

# Introducing Renishaw 2016 - 2017

# About Renishaw

## World leading metrology company

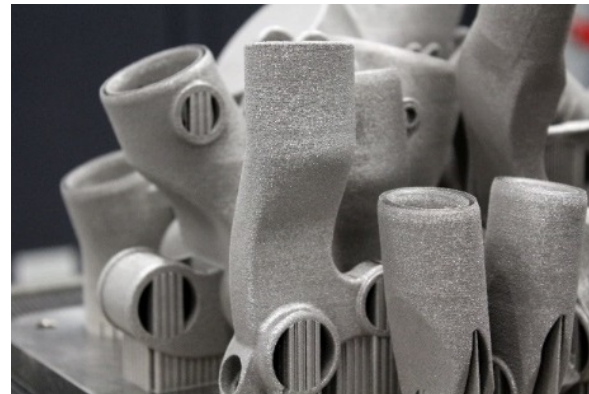
A FTSE 250 company with headquarters in the United Kingdom

## Advancing operational performance

Transforming manufacturing efficiencies and raising product quality

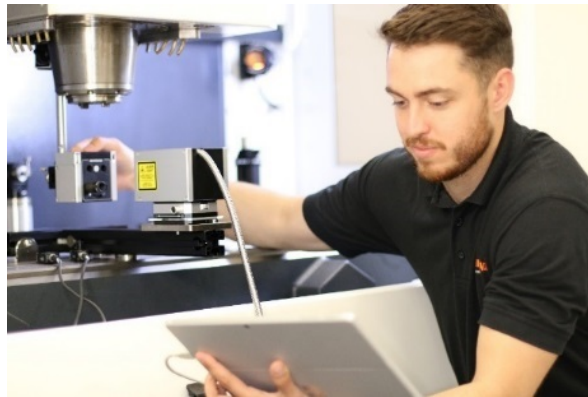
Maximising research capabilities

Improving medical procedures and patient outcomes



# Our mission

- Provide leading-edge technology by encouraging innovation to address our customers' needs.
- Design, manufacture, and supply metrology systems of the highest quality and reliability, enabling dimensional measurement to traceable standards.
- Strive for total customer satisfaction through superior customer service.

