Full Year Results Presentation FY2023

For the year ended 31 March 2023

Fisher & Paykel HEALTHCARE

Important notice

Disclaimer

The information in this presentation is for general purposes only and should be read in conjunction with Fisher & Paykel Healthcare Corporation Limited's (FPH) Annual Report 2023 and accompanying market releases. Nothing in this presentation should be construed as an invitation for subscription, purchase or recommendation of securities in FPH.

This presentation includes forward-looking statements about the financial condition, operations and performance of FPH and its subsidiaries. These statements are based on current expectations and assumptions regarding FPH's business and performance, the economy and other circumstances. As with any projection or forecast, the forward-looking statements in this presentation are inherently uncertain and susceptible to changes in circumstances. FPH's actual results may differ materially from those expressed or implied by those forward-looking statements.

Constant currency information included within this presentation is non-GAAP financial information, as defined by the NZ Financial Markets Authority, and has been provided to assist users of financial information to better understand and track the company's comparative financial performance without the impacts of spot foreign currency fluctuations and hedging results and has been prepared on a consistent basis each year. A reconciliation between reported results and constant currency results is available in the company's Annual Report 2023. The company's constant currency framework can be found on the company's website at www.fphcare.com/ccf.

Full year business highlights

the lives of ~20 million patients around the world

our online Education Hub for clinicians in the United States

Overseas Investment Office approval for the purchase of land in Karaka for our second New Zealand campus

regulatory clearance in the United States for Airvo™ 3

development of our new manufacturing facility in China

expansion of our Anesthesia sales team to grow awareness of the benefit to patients

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Key second half financial results

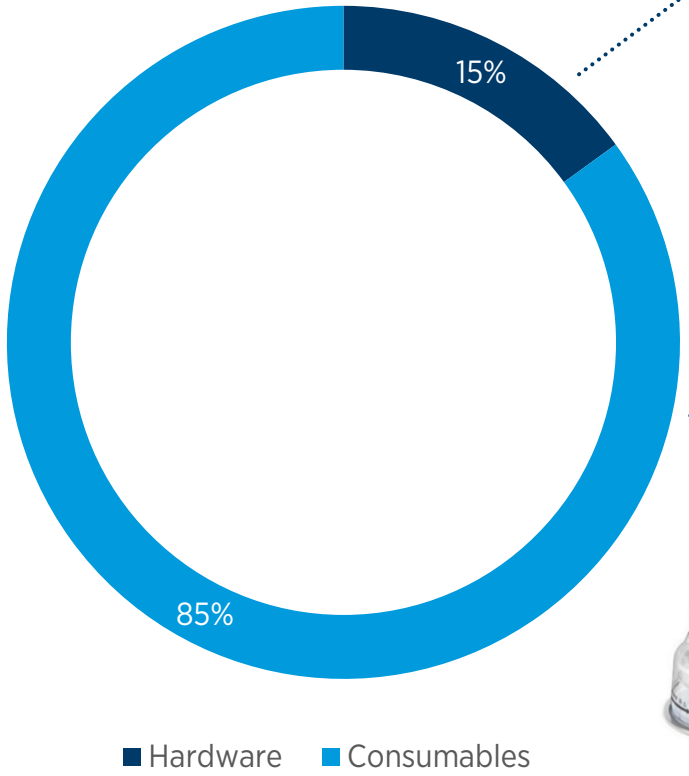
H2 FY23 (6 months to 31 March 2023)

	% of Revenue	NZ$M	△PCP^	△CC*
Operating revenue	**100%**	**890.5**	**14%**	**12%**
Hospital operating revenue	66%	584.8	9%	7%
Homecare operating revenue	34%	303.9	25%	22%
Hospital new applications consumables revenue			14%	13%
OSA masks revenue			28%	24%
Gross margin / Gross profit	59%	525.2	-307bps	-220bps
SG&A	26%	229.6	13%	8%
R&D	10%	90.1	15%	15%
Total operating expenses	36%	319.7	13%	10%
Operating profit	**23%**	**205.5**	**1%**	**4%**
Profit after tax	**17%**	**154.4**	**0%**	**-3%**

^ PCP = prior comparable period * CC = constant currency

Hospital product group

FY23 HOSPITAL REVENUE COMPOSITION



FY22 Hospital revenue composition
Hardware: 27% Consumables: 73%

HARDWARE

F&P 950 System

F&P 850 System

F&P Airvo 3

F&P Airvo 2

F&P HumiGard

CONSUMABLES

Invasive ventilation

Noninvasive ventilation

Optiflow™ nasal high flow

Optiflow™ anesthesia

Surgical

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Hospital product group

H2 FY23
HOSPITAL OPERATING REVENUE
$584.8M

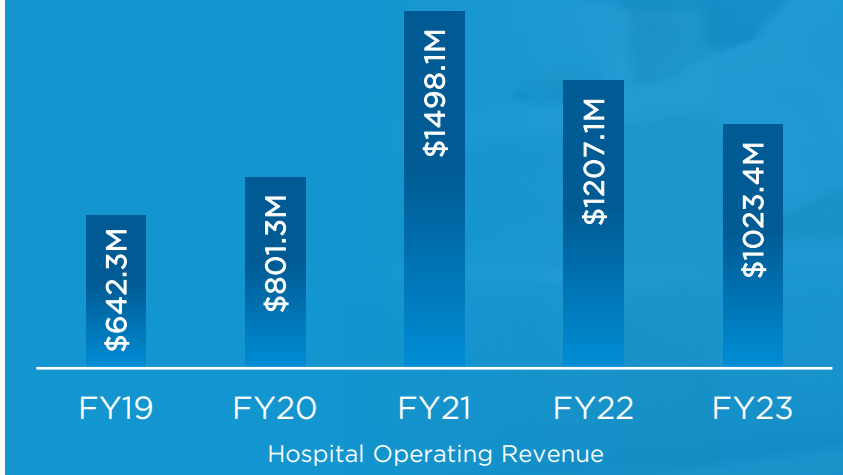
NZ$ ↑ 9%

CONSTANT CURRENCY ↑ 7%

NEW APPLICATIONS CONSUMABLES REVENUE *

NZ$ ↑ 14%

CONSTANT CURRENCY ↑ 13%



- Hospital consumables moving to more stable ordering patterns
- New applications consumables* made up 72% of H2 FY23 Hospital consumables revenue, 71% in H2 FY22
- FY23 Hospital hardware revenue remained above pre-COVID levels, -53% on FY22 in constant currency

*New applications = Noninvasive ventilation (NIV), nasal high flow, surgical

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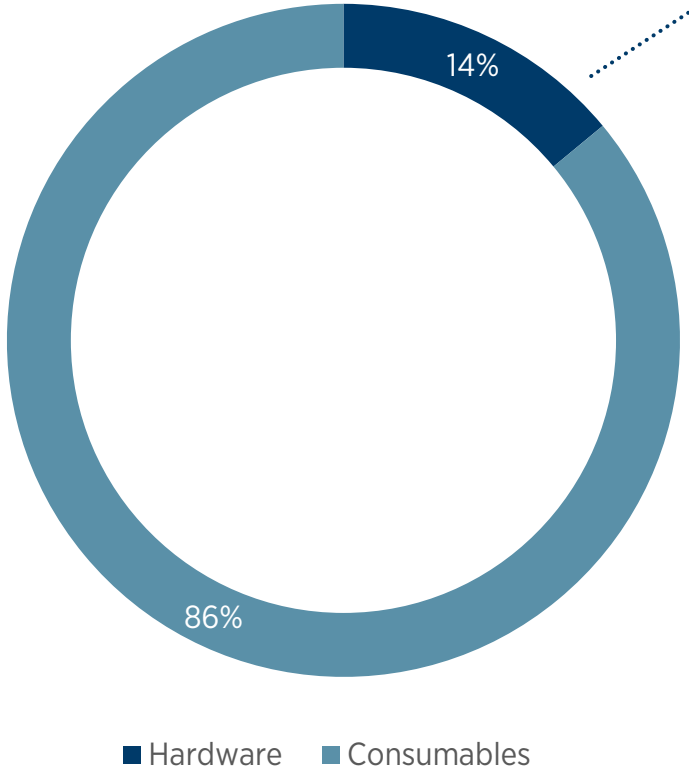
Homecare product group

FY23 HOMECARE REVENUE COMPOSITION



FY22 Homecare revenue composition
Hardware: 16% Consumables: 84%

HARDWARE

F&P SleepStyle

F&P myAIRVO 2

F&P 810 System

CONSUMABLES

CPAP Therapy/OSA

F&P Evora Full

F&P Evora Nasal

F&P Brevida

Home Respiratory Support

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Homecare product group

H2 FY23
HOMECARE OPERATING REVENUE

$303.9M

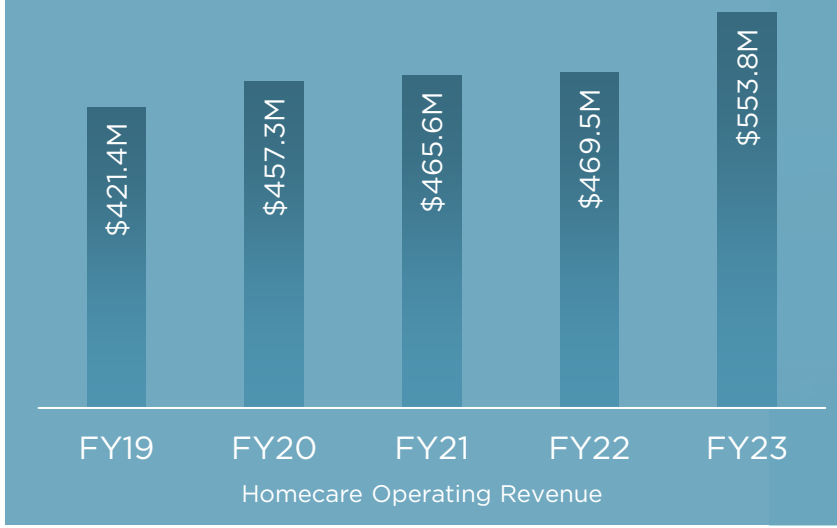
NZ$ ↑ 25%

CONSTANT CURRENCY ↑ 22%

MASK REVENUE

NZ$ ↑ 28%

CONSTANT CURRENCY ↑ 24%



- Almost full year of F&P Evora Full has contributed significantly to the strong OSA mask revenue
- OSA flow generator revenue grew 22% in 2H FY23 as raw material interruptions eased

