



ÖSSUR  
CAPITAL MARKETS DAY  
27 November 2012



*Life Without Limitations®*





## **ÖSSUR CAPITAL MARKETS DAY, NOVEMBER 27<sup>TH</sup> 2012**

### **LOCATION: DANISH ARCHITECTURE CENTRE, COPENHAGEN**

#### **AGENDA**

- 08:15-08:30 Registration and coffee
- 08:30-08:35 Welcome – Sigurborg Arnarsdóttir, IR Manager
- 08:35-09:00 Strategy and Key Highlights – Jón Sigurðsson, President & CEO
- 09:00-09:15 Össur Capital Structure – Hjörleifur Pálsson, CFO
- 09:15-09:35 The Prosthetics Market – Kim De Roy, VP of Prosthetics Marketing
- 09:35-09:55 Break
- 09:55-10:30 R&D Indication Based Approach – Dr. Þorvaldur Ingvarsson, EVP of R&D
- 10:30-11:15 Team Össur, Paralympics and the controversies – Richard Hiron, Clinical Specialist
- 11:15-11:20 Closing remarks – Jón Sigurðsson, President & CEO
- 11:20-12:00 Speakers available for questions and discussions
- 12:00-13:00 Lunch





# STRATEGY AND KEY HIGHLIGHTS

*Jón Sigurðsson*  
PRESIDENT & CEO



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# AGENDA



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TODAY



FUTURE



Partner to Olympian Oscar Pistorius, the **'Blade Runner'**



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**TODAY**



# ÖSSUR'S STRATEGIC FOCUS AREAS



Life Without Limitations®

EFFICIENCY

GROWTH

INNOVATION



*Oscar Pistorius, the Blade Runner*



Partner to Olympian Oscar Pistorius, the 'Blade Runner'



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# ÖSSUR TODAY



Life Without Limitations®

## EFFICIENCY

- Global leader in non-invasive orthopaedics
- Second largest player in the world in prosthetics & bracing and supports

## GROWTH

- Positive industry growth drivers
- Favorable market position
- Good margins and strong cash flow

## INNOVATION

- Growing through innovation
- Technical leader in the market

### *Worlds First Bionic Foot:*



*SYMBIONIC™ LEG*



Partner to Olympian Oscar Pistorius, the 'Blade Runner'

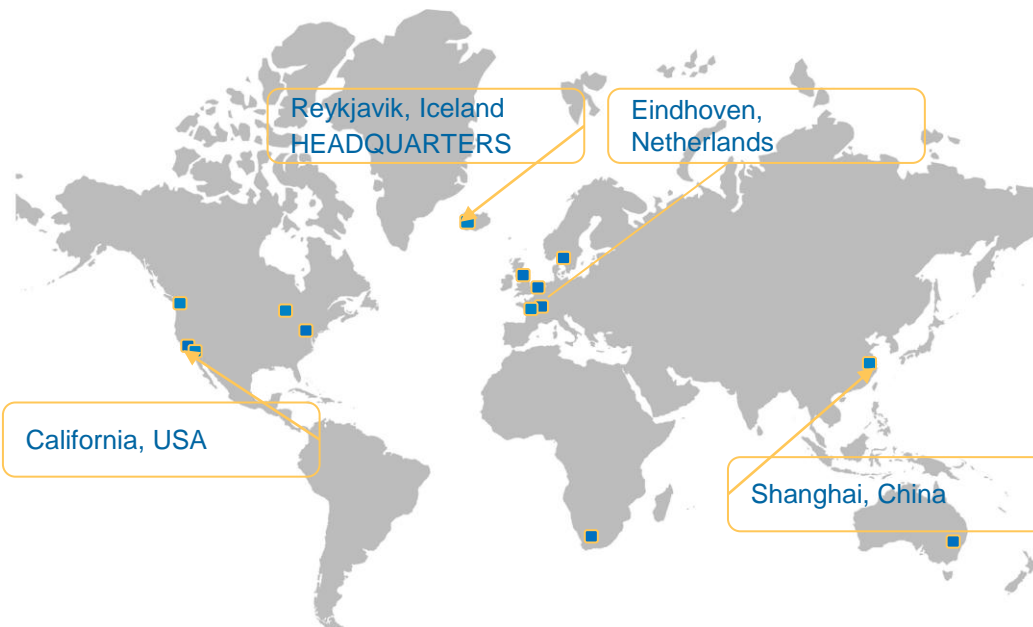


# ÖSSUR – WE ARE A GLOBAL OPERATION

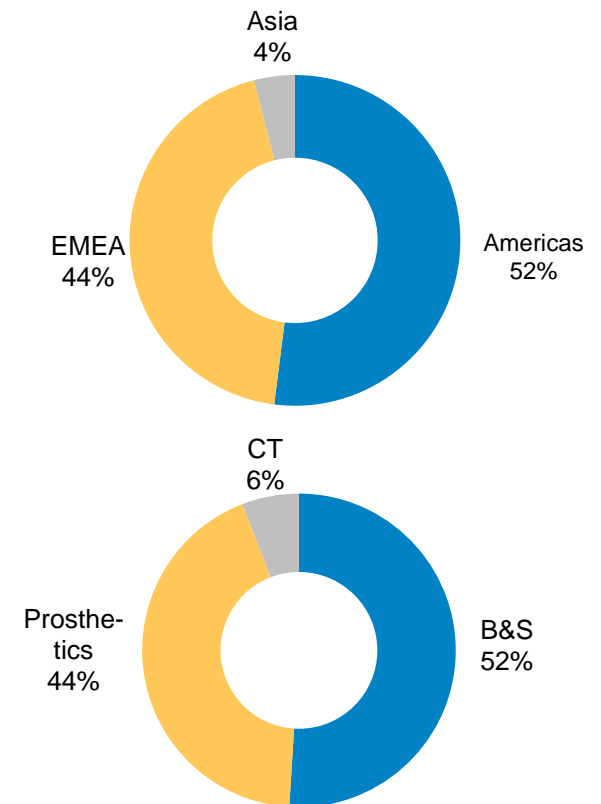


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Well diversified- 15 locations - 1850 employees



Sales Split:



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# BRACING AND SUPPORTS – FRAGMENTED MARKET



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## BRACING AND SUPPORTS MARKET

*Products for therapeutic and preventive purposes:*

- Market size: USD 2,700 m
- Market growth: 3-5%
- Market share ~7%
- Fragmented market

### UPPER EXTREMITY SOFT GOODS & SUPPORTS

Spectra® Wrist



### SPINAL BRACING

Miami J® collar



### BACK SOFT GOODS & SUPPORTS

Miami Lumbar Belt™



### KNEE BRACING

Unloader One®



### FOOT & ANKLE SOFT GOODS & SUPPORTS

Rebound™ Air Walker



Partner to Olympian Oscar Pistorius, the 'Blade Runner'



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# BRACING AND SUPPORTS PLATFORM



Life Without Limitations®

Osteoarthritis



+



=



Unloader® knee brace

Iceross® liner

Unloader One®

*Unload for pain relief and increased mobility*

Functional healing



Miami Lumbar® belt



Post-up brace



Rebound® Air Walker

*Increase mobility while allowing tissue to heal with functional bracing*



Partner to Olympian Oscar Pistorius, the 'Blade Runner'



