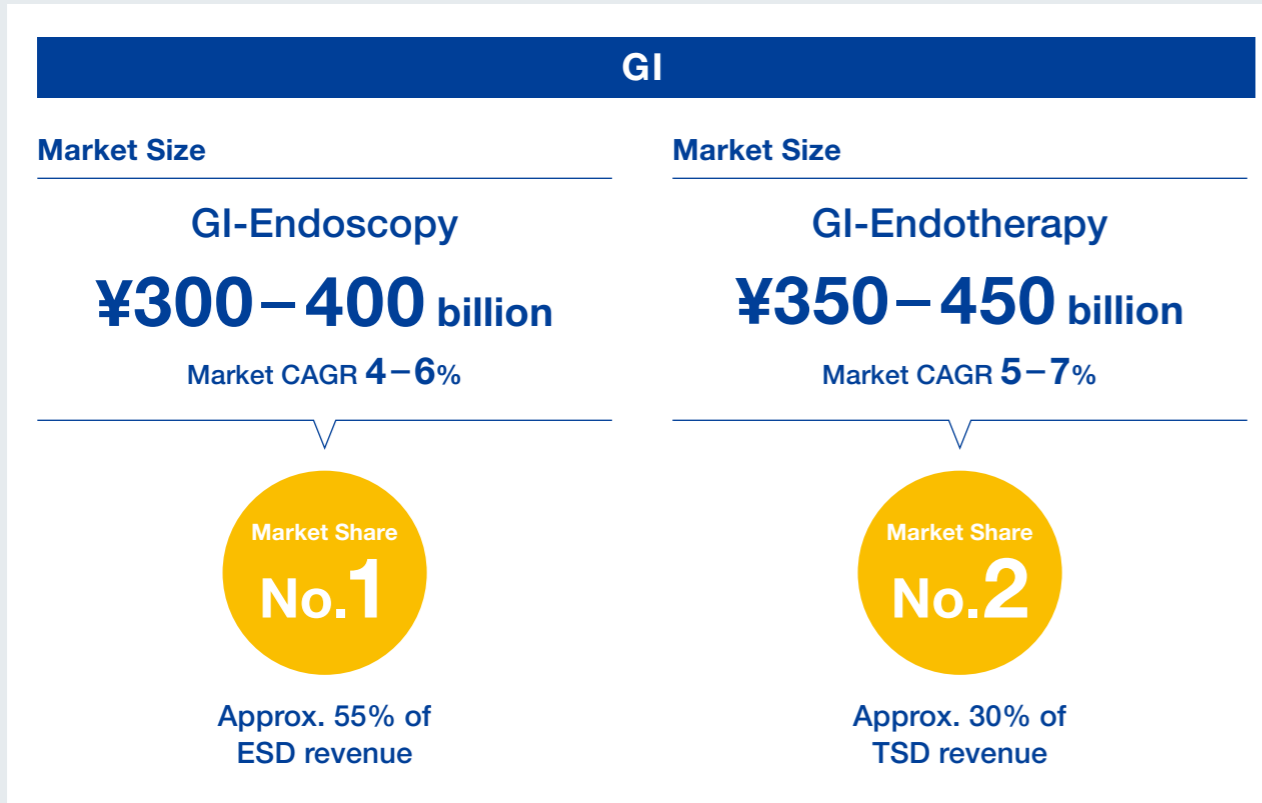


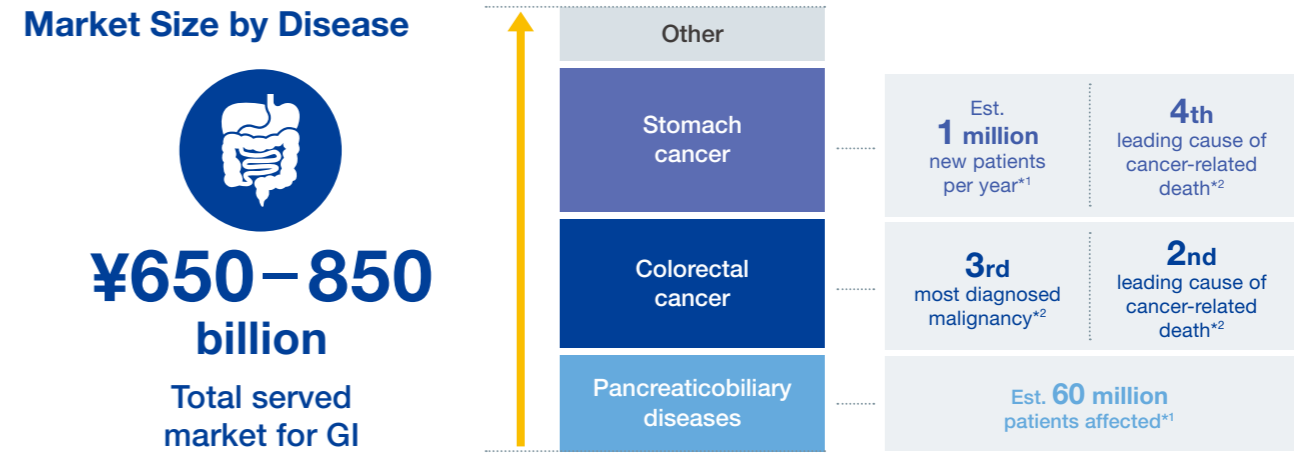
Overview and Direction of Medical Business

# Our Positions in Focus Areas



Note: Served market scale and growth forecast information for this page come from the Company's research and pertains to data for the U.S., EU5 (Germany, UK, Italy, France, Spain), Japan and China. Market scale is as of March 31, 2023. Growth forecasts are projected for fiscal year 2023 to fiscal year 2026. This also applies to market data shown on other pages. Sub-segment sales ratios within ESD/TSD are figures of fiscal year 2023.

# GI



**GI Endoscopy**

Market Size: **¥300–400 billion**<sup>3</sup>, 4–6% CAGR

**Olympus Care Focus**

- Colorectal Cancer
- Gastric Cancer

**Main Sources of Revenue**

GI Endoscopy **EVIS X1** endoscopy system (incl. scopes)

**Catalyst for Growth**

Global expansion and additional line-up for EVIS X1 endoscopy system

**Future Growth Driver**

Computer-Aided Detection (CADe/x) Workflow Management Remote Maintenance

**Olympus Right to Win**

CAGR FY2024-FY2026: Mid single-digit %

- >70% share<sup>3</sup> in colonoscopes, gastroscopes, duodenoscopes, and ultrasound gastrointestinal videoscope
