

TOUGHBOOK

TOUGHPAD

Panasonic BUSINESS

20
YEARS

RUGGED SINCE 1996

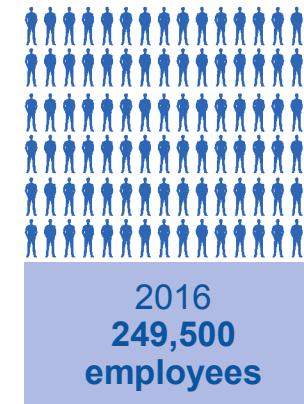
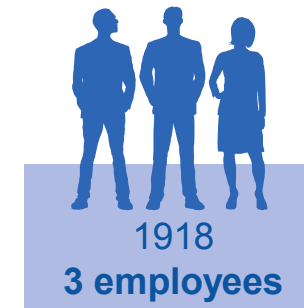
TOUGHBOOK



TOUGHBOOK, TOUGHPAD AND PANASONIC



- Panasonic produces more than 15,000 electronic products worldwide for multiple customer needs.
- Consolidated net sales of 7,55 trillion yen for the year ended March 31, 2016.
- Third-biggest publicly traded employer in Japan*.
- Holder of 100,632 global patents.
- Established in 1918, grown from just 3 to 249,500 employees.

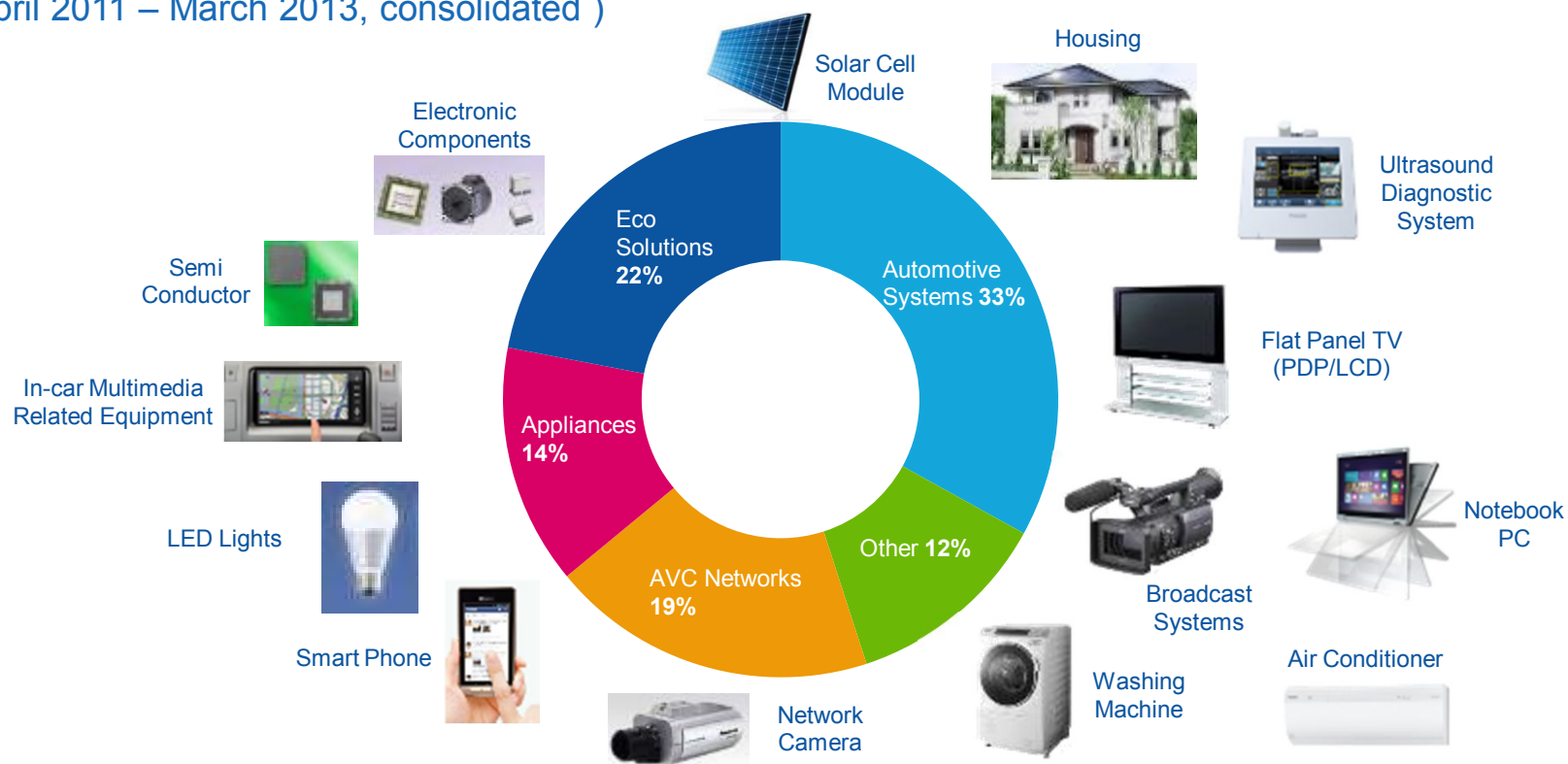


*Bloomberg data

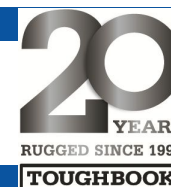
SALES BY BUSINESS SEGMENT










(April 2011 – March 2013, consolidated)



TOUGHBOOK AND TOUGHPAD RUGGED HISTORY



First mover		Innovation leadership		Executive Toughbook	Specialised products	Launch of Toughpad	
1987	1996	2002	2003	2007	2008	2012/2013	2016
Gaining valuable experience from the development of one of the most robust mobile computers of its time – e.g. in using carbon fibre for notebook cases.	First and only computer manufacturer to enter the very special market segment of ruggedised notebooks.	First and only wearable-solution – this wireless display can interface with any WLAN-equipped Toughbook model.	