



WELCOME TO ABB CANADA

OCTOBER 2025

CORPORATE PRESENTATION

ENGINEERED
TO OUTFIT

ABB AT A GLANCE

ABB is a global technology leader in electrification and automation, enabling a more sustainable and resource-efficient future.

By connecting its engineering and digitalization expertise, ABB helps industries run at high performance, while becoming more efficient, productive and sustainable so they outperform. At ABB, we call this 'Engineered to Outrun'. The company has over 140 years of history and around 110,000 employees worldwide. In Canada, ABB is driven by approximately 3,300 talented employees in our 32 locations.

[ABB.CA](https://www.abb.ca)



ENGINEERED TO OUTFRAN

Industries are the beating heart of the modern world. From energy, power and mining to building, transport, manufacturing, and more – they need to meet the global demand, be more sustainable, efficient, and manage transitions. To them, “running” is no longer enough – they need to outperform.

With our leading technologies in electrification and automation, we help all industries run at high performance and become more productive, efficient and sustainable to outperform.

At ABB, we call this **‘Engineered to Outrun’**.



ABB CANADA

Key Highlights



Region headquarters
Montreal, Quebec



~ 3,300 employees
in Canada



16
manufacturing
& assembly
locations



Global Centre for
Emergency Lighting
R&D



Over ~100 years
of technological
innovation in Canada



17
sales & service
locations



32 locations
coast to coast



Over 70 million digitally
enabled devices that
create the foundation
of the IIoT



Ranked in top 100
Canada's Best Employers
(2021 to 2025)



North American
Center of Excellence
for E- Mobility



Close to \$370K
given to Canadian
communities in 2024

CANADIAN HISTORY

Over 100 years of technology innovation

CANADA

1930

ASEA is **officially incorporated**, and BBC is **established** in Canada

1970

BBC inaugurates the Varennes **High Voltage Transformer factory**

2016

ABB invest \$35 million to build **high-tech facility** in Quebec City

1950

BBC erects its **first factory** in Canada

1988

ASEA and BBC Canada **merge to form ABB**

2016

ABB invests \$90 million to create state-of-the-art **300,000 square foot headquarters** in Montreal

CANADIAN HISTORY

Strategically growing in the markets we serve

BALANCE THROUGH STRATEGIC ACQUISITIONS

1989

ABB acquires the **Westinghouse** transmission & distribution business, marking ABB's entrance to North American power and industrial market

1999

ABB acquires **Elsag Bailey** (US \$2 bn), supporting growth in various process industries

2009

ABB acquires **Sinai Engineering Corporation**, to enhance its presence and capabilities in Western Canada

2011

ABB acquires **Baldor** (US \$4.2 bn), supporting growth with industrial motors and drives

2012

ABB acquires **Thomas & Betts** (US \$3.9 bn), supporting growth with distributors and electrification products

2017

ABB acquires **B&R** to close the gap in machine and factory automation, creating a comprehensive automation portfolio

1990

ABB acquires **Bomem Inc.** a leader in FTIR technologies, pushing the envelope for quality and precision of analytical products and systems

2008

ABB acquires **Ber-Mac Electrical and Instrumentation**, expanding its presence and capabilities in the oil and gas sector

2010

ABB acquires **Ventyx** (US \$1 bn), adding robust enterprise software to our portfolio

2011

ABB acquires **Envitech Energy** to strengthen its offering and solutions for the rail infrastructure market

2013

ABB acquires **Power-One** (US \$1 bn), supporting growth in renewable energy markets

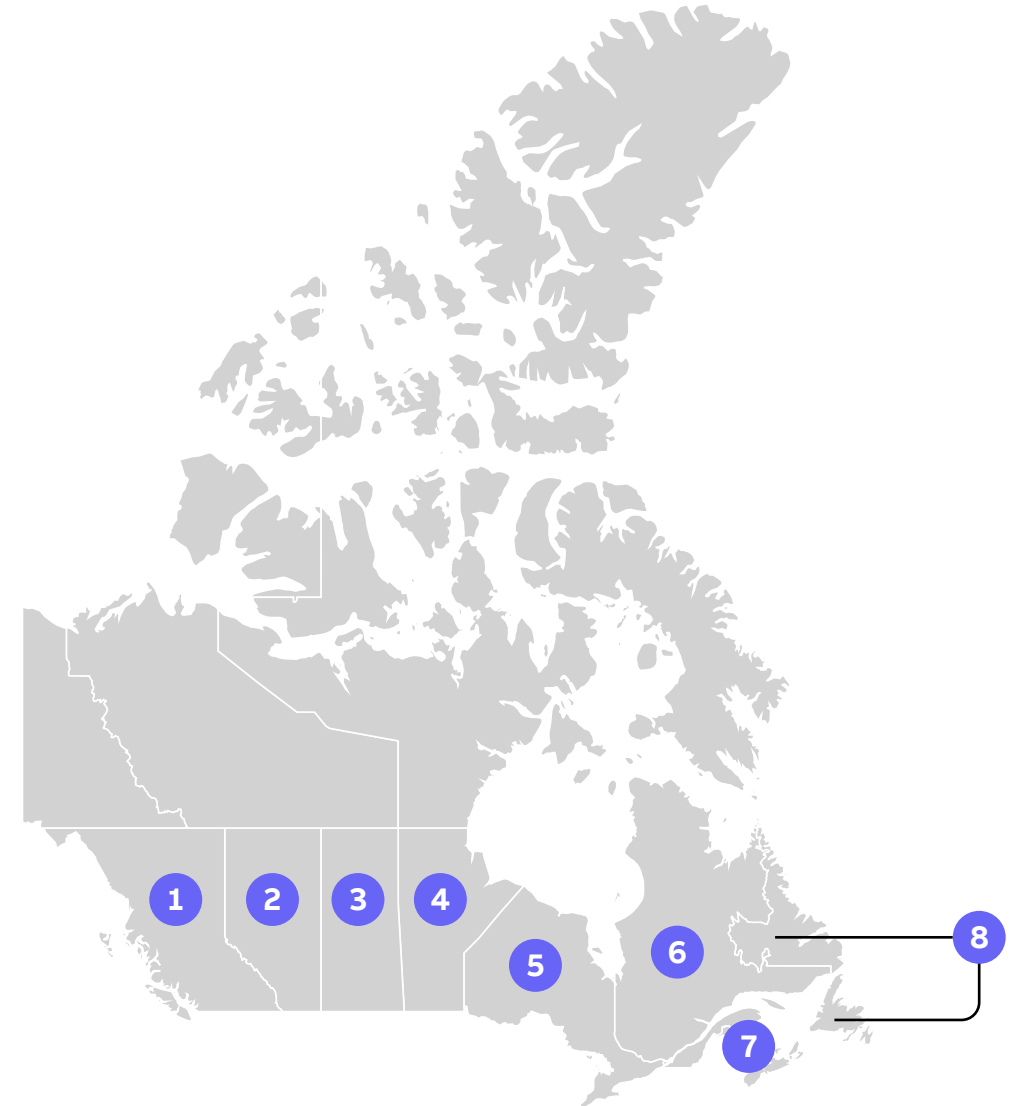
2018

ABB acquires **GEIS** (US \$2.6bn) supporting growth with electrification products

