

**Notice Concerning Recognition of Losses Resulting from the Termination of a Supply Agreement
with a Major Customer and the Revision of Consolidated Financial Guidance for the Fiscal Year
Ending March 31, 2027**

TOKYO, JAPAN – October 8, 2026 – Terumo Corporation (TSE: 4543) decided today to mutually terminate the supply agreement with CSL Plasma, a major customer of the Terumo Group, following a mutually agreed transition period. As a result, the Company expects to recognize losses in its consolidated financial results for the fiscal year ending March 31, 2027, and has revised its full-year consolidated financial guidance for the same fiscal year, which was previously announced on August 7, 2026. The details are as follows.

1. Termination of a Supply Agreement with a Major Customer

Terumo Blood and Cell Technologies ("Terumo BCT"), a wholly owned subsidiary of Terumo Corporation, commenced a collaboration with CSL Plasma in 2021 for source plasma collection and has supplied source plasma collection devices to plasma collection centers operated by CSL Plasma in the United States. Terumo BCT and CSL Plasma have mutually agreed to terminate their existing supply agreement following a mutually agreed transition period. The transition of the affected centers will proceed in accordance with the transition plan agreed between the parties as part of the termination arrangements.

2. Recognition of Losses Resulting from the Termination of the Supply Agreement

(1) Details of the Losses

Following the agreement with CSL Plasma to terminate the supply agreement, the Company reassessed future revenue projections for Terumo BCT-related business. As a result, the Company expects to incur a financial impact that includes impairment losses on related assets and other related expenses. The Company currently estimates the total financial impact associated with this matter to be approximately US\$610 million (approximately ¥97.5 billion). Of this amount, approximately US\$450 million (approximately ¥72.0 billion) represents impairment losses related to manufacturing equipment at production facilities in the United States, machinery and equipment, product technologies, and other associated assets. These impairment losses are non-cash charges. The remaining approximately US\$160 million (approximately ¥25.5 billion) primarily consists of losses expected during the transition period, as well as costs associated with the termination of the agreement and related business restructuring activities.

These amounts are preliminary estimates and may change depending on future contractual negotiations, transition arrangements, asset valuations, and other factors. As the financial impact of these losses is not expected to fall within the materiality threshold exemption prescribed by the Tokyo Stock Exchange, the Company is making this disclosure.

(2) Future Actions

The Company remains committed to concentrating its management resources and investments

on its core Blood and Cell Technologies business. The Company will continue to support blood centers, healthcare providers, and customers in the cell and gene therapy field by delivering solutions characterized by high product quality, reliability, and continuous innovation.

3. Revision to Full-Year Consolidated Financial Guidance

Reflecting the losses described above, the Company has revised its full-year consolidated financial guidance for the fiscal year ending March 31, 2027. As the financial impact of the revision does not fall within the materiality threshold exemption prescribed by the Tokyo Stock Exchange, the Company is making this disclosure.

(1) Revisions to Full-Year Consolidated Financial Guidance for the Fiscal Year Ending March 31, 2027 (From April 1, 2026 to March 31, 2027)

	Revenue (Million yen)	Adjusted operating profit (Million yen)	Operating profit (Million yen)	Profit for the year attributable to owners of the parent (Million yen)	Basic earnings per share (yen)
Previous guidance (A)	1,239,000	274,500	257,500	193,100	130.91
Revised guidance (B)	1,229,500	274,500	160,000	120,000	81.35
Difference (B)-(A)	-9,500	-	-97,500	-73,100	—
Change (%)	-0.8%	-	-37.9%	-37.9%	—
(Reference) Results for FY2025	1,131,877	219,369	176,320	135,914	92.14

* For adjusted operating profit, the Company expects a positive impact of approximately ¥2.0 billion as a result of lower future depreciation and amortization expenses following the recognition of the impairment loss. In addition, in connection with the acquisition of Arsenal Medical announced on September 30, 2026, the Company expects to incur expenses of approximately ¥2.0 billion, including research and development expenses. These expenses have also been reflected in the revised full-year consolidated financial guidance.

(2) Reasons for the Revisions

Following the agreement with CSL Plasma to terminate the supply agreement, and reflecting impairment losses on related assets, losses expected during the transition period, and expenses associated with the termination of the agreement and related business restructuring activities, the Company has revised downward its full-year consolidated financial guidance with respect to operating profit and profit attributable to owners of the parent.

(Disclaimer)

Among the information disclosed by Terumo, forward-looking statements, including financial guidance, involve potential risks and uncertainties, as they are based on limited information available at the time of disclosure. Accordingly, actual results may differ from these statements due to various factors. Such factors include, but are not limited to, changes in the economic environment surrounding Terumo, fluctuations in foreign exchange rates, and the competitive landscape.