

OUR  
BUSINESS

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# GLOBAL PURCHASING BUSINESS REVIEW

> MAY 2018



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ONE COMPANY PROMISE

EXPERIENCES  
CUSTOMERS  
LOVE, FOR LIFE

TWO GLOBAL ICONIC BRANDS



THREE PASSIONS

MORE GREAT  
PRODUCTS,  
FASTER

CUSTOMER  
FIRST

ENVIRONMENTAL  
INNOVATION

FOUR  
FOUNDATIONS

ENGAGED,  
PASSIONATE  
PEOPLE

TRANSFORMED  
COST STRUCTURE

BUSINESS  
EXCELLENCE

GLOBAL  
GROWTH

FIVE CORE  
VALUES

INTEGRITY, PIONEERING, EXCELLENCE, UNITY AND RESPONSIBILITY  
Our most valuable asset is out people, nothing is more important than their safety and wellbeing

Built around two iconic brands with a wonderfully rich heritage.

Formed in 2008, when Tata purchased Jaguar Cars and Land Rover from Ford Motor Company.

Headquartered in the UK and the largest premium automotive business there.

- India's largest, most respected business group for more than 140 years
- Operations in over 100 countries, across 6 continents in 8 business sectors
- >600,000 employees worldwide
- Each Tata Group company independently managed by own Board of Directors
- Group revenue and market capitalisation over US \$100 billion
- International revenue 67% of Group revenue



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**Dr Ralf Speth**  
CEO Jaguar Land Rover



**Ian Harnett**  
Executive Director Human  
Resources and Global  
Purchasing



**Felix Brautigam**  
Chief Commercial  
Officer



**Grant McPherson**  
Director of Quality  
and Automotive  
Safety



**Hanno Kirner**  
Executive Director,  
Corporate and Strategy



**Wolfgang Stadler**  
Executive Director,  
Manufacturing



**Ken Gregor**  
Chief Financial  
Officer



**Pan Qing**  
Executive Director  
Jaguar Land Rover  
China



**Nick Rogers**  
Executive Director  
Product Engineering



**Phil Hodgkinson**  
Director of Global  
Business Expansion



**Gerry McGovern**  
Chief Design Officer  
for  
Land Rover



**Keith Benjamin**  
Group Legal  
Director



**Fiona Pargeter**  
Head of Global PR  
Communications



**Ian Callum**  
Director of Design  
Jaguar



**John Edwards**  
Managing Director  
Special Operations



## LEADING PREMIUM AUTOMOTIVE BUSINESS IN THE UK

The **only** volume manufacturer of luxury vehicles in the UK

The **largest** investor in automotive R&D and engineering in the UK

## A MAJOR PROVIDER OF HIGHLY SKILLED JOBS IN THE UK

The largest automotive employer in the UK

Supports up to **240,000** people through the supply chain, dealer network and wider economy

Recruited **25,000** people since 2010

## ONE OF THE UK'S LARGEST EXPORTERS BY VALUE

Almost **80%** of production exported from three plants in the UK

## LED BY ADVANCED DESIGN, ENGINEERING AND TECHNOLOGY

A world-class team with more than **11,000** engineers and designers

Investing in an advanced research facility together with Warwick Manufacturing Group and TMETC at University of Warwick to accelerate innovation

