ÖSSUR HF.
CAPITAL MARKETS DAY
COPENHAGEN - ADMIRAL HOTEL
NOVEMBER 30TH, 2011
AGENDA

08:15-08:30 Registration and coffee
08:30-08:40 Welcome and Company Video – Sigurborg Arnarsdottir, IR Manager
08:40-09:10 Strategy and Key Highlights – Jon Sigursson, President & CEO
09:10-09:35 The Mexico Manufacturing facility – William Brown, VP of M&O Americas
09:35-10:00 Össur France – Frederic Girard, General Manager Össur France
10:00-10:15 BREAK
10:15-10:40 Medical Office – Dr. Porvaldur Ingvarsson, Medical Officer
10:40-11:00 New Products 2011 – Hilmar B. Janusson, VP of R&D
11:00-11:20 Team Össur and marketing – Edda Heinarun Geirsdottir, Director of Global Marketing
11:20-12:00 Oscar Pistorius – tells his story and gives insight into his fight to be able to compete against able bodied athletes
12:00-13:00 LUNCH

Location:
Admiral Hotel
Toldbodgade 24-28
DK-1253 Copenhagen

www.ossur.com
STRATEGY AND KEY HIGHLIGHTS

Jón Sigurðsson
President & CEO
Where are we now?
How did we get there?
Where are we heading?
How did we get there?

Where are we now?

How did we get there?

Where are we heading?
ÖSSUR – WE ARE...

A global orthopaedics company

Growing through innovation

Positioned for future growth
GLOBAL OPERATIONS – 1800 EMPLOYEES

Well diversified by segments and geography
## Main Markets – Technical Leader

### Bracing and Supports
- 52% of sales
- Products for therapeutic and preventive purposes

### Prosthetics
- 43% of sales
- Replacement of missing limbs

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**Össur Market Share**

- **Market size: USD 2,700 m**
- **Market growth: 3-5%**
- **Fragmented market**

- **Market size: USD 850 m**
- **Market growth: 3%**
- **Consolidated market**

Market information based on industry analysis and management’s estimates.
HIGHLIGHTS 2011

INVESTING IN SALES COVERAGE

- Good organic growth in all main markets

STRONG PRODUCT PIPELINE

- 17 products launched YTD
  - Bionics: comprehensive platform
  - Bracing and supports: robust pipeline

CONSOLIDATING MANUFACTURING LOCATIONS

- Increased manufacturing efficiency with Mexico platform
How did we get there?

Where are we now?

How did we get there?

Where are we heading?
From an O&P workshop in Iceland to a global innovative orthopaedic company

1971
Össur founded in Iceland by Össur Kristinsson, prosthettist, together with several organizations of the disabled in Iceland

1999
Össur listed on the Iceland Stock Exchange

2011

Changes from 1999 to 2010:

- Our sales have grown from USD 18 million to USD 359 million
- Our EBITDA is now 25 times higher
- Our employees have grown from 100 to 1800

Our sales have grown from USD 18 million to USD 359 million
Our employees have grown from 100 to 1800
PROSTHETICS - VALUE THROUGH INNOVATION

Wood & steel

$5
$10
$70

Mechanical

$350
$2,500
$2,000

Current and Future Platforms

$900
$14,000
$9,000

$35,000
USD 29,000

Manufacturer sales price indicators
BRACING AND SUPPORTS PLATFORM

• Leveraging of prosthetic technology platform to increase value through innovation

• Successful product launches and untapped market opportunities

Unloader® knee brace + Iceross® liner = Unloader One®

Miami Lumbar® belt + Unloader One® + Rebound® Air Walker
How did we get there?

Where are we now?

How did we get there?

Where are we heading?
EXTERNAL ENVIRONMENT

HIGHLIGHTS

- Austerity measures – changes in healthcare delivery
- Financial turmoil – limited impact
- Demography – aging population
- Technical development – endless possibilities
GOING FORWARD....

