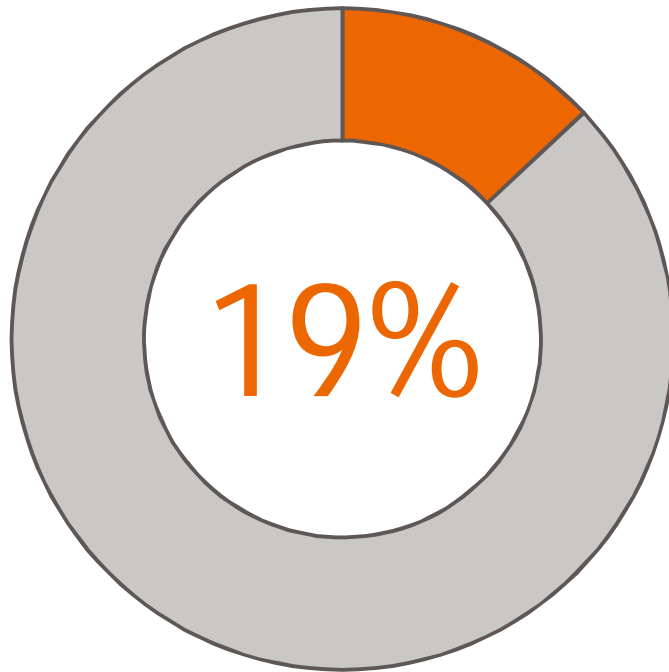
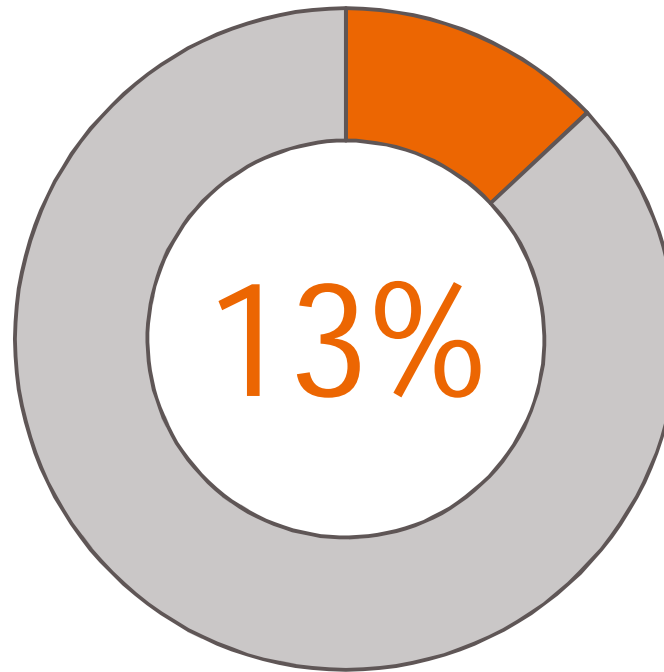
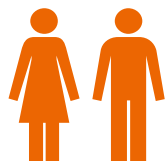


Dynamics of Healthcare Market in China

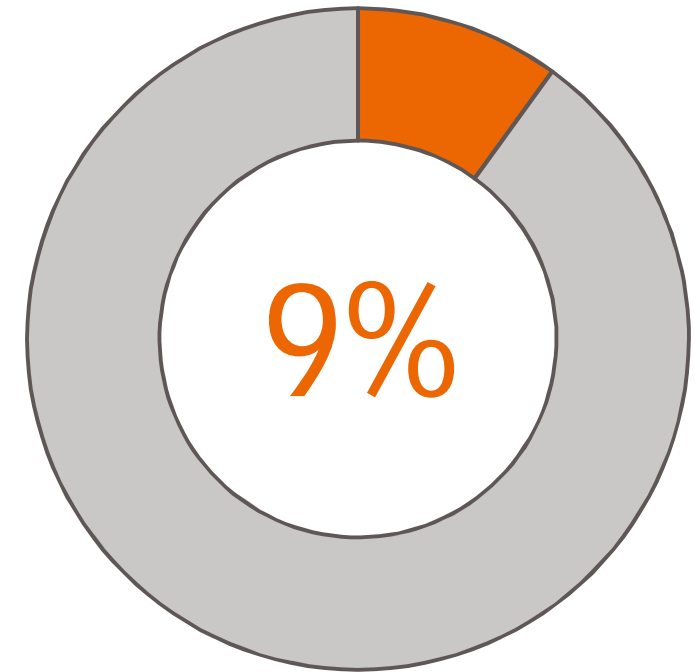
There is large space for further growth in China's MedTech market



of global population



of global GDP



of global MedTech market



Fundamental demand drivers in China remain very strong



Inpatient volume increase YoY
across all hospitals



of rural population provided with
critical disease insurance



Prevalence of diabetes –
higher than in the U.S.