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## PROSTHETIC MARKET

### *Replacement of missing limbs*

- Market size: USD 850 m
- Market growth: 3%
- ~ 21% market share
- Consolidated market

#### SILICON LINERS



Iceross@Comfort Cushion

#### MECHANICAL KNEES



Total Knee®

#### BIONICS



RHEO KNEE®

#### ANKLES



Vari-Flex® with EVO™



Partner to Olympian Oscar Pistorius, the 'Blade Runner'





# PROSTHETICS - VALUE THROUGH INNOVATION



Life Without Limitations®

Wood & steel

Mechanical

Current and Future Platforms



\$ 10



\$ 2,500



\$ 70



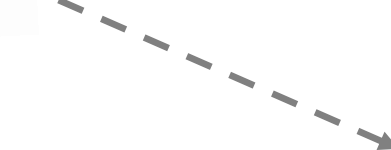
\$ 2,000



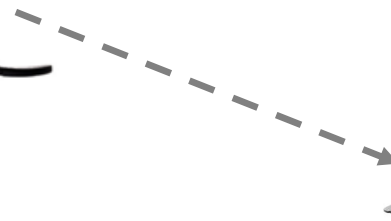
\$ 14,000



\$ 35,000



\$ 9,000



USD 29,000



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# HIGHLIGHTS 2012



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## MARKET ENVIRONMENT

- Positive outlook for EMEA and Asia
- Impact from RAC audits expected to continue in Americas

## STRONG PRODUCT PIPELINE

- Comprehensive bionic platform
- Low activity solutions
- Strong bracing and supports pipeline

## CONSOLIDATING MANUFACTURING LOCATIONS

- In-sourcing to our facility in Mexico is according to plan and will result in increased manufacturing efficiency



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# FUTURE





# EXTERNAL ENVIRONMENT



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## EXTERNAL ENVIRONMENT

- Austerity measures



- Changes in healthcare delivery
- Temporary market shift from high (K3) to lower level active prosthetics products (K2) in the US

- Demography



- Aging and more active population

- Technical development



- Continuous technology change and development



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# OUR FOCUS AREAS



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## EXTERNAL ENVIRONMENT

- Austerity measures

- Demography

- Technical development

## ÖSSUR'S STRATEGIC FOCUS AREAS

Efficiency

Growth

Innovation



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# OUR STRATEGY



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## ÖSSUR'S STRATEGIC FOCUS AREAS

Efficiency

### •• Strive to increase efficiency by:

- operational excellence
- process improvement initiatives
- establishing closer partnership with our customers

Growth

### •• Achieve growth by:

- effectively prove and communicate the outcomes of our products
- increase sales from emerging markets
- leverage on OA opportunities

Innovation

### •• Increase value through innovation by:

- being at the forefront of indication-related innovation in functional healing, osteoarthritis & prosthetics
- improving our customers' mobility



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## GOING FORWARD....



*Life Without Limitations®*



We generate value for individuals and healthcare systems



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*2/3 of the Paralympics amputee finalists 2012 ran on Össur feet*





# ÖSSUR CAPITAL STRUCTURE

*Hjörleifur Pálsson*  
CFO



*Life Without Limitations®*

# MESSAGE TO MARKET 2012 AGM



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## 2012 Annual General Meeting

- Össur is a stable cash generating company
- Strong balance sheet with rapidly decreasing leverage
- If no material investment opportunities materialize funds will be distributed to shareholders



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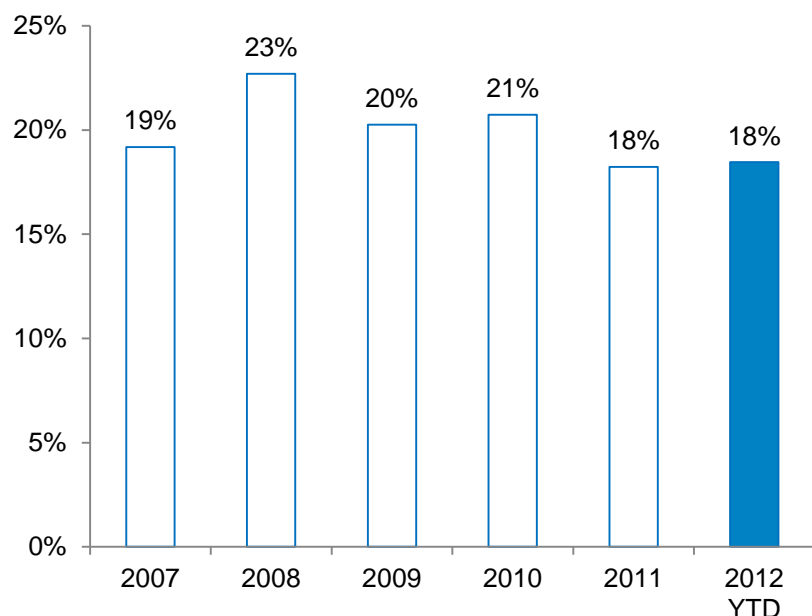


# STRONG PROFITABILITY AND CASH FLOW

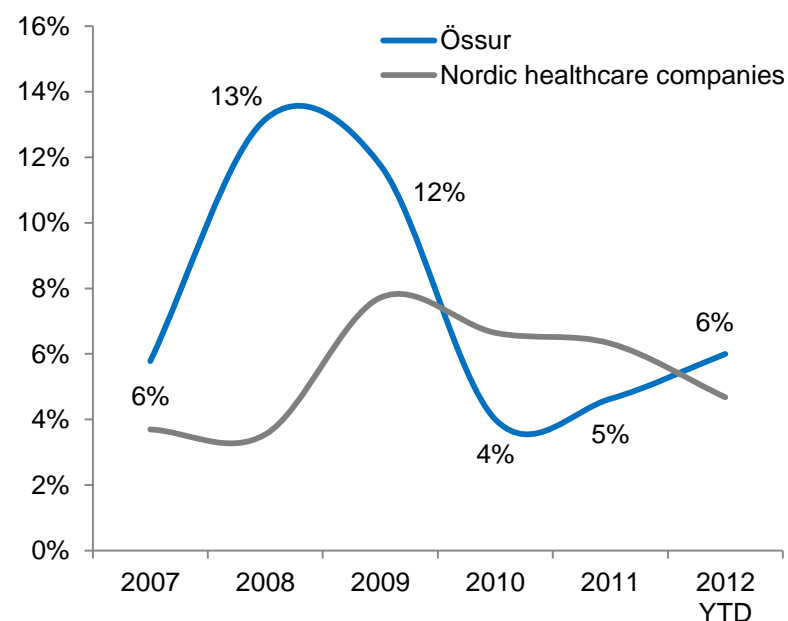


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## EBITDA margin



## Free Cash Flow Yield\*



\* **FCF Yield** is free cash flow (excluding acquisitions) divided by market capitalization

Source: Broker's Research



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# STRONG BALANCE SHEET



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USD millions	Q3 2012	Q3 2011
EBITDA	18 19%	20 20%
Cash generated by operations	17 17%	18 18%
Net debt/EBITDA	1.3x	1.6x
Equity Ratio	66%	63%



