

10.2019

ABB Marine Market

Marine, Power, Oil, Gas & Chemicals

Dr. Anıl Şerifsoy, Industry Segment Manager

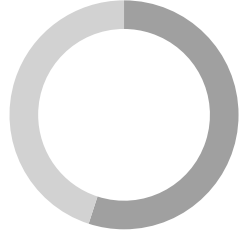
Pazarlar



ABB: Global Oyuncu

Team, culture and presence

Ciro Oranı 2017



- Gelişmiş marketler (56%)
- Gelişmekte olan marketler (44%)

Top 200 Yönetici

>3/4 İsveç ve İsviçre dışarısından
27 milliyetten
6 kıtadan

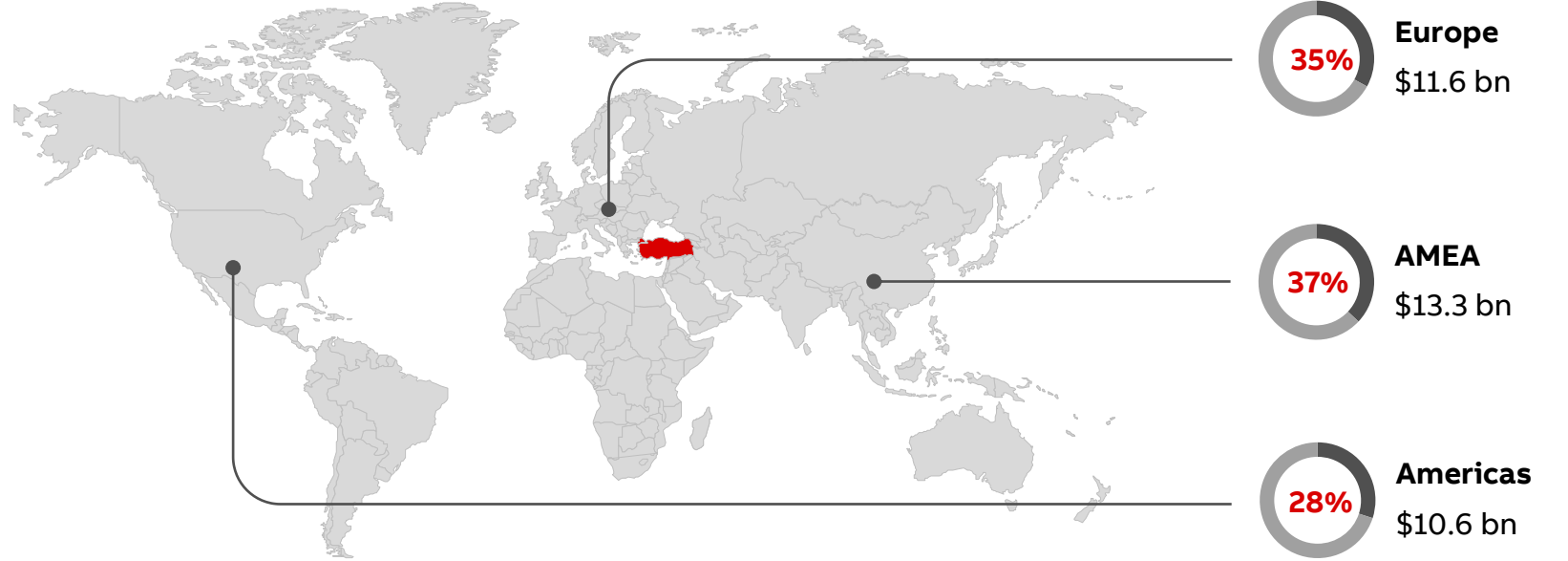


ABB has a unique global team with local presence everywhere

ABB: Teknoloji Lideri

Ne

(Offering)

Öncü Teknoloji

Ürün 58%

Sistem 24%

Servis ve yazılım 18%

Kime

Kamu

Endüstri

Altyapı ve ulaşım

~Cironun %35

~Cironun %40

~Cironun %25

Nereye

(Geographies)

