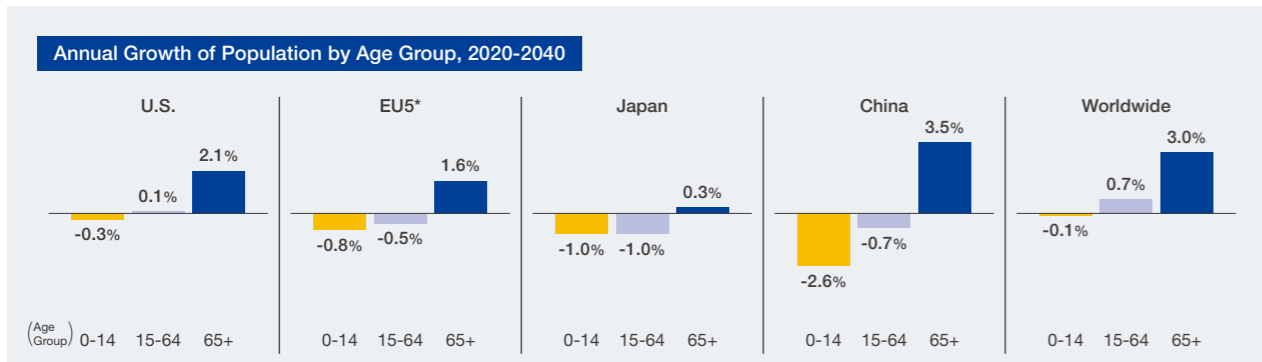


Global Healthcare Data

Global Healthcare Data

Population

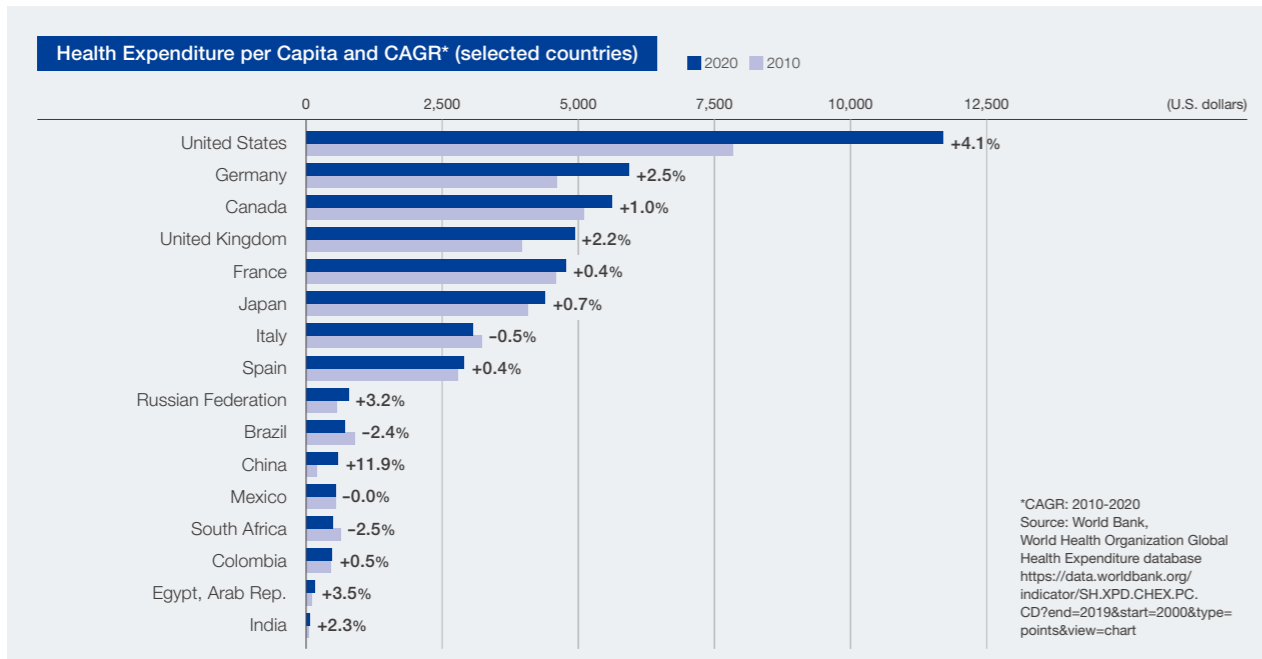
- Aging population is a critical trend across major regions and worldwide as the 65+ segment grows by 3% annually and 0-14 will experience no growth.
- China will see the most rapidly growing aging population and declining number of young people due to the increasing longevity and dropping birthrate.
- Aging population is one of the primary factors of increased disease burden and Olympus continues providing solutions to improve the standard of care in targeted disease states.



