

Growth Strategy for LED Lighting Business

November 8, 2011

Panasonic Corporation
Executive Officer
Kuniaki Matsukage

Note: In this presentation, "FY2007" refers to the year ended March 31, 2007. This applies to the fiscal year after "FY2007."

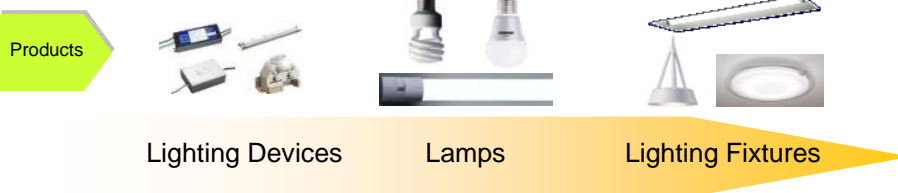
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1. Outline of Lighting Business
2. Market Environment of LED Lighting
3. Growth Strategy for LED Lighting Business

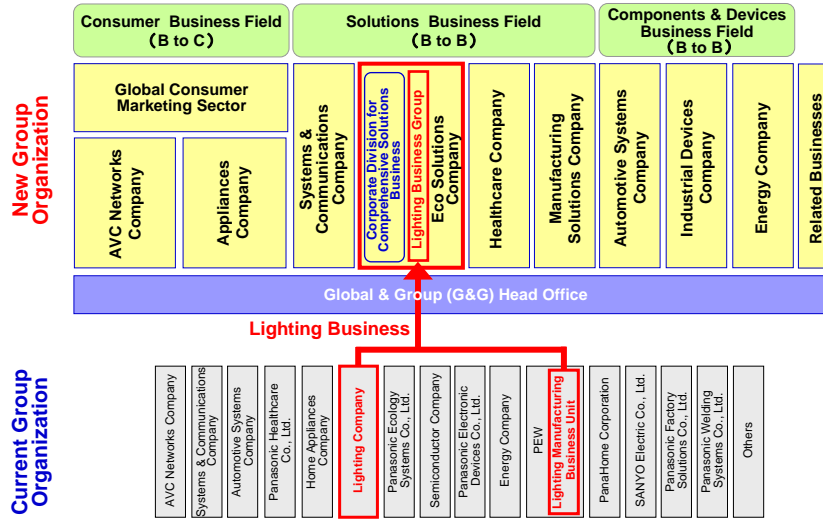
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1. Outline of Lighting Business

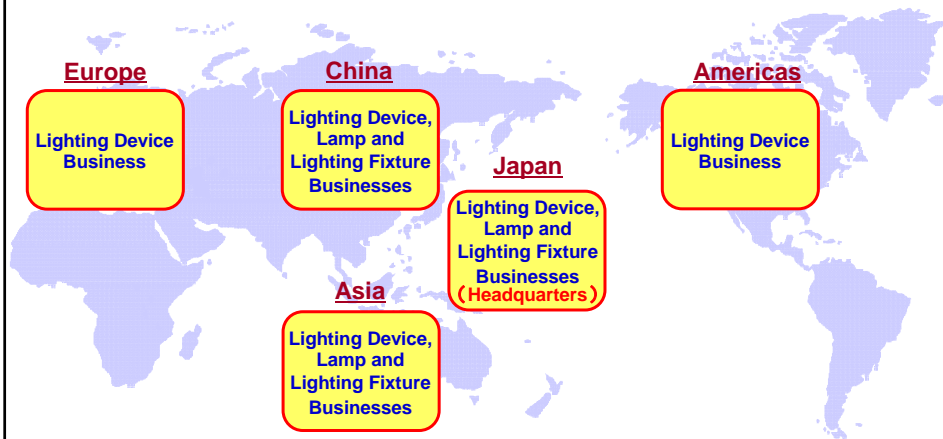
Manufacturing & Sales Products and Markets

