



INFORMATION FOR GROWTH

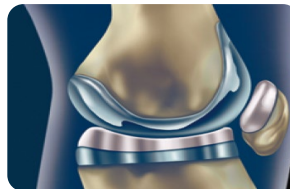
www.avicenne.com

Strategic Market Research & Transaction Services for the Medical Devices industry

Avicenne Medical company profile



August 2024



CONTACT

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CONTACT

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A diversified service offering

Based on 30 years' experience in Medical Devices

Our services

Transaction Services

Strategic Market Research

Vendor Due Diligence	Strategic & Commercial Due Diligence	Management team assessment	Target research & Build up	Customized Strategic research	Key Opinion Leaders surveys
Sizing and market dynamics	Formal Due Diligence based upon:	Strengths & Weaknesses of management team	Screening & Identification of potential targets	Diversification	Key Opinion Leaders' usage & preferences for orthopedic products
Detailed market analysis and positioning of the company	interviewing industry experts & competitors	Identification of suitable candidates to strengthen Management capabilities	Targets Assessment	Distributor search	Survey for opportunities & risks of launching new products
Management interviews	Product portfolio assessment		Analysis of the risks, complications and obstacles	Geographic expansion	
Company differentiation & keys to growing market share	Customer portfolio analysis		Final selection of the appropriate targets	New Product assessment & launch	Company reputation: survey among surgeons
Business Plan	Manufacturing organization assessment & site visits		Introduction & Initial discussions	Worldwide Market shares tracking for emerging products	
	Routes to create value				

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Scope

Covering the main end-user segments

A US\$50B Market

Hip



Robotics & Navigation



Extremities
Trauma & Shoulder



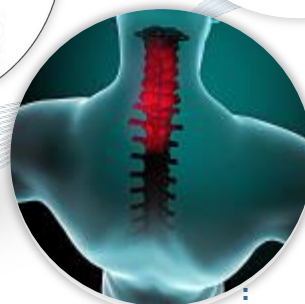
Biomaterials & Raw-materials



Instruments,
Cutting tools,
Cases & trays,
Dental implants



Spine



Knee



CONTACT

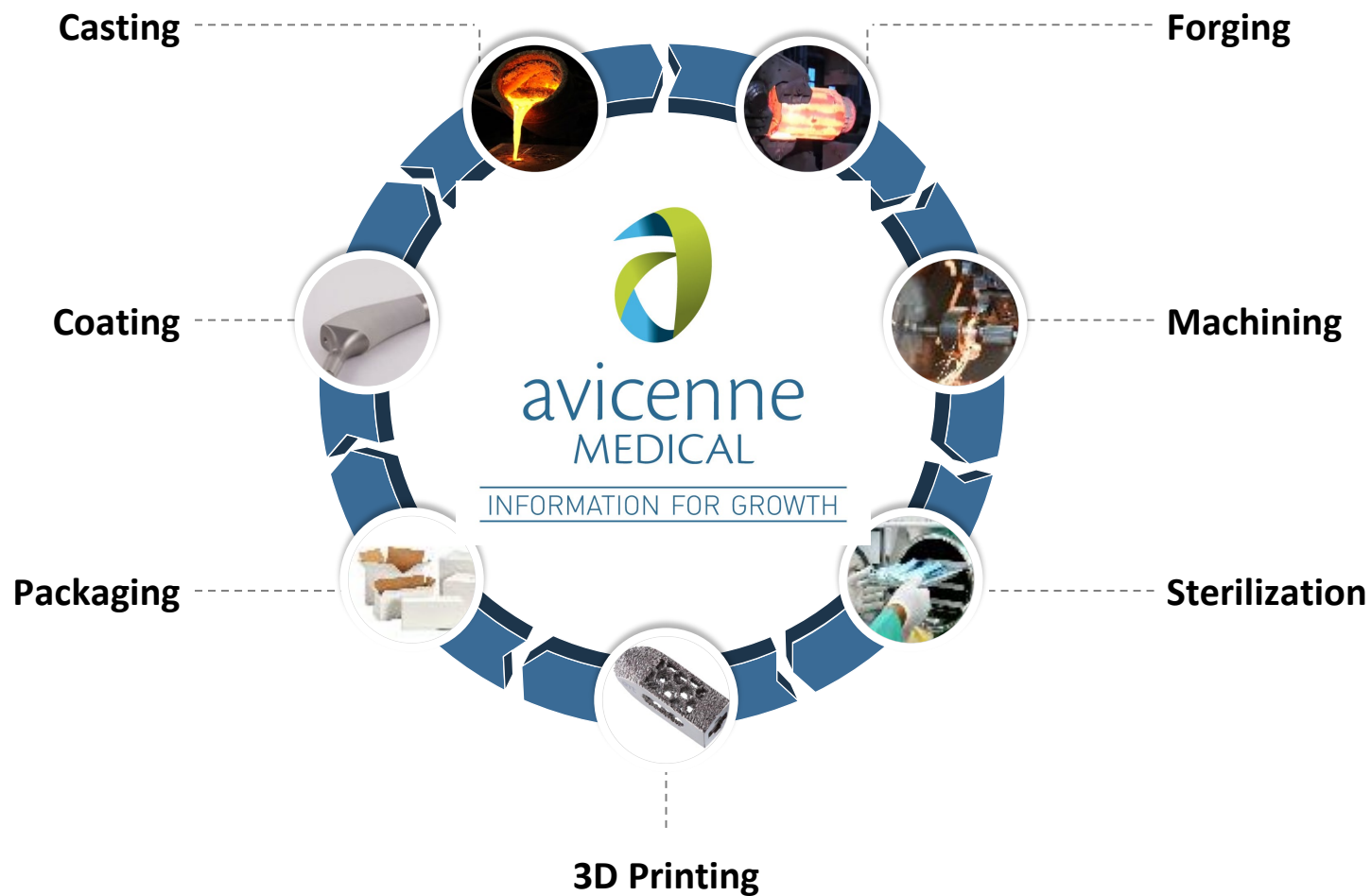
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Scope

