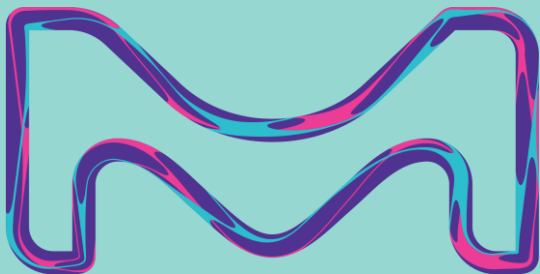


Life science

Rising to new heights

Matthias Heinzl, CEO Life Science

2nd Virtual CMD – September 9, 2021



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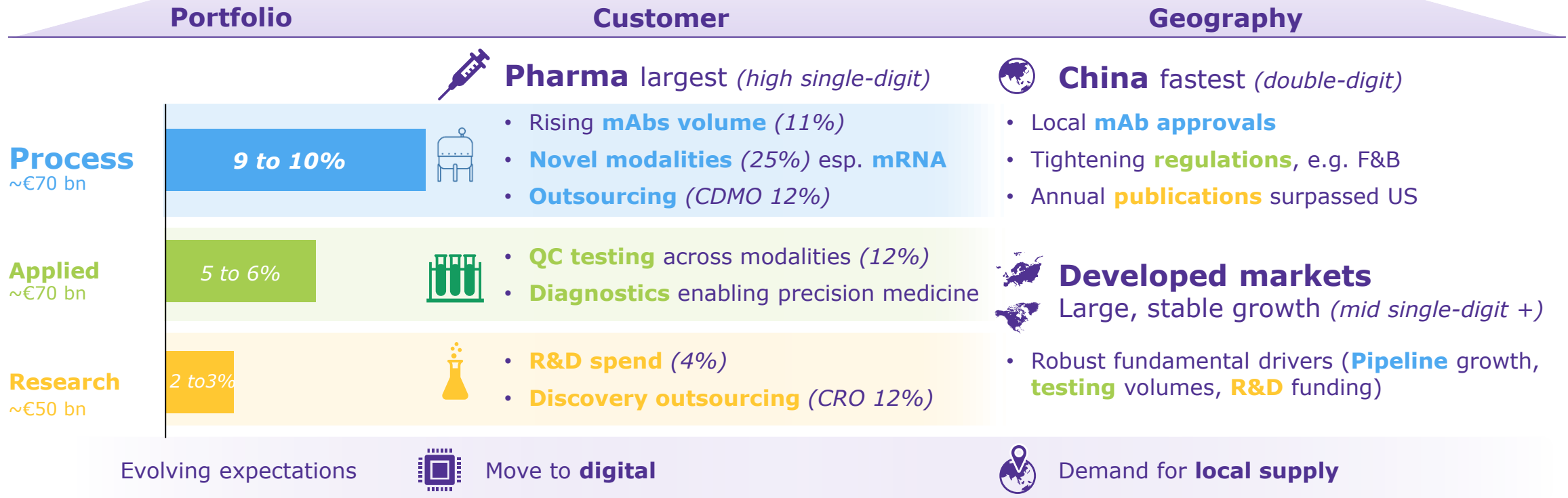
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Life Science Market

Attractive secular drivers across segments create opportunities

Life Science market¹
 2021: ~€190 bn ex COVID, growing 5 to 7%



 **We continuously pursue key growth trends as a leading diversified life science player**

¹ Company estimate based on industry forecast over 5-year horizon for the markets we operate in with all *growth rates* indicating 2021-25 CAGRs; Acronyms: mAbs = Monoclonal Antibodies; mRNA = Messenger Ribonucleic Acid; CRO = Contract Research Organization; CDMO = Contract Development Manufacturing Organization; F&B = Food & Beverage



