



Chronic Care

Coloplast Meet the Management London 2017

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



Chronic Care represents more than 75% of Coloplast sales and we continue to outgrow the market

Chronic Care sales, in DKK

FY 15/16



>75%

of Coloplast sales

11.4

billion of DKK annual sales

#1

global position

- Chronic Care
- Rest of Coloplast business

Chronic Care sales in DKK by BA

FY 15/16



- Ostomy Care
- Contenance Care

Chronic Care sales in DKK by region

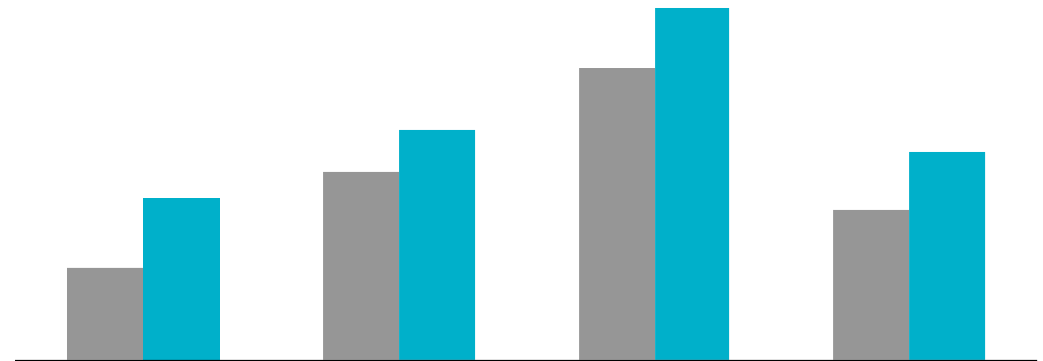
FY 15/16



- Europe
- Other Developed
- Emerging Markets

Chronic Care reported sales growth vs. market by region, %

FY 15/16



- Coloplast growth
- Market growth

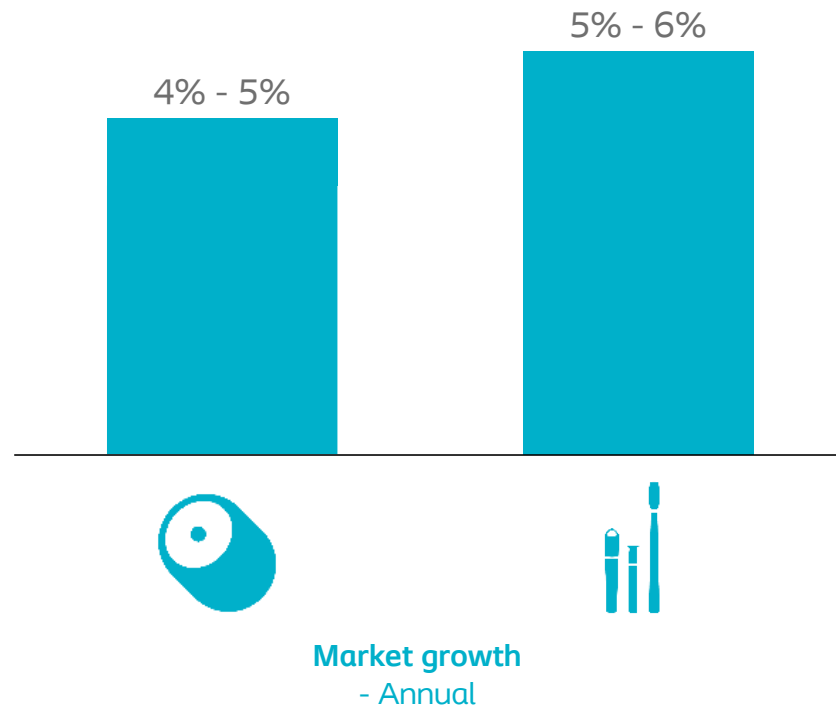
Market growth drivers

- + Clinically differentiated products
- + Growing elderly population
- + Consumption patterns change towards more advanced product solutions
- Cost pressure and demand for value from payers
- Earlier detection and cure

