



EvaluateMedTech® World Preview 2015, Outlook to 2020



Medtech Industry Trends

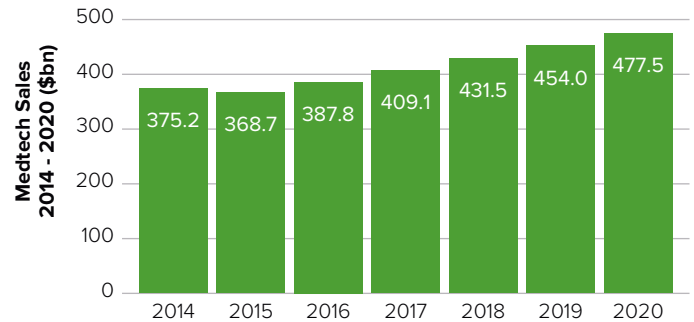
By 2020:

Worldwide medtech sales forecast to be **\$477.5 billion**

Compound Annual Growth Rate will be **4.1%** between 2014 and 2020

Medtech R&D spend forecast to reach **\$29.5 billion**

Medtech Sales 2014 to 2020 (\$bn)



Leader Board: 2020

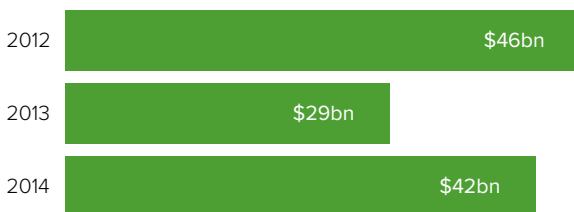
Company Sales	Medtronic	Set to be #1 with total medtech sales of \$34.9bn
Device Area	In Vitro Diagnostics (IVD)	#1 device area in 2020 with sales of \$67.3bn

Deal Analysis

Venture Financing and M&A Deal Values Rise in 2014



Value of Venture Financing Deals by Year (\$m)

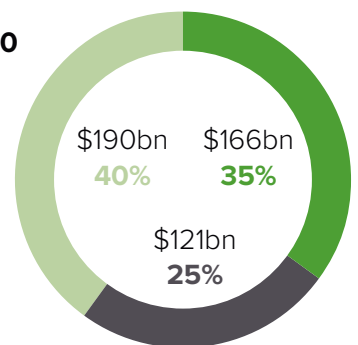


Value of M&A Deals by Year (\$bn)

Composition of WW Medtech Market in 2020

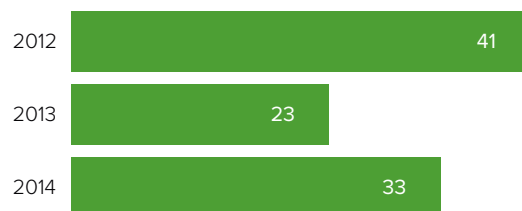
35% of WW Medtech Revenues Come from Top 10 Companies

- Top 10 Companies
- 11-30 Companies
- Rest of Market



FDA Regulatory Analysis

2014 PMAs increase vs 2013



New PMAs & HDEs in US

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www.evaluate.com

Evaluate Headquarters

Evaluate Ltd.
11-29 Fashion Street
London E1 6PX
United Kingdom
T +44 (0)20 7377 0800
F +44 (0)20 7539 1801

Evaluate North America

EvaluatePharma USA Inc.
15 Broad Street, Suite 401
Boston, MA 02109, USA
T +1 617 573 9450
F +1 617 573 9542

Evaluate Japan

Evaluate Japan KK
Akasaka Garden City 4F
4-15-1 Akasaka Minato-ku
Tokyo 107-0052 Japan
T +81 (0)80 1164 4754