

US Chronic Care

Challenger to leader

Tatiana

Coloplast Capital Markets Day 2020
Virtual break-out session
October 7th 2020
Manu Varma, SVP Chronic Care North America

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

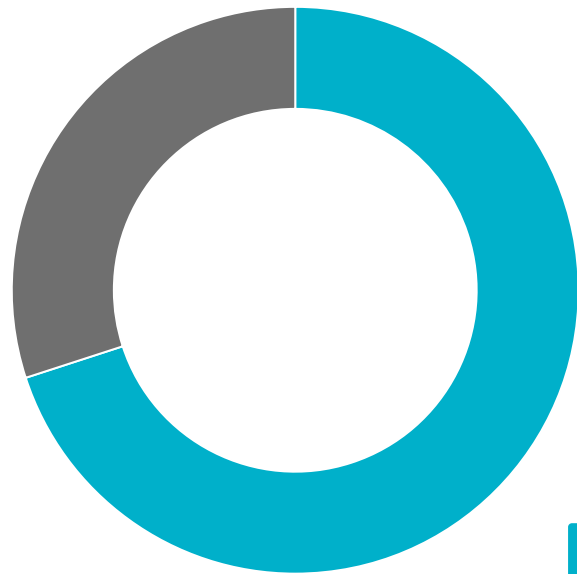
Making life easier



US Chronic Care has outperformed the market by a factor 2-3x and continues to take share

Chronic Care revenue in the US by business area

Revenue DKK, FY 18/19



New 5 year strategy in place



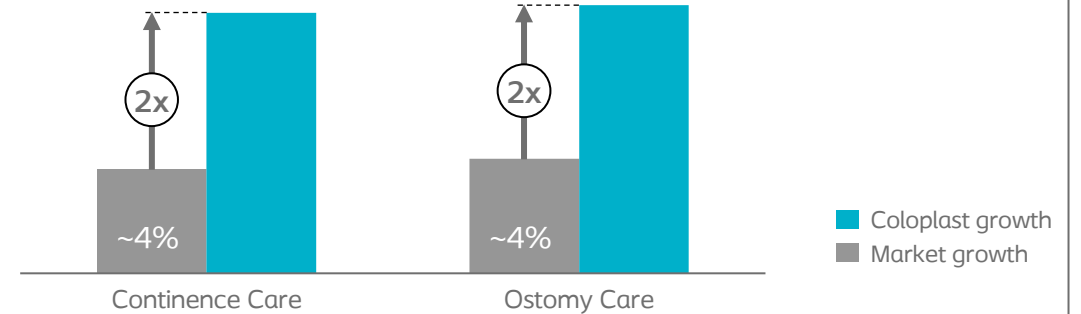
#1

growth opportunity in Coloplast

■ Contingence Care
■ Ostomy Care

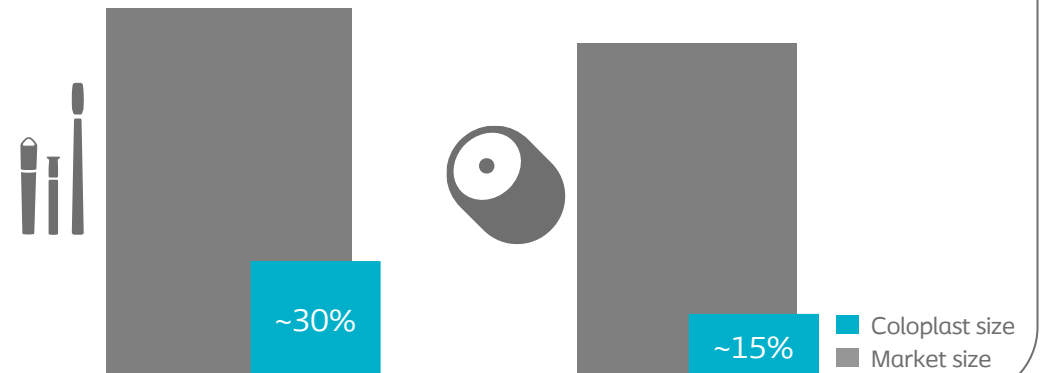
Chronic Care US organic revenue growth vs. market growth

