



# This is GE Healthcare



# A LEADING GLOBAL MEDTECH AND DIAGNOSTICS INNOVATOR

## KEY NUMBERS

**\$16.7B** Revenue in 2019

**~50K** Employees worldwide

**160+** Countries

**\$1B+** Invested annually in cash R&D

**12K** Patents issued globally

## DIFFERENTIATORS

**100+ year legacy of innovation**

- More than \$1B in cash R&D invested annually
- 12K patents issued
- Strong PET tracer and contrast agent pipeline

**Global scale with world's largest Installed Base (IB)**

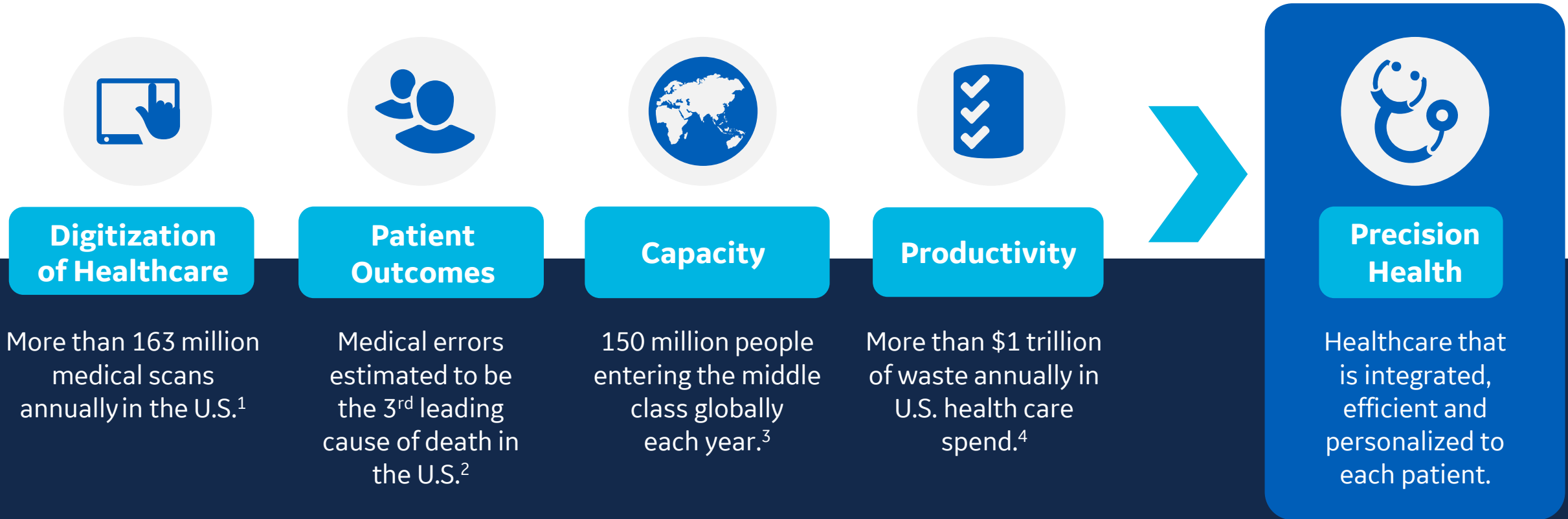
- 4M+ Installed Base and 2B+ exams per year
- 3 patients using contrast media per second
- ~50K employees in 160+ countries

**Ability to integrate data for insights**

- 200+ digital and analytics-based apps
- More than 230B patient images stored



# MAJOR TRENDS IN HEALTHCARE SHAPING MARKET NEEDS



1 CT market Outlook Report, 2018; Rohman, JAMA, 2018

2 Makary and Daniel, BMJ, 2016

3 Kharas, Brookings Institution, 2017

4 O'Neill and Scheinker, HealthAffairs, 2018



# FOCUSED ON SOLUTIONS FOR DIAGNOSIS, TREATMENT, AND MONITORING

## BUSINESS LINES



### Imaging

- MR
- CT
- MI
- X-Ray
- Women's Health
- Image Guided Therapies



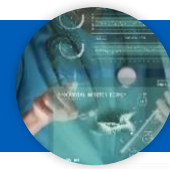
### Ultrasound

- Women's Health
- Cardiovascular
- General Radiology
- Point of Care
- Primary Care



