

Wound & Skin Care

Drive growth with 3DFit technology

Coloplast Capital Markets Day 2020

Virtual break-out session

October 7th 2020

Nicolai Buhl Andersen, EVP Innovation

Rasmus Hannemann, SVP Wound & Skin Care

Coloplast Group - Ostomy Care / Continence Care / Wound & Skin Care / Interventional Urology

Making life easier

Flemming

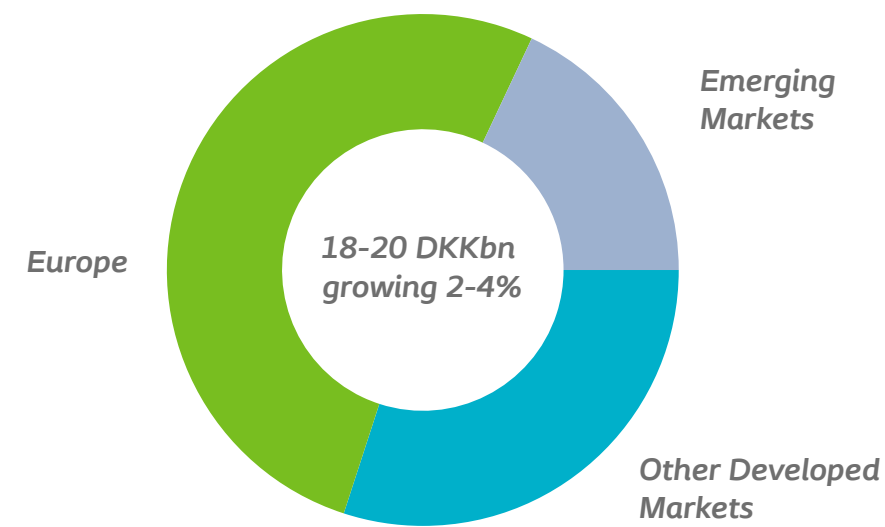


Key takeaways

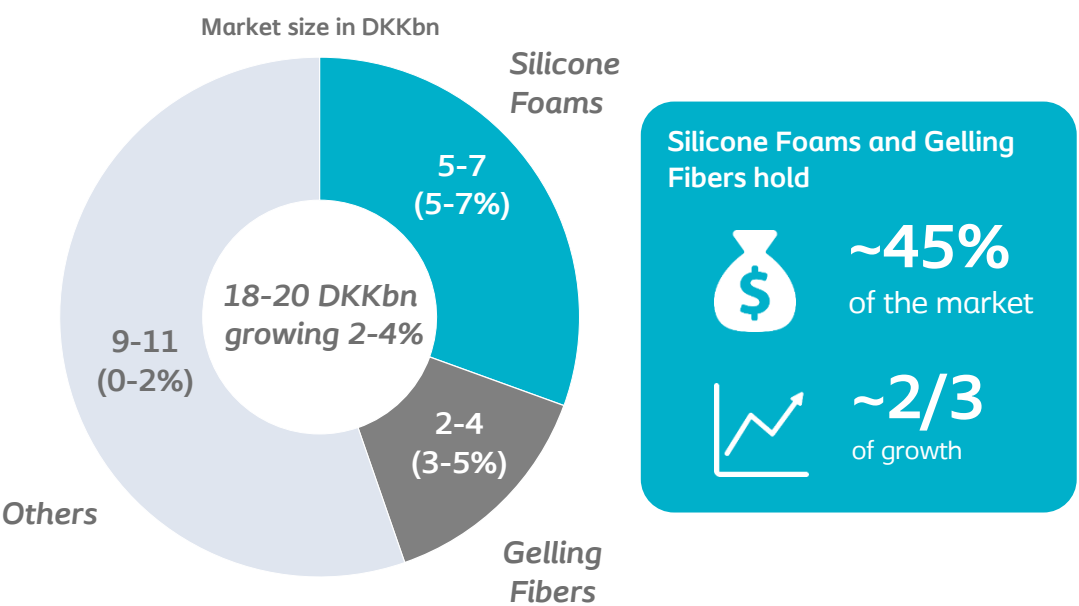
- 1 **Wound & Skin Care 2025 strategy** is centered around **focused category leadership** and our ambition is to **grow above market, scale the business** and **improve overall profitability**
- 2 **3DFit Technology** is our **point of differentiation** and we will **maximise** this opportunity through **new marketing** and **portfolio initiatives**
- 3 We have a **strong track record** across **EU markets** with **growth above market** and we want to build on this **positive momentum** going forward and scale in **China** and **US**
- 4 We will continue to **explore inorganic opportunities**