FY 18/19



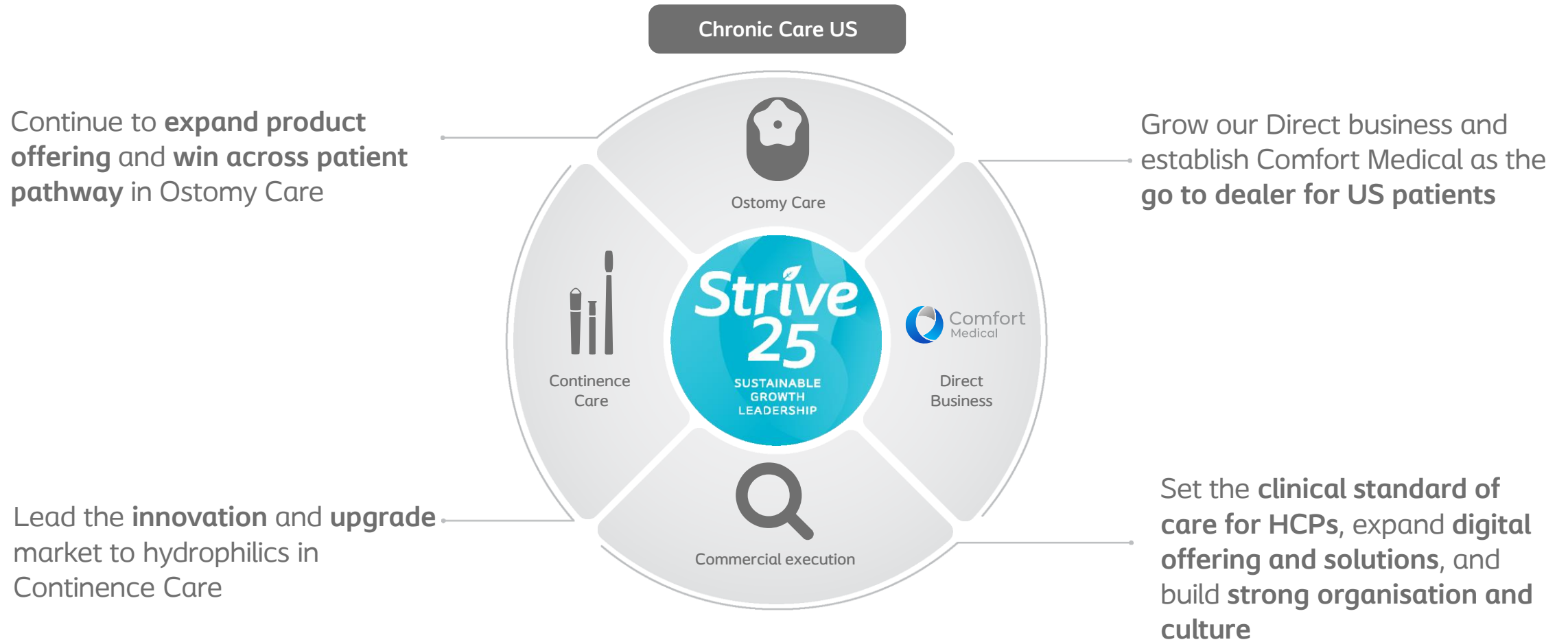
OC and CC manufacturer US market share

DKKm, FY 18/19



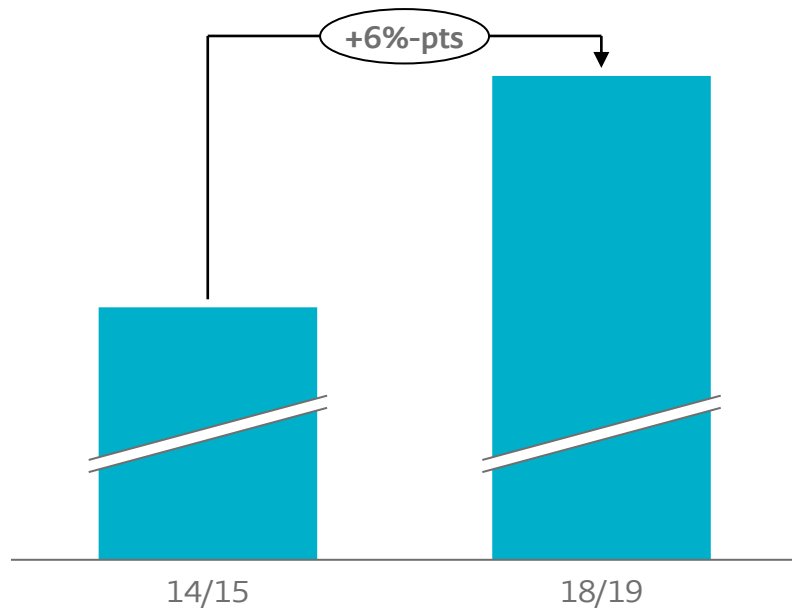
Source: Coloplast

Chronic Care US – Challenger to leader



In Ostomy Care, innovation is the biggest growth driver and we continue to win across patient pathway

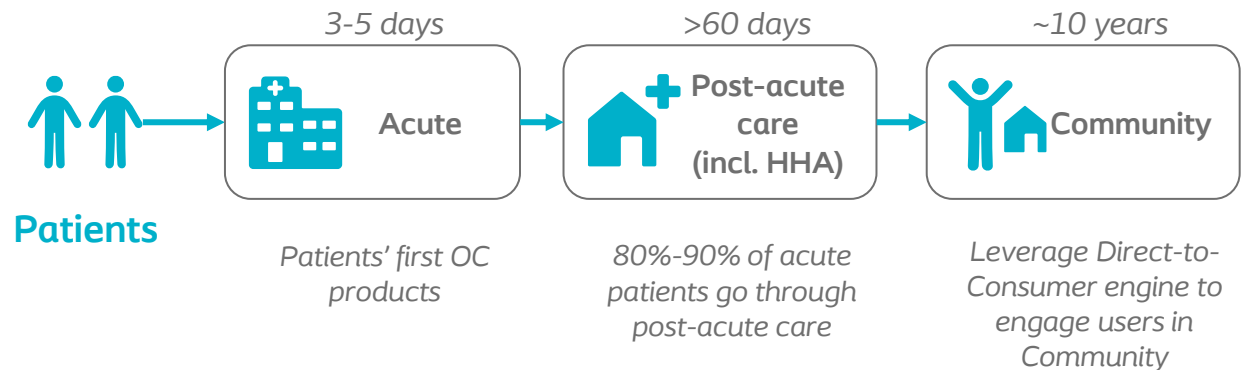
We have gained significant share over the last years
Bags & Plates acute share



Innovation is a key driver, and we will continue to expand our offering of high-quality products



Meanwhile, we continue to drive our penetration and win share across OC patient pathway



Coloplast continues to succeed in acute channel with Premier contract and large acute account wins

We have had major wins in the acute and post-acute care channel...



...And we are now the second largest player in the acute channel

Acute new patient discharged share

Hollister™, Incorporated

#1



#2

Starting April, Coloplast was awarded access to Premier, one of the largest GPOs in the US

	Acute members ¹	Estimated Acute share ²	Next award year
Premier™	3,600	~25%	2023
vizient™	7,500	~50%	2021
Health Trust™	1,400	~15%	2023