Global

Asya, Ortadoğu, Afrika %37

Amerika %28

Avrupa %35

~\$34 Milyar Ciro

~100 Ülke

~135,000 Çalışan

Motion Divizyonu

Drives



~6.5
Milyar Ciro

~20,000
Çalışan

Motors and Generators



~42
Üretim Tesisi

~100
Ülke

Motor Generatör

Ne

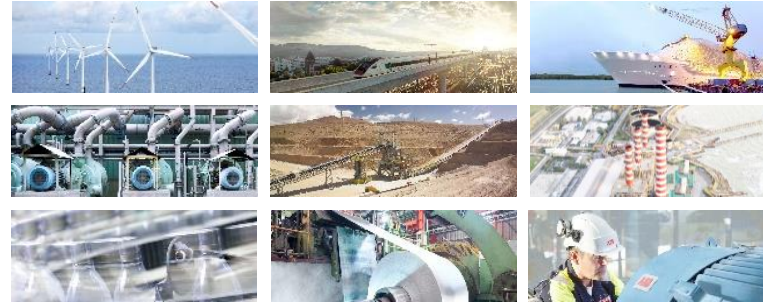


LV – Motors – HV

Gen

MPT

Kime



OEM

Distributors

EPC/SI/EU

Nereye



AMC

EUC

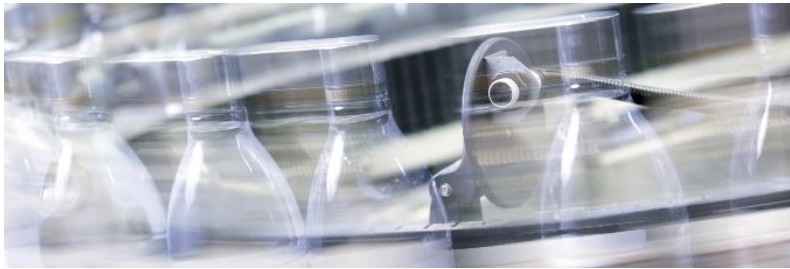
AMA

~13,000
50 den fazla
ülkede çalışan

31
Üretim tesisi

65
Ülkede

Pazarlarda ABB



Kurulu Güç

>43 milyon adet motor and generator



NEMA motors
Americas
27 millions



IEC LV motors
EUC, AMA
16 millions