ABB CANADA LOCATIONS

42 functions across 32 locations

- 1 British Columbia: 2**
 - 1 sales & service location
 - 1 distribution center
- 2 Alberta: 7**
 - 2 manufacturing & assembly facility
 - 2 sales & service location
 - 3 distribution centers
- 3 Saskatchewan: 1**
 - 1 sales & service location
- 4 Manitoba: 1**
 - 1 sales & service location
- 5 Ontario: 15**
 - 5 manufacturing & assembly facility
 - 7 sales & service location
 - 3 distribution centers
- 6 Quebec: 14**
 - 9 manufacturing & assembly facility
 - 4 sales & service locations
 - 5 distribution centers
- 7 Nova Scotia: 1**
 - 1 sales & service location
- 8 Newfoundland and Labrador: 1**
 - 1 sales & service location



EMPLOYEES COAST TO COAST

- 1 British Columbia: 67
- 2 Alberta: 152
- 3 Saskatchewan: 8
- 4 Manitoba: 13
- 5 Ontario: 333
- 6 Quebec: 2,541
- 7 Nova Scotia: 14
- 8 Newfoundland and Labrador: 7

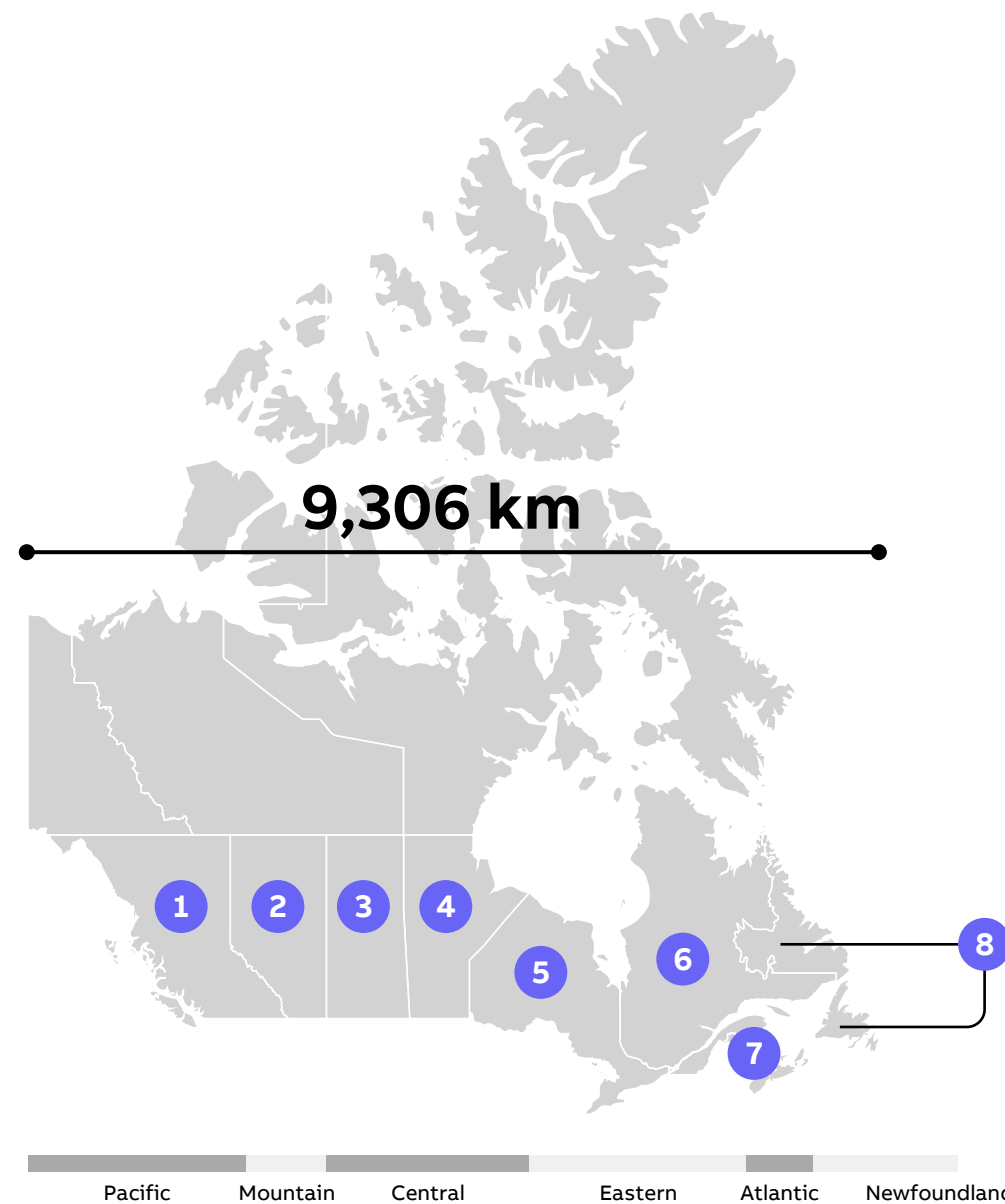


ABB PURPOSE

We enable a more sustainable and resource-efficient future with our technology leadership in electrification and automation



