

EUHA 2025

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Strong market response for Phonak Infinio

Infinio Sphere ranked #1 in background noise by Hearing Tracker and for speech in noise performance by HearAdvisor

>1.5
Mio.

Units sold

On Infinio platforms in the first 12 months – representing the most successful launch in Sonova's history

MS
gain

Market share gains

Significant market share gains in first 4 quarters after the launch

~ 50%

High share of Sphere

Globally, Sphere Infinio accounted for around half of Infinio platform sales reflecting appreciation for its strong consumer benefits

~ 60%

Successful in the VA

Overproportionate share of Infinio Sphere in the VA with sales exceeding total sales of each competitor across all products

From Incremental AI to true breakthrough

Phonak solves #1 unmet need – speech in noise – with defensible AI and proven clinical outcomes



Incremental AI from peers

Sound scene classification

- Well understood problem
- Peers small DNN with marginal gains
- Phonak expanding lead with AutoSense OS 7.0, built on 25 years of AI expertise

Speech understanding in noise

- SNR benefit of directional microphones and beamforming reaching its limits
- Restricted to one speaker and one direction
- No true separation of speech
- Marginal gains of peers small DNNs postprocessing after beamforming
- Phonak's traditional SmartSpeech™ proves superior in clinical outcomes



Sphere - Phonak's breakthrough

First real-time, large-scale DNN

Step 1: Extracts voices from sound scene with large-scale DNN

Step 2: Enhances extracted voices from all directions, simultaneously with unlimited speakers

Step 3: Integrates enhanced voices back into full sound scene. Deliver unmatched clarity and natural experience

Industry first benefits

- Unmatched Speech Clarity
- Unlimited number of speakers
- Speech from any direction
- Instant adaptation



Why only Sphere can deliver it

Off-the-shelf chips lack

- 10x neural connections
- 21x memory
- 4x power efficiency

Proprietary DEEPSONIC™ chip

- IP-protected, built specifically for solving speech in noise challenge
- Specific NPU architecture to compute powerful DNN
- 53x more powerful than off-the-shelf
- 7.7 billion operations per second

Strong clinical evidence

- >10 dB SNR improvement
- 20-30% improved speech intelligibility
- 2-3 times more likely to understand speech in noisy environments
- 35% less listening effort

Phonak's real-time large-scale DNN delivers a breakthrough advantage competitors cannot match easily

Sphere – Phonak's breakthrough

Spheric Speech Clarity™ works like no other DNN



Extracts

the speech signal
from the full sound
scene in real-time

Enhances

the extracted speech
from unlimited speakers
and from any direction

Integrates

with heightened
contrast for enhanced
speech clarity

Sphere – Unique benefits when it matters the most

Unmatched speech clarity.

Unlimited number of speakers.

Any direction.

Instantly.

Virto™ R Infinio

Unlocking a new growth category.

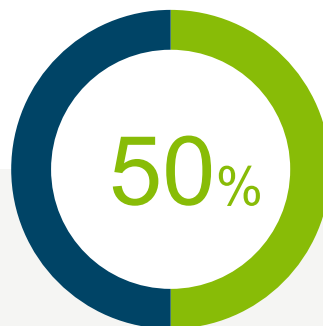


Category Expansion: Unlocking a >CHF 400 Mio. market growing at 6–8% CAGR

Rechargeable ITE = big untapped growth driver



> CHF 800 Mio.
global custom ITE market



> 50%
of ITE market now rechargeable



6-8% CAGR
above overall hearing care market



Virto™ R Infinio positions Phonak to lead the shift towards rechargeable custom hearing aids



PHONAK
life is on

Virto R Infinio: Engineered for rich, natural sound quality. Made personal.



RightFit™ customization

For comfort, style, and a fit that is as small as possible



Exceptional Infinio™ sound quality

Sound Performance made personal. Engineered for rich, natural sound quality that adapts to your hearing in every situation.



