














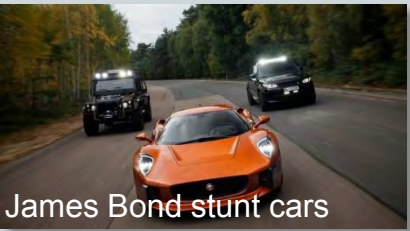


In addition, we have a world class line up of special vehicles created in Special Vehicle Operations – a £1bn business in its own right and growing



Special Vehicles	 <p>F-Type Project 7</p>	 <p>F-Type SVR</p>	 <p>XE SV Project 8</p>	 <p>F-Pace SVR</p>	 <p>XJ 575</p>
	 <p>Range Rover SVA-D</p>	 <p>Range Rover SVA</p>	 <p>Range Rover Sport SVR</p>	 <p>Discovery SVX</p>	
Classic Business	 <p>Lightweight E-Type</p>	 <p>D-Type Restoration</p>	 <p>Defender V8 Works</p>	 <p>Range Rover Reborn</p>	
	 <p>Range Rover SV Coupe</p>	 <p>Red Cross Discovery</p>	 <p>James Bond stunt cars</p>		

# We will continue our growth journey by adding new nameplates and expanding our powertrain offering



**Fiscal 2019**



19 product actions  
13 nameplates

**Fiscal 2020 - 2021**



**Defender**

38 product actions  
15 nameplates

**Fiscal 2022 - 2024**



42 product actions  
16 nameplates



## A The Challenges Ahead

## B Embracing These Challenges

- Our Strategy
- Our Product Portfolio
- Our approach to the ACES

**We know that the ACES are shaping the future of the automotive industry and we must embrace them**



**AUTONOMOUS**



**CONNECTED**

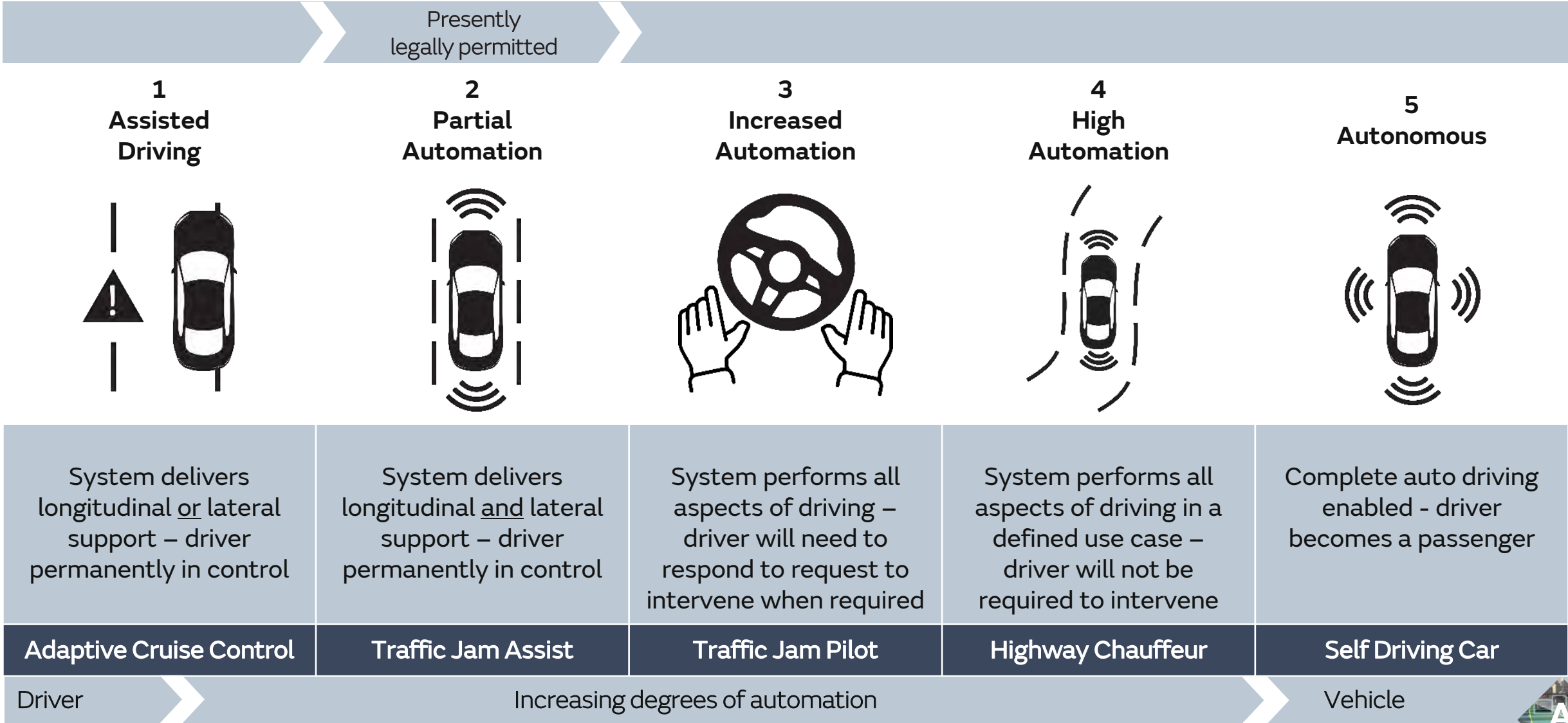


**ELECTRIC**



**SHARED  
MOBILITY**

Automated technologies exists in our cars today however for the industry to progress further into Level 4 and 5 technologies we will need the support of legislative bodies



# We have Level 1 features available on our products, with the first Level 2 features launching with the I-Pace



ADAS Level 1  
Currently in production

Automated Cruise Control  
Blind Spot Monitoring  
Lane Keeping Warnings  
Traffic Sign Recognition  
AEB (automatic emergency braking)  
Parking Assistance

ADAS Level 2  
Jaguar I Pace 2018

Features include:  
Traffic Jam Assist  
Integrated Cruise Assist  
Cyclist AEB

ADAS Level 3

Features include:  
Predictive Speed Optimisation  
Junction AEB  
Remote Control Drive  
Remote Control Parking  
Etc.