Cancer incidence per year
~25% of global cancer burden

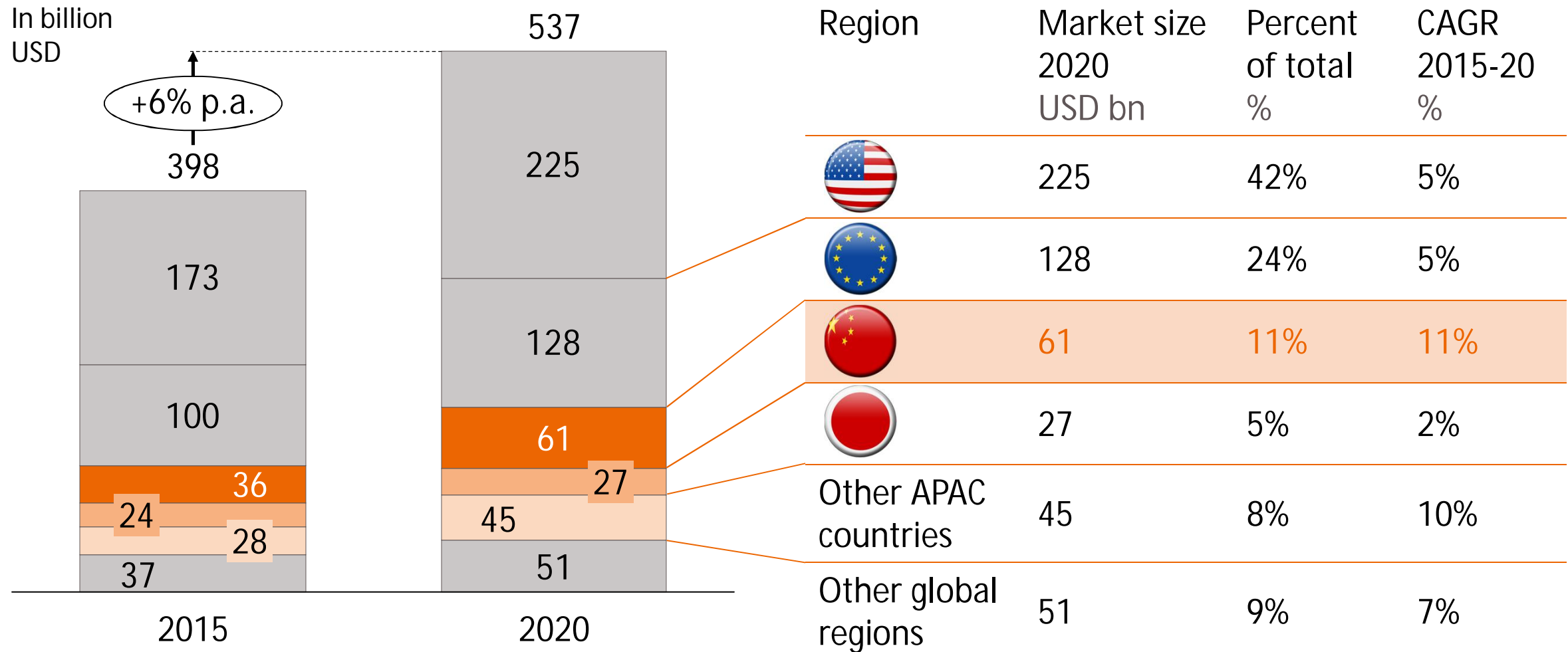


of people >50 years old
over next 5 years



of new private hospitals
opened in past 2 years

China's MedTech market is expected to grow by 11% p.a. until 2020

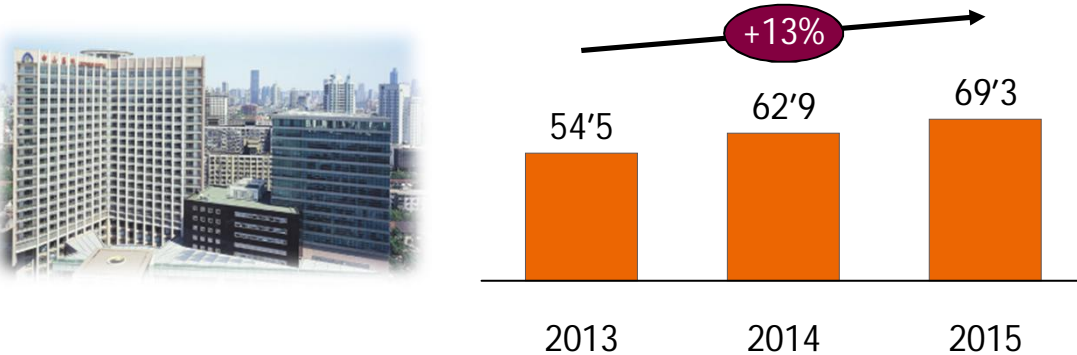


Patient flow patterns are gradually changing

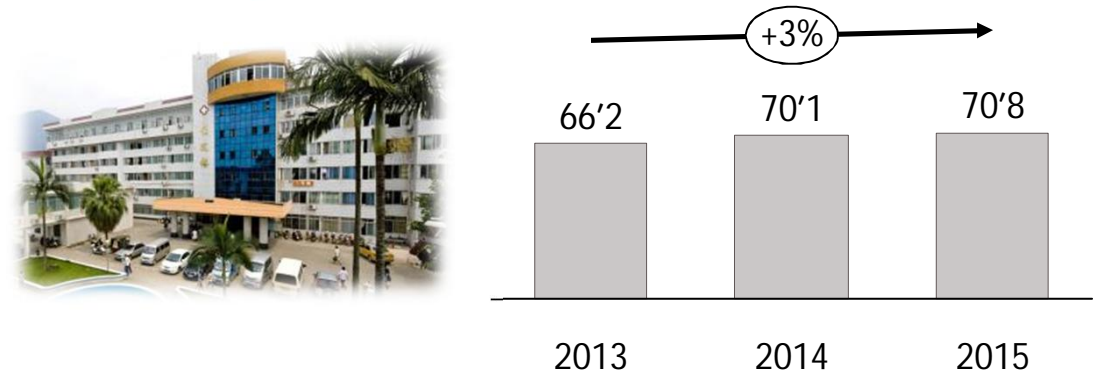
- most significant change is the rise of private hospitals