**HV motors
& generators**
Americas
>20 000 pcs

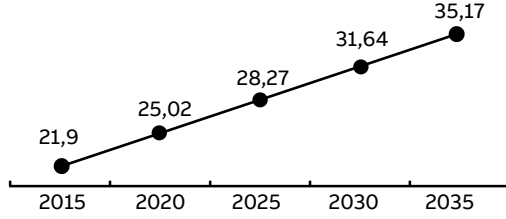


**HV motors
& generators**
EUC, AMA
>100 000 pcs

ABB'nin Odağı

ABB motors and generators help use energy more efficiently

World electricity consumption in trillion KWh



Elektrik Talebi

+%84

2050 yılına kadar

Enerji verimliliği ile elde edilebilecek enerji tasarrufu

60%

Motorlar dünyada tüketilen elektriğin

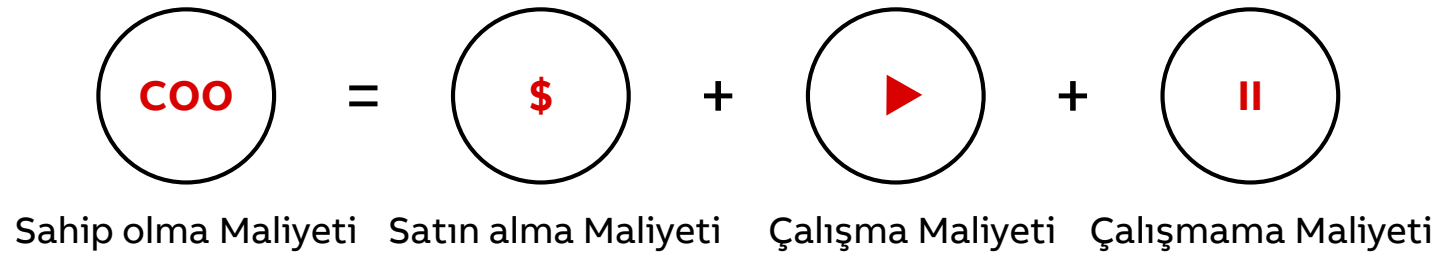
%28 'ini

kapsamaktadır





Sahip Olma Maliyeti



Değer Formulu

$$V_p = \frac{Q_p \times S_p^{\text{®}}}{C \times T}$$

V = Value

Q = Quality

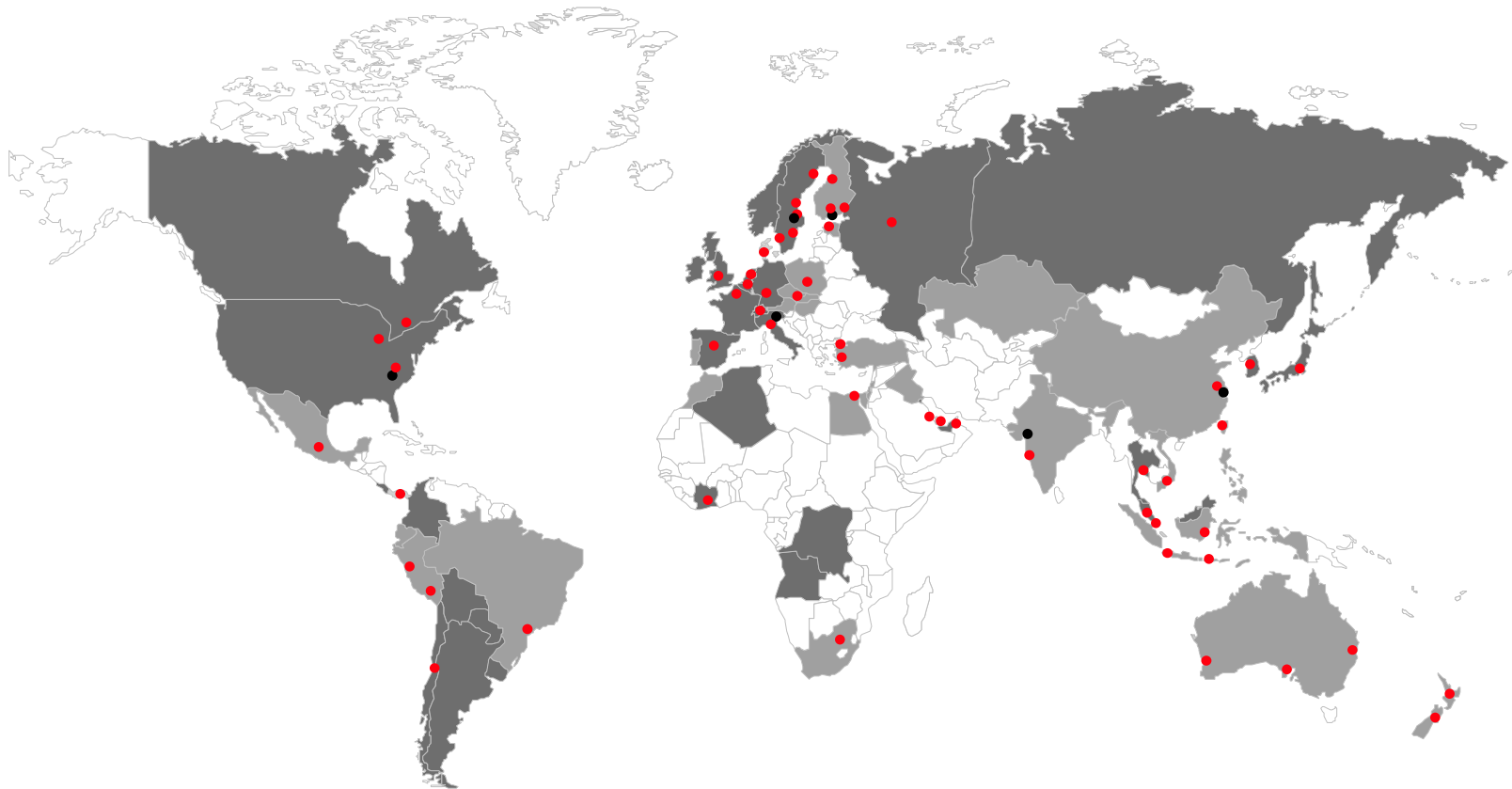
S = Service

