

NOVEMBER 6, 2019 | BERGAMO - DALMINE, ITALY

ABB Electrification

ABB's Electrification business delivers safe, smart and sustainable electrification.

Key market drivers and trends:

- Electricity demand growing
2X faster than other energy sources
 - Integration of distributed generation (renewables, storage)
 - New consumption points (data centers, electric vehicles, emerging markets)
- Industry 4.0 facilitating and accelerating demand for intelligent solutions
- Urbanization and population growth

Select customer segments



~4%+ p.a.
Commercial buildings



~6%+ p.a.
Data centers



~8%+ p.a.
E-mobility

Market:

\$160 bn

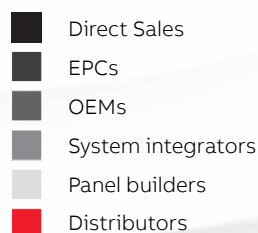
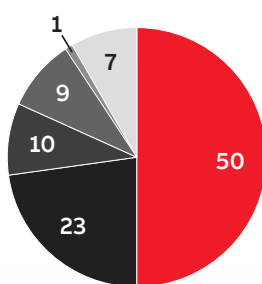
Market growth:

~3% p.a.¹

Electrification facts and figures:

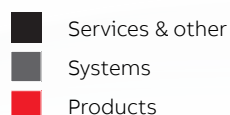
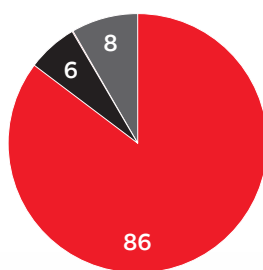
Channels

Approximation, % of revenues



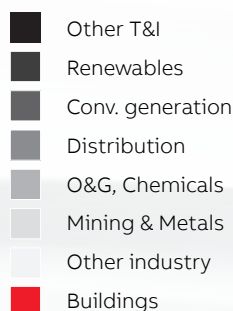
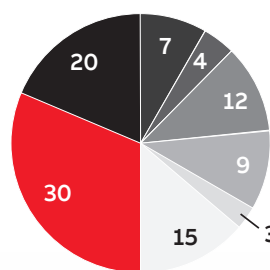
Offering

Approximation, % of revenues



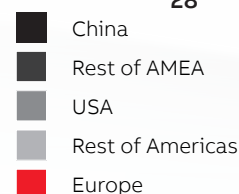
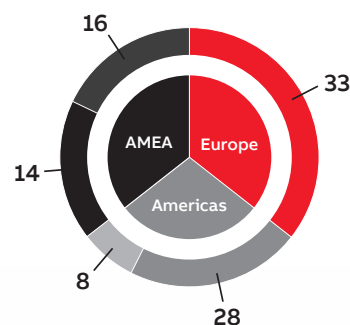
Customers^{2,3}

Approximation, % of revenues



Geography²

Approximation, % of revenues



Revenues

\$13.0 bn²

Employees

~55k

1. 2017–2025 forecast CAGR

2. Including annualized GEIS based on H2-2018

3. ABB estimate

Note: pie charts cover full year 2018

Electrification business lines:



Distribution Solutions

Medium and low voltage control & protection products, systems & switchgear, automation & services

GEIS INTEGRATION

~\$5.0 bn¹

Customer value example:

Intelligent electrical distribution solutions for a hyperscale data center



Smart Power

Low voltage breakers & switches, motor & power protection, electric vehicle charging infra & service

GEIS INTEGRATION

~\$3.0 bn¹

Customer value example:

Power monitoring combined protection & safety for a chain of branch offices



Smart Buildings

Miniature breakers, distribution enclosures, wiring accessories, building automation

GEIS INTEGRATION

~\$3.0 bn¹

Customer value example:

Smart automation solution for lighting, HVAC & access control for a hotel



Installation Products

Wire & cable management, termination, fittings and other accessories

~\$2.0 bn¹

Customer value example:

Complete set of cable management products for a distribution utility

1. Management estimates for business line revenues over last twelve months including GEIS, unconsolidated basis and excluding solar inverters.