



SOLUTIONS TO HELP HEALTHCARE WORK. **BETTER.***

For 137 years, we've been helping healthcare work.
Now we're all being asked to do more.

For 137 years, Owens & Minor has been here to help healthcare work. If we don't show up with the products you need at the right place and right time, your clinicians can't get their work done. We recognize what a responsibility that is.

As the healthcare industry is undergoing significant changes, we're all being asked to do more to solve problems that are threatening the sustainability of our healthcare system. In short, we are being asked to Help Healthcare Work BETTER.

The foundation of our future is a BETTER SUPPLY CHAIN —delivering on our promise of REDUCING TOTAL COSTS

and SUPPORTING QUALITY OF CARE. And, delivering it with the service excellence you've come to expect from Owens & Minor.

That's why at Owens & Minor, we're investing in the products, services and technologies needed to make supply chain a key driver in the shift to a more sustainable, value-based healthcare system.

We're investing to meet your needs today, and in our vision of a healthcare system that works BETTER. Join us in making that envisioned future a reality for your system.

SOLUTIONS TO HELP HEALTHCARE WORK. BETTER.*



OUR VISION IS A HEALTHCARE SYSTEM THAT WORKS. **BETTER.**

Put another way, our vision is a world where healthcare systems can sustainably elevate quality of care and deliver financial value for their patients, organizations and communities.

WHAT DOES BETTER LOOK LIKE?

The foundation of our future is a BETTER SUPPLY CHAIN —delivering on a promise of REDUCING TOTAL COSTS and SUPPORTING QUALITY OF CARE.

As hospitals and networks reimagine their own future visions and retool their footprints, our supply chain customers are called upon to deliver clinical and strategic value well beyond lowering costs on med/surg distribution rates.



OWENS & MINOR BY THE NUMBERS:

52

DISTRIBUTION CENTERS
IN THE U.S. INCLUDING O&M,
BYRAM, PRODUCTS AND SLCS

8M+

SQ FEET OF
U.S. SPACE

360,000

ACTIVE SKUS

1,400+

BRANDED
MANUFACTURERS

\$9B+

GLOBAL REVENUE

INVESTING IN TODAY, AND THE FUTURE.

At Owens & Minor, we're investing in today and tomorrow. Over the past three years, we've invested over \$1 Billion, including hundreds of millions of dollars of investments in our core business.



- Gartner "Master Class" leader for Healthcare Supply Chain
- Hundreds of millions invested on quality, productivity and accuracy
- 10-20% more inventory days on hand than 10 years ago

#1

MARKET LEADER IN FACE MASKS AND STERILIZATION WRAP¹

MARKET LEADER IN SURGICAL AND INFECTION PREVENTION

#2

BY REVENUE IN PATIENT-DIRECT CHANNEL²

#2

CONVENER IN BPCI ADVANCED³

OWENS & MINOR MAJORITY INVESTOR

500+

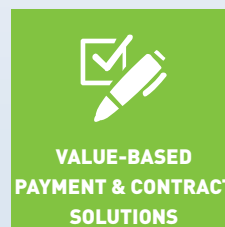
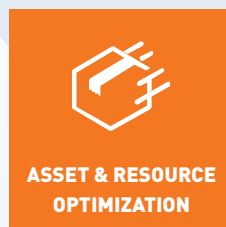
DEPARTMENTS USE QSIGHT

\$5M IN RECENT UPGRADES



SUPPLY CHAIN SOLUTIONS:

Efficient planning, operations and service delivery leveraging technology and data to get the right products to the right place at the right time as reliably and cost effectively as possible. *Examples: Bulk, LUM, Expanded Access*



ASSET & RESOURCE OPTIMIZATION:

We consult and partner to manage your assets most effectively—we look at your physical assets, your human assets and the potential for combining forces differently to do more with less. *Examples: Strategic Logistics Centers, On-site Services, Space Planning & Logistics Optimization*

POINT OF CARE SOLUTIONS ACROSS THE EPISODE OF CARE:

We bring all of our Products, Services, Technologies and Resources to solve problems unique to key points of care—like the OR or the Home for example. Then we provide actionable data to better connect those key points of care across the episode. *Example: Solutions to Reduce O.R. Waste including QSIGHT* and SURGITRACK*, as well as BELINTRA STERISYSTEM®, AERO* Gowns, BLUE RENEW* and others.*

VALUE-BASED PAYMENT & CONTRACT SOLUTIONS:

We help healthcare providers optimize financial performance and quality of care by providing a variety of services as you migrate to a value-based environment. *Examples: Byram Healthcare & Fusion5*

¹Based on GHX 2017 data

²Based on third-party research

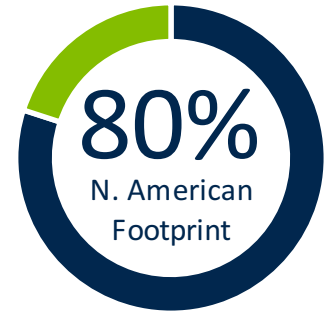
³By aggregate CMS claims spend from episode initiators



BETTER PRODUCTS SUPPORT QUALITY OF CARE AND REDUCE TOTAL COST.

Owens & Minor offers the widest array of product choices to give you control over your supply chain.

We support your goals of standardizing on the best products for your objectives — to reduce total costs and support quality of care. That’s why our Halyard Global Products Division offers best-in-class Med/Surg products, as well as price conscious offerings. Our Halyard Products — including our flagship HALYARD* brand, as well as MEDICAL ACTION*, AVID* and MEDICHOICE*— are now over 80% manufactured in North America. Because disruptions can occur anywhere in the supply chain – in raw material supply, manufacturing, in shipping lanes and at ports, and in supplier inventories – Halyard invests in vertical control of supply chain to keep the process simple and reliable. In the heavy 2018 flu season, Halyard’s vertically-integrated supply chain ramped up quickly to deliver over 300 Million face masks.



2 WEEKS (OR LESS!)
FROM HALYARD



UP TO 8 WEEKS
FROM ASIA



We are the preferred partner for Branded Manufacturers who offer clinical value and expertise.

Owens & Minor has a long history as a distributor. We work with over 1,400 third-party branded manufacturers who sell over 360,000 active SKUs through our channel. By bringing together the most clinically relevant products and educational resources available, we work with your team to maximize impact both in terms of reduced product cost AND in terms of supporting quality of care.

EXPAND ACCESS THROUGH ONE SUPPLY CHAIN, INCLUDING SPECIALTY AND PPI SKUS.

Beyond med/surg supplies, we are expanding access to products that don't typically go through a distribution partner. We can offer you one supply chain, including specialty and PPI SKUs.



*Registered Trademark, Trademark or Service Mark of Owens & Minor, O&M Halyard or its affiliates. ©2018. All rights reserved.

©Registered Trademark of Belintra, NV.

Manufacturer logos represent examples of the 1,400 manufacturers represented in our channel.

SOLUTIONS TO HELP HEALTHCARE WORK. BETTER.*

