Founded in 1992, ORTHOWORLD® is the only producer of strategic intelligence in the world solely focused on the orthopaedic market. Its singular mission is helping orthopaedic companies and individuals improve their performance.

Highly specialized product offerings such as ORTHOFLASH®, ORTHOWORLD Membership, THE ORTHOPAEDIC INDUSTRY ANNUAL REPORT®, ORTHOPRENEUR®, BONEZONE® and OMTEC®, The Orthopaedic Manufacturing & Technology Exposition and Conference, empower industry participants to respond to challenges, maximize opportunities and more aggressively expand their orthopaedic businesses.

We welcome the opportunity to personally assist you.

Please contact:

Julie A. Vetalice
440.543.2101
julie@orthoworld.com
INTRODUCTION

THE TOP TEN COMPANIES IN ORTHOPAEDICS:
ESTIMATED MARKET SHARES IN 2012

DePuy Synthes 22%
Stryker 15%
Zimmer 10%
Smith & Nephew 8%
Medtronic 7%
Biomet 6%
Arthrex 3%
DJO 2%
Aesculap 2%
NuVasive 1%
All Others 24%

Thanks for your interest in ORTHOWORLD’s Top Ten Company Profile series. Whether you’ve chosen one, two or the whole set, here’s what you’ll find within.

Each profile starts with the bones of each company: where they are, who they are, how much they sold over the past three years, and so forth. Product matrices let you quickly see where each company plays in the implantable and biologic markets.

Then, we summarize what each one has been doing for the past three years: mergers, acquisitions, divestitures, product launches, clearances, various regulatory events and so forth. Each profile closes with final observations—a little something extra about the company.

The idea for The Top Tens arose while assembling this year’s installment of THE ORTHOPAEDIC INDUSTRY ANNUAL REPORT®. While the annual report lends a very broad, high-level view of the industry overall, the Top Tens allow you to dig a little deeper, with a lot of information collected in one spot.

How will you use these Top Tens? What more would you like to see? Please share your thoughts. I’d be delighted to hear them.

Julie A. Vetalice
julie@orthoworld.com
ORTHOWORLD Inc.
Stryker is one of the world’s leading medical technology companies and is dedicated to helping healthcare professionals perform their jobs more efficiently while enhancing patient care. The company offers a diverse array of innovative medical technologies, including reconstructive, neurotechnology and spine products.

**Product Portfolio**

Specialties: Reconstructive (Hips, Knees, Trauma, Extremities); MedSurg (OR Equipment, Endoscopy, Patient Handling, Reprocessing & Remanufacturing); Neurotechnology & Spine (Spinal Implants, Interventional Spine, Craniofacial, Neurovascular, Neurosurgical, Spine & ENT)

**Implantarble and Biologic Product Matrix**

Company participates in categories depicted in black.

<table>
<thead>
<tr>
<th>Reconstructive</th>
<th>Fracture Repair</th>
<th>Arthroscopy/Soft Tissue</th>
<th>Spinal Implants/Instrumentation</th>
<th>Orthobiologics</th>
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<tbody>
<tr>
<td>Hip</td>
<td>ExFix</td>
<td>Arthroscopy Equipment</td>
<td>Fusion</td>
<td>Synthetics</td>
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<tr>
<td>Knee</td>
<td>IM Nail</td>
<td>Soft Tissue Fixation</td>
<td>Motion Preservation/Dynamic Stabilization</td>
<td>Allograft/Xenograft/DBM</td>
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<tr>
<td>Shoulder</td>
<td>Hip Fix</td>
<td>Artificial Ligaments/Tendons</td>
<td>Nucleus Replacement/Annular Repair</td>
<td>PRP/Cell Based/Osteoinductive</td>
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<tr>
<td>Hand/Wrist</td>
<td>Other Internal Fix*</td>
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<td>Facet Repair/Replacement</td>
<td>Tissue Repair/Regeneration</td>
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<tr>
<td>Elbow/Radial Head</td>
<td>Bone Growth Stim</td>
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<td>Osteoplasty/Bone Cement</td>
<td>Viscoclastics</td>
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<td>Subtalar/Great Toe</td>
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<td></td>
<td>Artificial Discs</td>
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<tr>
<td>Ankle</td>
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<td></td>
</tr>
</tbody>
</table>

*Other Internal Fixation includes plates, screws, staples, etc. for use in fracture repair, fusion, osteotomy, etc.*
Key Competitors
- Arthrex
- Biomet
- ConMed
- Covidien
- DePuy Synthes/Johnson & Johnson
- DJO Global
- Karl Storz
- Medtronic
- NuVasive
- Smith & Nephew
- Zimmer

Revenue
MedSurg sales include patient handling and emergency medical equipment.

