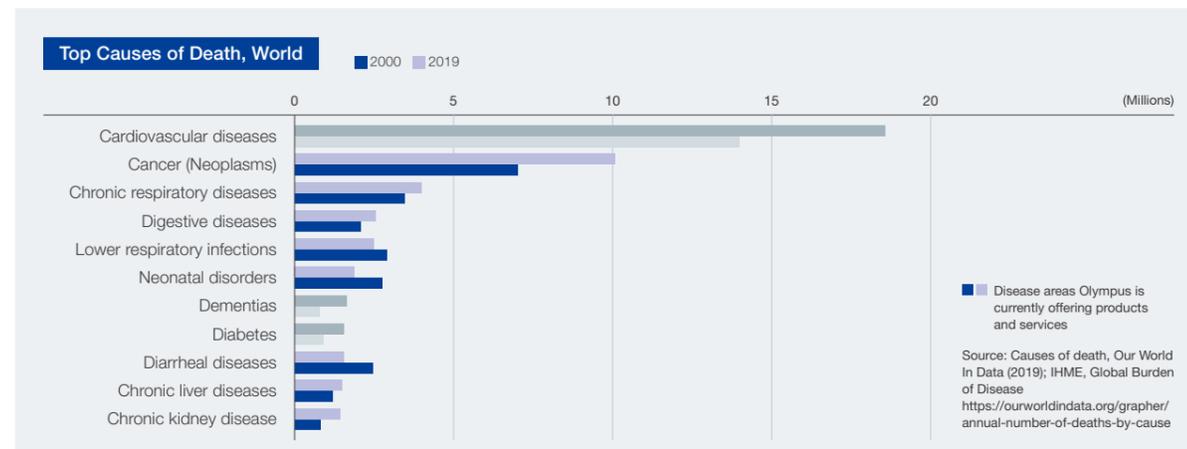


# Global Healthcare Data

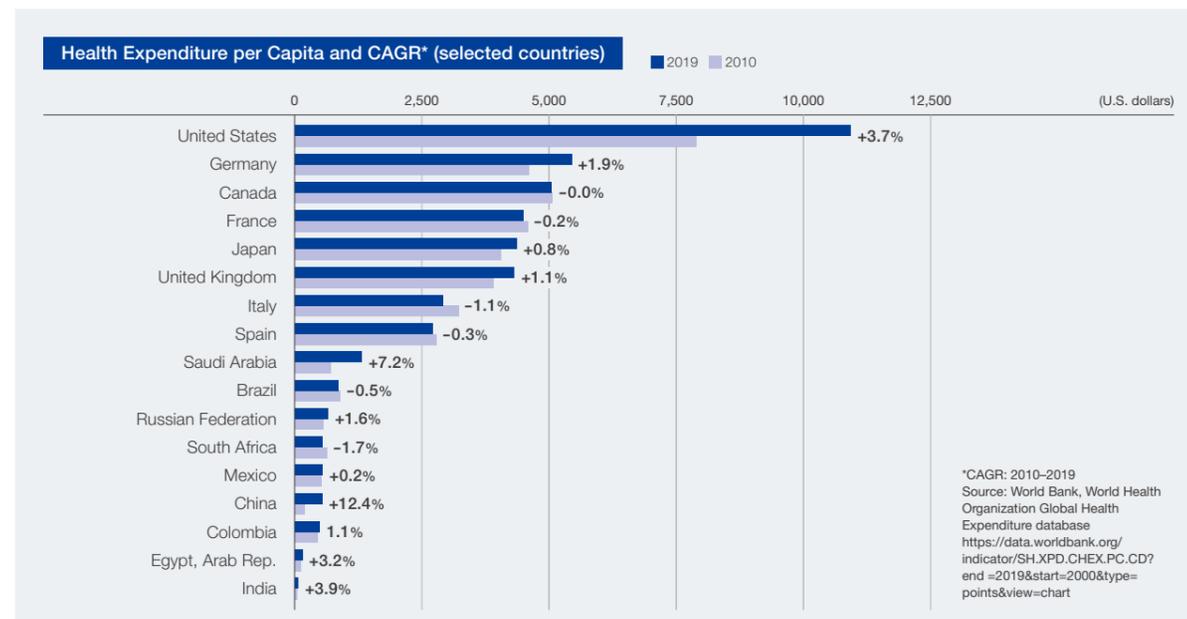
## Diseases

- Cancer is one of the leading causes of death in the world with the fastest rate of increase (+44%) from 2000 to 2019.
- Olympus continues to provide solutions to improve patient outcomes in many of the disease areas.



## Health Expenditure

- The U.S. healthcare expenditure per capita is by far the largest and growing at the compound annual growth rate (CAGR) of 3.7% from 2010 to 2019. The health spending per capita in China has been growing significantly with more than 12% CAGR.
- Olympus is contributing to improve healthcare access globally through supporting healthcare professionals training etc.

