

China Chronic Care

Building on market leading position

Coloplast Capital Markets Day 2020

Virtual break-out session

October 7th 2020

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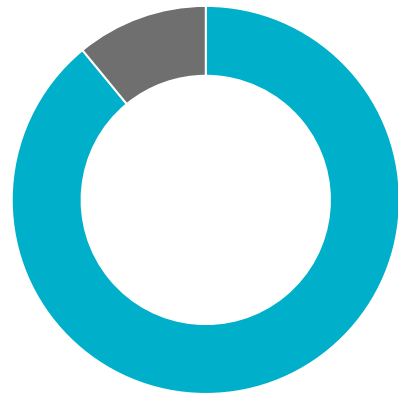
Coloplast Group – Ostomy Care / Continence Care / Wound & Skin Care / Urology Care

Making life easier



We have a solid leadership position in China Ostomy Care

Revenue DKK, FY 18/19



■ Ostomy Care
■ Continenence Care



Top 3
growth contributor in
Coloplast Chronic Care



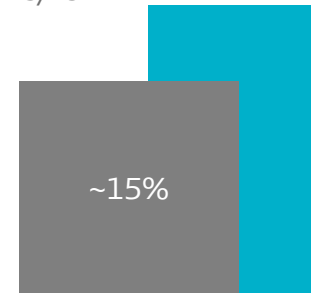
~5%
of total Coloplast