Creating
success



Addressing world's
energy challenges



Transforming
industries



Embedding
sustainability



Leading
with technology

ABB IN NUMBERS



~110,000

Employee globally



174

Nationalities



\$33.7 bn

Order intake



\$32.9 bn

Revenues



18.1%

Operational
EBITA margin



>170

Manufacturing
sites globally



\$1.5 bn

R&D investment



~22k

Granted patents



21.3%

Women in senior
management
positions



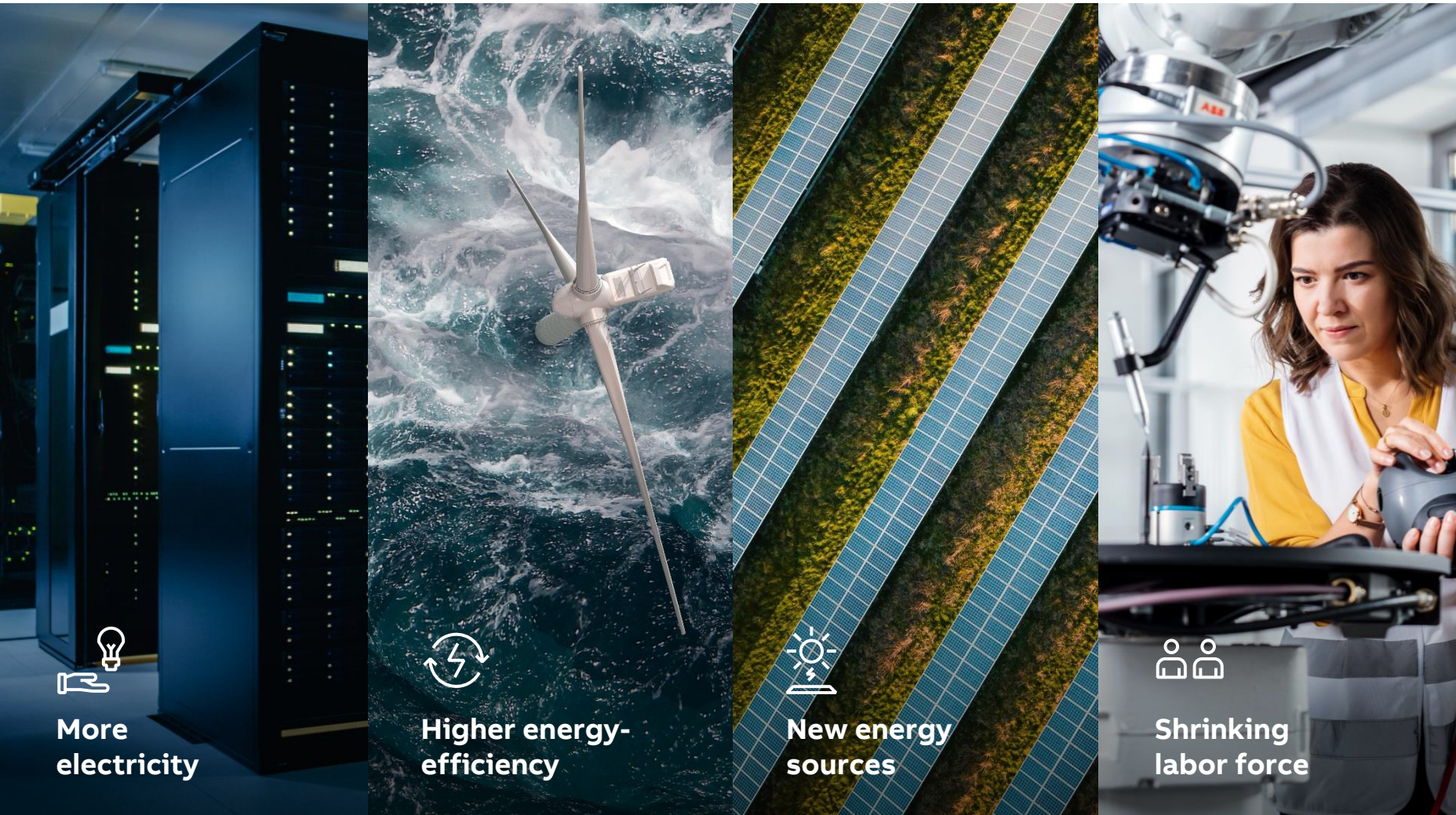
78%

Reduction of scope 1
and 2 GHG emissions
since 2019

140+
years history

ABB PURPOSE AND CUSTOMER OFFERING ALIGNED WITH SECULAR TRENDS

SECULAR TRENDS



OUR OFFERING

Supports customers to:

- Reduce waste and increase circularity
- Reduce carbon intensity
- Increase labor productivity
- Increase energy efficiency
- Increase flexibility
- Reduce footprint
- Reduce downtime
- Increase safety and improve working environment

SERVING CUSTOMERS FROM A WIDE RANGE OF INDUSTRIES

Deep domain expertise and a commitment to customer value



Agriculture



Automotive



Batteries



Building



Cement



Chemicals & refining



Data centers



Education



Electronics



Food & Beverage



Healthcare and Life Sciences



HVACR



Hydropower



Hydrogen



Logistics



Marine



Metals



Mining and minerals



Nuclear



OEM



Oil & Gas



Packaging



Ports



Pulp & Paper



Retail



Rubber and plastics



Solar



Space



Sustainable fuels



Transportation



Utilities



Waste Management



Water and wastewater



Wind

THE ABB WAY

Our operating model

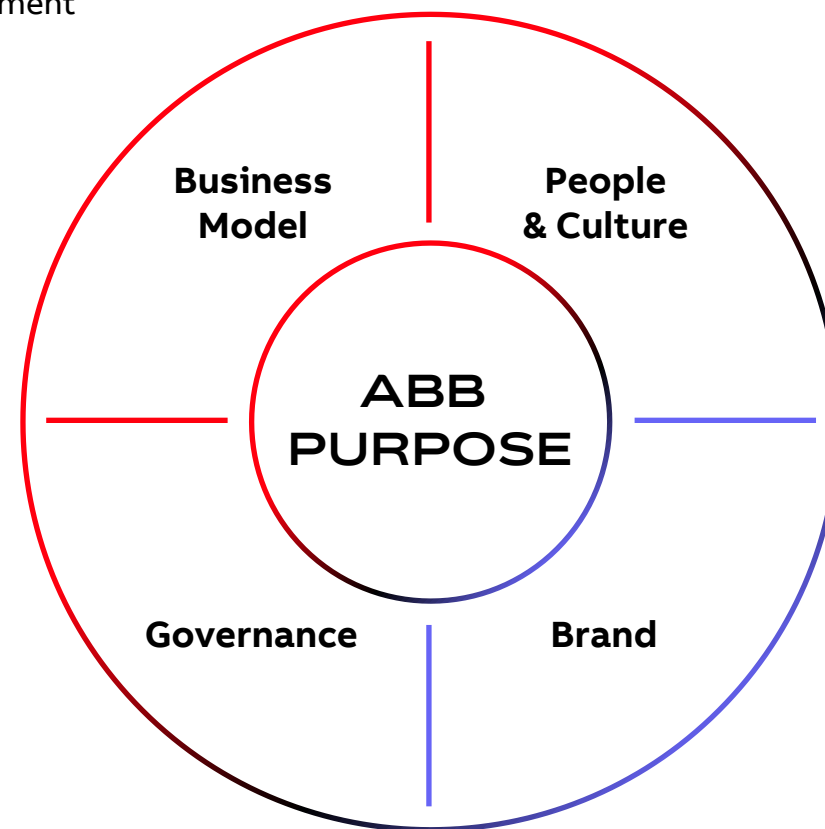
With our company purpose at its core, the **ABB Way empowers our divisions with full ownership and accountability** for their respective strategies, performance and resources, while serving as the “glue” that holds our Group together.