Source: United Nations, Department of Economic and Social Affairs, Population Division (2022). World Population Prospects 2022, custom data acquired via website.
 * EU5: UK, France, Italy, Germany, Spain

Health Expenditure

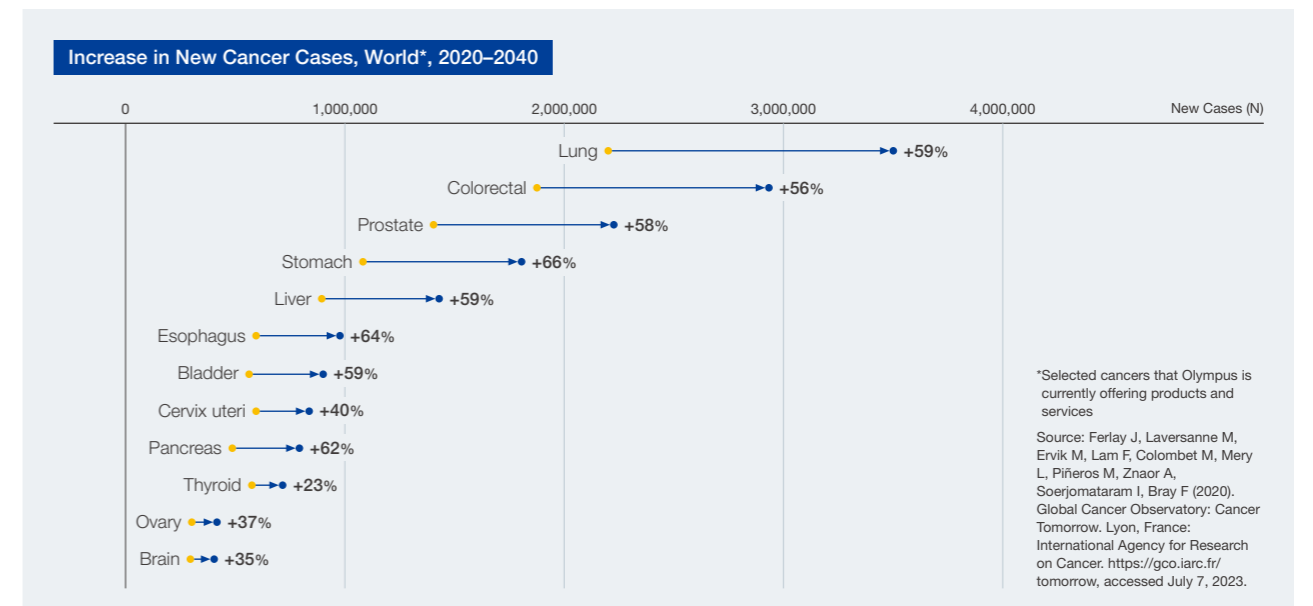
- The U.S. healthcare expenditure per capita is by far the largest and growing at the compound annual growth rate (CAGR) of 4.1% from 2010 to 2020. The health spending per capita in China has been growing significantly with approximately 12% CAGR.
- Olympus is contributing to improve healthcare access globally through supporting healthcare professionals training, etc.



*CAGR: 2010-2020
 Source: World Bank, World Health Organization Global Health Expenditure database
<https://data.worldbank.org/indicator/SH.XPD.CHEX.PC.CD?end=2019&start=2000&type=points&view=chart>

