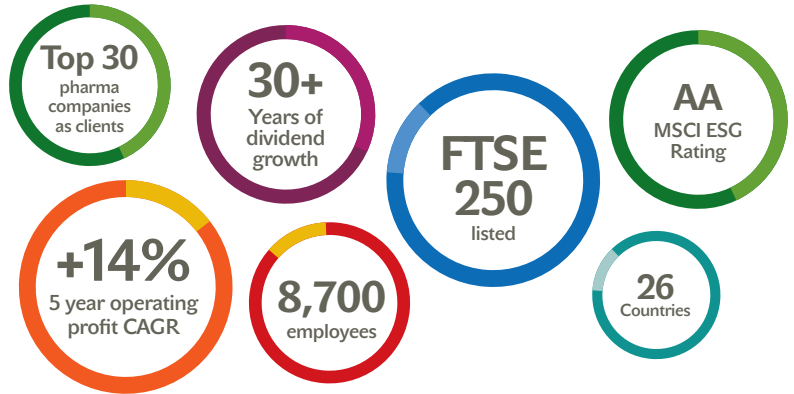




UDG Healthcare is a global leader in the healthcare advisory, communications, commercial, clinical and packaging services industry.

UDG Healthcare enables and supports large pharmaceutical to small biotech companies to bring their products to market, ensuring patients can access these drugs and providing support to educate healthcare professionals and patients on these products. The company provides outsourced services to over 300 healthcare companies at all stages of the drug life cycle, including sales reps, nurse-led training, healthcare communications and packaging.

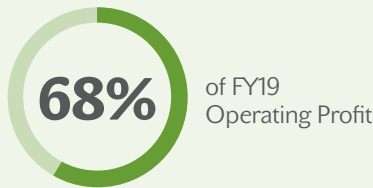


Our divisions

Ashfield



A global leader in healthcare advisory, communications, commercial and clinical services



Advisory

Healthcare brand advisory, strategic consulting, product commercialisation strategy, market access, analytics and commercial audit services.

Communications

Scientific and creative communications, digital and patient-centred content for medical affairs and brand commercialisation with areas of specialty including behavioural science, rare disease, PR and on-demand advertising services.

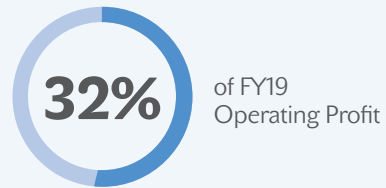
Commercial and Clinical

Commercialisation and clinical services including sales representatives, patient support and adherence services, contact centres, medical affairs and meetings and events.

Sharp



A global leader in contract clinical, manufacturing, packaging and technology services



Clinical

A comprehensive and integrated clinical trial supply and management service, from pre-clinical through to commercialisation.

Manufacturing

Clinical manufacturing services including analytical services, formulation development, over-encapsulation and placebo manufacture.

Packaging

Commercial packaging solutions in multiple formats including bottles, blisters, specialty and secondary packaging of injectables.

Technology

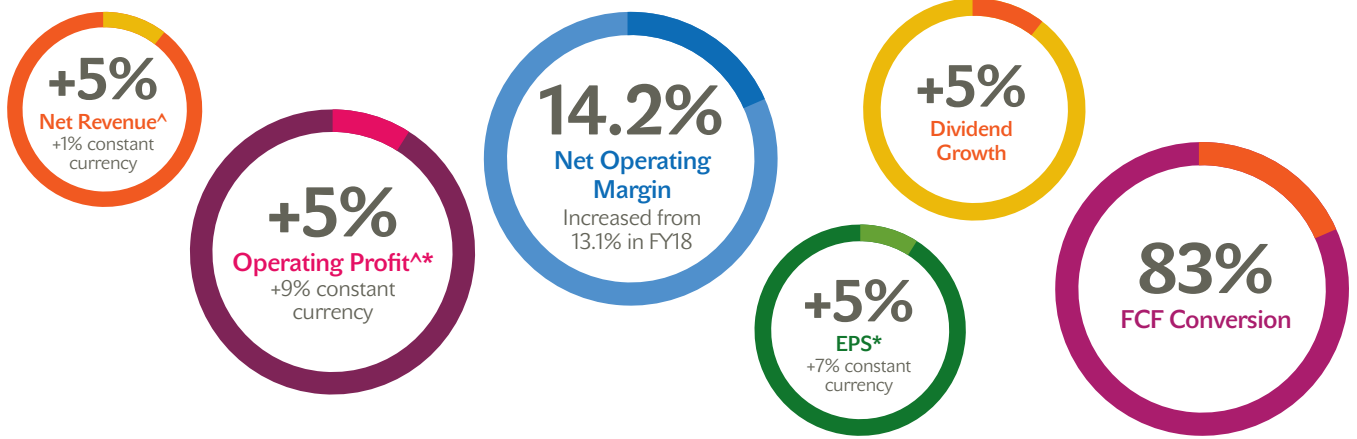
Technology services to support both commercial and clinical packaging including design, serialisation solutions and clinical IRT.

