

Medical Business Direction

Chronic diseases including cancer continue to increase in aging population

2020
2040

19 million people
 ➤
30 million people

Estimated increase in new cancer cases*

Changes due to new technologies such as digital technologies

Potential to reduce physician burdens and costs

*Source: GLOBOCAN 2020



Medical Business Direction (Announced in December 2021)

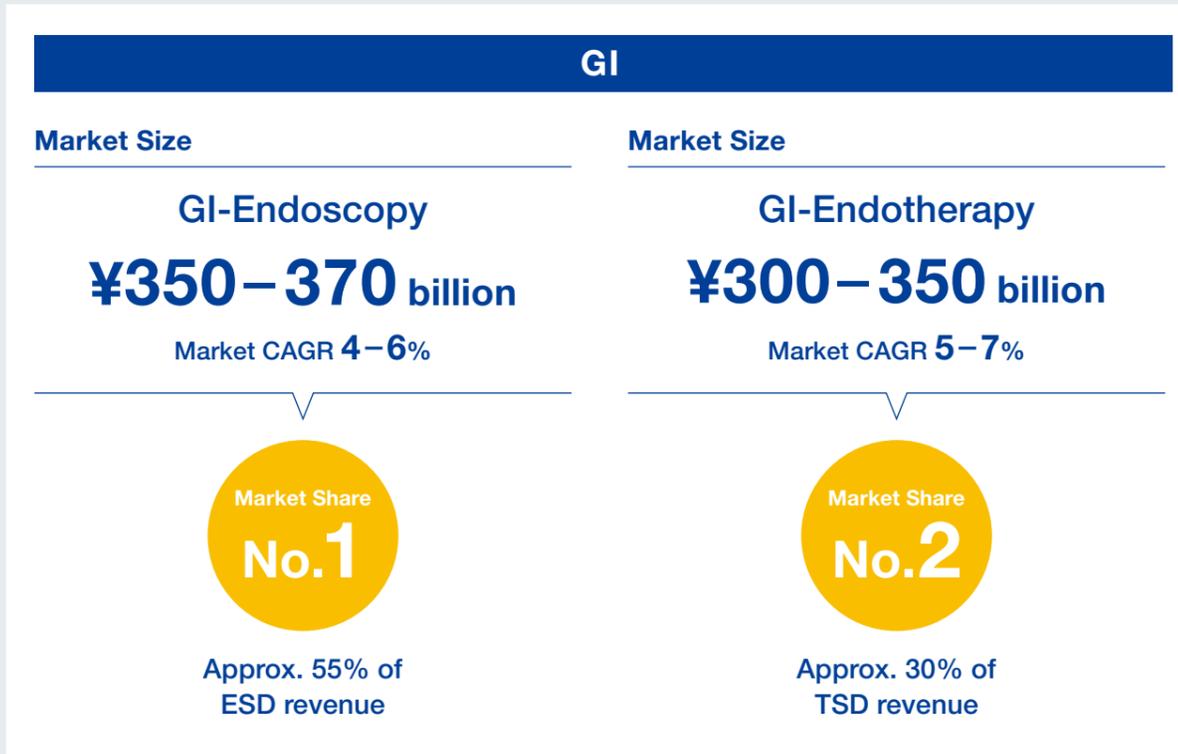
Based on the long-term corporate strategy, Olympus aims to become a global medtech company. To this end, Olympus announced a clear direction for its Medical Business.

	<h3>Focus</h3>	<p>Focus on GI-Endotherapy, Urology, and Respiratory business areas, the disease states on which Olympus can maximize its positive impact.</p>
	<h3>Shape</h3>	<p>Shape the future by investing in new ways to enhance the standard of care.</p> <ul style="list-style-type: none"> ● Introduce single-use endoscopes; integrate computer-aided diagnosis, cloud, and endoscopy workflow management technologies; and explore endoluminal therapy breakthroughs
	<h3>Enable</h3>	<p>Enable Olympus to better execute globally and at pace.</p> <ul style="list-style-type: none"> ● Enable an expanded global R&D network, a stronger Medical and Scientific Affairs, a more centralized quality assurance and regulatory affairs (QARA) function, and an established corporate venture capital fund



Aim to improve patient outcomes by elevating the standard of care in targeted disease states.