Market-leading connectivity

Combines discretion with universal Bluetooth® functionality

RightFit™ - AI-driven personalization for optimal fit and acoustic performance



Individual ear anatomy and audiogram data



Acoustically Optimized Venting

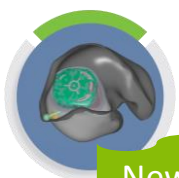


Acoustically Optimized Receiver

New

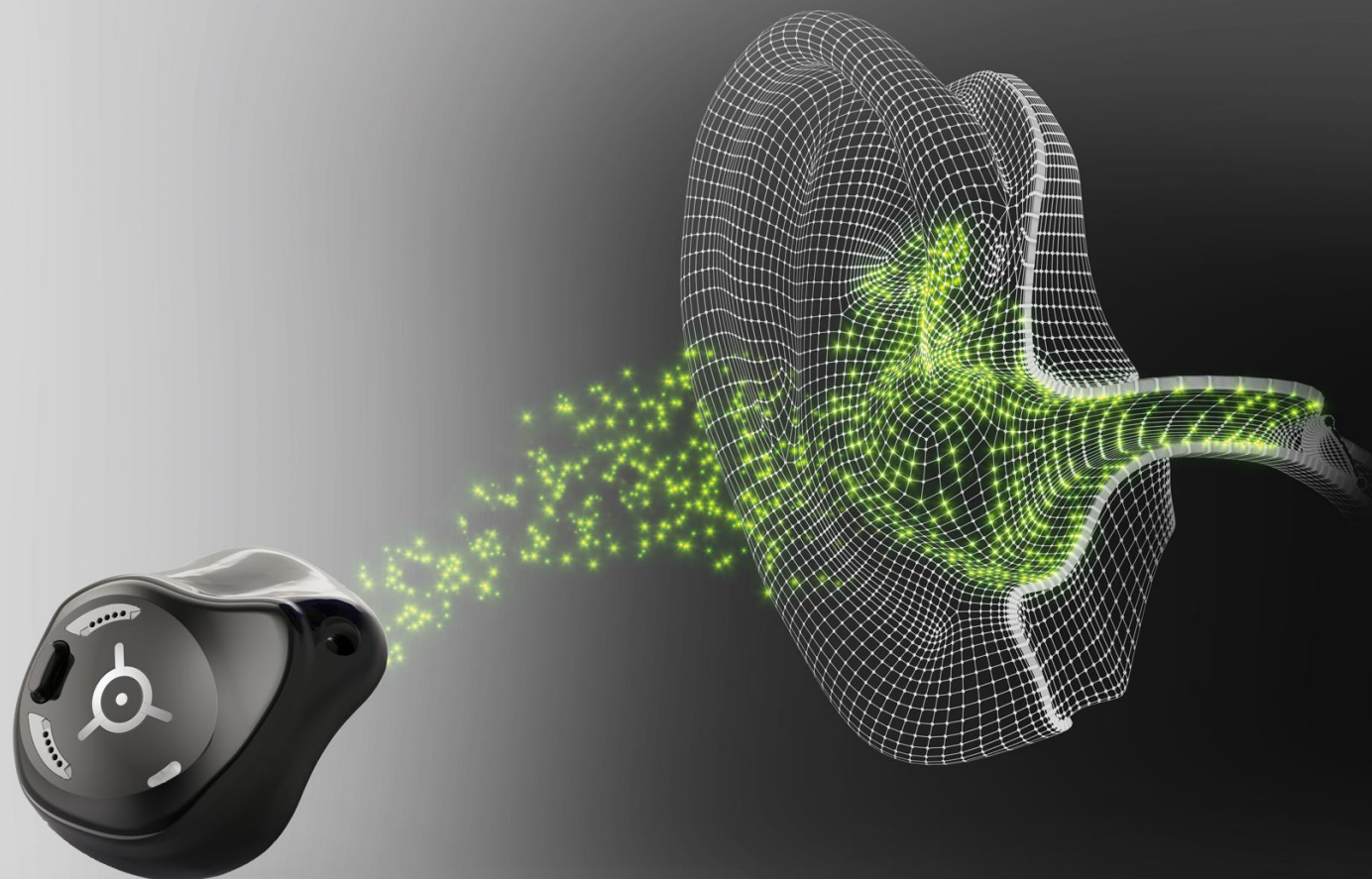


Biometric Calibration



Advanced RightFit™ modeling

New



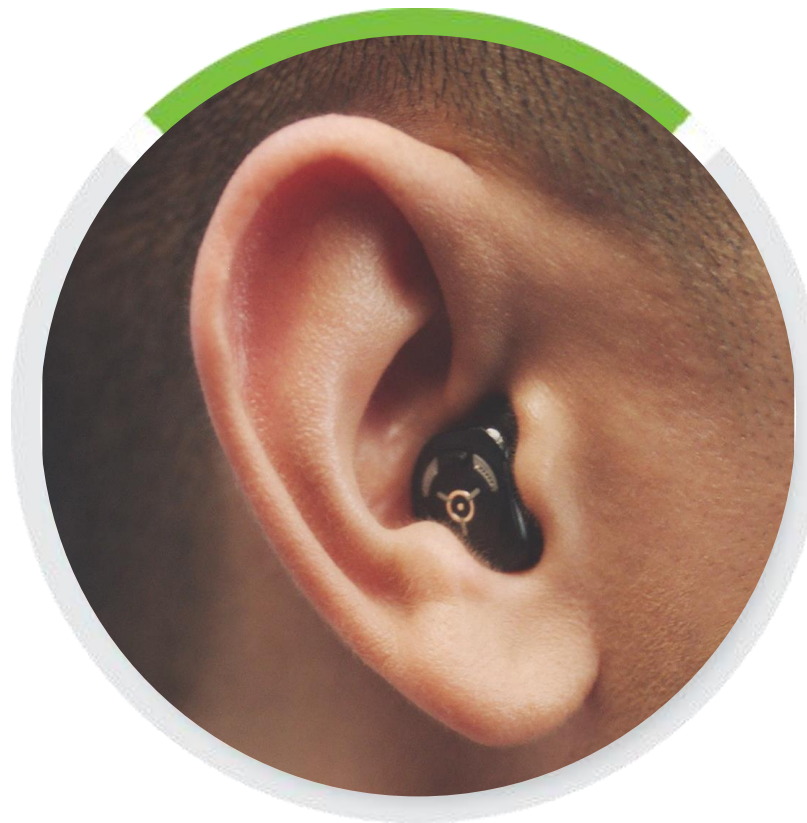
Smallest size, big benefits with RightFit™ customization

Up to 15%

smaller custom hearing aids