Covering of the main contract manufacturing services

A US\$10B Market



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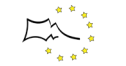
Our history: Avicenne has been involved in most of the major deals in the medical devices Industry

Strategic expertise in due diligence and build-up through acquisition, with a long track record of successful transactions for our clients.



AVICENNE track record

Medical device end-user market: Avicenne's long experience in due diligence and acquisitions in major European and US transactions

	End-user market				End-user market
	Orthopedics			Spine	Dental, Cardio, Neuro, Arthro, ENT & others
	Hip & Knee	Trauma & Extremities	Biologics	Fusion & non-fusion	
Avicenne presence	✓	✓	✓	✓	✓
Market size (2023)	US\$40 bn			US\$10 bn	US\$100+ bn
AVICENNE deal references	        	   	    	   	     
1992-2023 number of deals carried out by AVICENNE	37	28	12	27	18
Targeted products	 Hip  Knee	 Gamma nail  Plate & screws  Shoulder	 Cement  Spacer  Bone Grafts  Allograft  Balloons	 Screws & rods  Cervical plate  Cages  Disk prosthesis	 Implants & abutments  Arthroscope  Stent

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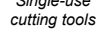
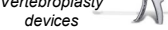
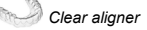
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AVICENNE track record

Medical devices contract manufacturing market: Avicenne's long experience in due diligence and acquisitions in major European and US transactions

Contract manufacturing market: implants, instruments & biologics

Manufacturing market

	Orthopedics			Spine	Dental, Cardio, Neuro, Arthro, ENT & others
	Hip & Knee	Trauma & Extremities	Biologics	Fusion & non-fusion	
Avicenne presence	✓	✓	✓	✓	✓
Market size (2023)	US\$8 bn			US\$2 bn	US\$20+ bn
AVICENNE deal references	     	   	   	    	      
1992-2023 deals carried out by AVICENNE	38	24	10	35	22
Targeted products & services	 implants  Robotics  Ceramics  Cases & Trays  Instruments  Plate & screws  Single-use cutting tools	 Spacer  Bone Grafts  Vertebroplasty devices  Balloons	 Screws, plates  Rods  Cages	 Implants & abutments  Hand & Foot prosthesis  Arthro devices  Cardio, ENT, general surgery instruments  Clear aligner	

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Avicenne has a long track record of successful acquisitions on behalf of its clients



FH ORTHO GROUP

was acquired by

OLYMPUS

Avicenne advised
the Buyer

November 2020  



TECOMET

was sold by

CHARLES BANK

Avicenne advised
the Vendor

April 2013 



**DEMETRA
TECRES-OSARTIS**

was acquired by

ASTORG

Avicenne advised
the Buyer

July 2021   



INTECH Medical

was acquired by

EURAZEO

Avicenne advised
the Buyer

June 2017  



LIMA

was acquired by

ARDIAN

Avicenne advised
the Buyer

September 2012  



Amplitude

was acquired by

APAX

Avicenne advised
the Buyer

April 2011  



MARLE

was acquired by

CARLYLE

Avicenne advised
the Buyer for build-up

April 2009  



MENIX GROUP

was acquired by

KEENSIGHT Capital

Avicenne advised
the Buyer

April 2014  

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Our team

Foundation of the company 1992

Orthopedics

Main activity

Headquarters

Paris



Linkedin profile:



Ali MADANI

30 years with Avicenne
Dauphine University: MBA Technology & Innovation, Masters in Electrical & Electronics Engineering