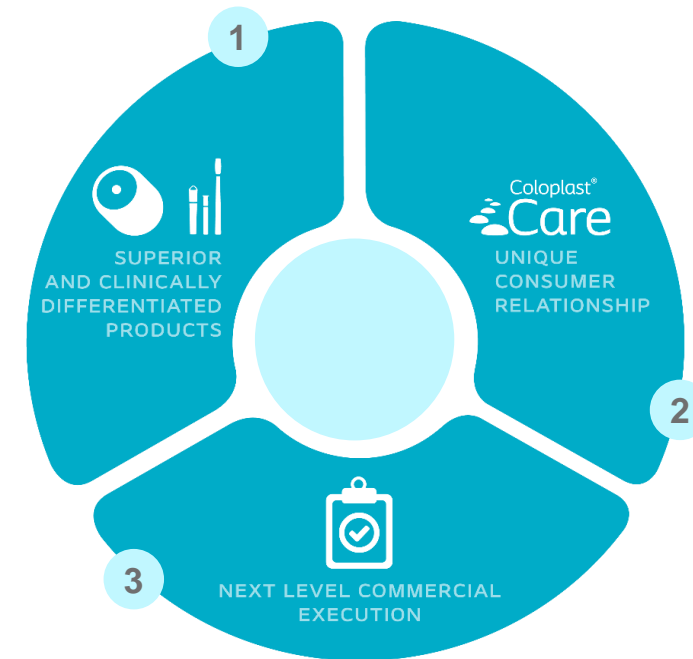
Source: Coloplast

Our ambition remains to grow faster than the market driven by our 3 strategic themes

Our revenue ambition is to outgrow the market



Our strategic themes



Source: Coloplast

New product launches and upgrades have contributed significantly to our growth

Innovative products

SenSura[®] Mio Convex



SpeediCath[®] Flex



Brava[®] Protective Seal



Key growth drivers

Win with SenSura[®] Mio platform

Growth driven by SenSura[®] Mio Convex

SenSura[®] Mio Convex capacity issues solved

SenSura[®] Mio Hospital Assortment in 5 countries

Drive growth through SpeediCath[®] family

SpeediCath[®] Flex in 14 countries

SpeediCath[®] Standard BBT (Bacteria Barrier Technology) launch in 2018

Limited patent exposure - expected to be up to 100 DKKm

Maximize value from Brava[®] launches

Solid growth in Brava[®] portfolio

Brava[®] Protective Seal in 13 countries

Care and DtC remain a cornerstone in our transition towards a consumer healthcare company

We continue to expand our Care program ...

Care countries
+20

Care enrolments
>500,000

Care enrollments growth (yearly)
15 – 20%



... and have DtC marketing in all key markets

Global online marketing program ...



+

... local Consumer marketing capabilities and call center ...



