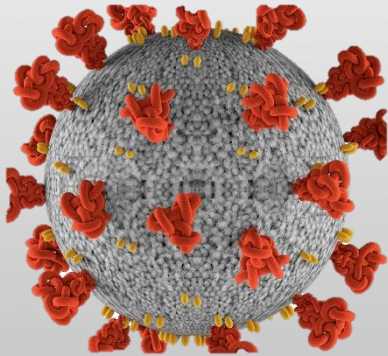


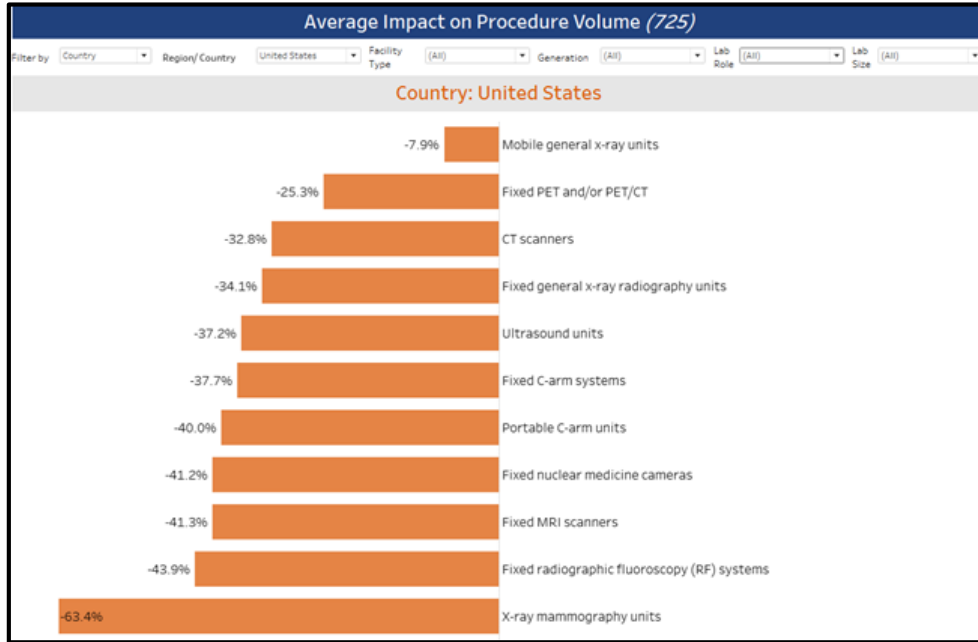
Imaging Industry Capital Planning & Expenditure during COVID-19



IS3R Online Retreat
November 5th 2020

Mr. Toshio Takiguchi
President & CEO

Effect of COVID-19 on the Imaging Industry



*“radiology administrators and business managers reported **a sharp rebound in optimism about their business prospects** for the third quarter,” they have also noted that **“capital spending on equipment has been frozen for the duration of the COVID-19 crisis – however long that is”*****

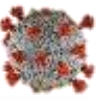
| | Market Change 2020HY vs 2019 HY*** | | | | | |
|---------------|------------------------------------|--------|--------|--------|--------|--------|
| | Total Imaging | CT | MRI | UL | XR | MI |
| Europe | -1.0% | 14.0% | -23.0% | 7.0% | 9.0% | -11.0% |
| Japan | -9.0% | -24.0% | -24.0% | -7.0% | 6.0% | 43.0% |
| USA | -31.1% | -34.9% | -38.8% | -21.7% | -24.2% | -33.3% |

Trends in Purchasing Models during 2020



- 
- Pricing pressure - capital equipment
 - Pricing pressure – maintenance & service agreements
 - Increased demand for deferred payment schedules
 - Multi-system standardization
 - Increased demand for fixed currency contracts
 - Increased demand for short term rental agreements

Regional variations in capital expenditure – factors



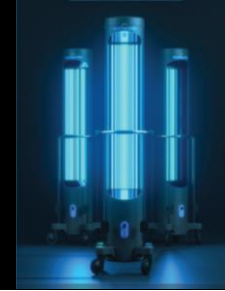
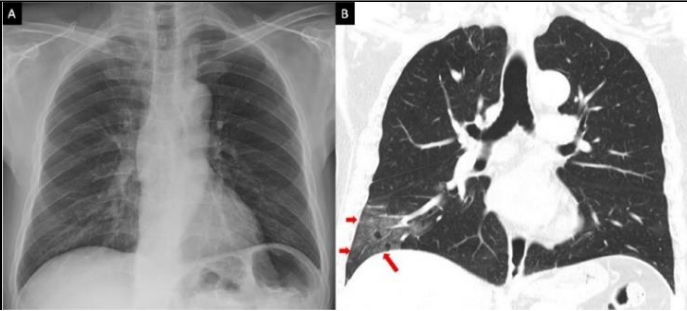
- ❑ Speed & intensity of disease spread
- ❑ Clinical workflow variations
- ❑ Budget availability
- ❑ Models of healthcare delivery
- ❑ Healthcare system capacity



Purchasing best practice in the time of COVID



CT used for improved visualization of ground-glass features[†]