Source: Coloplast, GHX

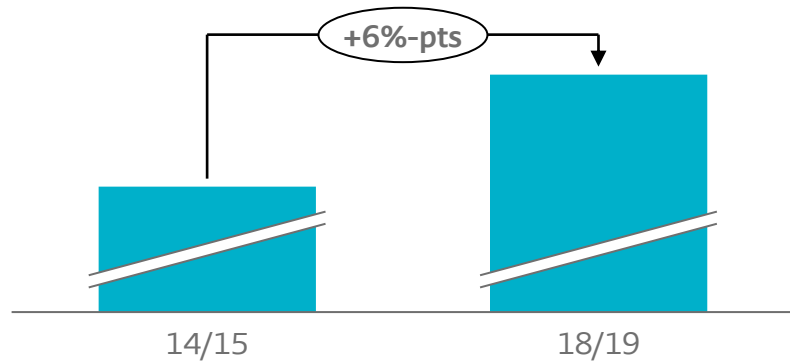
1. Acute members can be part of more than one GPO
2. Coloplast estimates based on primary GPO affiliation

* Third party trademarks are the property of their respective owner(s)

In Continence Care, we continue to upgrade the market through product innovations and expanded sales force

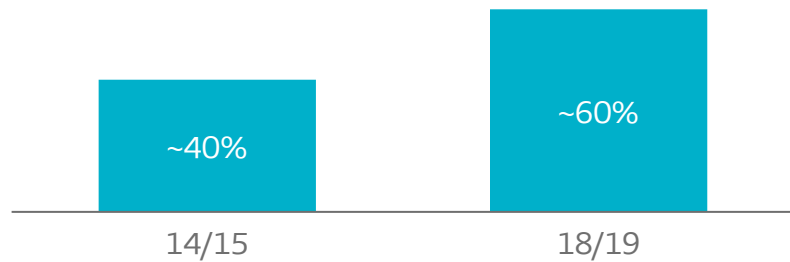
We have gained significant share over the last years