**£1billion** investment in state-of-the-art advanced engine facility

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**43,000**

people globally

**11,000**

engineers and designers globally

**160**

global awards won in 2017

**129**

countries with sales networks

**14**

vehicle lines

**7**

vehicle assembly plants

**2**

engine manufacturing centres



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# 1922

Jaguar Cars started in 1922, when the Swallow Side Car company was founded



# 1948

First Land Rover was produced in 1948, in Solihull

## 2017 FULL YEAR SALES

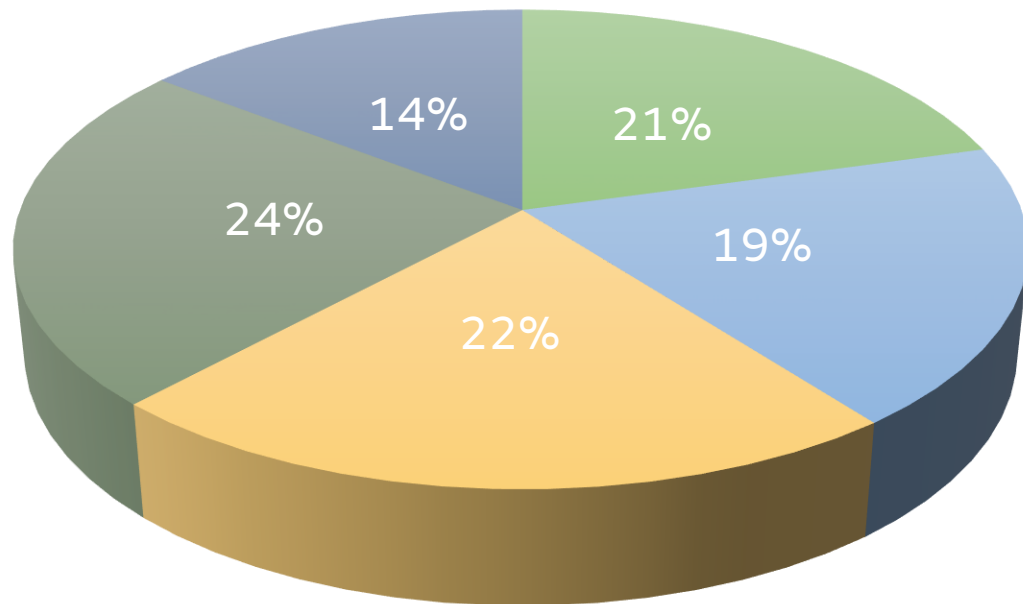
621,109

7% sales increase, year-on-year

Sales have more than tripled since 2009

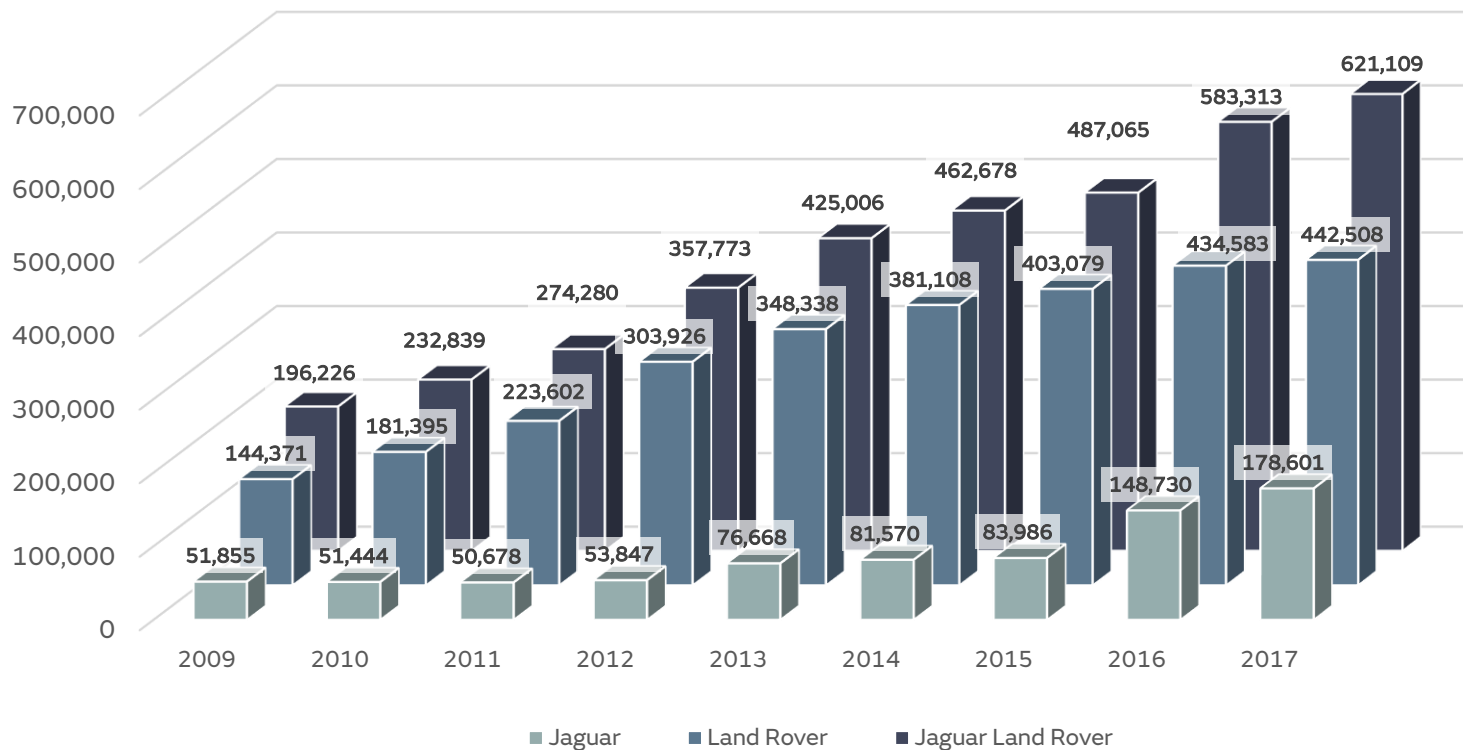
Record performances in China, US and UK

Record performances for Jaguar and Land Rover



■ North America ■ UK ■ Europe ■ China Region ■ Overseas

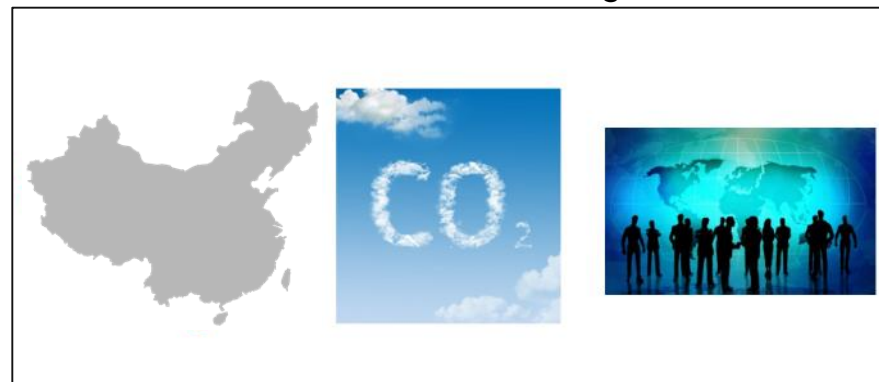
# SUSTAINED SALES GROWTH



## Economic Challenges



## Globalisation Challenges



## Legislation Challenges

	UNITED STATES	EUROPE	CHINA
2016	Fuel Economy fines No usage restrictions	City bans by emissions level	Diesel banned in Beijing PHEV / EV incentivised by registration limits
2020	Minimum quota of fleet as PHEV / EV	ULEV City Zones & usage restrictions	
2025		ZEV only in major cities & some countries (Norway, Holland etc)	High risk of ICE Bans in major cities
2050	8 states committed to ban ICE vehicle usage	ICE vehicle sales banned across Europe	

