

# The Future and Innovation from Warsaw (US) and Winterthur (CH)



**ZIMMER BIOMET**  
Moving You Forward.™

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Bratislava, Sep 11, 2024



# Our Global Presence



Global Sales 2019

**7.4 bn**



Team Members Globally

**18,000**



Countries we serve globally

**> 100**



Medtech Company of the Year\*

**2019**



Research & Development  
Employees globally

**2,100**



Research & Development Investment  
(% of net sales)

**5,6%**



# HISTORY OF TRADITION AND INNOVATION

1927

J.O. Zimmer establishes Zimmer Manufacturing Co. in Warsaw, Indiana (USA)

1972

Bristol-Myers acquires Zimmer

2001

Spin-off Bristol-Myers and Zimmer

2003

Zimmer acquires Centerpulse

2008 - 2012

Zimmer acquires Abbott Spine, Beijing Montagne, SoPlus, ExtraOrtho, Synvasive Technology, and Normed

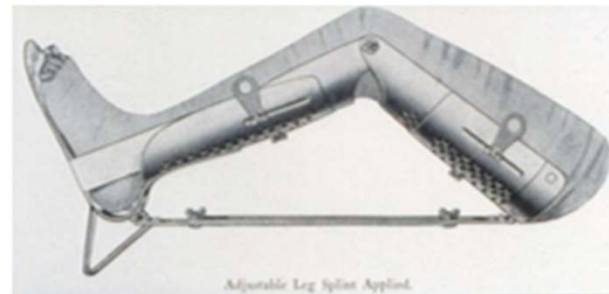
2015

Zimmer and Biomet combination

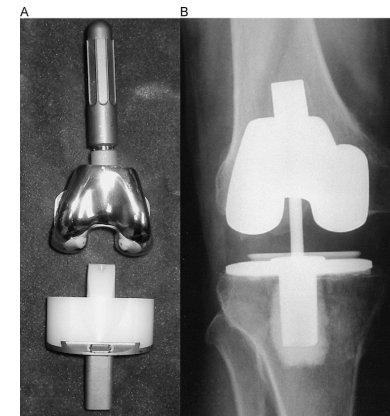
2016

Zimmer Biomet acquires Cayenne Medical, Clinical Graphics, Medtech SA, CD Diagnostics, Respond Well, LDR

...