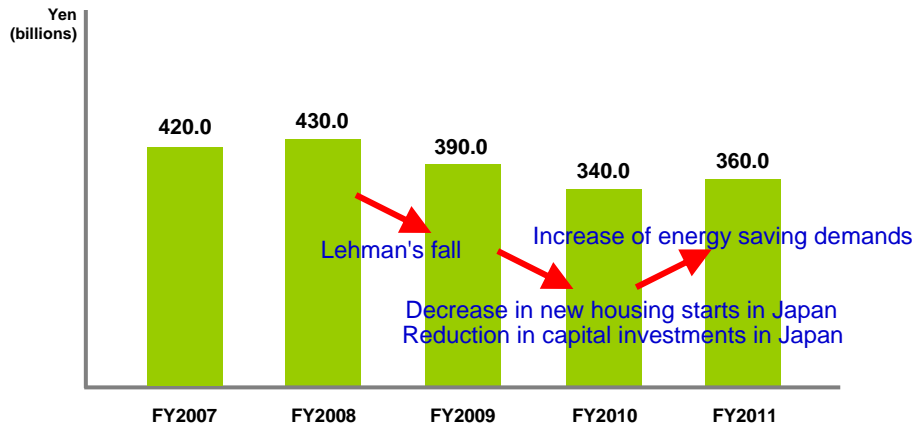


Eco Solutions Company is in Charge of Lighting Business



Lighting Business Operations at 5 Prime Locations Worldwide

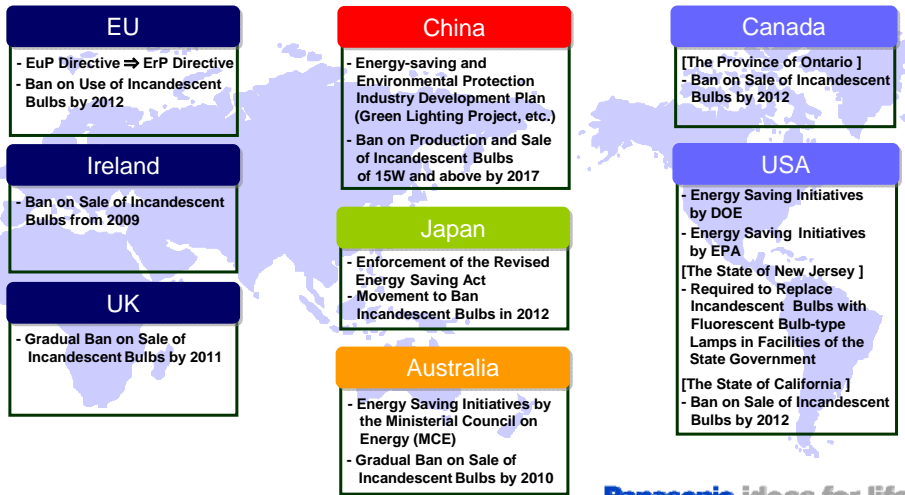




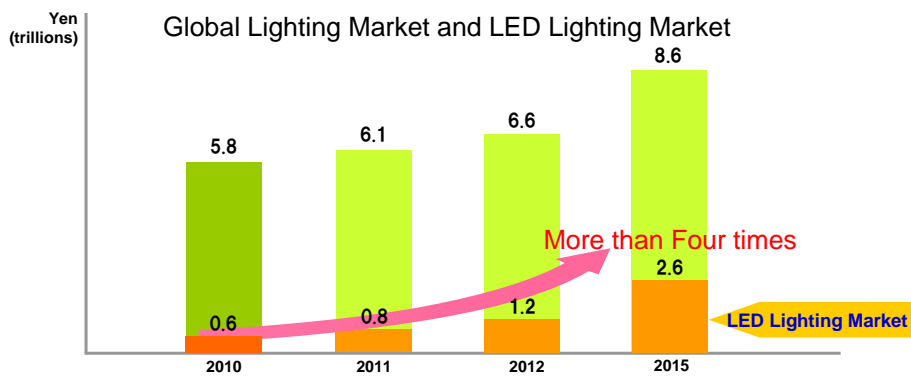
The amount of the chart is total sales of Lighting Company and PEW's lighting business (approximate calculation).