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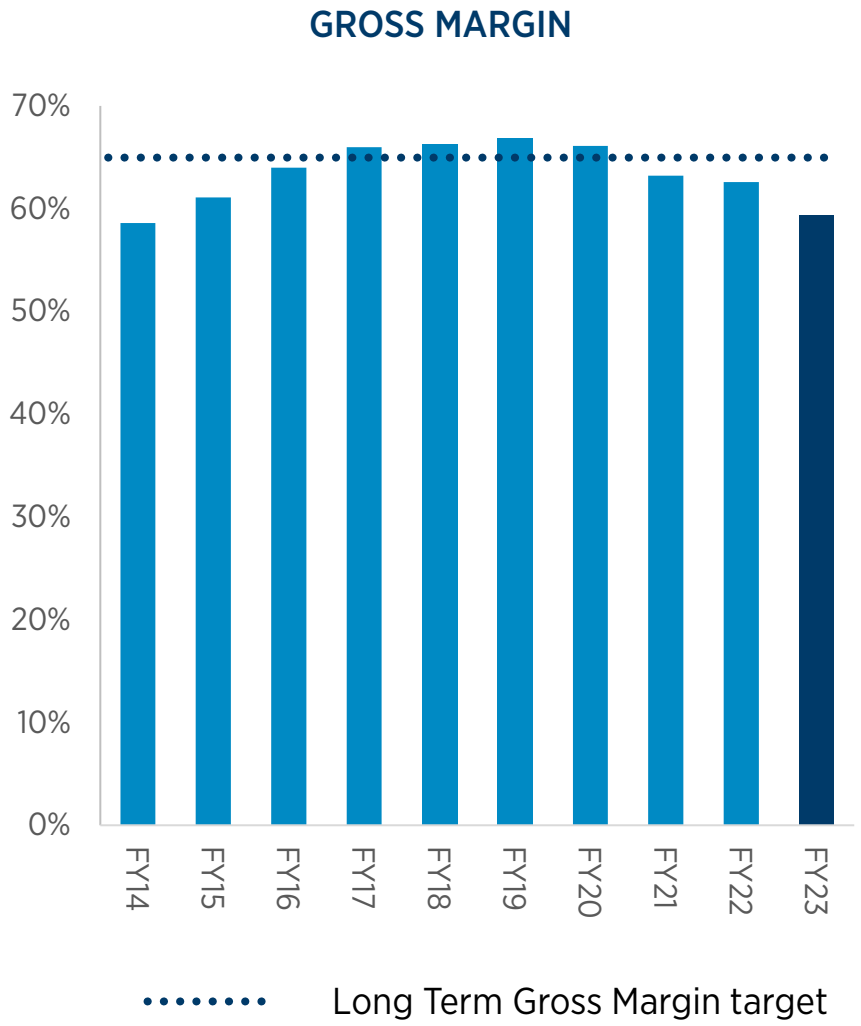
Gross Margin



- Gross margin for the full year:
  - decreased by 325 bps to 59.4%
  - decreased by 369 bps in constant currency
- Continued elevated freight costs impacted constant currency gross margin by approximately 230 basis points compared to pre-COVID-19 rates for the full year, a similar impact to the prior year.
- Manufacturing inefficiencies increased this year as we balance demand fluctuations with manufacturing throughput.
- FY23 second half gross margin improved on FY23 first half by 179 bps in constant currency.

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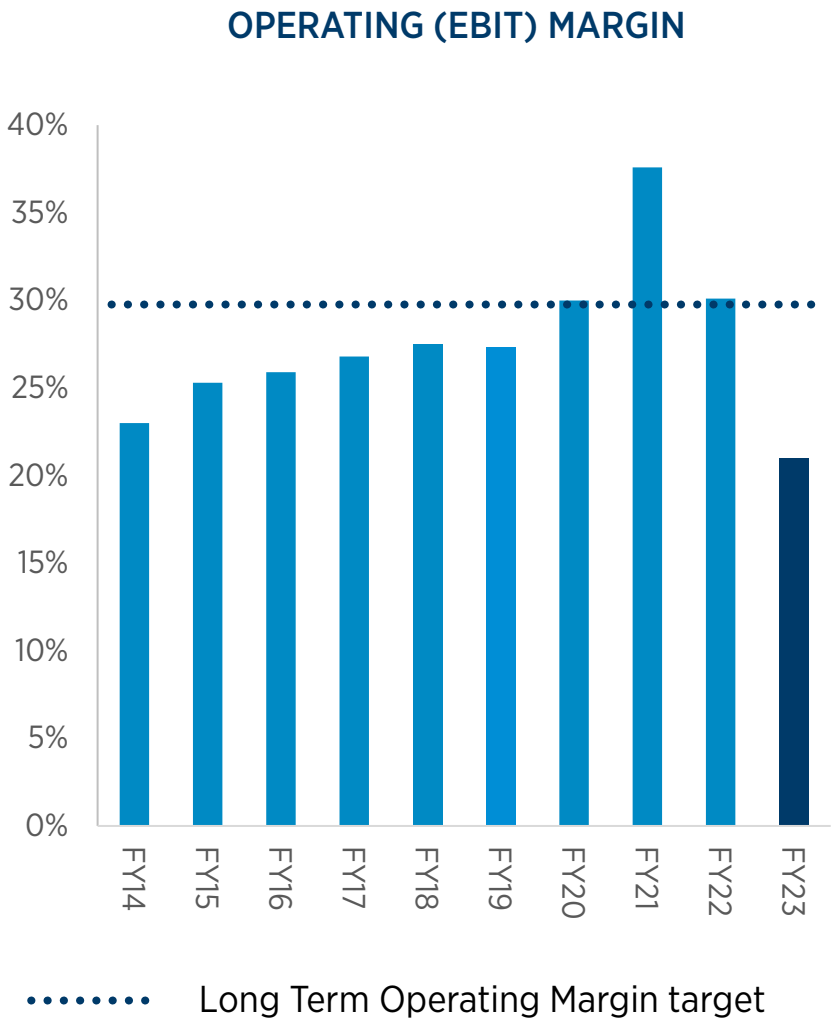
Operating Margin



Operating expenses

- $606.2M, +11% (+7% CC)
- Operating margin decreased by 905bps (-944bps CC) to 21% with continued investment in operating expenses to support COVID-19 driven hardware sales and accelerate future product pipeline

Research & Development expenses

- $174.3M, +13% (+13% CC)
- Reflecting underlying growth and timing of R&D projects
- Estimate ~60% of R&D spend eligible for tax credit

Selling, General & Administrative expenses

- $431.9M, +10% (4% CC)

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Cash Flow and Balance Sheet

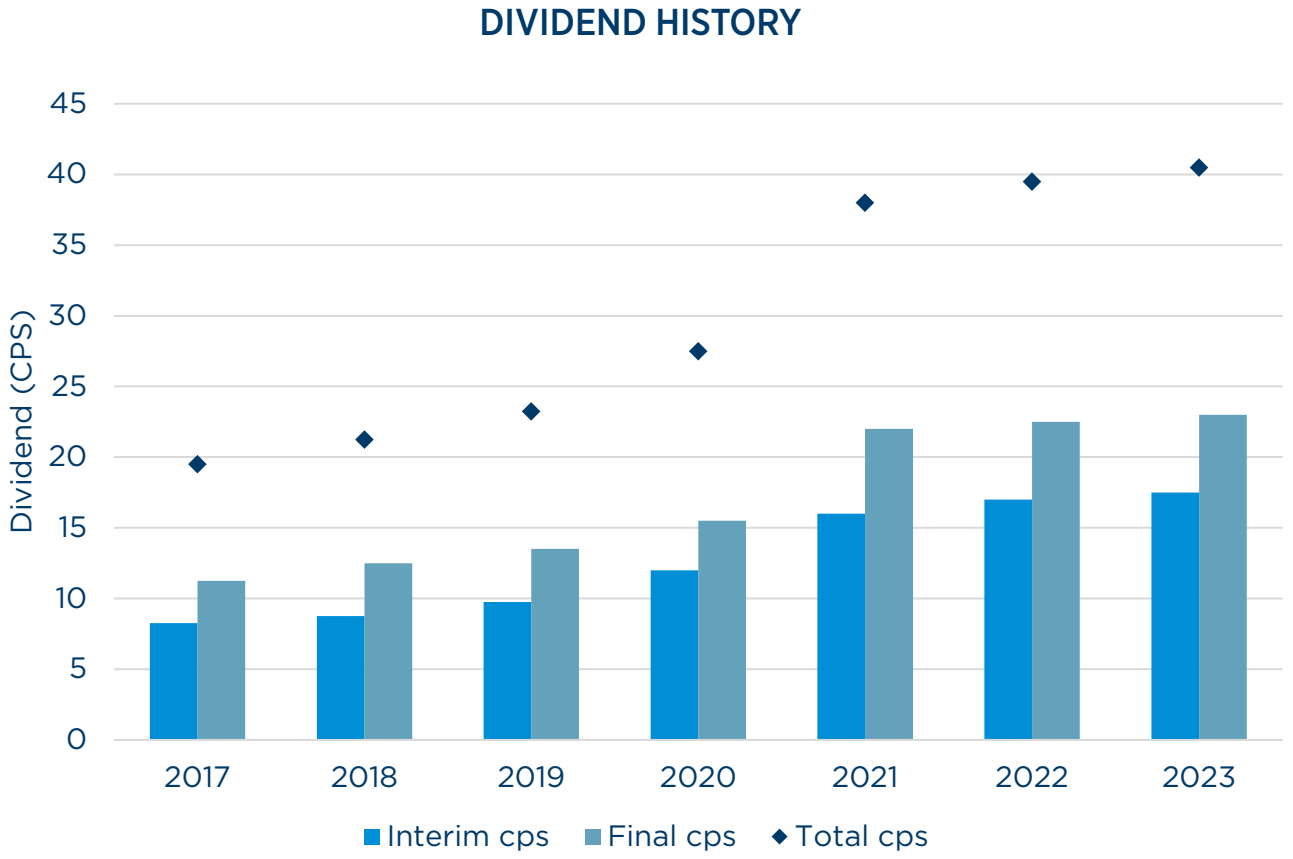
	FY22 NZ$M	FY23 NZ$M
Operating cash flow	324.3	238.2
Capital expenditure (including purchases of intangible assets)	(169.8)	(211.3)
Lease liability payments	(14.0)	(14.4)
Free cash flow	140.5	12.5

	FY22 NZ$M	FY23 NZ$M
Net cash / (debt) (including short-term investments)	221.6	37.7
Total assets	2,107.0	2,204.5
Total equity	1,679.7	1,753.4
Gearing (net debt / net debt + equity)*	-16.3%	-2.3%
Undrawn committed debt facilities	184.5	624.5

* Calculated using net interest-bearing debt (debt less cash and cash equivalents) to net interest-bearing debt and equity (less hedge reserve).

