

# Siemens Energy USA – Company Presentation

December 2025



# U.S. Presence – A Fully Integrated, Full-Service Partner and Driver of the Energy Expansion



Siemens Energy has  
**20 facilities and 14 service centers**  
throughout the United States



Siemens Energy has been  
in the U.S. for more than  
**100 years**



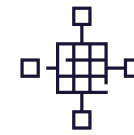
Siemens Energy employs **12,000+**  
people in the U.S. with plans to hire 1,500  
new employees over the next 3 years



**25 m+**  
U.S. homes powered by  
Siemens Gamesa renewables



**25%**  
of total U.S. generation capacity is powered  
by Siemens Energy technologies



**\$10 bn+**  
in transmission equipment installed  
in the U.S. over the last 10 years



**50%**  
of America's nuclear fleet is supported  
by Siemens Energy equipment



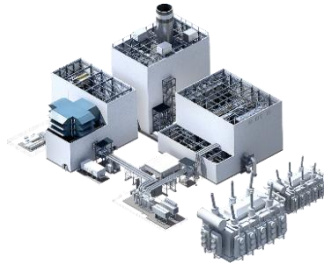
**46,000**  
units of Siemens Energy equipment  
are deployed across the U.S.

# Organizational Structure

**Matt Neal**  
President, North America

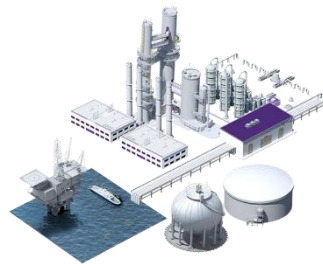


**Scott Luzzi**  
Vice President, Finance



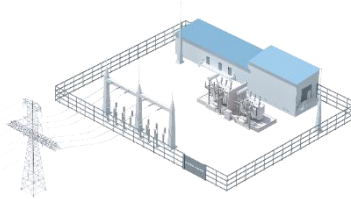
## Gas Services

- Large and industrial gas turbines
- Large steam turbines
- Large generators
- Heat pumps
- Modernization and upgrades



## Transformation of Industry

- Sustainable Energy Systems
- Compression
- Electrification, Automation and Digitalization
- Steam Turbines and Generators



## Grid Technologies

- Decarbonized
- Digitalized
- Resilient

## Siemens Gamesa Renewable Energy

- Onshore Wind Turbines
- Offshore Wind Turbines
- Service Wind

## CEO Functions

- Legal & Compliance
- HR
- IT
- Communications
- Government Affairs



**Customer**



**Competition**



**Geopolitics**



**Financial market**



**Supply chain**

## The world around us is changing heavily

- Electricity demand growth drives company growth
- Customers also face a more difficult business environment
- Momentum to fight climate change is challenged
- Geopolitics and trade conflicts put supply chains under stress
- Investors focus on leading financial performance



However, the key question remains:

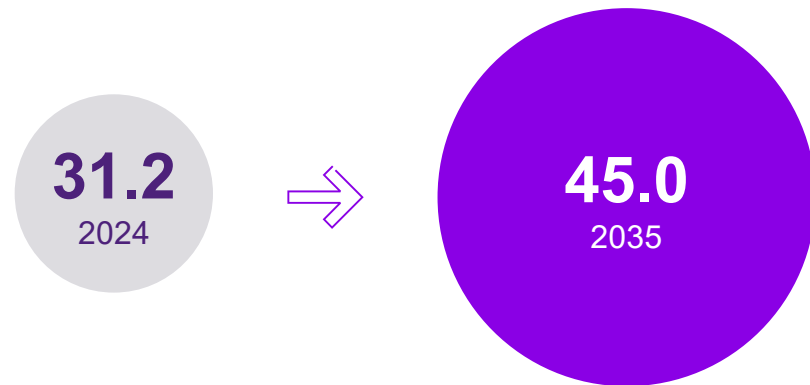
**How can we meet the world's rising energy demand  
while at the same time protecting the climate –  
all in a way that makes economic sense?**

