

Unmet needs in Asia-Pacific (APAC)

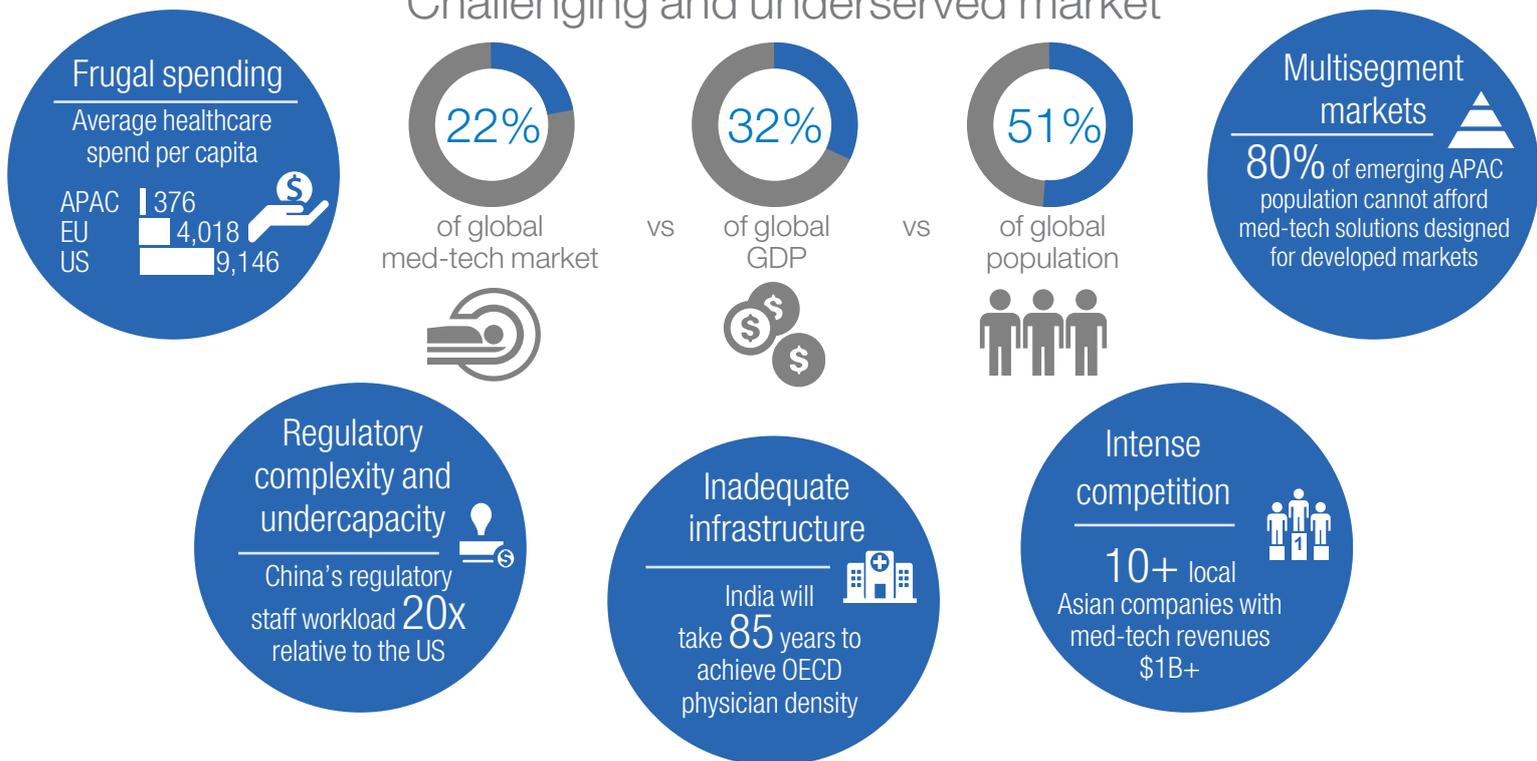


APAC med-tech market, \$ billion



Realities facing med-tech industry in APAC

Challenging and underserved market



Opportunities for industry-wide collaboration



Source: Amit Agarwal, Axel Baur, Shan He, Franck Le Deu, Satsheel Shrotriya, and Florian Then, *MedTech in Asia: Committing at scale to raise standards of care for patients*, Dec 2015, McKinsey.com