



**Rolls-Royce**

## **Key Position in the Market 2007**



*Asia-Pacific weeks September 2007*

*Urban Transport & Mobility Event*



# Rolls-Royce – Vision



**„To be a world-leading power systems business, meeting the needs of our customers, shareholders and employees for the next century.“**



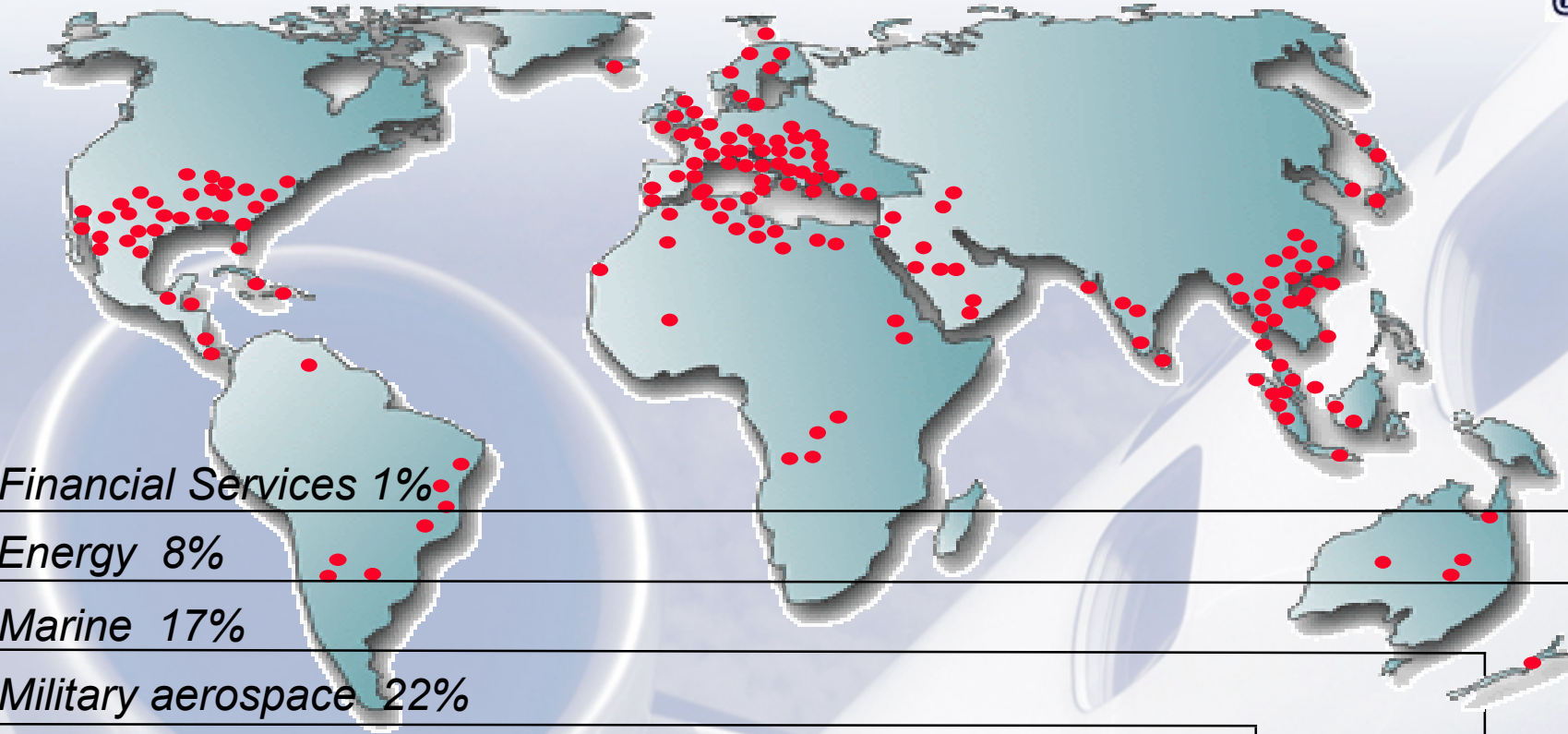
# Rolls-Royce worldwide

- Turnover > € 10.6 billion (€ 7.4 billion)
- Profit before tax > € 1 billion (€ 705 million)
- Order book > € 37.3 billion (€ 26.1 billion)
- Employees worldwide 38,000
- Main locations Great Britain, USA, Germany, Scandinavia





