



UK Adult Incontinence Market

forma-care™



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forma-care™ and the UK Market



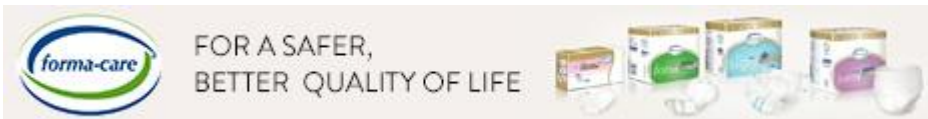
1. Market Size and Trends
2. Channel - NHS vs Retail vs E-Commerce
3. Competitors
4. form-care™ Competitive Advantage
5. forma-care™ Product Range
6. forma-care™ Marketing
7. Conclusions



1. Market Size and Trends



- Global Market Size ca. . USD \$ 7.5 Billion (Source : Euromonitor 2016 All Inco products)
- 2010: 12.9 Bio, 2015 : 18.5 Bio, 2020 : 25.8 Bio (projected)
- Global CAGR ca. 7%
- UK Market ca. £300 Mio in 2015
- Projection by 2025 - £ 590 Mio
- Approximately 3.5 Mio sufferers in the UK
- Spend per “diagnosed” patient £300-£400 per annum
- Demographics – Ageing population, especially Western Europe
- Demographics – 75%-80% Women and 75% over 60 years old





2. Sales Channel

- **NHS Free Supply - 65% (declining)**
 - ✓ Contenance clinic diagnosis
 - ✓ Care Home Patients

- **High Street Retail – 28% (growing)**
 - ✓ Boots, Superdrug, Independent Pharmacy
 - ✓ Mobility Outlets
 - ✓ Supermarkets, the largest 2016 £16 Mio
 - ✓ Discounters

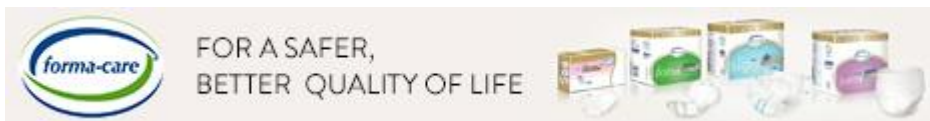
- **E-Commerce – (7% growing)**
 - ✓ Healthcare Distributors
 - ✓ Incontinence Specific Web Sites
 - ✓ General E-Commerce – e.g. Amazon
 - ✓ Brands – Direct Sales (not forma-care™)



3. Competitors



1. TENA
2. Hartmann - Molicare
3. ABENA
4. ONTEX – idExpert, Lille
5. ATTENDS
6. forma-care™
7. DEPENDS
8. AMD



4. Forma-care – Competitive Advantage



- Established since 1989 in DACH
- Wide and varied Product Range
- German Quality Standards
- Coherent Distribution Strategy in the UK
- Aggressive Pricing to aid Market Penetration
- Limited Competition in UK Market – New Blood



5. forma-care™ – Product Range



1. Comfort – PE Backed

- ✓ Small and Large Shaped Pads
- ✓ All-in-Ones

2. Sensitive – TBS Backed Non-Breathable

- ✓ Large Shaped Pads
- ✓ All-in-Ones

3. Premium Dry TBS Backed Breathable

- ✓ Small and Large Shaped Pads
- ✓ All-In-Ones
- ✓ Pull Up Pants



6. forma-care™ – Marketing



- Switch List available for all Brands
- Sampling available
- www.forma-care.co.uk - listings
- NHS Tendering Programme – Distributor Support
- PROMOCON – www.promocon.co.uk 35% NHS CC's
- Bladder & Bowel Foundation



7. Conclusion



- UK and Global Market is growing exponentially
- Dominated by a few, complacent large companies
- forma-care™ new to the UK Market, no baggage
- Aggressively Marketing our established European Brand
- Only targeting a limited number of Partners in the UK
- Best Price:Performance in the UK Market
- We are working with Partners not against them





Thank you for your Attention!



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