

December 2010

# 2011 GLOBAL

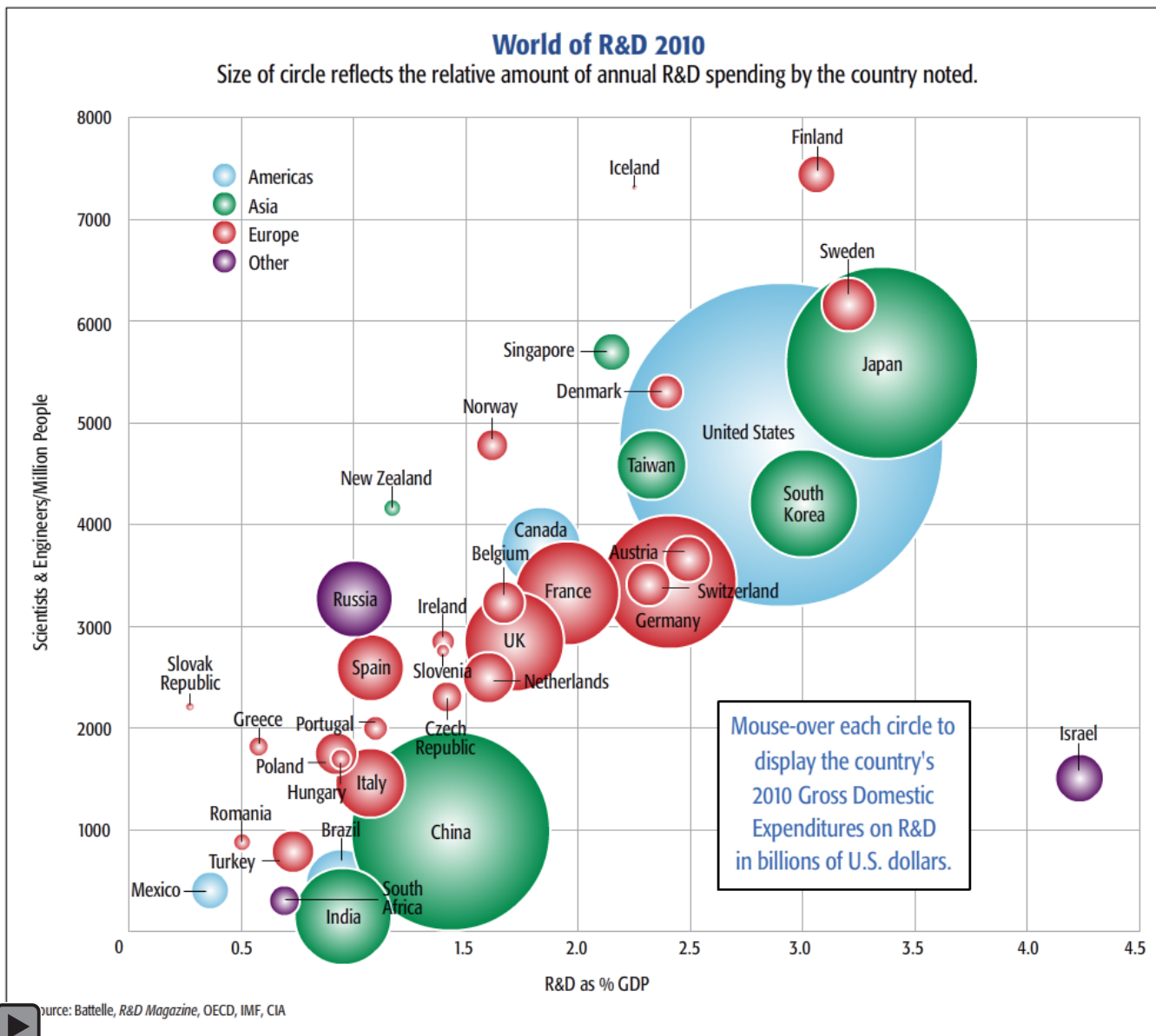
## R&D FUNDING FORECAST

### Key/Interactive Charts





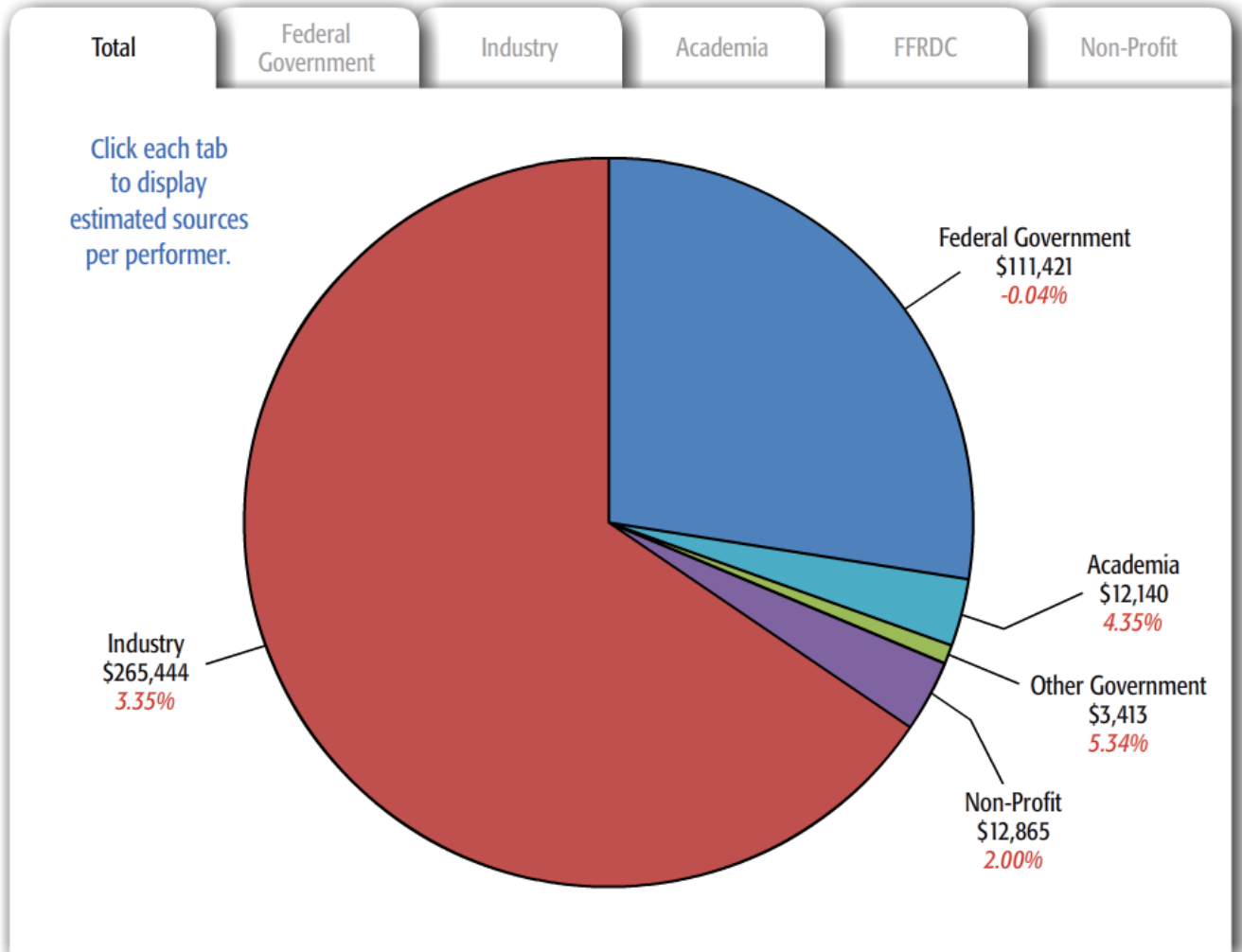
## World of R&D: Country-by-Country Annual Spending





## Estimated R&D Funding Distribution in 2011

Estimated Sources of R&D Funds in 2011 per Performer  
Millions of Current U.S. Dollars *(Percent Change from 2010)*