Stryker Worldwide 2012 Revenue: By Segment ($Millions) with Percent of Whole

Stryker Worldwide Sales Growth Trajectory: 2010 to 2012 ($Millions)
### Stryker Worldwide Sales: 2010 to 2012 ($Millions)

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2011</th>
<th>2010</th>
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</thead>
<tbody>
<tr>
<td><strong>Reconstructive</strong></td>
<td></td>
<td></td>
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<tr>
<td>Knees</td>
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<td>$1,316</td>
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<td>$3,549</td>
</tr>
<tr>
<td><strong>MedSurg</strong></td>
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<td></td>
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<tr>
<td>Instruments</td>
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<tr>
<td><strong>Neurotechnology and Spine</strong></td>
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<td>$1,437</td>
<td>$968</td>
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<tr>
<td>Neurotechnology</td>
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<tr>
<td>Spine</td>
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<td>$968</td>
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$ Change YoY

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<tr>
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<tr>
<td><strong>Total</strong></td>
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<tr>
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<td>48%</td>
<td>6%</td>
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<tr>
<td><strong>Total</strong></td>
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MedSurg sales include patient handling and emergency medical equipment.
Merger & Acquisition and Strategic Initiative Highlights, January 2010 to May 2013

Mergers & Acquisitions

2010

- Closed acquisition of Ascent Healthcare Solutions, a reprocessor of medical devices
- Synergetics closed a previously-announced agreement with Stryker that included the sale of assets related to the Sonopet/Omni product line; Synergetics will receive $2.5 million to $3.0 million in proceeds from the transactions
- Acquired Porex Surgical, a manufacturer of bioimplantable porous polyethylene products for reconstructive surgery of the head and face. The products complement Stryker’s present craniomaxillofacial line.
- Entered into a definitive agreement with Olympus for sale of its OP-1 products (e.g. OP-1 Implant, OP-1 Putty, Opgenra and Osigraft) for orthopaedic bone applications for $60 million. Stryker is continuing clinical efforts using BMP-7 for potential use in the treatment of osteoarthritis and other non-orthopaedic applications.

2011

- Closed sale to Olympus of the OP-1 product family for use in orthopaedic bone applications
- Entered into a definitive agreement to acquire Orthovita in a cash transaction valued at $316 million. Orthovita reported 2010 product sales of ~$95 million.
- Entered into a definitive agreement to acquire Memometal Technologies in an all-cash transaction for $150 million with up to ~$12 million in milestone payments. Memometal manufactures shape memory metal alloy-based products for extremity indications, and posted 2010 sales of ~$30 million.
- Completed acquisition of Orthovita
- Closed acquisition of Memometal Technologies
- Reports allege that Smith & Nephew is the subject of possible takeover bids from Biomet and Stryker.
- Announced intent to make a voluntary general offer to acquire all shares of Trauson for a total consideration of $764 million in an all-cash transaction, representing an enterprise value of ~$685 million. Trauson, manufacturer of trauma and spine devices in China, reported 2011 sales of ~$60 million.
- Completed acquisition of Trauson
- VertiFlex sold certain assets of its non-core spinal implant technologies to Stryker for an undisclosed amount

Strategic Initiatives

2010

- Premier Purchasing awarded agreements to CONMED Linvatec, Smith & Nephew and Stryker to supply arthroscopy products to Premier’s acute care and continuum of care members, and to Brasseler, CONMED and Stryker Instruments for orthopaedic power tools and accessories.
- ETEX announced that it entered into an agreement with Stryker’s Spine division to market and sell Bio MatrX Structure and Bio MatrX Generate bone graft substitute products.
- Six hospitals will help fund the Bioengineering Alliance of South Carolina, a consortium representing scientists at local universities. Stryker has agreed to offer discounts to the hospitals which, in exchange, will pass savings on to the S.C. Medical Translational Technology Program (MedTransTech). Stryker will receive first rights to negotiate for licenses to technology developed with MedTransTech funding.
Merger & Acquisition and Strategic Initiative Highlights, January 2010 to May 2013 (continued)

- Premier Purchasing awarded agreements to Stryker and Zimmer to supply orthopaedic autotransfusion products to Premier’s acute care and continuum of care members.

