

Chronic Care

# Sustaining growth leadership

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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

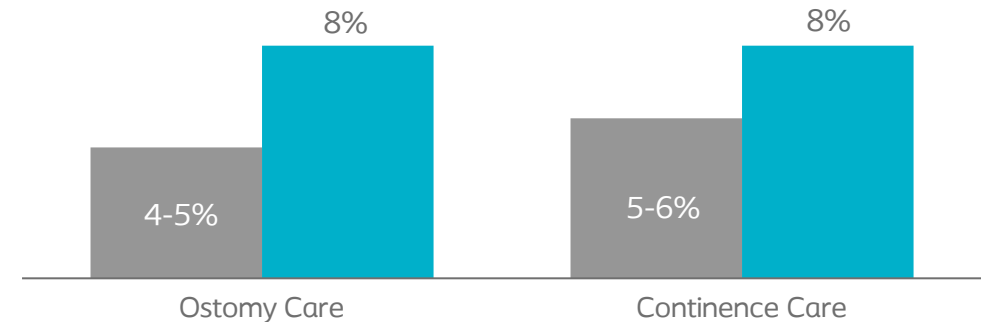
FY 18/19



- 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

## Raising the Standard of Care

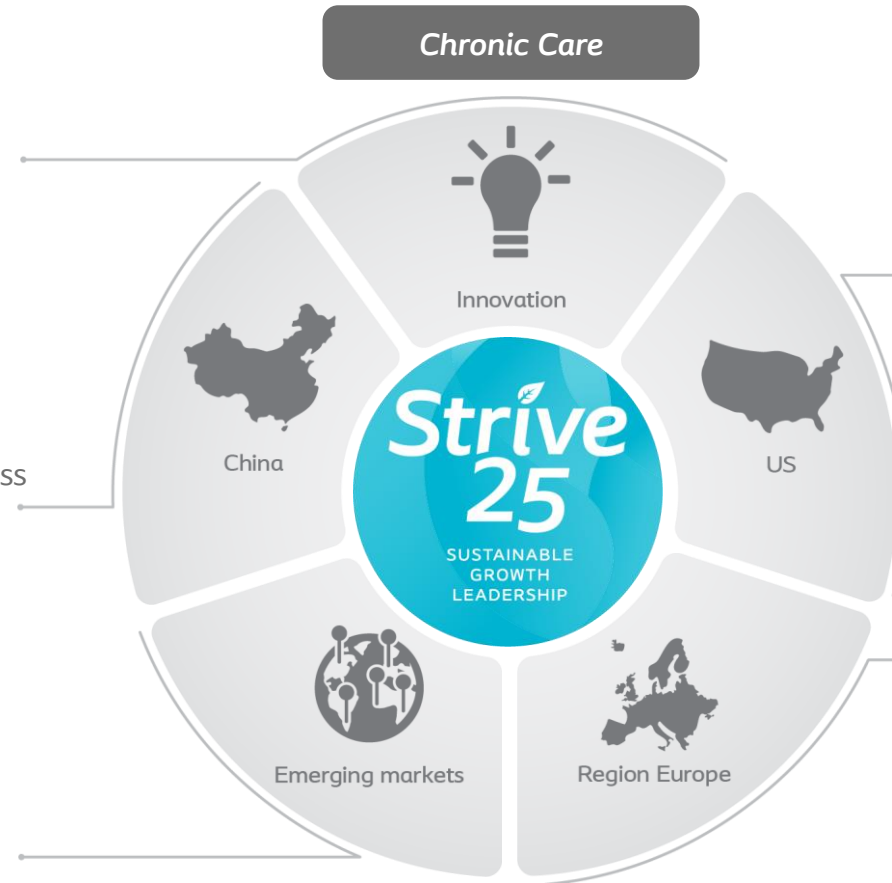
- Win with superior products including SenSura Mio and SpeediCath Flex
- Launch new products within existing technologies
- Deliver on the Clinical Performance Programme

## Build on market leading position

- Maintain momentum in core OC business
- Develop IC business
- Expand and evolve consumer business

## Profitable Growth Engine

- Focus on large core markets
- Build e-commerce business
- Secure IC reimbursement in new markets
- Optimise business model in small markets