revenue



>500
people in the
organisation

Market growth & market drivers

FY 18/19



■ Coloplast growth
■ Market growth



Ageing population



Growing affluent population



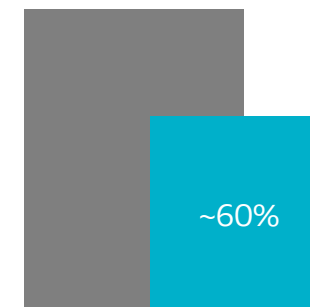
Urbanisation



Increasing prevalence
of chronic diseases

OC manufacturer China market share

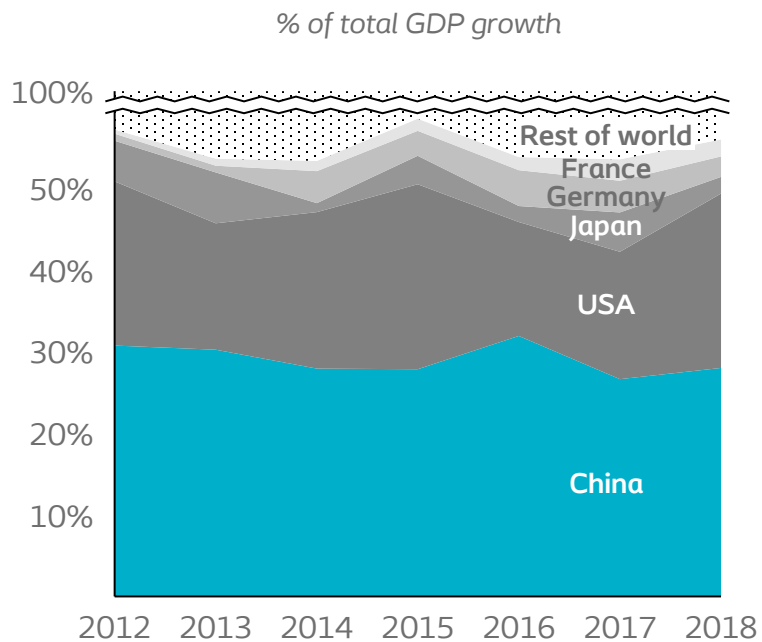
FY 18/19



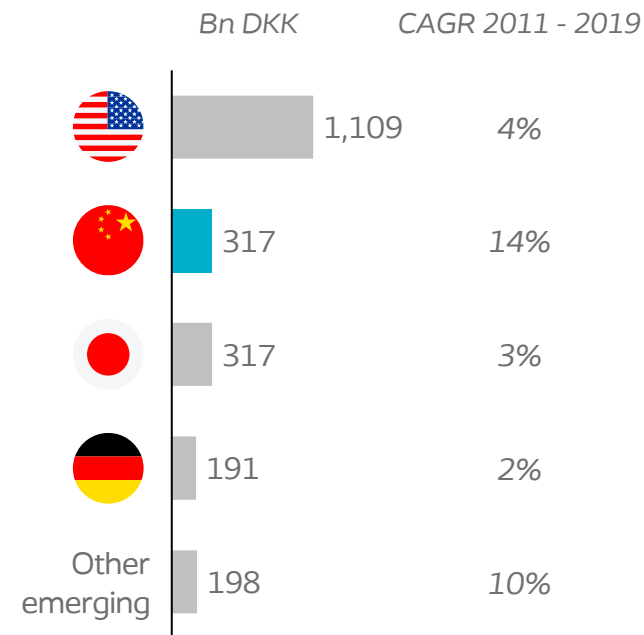
■ Coloplast size
■ Market size

We need to win in China to win globally

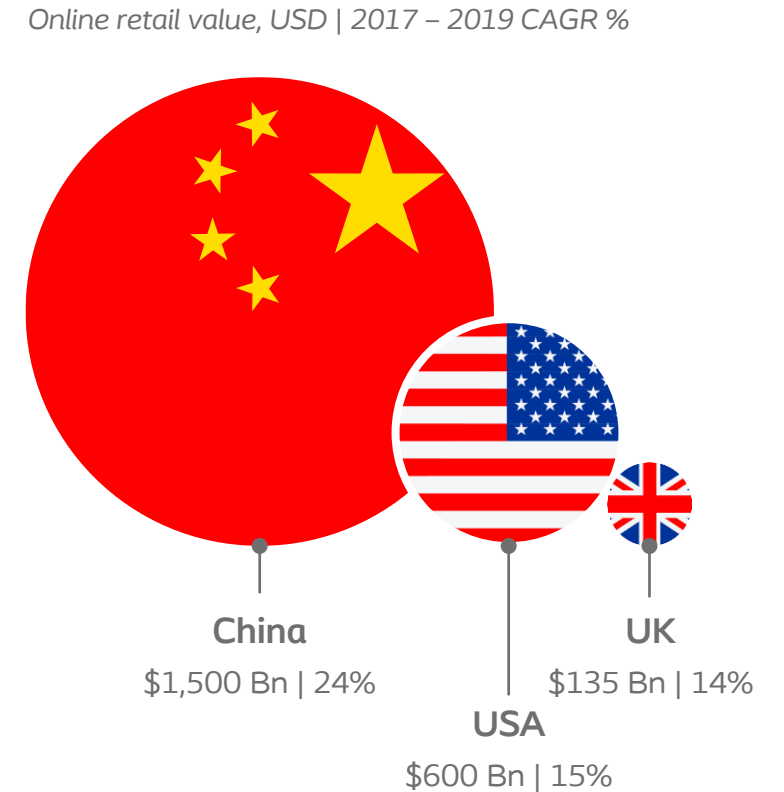
China is the largest contributor to world economy growth



