

Introducing Renishaw plc



About Renishaw

World leading metrology company

A FTSE 250 company with headquarters in 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
Chairman & Chief Executive

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.



Highlights



Our strategy



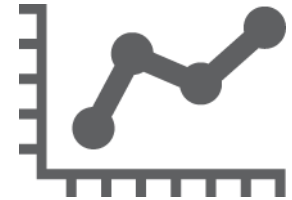
Continual research
creating strong
market positions
with innovative
products



Efficient high-
quality
manufacturing



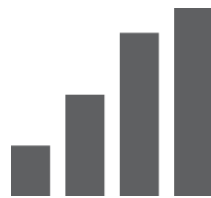
Strong market
presence and focus
on emerging
markets



Building the
business via
acquisition



Customer support



Consistent organic
growth



People



Focus on becoming
a solutions provider

Our customers



Aerospace



Agriculture



Automotive



Consumer products



Construction



Medical

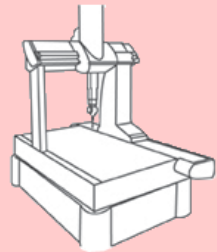


Power generation

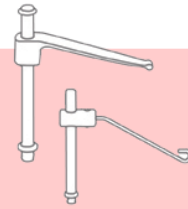


Quarrying and mining

Our expertise – Manufacturing process control



Co-ordinate
measurement
products

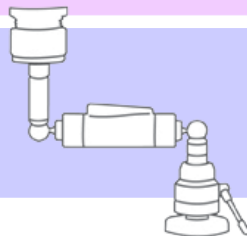


Fixtures

Gauging



Machine tool
probe and tool
setting systems



Calibration and
performance
testing products

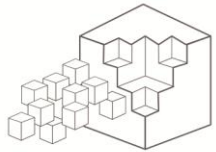
**Post-
process
monitoring**

In-process control

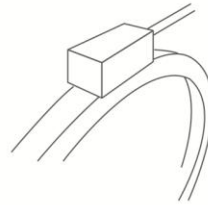
Process setting

Process foundation

Our expertise – Industrial metrology



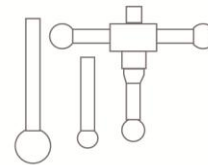
Additive
manufacturing



Motion control



Large scale
metrology and
surveying



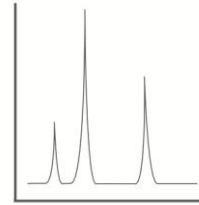
Styli for probe
systems



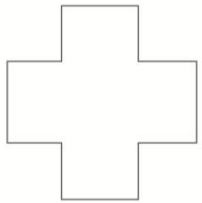
Our expertise – Healthcare



Dental scanners,
CAD software,
milling machines
and structures



Raman
microscopes and
analysis



Neurosurgical
planning
software,
implantables and
robotics



Diagnostic
systems for
clinical research



Our service, your solution



Hardware

End user retrofits



Customer training



Applications engineering



Custom turnkey solutions



Consultancy

Consumables supply



OEM fitment

Advanced products



Worldwide service & support

Software



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® , 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 32 countries with international backup



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

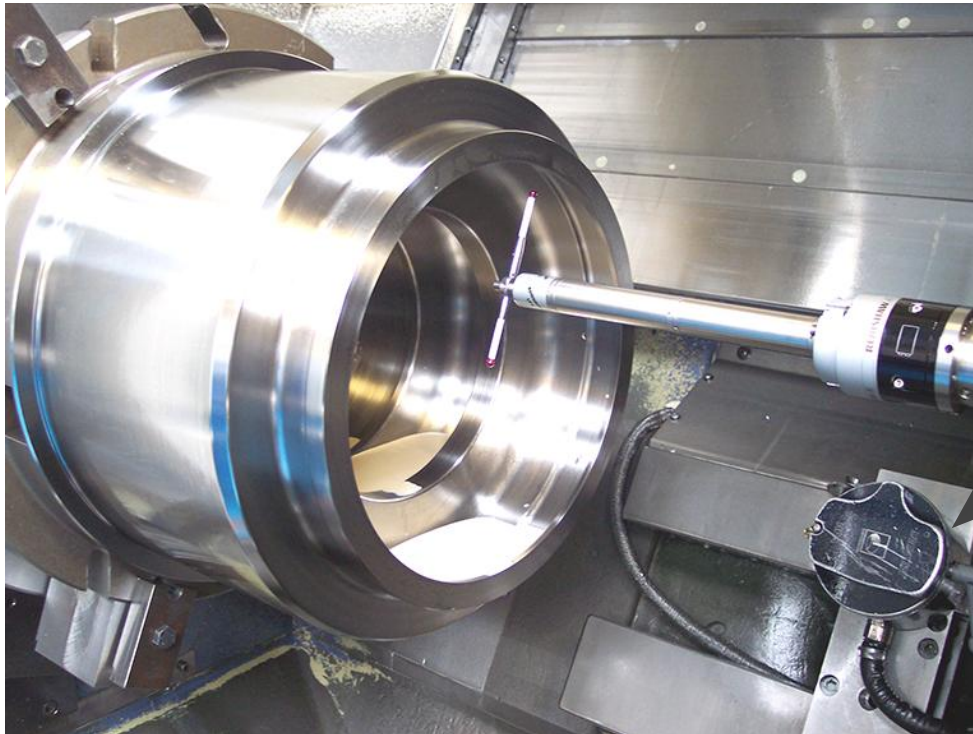
Conroe (USA)

