



# Eaton's 2016 Aerospace Customer Support Conference



*Powering Business Worldwide*

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# Eaton Overview & Updates

**Lasse Ostergaard**

Vice President

Aftermarket Organization



*Powering Business Worldwide*

# Agenda items

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- Eaton overview
- Leadership changes
- Help needed

# Powering businesses worldwide for more than 100 years



## Eaton

- Founded in 1911 by J.O. Eaton
- Chairman & CEO – Alexander M. Cutler
- Headquarters: Dublin, Ireland
- Key global locations: Cleveland, Ohio; Shanghai, China; Morges, Switzerland; Sao Paulo, Brazil
- Customers in more than 175 countries
- \$20.9B in 2015 sales
- Approximately 97,000 employees



## Aerospace Group

- \$1.8B in 2015 Sales
- Approximately 6,000 employees
- 21 global facilities and a JV in China
- Headquarters: Irvine, California
- Divisional Headquarters
  - Fuel & Motion Control Systems – Ft. Worth, TX
  - Fluid & Electrical Distribution – Ft. Worth, TX

# Eaton's businesses



Electrical Sector  
2015 Sales \$12.9B

Electrical Products

Electrical Systems & Services

Industrial Sector  
2015 Sales \$8.0B

Hydraulics

Aerospace

Vehicle

# Providing power management solutions influenced by global megatrends

- 60%** . Increase in global demand for energy in buildings projected by 2050
- 600%** Increase in the global LED lighting market projected by 2020, a CAGR of ~25%
- 70%** .. Increase in liquid petroleum demand in Non-OECD nations expected by 2040
- 70%** .. Increase in food production by 2050 necessary to feed a global population of 9.1 billion people
- 150%**. Increase in distances travelled by commercial aviation expected by 2030
- 25%** .. Increase in fuel economy necessary by model year 2018 to meet the first ever U.S. emissions standards for heavy-duty trucks

***Eaton is uniquely positioned to provide safe, reliable, efficient and sustainable power management solutions for our global customers.***



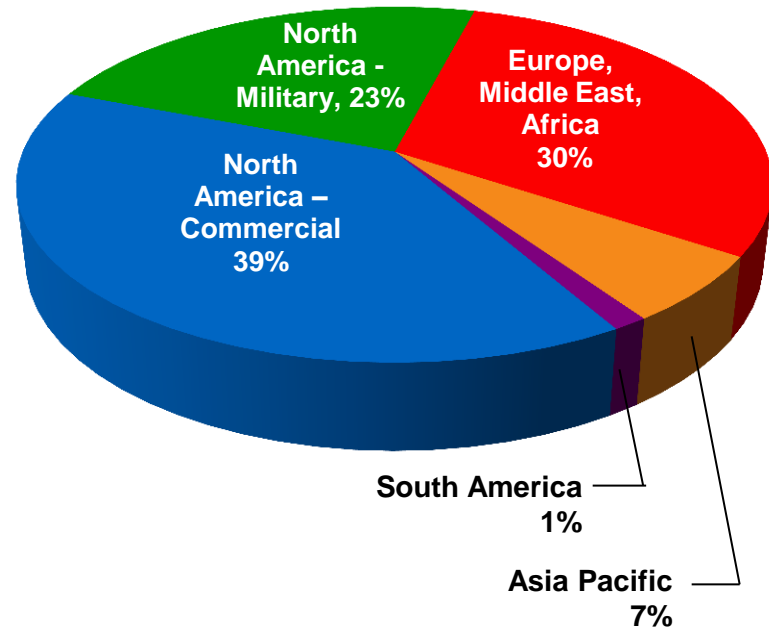
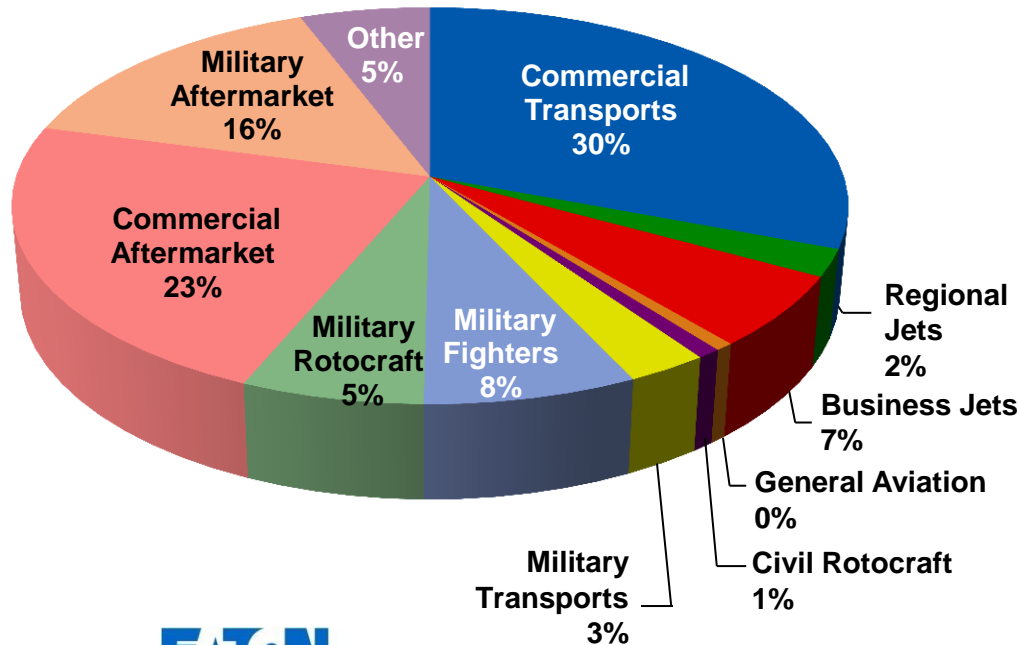