C = Cost

T = Time

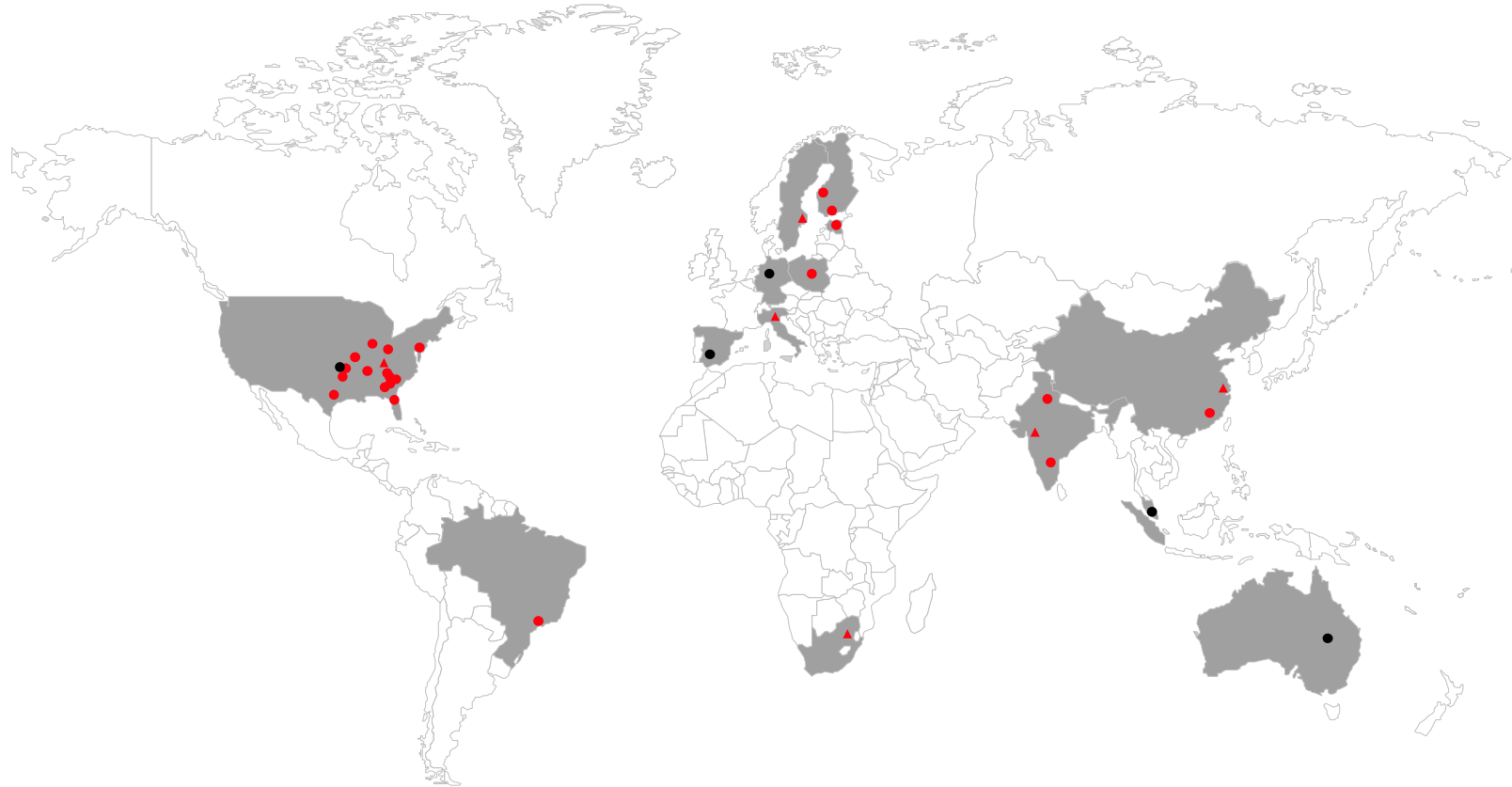
P = Perceived

Servis Ağı



- 6 global technical support centers
- More than 60 service centers
- More than 100 service providers

Üretim Tesisleri ve Logistik Merkezler



Ürün Grupları

IEC motors



NEMA motors



Generators



Mechanical power transmission products



Services

- **Low voltage high efficiency motors**
- **High voltage induction and synchronous motors**
- Motors for explosive atmospheres
- **Permanent magnet motors**
- DC motors
- Traction motors
- **Motors for marine**
- Synchronous reluctance motors
- Servomotors
- **Motors for variable speed applications**