The global AWC market remains large and growing

The Advanced Wound Care market remains a significant value pool and continues to grow across all regions



Silicone Foams and Gelling Fibers are the two biggest categories and main growth contributors

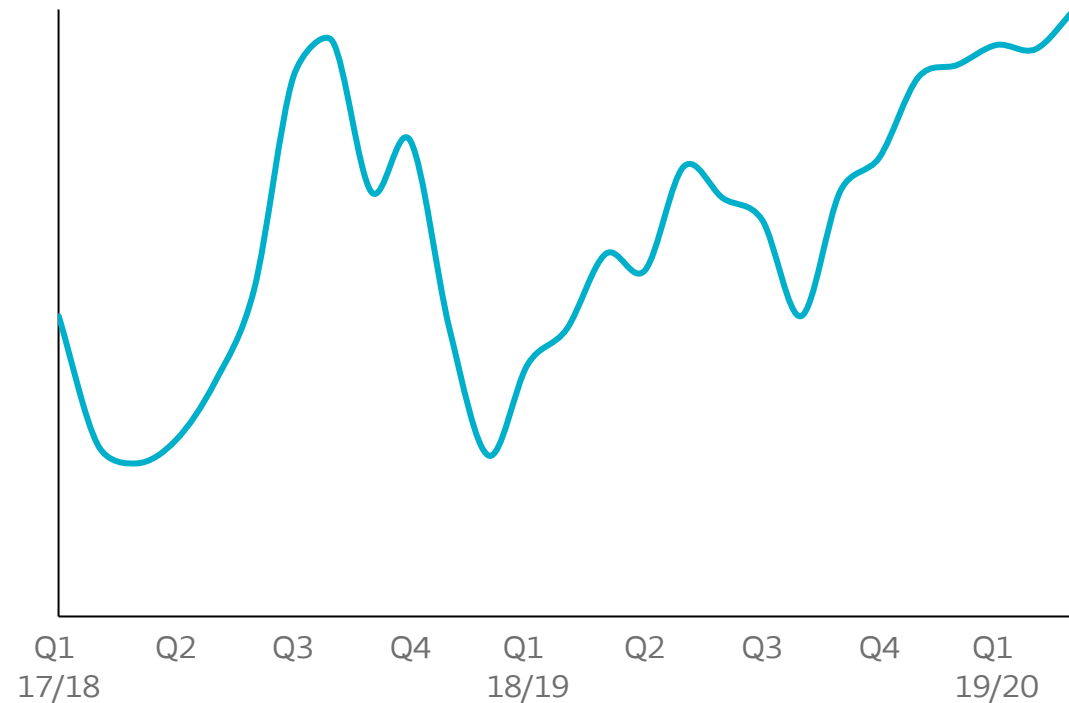


Source: Coloplast estimates

We saw an improving momentum in Wound & Skin Care until the COVID-19 outbreak

Positive sales momentum in Wound & Skin Care

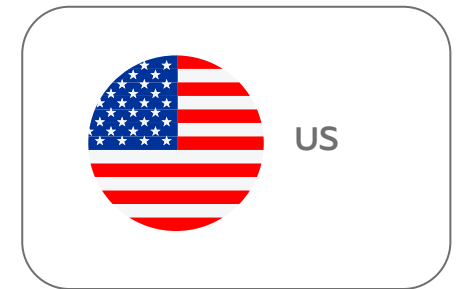
Global Wound & Skin Care MAT net revenue growth %



