



Chronic Care United Kingdom update

Coloplast Capital Markets Day 2018

Annemarie van Neck, Vice President, Country Manager UK & Ireland

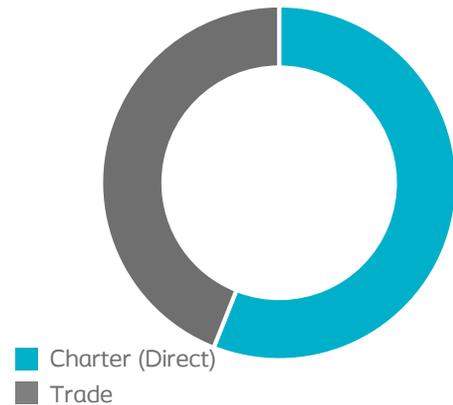
Coloplast Group – Ostomy Care / Continence Care / Wound & Skin Care / Urology Care



The UK is Coloplast's largest subsidiary, operating a direct model in a growing yet challenged market

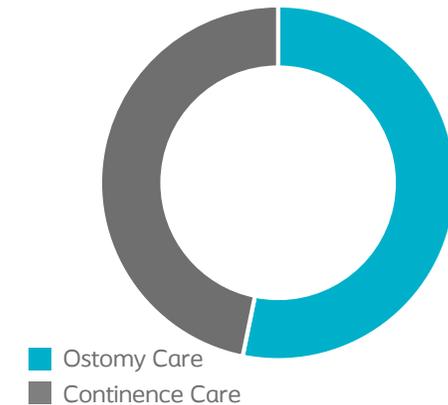
UK by Channel

Revenue DKKm, FY 16/17



UK by Business Area

Revenue DKKm, FY 16/17



>10%

of Coloplast group revenue

2.4

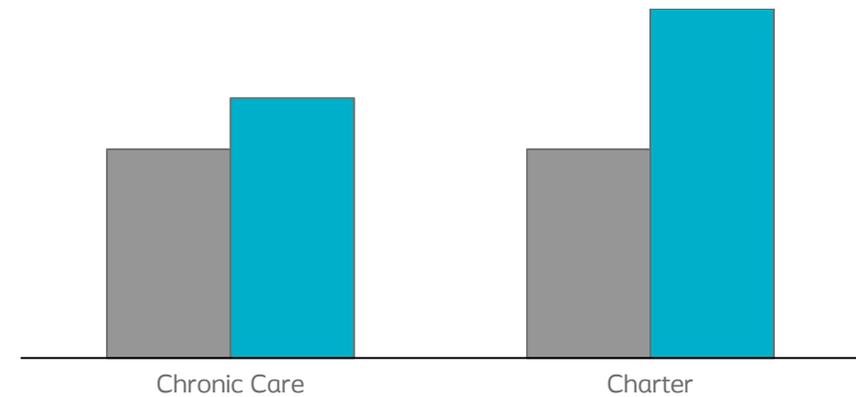
billion of DKK annual revenue

#1

In Product and Channel

UK Chronic Care organic revenue growth vs. market growth

FY 16/17



Coloplast growth
Market growth

Market Developments

- NHS cost and resource pressures
- # of stoma surgeries decreasing

Coloplast Developments

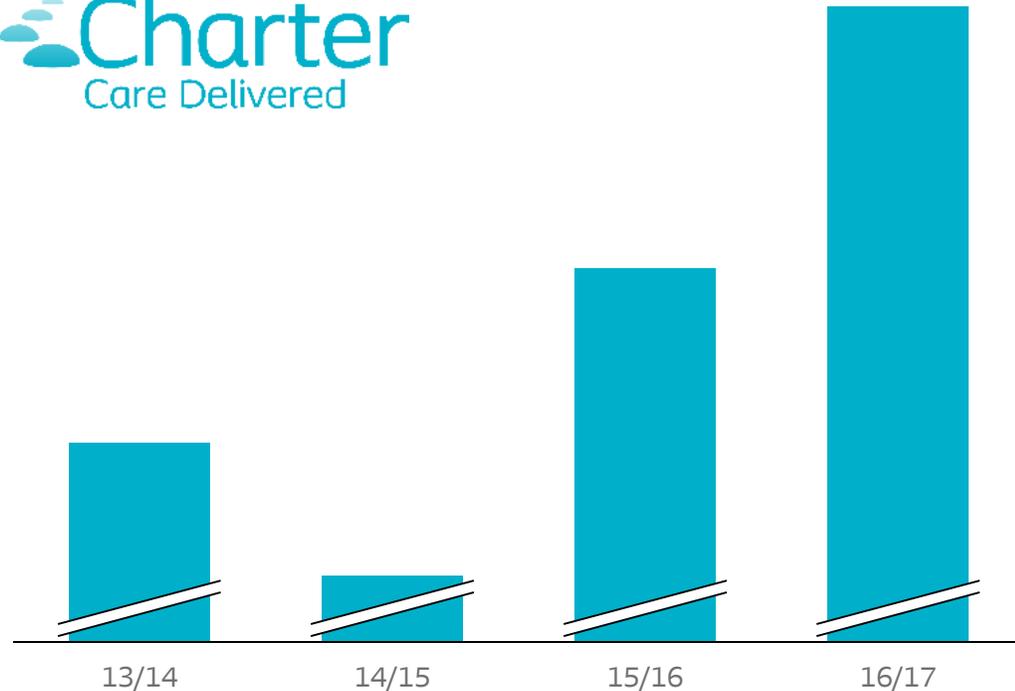
- Increased acquisition outside of hospital setting
- Focus on consumer retention on product and service
- Collaboration with NHS to manage OC and CC population