EXTERNAL ENVIRONMENT

- Austerity measures
- Financial turmoil
- Demography
- Technical development

ÖSSUR’S STRATEGY

- Effectively prove and communicate clinical and economical outcome of our products
- Strive to increase efficiency by operational excellence and process improvement initiatives
- Bring life enhancing products to our customers
- Continue increasing value through innovation and a steady product pipeline
GOING FORWARD....

Generating value for individuals and healthcare systems
 WE IMPROVE PEOPLE’S MOBILITY

Listed on NASDAQ OMX Copenhagen
www.ossur.com
MANUFACTURING & OPERATIONS

William Brown, VP of M&O, Ossur Americas
MANUFACTURING & DISTRIBUTION LOCATIONS

14 locations - 800 employees

- Reykjavik, Iceland
- Tijuana, Mexico
- St. Etienne, France

- Distribution
- Manufacturing
- Outsourced Manufacturing
ÖSSUR GLOBAL DISTRIBUTION NETWORK

Outsourced manufacturing
- Euromedical (joint venture)
- Outsourced mfg

Internal Manufacturing
- Trevoux
- Reykjavik
- Albox
- Foothill Ranch
- Tijuana
- Richmond

Distribution
- St Etienne
- Eindhoven
- Paulsboro
- Geneva
- Capetown
- Lippesala
- Madrid
- Manchester
- Hong Kong
- Shanghai
- Sydney

Total incl. Dropship 87.2% 69,655

30-40 containers per month from Asia

* Medline / Aliso Viejo excluded
**PROSTHETICS**
- MAIN MANUFACTURING ACTIVITIES

*The majority of the manufacturing activities within prosthetics is located in Iceland*

<table>
<thead>
<tr>
<th>Location</th>
<th>Products</th>
<th>OTS/CM</th>
<th>Process</th>
<th>Materials / function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Iceland</td>
<td>Liners</td>
<td>OTS</td>
<td>Molding</td>
<td>Silicone</td>
</tr>
<tr>
<td></td>
<td>Feet</td>
<td>OTS assembled from standard components</td>
<td>Lay-up</td>
<td>Carbon fibers</td>
</tr>
<tr>
<td></td>
<td>Bionics</td>
<td>OTS</td>
<td>Assembly</td>
<td>Mechanics &amp; electronics</td>
</tr>
<tr>
<td></td>
<td>Adaptors &amp; components</td>
<td>OTS</td>
<td>Assembly</td>
<td>Metals</td>
</tr>
<tr>
<td></td>
<td>Machined parts</td>
<td>OTS</td>
<td>CNC machining</td>
<td>Metals</td>
</tr>
<tr>
<td>Michigan</td>
<td>Knees</td>
<td>OTS</td>
<td>Assembly</td>
<td>Mechanical</td>
</tr>
</tbody>
</table>

Note: OTS means "off-the-shelf" and CM means "custom made"
**BRACING AND SUPPORTS**  
- **MAIN MANUFACTURING ACTIVITIES**

*Products within the dotted line will have been transferred to Mexico by year-end 2011.*

<table>
<thead>
<tr>
<th>Location</th>
<th>Products</th>
<th>OTS/CM</th>
<th>Process</th>
<th>Materials/Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Jersey</td>
<td>Collars</td>
<td>OTS</td>
<td>Injection molding</td>
<td>Plastics, Textile, Soft materials</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Thermoforming Soft goods</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>California</td>
<td>Braces IS &amp; GII</td>
<td>CM</td>
<td>Custom manufacturing</td>
<td>Plastics, Reinforced plastics, Carbon fibers, Textile</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asian suppliers</td>
<td>Bracing &amp; Support</td>
<td>OTS</td>
<td>Cut &amp; sew Injection molding Assembly</td>
<td>Plastics, Textile, Metals, Carbon fiber</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>France</td>
<td>Bracing &amp; Support Compression therapy</td>
<td>OTS</td>
<td>Cut &amp; sew Knitting</td>
<td>Textile</td>
</tr>
</tbody>
</table>

*Note: OTS means "off-the-shelf" and CM means "custom made"*
M&O MAIN FOCUS AREAS

- Safety – employees and assets
- Product quality
- Service – reliable delivery to customers
- Cost leadership
  - Consolidation projects
  - Lean Manufacturing
  - Continuous improvement culture
  - Product design with low cost manufacturing
**MAIN INITIATIVES & PROJECTS**