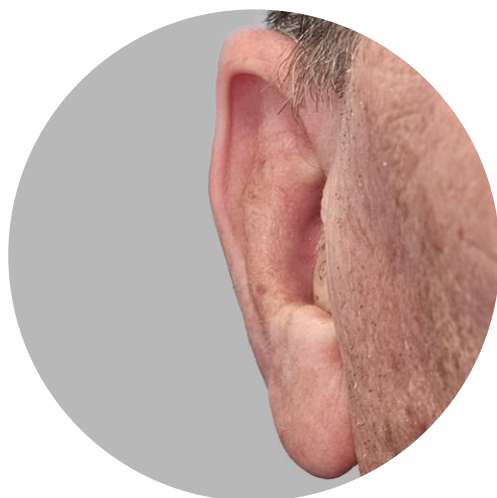
80%

estimated reduction in remakes

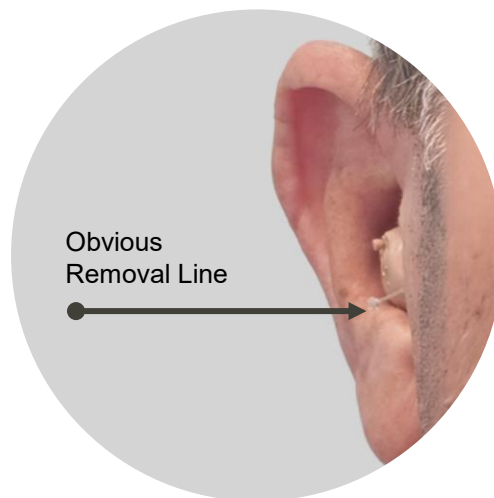


*The image displayed represents a potential outcome of RightFit customization. Individual differences in anatomy or opting out of RightFit™ defaults may result in a different size and fit.

Virto R Infinio beats main competitor's CIC-R on size and quality



Phonak
Virto R Infinio



Competitor's
device (CIC-R)



"Virto I-R are more discreet with lower profile when in-ear"



"Virto I-R are very comfortable to wear."



"Virto I-R are of very high quality."



