

Chronic Care

Sustaining growth leadership

Coloplast Capital Markets Day 2020
September 29th 2020
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Coloplast Group - Ostomy Care / Continence Care / Wound & Skin Care / Interventional Urology

Making life easier

Stina



We have a strong outset from the LEAD20 period



Broad based growth of **7-8% above the market** driven by **innovation & a strong commercial model**



Double-digit growth in the US and **notable wins** in the Ostomy Care **acute segment** incl. a position on the **Premier GPO**. In Continence Care, we continue to drive the **upgrade to hydrophilic catheters**



Growth significantly above the market in Ostomy Care and driven by a **large sales team, strong digital presence** and the **broadest ostomy offering**



We opened up **new intermittent catheter opportunities** in **Japan, South Korea** and **Australia**



We continued to solidify our offering within **Consumer, Coloplast Care and Direct** – the model proved **robust through COVID-19**



In **response to COVID-19**, we are adapting our **go-to-market model**

Chronic Care represents more than 75% of Coloplast sales and we continue to outgrow the market

Chronic Care sales, in DKK

FY 18/19



>75%

of Coloplast sales

13.6

billion of DKK annual sales

#1

global position

■ Chronic Care
■ Rest of Coloplast business

Chronic Care sales in DKK by BA

FY 18/19



■ Ostomy Care
■ Continence Care

Chronic Care sales in DKK by region

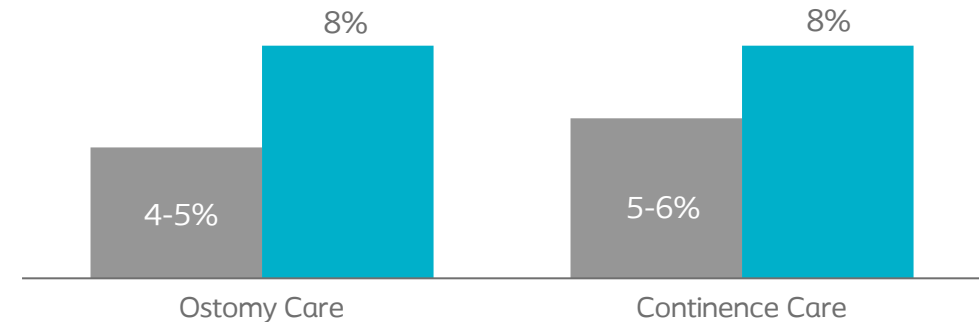
FY 18/19



■ European markets
■ Other developed markets
■ Emerging markets

Chronic Care reported sales growth vs. market by BA, %

FY 18/19



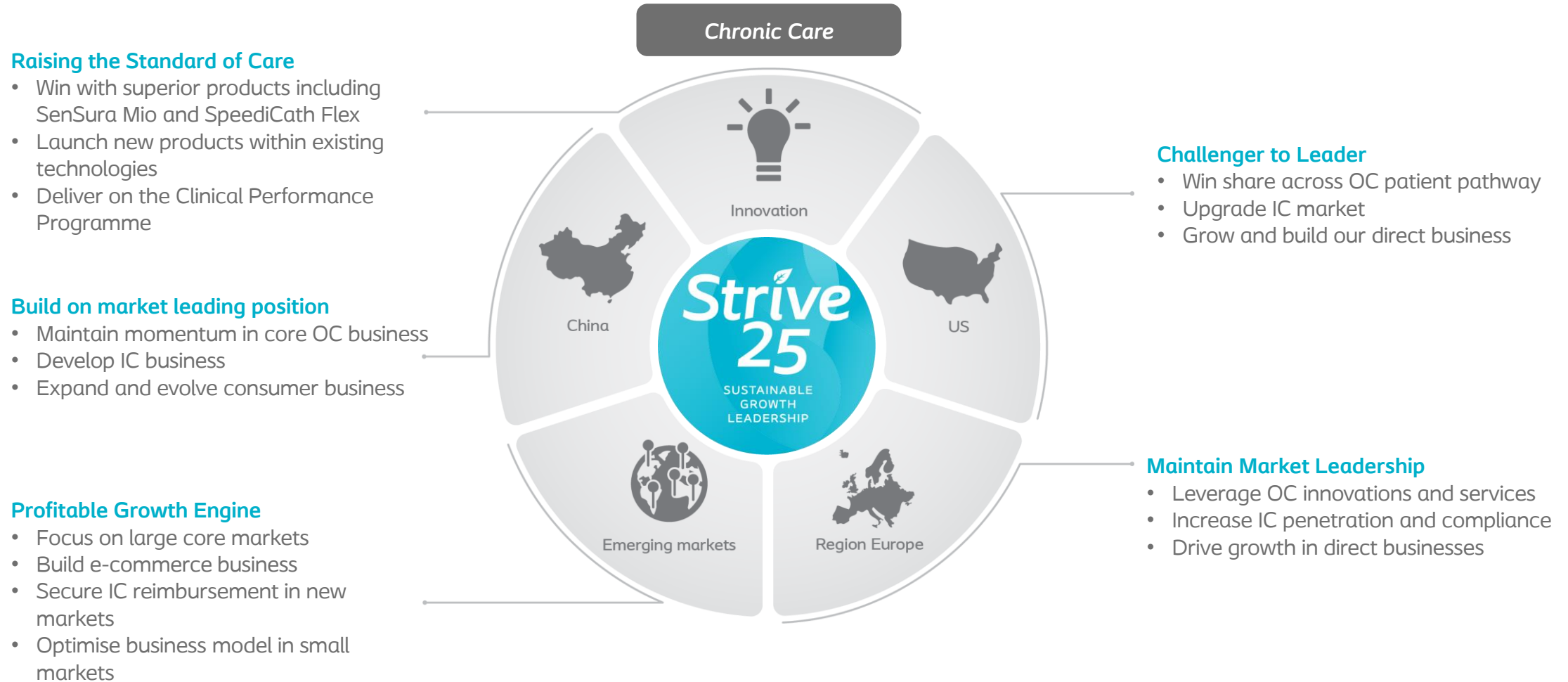
■ Coloplast growth
■ Market growth

Market growth drivers/trends

- + Ageing population
- + Consumerism of healthcare
- + Digital and technology transformation
- Cost pressure and demand for value from payers
- Earlier detection and cure

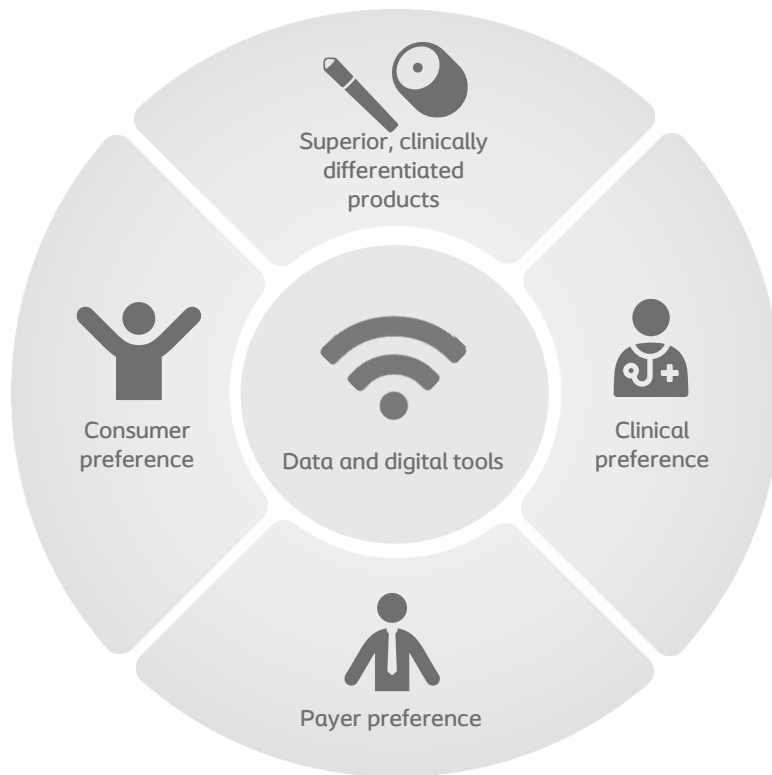
Source: Coloplast

Our *Strive*25 strategy will enable us to deliver solid growth above the market towards 2025



We have built key enablers to support the commercial model

Commercial model

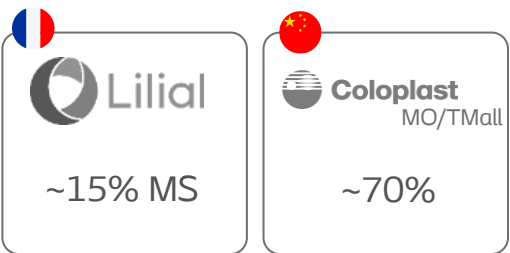


Key enablers



Direct business serving consumers drives improved outcomes and is a vital component of our growth engine

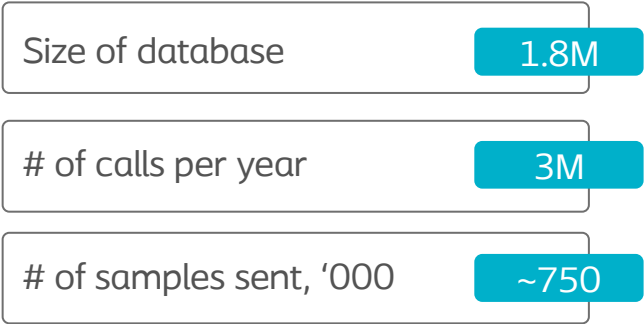
Direct presence in top 5 markets and strategic rationale