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

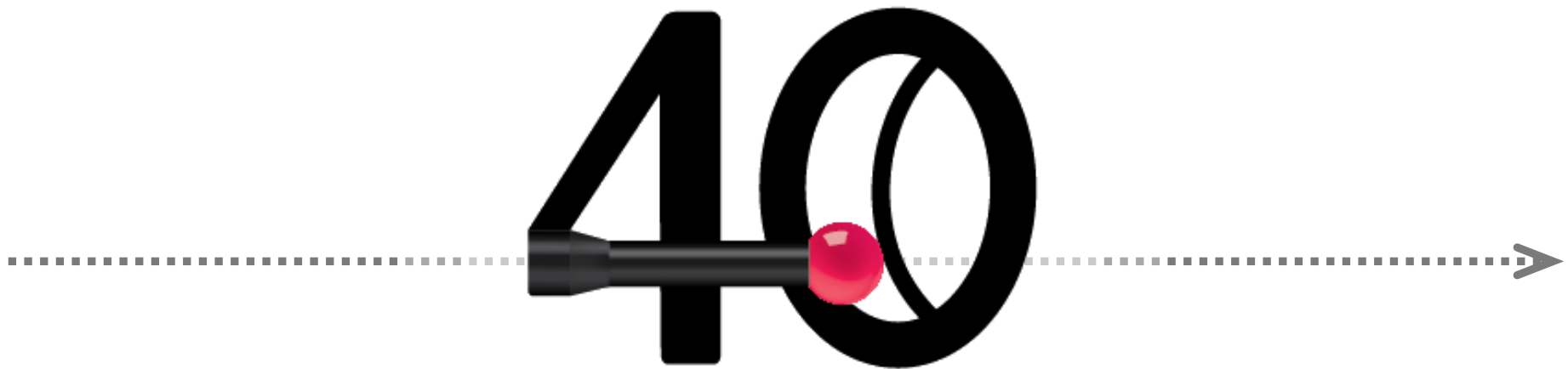
“We have a long term commitment to Research and Development, with annual spend historically between 14 and 18% of revenue. We also invest heavily to create our own distribution channels and are prepared to make acquisitions when we find companies with complementary technology and people.”

Geoff McFarland

Group Engineering Director



40 years of innovation



years of innovation
(1973-2013)

40 years of innovation



1972



1977



1987



David
McMurtry
invents first
touch-trigger
probe

First dedicated
probe for
machine tools

MAETRACE
digitising
software
released

Renishaw's
first laser
interferometer
system

40 years of innovation



1989

Renishaw's first range of encoder readheads and interfaces



1991

QC10 ballbar system



Raman microscope



1992

Cyclone scanning machine

40 years of innovation



1995



1997



2002



2005

HS10 laser
scale

PCMT process
control
software for
machine tools
released

Triclone 90
dental scanner

REVO five-axis
measurement
system

40 years of innovation



2007

Neurological
product line
established



2010

Investment in
laser
measurement
and survey
systems



2011

Gauging and
Additive
product lines



2013

Fixtures
product line

Vision

“Over the years, John Deer and I 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.”



Sir David McMurtry
Chairman & Chief Executive

Our journey so far...



1973

Renishaw
Electrical Ltd
registered

1976

First probe for
CMMs
commercially
available

1978

First patent
case fought
jointly with
Rolls-Royce

Our journey so far...



1979

Sales reach
£1 million
(85% exports)

First Queen's
award
(Export
Achievement)

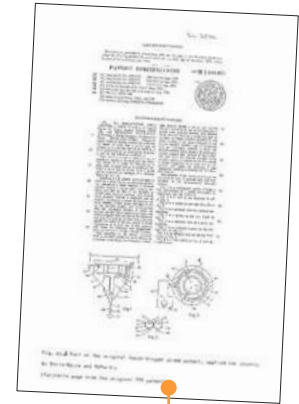
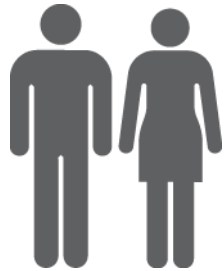
David McMurtry
joins company
full-time, first
apprentice
recruited

1981

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



Our journey so far...



1984

Renishaw shares enter official list on LSE; rights issue raises £5.9 million

First sponsored student scheme

1985

New Mills building opened (now the company's HQ)

1987

Agreement with Rolls-Royce to take 100% ownership of original patents

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



2010

Acquired initial
stake in
Measurement
Devices Ltd
(MDL)



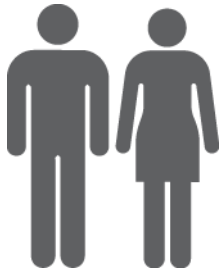
2011

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



Miskin site
purchased
(South Wales)

Our journey so far...



2012

3000
employees
worldwide

Worldwide
sales reach
£300 million

Woodchester
plant wins UK
Best Electronics
& Electrical Plant
award

R&R purchase

Our performance in 2013

£346 million

sales in 2013

3300

employees

32

countries with local subsidiary
offices

15%

of revenue spent on R&D in 2013

Sales by region

| | |
|--------------------|-----|
| Far East | 40% |
| Continental Europe | 28% |
| Americas | 23% |
| UK and Ireland | 6% |
| Other regions | 3% |

Employees by region

| | |
|--------------------|-----|
| Far East | 7% |
| Continental Europe | 8% |
| Americas | 6% |
| UK and Ireland | 71% |
| Other regions | 8% |

Sales by business unit

| | |
|------------|-----|
| Metrology | 92% |
| Healthcare | 8% |

Now a global solution provider

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



With subsidiary offices in 70 locations across 32 countries, we support our customers locally before, during and after sales to build relationships with long term and lasting benefits.

RENISHAW  [®]
apply innovation™