



# Chronic Care update

Coloplast Capital Markets Day 2018

Kristian Villumsen, Executive Vice President, Chronic Care

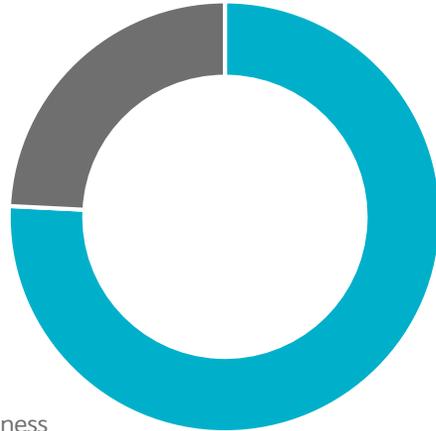
Coloplast Group – Ostomy Care / Continence Care / Wound & Skin Care / Urology Care



# Chronic Care constitutes the lion's share of Coloplast sales and we are strengthening our global position

## Chronic Care sales

DKKm, FY 16/17



>75%

of Coloplast sales

11.8

billion of DKK annual sales

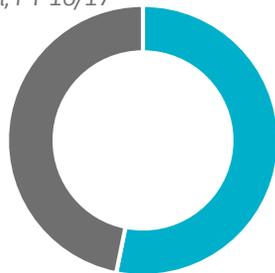
#1

global position

- Chronic Care
- Rest of Coloplast business

## Chronic Care sales by business area

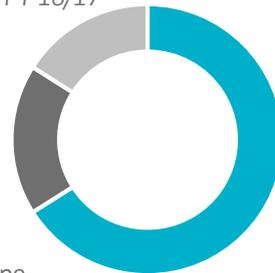
DKKm, FY 16/17



- Ostomy Care
- Contenance Care

## Chronic Care sales by region

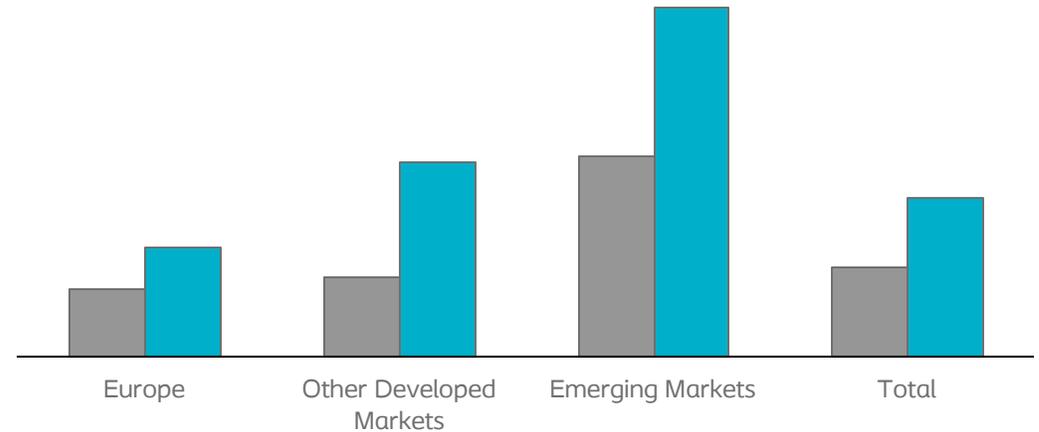
DKKm, FY 16/17



- Europe
- Other Developed
- Emerging Markets

## Chronic Care organic growth vs. market growth by region

FY 16/17



- Coloplast growth
- Market growth

### Supporting market drivers

- + Offering clinically validated products
- + Ageing population
- + Rising international demand for advanced products, and product consumption