Hospital inpatient flow in China, in million patients

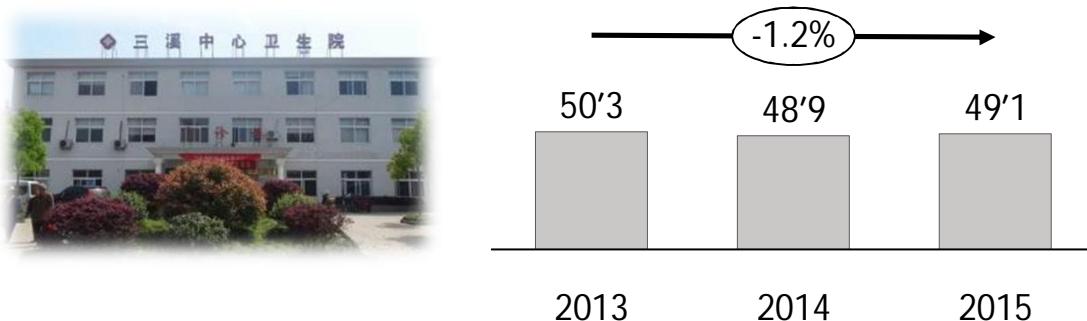
Class III hospitals



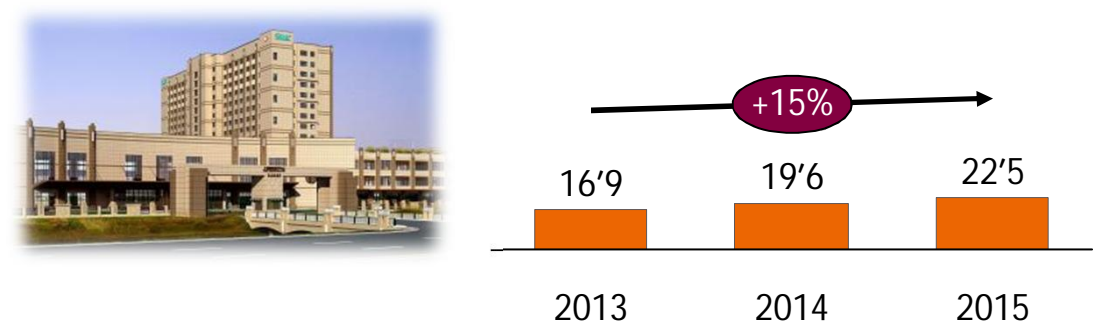
Class II hospitals



Class I / Class 0



Private hospitals



Changes in China's market are requiring our customers to increase outcomes while decreasing costs

