

Investor's Conference March 17, 2011

3M Orthodontics -The secret behind beautiful, healthy smiles

William Cruise



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3M Orthodontics

- Where are we today?
- New product innovation
- Market expansion
- Geographic expansion
- 5-Year Outlook

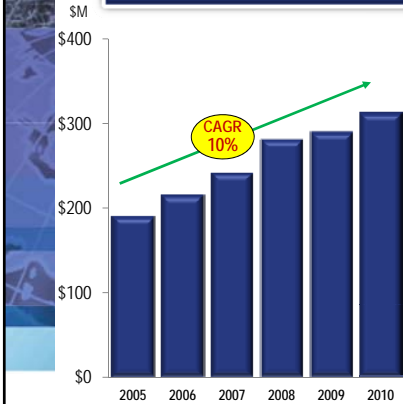
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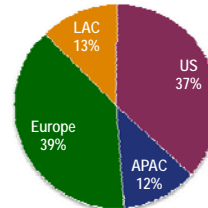


Attractive Market with Strong Historical Growth

3M Orthodontics Historical Sales



2010 Sales By Geography



Major Products/Technologies

- APC™ Adhesive Coated Appliance System
- Victory Series™ Brackets
- Clarity™ Ceramic Brackets
- MBT™ Versatile+ Appliance System
- Forsus™ Fatigue Resistant Device
- SmartClip™ Self-Ligating Appliance System
- Clarity™ SL Self-Ligating Appliance System
- Incognito™ Appliance System
- Lava™ Digital Models



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Series of Strategic Acquisitions Fueled the Growth



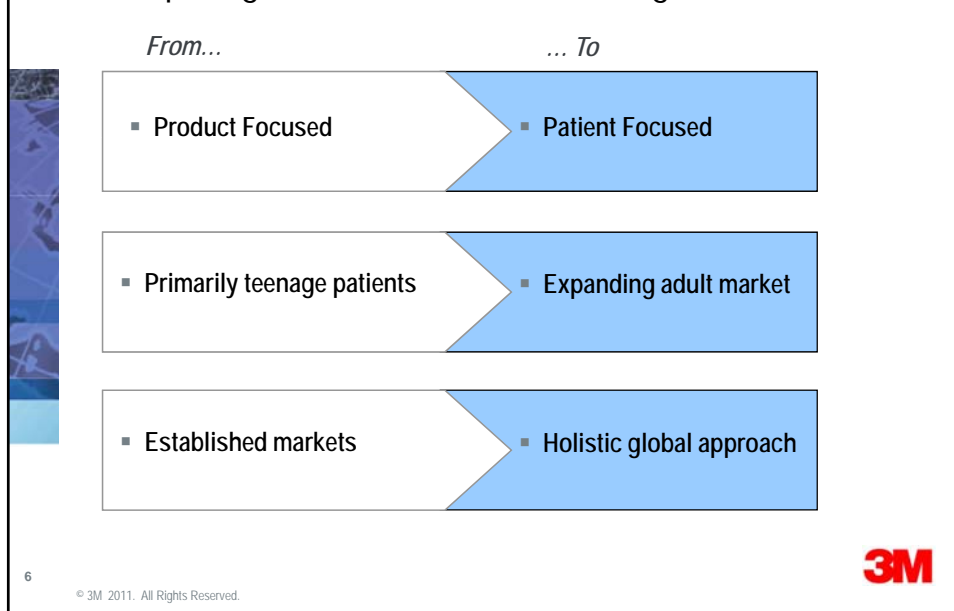
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Vision: #1 in All Key Orthodontic Markets



Anticipating the Needs of Fast-Moving Markets



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A History of Leadership Through Innovation



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Invisible Braces: Breakthrough Technology...



Individual
Patient
Customization

Ultimate
Invisibility

High Patient
Value

Huge Growth
Opportunity

** Assumes 3-4% of 2010 Estimated Worldwide Case Starts

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...That is Generating Buzz and Driving Demand...