# Global Business



**Turnover € 9.4 billion**

*Financial Services 1%*

*Energy 8%*

*Marine 17%*

*Military aerospace 22%*

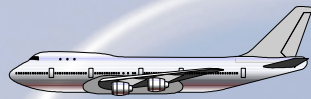
*Civil aerospace 52%*



# Rolls-Royce growth – Increasing Applications



## 25 years ago



Boeing 747



Lockheed L-1011



Boeing 757



Fokker F28



Gulfstream III

## Today



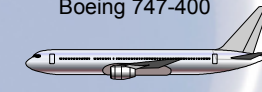
Boeing 787



Boeing 777



Boeing 747-400



Boeing 767-300ER



Boeing 757



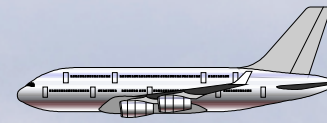
Boeing 727RE



Gulfstream 300/400



CitationJet



Airbus A380



Airbus A340-500/600



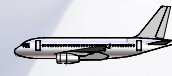
Airbus A330



Airbus A321



Airbus A320



Airbus A319



Gulfstream 500/550



SJ30



Tupolev Tu-204



MD-90



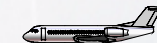
Boeing 717



CRJ Legacy



Fokker 100



Fokker 70



Global Express



Raytheon Premier 1



L-100



IPTN N-250



SAAB 2000



EMB-RJ140



EMB-RJ145



EMB-RJ135



Citation CJ1/CJ2



