Agenda

1. GCM Sector Overview
2. FY2013 Business Plan
3. FY2013 Key Initiatives
1. GCM Sector Overview

2. FY2013 Business Plan

3. FY2013 Key Initiatives
**GCM Sector Overview**

Number of employees as of March 31, 2012: approx. 15,000 (Japan: 7,000, overseas: 8,000)

**GCM Sector**
- **Global**
- **Regional**
- **Local**

**Function**
- Global Strategy

**GCM Sector**
- AVC Marketing Div. (AVM)
- Appliances Marketing Div. (APM)
- CS Div.

**Regional Strategy**
- Sales Company Support

**Local Strategy**
- Touch point

**Consumers/sales channel Partners**
- Global
- Regional
- Local

**Mission of GCMS**

**As a Challenger, Innovate Customer Lifestyle**

"All Over the World"

- Pursuit Consumer Solution -

**Mission**
- To expand global consumer business with customer oriented 'product planning' and 'PULL marketing' as core strategy

**Goal**
- Target at No.1 market share brand (target at No.1 or 2 on value basis)

**3 Values**
- Open
- Fair
- Bold [TEAM Panasonic]

**Power of Global “One” Marketing Strategy**
Agenda

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3. FY2013 Key Initiatives

Market Trend

<table>
<thead>
<tr>
<th>GDP</th>
<th>Industry Growth Ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>CY12 forecast</td>
</tr>
<tr>
<td>Japan</td>
<td>2.0%</td>
</tr>
<tr>
<td>US</td>
<td>2.1%</td>
</tr>
<tr>
<td>Europe</td>
<td>-0.3%</td>
</tr>
<tr>
<td>Brazil</td>
<td>3.0%</td>
</tr>
<tr>
<td>India</td>
<td>6.9%</td>
</tr>
<tr>
<td>China</td>
<td>8.2%</td>
</tr>
</tbody>
</table>

IMF Outlook
As of April 17, 2012

Note: Consumer electronics sector (excl. Cell phones, IT related products)
USA: Panasonic estimate based on CEA(AV products)
Europe: Panasonic Estimate based on GFK(EU5 CE total)
Japan, Brazil, India, China: Panasonic estimate
**FY2013 Business Plan**

- **Sales**: 2,385.0 bil. yen (+/-0% vs. FY12)
- Double-digit growth: Latin America, Asia
- Positive growth: Middle East, Africa, China
- Overseas Sales ratio: 53% (FY12) ⇒ 55% (FY13)

**FY2013 Sales by Product Category**

- **Overseas**
  - AV Products: 56%
  - Other Appliances: 14%
- **Japan**
  - AV Products: 39%
  - Other Appliances: 10%

**China**

- vs. LY
- AV vs. LY +14%
- Appliances vs. LY 61%
- AV Products vs. LY 51%

**Middle East & Africa**

- vs. LY
- AV vs. LY +14%
- Appliances vs. LY 44%
- AV Products vs. LY 39%

**Japan**

- vs. LY
- AV vs. LY +13%
- Appliances vs. LY 61%
- AV Products vs. LY 39%

**N. America**

- vs. LY
- AV vs. LY +9%
- Appliances vs. LY 61%
- AV Products vs. LY 39%

**L. America**

- vs. LY
- AV vs. LY +5%
- Appliances vs. LY 44%
- AV Products vs. LY 39%

**Asia & Pacific**

- vs. LY
- AV vs. LY +14%
- Appliances vs. LY 44%
- AV Products vs. LY 39%

**Europe**

- vs. LY
- AV vs. LY +9%
- Appliances vs. LY 61%
- AV Products vs. LY 39%
1. GCM Sector Overview
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FY2013 Growth Strategy

1. Products Strategy: Grow with appliances
2. Market Strategy: Grow in emerging markets
3. Marketing: Strengthen ‘PULL strategy’
1. Products

**Grow with Appliances**

- Increase appliances sales with air conditioners
- Shift to value added product lineup to maintain profitability in TV business

### Sales by Products Category

<table>
<thead>
<tr>
<th>Category</th>
<th>FY12 Results</th>
<th>FY13 Forecast</th>
</tr>
</thead>
<tbody>
<tr>
<td>TVs</td>
<td><strong>2,384 bil. yen</strong></td>
<td><strong>2,385 bil. yen</strong></td>
</tr>
<tr>
<td>DSC</td>
<td><strong>6% vs. FY12</strong></td>
<td><strong>+73 bil yen</strong></td>
</tr>
<tr>
<td>Other AV</td>
<td><strong>+6% vs. FY12</strong></td>
<td><strong>(Overseas sales +20% vs. FY12)</strong></td>
</tr>
<tr>
<td>Refrigerator</td>
<td><strong>Air Conditioner</strong></td>
<td><strong>Washing machine</strong></td>
</tr>
<tr>
<td>Washing machine</td>
<td><strong>Small Appliances</strong></td>
<td><strong>E&amp;L</strong></td>
</tr>
<tr>
<td>E&amp;L</td>
<td><strong>PV etc.</strong></td>
<td><strong>Globally expand large appliance business with eco marketing, promoting air conditioner in emerging market</strong></td>
</tr>
<tr>
<td>Increase sales with mirror-less SLR to gain market share</td>
<td></td>
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</tbody>
</table>
1. Products