First robust notebook on the market with pivotal touch screen which transforms it into a tablet PC in no time at all.	Offering the best possible balance of long battery life, reduced weight and robustness.	Introducing specialised ruggedised UMPC for field application and sanitizable MCA for healthcare market.	Expanding Toughbook portfolio by introducing new product category of Toughpad.	CF-20 World's first detachable 2016
				CF-W5  CF-Y5  CF-TF 	CF-U1 UMPC  CF-H1 MCA 	FZ-G1  FZ-A1  UT-MB5  JT-B1 	
Nixdorf FT-2	CF-25	CF-VDW07	CF-18				CF-20

CUSTOMER-INSPIRED INNOVATION

20
YEARS
RUGGED SINCE 1996
TOUGHBOOK



CF-41

1994



CF-25

1996



CF-27

1999



CF-28

2001



CF-29

2004



CF-30

2007



CF-31

2010



Integrated
CD drive

World 1st

MOD

Rugged
Model

World 1st



WWAN



Kill BIOS

MOD

VOLVO



MIL Spec

Non Touch

Bluetooth

IP54

ISDN Model

SCR

Police forces

Backlit KBD

Concealed
mode

All products are developed
based on customer insight
and opinion

Panasonic BUSINESS

TOUGHBOOK

TOUGHPAD

PANASONIC'S SEVEN KEY TECHNOLOGIES



Every Toughbook and Toughpad is designed, developed and manufactured in-house to deliver the seven key technologies of Panasonic – fulfilling all requirements in a single unit.