## Chronic Care



Innovation



China



US



Emerging markets



Region Europe

## Challenger to Leader

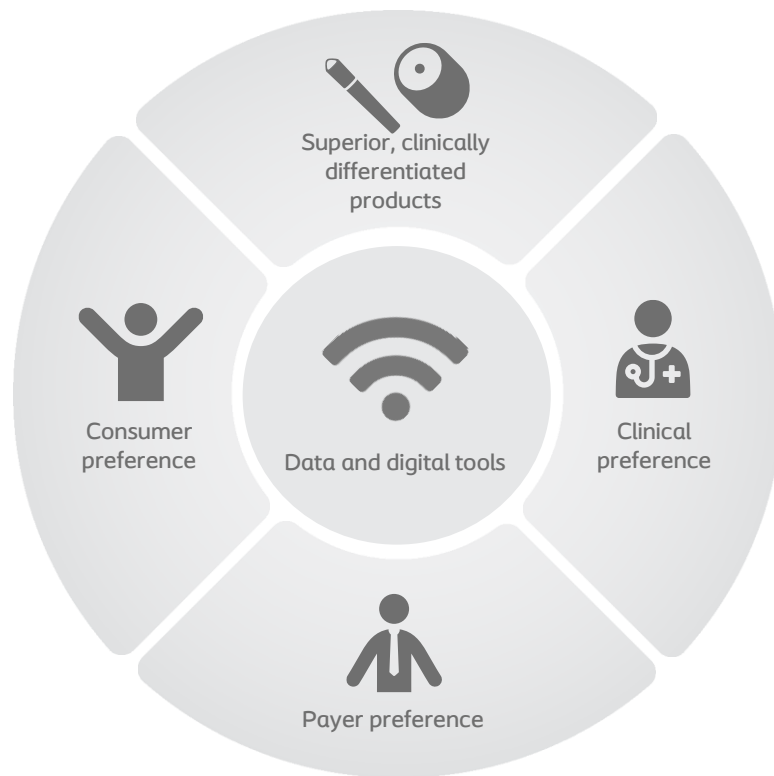
- Win share across OC patient pathway
- Upgrade IC market
- Grow and build our direct business

## Maintain Market Leadership

- Leverage OC innovations and services
- Increase IC penetration and compliance
- Drive growth in direct businesses

# We have built key enablers to support the commercial model

## Commercial model

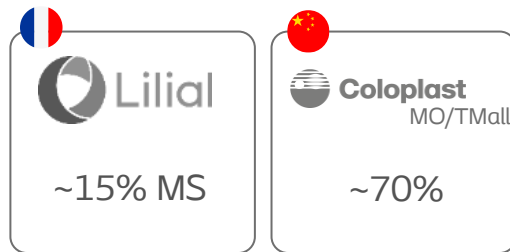
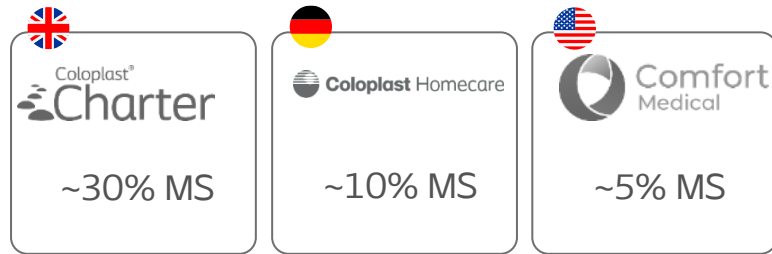


## Key enablers



# 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

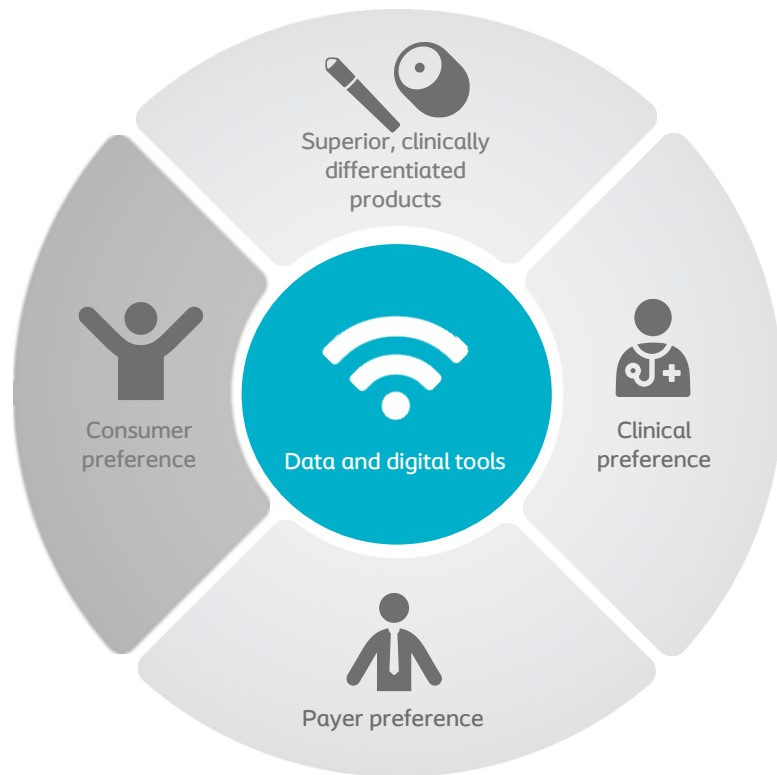
 **+30 countries**  
with a consumer setup