ADAS Level 4

Level 4 Highway Driving  
Level 4 Parking Assistance  
Level 4 Urban Driving



We're developing these features through both internal development and external partnerships



UK Autodrive: A government backed competition to support the introduction of self-driving vehicles in the UK



Partnership with Waymo to deliver up to 20,000 self-driving I-Paces



\$1m investment in a self-driving taxi company operating in Florida



# We have already begun the journey to a connected car, and are enhancing our suite of features for customers



## In-vehicle connectivity



Maximise use of existing devices when in the vehicle and access information



**'Touch' Infotainment**  
Multimedia and navigation system



**Wi-Fi Hotspot**  
Connects up to 8 devices



**Smartphone pack**  
Enables use of third party apps

## Off-board connectivity



View status information and give instructions to and from vehicle



**Remote smartphone app**  
Interact with vehicle remotely



**SOS Emergency Call**



**Stolen Vehicle Tracker**



**Roadside Assistance**  
Direct contact to provider

## Future connectivity



Next generation in vehicle infotainment system



Always on



Always connected



Always listening



Always up to date



# We've just launched our first all electric vehicle, the Jaguar I-Pace



**VERDICT:** Performance, agility and range all combine in the I-Pace to create the most compelling EV on the market

**EVO RATING:** ★ ★ ★ ★ ★

**AUTOCAR**

## Jaguar I-Pace EV400 S 2018 review

From £63,495 ★ ★ ★ ★ ★

make no mistake: you're looking at the best of them.



**Verdict**



Jaguar has succeeded in not only creating the best electric car on sale but perhaps one of the most exciting cars you can buy.

# But we understand that there are real world barriers to buying electric vehicles, and we can't accurately predict the adoption rate...



43%



Of UK consumers say that charging an EV battery would have to be as quick and easy as filling up the tank with gasoline.

*Cap Gemini, Beyond the Car, May 2017*

66%



Of property in London lacks a garage or off street parking which would allow home charging stations

*McKinsey, 2016*



40%

Of London's public charge points are out of service at any one time.

*Financial Times*



**BERNSTEIN**

57% for rapid adoption,  
36% for government  
target scenario  
17% for slow adoption  
globally by 2030

Bernstein: Electric Revolution 2018: The Resistance, Part 1 - Bottlenecks, substitutes and hold-outs February 2018



26% globally in 2030

Global Electric Vehicle Battery Handbook: Disruptive with strong growth July 2016



24% globally in 2030

Bloomberg Electric Vehicle Outlook July 2017



And that the law of averages can be extremely dangerous



Because the roll out across the globe will be very different



# LONDON



# SHANGHAI



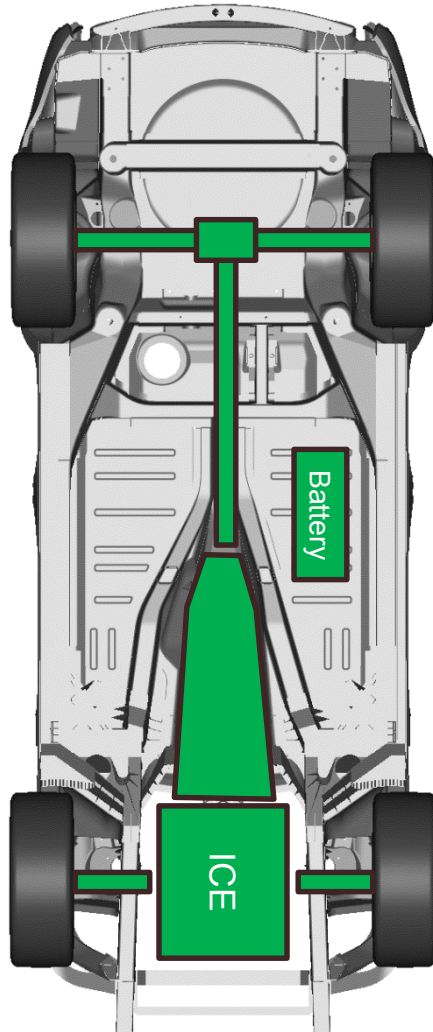
# HOUSTON



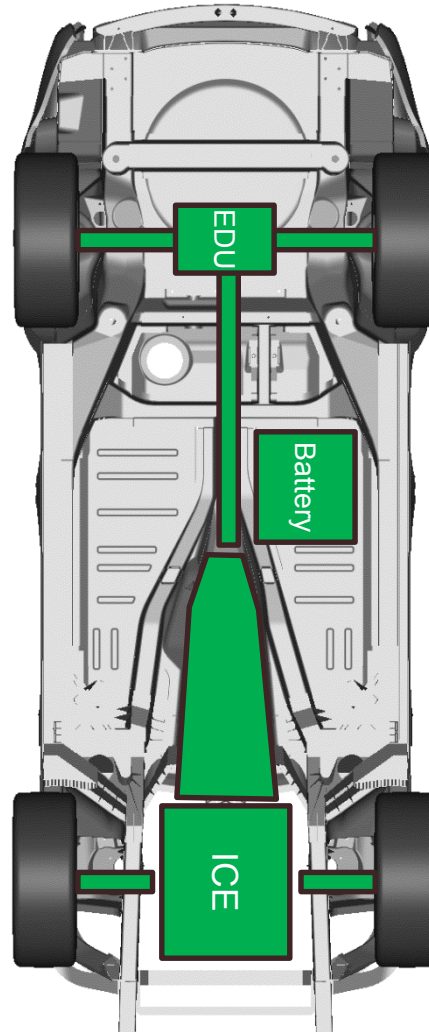
# To offer this flexibility we're investing in a new platform: Modular Longitudinal Architecture (MLA)