Screen Visibility



Security



Connectivity



Ruggedness



Long Battery Life



Lightweight

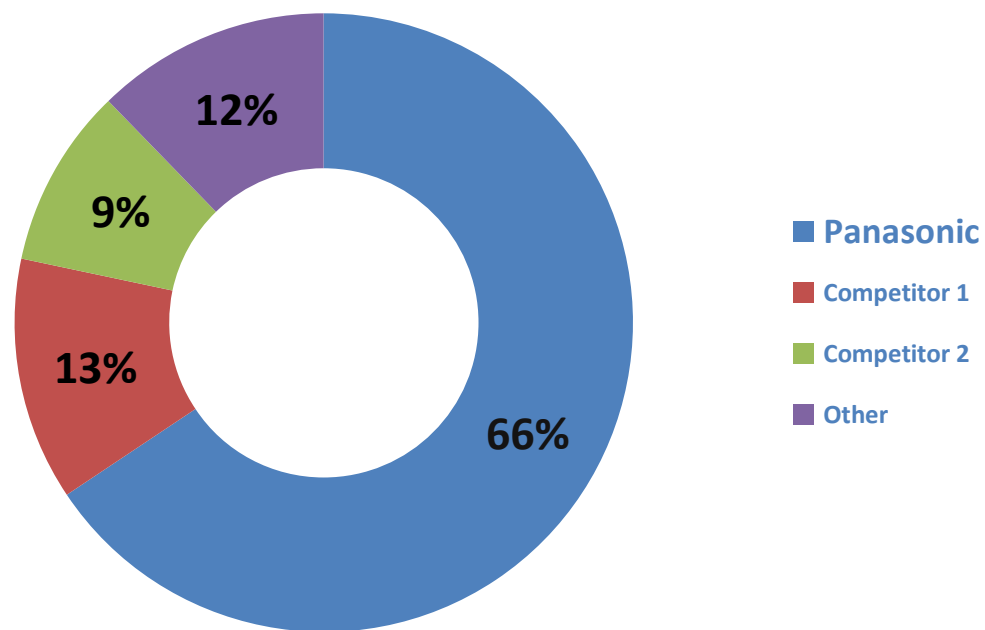


Thermal Management

MARKET SHARE NOTEBOOK: CY2015 EMEA



Durable and Rugged Notebook/Convertible Notebook Computers

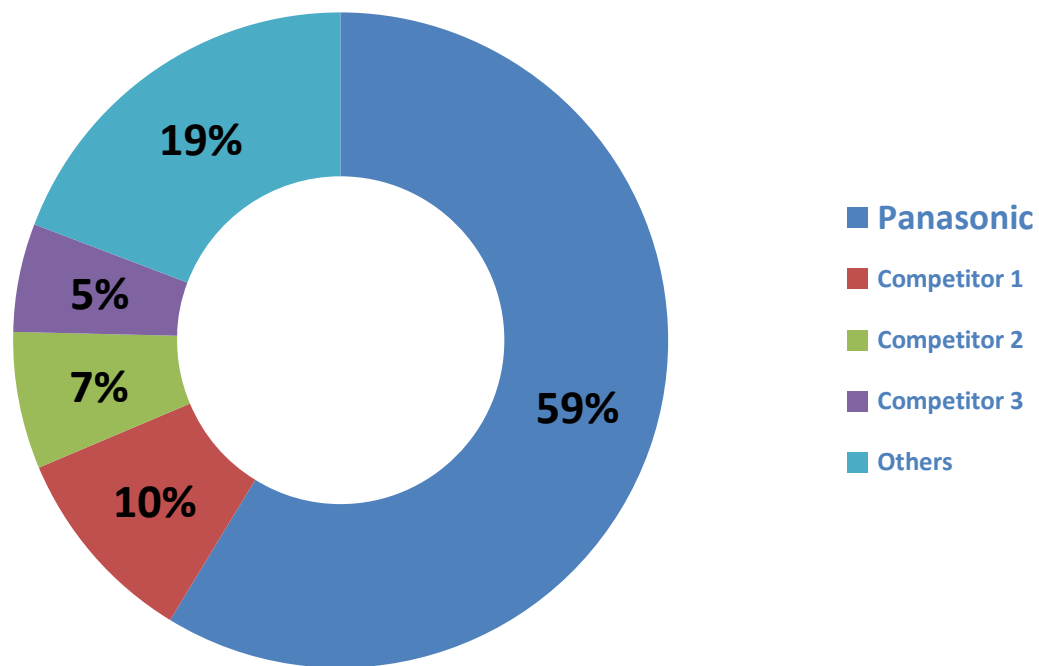


Source: VDC, 2016 Enterprise & Government Mobility Solutions (Revenue in US\$)