The ABB Way consists of two parts:

- “HOW”** we operate and create superior value, namely with our business model, people & culture, strong brand and governance
- “WHY”** we are in business: our purpose, which is to enable a more sustainable and resource-efficient future with our technology leadership in electrification and automation

Decentralized setup
Performance management
Capital allocation
Portfolio management

Values
People
Leadership



Code of Conduct
Internal controls & compliance
Risk management
Policies and procedures

Positioning
Reputation

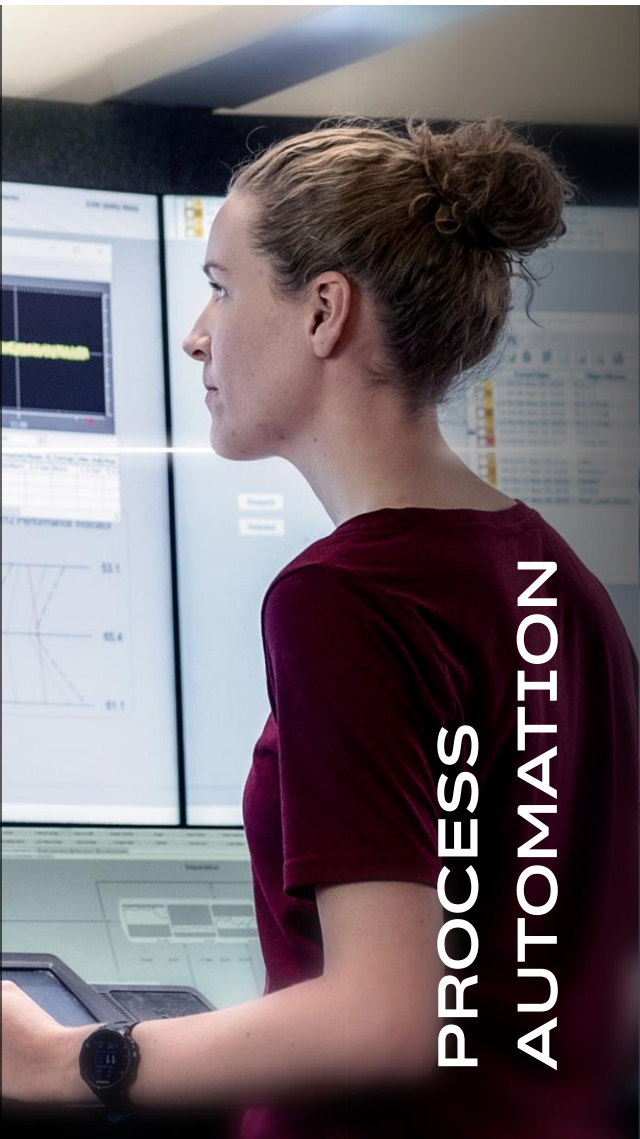
OUR BUSINESS AREAS



ELECTRIFICATION



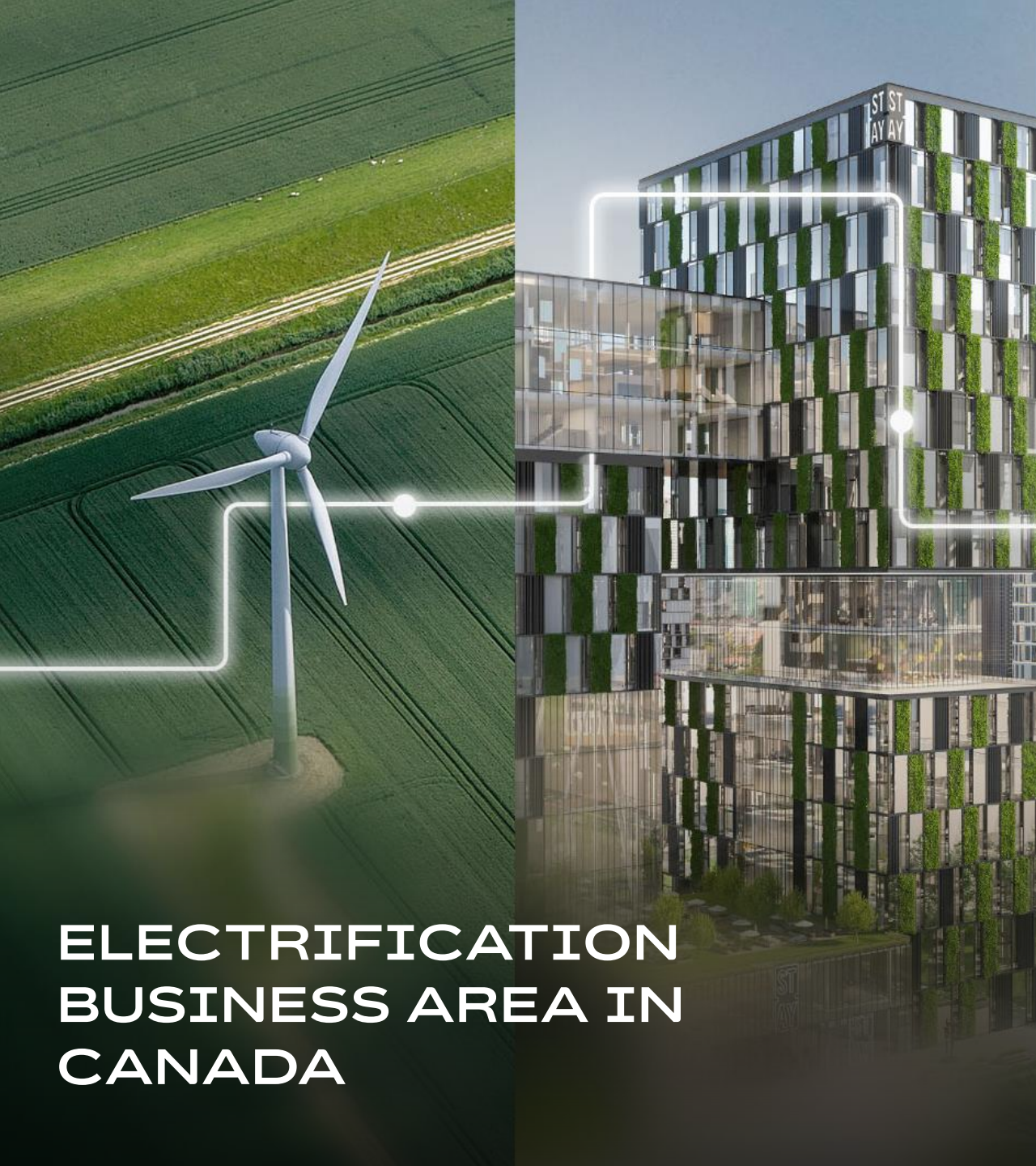
MOTION



PROCESS
AUTOMATION



ROBOTICS &
DISCRETE AUTOMATION



ELECTRIFICATION BUSINESS AREA IN CANADA

 **Revenues** \$15.4 bn

 **Employees** ~2021

 **Canada's
Market
Position** No. 2

Divisions

- Distribution Solutions
- Smart Power
- Smart Buildings
- Installation Products
- Service

ABB's Electrification business area in Canada is a technology leader enabling the efficient and reliable use of electricity from source to socket. We collaborate with our customers and partners to solve the world's greatest challenges in electrical distribution and energy management.

Our portfolio encompasses digital and connected innovations for low- and medium-voltage, including electric vehicle (EV) infrastructure, modular substations, distribution automation, power protection, wiring accessories, switchgear, enclosures, cabling, sensing and control. We also offer services to improve reliability, availability, predictability and sustainability of electrical systems.

CANADIAN HISTORY

Over 100 years of technology innovation

ELECTRIFICATION

- **2014** – ABB's Enviline traction power technology is selected for the Vancouver Evergreen Line Rapid Transit Project
- **2016** – ABB establishes Global Technology Development Center for Emergency Lighting in Quebec
- **2017** – ABB establishes North American Center for Excellence in E-Mobility in Montreal
- **2022** – ABB Canada a trusted partner in ventilation in Louis-Hippolyte Lafontaine tunnels of Montreal, with ABB drives, such as our ACS880-17
- **2024** – ABB completes a 50/50 joint venture with Niedax Group to launch Abnex Inc., expanding cable tray solutions across North America





MOTION BUSINESS AREA IN CANADA



Revenues \$7.8 bn



Employees ~165



**Canadian
market
position** No. 1

Divisions

- NEMA Motors
- IEC Motors
- Drive Products
- High Power
- Services

ABB's Motion business area in Canada is at the core of accelerating a more productive and sustainable future. We offer customers the complete range of electrical motors, drives, generators, and services, as well as integrated digital powertrain solutions. Therefore, we are able to provide our customers with energy efficient, decarbonizing and circular solutions to empower a low-carbon future.

We serve a wide range of automation applications in transportation, infrastructure and the discrete and process industries. Through our domain expertise and technology our customers achieve better performance, safety and reliability.

CANADIAN HISTORY

Over 100 years of technology innovation

MOTION

- **2003** – liquid cooled drives for tunnel boring machines, a custom solution for a Canadian customer. These tunnel machines are now used around the world