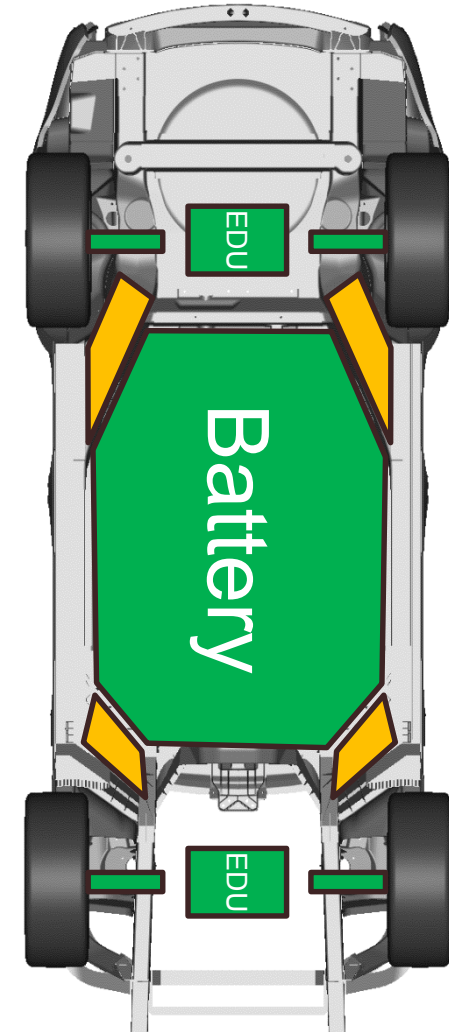
ICE & MHEV



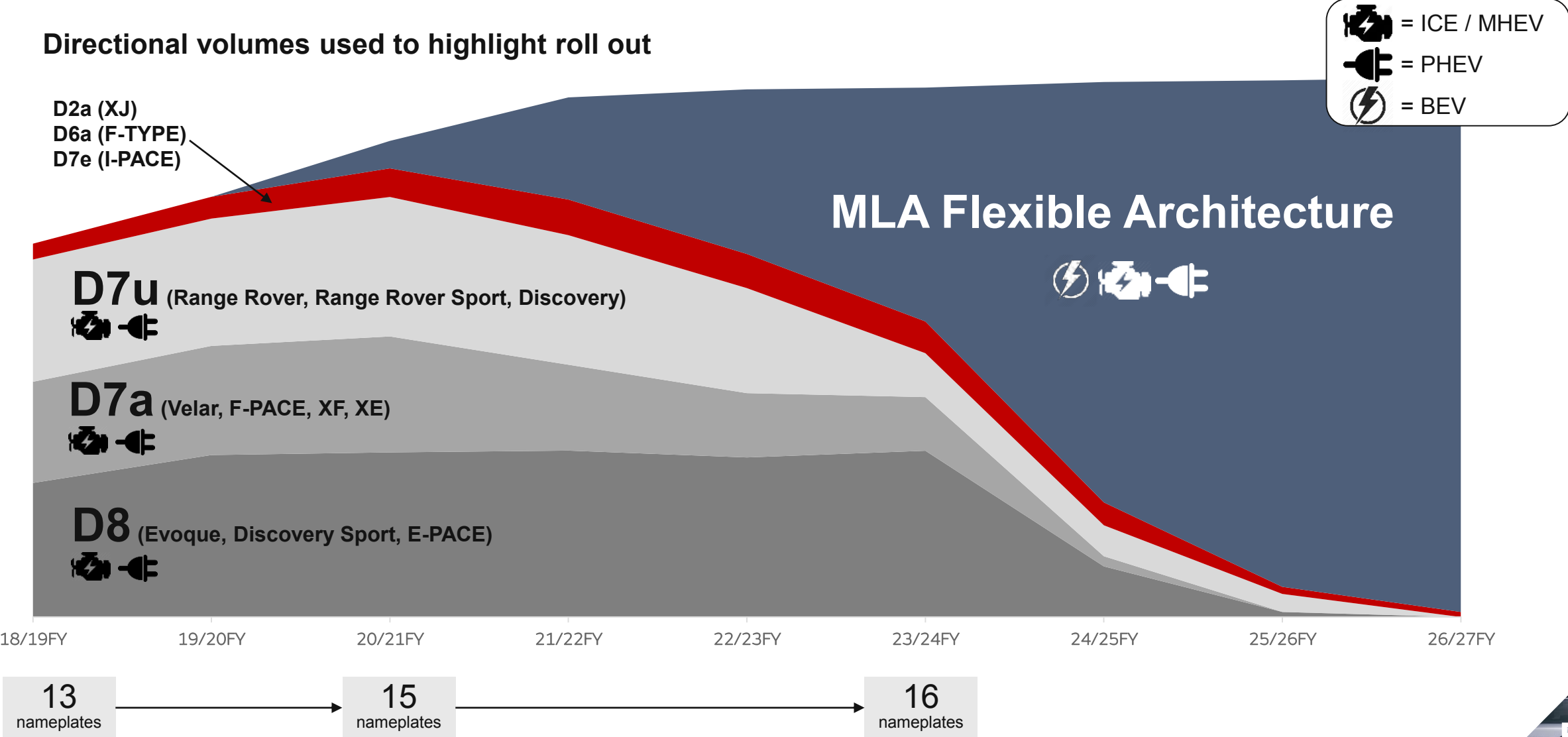
PHEV



BEV



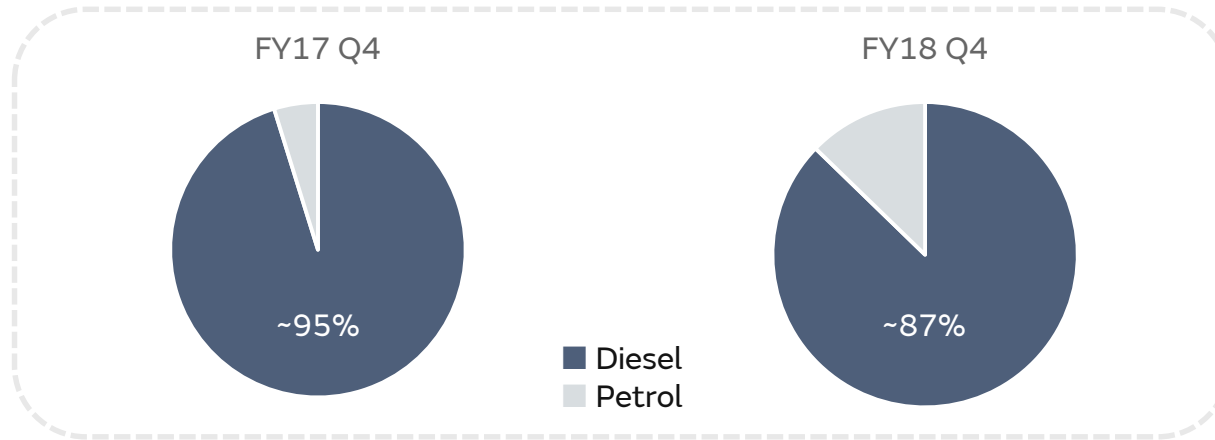
# Our roll out to MLA will be fully complete by 2025 at which