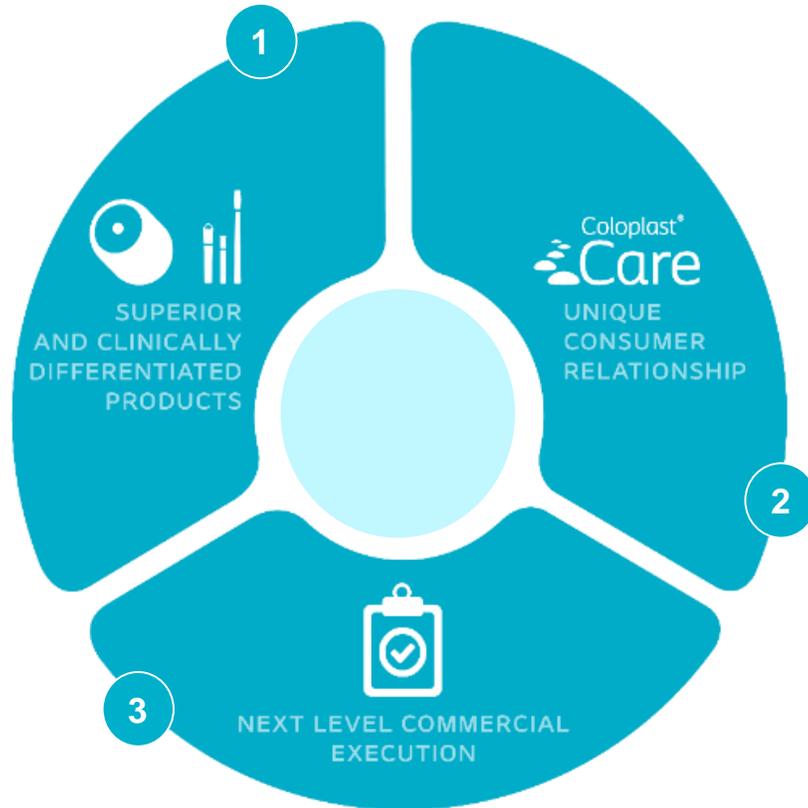
### Constricting market drivers

- Growing cost pressure and demand for value from payers
- Improving detection and cure
- Increasingly consolidated market space

Source: Coloplast

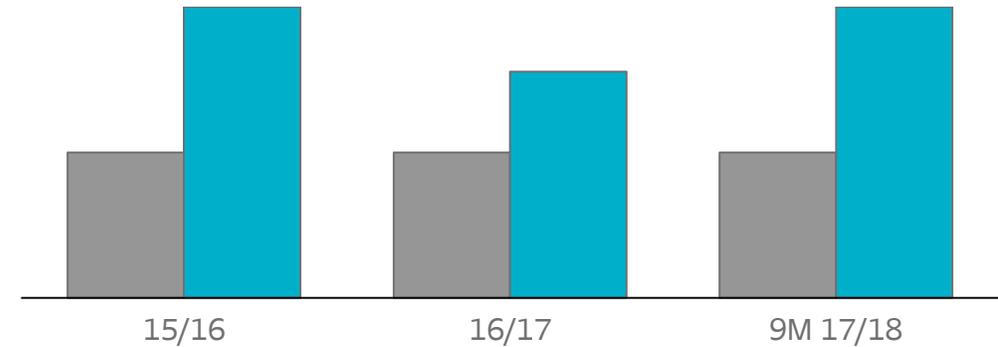
# We consistently outgrow the market guided by our three strategic themes

## Our strategic themes



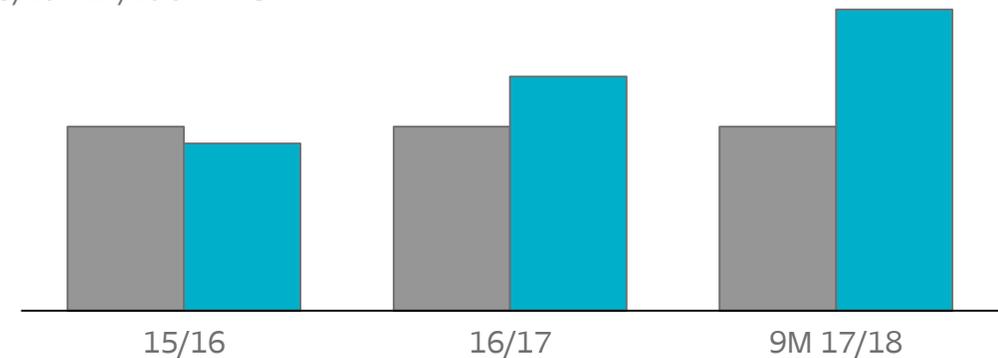
## Ostomy Care organic growth vs. market growth