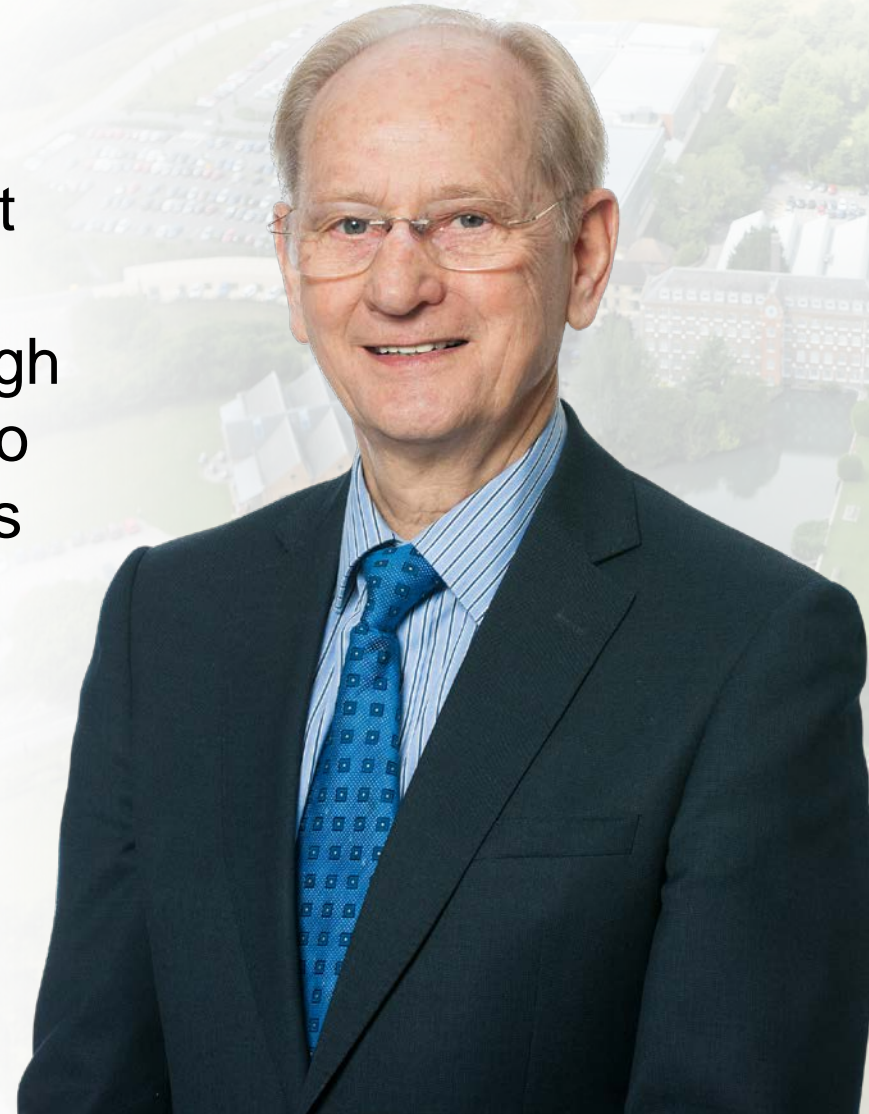


# Our ethos

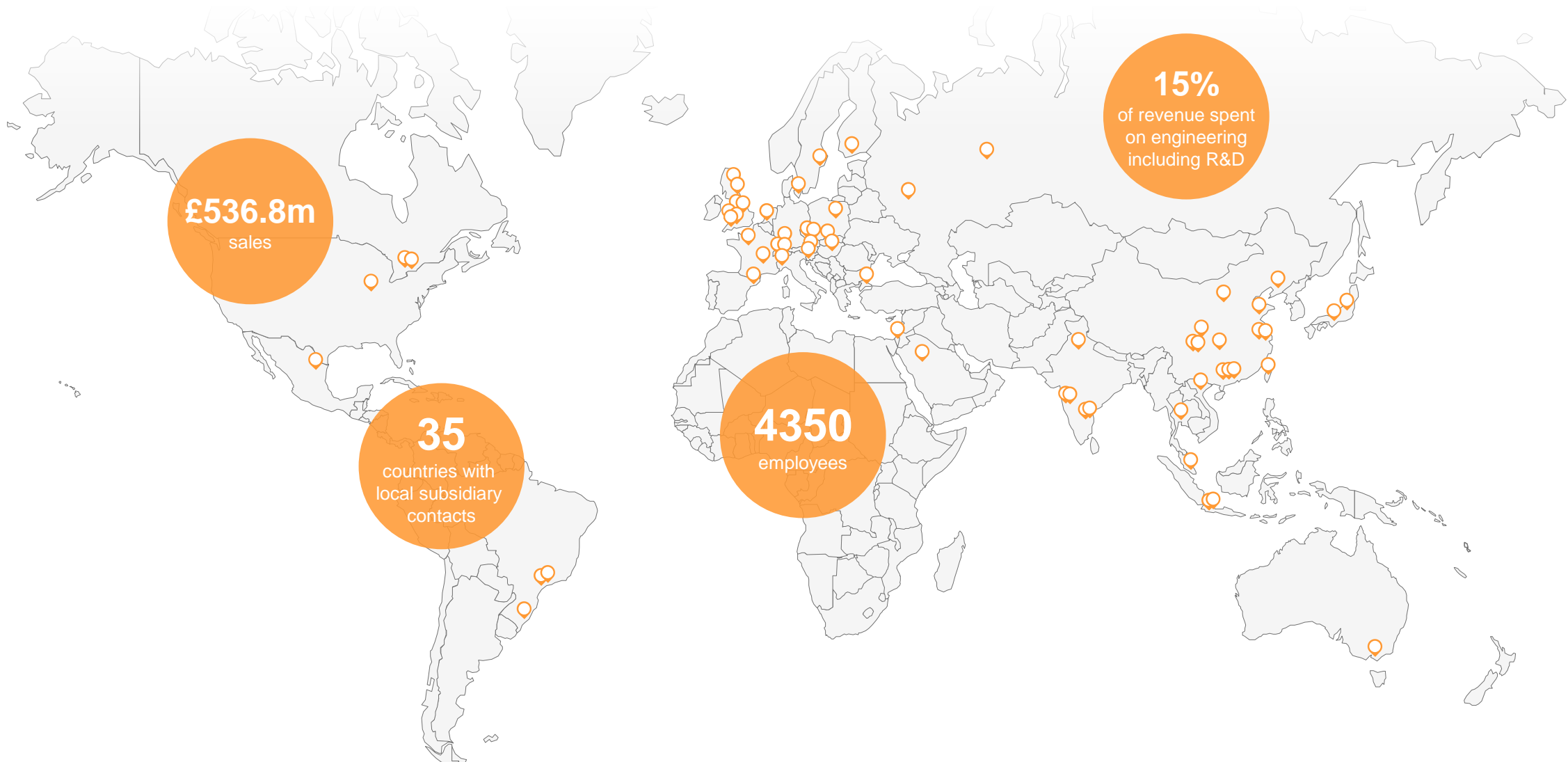
“Renishaw fundamentally believes that success comes from patented and innovative products and processes, high quality manufacturing, and the ability to provide local customer support in all its markets around the globe.”

**Sir David McMurtry**

Executive Chairman



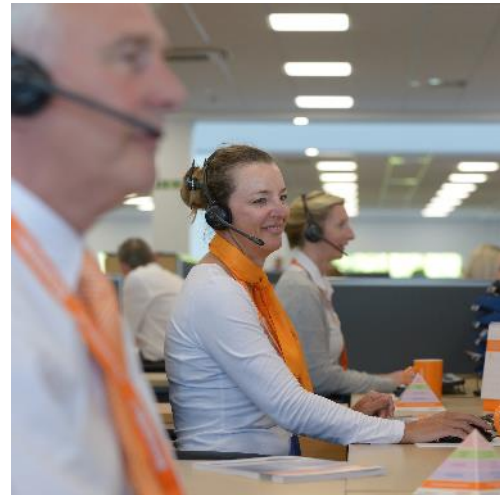
# Highlights in 2017



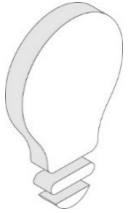
# Securing growth for the long term



To assure success, we undertake as many of our core activities as possible, including design, manufacturing, sales and support.