Coloplast Rehab NPD share



And hydrophilics is becoming the standard

Hydrophilics share of Coloplast US IC revenues



We have launched significant innovation and SpeediCath Soft is our latest launch

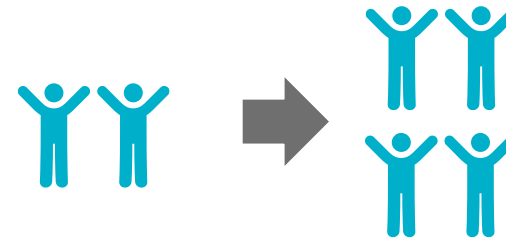
SpeediCath® Flex Coude Pro



SpeediCath® Soft

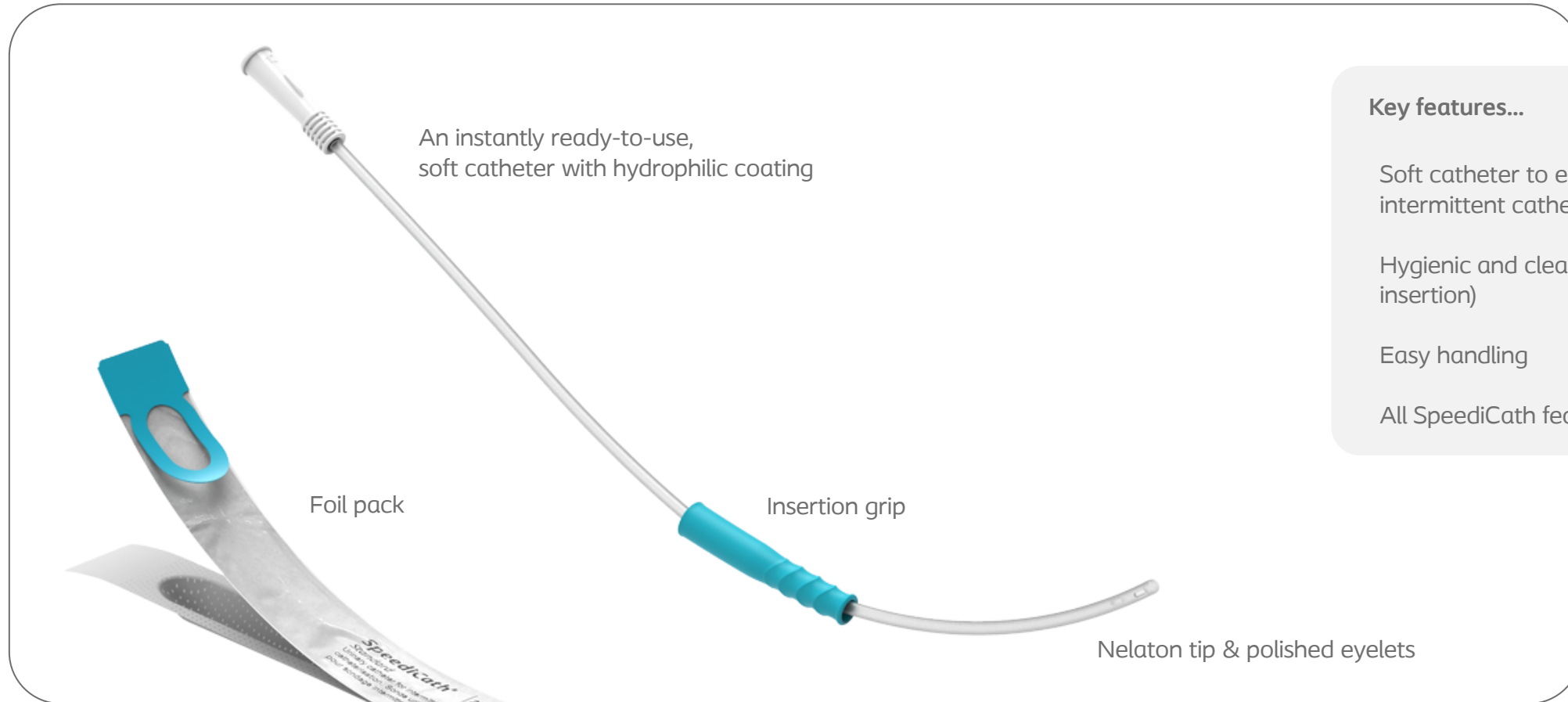


Meanwhile, with the largest manufacturer sales force which we expanded in 18/19, we will continue to focus on key channels



Introducing SpeediCath® Soft

– a soft hydrophilic coated catheter with insertion grip



We will take Comfort Medical to the next level with our *Strive25* strategy

We have been executing our growth plan for Comfort Medical during the past couple years and have achieved double digit growth



Drive **new patients demand**



Improve **retention** of existing patients

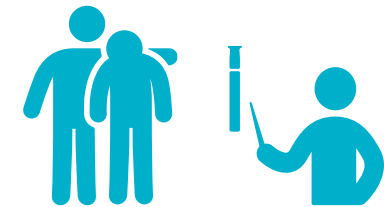


Expand **insurance coverage**

Although still a relatively small player, our Strive 25 strategy aims to establish Comfort Medical as the go to dealer for US patients



Strengthen **digital offering** for a superior customer experience



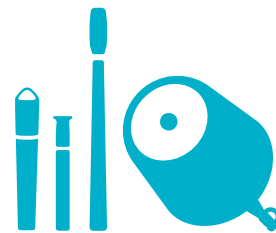
Focus on **patient support and education**

We are dedicated to making an impact by driving excellence in commercial execution

Strong commercial execution mindset runs across all functions in Coloplast



Set the clinical **standard of care** for **HCPs** through market development and education



Expand **digital solution and offerings** to empower end-users and navigate post-COVID world



Build **strong organisation and culture** through talent development and emphasis on Inclusion & Diversity

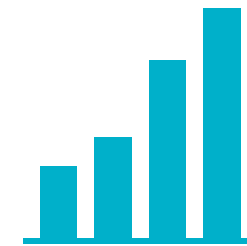
* Investment includes campaigns and related FTE costs

Our US strategy positions us to outpace the market for years to come

Our US 2025 strategic themes



Our ambition for US Chronic Care



Ambition

Double digit profitable growth

+10%

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