AIR LIQUIDE HEALTHCARE IS A WORLD LEADER IN:

- Medical gases,
- Home healthcare,
- Hygiene products & healthcare specialty ingredients

We aim to provide customers in the continuum of care from hospital to home with medical products, specialty ingredients and services that contribute to protecting vulnerable lives.
A dedicated team of 12,000 employees around the world influence the lives of more than 1 million patients at home and serve over 7,500 hospitals and clinics.

Air Liquide Healthcare is present in more than 30 countries.

There are thousands of reasons for us to be a major player in healthcare... 

... and each one touches a life somewhere.
FAST AGEING POPULATION

The world’s population aged 60 and over is set to nearly **double by 2050**

The number of people over 60 is expected to reach **2 billion**

It will represent **22%** of the population

This will be true all over the world, not just in developed countries

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RAPID URBANIZATION

By 2050, 70% of the global population will live in cities\(^1\)

Urbanization brings: pollution, industrialized food chains, and sedentary lifestyles with little physical exercise.

Urban lifestyles generate a rapid rise in obesity

1 billion obese adults by 2030\(^2\)

And obesity generates a rise in disease like sleep apnea and diabetes.

The prevalence of obesity has also seen a dramatic increase in developing countries such as China and Brazil, where 30% to 40% of the population is obese\(^3\)

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\(^3\) Harvard School of Public Health. Obesity Prevention source web.
RISE IN CHRONIC DISEASE

Worldwide, chronic disease is by far the leading cause of mortality, representing 63% of all deaths\(^1\).

80% of deaths from chronic disease occur in low- and middle-income countries\(^1\).

More than 75% of healthcare costs in the United States are due to chronic conditions\(^2\).

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THE DIABETES PANDEMIC

382 million people worldwide suffer from diabetes\(^1\). This number is predicted to reach more than *500 million* by 2030

Type 1 diabetes represents around *10%* of all diabetes cases

79,000 children develop type 1 diabetes every year\(^1\)

**Type 1** diabetes (insulin-dependent diabetes) is characterized by deficient insulin production and requires daily administration of insulin

**Type 2** diabetes results from the body’s ineffective use of insulin

\(1\) International Diabetes Federation http://www.idf.org/sites/default/files/EN_6E_Atlas_Full_0.pdf
INCREASING RESPIRATORY DISORDERS – COPD

Chronic Obstructive Pulmonary Disease (COPD) patients with many more undiagnosed1

Globally, COPD is the 4th highest cause of death and is forecast to become 3rd by 20302

Over 1 million patients with severe COPD worldwide are treated using long-term oxygen therapy3

In the European Union, COPD is the leading cause of lost work days among respiratory diseases4

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3 Doherty DE and al. Recommendations in the 6th long-term oxygen therapy consensus conference. Respir Care 2006; 51(5):519-25
INCREASING RESPIRATORY DISORDERS – SAS

Sleep Apnea Syndrome (SAS) affects 1 to 6% of the world’s adult population\(^1\)

8 out of 10 people who suffer from sleep apnea are unaware of their condition\(^2\)

In Canada, sleep apnea affects around 858,900 adults\(^3\)

In France, 368,000 sleep apnea patients are treated using Continuous Positive Airway Pressure (CPAP)\(^4\)

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At any given time, hospital-acquired infections are estimated to affect 1.4 million people worldwide, causing longer hospital stays and increasing the risk of mortality.

Between 5% and 10% of all patients admitted to hospitals in developed economies acquire nosocomial infections.

In some developing countries, the proportion affected can exceed 25%.

Over 100,000 deaths each year worldwide are caused by hospital-acquired infections.

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1 The World Health Organization http://www.who.int/gpsc/background/fr/index.html (in French only)
Nosocomial infections are a major public health challenge, often caused by multi-resistant bacterial pathogens. A single hospital-acquired infection means increasing distress and risks for the patient and additional costs for the community, of about €6,000 to €10,000 per case.

With no significant commitment to antibiotic development in this environment, infection control and prevention are, in my eyes, of the highest importance to fight the problem.