Light turboprops



Light helicopters



# Rolls-Royce – International customer base



- Rolls-Royce provides power for 9 of the world's top ten largest airlines

- 600 Airline customers worldwide

# What does influence the future of our Business?



Development of low cost economies



Cost of Raw Materials



Exchange rates

Emergent technology – products and manufacturing



Instant maturity for Customers



Corporate Responsibility



High Oil prices



Flawless execution for Quality & Delivery

New market opportunities



Ever-decreasing timescales for product development



# Rolls-Royce and Asia

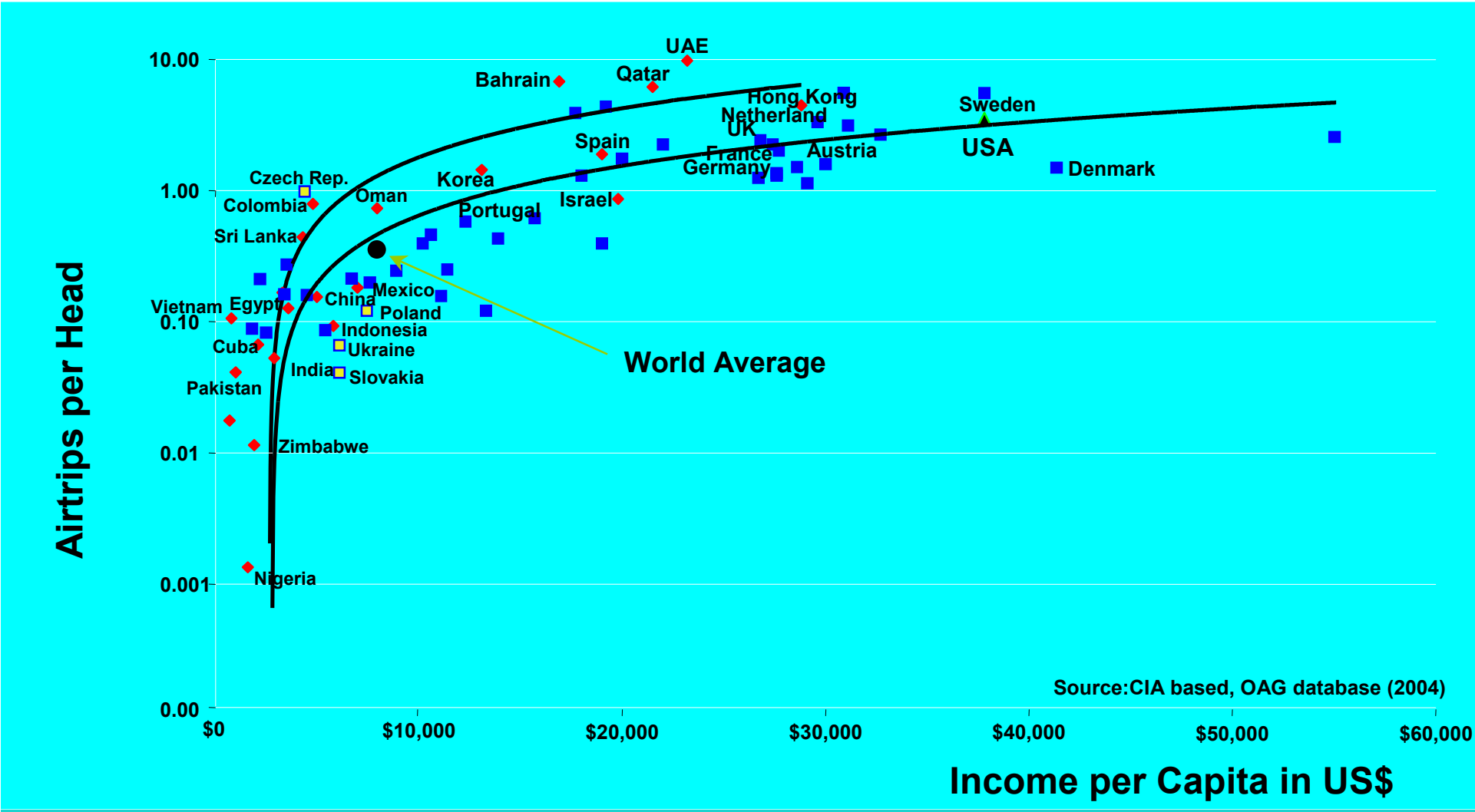






# Income & Flying

Asia and Eastern Europe potentially become major Aerospace Markets in the future

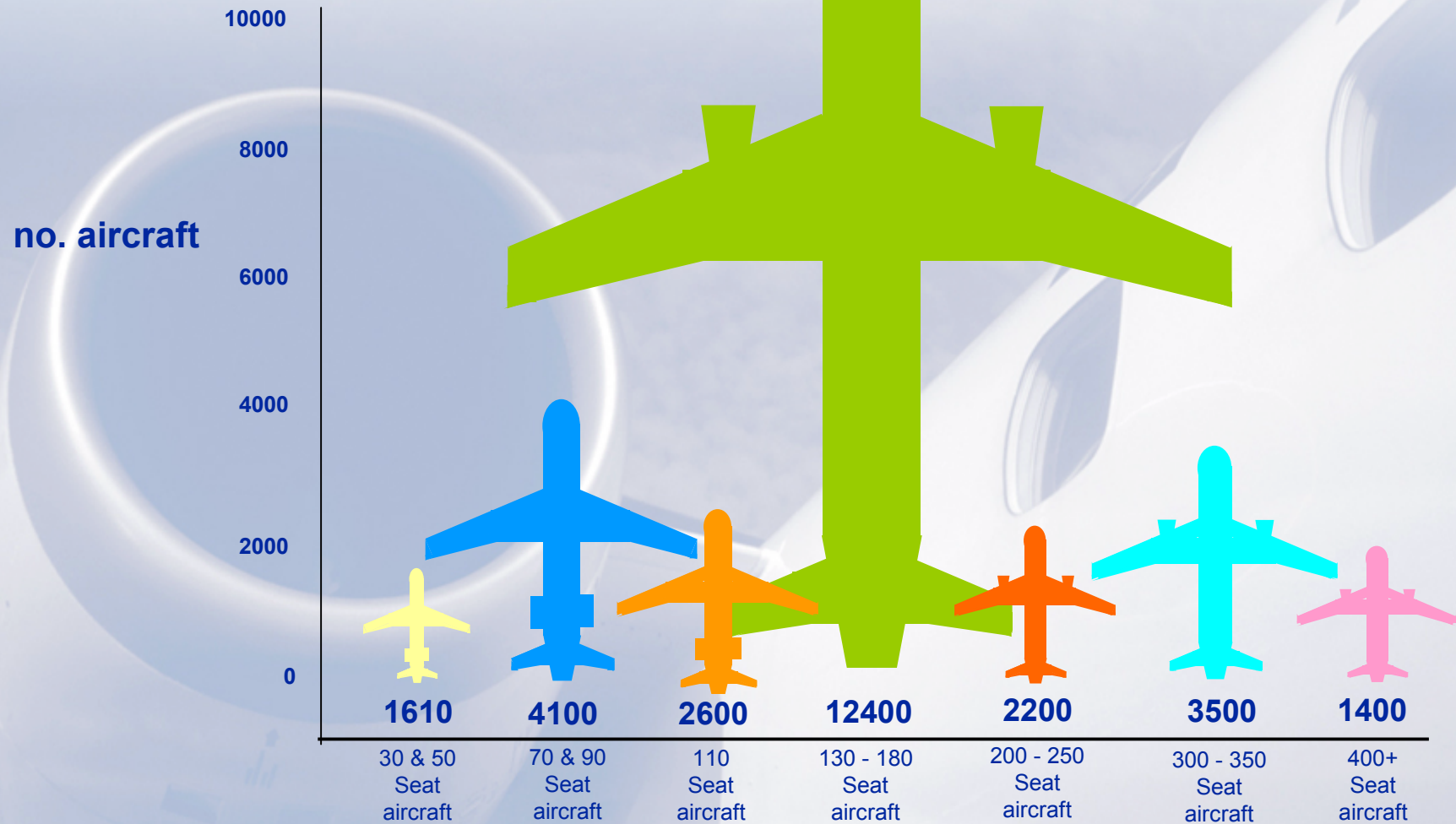


Source: CIA based, OAG database (2004)



# Aircraft market outlook until 2025

RR forecast 27,000+ aircraft deliveries civil (plus 24,000+ aircraft corporate, )





Rolls-Royce