- Consolidation of manufacturing units
- Increased efficiency, via consolidation and lean manufacturing
- Reykjavík and Mexico will become the main manufacturing facilities

<table>
<thead>
<tr>
<th>Initiative</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process Improvements</td>
<td>🟫</td>
<td>🟫</td>
<td>🟫</td>
<td>🟫</td>
</tr>
<tr>
<td>Consolidate European Knee Braces</td>
<td>🟩</td>
<td>🟩</td>
<td>🟫</td>
<td>🟫</td>
</tr>
<tr>
<td>Open Össur Mexico</td>
<td>🟫</td>
<td>🟫</td>
<td>🟫</td>
<td>🟫</td>
</tr>
<tr>
<td>Spinal to Mexico</td>
<td>🟫</td>
<td>🟫</td>
<td>🟫</td>
<td>🟫</td>
</tr>
<tr>
<td>Knee Braces to Mexico</td>
<td>🟫</td>
<td>🟫</td>
<td>🟫</td>
<td>🟫</td>
</tr>
<tr>
<td>Further “Insourcing” &amp; New Products</td>
<td>🟫</td>
<td>🟫</td>
<td>🟫</td>
<td>🟫</td>
</tr>
</tbody>
</table>
MEXICO OPERATION

- 125 employees currently
- 160 employees at year-end
MEXICO OPERATION - MAJOR MILESTONES

2010
- First employees hired August
- Spinal products transfer completed December
- 45 employees at year-end

2011
- Official inauguration event September
- Foot Covers and Knee Braces transferred from US
- 160 employees at year-end

2012
- More products transferred; site consolidation continues
- New R&D projects introduced for manufacture

Focus on: safety, quality, cost, productivity - driving to world-class performance by 2015
MEXICO OPERATION – OFFICIAL OPENING IN SEPTEMBER

- Grand Opening attended by Mexican governor and 200 guests
- The transfer has been efficient and manufacturing quality excellent
- State of the art equipment
- Highly qualified employees
- Savings as of 2012 USD 4 million
**WHY MEXICO?**

**Close to Össur location in California**
- Favorable for custom manufacturing – Asia is hardly an option
- Favorable for efficient new product launches in B&S as R&D is in Foothill

**Costs**
Employee cost in Mexico 25% of labor cost in US and Europe

**Logistics**
Mexican goods cross the US border smoothly on daily basis
More favorable than Asia for the US market as well as Europe

**Risk**
Mexico is less risky than China in terms of IP protection, quality assurance, travel costs, and communication

**Skills**
Governments and schools in several states collaborate with the industry to ensure high-skilled manpower for high-tech and other important sectors

**Trade**
NAFTA and similar free-trade deals with Japan, Europe, and most of Latin America, give Mexico duty-free access to more markets than any other country
M&O PATHWAY TO OPERATIONAL EXCELLENCE

An integrated effort to eliminate waste and drive efficiencies into key manufacturing and distribution sites, while leveraging improvements to all Össur facilities, with the goal of becoming “World-Class” by 2015

- Lean Manufacturing
- Execute excellence initiatives in manufacturing and distribution
- Culture of continuous improvement
- Employee engagement
- Goal of becoming “World-Class” by 2015
ÖSSUR FRANCE

Dr. Frédéric Girard
Managing Director
Gibaud, a well-known brand in France

- 357 employees
- Two locations

Saint Etienne  
Trévoux
### HISTORY – OVER 120 YEAR OLD BRAND

Gibaud: 120 years of **technical textiles**, 80 years of **medical know-how**

<table>
<thead>
<tr>
<th>Year</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>1890</td>
<td>Foundation of “Pichon Frères”</td>
</tr>
<tr>
<td>1935</td>
<td>Dr. Gibaud is launching the first line of reimbursed products (Gibortho)</td>
</tr>
<tr>
<td>1980</td>
<td>Dr. Gibaud is strengthening its focus on medical communication</td>
</tr>
<tr>
<td>2005</td>
<td>Össur is acquiring Gibaud. Refocus on medical products</td>
</tr>
<tr>
<td>2007</td>
<td>Gibaud is diversifying to non-medical / non-prescription products to pharmacies</td>
</tr>
<tr>
<td>2011</td>
<td>Gibaud is strengthening its focus on medical communication</td>
</tr>
</tbody>
</table>
THE MARKET FUNDAMENTALS