**Air Conditioners (A/C)**

- Expand business in emerging market with locally oriented room air conditioners and other products
- Expand sales channel especially in US and Europe with commercial-use air conditioner

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**Room Air Conditioner**

**Commercial-use Air Conditioner**

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### 1. Products

**‘ECONAVI’ Brand**

**Establish Eco brand promoting ECONAVI**

**Promote our superior energy saving technologies**

<table>
<thead>
<tr>
<th>Marketing concept</th>
<th>FY2012</th>
<th>FY2013</th>
<th>FY2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Japan</td>
<td>🍃</td>
<td>🍃</td>
<td>🍃</td>
</tr>
<tr>
<td>Asia Pacific</td>
<td>🍃</td>
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<tr>
<td>CIS</td>
<td>🍃</td>
<td>🍃</td>
<td>🍃</td>
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<tr>
<td>India</td>
<td>🍃</td>
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<tr>
<td>Middle East</td>
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<td>Brazil</td>
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<tr>
<td>China</td>
<td>🍃</td>
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<td>🍃</td>
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<tr>
<td>Europe</td>
<td>🍃</td>
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</tbody>
</table>

Introduce approx. 270 models in more than 90 countries
1. Products

Small Appliances

1. Globally introduce Japan and Europe oriented products
2. Expand ‘Local Fit’ product lineup with ODM products
3. Strengthen ‘bundle’ promotion

<table>
<thead>
<tr>
<th>Beauty/grooming products</th>
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<tbody>
<tr>
<td>Japan oriented products to global market</td>
</tr>
<tr>
<td>Europe oriented products to global market</td>
</tr>
<tr>
<td>Expand ‘Local Fit’ products</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Kitchen Small Appliances</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe oriented products to global market</td>
</tr>
<tr>
<td>Expand ‘Local Fit’ products</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>FY2012</th>
<th>FY2013</th>
<th>FY2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>Parts Beauty products in Japan</td>
<td>Globally expand Parts Beauty products</td>
<td></td>
</tr>
<tr>
<td>Markets</td>
<td>China/Asia</td>
<td>Expand VZ lineup</td>
<td>Introduce VZ</td>
</tr>
<tr>
<td>ODM products</td>
<td>Introduce at CIS</td>
<td></td>
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</tr>
</tbody>
</table>

*Parts Beauty: Nail Care, Eyelash Curler, Body care
Panasonic Ideas for life

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1. Products

TV

- Increase sales as core product in home appliance, focusing on profitability
- Shift strategies to higher value added product lineup with larger screen, LED, FHD and Smart TV

**LED TV**

<table>
<thead>
<tr>
<th>FY 2012</th>
<th>FY 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>58%</td>
<td>70%</td>
</tr>
</tbody>
</table>

Sales portion of LED

**Full HD**

<table>
<thead>
<tr>
<th>FY 2012</th>
<th>FY 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>73%</td>
<td>85%</td>
</tr>
</tbody>
</table>

Sales Portion of over 37” FHD

**Smart TV**

<table>
<thead>
<tr>
<th>FY 2012</th>
<th>FY 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>22%</td>
<td>45%</td>
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</tbody>
</table>

Sales Portion of Smart TV
1. **Products**

**Improve Business Structure**

- **Appliance sales ratio**: 41% (FY2011) ⇒ 52% (FY2013)
- **TV sales ratio**: 34% (FY2011) ⇒ 22% (FY2013)

**Sales ratio**

- **TV**: 34% (FY11), 26% (FY12), 22% (FY13(e))
- **Other AV products**: 24% (FY11), 25% (FY12), 25% (FY13(e))
- **Appliance**: 41% (FY11), 49% (FY12), 52% (FY13(e))

2. **Market**

**Emerging Markets**

- Increase sales for middle class clientele, and in suburban area
- Capture demand with ‘Local Fit’ products
2. Market

Sales by Regions

- Sales in emerging market makes up sales drop in Japan, US and E.U.