Christophe PILLOT

29 years with Avicenne
Dauphine University: MBA Technology & Innovation



Jean-Philippe SALVAT

27 years with Avicenne
Masters in New materials & technology



Mike SANDERS

10 years with Avicenne
Delaware University: BS in Chemistry

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Strategic & Commercial Due Diligence (SDD & CDD) examples

Deal	Date	Area	Mission	Details
DEMETRA   Worldwide Biologics leader	2021	Europe USA Asia  	SDD for the buyer ASTORG	- Product portfolio assessment for combined AAP biomaterials & TECRES - Size and forecasts in the global orthopedics cement & spacer market - Dynamics & trends of 1-step Vs. 2-step surgeries, plus forecasts - Spacers used: molded vs. preformed & Antibiotic usage for preformed spacers - Segmentation, sizing and dynamics of vertebroplasty cements & instruments - Strengths and weaknesses of each company - Cement & Spacer growth drivers & limiters in the USA & Europe: infections, usage of preformed vs handmade-molded and 2-stage procedures, drivers of cement usage: revision, cemented and hybrid - Value creation: new products to launch, new sales area, M&A targets - Business Plan and forecasts
SPHINX TOOLS Main European Cutting Tools player	2022	Europe 	CDD for the buyer SANDVIK	- Orthopedic instrument segmentation & assessment: usage, number of pieces, price, weight, life cycle - Cutting tools & consumables for hip, knee, spine, trauma, characteristics - Cutting tools & consumables supply chain & distribution channels - Regulatory aspects and certification analysis: legacy & new products - Single-use trend - Cutting tool player strategic position analysis and business drivers & limiters - Risks of sourcing products in Low Labor Cost countries - Market by product and by player and forecasts by 2026 - Value creation: New products to launch, new sales areas, M&A targets - SWOT analysis, Strategic and technological risks, business Plan and forecasts
LIMA  Large European challenger	2012	Europe USA, Australia  	SDD for the buyer Ardian	- Product portfolio assessment - Competitive advantages of the company in Italy, Germany, Spain, USA Australia, South Korea and Japan in terms of products, market share, image - Analysis of the company's distribution channels - Manufacturing organization assessment - New products, Business Plan and forecasts - Analysis of the company's management capabilities to sustain growth - Support in finding the new company CEO - R&D projects pipeline for the next 5 years - Working Capital benchmarking - Management case discussions & restatements by segment - Profitability assumptions and analysis - Report and Q&A for debt suppliers

Strategic & Commercial Due Diligence (SDD & CDD) examples

Deal	Date	Area	Mission	Details
IN'TECH  Worldwide leader in spine instruments, 66% of its sales generated in the US	2017	USA Europe Asia  	SDD for the buyer EURAZEO	- Market sizing and dynamics of customized instruments - Instruments life cycle demand, drivers & limiters - Customized & adapted product portfolio analysis - OEMs' manufacturing strategies & Contract manufacturing price pressure - OEMs' relationships with their suppliers - Criteria for choosing a CMO - Manufacturing organization analysis, Capex analysis, Regulatory & Quality department assessment - Routes to diversification, potential M&A targets & upsides - Technological & strategic risks, competitive risks and Business Plan analysis - Investment rationale, opportunities & risks
AMPLITUDE Top Challenger with strong export Knee, hip, extremities 	2011	Europe USA  	SDD for the buyer APAX Partners	- Product portfolio assessment - Positioning on existing markets: France, Germany, Italy, Spain, Austria,... - Geographic expansion opportunity analysis: USA & Japan - Other countries upside analysis: Brazil, Middle East, India - Distribution channel capabilities & risks: external agents Vs internal sales force - Company-surgeon relationships analysis - New products pipeline assessment - Business Plan forecasts: current products, new opportunities and build-up scenarios - Opportunities & risks of acquisition
TECOMET  Creation of the worldwide leader in Orthopedic Contract Manufacturing	2013	USA 	Advised the owner Charles Bank Capital	- Size and Forecast of the global orthopedic markets by country and by product - with competitors' market shares - Reimbursement procedures, trends and impact on the target business - Outsourcing strategies and trends of orthopedic companies - Segmentation, sizing and dynamics of contract manufacturing by capabilities + the market share details of the top 20 contract manufacturers - Risks and opportunities of relocating implant manufacturing to BRIC countries - Rating OEMs' criteria in choosing their Contract Manufacturers - Understanding company differentiation & keys to growing market share - Strategic & operational recommendations: ways to maximize value

Examples of Strategic market research, diversification, market share tracking and acquisition target assessment