China is the world 2nd largest and fastest growing med-tech market

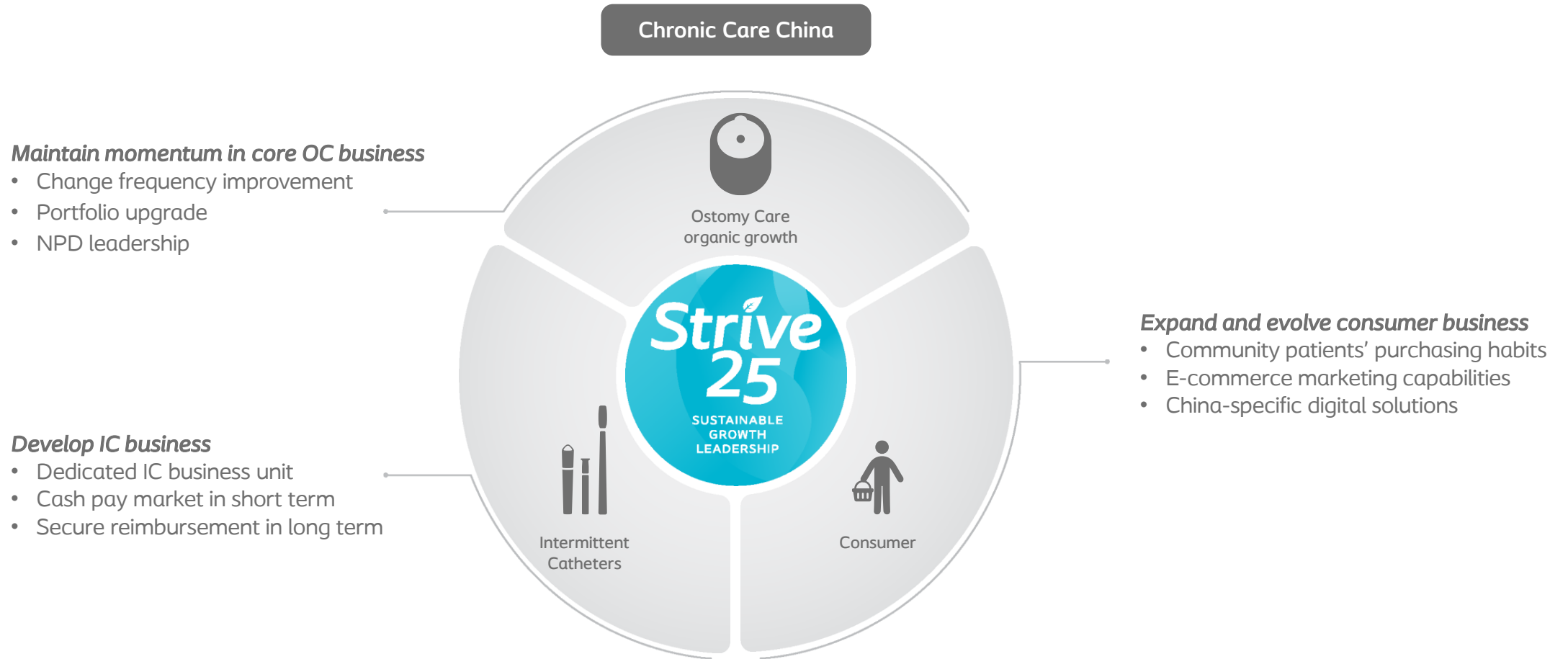


China's online retail market is large and growing fast



Note: Other emerging includes Brazil, Russia, India, Turkey and SEA
Source: IMS World review, EIU, World Bank

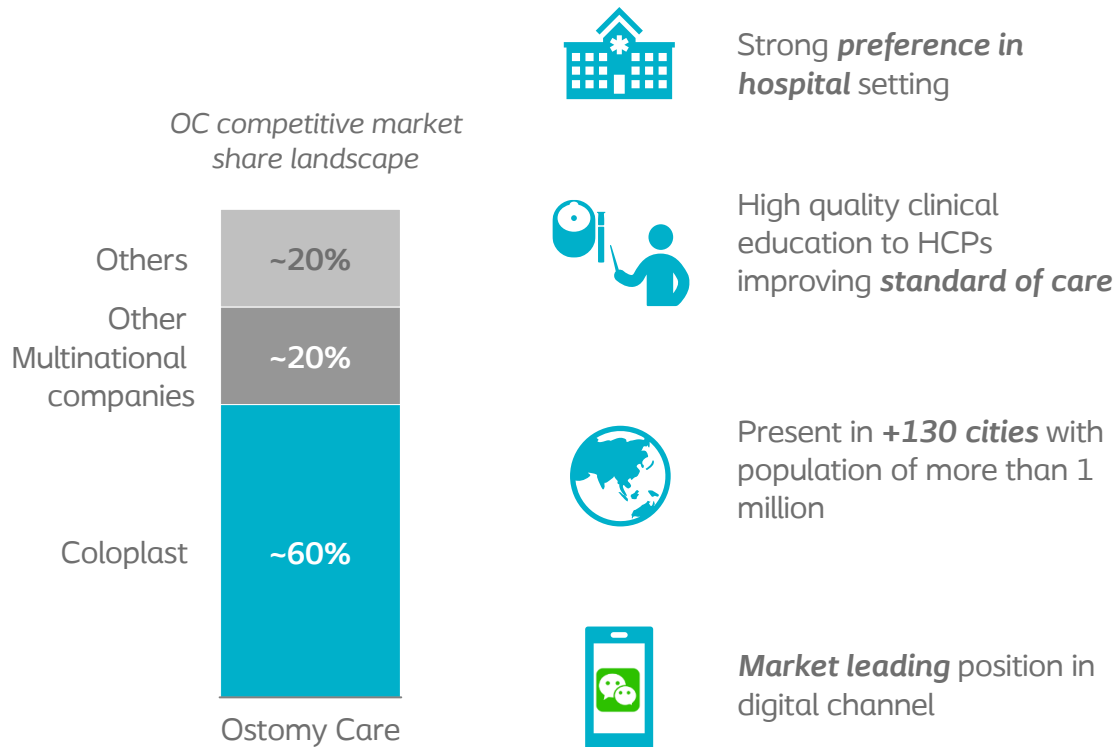
Strive25 focuses on the core while building new opportunities