- Strong growth for EVIS X1 endoscopy system with U.S. (FY2024) and China (FY2025) with ~70,000 legacy units potential for upgrades
- Differentiated digital solutions and flexible service models will enhance the standard of care and provide future monetization opportunities

Investments in AI and other digital health solutions will provide continued differentiation, improve patient outcomes and workflow management

**GI-Endotherapy**

Market Size: **¥350–450 billion**<sup>3</sup>, 5–7% CAGR

**Olympus Care Focus**

- Colorectal Cancer
- Hepato-pancreato-biliary Disease
- Gastric Disease

**Main Sources of Revenue**

ERCP, ESD, Hemostasis and Sampling devices

**Catalyst for Growth**

ESD Knives

**Future Growth Driver**

EndoClot, Metal stents, Single-use cholangioscope (To be unveiled)

**Olympus Right to Win**

CAGR FY2024-FY2026: High single-digit %

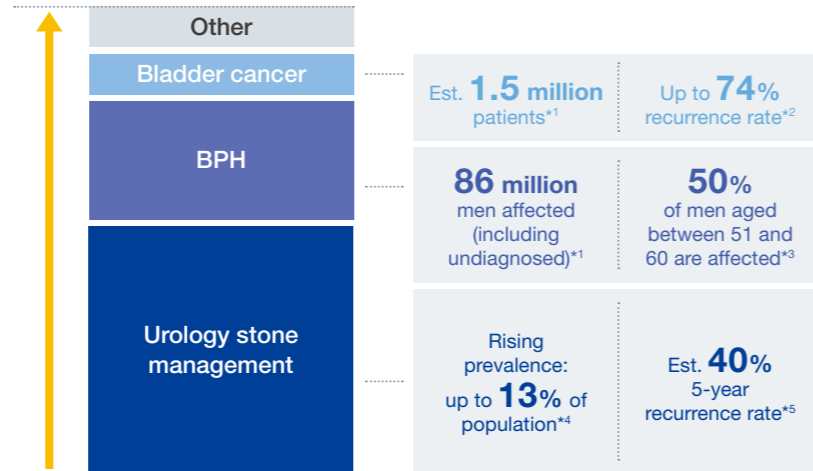
- ~20% global share<sup>3</sup> with double-digit growth in our ESD/EMR, ENDOCUFF VISION, EndoClot portfolios
- Acquisition<sup>4</sup> of broad metal stent portfolio will significantly accelerate our global position and options in biliary tract, esophagus, colon, and duodenum treatments
- Single-use cholangioscope will enhance clinician optionality

