



# Image-Guided Therapy

Accelerating growth through interventional platforms

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# Global leader uniquely integrating systems, software and devices in one interventional platform

## Systems



## Devices



#1 Globally

EUR 2.3 billion sales

#1 Cath lab systems

#1 Interventional cardiology

#2 Interventional neurovascular

#1 Globally

EUR 1.1 billion sales

#2 Coronary devices

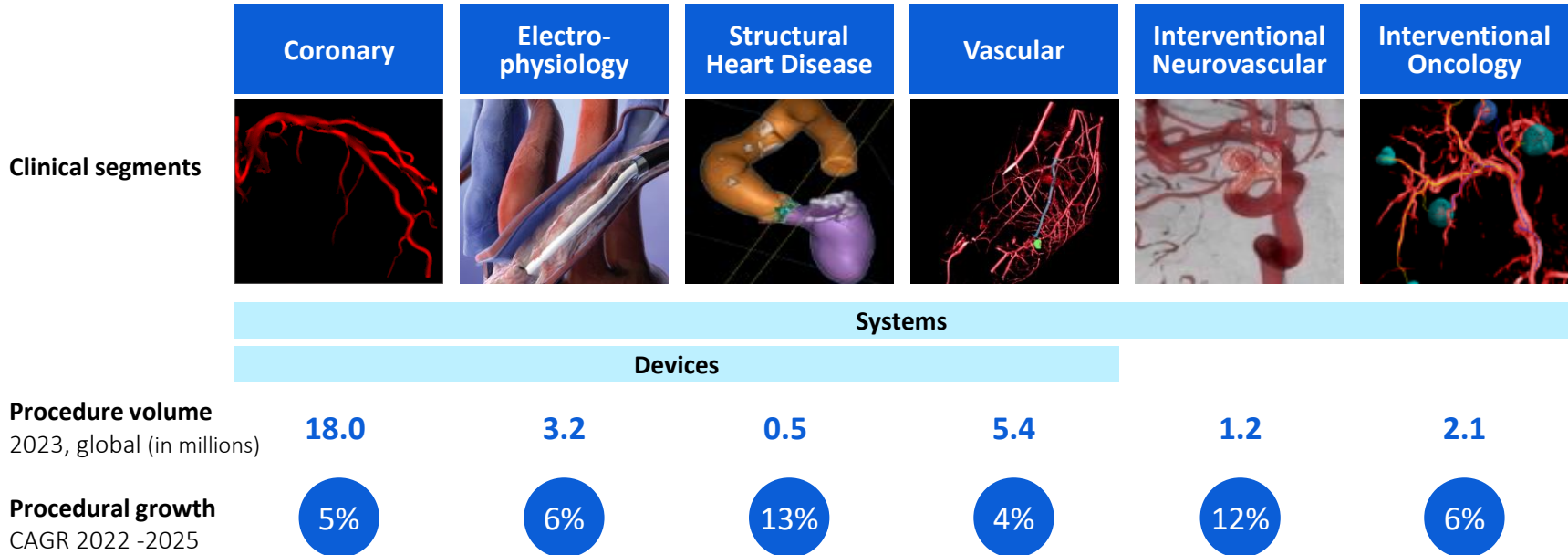
#1 Peripheral vascular devices

#1 Lead management

#1 3D Intracardiac echography

## Market leading installed base

# Serving interventional clinical segments with high growth rates



# Attractive market growth supported by clear trends

## Addressable market

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EUR **10 billion**  
in 2023