- **2004** – ACH550, a true HVAC 600v drive for the Canadian market. Improving Energy Efficiency in buildings and hospitals
- **2008** – ACS880 Active Front-End drives for Ultra-Low harmonics. With this technology, ABB kept power grids clean and providing outstanding motor performance!
- **2019** – Drives awarded a contract with Metrolinx to expand Toronto's Light Rail Transit system that will be 60% faster than current travel times
- **2023** – ABB supplied 13 ACS1000 MV drives with transformers and cooling units to replace gas compressors for Shell's net zero plan. ABB's \$15M share of the \$100M project includes upgrading electrical substations and transmission lines from BC Hydro. ABB also provided large motors for the project.





PROCESS AUTOMATION BUSINESS AREA IN CANADA

 **Revenues** \$6.8 bn

 **Employees** ~945

 **Canadian
market
position** No. 2

Divisions

- Energy Industries
- Process Industries
- Marine & Ports
- Measurement & Analytics

ABB's Process Automation business area in Canada enables customers to operate some of the largest and most complex industrial infrastructures, helping them outrun – leaner and cleaner.

We offer a broad range of automation, electrification and digital solutions for process, hybrid and maritime industries, including industry-specific integrated control and software as well as measurement and analytics solutions and services.

CANADIAN HISTORY

Over 100 years of technology innovation

PROCESS AUTOMATION

- **1999** – Measurement & Analytics marks its first export into space for Canadian Space Agency's MOPITT instrument launched by NASA
- **2003** – ABB develops VRS 3000 Underground Voltage Regulation Systems (UGVRS), first heavy-duty, skid-mounted, portable SVC designed to regulate voltage in mine distribution systems
- **2005** – ABB obtains contract to deliver North America's largest friction mine hoist for Mosaic's Esterhazy Potash Operation in Saskatchewan
- **2013** – ABB signs space contract with Harris to develop three additional interferometers for NASA's next generation LEO weather satellites
- **2018** – ABB enters the Space 2.0 market by winning contract from GHGSat to build highly innovative payloads for monitoring greenhouse gases from space
- **2021** – launched ABB Ability™ comprehensive natural gas leak and greenhouse gas measuring systems using an ultra sensitive OA-ICOS sensor
- **2022** – ABB wins its largest space contract to date with Earth Daily Analytics for satellite imaging technology to detect environmental change in near real time
- **2023** – ABB contracts with Seaspan's Vancouver Shipyard to deliver a complete propulsion system for the first of the Canadian Coast Guard's new-generation polar icebreakers, slated to be the world's largest and most powerful diesel-electric icebreaker in 2030





ROBOTICS & DISCRETE AUTOMATION BUSINESS AREA IN CANADA

 **Revenues** \$3.2 bn

 **Employees** ~75

 **Canadian
market
position** No. 2

Divisions

- Robotics
- Machine Automation

ABB's Robotics & Discrete Automation business area in Canada enables companies to outperform and become more resilient, flexible and efficient through our value-added solutions in robotics as well as machine and factory automation. With our integrated automation solutions, our application expertise across a wide scope of industries and our global presence, we deliver tangible customer value.