=

... enabling successful product launches

SenSura® Mio Convex



SpeediCath® Flex



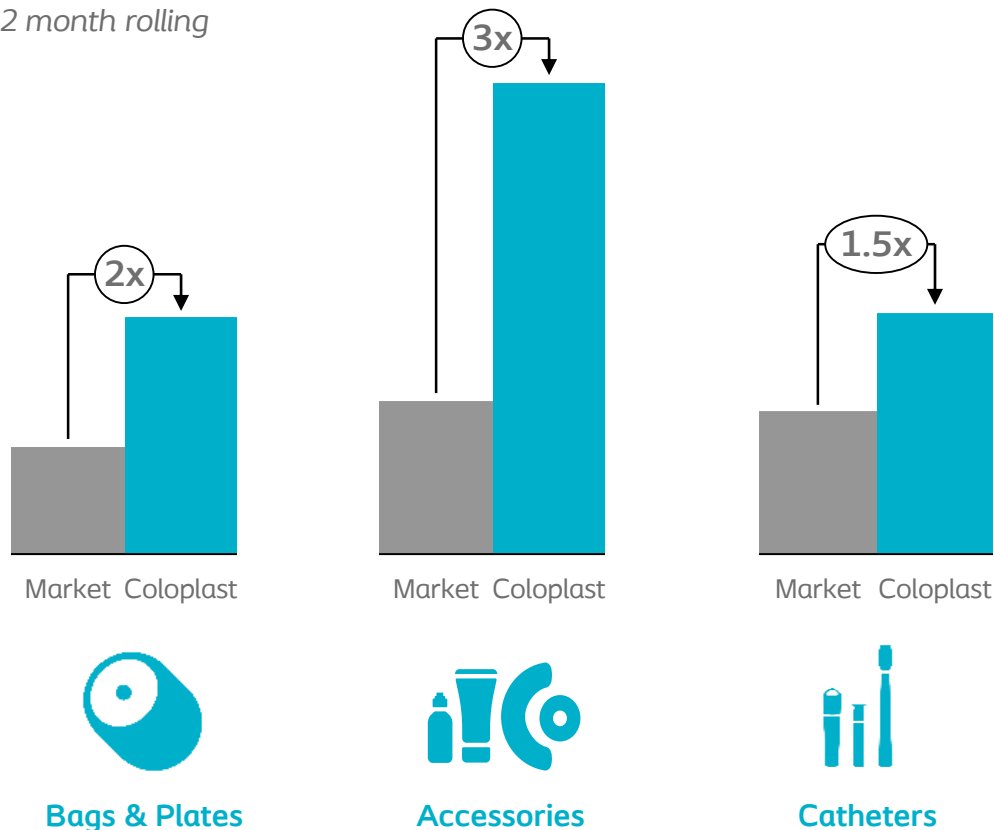
Brava® Protective Seal



Continued above market growth rates in US expected through superior products and consumer efforts

Coloplast sales vs. market growth

12 month rolling



Source: Coloplast

Key growth drivers



Challenge the market leader in Ostomy Care

- Winning in the acute channel
- Delivering unique value proposition for users and hospitals



Make hydrophilics the standard

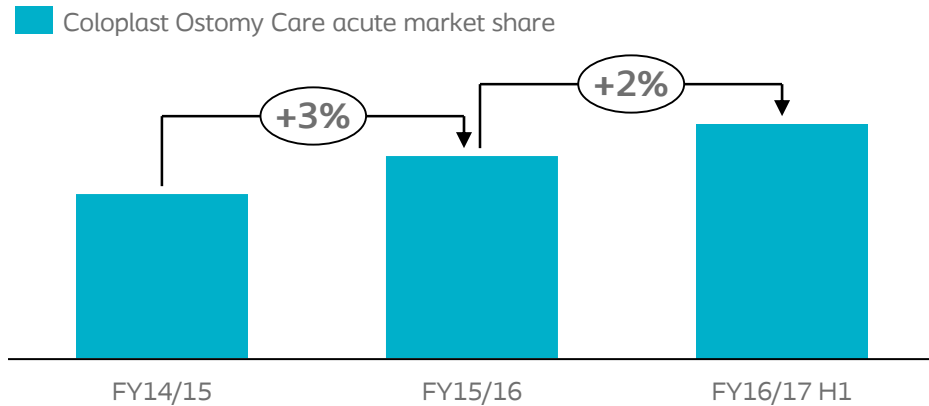
- Winning in rehabs with SpeediCath®
- Securing innovative product access and strong patient service



Growth ambition
+10%

Ostomy Care: Challenge the market leader

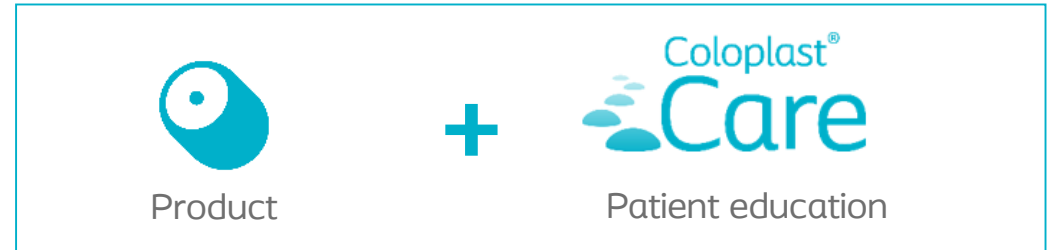
Winning in the acute channel



Continuation of proven IDN strategy

- Large number of hospital and IDN wins, e.g. Yale Newhaven, University of Maryland, Beamont
- Strong opportunity pipeline to ensure continued community growth – current community market share is ~15%
- Experienced frontline leadership – OC expansion near-term
- Re-launch of SenSura® Mio Convex
- Double digit growth in Accessories

