Introduction to Region Europe Chronic Care

Coloplast Capital Markets Day 2018
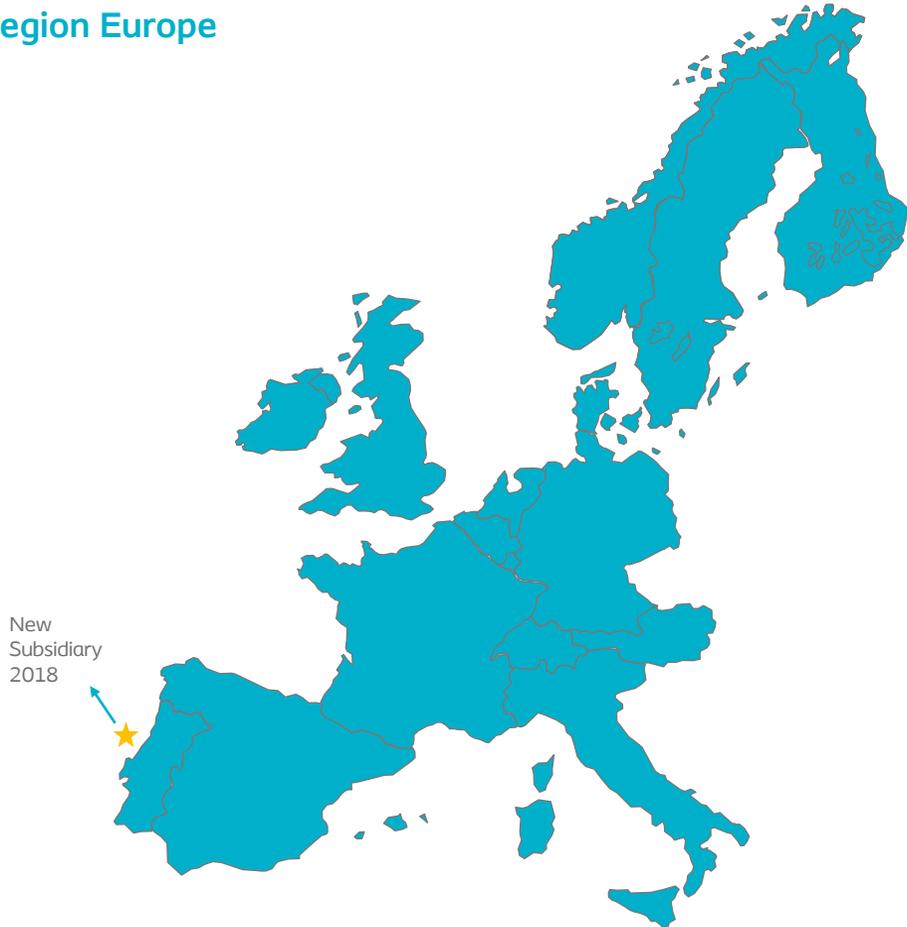**Kristian Villumsen, Executive Vice President, Chronic Care**

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

Coloplast

Region Europe Chronic Care is a key contributor to growth and generates incremental cash flow to fuel growth globally

Region Europe

New Subsidiary 2018

Region Europe at a glance

- Subsidiaries in 14 countries

- Services 10,000+ hospitals

- 1,250+ employees

- Undisputed market leader with 40-50% market share

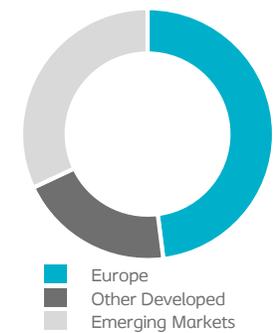- >95% of products are fully reimbursed

Chronic Care revenue by BA in Europe
FY 16/17

- Ostomy Care
- Continence Care

Chronic Care Revenue by region
FY 16/17

- Europe
- Other Developed
- Emerging Markets

Organic growth contribution by region
FY 16/17

- Europe
- Other Developed
- Emerging Markets

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The market in Region Europe is DKK ~16bn with stable growth around 3-4%