Dividend

- Increased final dividend by 2%
  - 23.0 cps + 8.94 cps imputation credit for NZ residents (gross dividend of NZ 31.94 cps)
  - Fully imputed
  - 4.06 cps non-resident supplementary dividend
- Total dividend for the year increased by 3% to 40.5 cps
- The company's dividend reinvestment plan is available for eligible shareholders with a 3% discount



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Foreign exchange effects

Reconciliation of Constant Currency to Reported Revenue	FY22 NZ$M	FY23 NZ$M	Change NZ$M
Revenue (constant currency)	**1,645.1**	**1,497.7**	**(147.4)**
Spot exchange rate effect	2.6	79.9	77.3
Foreign exchange hedging result	39.3	(7.5)	(46.8)
Balance sheet revaluation	(5.3)	11.0	16.3
Total impact of foreign exchange	36.6	83.4	46.8
Revenue (as reported)	**1,681.7**	**1,581.1**	**(100.6)**

Reconciliation of Constant Currency to Reported Profit After Tax	FY22 NZ$M	FY23 NZ$M	Change NZ$M
Profit after tax (constant currency)	**349.2**	**212.2**	**(137.0)**
Spot exchange rate effect	(0.1)	33.4	33.5
Foreign exchange hedging result	29.9	2.6	(27.3)
Balance sheet revaluation	(2.1)	2.1	4.2
Total impact of foreign exchange	27.7	38.1	10.4
Profit after tax (as reported)	**376.9**	**250.3**	**(126.6)**

Outlook FY24

Operating Revenue Guidance

- Guidance assumptions result in:
    - operating revenue of approximately $1.70 billion at May 2023 exchange rates*; and
    - approximately similar revenue growth rates for Hospital and Homecare product groups.

Hospital hardware sales are difficult to predict. We have included approximately $115M of hospital hardware sales for the full year within our guidance.

Gross Margin and Operating Expenses

- Gross margin improvement of approximately 200 basis points in CC, 100 bps reported*.
- Operating expense growth of approximately 12% reported*.

Interest and Tax

- Interest expense expected to be approximately $16M
- Assumes approximately 60% of R&D will be eligible for R&D Tax Credit at 15%.

Capital Expenditure

- Expected to be approximately $450M

* At May 2023 exchange rates of NZD:USD 0.63, NZD:EUR 0.58, NZD:MXN 12.00
CC: constant currency

Key Financials

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Key full year financial results

FY23 (12 months to 31 March 2023)

	% of Revenue	NZ$M	△PCP^	△CC*
Operating revenue	**100%**	**1,581.1**	**-6%**	**-9%**
Hospital operating revenue	65%	1,023.4	-15%	-18%
Homecare operating revenue	35%	553.8	18%	13%
Hospital new applications consumables revenue			-3%	-6%
OSA masks revenue			23%	17%
Gross margin / Gross profit	59%	938.4	-325bps	-369bps
SG&A	27%	(431.9)	10%	4%
R&D	11%	(174.3)	13%	13%
Total operating expenses	38%	(606.2)	11%	7%
Operating profit	**21%**	**332.2**	**-34%**	**-39%**
Profit after tax	**16%**	**250.3**	**-34%**	**-39%**

^ PCP = prior comparable period * CC = constant currency

Hedging cover

- 45% of operating revenue in US$ (FY22: 49%) and 20% in € (FY22: 18%).

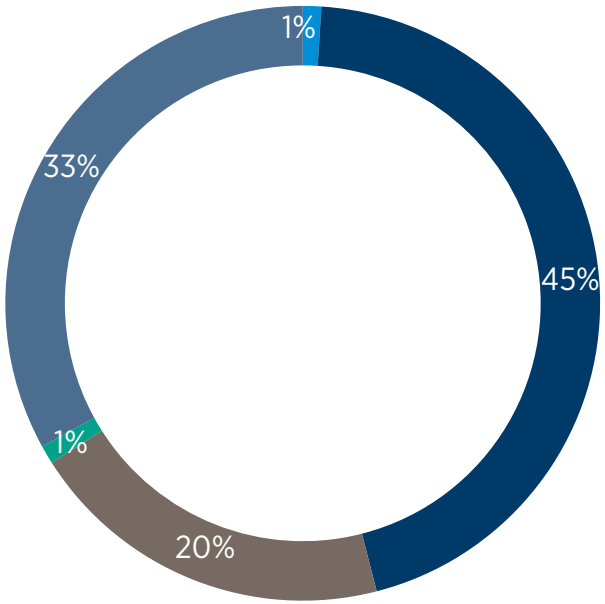
Hedging position for our main exposures (as at 12 May 2023)	Year to 31 March FY24	FY25	FY26	FY27	FY28	FY29-FY31+
USD % cover of estimated exposure	85%	70%	60%	50%	30%	5%
USD average rate of cover	0.659	0.623	0.608	0.596	0.584	0.526
EUR % cover of estimated exposure	70%	55%	40%	35%	20%	0%
EUR average rate of cover	0.538	0.523	0.531	0.523	0.524	0.530
MXN % cover of estimated exposure	55%	35%	10%	-	-	-
MXN average rate of cover	16.348	16.348	17.043	-	-	-

Hedging cover percentages have been rounded to the nearest 5%

Revenue and expenses by currency

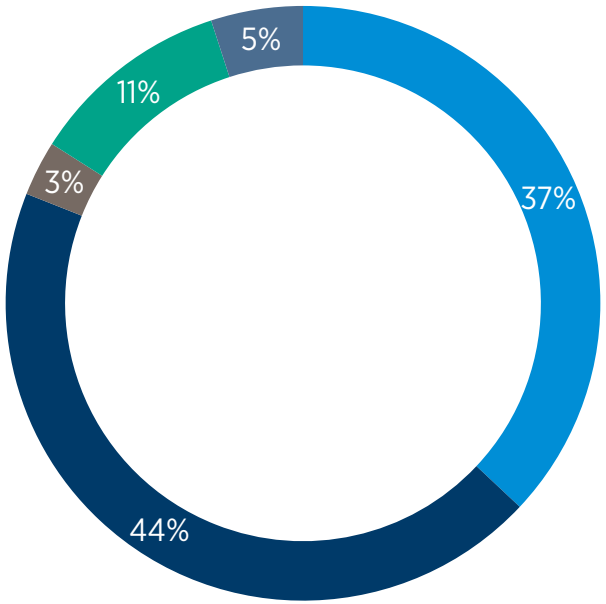
FY23 (for the year ended 31 March 2023)

REVENUE BY CURRENCY



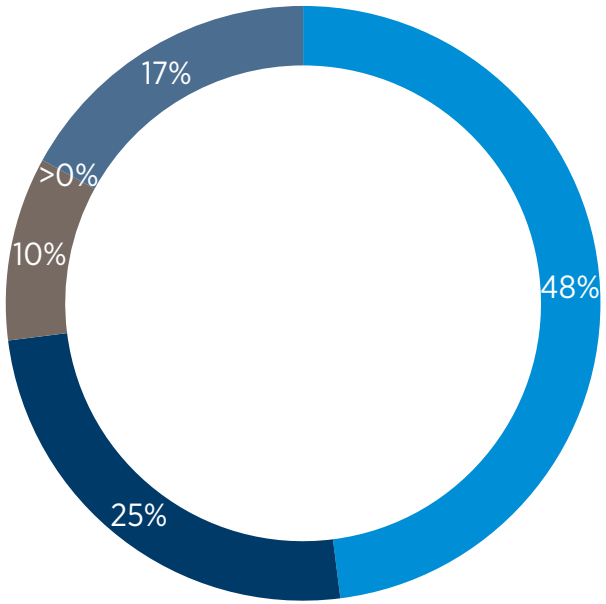
NZD USD EUR MXN Other

COST OF SALES BY CURRENCY



NZD USD EUR MXN Other

OPERATING EXPENSES BY CURRENCY



NZD USD EUR MXN Other

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Overview

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Fisher & Paykel Healthcare at a glance

Global leader in respiratory humidification devices

- Medical device manufacturer with leading positions in respiratory care and obstructive sleep apnea
- >50 years' experience in changing clinical practice to solutions that provide better clinical outcomes and improve effectiveness of care
- Estimated NZ$25+ billion and growing market opportunity driven by demographics
- Significant organic long-term growth opportunities in acute and chronic respiratory care, OSA and surgery
- Large proportion (85%) of revenue from recurring items, consumables and accessories
- High level of innovation and investment in R&D with strong product pipeline
- High barriers to entry

Global presence

Our people are located in

53 countries

3,538	2,147	379	500
in New Zealand	in North America, including Mexico	in Europe	in the rest of the world

Strong financial performance

- Continued target, and history of, doubling our revenue (in constant currency terms) every 5 to 6 years
- Targeting gross margin of 65% and operating margin of 30%
- Growth company with a strong history of increasing dividend payments

Note: people numbers are represented as full-time equivalents

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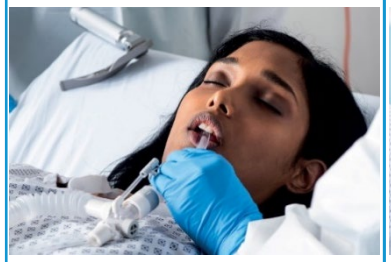
~NZ$25+ billion and growing market opportunity