# We operate in a growing market



## Global electricity demand

Forecast electricity demand in 1,000 TWh



~ **2x**

global electricity demand grew twice as fast as total energy demand in 2025

~ **€1.3 tn**

world investment in power generation and grids in 2025

~ **45%**

increase in global electricity demand by 2035

Source: Siemens Energy internal market assessment, IEA "Building the Future Transmission Grid" February 2025, IEA World Energy Outlook 2025, DNV Energy Transition Outlook 2025



In this market environment,

# Siemens Energy is a global leader in energy technology

**~1/6**

of global electricity generation  
is based on our technology

**103,000**

employees work as a team  
to energize society<sup>1</sup>

**>90**

We are present in  
more than 90 countries

**€39.1 bn**

in revenue<sup>2</sup>

<sup>1</sup> Number of employees as of September 30, 2025

<sup>2</sup> Revenue FY 2025

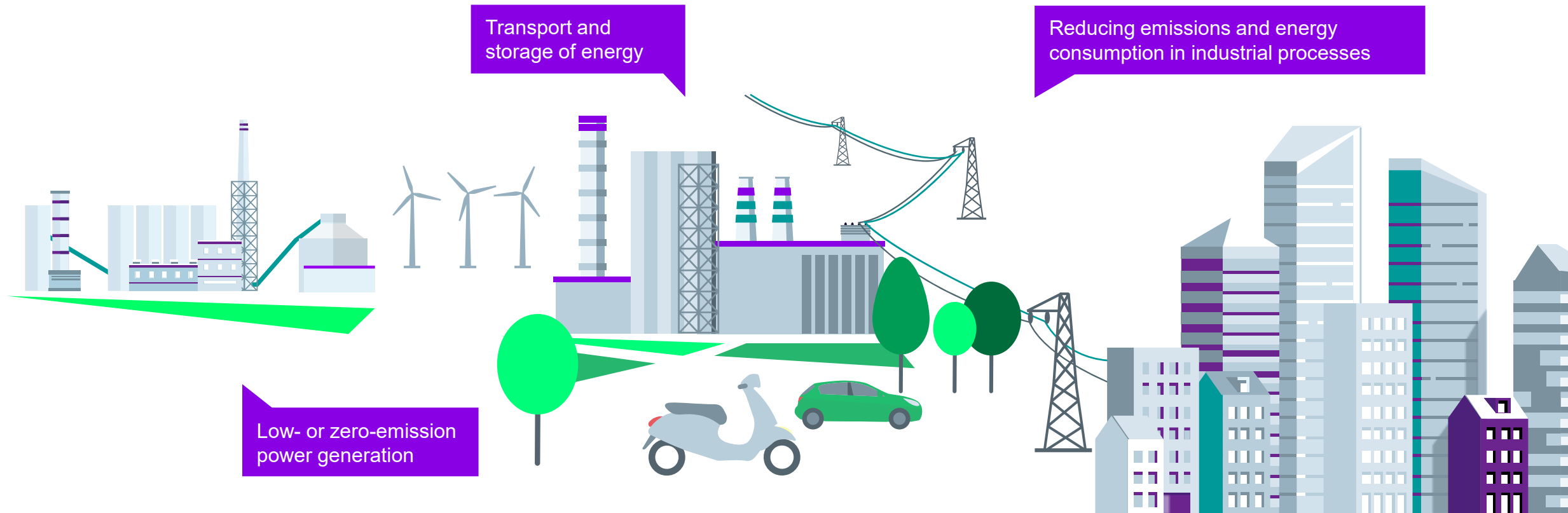


Our purpose and starting point for all our activities is:

**We energize society**

Our strategy has been clear from the start:

# We have positioned the company along the entire energy value chain



# And we have a strong team driving it

Guiding #TeamPurple in times of uncertainty

## Executive Board

Christian Bruch



CEO

Maria Ferraro



CFO

Karim Amin



Gas  
Services

Tim Holt



Grid  
Technologies

Anne-Laure  
de Chamnard



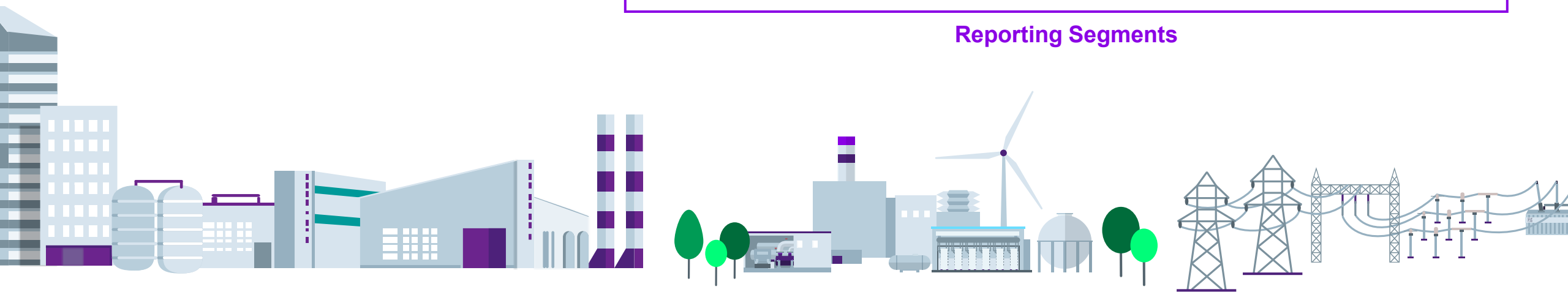
Transformation  
of Industry

Vinod Philip



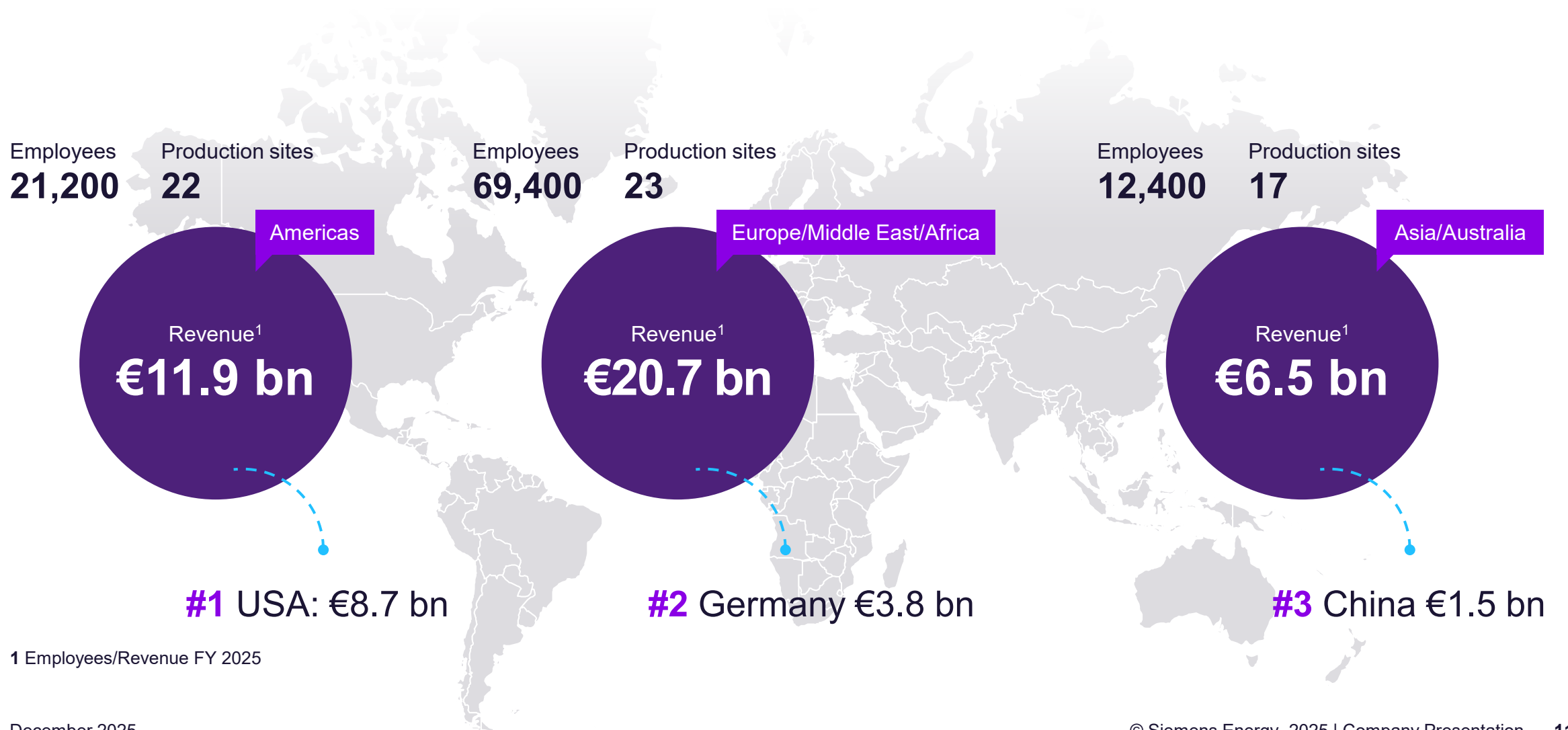
Siemens  
Gamesa

Reporting Segments



# We are a trusted global partner

To serve a broad customer base across regions



<sup>1</sup> Employees/Revenue FY 2025

With a focus on creating sustainable value

# Reflected in our financial performance



Fiscal year 2025  
**Financial resilience – Our financial performance**

⇒ Annual Report 2025

Orders  
**€58.9 bn**

Revenue  
**€39.1 bn**

Order backlog  
**€138 bn**

Basic earnings per share  
**€1.63**

Profit before Special Items  
**€2.36 bn**

Profit margin before Special Items  
**6.0%**

4<sup>th</sup> quarter fiscal year 2025  