Stable EBITDA margins and consistent cash conversion levels



Constant deleveraging

USD millions	30.9. 2012	31.12. 2011
Total assets	599	580
Net interest-bearing debt	95	111
Equity	397	365



Low leverage and strong balance sheet



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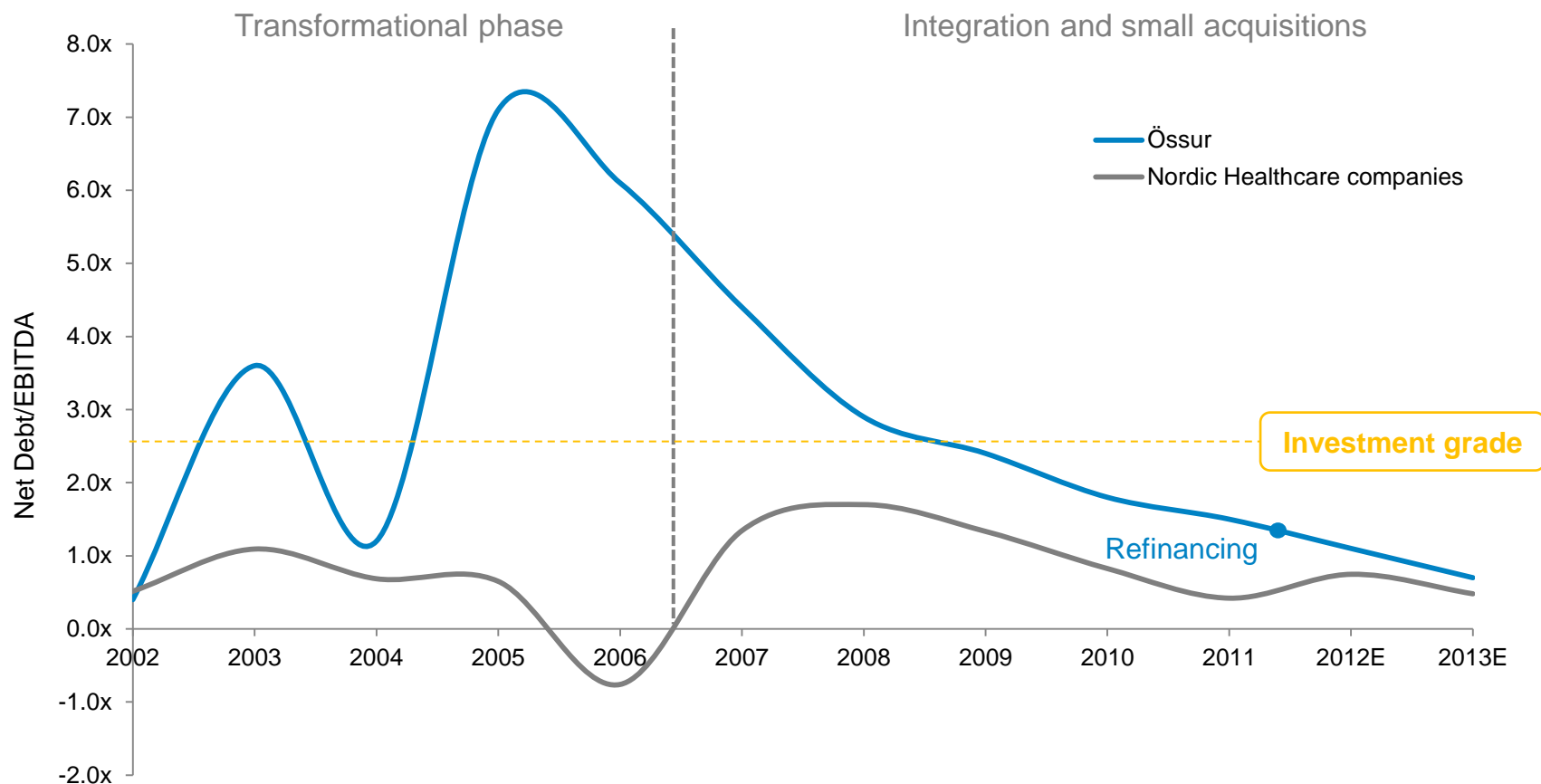


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# LEVERAGE – INVESTMENT GRADE



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Source: Broker's Research



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# ACCESS TO FINANCING



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## External environment

## Össur

### Debt Market

- Bank lending in general has remained restricted since 2008
- „Relationship lending“

- Low leverage and open credit lines
- Strong banking partners:



### Equity Market

- Equity markets volatile
- Difficult to foresee risk appetite of market

- Strong investor base
- Shareholder base broadened by CPH listing in 2009



Partner to Olympian Oscar Pistorius, the **'Blade Runner'**

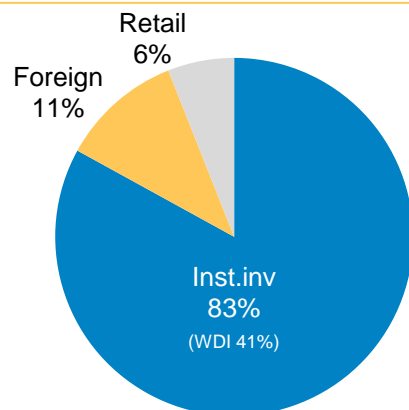




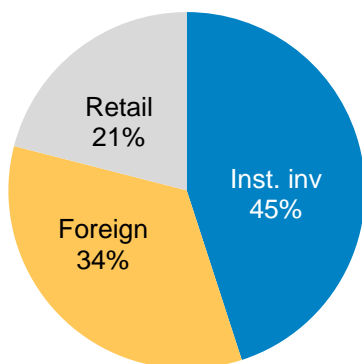
# SHAREHOLDERS PORTFOLIO



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Össur shareholder structure



Danish Mid-Cap

- Dominated by institutional investors
- Aim to further diversify geographical distribution
- Increased focus on activities with private investors
- Continue to build up the brand and awareness