<table>
<thead>
<tr>
<th>Bracing and supports, Compression therapy</th>
<th>Prosthetics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reimbursement</td>
<td>Reimbursement Insurances</td>
</tr>
<tr>
<td>85-90% Prescribed</td>
<td>100% Prescribed</td>
</tr>
<tr>
<td>90% Pharmacies 23,000 Pharmacies</td>
<td>100% O&amp;P Workshops 220 workshops</td>
</tr>
</tbody>
</table>

same market fundamentals, complete synergy
PRODUCT SEGMENTS AND MARKETS

BALANCED PORTFOLIO

- Compression therapy
- Prosthetics
- Bracing & supports

SIGNIFICANT MARKET

- Bracing and Supports
- Prosthetics
- Compression therapy

Market size: 725 m USD
Market growth: +6%

B&S, CT, Prosthetics
**Major refocus on medical** - products, prescribers and influencers

<table>
<thead>
<tr>
<th>Year</th>
<th>Family</th>
<th>Private Equity</th>
<th>Össur</th>
</tr>
</thead>
<tbody>
<tr>
<td>1935</td>
<td>1st lumbar belt</td>
<td>Focus on reimbursement</td>
<td></td>
</tr>
<tr>
<td>1980</td>
<td>Focus on reimbursement</td>
<td>Diversification</td>
<td></td>
</tr>
<tr>
<td>2005</td>
<td>Diversification</td>
<td>Refocus on medical</td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td></td>
<td>. Products by indications</td>
<td></td>
</tr>
<tr>
<td>2009</td>
<td></td>
<td>. Differentiation rheumatology / traumatology</td>
<td></td>
</tr>
<tr>
<td>2011</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>2012</td>
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</tr>
</tbody>
</table>

- **Products, market access**
  - 1st lumbar belt
  - Focus on reimbursement
  - Diversification
  - Refocus on medical
  - . Products by indications
  - . Differentiation rheumatology / traumatology

- **Fitters, retailers**
  - Pharmacists

- **Prescribers**
  - . Visit to GPs and key specialists
  - . Partnerships with leading scientific societies
PROSTHETICS – SALES INCREASED BY 66% SINCE 2006

Synergies from the Gibaud acquisition – cross selling opportunities

<table>
<thead>
<tr>
<th>Year</th>
<th>Products, market access</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>Talux</td>
</tr>
<tr>
<td>2007</td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td></td>
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<tr>
<td>2009</td>
<td></td>
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<tr>
<td>2010</td>
<td></td>
</tr>
<tr>
<td>2011</td>
<td>Rheo knee/Reflex Rotate</td>
</tr>
<tr>
<td>2012</td>
<td></td>
</tr>
</tbody>
</table>

Fitters, retailers:
Technical education → Sales Forces Effectiveness / Segmentation

Prescribers:
Education based on medical needs (seminars)
2000 attendees, 40 events
Rehab doctors, PTs, CPOs
Compression therapy is addressing another segment of **vascular diseases**

**Elastic compression: the reference treatment for the veins diseases**

Chronic venous insufficiency: treatment of symptoms, prevention of complications
Deep venous thrombosis: prevention

Vein circulation: fighting against gravitation
Chronic venous disease: insufficiency of valvules
Chronic venous disease: a serious medico-economic burden
Compression therapy: to restore the blood flow
KEY DRIVERS FOR GROWTH

- Products offering
- Medical image
- Access to decision makers
- Professional sales forces
A premium portfolio driven by medical indications / needs, easy to understand for the prescribers, the fitter and the patient

Back pains: a major medical burden

- 30% of the population*
- 12.5% of all sick days**
- 185 m days restricted activity
- 83 m days confined in bed***