# Committed to **doing business right**

- Recognized as a leader among S&P 500 companies on the CDP's Climate Disclosure Leadership Index for six years
- Ranked among world's top sustainability performers in NASDAQ Global Sustainability 100 Index
- One of Corporate Responsibility Magazine's 100 Best Corporate Citizens, 2007 – 2015

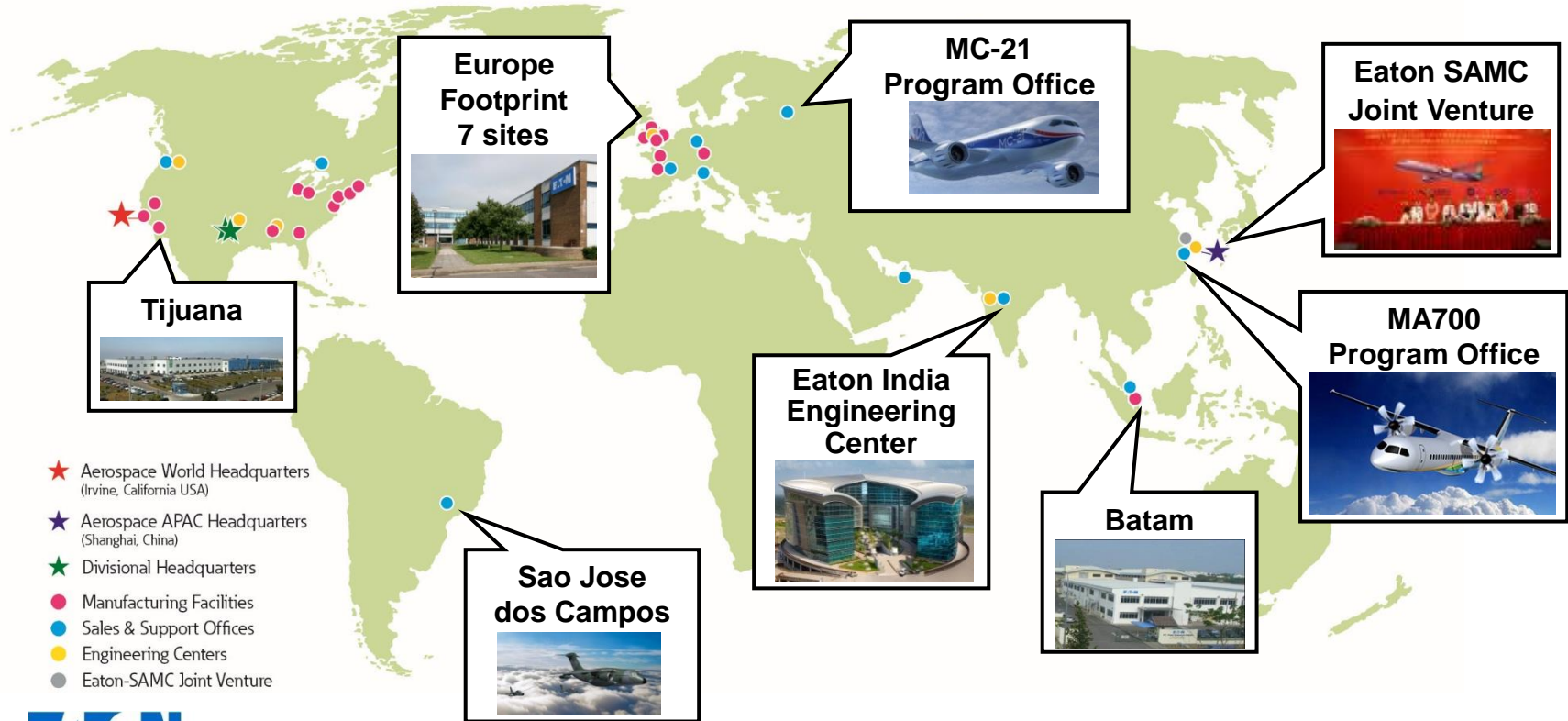
# Aerospace Group portfolio is diversified across market segments

