



ANNUAL GENERAL MEETING, MAY 4, 2023, BENGALURU

2022: A year of record performance

Sanjeev Sharma

Country Managing Director, ABB India Limited

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 India Ltd. These expectations, estimates and projections are generally identifiable by statements containing words such as “expects,” “believes,” “estimates,” “targets,” “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, and
- such other factors as may be discussed from time to time in ABB India Ltd’s filings with the Securities and Exchange Board of India (SEBI), including its Annual Report
- Impact of ongoing pandemic

Although ABB India 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.

Further, Information shared here in inter-alia contains some key financials pertaining to ABB India. ABB India being a listed entity is obliged by law not to share the said information to anyone (other than those who are involved in the process and who are bound by Insider Trading Regulation) unless and until the financials are considered and approved by ABB India Board and there after announced to stock exchanges as per the listing obligations entrusted upon ABB India. Therefore, those privy to this presentation should kindly ensure strict confidentiality of the information shared and discussed here in.

ABB in India: Today

100+ years of presence; 70+ years of manufacturing, Global R&D and Business Services



5 Manufacturing Locations **25** Plants



21 Sales Offices **750+** Partners



8,700+ Colleagues



Faridabad Campus



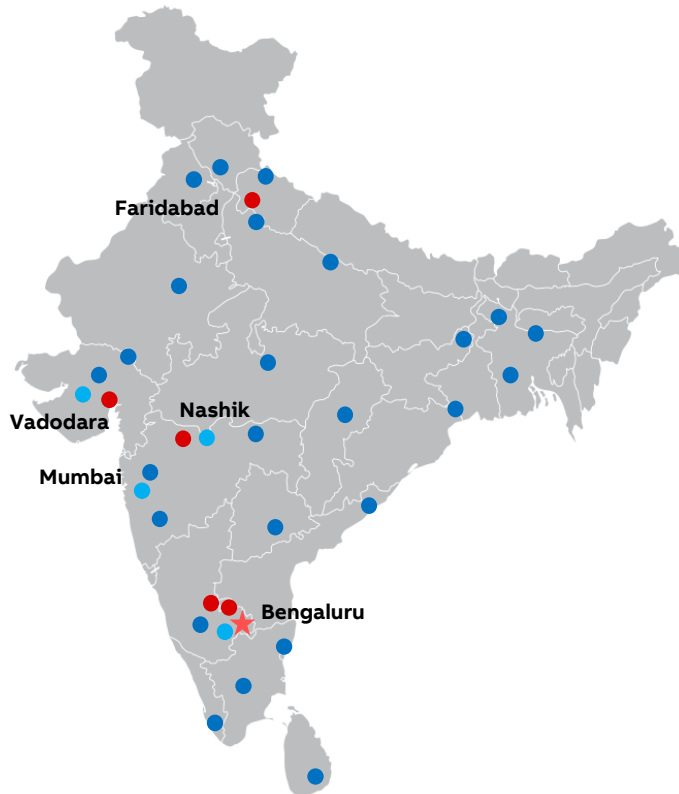
Maneja Campus



Nashik Campus



Innovation Center,
Hyderabad



Bengaluru



HO & Peenya Campus



Nelamangala Campus



ABB Services Bangalore
Hub, Hebbal



Innovation Center,
Whitefield

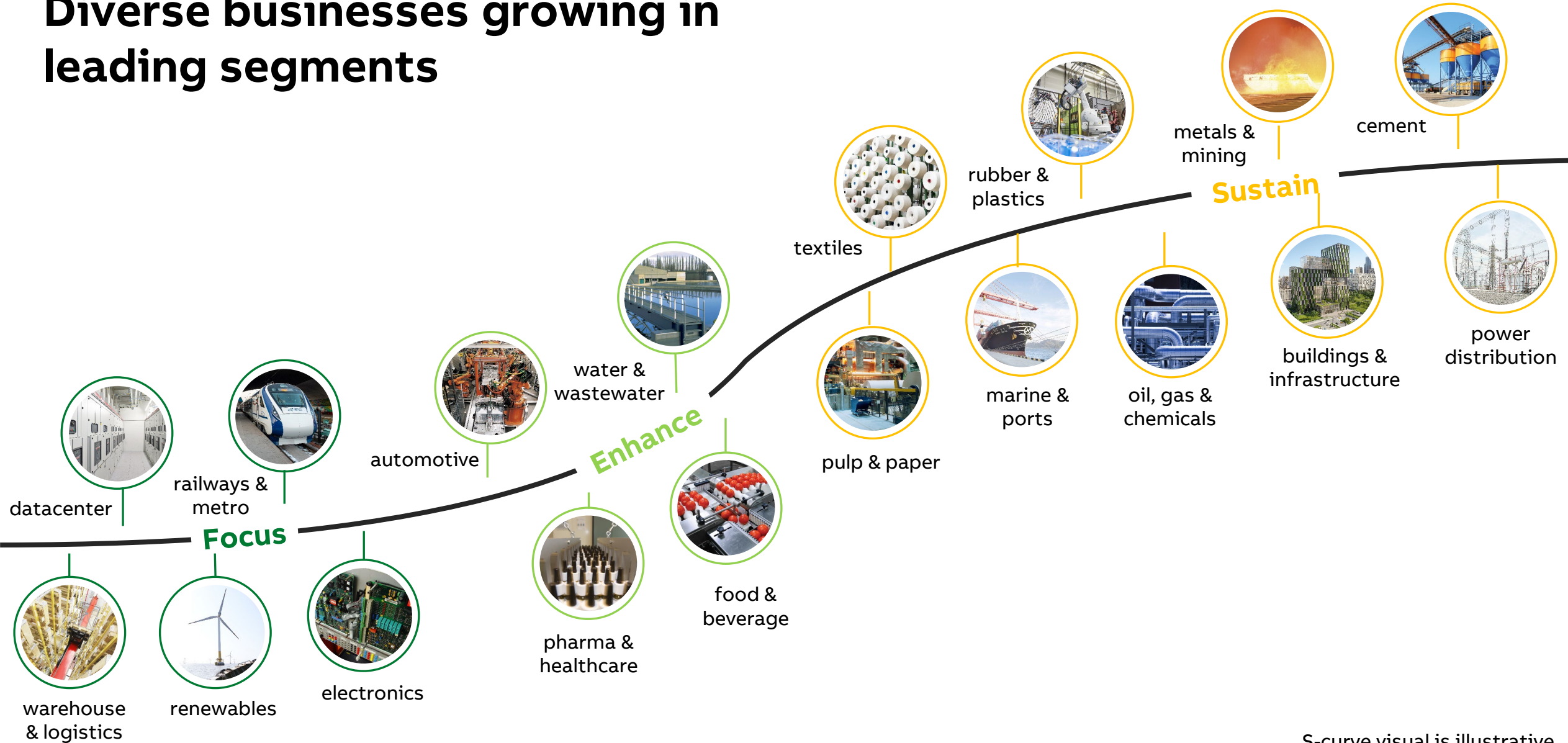
★ Head office, Bengaluru

● Sales and branch offices

● Manufacturing locations

● R&D center

Diverse businesses growing in leading segments



S-curve visual is illustrative

Creating value aligned with ABB Purpose

**Embedding
sustainability**



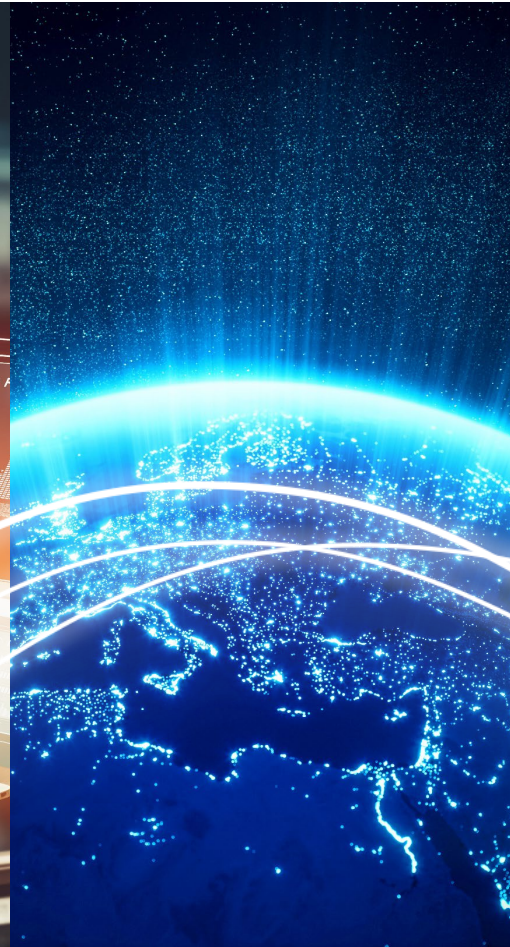
**Creating
success**



**Leading with
technology**



**Addressing world's
energy challenges**



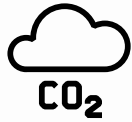
**Transforming
industries**



Embedding Sustainability

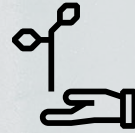


Sustainability in practice



We enable a **low-carbon society**

- Green Infrastructure
- Renewable energy
- Energy efficiency Improvement
