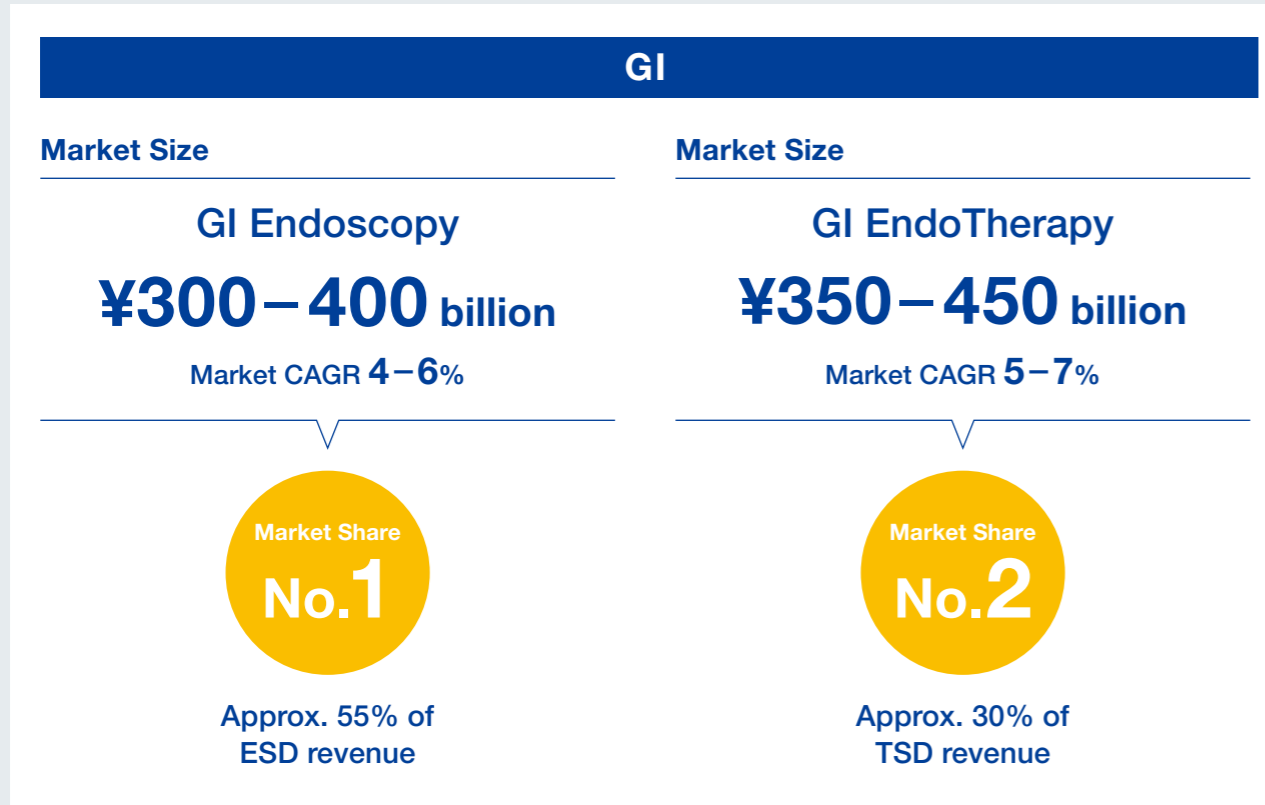


Overview and Direction of Three Focus Areas

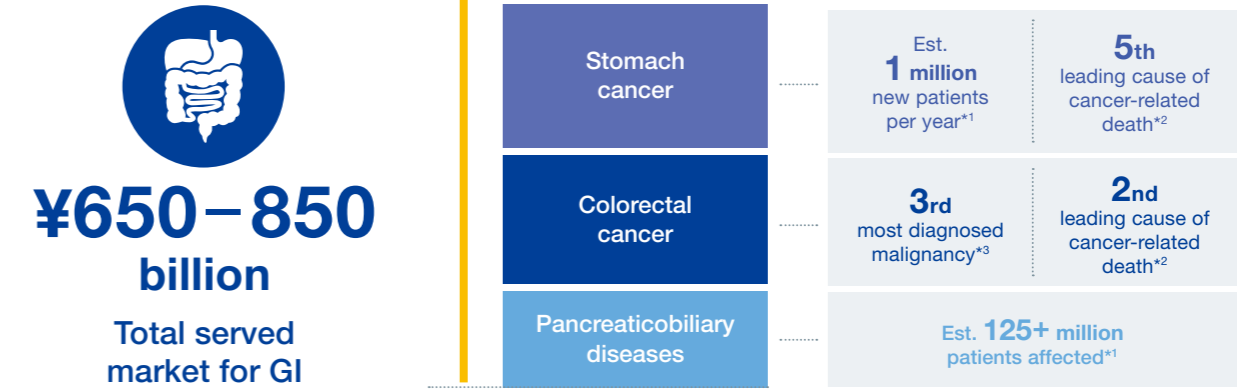
# Our Positions in Focus Areas



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, the U.K., Italy, France, Spain), Japan, and China. Market scale is as of July 31, 2024. Growth forecasts are projected for fiscal year 2024 to fiscal year 2027. This also applies to market data shown on other pages. Sub-segment sales ratios within ESD/TSD are figures of fiscal year 2024.

## GI

### Market Size by Disease



### GI Endoscopy



### GI EndoTherapy



\*1 Source: Epi Database®, Cerner Enviza, as accessed on July 2024; this is 2023 data for the U.S., EU5, Japan, and China.

