

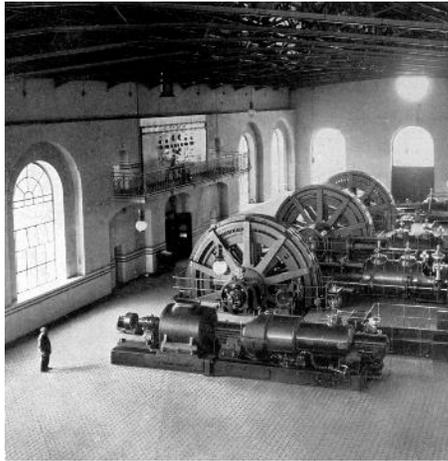
ABB, LISTOPAD 2019

**ABB**

Martin Němeček, Motion Business Manager



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



**19<sup>th</sup> century**

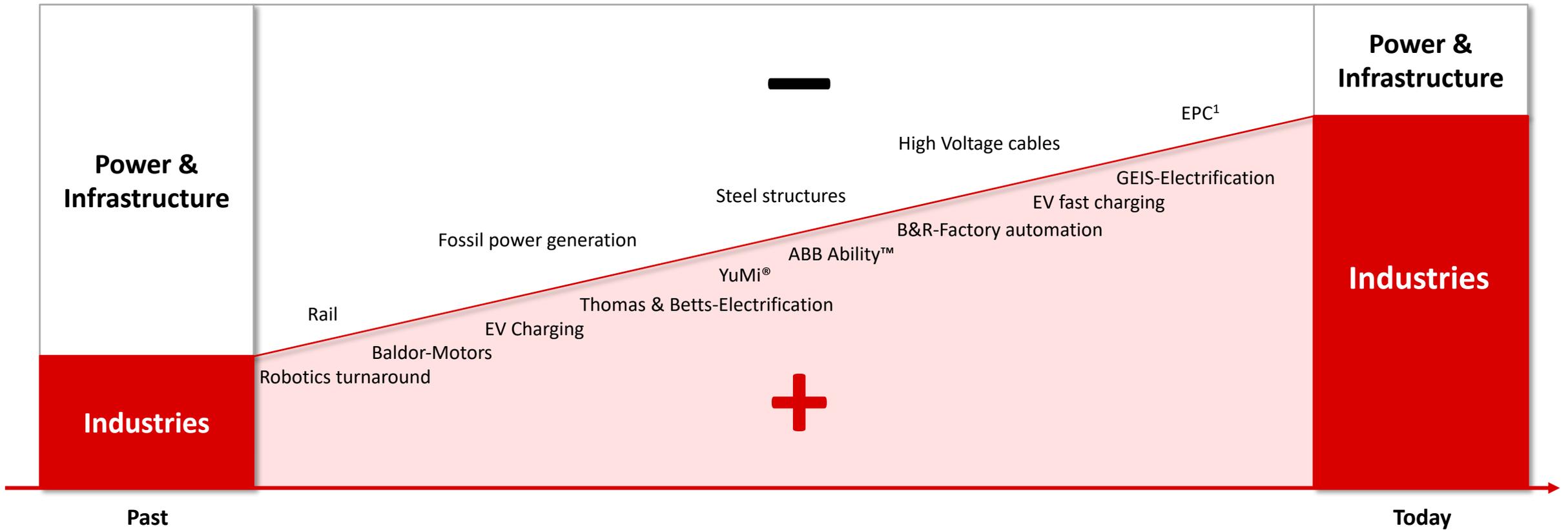


**20<sup>th</sup> century**



**21<sup>st</sup> 