Key performance drivers



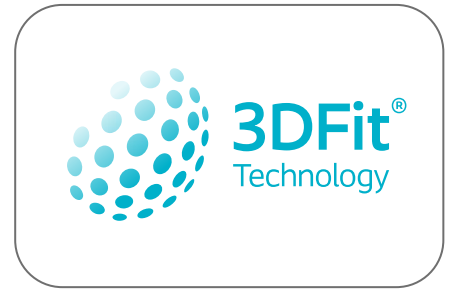
Europe



US



Emerging Markets



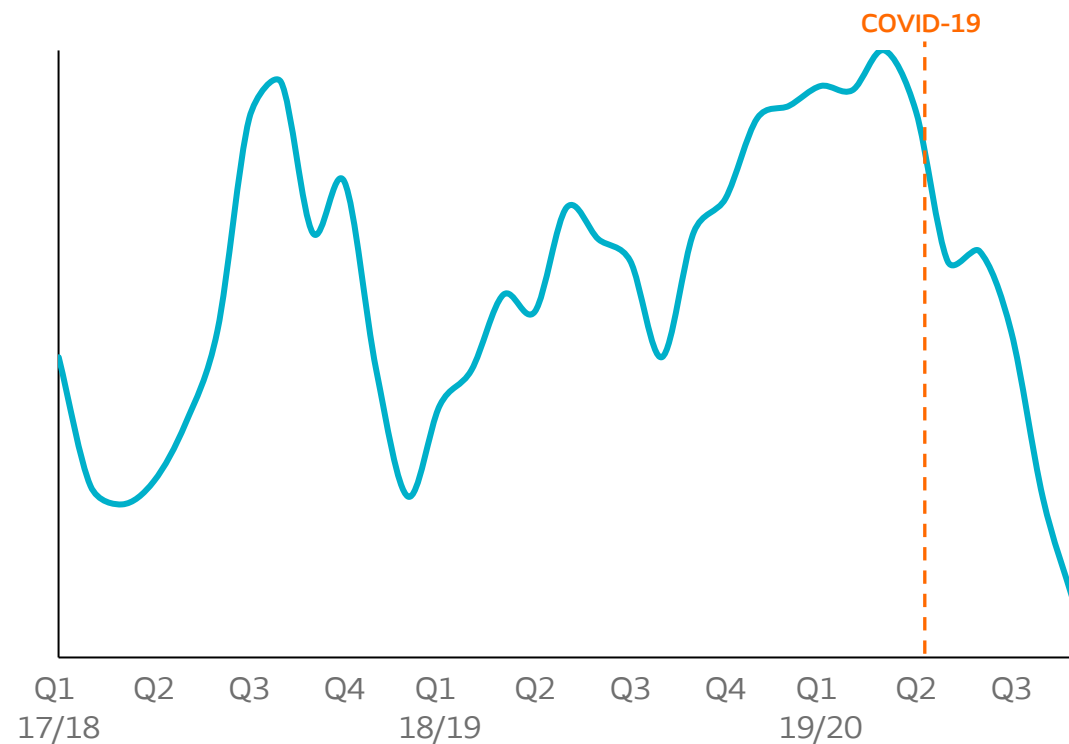
3DFit[®]
Technology

Note: Global Wound & Skin Care excluding the Compeed contract manufacturing business
Source: Coloplast

We have seen a negative impact from COVID-19 in China, France and US but the situation is slowly improving