## Market Challenges

Social	Customer Sophistication	Digitalisation	Disruption / Competitive Arena	Geopolitical Landscape
Digital & Technological	<ul style="list-style-type: none"> <li>Informed</li> <li>Personalised</li> <li>Environmentally conscious</li> <li>Vehicle ownership changing towards usage based</li> </ul>	<ul style="list-style-type: none"> <li>New digital channels</li> <li>Product complexity driven by electronics</li> <li>Car embedded into larger ecosystem, e.g. connected car ADAS</li> </ul>	<ul style="list-style-type: none"> <li>New OEM and non-traditional entrants, e.g. technology firms</li> <li>Disruptive industry business models</li> <li>NEV</li> </ul>	<ul style="list-style-type: none"> <li>Wealth distribution towards East</li> <li>Urbanisation</li> <li>Regulatory shift, against I.C.E.</li> </ul>
Economic				
Environmental				
Political				
Legal				
Competitive				

The external factors drive four overarching major trends that need to be addressed by OEMs

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## BREXIT

### Issues



Tariffs levied on trade



Customs borders imposed



Migration restrictions



Regulatory change

### Actions

#### 1. INFLUENCING



#### 2. PREPARING THE BUSINESS

#### 3. TAKING EVASIVE ACTION



## USA

### MAIN ISSUE:

Trade Policy = Uncertain

- Border Adjustment tax?
- NAFTA?
- "Big border tax"?



### Opportunity:

Exchange Rate



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## XF SPORTBRAKE

Jaguar grace, pace and space for the 21st Century.

## XF

A fusion of sports car styling with outstanding comfort.