*Increased focus on private investors*

*Potential dividend payments likely to attract new investors*

Source: Össur hf. and VP Oct 2012



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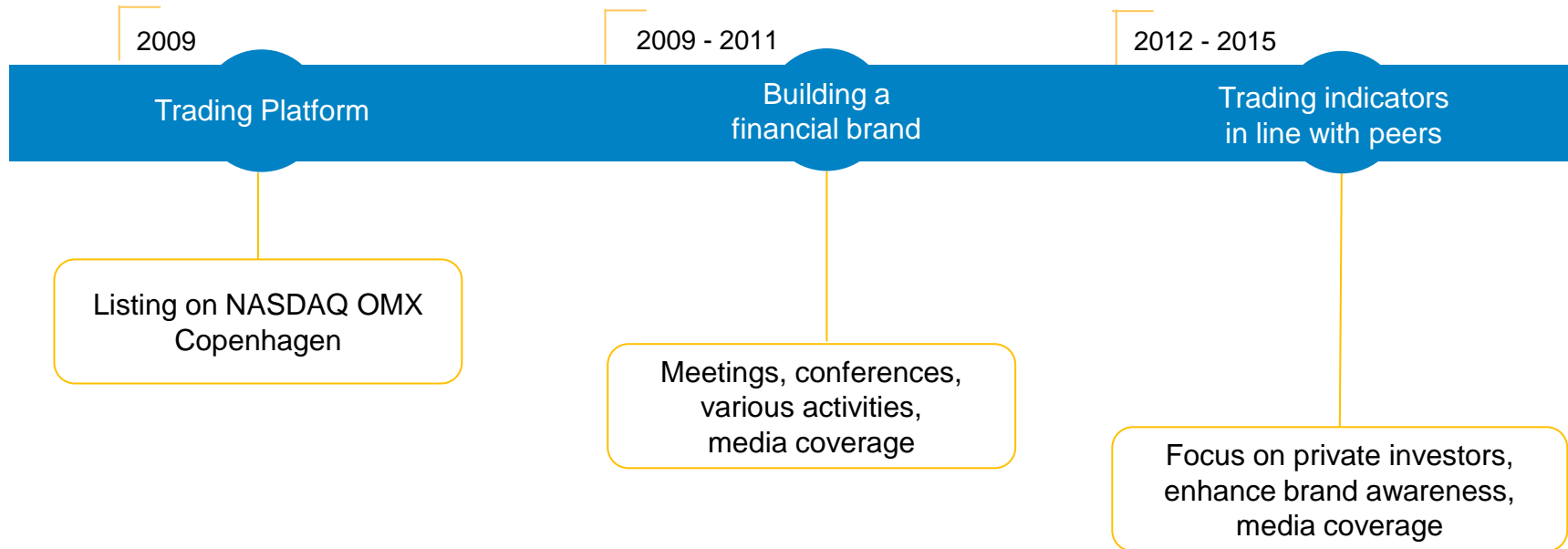
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# FINANCIAL BRANDING



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*Focus on activities to attract private investors to improve liquidity and trading performance*



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# COMMITTED INVESTMENT CAPACITY IF DISTRIBUTION



Life Without Limitations®

	No Distribution	10 M	20 M	30 M	50 M
Equity Ratio	66%	63%	61%	58%	53%
Net debt/EBITDA	1.3x	1.4x	1.5x	1.7x	1.9x
Committed Investment Capacity	USD 70m	USD 60m	USD 50m	USD 40m	USD 20m

*Note: Based on Q3 2012 figures*



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# CLOSING REMARKS



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## KEY MESSAGE

- Strong profitability and cash flow provides solid foundation
- Rapidly decreasing leverage
- Strong balance sheet
- Commitment to raise awareness and trading performance
- Potential dividend policy discussed at 2013 AGM



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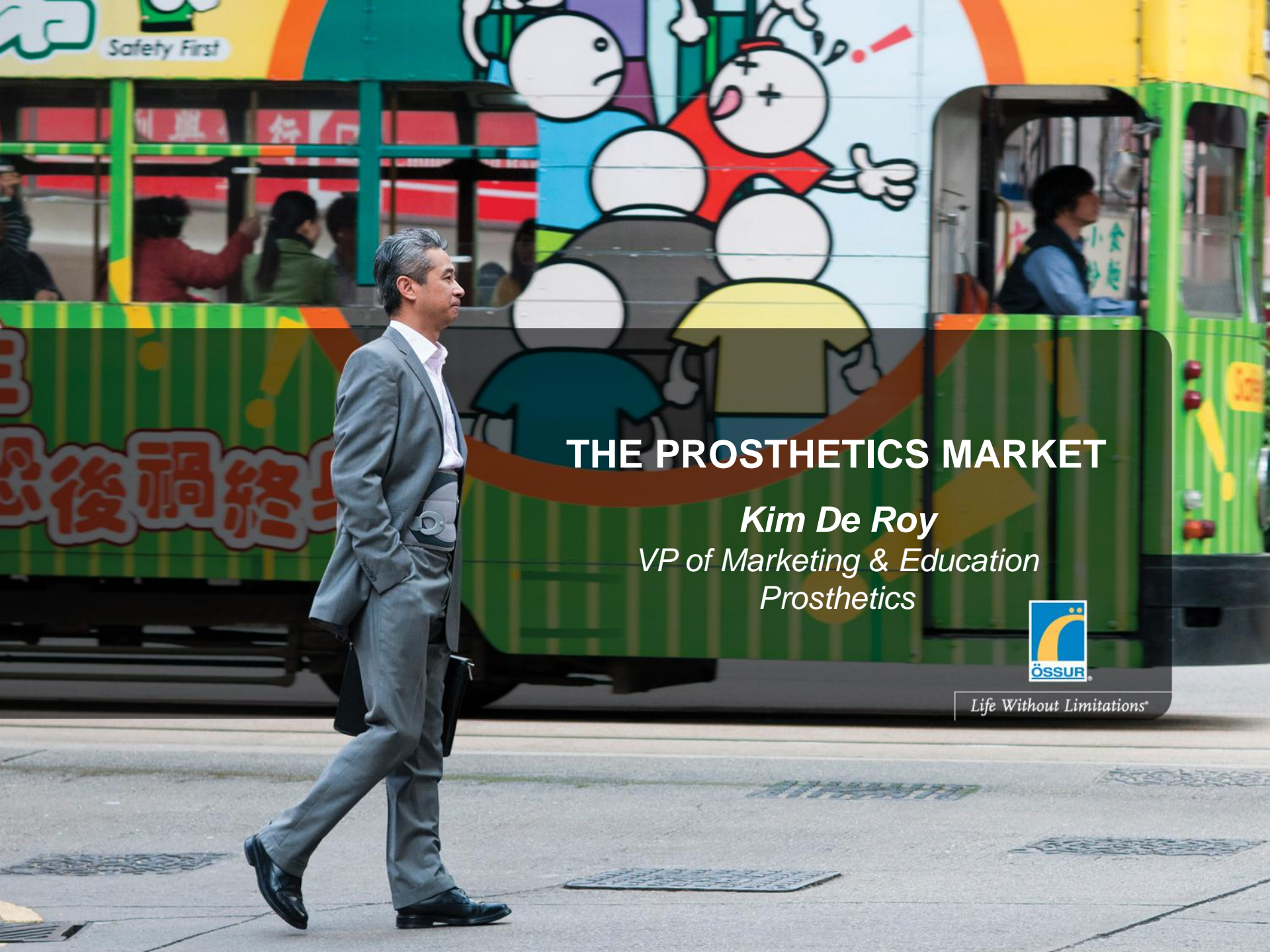
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# WE IMPROVE PEOPLE'S MOBILITY



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# THE PROSTHETICS MARKET

*Kim De Roy*

*VP of Marketing & Education  
Prosthetics*



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# MARKET FUNDAMENTALS



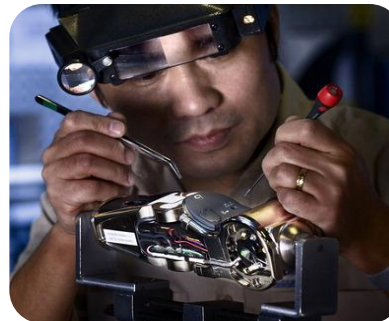
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## MARKET DYNAMICS