Gibaud lumbar belts: A revamped offer to answer each patients’ profile

* USA ** UK *** USA chronic back pain

A *premium portfolio* driven by *medical indications / needs*, easy to understand for the *prescribers*, the *fitter* and the *patient*

**Chronic Venous Insufficiency**

*Major unsatisfied needs*

- ½ women
- ¼ men

- **2%** of patients are equipped

**Gibaud compression: therapy**

*A revamped offer to answer each patients’ profile*

- **PREMIUM line**
  - Exclusive design and materials
  - Aesthetism and comfort for an improved compliance

- **STANDARD line**
  - Optimal quality / price ratio
A solid medical positioning to support the image of the products

Attentes, éducation thérapeutique et satisfaction des personnes au port d’une compression élastique en pharmacie d’officine

Expectations, therapeutic education and satisfaction of users of elastic compression in pharmacies

5,000 patients

Dr JL Gillet, President, French Society of Phlebology
Pr FA Allaert, Vice President, French Society of Phlebology
ACCESS TO DECISION MAKERS

Refocusing on decision maker’s education

Historical

Pharmacists
Orthopedists

Historical, abandoned in 2005, refocus in 2011

General practitioners
Rheumatologists
Phlebologists
Orthopaedic surgeons
A comprehensive sales forces effectiveness plan focused on medical marketing to strengthen the position of Gibaud as the technical reference in its markets.
A CUSTOMER CENTRIC ORGANIZATION

A sustained improvement of the customers’ perception

Source: IPSOS
GOING FORWARD...

Further focus on medical value added

- One century of expertise in technical/medical textiles
- Leverage on technology know how from prosthetics
- Bring innovations with true medico-economic value
- Focusing on genuine medical needs and expectations
MEDICAL OFFICE

Dr. Þorvaldur Ingvarsson
Medical Officer
MEDICAL OFFICE – PROVIDING PROVEN CLINICAL BENEFITS

- Documentation of clinical benefits
- Clinical studies
- Development of protocols
- Design of new products
- Educational material
- Reimbursement justification
Build into a coordinated system; medical foundation biomechanical understanding, technical features and clinical benefits
Several studies published in 2011 and many ongoing studies
STUDIES THAT PROVE CLINICAL BENEFITS
Indications:

- Soft tissue injuries
- Sprains
- Stable fractures
- Post-operative use
- Trauma and rehab

The Rebound Air Walker - latest addition to the Össur line of walkers
WALKERS VS. CAST
- Do walkers immobilize as well as a cast?

*Cast seen as the golden standard in Europe whereas walkers more frequently used in the US*
Foot scans were performed on the Rebound Air Walker to objectively measure the pressure patterns and analyze the gait dynamics.

The red dots represent Center of Pressure plotted in time.

- Toe-Off: Toe-off shows good progression.
- Mid-Stance: Mid-stance is balanced and straight.
- Heel Strike: Heel strike is curved more naturally.
The Össur walkers are as good as cast and superior to other walkers

- Better pressure distribution than in a plastic cast
- Restrict flexion and extension as well as plastic cast
- Shorter rehab time
- Better quality of live
OA is a leading cause of disability in the “western” world, accounting for half of all chronic conditions in persons aged 65+. 

**What Causes Osteoarthritis (OA)**

**Biomechanical factors**
- chronic (overload and instability)
- injuries

**Predisposition**
- age
- sex
- genetics
- other systemic factors

KNEE OA
THE DOMINO EFFECT

- High Blood Pressure, Heart Disease, Diabetes
  - Obesity
    - Hypertension, Sleep Apnea, Depression
  - More Weight Gain
  - Greater Stress on Knee
  - Food As Habit
  - Opposing Knee, Hip & Back Pain
  - Weight Gain
  - Lack of Exercise
    - Loss of Activity
      - Inconvenience
  - Knee Pain
HOW DO WE TREAT KNEE OA

- **Mild OA**
  - Information, education, and self help: All
  - Non surgical interventions: Some
  - Surgery: Few