**UV
Disinfection
(~10 mins)**

CT, CXR, and US used for case management*

Rapid Disinfection

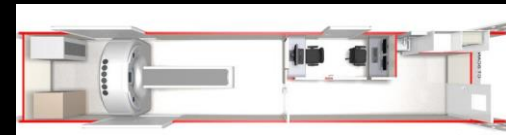
Aquilion™ Prime SP

+

AiCE
Integrated Intelligence



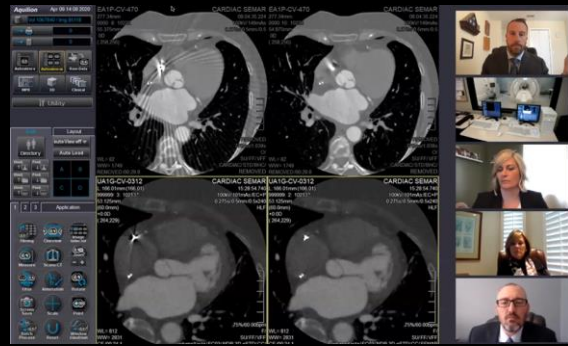
Mobile CT and
Modular Buildings



Complete Clinical Capability

Isolated Imaging Units

COVID driven changes in priorities

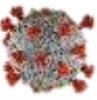


❑ Virtual equipment demonstration

❑ Virtual conference

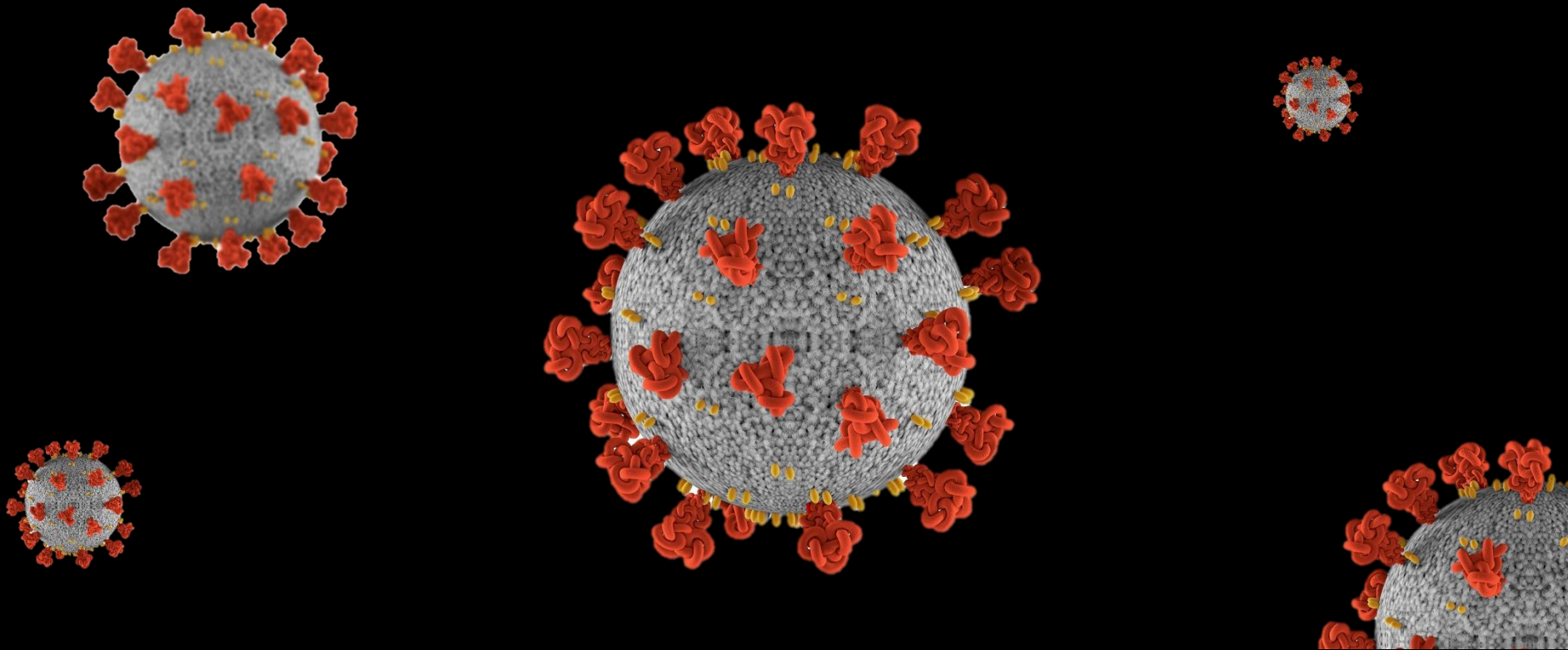
❑ Virtual site visits

Preferred vendor relationships in the time of COVID



Bill Melnik, customer engineer; Dan Bracken, customer engineer; Kerri Lee, applications specialist; and Alyssa Fugatt, applications specialist.

In summary...



Made For life

For over 100 years, the Canon Medical Systems `Made for Life' philosophy prevails as our ongoing commitment to humanity - generations of inherited passion creates a legacy of medical innovation and service that continues to evolve as we do. By engaging the brilliant minds of many, we continue to set the benchmark, because we believe quality of life should be a given, not the exception.

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