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Expanding Efforts for Energy Saving to Prevent Global Warming

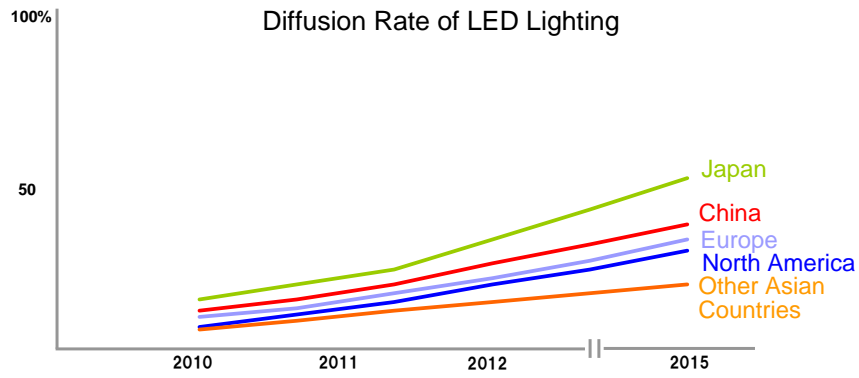


Current Global Lighting Market Size is Approx. 6 Trillion Yen
Expanding Market with LED Lighting as Growth Driver



(Source: Panasonic, as of October 2011, ¥75/US\$)

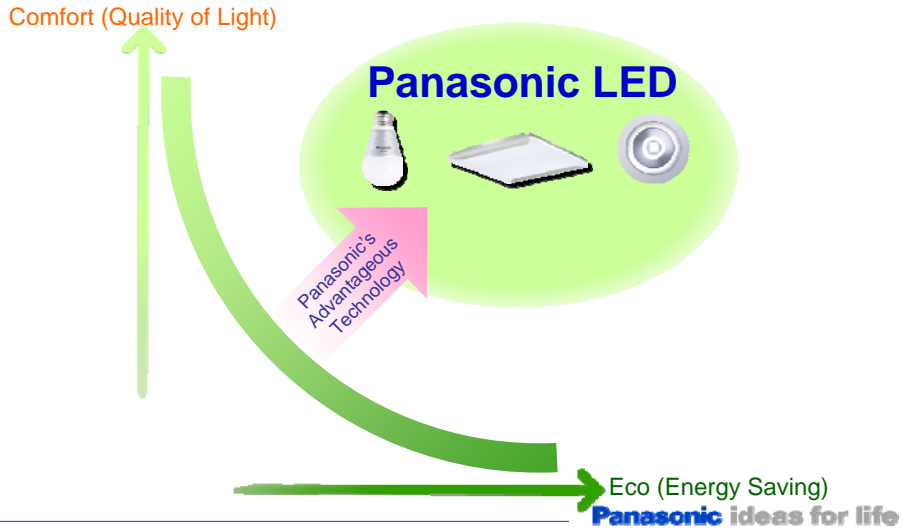
Japan Goes Ahead with LED Lighting,
China and Europe are Following



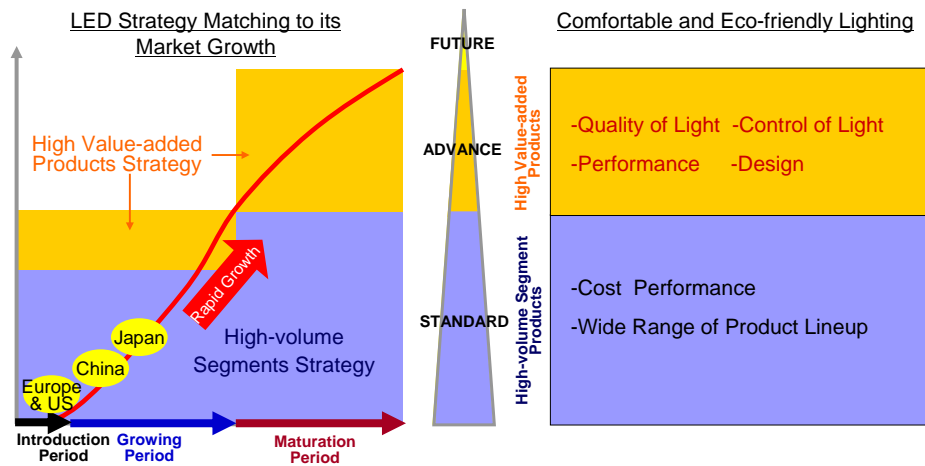
(Source: Panasonic, as of October 2011, ¥75/US\$)