Continued market adoption of new product launches plus the recently announced acquisition<sup>4</sup> of metal stent portfolio will drive high-single digit growth

<sup>1</sup> Source: Epi Database®, Cerner Enviza. Available from wee.epidb.com. Accessed July 11, 2023. 2020 data for U.S., EU5, Japan, and China.  
<sup>2</sup> Source: GLOBOCAN 2020  
<sup>3</sup> Addressable market, growth and Olympus position based upon publicly available data and Olympus research, and pertains to data for the U.S., Germany, UK, Italy, France, Spain, Japan and China.  
<sup>4</sup> Acquisition of Taewoong medical Co., Ltd.; Closure pending  
 Note: Products or devices presented include future technology which may be pending regional regulatory approval and are not available for sale in all regions.

# Urology

## Market Size by Disease



### Upper Tract

**Olympus Care Focus**  
Upper tract (Kidney, Ureter, & Bladder)  
• Stone Management

Market Size **¥240 – 300 billion**\*<sup>6</sup>  
5-7% CAGR\*<sup>7</sup>

**Main Sources of Revenue**  
Ureteroscopes & legacy lithotripsy system fibers

**Catalyst for Growth**  
TFL lithotripsy fibers  
Soltive SuperPulsed Laser System

**Future Growth Driver**  
Single-use ureteroscope  
**To be unveiled**

**Olympus Right to Win**  
CAGR FY2024-FY2026\*<sup>8</sup>: High single-digit %

- #1 in reusable ureteroscopes — launch of single-use ureteroscope will expand clinician options
- Portfolio of Laser and Ultrasonic lithotripsy systems enables share capture
- #1 in Thulium Fiber Laser lithotripsy systems (Soltive SuperPulsed Laser System) and fibers

✓ Portfolio expansion in our Soltive platform and the launch of a single-use ureteroscope will provide sustainable long-term growth

### Lower Tract

**Olympus Care Focus**  
Lower tract (Bladder & Prostate)  
• Benign Prostate Hyperplasia  
• Bladder Cancer

Market Size **¥160 – 200 billion**\*<sup>6</sup>  
5-7% CAGR\*<sup>7</sup>

**Main Sources of Revenue**  
Bipolar resection electrodes  
Cystoscopy

**Catalyst for Growth**  
PLASMA+ resection generator and PLASMA+ consumables

**Future Growth Driver**  
iTind — Minimally Invasive BPH device >150K procedure market growing at 18% CAGR

**Olympus Right to Win**  
CAGR FY2024-FY2026\*<sup>8</sup>: High single-digit %

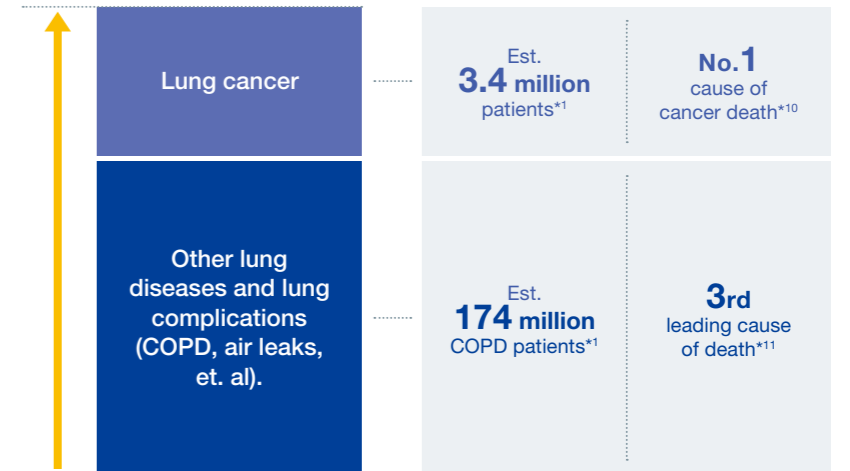
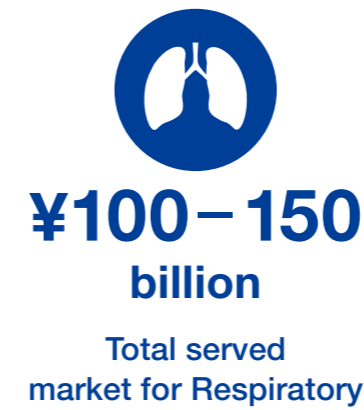
- Existing market leading position in cystoscopes, resectoscopes, and resection electrodes
- PLASMA+ system designed to shorter procedure times
- Expanded reimbursement for differentiated MIS BPH device which provides better clinical outcomes and elevates the standard of care\*<sup>9</sup>

