

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

Highlights

£536.8 million

sales in 2017

15%

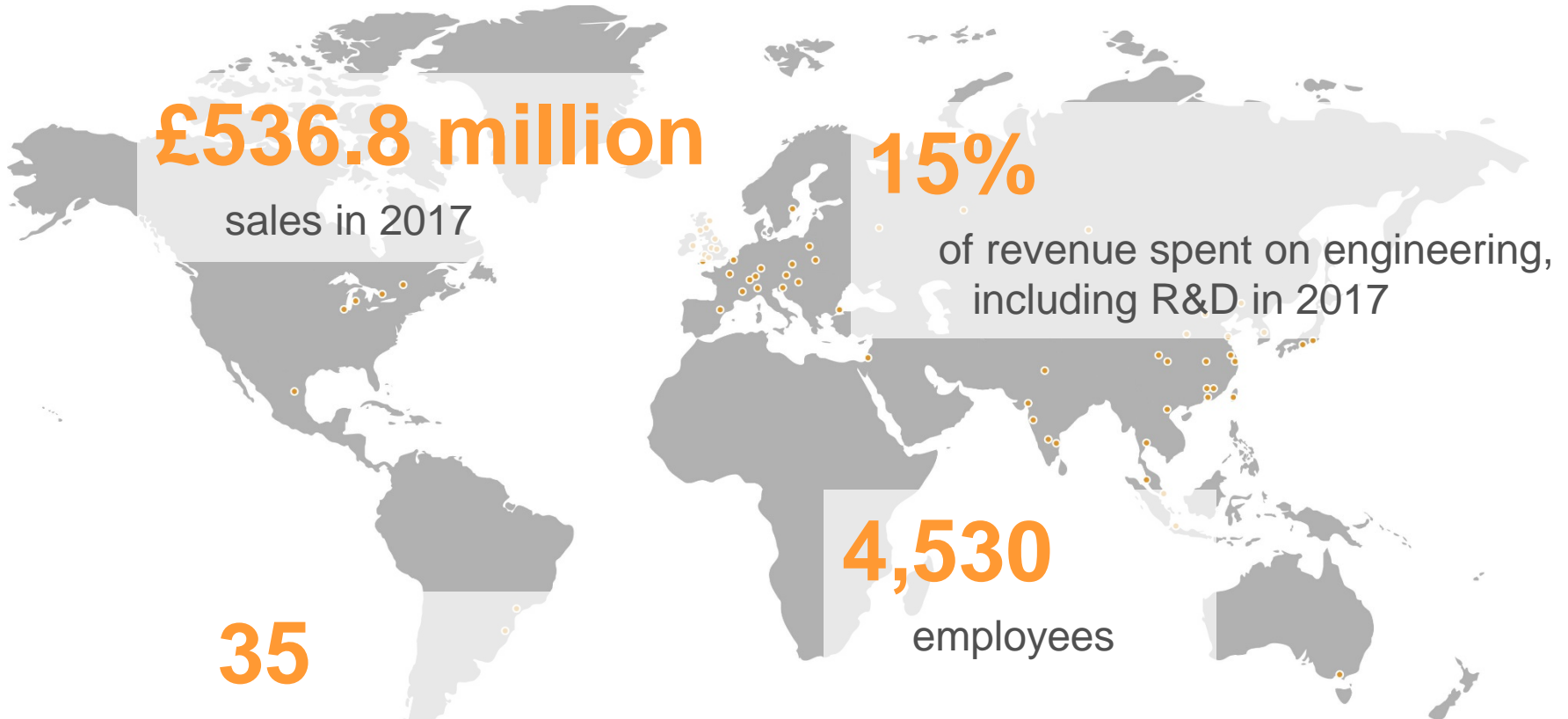
of revenue spent on engineering,
including R&D in 2017

35

countries with local
subsidiary offices

4,530

employees

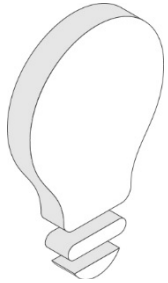


Securing growth for the long term

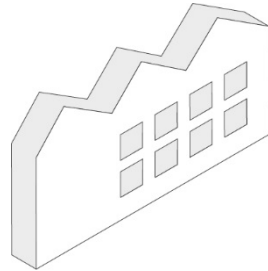
To assure success, we undertake as many of our core activities as possible, including design, manufacturing, sales and support.