- GHG emission reduction



We preserve **resources**

- Material conservation & circularity
- Product stewardship
- Water conservation
- Innovation & biodiversity



We promote **social progress**

- Safe & Healthy workplaces
- Comprehensive D&I¹ framework
- Stakeholder engagement

Integrity and transparency across our value chain



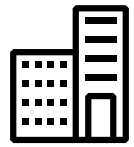
Phase 1



Phase 2

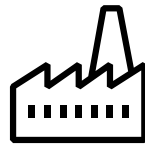


Phase 3



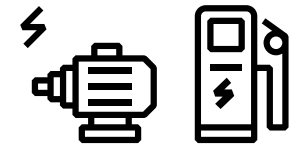
Green Infrastructure

- Site Efficiency
- Innovation in Design
- Water Conservation
- Indoor Environment and Health
- Energy Conservation
- Material Conservation



Green manufacturing

- 100% Renewable Electricity
- 100% Energy Productivity
- 100% Electrical Vehicle
- GHG Emission Reduction
- Water Positivity/Neutrality
- Zero waste to landfill



Green products

- Product Responsibility
- Life Cycle Assessment
- Product Declaration
- Extended Product Responsibility
- Circularity across offerings

Sustainability in Practice: Journey so far



IGBC Recognition

- 'Pioneer in large scale adoption of **Green Factory Buildings** in India'
- **All 5** manufacturing locations certified green factories



Strong ESG performer

CRISIL rated us "**Strong**" in the ESG risk assessment



CO₂ neutral operations

- Realized **RE100** across all 5 manufacturing locations
- **~82%** reduction in own GHG emissions



Preserving resources

- Certified single-use **plastic free** campuses
- **ZERO** liquid discharge factories

RE – Renewable Electricity





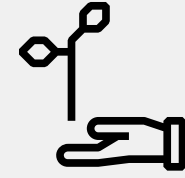
Education

- Learning improvement program for **>10k** students from **98 govt. schools**
- Education & IT skilling for youth



Diversity & Inclusion

- Holistic skilling & scholarship for women to pursue higher education in STEM
- Nurturing **200 children** with special needs



Communities & Environment

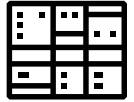
- **>10 Mn** users impacted annually through public infrastructure upgrade
- Water shed management for drought prone villages helping **20,000** villagers



Creating Success



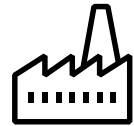
Partnering nation-building projects



~28% of hyperscale data centers pan India use ABB solutions



12 TWh of energy saved by ABB's motors and drives in a decade



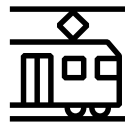
>90% of cement companies use ABB systems



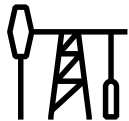
>65% of cars made in India painted by ABB Robots



