

World Preview 2013, Outlook to 2018

The Future of Medtech



Medtech Industry Trends

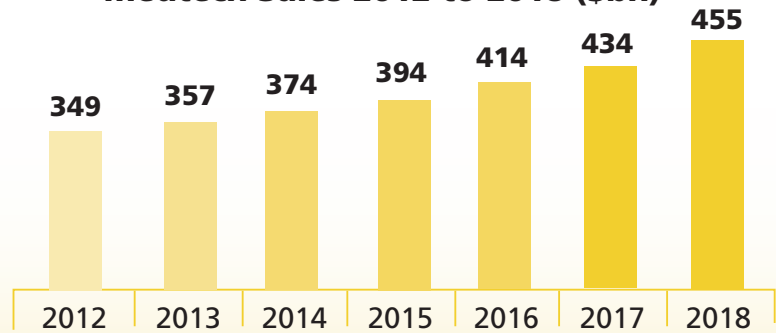
By 2018:

Worldwide medtech sales forecast to be **\$455 billion**

Compound Annual Growth Rate will be **4.5% between 2012 and 2018**

Medtech R&D spend forecast to reach **\$26.7 billion**

Medtech Sales 2012 to 2018 (\$bn)



Leader Board: 2018

| | | |
|----------------------|----------------------------|--|
| Company | Johnson & Johnson | Set to be #1 with medtech sales of \$33.4 billion |
| Device Area | In Vitro Diagnostics (IVD) | #1 device area in 2018 with sales of \$58.8 billion |
| R&D Spend | Siemens | Highest medtech R&D spend in 2018: \$2 billion |

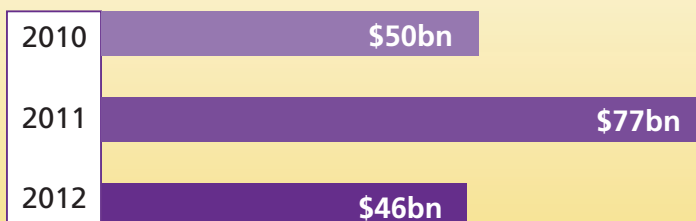
Deals Analysis

Venture Financing and M&A Deal Values Fall in 2012

Value of Venture Financing Deals by Year



Value of M&A Deals by Year



FDA Approvals Analysis

2012 FDA Approvals on Par with 2011

New PMA & HDE Approvals in U.S.



510(k) Clearances in U.S.