Clinical



Extend
Clinical Capabilities



Improve
Quality of Care



Standardize
Care

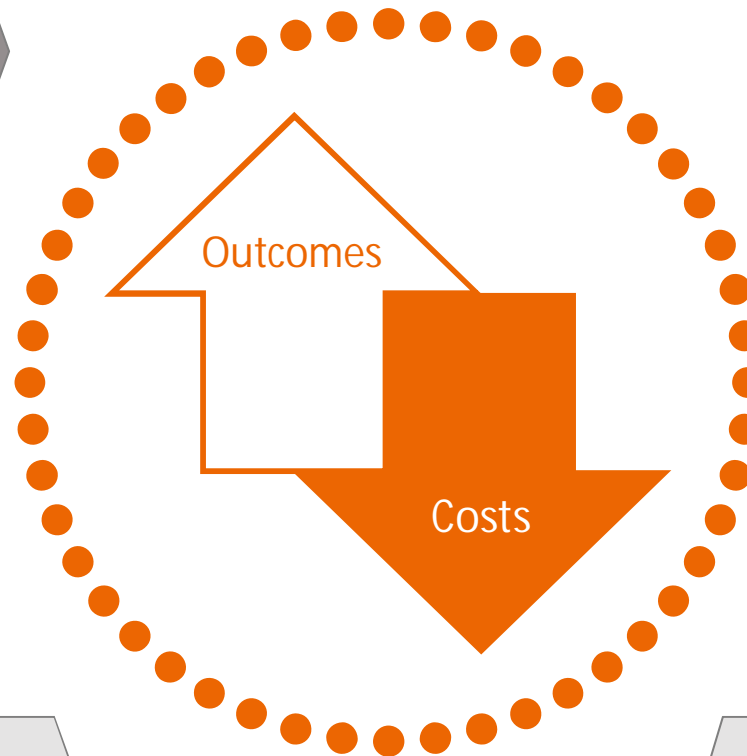
Operational



Increase
Efficiency



Attract, Retain,
Develop Workforce



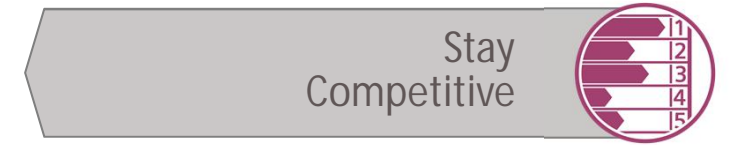
Financial



Manage