MARKET SHARE TABLET: CY2015 EMEA



Slate/Tablet Computers

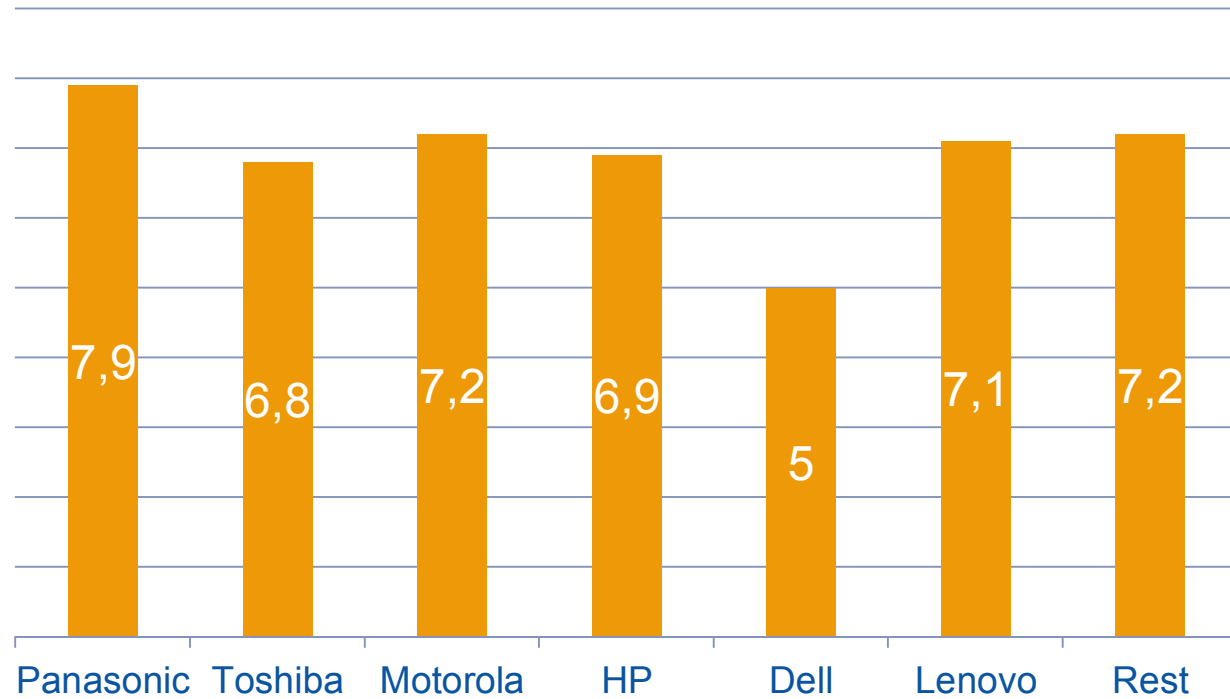


Source: VDC, 2016 Enterprise & Government Mobility Solutions (Revenue in US\$)

OVERALL CUSTOMER SATISFACTION – 2015 VDC RESEARCH

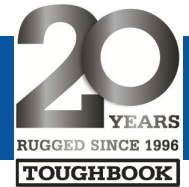


- Overall customer satisfaction is high with an average score of 7.9 on a 0-10 scale
- Panasonic outperforms all competitors on this metric

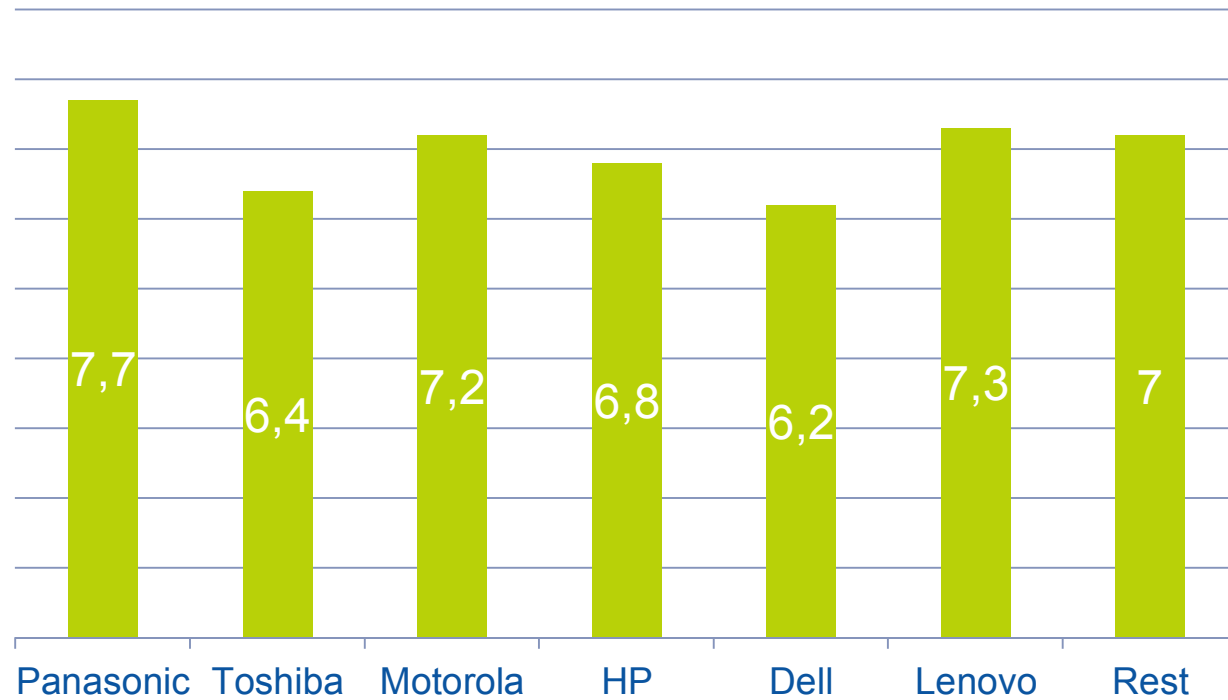


Source: VDC, 2015 Enterprise & Government Mobility Solutions (Revenue in US\$)

