

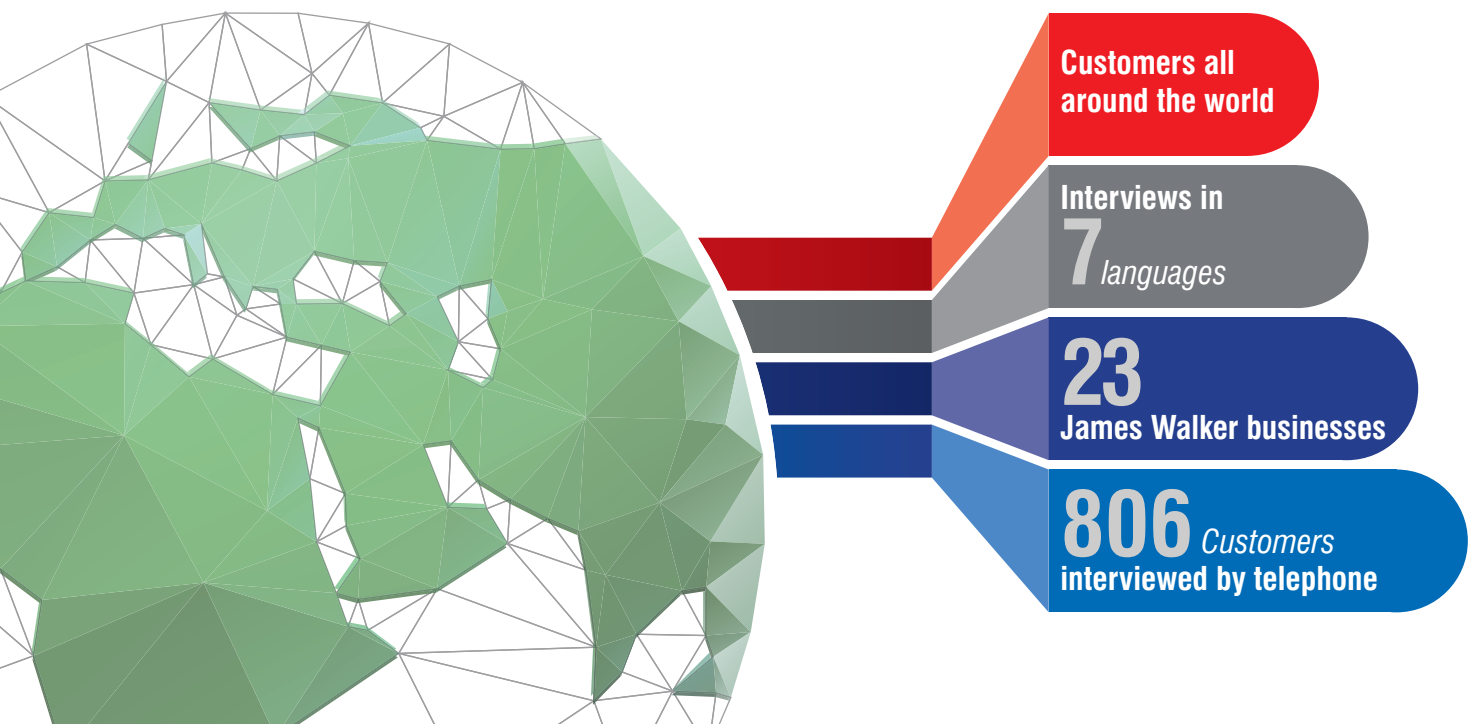
Our aim is to provide our customers with an experience that ensures we become a supplier of choice for engineering solutions. We want you to stay loyal to us because you want to and not because you have to. We realise that over recent years customer experience has become a focus for all our competitors too. This means we really have to set ourselves apart to be noticed.

In 2006 we decided to conduct our first customer satisfaction survey. We wanted to understand how our customers really felt about us and what we needed to do differently to be a supplier of choice. We gathered this information through talking to customers and gathering scores and comments. The feedback we received was invaluable. We have surveyed annually since then to ensure we keep in touch with how customers feel. Over the last eight years, the feedback we have gathered has helped us immensely by influencing our thinking, planning, actions and communications. This year our Customer Satisfaction Index has dropped slightly. This is disappointing for us because we were very busy making changes during 2013. This result has heightened our resolve to concentrate our efforts going forward.