Negative impact from COVID-19 outbreak since Q2 19/20

Global Wound & Skin Care MAT net revenue growth %



Biggest negative impact in China, France and US



China

- Significant decline in wound care procedures and hospital sales



France

- Decline in activity in the hospital channel and limited access to customers



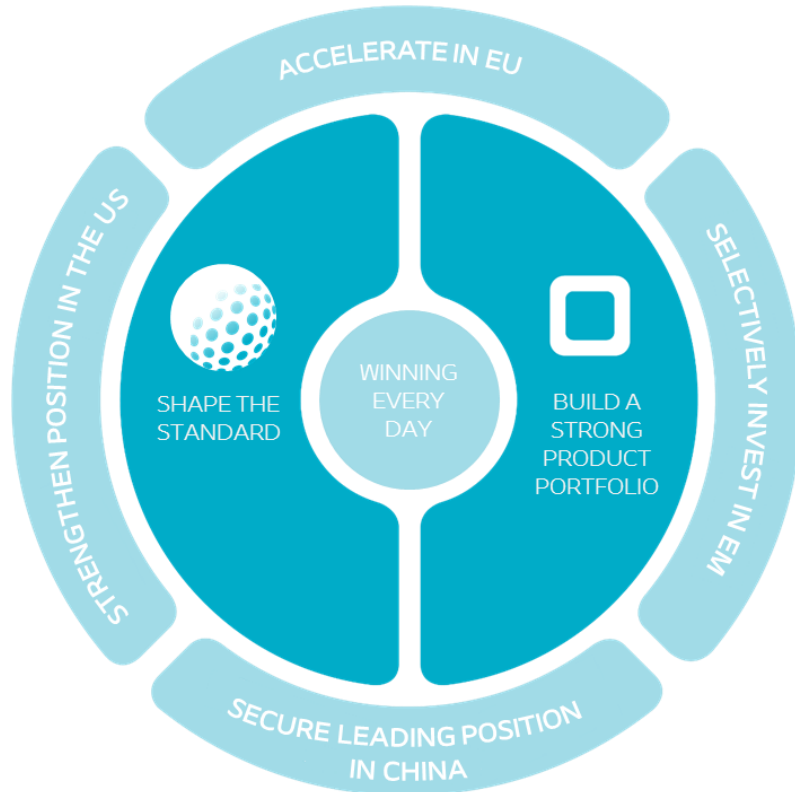
US

- Decline in Skin Care momentum which is correlated with the decline in non-covid hospital admissions

Note: Global Wound & Skin Care excluding the Compeed contract manufacturing business
Source: Coloplast

Key achievements during the LEAD20 strategy period

LEAD20 strategy



Key achievements



- ✓ **Strong track record** across **EU markets** with growth above market
- ✓ **New setup** and structure in **US and China**
- ✓ **Successful launch of 3DFit Technology** and **leadership positions** gains across key markets with **Biatain Silicone**
- ✓ **Successful launch of Biatain Silicone Sizes & Shapes, Biatain Fiber and Biatain Silicone Contact** with positive feedback

The Wound & Skin Care 2025 strategic plan



3DFit Technology is our point of differentiation

1

Consensus created on the need for 3DFit Technology



96% of KOLs state that exudate management is key

98% of KOLs state that managing the gap is important for effective wound healing

57% of KOLs state that a dressing needs to conform to the wound bed for optimal healing

2

3DFit Technology is clinically and scientifically proven



Leading conformability, absorption and retention capabilities

Retrospective case studies performed with 104 wounds

Prospective clinical trial on infected DFUs conducted

Study initiated on 50 patients to prove Biatain Silicone being less complicated and a more cost-effective treatment

3

We take leadership positions



Nr. 1 in the prescription channel in Germany in the silicone foam Ag category



UK is joint 1st for growth in the overall silicone market on an MAT basis

Market leading positions in the silicone market in regions South West and South East in the UK



Nr. 1 in the Spanish prescription market within the silicone sizes & shapes category

Biatain® Fiber with the unique HexaLock® Technology



Biatain® Fiber



Locks in exudate



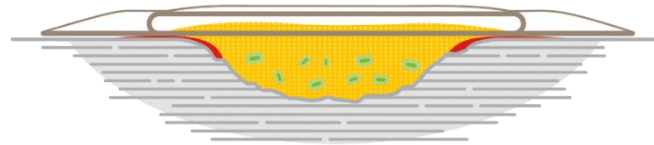
Minimal shrinkage



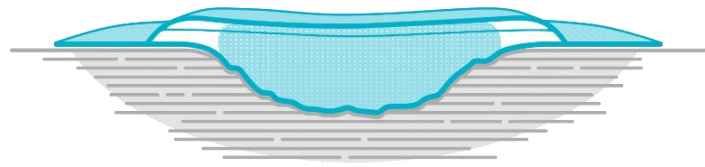
Cohesive gel

We are expanding our offerings to address deep wounds with Biatain® Fiber with HexaLock® Technology

