

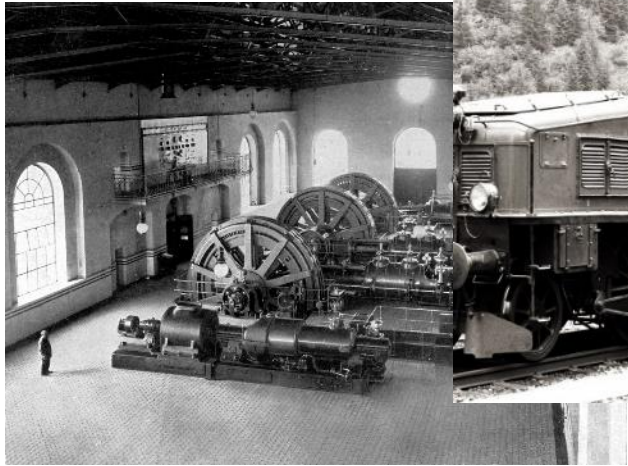
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ABB, LISTOPAD 2019

ABB

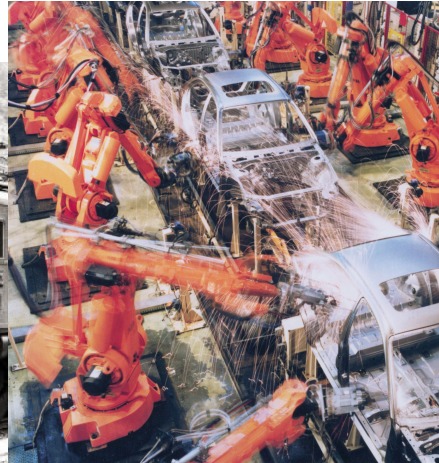
Martin Němeček, Motion Business Manager



We have always been writing the future of industries...