J.O. Zimmer



# BROAD PORTFOLIO OF MUSCULOSKELETAL SOLUTIONS

**Craniomaxillofacial**

**Shoulder, Elbow and Wrist Arthroplasty**

**Thoracic**

**Smart Implants**

**Partial, Primary, Revision and Salvage Knee Arthroplasty**

**Preservation, Primary, Revision and Salvage Hip Arthroplasty**

**Upper and Lower Extremity Trauma**

**Foot and Ankle Fixation and Arthroplasty**

**Sports Medicine**

**Allograft service**

**Bone Healing**

**Early Intervention & Biologics**

**Surgical Products**

**Oncology & Specialized Implant Solutions**

**Bone Cements & Accessories**

**Mixed Reality**

**Robotics & Intelligent Instruments**

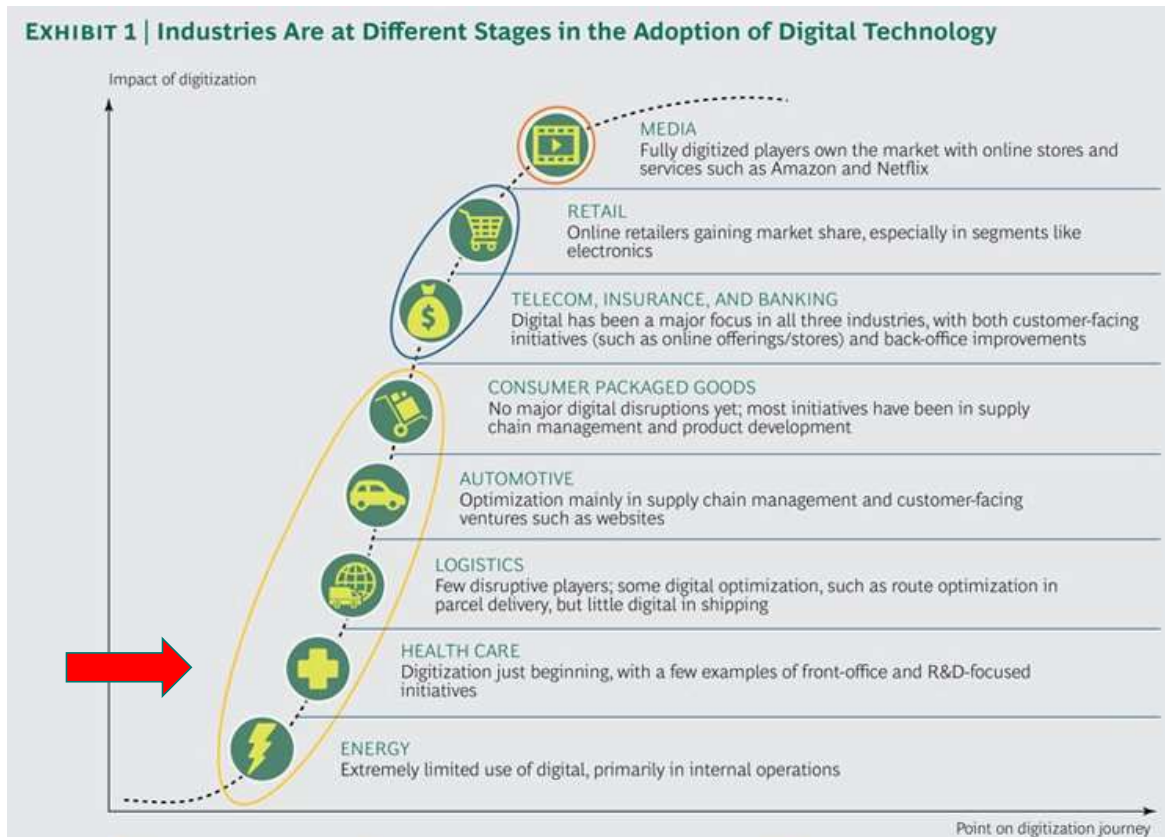
**Care Management & Patient Engagement**

**Predictive Analytics & Data Insights**





# Where is Health Care in the Digital Technology Adoption Curve? – how are we executing?



Several major disruptions occurred

Disruption moves and started to affected industries

Effect of digitalization still unknown, disruptive changes remain to be seen

Source: BCG analysis



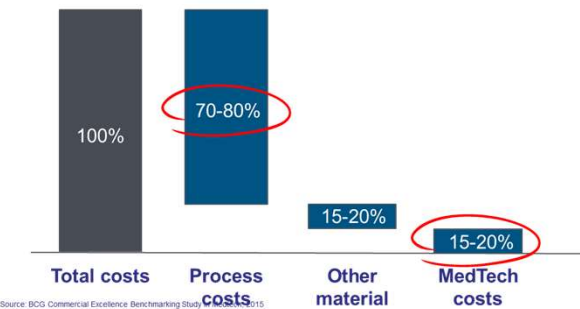
# Have we solved the problem?



## Raising Health Care costs

Process efficiency is biggest lever for improvements in hospitals. However, most initiatives focus on DEVICE expenses

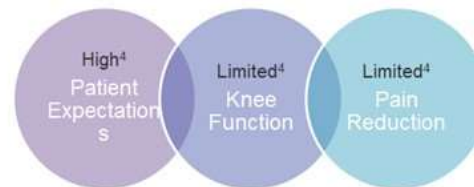
### Typical hospital cost structure



Source: BCG Commercial Excellence Study 2015

## Unsatisfactory Results

Up to 20% Knee Patients are dissatisfied<sup>1,2,3</sup>



## Treatment Variability

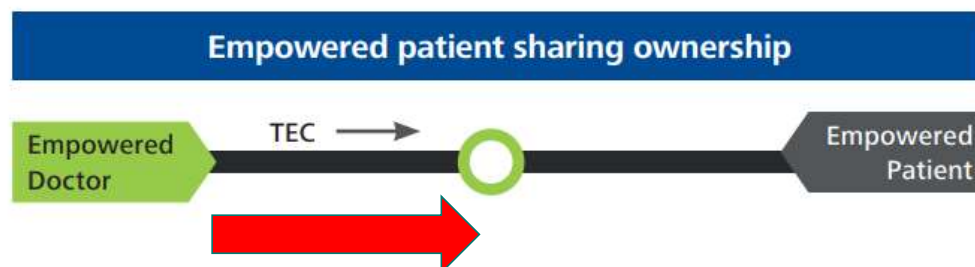
-  **Patient outcomes vary greatly** from a hospital to another, across treatment areas and geographies
-  **Number of medical errors and adverse events:** medical errors to be estimated to be #3 cause of death in the US, 8-12% of patients admitted to hospital in Europe suffer from adverse events.
-  **Growing nurse shortage and turnover:** up to 26% average increase in nurse vacancies across Europe
-  **Varied surgeon experience:** +30 minutes surgical time for less experience surgeons