Deal	Date	Area	Mission	Details
LSI Group Strategic advice for entering orthopedics	 2011	 	Strategic advice for diversifying in orthopedics. Goal: reach US\$100 M in revenues in 5 years	- Analysis of Orthopedics contract manufacturing by segment: forging, casting, machining, coating, etc.. - Drivers and limiters for each segment and focus on several opportunities - Analysis of the dental implants market worldwide - Acquisition opportunities analysis in Europe and the USA - Business Plan scenarios: analysis & restatements - Road map for the next 5 years
Several projects (Confidential) Identification acquisition targets	2014 - 2022	  	Find & assess appropriate targets for acquisition, strategic analysis of risks and opportunities	- Selection of 10 to 20 acquisition targets with defined criteria: - Serving the Orthopedics OEMs & CMOs in various areas - Capabilities in innovation with strong R&D and quality departments - Prototype, metrology, testing, machining, cleanroom class III, packaging, competencies - Financial perimeter: US\$10 M – US\$150 M revenues, level of profitability, etc. - Analysis of the risks, complications and obstacles - Final selection of the appropriate targets - Opening channels of communication with the targets
Medtronic Market shares tracking for 50 spine products	 Over a 4 years period		Market share tracking for 50 emerging products launched by competitors	- Quarterly market shares tracking in 14 European countries for different spine products - Perimeter: Stabilization, Dynamics, Orthobiologics & Vertebroplasty with 13 sub-segments in detail - Tracking of devices sold, by unit & value - Assessment of players' product portfolio - Forecasts and trends to identify the future high growth products

Examples of customized client projects

Strategic market research & build-up

- 🕒 Building a **diversification strategy** for an aerospace group entering the orthopedics contract manufacturing market: target US\$100 M in 5 years
- 🕒 **Search for distributors** for a variety of orthopaedic products: Europe, USA, China, Japan, Australia
- 🕒 Several **build-up & acquisition target researches** for orthopedic challengers and contract manufacturers
- 🕒 Strategy for **market share growth and build-up** for the leading European Orthopedics contract manufacturers
- 🕒 **Market shares tracking** for the sub-segments of the Spine market (tracking > 50 products) for a major orthopedic leader
- 🕒 Routes to growth for a European **coating supplier**
- 🕒 Identifying growth opportunities for a **bone graft** market leader
- 🕒 Research on **Navigation, Robotics & Devices**, worldwide market for knee, hip and spine
- 🕒 Study of the **raw material** needs of OEMs and CMOs in Orthopedics for a leading raw material distributor
- 🕒 **Dual mobility hip cups** growth and penetration in Europe, USA, and Japan for a Major orthopedic company
- 🕒 Advice on partner identification and **technology transfer** to a Middle East orthopedic OEM
- 🕒 Geographic expansion opportunities on the **cases & trays** segment for a leading European company

Key Opinion Leader surveys

- 🕒 **Key Opinion Leaders'** usage and preferences for certain orthopedic product designs in Germany, Spain, France and UK
- 🕒 **Surgeon survey** in USA & Europe concerning the hip dual mobility cups usage and trends
- 🕒 Opportunities & risks of **launching a new knee system** for a European challenger
- 🕒 **Cutting tool** market analysis for a leading worldwide supplier of cutting tools

Competitive & Technology monitoring

- 🕒 Value of **patient specific cutting guides** for knee joint replacements
- 🕒 **Additive Manufacturing**: the new challenge to manufacture orthopedics implants and instruments
- 🕒 Is **Robotics a game changer** for orthopedics?
- 🕒 Worldwide Orthopedic **patents watch** focused on hip, knee, trauma & orthobiologics for several companies

Our methodology

The Strategic Due Diligence Framework

Executive Summary

- Describe major findings of Due Diligence– focus on “Red Flag issues”
- Provide overview of findings for other components
- Description of analysis scope, what has been investigated, and Due Diligence focus areas
- Includes info on the sources used and interviews conducted