# Our strategy



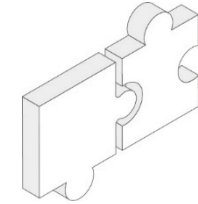
Continual research creating strong market positions with innovative products



Efficient high-quality manufacturing



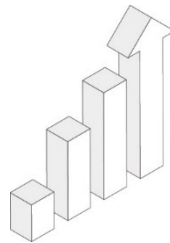
Strong market presence and focus on emerging markets



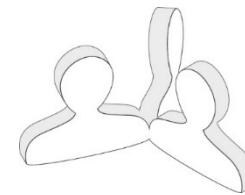
Building the business via acquisition



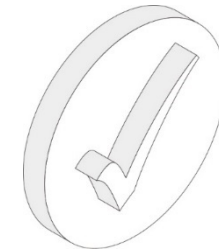
Customer support



Consistent organic growth



People



Focus on being a solutions provider

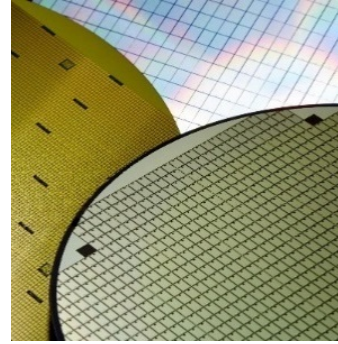
# Our customers



Aerospace



Automotive



Electronics



Energy



Heavy industry



Medical and  
healthcare



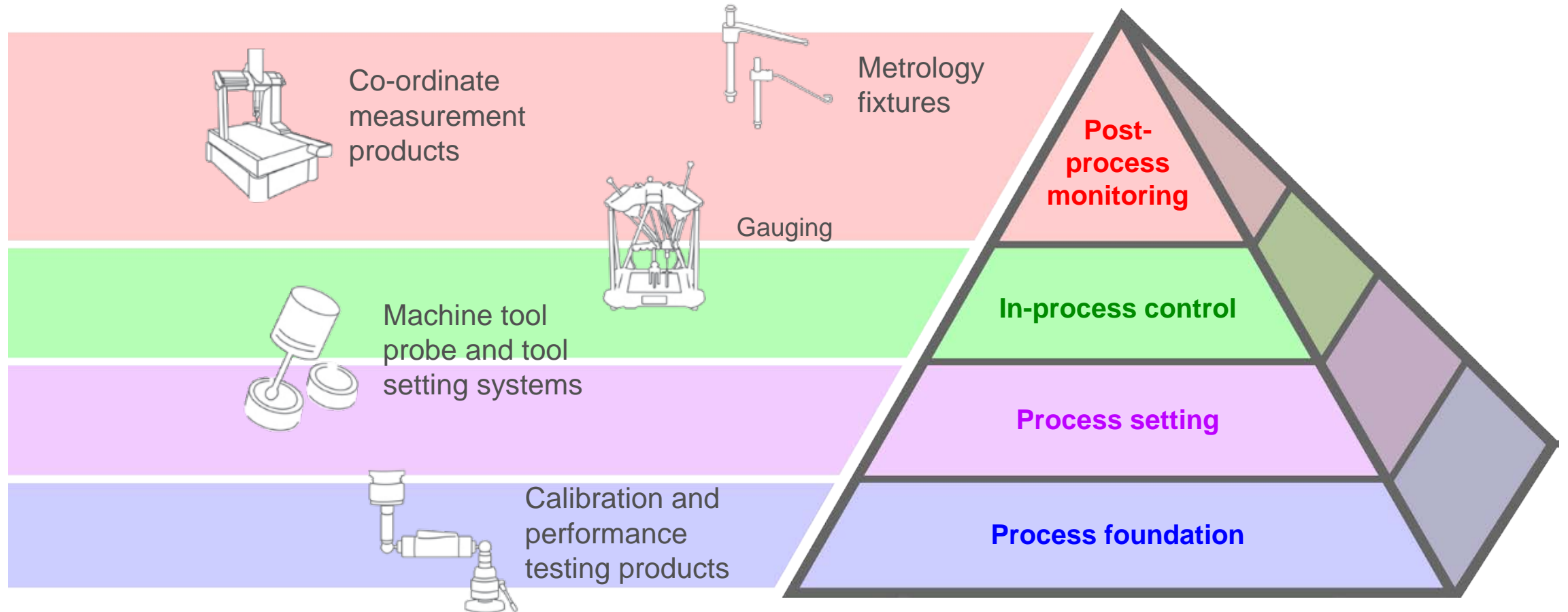
Precision  
manufacturing



Scientific,  
research and  
analysis



# Our expertise – Manufacturing process control

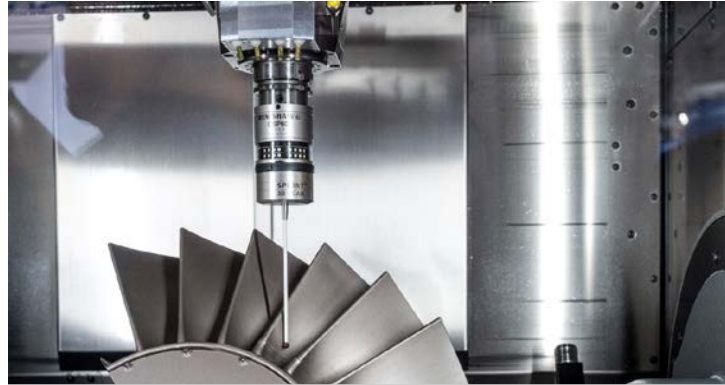


# Our expertise

## Industrial metrology



**CMM probes, software & retrofits**



**Machine tool probes and software**



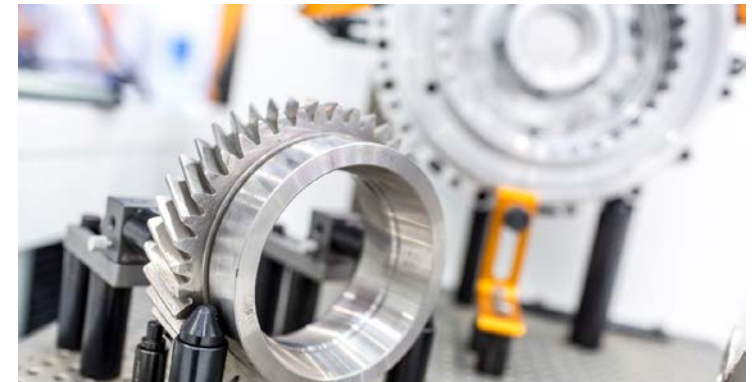
**Automated gauging systems**



**Machine calibration & optimisation**



**Styli for probes**



**Metrology fixtures**

# Our expertise

Additive manufacturing



# Our expertise

## Position encoders



Magnetic



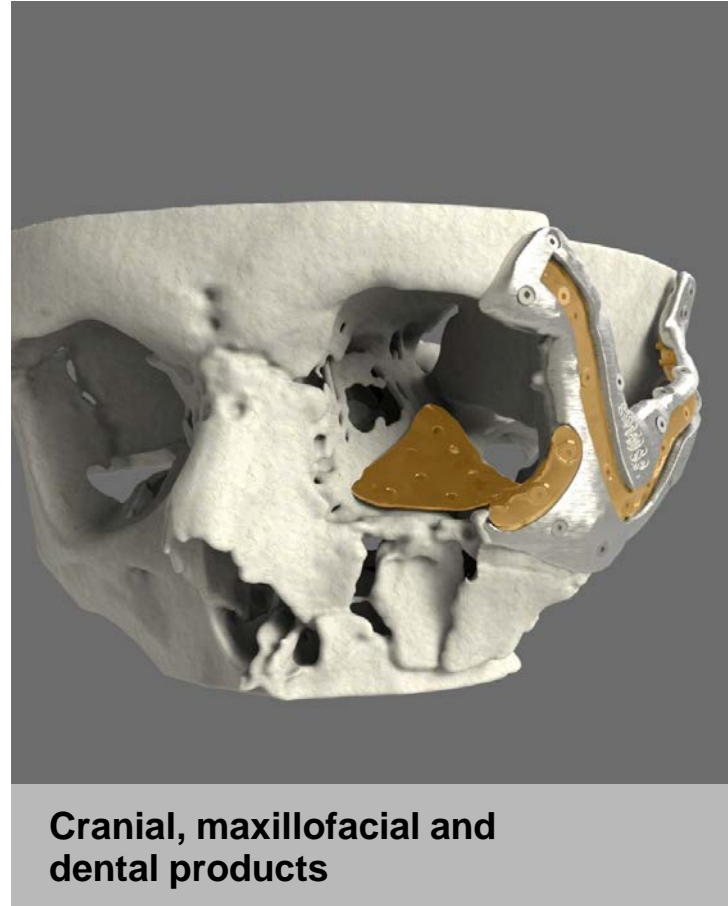
Optical



Laser

# Our expertise

## Healthcare



# Our service, your solution



Applications  
engineering



Custom turnkey  
solutions



End user  
retrofits

Hardware



Consultancy

Consumables  
supply



OEM fitment



Advanced  
products



Worldwide  
service and  
support

Software



Customer  
training

# Helping our customers succeed

**Consult** | Engineer | Implement | Support

- Understanding our clients' needs