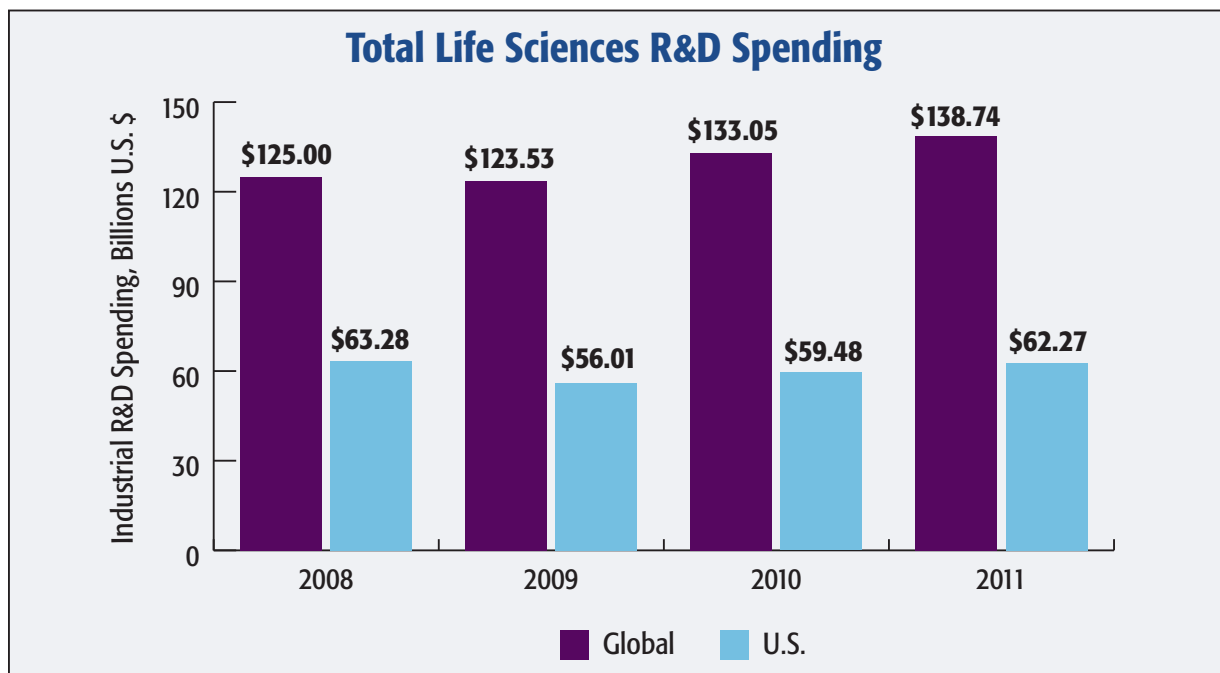
Source: Battelle, R&D Magazine



## Industrial R&D: Life Sciences

<b>Life Sciences</b>	2008	2009	Q1-Q3 2010
Top U.S. R&D Spenders	Millions, U.S.\$		
Merck & Co.	8,334.3	8,425.0	6,474.0
Pfizer, Inc.	7,945.0	7,845.0	6,607.0
Johnson & Johnson	7,577.0	6,986.0	4,862.0
Lilly (Eli) & Co.	3,840.9	4,326.5	3,446.1
Bristol-Myers Squibb Co.	3,512.0	3,647.0	2,556.0
Amgen, Inc.	3,030.0	2,864.0	2,010.0
Abbott Laboratories	2,688.8	2,743.7	2,667.0
Medtronic	1,335.0	1,451.0	n/a
Biogen Idec Inc.	1,072.1	1,283.1	957.8
Monsanto.	1,033.0	1,113.0	938.0