1. Outline of Lighting Business
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Panasonic Aims for Comfortable and Eco-friendly LED Lighting



Realizing High Value-added Products Strategy and High-volume Segments Strategy



Panasonic's Strength (1)

Taking Vital Step towards Expanding Use of LED Lighting Globally

Accelerating Development of the Alternative technologies

Continuously Creating Eco-friendly LED Lamps



Note: The industry's first, the industry's leading and the industry's lightest weight are as of the date which the news release were issued by Panasonic.

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Panasonic's Strength (2)

LED Clear Type Bulb - Nostalgic Beautiful Light and Energy Saving -

LED Clear Type Bulb

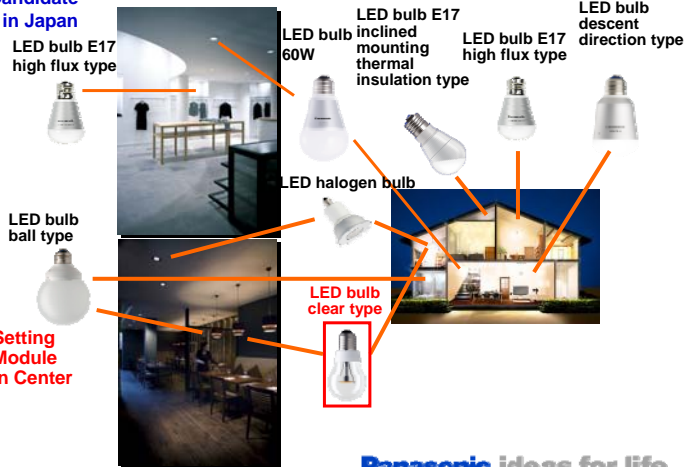
Comprehensive Solutions for Store

Comprehensive Solutions for Home

Selected as a Grand Award Candidate for Good Design Award 2011 in Japan



(LDAHV4L27CG)