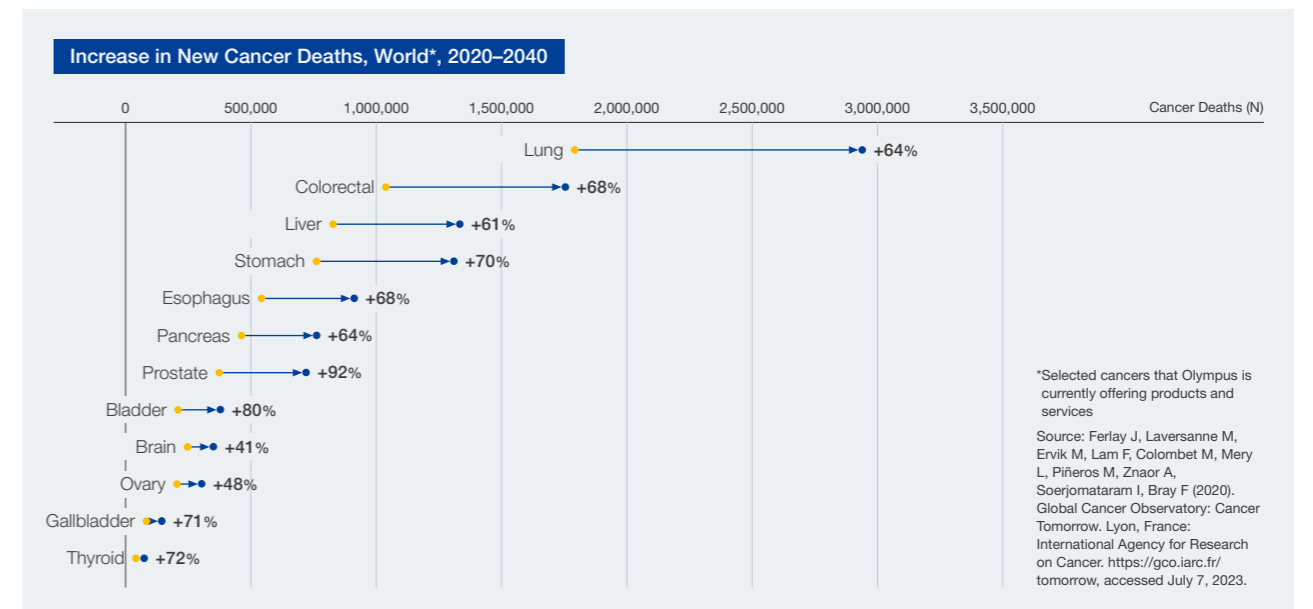
Cancer

- 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.



*Selected cancers that Olympus is currently offering products and services
 Source: Ferlay J, Laversanne M, Ervik M, Lam F, Colombet M, Mery L, Piñeros M, Znaor A, Soerjomataram I, Bray F (2020). Global Cancer Observatory: Cancer Tomorrow. Lyon, France: International Agency for Research on Cancer. <https://gco.iarc.fr/tomorrow>, accessed July 7, 2023.

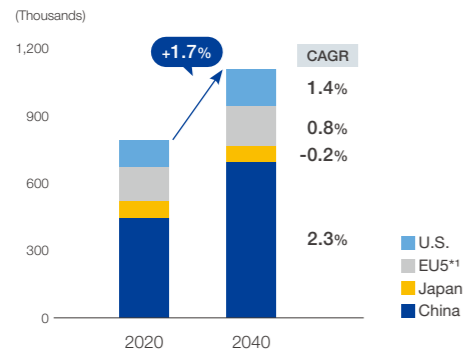
- Lung, Colorectal, Liver, Stomach, and Esophageal cancers will remain the Top 5 by volume addressable cancer deaths over the long term. Deaths from Prostate and Bladder cancers are projected to be the fastest growing with 92% and 80% increase respectively, from 2020 to 2040.



*Selected cancers that Olympus is currently offering products and services
 Source: Ferlay J, Laversanne M, Ervik M, Lam F, Colombet M, Mery L, Piñeros M, Znaor A, Soerjomataram I, Bray F (2020). Global Cancer Observatory: Cancer Tomorrow. Lyon, France: International Agency for Research on Cancer. <https://gco.iarc.fr/tomorrow>, accessed July 7, 2023.

GI

Colorectal Cancer Patients—Incidence by Selected Countries



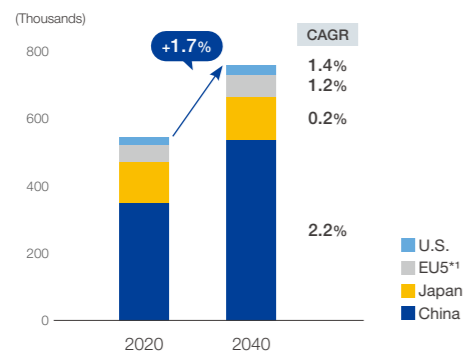
- Colorectal Cancer (CRC) is a primary driver of cancer worldwide, accounting for approximately 10% of all cancer cases and is the second leading cause of cancer-related deaths worldwide. Its burden is expected to increase with the risk factors including family and hereditary history but most cases are 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)²