Reputation



Improve
Profitability



Stay
Competitive



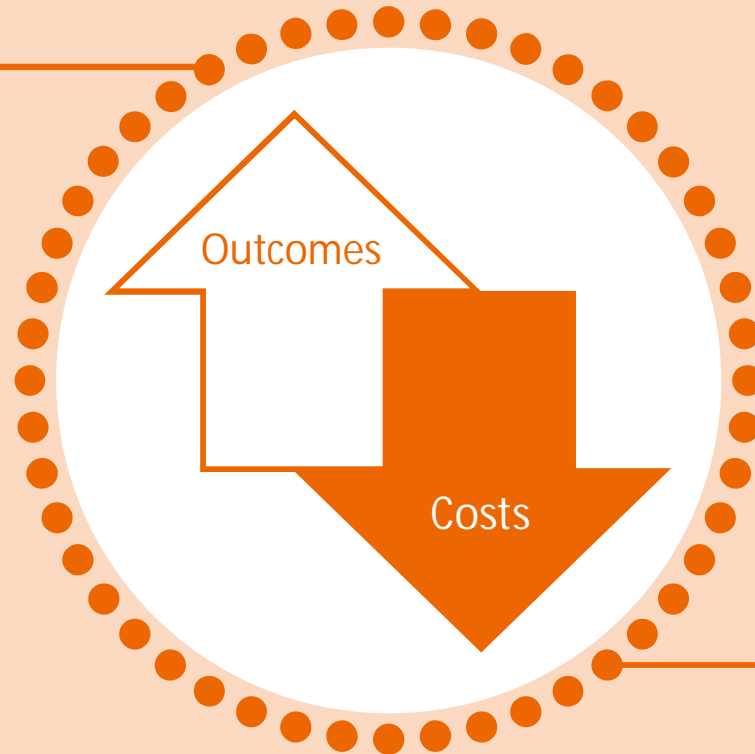
Reduce Risk &
Act Compliant



Balance Fix
vs. Variables

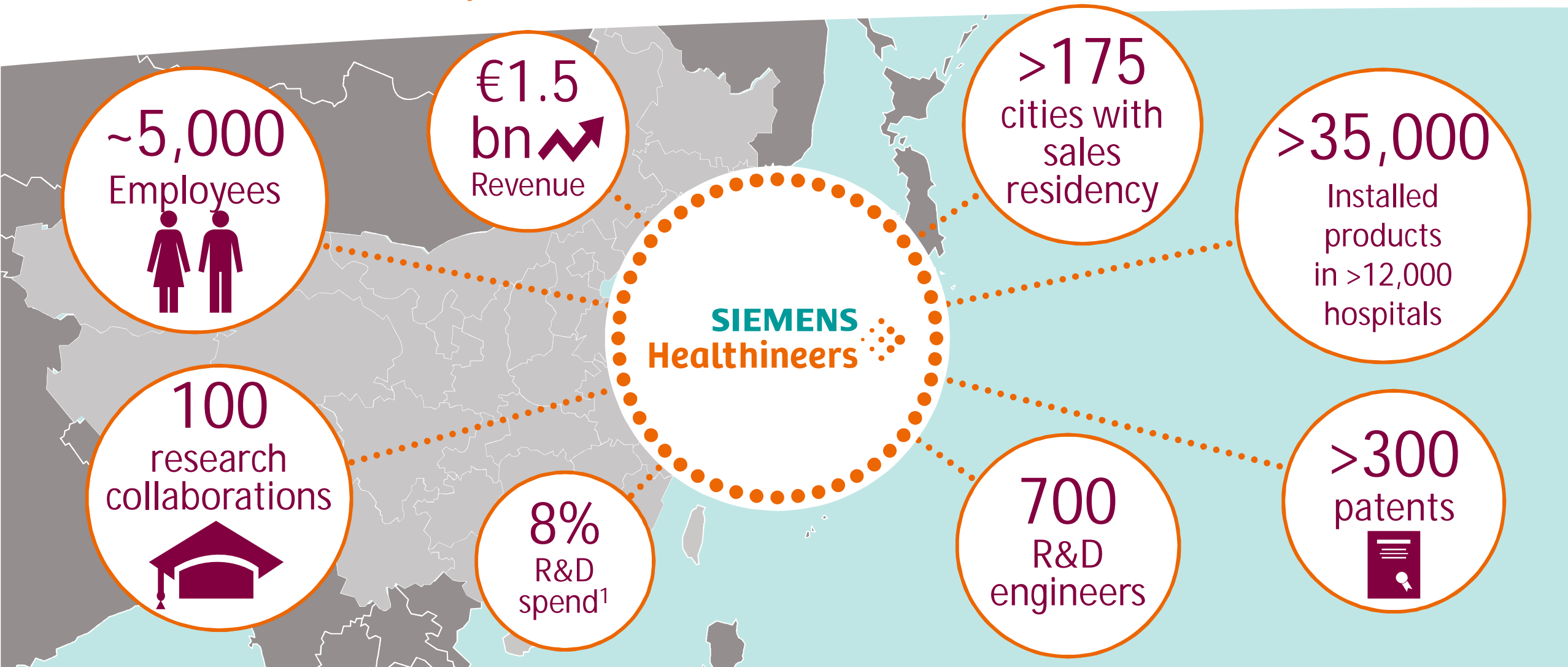
Our focus is to enable our customers to achieve better outcomes at lower costs