Ostomy Care

Market size and growth
DKKbn

~3%

OC

Continence Care

Market size and growth
DKKbn

4-5%

CC
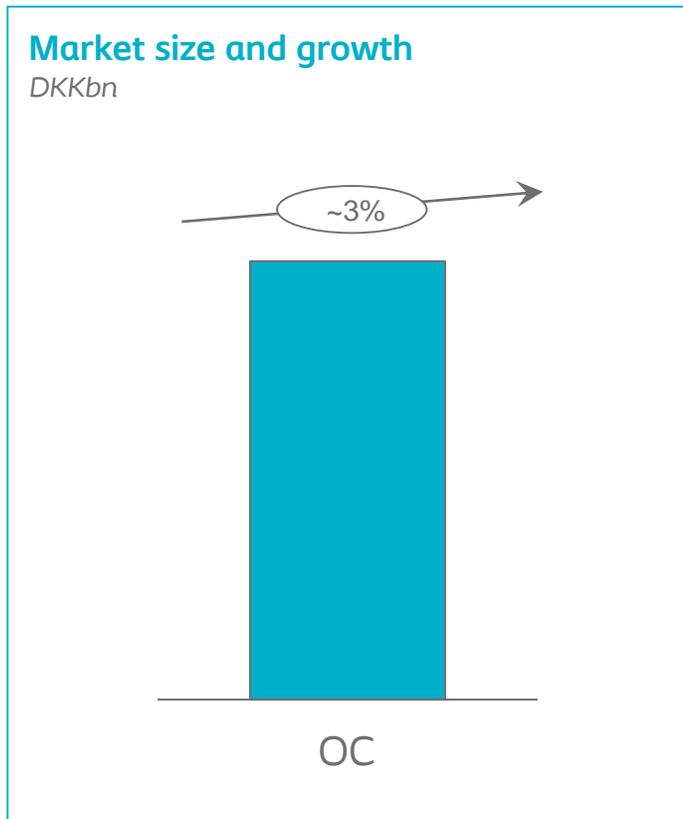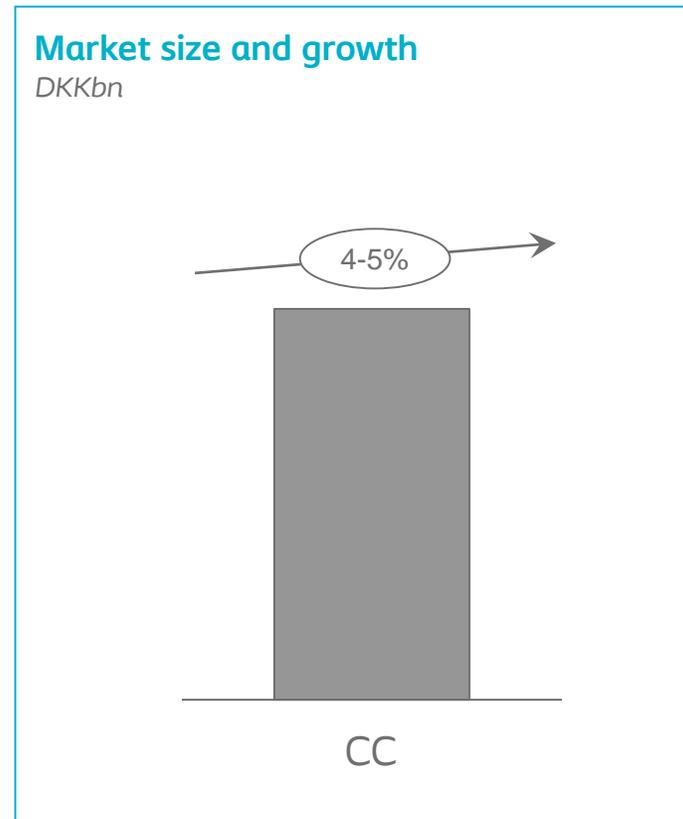
Key Market Trends

- Attractive markets with **stable and moderate growth**

- **Good access** to innovative and clinically differentiated products

- Reimbursement reforms leading to **pressure on price**

- **Consolidation in the distribution channel** and forward integration by manufacturers

Source: Coloplast estimates

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We continue to see attractive growth opportunities which we address through our three strategic themes