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**

—

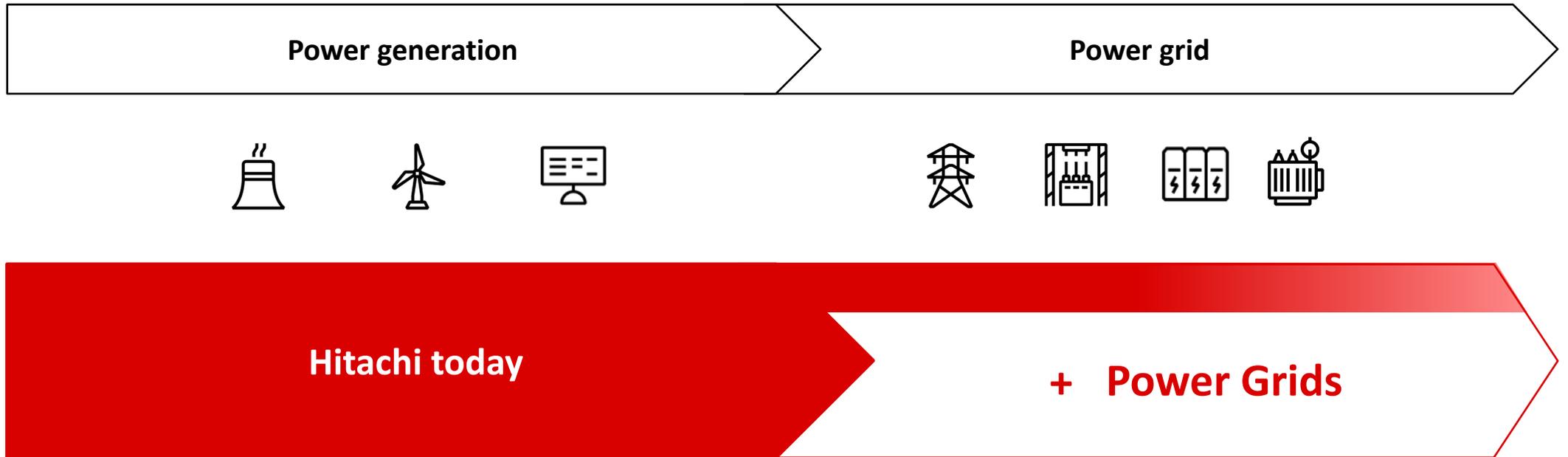
# We focus ABB on digital industries and divest Power Grids



**Divesting Power Grids to Hitachi**

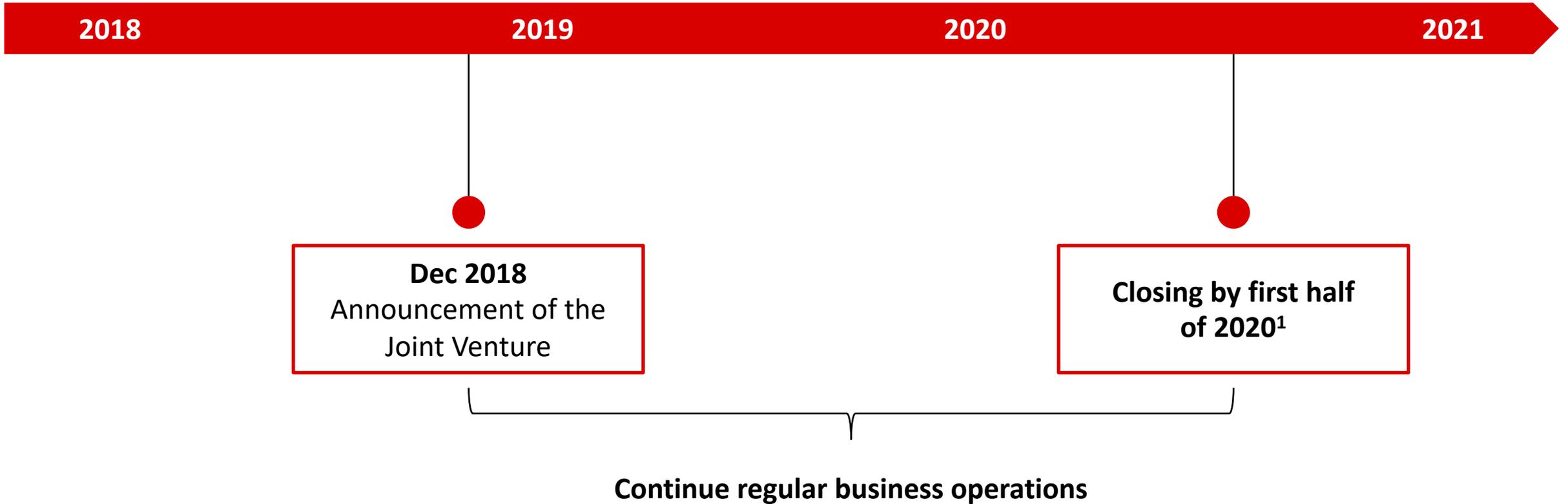
**“new ABB” – focusing in digital industries**