6 areas of assessment covered

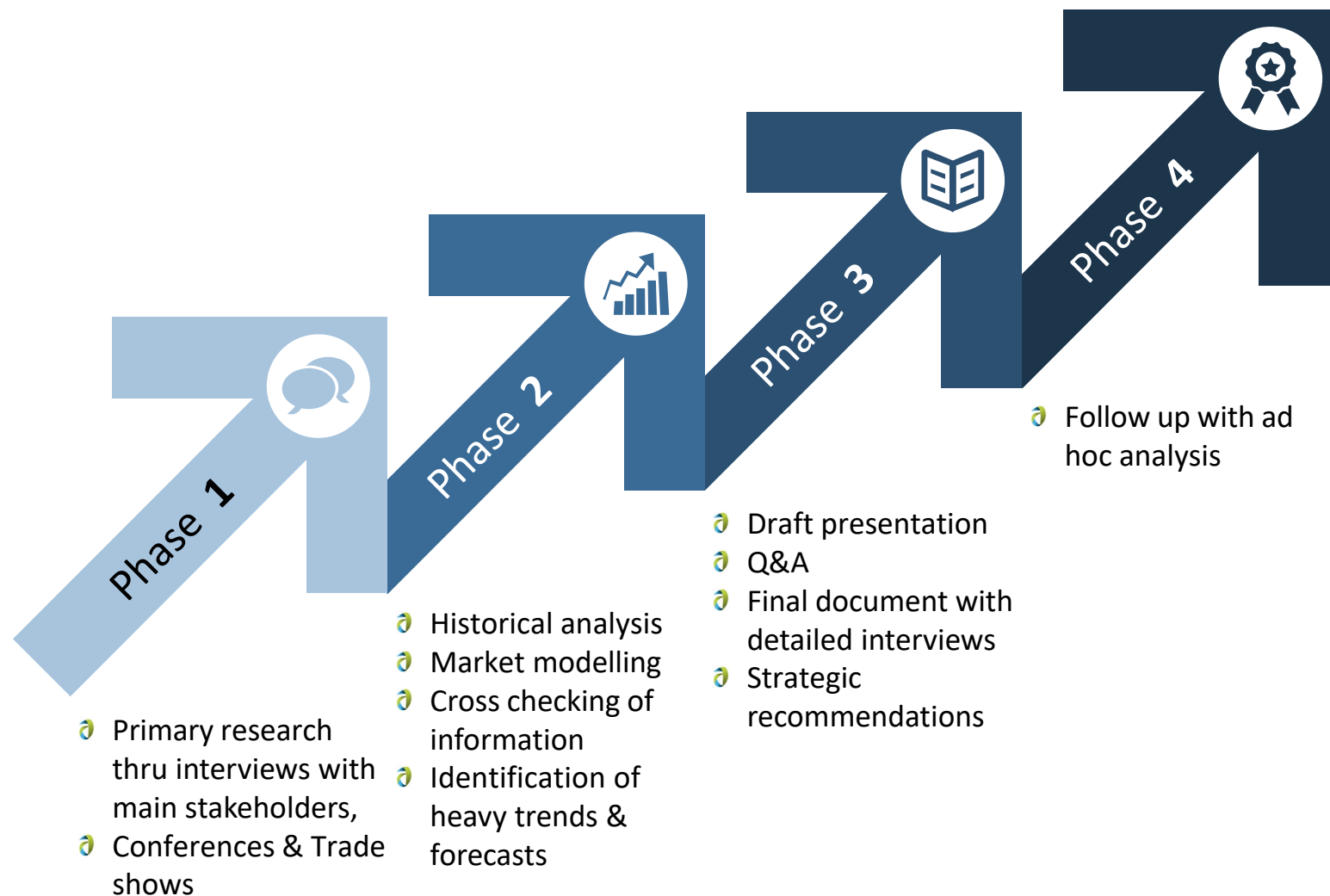
Market Analysis	Competitive Environment	Analysis of Business Model	Analysis of Investment Case	Upside & Build-up Opportunities	Exit Options
- Market analysis to form a perspective on the risks and opportunities of the acquisition - Definition of the immediate and broader market + assessment of its attractiveness	- Understanding and assessing the competitive landscape to determine the relative strength of the target company, its Unique Selling Points and sustainability - Assessment of Product portfolio and pricing strategy, customer satisfaction, Regulatory issues & likelihood of overcoming competitive threats	- Perspective on attractiveness and robustness of the business model - Analysis of past and projected performance as well as capabilities of target company	- Perspective on management’s assumptions and further improvement potentials - Assessment of management’s base case, + identification and assessment of reasonable further improvements - as well as downside risks	- Perspective on value creation potential beyond investment case assumptions – “investment case at time of exit” - Identifying and quantifying further value creation levers that could be achieved during holding period	- Perspective on exit opportunities after holding period - Assessment of industry consolidation opportunities and evaluation of potential strategic and financial buyers

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Our methodology



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Leverage high-level contacts and market tracking and modeling from 30 years of experience



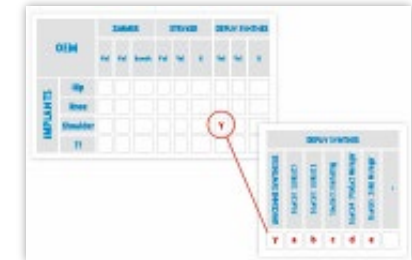
Full value chain coverage

- Entire supply chain & all players: OEMs, Contract Manufacturers, etc.
- All product types: implants, instruments, cases & trays, biologics, cements, ceramics
- All manufacturing services: forging, casting, machining, coating, packaging, sterilization

Primary research

- OEM & Contract Manufacturer direct interviews with decision makers thanks to strong links with CEOs, R&D, Marketing, Sales...
- Cross-checking of information thanks to our tried & tested operating models

Operating Models & Cross-checking of information



Secondary research

- 30+ years of historical data on the Orthopedics & Contract Manufacturing markets
- Companies & markets; continuous tracking + detailed market and financial modelling
- Highly detailed segmentation

A 360° view of Orthopedics

Worldwide coverage

Developed countries



Western Europe

BRICS countries



Other countries

Latin America, Middle East, Asia, ..