Enabling
better outcomes

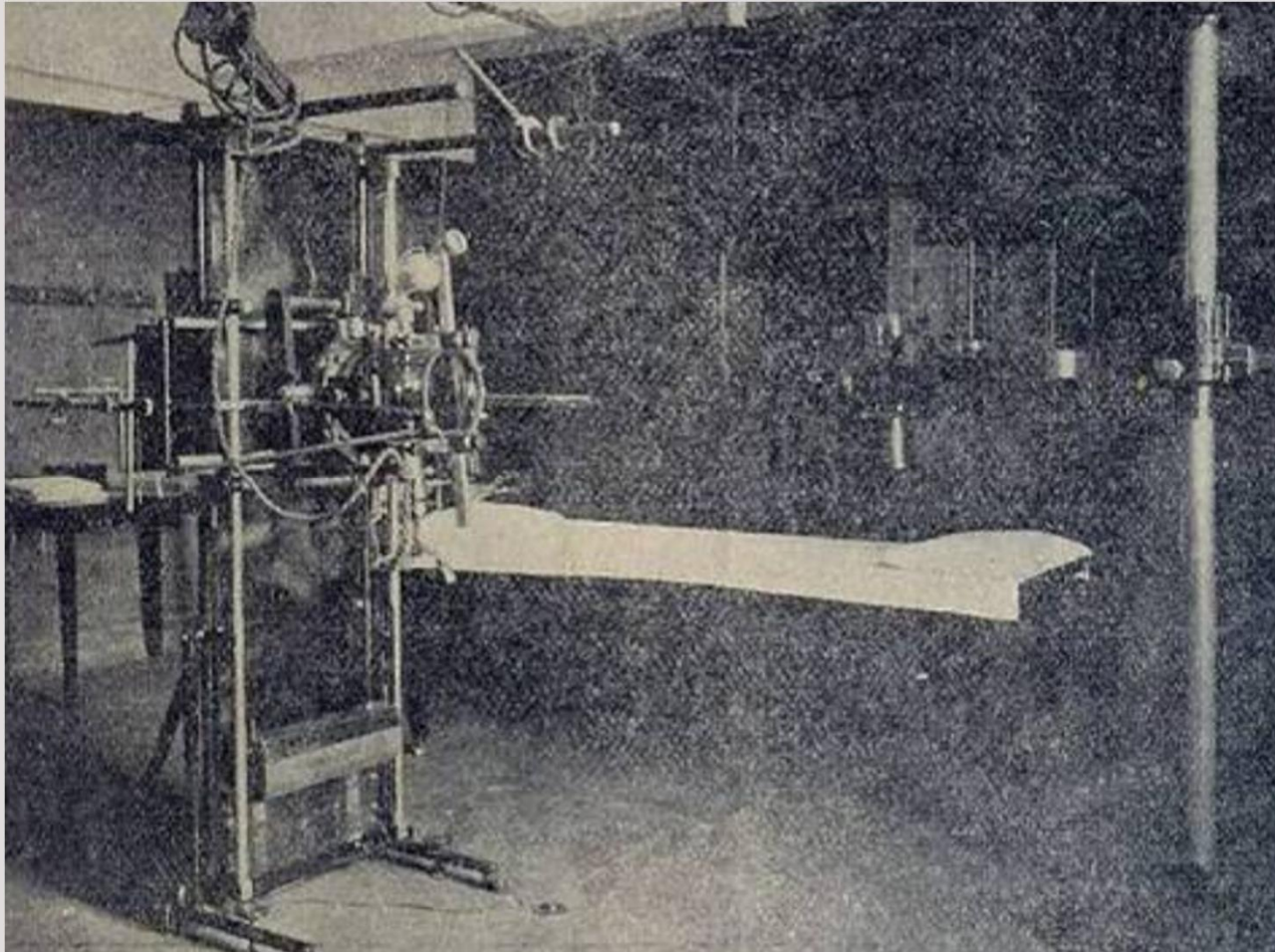


at
lower costs

Siemens is offering expertise and resources for our customers' specific needs in China