## XE

The most advanced, efficient and refined sports saloon that Jaguar has ever produced.

## XJ

A dramatic combination of beauty, luxury and power.



The first step towards  
the future.

## F-PACE

A performance crossover from Jaguar for those who love driving.

## E-PACE

A seriously smart compact SUV, designed and engineered to be beautiful, fun and clever.

## F-TYPE

A true Jaguar sports car - powerful, agile and distinctive.

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**XE**

The most advanced, efficient and refined sports saloon that Jaguar has ever produced.



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XF

A fusion of sports car styling with outstanding comfort.



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**XFL**

Developed exclusively for China, unparalleled passenger luxury and technology.



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# XF SPORTBRAKE

Jaguar grace, pace and space for the 21st Century.



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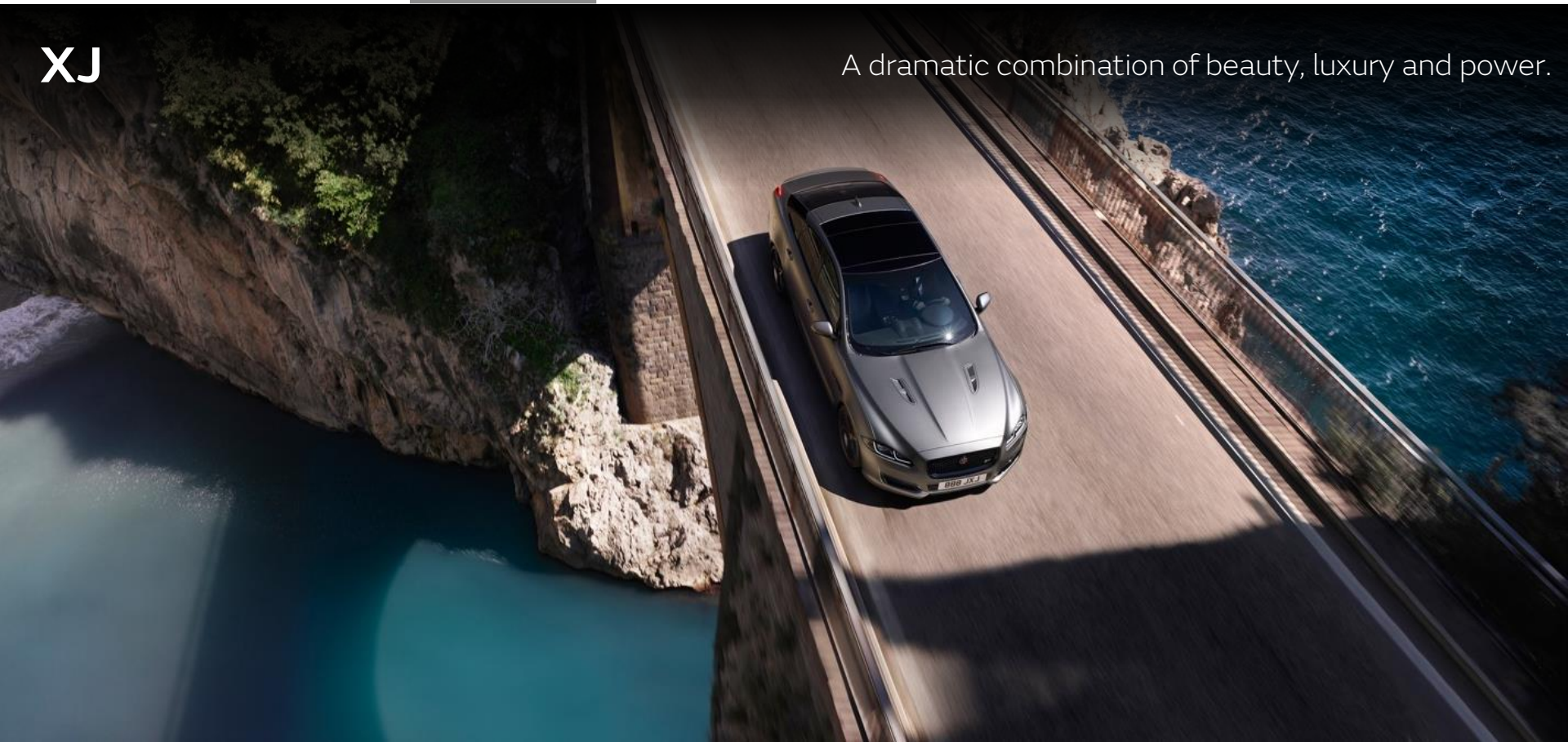
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XJ

A dramatic combination of beauty, luxury and power.