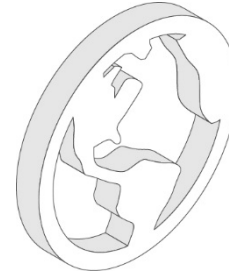
Our strategy



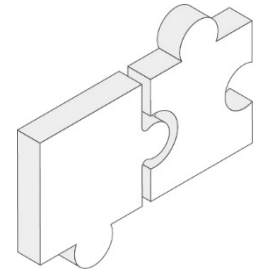
Continual research
creating strong
market positions with
innovative products



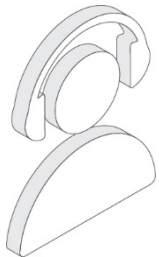
Efficient high-quality
manufacturing



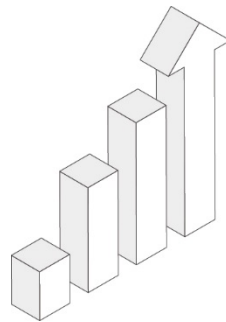
Strong market
presence and focus
on emerging
markets



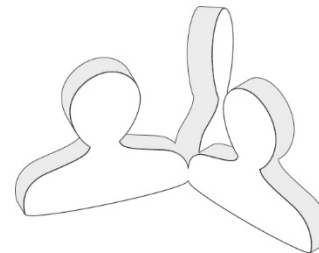
Building the
business via
acquisition



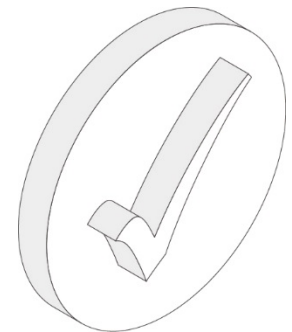
Customer support



Consistent organic
growth



People



Focus on becoming
a solutions provider

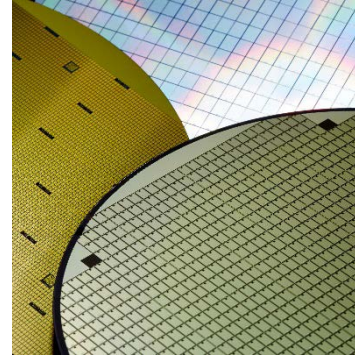
Our customers



Aerospace



Automotive



Electronics



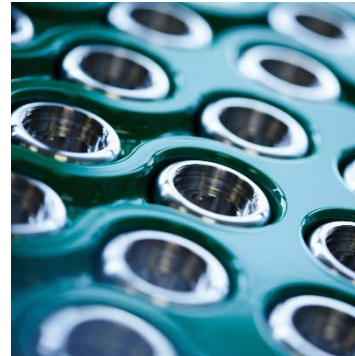
Energy



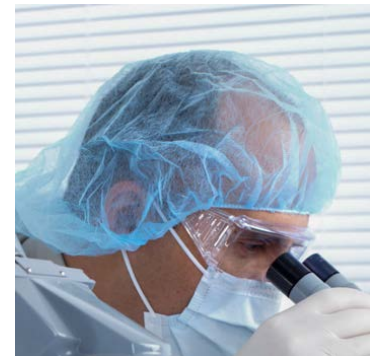
Heavy industry



Medical and
healthcare

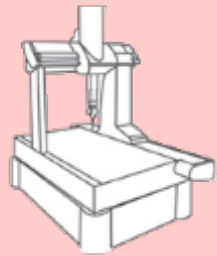


Precision
manufacturing

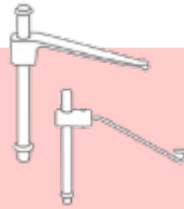


Scientific,
research and
analysis