Source: Coloplast

Source: Coloplast estimates & IMS data

Charter is performing well and offers services well beyond basic home delivery

Charter revenues in GBPm



Charter is now leading the industry in order-to-delivery time...



Order taking



Prescription Collection



Home Delivery

... and has been steadily broadening its services



Digital Services



Welcome Calls



Vulnerable patients programme

Source: Coloplast

The UK has set out an ambitious plan to accelerate growth over the coming years



Superior and clinically differentiated products

- Offering the broadest product portfolio on the market
- Key additions to the portfolio (SenSura Mio Convex and Concave, SenSura Mio Hospital Assortment, and Speedicath Flex) have solidified market leadership across Chronic Care
- Brava accessories portfolio important growth driver both in acute and community

Unique consumer relationships

- Integrated services offering of Home Delivery and Coloplast Care
- High-touch service offering consisting of telephony, on-line and nursing support
- Deep understanding of consumer behavior through Charter insights
- Enhanced collaboration with local NHS payers to support population management

Next level commercial execution

- Increased investment in staff, marketing support and IT to ensure process excellence
- External sales force enabled to sell complete Coloplast solution, including product and extensive service offering
- Strong cross-functional collaboration to deliver on population management promise

UK has successfully launched key innovations, accelerating growth across Chronic Care

SenSura® Mio Convex & Concave



The completed SenSura® Mio Portfolio has become the market leading platform for new patients discharged

SenSura® Mio Concave is addressing an unmet need in a country with an increasing obesity problem

Brava® accessories



Brava® accessories is a key contributor to UK growth and Coloplast is now the market leader in accessories in the UK

Increased launch cadence (2x per year) allows continued dialogue with existing and prospective consumers

SpeediCath® Flex



The successful introduction of SpeediCath® Flex has resulted in strong outperformance vs. the market

We have redefined the UK Direct distribution model for the benefit of consumers, HCPs and NHS

We are integrating Distribution and Coloplast Care into one Direct model...

Integrated Coloplast Services for consumers, healthcare professionals and the NHS

Unrivalled product portfolio



Services beyond expectation



Deep insights & control

...so that key stakeholders will experience a significant positive impact in their interactions with Charter



Identifying and Solving Issues for ordering Consumers



Being close to HCPs and making them feel valued



Being a "Responsible partner for the NHS" and making it core to our operations

We are increasing our reach into the community by partnering up closely with local payers

Population
Insight

Building insights into regional Chronic Care populations

Cost Control

Optimizing routines and usage

Quality of
Care

Reviewing patients and improving QoL



Sustainable programs of Coloplast Care, through hands-on nursing, on-line and telephony services

We are upscaling our organisation and creating a cross-functional culture of exceeding customer expectations

Exceeding customer expectations will be core to all operations, both customer facing and in support



Increasing **Training & Quality** capability, both in people and in systems

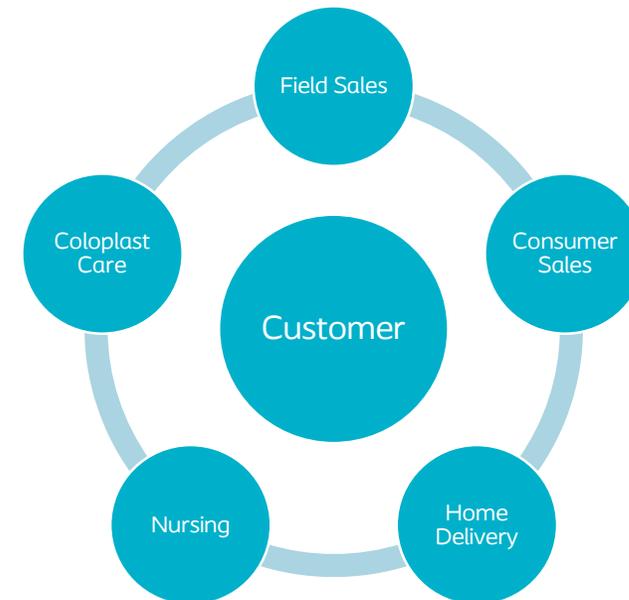


Ensuring **process excellence** and continuous process improvement



Develop career focused **customer service experts** in specialized teams

Cross-functional collaboration is key to deliver on our commitments to our customers



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