

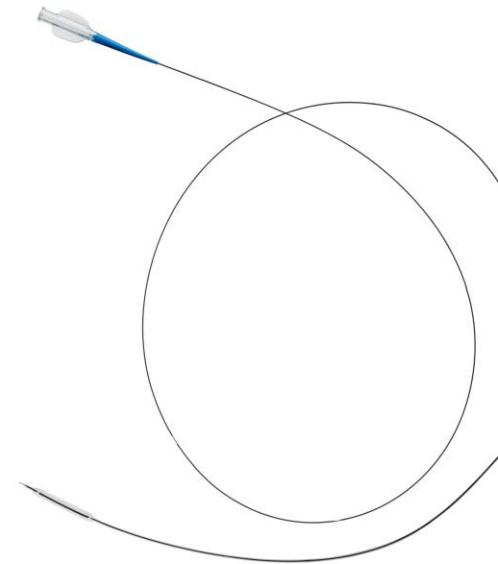
Overview of CR Med Sector

June 09, 2021

EVERY CONNECTION COUNTS



CREGANNA
MEDICAL
is part of



MEDICAL - LEGACY OF INNOVATION

PARTNER OF CHOICE FOR THE DESIGN AND MANUFACTURING OF MEDICAL DEVICES

4,000+
EMPLOYEES

450+
ENGINEERS

120+
PATIENTS P/MIN

1,500+
CUSTOMERS



Precision metal components and advanced medical device tubing



Access and delivery solutions for minimally invasive devices



FEP heat shrink tubing



Access and delivery solutions for minimally invasive devices



Broad portfolio of sensors and sensor-based systems



Fine wire and high performance medical cable assembly



Connectors and electro-mechanical components



Material science and heat shrink tubing

GLOBAL PARTNER WITH LOCAL SUPPORT



CR Value Proposition

People & Tech

- Highly Qualified Workforce
- Extensive Med Device Experience
- Multiple Mfg. Tech's
- Process & Product Development Capabilities

Cost

- Competitive Cost
- Productivity Drive
- Free Trade Zone
- Active Medical Cluster



Business Climate

- Stable Political & Business Environment
- Safe Place to Live

Location

- Customer Proximity
- Free Trade Agreements with major commercial partners (US, EU, UK, China, South Korea, NAFTA, South America)
- Logistics

FOSTERING GROWTH OF HIGH-TECH LIFE SCIENCES OPERATIONS

- #1 Medical Devices company operating in Costa Rica
- 12 of the top 30 MD global companies have established manufacturing operations in 14 different subsectors
- 8 of these are some of the top 20 exporters in CR, representing \$2,699 million in MD exports in 2019 (73% of total)