>80% of metros deploy ABB technology



>750 Indian Railways electric locomotives use ABB traction converters



60% of oil and gas produced in India monitored by ABB systems



>50% pharma companies use ABB drives



~30% installed wind and solar projects use ABB solutions



26 states use ABB's power distribution technology



ABB today: Four leading business areas with 20¹ divisions

**BUSINESS
AREA**



Electrification



Motion



Process Automation



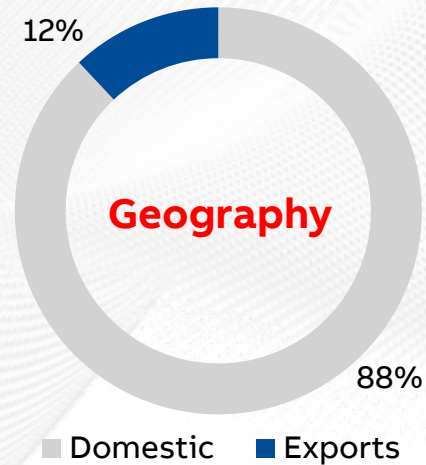
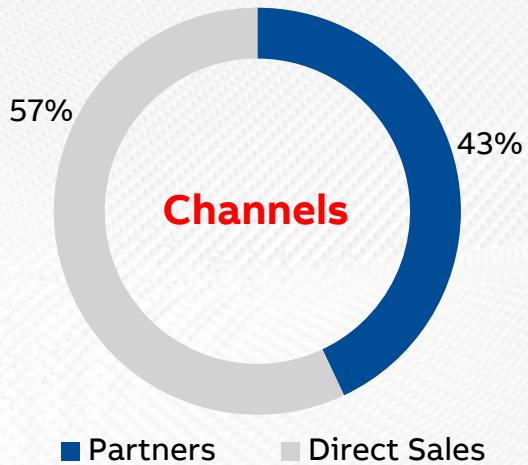
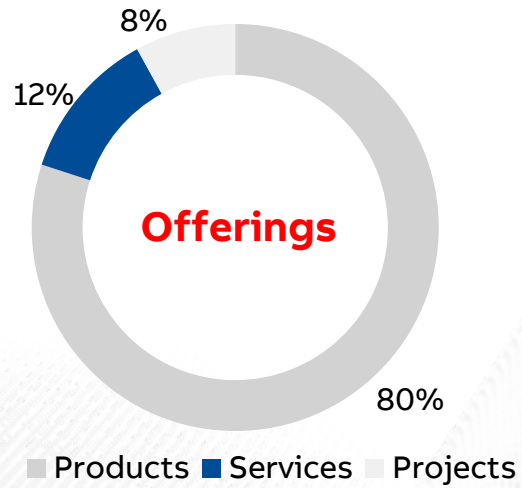
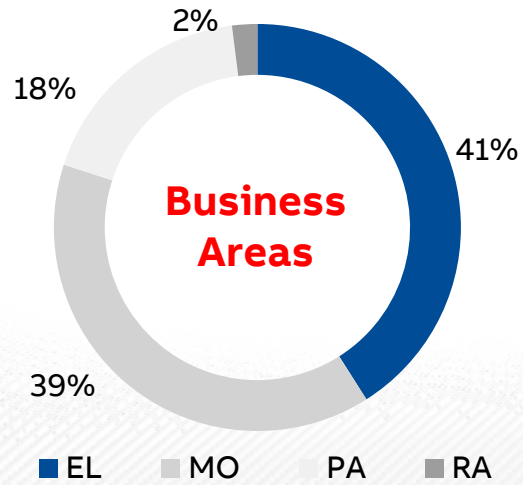
**Robotics &
Discrete Automation**

DIVISION

	Distribution Solutions	IEC LV Motors	Energy Industries	Robotics
	Smart Power	Large Motors & Generators	Process Industries	Machine Automation ¹
	Smart Buildings	NEMA Motors	Marine & Ports	
	Installation Products	Drive Products	Measurement & Analytics	
	Power conversion	System Drives		
	Service	Service		
	E-mobility	Traction		

1 – Machine Automation division is not part of ABB India & is run separately out of ABB B&R

Strong business model



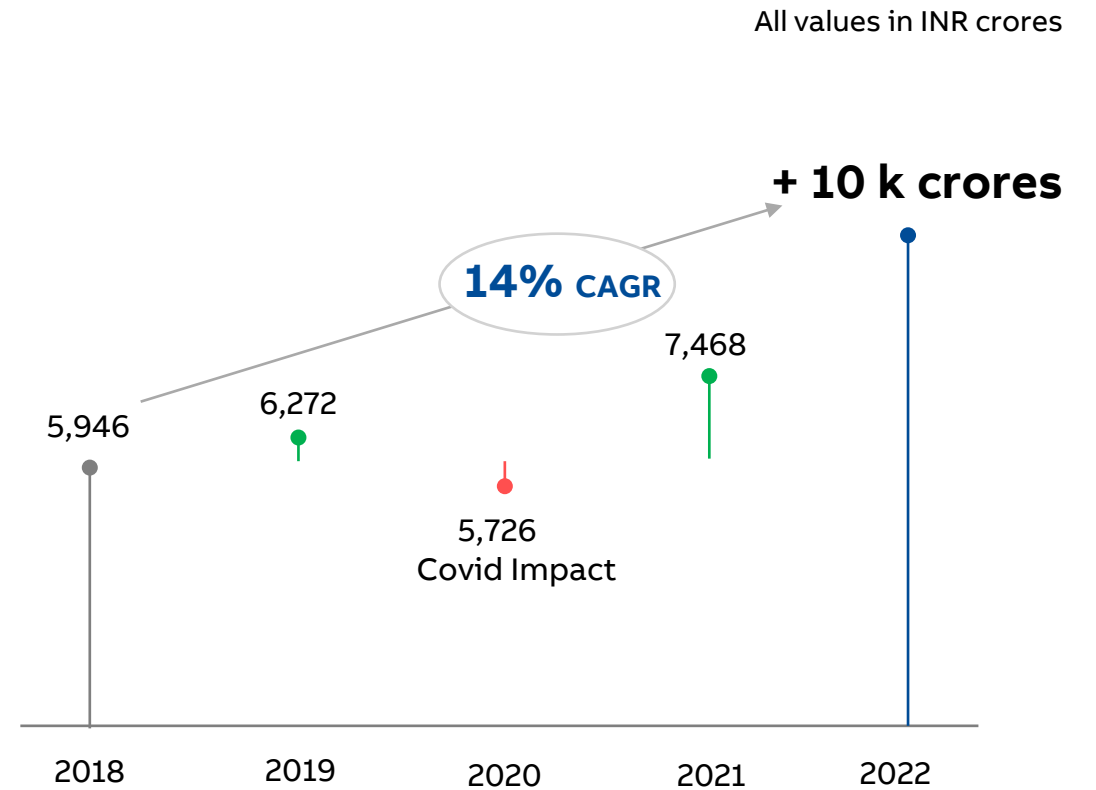
Based on 2022 revenues

EL –Electrification; MO – Motion; PA – Process Automation; RA: Robotics & Discrete Automation