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# F-TYPE

A true Jaguar sports car - powerful, agile and distinctive.



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# E-PACE

A seriously smart compact SUV, designed and engineered to be beautiful,  
fun and clever.



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# F-PACE

A performance crossover from Jaguar for those who love driving.



**WINNER**  
WORLD CAR AWARDS

2017 WORLD CAR DESIGN OF THE YEAR



**WINNER**  
WORLD CAR AWARDS

2017 WORLD CAR OF THE YEAR

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# I-PACE



GRANARY  
SQUARE NIC

The first step towards our future.

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ABOVE & BEYOND

## DISCOVERY

The best family SUV in the world, with unrivalled capability and technology.

## DISCOVERY SPORT

The first in a new generation of Land Rover SUV design.



## RANGE ROVER EVOQUE

Distinctive and individual, a true Range Rover in compact form.



## RANGE ROVER VELAR

The first vehicle of its kind; another pioneer, exploring the frontier for luxury SUVs.



## RANGE ROVER SPORT

The most agile and dynamic Land Rover.



## RANGE ROVER

The pinnacle of refined capability.

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# DISCOVERY SPORT

The first in a new generation of Land Rover SUV design.



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# DISCOVERY

The best family SUV in the world,  
with unrivalled capability and technology.



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# RANGE ROVER EVOQUE

Distinctive and individual,  
a true Range Rover in compact form.



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# RANGE ROVER EVOQUE CONVERTIBLE

Land Rover's latest luxury convertible SUV.



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# RANGE ROVER VELAR

The first vehicle of its kind; another pioneer,  
exploring the frontier for luxury SUVs.



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# RANGE ROVER SPORT

The most agile and dynamic Land Rover.



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# RANGE ROVER

The pinnacle of refined capability.



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# UK MANUFACTURING AND PRODUCT DEVELOPMENT



## GLOBAL INVESTMENT IN INFRASTRUCTURE



## WORLDWIDE LOCATIONS

### UNITED KINGDOM

1. Global HQ, Engineering and Design, Whitley
2. Engineering, Design and Test Facility, Gaydon
3. Manufacturing Facility, Halewood
4. Manufacturing Facility, Solihull
5. Manufacturing Facility, Castle Bromwich
6. Manufacturing Facility, Wolverhampton
7. National Automotive Innovation Centre, Warwick
8. Special Vehicle Operations Technical Centre, Ryton
9. Engineering and Operations, Fen End

### INTERNATIONAL

1. Chery Jaguar Land Rover, Changshu, China
2. Manufacturing Facility, Itatiaia, Brazil
3. Assembly Facility, Pune, India
4. Manufacturing Facility, Nitra, Slovakia
5. Contract Manufacturing, Graz, Austria
6. New R&D centre in Shannon, Ireland

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# GLOBAL INVESTMENT IN INFRASTRUCTURE



We currently  
operate in **129**  
countries



Our global network  
currently stands at  
over **2,690**  
retailers



By **2020** this is  
forecast to increase  
to **3,500**



By **2020** we will  
increase worldwide  
warehouse capacity  
**by 50%** to support  
parts availability

## GAYDON VISION

- Major infrastructure renewal
- Consolidating Production Purchasing and programme teams into single location and co-location of Jaguar Design alongside Land Rover Design
- A New NVH technology centre
- Occupation from the end of 2018
- c£450m investment programme



## WHITLEY POWERTRAIN TEST CENTRE

- Creation of new propulsion engineering & testing capability at Whitley
- 6 test 'wings' oriented around a central spine
- c£250m investment
- First capability live in 2018



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## FEN END – VEHICLE OPERATIONS

Opening in 2017, a new vehicle operations centre at Fen End, Warwickshire to prepare and refine vehicles for global events and product launches

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# NATIONAL AUTOMOTIVE INNOVATION CENTRE, WARWICK

Total investment: £150m



The National Automotive Innovation Centre (NAIC) will open in 2018.

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# SPECIAL VEHICLE OPERATIONS TECHNICAL CENTRE RYTON

Total investment: £20m



Global centre of excellence for the creation of high-end luxury bespoke and extreme performance vehicles.