2011
- TriMed reached an agreement to license its pin plate device to Stryker. The agreement covers U.S. Patent No. 5,931,839 and ends a four-year patent infringement suit.
- curasan signed an agreement with Stryker to market bone replacement and regeneration materials.
- Stryker Interventional Spine expanded its contract with Novation by adding the iVAS inflatable vertebral augmentation system product line to its U.S. agreement. Also in July, Stryker Joint Preservation entered into an exclusive collaboration with RegenLab SA to distribute Stryker’s RegenKit-THT. Finally, Corin commenced U.S. distribution of its Cormet Hip Resurfacing product. Corin and Stryker agreed to terminate their distribution agreement to transition to direct distribution.
- Stryker Orthopaedics and OrthoSensor entered into an agreement whereby OrthoSensor will provide the OrthoSensor Knee Trial, designed for use with Stryker’s Triathlon Knee.

2012
- NeuroLogica and Stryker Navigation will develop an integrated surgical navigation unit for NeuroLogica’s portable BodyTom 32-slice CT scanners. The companies’ platforms are used in a variety of procedures, including spine, trauma, neurosurgery, etc.
- Novation launched a new Orthopedic Standardization Program covering contracts for arthroscopy accessories, bone cement, casting/splinting, cement accessories, cold therapy, orthopaedic power tool accessories, bracing/soft goods, post-op autotransfusion, etc. To fulfill the program, new agreements were awarded to Breg, BSN Medical, DeRoyal, DJO, Medline, Össur, Stryker and Zimmer.

2013
- Stryker Orthopaedics and OrthoSensor extended their co-marketing agreement for use of VERASENSE intelligent instruments with the Triathlon Knee.
Significant Product Launches, January 2010 to May 2013

2010
- Rejuvenate Modular Primary Hip System
- U.S. launch of VertaPlex HV, a high viscosity bone cement for use in the treatment of vertebral compression fractures
- ADM X3 Mobile Bearing Acetabular System, a next-generation technology designed to reduce complications associated with total hip arthroplasty
- iVAS inflatable vertebral augmentation system
- VariAx Fibula and VariAx Foot Locked Plate Systems

2011
- Tissue-Preservation Hip Arthroscopy Platform, featuring IDEAL EYES high-definition visualization
- Added G-Lok implant to its VersiTomic portfolio for anterior and posterior cruciate reconstruction

2012
- ARIA Spinal System for minimally invasive transpsoas access
- ReUnion Total Shoulder Arthroplasty Modular System
- Performance Solutions for healthcare providers
- System 7, next-generation heavy duty surgical power tools for use in total joint procedures
- Stryker ADAPT, a computer-assisted surgery system for use with the Gamma3 Locking Nail in the treatment of hip fractures

2013
- Universal SMARTLock Hybrid MMF fixation system, combining elements of arch bars and maxillomandibular screws
- ICONIX all-suture anchor platform with IntelliBraid technology
- ES2 Spinal System, designed for 1-step percutaneous placement of the screw and retractor during minimally invasive surgical procedures

Significant Study Results, January 2010 to May 2013

2010
- Results from Stryker Orthopaedics’ Investigational Device Exemption study revealed no statistical difference in clinical outcomes between its mobile bearing and traditional fixed bearing knees. Further, lab tests demonstrated that the Triathlon Knee with X3 Advanced Bearing Technology exhibited a 97% reduction in total polyethylene volume loss vs. competitive mobile bearing knees. Stryker will not offer a mobile bearing knee system in the U.S. market.
- Findings from the National Joint Registry of England and Wales indicate that Stryker’s Triathlon Knee showed the lowest rate of revision at 3 years compared to other, frequently-used systems. Further, Triathlon demonstrated the lowest three-year revision rate in 2009.
Significant Regulatory Events, January 2010 to May 2013

2010
- Received notification from FDA that actions taken to address issues raised in a 2007 Warning Letter are sufficient, and no further formal corrective actions are required. Stryker had received the Warning Letter regarding compliance with certain quality system requirements at its reconstructive implant manufacturing facility in Mahwah, New Jersey in 2007.
- Resolved two FDA Warning Letters relative to quality system requirements at a reconstructive implant manufacturing facility in Cork, Ireland and compliance issues identified with a craniomaxillofacial product.

2011
- Received FDA 510(k) clearance for the MDM X3 Modular Dual Mobility Mobile Bearing Hip, an addition to its portfolio of technologies designed to minimize risks traditionally associated with hip replacement surgery and address a broader patient population.
- FDA sent requests to manufacturers including Biomet, Johnson & Johnson, Stryker and Zimmer to study whether their implants raise the level of metal in patients’ blood to dangerous levels.
- Stryker Orthopaedics received FDA 510(k) clearance for ShapeMatch Cutting Guides for use with the Triathlon Total Knee.