Record orders in 2022



** Comparable data post removing divested Businesses (Power Grids, Solar, Mechanical Power Transmission, Turbocharging)

Performance in 2022

Revenue (INR crores)

8,568 (+24%)

Profit after tax (% to revenue)

11.9% (+440bps)

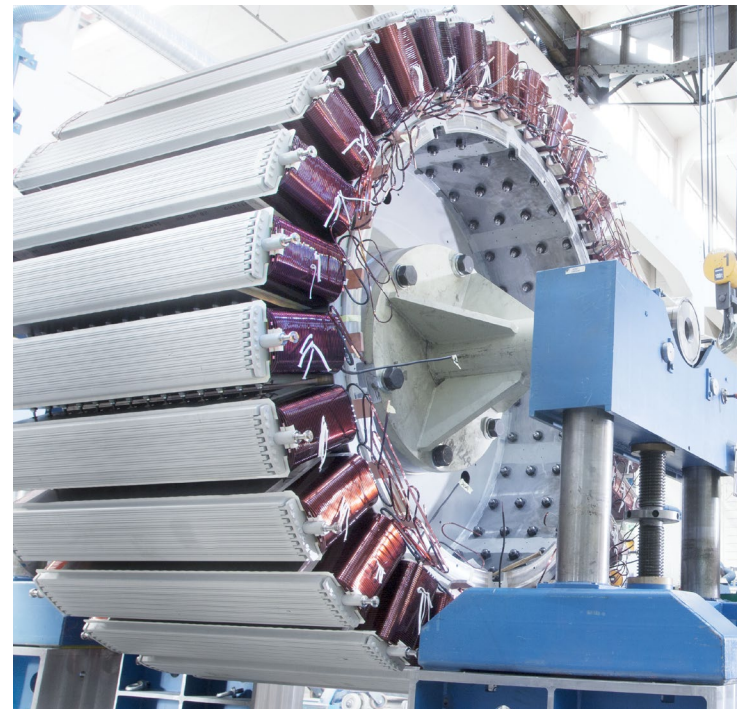
Dividend (INR per share)

5.5 (+6%)

Earnings per Share (INR)

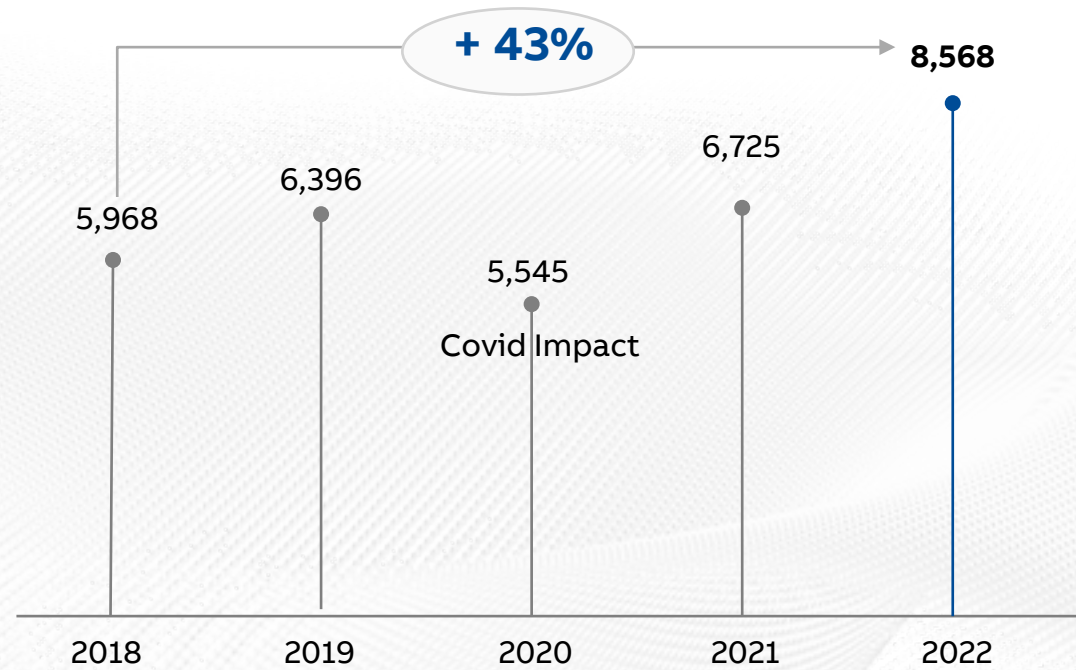
48 (+92%)

* Figures in bracket is in comparison with 2021

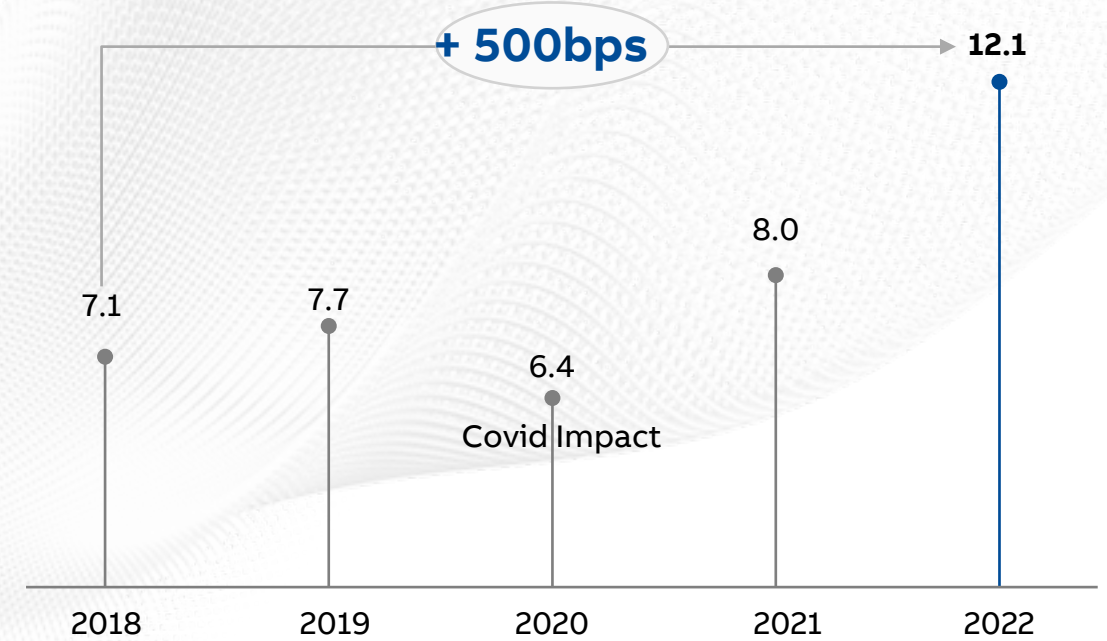


Quality revenue driving profitable growth

Revenue (INR crores)