- Establishing a relationship as a trusted partner

// We looked at the whole production cycle time and in some cases were able to reduce it by up to 50%.

//  
**Alp Aviation (Turkey)**



# Helping our customers succeed

Consult | **Engineer** | Implement | Support

- Drawing on experience with customers and our own processes
- Leveraging our R&D network

// REVO<sup>®</sup>, the flexible measuring system, significantly increases our measuring capacity and also scans deep-set features with high accuracy.

**MTU Friedrichshafen GmbH  
(Germany)**





# Helping our customers succeed

Consult | Engineer | **Implement** | Support

- Providing end-to-end solutions from a diverse product portfolio
- Using local expertise in 35 countries with international backup



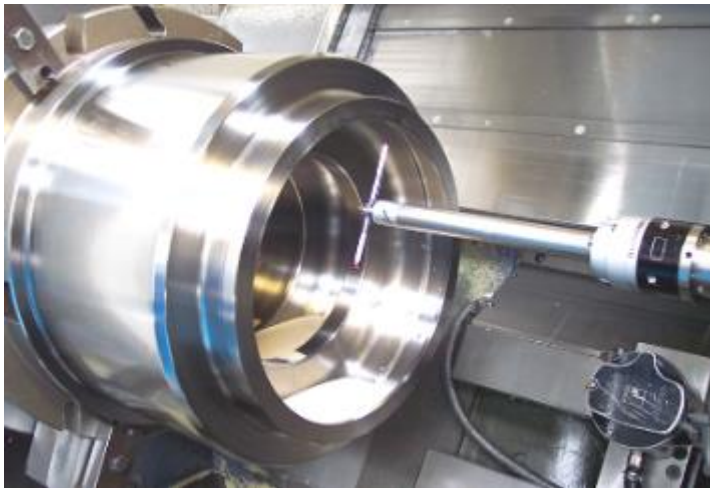
// For our machining cell, there was no other cost-effective, shop-floor measuring tool comparable to the Equator.

**Conroe (USA)**

# Helping our customers succeed

Consult | Engineer | Implement | **Support**

- Ensuring easy access to dedicated staff
- Same-day shipping of spares and consumables



// Throughout our use of CNC machines we have had a close relationship with Renishaw – the flexibility and willingness to assist has always been outstanding. //

**Castle Precision (UK)**

# Our commitment to innovation

“We have a long term commitment to Research and Development, with annual spend historically between 14 and 18% of revenue. We also invest heavily to create our own distribution channels and are prepared to make acquisitions when we find companies with complementary technology and people.”

