
<td>Createch</td>
<td>High-end CADCAM</td>
<td>Switzerland</td>
</tr>
<tr>
<td>Valoc (44=&gt;55%)</td>
<td>Prosthetic fixation devices</td>
<td>Spain</td>
</tr>
<tr>
<td>Dental Monitoring (8%)</td>
<td>Digital monitoring with AI</td>
<td>France</td>
</tr>
<tr>
<td>Dental Wings</td>
<td>3D printing</td>
<td>Canada</td>
</tr>
<tr>
<td>Rapid Shape (35%)</td>
<td></td>
<td>Germany</td>
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</tbody>
</table>
Straumann Group – continuously increasing the addressable market

Implant provider → 2012
Total solution provider tooth replacement → 2016
Total solution provider esthetic dentistry → 2018

Addressable market in CHF billion
- 3.4 (2012)
- 7.0 (2016)
- 13.0 (2018)
Working on the 'next building block' – preventive dentistry solutions

Disease & esthetic driven scope expansion

Prevention of oral disease & tooth loss

- Natural tooth
- Healthy pre-disease
- Mild - moderate disease
- Severe disease

Tooth loss

Piloting

Implant tooth

Tooth replacement

- Healthy pre-disease
- Mild - moderate disease
- Severe disease

Implants & prosthetics

Digital solutions

Biomaterials

Prevention of implant loss

Healthy pre-disease

Mild - moderate disease

Severe disease

- Implant tooth
- Tooth loss

Piloting

2bn of additional addressable market
We can count on a compelling portfolio of high end brands and solutions

**Tooth replacement**
- Planning
- Surgery
- Prosthetics

**Orthodontics**
- Planning
- Aligner treatment

**Periodontitis & Peri-implantitis**
- Diagnosis
- Non-surgical treatment
- Surgical treatment

**Caries**
- Diagnosis
- Non-invasive treatment
- Crowns & bridges

**Data acquisition and Treatment monitoring**
- dental wings
- 3shape
- MEDIT

**Emdogain® flapless**
Half of the implant market is ‘value’

<table>
<thead>
<tr>
<th>Region</th>
<th>Premium</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>LATAM</td>
<td></td>
<td></td>
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<tr>
<td>APAC</td>
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<td></td>
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<tr>
<td>NAM</td>
<td></td>
<td></td>
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<tr>
<td>EMEA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Global</td>
<td></td>
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</tbody>
</table>

2008: Premium >70%
Comprehensive portfolio of value implant brands

Global implant & abutment market

Upper value

Lower value

~CHF 4bn

Premium

Value

Upper value

Lower value

Straumann Group share (2018)
Anthogyr – another jewel in our crown

- Stake in French implant manufacturer increased from 30% to full ownership
- Established leading provider of upper value implants
- Comprehensive implant portfolio
- Straumann Group to build on success with Anthogyr in China and Russia

For all indications, all users
Medentika – more attractive, cost-effective alternatives

Straumann increases ownership from 51 to 91%

Multi-platform solutions
- Now include selected value brands
- New compatibles for Osstem, HiOssen and T-Plus

Quattrocone implant
- 3.8mm diameter now available
- Smaller than the original!
Bringing Neodent’s innovative Grand Morse to the world

- Neodent now available in 56 countries
- Complete new system designed to meet all clinical needs
- Fully-tapered design, comprehensive and easy-to-use prosthetics
- GM global roll out in full swing
- Very little cannibalization of Straumann premium range

1 Data on file
## Long avenue of growth

<table>
<thead>
<tr>
<th>Market segments</th>
<th>Est. segment size(^1) (2018 in CHF bn)</th>
<th>Growth rate</th>
<th>Our current market share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Biomaterials</td>
<td>0.6</td>
<td>High-single digits</td>
<td></td>
</tr>
<tr>
<td>Implantology(^1)</td>
<td>4.3</td>
<td>Mid-single digits</td>
<td></td>
</tr>
<tr>
<td>CAD/CAM equipment(^2)</td>
<td>1.5</td>
<td>Double digits</td>
<td></td>
</tr>
<tr>
<td>CAD/CAM prosthetics</td>
<td>3.9</td>
<td>Double digits</td>
<td></td>
</tr>
<tr>
<td>Clear aligners</td>
<td>2.0</td>
<td>&gt;25%</td>
<td></td>
</tr>
</tbody>
</table>