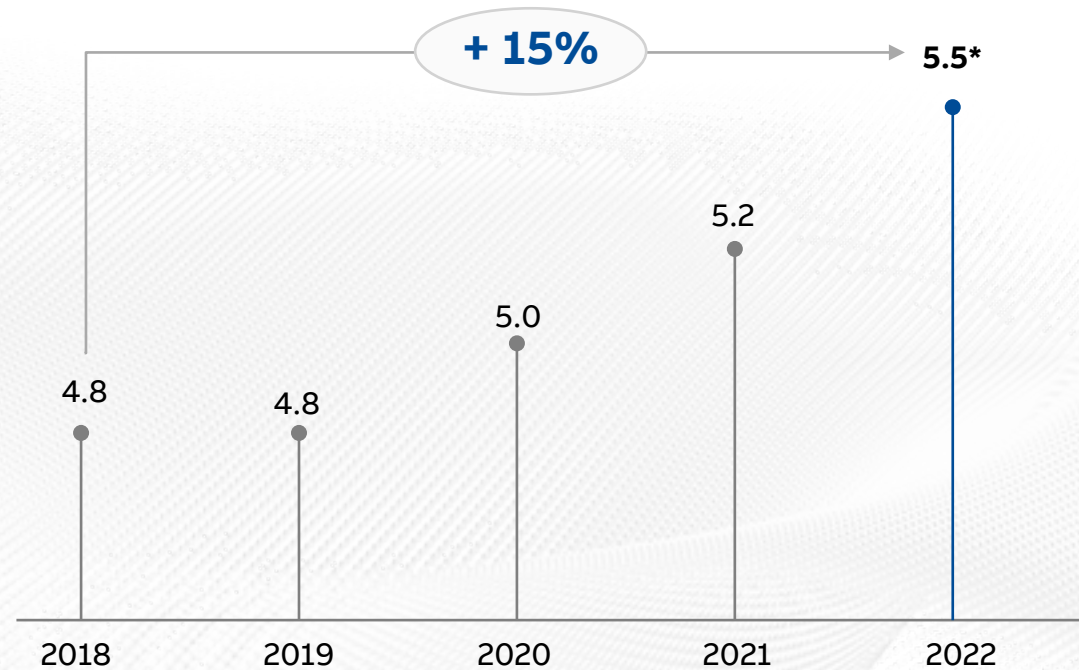
PBIT (% to revenue)



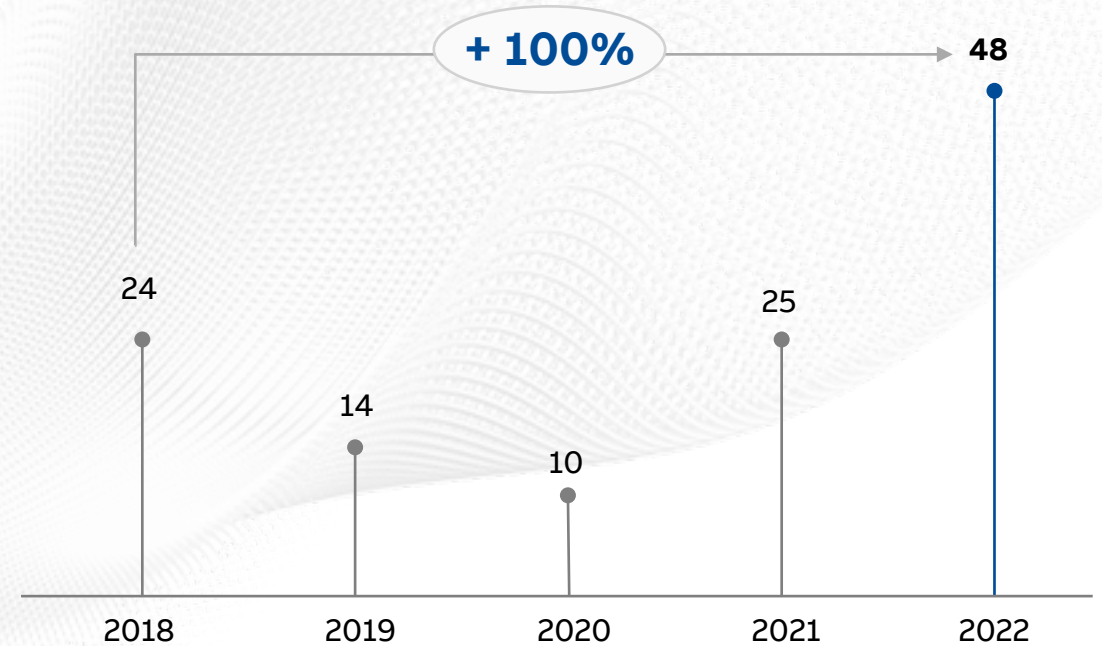
** Comparable data post removing divested Businesses (Power Grids, Solar, Mechanical Power Transmission, Turbocharging)

Delivering superior shareholder value consistently

Dividend (INR per share)



Earnings per Share (INR)