**Geoff McFarland**

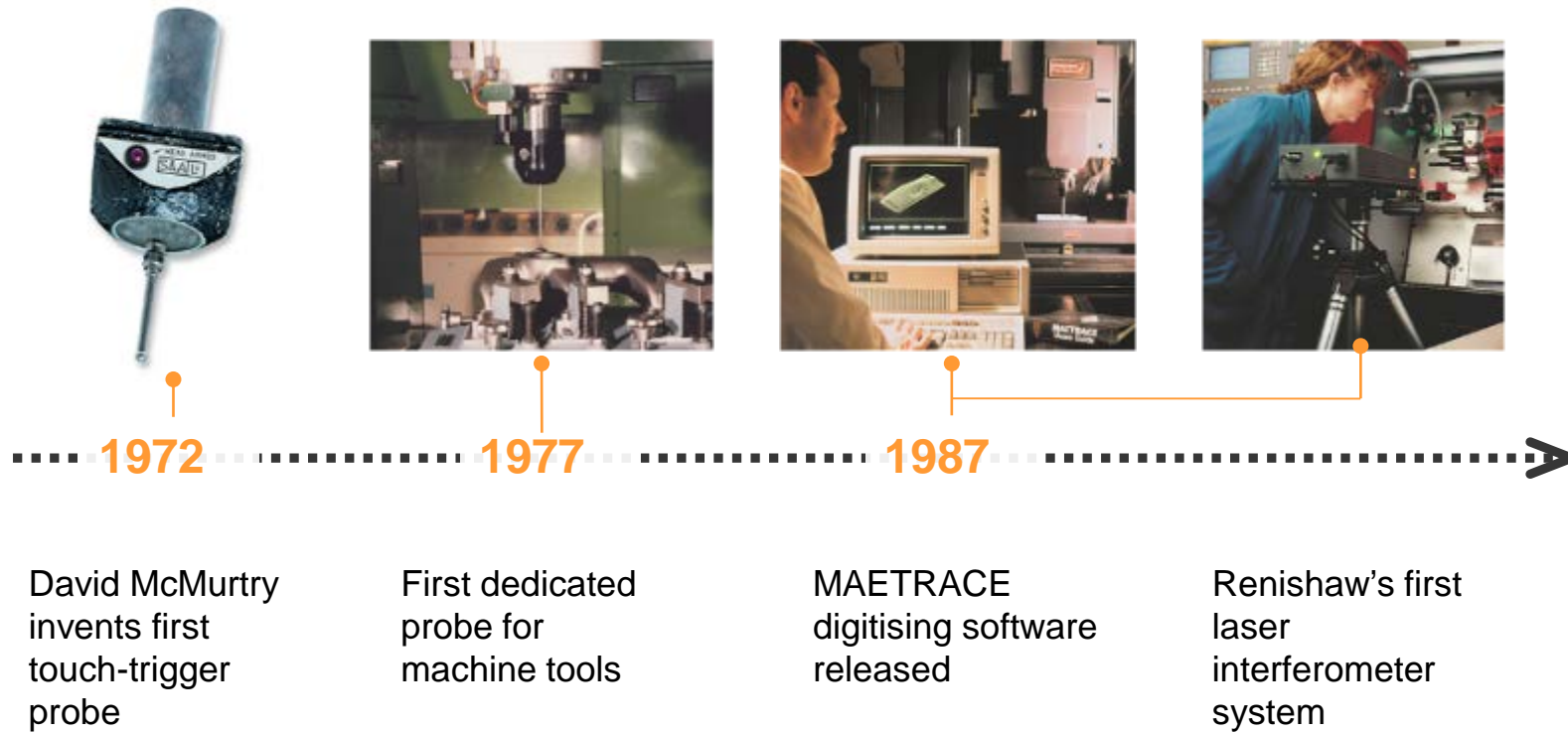
Group Engineering Director



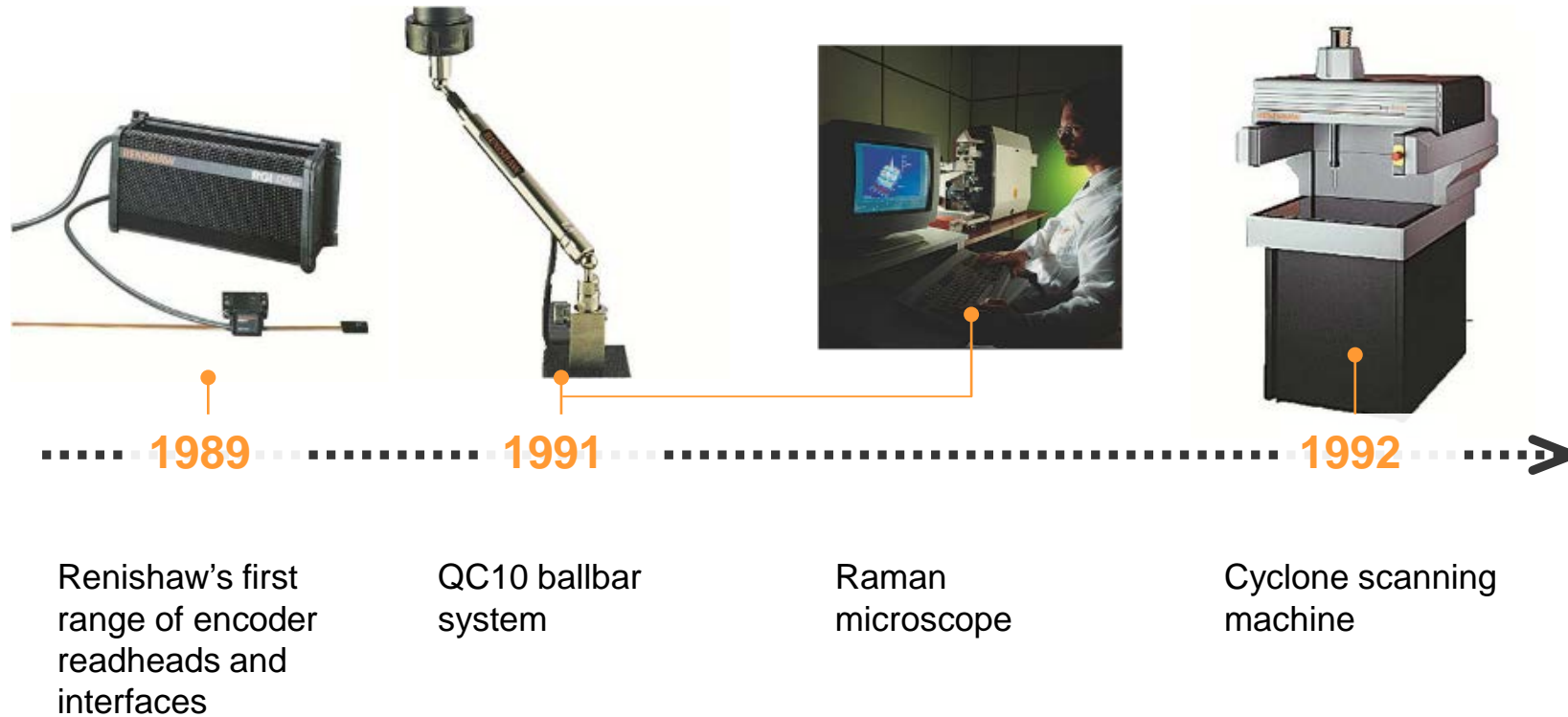