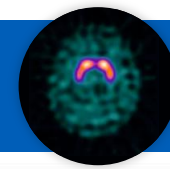
### Life Care Solutions

- Monitoring
- Anesthesia & Respiratory
- Diagnostic Cardiology
- Maternal & Infant Care
- Acute Care



### Enterprise Digital Solutions

- PACS/RIS
- VNA
- Advanced Visualization
- CVIT



### Pharmaceutical Diagnostics

- Contrast Media
- Molecular Imaging Agents
- Pharma Trial Companion Diagnostics

## Offerings

## Capabilities

← **NINE COMMERCIAL REGIONS  
ONE INTEGRATED SUPPLY CHAIN  
GLOBAL SERVICES**

**GE HEALTHCARE PARTNERS  
GE HEALTHCARE EQUIPMENT FINANCE  
EDISON™ INTELLIGENCE PLATFORM** →



# WELL POSITIONED IN LARGE, ATTRACTIVE, AND GROWING MARKETPLACES

## GLOBAL MARKETS

Size<sup>1</sup>'18

Growth '19-'22

Growth drivers



Imaging

\$19B<sup>1</sup>

3-4%



Ultrasound

\$6B<sup>1</sup>

4%



Life Care Solutions

\$6B<sup>1</sup>

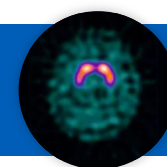
2-3%



Enterprise Digital Solutions

\$7B<sup>2</sup>

6%



Pharmaceutical Diagnostics

\$8B<sup>3</sup>

3%

- Persistent need for better care, delivered more efficiently.
- Growth of middle class & aging populations creates demand for more capacity.
- Digital and AI ready for application to healthcare problems, at scale.
- Growth in contrast use in developing markets and expanding indications of molecular imaging agents.
- Continued growth in Precision Diagnostics (e.g., cancer, Alzheimer's).

**\$47B GLOBAL MARKETPLACE (EXCLUDING SERVICES), EXPECTED TO GROW AT 3-4%<sup>4</sup>**

<sup>1</sup> Imaging, Ultrasound and LCS markets measured in equipment order \$; all others based on revenue \$; <sup>3</sup> X-Ray and MR contrast media and Nuclear Medicine (SPECT & PET)

<sup>2</sup> ESS markets include Enterprise Imaging, Advanced Visualization and Care Area IT; <sup>4</sup> Internal estimates



# WHY WE WIN AND DRIVERS OF GROWTH



## INDUSTRY-DEFINING INNOVATION

Proven technology leader with 100+ year track record of industry-defining innovations.

**100+**  
years

Track record of innovation



## WORLD'S LARGEST IB

Unmatched scale and opportunity to create value through our Installed Base. Over 8000 professionals dedicated to supporting our customers' success.

**4M+**

Installed base



## LOCAL, GLOBALLY

Established leader in every region, with a portfolio tailored to needs of fast growth markets.

**9**

Strong commercial regions



## SOLUTIONS

Ability to, with customers, deliver significant improvements in outcomes.

**\$2.6B**

Contract value of Structured Partnerships secured since 2003



## DIGITAL

Bringing AI and analytics to the practice of healthcare, powered by Edison™.

**200+**

Digital and analytics applications



# GLOBAL SCALE THAT DELIVERS ON LOCAL NEEDS



## LOCAL, GLOBALLY

A global sales force of over **5,600** sales professionals; a network of over **1,800** distributors and channel partners; and **8,000** field service engineers

## INTEGRATED SUPPLY CHAIN

**9** strong commercial regions with manufacturing sites around the world to deliver quality products and help enable a world-class experience for our customers

## INNOVATION CLOSE TO CUSTOMERS

R&D centers around the world



# LEGACY OF INDUSTRY-DEFINING INNOVATIONS FOR OUR CUSTOMERS

**1960s**

First 500-cycle, battery-powered mobile X-ray generator



**1970s**

The world's first "rotate only" Computed Tomography (CT)