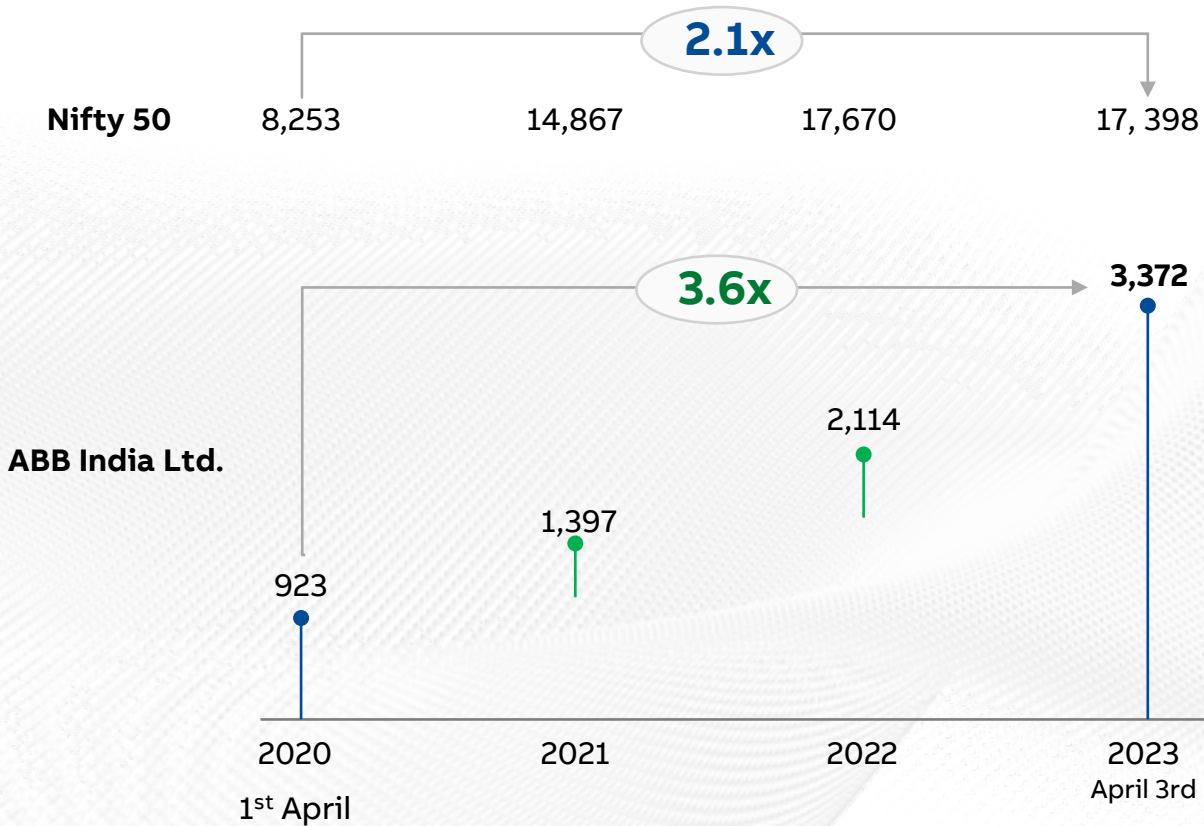


* Proposed dividend

** Earnings per Share post absorbing the reduction in earnings from divested Businesses (Power Grids, Solar, Mechanical Power Transmission, Turbocharging)

Delivering superior shareholder value consistently

Stock Price (INR per share) relative to Nifty 50



1 – ABB Stock Close Prices in BSE on start of the Financial Year (1st April or 1st day of market opening). Value creation post listing of Hitachi Shares for Power Grid Divestment

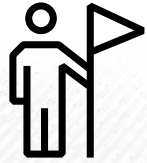


Published the first integrated ABB India Annual Report

Comprehensively covering



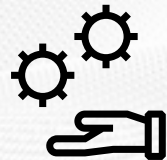
Non-financial details



Our purpose



Sustainability

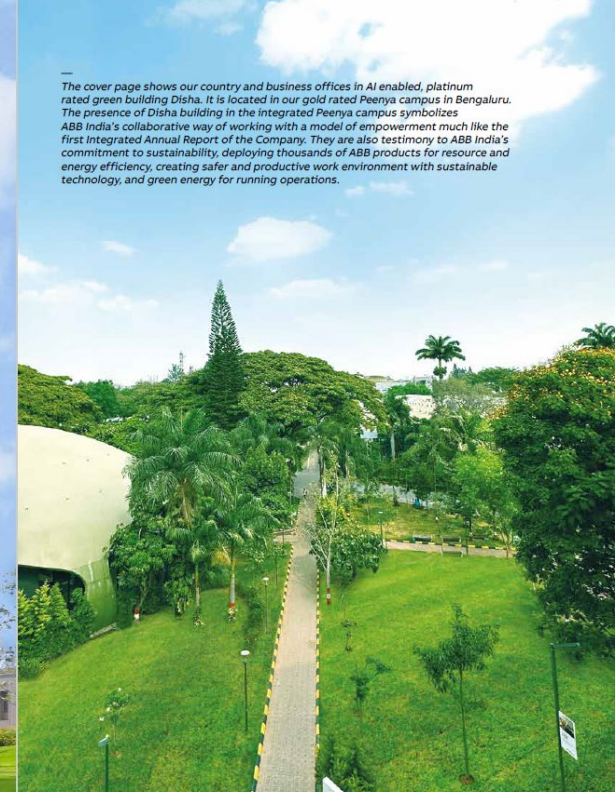


Overall strategy



Integrated Report 2022

The cover page shows our country and business offices in AI enabled, platinum rated green building Disha. It is located in our gold rated Peenya campus in Bengaluru. The presence of Disha building in the integrated Peenya campus symbolizes ABB India's collaborative way of working with a model of empowerment much like the first Integrated Annual Report of the Company. They are also testimony to ABB India's commitment to sustainability, deploying thousands of ABB products for resource and energy efficiency, creating safer and productive work environment with sustainable technology, and green energy for running operations.



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Leading with Technology



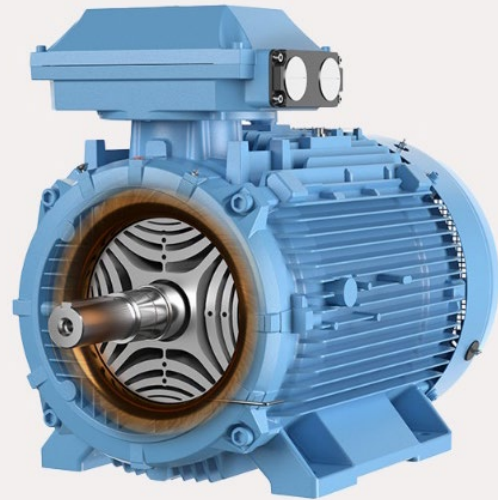
Consistently introducing new technologies for local markets