15/16 - 17/18 9M YTD



## Continence Care organic growth vs. market growth

15/16 - 17/18 9M YTD



Market Coloplast

Source: Coloplast

# With the launch of SenSura Mio® Concave we now have a complete product portfolio across user needs



53% Regular profile

13% Inward profile

34% Outward profile



## SenSura® Mio Flat



New elastic adhesive for better fit

Full-circle filter to protect against ballooning

## SenSura® Mio Convex



Clinically proven leakage reduction

Key growth driver in Bags & Plates product category

## SenSura® Mio Concave

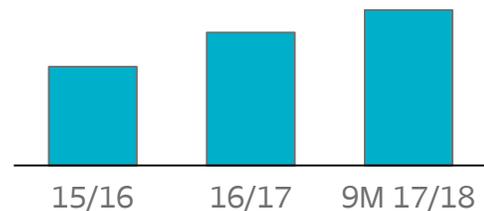


The first ever concave baseplate

Clinically proven superior body fit, quality of life and preference

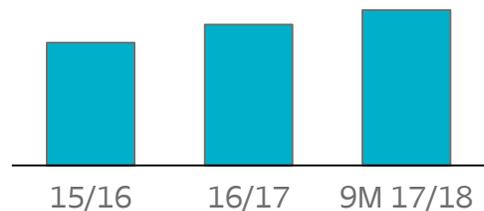
### SenSura® Mio sales

Revenue DKKm, MAT



### Convex product sales

Revenue DKKm, MAT



### Launched in nine countries



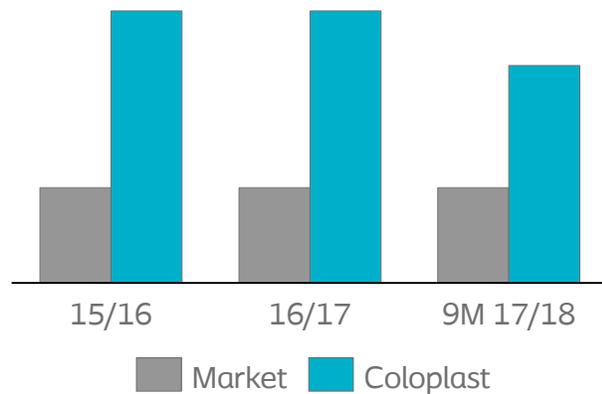
Profile Source: Coloplast Market Research Ostomy Life Study 2016 (VV-0191619)

# We are continuously expanding our Accessories portfolio, strengthening users' customization opportunities



## Our Accessories momentum is outpacing the market ...

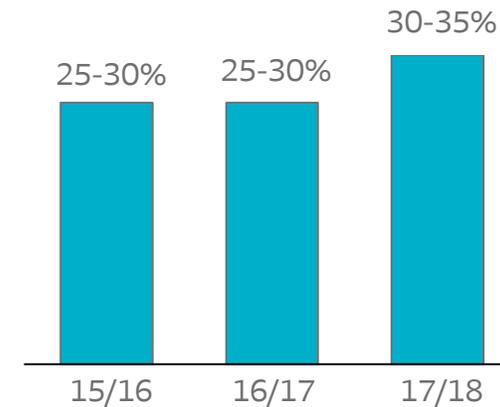
**Accessories growth**  
Revenue growth MAT vs. last year