Source: Battelle/R&D Magazine/Company information



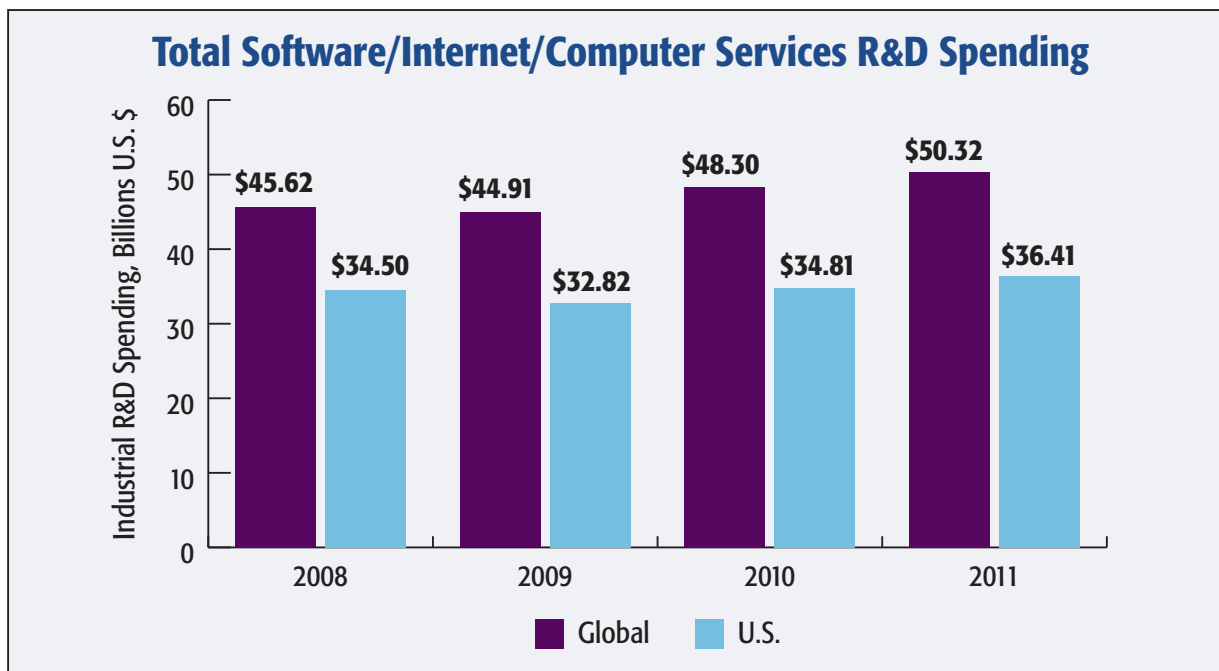
Source: Battelle, R&D Magazine, EU R&D Scoreboard



## Industrial R&D: Information Technologies

<b>Software/Internet/Computer Services</b>	2008	2009	Q1-Q3 2010
Top U.S. R&D Spenders	Millions, U.S. \$		
Microsoft Corp.	9,015.0	8,581.0	6,766.0
International Business Machines Corp.	6,337.0	5,820.0	4,448.0
Google Inc.	2,793.2	2,843.0	2,710.0
Oracle Corp.	2,776.0	2,775.0	2,989.0
Electronic Arts Inc.	1,343.0	1,250.0	863.0
Yahoo Inc	1,221.8	1,210.2	804.4
Symantec Corp.	868.3	865.5	632.0
Activision Blizzard	592.0	627.0	366.0
Intuit	561.7	567.0	n/a
Adobe Systems Inc.	662.1	565.1	509.9

Source: Battelle/*R&D Magazine*/Company information



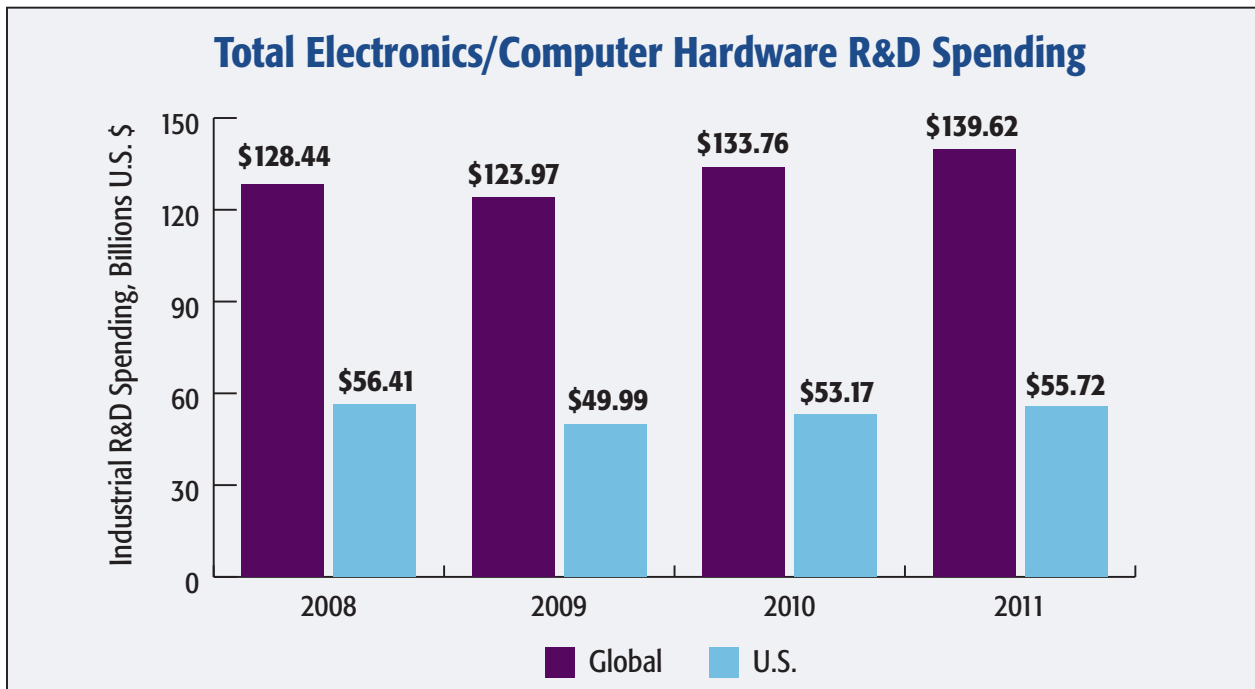
Source: Battelle, *R&D Magazine*, EU R&D Scoreboard