With strong coverage and a broad product offering, Ostomy Care will remain the core of our strategy and growth

Coloplast is the market leader with strong coverage...

... and there are large opportunities for continued growth

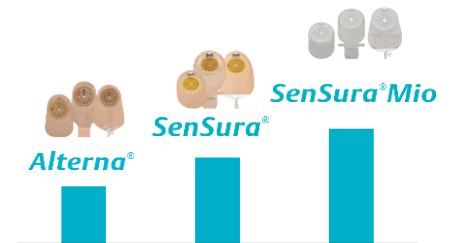


- Increase **change frequency**

- Further grow our **NPD share**

- **Strong offering across price points** expanded further with the newly launched **SenSura Mio**

- Increase **supporting products penetration & usage frequency**

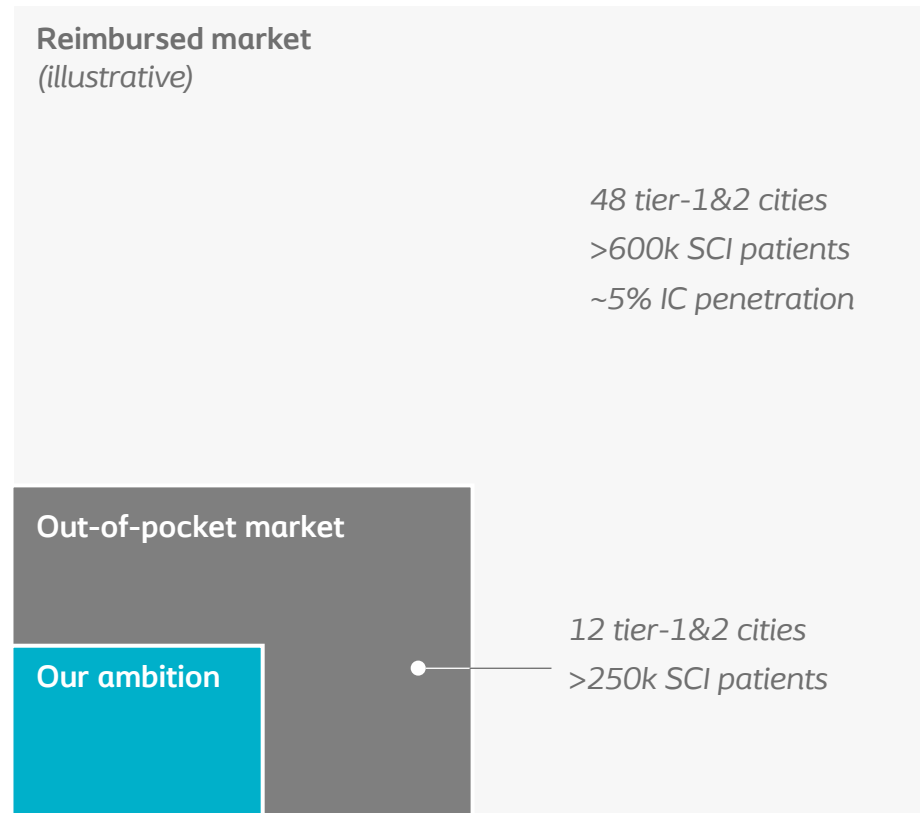


Source: Coloplast

We will develop the IC category in a selected number of high potential cities

IC is a large potential value pool but it is underdeveloped

IC market value



We will develop the market and drive profitable growth



Selective account coverage in high-potential cities