19th century

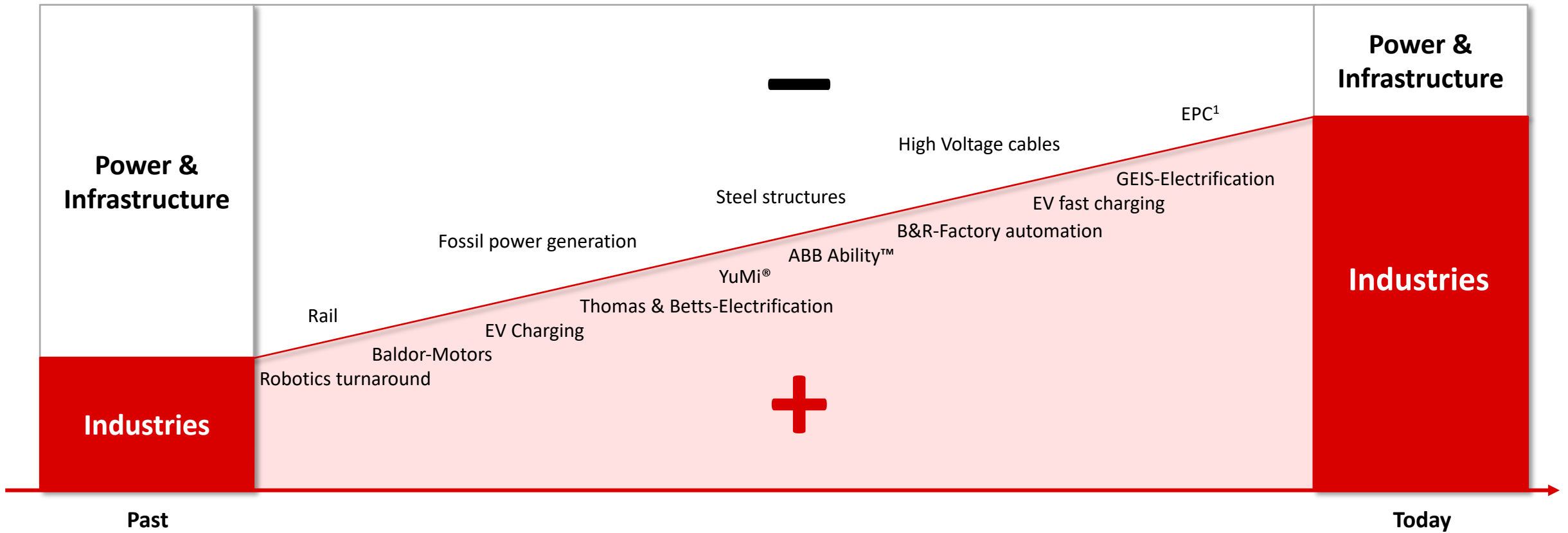


20th century



21st century

...by shifting the center of gravity of our portfolio



We delivered on our ambition and jointly built four market-leading divisions

Power Grids



Electrification Products



Industrial Automation



Robotics and Motion



Global
position
today

#1

#2

#2

#2 & #1

We focus ABB on digital industries and divest Power Grids

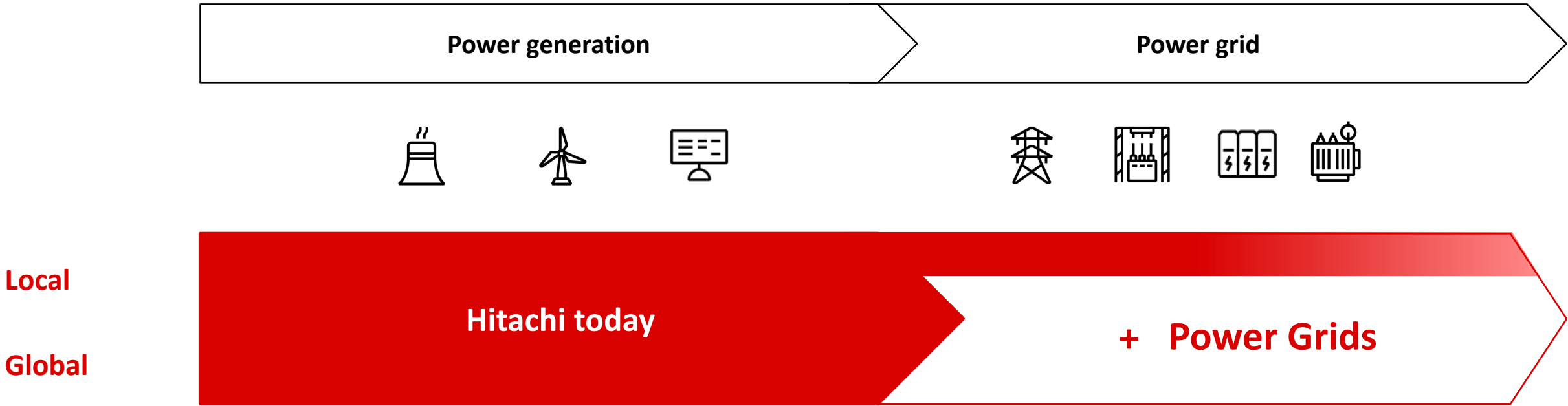


**Divesting Power Grids to
Hitachi**

“new ABB” – focusing in digital industries

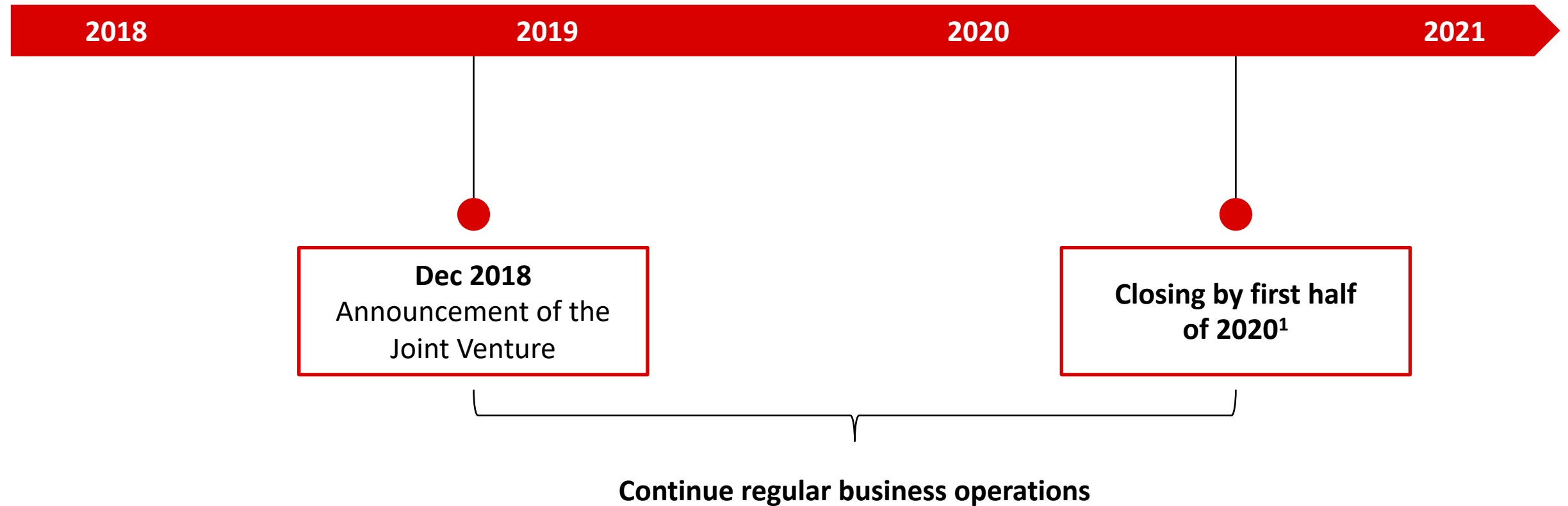


Creating a global leader in power grids

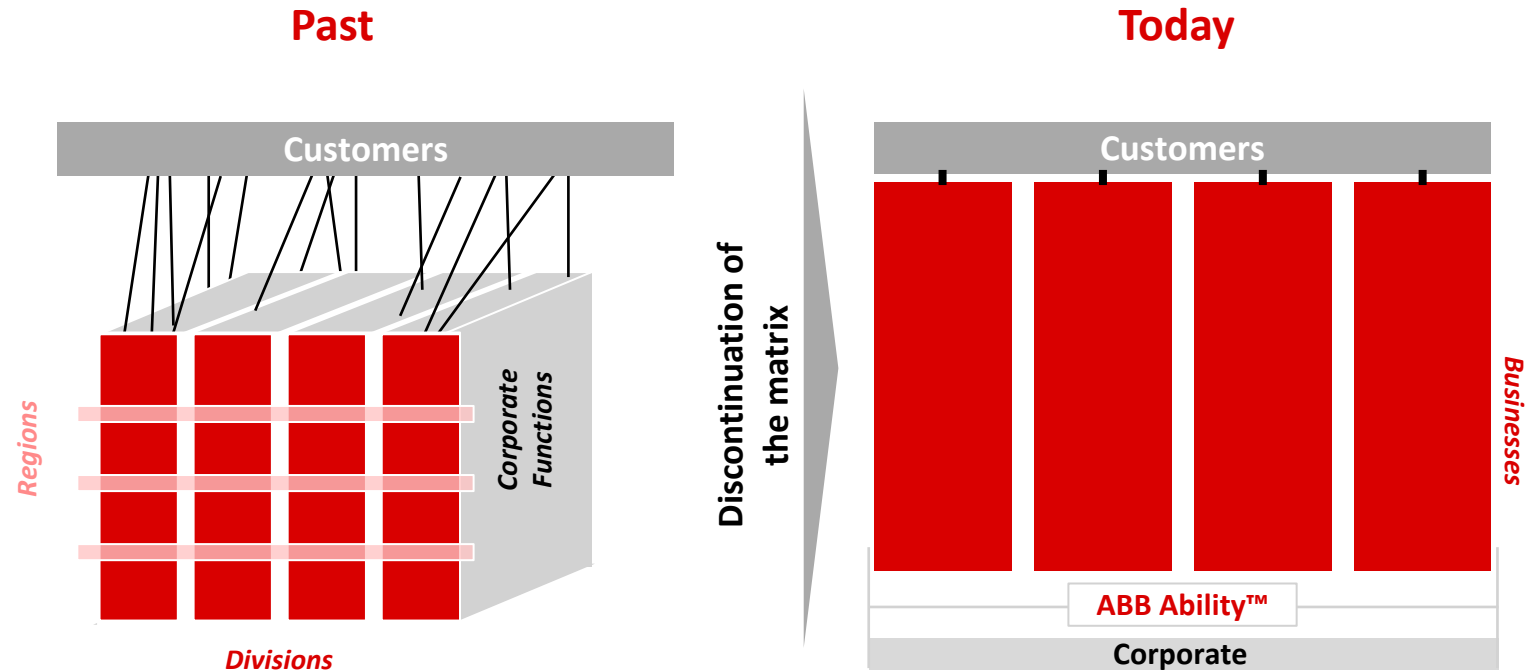