Source: International Consortium for Health Outcomes Measurements (ICHOM). Peter Lee and Neil Greenhalgh. The number of hospital procedures in an American state is free online. *Journal of the American College of Surgeons*. 2008; 112(2): 205. The unmet need of value-based medicine 2: finding ways to the end goals of care in the US. *BMJ*. 2014; 349: g6666. Patient safety and quality of care. *Social Epidemiology*. 4(1): 2014-3 (Dublin, J.A. 2006). The great nursing shortage. *Accident Analysis and Safety Health*. 1(2): 2004-1 (2004). Nurse turnover: literature review and update. L.J. Hays, R. Chinn, S. D. C. 2014. Patient, Hospital, and Procedure Characteristics Influencing Total Hip and Knee Arthroplasty Procedure Duration. Kim et al. *The Journal of Arthroplasty*. 2017; 32(12): 3854-60. 2017.07.021. Epub 2017.07.021.

1. Greenhalgh N, McPherson NM, Bourne RB, Davis AM. Willingness to go through surgery again validated the WOMAC clinically important difference from THR/TKR surgery. *J Clin Epidemiol*. 2008;61(9):907-18. Epub 8 Feb 14.  
2. Greenhalgh N, McPherson N, Ryd L, Lidgren L. Appropriate questionnaires for knee arthroplasty. Results of a survey of 3600 patients from The Swedish Knee Arthroplasty Registry. *J Bone Joint Surg Br*. 2001;83(3):339-44.  
3. Greenhalgh N, Greenhalgh MA, Cook KF, Mathis KB. The John Insall Award: Patient expectations affect satisfaction with total knee arthroplasty. *Clin Orthop Relat Res*. 2006;452:35-43.(doi):10.1097/01.blo.0000238825.63648.1e. Epub 2006.07.01.  
4. Greenhalgh N, Pratt CM, Banda J, Fick DP, Khan RJK, Robertson BW. Patient Dissatisfaction Following Total Knee Arthroplasty: A Systematic Review of the Literature. *J Arthroplasty*. 2017;32(12):3854-60. 2017.07.021. Epub 2017.07.021.



# The shift in paradigm: greater ownership and patient engagement



- Patient completely reliant on HCP
- Difficult for patients to navigate between health and social care
- Interventions in response to physical evidence from patient

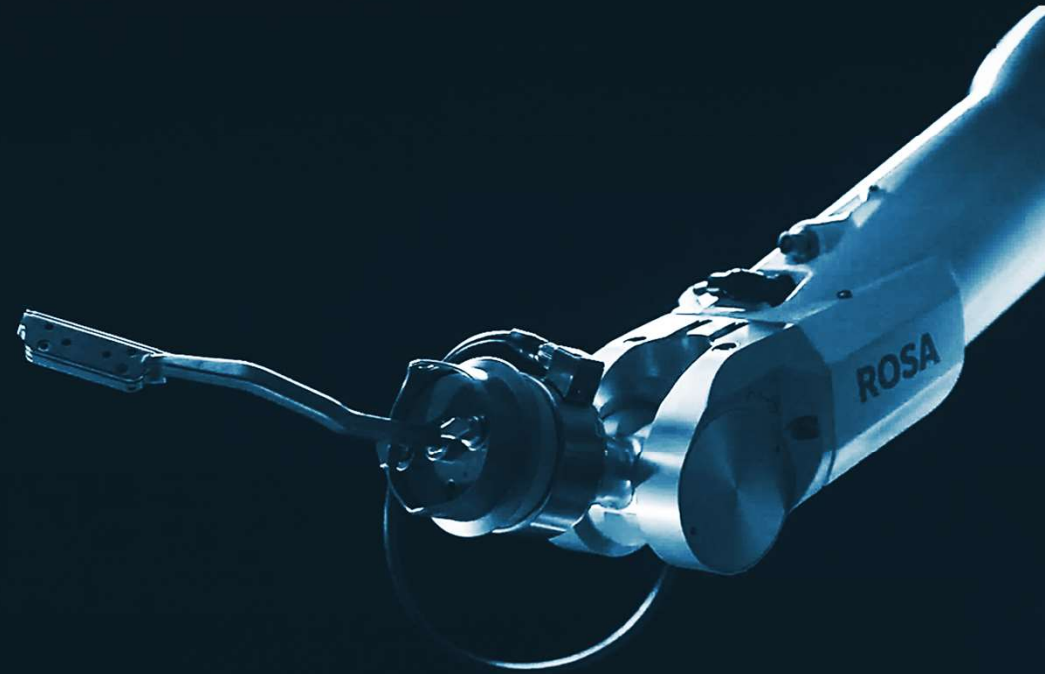
- Patient informed
- Co-creation of care packages, proactive prevention and rapid access
- Technology enabled supported self management / discharge