Eco-efficient switchgear
PrimeGear



99.99% lower global warming potential

IE5 SynRM
motors



40% lower energy losses compared to IE3 motors

Digital Ammeters and
Voltmeters



Smart metering and energy monitoring

Flameproof
low voltage motors



Safe choice for potentially explosive atmospheres

Addressing world's energy challenges



Accelerating resource efficiencies

Uninterrupted power supply
for hyperscale data centers



Maximizing uptime for a major
chemical manufacturer

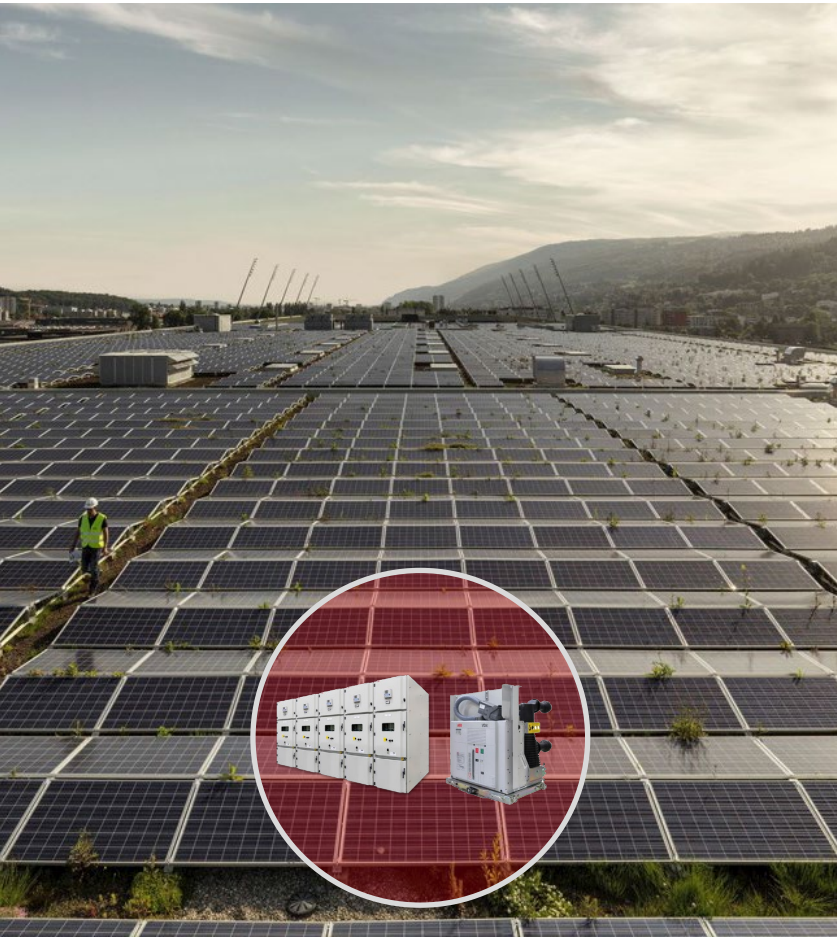


Reliable operations for cleaner Ganga
project

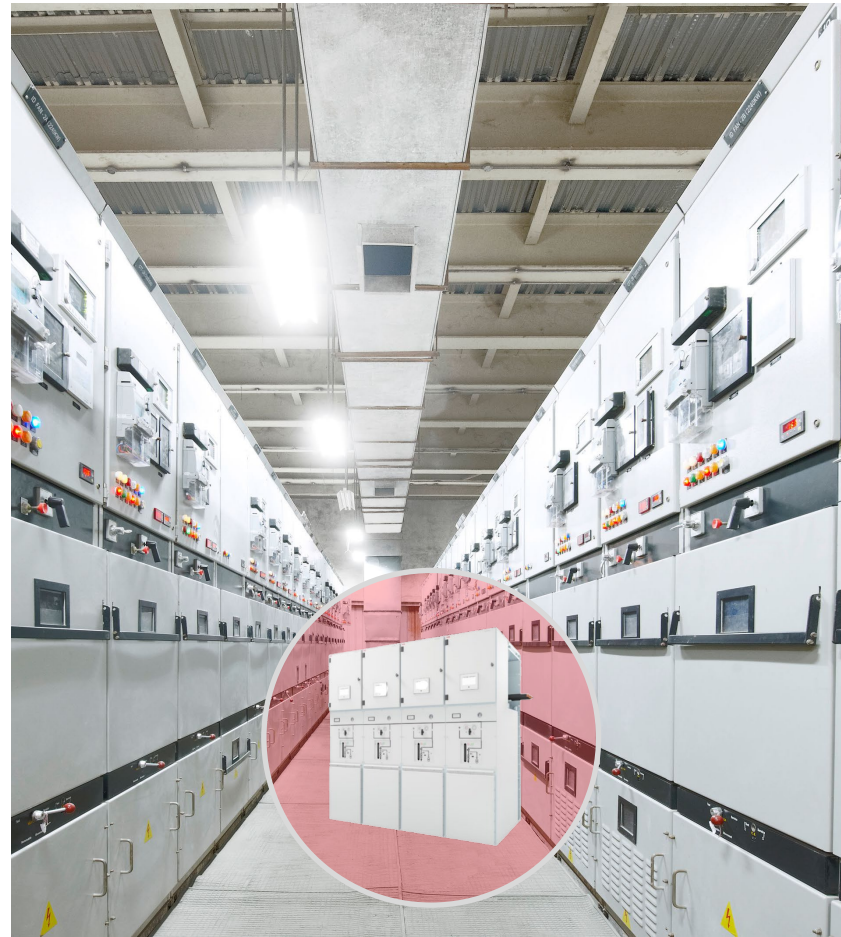


Steering a greener economy

Improving power quality for a 300 MW solar plant



Sustainable control and protection for >1GW solar projects



Maximizing uptime and safety for effective City Gas distribution



Transforming Industries



Transforming transportation systems

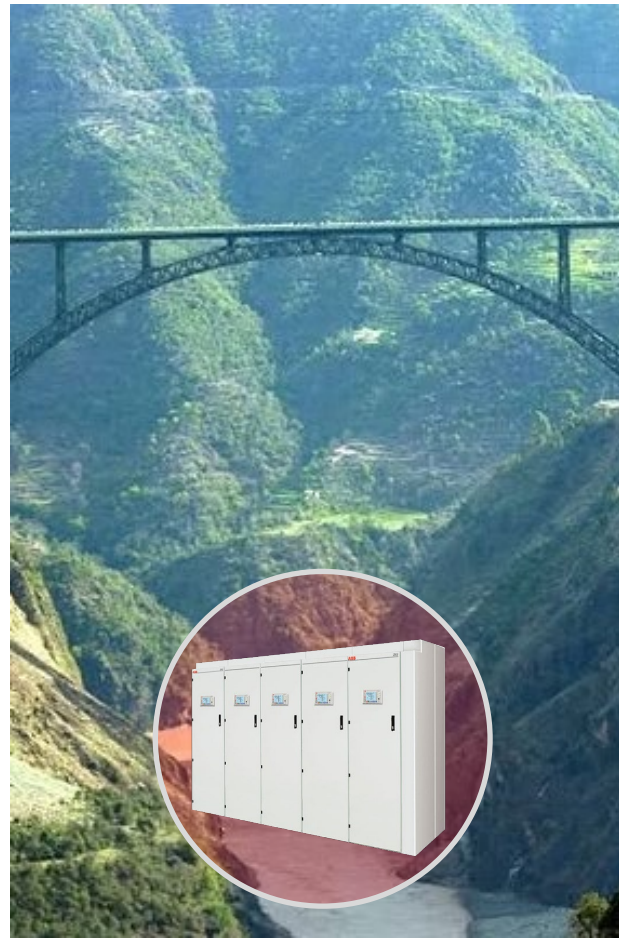
Robust traction technology
for semi high- speed trains



Uninterrupted power supply
for Airports



Reliable energy distribution
for world's highest rail bridge



Enhancing productivity with
fully automated car paint line



Automating and digitalizing industries

Improving energy efficiency for steel major



Advanced process control for production at Andhra Paper



Productivity enhancement for FMCG major



Reducing the total cost of ownership for pharma major



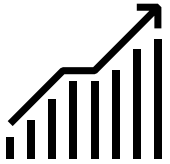
Strategic Direction



Strategic Focus



Embedding sustainability
in everything we do



High growth, profitable markets
aligned with mega trends



Organic and inorganic
investments



Spotlight on brand ABB India

ABB India says customer enquiries have increased, hopeful of private sector capex revival

The company has followed the global strategy of its parent, the Swedish-Swiss engineering multinational ABB, to move away from projects business to products. This has augured well for cash flows and revenue despite COVID-related disruptions, says Sanjeev Sharma, country head and MD, ABB India Ltd.

RACHITA PRASAD
FEBRUARY 21, 2022 / 12:34 PM IST

moneycontrol



Kiran Dutt, ABB India appointed as the Vice Chairman of IEEMA's LV Switchgear Division

Dutt's appointment comes ahead of his rich and vast experience spanning over 26 years in this industry.

by Staff Writer | April 5, 2022
Manufacturing Today



Kiran Dutt, President - Electrification at ABB India Ltd.

With this additional responsibility at IEEMA, Kiran will be providing his leadership, share knowledge and expertise for benefiting the overall fraternity of the Electrical and allied industry, further strengthening the foundation, and functioning of LV switchgear industry through IEEMA.

Companies

India to become the most important R&D centre globally: ABB India

Swaraj Baggonkar | Updated On: Mar 02, 2022

THE HINDU
BusinessLine



ABB

has interests in motion, electrification, process automation and robotics

ET CFO.com
From The Economic Times



TK Sridhar
CFO, ABB India

Companies