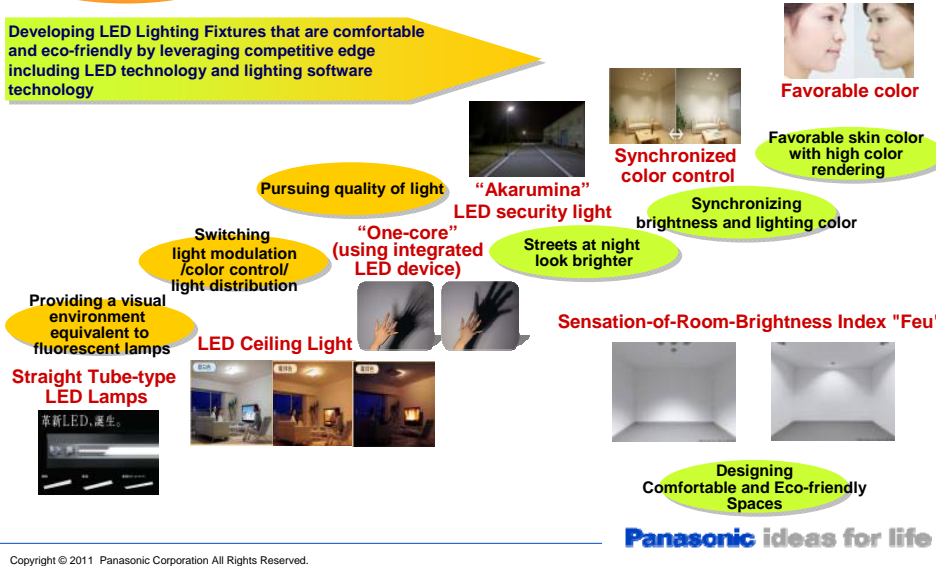


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Panasonic's Strength (3) Pursuing "Quality of Light" and "Control of Light" as well as Energy Saving for Lighting Fixtures

Developing LED Lighting Fixtures that are comfortable and eco-friendly by leveraging competitive edge including LED technology and lighting software technology



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Panasonic's Strength (3) Example Favorable Color LED Lighting Fixtures -Expressing Skin Tone Favorably and Reproducing Color of Objects Naturally-

Main product features



Favorable Color LED Lighting Fixture Existing Lighting Fixture

Key Technology

- Panasonic's One-of-a-kind Evaluation Index of Desirability of Skin Color
- Advanced Technology That Controls Specific Light Wavelengths

- Realizing High Color Rendering (Ra95) while Expressing Skin Tone More Favorably
- LED Lighting Fixture Enhancing the Value of Commercial Facilities and Stores

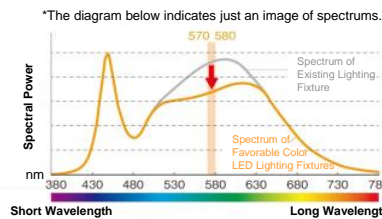
Target Markets

Expanding into Lighting Markets for Stores



Product Lineup

Scheduled to be Released Next Spring




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Panasonic's Strength (3) Example Sensation-of-Room-Brightness Index "Feu".

Which Space Looks Brighter?




Feu 9.5

420 lx

General Downlights
(installed in the center)

power consumption **210W**

- Improving "Feu"
- Decreasing
Number of lamps
- Reducing **10%**
of Power
Consumption



Feu 12.5

290 lx

Wall Washer Downlights
(installed on the periphery)

power consumption **190W**

"Feu" is a concrete numerical index for illumination design indicating the Sensation-of-Room-Brightness, which had been assessed qualitatively by human sense. High-quality and energy-saving space design could be realized by using "Feu".

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Major Lighting Space Design Soft Technologies



Real CG
Lighting Space Simulation Technology



Feu
Verification-of-Room-Brightness Index



LSR
Verification Technology for Space Brightness (3D)



Luminous Planner
Verification Technology for Space Brightness (2D)

Offering Full Range of Solutions to Support Projects including Basic Concept, Basic Design and Maintenance.

Basic Concept
(Rough Sketch)

▶

Basic Design
("Real CG" Image)

▶

After Construction
(Photographed Image)

3F Departure Lobby



3F Departure Concourse







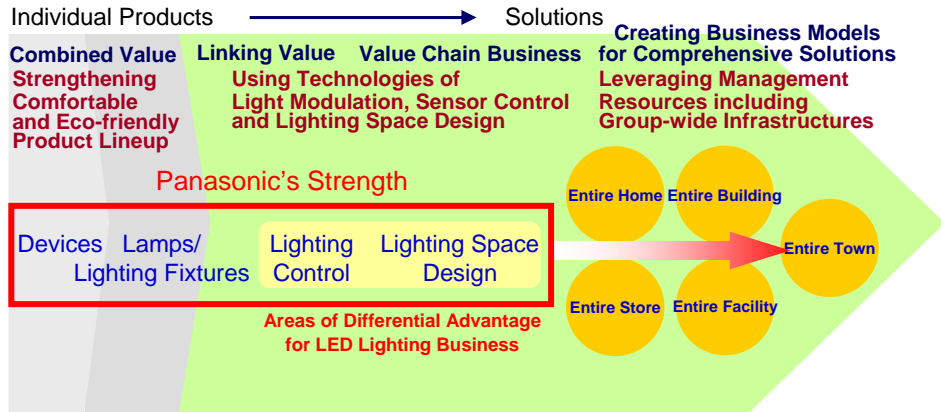


(The International Terminal Building of New Chitose Airport in Japan)