- Vascular diseases and diabetes
- Aging population
- Changed lifestyle
- Technological developments

## CURRENT MARKET ENVIRONMENT

- Size: USD 850 million
- Market growth ~ 3%
- Market share ~ 19-21%
- Over 95% of sales reimbursed



# DECISION MAKING UNIT



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	Prescriber	Care Provider	Payer	User
MEMBERS	Rehab physician Surgeon	O&P (97%) Rehab Center (3%)	Insurance Public & Private (95%) Private Pay (5%)	Amputee
INFLUENCE TRENDS	↑	↓	↑	Variable
ÖSSUR COVERAGE	INCREASING FOCUS	STABLE GOOD COVERAGE	INCREASING FOCUS	INCREASING FOCUS

***Successfully commercialize innovation by effectively proving and communicating the functional, clinical and economic outcomes of products to the different members of the decision making unit.***



# MARKET OPPORTUNITIES & APPROACH



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MARKET OPPORTUNITY		OSSUR	GO-TO-MARKET STRATEGY					
O&P	PRODUCT SEGMENT	MARKET TRENDS		OPPORTUNITY	PRODUCT STRATEGY	CUSTOMER FOCUS	MARKETING STRATEGY	OUTCOME
	Low active Vascular / Diabetic Amputee	↑	↓	<div></div>	PRODUCT LINE EXPANSION  PRODUCT DEVELOPMENT  TECHNLOGY UPGRADE	MEET THE REQUIREMENTS OF A LARGER CUSTOMER BASE:  - CPO  - PAYER  - PRESCRIBER  - USER	MEDICAL MARKETING SUPPORTING REIMBURSEMENT REQUIREMENTS	MARKET SHARE  GROWTH  PROFITABILITY
	Moderate to high active amputee	↑	↓	<div></div>			EXPAND CLINICAL PARTNERSHIP TO ENTIRE DECISION MAKING UNIT	
	Socket and Interface Solutions	↑		<div></div>			MAINTAIN PRICE LEADERSHIP BASED ON INNOVATION	
	Bionics Solutions	↑		<div></div>				
				<div></div>				

# PRODUCT LAUNCHES 2012



Life Without Limitations®

*Eight new products and product upgrades introduced during the year.  
Main focus on strengthening and broaden the product portfolio*

Q1 2012

## Q1 Highlights

Focus on products with wide user profile



Q2 2012

## Q2 Highlights

SYMBIONIC LEG & Seal In V commercial launch



Q3 2012

## Q3 Highlights

Focus on products for low active users



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# AMERICAS – REIMBURSEMENT PRESSURE



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## CHARACTERISTICS / MARKET TRENDS

- Payer audit ↑ (pre- & post payment)
- Accelerated consolidation in O&P Services
- Importance ↑ of the physician and payer in the decision making process
- Evidence based care ↑



## OPPORTUNITIES

- Payer submission support
- Clinical partnership
- Mutli-disciplinary support to meet needs of the decision making unit (DMU)
- Clinical evidence & Medical Marketing



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## CHARACTERISTICS / MARKET TRENDS

- Importance ↑ of the physician and payer in the decision making process
- Regulated process for new product acceptance
- Direct entry of several high-end suppliers



## OPPORTUNITIES

- Multi-disciplinary support to meet needs of the decision making unit (DMU)
- Clinical evidence & Medical Marketing to support product reimbursement
- Accelerated acceptance of high-end solutions



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# ASIA – DIVERSE MARKET



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## CHARACTERISTICS / MARKET TRENDS

- Diverse markets
- Mature markets in Japan and Australia
- High need for education, in frastructure and awareness of market participants
- Very small high-end segment



## OPPORTUNITIES

- Focus on China, Korea, SEA countries
- Grow from high-end to medium end market with the right product offering
- Brand building and education efforts essential for success



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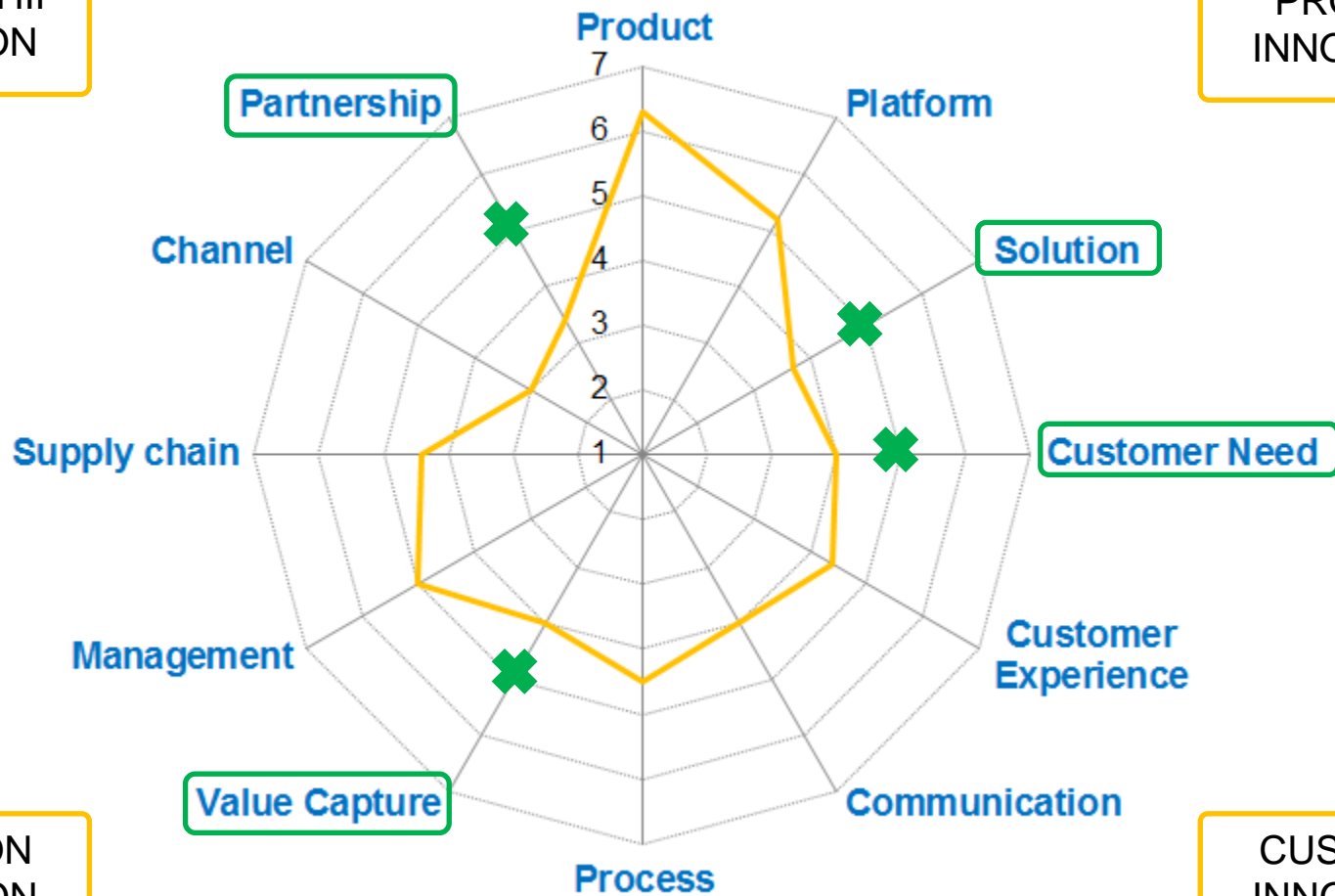
# ÖSSUR VALUE PROPOSITION