Power Grids is key to Hitachi’s vision in power

Until closing, Power Grids to be fully owned and run by ABB



Full empowerment of businesses through continued simplification...



The new ABB



Pioneering technology leader in digital industries

~\$410 bn market

~\$29 bn revenues

34%

Asia, Middle East and Africa

31%

Americas

35%

Europe

~110,000 employees

Shaping four focused leading businesses...

Effective April 1, 2019¹



Electrification

#2



Industrial Automation

#2



**Robotics &
Discrete Automation**

#2



Motion

#1

ABB Ability™

Electrification

Writing the future of safe, smart and sustainable electrification



Vladimír Janyпка

Our business

Global #2

\$13 bn revenues

Offering

- Low & medium voltage
- Buildings & infrastructure

Typical customers

- Electrical distributors
- Panel-builders
- EPCs¹

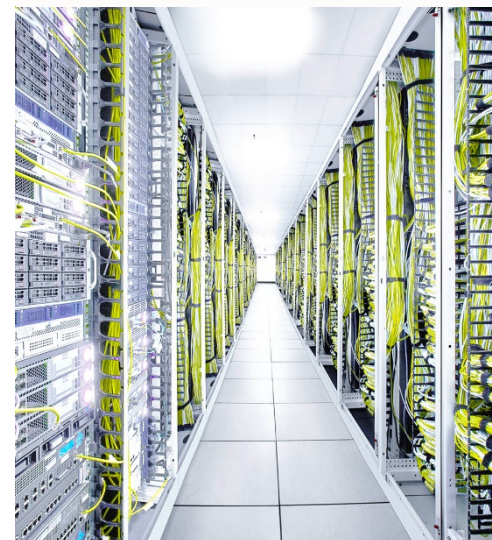
Market: \$160 bn; ~3% p.a.

Selected customer segments

Commercial buildings
4%+ p.a.



Data centers
6%+ p.a.



EV Charging
8%+ p.a.



Industrial Automation

Writing the future of safe and smart operations



Karel Buchta



Martin Červinka

Our business

Global #2

\$7 bn revenues

Offering

- Integrated industry-specific solutions
- Process control (DCS¹)
- Measurement & analytics

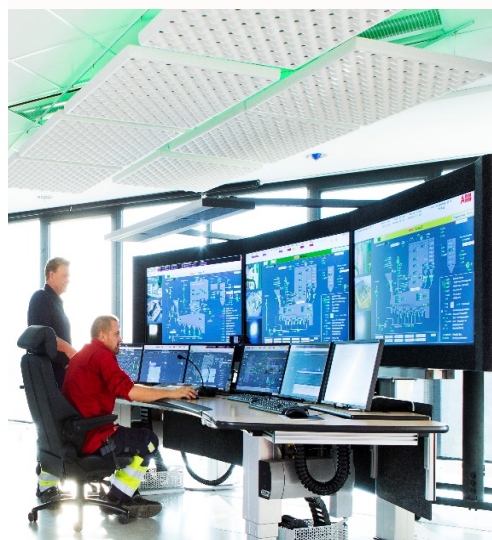
Typical customers

- End customers
- EPCs²

Market: \$90 bn; ~3 to 4% p.a.