**'21 YTD Exports 32% above
'20 same period**

Baxter

**Boston
Scientific**
Advancing science for life™

Edwards

Abbott

TERUMO

Medtronic

HOLOGIC®

PHILIPS

CardinalHealth

STERIS

3M

Smith+Nephew



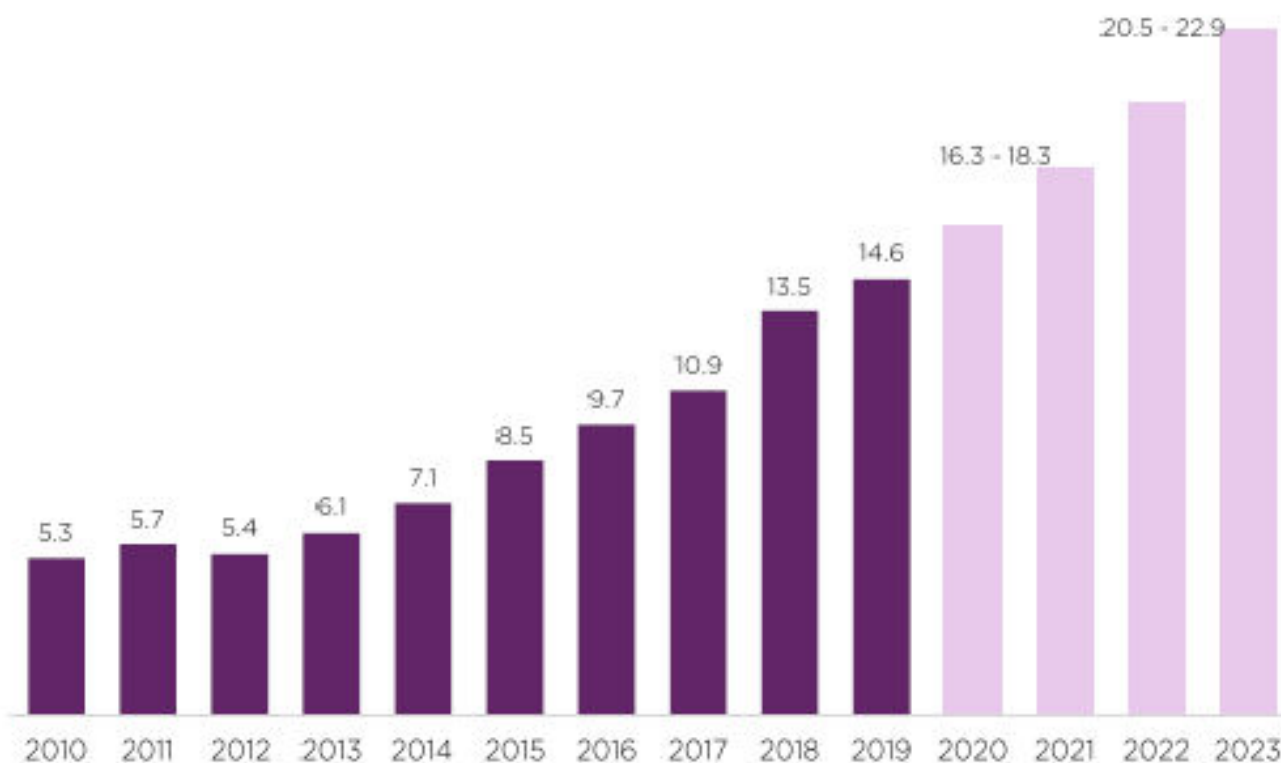
TECHNICAL HIGH SCHOOLS



+ 14,500 graduates in 2019

- 224 institutions
- +47,000 students enrolled on service-related specialties
- 54 different specializations in 3 areas of expertise (services, industrial, and agribusiness)
- Technical High Schools have one more year than regular academic institutions (Total = 6 years)
- Some specializations: Accounting, Banking & Finance, Computer Programming, Electromechanics, Electronics, Graphic Design, Industrial Electronics, Industrial Maintenance, Logistics and Distribution, Network Informatics, Precision Mechanics, Production and Quality Control, Software Development Informatics, among others

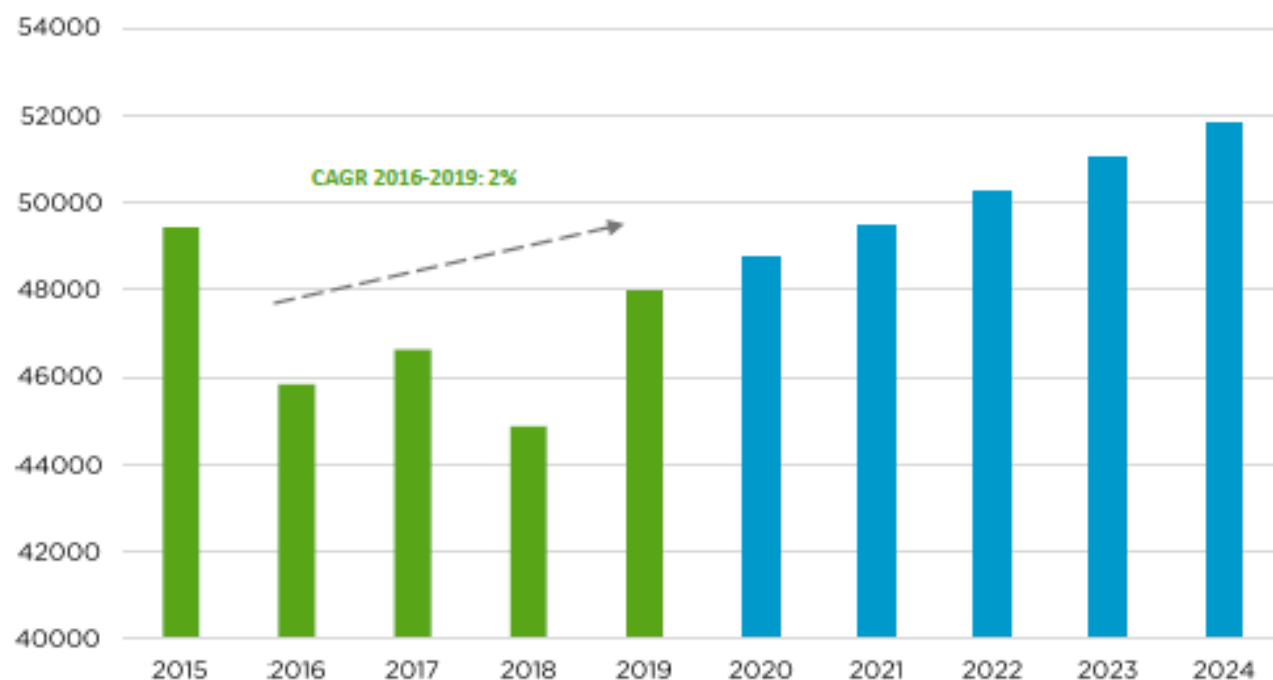
Technical High School graduates
(thousands)