Life Without Limitations®

RELATIONSHIP  
INNOVATION

PRODUCT  
INNOVATION



OPERATION  
INNOVATION

CUSTOMER  
INNOVATION

## 3 – 5 YEAR FOCUS

... ÖSSUR WILL GROW PROSTHETICS BY

- ADDRESSING THE CLINICAL REQUIREMENTS OF THE LOW ACTIVE AMPUTEE
- ANSWERING TO THE REQUIREMENTS OF THE DMU THROUGH MEDICAL MARKETING AND CLINICAL PARTNERSHIP
- PURSUING EXPANSION INTO EMERGING MARKETS



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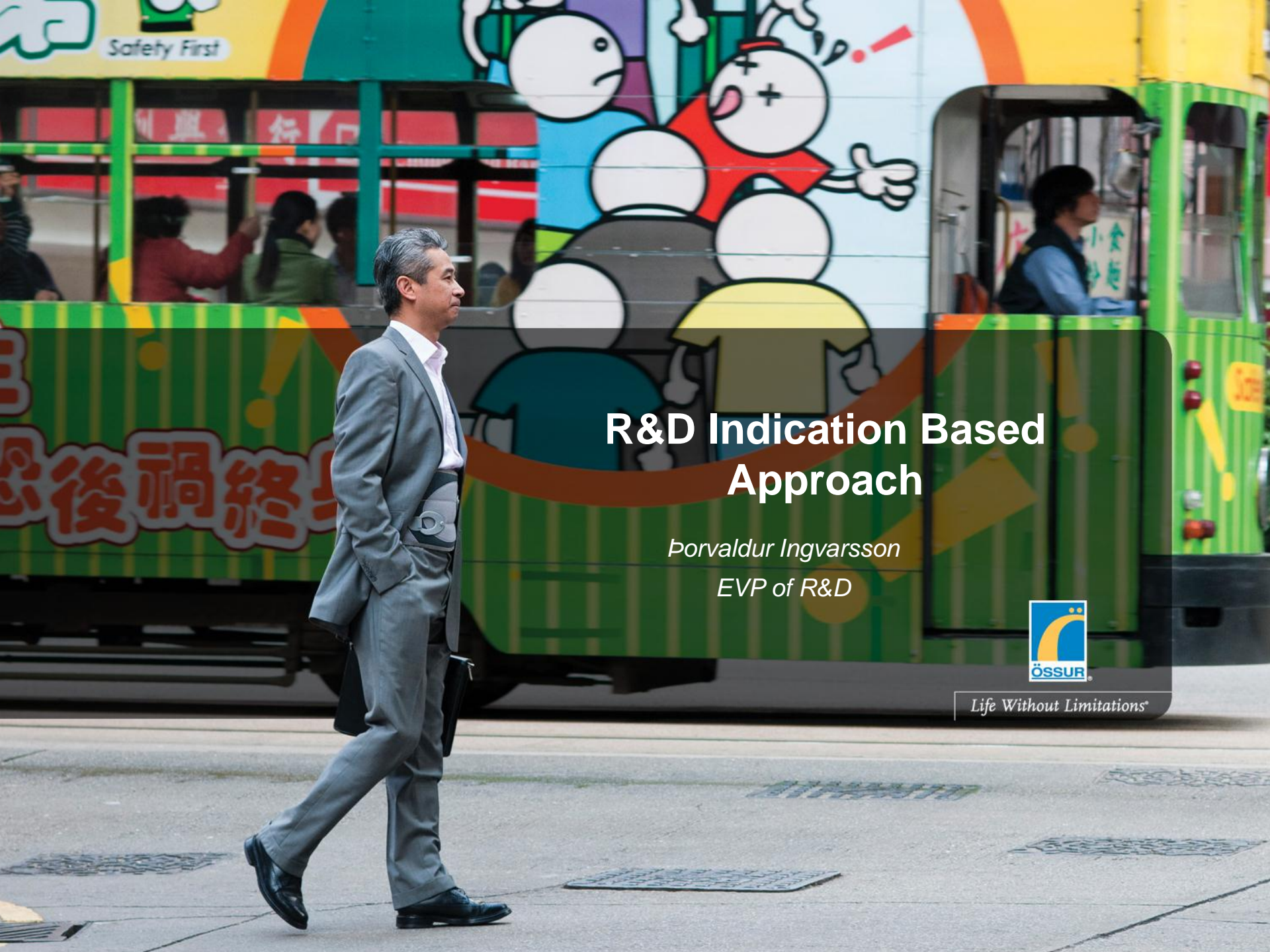
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# WE IMPROVE PEOPLE'S MOBILITY



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# R&D Indication Based Approach

*Þorvaldur Ingvarsson*

*EVP of R&D*



*Life Without Limitations®*



## R&D VISION:

To be the industry leader that creates the future through clinically validated innovative solutions



Partner to Olympian Oscar Pistorius, the 'Blade Runner'





# THE WAY TO OUR R&D VISION



Life Without Limitations®

*With indication based approach and building comprehensive product lines, Össur will transform the manner in which people's mobility is improved*

Indication based  
approach

Comprehensive  
product lines

Clinically validated  
innovative solutions



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# R&D VISION – INDICATION BASED APPROACH



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## R&D VISION:

To be the industry leader that creates the future through clinically validated innovative solutions

