Some statements in this presentation may be forward-looking statements within the meaning of the Private Securities Litigation Reform Act of 1995, including, without limitation, statements regarding our performance in high growth emerging markets, continuing innovation and new products and technologies, our new focus on lab to clinic solutions, continuing and emerging leadership positions in various markets, continued growth in various markets, improving operating margins, expectations with respect to recurring revenue, and our future financial performance. Forward-looking statements generally can be identified by the use of forward-looking terminology such as, “anticipate,” “believe,” “expect,” “assume,” “continue,” “well positioned” “may,” “will,” “intend,” “estimate,” or similar expressions or the negative of those terms or expressions, although not all forward-looking statements contain these words. These statements are subject to risks, uncertainties and other factors that could cause actual results to differ materially from our expectations. Such factors include, but are not limited to, recent changes to our global organizational structure and executive management team, difficulties in implementing our global ERP system, our ability to develop and market new or improved products according to our business plan, currency fluctuations and other factors discussed in more detail in our recent filings with the Securities and Exchange Commission. The forward-looking statements contained in this presentation reflect our views and assumptions only as of the date of this presentation. We do not undertake any obligation to publicly update any forward-looking statements.
Bio-Rad Today

65+ Years Strong Performance

$2.2B+ Annual Sales

8,200+ Employees Worldwide

Continuous Innovation
A History of Contribution

Key Competencies
Fueling Ongoing Growth

Complementary Business Mix
Leveraging Across the Company

Advance discovery. Improve lives.
Bio-Rad Global Profile

**Customers**
- Hospital Labs: 38%
- Reference Labs: 13%
- Transfusion Labs: 12%
- Applied: 3%
- BioPharma: 11%
- Academic: 23%

**Geography**
- EMEA: 35%
- Americas: 44%
- Asia: 21%

**Products**

- Diversified Customer Base
- Worldwide Presence
- Broad Product Base

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A History of Innovation

1967: Bio-Rad launches first T-4 by column test revolutionizing Thyroid testing

1972: Electrophoresis grade chemicals are introduced

1982: First commercial test for Hemoglobin A1c

2000: Launched the first 4-color real time PCR platform on the market

2006: Place first multiplex immunoassay system BioPlex 2200

2012: Bio-Rad launches the droplet digital PCR system

2019: Bio-Rad launches the first FDA cleared droplet digital PCR test to monitor levels of BCR-ABL in cancer

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Leadership Positions

Market Focus

Bio-Chromatography
Electrophoresis
Gel image
Protein Assay
Digital Biology

Diabetes
Infectious Disease
Blood Typing
Quality Control

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Bio-Rad is Well-Positioned in New Focus on Lab to Clinic Solutions

Translational Research Continuum

**Discovery**
- Basic disease mechanism research
- Pathway research
- Target identification

**Development**
- Target validation
- Lead development of a therapy and/or diagnostics
- Pre-clinical studies

**Production**
- Clinical studies
- Regulatory
- Drug and/or diagnostics mfg. & commercialization

**Treatment & follow up**
- Treatment planning and monitoring
- Post-market surveillance

Genomics, Cell Biology, Proteomic, Software & Informatics

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Life Science Profile

**Highlights**
- Market Size: $45B–50B
- Market Growth 4% CAGR
- Addressable Market: $8–9B

**Customer Segments**
- Research 63%
- Applied Markets 7%
- BioPharma 30%

**Revenue Geography**
- Asia 26%
- Americas 43%
- EMEA 31%

**Products**
- Consumables 48%
- Instruments/Apparatus 52%

Source: Bio-Rad Internal

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Life Science Solutions

Genotyping & Gene Expression (PCR & qPCR)

Gene Transfer & Modulation

Protein Purification (chromatography)

Protein Expression (multi-analyte detection)

Gene Transfer & Modulation

Protein Purification (chromatography)

Protein Expression (multi-analyte detection)