## Industrial R&D: Electronics/Computers

<b>Electronics/Computer Hardware</b>	2008	2009	Q1-Q3 2010
Top U.S. R&D Spenders	Millions, U.S. \$		
Intel Corp.	5,722.0	5,653.0	4,905.0
Cisco Systems Inc.	5,518.0	4,994.0	4,233.0
Motorola, Inc.	4,109.0	3,183.0	2,156.0
EMC Corp.	3,006.9	2,829.6	1,395.9
Hewlett-Packard Co.	3,185.0	2,768.0	n/a
Qualcomm Inc.	2,373.0	2,432.0	1,953.0
Advanced Micro Devices	1,848.0	1,721.0	1,053.0
Broadcom	1,497.7	1,534.9	1,290.1
Texas Instruments Inc.	1,940.0	1,476.0	1,178.0
Apple, Inc.	1,178.0	1,416.0	1,384.0

Source: Battelle/*R&D Magazine*/Company information



Source: Battelle, *R&D Magazine*, EU R&D Scoreboard



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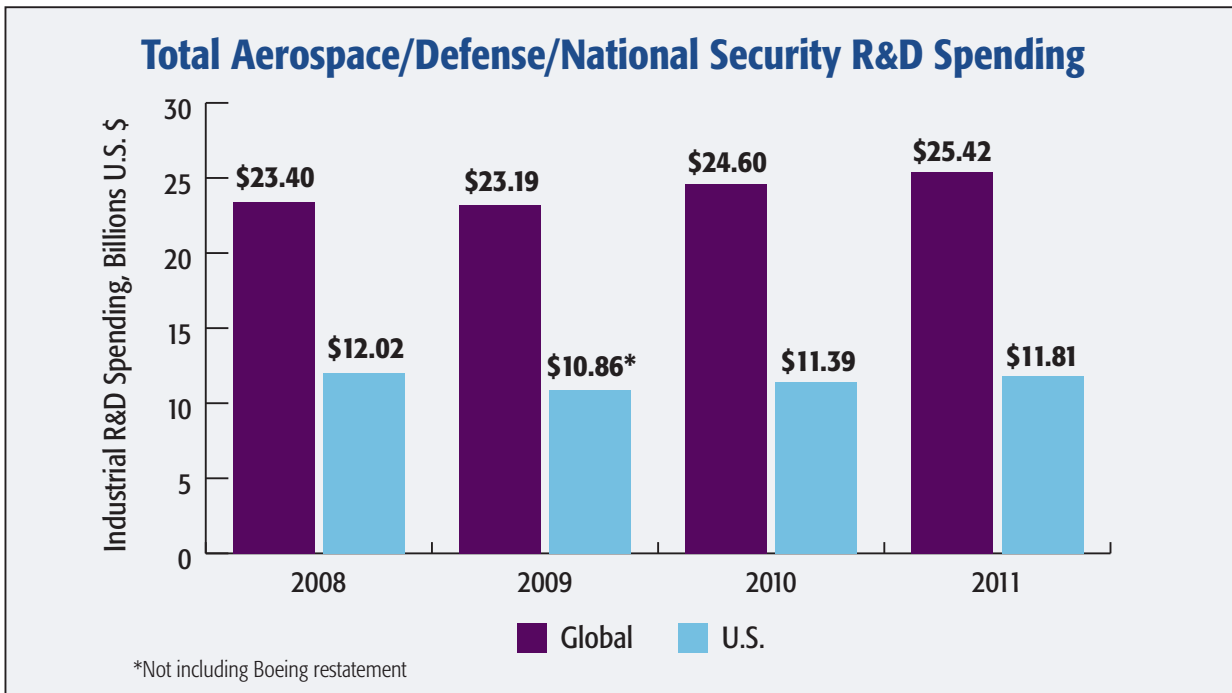
## R&D FUNDING FORECAST