Delivering unique value proposition for users and hospitals

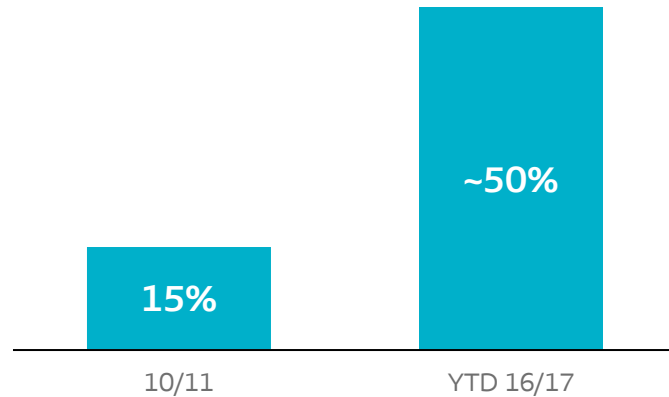


Source: GHX and Coloplast

Continence Care: Make hydrophilics the standard

Hydrophilics becoming the standard

■ Hydrophilics share of Coloplast IC revenues

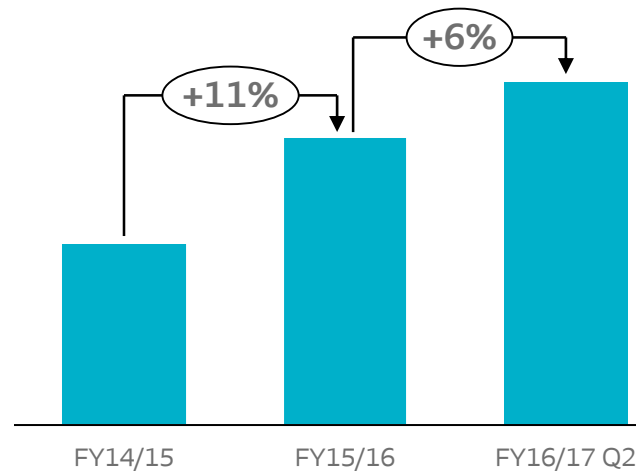


- Demand for hydrophilics growing as awareness continues to increase – now also driven by SpeediCath® Flex

Source: GHX and Coloplast

Strong performance in rehabs

■ Coloplast NPD share gain in rehabs



- Strong NPD share gains in rehabs – SpeediCath® is a key driver
- Strong NPD performance will support continued community growth – current community IC market share is ~30%

Securing innovative product access and strong patient service

Secure patient access to our products

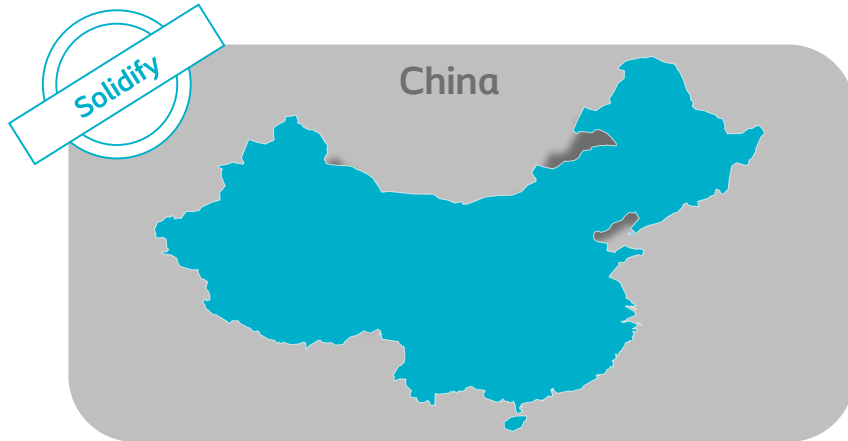
Business model with proven commercial concept