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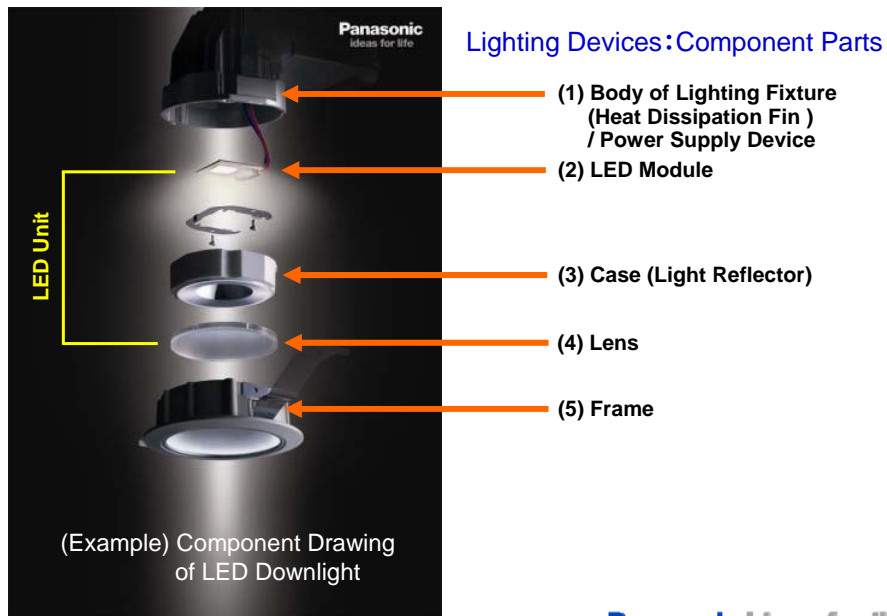
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Panasonic to Show the Strength in Lighting Space Design Offering Solutions for LED Lighting Worldwide



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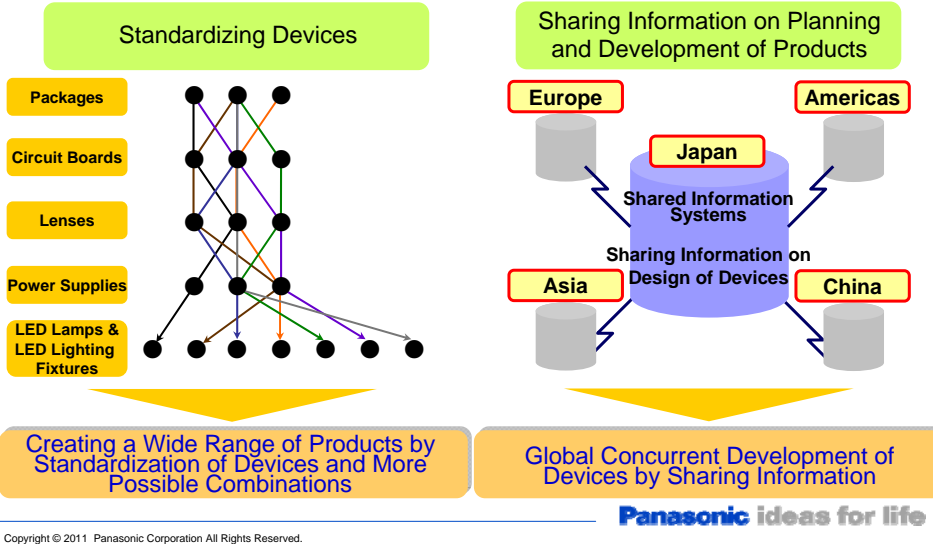
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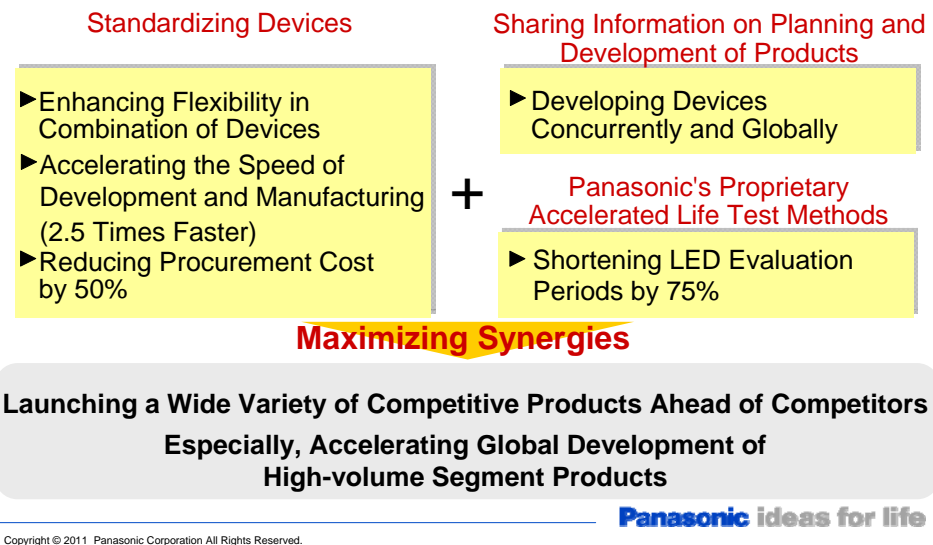
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Enhancing Standardization of Devices Globally for Creating Wide Range of Products