**Excellent development, with record revenue**

⇒ Quarterly Results

Orders Q4  
**€14.2 bn**

-2,5%<sup>1</sup>

Revenue Q4  
**€10.4 bn**

+9.7%

Profit margin before Special items Q4  
**4.5%**

Net Income Q4  
**€236 m**

<sup>1</sup> Percentage comparisons in this presentation are always on a comparable basis to the same quarter of the previous year

## Build the transforming energy world

- Develop production infrastructure for fast-growing business
- Evolve business portfolio
- Build the talent pool to deliver

## Enhance resilience in a transforming world

- Build robust supply chains
- Optimize financial resilience
- Respond swiftly to external threats

## Transform the way we operate

- Continuously optimize our operating model
- Leverage data and digitalization
- Keep focus on sustainability



We drive this,

**with our broad portfolio ...**

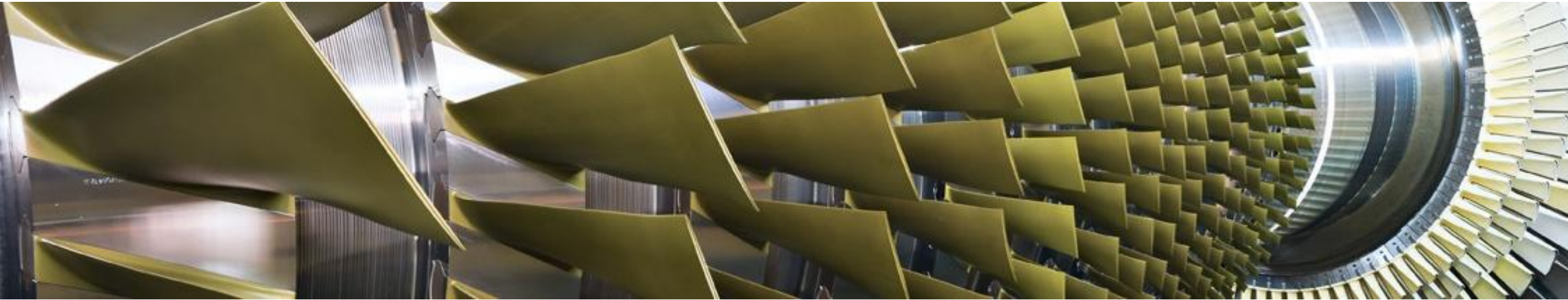


# Transform Power Plants

Gas and nuclear power are part of a future-oriented electricity mix to replace coal and to meet the growing demand for electricity.