OVER 40 YEARS OF  
BREAKTHROUGH INNOVATION

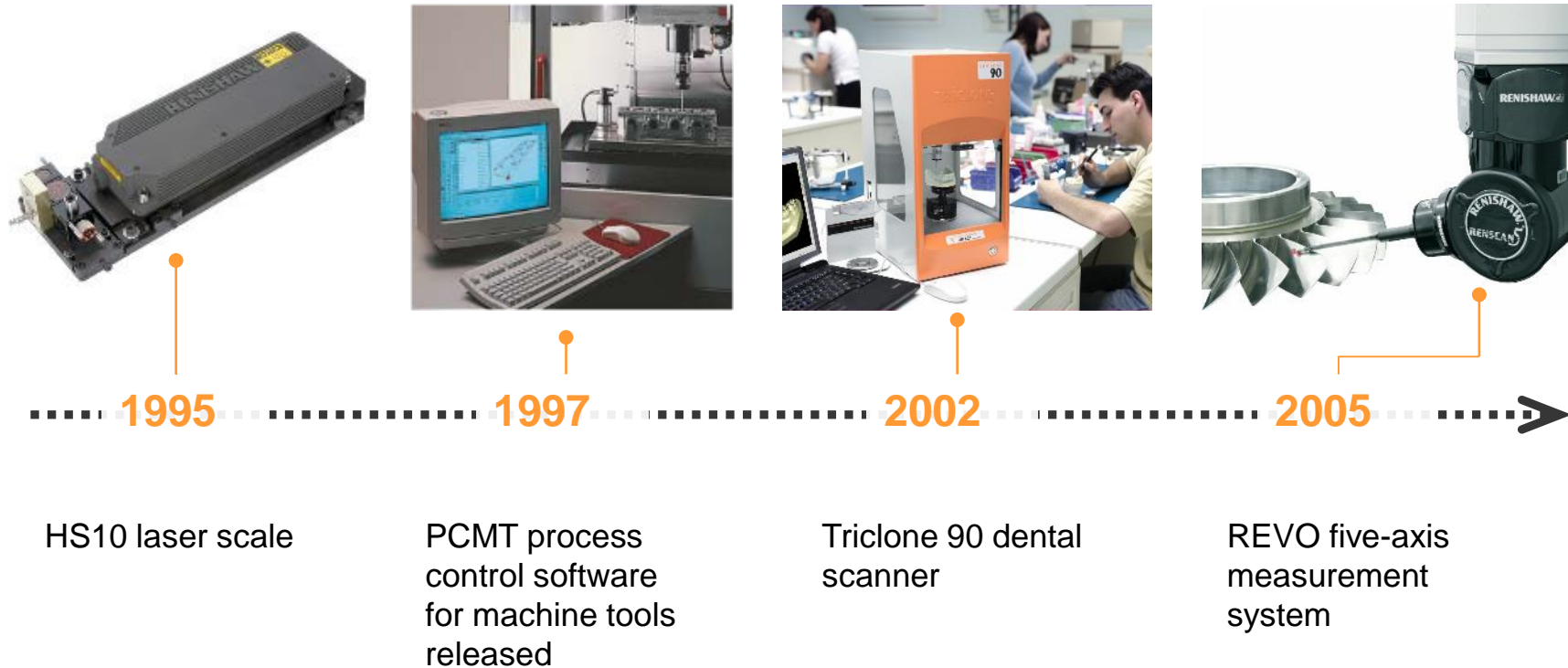
# Over 40 years of breakthrough innovation



