

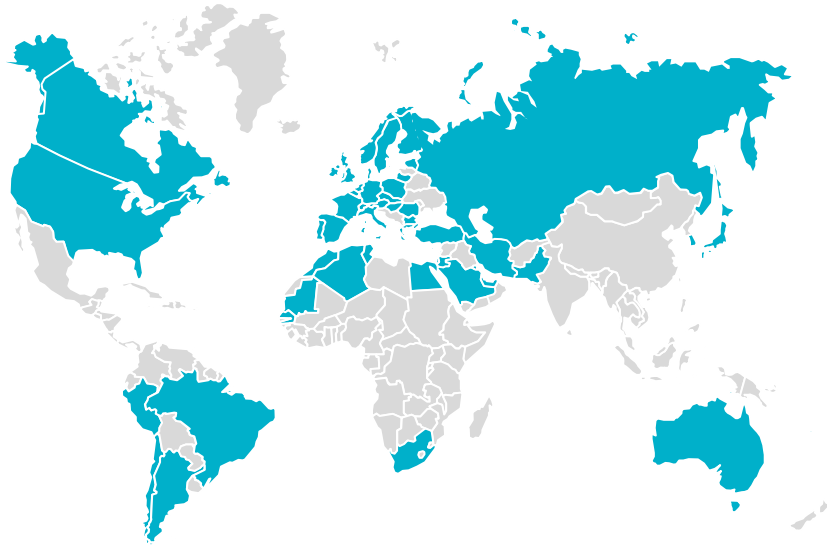


Maximize synergies to grow Urology Care globally

Coloplast Capital Market Day 2014
Steffen Hovard, SVP Urology Care

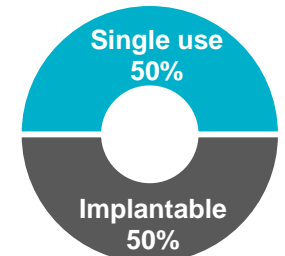
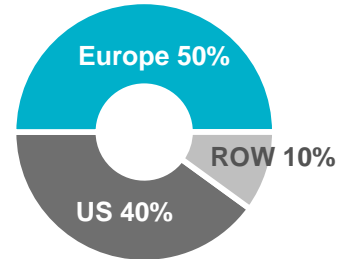
Introducing Urology Care

Urology Care geographical presence



Urology Care at a glance

- Broad and deep portfolio of implantable and single use devices for Surgical Urology Procedures
- Sales in approximately 70 countries (sales organisations in 19)
- Key regions: US, Europe, Japan, Australia, LatAm
- Approximately 650 employees including production
- DKK 1.1 billion revenue 12/13 (10% of Group)