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# ENGINEERING & OPERATIONS FEN END

Total investment: £65m

The new home of Jaguar Land Rover's skilled vehicle operations team.

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# ASSEMBLY FACILITY PUNE, INDIA



## PUNE ASSEMBLY PLANT



Inaugurated in 2011 and building both Jaguar and Land Rover models for the Indian market.

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# MANUFACTURING PLANT ITATIAIA, BRAZIL

Total investment: £240m



New manufacturing facility in Rio De Janiero, Brazil opened in June 2016.

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# MANUFACTURING PLANT NITRA, SLOVAKIA

Total investment: £1bn



New manufacturing facility in Slovakia, opening in late 2018.

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# CHERY JAGUAR LAND ROVER CHANGSHU, CHINA

Total investment: £1bn



Joint venture in China - currently producing Range Rover Evoque, Discovery Sport, Jaguar XFL and XEL exclusively for the Chinese market.

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# CONTRACT MANUFACTURING GRAZ, AUSTRIA

Over 100 years of experience in vehicle production and contract manufacturing, creating Jaguar I-PACE and E-PACE.

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# SOFTWARE ENGINEERING CENTRE SHANNON, IRELAND



Jaguar Land Rover has confirmed plans to open a software engineering centre and create 150 jobs in Ireland, in 2018.

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We are developing both fully and semi-autonomous vehicles.

In 2017 we tested some of these technologies, as part of the UK AutoDrive project.

A Jaguar Land Rover intelligent vehicle will become a reality within the next 10 years.

But, being Jaguar Land Rover, we still think about people who love driving. Our customers want to experience the excitement of our products and must still take control when they want to.



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From 2020 all new Jaguar Land Rover vehicles will be electrified, giving our customers even more choice.

Jaguar Land Rover is working towards a cleaner future, with ultra-clean diesels and petrol engines, BEVs, PHEVs and MHEVs all in its strategic plans.

The Jaguar I-PACE concept is the first all-electric Jaguar.

# ELECTRIFICATION



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2017/18: After an incredible debut season the team now switches its focus onto season four, beginning in Hong Kong this December. With new cities added to the schedule, and with the unveiling of the new I-TYPE 2, Jaguar's second year of racing promises to be the best one yet.

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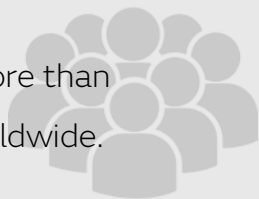
Jaguar Land Rover employs  
more than **11,000** engineers  
and designers.



Since 2010 more than **25,000** new  
people have joined our business,  
bringing with them a wealth of  
expertise and experience.



We now employ more than  
**43,000** people worldwide.



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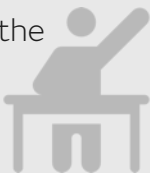
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**2 million** young people across the world given an introduction to engineering by 2020.



 **300,000** young people engaged in the UK this year alone.

More than **1,150** students “earning and learning” in our apprenticeship programme.



 More than **1,400** graduates have joined our two-year graduate programme over the last five years.



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We are proud to have signed up to  
the **Armed Forces Corporate  
Covenant** in July 2014.



We want to be the **employer of  
choice** for ex-armed forces  
personnel.

Since 2013 we have hired **over 200  
veterans**.

Jaguar Land Rover is presenting  
partner and proud sponsor of  
the **Invictus Games**,  
Toronto 2017,  
Orlando 2016 and London 2014.



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We are a responsible business that goes beyond world-class cars.

One team working together to apply passion, skills and technology to improve people's lives...



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## Worldwide programmes using Technology for Good...