**2015 Sales: \$1.8B**





# Aerospace Group footprint expanding in emerging markets



# Eaton's Aerospace Group offering is aligned with market needs



Component Excellence



System Solutions



Innovative Technology



Eaton Reputation



Pedigree



Aftermarket Support

## Components

- Industry leader in component design and in-service reliability
- Innovative component design capability

## Systems

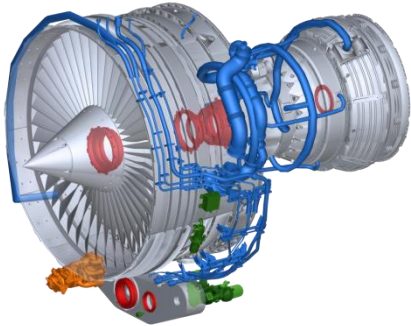
- Broad product portfolio enables comprehensive system installation offerings
- Embedded engineering teams deliver system solutions that improve performance, ease of installation and reduce life-cycle costs

## Aftermarket

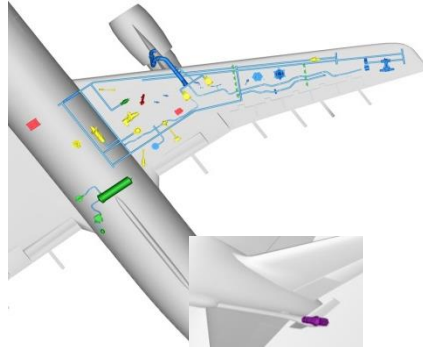
- Global support infrastructure and repair capability
- Innovative in-service solutions including Power By Hour and Performance Based Logistic offerings

# Product groups

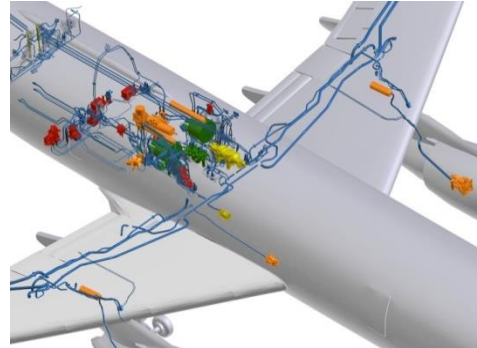
## Engine Solutions



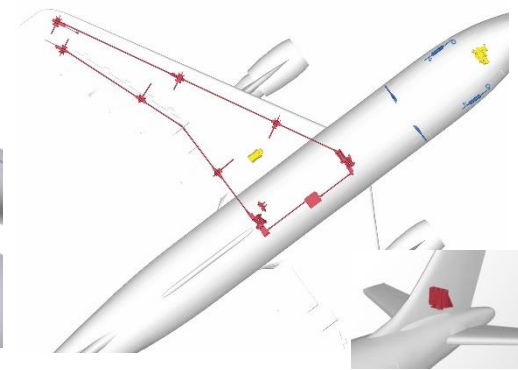
## Fuel & Inerting Systems



## Hydraulic Systems



## Motion Control



- Engine Fuel Pump Solutions
- Lubrication Components
- Sealing Solutions
- Engine Externals & Engine Build-Up (EBU)

- Fuel Distribution and Vent Systems
- Inerting System
- Fuel Quantity Indicating System
- Conveyance
- Aerial Refueling System

- Hydraulic Power Sources
- Fluid Storage/Conditioning
- Fluid Controls
- Conveyance
- Hydraulic Consumers

- Nose Wheel Steering & Controllers
- Utility Actuation
- Secondary Flight Control

# Global services to support end user customers



## Experience

- Global footprint includes regional repair stations and field support
- 60+ year benchmark Customer Support Conference

## Key Platforms

- Military:
  - C-17, C130, CH-47, F5, F15, F16, F18, T-45, UH-60, V-22
- Commercial:
  - All Airbus and Boeing commercial platforms, CFM56, CF6, V2500, PW2000, PW4000, RB211