![Graph showing sales by regions]

FY12 Results: 2,384 bil. yen
FY13 forecast: 2,385 bil. yen

Total sales in emerging markets: 468 bil. yen (+15% vs. LY)

+60 bil. yen

1. India, Brazil, China

- Invest capitals as corporate project
  - A/C, Washing machine (FY13 commence production)
  - Expand lineup (Local Production, ODM) Capture demand in suburban area

2. ASEAN cluster

- Washing machine: FY13 commence local production
- Establish washing machine, refrigerator R&D site

ASEAN: Integrate merchandising and cluster marketing incl. Mekong Delta Sub-Region (Cambodia-Myanmar)

3. New Emerging country

- Expand business with TVs and air conditioners
- Introduce lineups for India to:
  - India neighbors (Bangladesh, Sri Lanka)
  - Africa (Angora, Kenya, Nigeria)

Grow in Emerging Markets

- Strengthen product lineup with local production, ODM and import from other regions and capture demand in middle class clientele

*1 ASEAN cluster: Vietnam, Indonesia, Philippines, Malaysia, Singapore, Thai, Cambodia, Myanmar
*2 New emerging countries: Bangladesh, Sri Lanka, African region
Capture Demand with ‘Local Fit’ Products

Capture demand in top to bottom of middle class clientele

India (approx. 220 mil. households)  China (approx. 400 mil. households)

- Wealthy, new rich classes (approx. 2.9 mil. households)
- Bottom of middle class
- Wealthy, new rich classes (approx. 54 mil. households)
- Bottom of middle class

Past target

Current target

FY2011 (Panasonic estimate)

2. Market Emerging Market

Locally-Oriented Product (AV)

‘Local Fit’: local planning, local production and local consumption
Promote R&D, manufacturing, marketing and customer services by local staffs

**LCD TV ‘Sound for India’**

- Introduce IPTV with 32” model at affordable price (compared with others)
  - High end and large screen products
  - Differentiate with ‘Sound’ and ‘Easy IP TV’

**Latin America Audio**

- Introduce high end product with large size speakers suitable for home parties at less than 800K peso
  - Differentiate with ‘Powerful and clear sound’
## Locally Oriented Product (Appliances)

### 2. Market

#### Emerging Market

**India: air conditioner ‘CUBE’**
- Introduce separate type A/C at same price level as window type A/C
  - differentiate with ‘Silent sound’ and ‘energy saving’

**China: air purifier (G10)**
- Introduce product with timer and cigarette deodorization at less than 1,000 RMB price level
  - differentiate with ‘Design’ and ‘cigarette deodorization’

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## ODM Products (India)

- **Strengthen product lineup with in-house and ODM products**

### Air Conditioner
- Panasonic/RAC
- Panasonic/Cube

### Refrigerator
- Panasonic/1 door
- ODM/1 door

### Washing machines
- Panasonic/Full Auto
- ODM/Twin Tub

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2. Market

Sales Increase with ‘Local Fit’ Products (Case in India)

Introduce ‘Local Fit’ Products, expanding sales channels and lineup to increase sales

**Air conditioner**
- **In-house CUBE**
  - 1.8 times vs. LY (FY11 → FY12)
  - Doubled number of sales channels
  - Launched in-house CUBE in Jan, 2011

**Refrigerator**
- **ODM products with 1 door direct cooling**
  - 2.3 times vs. LY (FY11 → FY12)
  - Increased 1.5 times of number of sales channels
  - Launched ODM products with 1 door direct cooling in Dec., 2010

**Washing machine**
- **ODM Twin Tub**
  - 3.6 times vs. LY (FY11 → FY12)
  - Increased 1.5 times of number of sales channels
  - Launched ODM Twin Tub in May, 2011

Local Lifestyle Research and Design Sites

- Develop ‘Local Fit’ products at local lifestyle research and design sites

- Local design sites (China, Malaysia, US, UK)
- Local lifestyle research sites (Brazil, India, China, UAE, Germany)
- Lifestyle research group of overseas manufacturing companies (Thailand, Malaysia, Indonesia, Philippines, Taiwan)
2. Market Emerging Market

Sales Forecast in Emerging Markets

Sales ratio in Emerging markets (in GCM overseas sales)

- China
- ASEAN Cluster
- India
- Brazil
- New Emerging countries

FY2012 Results: 17%
FY2013 Forecast: 20%

+15%

3. Marketing

Strengthen ‘PULL Strategy’

Strengthen advertising and branding in overseas

Advertising Investment In Overseas Market

FY2012 Results
FY2013 Forecast

1.5 Times
Towards V-Shaped Recovery

Strengthen Market perspective ‘product planning’ and ‘PULL marketing’ in overseas

Promote global marketing strategy collaborating with business domain companies
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