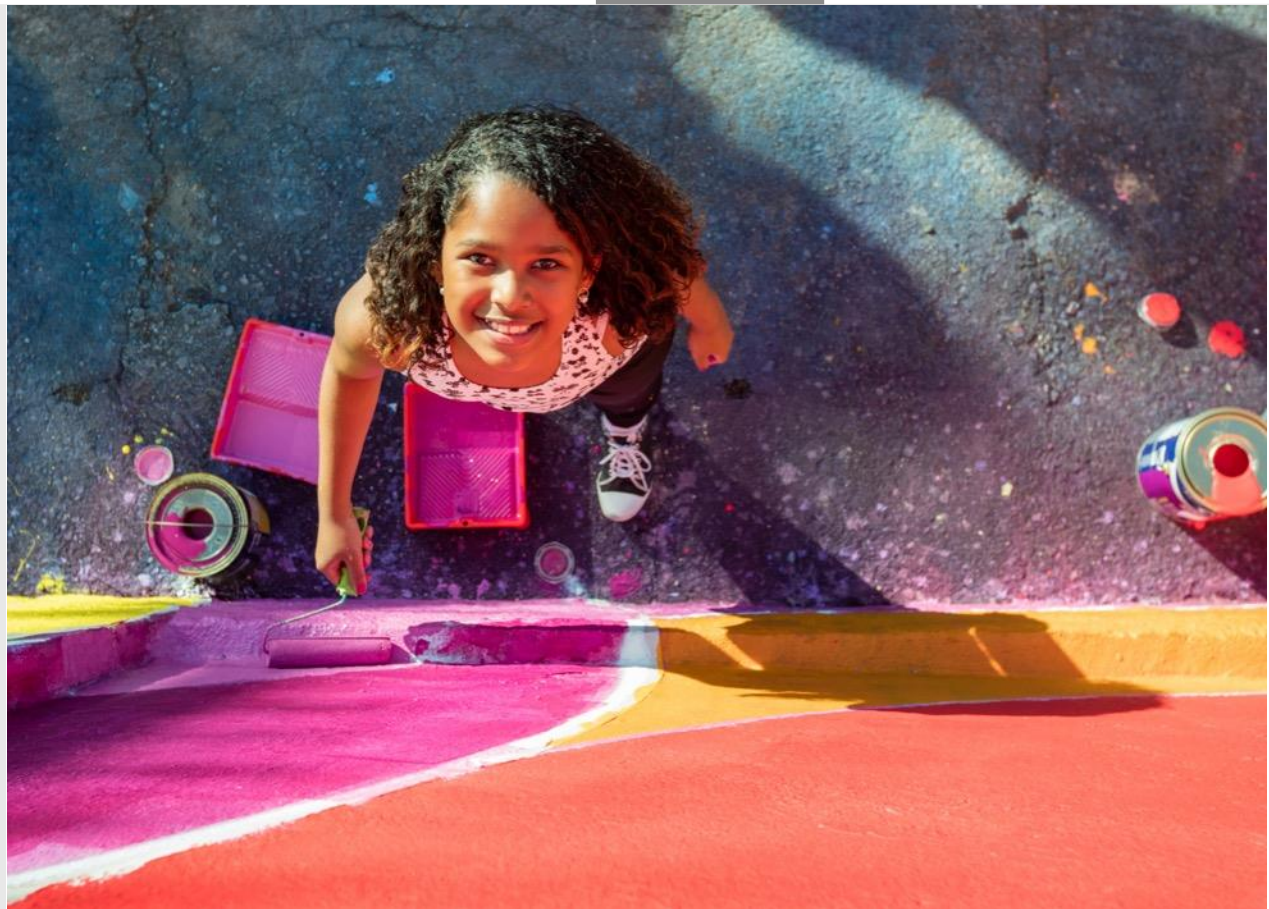
Changing the lives of 1.2million people in Kenya with our **Lighting Up Lives** solar project.

Pioneering the future of search and rescue with **Project Hero**, a specialist Discovery created in partnership with the Red Cross.

Creating life changing engineering solutions for people with disabilities with our **graduate volunteering scheme**.

Enabling 300,000 children to have access to clean drinking water through our **LifeStraw** water for schools project.

Promoting renewable energy to children around the world with our Formula E **Maths in Motion** challenge.



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# OUR FUTURE

- > EXPANDING INTO AND DEFINING NEW PRODUCT SEGMENTS
- > DRIVING INNOVATIVE TECHNOLOGIES
- > MORE THAN £4 BILLION INVESTMENT IN 2017/18
- > INTERNATIONAL EXPANSION
- > CONTINUING SUSTAINED, PROFITABLE GROWTH



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# THANK YOU

Name Surname

Job title (second level text)

M +44(0)0000 000 000

T +44(0)0000 000 000

name.surname@jaguarlandrover.com

JAGUAR LAND ROVER

W/1/26 Abbey Road, Whitley

Coventry CV3 4LF, UK

[jaguarlandrover.com](http://jaguarlandrover.com)