"Virto I-R are very easy to remove from the charger"



Infinio Ultra
The very best.
For you.

Ultra adaptive
connected
easy
clear

"I need my hearing aids to work everywhere, instantly."

PHONAK
life is on

Adaptive – The best sound for you.
No matter the situation. Anytime.
Anywhere.

New

18 x

AutoSense OS™ 7.0 was trained with 18 times more sound environments than the previous generation, **adapts 24% more precisely** to listening situations

93%

93% client satisfaction from the very first fit compared to a key competitor¹

New

8dB
SNR

SmartSpeech™ Technology delivers **up to 8 dB SNR** benefit in group conversations, outperforming competitors - automatically with AutoSense™ OS 7.0

1. Stewart, E., Adler, M., Seitz-Paquette, K. (2024) "Adaptive Phonak Digital (APD) 3.0 is the preferred first fit compared to a leading competitor device". Phonak Field Study News retrieved from <https://www.phonak.com/evidence>.

"I want it to connect seamlessly to all my devices."

PHONAK
life is on

Connected – Always universal.
Connectivity that works – no
matter the device, no matter the
moment.

New

1
step

Connected faster with the new **one-step pairing** to myPhonak and smartphones and tablets

8
devices

Universal connectivity pairs with up to 8 Bluetooth® devices, with the flexibility to have 2 simultaneously connected



Wax is inevitable



- Tiny parts.
- Frustrated fingers.
- Lost time.
- Lost time for HCPs, for users, for families.
- Too many needless appointments or even unnecessary repairs.
- Wax filters are troublesome.
- They're annoying.
- And until now, have been considered a fact of life.

The breakthrough

Patented Phonak EasyGuard™



**up to
38%** fewer service visits!

Welcome to the revolution

Are you ready?



“I don’t want to deal with maintenance and wax filter”



Easy – Easier maintenance. For everyone. Phonak does the work, so you don't have to.

Phonak patented **EasyGuard™**



New

removes the struggle of **wax filter changes**

New

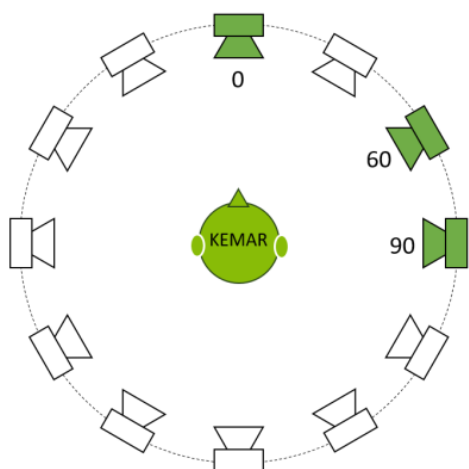
38%

reduces service appointments by up to 38%¹



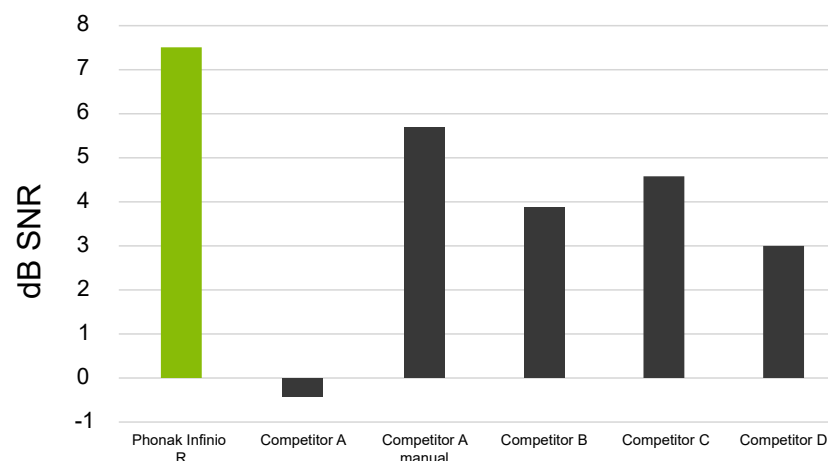
¹. Based on internal Sonova data. Please contact claims@sonova.com for more information.