Scalable platform to drive further growth



Solid growth is expected in China - Pacific and Emerging Markets remain key investment areas

Further solidify position in China



- Stabilized market albeit at lower absolute growth rates than historical at approx. 15%
- Solidified position in top 100 cities
- People turnover now stable at healthier level
- Selected new investments into sales force, consumer and digital (e.g. Tmall)

Growth ambition is to outgrow the market

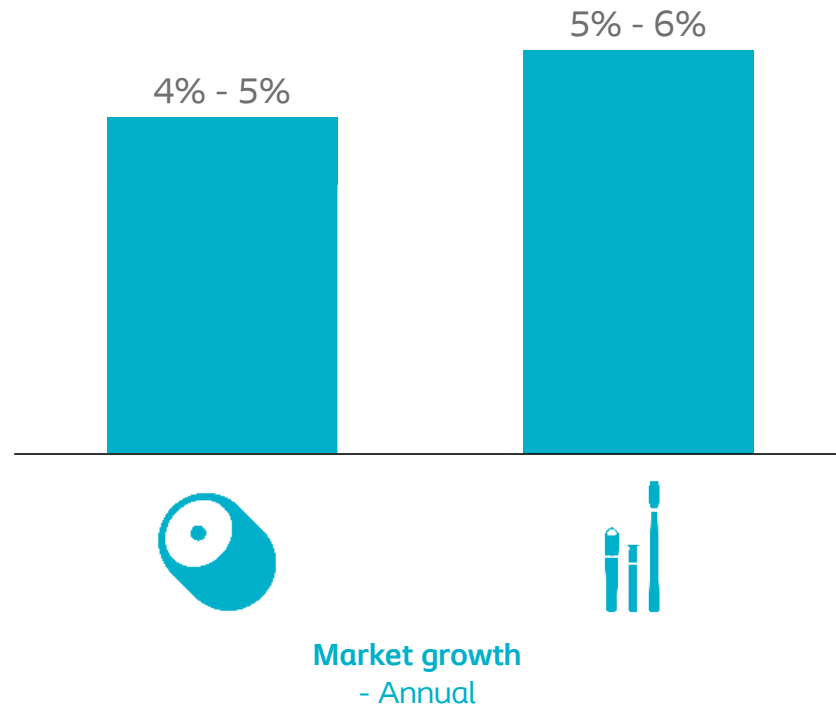
Scale up in Pacific and Emerging Markets



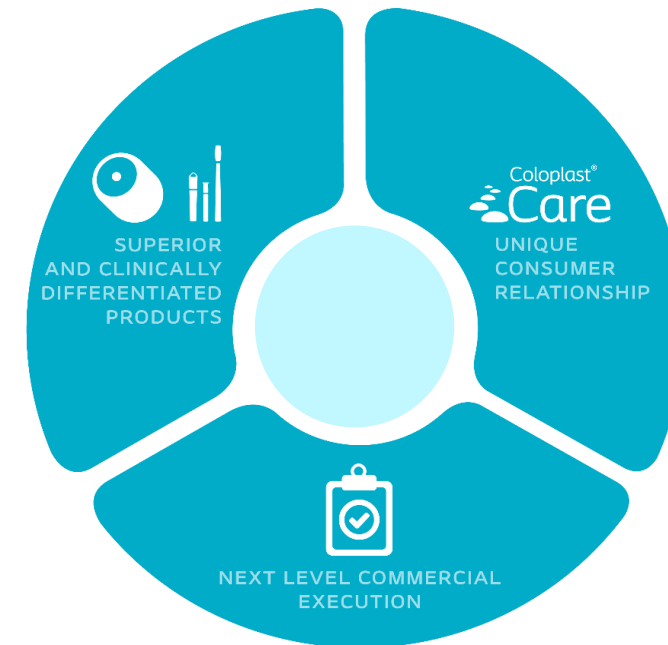
Source: Coloplast

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Our strategic themes



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