High single digit growth rates

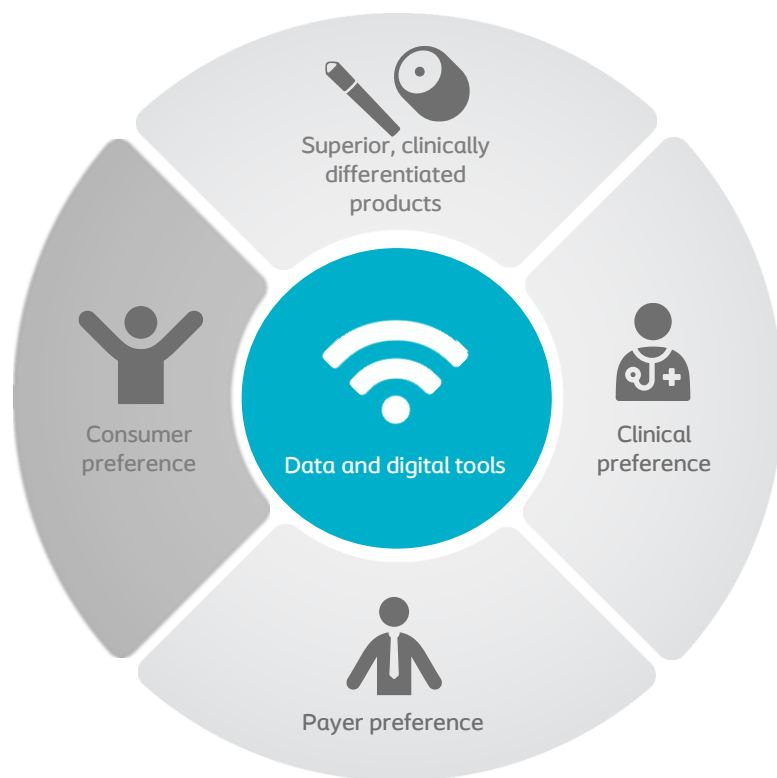
- 1 Control and continuity of product supply
- 2 Target the full value pool
- 3 Direct access to consumers
- 4 Direct relationship with payers
- 5 Improve patient outcomes
- 6 Protect patient pathway

Coloplast Care presence



Data & digital tools are a key enabler for our consumer activities

Data & digital tools



Digital priorities



Engaging mobile offering for HCPs, consumers and prescribers



On-line ordering with simple user experience across platforms

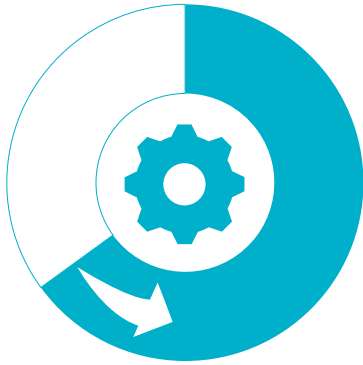


One high performing infrastructure to drive efficiency and enable high-impact service deployment

1: Total digital CAPEX investments 2017-2020

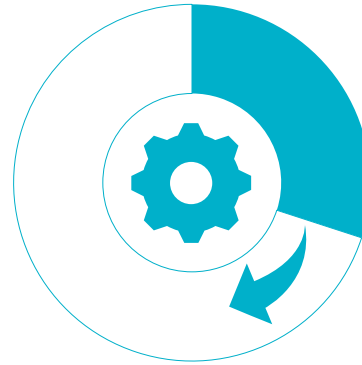
Challenges of the pandemic mean we continuously rebalance our go-to market model

Field sales force



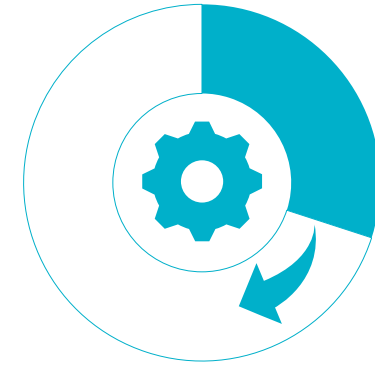
- + Focus on training and upskilling
- + Strong relationships maintained
- Lower sales productivity
- Limited in-person access to customers

Inside sales (to HCPs)



- + Digital tools to support an interactive dialogue
- + Higher productivity vs. field sales force
- Difficult to establish new relationships

Direct to consumer



- + Greater reach into community
- + Easy to scale
- + Compatible with working from home

With *Strive*25 our ambition is to continue to outgrow the market

Chronic Care 2025 strategic themes



Our ambition for Chronic Care



Ambition

Continue to outgrow the market

Our mission

Making life easier for people
with intimate healthcare needs

Our values

Closeness... to better understand
Passion... to make a difference
Respect and responsibility... to guide us

Our vision

Setting the global standard
for listening and responding