- **Severe OA**
  - Information, education, and self help: All
  - Non surgical interventions: Some
  - Surgery: Few
INCREASE IN DEMAND FOR TOTAL KNEE REPLACEMENTS

Each operation is estimated to cost up to USD15,000

- Population is aging
- Number of people older than 65 expected to double between 1999- and 2020
- Dramatic increase in number of surgeries since 1975
The Unloader One - clinically proven to reduce joint pain

- Reduction of compartments loads
- Reduction of adduction movements
  - Less pain
  - Increased function
- Slows down the disease
UNLOADER ONE – PROVEN CLINICAL BENEFITS

- Major pain relief with less medication
- Increased mobility
- Delays operations
- Clinically proven benefits supported by number of studies
- Major ongoing studies

Ingvarsson T, Franklin J, Hardardottir E: Patients with moderate and severe OA do benefit from using a valgus knee brace. AAOS, March 2010.

THE KEY TO THE TREATMENT OF KNEE OSTEOARTHRITIS
- Unload it

Waller C, Hayes D, Block JE, London NJ.
PMID: 21298256 [PubMed - in process]
GOING FORWARD.....

Medical based product development

- User driven innovation
- Medical indications and necessity key drivers
- Increased level of clinical evidence
- Effectively prove and communicate clinical outcome
R&D – NEW PRODUCTS

Hilmar B. Janusson
VP of R&D
B&S FOCUS BRANDS

• Flagship Products

• Rebound®
  - F&A Soft Knee & UX

• CTi®
  - Ligament

• Unloader One®
  - OA

• Miami Lumbar®
  - Spine

• Miami J®
  - Cervical

• Mainstream Products

• Form Fit®
  - UX, Knee & Ankle

• Equalizer®
  - Walkers

• Philadelphia®
  - Spine

• MVP®
  - Ligament

• Innovator®
  - Post Op
RESEARCH AND DEVELOPMENT

HIGHLIGHTS

- 17 products launched YTD
- IP status: 113 new patents, 76 applications filed
- 10 clinical studies in 2011
- 9 scientific papers submitted
- Innovation is a key pillar in the strategy and the catalyst for organic growth
NEW PRODUCTS LAUNCHED 2011 - PROSTHETICS

**Mechanical Prosthetics**
- Flex-Foot® Balance
- Re-Flex Rotate™
- Iceross Dermo® Conical
- Balance Knee
- Re-Flex Shock™
- LP Rotate™

**Bionics**
- Rheologic Workbench
- PROPRIO FOOT®
- SYMBIONIC LEG®
NEW PRODUCTS LAUNCHED 2011 – B&S

Flagship
- Functional Hip
- MVP® Contour
- Unloader One® Plus
- Miami Lumbar® Slim
- Miami Lumbar® Generic
- Rebound® Knee Brace

Mainstream
- Form Fit® Ankle
- Form Fit® Wrist & Thumb
- Form Fit® Knee Brace
- Form Fit® Foot-Up
- Trainer OA

JAN 2011

NOV 2011
FLEX-FOOT

RE-FLEX FOOT SERIES

• Maintaining leadership in high performance feet
• Designed for active lifestyle
• Flex-Foot characteristics with added function
BIONIC TECHNOLOGY

Adaptive, instinctive, intelligent prosthetics

RHEOLOGY

RHEOLOGIC™ Workbench

New software designed to facilitate optimal clinical outcome and customer service
WORLD’S FIRST BIONIC LEG

- Seamlessly unites the proven capabilities of RHEO KNEE® and PROPRIO FOOT®
- Introduced at AOPA trade show, September 2011
- Limited launch Q4 2011
Prolific product pipeline
- 4 New products in 2011
  - Form Fit Ankle
  - Form Fit Wrist & Thumb
  - Form Fit Knee Brace Range
  - Form Fit Foot-Up
- Mid-range value positioning
Prolific product pipeline
- 2 new products
  - Rebound knee brace range
  - Functional Hip
Innovation
High-end value proposition
Miami Lumbar is a new product line

- Successful launches
- First introduced in 2010, one new launch in 2011
  - Miami Lumbar Slim
- Based on know-how from Gibaud
BRACING AND SUPPORTS – UNLOADER ONE

- Extension of patient group
- Unloading technology based on medical foundation
- One new product this year
  - Unloader One Plus
- Focus on clinical results
  - Ground breaking results
GOING FORWARD WE WILL.....