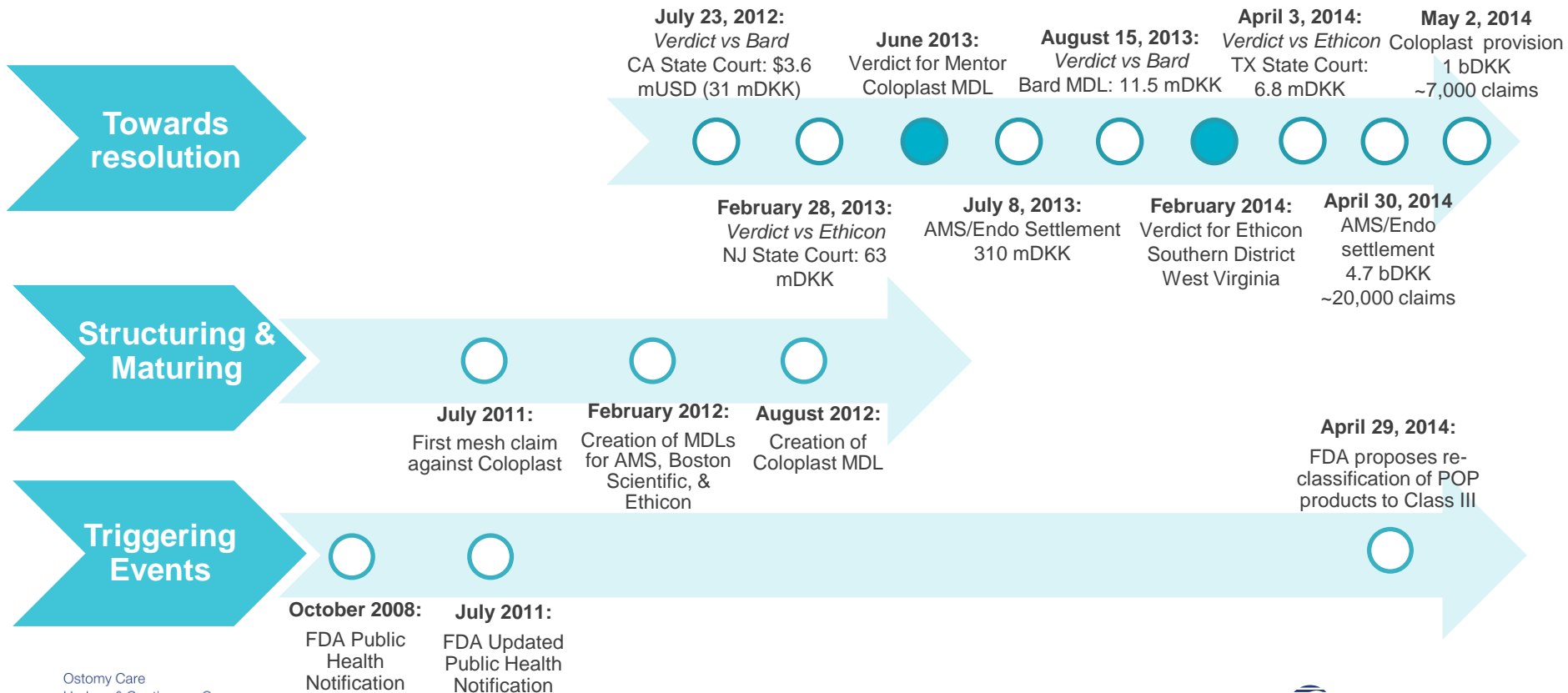
Source: Coloplast data
Ostomy Care
Urology & Continence Care
Wound & Skin Care

Urology Care market is worth DKK ~10 billion growing 3-5% - demographics and lifestyle changes drive market growth