Total addressable market estimates

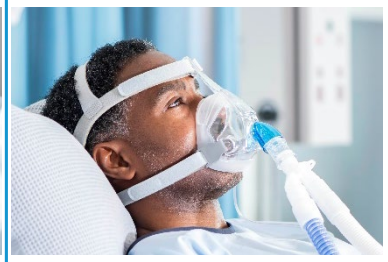
HOSPITAL

~150+ million patients

Invasive Ventilation

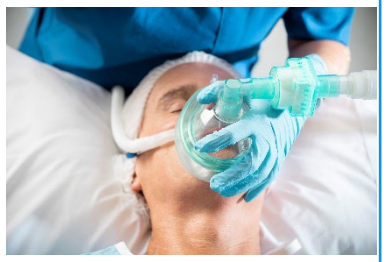


Noninvasive Ventilation



Hospital Respiratory Support

Anesthesia



Infant Care

Surgical

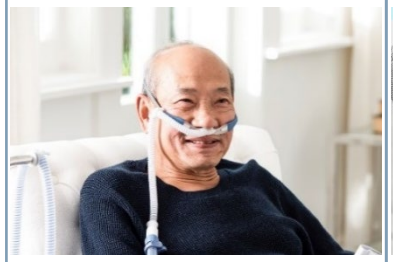
NEW APPLICATIONS

Applications outside of invasive ventilation

HOMECARE

~100+ million patients

Home Respiratory Support



Obstructive Sleep Apnea

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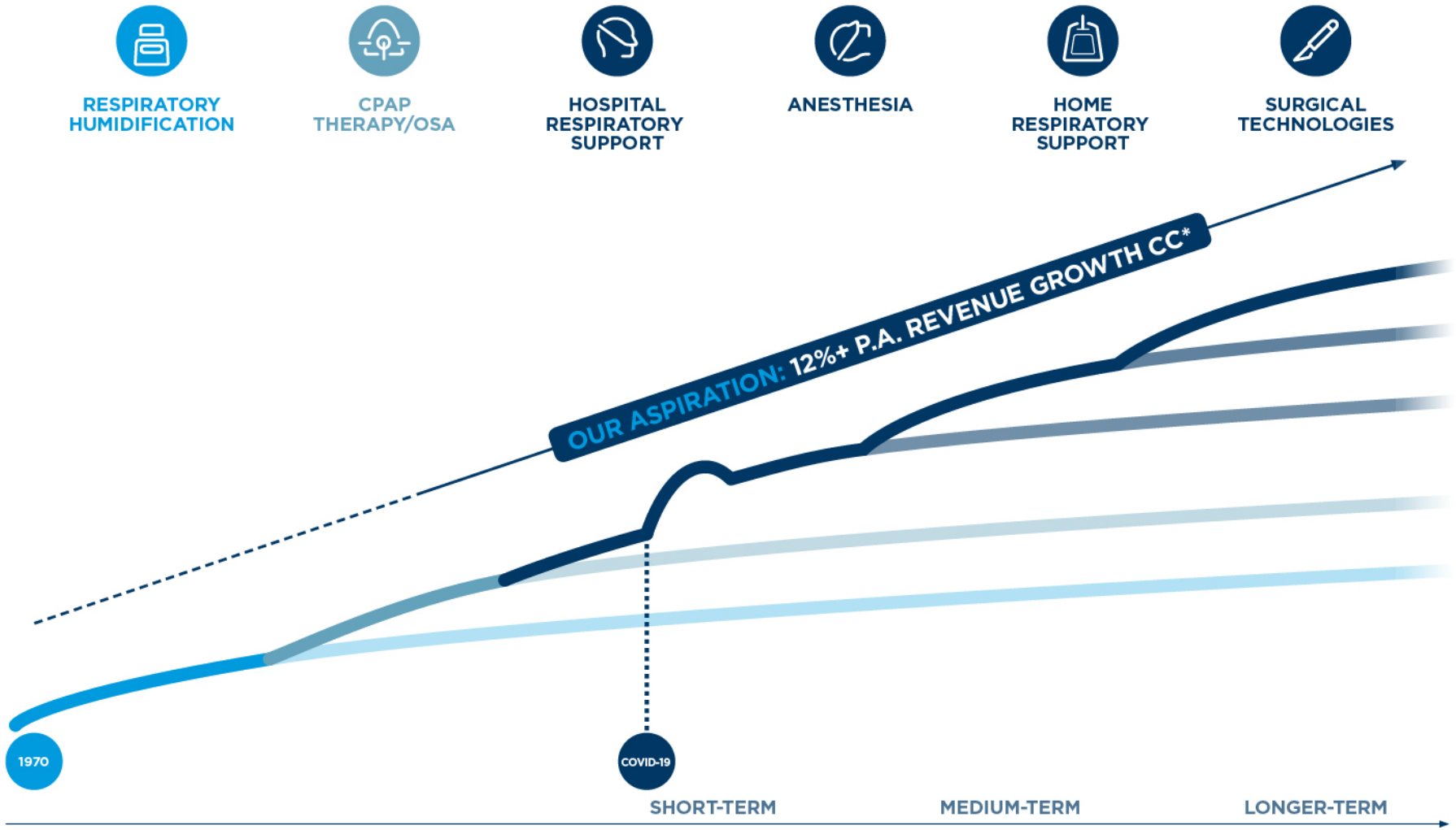
Our aspiration



OUR ASPIRATION:
Sustainably DOUBLING our constant currency revenue every 5-6 years.

The image above is an illustration of the company's long-term growth aspirations. It is not a graph and should not be interpreted as being indicative of levels of revenue or profitability in the short term.

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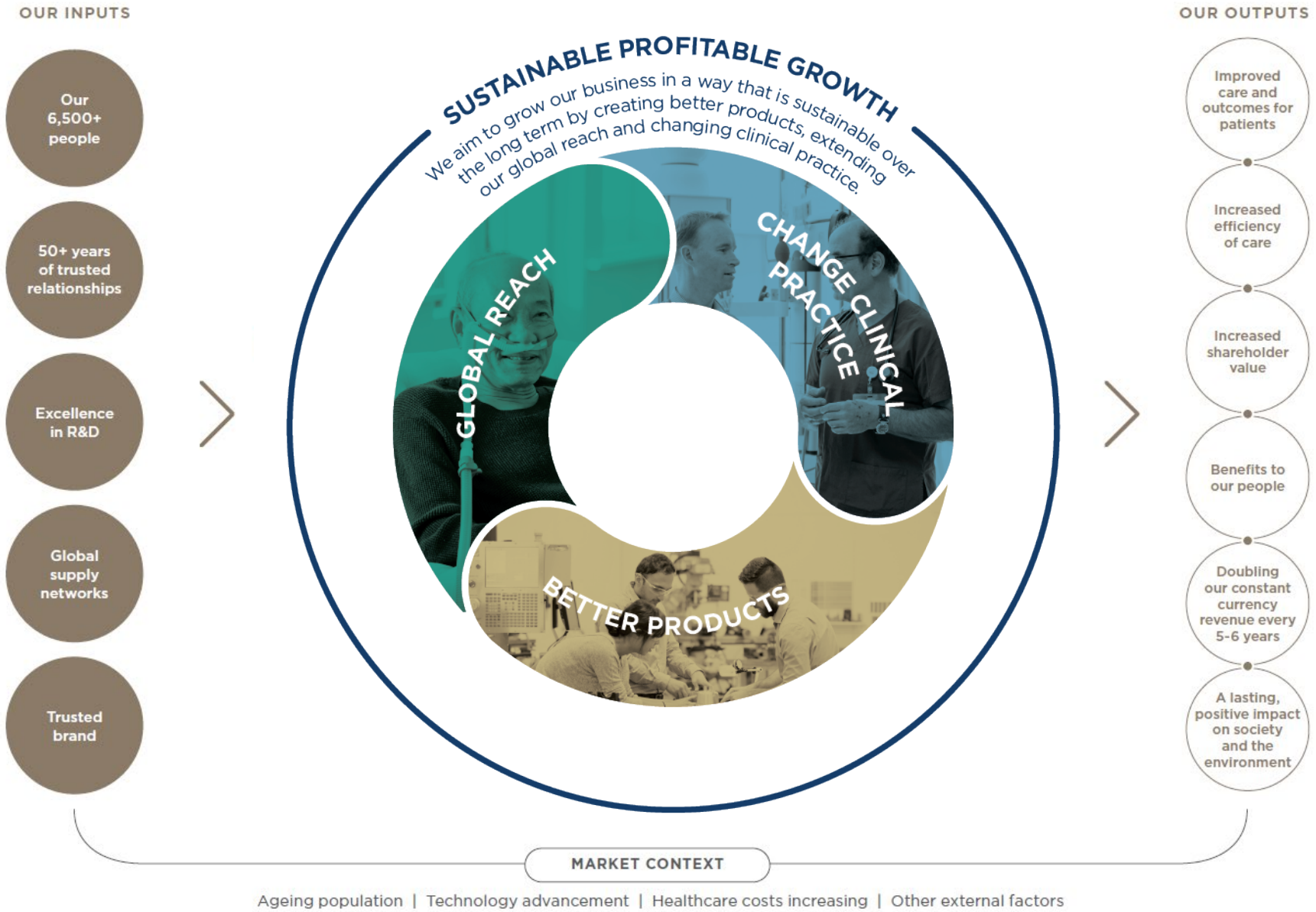
Consistent growth strategy



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F&P product fundamentals

What are we here to do?

A drive to not only improve, but transform, clinical practice.
Provide products with protected value differentiation.
Get our products, including the evidence, knowledge and supporting tools, into the hands of the customer

A deep understanding of the problem and knowing what we are trying to achieve, leads to valued, innovative solutions

- A patient-focused approach
- A drive to deliver and improve
- Long-term thinking