Note: Refer to the following study on iTind: Chughtai et al., 2020; Amparore et al., 2021; De Nunzio et al., 2021. Implantation of the iTind device may cause pelvic discomfort, blood in urine, painful or urgent urination. In rare cases, the iTind device may cause urinary tract infection or a sudden difficulty to urinate.

✓ Market leading PLASMA+ resection system plus new minimally invasive BPH device will deliver consistent growth

# Respiratory

## Market Size by Disease



**Olympus Care Focus**  
• Lung Cancer  
• Benign Pulmonary Disease (COPD)

Market Size **¥100 – 150 billion**\*<sup>6</sup>  
6-7% CAGR

**Main Sources of Revenue**  
EBUS bronchoscope  
EVIS X1 endoscopy system targets installed base of 15K platforms

**Catalyst for Growth**  
EBUS-TBNA\*<sup>12</sup> needles  
Single-use airway management scopes

**Future Growth Driver**  
Slim EBUS scope  
**To be unveiled**

**Olympus Right to Win**  
CAGR FY2024-FY2026\*<sup>8</sup>: Mid single-digit %

- Leading market position of >70% share\*<sup>6</sup> in pulmonary bronchoscopes, endotherapy, EBUS scopes and EBUS-TBNA needles
- Slim EBUS will enable access to suspicious lesions beyond the central / middle lung regions

✓ EVIS X1 platform upgrades and extension of EBUS portfolio which will expand clinical applications thereby driving sustainable growth for the next few years

\*1 Source: Epi Database®, Cerner Enviza. Available from [www.epidb.com](http://www.epidb.com). Accessed July 11, 2023. 2020 data for U.S., EU5, Japan, and China.  
 \*2 Source: Recurrence of high-risk bladder cancer: A population-based analysis—Cancer. 2013 Sep 1; 119(17): 3219-3227.  
 \*3 Source: BPH: surgical management—Urology Care Foundation website. [www.urologyhealth.org](http://www.urologyhealth.org). Updated July 2013.  
 \*4 Source: Epidemiology of stone disease across the world—World J Urol. 2017 Sep;35(9):1301-1320. doi: 10.1007/s00345-017-2008-6.  
 \*5 Source: Recurrent Nephrolithiasis in Adults: A Comparative Effectiveness Review of Preventive Medical Strategies—Agency for Healthcare Research and Quality ([www.effectivehealthcare.ahrq.gov](http://www.effectivehealthcare.ahrq.gov)), published online June 15, 2011.  
 \*6 Addressable market, growth and Olympus' position based upon publicly available data and Olympus research, and pertains to data for the U.S., Germany, UK, Italy, France, Spain, Japan and China.  
 \*7 CAGR for the total market of upper and lower tract categories.  
 \*8 Urology (including gynecology products) of Olympus' Therapeutic Solutions Business  
 \*9 iTind procedure does not require a permanent implant and preserves sexual function and continence, while reducing the need for a post procedure catheter. Procedure can be done in the MD office setting.  
 \*10 Source: GLOBOCAN 2020  
 \*11 Source: World Health Organization  
 \*12 Endobronchial ultrasound-guided transbronchial fine needle aspiration (EBUS-TBNA).  
 Note: Products or devices presented include future technology which may be pending regional regulatory approval and are not available for sale in all regions.