\(^1\) Imaging and planning segment is not included in the overview above. Customized prosthetics are listed under CAD/CAM prosthetics, but also belong to the total implant and abutment market.
Straumann Group at IDS 2019 – United for excellence in dentistry

- More than 100 new items
- Major launches, including BLX
- 500m² Arena of Confidence
- Separate stands for Neodent, Medentika, Anthogyr, Dental Wings, ClearCorrect, Createch
- DenToGo - virtual clinic truck
- Partner stands: ITI, botiss, Rapid Shape, 3Shape, Zirkonzahn, Dental Monitoring et al.
7 megatopics in implantology

Frank Hemm
Head Marketing & Education
Seven strategic Innovation Megatopics

- Efficient treatment protocols
- Reducing Invasiveness
- Esthetics
- Enablement & Education
- Compromised Patients
- Edentulism
- Implant Health
Evolving from parallel-walled to tapered implants

1986
Tissue Level
The legend

2007
Bone Level
Confidence at Bone Level

2015
Bone Level Tapered
The new tapered standard

2017
Small One
2.9mm BLT

We have learned much

• New customer groups
• New indications esp. immediacy
• Longer implants
• Smaller implants
• Bone profilers
• Additional prosthetic components (SRA)
• Wider implants, molar extraction sockets
• Even more primary stability
We asked clinicians & experts worldwide what is important to them.

- efficiency
- flexibility
- confidence
Straumann® BLX - co-developed with a pioneer in immediate treatment protocols

NobelActive®

* NobelActive is a trademark of Nobel Biocare

Dr Ophir Fromovich
Unique Cut-Collect-Condense properties allow for controlled bone management in all surgical situations

- **Roxolid® SLActive®**
- **Full length dynamic chip flute**
- **Bi-directional cutting elements**
- **Reduced neck diameter**
- **Variable thread design**
- **Slim & fully tapered implant core**
- **Deep apical threads**
Straumann® BLX implant portfolio

• Full range of implant diameters and lengths
• One connection – one prosthetic line
• Ø 3.75 for all indications
TorcFit™ Hybrid Connection

Precise outer shoulder
- Bridges
- Wide emergence profiles

Reduced cone angle 7°
- Tight conical connection
- Slim
- High strength

Hexalobe shape
- 6 positions
- High torque resistance
- Cylindrical support for high strength

Short
- Short implants (6 mm)
Drill design enhanced to reduce heat

BLX VeloDrill™

- **Simply Cool**
  Combines low heat generation with high drilling stability.

- **Free on hand**
  Compatible with self-locking drill handles for guided surgery.

- **Stay in control**
  Compatible with single use drill stop that provides precise depth control.

- **Shorter Chair time**
  Pilot-to-final guided surgery protocol at 800 rpm.
### Real-world evidence – online case tracker shows very high clinical satisfaction

<table>
<thead>
<tr>
<th>Category</th>
<th>%</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Healed sites</td>
<td>72%</td>
<td>4.8</td>
</tr>
<tr>
<td>Extraction sites</td>
<td>28%</td>
<td>4.7</td>
</tr>
<tr>
<td>Anterior</td>
<td>29%</td>
<td>4.6</td>
</tr>
<tr>
<td>Posterior</td>
<td>71%</td>
<td>4.7</td>
</tr>
<tr>
<td>Single</td>
<td>31%</td>
<td>4.7</td>
</tr>
<tr>
<td>Multi / Edentulous</td>
<td>69%</td>
<td>4.8</td>
</tr>
<tr>
<td>Delayed loading</td>
<td>73%</td>
<td>4.6</td>
</tr>
<tr>
<td>Immediate loading</td>
<td>27%</td>
<td>4.9</td>
</tr>
</tbody>
</table>

>200 cases with 4.7 satisfaction.
Key benefits of the Straumann® BLX implant system