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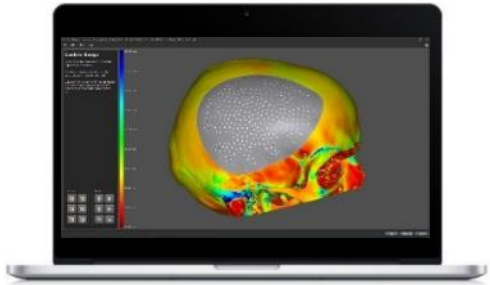




# Over 40 years of breakthrough innovation



# Over 40 years of breakthrough innovation



ADEPT software for  
craniomaxillofacial  
implant design

IPC Intelligent Process  
Control software

# Vision

“Over the years, we have tried to build a company that is different to most others. Different in how we apply technology to real world problems; in how we invest for the long term; in how we manufacture rather than outsource; in how we treat our customers as partners”

**Left: Sir David McMurtry**

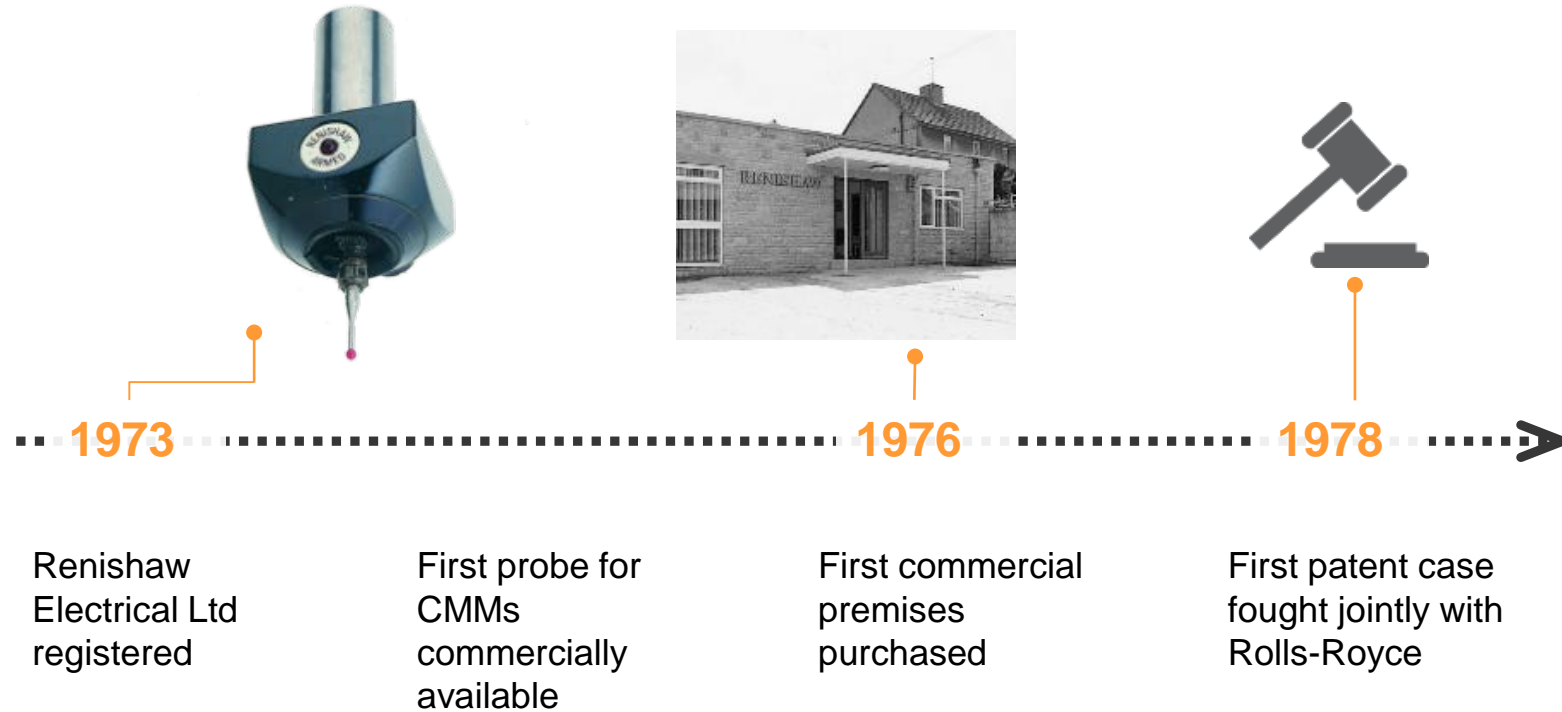
(Executive Chairman)

**Right: John Deer**

(Deputy Chairman)