Life Science Strategy

Focus on strengthening the core and expanding in high-growth areas



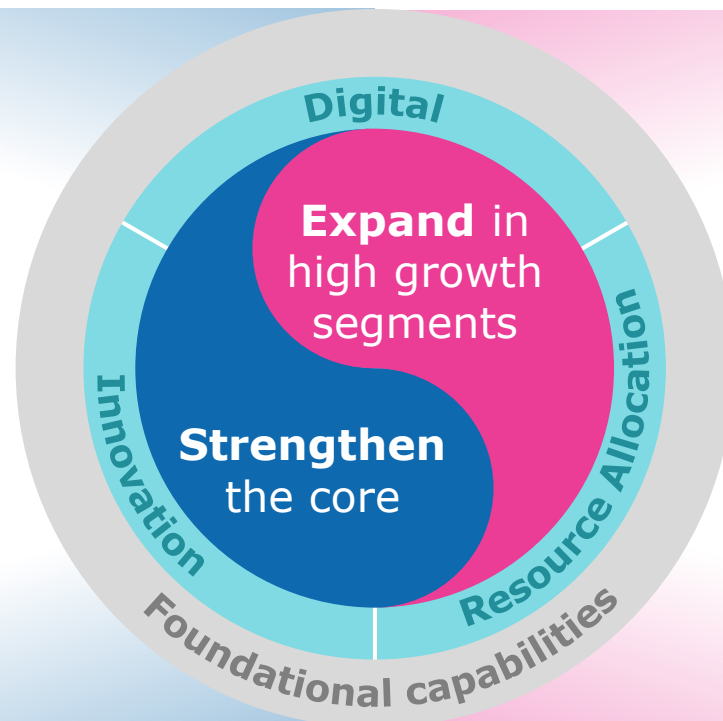
Productivity Gains



Network & Capacity Expansion



Go-To-Market Optimization



New Business Models



Holistic Offering



Emerging Regions



eCommerce • Digital Solutions • Data • R&D • Partnerships • Bolt-on M&A • CAPEX

Regulatory & Quality • Supply Network • People • Culture & Diversity • Sustainability • One Company



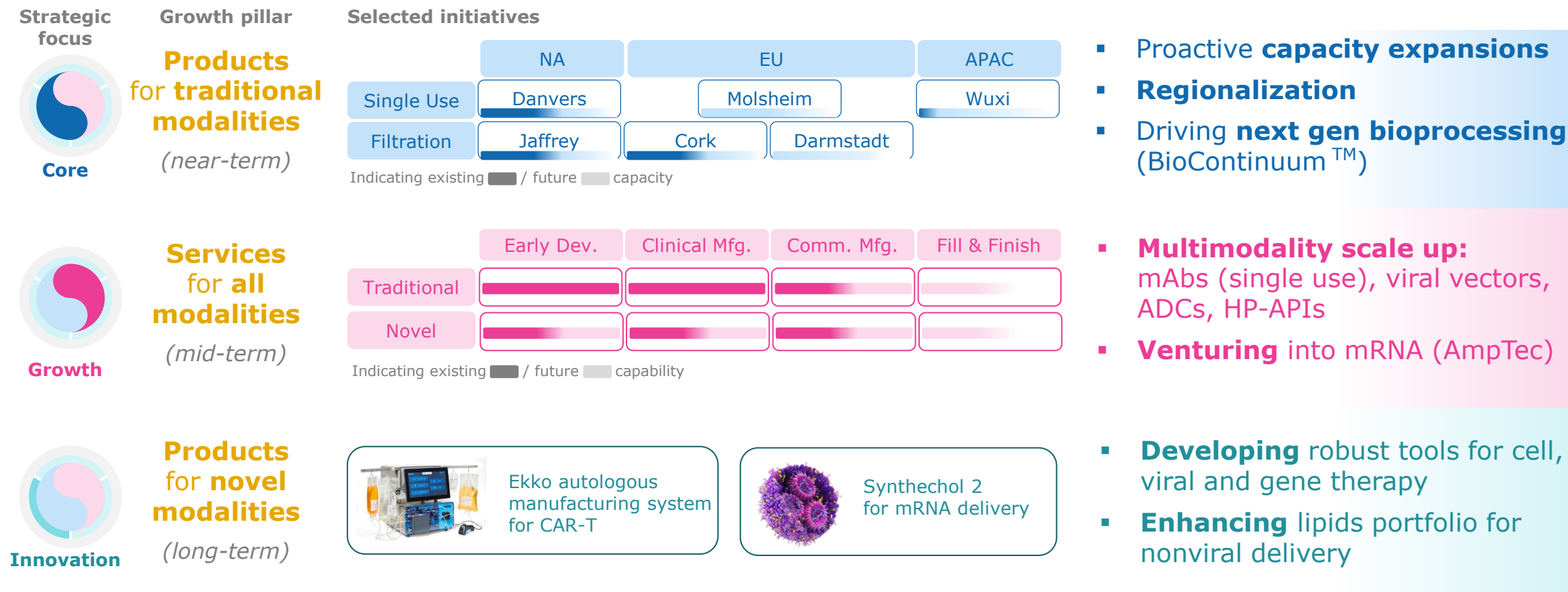
Stringent execution of strategic priorities driving sustained profitable growth; upgrading mid-term outlook to 7 to 10% org. sales CAGR (incl. fading COVID business¹)

¹Mid-term organic sales outlook of 7-10% CAGR assumes fading of COVID-19 related business between two scenarios: A) zero COVID-19 related business in 2025 [implied CAGR of 6 to 9%] and B) COVID-19 related business in 2025 on 2021 level [implied CAGR of 8 to 11%]



