

Berlin, September 15, 2008

A close-up photograph of a person wearing a white lab coat and a blue surgical cap. The person's right hand is raised, with the index finger pointing towards a glowing blue button that has the text "Look forward!" written on it in white. The background is a soft, out-of-focus light blue.

Look forward!

**New stimulus
for innovation and growth**

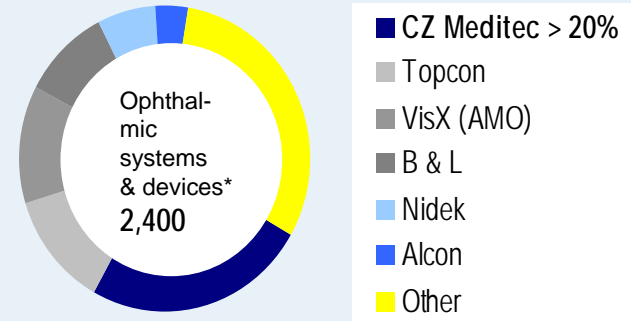
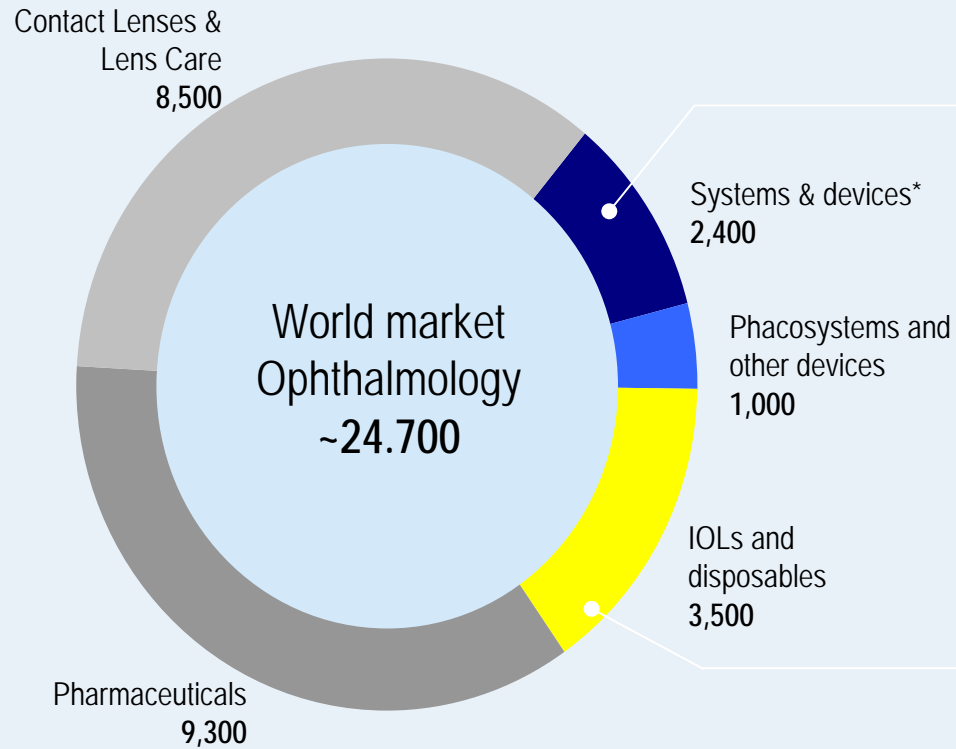
**Our markets
Ulrich Krauss, Member of the Board**

World market Ophthalmology:

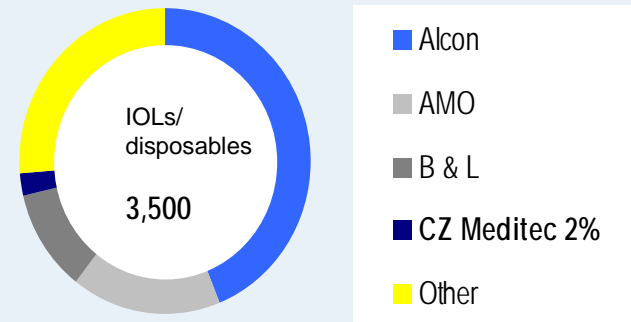
Growth perspective for intraocular lenses and disposables



World market:



Growth: ~ 10%
No competitor with market share > 16%

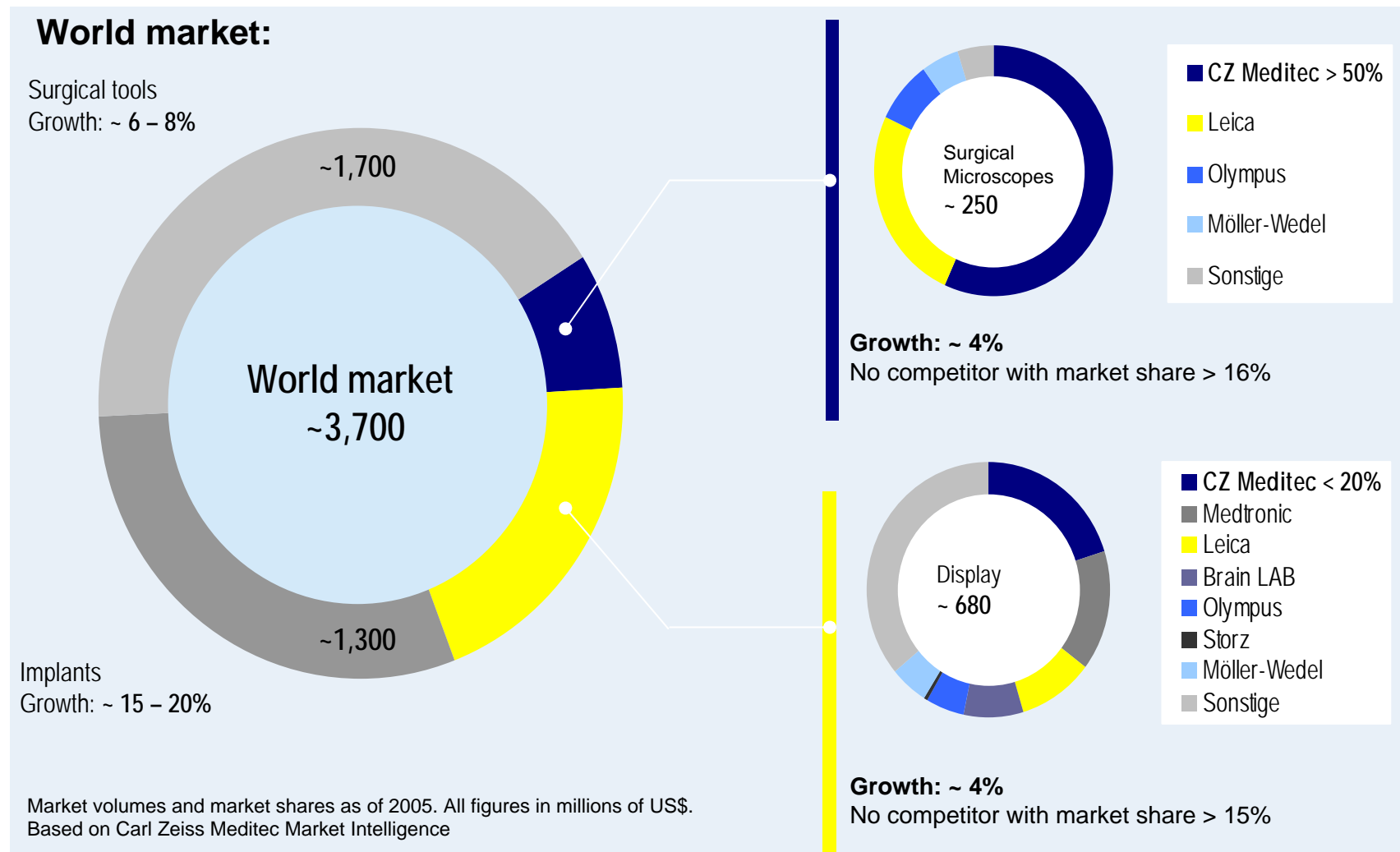


Growth: ~ 10%
Alcon dominant player,
no other competitor with market share > 15 %