# Transform Power Plants

Gas is the reliable backbone of a sustainable energy system



Gas-fired power plants, with their ability to integrate hydrogen and capture carbon, are vital for achieving a resilient energy future.

[⇒ Visit website](#)

## Our offerings

- Low- or zero-emission power generation, based on our comprehensive gas and steam turbine portfolio
- Tailored portfolio to meet the unique requirements of power islands and controls in large nuclear plants or Small Modular Reactors (SMRs)
- Integration of carbon capture plants with existing and new facilities and advancement of CCUS technologies via strategic partnerships

## Market Position

**#2** Gas Turbines

# Ramping up when renewables take a break



## Duke Energy, Charlotte, North Carolina, U.S.

- The gas-fired Lincoln Combustion Turbine Station, built for energy provider Duke Energy, ensures a stable supply of electricity when power from solar generation is not available.
- The installed heavy-duty HL-class gas turbine can reach full capacity within minutes. Innovative simulation was used in its design and material development to account for the extreme stresses caused by quick starts and to ensure durability.
- Its high performance earned two GUINNESS WORLD RECORDSTM titles, for the most powerful simple-cycle gas power plant and for the world's fastest ramp-up rate by a 60 Hz gas turbine power plant.

[⇒ Learn more](#)



This unit is 34% more fuel efficient than other gas turbines on our system. Using less fuel to generate energy helps lower costs for all of our customers.

**Kevin Murray**  
Vice President – Project  
Management & Construction  
Duke Energy



# Strengthen Grids

By 2035<sup>1</sup>, global transmission networks need to double.

<sup>1</sup> Source: Siemens Energy internal market assessment, IEA “Building the Future Transmission Grid” February 2025

# Strengthen Grids

There's no energy transition without a strong and reliant transmission grid



Annual global grid investment is expected to grow by 5% per year, reaching approximately USD 650 billion in 2035.

[⇒ Visit website](#)

## Our offerings

- High-Voltage Direct Current (HVDC) transmission up to 1,100 kV for on- and offshore connections
- Stability and reliability of AC grids (FACTS, Phase shifters and Storage)
- High voltage substations: air insulated (cost efficient) or gas insulated (small footprint)
- Environmentally friendly clean air GIS and AIS from 72.5 kV to 1,100 kV and up to 80 kA
- Full range of transformer types: HVDC, power, distribution, traction, reactors and phase shifters
- Service for power transmission products, systems and solutions
- Next generation digital products and solutions through IoT<sup>1</sup>-connected grid devices

## Market position

**#1** Solutions

**#1** Products

**#2** Service

# Connecting New York's first utility-scale offshore wind farm to the grid



## New York State, United States

- First offshore HVDC grid connection project in the U.S., deploying a technology that will reduce transmission losses over long distance
- Green energy for nearly 600,000 homes in New York State Sunrise Wind will support New York's goal of 100% clean electricity by 2040
- To date, Siemens Energy has connected the offshore grid to the mainland 21 times, providing more than 12 gigawatts of wind power to households in Europe

⇒ Learn more



# Future-proof Industries

A vibrant local industrial base is a major factor for economic resilience.

# Future-proof Industries

Helping energy-intensive sectors become more resilient



Advanced energy systems are required as rising costs push efficiency investments, energy security concerns boost supply diversification, processes switch to electricity and AI-driven power demand intensifies.