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...Delighting Customers and Loved by Doctors

Video Clip

Comments from
Dr. Neil Warshawsky, Chicago, IL



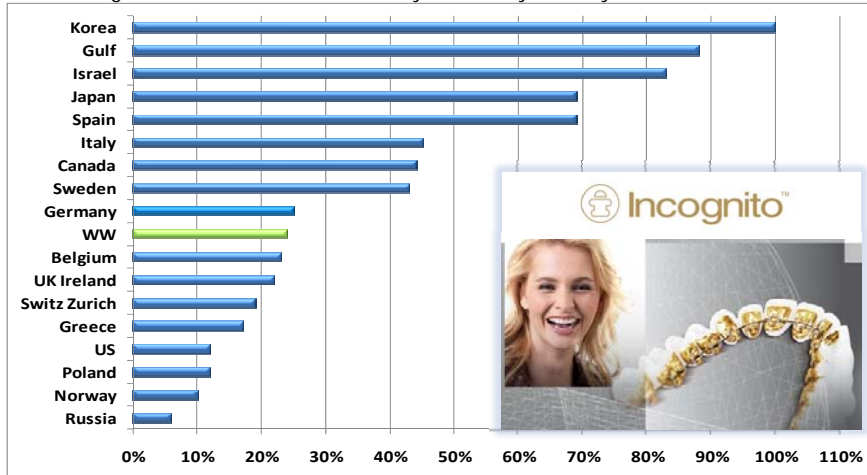
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Exponential Growth Opportunity

2010 Incognito™ Brackets Local Currency Growth by Country



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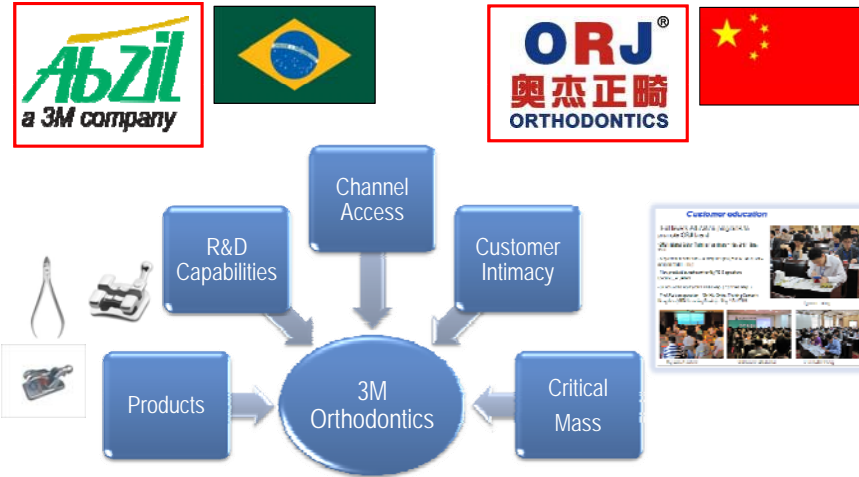
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Acquisitions Driving Expansion into High Growth Markets



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Global Supply Chain for Highest Quality at Lowest Cost



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Global Supply Chain for Highest Quality at Lowest Cost



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Transforming Our Business - Orthodontics



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Meeting the challenge of regional competitors

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Transforming Our Business - Orthodontics



Developing Markets

Meeting the challenge of regional competitors

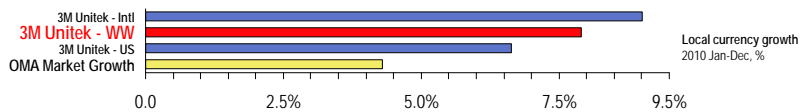
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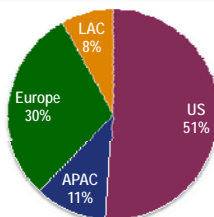


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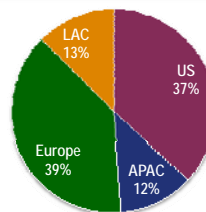
3M Unitek Outpaces Market 2X Through Aggressive Local Country Growth



2005 Sales By Geography



2010 Sales By Geography



- ~75% of Sales from Countries that grew faster than the market
- Growth is higher outside of the US, leveling the Geographic portfolio

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OMA = Orthodontic Manufacturers Association



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▪ 5-Year Outlook

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3M Orthodontics Going from Strength to Strength



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Bringing it all Together for 3M Orthodontics.....



- Plenty of runway to sustain and accelerate growth
- New product innovation feeds our continued success
- Market expansion (i.e. adults/invisible treatment) accelerates growth
- Geographic expansion cements our future
- And, by the way, I have...

"Put my mouth where the money is!"