



reddot award 2017
winner

Wound & Skin Care

Coloplast Meet the Management London 2017

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



A year ago we launched a new ambition for our business ...

Shape the
standard of care

Double
our business

Become a truly
global player

...as scaling the business will be the key driver of improved profitability

... with 6 clear “execution themes”

1 Shape the standard

- **Together with HCPs create a shared standard for wound treatment** by expanding the awareness and understanding of the Triangle of Wound Assessment framework

2 Build a strong product portfolio

- Build a **focused AWC product portfolio** building on our **Biatain** success, adding new innovative **product categories**, and expand our **Skin Care** offerings

3 Accelerate in EU

- **Build upon our solid infrastructure and Biatain success** with selected investments in further commercial activities and sales pressure

4 Strengthen position in the US

- **Expand** current **commercial infrastructure** and broaden product **portfolio for skin care** and **wound care**

5 Secure leading position in China

- **Sustain dominant position** through commercialization of **Biatain** and strong customer educational service offerings

6 Selectively invest in EM

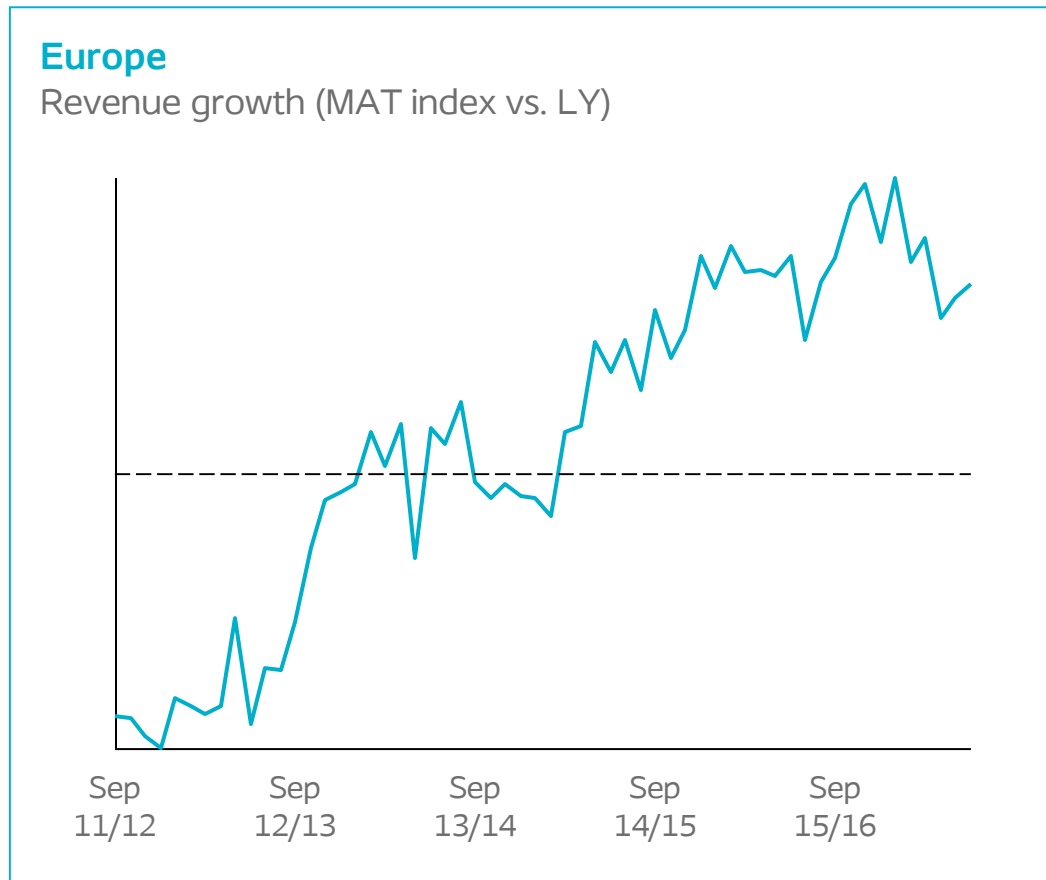
- Maximise the value of **current market positions** and invest in building in **selected new markets**

We continue to take market share in Europe but momentum impacted by negative market dynamics - particularly in EM



Source: Coloplast

Our track record in Europe gives us confidence in our global ambition



Source: Coloplast

We are outgrowing the market in all countries in Europe except France



We are investing in and progressing with our new ambition...