### Industrial R&D: Aerospace/Defense/Security

<b>Aerospace/Defense/National Security</b>	2008	2009	Q1-Q3 2010
Top U.S. R&D Spenders	Millions, U.S. \$		
Boeing Co.	3,768.0	6,506.0	2,987.0
Northrop Grumman Corp.	564.0	610.0	n/a
Lockheed Martin	719.0	750.0	n/a
Raytheon	517.0	565.0	n/a
General Dynamics	474.0	520.0	n/a
Textron	966.0	844.0	n/a
Rockwell Collins	393.0	355.0	n/a
B.F. Goodrich	284.0	239.0	n/a
L-3 Communications	254.0	257.0	n/a
BE Aerospace	131.4	102.6	81.2

Source: Battelle/*R&D Magazine*/Company information



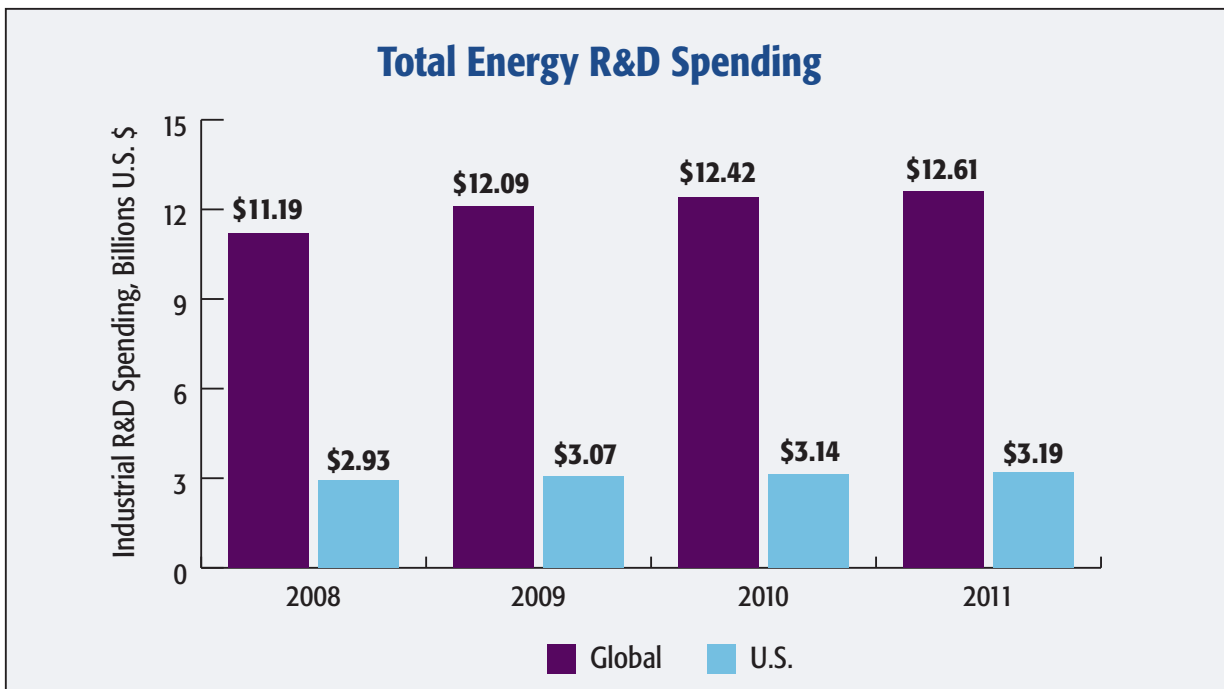
Source: Battelle, *R&D Magazine*, EU R&D Scoreboard