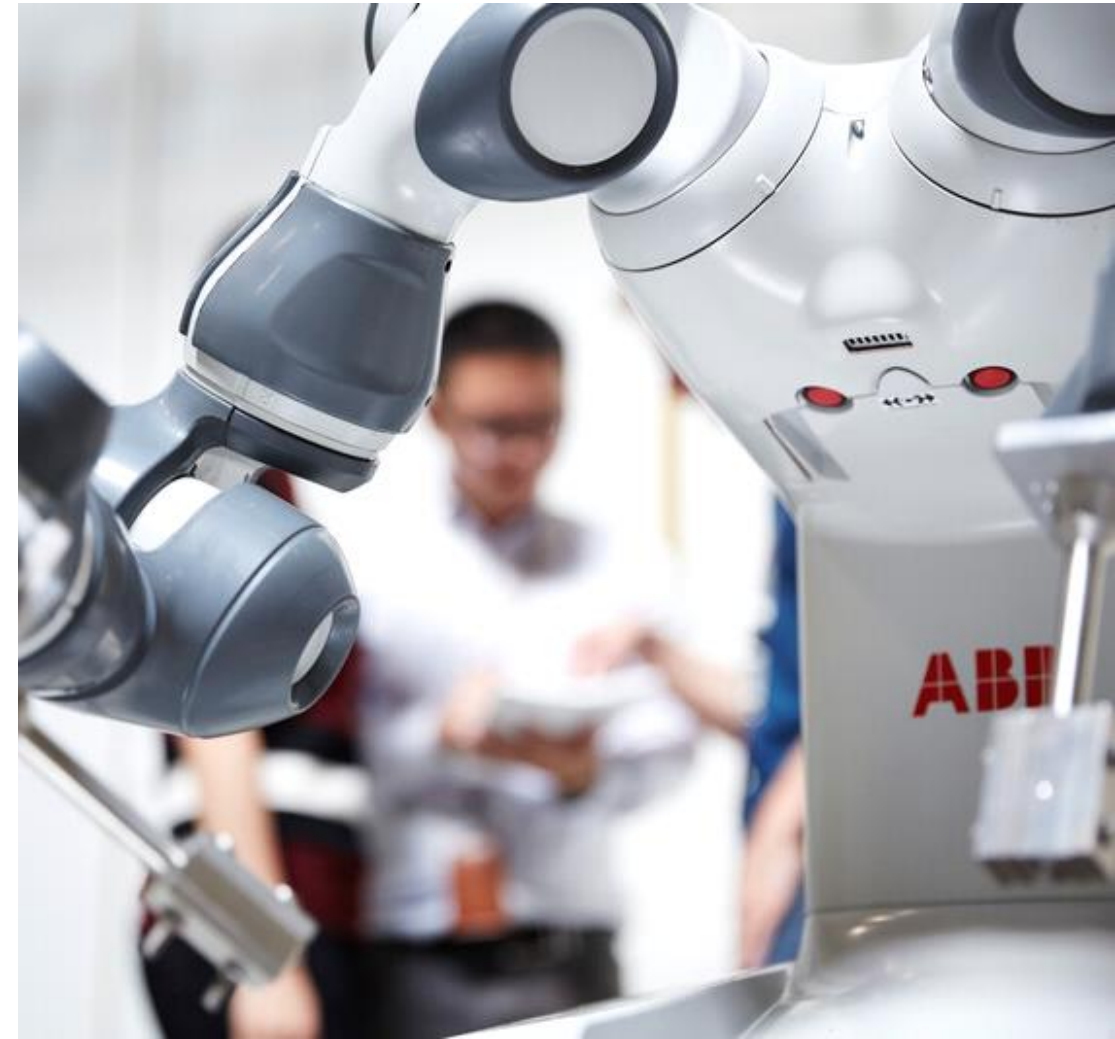
Our focus on innovation includes extensive work in artificial intelligence, as well as an ecosystem of digital partnerships and the expansion of our production and research capabilities.

CANADIAN HISTORY

Over 100 years of technology innovation

ROBOTICS & DISCRETE AUTOMATION

- **1994** – Ford Motor Co. Ltd. Awards major contract to ABB to provide sophisticated robot systems
- **1999** – ABB Robotics Canada develops innovative process for welding/processing plastic gas tanks for the automotive industry
- **2003** – General Motors awards contract to ABB to supply stamping line, automated de-stacking systems, end-of-line systems and robot integration for its plant in Lordstown, Ohio
- **2011** – ABB FlexArc products/cells are assembled and produced in Canada
- **2016** – first truly collaborative robot – YuMi – installed in Canada
- **2017** – ABB completes acquisition of B&R



AIMING TO MAINTAIN OR STRENGTHEN A NUMBER 1 OR 2 MARKET POSITION IN EVERY DIVISION'S RESPECTIVE MARKET SEGMENTS



Global market
position¹

Business Area

Division

No. 3



Electrification

- Distribution Solutions
- Smart Power
- Smart Buildings
- Installation Products
- Service

- E-mobility²

NO. 1



Motion

- NEMA Motors
- IEC Motors
- Drive Products
- High Power
- Services

NO. 2



Process
Automation

- Energy Industries
- Process Industries
- Marine & Ports
- Measurement & Analytics