High quality clinical education to HCPs and consumers



Differentiated product offering between hospital and community

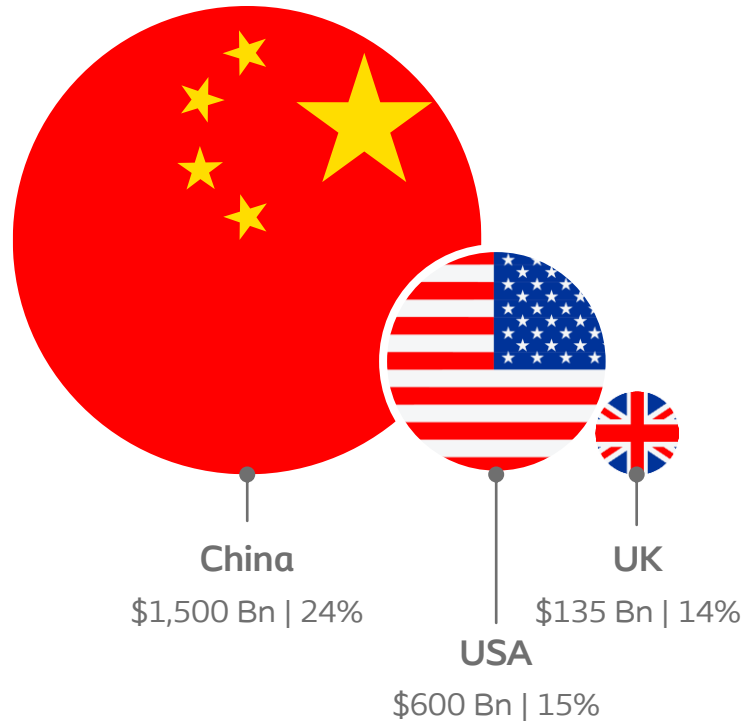


Extensive patient support including Coloplast Care and subscription services

We can leverage our online position to seize new opportunities

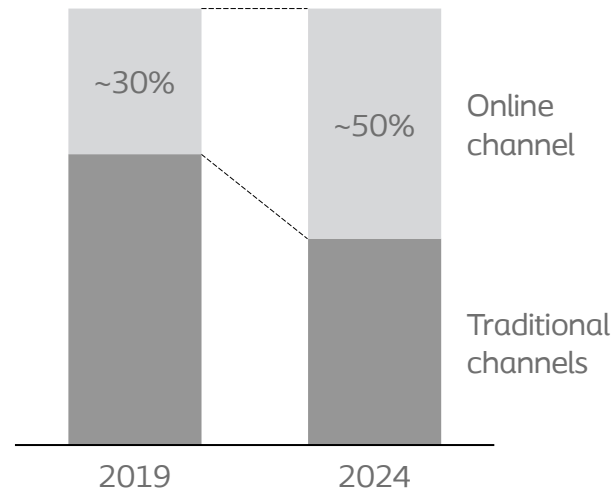
China's online retail market is large and growing fast

Online retail value, USD | 2017 – 2019 CAGR %



Medical consumables are also moving online

China OC market, channel value



We are leaders in all major online platforms

China OC online market, share of total



Source: Coloplast

China has the ambition to deliver strong profitable growth

China Chronic Care 2025 strategic themes



Our ambition for China Chronic Care



Ambition

Continue to outgrow the market

Market growth ~15%

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