Implants

Hip

Knee

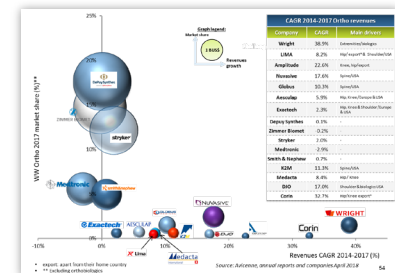
Spine

Extremities

Trauma

Contract Manufacturing

Implants Instruments Cases trays Biologics



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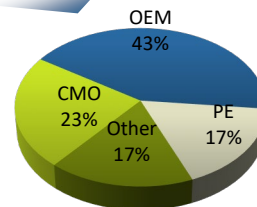
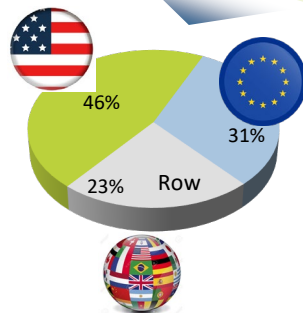
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Our methodology

A dense network built over 30 years

Our Orthopedics database:
39,000+ qualified contacts



Our Orthopedics database:
full coverage of the orthopedic top
players & their decision makers



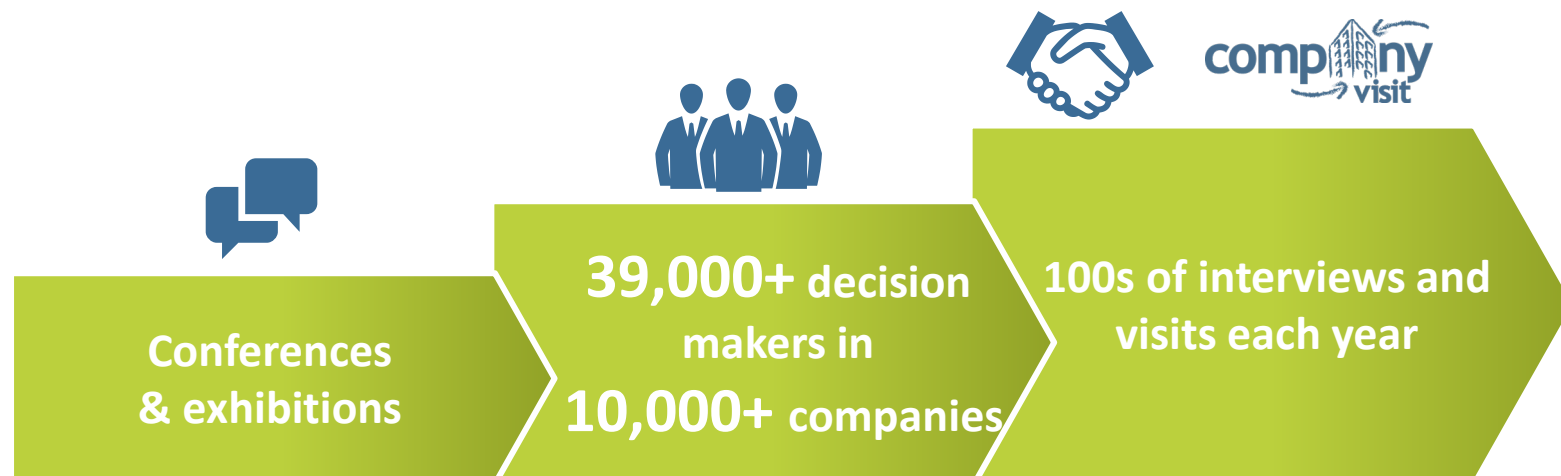
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Our methodology

Direct interviews & company visits



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Ali Madani, world-renowned medical device expert and speaker at international conference

Ali Madani is speaker, chairman and workshop moderator of 15+ international conferences worldwide each year.



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IMPLANTS conference

The international meeting on innovations & solutions for orthopedic implants & orthobiologics, chaired by Avicenne, attracts 300+ decision makers. It is both a place to take the pulse of the industry and a key networking event.