**Adequate disinfection is essential to prevent transmission of microorganisms.**

Prof. Reinier Mutters  
*Institute for Medical Microbiology and Hygiene, Marburg, Germany*
ECONOMIC DEVELOPMENT GENERATES HEALTHCARE SPENDING

In the USA, healthcare spending accounts for 17.7% of GDP, and in Europe it averages 10% of GDP.

In emerging countries, it represents 8.9% of GDP in Brazil and 5.2% of GDP in China.

In Asia, it goes from 2 to 6.8% of GDP.

④ The World Health Organization  http://gamapserver.who.int/gho/interactive_charts/health_financing/atlas.html
A HOST OF NEW TECHNOLOGIES

The global market for home health monitoring technology was worth approximately €7.6 billion in 2010.

The most common conditions being monitored today are chronic diseases including diabetes, cardiac arrhythmia, sleep apnea, asthma and chronic obstructive pulmonary disease.

e-Health can change and challenge our models of how we can improve patient care, and create value for healthcare professionals. In 2013, more than 43,000 health and fitness or medical apps were available for iPhone users.

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AIR LIQUIDE HEALTHCARE IS THE EUROPEAN HOME HEALTHCARE LEADER

We care for patients with our specific expertise in:

**Respiratory**

- Long-term oxygen therapy for very severe Chronic Obstructive Pulmonary Disease (COPD)
- Continuous Positive Airway Pressure (CPAP) for sleep apnea
- Home Mechanical Ventilation for chronic respiratory failure

**Infusion**

- Diabetes
- Orphan diseases: pulmonary arterial hypertension, cystic fibrosis,
- Cancers
- Nutritional deficiencies
- Pain
- Parkinson’s Disease
- Immunodeficiency
Over
1 million
patients in more than 30 countries

We take care of over 1 million patients at home worldwide to improve their quality of life.

All over the world, healthcare professionals place their trust in our international brand VitalAire, or in one of our local brands.
AIR LIQUIDE HEALTHCARE IS A KEY PLAYER IN HOSPITAL CARE

We supply more than 7,500 hospitals and clinics around the globe with gaseous drugs and associated services.

For respiratory infections or intensive care
- Medical Oxygen O₂

In anesthesia /analgesia
- Nitrous Oxide N₂O
- Oxygen / Nitrous Oxide premix O₂ / N₂O (Kalinox™)
- Xenon (Lenoxe™)

In resuscitation
- Nitric Oxide (Kinox™ and Vasokinox™)

We provide delivery and monitoring systems for medical gases.

We produce medical equipment for respiratory assistance in emergency rooms, recovery rooms, intensive care units and patients’ own homes.

Every 10 seconds, AIR LIQUIDE HEALTHCARE supplies a cylinder of Medical Oxygen somewhere in the world.
Every 10 seconds, Air Liquide Healthcare supplies a cylinder of medical oxygen somewhere in the world.

The elimination of hospital-acquired infections is a major public health issue. In this battle, prevention is fundamental.

Through its hygiene brand Schülke, Air Liquide Healthcare helps fight infections and pandemics, using a broad range of disinfectants and antiseptics.

Nurses wash their hands between 8 and 20 times a day.
Air Liquide Healthcare develops specialty ingredients through its brand SEPPIC

SEPPIC offers a comprehensive portfolio of leading products:

• polymers, natural emulsifiers, excipients and active ingredients for the personal care market
• adjuvants for livestock and therapeutic human vaccines
• functional coatings and natural active ingredients for the pharmaceutical industry
Air Liquide Healthcare’s Research & Development (R&D) strategy is founded on innovation. Thanks to innovation, we develop new products and services in anticipation of patients’ needs, helping to ensure the continuum of care.

Our areas of R&D expertise include:

- Medical gases
- Chronic or acute respiratory illnesses
- Technologies and medical equipment
- The fight against nosocomial infections
- Healthcare Specialty Ingredients

A team of over 250 researchers
“Protecting vulnerable lives”

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