NO. 2

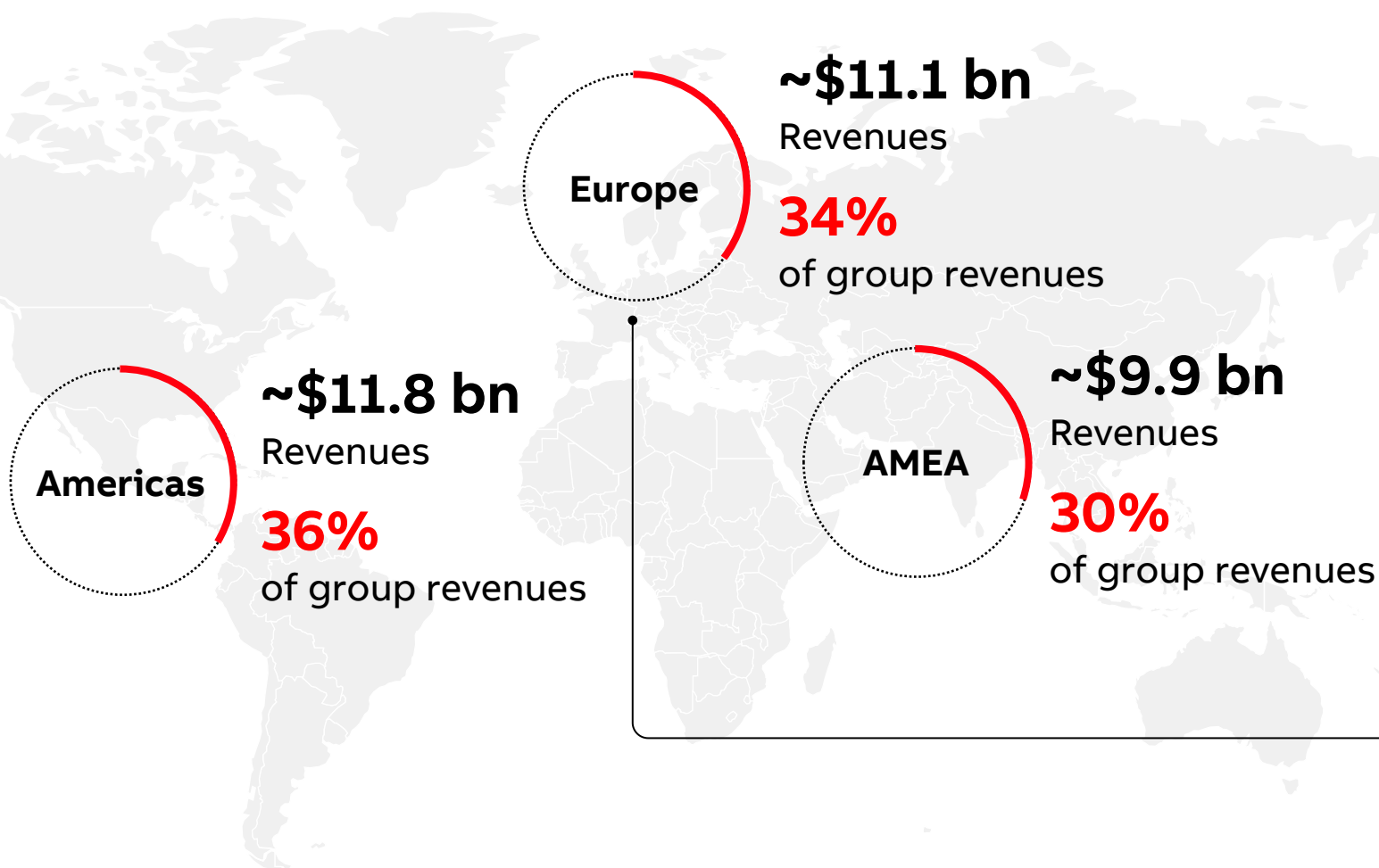


Robotics &
Discrete Automation

- Robotics
- Machine Automation

1. Check [Factsheet](#) for details
2. The E-mobility division, formerly part of the Electrification business area, has been an independent business and separate operating segment since January 2023. It is reported in “Corporate and Other”
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WELL-POSITIONED ACROSS GLOBAL MARKETS