point every product can cater for an ICE, BEV or PHEV derivative



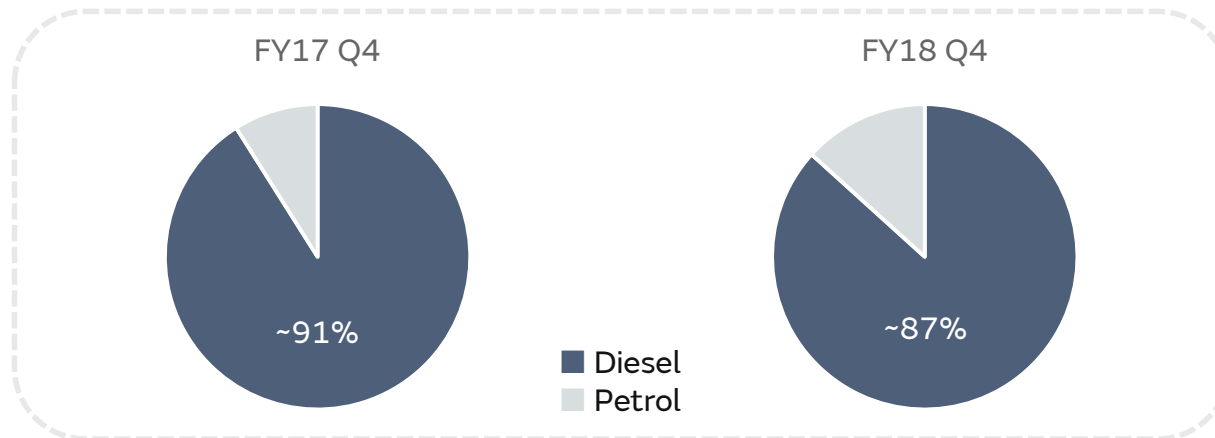
# The need for this flexibility is also highlighted through our forecasted powertrain volume mix