ABB Survey: India ranks third with companies looking to be net-zero in five years

Rutam Vora | Updated On: May 31, 2022

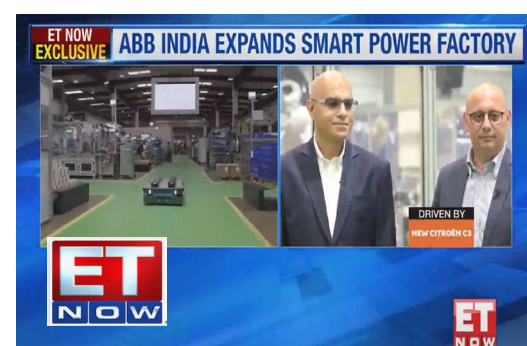
BusinessLine



Sanjeev Arora, President, Motion Business Area, ABB India Ltd.

Over 70 per cent of respondents in India are investing in and upgrading equipment to meet energy efficiency. The cost of adoption remains a major barrier.

The manufacturing industry in India is indicating a noticeable shift in the mindset towards cost-saving and energy efficiency measures, with a large number of companies planning



Q3 Review: ABB India's Earnings Operationally Inline With Expectations | BQPrime



India expected to grow at fastest CAGR for digital panel meters: ABB

Digitalization is changing the way energy is managed, from the integration of renewables into smart grids, up to the integration of the entire electrical system into a single platform. This is driving the demand for digital panel meters, which require high accuracy and reliability.

ABB DATAQUEST

The M1M11, M1M DS, M1M 208, and M1M 308 cover the main submetering easily and cost-effectively by powering quality monitoring requirements inside power factor correction boards, motor control centers or sub-distribution switchboards of commercial and industrial buildings.

The emerging panel meter market, and our introduction of new range of meters offers a huge potential for customers to better manage energy performance across industries. Thanks to their connectivity capabilities, M1M can now leverage on the integration in ABB's Ability Energy and Asset Manager cloud-computing platform to monitor, optimize, and control the complete electrical system.



Himanshu Tangri, CQO Bureau, DATAQUEST

THE FUTURE OF FLEXIBLE MANUFACTURING - COBOTS

In a dynamically changing world, the role of collaborative robots (cobots) is instrumental in accelerating the adoption of Industry 4.0 by transforming manufacturing systems into making production lines more efficient. Since to know how cobots can help industries in the journey of turning accelerating towards automation.



Indian Mining Sector's Transformative Journey Towards A Sustainable Future

Industry partners are bringing best-in-class technologies and deep domain knowledge to help mining companies - right from upstream to downstream - to plan, produce and service energy-efficient operations. This is driving the demand for digital panel meters, which require high accuracy and reliability.



Helping industries enhance performance and boost energy efficiency

Power equipment maker, ABB India on Friday inaugurated its new production facility at Vadodra to manufacture digital technologies for electrical distribution products.



ET HRWorld

From The Economic Times

Paternity leave: Time for companies to give their employees the joy of fatherhood?

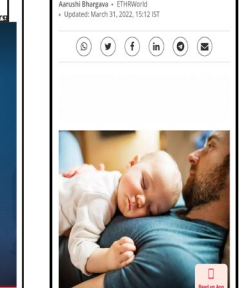


ABB India recognized as the 'MNC in India of the year' by AIMA*



* All India Management Association

Let's write the future.
Together.