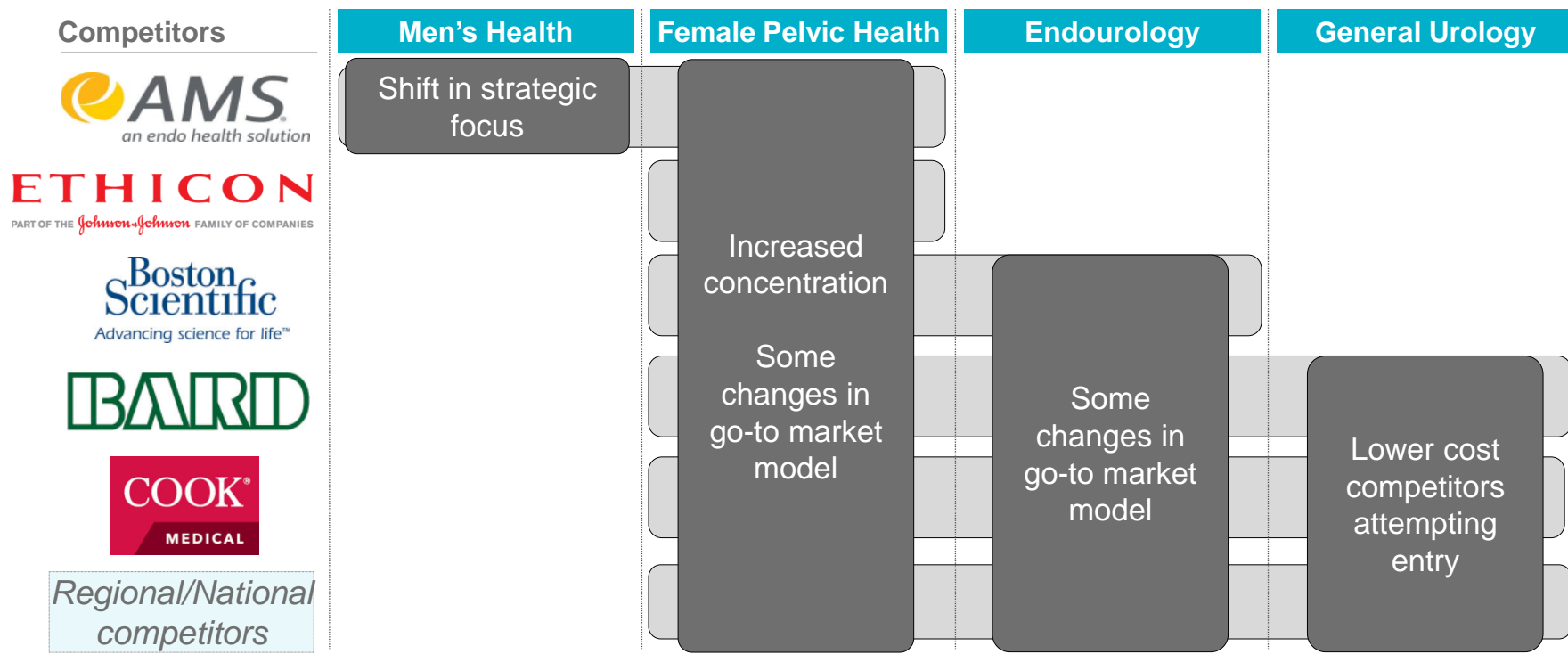
| | Endourology | Men's Health | General Urology | Female Pelvic Health |
|--------------------------------------|--|---|--|---|
| Addressable market In billion DKK | <p>~5% → ~3</p> | <p>~4% → ~2</p> | <p>~3% → ~2</p> | <p>~3% → ~3</p> |
| Dynamics | <ul style="list-style-type: none"> Primary procedure is stone management Towards procedure efficiencies (e.g. value added devices, time reduction) Single-use devices | <ul style="list-style-type: none"> Consists of penile and incontinence implants Continued increasing market penetration | <ul style="list-style-type: none"> Wide range of urology procedures e.g. BPH and hospital continence mgmt Cost efficiencies remain important Single-use devices | <ul style="list-style-type: none"> Pelvic organ prolapse and stress urine incontinence implants Towards minimally invasive procedures |

Source: Coloplast estimates
Ostomy Care
Urology & Continence Care
Wound & Skin Care