2012
- Authorities in New Zealand initiated a recall of the MITCH THR hip implant, following indications from registry data that suggest a higher-than-expected failure rate in the metal-on-metal device at three years post-op.
- Voluntarily recalled its Rejuvenate and ABG II modular-neck stems, reporting potential risks associated with fretting and corrosion at the modular neck junction.

2013
- Received notice that FDA has classified the company’s voluntary recall of its ShapeMatch Cutting Guides as Class I. The guides have not been available on the market since November 2012, and the recall does not affect the Triathlon Knee System nor Triathlon standard instrumentation.
### Stryker’s Orthopaedic-related 510(k) Clearances, January 2010 to May 2013

<table>
<thead>
<tr>
<th>Product/Year Cleared</th>
<th>510(k)</th>
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<tbody>
<tr>
<td><strong>2010</strong></td>
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<tr>
<td>AVA Navigator PEEK Spacers</td>
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<tr>
<td>AVS A-Lat PEEK Spacers</td>
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<td>AVS Align PEEK Spacers</td>
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<tr>
<td>IVAS Balloon Catheter</td>
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<td>Mantis Spinal System &amp; Mantis ReDuX Spinal System</td>
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<td>Modification To: Oasys System</td>
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<td>Modification To: Oasys System</td>
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<td>Modification To: Trio+Spinal Fixation System</td>
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<td>Modification To: Radius Spinal System</td>
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<td>Orthomap 3D 1.1 Module</td>
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<td>Series II X3 Large Diameter Acetabular Inserts</td>
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<tr>
<td>Stryker Arthroscope</td>
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<td>The Varia Fibula Locked Plating System Line Extension Addition Of Straight Plates</td>
<td>K102282</td>
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<td><strong>2011</strong></td>
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<tr>
<td>ABG II Monolithic Hip Stem</td>
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<tr>
<td>Aiming Blocks For Variax Distal Radius Plates</td>
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<td>Trio Trauma Spinal System</td>
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Stryker's Orthopaedic-related 510(k) Clearances, January 2010 to May 2013 (continued)

2012
3.9mm ReelX STT Suture Anchor System K120824
Anchor-L Lumbar Cage K120869
AVS AS PEEK Spacer K120486
Axsos Distal Lateral Femur TS Long Plates K122308
ES2 Spinal System K122845
Escalate Laminoplasty System K113802
Hoffmann 3 K122284
Hoffmann 3 Modular External Fixation System K111786
Hoffmann 3 Modular External Fixation System K121252
Hoffmann LRF (Limb Reconstruction Frame) System K113327
IVAS 20mm (10 Gauge) Balloon Catheter K113477
IVAS Balloon Catheter K113154
Oasys Spinal System K111719
Power Adaptor Instrument Accessory K120434
Shapematch Cutting Guide K122053
Stryker All Suture Anchors K120509
Stryker SDC3 HD Information Management System K121893
Variax Superior And Anterior Lateral/Midshaft Clavicle Plates, Aiming Blocks & Joystick K113760
Xia 3 Spinal System K113666
Xia 4.5 Spinal System K121342

2013
Axsos 3 Ti Locking Plate System K123964
Axsos Proximal Lateral Tibia Long Plates K123403
Gamma3 And T2 Recon Targeting Devices K123401
Hoffmann LRF (Limb Reconstruction Frame System) K130334
IVAS 10mm And 15mm Balloon Catheter K130430
Memory Metal Staples Easyclip K122113
Pelvis II Implant System K131132
Stryker Crossflow Arthroscopy Pump K123441
Stryker IVAS Balloon Catheter K123942
Superior Lateral Variax Clavicle Plate K130116
Triathlon Tritanium Tibial Baseplate K123486
Variax 2 Compression Plating System K130009
Significant Legal Developments, January 2010 to May 2013