**1990s**

World's first and only iso-osmolar contrast medium



**2000**

The first to combine the power of PET and CT in a single system



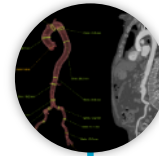
**2003**

The world's first high resolution 4D fetal Ultrasound system



**2014**

Advanced Workstation™ TAVI Analysis for comprehensive surgical workup planning



**2015**

First hospital Command Center (JHU)



**2018**

The world's first Ultrasound optimized for AI



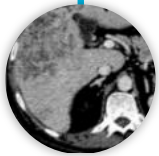
**2019**

New MR AIR™ Coils named best new radiology device



**1896**

Produces the forerunner of today's X-ray systems



**1969**

First non-ionic X-ray contrast medium



**1980s**

The world's first commercial high-field MR system



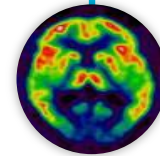
**2000**

First SPECT agent for the evaluation of clinically uncertain Parkinson's Disease



**2010**

First handheld Ultrasound



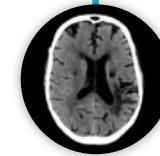
**2013**

Introduced first PET agent for colour imaging of amyloid plaque in evaluation of Alzheimer's Disease



**2016**

World's first mammo system that puts compression control in the hands of women



**2018**

First ever deep learning image recon software in CT



**2019**

FDA clearance of first on-device AI to prioritize critical chest X-Ray review



# CONTINUOUSLY INNOVATING HOW WE INNOVATE

TECHNOLOGY

SERVICES

FINANCING

PHARMACEUTICAL DIAGNOSTICS

EMERGING MARKETS

PUBLIC PRIVATE PARTNERSHIPS

ENTERPRISE SOLUTIONS

DIGITAL

CARE PATHWAYS

PRECISION HEALTH



100+ YEARS OF  
INNOVATION



NEW  
CAPABILITIES

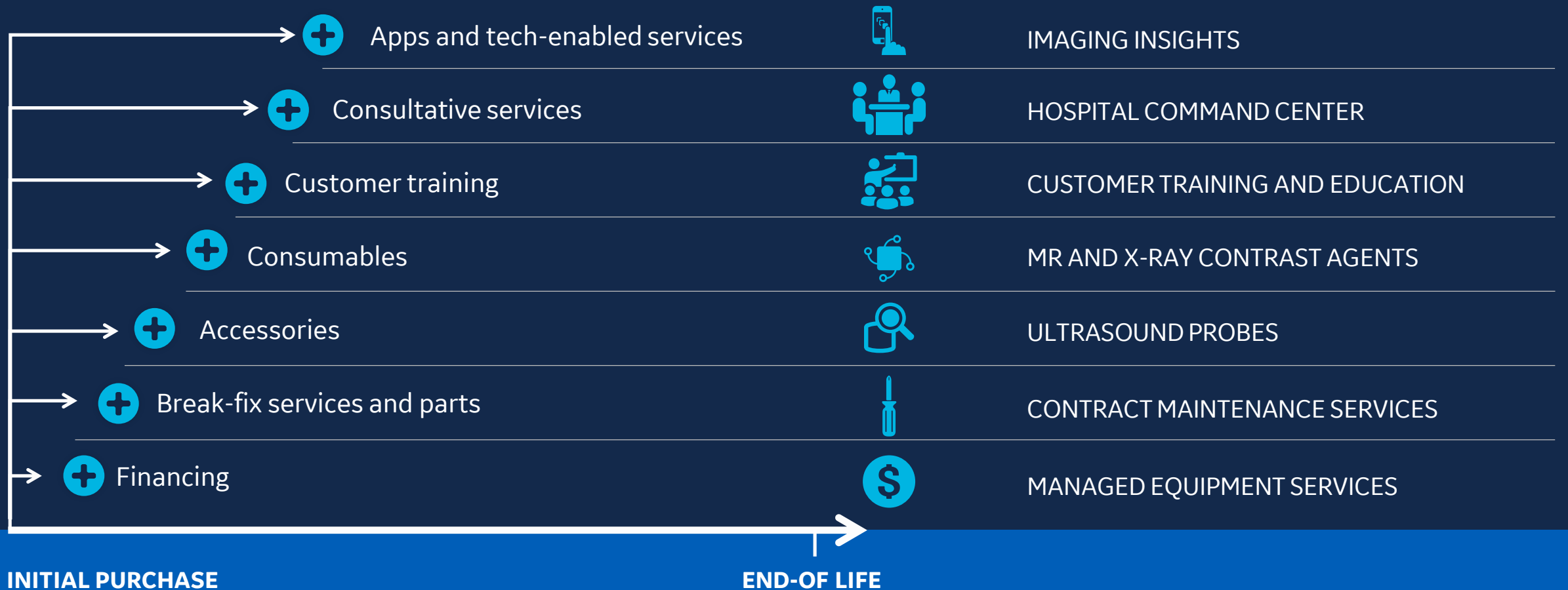


NEW  
BUSINESS  
MODELS

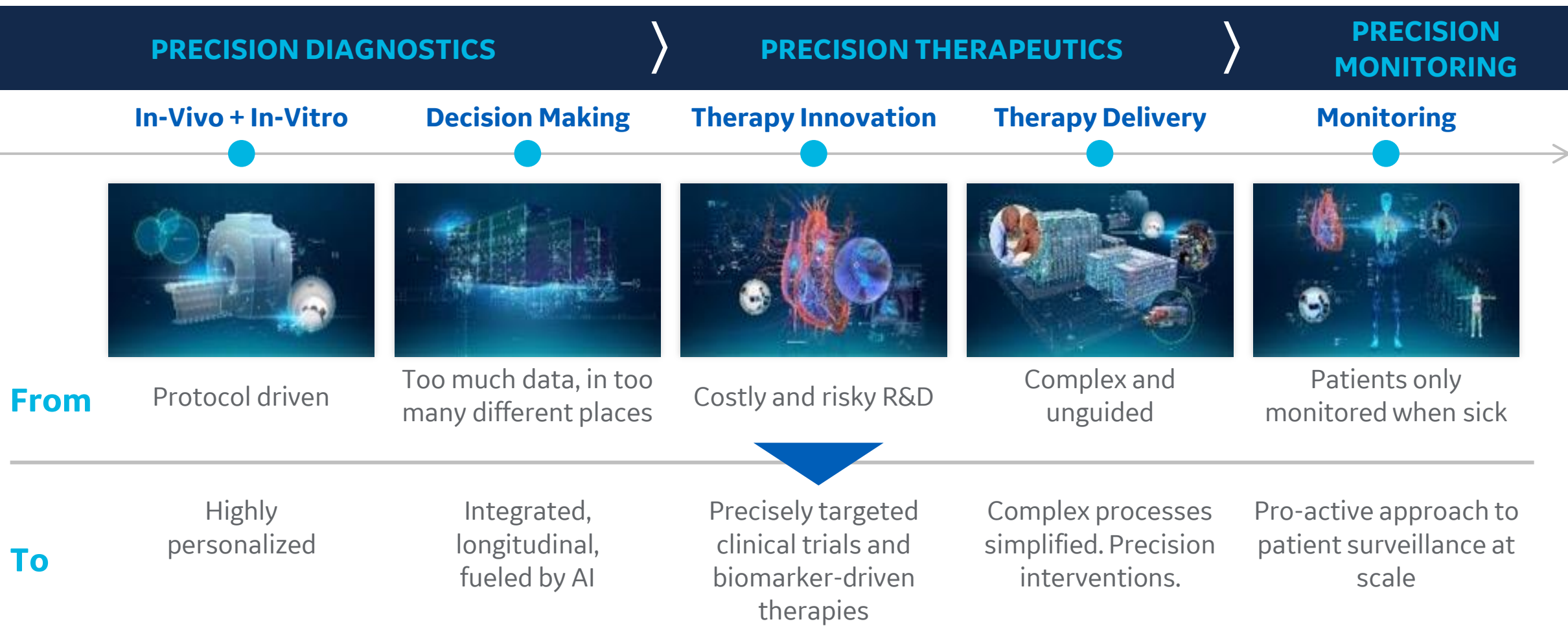


# CREATING VALUE THROUGH THE WORLD'S LARGEST INSTALLED BASE

INSTALLED BASE OF  
**4M+** SYSTEMS



# SHIFT TOWARDS **PRECISION HEALTH** OPENS SIGNIFICANT NEW AVENUES OF GROWTH FOR GE HEALTHCARE



# AWARD-WINNING INNOVATION ACROSS A BROAD PORTFOLIO IS AT THE CORE OF OUR SOLUTIONS

## COMPLETE SOLUTIONS

Industry leading technology

Healthcare Financial Services

