All for Healthcare

【Mission】
To help realize a healthy and comfortable life for people around the world

【Business Domain】
Prevention and Treatment of Lifestyle-related Diseases
Three Fields

**Lifestyle-related disease**

- Blood Pressure Monitor
- Blood Glucose Monitor
- Nebulizer
- Thermometer

Respiratory
Wellness

Expand as area strategy

To be expanded as our four global core categories
<table>
<thead>
<tr>
<th>Strength</th>
<th>Sales</th>
<th>Technology</th>
<th>Development / production</th>
</tr>
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<td>• No.1 blood pressure monitor global share</td>
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## OMRON HEALTCARE Our Strengths

<table>
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<th>Strength</th>
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| Sales | • No.1 blood pressure monitor global share  
• Brand building through academic activity  
• Sales network covering 110 nations |
| Technology | • Bio sensing technology  
(sleep monitor & visceral fat monitor) |
| Development / production | • Region-specific product planning capabilities  
• Cost-competitiveness through advanced mass-production technology |
No.1 Blood Pressure Monitor Global Share

<table>
<thead>
<tr>
<th>Year</th>
<th>FY11 Prospect</th>
<th>FY12 Plan</th>
<th>FY13 Target</th>
</tr>
</thead>
<tbody>
<tr>
<td>BPM share (based on sales figures)</td>
<td>50%</td>
<td>52%</td>
<td>54%</td>
</tr>
<tr>
<td>BPM sales volume</td>
<td>13 M units</td>
<td>14 M units</td>
<td>15 M</td>
</tr>
</tbody>
</table>

BPM sales volume: units

Europe
Russia
EMEA (CIS, Eastern Europe, Middle East and Africa)
India
Japan
Asia Pacific (incl. East Asia)
North America
Latin America

Omnron blood pressure monitor sales plan

Size of circles are images of sales volume
Brand Strength in Developed Countries

Global activity focused on medical societies and key opinion leader networks. Considered No.1 brand by pharmacists, doctors, and consumers in the USA.

**Pharmacist**
74% Recommend Omron Products
(Nine times more than our closest rival)

2009 Pharmacy Today Survey

**Doctors**
Brand most recommended by doctors
(Five times more than our closest rival)

2007 Frost & Sullivan Survey

**Consumer**
Top recommendations from the leading consumer magazines in the US

2009 Consumer Reports
Brand-building through Academic Activities

- Symposia
- Exhibition booths
- E-learning materials
Enhancing Brand Awareness in Emerging Markets

Healthcare leading Omron Group brand recognition enhancement effort in India

- Advertising on billboards in Tier 1 & 2 cities
- Mass-media advertisements / sponsorship of India’s 3 major marathons
  - Newspaper Ads
  - Marathon sponsorship
- Free health check event
  - Queues of over 100 people often form
- Acceleration of brand penetration using a celebrity
  - Use of Farhan (famous actor) as brand ambassador
- Use of promotional tools
  - Events carried out over 300 times per year
Expand sales channels of medical equipment for home use.

**FY11** 300,000 stores ⇒ **FY13** 360,000 stores

Expansion mainly in emerging markets
### Planned sales growth by region in FY12

<table>
<thead>
<tr>
<th>Area</th>
<th>Y/Y</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>115%</td>
</tr>
<tr>
<td>Asia Pacific (Excl. India)</td>
<td>125%</td>
</tr>
<tr>
<td>India</td>
<td>175%</td>
</tr>
<tr>
<td>Russia</td>
<td>110%</td>
</tr>
<tr>
<td>Middle East/Eastern Europe</td>
<td>130%</td>
</tr>
<tr>
<td>Latin America</td>
<td>140%</td>
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</table>
Channel Expansion in China

Steady expansion of sales network into new areas despite slowdown of Chinese market

Number of pharmacies selling Omron products

<table>
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<tr>
<th>FY2010</th>
<th>FY2011</th>
<th>FY2012</th>
<th>FY2013</th>
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×1.5 from FY2011 to FY2013
Omron maintained or expanded share of BPM despite unfavorable economic conditions. This trend is expected to continue in 2012.
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| **production**       |                                                                                                                                         |
Bio Sensing Technology (Sleep Monitor)

Place on bed-side to monitor sleep contactlessly. Same kind of technology used for disaster rescue.

<Radio wave sensor>
Senses small movements such as chest movement.

Minimal movement: sleeping
More movement: light sleep or awaked

Period of awareness
Total time of actual sleep
Period of sleep
Bio Sensing Technology

X-ray CT method

- Radiation exposure
- High-skill required
- Expensive equipment

Dual impedance method <DUALSCAN>

New technology World first

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Product Development Suited to Lifestyles in Each Country

In India

1. Measurement not always carried on tables.
2. Lack of storage space
3. Dusty, sandy conditions in many areas

In Brazil

- Measurement carried out on dining table
- Measurement with wrist-type monitors, carried out with wrist below heart
- Cuff positioned over elbow

Product design, functions, and shape suited to typical usage patterns unique to each country
Omron healthcare attained No.1 position in 5 major categories with more appealing products than competitors.

Japanese Market Volume & Share in FY2011

15 sec. measurement thermometer: MC-680

Stylish body composition monitor: HBF-214

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Full automation and easy-to-make design have increased cost competitiveness and profit margins.

- Full automation
- Reduced numbers of parts

Reduced variable costs through categories (30%~60% down) ↓

Cost reduction & increased margins

Manufacturing process 1/2

Design technology

FY13
Lastly

To help realize a healthy and comfortable life for people around the world

VG2020 Vision

“Make health examination/health management more accessible”

Slogan

All for Healthcare INNOVATION
- Value Innovation - - Process Innovation -

Achieve over 100 billion yen in sales in FY2020