Source: Coloplast

## ... which translates into market share gains

**Market Share**



Source: Coloplast estimates

# Our broad SpeediCath® family caters to different user needs and addresses distinctive market trends

## SpeediCath® Family



### SpeediCath® Flex



SpeediCath® Flex launched in 16 countries

SpeediCath® Flex Coudé Pro **specifically designed** for the **US market**

### SpeediCath® Compact



Region Europe is the primary driver for the SpeediCath® Compact portfolio

Our products meet requirements for **convenience and discretion**

### SpeediCath® Standard



SpeediCath® Standard is growing in our EM and Other Developed markets

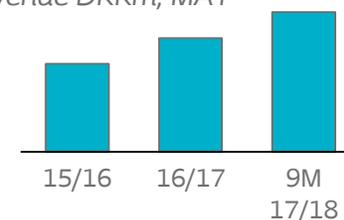
This is largely due to the **upgrade to hydrophilics agenda** in the US

Growth is also supported by improved access to reimbursement in JP, AU, KR

**Compact and Flex products**  
Revenue DKKm, MAT



**Hydrophilics in EM and Other Dev.**  
Revenue DKKm, MAT



# Our Professional platform builds a strong connection with HCPs, providing valuable insights to Coloplast Care

Coloplast Professional is an education and collaboration platform...



...and input from local clinicians advance Coloplast Care

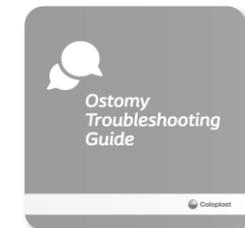


Develop clinical content to local conditions

Cooperate with Coloplast Care advisors to find optimal user solution

Act on insights obtained from Coloplast Care, to improve local support

While our training yields best in class advisors



Strengthen understanding with modules on anatomy, physiology and products

Identify struggling users through specialized investigative framework

Support users through troubleshooting guides

# Our global Coloplast Care and DtC presence enable us to support users across countries and business areas



**Over 1M consumers**  
in our database



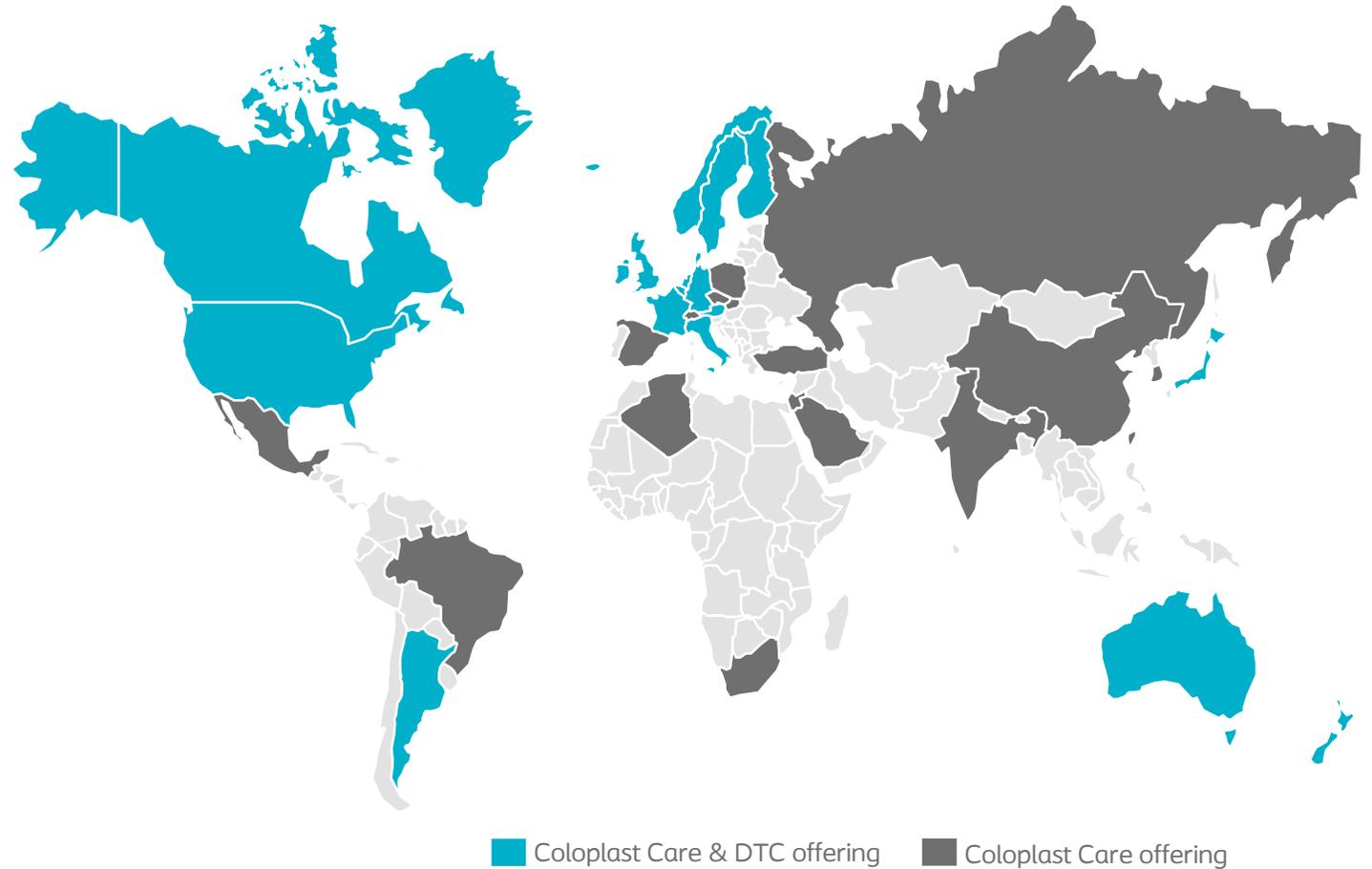
**Over 1M conversations**  
with users across the globe