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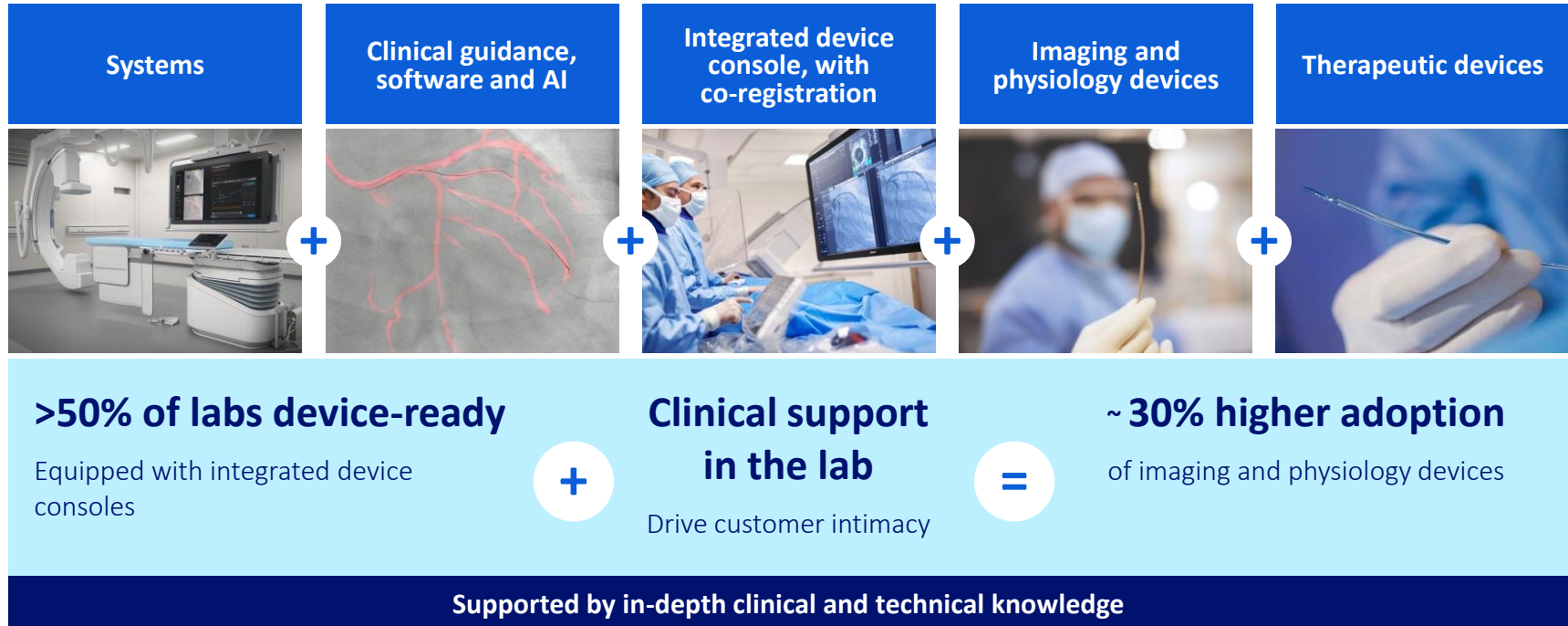
Mid to high  
single-digit  
2022 – 2025 CAGR

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## Key market trends

- Growth of minimally invasive procedures and patient volume
- Innovation to treat new and/or more complex patient pools
- Clinical and economic evidence driving guidelines and reimbursement
- Expansion through increased adoption and procedure innovation
- Emergence of new growth geographies
- Improved procedural efficiency increases access to care

# Shaping market through unique combination of systems and devices driving procedure workflow innovation, clinical adoption



# Standard setting innovation in complex clinical areas strengthens leadership position and enables growth in adjacencies

## Recent and near-term releases

Interventional Neurovascular

### **Imaging and guidance platform**

*Azurion release 3 + new software*



## Strategic relevance

Expansion into high growth clinical areas (e.g. stroke)

Structural Heart Disease

### **High-end invasive imaging**

*VeriSight Pro Intracardiac Echo*

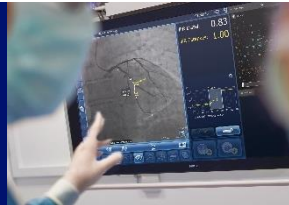


Expansion into high growth segment leveraging Ultrasound

Coronary

### **Clinical evidence generation**

*“DEFINE GPS” and “IMPROVE” clinical trials*



Propel co-registration and image-guided coronary intervention toward standard of care



# Key takeaways

- Global leader, with largest installed base
- High market growth driven by move to minimally invasive, emerging therapies
- Sole player integrating systems, software and devices offering end-to-end
- Leading procedural workflow innovation, with measurable clinical benefits in core and adjacencies
- Uniquely positioned interventional sales teams, driving deep customer intimacy



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