+22%

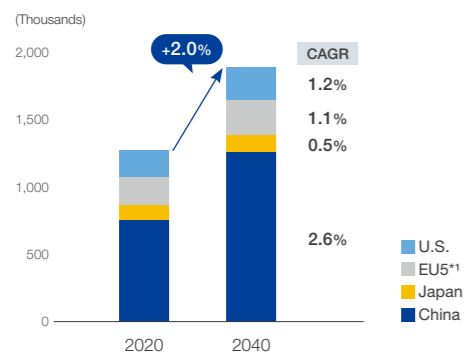
Gastric Cancer Patients—Incidence by Selected Countries



- 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.

Respiratory

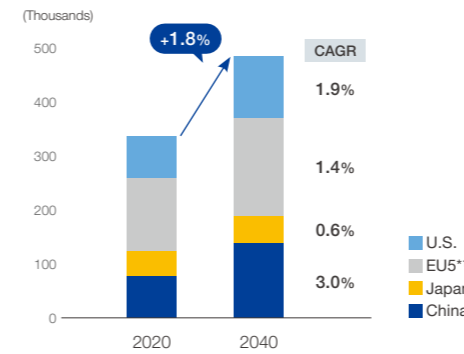
Non-Small Cell Lung Cancer (NSCLC) Patients—Incidence by Selected Countries



- 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.

Urology

Bladder Cancer Patients—Incidence by Selected Countries



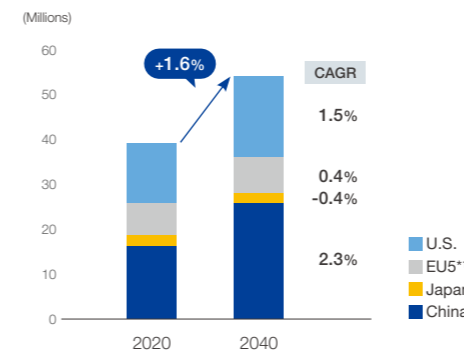
- Bladder cancer is one of the common cancers worldwide. With its high prevalence, in conjunction with its vulnerability to multiple recurrences and progression despite local therapy, leads to a substantial health service burden globally.
- Olympus is focused around decreasing bladder cancer recurrence 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)²

+10%

BPH Patients—Diagnosed Prevalence by Selected Countries



- Benign Prostatic Hyperplasia (BPH) affects 50% of men aged 51–60 years of age (including undiagnosed)³. 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.

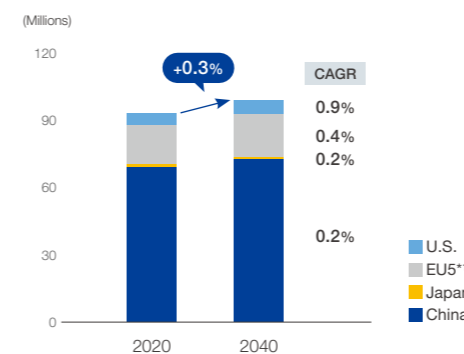
TURP

(Trans urethral resection of the prostate)

Total Cumulative Growth in the U.S. (2013-2023)^{2,4}

+28%

Kidney Stone Patients—12 Month Total Prevalence by Selected Countries



- Currently 12% of the global population are affected by kidney stones with prevalence rates rising globally, particularly in China, U.S. and EU5 countries⁵. The disease has been associated with an increased risk of end-stage renal failure.
- Olympus has a long history of supporting healthcare professionals to meet the needs of patients and customers in stone management with expertise in Visualization and Lithotripsy. “See and Treat” is core to the patient outcomes of safely rendering a patient stone free. Olympus is working to shape and increase procedural efficacy and efficiency through an Integrated Stone Management platform combining breakthrough laser technologies with endoscopy technologies through digital health offerings.
- Olympus is constantly redefining total procedural solutions that enable healthcare professionals to improve clinical outcomes and patient safety. As a result, Olympus is the trusted partner for urological needs and will continue to innovate to stay on the cutting edge in stone management technology.

*1 EU5: UK, France, Italy, Germany, Spain
Source: Epi Database, Cerner Enviza. Accessed July 2023

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

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

*4 Source: Definitive Healthcare database

*5 Source: https://www.ncbi.nlm.nih.gov/pmc/articles/PMC5817324/