Our expertise – Manufacturing process control



Co-ordinate
measurement
products



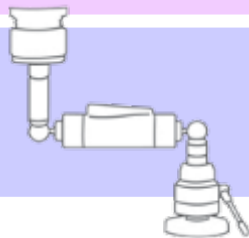
Metrology
fixtures



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



CMM probes, software
and retrofits



Machine tool probes
and software



Automated gauging
systems



Machine calibration and
optimisation



Styli for probes

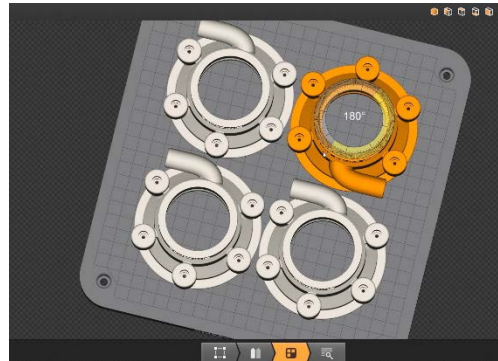


Metrology fixtures

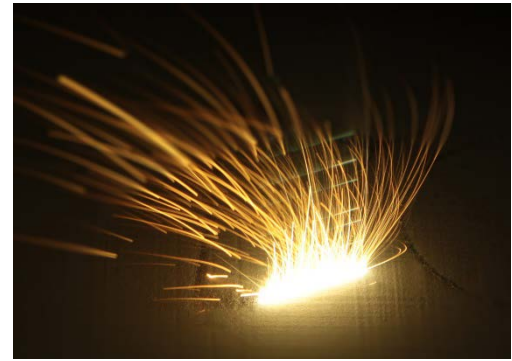
Our expertise – Additive manufacturing



Systems

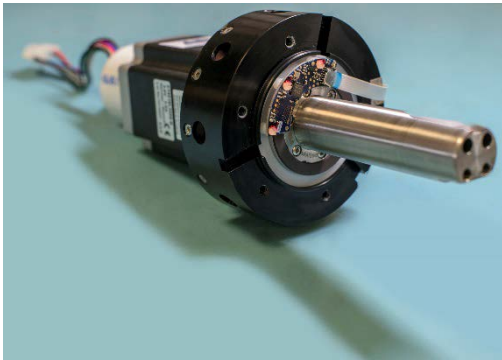


Software

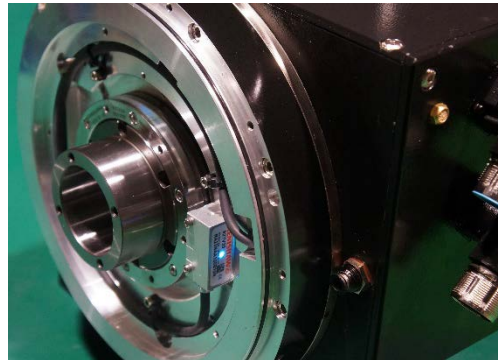


Solutions centres

Our expertise – Position encoders



Magnetic



Optical

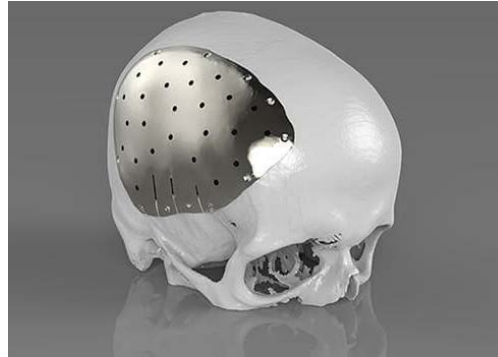


Laser

Our expertise – Healthcare



Neurological products
and therapies



Cranial, maxillofacial
and dental products



Raman spectroscopy

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 35 countries with international backup