Process Solutions – the largest of the BIG3

Fueling the growth engine to accelerate further in a dynamic market



Robust supply enabling attractive base growth, services and innovation as accelerators

Acronyms: mAbs = Monoclonal Antibodies; HP-APIs = High Potency Active Pharmaceutical Ingredients; ADCs = Antibody Drug Conjugates; mRNA = Messenger Ribonucleic Acid



Research Solutions and Applied Solutions

Leveraging strong positions for durable growth in robust markets

Selected initiatives **Research Solutions**

Strategic focus

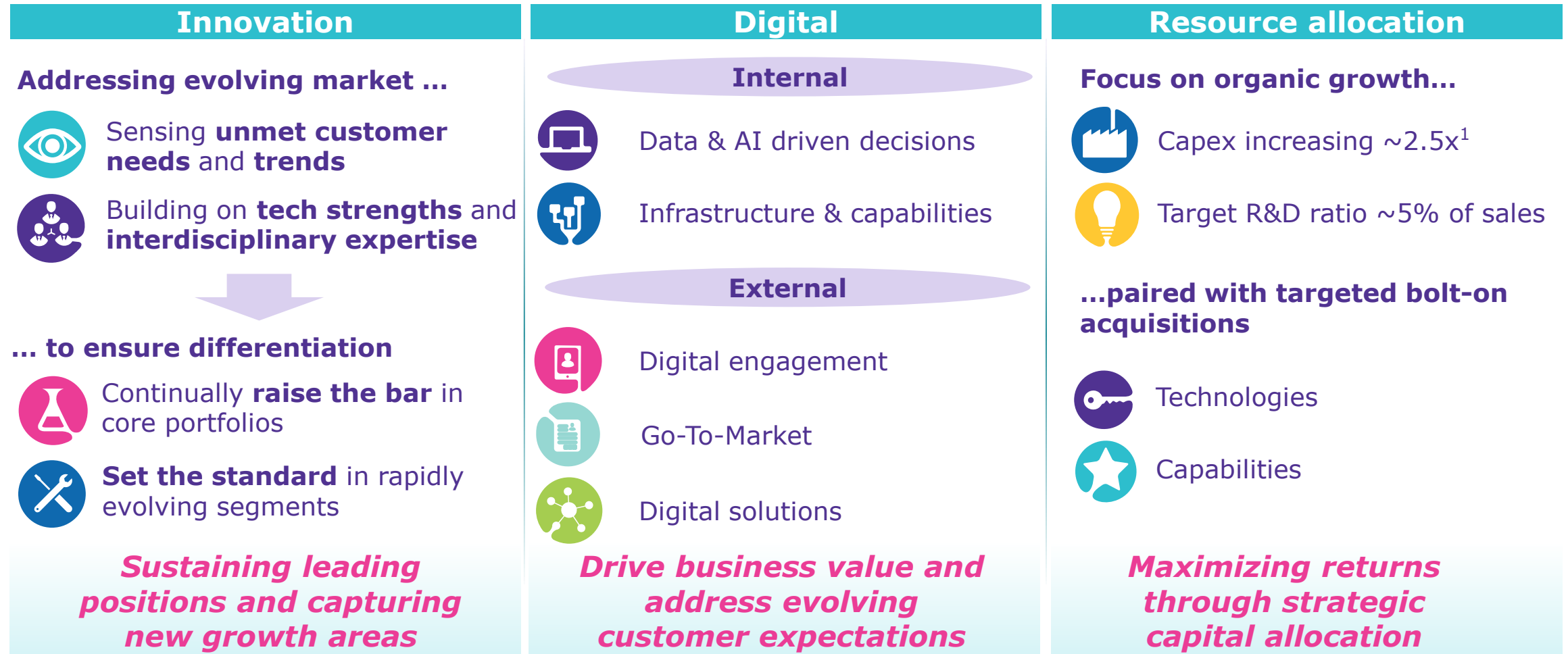
Selected initiatives **Applied Solutions**



Strategic focus on **sustaining core positions** and capturing **higher growth segments**

Innovation, digital and portfolio

Key supporting pillars of strategy for value creation



¹Comparing average capex spend p.a. over the period 2016-20 with the period 2021-25



Meet Our Management

Speakers in Life Science deep dive Q&A

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CEO Life Science



Klaus-Reinhard Bischoff
Head of Research
Solutions



Marc Horn
Head of Life Science
Controlling



Andrew Bulpin
Head of Process
Solutions



Jean-Charles Wirth
Head of Applied
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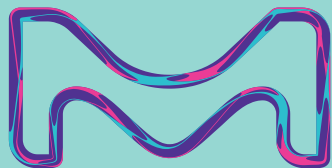


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