Zurich, Switzerland
Global Headquarters

OUR PRIORITIES



**Market
leadership**



Technology



People



**Portfolio
management**



Sustainability



**Financial
performance**

CREATING VALUE THROUGH WORLD-CLASS TECHNOLOGY

Our priorities
Technology



>\$1.4 bn

R&D investment
in 2024

4.5%

Revenues invested in
R&D in 2024

~7,800

R&D employees

>750

Priority patents filed in
2024

~22k

Granted patents

~6k

Pending patent
applications

9

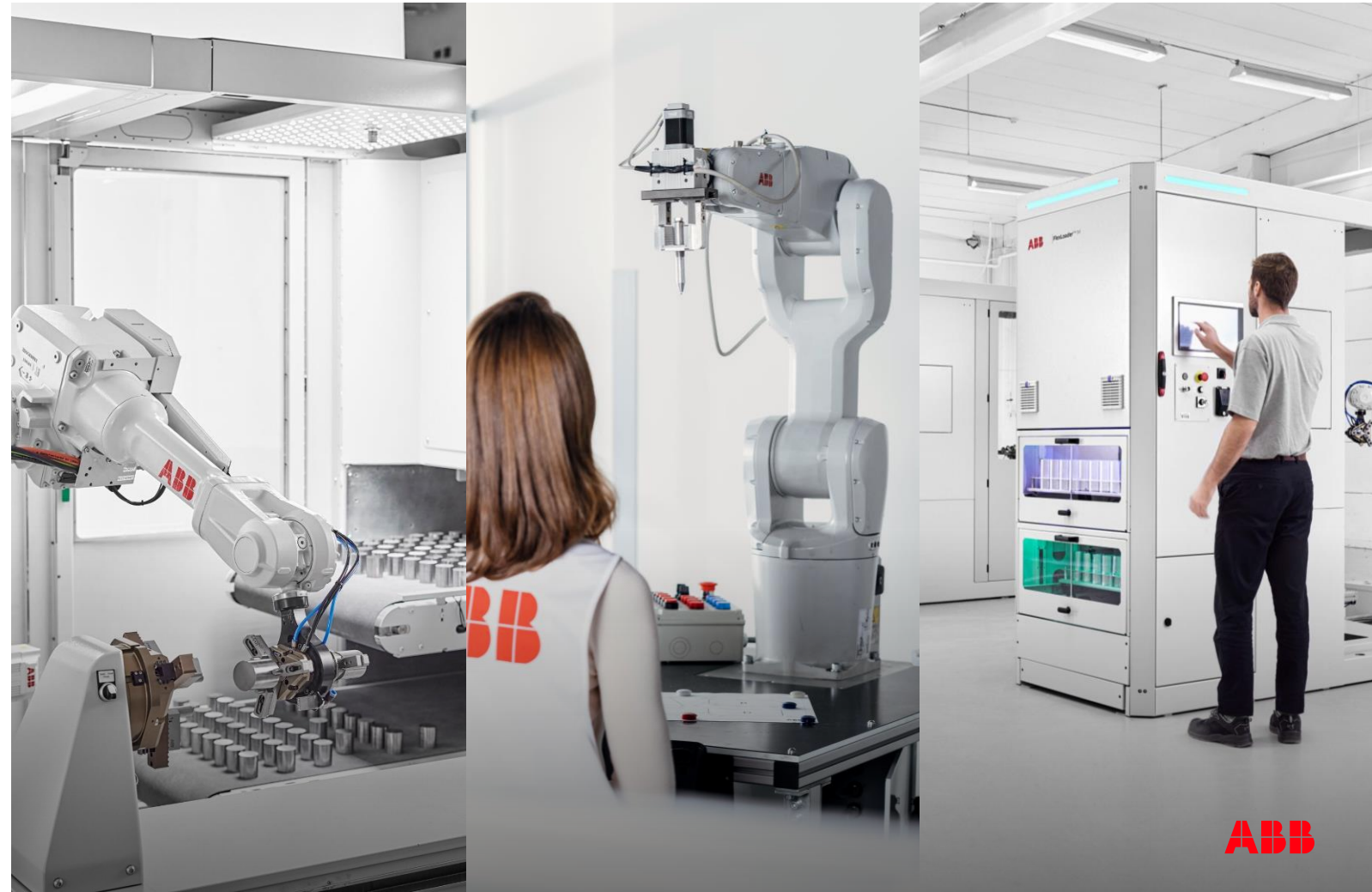
Venture investments
in 2024

~\$50 mn

Venture investments
in 2024

~2,000

Secondary patents
filed in 2024



SOFTWARE, DIGITALIZATION, AI

Embedded in products to create customer value

>50% of our R&D employees in software development.

>250 AI-focused projects running across the ABB Group.

STRATEGIC PRIORITIES



Increase the digital content in our offering to support gross margin and industry leadership in technology.

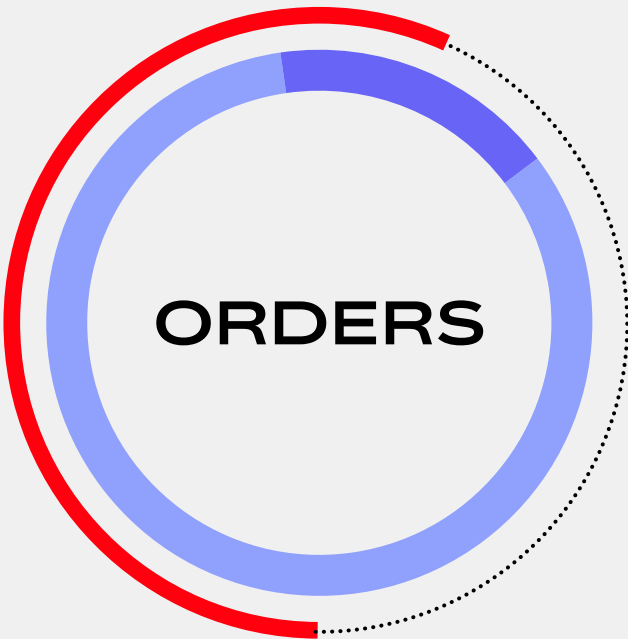


Embedded software enables differentiation.



Continue to develop Industrial Software and Digital services organically and make bolt-on acquisitions.

Our priorities
Technology



- ~60%¹** orders are software or digitally enabled products and services
- 83%** orders are products and solutions
- 17%** orders are services

PEOPLE STRATEGY

Our priorities
People



EMPOWER

Our high performance, high integrity culture is grounded in **empowerment and engagement**.

GROW

We innovate in a changing world to solve the challenges of today and tomorrow, taking responsibility **to learn, connect and grow**.

IMPACT

We impact a more sustainable, equitable and inclusive workplace and society.

ACTIVELY MANAGING THE PORTFOLIO

Our priorities
Portfolio management



Focusing on small to mid-size bolt on acquisitions: Strategic criteria

Fit with ABB's Purpose

- Electrification & automation
- Sustainability & resource-efficiency
- Technology leadership

Business attractiveness

- Market growth and market profitability
- Contribute to ABB's ability to hold a leading market position
- Financial performance

1–2%

Acquired average growth¹
through economic cycle

STRATEGIC MANDATES FOR OUR DIVISIONS

→ Growth

→ Profitability

Stability

OUR SUSTAINABILITY AGENDA

Our priorities
Sustainability



Focus on low-carbon society, preserving resources and social progress

We enable a low-carbon society

We are committed to reaching net zero by 2050 and to partnering with our customers to avoid emissions.

We preserve resources

We embed circularity in our projects, reduce waste, protect water and biodiversity, and use land responsibly.

We promote social progress

We take care of our people and promote social progress with our partners, suppliers and communities.



THE CANADIAN ORGANIZATION



Vince Pesce
Country Holding Officer



Katie Bessette
Country HR Manager



Stéphanie Lefebvre
Canada Corporate Counsel
and Fiduciary, Senior Counsel
for Electrification



Carley Tietolman
Country Communications
Leader



Anne-Marie Born
Country & Electrification HSE
Business Director



Anne Bouchard
Country Tax Manager



Mike Golden
Country Security Manager



Evan Balaila
Country IS Manager



Marc-André Labelle
Country Real Estate Manager



Samantha Lebreux
Country Trade Compliance
Officer

IMPORTANT NOTICES

This presentation includes forward-looking information and statements including statements concerning the outlook for our businesses.

These statements are based on current expectations, estimates and projections about the factors that may affect our future performance, including global economic conditions, and the economic conditions of the regions and industries that are major markets for ABB Ltd.

These expectations, estimates and projections are generally identifiable by statements containing words such as “expects,” “believes,” “estimates,” “targets,” “guidance”, “plans,” “outlook,” “on track,” “framework” or similar expressions.

There are numerous risks and uncertainties, many of which are beyond our control, that could cause our actual results to differ materially from the forward-looking information and statements made in this presentation and which could affect our ability to achieve any or all of our stated targets. **The important factors that could cause such differences include, among others:**

- business risks associated with the volatile global economic environment and political conditions
- costs associated with compliance activities
- market acceptance of new products and services
- changes in governmental regulations and currency exchange rates.

Although ABB Ltd believes that its expectations reflected in any such forward-looking statement are based upon reasonable assumptions, **it can give no assurance that those expectations will be achieved.**

This presentation contains alternative performance measures. Definitions of these measures and reconciliations between these measures and their US GAAP counterparts can be found in the “Supplemental Reconciliations and Definitions” section of the “Financia Information” booklet found under “Q4 2024” on our website at global.abb/group/en/investors/quarterly-results.

ABB