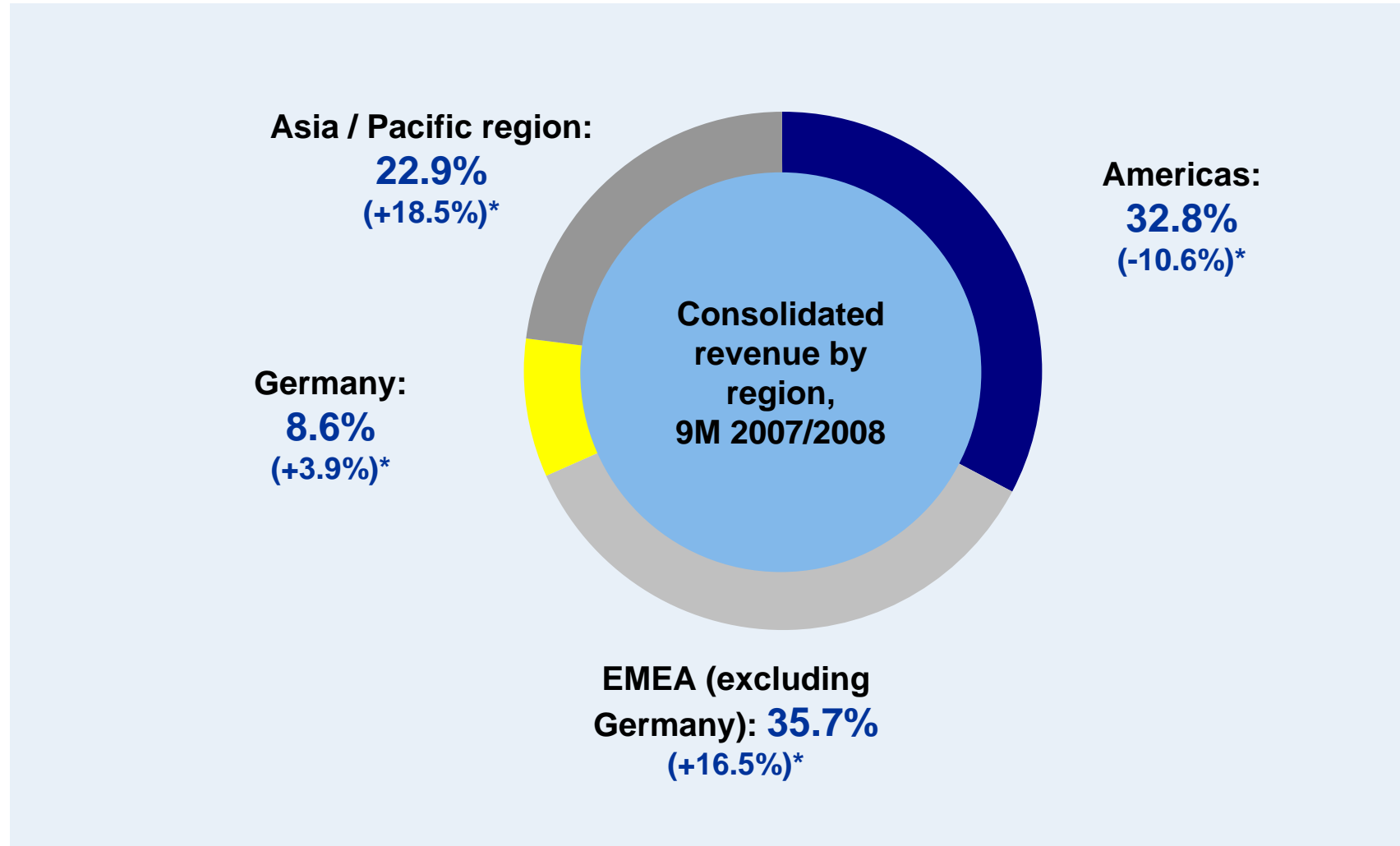
* Includes: Diagnostic systems, laser treatment systems and surgical microscopes
Market volumes and market shares as of 2007. All figures in millions of US\$.
Source: Based on Carl Zeiss Meditec Market Intelligence