Infinio Ultra R outperforms competitors for speech in loud noise performance

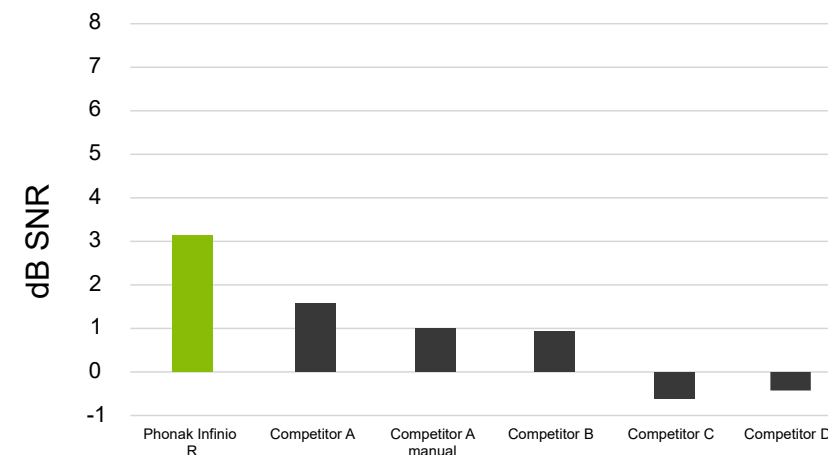


Realistic conditions with different speaker directions at 0, 60 and 90

Orientation of speech: 0°



Orientation of speech: 90°



- Infinio Ultra R utilizes SmartSpeech™ Technology to address speech understanding in loud noise
- Automatically activated through AutoSense™ OS 7.0
- **Infinio Ultra R outperforms key competitors**
- **Best SNR improvement for speech from front as well as from side**



A class of its own.

Introducing Spheric Speech Clarity 2.0™

Sphere – Phonak's breakthrough

Unmatched speech clarity.

Unlimited number of speakers.

Any direction.

Instantly.

All day Spheric Speech Clarity 2.0 – From any direction

From 3 hours to 11 hours of automatic Spheric Speech Clarity 2.0 – on a single charge

From

Unmatched
speech clarity
for part of the day



To

New

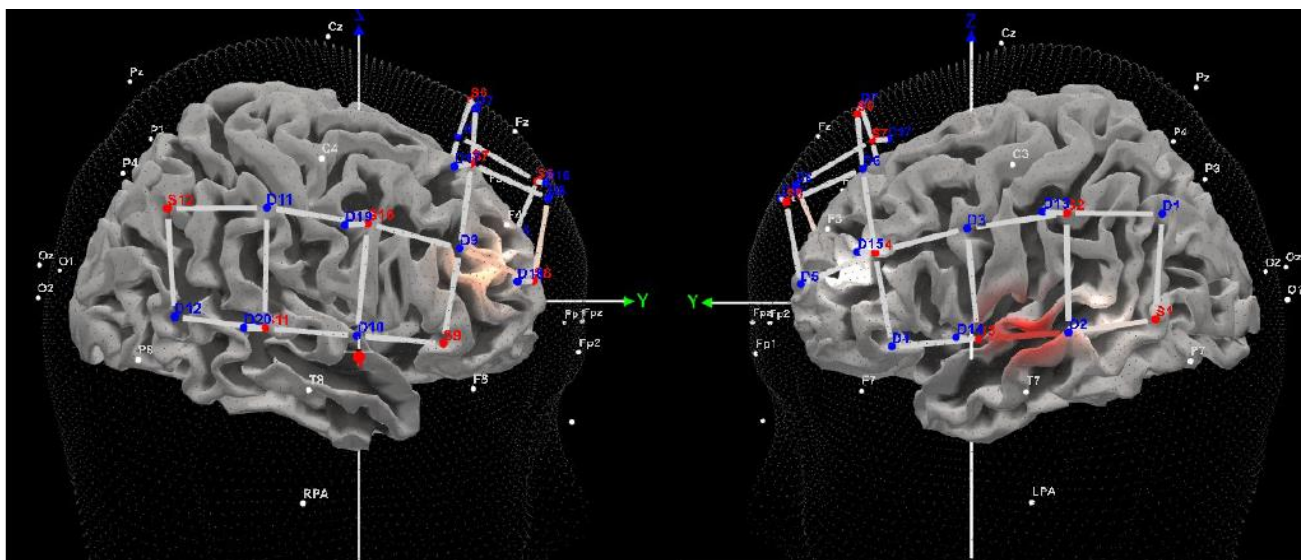
Unmatched
speech clarity
all day long

Thanks to continued
training of our large DNN

Clearer speech. Less listening effort. More energy throughout the day.