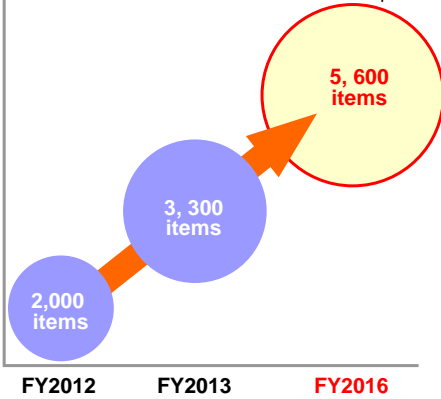
Maximizing Synergies of Manufacturing Capability Supporting Growth Strategy



Realizing Wide Range of Product Lineup Based on Panasonic's Strengths of Manufacturing Capability

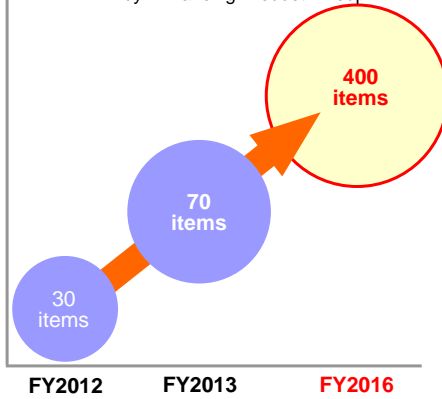
LED Lighting Fixtures for Domestic Market

Striving for the No.1 Domestic Market Position with Most Extensive Product Lineup



LED Lamps for Domestic Market

Accelerating Replacement of Incandescent lamps by Enhancing Product Lineup



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Focusing on Global Market with Strategic Allocation of Management Resources