⇒ Visit website

## Our offerings

- **Compressors:** Compressing, transporting and storing gases
- **Industrial steam turbines and generators:** Providing process steam and converting heat to electricity
- **Electrification, automation and digitalization solutions:** Electrifying industrial processes and maritime
- **Electrolyzers:** Providing clean hydrogen at scale to industrial processes
- **Service:** Repairs, field service | Modernization and upgrades | Digital services | Replacements
- **Digital:** Asset and plant management | Process safety | Cyber security | Energy and emission management

## Market position

- #1** Ind. Steam Turbines & Generators
- #2** Compressors
- #2** Electrification, Automation, Digitalization
- #1** Electrolyzers



# Ensure resilient framework conditions

In today's geopolitically volatile landscape, the right framework conditions are pivotal to our business operations.

# Resilient Framework Conditions

## For Sustained and Profitable Growth



### Trade and Supply Chain

Resilient framework conditions for trade impact our business. Open markets reduce costs and drive growth. We must work towards diversified supply chains, fair markets, and international cooperation.

### Finance and Funding

Optimizing financial framework conditions and funding to support the development and deployment of key technologies is crucial for our company's competitiveness, financial flexibility, and sustainable growth.

### People and Labor

Optimizing our workforce to capitalize on growth opportunities is crucial. Ensuring that we have the right people in the right place at the right time is essential for maintaining competitiveness and driving growth.

### Bureaucracy and Taxes

Bureaucracy stifles innovation, limits competitiveness, and deters investments, hindering economic growth. Optimizing regulatory environments and corporate taxation levels is therefore crucial for managing global costs.



## Build Wind Power Capacity

Wind power is essential for a diversified energy mix, boosting competitive electrification, increasing energy resilience, lowering emissions and providing local economic benefit.

# Build Wind Power Capacity

No energy transition runs without wind



In 2024, the world saw a record installation of nearly 117 GW of new wind power capacity. To meet countries' energy and climate targets, renewable energy capacity needs to triple by 2030.

⇒ Visit website

## Our offerings

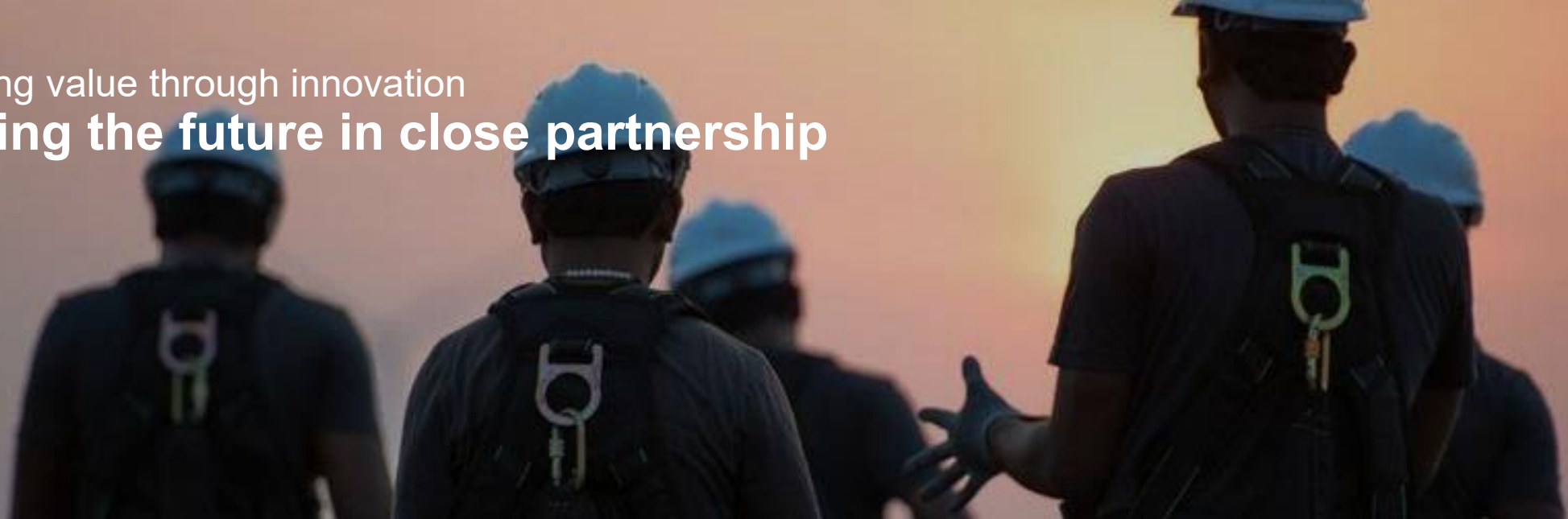
- Leading supplier of wind turbine technology and service solutions for onshore and offshore wind
- A product portfolio that covers the requirements of our customers and projects with varying wind conditions. Output: Up to 15 MW offshore and 7 MW onshore
- With an installed capacity of 150 GW (119 GW onshore and 31 GW offshore), Siemens Gamesa wind turbines generate enough clean energy to power around 148 million households.