World market Microscopes and visualization solutions

Market leader in both segments



Our regional distribution



* Like for like growth rate vs previous year

Our customer groups

Eye specialists and optometrists



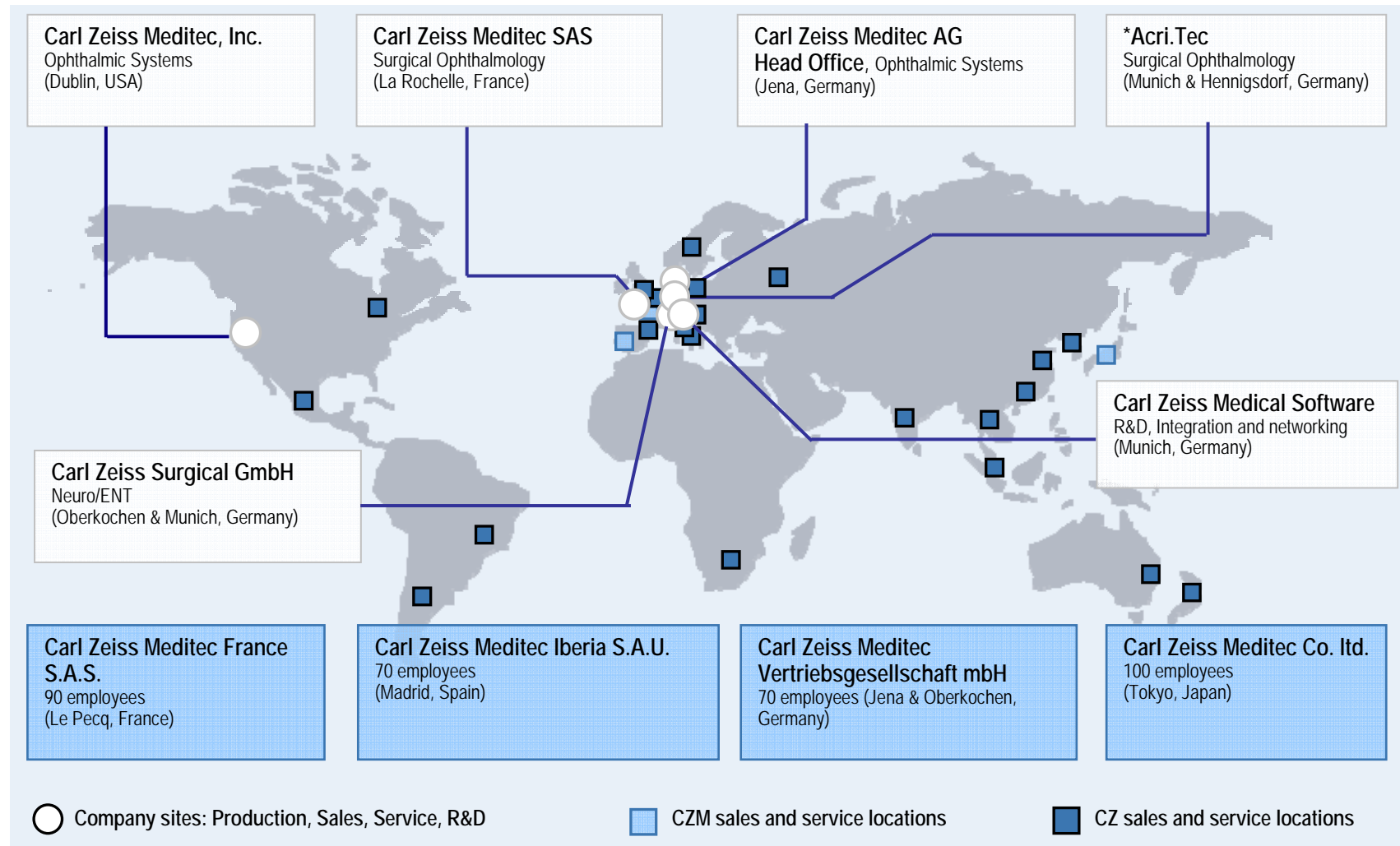
Ophthalmic surgeons



Neurosurgeons and ear, nose and throat surgeons

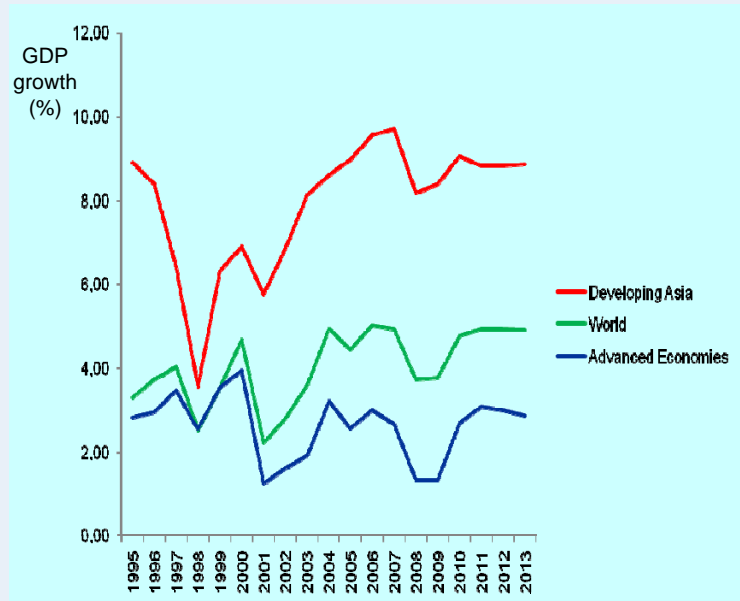


Carl Zeiss Meditec has a global presence and a powerful distribution organization



Challenges in distribution

APAC region as an example



New driving force

The major emerging markets have become the main engines of world growth. For the first time, China and India are making the largest country-level contributions to global growth.

(based on PPP weights, percent of world growth)



Source: IMF staff calculations.

APAC, with India and China in particular, have become global growth engines



Challenges in distribution

APAC region as an example

Some important questions

- How to increase „**share-of-wallet**“ with existing customers?
- How to find **new customers** and what will be done to convert them to Zeiss?
- Which are the „**must-have**“ **products & applications**?
- Which **changes to the value chain** are required?
- How does the future **organizational set-up** will have to look like in APAC?
 - Research & Development ?
 - Sourcing & Manufacturing ?
 - Marketing & Sales ?
 - Service Support ?

Thank you for your attention...