## Industrial R&D: Energy

<b>Energy</b>	2008	2009	Q1-Q3 2010
Top U.S. R&D Spenders	Millions, U.S. \$		
Exxon Mobil	847.0	1,050.0	n/a
Chevron	702.0	603.0	n/a
ConocoPhillips	209.0	190.0	n/a
USEC	110.2	118.4	80.3
First Solar	33.5	78.2	67.2
Cree	66.9	75.1	66.6
McDermott International	40.1	54.2	n/a
A123	37.0	48.3	27.9
SunPower	21.5	31.6	n/a
FuelCell Energy	21.6	20.2	n/a

Source: Battelle/R&D Magazine/Company information



Source: Battelle, R&D Magazine, EU R&D Score-

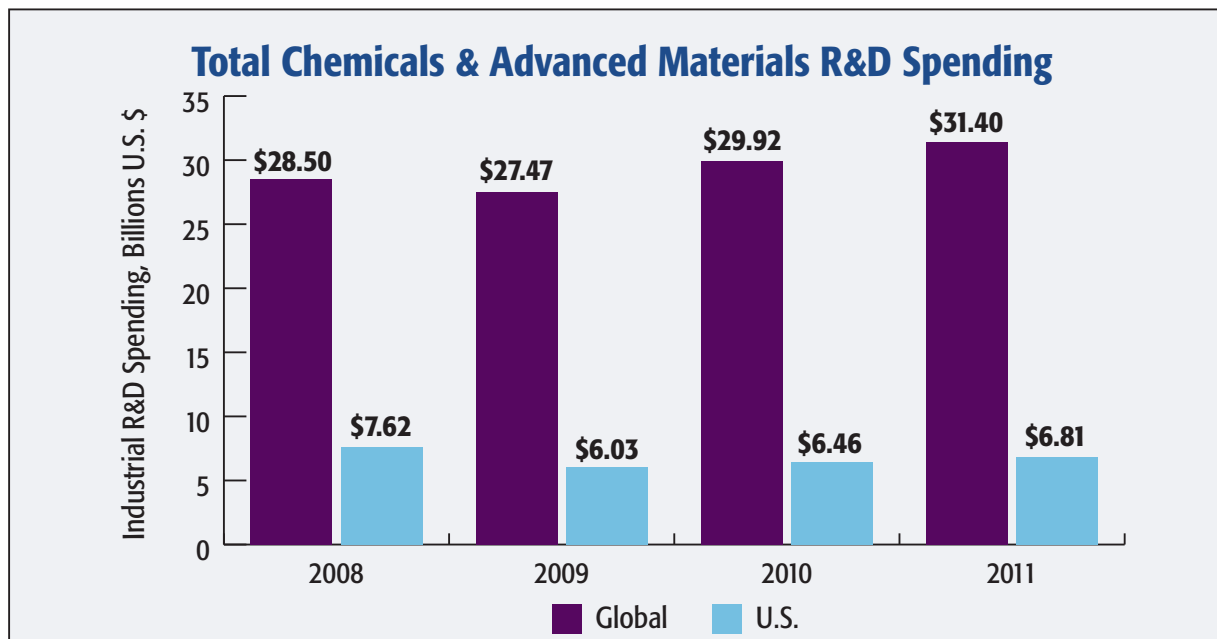




### Industrial R&D: Advanced Materials

<b>Chemicals &amp; Advanced Materials</b>	2008	2009	Q1-Q3 2010
Top U.S. R&D Spenders	Millions, U.S. \$		
3M Co.	1,404.0	1,293.0	1,046.0
DuPont	1,393.0	1,378.0	1,178.0
Dow Chemical	1,310.0	1,492.0	1,217.0
PPG Industries	451.0	388.0	290.0
Lubrizol	220.9	212.1	160.3
ALCOA	246.0	169.0	124.0
Huntsman International LLC	154.0	145.0	111.0
Eastman Chemical Co.	158.0	137.0	115.0
Air Products & Chemicals Inc.	134.2	110.3	87.5
Praxair	97.0	74.0	56.0

Source: Battelle/*R&D Magazine*/Company information



Source: Battelle, *R&D Magazine*, EU R&D Scoreboard