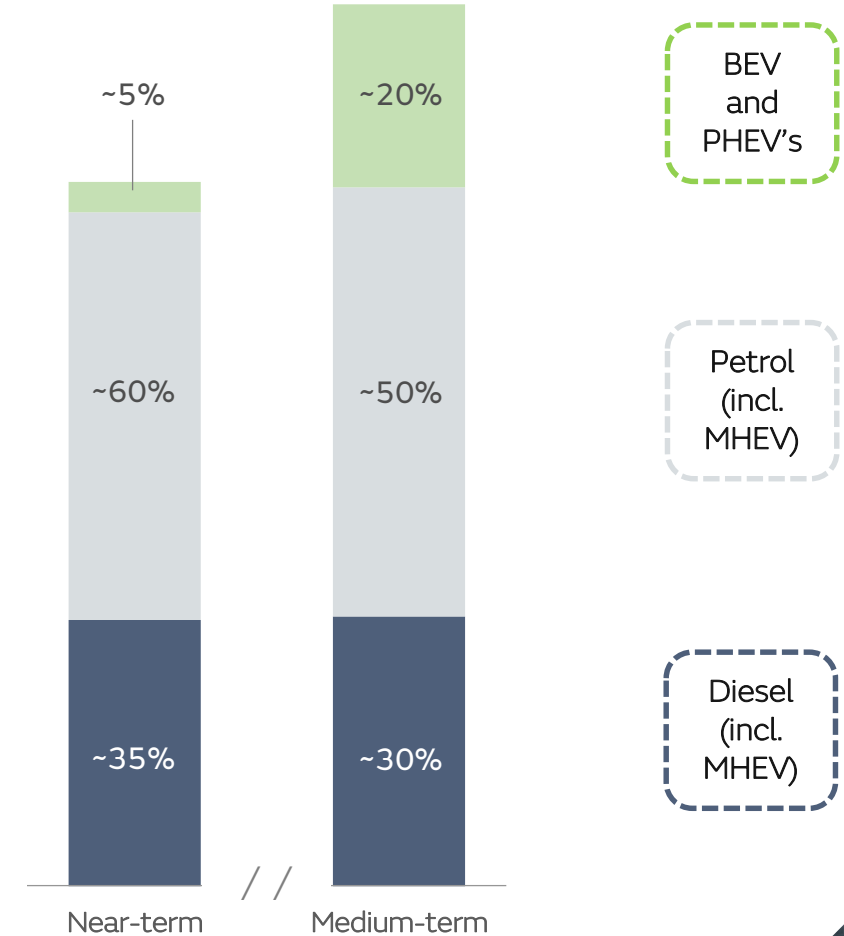
JLR UK sales



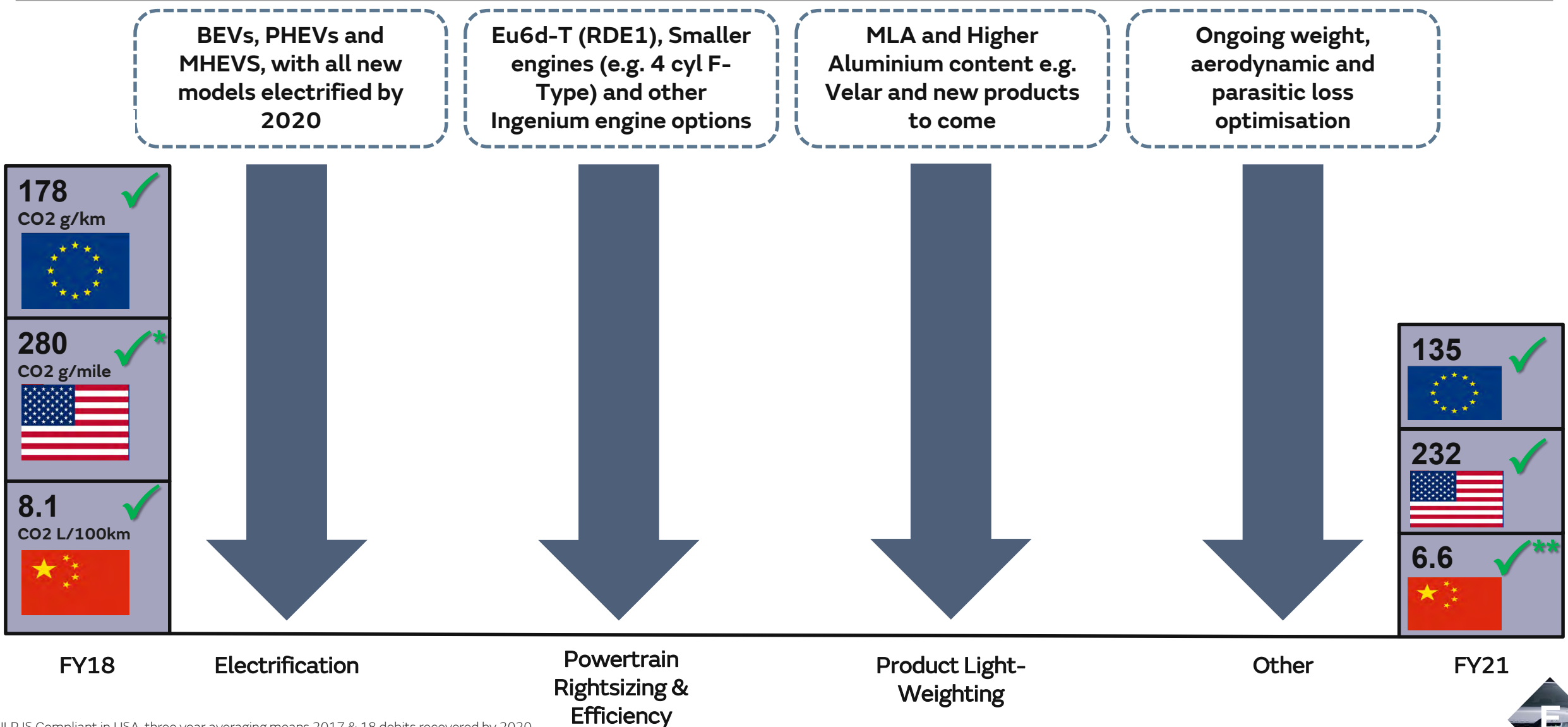
JLR EU sales



JLR global sales



# Our strategy delivers a fully emissions compliant portfolio\*\*\*



\* JLR IS Compliant in USA, three year averaging means 2017 & 18 debits recovered by 2020  
\*\* 2021 China Targets 1<sup>st</sup> Draft Proposal CAFC Stage V tbc  
\*\*\* Based on todays volume and mix assumptions (powertrain and regional), as well as todays understanding of future regulations



The need for flexibility extends beyond products, we know we have to also adapt our business models and services



Our vision for mobility is to become a leading premium mobility player, dedicated to delivering experiences customers love for life

Leading	Premium	Mobility	Experiences Customers Love	For Life
<i>JLR at the forefront in ACE fleets, premium mobility products &amp; prestige services in select cities</i>	<i>Not ordinary, but extraordinary which commands premium and builds on the brands</i>	<i>Extends from the movement of people to enjoying the destination itself – compliment core</i>	<i>Distinctive, desirable, relevant, useful and accessible. A single, seamless experience</i>	<i>Generational brand building to drive customer lifetime value</i>



# Through InMotion, we're already deepening our understanding of both the challenges and opportunities that mobility brings



## Jaguar Land Rover's Corporate Venturing Unit

### STRATEGIC BUSINESS UNIT

- Develops proprietary mobility services
- Pursues cross-divisional collaboration with JLR
- Engages in strategic partnerships, e.g.