UNIVERSITIES

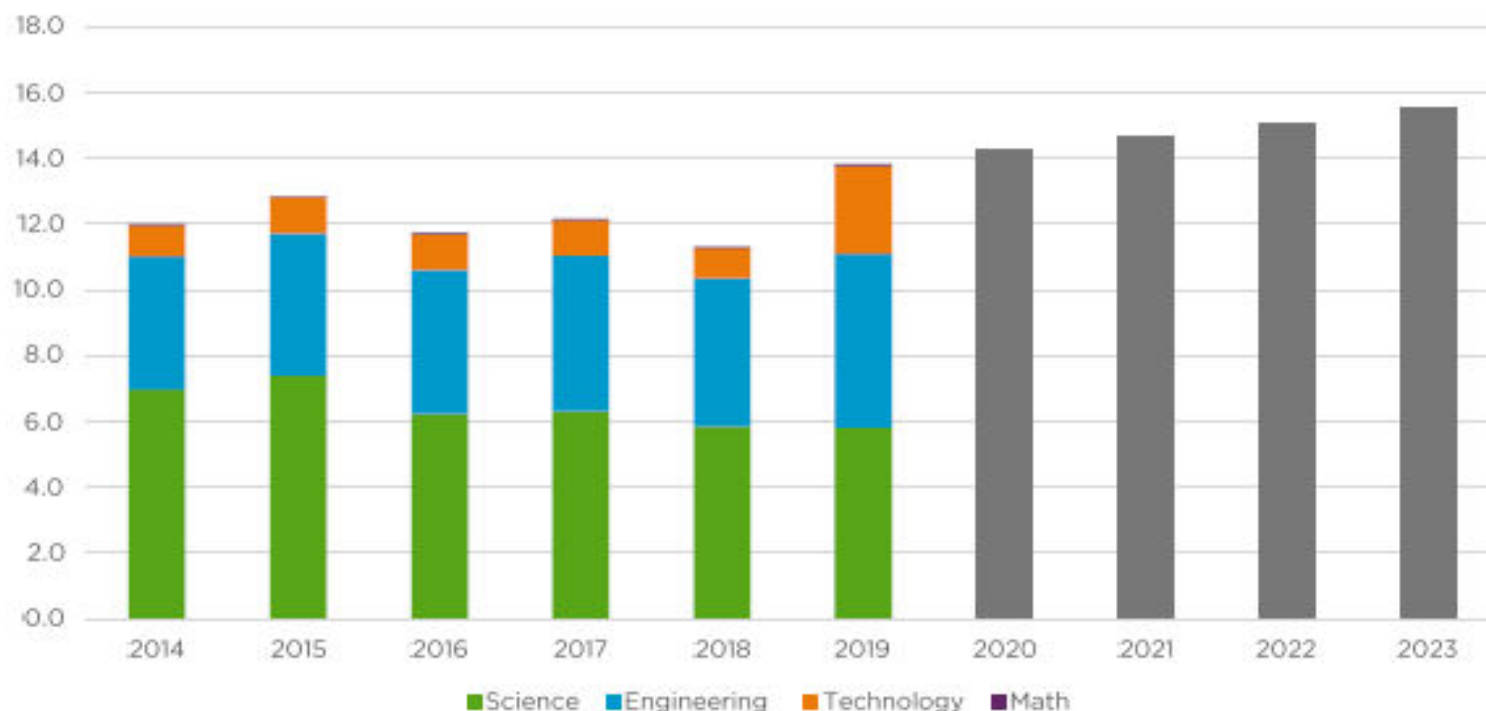
- Total of 63: 5 public, 58 private
- Public Universities:
 - Universidad de Costa Rica
 - Instituto Tecnológico de Costa Rica
 - Universidad Nacional
 - Universidad Estatal a Distancia
 - Universidad Técnica Nacional
- Private Universities:
 - ULACIT
 - Universidad Creativa de Costa Rica
 - Universidad Fidelitas
 - Universidad Hispanoamericana
 - Universidad Internacional de las Américas
 - Universidad Latina
 - Universidad Veritas
 - Universidad CENFOTEC
 - UCIMED, UNIBE (Specialized in Medical and Life Sciences)