Superior and clinically differentiated products

Unique consumer relationships

Coloplast Care

Charter
Care Delivered

SIEWA
Coloplast Homecare

Lilial

Next level commercial execution

Strong leadership

Sales force effectiveness

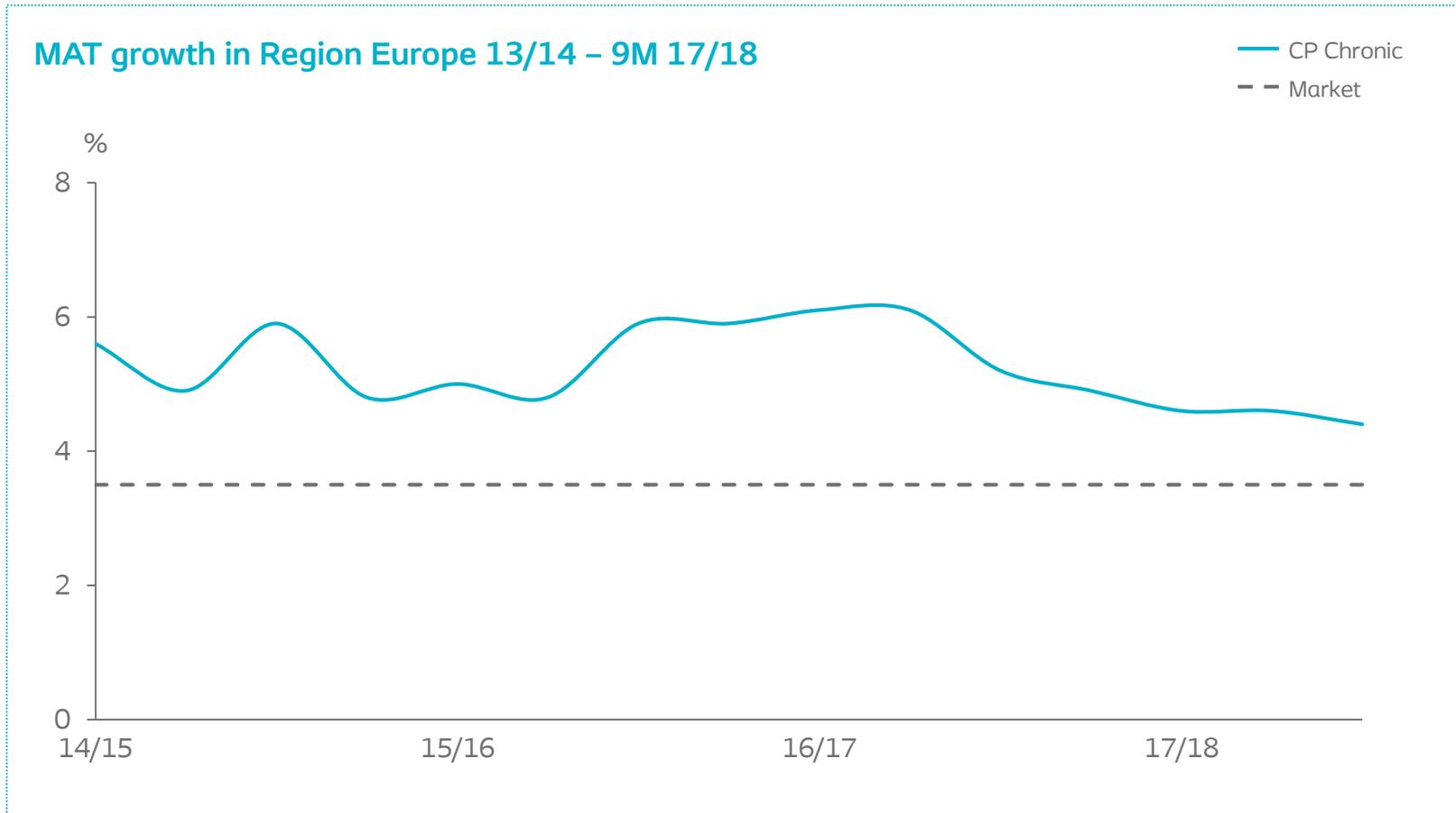Payer management

Commercial Investments

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We have consistently outgrown the market and continue to invest in key growth opportunities

MAT growth in Region Europe 13/14 – 9M 17/18

--- CP Chronic
- - - Market

%

8

6

4

2

0

14/15   15/16   16/17   17/18

Key investment areas

Coloplast

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

Coloplast