Vehicle rental in London, developed and deployed by JLR



Unlimited mileage vehicle subscription of a Jaguar or Land Rover

### VENTURE CAPITAL ARM

- Focused on early stage – Seed to Series B
- Multipronged approach to proprietary deal flow
- Invests globally in best-of-breed technology companies, e.g.



On-demand school buses in the US  
\$1m investment through InMotion



# The Waymo partnership is both driving autonomous capability and understanding of shared mobility business models



Owned by Alphabet, Waymo - universally acclaimed world leaders in autonomous driving technology are partnering with Jaguar Land Rover



Up to 20,000 I-PACEs over 2020 and 2021 to be used by Waymo in their autonomous vehicle mobility service, planned for rollout in the US



**JLR and Waymo will collaborate to develop and maintain self-driving Jaguar I-PACE vehicles**



Waymo Jaguar I-PACEs, equipped with Waymo's self-driving technology, will start testing later this year



On-road testing and real-world data to allow Waymo and JLR engineers to refine technology and deliver optimum safety and reliability

## THE VERGE

### WAYMO AND JAGUAR WILL BUILD UP TO 20,000 SELF-DRIVING ELECTRIC SUVs

*Jaguar I-Pace will be the second official vehicle in Waymo's robot taxi fleet*

By Andrew J. Hawkins | @andjayhawk | Mar 27, 2018, 10:09am EDT



Financial Times • @FinancialTimes • 16m  
Waymo and Jaguar Land Rover pair up to push self-driving cars



**Waymo and Jaguar Land Rover pair up to push self-driving cars**  
Carmaker will provide up to 20,000 electric SUVs to form part of tech group's taxi fleet  
ft.com

1 5 9



Bloomberg • @business • 33m  
Waymo and Jaguar team up with 20,000 car self-driving fleet [bloom.bg/2pKTZdD](https://bloom.bg/2pKTZdD)