# Creating a global leader in power grids

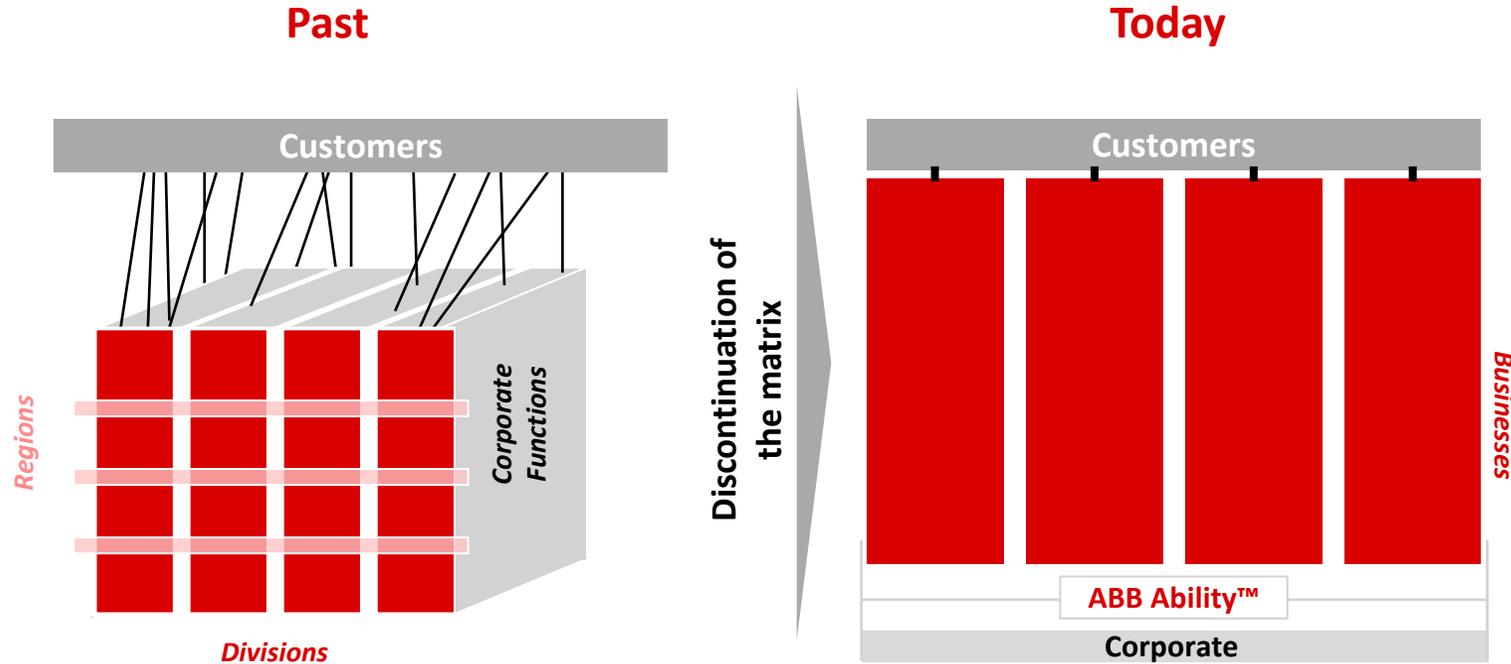


**Power Grids is key to Hitachi's vision in power**

## 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, 2019<sup>1</sup>



**Electrification**

**#2**



**Industrial Automation**

**#2**



**Robotics &  
Discrete Automation**

**#2**



**Motion**

**#1**

**ABB Ability™**

# Electrification

Writing the future of safe, smart and sustainable electrification



Vladimír Janyčka

## Our business

**Global #2**  
**\$13 bn revenues**

### Offering

- Low & medium voltage
- Buildings & infrastructure

### Typical customers

- Electrical distributors
- Panel-builders
- EPCs<sup>1</sup>

**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 (DCS<sup>1</sup>)
- Measurement & analytics