Source: Deloitte Research, 2015

# Personalised Total Knee Solution Powered by

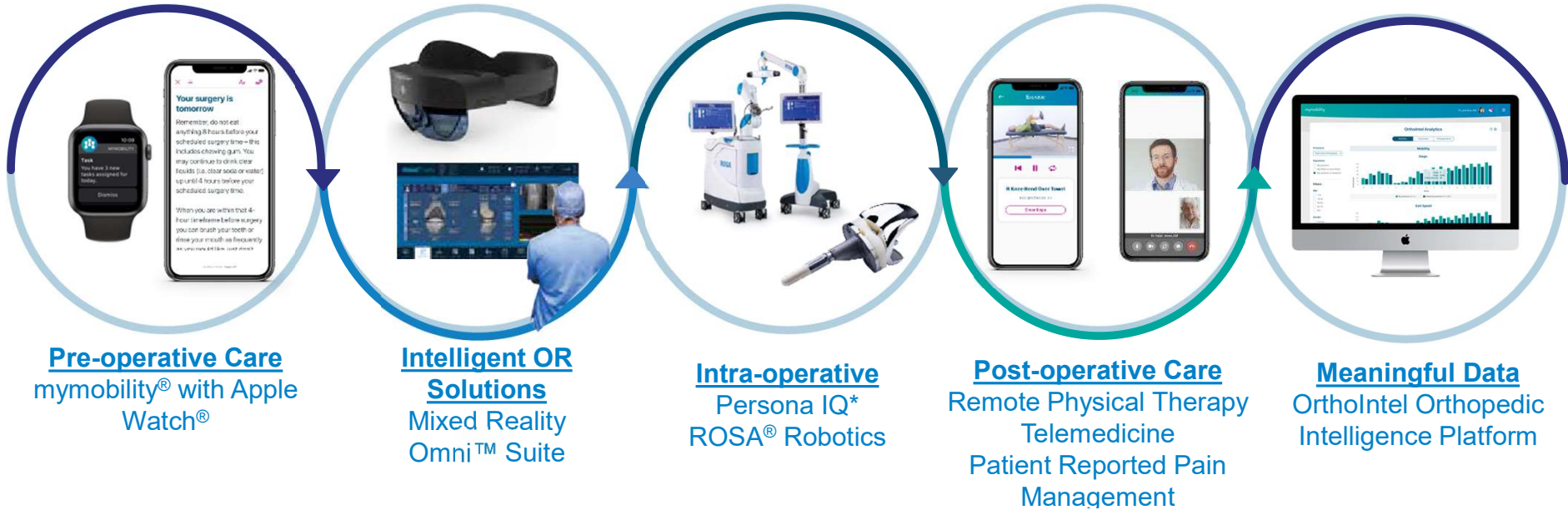
ZBEdge™

At Zimmer Biomet we believe that purposeful technology can enhance surgical performance and meet rising patient's expectations, by aiming to restore each patient's unique knee kinematics and personalising each knee replacement.





# Transforming the Continuum of Care in Orthopedics



**A Platform that Guides Patients Through a Customized and Connected Pre- and Postoperative Patient Experience**





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