University graduates,
2015-2019



STEADY FLOW OF STEM GRADUATES

STEM Graduates
(thousands)



Notes:

2020-2023 Forecast

Math includes Statistics

Science includes Basic and Health Sciences

Engineering includes Natural Resources related careers

Source: CINDE based on data from CONARE, 2020

- ✓ Steady supply of qualified human capital: nearly 14,000 university graduates in 2019
- ✓ ~15,500 STEM graduates by 2023
- ✓ Prepared human capital to work in a global environment
 - High level of English proficiency. Costa Rica ranks 2nd in LATAM in the English Proficiency Index

Notes: 2020-2023 Forecast

Building a robust ecosystem of suppliers

SUPPLIERS BY SERVICES AND PRODUCTS



CONTRACT MANUFACTURING SERVICES

8 Contract Manufacturers providing from concept and design to manufacturing, assembly, packaging and supply chain and sterilization management.



ELECTRONIC MANUFACTURING SERVICES

+19 Vendors offer from component manufacturing including harnesses, sensors, passive & active components, connectors and cables, switches to full manufacturing services of PB Board assembly, electro-mechanical assembly and other electronic like technologies.



PRECISION MACHINING & TOOLING

+23 Tool Shoops making precision components, device & instrument subassemblies for Orthopedic, Spine, Cardiovascular and other applications using CNC turning and milling, Swiss machining, EDM, laser welding, marking and cutting, grinding, stamping, heat treatment, mold fabrication, repairs, etc.



STERILIZATION

Steris and Sterigenics offering E-Beam & EO services, biological indicators test and distribution.



MOLDING

7 Suppliers capable of providing plastic and silicone molding, insert molding, over molding, sheeting, among other services in a clean room environment.



EXTRUSION

3 Vendors offering medical grade tubing such as single lumen, multi lumen, shrink tubing, braided reinforced and profiles in both silicone and plastic.



MANDRELS AND WIRES

4 Strategic Suppliers offer profile and surface grinding, deburring, coiling, coil winding, wire forming, electro polishing, machining, among other services.



SPECIAL COATINGS

3 Providers of PTFE, Parylene, Electrodeposition and other types of coating required by the industry.



PACKAGING SOLUTIONS & PRINTED MATERIALS

+12 Vendors
Services include: corrugated boxes, pouches, plastic bags, trays, folding cartons, coil dispensers, labels, IFUs, inserts, etc.



SPECIAL FINISHINGS

+11 Vendors offering electro polishing, plating, coating, texturing, anodizing, passivation, heat treatment, laser marking, grinding.



CLEAN ROOM SERVICES & SUPPLIES

18 Vendors
Services include: consumables, certified laundry, janitorial & cleaning, chemicals, equipment, among others.



SUPPORTING SERVICES

+12 Providers offering gauging & calibration, microbiology tests, validation tests, process validation, etc.

- *ISO 13485*
- *ISO 9001*
- *ISO 14000*
- *5S PROGRAM*
- *WAREHOUSE MANAGEMENT SYSTEM (WMS)*
- *VENDOR MANAGED INVENTORY (VMI)*
- *CLEANROOM OPERATION CONDITIONS*
- *ESENCIAL COSTA RICA / COUNTRY BRAND*

