Insights
2017/2018
The ZEISS Group
The Power of ZEISS
170 years of company history in Innovations

1st Picture of the surface of the Moon taken with lenses from ZEISS

Every second two people decide to purchase eyeglass lenses from ZEISS

15 million cataract operations are performed annually around the world using surgical systems from ZEISS

9,100 Stars can be projected in planetariums using ZEISS optics

3 Technical Oscars for helping leading movie-makers capture perfect moments on film

35 Nobel prize-winners put their trust in ZEISS microscopes to see more
ZEISS
The company founders

Their mission

- Cutting-edge research
- Extreme precision and maximum quality
- Responsibility to society
Company history

- **Carl Zeiss** opens a workshop for precision engineering and optics in Jena (1846)
- **Carl Zeiss Foundation** created by Ernst Abbe (1889)
- **First non-German subsidiary** in London marks the start of global expansion since 1890
- **Diversification** Innovative products open up new business since 1894
- **Partition** Jena: expropriated, Oberkochen: new factory since 1926
- **Stock corporation** ZEISS is transformed into a stock corporation – the Carl Zeiss Foundation remains the sole stockholder after 1945
- **Consolidation** Starts with the founding of Zeiss Ikon AG 1991
- **Reunification** of the two separated companies 2004
- **200th birthday of Carl Zeiss** (1816–1888) 2016
- **Ernst Abbe** becomes part owner 1916
Innovation is part of the ZEISS DNA
For more than 170 years
Over 30 Nobel laureates worldwide use ZEISS instruments to achieve progress in science

Robert Koch
Physiology/medicine

Alvar Gulstrand
Physiology/medicine

Manfred Eigen
Chemistry

Christiane Nüsslein-Volhard
Physiology/medicine

Craig C. Mello
Physiology/medicine

Eric A. Cornell
Physics

Andre Geim
Konstantin Novoselov
Physics

Sir Paul M. Nurse
Leland H. Hartwell
Timothy Hunt
Physiology/medicine

Eric Betzig
Stefan W. Hell
William E. Moerner
Chemistry

Leland H. Hartwell
Sir Paul M. Nurse
Timothy Hunt
Physiology/medicine

Andrew Z. Fire
Physiology/medicine

Shinya Yamanaka
Sir John B. Gurdon
Physiology/medicine

Eric A. Cornell
Chemistry

Santiago Ramón y Cajal
Camillo Golgi
Physiology/medicine

Frits Zernike
Physics

Bert Sakmann
Erwin Neher
Physiology or medicine

Sidney Brenner
H. Robert Horvitz
John E. Sulston
Physiology/medicine

Richard Adolf Zsigmondy
Chemistry

Santiago Ramón y Cajal
Camillo Golgi
Physiology/medicine

Frits Zernike
Physics

Günter Blobel
Physiology/medicine

Ahmed A. Zewail
Chemistry

Harald zur Hausen
Physiology/medicine

Osamu Shimomura
Martin Chalfie
Roger Tsien
Chemistry

In close collaboration with ZEISS staff

Company Presentation – ZEISS Medical Technology
Financial highlights
2018/18

5.817 billion euros revenue
772 million euros earnings (EBIT)
≈30,000 employees (worldwide)
Represented worldwide
Sites

Around 25 research and development centers
Around 30 production sites

Headquarters
Oberkochen

Over 60 sales and service sites
Represented in over 50 countries

Around 30,000 employees
Segments 2017/18

- **Semi-conductor Manufacturing Technology**
  - Revenue: 1,531* million euros
  - Employees: ≈ 3,400 employees

- **Industrial Quality & Research**
  - Revenue: 1,549* million euros
  - Employees: ≈ 6,800 employees

- **Medical Technology**
  - Revenue: 1,546* billion euros
  - Employees: ≈ 4,900 employees

- **Consumer Markets**
  - Revenue: 1,106* million euros
  - Employees: ≈ 10,500 employees

*As per 30 September 2018

**The values deviate from the published figures of Carl Zeiss Meditec AG as a result of different consolidation models.
Improving quality of life

With innovations for ophthalmology and microsurgery, ZEISS Medical Technology is contributing to progress in medicine. Our products and solutions aim to help physicians to improve patient outcomes and their patients’ quality of life.
Our Aspiration
Enable doctors to efficiently and effectively improve the quality of life of patients and drive the progress of medicine

Our Vision
Become the partner of choice for the doctors in our segments.
As a world-leading medical technology company, we drive progress in medicine, enabling doctors to achieve the best possible outcomes for their patients.

**Ophthalmic Devices**
- Comprehensive solutions to diagnose and treat eye diseases
- Systems and consumables for cataract, retinal and refractive surgery
- Focus on networking of systems and the integrated management of data, to make workflows in hospitals and medical practices efficient

**Microsurgery**
- Complete product range of visualization solutions for minimally invasive surgical treatments (e.g. Neuro, ENT, spinal, dental)
- Intraoperative diagnostics to enhance effectiveness and safety of surgical procedures complete with cutting-edge video technology and three-dimensional imaging

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**Ophthalmic Diagnostics**

**Refractive Laser Surgery**

**Surgical Ophthalmology**

**Visualization**

**Surgical Oncology**
Results at a Glance (FY 17/18)
Broad Product Portfolio, Balanced Regional Set-up

Growth & Revenue Split by Regions

- Americas: 31.7%
- EMEA: 29.5%
- APAC: 38.8%

Growth & Revenue Split by SBUs

- Microsurgery: 27%
- Ophthalmic Devices: 73%

All figures as reported.