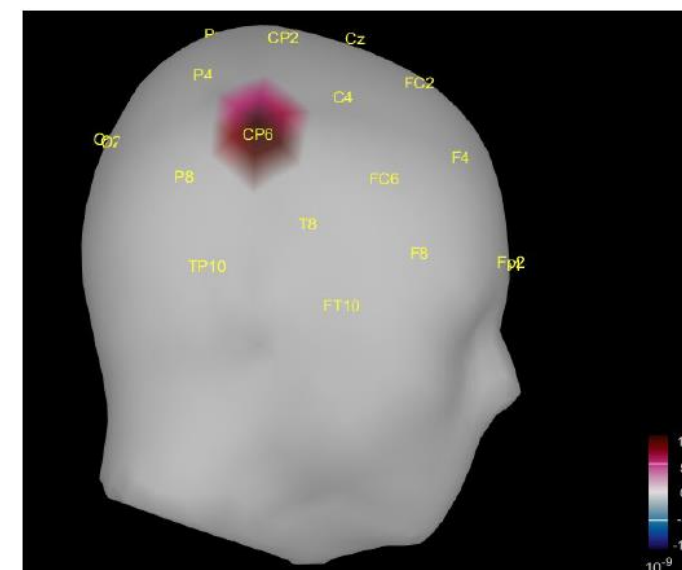
Clinical evidence continues to confirm market preference

fNIRS Blood flow measurement



- Less energy in Broca's area and the Auditory Cortex
- Lower neural demand and less mental effort

EEG Theta Band



- Stronger neural alignment for syllable parsing, speech tracking, and attention

"I want to hear better
in noisy environments."

PHONAK
life is on

Clear – Any voice. Any direction.
Always clear.

Our DEEPSONIC™ DNN **extracts, enhances, and integrates** speech in real-time to deliver unprecedented speech clarity in noise from any direction.

Instant all-around speech understanding in noise –
with an unprecedented 10.2 dB SNR improvement
in real-world scenarios^{1,2}

Proven to **reduce listening effort by up to 35%**³

Up to 11 hours of Spheric Speech Clarity 2.0
– 30% more efficient

New



10.2
dB

35%

30%

1. Wright, A., Kuehnelt, V., Keller, M., Seitz-Paquette, K., Latzel, M. (2024). "Spheric Speech Clarity 2.0 applies DNN signal processing to significantly improve speech understanding from any direction and reduce the listening effort." Phonak Field Study News retrieved from <https://www.phonak.com/evidence>
2. Rauber, S., Kohlhauser, P., Jehle, F., Kühnelt, V., Preuss, M., Hobi, S. (2024). Spheric Speech Clarity 2.0 proven to outperform three key competitors for clear speech in noise. Phonak Field Study News retrieved from: <https://www.phonak.com/evidence>.
3. Tian, E. et al. (2025) Spheric Speech Clarity significantly improves speech understanding in a multi-talker scenario and reduces spatial listening effort with Mandarin speakers. Phonak Field Study News. Retrieved from <https://www.phonak.com/evidence>.

Expanding our innovation and AI leadership

Launching comprehensive portfolio to address both customer and consumer needs

Audéo Infinio Ultra Sphere™

- With powerful **proprietary AI chip** to instantly detect extract and enhance speech
- Now **30% more efficient**, delivering Spheric Speech Clarity™ 2.0 all day long



Audéo Infinio Ultra R

- **Outperforms competitors** for speech in loud noise performance



AutoSense OS™ 7.0

- Built on **25 years of AI expertise**
- **Adapts 24% more precisely** to listening situations

One-step pairing

- Market leading universal connectivity now with convenient **one-step pairing**



Virto R Infinio

- Entering **new market** segment
- **Infinio Sound Quality**
- Sleek, compact **design**



Phonak EasyGuard™

- **Removes the struggle** of wax filter changes
- **Reduces service appointments** by up to 38%
- **Patented**

