

Advancing Energy Tech

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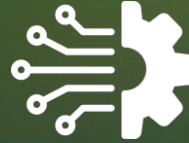
April 15, 2026

Three megatrends are transforming our world

New Energy Landscape



Digital & AI



Multi-Polar World



Customer & Supply Chain Impact

Sustainability

Fourth Industrial revolution acceleration

Anti-fragile, resilient, short, competitive

Climate crisis

Electronics and software step up

Customer intimacy and personalization

Resource frugality

People central to success – hire, engage, retain, develop

WE ARE YOUR ENERGY TECHNOLOGY PARTNER

We **electrify**, **automate** and **digitalize**
every industry, business and home,
driving **efficiency** and **sustainability** for all.

Record annual revenues driven by strong organic growth,
Both businesses stronger in H2

**FY 2025
Group revenues**

€40bn

FY'25 revenues

+9%

FY'25 org. growth

Energy Management

H1 → H2

+10.1%
org. growth

+10.5%
org. growth



FY

+10.3%
org. growth

Industrial Automation

H1 → H2

-1.0%
org. growth

+7.1%
org. growth



FY

+3.0%
org. growth

We've been recognized for our innovation and impact

Award-winning Innovation and Technology

FAST COMPANY

Most Innovative Companies

FORTUNE

Europe's Most Innovative Companies



IF Design Award
recognition for 63 products



reddot award

Outstanding Product Design & Design-lead Innovation Winner



Most Innovative Company

Results-oriented Sustainability leadership

TIME

Ranked #1 World's Most Sustainable Companies 2024 and 2025



Ranked #1 Most Sustainable Companies 2021 and 2025



AirSeT Switchgear
Sustainable Product Design Champion



Ranked #1 of Top 250 Sustainable Companies

Consistently ranked as one of the world's leading companies

FORTUNE

World's Most Admired Companies

ETHISPHERE

World's Most Ethical Companies



World's Most Influential Companies



Circularity Lighthouse
5x Sustainability Lighthouses
4x End-to-End Lighthouse
3x Advanced Lighthouses
1x Talent Lighthouse
DE&I Lighthouse



Top 100 Best Global Brands



'Best Places to Work' and 'Best Workplace in Manufacturing & Production'



Advancing Energy Tech to the Next Level

Energy & Industrial
Intelligence



TECHNOLOGY
Leadership

Regionalization



CUSTOMER
Differentiation

Cost competitiveness
& Scalability



OPERATIONAL
Excellence

We continually transform our supply chain



People

growth mindset
digital early adopters
core expertise



Customers

industry-leading quality
specialized by customer segment
reliable supply chain

IMPACT

Supply Chain



Planet

responsibility: ethical and safe
decarbonization: net-zero ready
resource efficiency & circularity



Performance

regional & effective operations
smart & unified processes
productivity & collaborative design



Customer
Intimacy &
Value



Built to
Adapt



Innovation at
Scale



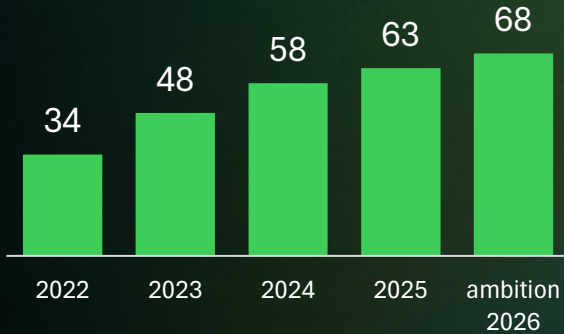
People &
Planet

Customer Intimacy and Value

Listening, Learning, Delivering: The Voice of the Customer in Action

A smart supply chain built on customer voice

NSS on Delivery



Specialized Supply Chain strategy for OEM, Panel Builders, EcoXperts and Distributors looking to personalize our customer experience

Competitive lead time in place to deep dive into potential opportunities vs competitors

Strong focus on **reliability**, with push on **backorder reduction** as main driver to improve customer satisfaction