As a pioneer in innovative healthcare, we have contributed latest innovations to China since more than a century



1899

Siemens
1st X-ray
system
in China

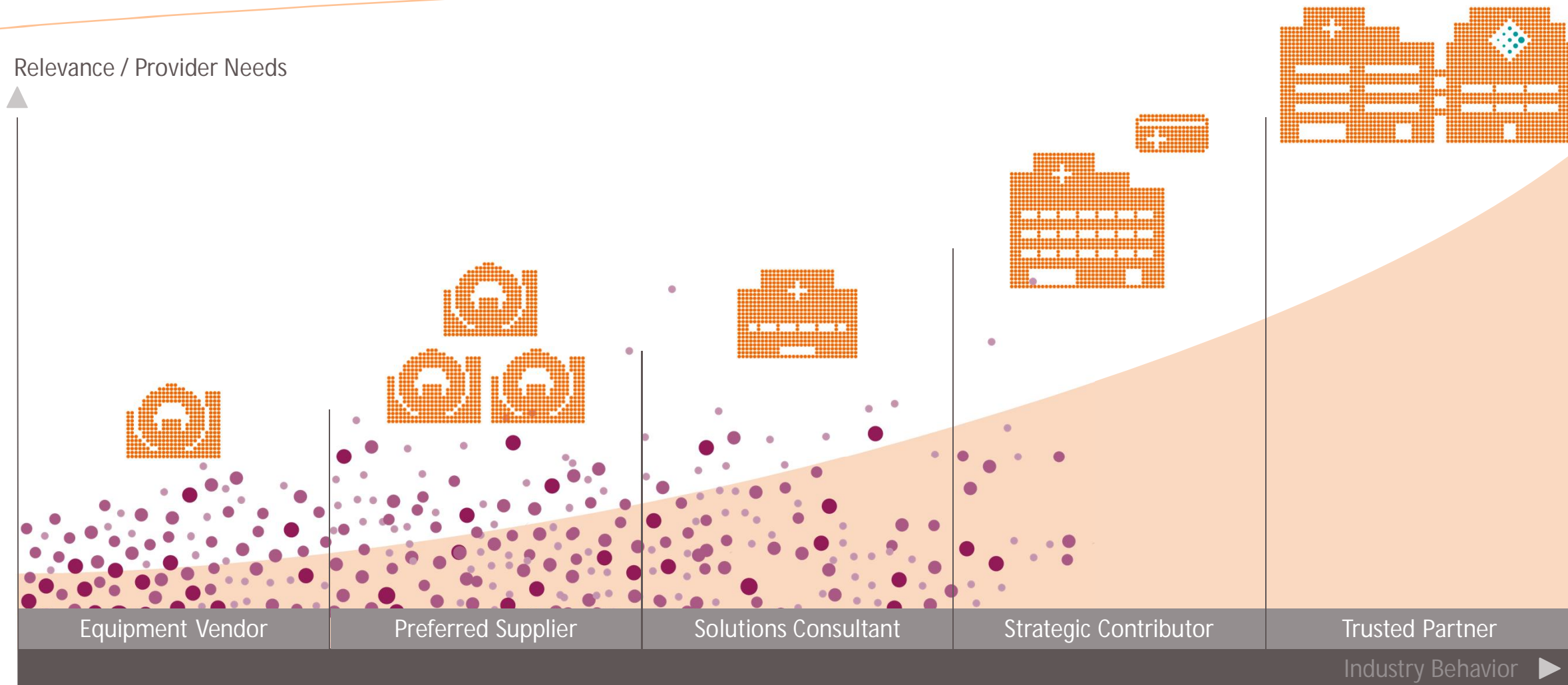
R&D and production for all Siemens Healthcare entry level products is located in China



>50% of our global CTs from China
>25% of our global MRs from China



We understand that our customers expect us to evolve from a simple product vendor to a trusted partner



Now's our time
to inspire
the future of healthcare
together

Engineering success.
Pioneering healthcare.