4 12 24





# BRANDS, MARKETING AND SALES

## **THE COMMERCIAL TEAM**

FELIX BRAUTIGAM  
CHIEF COMMERCIAL OFFICER

# THE COMMERCIAL TEAM

## Agenda

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Market Environment



Brands

Communications

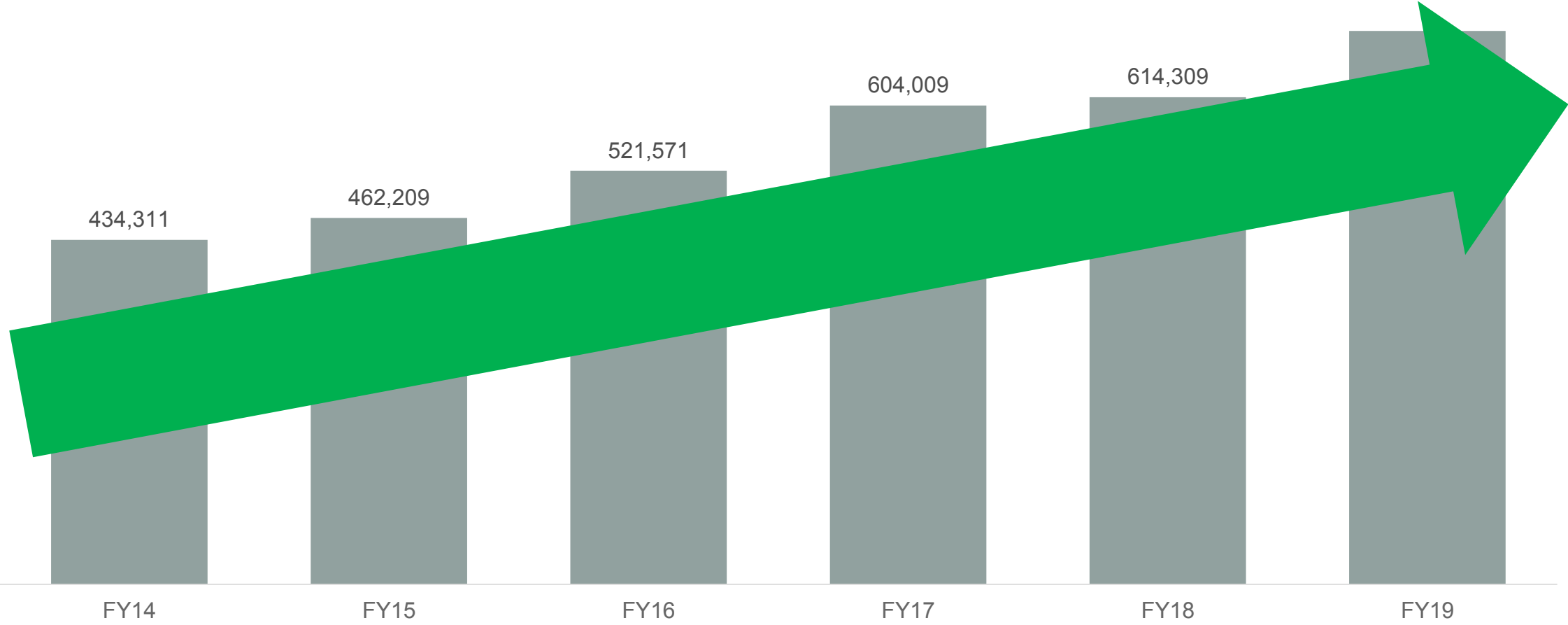
Network

Team



# OUR PERFORMANCE...

...has been Excellent

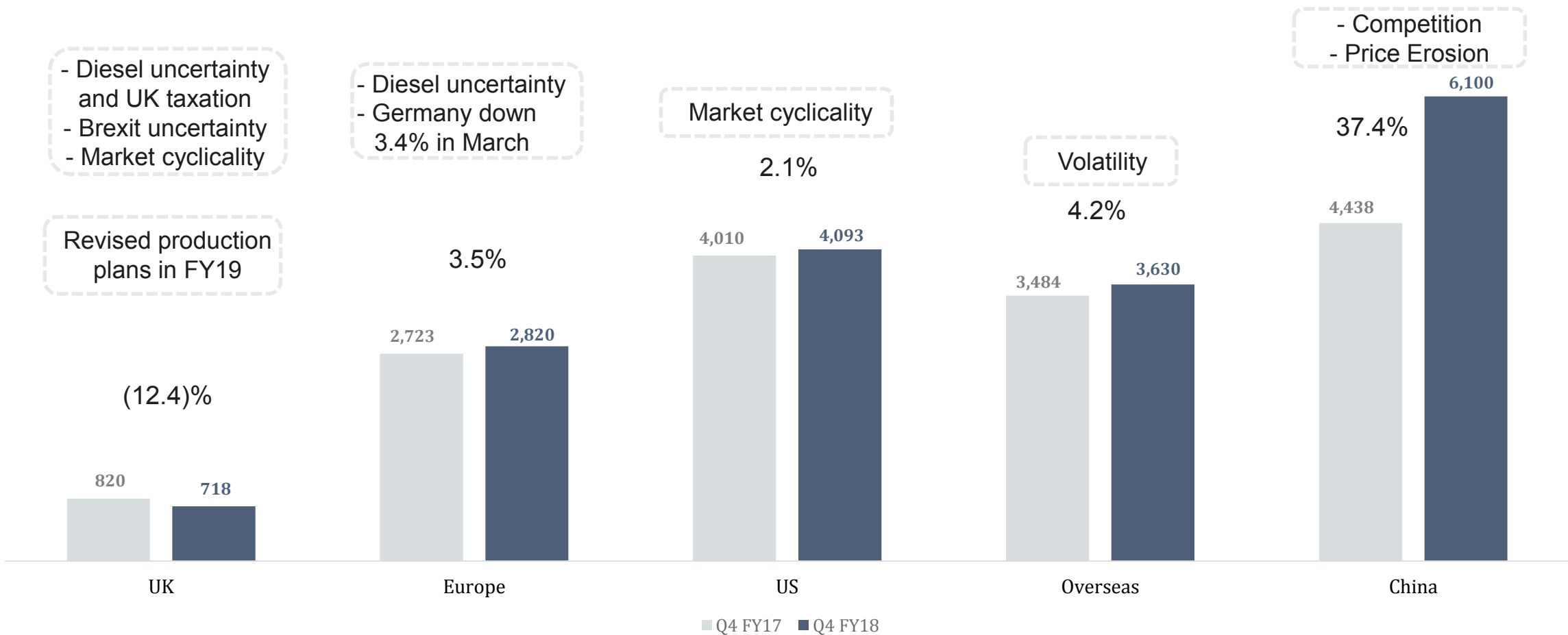


# RECENT TRENDS

## in Industry Volumes



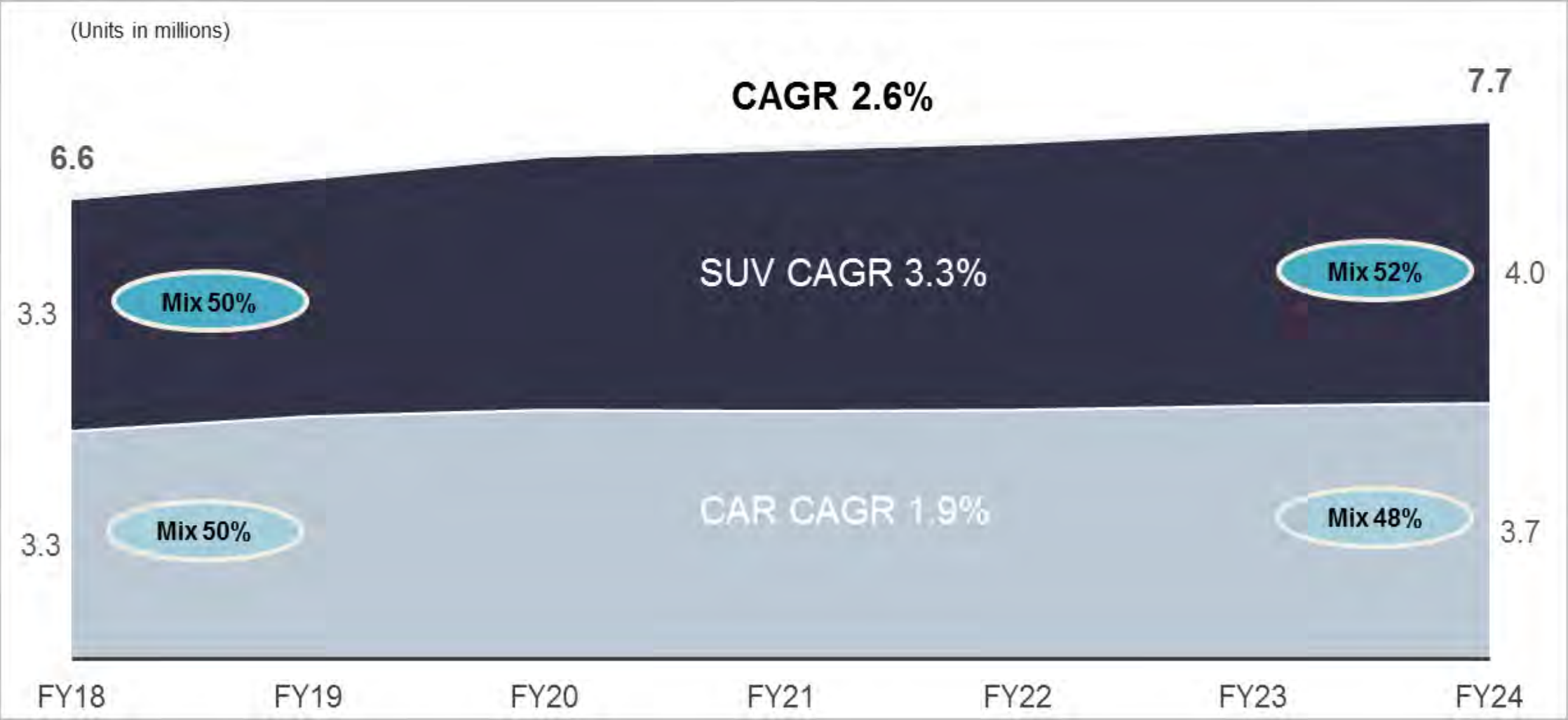
Units 000s



The total industry car volume data above has been compiled using relevant data available at the time of publishing this