Selected customer segments

Process control / DCS
~3% p.a.



Industry-specific solutions
~3-6% p.a.



Digital solutions & software
up to 10% p.a.



Robotics & Discrete Automation

Writing the future of flexible manufacturing and smart machines



Vítězslav Lukáš

Our business

Global #2

\$4 bn revenues

#1 Robotics player in China

Offering

- Machine & factory automation
- Robotics

Typical customers

- End customers
- Machinery OEMs¹
- System integrators

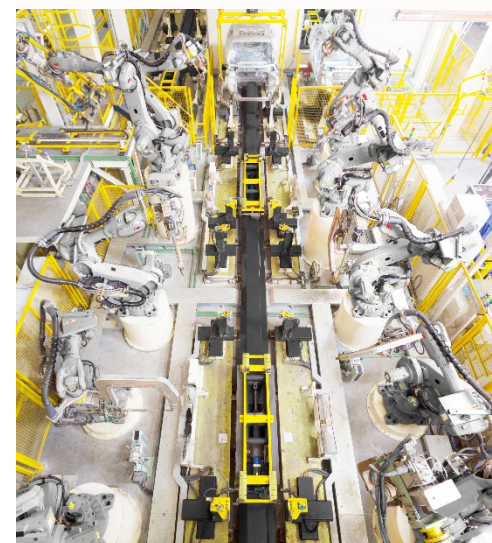
Market: \$80 bn; ~6 to 7% p.a.

Selected customer segments

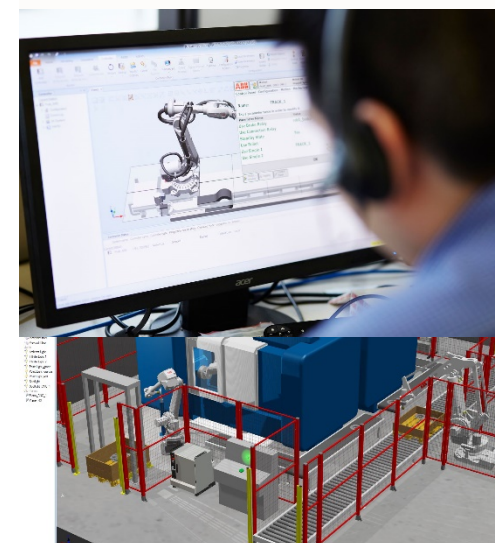
**Machine & factory
automation solutions**
5%+ p.a.



**Robotics / flexible
manufacturing**
~7% p.a.



Digital solutions & software
up to 10% p.a.



Motion

Writing the future of smart motion



Martin Němeček

Our business

Global #1

\$6 bn revenues

Offering

- Motors & generators
- Drives
- Digital powertrain solutions

Typical customers

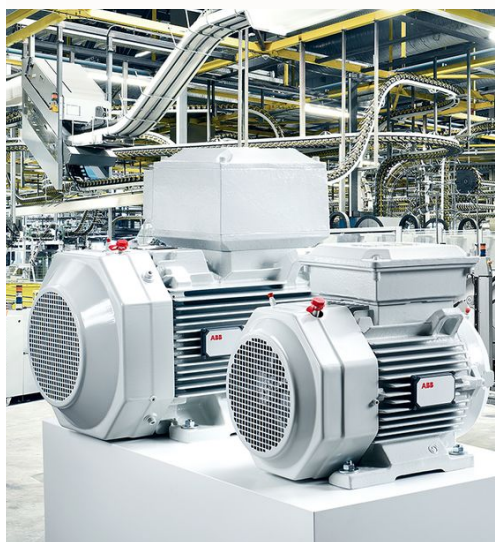
- Distributors
- OEMs¹
- End customers

Market: \$80 bn; ~3% p.a.

Selected customer segments

Motors

~2-3% p.a.



Drives

~4% p.a.



Digital powertrain

~8-10% p.a.



The new ABB: pioneering technology leader in digital industries

Writing the future. Together with you.