Founded and chaired
by AVICENNE since **2005**

<http://www.implants-event.com>



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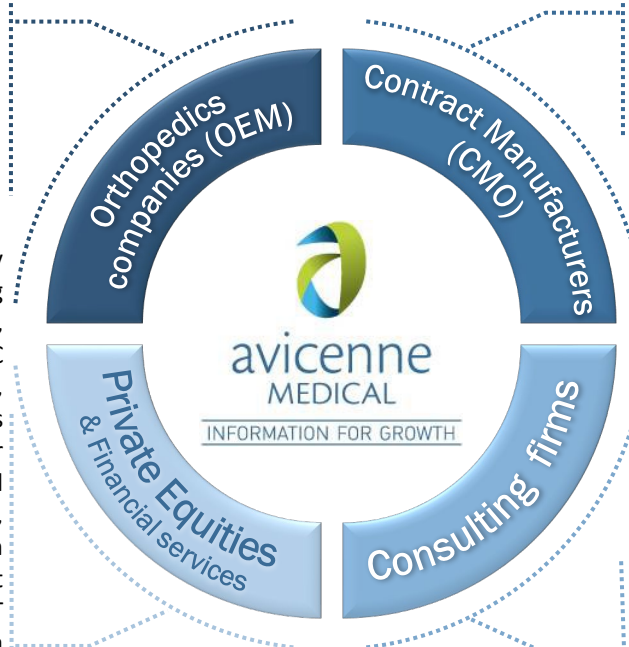
Our customers

Aesculap-B Braun, Amplitude, Aston Medical, Bioland, Biomet, Biomicron, Carl Zeiss, Ceraver, Cousin-Biotech, Dedienne, Depuy Synthes, Eurospine, Evolutis, Exactech, FH, FX Solutions, Geistlich, Help Ortho, Implanet, Implant Industries, Integra Life Sciences, Kisco International, Lepine, Lima Corporate, Mathys, Medtronic, MBA Surgical, Medacta, Meril Life Sciences, Nexis, Olympus Corporation, OST, Ortho Baltic, Orthosoft, Ossacur, Osteotech, Plus Ortho, Progenor, SEM, Seremm, Scient'x, Smith & Nephew, SME, SMI, Stryker Corp, Stryker Limerick, Stryker Spine, Spineway, SGM-Codim, Stanmore Implants, Stryker, Summit Medical, Surgical Devices Pty, Symbios, Tornier now Wright Medical, Transtructure, Transysteme, Zimmer Biomet, Wright Tornier, X'Nov...

All invest, Apax Partners, Altor Equity Partners, Alpha Associés Conseil, Astorg Partners, Apollo Global Management, Ardian, Argos Soditic, Astorg, Banque Lazard, BC Partners, BIP Investment Partners, Capza, Carlyle Group, Charterhouse, Chequers Capital, Charlesbank Capital, Clayton Dubilier & Rice, CM-CIC Investissement, CVC Capital Partners, EKKIO Capital, EMZ Partners, Essling Capital, Eurazeo PME, European Capital, Goldman Sachs, HSBC, Keensight Capital, Kinsella Group, LBO France, LGT Capital Partners, NATIXIS Partners, Novalpina Capital, Oaktree Capital, PAI Partners, Permira, Piper Jaffray, Piper Sandler, Pragma Capital (now Sparring Capital), Rothschild Five Arrows, Simuval, TechLife Capital, Tikehau, Tinicum, UI Gestion, Warburg Pincus, Zurmont Madison...

Alltec GmbH, Autocam Medical, Acnis international, Addup Solutions, Avalign Technologies, Caplugs, Ceramtec, Cetim, EOS, Element Materials, Eurocoating (now Lincotek Medical), Finetubes, Foriginal, GF Machining, Geoffroy, Integer-Greatbatch now Viant, HWG, Intech, Inomed Technology, Invibio Victrex, Ionbond, Jabil Medical, Jenoptik, Heptal, Komet, LISI Medical, Manoir Industries, Marle, Medical Group, Mediliant, Medin Technologies, Metal Craft & Riverside, Mitsui Chemicals, MW industries, Nowak, Nypro, Oerlikon, One Ortho, Orchid Orthopedic Solutions, Osartis, Paragon Medical, PolymerExpert, Projection Plasma System, RTI Surgical, Sandvik, Seabrook Medical, Seco Tools, Stainless, Straits Orthopedics, Somepic, Surgical Devices Pty, Symmetry Medical, Tecomet, TE Connectivity, Teknimed, Terolab Surface Medical, Vaccucast, VSMPO Tirus, Wichard, Willemin Macodel, Zollern,...

Arthur D. Little, AT Kearney, Alvarez et Marsal, Bain & Company, Boston Consulting Group, BC Partners, Health Advances, KPMG Strategy, LEK Consulting, McKinsey & Company, OC&C Strategy, Oliver Wyman, PWC, Roland Berger...



