Expert call | Accelerating growth in home dialysis

August 30, 2022

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Expanding home dialysis, a key strategic priority

Advancing our growth strategy

Addressing several challenges & opportunities

- Increase patient choice
- Improve outcomes & reduce costs
- Address labor shortage
- Support clinic network optimization
FME well positioned to continue to lead market in home growth

Vertically integrated business with full suite of home dialysis products
- Includes market leading PD, HHD, and Connected Health products

Supporting infrastructure already in place
- Training
- 24/7 support
- Distribution & logistics

Established home programs supported by in-center experience and network
- >1,200 active home programs
- Home treatments >15% in U.S.
- Global Medical Office
- FKC national clinic footprint

Leading technology
- VersiPD
- Kinexus PDTherapy Management Platform
- Biofine PD Solutions Bag
- NxStage SystemOne
- PureFlow Dialysate System
- Nx2me Connected Health

Established infrastructure
- TruBlu logistics
- FKC national clinic footprint

Scale & expertise
Extraordinary patient satisfaction levels

World class Net Promotor Score (NPS) across both PD & HHD\(^1\)

Note: 1 | Fresenius Home Patient NPS as of 2021; “World Class” defined as NPS > 70

- Net promoters
- Passive
- Detractor

NPS
72
Dialysis patients benefit from more frequent dialysis (MFD)

Greater potential for MFD at home

- Flexibility for treatments every other day
- Payors supportive

4 treatments per week for average FME HHD patient

MFD associated with

- Statistically better blood pressure control
- Shorter interdialytic interval and lower mortality related to the long interdialytic interval
- Less cardiac remodeling from volume shifts
- Lower ultrafiltration rates
- Better bone and mineral metabolism parameters
- Health-related quality of life improvements
Home dialysis growth set to accelerate

New aspirational target

25% of dialysis treatments in the U.S. to be performed in a home setting by 2025

Key drivers to achieve target

80% | Increase home access
▪ In-Center to home
▪ New patient direct to home
▪ Transition PD to HHD

20% | Increase home retention
▪ Training and at home success
## Opportunity for growth in both PD and HHD treatments

### Peritoneal dialysis

- **Starting modality of choice, given**
  - some remaining kidney function
  - effective for 3-5 years
- **Growth driven by earlier detection through CKD management & education**

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<thead>
<tr>
<th>% U.S. home treatments¹</th>
<th>Growth potential 2022-2025</th>
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<td>68%</td>
<td>Mid-to-high single digit</td>
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### Home hemodialysis

- **Increase awareness and training**
- **Growth sourced from**
  - re-education of in-center patients
  - new incidents
  - transition from PD

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<tr>
<th>% U.S. home treatments¹</th>
<th>Growth potential 2022-2025</th>
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<td>32%</td>
<td>~ twenty percent</td>
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Note: 1) percent of U.S. home treatments as of Q2 2022
TCUs essential to increasing and retaining home patients

~100 Transitional Care Units (TCUs) across the U.S. supporting ~400 home programs

1 out of 3 patients educated in a TCU choose home versus 1 out of 20 without a TCU

Patients going through TCU’s see multiple other clinical advantages

- More likely to survive and less likely to be hospitalized during follow-up
- More likely to be referred/wait listed for kidney transplant
- Higher rates of AV access (versus catheter) post TCU

Note: 1) Versus matched controls
Home penetration in select markets indicates growth opportunity

- Home penetration varies by market
- Opportunity to share learnings from larger home markets

Current treatment mix

- <15% home
- 15-25% home
- >25% home

- Springfield, MO: 37%
- Phoenix, AZ: 11%
- Dallas, TX: 9%
- Omaha, NE: 34%
- Greenville, NC: 24%
- Orlando, FL: 21%
- Indianapolis, IN: 22%
- Salt Lake City, UT: 25%
- Chicago, IL: 5%
- Newark, NJ: 7%
- Dayton, OH: 27%
PD innovation | VersiPD Cycler System

PD therapy...simplified. Highest level of care. Lowest level of complexity

The **smallest**, **lightest**, and **quietest** PD cycler available, the VersiPD Cycler System is designed to fit where – and how – patients live. It aims to **enable independence**, **shrink the learning curve**, and **make dialysis therapy smarter**.
PD innovation | Kinexus Therapy Management Platform

Connected Health technology…

...can improve outcomes

- Increase time on PD
  - Increase average length of stay on PD by 3.5 months
- Increase patient retention
  - Reduce patient dropout by 15%
- Timely intervention

...reliable and easy to use

- Over 15,000 patients connected
- No internet required
  - uses cellular connection
## HHD innovation | market leading technology with NxStage One

<table>
<thead>
<tr>
<th>Simple</th>
<th>Portable</th>
<th>Reliable</th>
<th>Modular</th>
<th>Connected</th>
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| ▪ Simple interface easy to learn and use  
▪ Easy-to-use drop-in cartridge  
▪ Simple plumbing connections and standard electrical plug | ▪ >70% of patients take advantage  
▪ Only HHD system in the U.S. that allows it | ▪ **Only** model with FDA approval for solo and nocturnal treatments  
▪ 24-hour service swap model | ▪ Option to use dialysate fluid prepared at home or premixed dialysate bags | ▪ Nx2me shown to improve patient retention  
▪ 29% lower therapy discontinuation rate and reduced training time |
HHD innovation | GuideMe interface targeted for mid-2023

Device evolution to optimize key value drivers for patients

GuideMe interface

- New level of usability within the existing platform
- Enhanced troubleshooting
- Machines already in the field can be upgraded

Today

Target mid-2023
Home growth potential outside the U.S. in mid-to-long term

Technological improvements & connectivity increasing opportunity for home treatments around the world

COVID-19 pandemic raised awareness and highlighted benefits of home therapies

Home eases pressure on global nurse shortages in developed and emerging markets

Some healthcare systems in EMEA beginning to introduce home dialysis targets

Home therapies can increase access to dialysis care in countries with limited clinic infrastructure