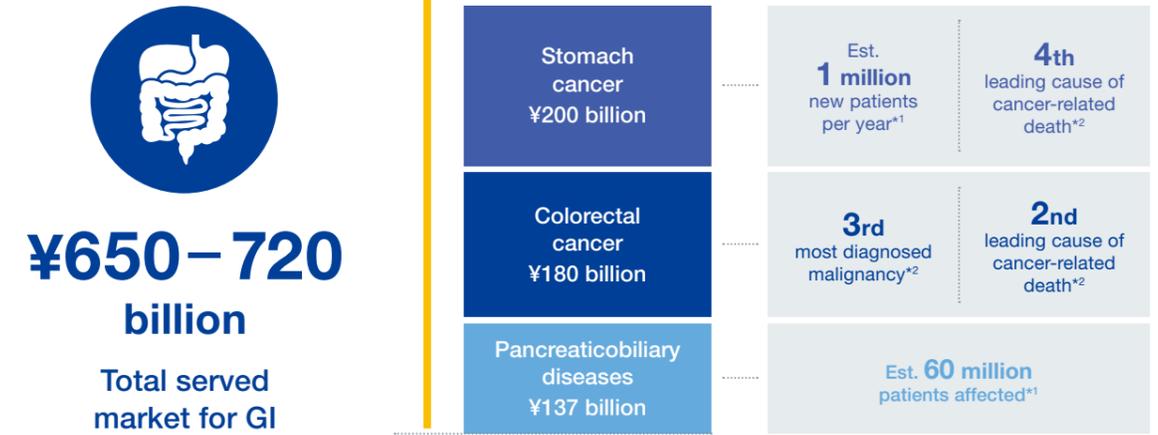
Our Positions in Focus Areas



Note: Served market scale and growth forecast information for this page come from the Company's research and pertains to data for the USA, EU5 (Germany, UK, Italy, France, Spain), Japan and China. Market scale is as of March 31, 2021. Respiratory includes the impact of the Veran Medical acquisition. Growth forecasts are projected for fiscal year 2022 to fiscal year 2024, starting from fiscal year 2021. This also applies to market data shown on other pages. Sub-segment sales ratios within ESD/TSD are figures of fiscal year 2022.

GI

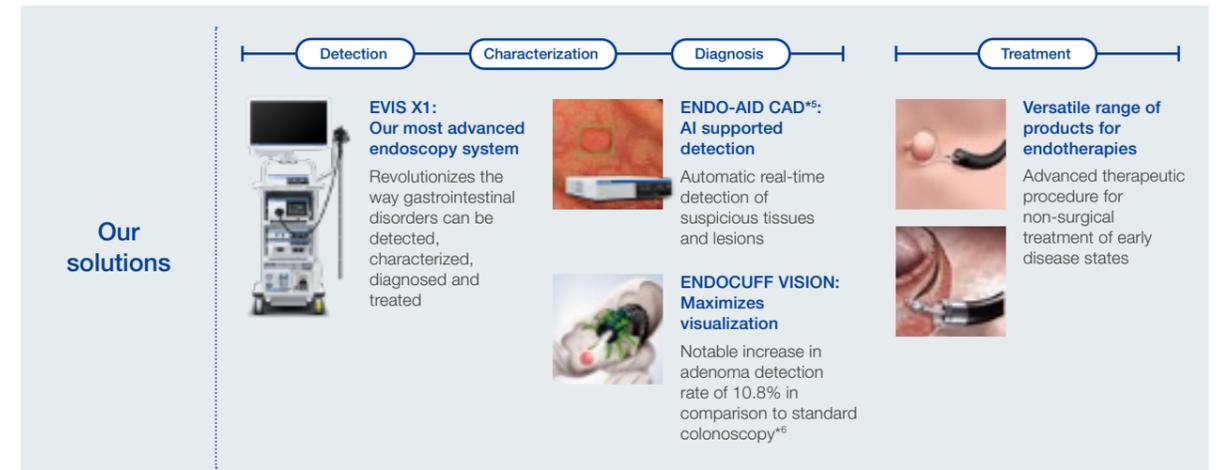
Market Size by Disease



Major Care Pathways

Our focus | Screening, diagnosis, and treatment in early stages to limit severe cases

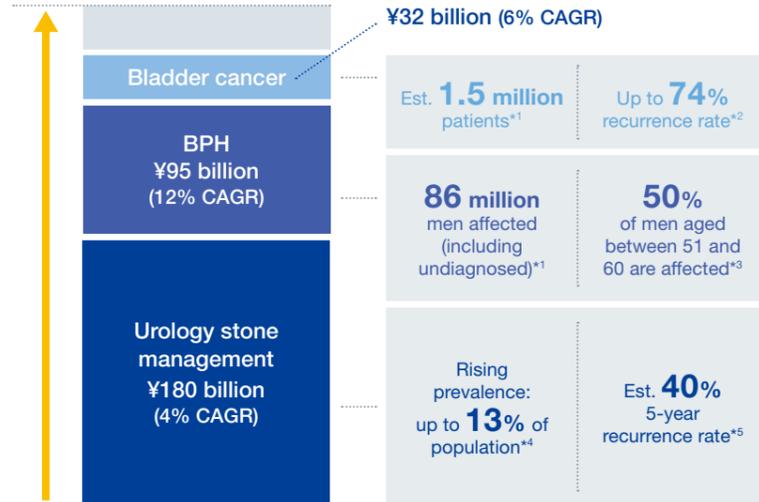
The disease state | Colorectal cancer (CRC) is the third most diagnosed malignancy and the second leading cause of cancer-related deaths in the world*². Its burden is expected to increase by 60%, to more than 2.2 million new cases and 1.1 million deaths, by 2030*³. Currently, 50 million colonoscopies are performed worldwide*⁴.