PROSTHETICS



FUNCTIONAL HEALING



OA



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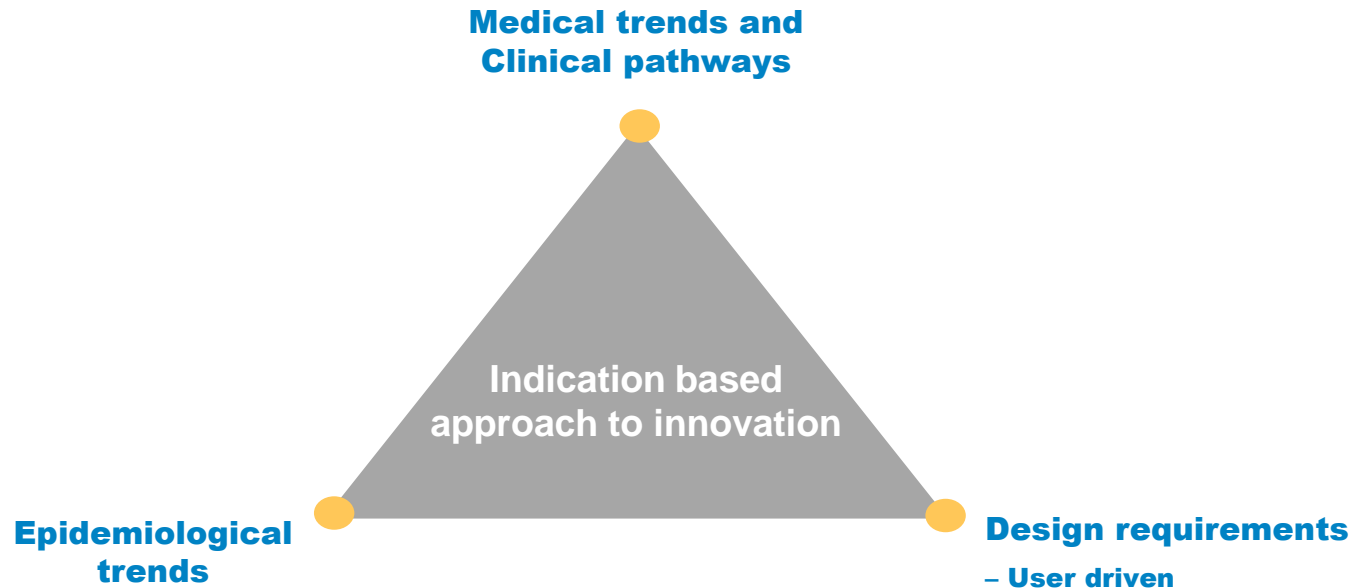


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# INNOVATION - INDICATION BASED APPROACH



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*“ Design is how it works “*



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# WE NEED TO UNDERSTAND THE CLINICAL PATHWAY DIABETIC/AMPUTATION



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CHANCE OF RECOVERY:

AMPUTATION AND REGAINED MOBILITY:

Compression  
therapy

Diabetic  
walker

Post -op  
solution

Mechanical  
products



Bionics  
Proprio

- Where are unsolved medical problems?
- Do we already have products to solve the medical problem?
- Where can we use innovative technology to solve the medical problem?



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# R&D VISION – INDICATION BASED APPROACH



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## R&D VISION:

To be the industry leader that creates the future through clinically validated innovative solutions

### PROSTHETICS



### FUNCTIONAL HEALING



### OA



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# PROSTHETICS – TECHNICAL LEADER

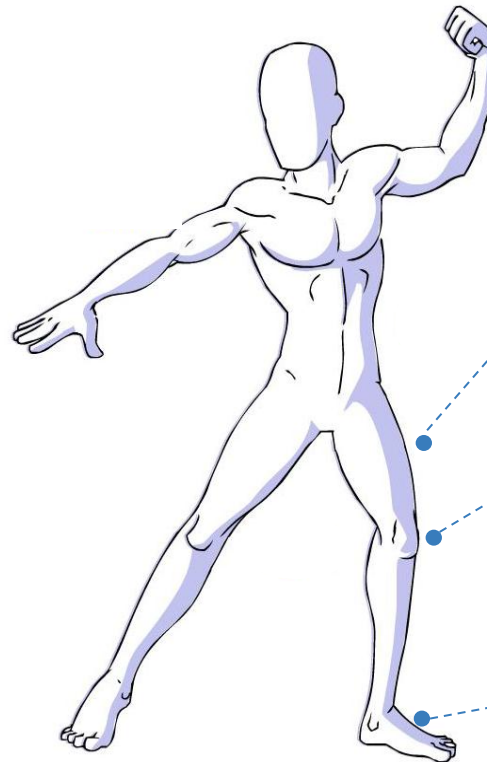


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*Increase mobility for amputees*

## Epidemiology and medical trends:

- Aging population
- Increased diabetics
- Increased demand for functionality



### SILICON LINERS



IceroSS®Comfort Cushion

### BIONICS / MECHANICAL



RHEO KNEE®

Total Knee®

### ANKLES



Vari-Flex® with EVO™



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# LOW ACTIVITY SOLUTIONS



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## *The Balance Line:*



*Balance knee and the Flex-Foot balance were designed to offer less active users security and stability*

- Increased demand for low-active products because of aging and more active population
- Increased clinical need and reimbursement challenges
- Continue to design an innovative approach for low active amputees



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# BIONICS PLATFORM - WORLD'S FIRST BIONIC LEG



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## SYMBIONIC™ LEG

### MOVE NATURALLY WITH THE FIRST & ONLY COMPLETE BIONIC LEG.

Introducing SYMBIONIC™ LEG, the first complete bionic leg combining a microprocessor knee and a powered microprocessor foot with proactive ankle flexion.

Available in 9 sizes (22-30cm) and with a weight limit of 225 lbs, SYMBIONIC LEG is appropriate for a broad spectrum of above knee amputees. Feedback from users and prosthetists has been overwhelmingly positive, indicating feelings of increased safety, symmetry and confidence that result in a regained ability to move naturally.



**"I no longer see obstacles.**

*I used to avoid most uneven surfaces. Now, I have the confidence to go where I want. As a prosthetist, I recommend the SYMBIONIC LEG to the majority of above-the-knee amputees, including older amputees."*

— Jerry Swanson, CPO



bionic  
technology by ÖSSUR



Life Without Limitations®



SYMBIONIC™ LEG

## SYMBIONIC™ LEG

- Seamlessly unites the proven capabilities of RHEO KNEE® and PROPRIO FOOT®



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# R&D VISION – INDICATION BASED APPROACH



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## R&D VISION:

To be the industry leader that creates the future through clinically validated innovative solutions

PROSTHETICS



FUNCTIONAL HEALING



OA



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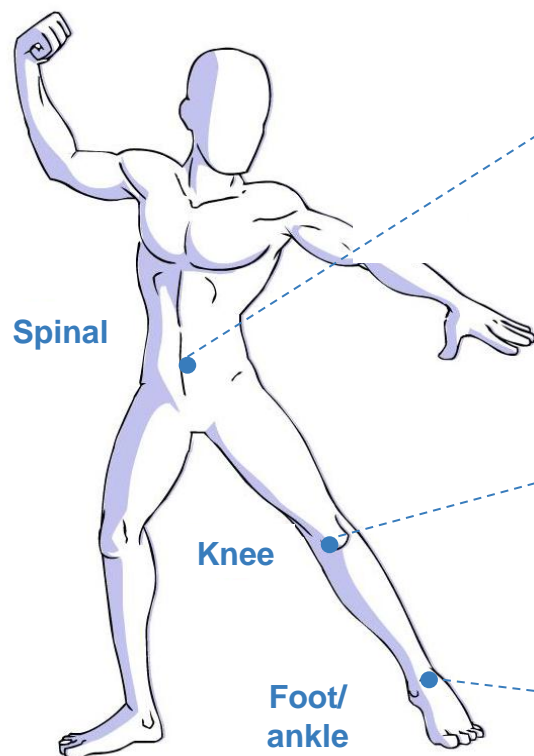


# FUNCTIONAL HEALING



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*Increase mobility while allowing tissue to heal with functional bracing*