Process Robustness and credibility

+1,000

Customers interactions
driven by
Customer Connect Program

-40%

Lead time reduction in 2025
supported by
**competitive lead time
benchmark**

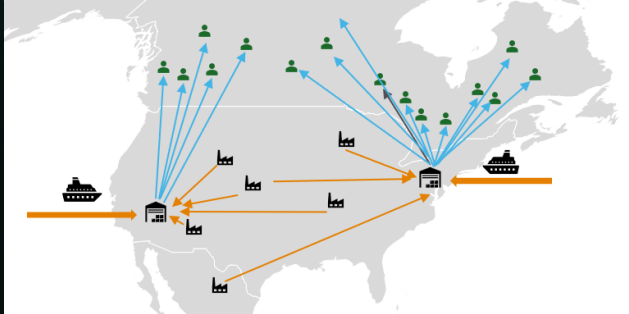
-75%

Backorder reduction during
the last 2 year by
aligning E2E flow

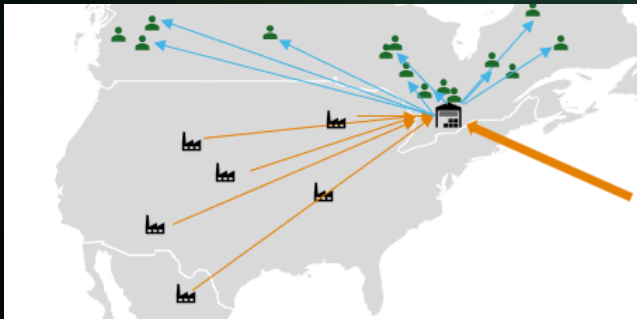
Example: regionalizing for impact

Faster lead times, higher availability, lower tariff exposure for Canadian customers

Before Canada customers delivered from US DCs



Now Shorter Flows from Dedicated Canada DC



1-2

Days Leadtime from
5-10 Days

74%

Record high for Canada
NSSoD from -31%

91%

OTDS (Dec '25)
from 72%

Built to Adapt Antifragile supply chain

Simplifying supply chain design for greater agility

Next level of upstream and inter-regional flow simplification, lean campus, and platforming

Complexity Reduction



Direct Flows

Lean Regional Campus

Strategic Partner Sourcing

Unified Digital Architecture

Platformed and Standardized Offer

18% to

8%

Complex flows

52% to

70%

Part commonality

64% to

90%

NPI spend

2,120 to

1,120

apps

End to End Resilience Management System

Resilience and Diversification

End-to-end, laser focused preventive actions with a mix of global and local risk data inputs

Design

Technology standard compliance

Source

Source Resilience Index

Make

Make Resilience Index

Deliver

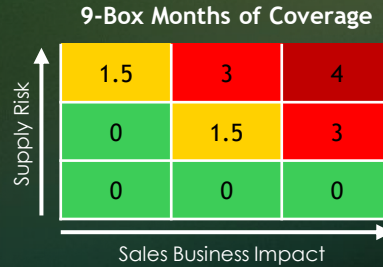
Deliver Resilience Index

Site Risk Prevention

Site Resilience Index

Supply Chain Hub – Resilience at Component Level

Mitigating key crises such as supplier geopolitical export controls, memory chip shortages through Strategic Safety Stock (SSS) at Hub, with 9-Box revamp in 2025

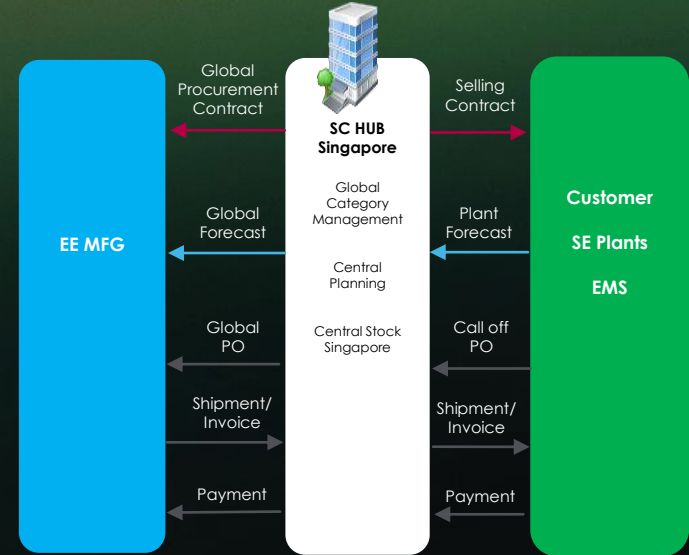


Strategic Safety Stock

=

9 Box Months of Coverage
+
Category Market Adjustment

Singapore Supply Chain Hub



Innovation at Scale

Autonomous supply chain planning

Intelligent, predicative, and self-correcting

Automated

Foundational persona-based process automation

Rule-based execution (if-then, thresholds)

Includes **AI-augmented forecasting** with predefined logic

Touchless core processes (CSF, POs)

Employee is expert, provides judgement and handles exceptions

14%

Safety stock reduction in 2025

Coordinated

End-to-end cross domain arbitration and optimization

Coordinated decisions across domains to reduce conflict

Cross-persona alignment

Explicit trade-offs (Service vs Cost vs Inventory)

Outcome-driven squads

Employee arbitrates and collaborates

5%

Secure Power NAM inventory reduction

Autonomous

Self-learning closed loop, anti-fragile

Adaptive, closed-loop system that learns from outcomes

Anti-fragile (adapts to outliers)

