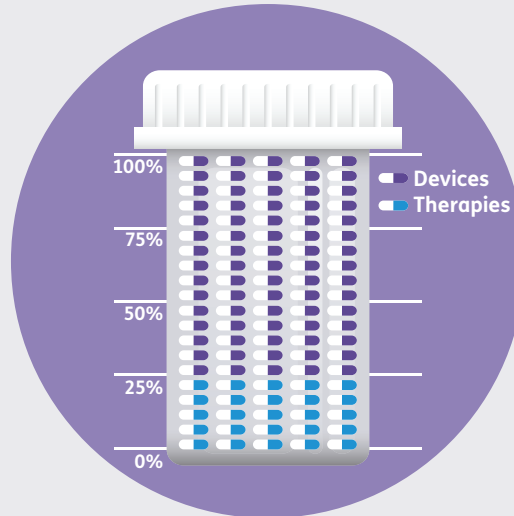


Future of Regenerative Medicine

Devices Ruled the Past Regenerative Medicine Landscape

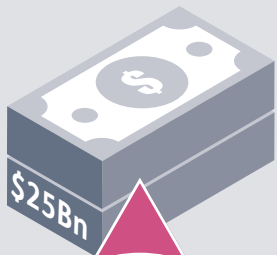
PAST



193
approved regenerative medicines

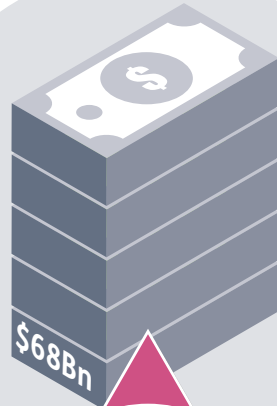
Financial Investment in the Present Market is Bringing a Shift towards Regenerative Therapies

PRESENT



\$25Bn

raised in financing through more than 600 transactions



100+

mergers and acquisitions were announced at a total of \$68Bn

1995

114
therapies in the pipeline

2017

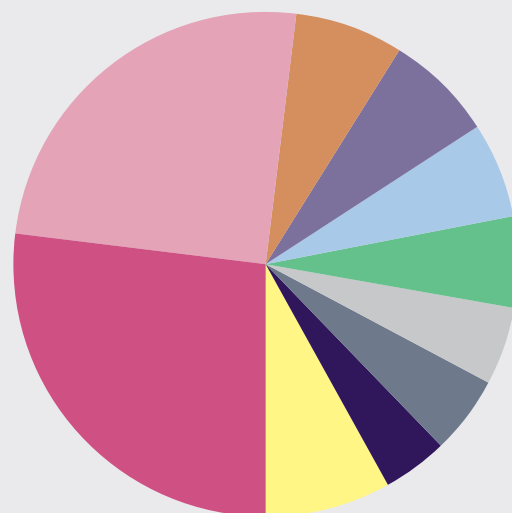
1000+
therapies in the pipeline

11%
CAGR increase of therapies in pipeline

The Shift towards Therapies Will Lead to Future Breakthroughs in Cancer and Rare Diseases

FUTURE

Cancer and rare diseases represent **52%** of the therapy pipeline



CAR-T is the next-generation treatment standard in immuno-oncology

- Oncology
- Rare Diseases
- Alimentary/metabolic
- Neurological
- Cardiovascular
- Musculoskeletal
- Sensory
- Immunological
- Blood and Clotting
- All Others