\*2 Source: GLOBOCAN 2022

\*3 Source: GLOBOCAN 2020

\*4 Addressable market, growth, and Olympus position based upon publicly available data and Olympus research, and pertains to data for the U.S., Germany, the U.K., Italy, France, Spain, Japan, and China

\*5 Addressable reusable scope Olympus position based upon publicly available data and Olympus research, and pertains to data for the U.S., Germany, the U.K., Italy, France, Spain, Japan, and China

\*6 Units sales of previous generation video processor (CV-190 and CV-290)

\*7 Endoscopic Retrograde Cholangio Pancreatography

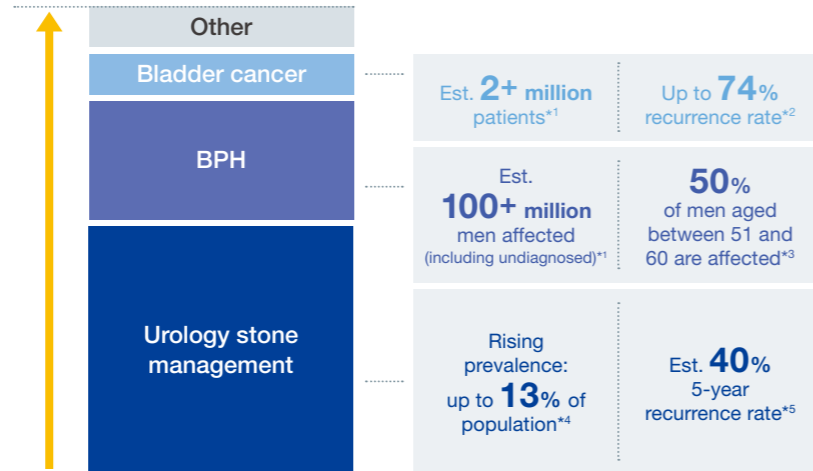
\*8 Endoscopic Submucosal Dissection

\*9 Endoscopic Mucosal Resection

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 **¥260 – 320 billion**\*  
5-7% CAGR

**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

**Olympus Right to Win**  
CAGR FY2024-FY2026\*<sup>7</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 **¥200 – 240 billion**\*  
6-8% CAGR

**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 high-single digit CAGR

**Olympus Right to Win**  
CAGR FY2024-FY2026\*<sup>7</sup>: High single-digit %

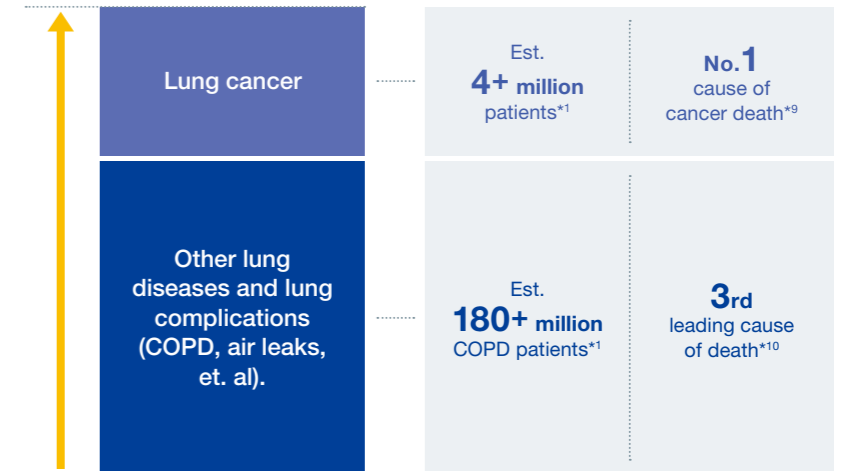
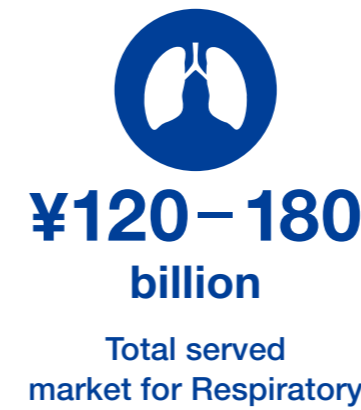
- Existing market leading position in cystoscopes, resectoscopes, and resection electrodes
- PLASMA+ system designed to shorter procedure times
- Expanded reimbursement for differentiated MIS BPH device which provides better clinical outcomes and elevates the standard of care\*<sup>8</sup>

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 **¥120 – 180 billion**\*  
7-8% CAGR

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

**Catalyst for Growth**  
EBUS-TBNA\*<sup>11</sup> needles  
Single-use airway management scopes

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

**Olympus Right to Win**  
CAGR FY2024-FY2026: Mid single-digit %

- Differentiated solutions such as EVIS X1 bronchoscopes and EU-ME3 endoscopic ultrasound processor expected to drive robust future growth
- Committed to delivering meaningful innovation to optimize patient outcomes in bronchoscopy and lung cancer staging & diagnosis procedures

✓ 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, as accessed July 2024; this is 2023 data for the 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.  
 \*6 Addressable market, growth, and Olympus' position based upon publicly available data and Olympus research, and pertains to data for the U.S., Germany, the U.K., Italy, France, Spain, Japan, and China  
 \*7 Urology (including gynecology products) of Olympus' Therapeutic Solutions Business  
 \*8 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.  
 \*9 Source: GLOBOCAN 2022  
 \*10 Source: World Health Organization  
 \*11 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.