Probabilistic reasoning

Closed-loop learning cycle

Employee sets guiderails, targets, ethics, and strategy - doesn't make daily decisions

30%

Component inventory reduction NAM (pilot)

Autonomous planning priorities

Suppliers (up to T3) ← Suppliers ← Manufacturing ← Distribution ← Customers ← Care

H2 Horizon

Integrated Business Planning (SIOP)

Vendor Forecast

Master Production Plan

Distribution Requirement Plan

Collaborative Sales Forecasting

H1 Horizon

Command Center

Clear to Buy

Clear to Build

Clear to Ship

Clear to Receive

Touchless PO

Auto PR-PO generation
PO expedite
Auto PO rescheduling and cancellation

Touchless MPP

Workorder management automation
Auto clear-to-build

Touchless DRP

AI-powered inventory rebalancing

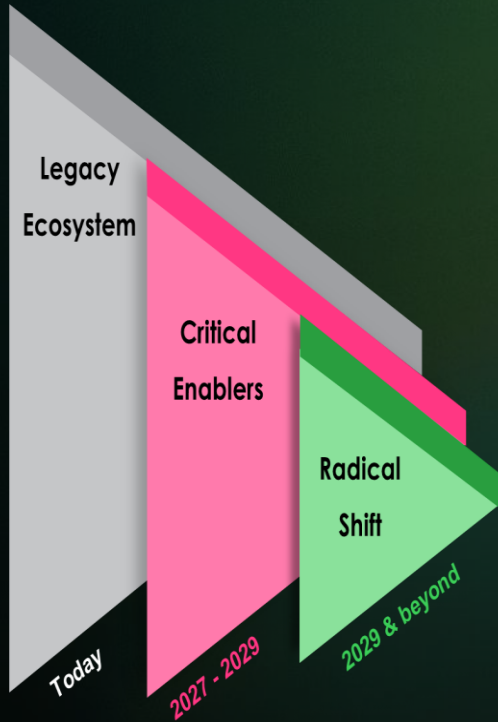
Touchless CSF

AI @ Scale for demand sensing and digital lock for market value add
Customer First: VIP, Cloud & Service Providers

Touchless inventory parameters
safety stock, lead time, MOQ, stocking policy

A radical shift in logistics aligned with our growth ambitions

Logistics Digital backbone uplift



Simplified & Optimized Footprint

Unified systems deployment (Manhattan Active TMS and WMS, SAP Global Trade services)

Strategic Partnerships (Carriers/3PL, Warehouse Automation)

Fast and connected

Real time end-to-end visibility from suppliers to customer door

AI & Analytics @Scale

SE & external data fully integrated to sense, detect, decide and act

Optimized & Sustainable

Sustainable & Profitable growth across our warehouse footprint and our flows

Above competition

Specialized by Customer segments, leveraging best-in-class partners

90%

BE GREEN Digital talent

98%

On-time Confirmed

-15%

Per annum Volume by Air

4%

Per annum productivity

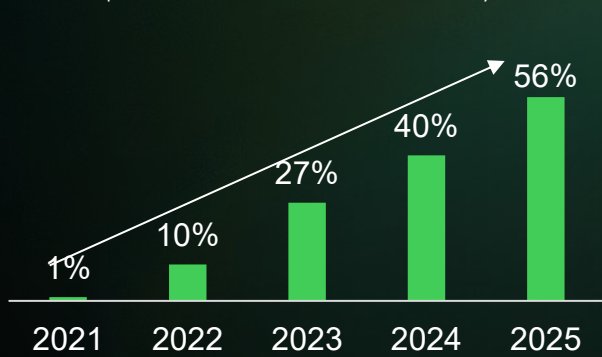
People & Planet: Foundations Enabling the Future

Zero Carbon Project – goal achieved in 2025

Achieve 50% operational emission intensity reduction from top 1,000 suppliers by 2025



YoY operational GHG emission intensity reduction



[Case study 1](#)



[Case study 2](#)

56%
Avg. GHG int. reduction

200 m Tons
Abs. emission reduction

1,004
Active suppliers

3,000+
People trained

250+
Supplier visits

5,000+
Digital consultation

The core value of GSC People Engine

Talent and Productivity Link

Success lies in translating talent development initiatives into tangible business outcomes, creating a measurable value chain from investment to people results.

1 Competency Development

A robust system empowering employees at all levels, aligning skills with strategic business objectives to drive long-term growth.

2 Digital Future-Ready

Integrating AI democratization and change management practices to build an agile, innovative, and future-ready team.

3 Empowerment of All

Empowering frontline employees and leaders alike to unlock the potential of every corner of the organization.