# Our journey so far...



# Our journey so far...



1979

1981

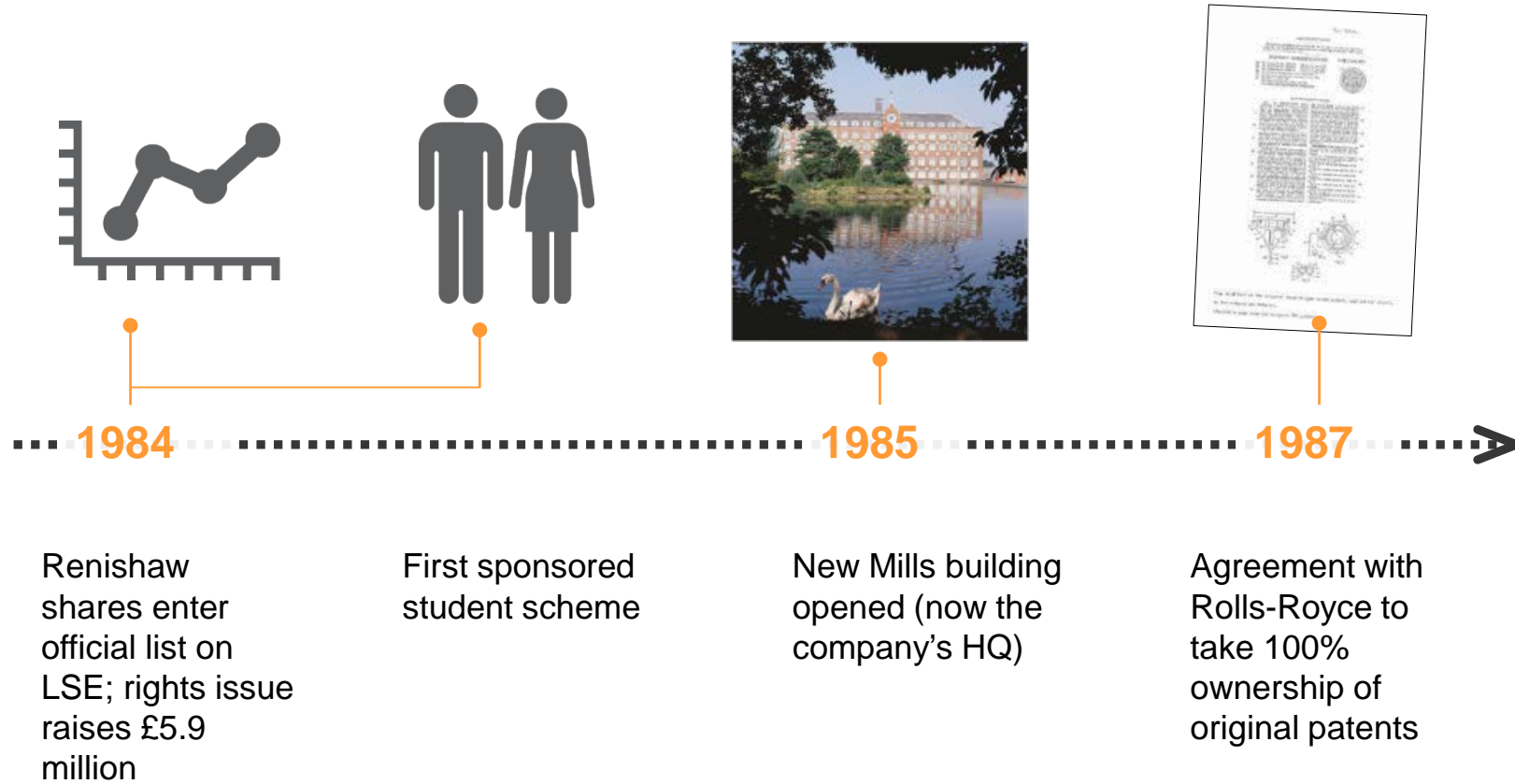
Sales reach £1 million (85% exports)

First Queen's award (Export Achievement)

David McMurtry joins company full-time, first apprentice recruited

First overseas manufacturing facility (Ireland), first sales subsidiary (USA)

# Our journey so far...

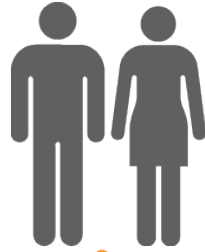


# Our journey so far...



1996

3 awards for  
RAMTIC  
production  
system



1997

1000 employees  
worldwide



2000

Worldwide sales  
reach £100 million



2001

David McMurtry  
receives knighthood  
'for services to  
design and  
innovation'

# Our journey so far...



2006

Purchase of itp GmbH



2011

UK Best Mid-Cap Business of the Year award (National Business Awards)



Miskin site purchased (South Wales)



# Our journey so far...



# Our journey so far...



2013

Created LBC Engineering GmbH following acquisition

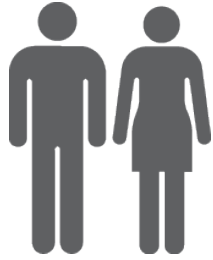
2014

17<sup>th</sup> Queen's Award for Enterprise, first outside metrology field (Raman spectroscopy)

Record 105 apprentices in training and intake of 68 graduates

Acquisition of ACE Engineering Inc

# Our journey so far...



2015

Over 4000 employees worldwide

Renishaw Innovation Centre opens at New Mills, UK

2016

The first Additive Manufacturing Solutions Centre opens in India

Healthcare Centre of Excellence opens in South Wales

# Our journey so far...



Renishaw Inc moves to new 133,000 sq. ft. office and warehouse facility

Worldwide annual sales reach £500 million

# Our performance in 2017

**£536.8 million**

sales

**4,530**

staff

**35**

countries with local subsidiary offices

**15%**

of revenue spent on R&D

## Sales by region

Far East	47%
Continental Europe	24%
Americas	21%
UK and Ireland	5%
Other regions	3%

## Staff by region

Far East	8%
Continental Europe	9%
Americas	7%
UK and Ireland	66%
Other regions	10%

## Sales by business unit

Metrology	94%
Healthcare	6%

# Now a global solution provider

We aim to provide leading-edge technology by encouraging innovation to address our customers' needs.

With subsidiary offices in over 70 locations across 35 countries, we support our customers locally before, during and after sales to build relationships with long term and lasting benefits.



*Thank you!*

For more information please visit:

**[www.renishaw.com](http://www.renishaw.com)**