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



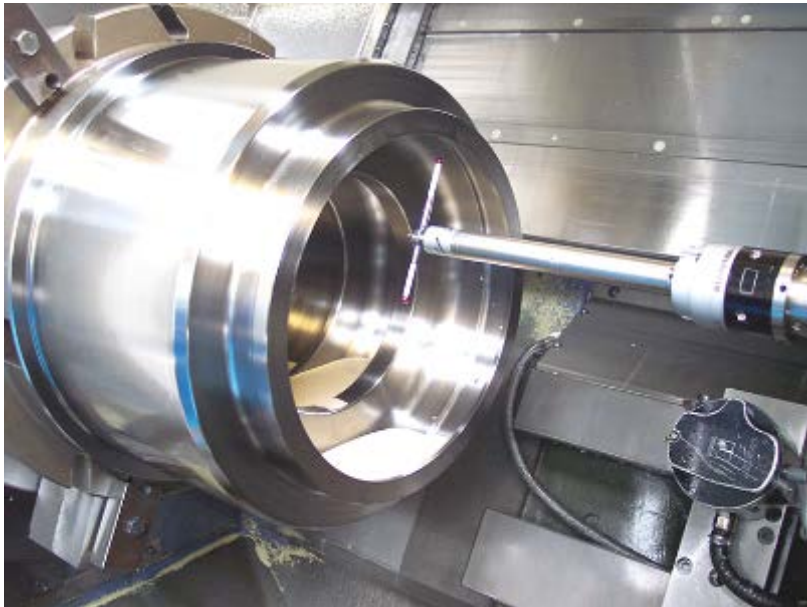
Conroe (USA)

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 out-standing. //

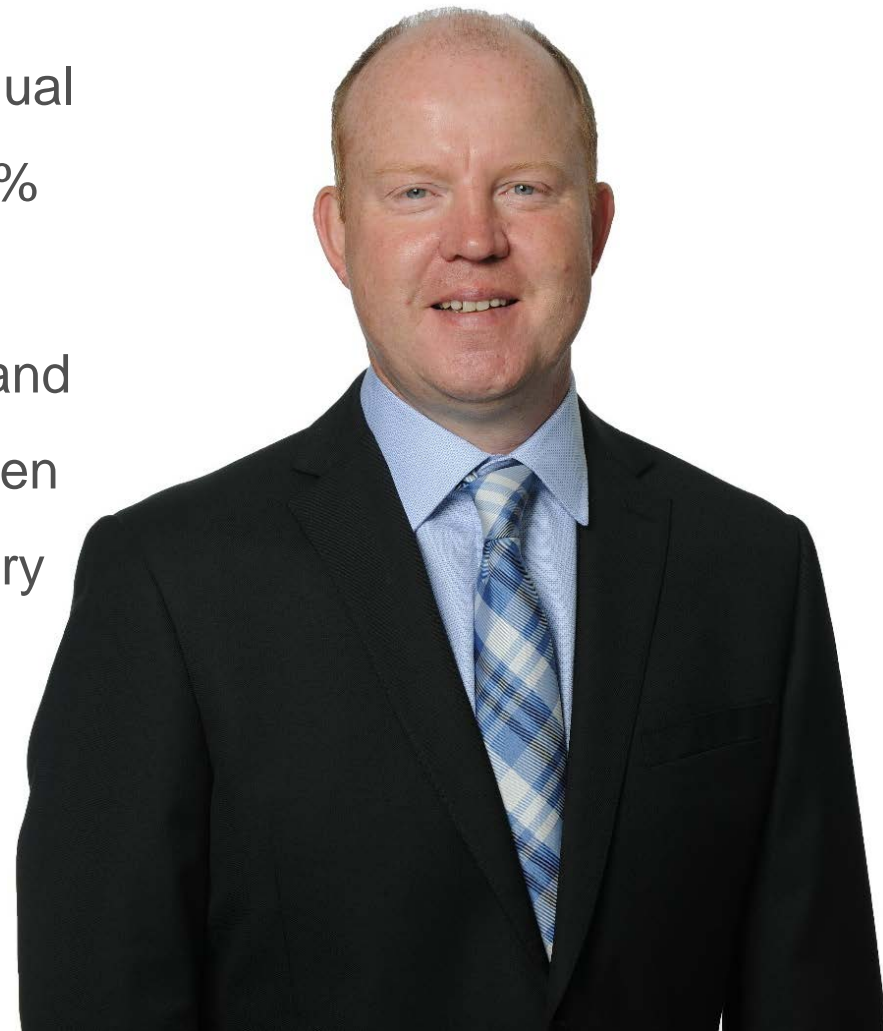
Castle Precision (UK)