Edison: Digital, AI and software

Local Service capability

Training

Clinical pathway expertise



### Magnetic Resonance

Minnie Award for 2019 best radiology device – AIR™ Coils



### Women's Health

Senographe Pristina: patient-assisted mammography exams



### Computed Tomography

Revolution Apex™ with TrueFidelity™ AI-enabled images



### Central Monitoring Unit

Central surveillance of cardiac telemetry patients



### Surgery

Noise reduction algorithm reduces image noise at least 30% during vascular and cardiac procedure without increase in power or dose



### Ultrasound

LOGIQ™ E10: ultra-premium radiology system with unique AI/ML imbedded technologies



# USING DIGITAL INNOVATION TO UNLOCK CAPACITY AND IMPROVE OUTCOMES

**Smart devices**  
with enhanced  
results in less  
time

**Predictive services**  
and remote fix  
capabilities to increase  
customer uptime

**Subscriptions** to  
increase access and  
align business  
model to customer  
needs

**Intelligent  
applications and  
workflows** to enable  
contextual insights and  
visualization

**Platform and  
ecosystem** to  
integrate data across  
disparate systems and  
enable analytics



# USING DIGITAL INNOVATION TO UNLOCK CAPACITY AND IMPROVE OUTCOMES

## SMART DEVICES



Voluson™ E10

## AI AND CLINICAL DECISION SUPPORT



Critical Care Suite on  
OPTIMA™ XR240amx

## OPERATIONAL EFFICIENCY



Command Center

## SUBSCRIPTION



CT Smart Subscription



**BUILT ON AN INTEGRATED PLATFORM AND ECOSYSTEM** that connects data from across devices, applies intelligence (e.g., analytics, AI) on the Edison platform, and engages 3<sup>rd</sup> party developers to build and deploy solutions to complement our offerings.



# COLLABORATING WITH PARTNERS ACROSS THE HEALTHCARE ECOSYSTEM

## CLINICAL INNOVATORS

## INDUSTRY INNOVATORS

## TECHNOLOGY INNOVATORS



# DELIVERING IN EVERY MOMENT

## Our people

Our passionate, caring people are our greatest asset.

We win as one team and seek to create a healthier world through a culture of focus, ownership and trust.