**BEYOND IMMEDIACY**
- Perfected for immediacy excellent for all indications
- Business opportunities: Use chair-time more efficiently and attract more patients

**DYNAMIC BONE MANAGEMENT™**
- “Cut, Collect, Condense”-unprecedented high bone-to-implant contact
- Optimal primary stability in all bone types

**ESTHETIC EASE CONCEPT**
- One connection
- Slim and under-contoured prosthetics
- Easy soft tissue conditioning

**REAL CONFIDENCE**
- All benefits from the trusted premium Swiss brand
- Roxolid® enabling Ø 3.75 mm implant for all indications
1 out of 4 implants have a fully tapered design

Market volume
(Implant fixtures)

- Fully tapered
- Parallel walled
- Apically tapered

25 million units

Main players:
- Nobel Biocare
- BioHorizons
- MIS, Implant Direct, Megagen
- Neodent, Anthogyr and Equinox

Current Straumann Group market share
New premium market segment
- Fully tapered: 2nd largest
- Opportunity for incremental sales

Clear Target: Nobel Active
- Comparative advantages
- BLX developed with insider knowledge

Most advanced system
- More advanced than any other premium system
- Perfected for immediacy, excellent for all indications

The opportunity of a decade
Guest speaker: Eirik Aasland Salvesen

- Specialist in Periodontology
- Partner at TSMG Madlagården in Stavanger where he serves as the Director of the TSMG Academy
- ITI member and a member of the Nobel Biocare Mentorship program and Clinical Consultant for the Nordic countries
- International lecturer in periodontology and implant dentistry
- First surgeon to place BLX in a human
General considerations

“Existing evidence suggests that implant survival is not affected by implant placement or loading protocols provided that careful patient assessment and planning has been undertaken”  
Morton et al (2016)

“Immediate implant placement and immediate loading in the esthetic area are great opportunities in modern dentistry”  
Kan et al (2018)
Why BLX?

- It’s STRAUMANN!
- Predictable primary stability
- Excellent implant strength – Roxolid®
- SLActive® – Established surface technology for predictable osseointegration
- Primary & secondary objectives predictably achieved
- Prosthetics refined – TorcFit™ connection
- For all indications!
"Refinements are small changes or additions that you make to something in order to improve it"
Primary goals
Successful treatment outcome, high predictability, good long-term stability and low complication rate

Secondary goals
Fewest possible number of surgical interventions, low pain and morbidity during healing, short healing periods and short overall treatment time
My BLX Volume

Distribution of implant diameter

Distribution of implant lengths

Distribution of implant position

Distribution of placement protocol

Distribution of prosthetic plan
1 year follow up first 10 BLX cases

Day 0

Day 365
The Future of BLX

Target Indications BLX
All indications

Target Group BLX
All clinicians

Single, partial and complete edentulous cases
Immediate protocols
Traditional protocols
Easily implemented for Straumann customers
Clinicians working with immediacy protocols
Start-up system
Target Group BLX
Thank you

My personal honorary recognition goes to:
All colleagues at Oris Dental
Ane-Mari Igland Naustdal
Monica Palmer-Tvedt
Dr. Tore Berset
NGOD
UBI
Straumann

eirik@orisdental.no
+4790942298
**Straumann® Edentulous Solutions**

Designed to provide best patient outcomes taking into consideration

- Patient expectations
- Clinical situation
- Financial resources

<table>
<thead>
<tr>
<th>Removable</th>
<th>Pro Arch</th>
<th>Pro Arch Advanced</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1" alt="Removable" /></td>
<td><img src="image2" alt="Pro Arch" /></td>
<td><img src="image3" alt="Pro Arch Advanced" /></td>
</tr>
</tbody>
</table>

2019 2019 2020
Pro Arch Removable – Mini Implant

- **Roxolid®**: 35% increased fatigue strength
- **SLA®**: Long-term scientific evidence
- **Optiloc®**: Space-saving design
  Combination of ADLC\(^1\) coating and PEEK for lower retention loss

\(^1\)Amorphous Diamond-Like Carbon

- **Affordability**
- **Patient comfort**
- **Guarantee**
Pro Arch Fixed – broad prosthetic options