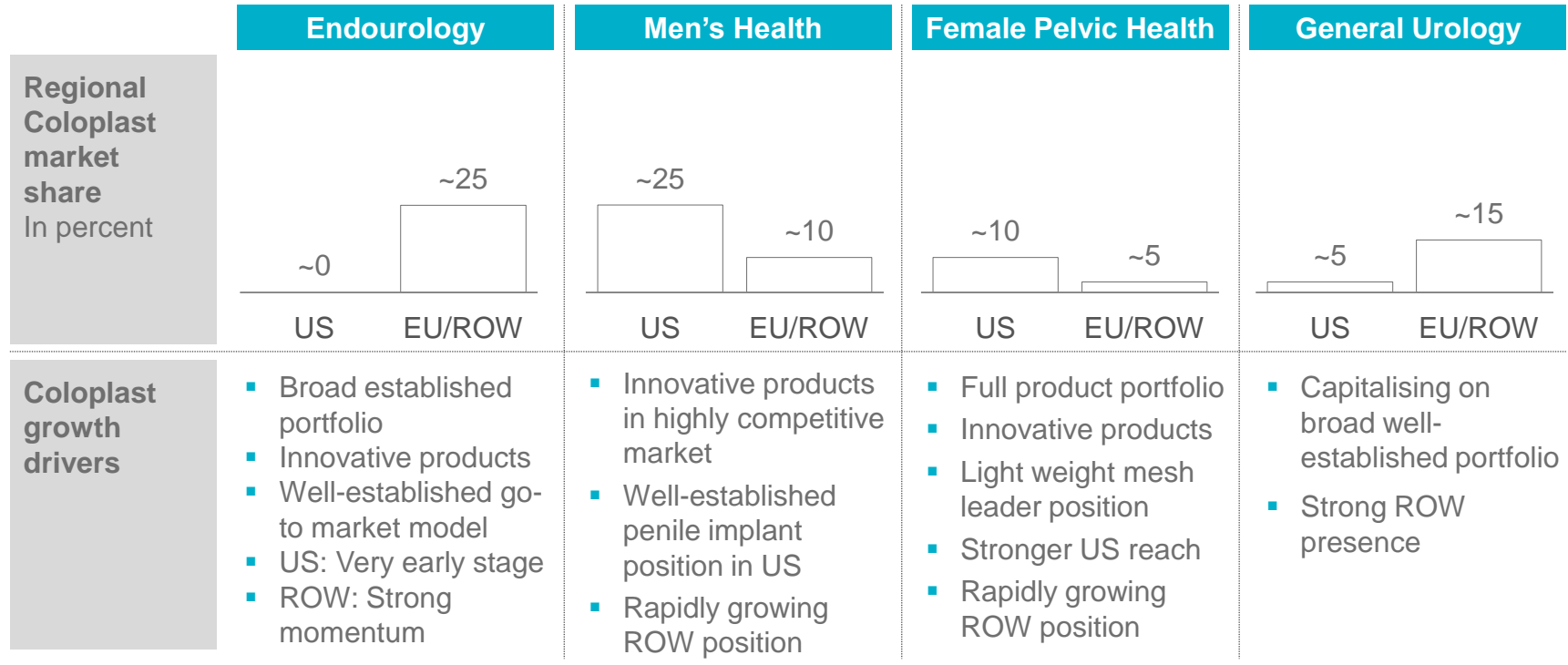
Mesh litigation status & events leading up to 1 bDKK provision



We meet the same handful of competitors across segments and geographies – homogenous global competition



Coloplast enjoys 10-15% global market share, and is well positioned to expand further



Source: Coloplast estimates
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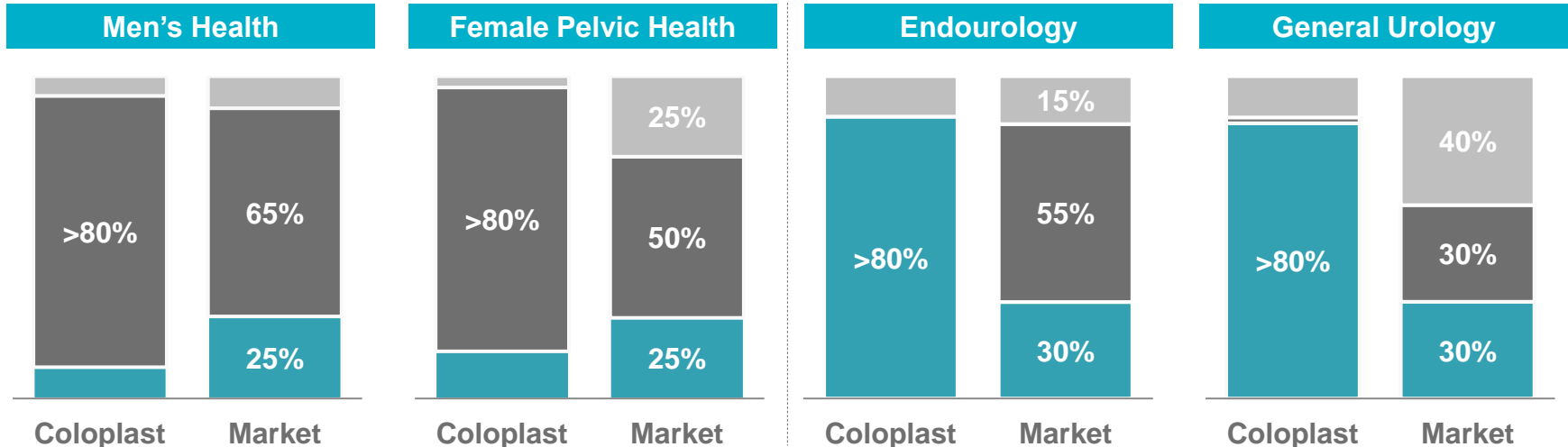
Product area revenues have regional strongholds, forming the basis for a globalisation built on proven concepts