- Continue increasing value through innovation
- Have a steady product pipeline
- Effectively prove and communicate clinical outcome of the Company’s products

Successfully commercialize our innovation and generate value for individuals and health care systems

Innovation is the profitable implementation of ideas
MARKETING AND TEAM ÖSSUR

Edda H. Geirsdóttir, Director of Global Marketing
DECENTRALIZED MARKETING ORGANIZATION

Headquarters
Reykjavik, Iceland

Össur Americas
California, USA

Össur EMEA
Eindhoven, Netherlands

Össur Asia
Shanghai, China

Total Marketing Employees Worldwide = 70
GLOBAL VS. LOCAL

Consistency:
- Consistent brand message
- Economies of scale
- Free flow of information
- Quality

Customization:
- Market differences
- Product life cycle
- Level of brand awareness
- Cultural differences
FINDING THE BALANCE

Alignment tools:

- Corporate Identity Manual
- Marketing Collateral Database
- Global Graphic Designers Network
- Brand Audit
BUILDING A STRONG GLOBAL BRAND

- Implementing post-acquisition brand strategy
- Brand equity surveys
- Streamlining product line brands
REAL PEOPLE, REAL PRODUCTS

Bill Blemyer was diagnosed with severe osteoarthritis in his left knee, but he wasn’t ready to commit to a total knee replacement yet!

As a busy CFO and exerciser, he knew the pain and limitations from Bill’s condition were affecting all aspects of his life. Having gone through two knee surgeries when he was younger, he knew what it would entail.

Bill’s physician opted to prescribe an Unloader One. Bill is now doing things he hasn’t been able to do for years, like running, hiking and golfing. Most importantly, he is doing them pain free.

Unloader One® OA braces are available in custom and off-the-shelf models. Visit www.ossur.com/unloader-one to see Bill’s video and learn more.

USA 888 423 9727 CANADA 800 663 5982

Life Without Limitations®

CTI Knee Braces are available in custom and off-the-shelf models. Visit www.ossur.com/cti to see Toby’s video and learn more.

USA 800 233 6263 CANADA 800 663 5982

Life Without Limitations®
SUCCESSFUL MEDIA OUTCOME

Disabled athletes gather in the British capital, which in 2012 will play host to the Paralympics, along with the Summer Games. They came together a day before International Paralympic Day, marked in Trafalgar Square with activities aimed at informing the public about the sports competition.
Overall, are you positive or negative towards Ossur?

- Positive: 94%
- Negative: 2%
- Neither nor: 4%

Which company/supplier is the first to come to mind when you think of Bionic Technology?

- Össur: 63.4%
- Otto Bock: 33%
- RSL Steeper: 1%
- Other: 2.6%

Of the following companies, which provides the best on time delivery?

- Össur: 66.4%
- Otto Bock: 10.1%
- Bauerfeind: 4.4%
- Medi: 4.3%
- Camp: 1.9%
- Streifeneder: 1.5%
- Beagle: 1.2%
- Wagner: 0.9%
- OWW: 0.9%
- DJO: 2.0%
- Other: 6.8%

Survey results from Capacent Gallup January 2011
CONSISTENT SURVEY = TRENDS

Have you complained or expressed criticism of products or service from Össur in the last 12 months?

Yes 23.3%

No 76.7%

How satisfied or dissatisfied are you with the handling or service that your complaint received?

Survey results from Capacent Gallup January 2011
“Based on your experience, on a scale of 0-10, how likely are you to recommend Össur?”

Promoters: 51%
Passives: 42%
Detractors: 7%

Average: 44%
GOING FORWARD.....

2012 and beyond

- Indication based marketing
- End-user awareness
- Digital marketing
- Continue to measure customer satisfaction and loyalty
WE IMPROVE PEOPLE’S MOBILITY

Listed on NASDAQ OMX Copenhagen
www.ossur.com

Life Without Limitations®