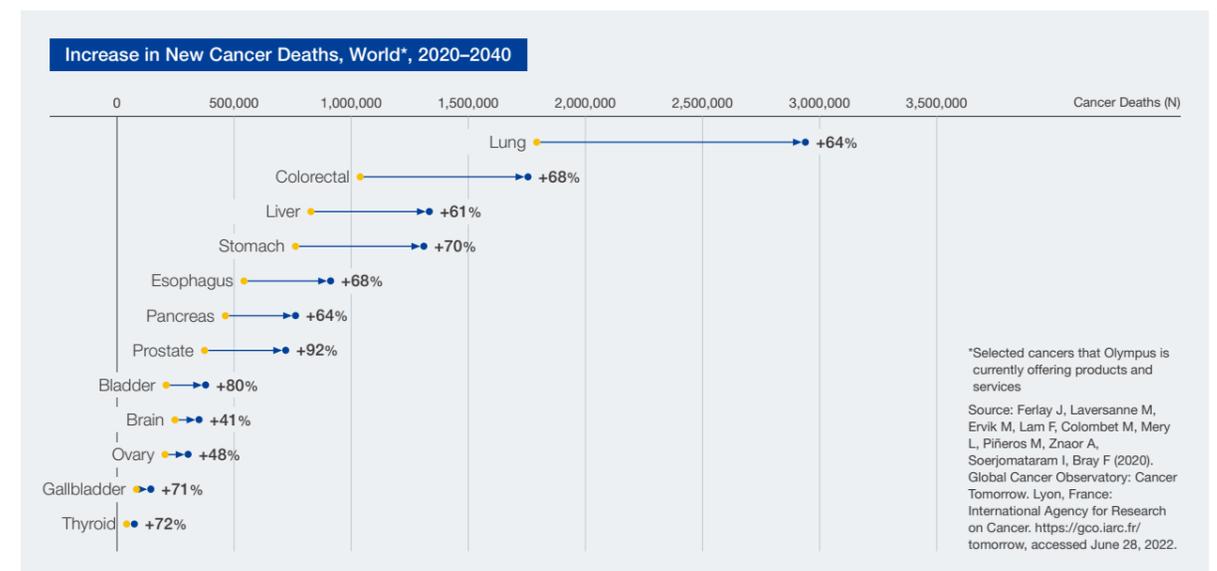


## Cancer

- Lung, Colorectal, Prostate, Stomach, and Liver cancers will remain the Top 5 by volume addressable cancers over the long term with significant growth in absolute incidence. Stomach cancer is projected to be the fastest growing and followed by cancers of the Esophagus, Pancreas and Bladder.
- The overall opportunity to improve the standard of care and patient outcomes will continue to grow significantly across Olympus-addressable cancers.

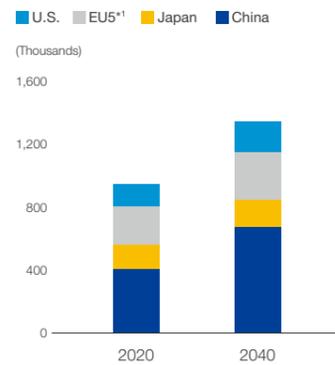


- Lung, Colorectal, Liver, Stomach, and Esophageal cancers will remain the Top 5 by volume addressable cancer deaths over the long term. Deaths from Prostate and Bladder cancers are projected to be the fastest growing with 92% and 80% increase respectively, from 2020 to 2040.



GI

**Colorectal Cancer Incidence by Selected Countries**



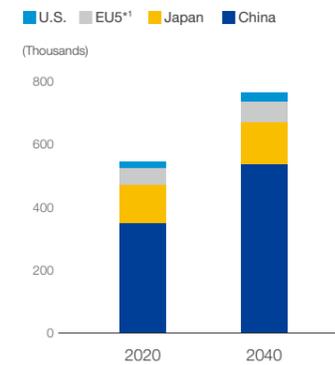
- Colorectal cancer (CRC) is one of the top commonly diagnosed malignancy types. Its burden is expected to increase with the risk factors including family and hereditary history but most cases are sporadic (increasing with age).
- CRC has a long history of natural progression demonstrated. Olympus, a leader in flexible endoscopy, is committed to its part in the fight against CRC with the mission to raise awareness and ensure early detection.

**Colonoscopy**

Total Cumulative Growth in the U.S. (2009-2019)<sup>12</sup>

**+22%**

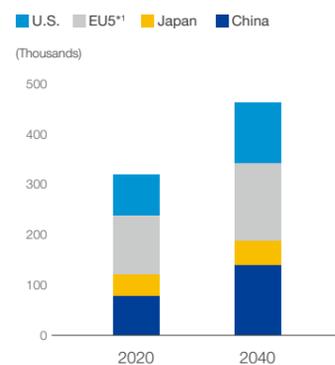
**Gastric Cancer Patients— Incidence by Region**



- Gastric cancer remains one of the most common and deadly cancers worldwide, especially among older males. China is a country with a large population of affected patients.
- Gastric cancer incidence and mortality are highly variable by region and highly dependent on diet and Helicobacter pylori infection.
- Olympus, a leader in flexible endoscopy, manufactures gastroscopes for the diagnosis and treatments of gastric cancers. When gastric cancer is detected in its early stages, endoscopic resection is a common approach of treatment with shorter hospital stay and faster return to normal life than conventional open surgery.