**Standard solutions**
Screw retained wrap-around bars with acrylic prosthesis (Ti/CoCr)

**Esthetic solutions**
Screw-retained bridges (Ti/CoCr/ZrO₂/PEEK) or abutment hybrid

Straumann® SRBB Portfolio addresses patient expectations and affordability
Partnership with Z-Systems creates a leading force in ceramic implants

- 34% stake in pioneering leader in ceramic implant systems
- Loans + capital injection to support Z-Systems’ pipeline and expansion.
- Exclusive distribution rights for first metal- and plastic-free screw-retained two-piece ceramic implant: to launch as Straumann SNOW
- Combination of expertise, portfolio, brand, marketing strength, and reach creates a leading force in ceramic implants.
Straumann zygomatic implant system in development

Zygomatic implants
• Rehabilitation of patients with severe maxillary atrophy
• Approx. 15,000 placed annually
• Main suppliers: Nobel Biocare, Southern Implants, Neodent

Straumann system
• Clinical tests start with international KOLs in H2 2019
• System includes new designs, prosthetics and instruments
• Development & education with KOLs

Illustration by courtesy of Dr S. Zarrine
DSO: Leading in a disruptive

Petra Rumpf
Head of DSO business
Over 1000 dental chains globally

- Strong presence in the US and Europe; >90 in Spain alone
- Some large DSOs have revenues of >1bn
- Growing 3x faster than the market
- Increasingly international
- Private equity companies accelerate consolidation
DSO’s are the fastest growing segment in dentistry, growing 3x market and driving implant penetration.

DSO share in implants placed in %

- Finland: 50%
- Spain: 47%
- Denmark: 28%
- China: 24%
- Sweden: 22%
- AUNZ: 20%
- Netherlands: 17%
- Norway: 15%
- Italy: 13%
- UK: 11%
- US: 11%
- CH: 10%
- Germany: 2%

> 3’000’000 Implants E2020

DSOs driving implant penetration rates

<table>
<thead>
<tr>
<th>Country</th>
<th>% Share of DSO in implants placed</th>
<th># of Implants placed per 10’000 population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spain</td>
<td>47%</td>
<td>320</td>
</tr>
<tr>
<td>USA</td>
<td>11%</td>
<td>84</td>
</tr>
</tbody>
</table>

- Increased patient outreach
- Higher treatment conversion
- Higher doctor productivity

Source: Straumann Proprietary Data, market shares and numbers in DSO relevant countries
* Implant volumes in relevant group of countries
Key Trends affecting the Dental Care Delivery model

... and supporting the growth of DSO's

1. Massive capital inflow by Private Equity driving **Consolidation**

2. **Digitalization** increasing treatment choices, efficiencies and standardization

3. **Demographic shifts** – female dentistry, GPs expanding into implants & ortho,..

4. Increasing **Consumerism** and shifting demand patterns
Digital Workflows help DSOs grow and reduce costs at the same time

<table>
<thead>
<tr>
<th>Higher Patient Satisfaction</th>
<th>Cost reduction</th>
<th>Revenue Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Less visits</td>
<td>• Reduced chair-time</td>
<td>• New treatment options (Implants, Clear Aligners)</td>
</tr>
<tr>
<td>• Higher comfort</td>
<td>• Less re-do’s, breakages</td>
<td>• Higher case acceptance</td>
</tr>
<tr>
<td>• Improved patient interaction</td>
<td>• New &amp; more efficient routes to prosthetics (chairside, in-lab, central)</td>
<td>• Upselling</td>
</tr>
<tr>
<td>• Greater loyalty (monitoring)</td>
<td>• Ability to standardize processes (clinical, lab,..)</td>
<td>• More patients in same time</td>
</tr>
<tr>
<td>• Higher treatment conversion rates</td>
<td></td>
<td>• Attract young dentists</td>
</tr>
</tbody>
</table>
Demographic shifts

Changing gender and age demographics fuel the growth of DSO’s (Example US)