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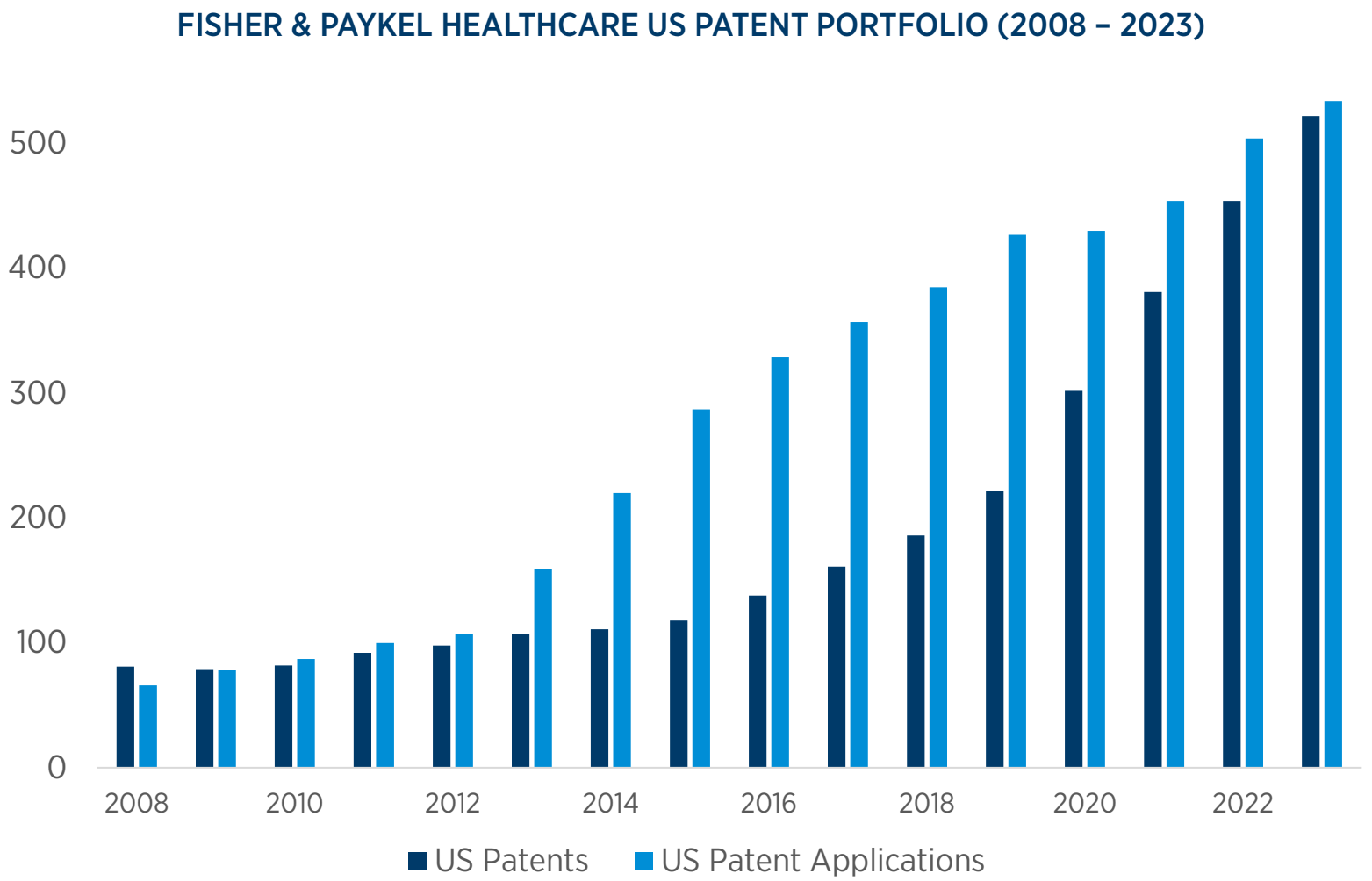
High level of innovation and investment in R&D

- R&D represents 11% of operating revenue*: NZ$174.3M
- Product pipeline includes:
  - Humidifier controllers
  - Masks
  - Respiratory consumables
  - Flow generators
  - Compliance monitoring solutions
- 522 US patents, 534 US pending, 2,329 Rest of World patents, 1,708 Rest of World pending†

* For year ended 31 March 2023
† As at 31 March 2023

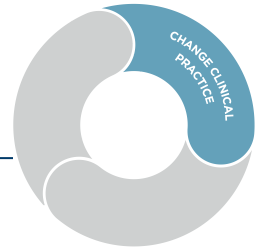
Growing patent portfolio



Average remaining life of FPH patent portfolio (all countries): 11.2 years*

* As at 31 March 2023

Changing Clinical Practice



- Using clinical evidence to drive change
- Multi-layered with multiple stakeholders
- Building confidence with usage inline with the evidence, demonstrating value
- Products in each care area builds familiarity and confidence
- Customer experience builds trust and confidence

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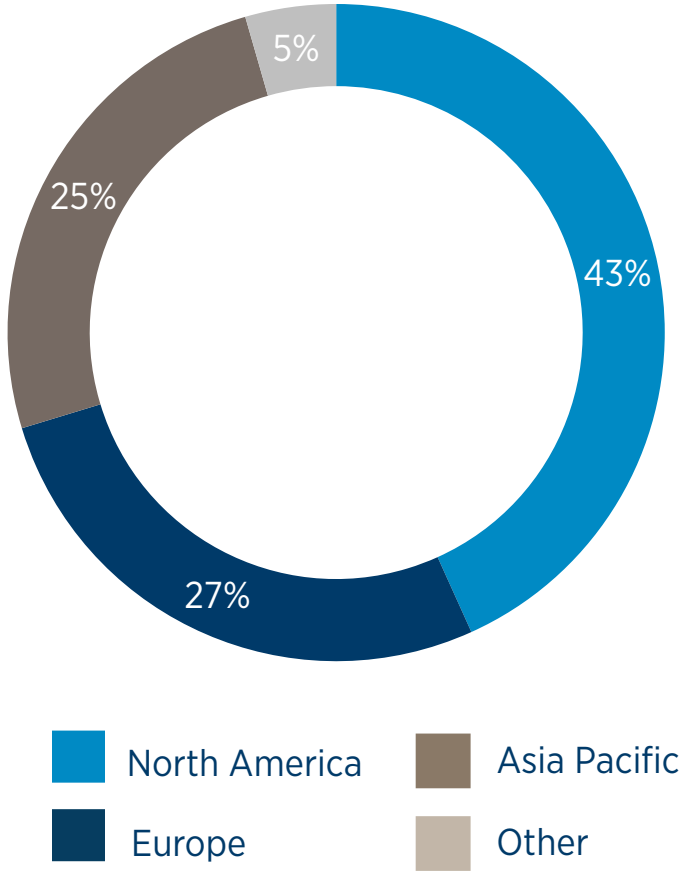
Strong global presence

- **Direct/offices**
  - Hospitals, home care dealers
  - Sales/support offices in North America, Europe, Asia, South America, Middle East and Australasia, 18 distribution centres
  - ~1,300 employees in 53 countries
  - Ongoing international expansion
- **Distributors**
  - +180 distributors worldwide
- **Original Equipment Manufacturers**
  - Supply most leading ventilator manufacturers
- **Sell in more than 120 countries**

Revenue by Region
12 months to 31 March 2023



Hospital

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Impact of changing demographics

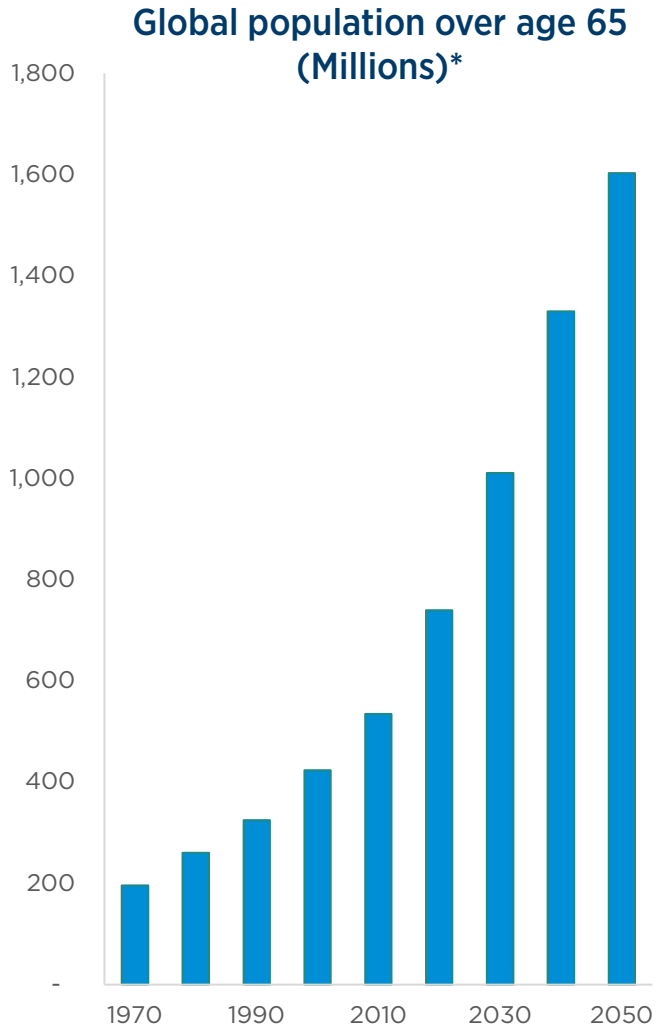
Population age and weight both increasing

- Global population 60 years+ is expected to more than double over the next 30 years[1]
- 18% of adults are forecast to be obese by 2030[2]

40-50% of healthcare spend is on persons 65 years and older, in OECD countries[3]

Low-upper middle income markets increasing healthcare spending

- Total health spending is increasing more rapidly in low–upper middle income countries (4 to 5% on average) than in high income countries (~2%)[4]



* Source: United Nations world population prospects - medium-fertility scenario

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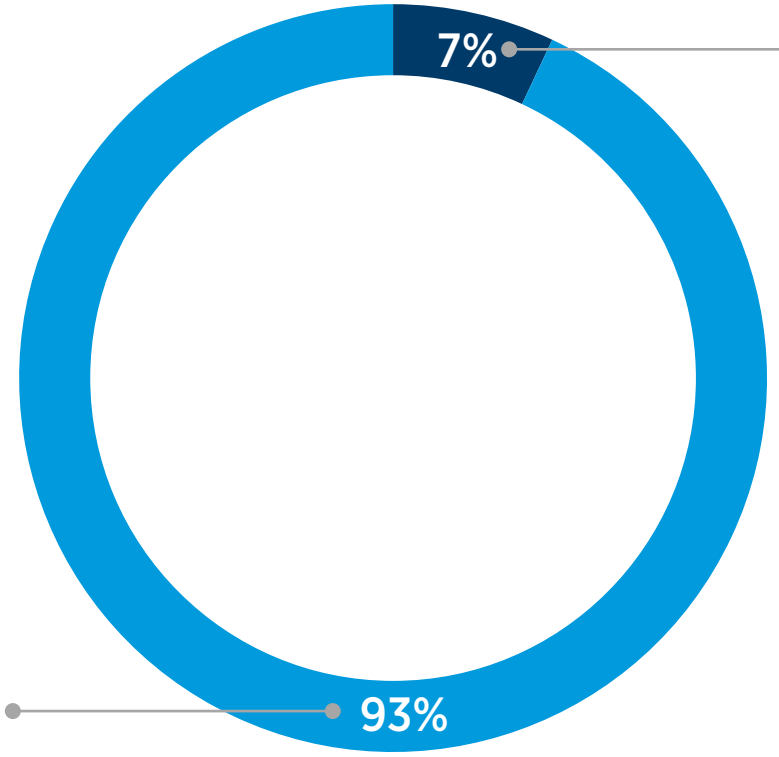
Hospital cost breakdown



Other – includes labour, utilities, drugs, supplies, food, depreciation.