## Innovation Solutions

- FAA approved Ducting and Seal repairs offer significant savings
- Numerous upgrade programs deliver improved reliability and life cycle cost
- New business models that customize service agreements

# Providing life cycle support



## Product

- Superior Reliability
- Engineering Expertise



## Service

- Product Availability/On-Time
- Flexible Solutions



## Cost

- Reduced Life Cycle Costs
- Predictable Maintenance Costs



## Eaton's Value Offering

- Product Upgrades & Retrofits
- Reliability Management
- OEM Standard Work Scope

- Power-by-the-Hour Solutions
- Expanding Partnerships
- Industry Standard Spares / Repairs Delivery Performance

- Higher Dispatch Reliability
- Predictable Maintenance Costs
- Pool Stock Solutions

# Eaton Corporation Senior Leadership Team

**Craig Arnold**



**President and COO**

- 15 years at Eaton
- Member of Eaton board
- Director Medtronic plc
- COO, Industrial Sector
- CEO, Fluid Power Group
- 17 years at General Electric
  - President of Lighting, Europe
  - President of Appliances, Asia

**Rick Fearon**



**CFO**

- 13 years at Eaton
- Member of Eaton board
- Lead Director PolyOne
- 6 years at Transamerica as SVP Corporate Development
- 5 years at NatSteel in Singapore as Chairman NatSteel Chemicals & VP Corporate Development

**Revathi Advaiti**



**Electrical COO**

- 14 years at Eaton
- President, Electrical Americas
- President, Electrical APAC (based in China)
- VP/GM, Electrical Components Division
- 6 years at Honeywell
  - VP, Honeywell Field Solutions

**Uday Yadav**

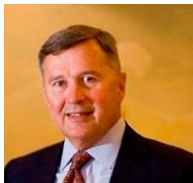


**Industrial COO**

- 16 years at Eaton
- President, Aerospace
- EVP, Eaton Business System
- President, Hydraulics APAC (based in China)
- VP, Supply Chain, Fluid Power Group
- Managing Director, Eaton India
- 6 years at Lucas Engineering and Systems Consulting based in Europe



# Eaton Corporation Senior Leadership Team



**Jim McGill**

**President,  
Electrical - Americas**

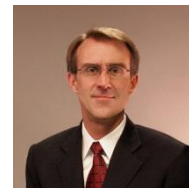
- 38 years at Eaton<sup>(1)</sup>
- President, Electrical Products Americas
- President, Electrical APAC
- President, Eaton APAC
- EVP, Eaton Business System
- EVP, Human Resources



**Frank Campbell**

**President,  
Electrical and Eaton - EMEA**

- 31 years at Eaton<sup>(1)</sup>
- President, Electrical EMEA
- SVP, Electrical Sales and Marketing
- VP/GM, Electrical Assemblies
- VP/GM, Electrical Commercial Facilities



**Brian Brickhouse**

**President,  
Electrical - APAC**

- 30 years at Eaton<sup>(1)</sup>
- President, Power Quality Division
- SVP/GM, Distributed PQ Division
- SVP, Critical Power Solutions Division
- Powerware Commercial integration leader



**Curt Hutchins**

**President, Hydraulics**

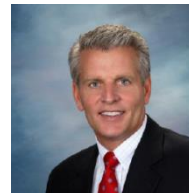
- 12 years at Eaton
- President, Heavy Duty Transmission business
- President, Eaton APAC
- 16 years in consumer products and aerospace industries



**Nanda Kumar**

**President, Aerospace**

- 25 years at Eaton
- EVP, Eaton Business System
- President, Vehicle EMEA
- SVP/GM, Valvetrain
- VP/GM, Specialty Controls and Valve Actuation



**Ken Davis**

**President, Vehicle**

- 30 years at Eaton
- President, Vehicle Group Americas
- President, Light and Medium-Duty Transmission
- VP/GM, Clutch Division

**These 10 leaders have over 200 years of combined Eaton experience**

<sup>(1)</sup> Includes tenure at companies acquired by Eaton

# Aerospace Group Senior Leadership Team



# Aerospace industry continues to be tougher

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- We all operate in a New Reality
  - Beat customer expectations
  - Run a cost effective and efficient operation
- New aftermarket initiatives
  - Eaton Global Trading
  - Tube & Duct Repairs

# Help needed

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- Feedback to Eaton team
  - Changes in the market
  - Eaton's performance
  - Products you have issues with: reliability, quality, availability or value



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[www.eaton.com/aerospace](http://www.eaton.com/aerospace)

# 2016 Eaton Aerospace Customer Support Conference