## Market position

**#1** Offshore

**#3** Onshore

# Delivering value through innovation Creating the future in close partnership



R&D net spending  
**~€1.2 bn<sup>1</sup>**

Employees in R&D  
**4,100<sup>1</sup>**

## Global Innovation Centers

to drive partnerships & co-creation:



Orlando, United States of America



Berlin, Germany



Abu Dhabi, United Arab Emirates



Shenzhen, China

## Key R&D partners

**8**

of the top 25 world-ranked universities<sup>2</sup>

**150+**

Start-ups through Siemens Energy Ventures (external/internal)

⇒ Siemens Energy Innovations

<sup>1</sup> FY 2025 | <sup>2</sup> QS World University Rankings by Subject 2025: Engineering & Technology

# Strong ESG ratings and Decarbonization targets well on track in FY25

## Our journey toward a sustainable future



### Scope 1&2 emissions

Target: at least -60% absolute reduction (FY30 vs FY19)

**56%** reduction<sup>1</sup>

FY 2025

### Downstream emissions

At least 50% relative reduction of GHG from use of sold products by 2030

**49%** reduction<sup>1</sup>

### Upstream emissions

reduction of emissions by purchased goods & services by 30% per procurement volume by 2030

**24%** reduction<sup>2</sup>

### Gender equality

25% women in top leadership positions<sup>3</sup> by 2025 and 30% by 2030

**24%**<sup>4</sup>

### Zero harm

Total Recordable Injury Rate for employees and contractors (TRIR)<sup>5</sup>

**1.91**

- 19% down from FY24

<sup>1</sup> From a 2019 base year | <sup>2</sup> From a 2018 base year, kg CO<sub>2</sub>e/€ PVO spent | <sup>3</sup> Due to local legal requirements, U.S. is excluded from the scope of this target. Effective fiscal year 2025. Siemens Energy pursues the goal of an inclusive corporate culture and, in doing so, follows all applicable laws. To the extent any statements, goals, policies, or practices articulated in this presentation conflict with the anti-discrimination laws of the United States ("US"), the US entity will follow US law and not the policy. Siemens Energy, Inc. in the US does not make any employment decisions based on race, color, religion, sex, national origin, age, qualified individuals with disabilities, or any other category protected by applicable law. | <sup>4</sup> As of fiscal year 2025, we have reached 25% representation of women in top leadership positions globally, but due to the exclusion of U.S. - based on local legal requirements - the adjusted figure is 24% and the Company target is formally not met. | <sup>5</sup> Total Recordable Injury Rate: Number of recordable injuries x 1,000,000/work hours performed

# Energy4Good, Societal Engagement



## Access to Education

Promote Stem and Climate Education

(targeted at under-represented demographics)



## Driving Energy Transformation

Support clean Energy R&D and projects



## Sustaining Communities

Disaster Relief

(esp. related to electricity supply)



80% of our donations will support the three Strategic Pillars shown above, which are linked to the Siemens Energy's in-focus UN Sustainable Development Goals. 10% of the remaining will support causes important to our customers and partners, and the other 10% will support community engagement activities in areas where we have operations.



In times of geopolitical upheaval and energy realism,  
we remain committed to our purpose.

## **We energize society**

**That is what Siemens Energy stands for.**

# Thank you!

Stay in contact with us:

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[siemens-energy.com](http://siemens-energy.com)

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