Size of database	1.8M
# of calls per year	3M
# of samples sent, '000	~750

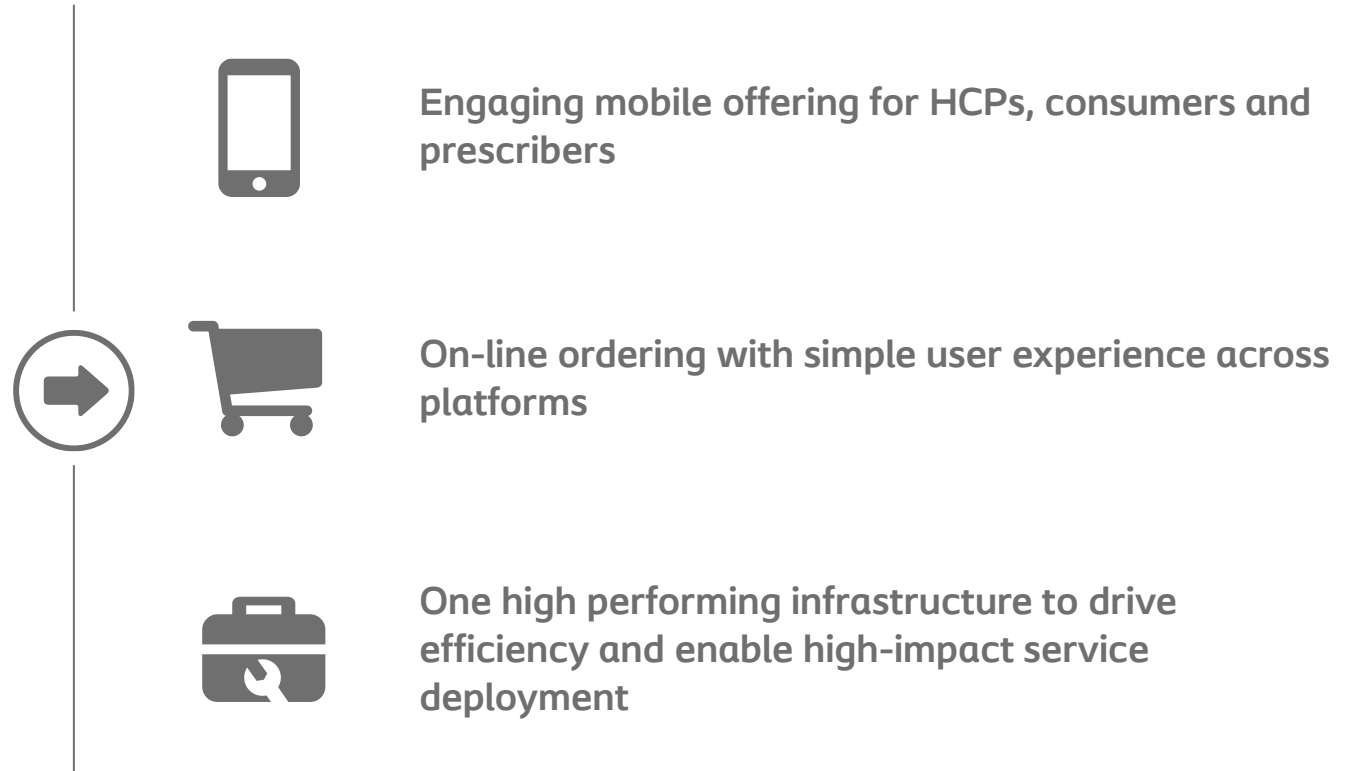


# Data & digital tools are a key enabler for our consumer activities

## Data & digital tools



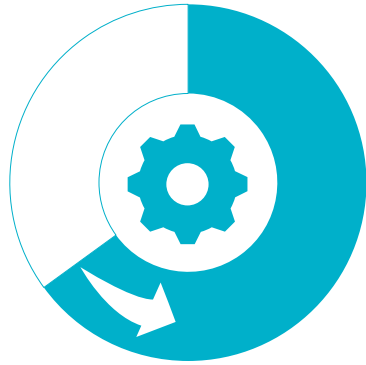
## Digital priorities



1: Total digital CAPEX investments 2017-2020

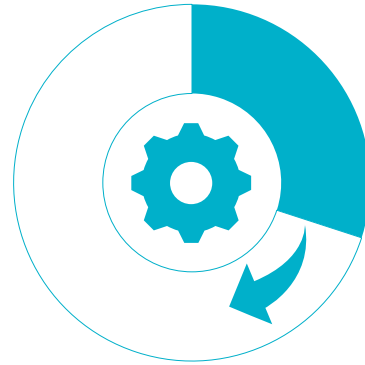
# Challenges of the pandemic mean we continuously rebalance our go-to market model

## Field sales force



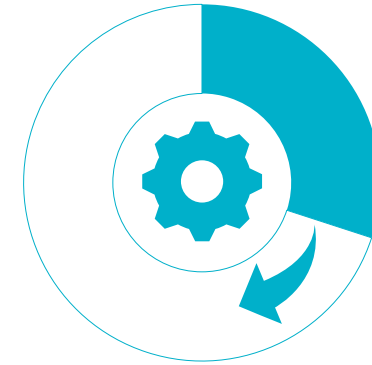
- + Focus on training and upskilling
- + Strong relationships maintained
- Lower sales productivity
- Limited in-person access to customers

## 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 *Strive25* 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