SBU: Strategic Business Unit
Carl Zeiss Meditec
Company Snapshot

- Headquarters in Jena, Germany
- Around 3,050 employees worldwide
- Listed on the TecDAX
- 59% of shares held by Carl Zeiss AG

- Significant sales growth over the last five years
Global Presence
More Than 30 Sites Worldwide
Executive Board
Carl Zeiss Meditec AG

Dr. Ludwin Monz
President & CEO
Carl Zeiss Meditec AG

Justus Felix Wehmer
CFO
Carl Zeiss Meditec AG

Jan Willem de Cler
Member of the Management Board
Carl Zeiss Meditec AG
Fascinating Facts
Fascinating Facts
ZEISS Medical Technology

Did you know that ... 

... an amazing **4 million surgeries** have been performed with the **OPMI PENTERO 900 or the OPMI Pentero** around the globe?

... around **75 percent of all cataract patients** come into contact with **a product from ZEISS** during their treatment?

... **over 15 million cataract operations** are performed with **ZEISS surgical systems** all over the world every year?

... today, **more than half of all Optical Coherence Tomography Systems (OCT)** in ophthalmological practices are **ZEISS OCTs**?

... in FY 15/16, **ZEISS Medical Technology has invested 12.3 percent of its revenue in Research & Development**?
Product Portfolio
### Broad Product Portfolio

**We Offer Our Customers an Extensive Portfolio**

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<th>Customers</th>
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<th>Products</th>
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<td>Ophthalmic Devices</td>
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<td>Hospitals</td>
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<td>Clinics</td>
<td>Surgical Ophthalmology</td>
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<td>Ambulatory surgery centers</td>
<td>Visualisation &amp; Microsurgery</td>
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<td></td>
<td>Radiotherapy</td>
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Solution Provider
More than 100 Years of Leadership in Medical Technology
Gold Standard Products Defining the Market

IOLMaster®
OPMI®
HFA™
OCT 1

Pace-setting innovation for more than 100 years

Slit lamp
OPMI®
HFA™ Perimeter
OCT 1

IOLMaster®
OPMI® PENTERO
VisuMax® System
The Cataract Workflow
Integrating Products into Systems

For Better Treatment Efficiencies and Improved Patient Outcomes

IOLMaster®  VISALIS phaco®  OPMI® LUMERA® AT LISA tri®  CALLISTO eye®

Diagnosis  Surgery  Data Management Solution
Identifying needs & providing solutions

Implementing
In the practice and the OR
- Training
- Service
- Clinical application specialists
- Technical support

Ongoing service and support for maximum uptime & practice efficiency.
Global MEGA Trends
Long-term trends significantly boost our growth

Global MEGA Trends

Demographic Change
Technological Change
Globalisation
Global MEGA Trends
Several Key Trends are Influencing Our Markets

1. Aging of the population and growing affluence
2. Increasing information access and awareness
3. Budget constraints
4. Growing patient load, growing expectations
5. Rising access to health care in RDEs
Demographic Change
The Proportion of Older People is Growing
Demographic Change
Comprehensive Solutions for Typical Age-related Diseases

"The proportion of older people in the overall population is growing in many parts of the world. We offer comprehensive solutions for the diagnosis and treatment of typical age-related diseases."

Dr. Ludwin Monz
President & CEO
Demographic Change
Innovations for Age-related Diseases

40 %
of the population
will develop cataracts

Lens clouded by cataract

Normal vision  Vision with cataract

CALLISTO eye® assists cataract surgeons with the precision alignment of IOLs
Technological Change
The Medical Sector is Rapidly Changing
Minimally-invasive refractive laser surgery
with ReLEEx SMILE

Patients have high expectations of clinical outcomes

ReLEEx® SMILE: Minimally invasive treatment method sets new standards in refractive surgery
Technological Leadership
The Next Generation of Surgical Microscopes

Brilliant visualization in Neurosurgery with ZEISS KINEVO 900
Technological Leadership
Innovation in Brain Tumor Treatment

Brain tumor treatment with INTRABEAM 600
Globalisation
The World is Converging
Globalisation
We Are Well Aware of Our Customers‘ Demands

“Through our global network we are well aware of our customers‘ demands. We use this knowledge to define standards which we then put into practice through international training courses.”

Dr. Ludwin Monz
President & CEO
Global Knowledge
Sharing Knowledge Through Worldwide Training with the ZEISS ACADEMY

Training workshop in Hong Kong with customers

Employee training in Jena
R&D Centers in rapidly developing economies
Corporate Social Responsibility
Corporate Social Responsibility
Eyesight is Not „Normal“ For Everyone

285 million
People are visually impaired

39 million
people are blind

1-2 million
people go blind per year

ZEISS and the CBM

- The Christoffel Mission for the Blind (CBM) is an international aid organization.

- ZEISS and the CBM have been partners for many years: ZEISS supports the CBM in events and with products for its projects in Africa, Asia and South America.

11-year-old Kumar from Nepal has been given the gift of sight thanks to a cataract operation.
Corporate Social Responsibility

Supporting Doctors to Bring Highest Level of Clinical Care to Their Patients All Over The World

Support for the Fellowship program of the International Council of Ophthalmology (ICO):
Every year ZEISS invites ICO fellows – young doctors from developing countries.