Cell Sorting & Analysis

Cellular Imaging

Antibodies

Protein Quantification (western blotting)

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**New Entrant in Growing Market**

- Flow Cytometry Cell Sorters and Analyzers
- Cell Imagers and Counters
- Flow Cytometry Reagents & Assays
- Flow Cytometry Antibodies

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The power of partitioning:

- Increased Sensitivity
- Increased Precision
- Absolute Quantification
Digital Biology – Platform Evolution

900+ Clinical Research publications

1000+ pre-designed validated assays

FDA Cleared Solution, offering open mode flexibility

BCR-ABL FDA Cleared Assay

Bio-Rad’s Direction with Clinical Applications

Oncology
NIPT/Genetics
Reference Standards
Infectious Diseases

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Digital Biology – Platform Evolution

2013
QX200™ ddPCR Platform
A foundational platform ultimately defining the market standard for digital PCR.

2014
AutoDG™ Instrument
Automated droplet generator with a simplified workflow and higher capacity

2015
QX200™ ddPCR Platform (CE-IVD)
The first Droplet Digital PCR in the diagnostics market

2017
ddSEQ
Droplet platform for rapidly growing single cell NGS market

2019
QXDx Auto DG System
FDA cleared for use in Clinical Diagnostics enabling LDT or cleared assay testing

2020
QX ONE™ ddPCR System
Hands free, integrated multiplexing platform designed for high volume biopharma market

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QX ONE
Droplet Digital PCR System

- Automated, Walk Away Operation
- Easy to Use
- Advanced Multiplexing
- Regulatory Compliance
- High Quality Data
Accuracy is critical in the exploding Cell and Gene Therapy arenas

- Verifying accuracy in process development
- Used for acceptance testing in manufacturing QC
- Confirming gene edit accuracy (CAR-T)
- Assuring dosing accuracy for patients
- Identifying residual DNA to verify therapeutic purity
- Monitoring of patients for long term efficacy
2D Genomics: Novel entry into Sequencing Library Prep

Total RNA Kit
• Supports either single cell or bulk RNA experiments
• Simple, rapid workflow
• Captures all RNA biotypes in a single library prep
• High sensitivity with picogram sample input
• Even coverage across transcripts

Life Science - Acquisition

SEQuoia Complete Stranded RNA Library Prep Kit
Clinical Diagnostics Profile

**Highlights**
- Market Size: $55-60B
- Addressable Market: $5.5B
- Market Growth ~ 5%

**Customer Segments**
- Transfusion Laboratory: 18%
- Hospital Laboratory: 61%
- Reference Laboratory: 21%

**Revenue Geography**
- EMEA: 39%
- Americas: 42%
- Asia: 19%

**Products**
- Instruments: 25%
- Reagents: 75%

Source: Bio-Rad Internal

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Clinical Diagnostics

Diagnostic Testing and Monitoring
- Diabetes
- Infectious Disease
- Autoimmune
- Transfusion Compatibility

Protecting the Blood Supply
- Blood Typing
- Blood Virus Screening
- HIV Confirmation Testing

Quality Assurance
- Quality Controls
- Quality Assessments
- Data Management

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Blood Typing

Highlights
- Bio-Rad #2 in Market
- 4,000+ Automated Systems Placed
- Unrivalled Results Management
- Broadest portfolio for safe transfusions

Tango infinity

IH-500

IH-Com & IH-Web Results Management

IH-1000

Gel Cards

Advance discovery. Improve lives.
Expanding the US Blood Typing Portfolio

IH-1000  →  IH-500  →  IH-READER 24

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Expanding Our Quality Control Portfolio

- Virology Controls
- Transplant Controls
- Respiratory Controls
- Custom Products
Transformational Changes
Adjusted EBITDA Margin - Continued Progress

2017 2018 2019 2020

Today
Bio-Rad Today

- Building our market and product leadership
- Leveraging investments in the future
- Increased focus on acquisition
- Capable management team