Urology

**Bladder Cancer Patients— Incidence by Selected Countries**



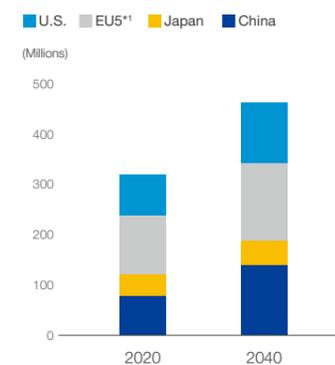
- Bladder cancer is one of the common cancers worldwide. With its high prevalence, in conjunction with its vulnerability to multiple recurrences and progression despite local therapy, leads to a substantial health service burden globally.
- Olympus is focused around decreasing bladder cancer recurrence through improved detection and resection of non-muscle invasive tumors and enhancing health outcomes and patient experiences.

**Cystoscopy**

Total Cumulative Growth in the U.S. (2009-2019)<sup>12</sup>

**+10%**

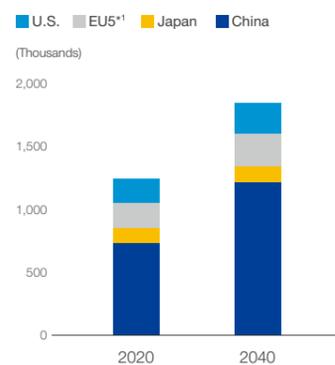
**BPH—Diagnosed Prevalence by Selected Countries**



- Benign Prostatic Hyperplasia (BPH) affects 50% of men aged 51–60 years of age (including undiagnosed)<sup>13</sup>. Symptoms often start mildly, but typically develop further over time and require different types of therapies in line with severity. The majority of BPH patients are Mild (43%) or Moderate (38%) while 19% are Severe.
- For years Olympus has been an innovator in developing and marketing procedural solutions for BPH, with electrodes for resection, vaporization and enucleation. By providing new therapeutic solutions with the iTind device, Olympus will continue to be a global market leader in Urology.

Respiratory

**Non-Small Cell Lung Cancer (NSCLC) Patients— Incidence by Selected Countries**



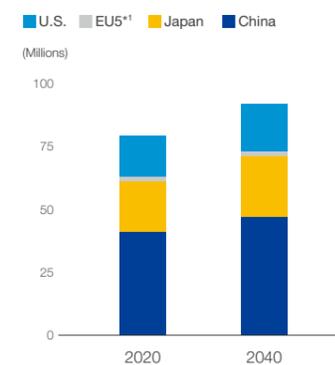
- Lung cancer is by far the leading cause of cancer death. Non-Small Cell Lung cancer (NSCLC) represents 85% of lung cancer types, 15% being Small Cell Lung cancer (SCLC). The burden of NSCLC is expected to increase to nearly 1.5 times in new cases by 2040 from 2020 (U.S., EU5, Japan, China). The highest incidence with fastest evolution can be found in China. Main risk factors are cigarette smoking, secondhand smoke, and exposure to harmful chemicals.
- Olympus' mission is to improve outcomes for patients with, or at risk of, having lung cancer by elevating the standard of care across diagnosis and staging.
- Olympus contributes to the advancements in thoracic imaging through the increased detection of small solitary pulmonary nodules (SPNs)

**Bronchoscopy**

Total Cumulative Growth in the U.S. (2009-2019)<sup>12</sup>

**+63%**

**COPD Patients— Diagnosed Prevalence by Selected Countries**



- Chronic Obstructive Pulmonary Disease (COPD) entails a group of lung conditions that cause breathing difficulties. It is the 3rd leading cause of death worldwide. Environmental exposure to tobacco smoke, air pollution and occupational dusts, fumes and chemicals are important risk factors for COPD.
- COPD is sometimes called emphysema or chronic bronchitis. Diagnosed prevalence of COPD patients is forecasted to increase from approx. 75 million in 2020 to more than 90 million in 2040 (U.S., EU5, Japan, China). China is the highest and fastest increasing diagnosed prevalence of COPD patient population.
- Olympus endobronchial valve Spiration Valve System (SVS) is used for emphysema patients when medicines have no effect or in which neither a lung reduction procedure nor transplant surgery is not applicable. It is also used to treat postoperative prolonged air leaks arising from a pneumothorax or lung surgery.

\*1 EU5: UK, France, Italy, Germany, Spain  
Source: Epi Database, Cerner Enviza. Accessed June 2022.

\*2 Source: Compiled from Merative MarketScan Outpatient View database released in 2011 and 2021. MarketScan is a registered trademark of Merative in the United States, other countries or both.

\*3 Source: BPH: surgical management – Urology Care Foundation website: www.urologyhealth.org. Updated July 2013