Interim Report, compiled from national automotive associations such as the Society of Motor Manufacturers and Traders in the UK and the ACEA in Europe, according to their segment definitions, which may differ from those used by JLR. South Korea industry volumes have been excluded from Overseas

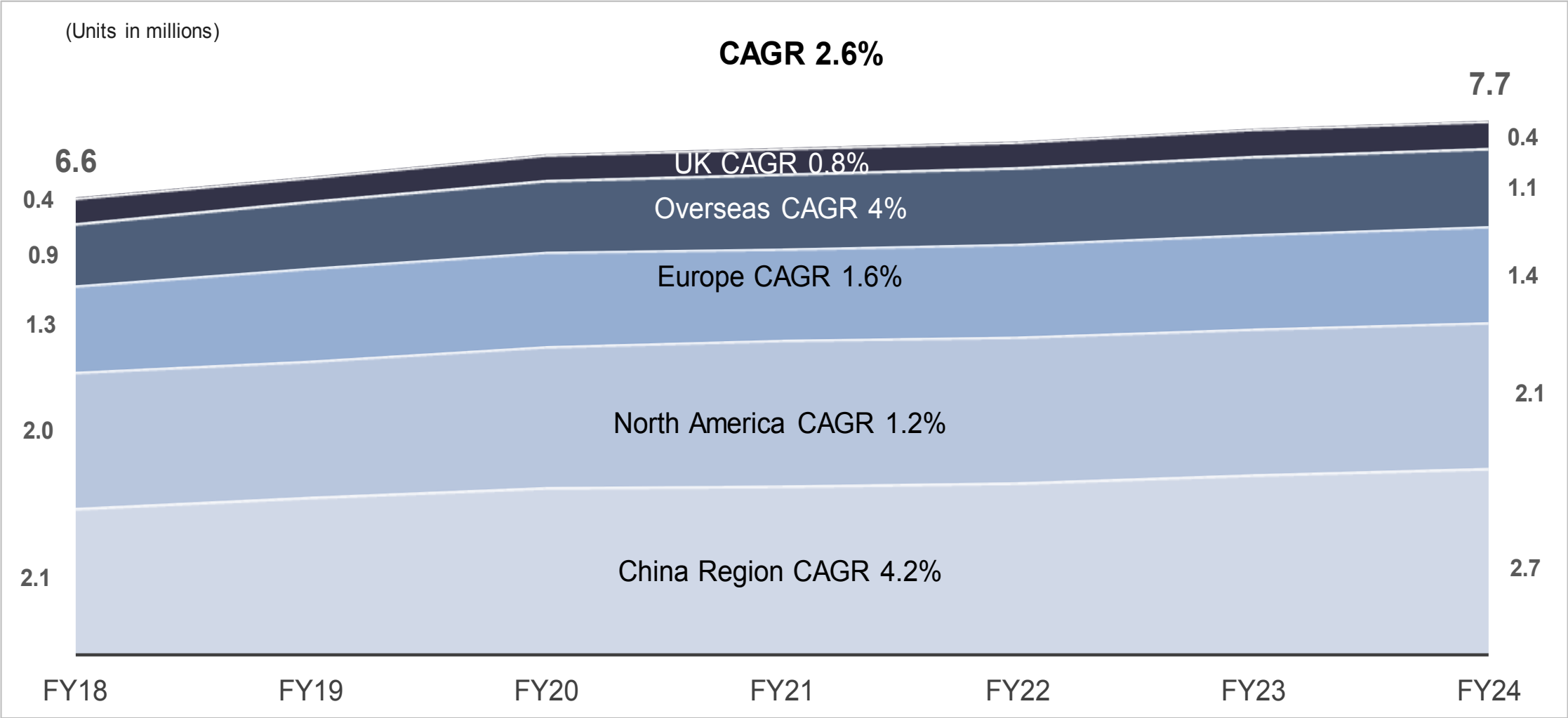
# GLOBAL JLR SEGMENT VOLUMES

## Growing JLR Segments



# JLR TARGETED SEGMENTS BY REGION

## Broad Growth Across Regions



# THE COMMERCIAL TEAM

## Agenda

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Market Environment

Brands



Communications

Network

Team