Urology Care 12/13 revenue by segment & geography vs. the market

- Europe
- North America
- Rest of World

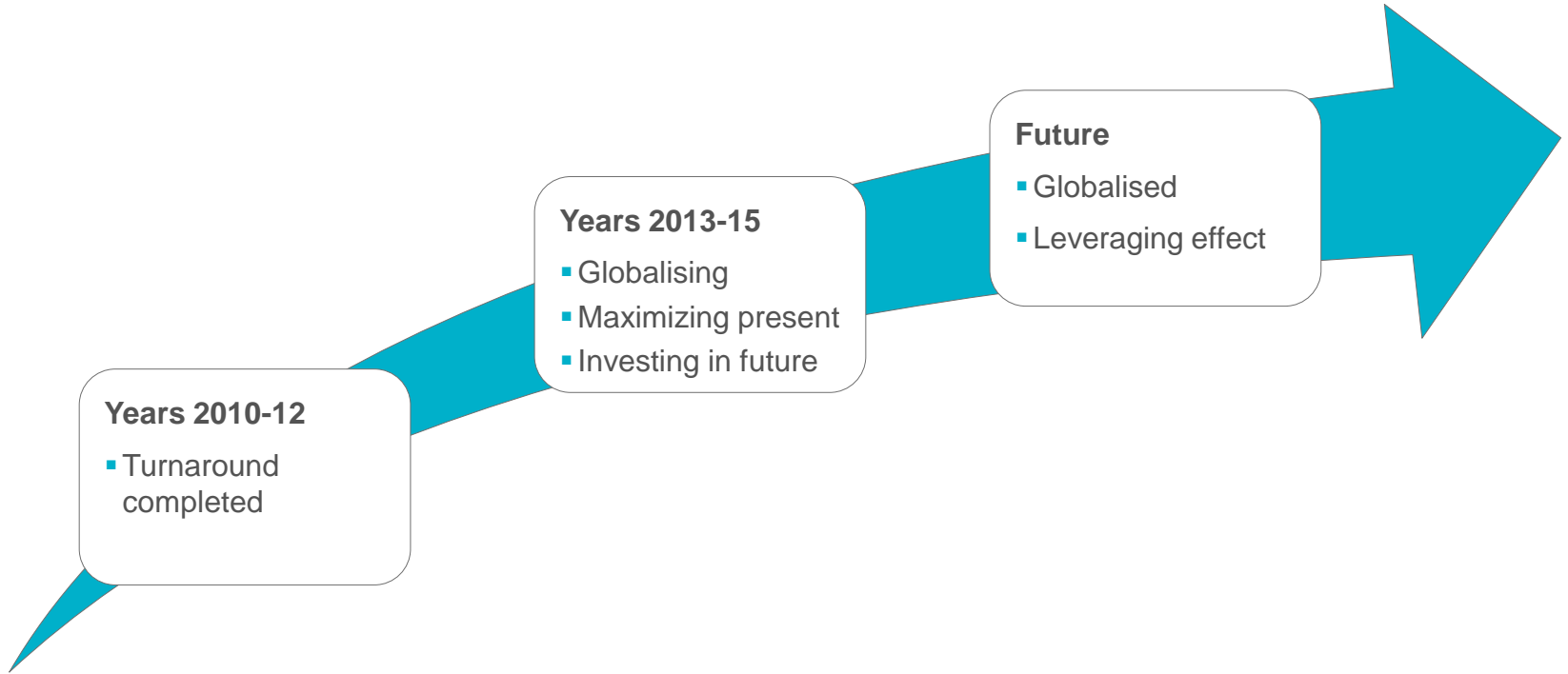
- Implantable device stronghold in North America -

- Single use stronghold in Europe -



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The business is set-up for globalisation, and synergies will drive significant scale and leveraging effects



Priorities to maximize revenue synergies are clear...