2010
- A Federal judge dismissed a lawsuit against Stryker and Howmedica Osteonics over an allegedly defective Trident Hip System, ruling that Federal law preempts the suit.
- A Federal judge in Michigan tossed a whistleblower lawsuit against Stryker that accused the company of a kickback scheme, ruling that the suit failed to provide sufficient evidence to support accusations, and allowed plaintiffs a 21-day window to address deficiencies in their complaint.
- A Federal court dismissed a lawsuit accusing Howmedica Osteonics of manufacturing a defective knee implant, citing a failure to demonstrate “either a design defect or the existence of inadequate warnings.” The court also ruled that package inserts constituted sufficient notice of risks associated with the Duracon Total Knee.
- Stryker and Wright Medical requested dismissal of a ten-year-old patent infringement suit related to knee devices. In 2000, Howmedica Osteonics accused Wright of violating a patent with its Advance knee implant.
- A Federal court ruled that preemption does not apply in a product liability suit brought against Stryker in 2009, which alleged that the company “failed to comply with FDA regulations in manufacturing the Trident System.”
- A Federal appeals court reversed a lower court’s ruling of invalidity for TriMed’s wrist fracture fixation device patent (U.S. Patent No. 5,931,839), and ordered that an infringement suit against Stryker be assigned to a different judge.
- Stryker Biotech is ordered to pay $1.35 million to resolve allegations that it marketed OP-1 Implant and OP-1 Putty bone morphogenetic protein products for off-label use, and misled healthcare providers on appropriate uses of its products.
- During 3Q10, received two subpoenas from the U.S. Department of Justice related to sales and marketing of the Stryker PainPump and to sales, marketing and regulatory matters relative to the OtisKnee.
- Filed a patent infringement suit against Zimmer, claiming infringement of three U.S. patents by Zimmer’s Pulsavac Plus wound debridement system.

2011
- Synthes filed a suit against Stryker, alleging that Stryker seeks to obtain an improper competitive advantage in the industry for medical implants and instruments used in spinal surgery. The suit also accused three former Synthes employees of misappropriating trade secrets and breach of obligations.

2012
- Stryker Biotech reached a settlement with the U.S. Attorney’s Office, agreeing to pay a fine of $15 million and plead to a misdemeanor charge relative to 13 felony charges brought against the company in a 2009 Federal grand jury indictment.
- A Federal court will file a motion to dismiss an indictment of the former president of Stryker Biotech on charges of marketing an unapproved combination of OP-1 protein and Calstrux bone void filler.
- Reported entering into a discussion with the U.S. Department of Justice regarding potential settlement of a 2010 subpoena related to sales and marketing of the OtisKnee. The company offered $33 million in a potential resolution of the matter.
Significant Legal Developments, January 2010 to May 2013 (continued)

2013

- Prosecutors are investigating allegations that Stryker offered bribes to 50 hospitals in Poland to secure deals between 2003 and 2006.
- A U.S. District Court ordered Zimmer to pay $70 million to Stryker to settle infringement claims regarding U.S. Patent Nos. 6,022,329, 6,179,807 and 7,144,383, addressing pulsed lavage irrigation devices used during orthopaedic surgery. The court found that Zimmer’s Pulsavac products willfully infringed upon Stryker’s Surgilav and InterPulse devices.
- AngleFix Tech filed suits against Smith & Nephew and Stryker alleging infringement of U.S. Patent Number 6,955,677, which covers an apparatus and method for multi-angle fastening of bone plates.

Other Locations

Stryker Orthopaedics (Reconstructive, Joint Preservation, & Orthobiologics)
325 Corporate Drive
Mahwah, New Jersey 07430
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Phone 201-831-5000

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Stryker Spine
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Stryker Foot and Ankle
6060 Poplar Avenue
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Memphis, Tennessee 38119
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Phone 866-682-7577
Company Leadership

President and Chief Executive Officer
Kevin A. Lobo

Vice President, Communications, Public Affairs and Strategic Marketing
Yin C. Becker

Vice President, Strategy and Investor Relations
Katherine A. Owen

Vice President and Chief Compliance Officer
Anne L. Mullally

Vice President, Chief Financial Officer
William R. Jellison

Vice President, Chief Medical and Scientific Officer
Scott P. Bruder, M.D., Ph.D.

Vice President, Regulatory Affairs and Quality Assurance
Elizabeth A. Staub

Group President, Global Quality and Operations
Lonny J. Carpenter

Group President, Orthopaedics
David K. Floyd

Group President, MedSurg and Neurotechnology
Timothy J. Scannell

President, Reconstructive
William J. Huffnagle

President, Osteosynthesis
Vivian Masson

President, Spine
Spencer S. Stiles

ORTHOWORLD Observations

Looking Ahead

- Expects 2013 reconstructive growth to lie in low-single-digits
- Overall 2013 growth expected to be in range of 3% to 5.5%
- Experiencing strong double-digit growth in emerging markets, to be further bolstered by Trauson acquisition
- ~6% of overall revenue arises from emerging markets

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