Source: (2022). The European Medical Technology in Figures. MedTech Europe from diagnosis to cure. https://www.medtecheurope.org/datahub/expenditure/#sources

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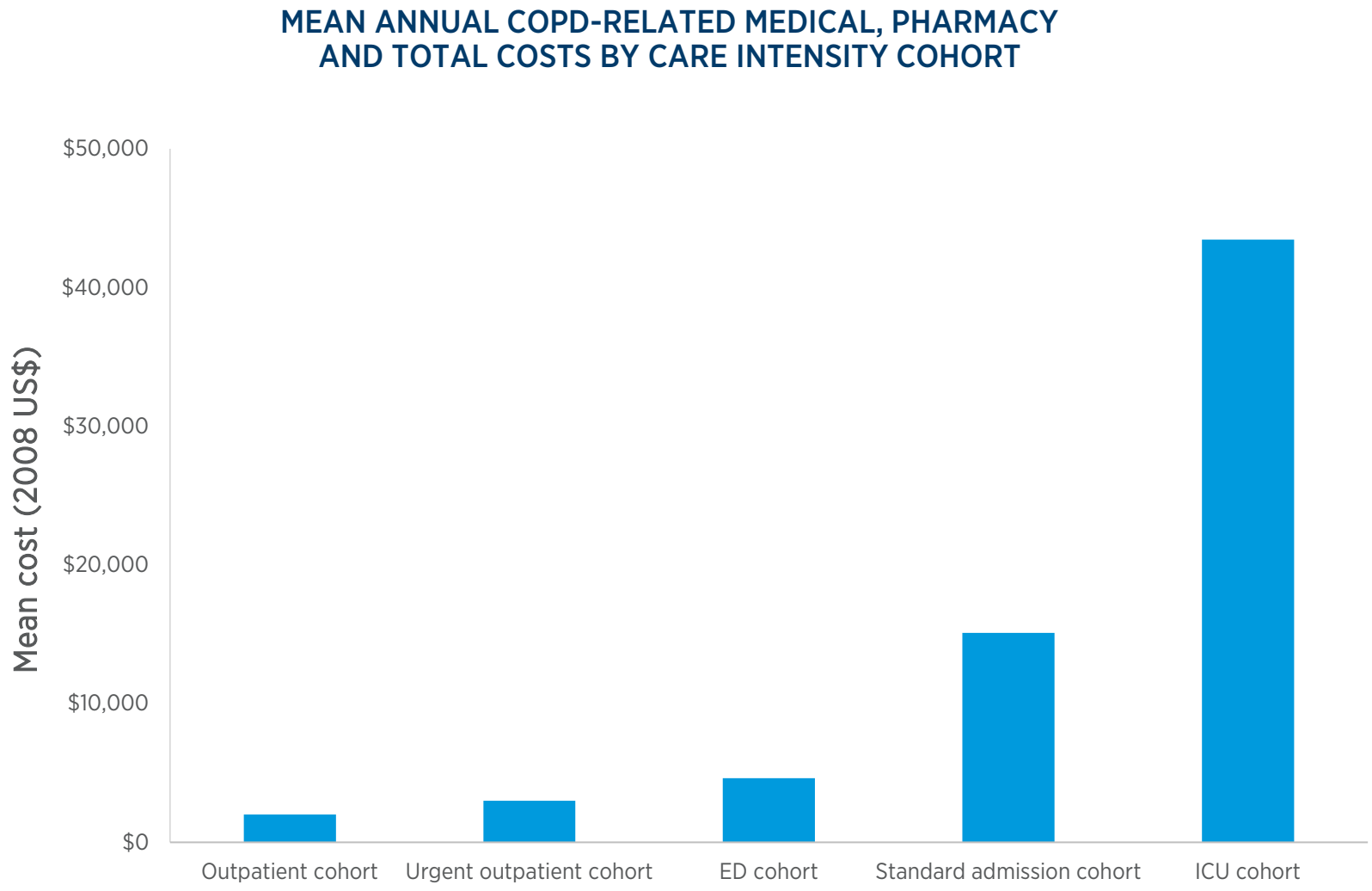
Lower care intensity = lower cost



Source: Anand A Dalal, Laura Christensen, Fang Liu, and Aylin A Riedel. Direct costs of chronic obstructive pulmonary disease among managed care patients. *Int J Chron Obstruct Pulmon Dis*. 2010; 5: 241-249.

Respiratory humidification

- Normal airway humidification is bypassed or compromised during ventilation or oxygen therapy
- Mucociliary transport system operates less effectively
- Need to deliver gas at physiologically normal levels
  - 37°C body core temperature
  - 44mg/L 100% saturated

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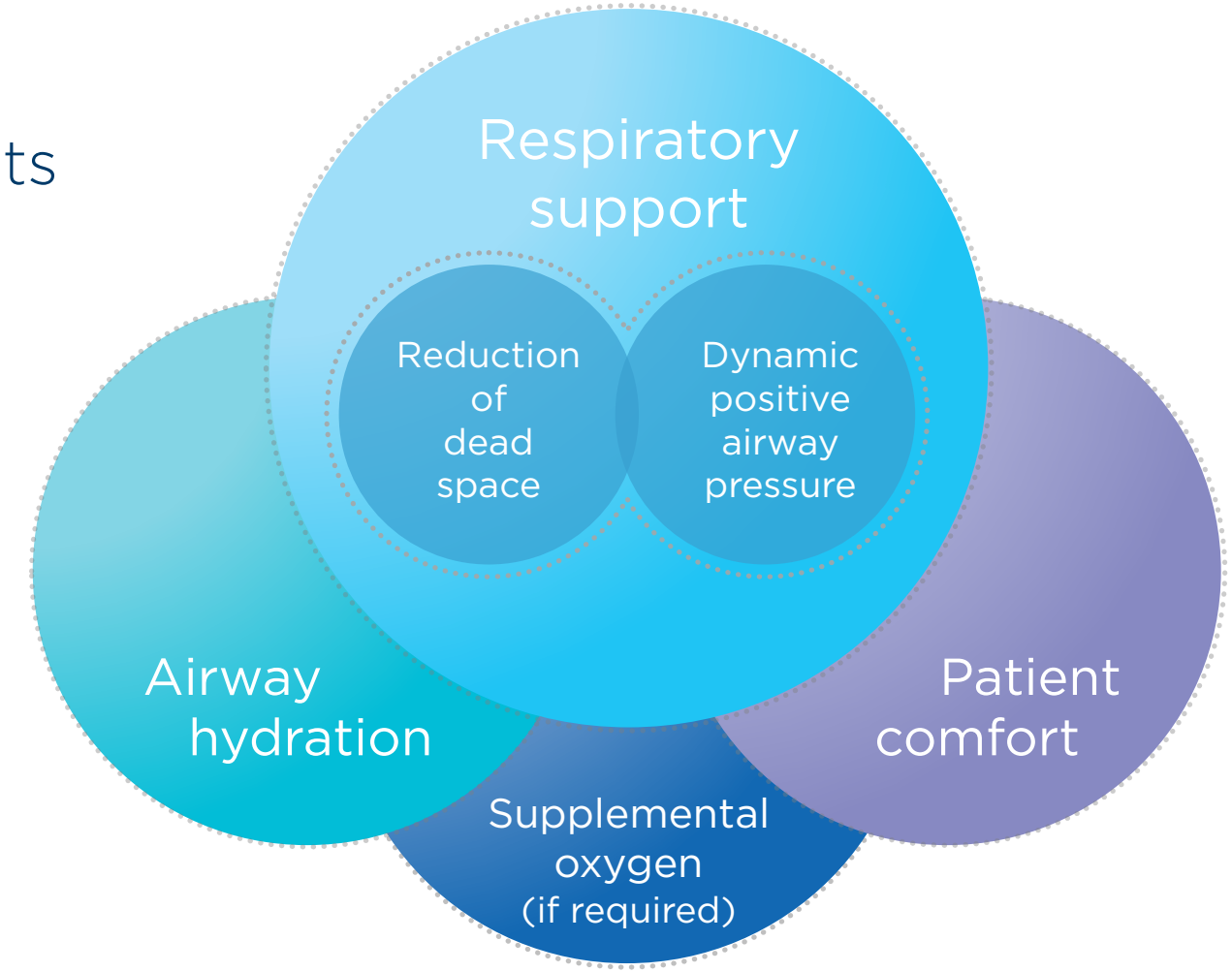
Optiflow nasal high flow therapy

Mechanisms of action

Spontaneously breathing patients with or at risk of respiratory compromise



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Optiflow - displacing conventional oxygen therapy

CONVENTIONAL OXYGEN THERAPY

Low flow nasal prongs

Simple face mask

Rebreather mask

NON-INVASIVE VENTILATION

F&P **Optiflow**

Nasal high flow therapy

~6million

Estimated patients were treated with our Optiflow nasal high flow therapy over the past year

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Patient groups who may benefit from Optiflow

ADULTS:

- Acute respiratory failure
- Asthma
- Atelectasis
- Bronchiectasis
- Bronchitis
- Burns
- COPD
- Chest trauma
- Emphysema
- Palliative Care
- Pneumonia
- Pulmonary embolism
- Respiratory compromise
- Viral pneumonia
- Carbon monoxide poisoning

PAEDIATRICS/NEONATES:

- Infant respiratory distress
- Bronchiolitis

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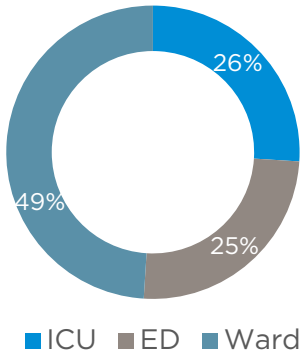
Opportunity for Optiflow therapy across the hospital

Areas in the hospital that provide some form of respiratory support to patients:

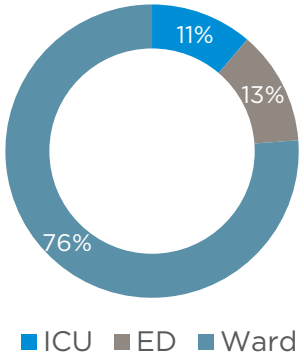
- Medical Intensive Care Units
- Surgical Intensive Care Units
- Emergency Departments (ER)
- Floor/Ward