LIKELIHOOD OF REPEAT PURCHASE – 2015 VDC RESEARCH



- Likelihood of repeat purchase is also high with an average score of 7.7 on a 0-10 scale
- Panasonic, again, outperforms on this metric



Source: VDC, 2015 Enterprise & Government Mobility Solutions (Revenue in US\$)

OUR CUSTOMERS AROUND THE WORLD

20 YEARS
RUGGED SINCE 1996
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TOUGHPAD

GLOBAL TOUGHBOOK PRESENCE – Telecoms



Used by the major players in all key markets:

- 6 out of 10 of the world's largest telecoms companies use Toughbook

Utility Global			
Rank	Company	Market Value (US\$)	Toughbook usage
1.	China Mobile	271,5 B	
2.	Verizon	202,5 B	
3.	AT&T	173 B	
4.	Vodafone Group	88 B	
5.	NTT	71,5 B	
6.	Softbank	70,3 B	
7.	Deutsche Telekom	85 B	
8.	Telefonica	72,3 B	
9.	America Movil	74,5 B	
10.	China Telecom	53,9 B	

Source: Forbes.com Global 2015.

GLOBAL TOUGHBOOK PRESENCE – Utility



Used by the major players in all key markets:

- 6 out of 10 of the world's largest telecoms companies use Toughbook
- 10 out of 10 of the world's largest utilities companies use Toughbook

Utility Global			
Rank	Company	Market Value (US\$)	Toughbook usage
1.	E.on	30,3 B	TOUGHBOOK
2.	Suez	49,5 B	TOUGHBOOK
3.	ENEL	44,6 B	TOUGHBOOK
4.	EDF	46,3 B	TOUGHBOOK
5.	RWE	16 B	TOUGHBOOK
6.	Tokyo Electric Power	6,2 B	TOUGHBOOK
7.	Iberdola	42,3 B	TOUGHBOOK
8.	Centrica Group	18,8 B	TOUGHBOOK
9.	Kansai Electric Power	8,9 B	TOUGHBOOK
10.	Chubu Electric Power	9,1 B	TOUGHBOOK

Source: Forbes.com Global 2015.

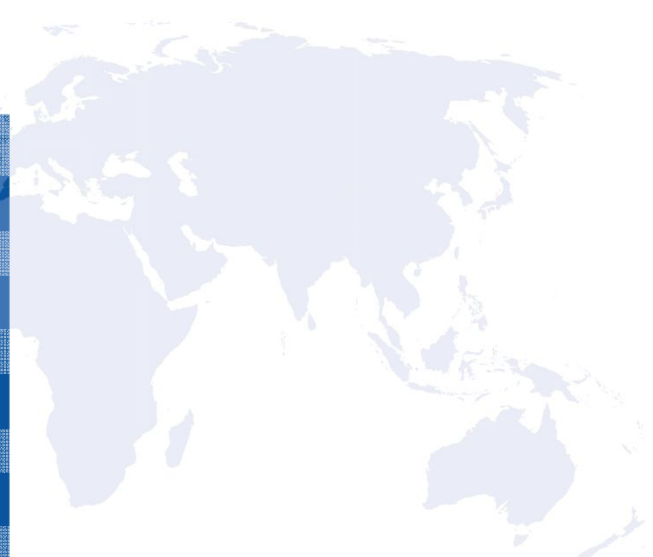
GLOBAL TOUGHBOOK PRESENCE – Automotive



Used by the major players in all key markets:

- 6 out of 10 of the world's largest telecoms companies use Toughbook
- 10 out of 10 of the world's largest utilities companies use Toughbook
- 9 out of 10 of the world's largest automotive companies use Toughbook

Automotive Global			
Rank	Company	Market Value (US\$)	Toughbook usage
1.	Volkswagen	126 B	
2.	Toyota	239 B	
3.	GM	59 B	
4.	Daimler	103,3 B	
5.	Ford	63,6 B	
6.	Nissan	45,9 B	
7.	BMW	81,4 B	
8.	Honda	61,4 B	
9.	Hyundai	32,9 B	
10.	SAIC Motor	47,1 B	



Source: Forbes.com Global 2015.

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Thank you

20
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Computer Product Solutions (CPS) BU, Panasonic System Communications Company Europe (PSCEU),
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