*¹ Source: Epi Database®, Cerner Enviza. Available from wee.epidb.com. Accessed November 18, 2021. 2020 data for U.S., EU5, Japan, and China.
*² Source: GLOBOCAN 2020
*³ <https://gut.bmj.com>, Global patterns and trends in colorectal cancer incidence and mortality, Melina Arnold, Mónica S Sierra, Mathieu Laversanne, Isabelle Soerjomataram, Ahmedin Jemal, Freddie Bray
*⁴ Based on Company's research. Numbers for U.S., Canada, EU5, Japan, China, South Korea, Australia, India as of 2018 or 2019 depending on region
*⁵ Computer-aided detection
*⁶ Floer M, Biecker E, Fitzlaff R, et al. Higher Adenoma Detection Rates with Endocuff-Assisted Colonoscopy—A Randomized Controlled Multicenter Trial. PLoS ONE. 2014;9(12):e114267
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

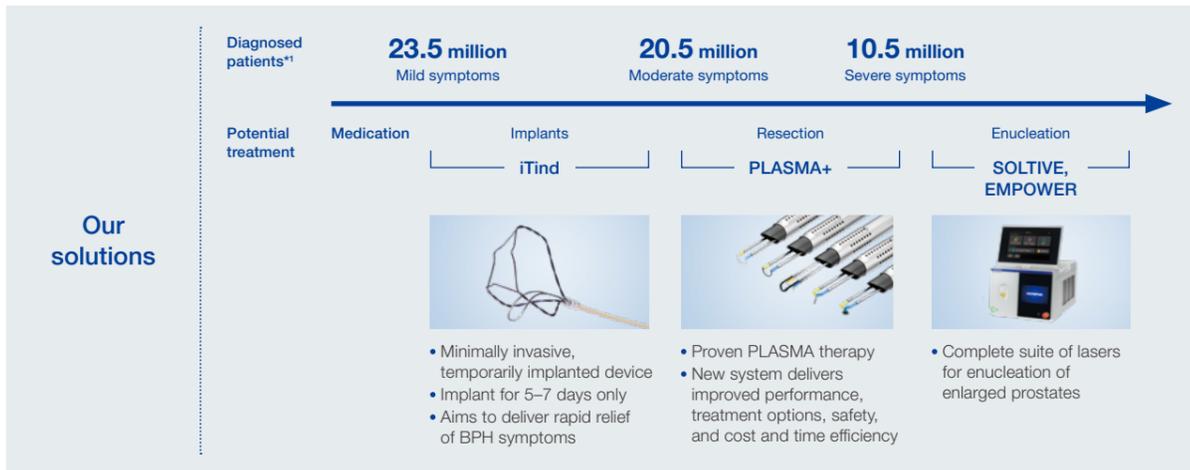
Market Size by Disease



Major Care Pathways

Our focus Provide urologists a complete suite of procedural solutions to treat all patients

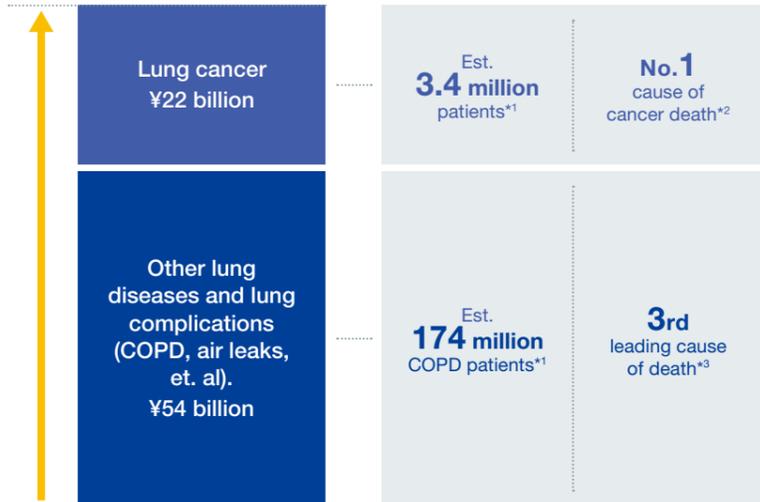
The disease state BPH is a widespread disease. Symptoms start mildly, but typically develop further over time, requiring different types of therapies in line with severity.



^{*1} Source: Epi Database®, Cerner Enviza. Available from wee.epidb.com. Accessed November 18, 2021. 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. 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), published online June 15, 2011.
 Note: Products or devices presented include future technology which may be pending regional regulatory approval and are not available for sale in all regions.

Respiratory

Market Size by Disease



Major Care Pathways

Our focus Drive improvements in the five-year survival rate of lung cancer patients by developing new and disruptive technologies

The disease state Lung cancer has the highest mortality of any type of cancer^{*2}. Only small percentage of patients are screened today. Utilization of EBUS-TBNA^{*4}, a guideline recommended diagnostic and staging tool remains low. Maximizing diagnostic yield of suspicious peripheral nodules while minimizing complications remains a critical need.



^{*1} Source: Epi Database®, Cerner Enviza. Available from wee.epidb.com. Accessed November 18, 2021. 2020 data for U.S., EU5, Japan, and China.
^{*2} Source: GLOBOCAN 2020
^{*3} Source: World Health Organization
^{*4} Endobronchial ultrasound-transbronchial needle aspiration
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