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Benefits of collaborating with AVICENNE

Strategic & operational consulting in the orthopedic industry since 1992 and strong relationships with key decision makers

Guaranteed Confidentiality & Strong Ethical Standards: A Core Value

Global coverage of the entire industry value chain:

- 📌 OEMs, contract manufacturers as well as surgeons, research labs, experts, etc.
- 📌 Areas:
 - 📌 North America: USA, Canada
 - 📌 Europe: France, Germany, UK, Italy, Spain, Switzerland, Belgium, Austria, The Netherlands, Portugal, Nordic Countries, Eastern Europe
 - 📌 Asia Pacific: Japan, Australia, South Korea
 - 📌 Emerging Markets: Brazil, Russia, India, China, Latin America, Middle East, Africa

Clear methodology, results and recommendations

CONTACT

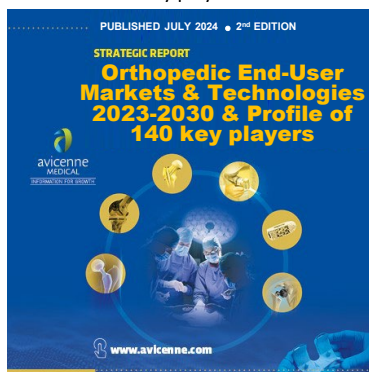
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AVICENNE's off the shelf market reports

Orthopedic End-User Markets & Technologies 2023-2030: Hip, Knee, Spine, Trauma, Shoulder, Extremities and Orthobiologics & Profile of 140 key players July 2024 - 2nd edition

- Orthopedic macro environment, drivers & limiters
- 250 pages & 400+ graphs & exhibits
- Orthopedic market by region: orthopedic players' ranking & dispersion for hip, knee, spine, trauma, shoulder, extremities & orthobiologics
- Player strategies & dynamics: split by product for each player, main facilities for the Major with their core business
- 6 Majors analysis: Zimmer Biomet, Depuy Synthes, Stryker, Smith & Nephew, Medtronic, Globus-Nuvasive
- 48 US Challenger analysis: Exactech, Enovis, Arthrex, etc...
- 55 European Challenger: Aesculap, Link, Medacta, Corin, Amplitude, etc.
- 31 Asian & Latin America Challengers: Microport, United, AK Medical, Teijin Nakashima, etc..
- Profile of 140 key players in total



Available

"Worldwide Orthopedic & Spine Contract Manufacturing market report 2023-2030 & Top 100 supplier profiles" April 2024 - 13th edition

- First published in 2014
- 400 pages & 1,000+ graphs & exhibits
- OEMs' strategy for outsourcing & in-house manufacturing
- Detailed markets & sizing for:
 - Forging: hip stem, hip cup, femoral knee...
 - Casting: femoral knee, tibial knee, hip cup...
 - Hip, knee machining & finishing
 - Spine, trauma & shoulder machining & finishing
 - Instrument manufacturing
 - Cases & trays manufacturing
 - 3D printing: spine cages, hip cups,...
 - Coating: stem, cup, femoral, tibial
 - Ceramics: hip heads, hip liner
 - Cleaning & packaging...
 - Special focus on Robotics usage for orthopedics, Co-Cr alternative solutions, inflation & FX impact
- Top 100 Contract manufacturers detailed profiles



Available

"European Orthopedic Market 2021-2026" Hip, Knee & Shoulder September 2022 - 19th edition

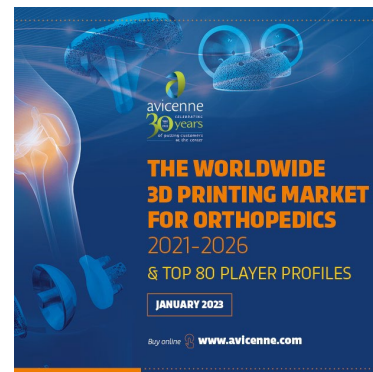
- First published in 1993
- 860 pages & 1,550+ graphs & exhibits detailing the European Market in Germany, France, Italy, Spain, UK, and other countries
- Up-dated yearly
- Hip, Knee and Shoulder
- Based on 100+ interviews
- Special focus on the worldwide orthopedic market, player dynamics and global market shares
- Analysis of the drivers & limiters of the market, price pressure and regulatory trends, MDR impact in Europe. Comprehensive analysis of the key companies
- Impact of COVID in orthopedic markets: 2020, 2021 and beyond



Available

"Worldwide 3D printing for orthopedics 2021-2026 & player profiles" January 2023 - 2nd edition

- First published in 2018 – January 2023, 2nd edition
- Market for 3D Printing for Orthopedics and forecasts in 2026
- Market for hip cups, tibial knees, glenoid shoulders, spine cages and other products made by 3D printing
- Based on 50+ interviews of:
 - 3D printing machine suppliers
 - Contract Manufacturer leaders in 3D printing
 - Orthopedic companies operating in 3D printing
 - Other Contract Manufacturers operating in 3D printing
- Top 80 detailed players



Available

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