



THE POWER OF US

ADVANCING ORAL HEALTH AS PRIMARY CARE

ROLF STEFFEN



ASIA MARKET CHANGES – A SIGNIFICANT GROWTH OPPORTUNITY

Continued Strong Economic Growth¹

GDP Growth 2019

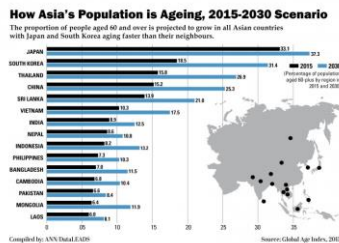
- East Asia 5.7%
- South East Asia 5.2%
- South Asia 7.2%



Aging Population

Population aged > 60 years by 2030

- Japan > 37%
- China > 25%



Increased Awareness of Importance of Oral Health

Example – 2030 Health Plan of State Council of China



Growth in Esthetic Dentistry

- Rising disposable Income
- Consumer Awareness



HENRY SCHEIN – OUR PRESENCE IN ASIA



Hong Kong – 2008

China – 2011

- + Henry Schein Sunshine Beijing – 2012
- + Henry Schein Hemao Guangzhou – 2016
- + Henry Schein Lixue Zhejiang – 2017
- + Henry Schein Wuhan Hongchang – 2019

Thailand – 2012

Japan – 2014

- + Expansion in 2016

Singapore – 2018

FOLLOW HENRY SCHEIN'S HIGH-TOUCH, VALUE-ADDED MARKET APPROACH



EDUCATION

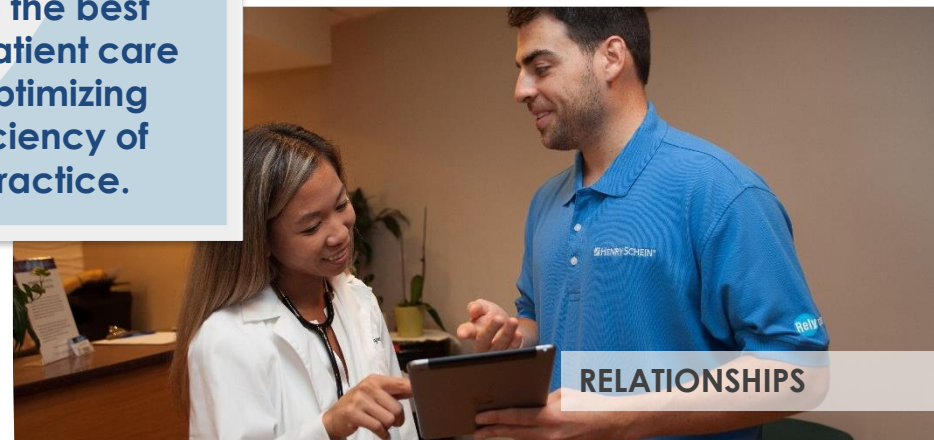
Our strategy is focused on delivering solutions that enable our customers to provide the best quality patient care while optimizing the efficiency of their practice.



SERVICE & SUPPORT



SOFTWARE & INNOVATION



RELATIONSHIPS

OUR GLOBAL DENTAL STRATEGY – IMPLEMENTATION IN ASIA



Customer Success through "One Dental"

Focus on solutions that meaningfully enhance our customers' business and clinical outcomes

Strategic Growth

- Develop national platform in China
 - Expand Henry Schein ConnectDental® business SEA
 - Review opportunities in other markets

Maximize Henry Schein's Overall Brand

Implant and Endodontic franchises in China

Organizational and Process Design

Improve our efficiency and effectiveness, freeing up resources for investment and profitable growth