LUMBAGO



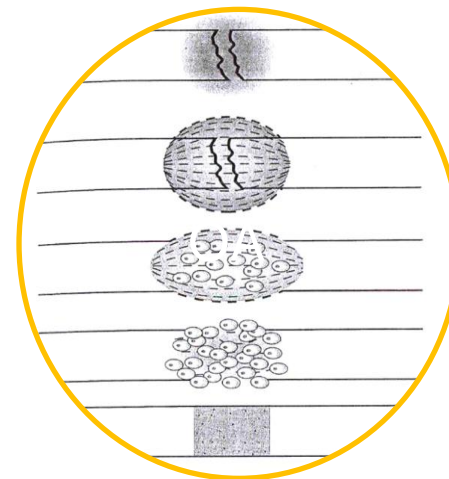
POST-OP



FRACTURE



HEALING PROCESS:



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# EXAMPLE OF CLINICAL PATHWAY FOR THE KNEE

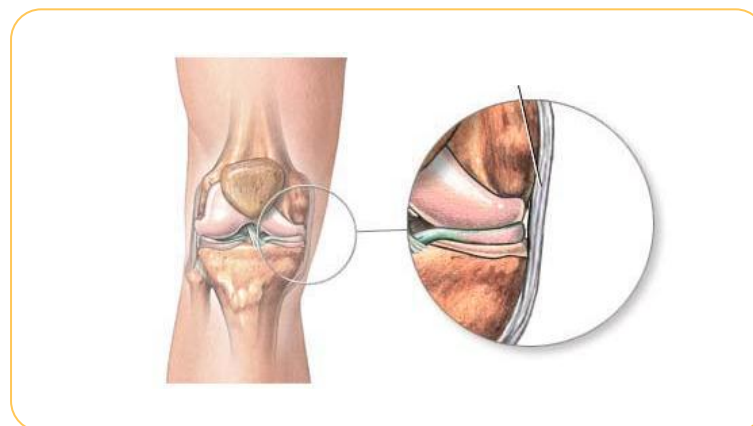
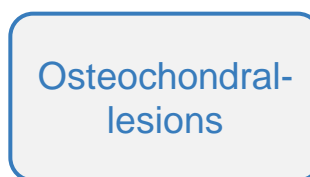
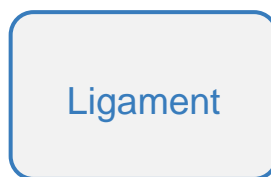


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PREVENTION

FUNCTIONAL HEALING

CHRONIC



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# ACHILLES TENDON RUPTURES - WALKERS INSTEAD OF CAST



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*Cast seen as the golden standard in Europe whereas walkers more frequently used in the US*

## ACHILLES TENDON RUPTURES



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OPERATION OR  
FUNCTIONAL HEALING



Össur Walker



Traditional cast



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# R&D VISION – INDICATION BASED APPROACH



*Life Without Limitations®*

## R&D VISION:

To be the industry leader that creates the future through clinically validated innovative solutions

PROSTHETICS



FUNCTIONAL HEALING



OA



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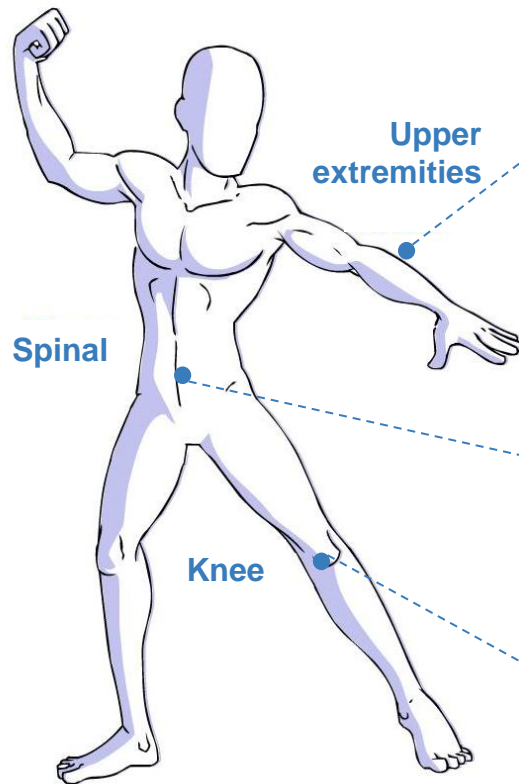
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# OSTEOARTHRITIS



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*Unload or immobilize for pain relief and increased mobility*



Hand OA



Hip OA

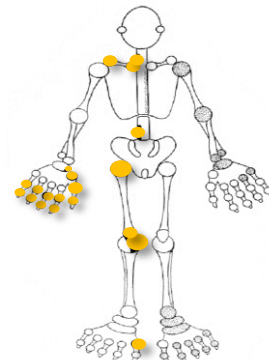
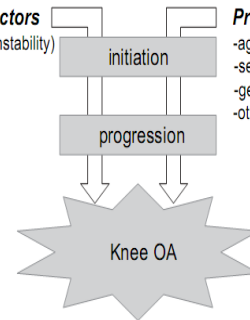


Knee OA



**Biomechanical factors**  
-chronic (overload & instability)  
-acute (injury)

**Predisposition**  
-age  
-sex  
-genetics  
-other systemic factors



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# OSTEOARTHRITIS - ATTRACTIVE MARKET



*Life Without Limitations®*

## Size:

Est. 5% of  
population  
have knee OA

## TKR:

Tremendous  
growth in total  
knee  
replacements

## Cost:

1-2.5% of  
GDP

## Driver:

Aging and  
active  
population

## Potential:

#4 leading  
cause of  
disability  
2020



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# ALTERNATIVE TREATMENT TO OSTEOARTHRITIS

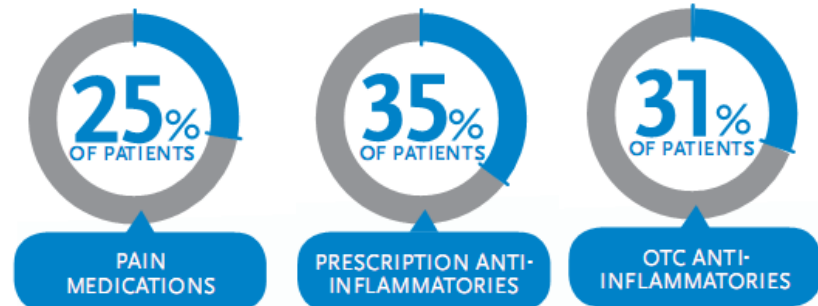


Life Without Limitations®

*The Unloader One Knee Brace is a non-invasive, economical treatment option for osteoarthritis, proven to reduce pain and improve mobility*



**Clinically proven:** Reported change in medication



Steadman Philippon Unloader One research



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# R&D VISION – INDICATION BASED APPROACH



*Life Without Limitations®*

## R&D VISION:

To be the industry leader that creates the future through clinically validated innovative solutions

PROSTHETICS



FUNCTIONAL HEALING



OA



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# GOING FORWARD.....



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## KEY MESSAGE

- Key innovation drivers: epidemiology, medical trends and clinical pathways
- Effectively prove and communicate clinical outcome
- Innovation approach will be indication based and user driven

**R&D Vision:** *To be the industry leader that creates the future through clinically validated innovative solutions*



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# WE IMPROVE PEOPLE'S MOBILITY



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