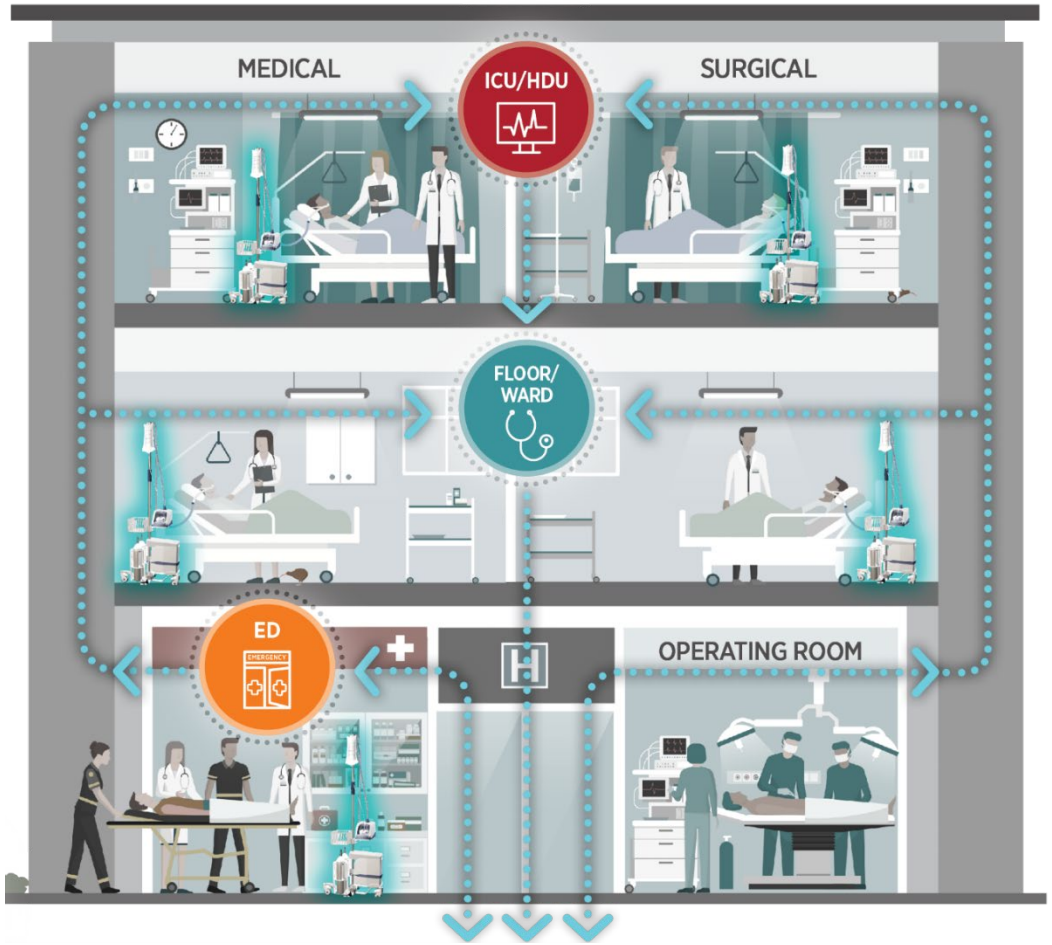
Case study of well penetrated hospital network*

Optiflow Usage



Airvo hardware location





Large global opportunity to increase utilisation of Optiflow outside ICU

* Given the lack of data showing usage of respiratory support by department, the following information is based on surveys conducted by F&P Healthcare of four major metropolitan hospitals for the 2022 calendar year.

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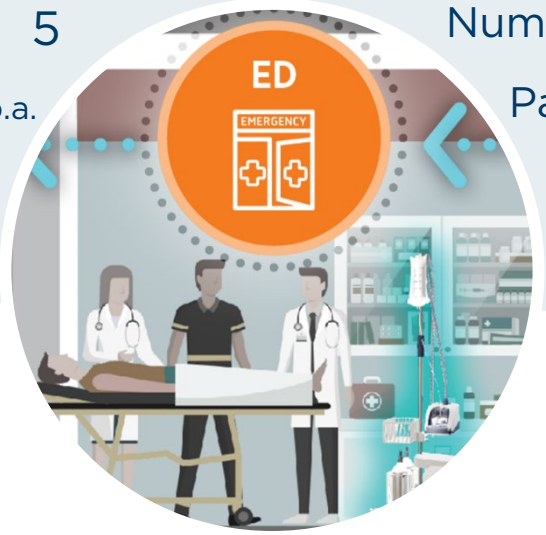
Hardware Utilisation v Patients Treated

Hypothetical example
100 bed ED, seeing 100k patients a year. Assume 20% of all patients visiting this ED require some form of respiratory support and the ED's protocol would result in 5% of those patients requiring Optiflow therapy (i.e. 1,000 patients a year).

Scenario 1: Hardware Utilisation	
Number of F&P Airvos:	5
Patients treated with Optiflow*:	900 p.a.
Consumable sets:	900 p.a.
Hardware turn rate monthly:	15

Scenario 2: Patients Treated	
Number of F&P Airvos:	10
Patients treated with Optiflow:	1,000 p.a.
Consumable sets:	1,000 p.a.
Hardware turn rate monthly:	8.3



- ✘ Lower capacity
- ✘ Fewer patients treated
- Higher turn rate

- ✓ Greater capacity
- ✓ More patients treated
- Lower turn rate

Key metric: Number of patients treated

* Assumes there are times during the year where there is not sufficient F&P Airvo hardware available to treat all patients requiring Optiflow therapy.

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Clinical practice guidelines: Nasal high flow therapy

	SUPPORTING CLINICAL PRACTCE GUIDELINES	EMERGENCY DEPARTMENT	ICU/HDU	RESPIRATORY	GENERAL
 **Primary support MEDICAL**	ESICM, ERS, SSC, AARC, ACP, TSANZ, WHO	✓	✓	✓	
 **Primary support POST-OPERATIVE**	ESICM, ERS		✓		
 **Pre-escalation support/ Peri-intubation**	ESICM	✓	✓		
 **Post-extubation/ De-escalation support**	ESICM, ERS, AARC, ACP		✓		
 **Complementary support** (NIV-rested/proning)	ERS	✓	✓	✓	✓
 **Prophylactic support** (Require oxygen/avoid escalation)	AARC	✓	✓	✓	✓

Clinical practice guidelines – ESICM[11], ERS[12], SSC[13], AARC[14], ACP[15], TSANZ[16], WHO[17]

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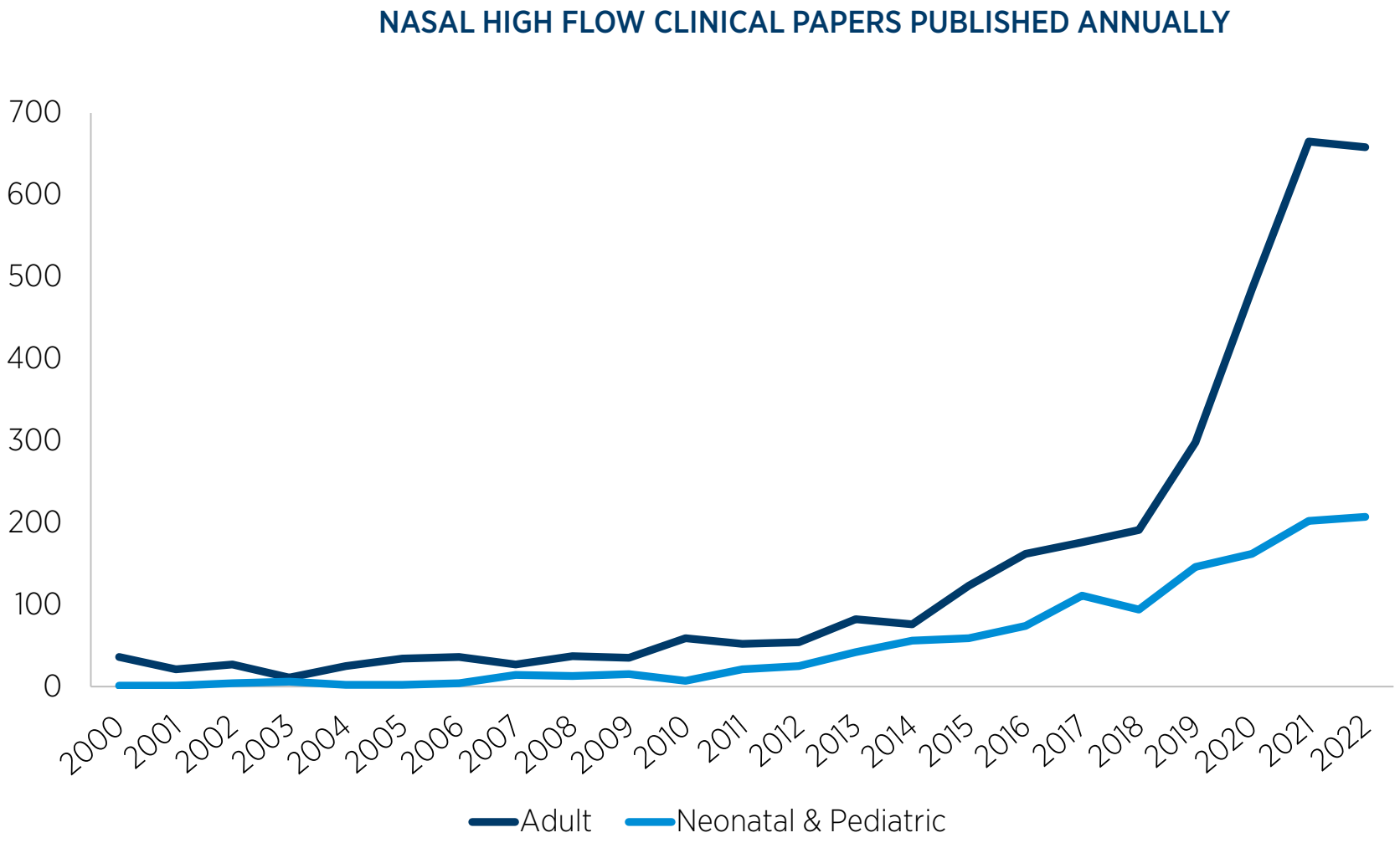
Optiflow NHF - a growing body of clinical evidence



- The publication of 865 clinical papers on NHF signifies the high level of clinical interest in the therapy