Acquisitions completed since the United Drug disposal in April 2016

Proceeds from disposal of United drug Supply Chain businesses reinvested in high-growth businesses, to expand the range of capabilities UDG Healthcare offers its global pharmaceutical client base

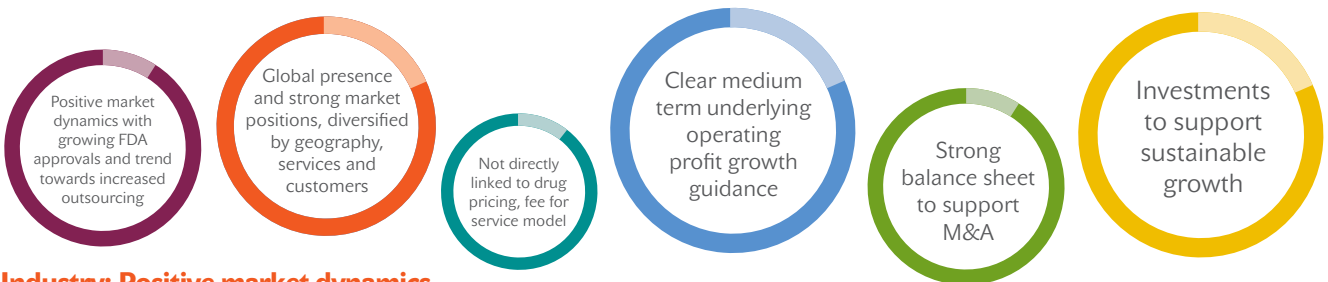


FY19 highlights

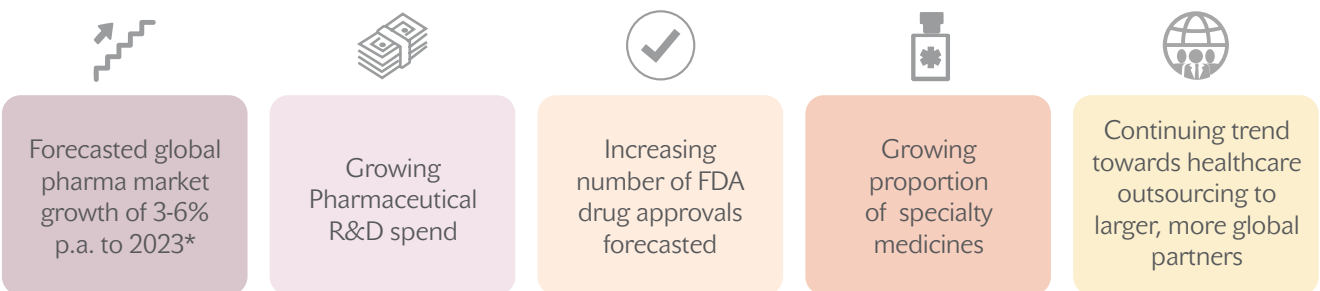


[^] Underlying growth. Throughout this presentation, references to underlying growth are financial metrics adjusted for the impact of currency translation movements and any acquisition or disposal activity.
^{*} Operating profit, profit before tax and EPS are before the amortisation of acquired intangible assets, transaction costs and exceptional items.

Investment proposition



Industry: Positive market dynamics



*The Global Use of Medicine in 2019 and Outlook to 2023. Forecasts and Areas to Watch, IQVIA Institute, January 2019.

Did you know?

- Of the Top 10 largest drug launches in the US in 2018, UDG Healthcare has worked with clients on 5 of them.
- Ashfield Commercial and Clinical delivers services in 21 countries and has market leading positions in 12 EU countries. We have over 5,000 pharmaceutical sales representatives, hospital specialists, key account managers, e-representatives, clinical educators and medical science liaisons working across the globe.
- Ashfield Communications completed 5,300+ medical writing projects during the year across 130+ therapeutic areas.
- Sharp US has serialised >2bn units to date.
- Sharp's US packaging footprint has nearly doubled since acquisition and the total divisional footprint is >1.2 million square feet.

Highly experienced board and management team



Peter Gray
Non-Executive Chairman
Appointed February 2012
Previously Vice Chairman & CEO of ICON plc

Brendan McAtamney
Chief Executive Officer
Appointed CEO February 2016
Joined as COO September 2013
Previously held senior positions in Abbott

Nigel Clerkin
Chief Financial Officer
Appointed CFO May 2018
Previously CFO of ConvaTec Group & Elan Group

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