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



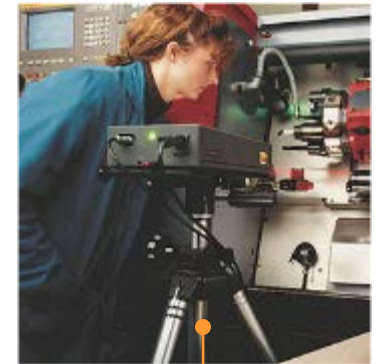
1972



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

Over 40 years of breakthrough innovation



1989

Renishaw's first range of encoder readheads and interfaces



1991

QC10 ballbar system



Raman microscope



1992

Cyclone scanning machine

Over 40 years of breakthrough 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

Over 40 years of breakthrough innovation



2007

Neurological
product line
established



2011

Gauging and
additive
manufacturing
product lines

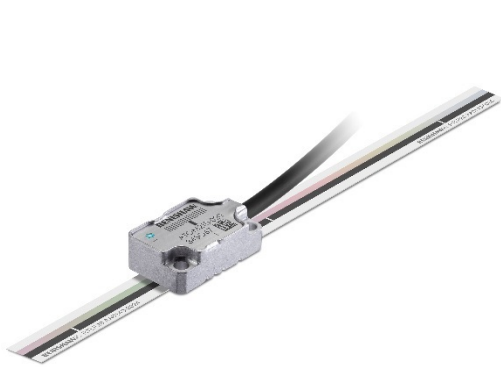


2013

Fixtures
product line



Over 40 years of breakthrough innovation



2014

ATOM™
miniature
position
encoder



2015

RVP non-
contact vision
probe for
REVO-2



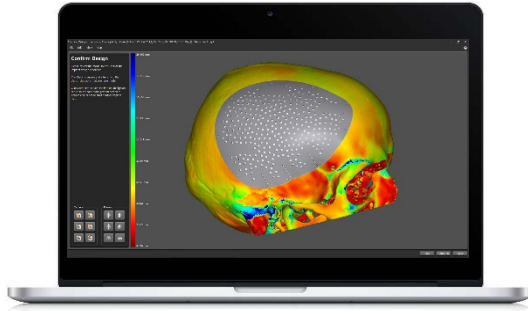
2016

inVia™
Qontor®
confocal
Raman
microscope



XM-60 multi-axis
calibrator system

Over 40 years of breakthrough innovation



2017

ADEPT software for
craniomaxillofacial
implant design

IPC Intelligent
Process Control
software

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)

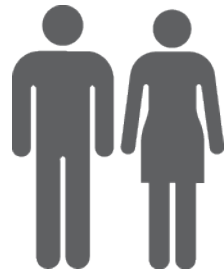
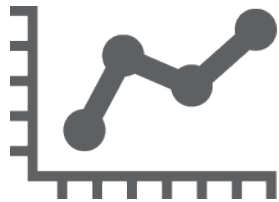
First Queen's
award
(Export
Achievement)

1981

David McMurtry
joins company
full-time, first
apprentice
recruited

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



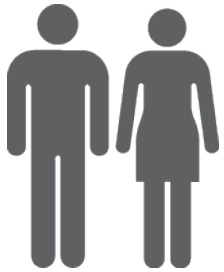
2011

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 journey so far...



2013

Created LBC Engineering GmbH following acquisition

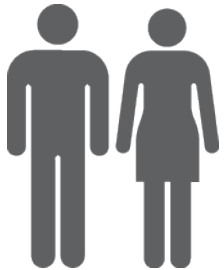
2014

17th 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...



2017

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 in 2017

4,530

Employees

35

countries with local subsidiary
offices

15%

of revenue spent on R&D in 2017

Sales by region

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

Employees 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.

RENISHAW  [®]
apply innovation™