GE Healthcare people are global, diverse and dedicated, operating with the highest integrity and a lean mindset to deliver for our customers and fulfil our ambition, purpose and vision.

## An extraordinary place to work

**We care about people, quality and the way our energy helps create a healthier world.**

Our passion flows through the organization because we strive to make a life-changing difference to people. This drives the quality of what we do and the care we have for our customers and colleagues.

**We embrace challenges, differences and thinking that is bigger than us.**

We dive head-first into new experiences with open minds. Our work and inspiring people around us create a unique and challenging place where we can learn, grow and succeed every day.

**We unlock opportunities for us, our customers, and their patients.**

We're a company with big impact. Our strength and scale provides many career opportunities and the chance to see your ideas become a reality.

## Our behaviors

Act with humility and build trust

Lead with transparency

Deliver with focus and drive ownership

**...always with unyielding integrity**



# SUMMARY

✓ A leading global medtech and diagnostics innovator.

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✓ Long history of clinical innovation and we're driving the industry forward, today.

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✓ Leader in strong markets and entering faster growing adjacencies.

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✓ Near to medium term opportunities for operating margin and cash flow growth.

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✓ Proven, experienced management team and mission-driven employees.



# CONNECT WITH US



## WEBSITE

[www.gehealthcare.com](http://www.gehealthcare.com)



## NEWS & UPDATES

<https://www.gehealthcare.com/insights>



## LINKEDIN

[www.linkedin.com/company/gehealthcare](http://www.linkedin.com/company/gehealthcare)



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