### Typical customers

- End customers
- EPCs<sup>2</sup>

**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 OEMs<sup>1</sup>
- System integrators

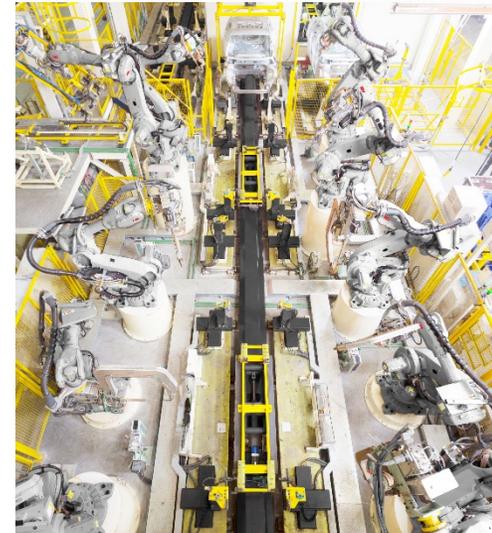
Market: \$80 bn; ~6 to 7% p.a.

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
- OEMs<sup>1</sup>
- End customers

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

Selected customer segments

### Motors

~2-3% p.a.



### Drives

~4% p.a.



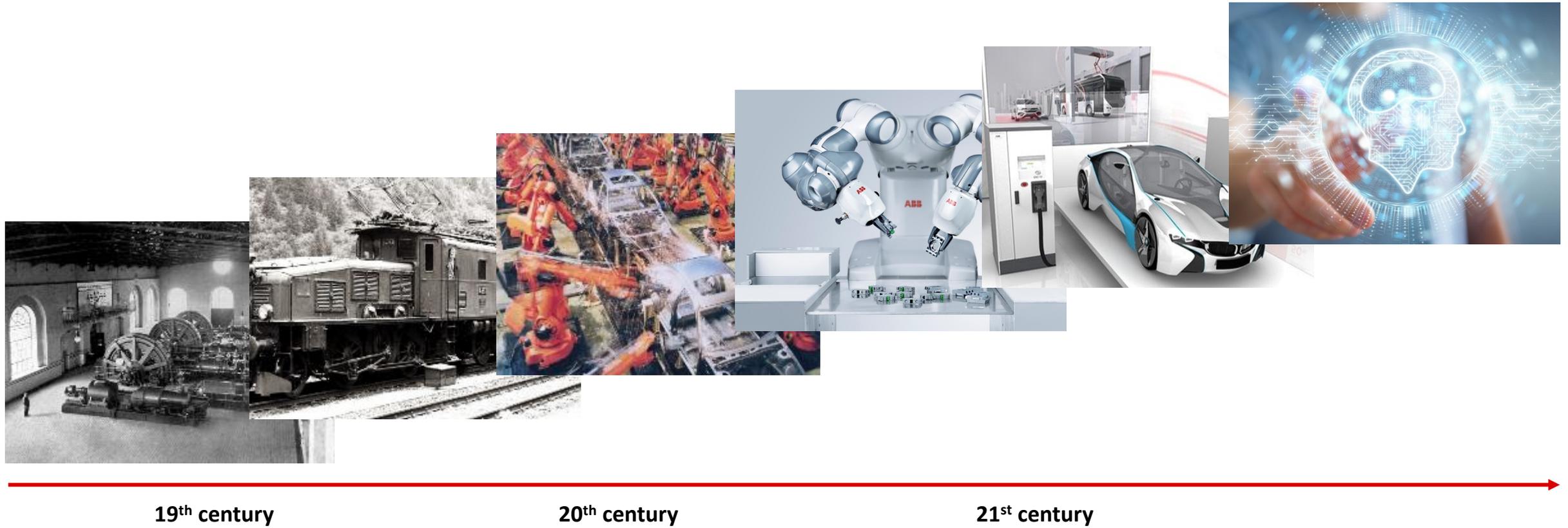
### Digital powertrain

~8-10% p.a.



# The new ABB: pioneering technology leader in digital industries

Writing the future. Together with you.



19<sup>th</sup> century

20<sup>th</sup> century

21<sup>st</sup> century