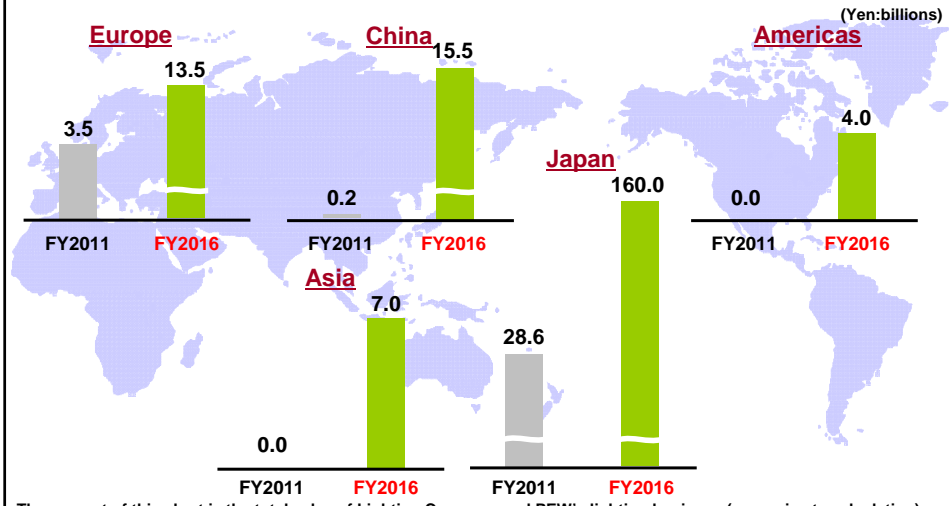
	Japan	China	Asia	Europe	Americas
Basic Strategy	Full Lineup Strategy • Realizing a Wide Range of Lineup	Expanding BtoC Business as well as Continuously Developing the Government Project • Strengthening Panasonic Brand through the Government Project	Introduction of Energy Saving Bulb-type Fluorescent Lamp Business prior to LED Lighting • Expanding LED Lighting Product Lineup by Using Sales Channels	Fully Utilizing the Strength of "VS" *1 • Strengthening Sales of Devices for Lighting Fixture Manufacturers	Fully Utilizing the Strength of "ULT" *2 • Strengthening Sales of Devices for Lighting Fixture Manufacturers
Strategy by Products	Devices	Promoting R&D of Devices	(Japan, China and Asia: In-house Use)		Enhancing the Sales of LED Units for Lighting Fixture Manufactures in Europe and US
	Lamps	Accelerating Product Development for Consumers in Each Region			
	Lighting Fixtures	Focusing on China and Asia including Japan			

*1: Panasonic Electric Works Vossloh-Schwabe GmbH

*2: Universal Lighting Technologies, Inc.

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Striving to Achieve Regional Sales Targets in FY 2016
by Providing Solutions for LED Lighting

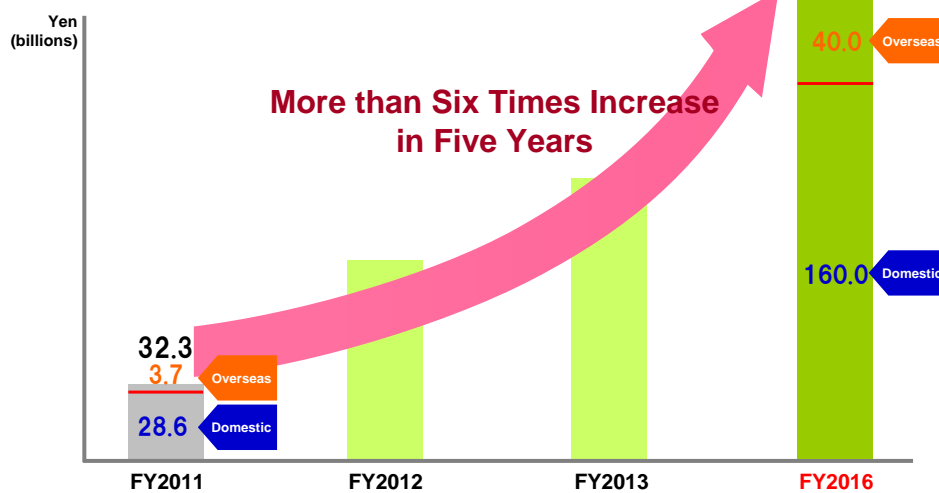


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Targeting for 200 Billion Yen in Sales and
LED Proportion 50% in FY2016



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