**Over 30 countries**  
with a consumer setup



**New Bowel Care program**  
implemented in 2018



# We have strengthened our position as a consumer healthcare company and now have direct distribution in our top 5 markets

UK 



USA 



France 



Germany 



China (E-commerce) 



### Our direct Offering

-  Present latest **product innovation**
-  Provide **friction-free product access**
-  Improve **user experience**
-  Widen **access to payers**

# We are poised to sustain our growth agenda by investing in the strategic foundation of our business...

## Innovation



SenSura Mio® range is now a **complete product portfolio** across user needs

SpeediCath® Standard BBT



The launch of SpeediCath® Standard BBT will further our **clinically differentiated agenda**

## Health Care Professionals



Collaborate with HCPs to **strengthen and shape** future user care

Facilitate knowledge exchange through events such as **Ostomy Days** and **Continence Days 2018**

## Direct consumer model



**Expand our consumer support** to additional markets

Continue to refine **Coloplast Care offering** with local clinicians including our **direct service platform**

# ... as well as strengthening our position through investments into regional growth opportunities

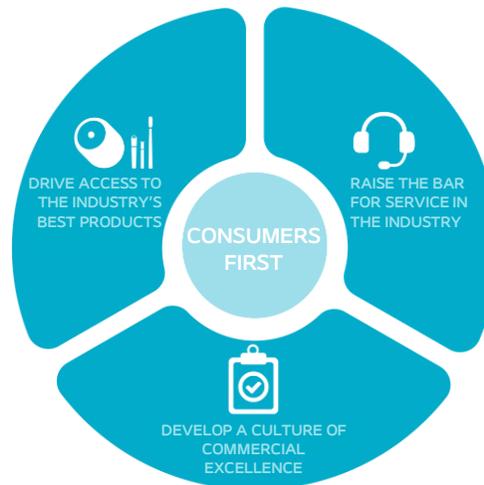
## Region Europe



Region Europe still holds **unaddressed pockets of growth**

We are currently investing in the **UK, DE, FR and PT**

## US



Investments into US are **yielding +10% growth**

Our **new strategy** will strengthen our value proposition to all stakeholders

## Emerging Markets

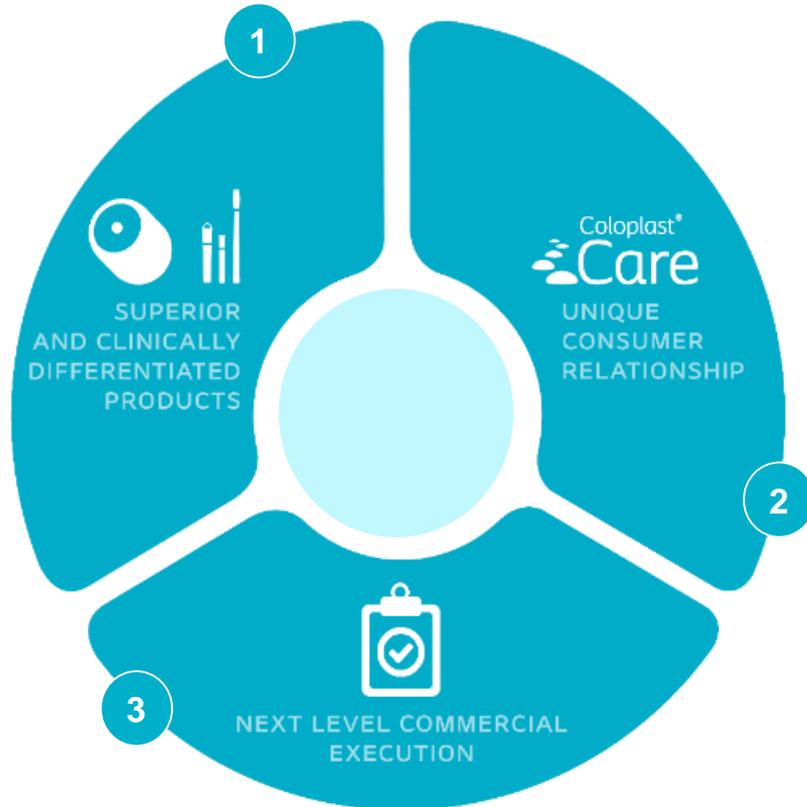


Investments into Emerging Markets are **yielding returns and high growth rates**

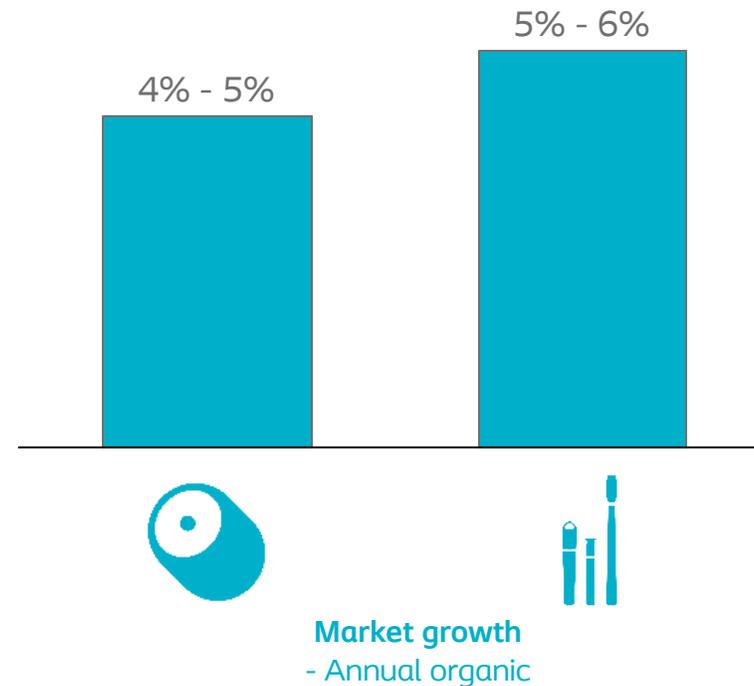
We will **continue to invest** in attractive market opportunities

# Our ambition remains to outgrow the market, which we will achieve through our strategic themes

## Our strategic themes



## Our revenue ambition is to outgrow the market



## 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