1 Shape the standard



Endorsements

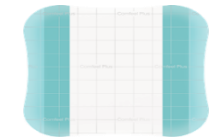


Publications

2 Build a strong product portfolio



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3 Accelerate in EU



Ramp-up



4 Strengthen position in the US



New structure



New management



New investment plan

5 Secure leading position in China



Revised targeting



Leverage position in top 100 cities

6 Selectively invest in EM

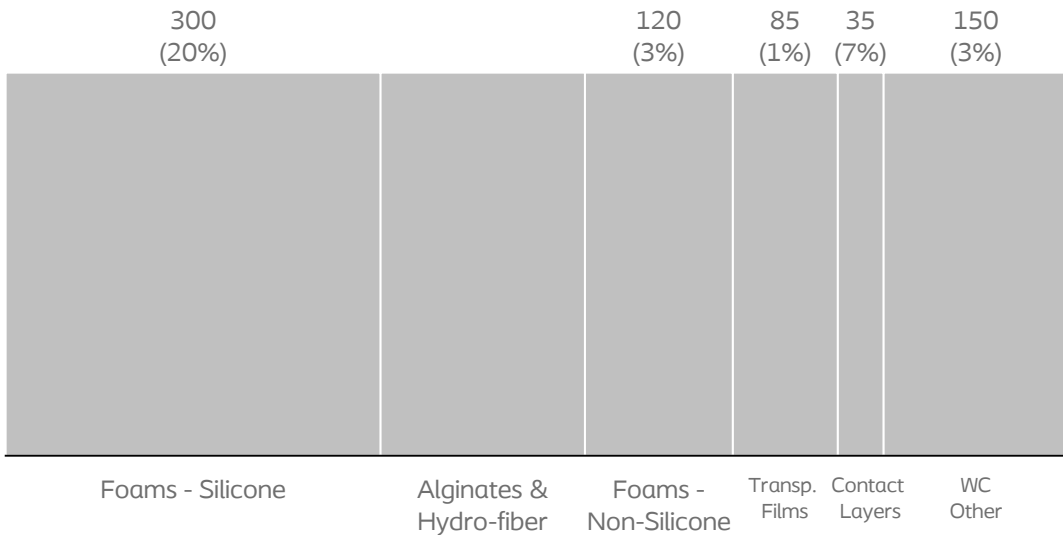


Ramping up in selected markets

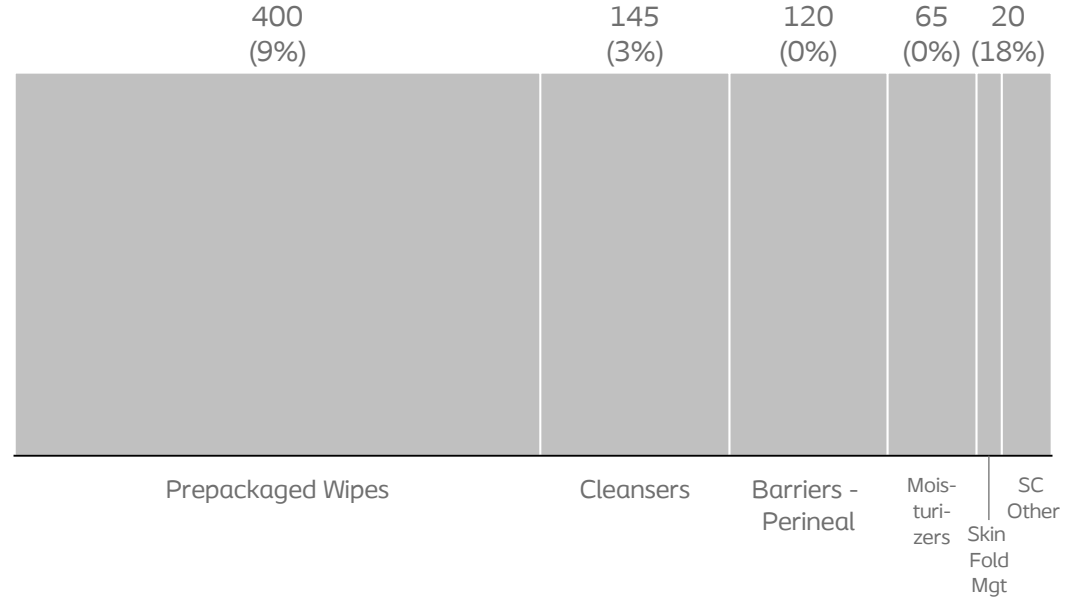
Attractive US value pool in Wound and Skin Care of ~\$1.6bn with strong growth rates

US WSC market 2016/17 estimated value in \$m
(13/14 FY - 16/17 YTD CAGR)

Wound Care Market:
~\$850m, growing at 10% and we have <2% market share



Skin Care Market:
~\$800m, growing at 6% and we have ~8% market share



Source: GHX and Coloplast

We believe we can make a difference in the US

With a new organisation and skilled management team in place we will drive growth through three initiatives ...

Focus on **Acute channel** and win with **IDNs**



Bring strong **product offering** to the US incl. full silicone portfolio and pressure injury prevention products



Increase **Sales & Marketing** pressure



... and we have reason to believe we will succeed

Already present with many key IDNs through **strong SC position**



Global Wound Care **portfolio launched successfully** in other markets



We have **outgrown the market** despite limited portfolio and small investments



Conclusion and summary

Victor

1. We are investing and fully executing on our strategic themes
2. Current financial performance impacted by Emerging Markets as well as price reforms in Greece and France
3. We remain confident in our Wound & Skin Care value creation opportunity and our strategic direction & themes – however more time is required

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