Reducing exudate pooling requires a dressing that conforms to the wound bed



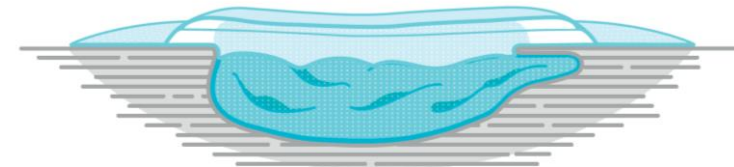
Wounds less than 2 cm



Biatain® Silicone



Wounds more than 2 cm



Biatain® Fiber



Biatain Fiber launch is off to a good start - HCP feedback confirms product performance and attractive value proposition

Key benefits vs. competition

Biatain Fiber



Less risk of maceration
due to hexagonal shape



Minimal shrinkage
minimising gap creation



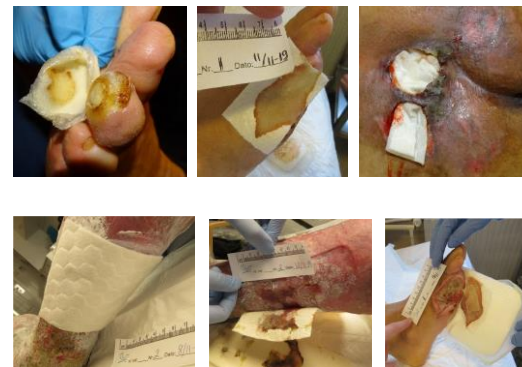
Easy one-piece removal
removal with minimal risk of residues in wound

Key competitor



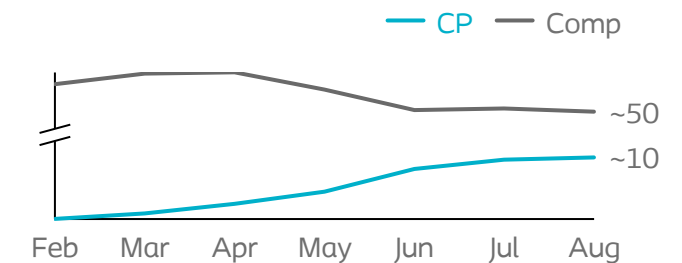
Positive feedback on product performance

- Clinical feedback confirms Biatain Fiber's strong exudate management properties
- A number of independent case studies and publications document performance and build credibility

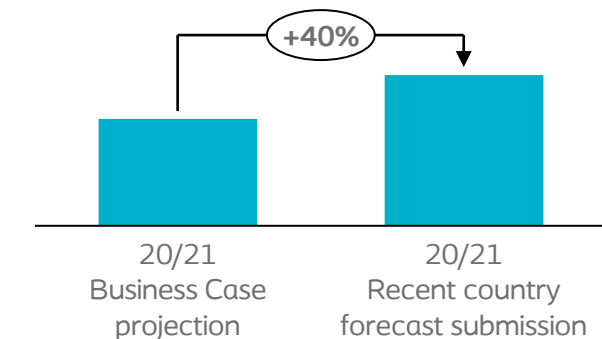


Performance is off to a good start

Germany community MS% development¹



Increased forecasts from key markets



¹ German community MS% gelling fibers. Source: ODV data, Insight Health

With *Strive25* we aim to scale the Wound & Skin Care business, grow above market and improve overall profitability

Wound & Skin Care 2025 strategic themes



Our ambition for Wound & Skin Care



Deliver growth above market



Scale business in US and China



Improve overall profitability



Explore inorganic opportunities

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