

Global network

Bodycote is experienced in all major market sectors and is able to combine the capability and expertise of a network of 178 worldwide locations to deliver global, or local, services for customers.

Overview

As the only global provider of subcontract thermal processing services, Bodycote is able to offer significant advantages to its customers. Through an international network of plants, Bodycote can effectively utilise a wealth of knowledge, experience and specialist expertise to deliver quality service when and where it is needed.

The network operates from 178 worldwide locations, with customers able to benefit from Bodycote's comprehensive range of services from multiple locations. Customers know that if their business expands, Bodycote will have the capability to meet their needs. They recognise that if they were to broaden their manufacturing footprint, Bodycote would be able to assist them. They are aware that they can obtain the same process to the same quality standards from multiple locations.

Such a large network brings economies of scale, with technology developed at one location being available globally if the market requires it. Similarly, network utilisation is enhanced by using logistics to put customers' work into the most effective facilities to meet their requirements.

The Bodycote network has a wealth of technical accreditations, some industry or customer specific, others more general. Individual operations concentrate on the accreditations suited to their market.

Although Bodycote is headquartered in the UK, 91% of the Group's revenue is derived outside the UK. With facilities in 24 countries, Bodycote is truly global.

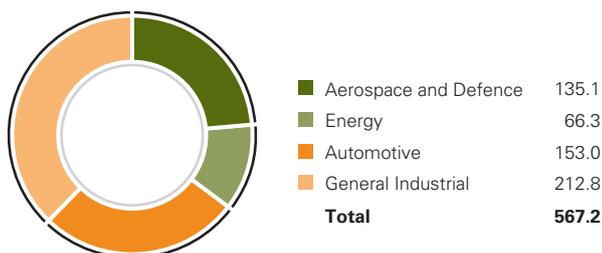
North America



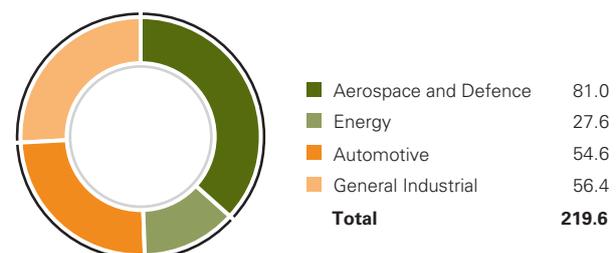
Bodycote is the largest provider of thermal processing services in North America by a significant margin, with a comprehensive network coverage. This network offers locations convenient to customers in all areas where manufacturing and technical industries are concentrated.

Our facilities offer the widest and deepest range of processes for aerospace and energy applications and all the leading technologies for automotive applications.

Group revenue by market sector
£m



Revenue by market sector — North America
£m



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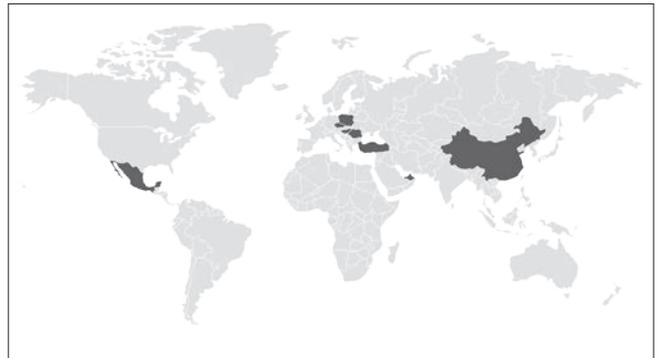
Western Europe



Bodycote is the number one provider of thermal processing services in Western Europe, with by far the largest network and a comprehensive service offering.

The range of process offerings varies somewhat by country and region, reflecting which types of industry are prominent in those locations, thus enabling the Group to best meet the needs of customers.

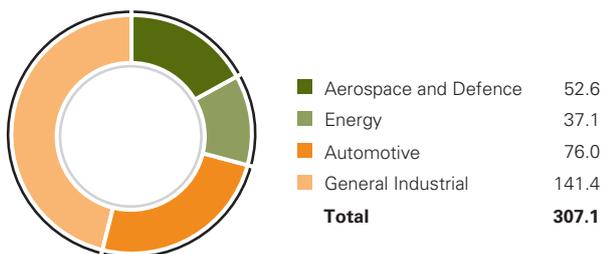
Emerging Markets



Bodycote has 26 facilities in emerging geographies covering Eastern Europe, China, Mexico, Singapore and Dubai.

Bodycote is the number one thermal processing provider in Eastern Europe and is the leading Western provider in China. These markets have a special emphasis in the Group's growth strategy for the future.

Revenue by market sector — Western Europe £m



Revenue by market sector — Emerging markets £m