Source: PubMed

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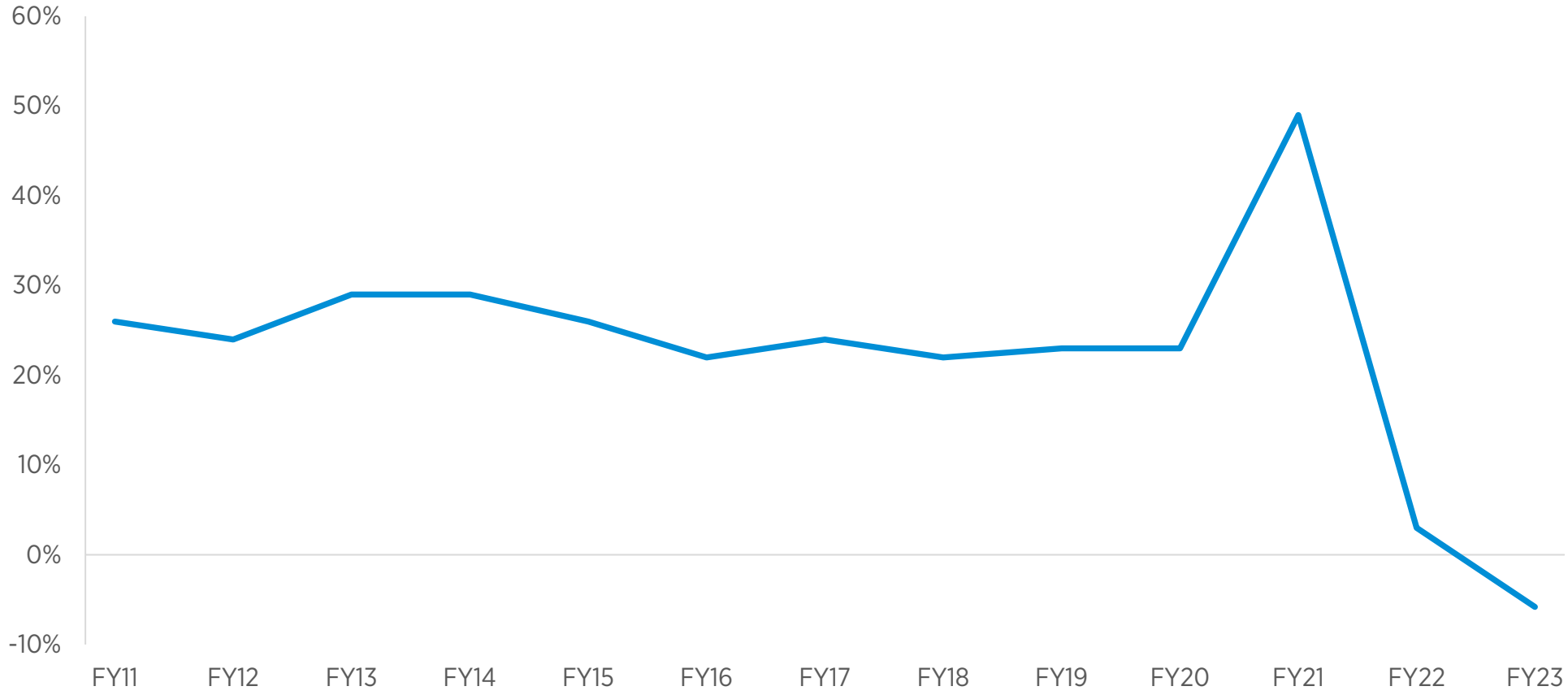
History of growth in hospital new applications

CONSTANT CURRENCY REVENUE GROWTH RATE IN NEW APPLICATIONS CONSUMABLES*



New applications consumables: Non-invasive ventilation, Optiflow, Anesthesia, Surgical

* Adjusted to exclude impact of US distribution transition in FY16 and FY17

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Homecare

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Obstructive Sleep Apnea

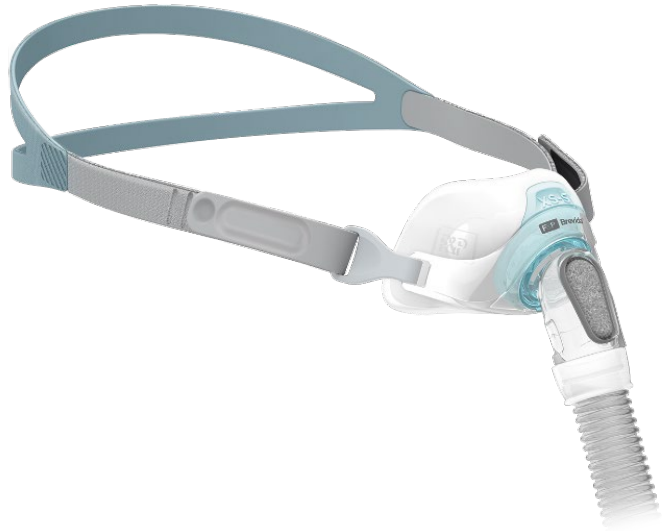
- Obstructive sleep apnea is an underdiagnosed medical condition, with multiple negative outcomes to patients' health.
- It can greatly impair quality of sleep, leading to fatigue; also associated with hypertension, stroke and heart attack
- Estimate >100 million people affected in developed countries
- Most common treatment is CPAP (Continuous Positive Airway Pressure)
  - Key issue with CPAP is compliance
  - Humidification provides significant acceptance and compliance improvements

Mask matters most

- Masks are key to compliance
- Unique, patented designs
- Released our new Evora™ Full OSA mask in the United States.

F&P Evora Nasal

F&P Evora Full



F&P Brevida

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Home respiratory support

- Chronic obstructive pulmonary disease (COPD) is a lung disease which is commonly associated with smoking
- Emphysema and chronic bronchitis are both forms of COPD
- Chronic respiratory disease, primarily COPD, is the third leading cause of death in the world[6]
- 6% of US adults have been diagnosed with COPD[7] (~15 million people)
- 4-10% COPD prevalence worldwide[8] (~400 million people)
- Emerging evidence for COPD patients using NHF at home, reduced exacerbation rates[5], reduced hypercapnia[9,10], and improved quality of life[9,10].

Manufacturing and operations

New Zealand

- Four buildings: 110,000 m^2 / 1,180,000 ft^2
- Co-location of R&D and manufacturing
- Continued earthworks on building 5
- Received Overseas Investment Office approval for the purchase of land in Karaka for our second New Zealand campus

Tijuana, Mexico

- Three buildings: 63,000 m^2 / 690,000 ft^2

Guangzhou, China

- Commenced development of our new manufacturing facility in China.

Artist's rendering of the company's future second campus in Karaka, Auckland

Environmental, Social & Governance

Our People

The Board approved a discretionary profit-sharing payment of $10 million for company employees. Our people have continued to overcome supply chain issues and worked tirelessly to meet global demand surges over the last three years.

Community and Volunteer Groups

We are proud of the community groups supported through the Fisher & Paykel Healthcare Foundation. During the 2023 financial year, the Foundation provided funding of $924,000 to organisations working in local communities.

Refer to our 2023 Annual Report for more details.

Sustainable Procurement

FY23 Highlights:

- Launched our new Sustainable Procurement Framework to suppliers
- Completed recruitment of sustainable procurement specialist to cover the Asia region
- Extended our Speak Up Procedure to suppliers

Key Environmental Metrics

	FY21	FY22	FY23
Scope 1 emissions (tonnes CO_2e)	1,465	1,777	2,287
Scope 2 emissions (tonnes CO_2e)*	14,542	13,894	14,529
Scope 3 emissions (tonnes CO_2e)	718,991	457,112	328,313
Total emissions (tonnes CO_2e)*	734,998	472,783	345,129
Water usage (cubic metres)	134,900	184,171	133,517
Landfill waste diverted (cubic metres)	1,630	2,035	1,727
NZ recycling efficiency (percentage of waste diverted from landfill)	62%	68%	62%
Global recycling efficiency (percentage of waste diverted from landfill)	29%	52%	54%

Sustainability disclosures and indices

We participate annually in a suite of well-respected sustainability disclosure programmes and are included in the Dow Jones Sustainability Index and the FTSE4Good index.

Member of

Dow Jones Sustainability Indices

Powered by the S&P Global CSA

FTSE4Good

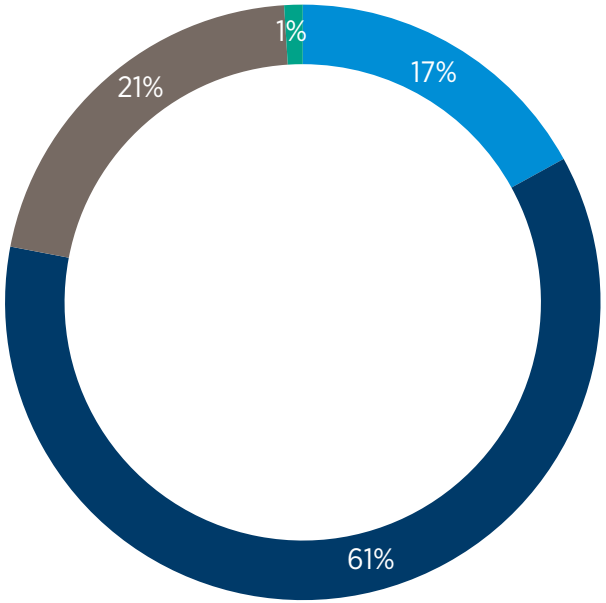
CDP

* Scope 2 reflects location based emissions

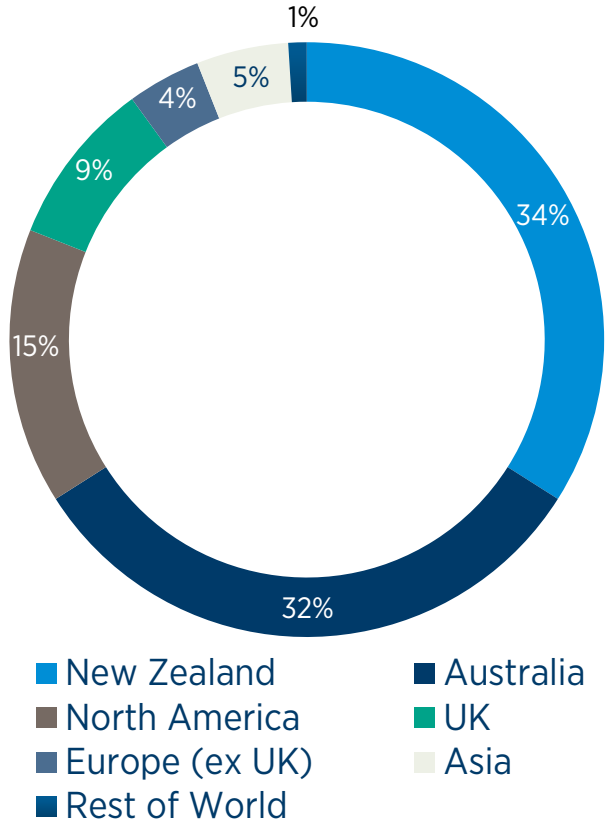
Ownership structure and listings

- Listed on NZX and ASX (NZX.FPH, ASX.FPH)

Shareholding structure as at 31 March 2023



Geographical ownership as at 31 March 2023



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