Females in Dentistry

- 20% Female in dentistry
- 50% Female graduates

Age demographics

Dentists affiliated with DSO’s by age group (US)

- 21-34: 17.4%
- 35-49: 11.0%
- 50-64: 4.2%
- 65+: 3.2%

Gender demographics

Dentists affiliated/employed by DSO’s by gender (US)

- Female: 11%
- Male: 7%

Benefits of DSO’s

- Career flexibility & development opportunities
- Training & continued learning
- Ability to focus on patient care
- Access to latest technologies
- Access to state-of-the-art marketing and practice management services
- Less business risk
DSO’s are better in capturing the benefits of consumerism and offer an enhanced patient experience

- Less invasive and shorter treatment times
- High esthetics and quality of life
- Modern treatment concepts (smile design,..)

- Attractive opening hours
- Simple online scheduling
- Easy access to regional, national or international clinic network

- Affordability
- Financing options
- Warranties
The Straumann Group is well positioned…

<table>
<thead>
<tr>
<th>Solution/customer matrix</th>
<th>Surgeon</th>
<th>Perio</th>
<th>Ortho</th>
<th>GP</th>
<th>Lab</th>
<th>DSO</th>
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<tbody>
<tr>
<td>Implant surgical</td>
<td>X</td>
<td>X</td>
<td>(X)</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Implant prosthetics</td>
<td></td>
<td>X</td>
<td>X</td>
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<tr>
<td>Digital workflow</td>
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<td>X</td>
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<tr>
<td>Ortho</td>
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<tr>
<td>Toothborne / C&amp;B</td>
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<td>Periodontitis</td>
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<tr>
<td>Peri-implantitis</td>
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</tr>
<tr>
<td>Caries</td>
<td></td>
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<td>X</td>
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<tr>
<td>Tooth whitening</td>
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<td>X</td>
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</tbody>
</table>
(...to take the lead in all needs segments)

**Low Pricing**
- Aiming to for high quality, low cost options
- Choose us for our 2nd and 3rd tier portfolio, scalability, supply chain, reputation

**Growth oriented**
- Aiming to grow within a given specialty
- Choose us for our portfolio of services, training & education, field support, dental expertise

**Transformational**
- Aiming to go digital, start new specialities, expand into new treatment concepts
- Chose us for our digital portfolio, field support, T&E, experience, holistic portfolio

**Importance of Value Creation**
- Low
- High
Three avenues to accelerate our growth

<table>
<thead>
<tr>
<th>Increase our product exposure with DSO’s</th>
<th>Enhance our business services to DSO’s</th>
<th>Take over part of their value chain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Implant dentistry</td>
<td>Esthetic dentistry</td>
<td>Outsourcing partner</td>
</tr>
<tr>
<td>Tooth replacement</td>
<td>Training &amp; Education</td>
<td>Treatment planning</td>
</tr>
<tr>
<td></td>
<td>Business Services</td>
<td>CAD-CAM milling</td>
</tr>
<tr>
<td></td>
<td>Field Services</td>
<td>…</td>
</tr>
</tbody>
</table>

**Growth Drivers**
- Ortho
- Digital
- CAD-CAM prosthetics
- Next generation preventive

**Growth Drivers**
- New treatment concepts
- Artificial Intelligence (winning the patient of the future,…)
- Networking

**Growth Drivers**
- Smile-in-the-box (immediacy concepts)
- Unique
- Edentulous
Summary

- DSOs are the fastest growing segment and are well positioned to take the lead in innovating dental care delivery
- DSOs are still underrepresented in specialties and not digitally equipped
- Significant benefits offered by DSO’s to key stakeholders will continue to fuel this growth
- Straumann Group best suited to take a leadership role
  - We offer entire treatment concepts not products
  - Most comprehensive Training & Education offering
  - Global supply chain across all brands
  - Leading service and support
Taking our digital offering to the next level

Peter Zihla
Head of Business Unit Digital
Full service & solution portfolio including key partners