Commercial expansion



- Expand **commercial reach** in existing geographies
- Expand **geographical reach**

Advance Endourology



- Drive **innovation**
- Comprehensive **portfolio**
- Strengthen **EU**
- Penetrate **US**

Strengthen FPH position



- Capitalize **mesh leadership** position
- **Globalize** portfolio
- Continued **Altis®** roll-out
- Committed to FDA required **522 studies**

Innovation & launches



Retrace®



No-Tip™



**Zero Degree™
Titan Touch™**



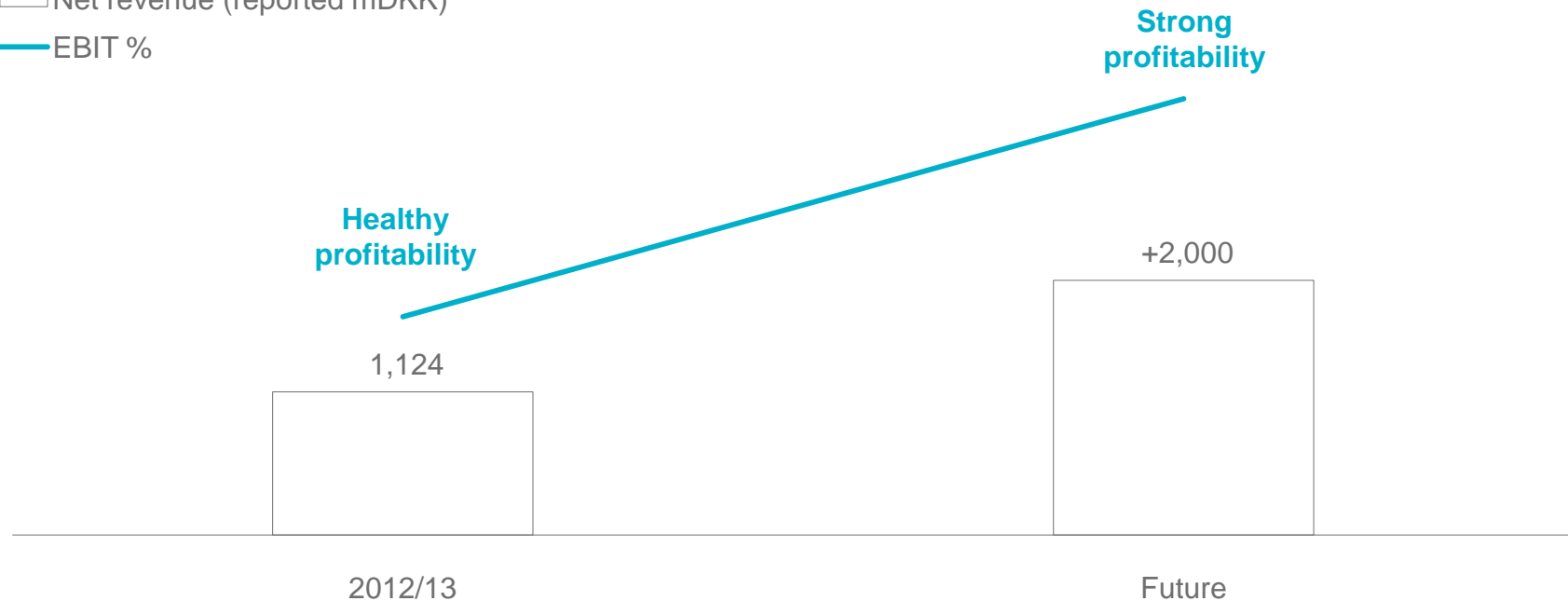
Altis®

...and leads towards the ambition of doubling the business

Coloplast Urology Care performance

□ Net revenue (reported mDKK)

— EBIT %



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