We have always understood that improving customer experience is not a quick or easy task and it is a job that is never finished. We have been aware that we would face challenges and remain fully committed to improving our customers' experience and investing in making the right changes. Once again, we'd like to thank you for your feedback.

Thank you for your feedback.

Peter Needham, Chairman and Chief Executive



What the survey told us...

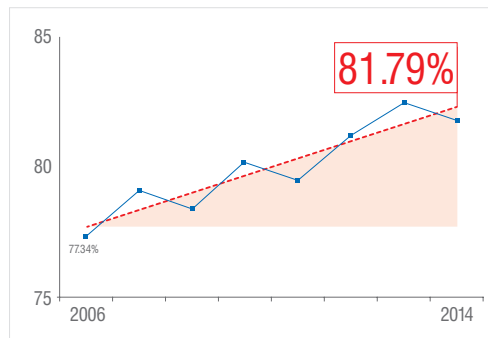
This year, our Customer Satisfaction Index has dropped slightly. Although disappointed with this result, we take some comfort in seeing how much our Customer Satisfaction Index has improved since 2006.

We acknowledge that there are areas where we can perform better. However, it is encouraging to know that we are also getting things right in many aspects of our performance.

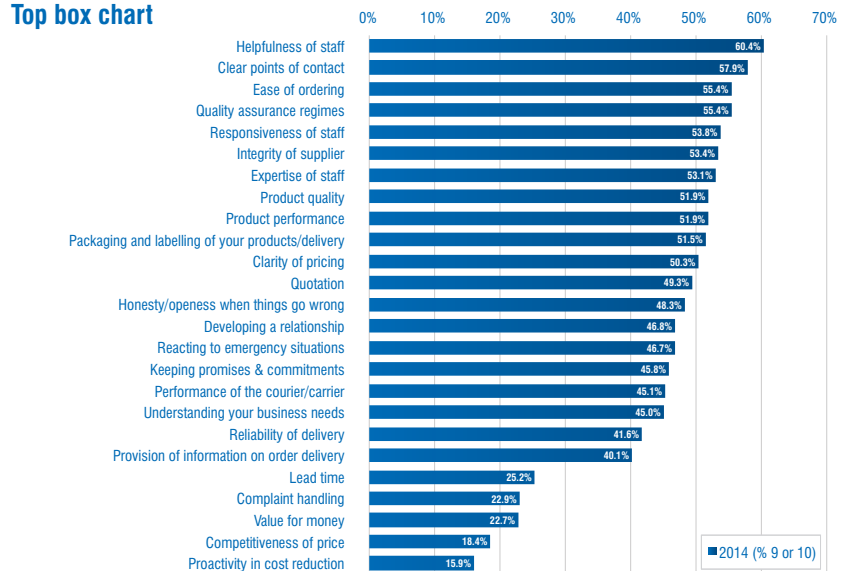
Comments

“*Their product is the best in the market and certain individuals in the company are very knowledgeable. They have helped me a lot in the past few years.*”

“*Due to the service we have received over the last six months we have been using them more actively than in the past. We researched the market and found they were giving us the best service.*”



Top box chart



The best performing James Walker Group companies are:

JW Moorflex, D.C.Rowe, JW France, JW Flemings, JW Ireland, JW Manufacturing (Chicago) and JW Australia.

These businesses appear in the top quartile of The Leadership Factor's Benchmark League Table based on all surveys conducted by The Leadership Factor.

What we did in 2013:

Extended the Service Excellence Programme
A number of local, tailor-made initiatives have been rolled out across companies in the Group.

Invested in IT
We successfully piloted a Knowledge Management System. This will be launched globally throughout 2014.

What we're going to do in 2014:



Customers are selected at random to take part in the survey. If you were not approached on this occasion but would like to make any comments or provide feedback, please do not hesitate to contact Heather Grisedale on +44 (0) 1900 898415 or customersatisfaction@jameswalker.biz. Your feedback is always welcome.