<table>
<thead>
<tr>
<th>Treatment Planning</th>
<th>Implant surgery &amp; Orthodontic treatment</th>
<th>Prosthetic design, Production &amp; Placement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Acquisition</td>
<td>Orthodontic</td>
<td>Scan &amp; Shape</td>
</tr>
<tr>
<td>Planning Services</td>
<td>Implants &amp; Prosthetics</td>
<td>MPS Prosthetics</td>
</tr>
<tr>
<td></td>
<td>Biologics</td>
<td>Central, in-lab &amp; chairside production</td>
</tr>
</tbody>
</table>

- **Data Acquisition**
  - dental wings
  - 3shape
  - CARES® Visual
  - MEDIT
  - coDiagnostiX®

- **Planning Services**
  - VR
  - createch
  - clearcorrect

- **Orthodontic**
  - smyletec
  - straumann
  - anthogyr
  - equinox
  - T-PLUS

- **Implants & Prosthetics**
  - neoDENT
  - MEDENTIKA®
  - LifeNet Health.
  - zinedent
  - GENOS
  - Z-SYSTEMS

- **Biologics**
  - botiss biomaterials
  - etkon

- **Scan & Shape**
  - zaledent
  - VALOC

- **MPS Prosthetics**
  - MEDENTIKA®

- **Central, in-lab & chairside production**
  - AMANN GIRRBACH
  - rapidshape
  - DENTAL
Straumann’s new scanner offering…

**Virtuo Vivo™**: new intra-oral scanner

**Virtuo Harmony™**: new in-lab scanner

**Coming soon**
…complemented by leading-edge technology from 3Shape

3Shape TRIOS 4

- Built-in fluorescent technology to identify surface caries
- Detect likely interproximal caries via infrared scan - with zero radiation
…and Medit

- Medit endorses DWOS as preferred CAD software
- Cooperation between Straumann Group and Medit promotes digital workflow integration of DWOS
- Straumann gains distribution rights for Medit high-performance lab scanners, fully integrated in CARES workflow
- Scanners will be Straumann branded and sold in addition to Dental Wings range
- Underpins DWOS and offers an additional tailored price-performance option for Straumann CARES customers
Large potential for growth in digital equipment

Source: Straumann proprietary GP survey in US, DE, IT, and UK; samples size >200 dentists.
DWOS – success born at IDS 2011

- One of the most flexible and powerful CAD/CAM software suites available
- Fully open platform boosts productivity and efficiency for clinics and labs
- New DWOS 8 and CoDiagnostiX updates with ‘Easy Mode’ for simplified workflows and automated proposals
- Recent collaborations:
  - Carestream CS 3600 intraoral scanner validated/integrated; streamlined data import
  - VHF Camfacture Z4 milling machines fully integrated in DWOS
  - Medit endorses DWOS as preferred CAD software
Leading specialist in high-precision CADCAM prosthetics with Createch

- Stake increased in 2018 from 30% to full ownership
- Expertise in high-tech milling; offers solutions beyond the scope of most CADCAM providers
- Leader in multiplatform solutions and screw-retained bars/bridges (SRBBs), offering >300 implant connections
- Straumann Group’s global development center for screw-retained bars/bridges
New printing, washing & curing machines with convenient capsules/cartridges – tailored packages, easy, no-mess!

DLP 3D printer > Cleaning > Curing & finishing

New capsule system

Complements existing printer range

Resins cover the following indications:

- Master model
- Aligner model
- Gingiva mask
- Cast
- Indirect bonding tray
- Surgical guide
- Bite splint
- Denture base
- Crown & bridge (temporary/semi permanent)
Clear aligners – one of the most attractive areas in dentistry
Taking ClearCorrect to the world and launching SmyleTech in China
Straumann adds artificial intelligence (AI) technology across its portfolio
The Straumann Virtual Clinic
a taste of the future today

VITALS CHECK
\- Assessment scan plus AI
\- Fast, efficient, convenient
\- Basis for future comparison

MY SMILE
\- Instant photo simulation of patient’s smile during and after treatment

MONITORING
\- Monitoring clear aligner progress remotely by smartphone
\- Instant feedback
\- Patients can track progress

SMILE GUARD
\- Regular follow-up service after treatment to ensure stability and prevent relapse
Thank you

Investor.relations@Straumann.com