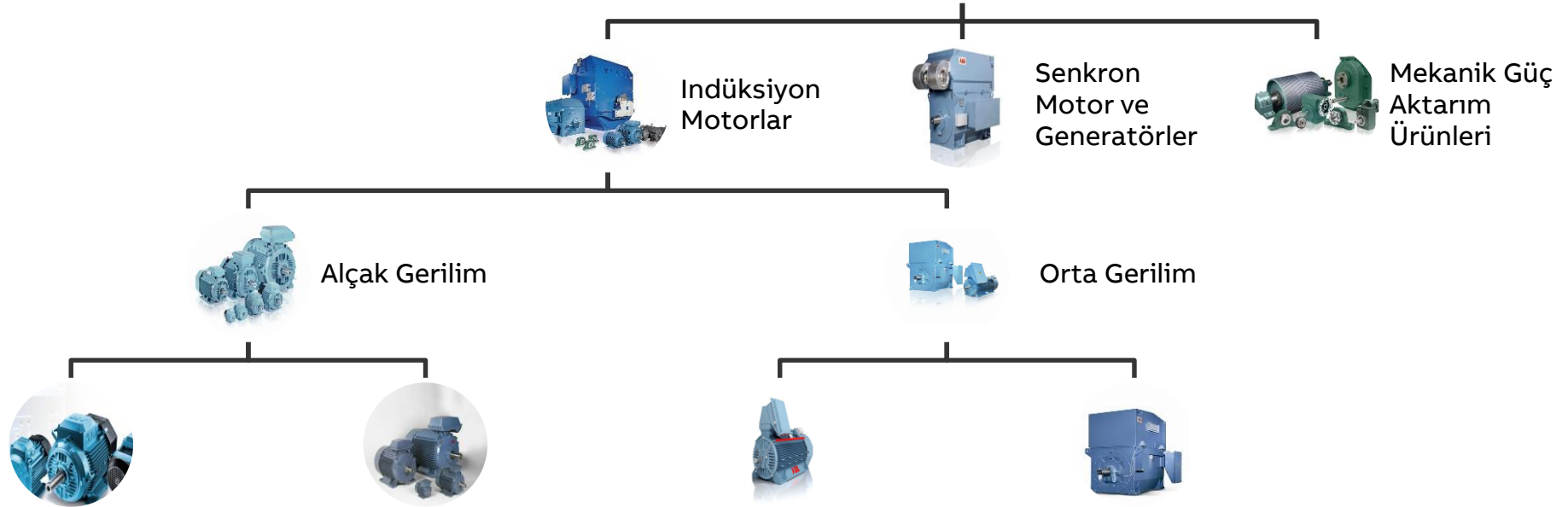
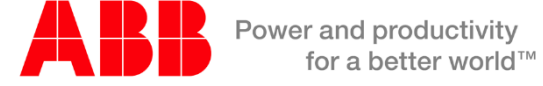
- Low voltage high efficiency motors
- High voltage induction and synchronous motors
- Motors for explosive atmospheres
- Permanent magnet motors
- Washdown motors
- DC motors
- Traction motors
- Motors for marine applications
- Servomotors
- Motors for variable speed applications

- Induction and synchronous wind power generators
- **Synchronous generators for diesel and gas engines**
- Synchronous generators for steam and gas turbines
- **Synchronous generators for marine applications**
- Synchronous generators for industrial applications
- Synchronous condensers for reactive power compensation
- Traction generators

- Mounted bearings
- Enclosed gearing
- Mechanical drive components
- Couplings
- Sheaves and bushings
- Conveyor components
- Geared motor units

Motor Ve Generatörler

Ürün Gamı



Motor Generator Grubu

Generators



Power: up to 85 MVA
Voltage: up to 15 kV



IEC motors



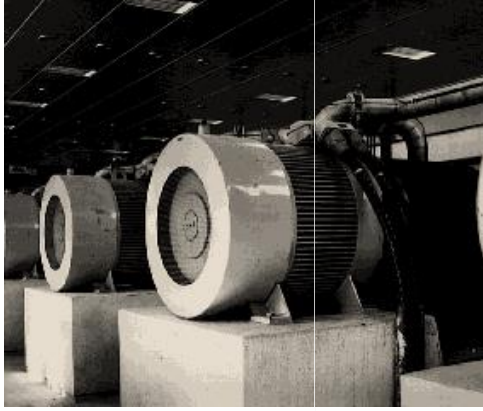
Power:
0.1 kW – 75 MW
Voltage:
110 V – 15 kV

NEMA motors



Power:
1/50 – 4,000 HP
Voltage:
110 V – 7,2 kV

□□□ Döküm Gövde Motorlar



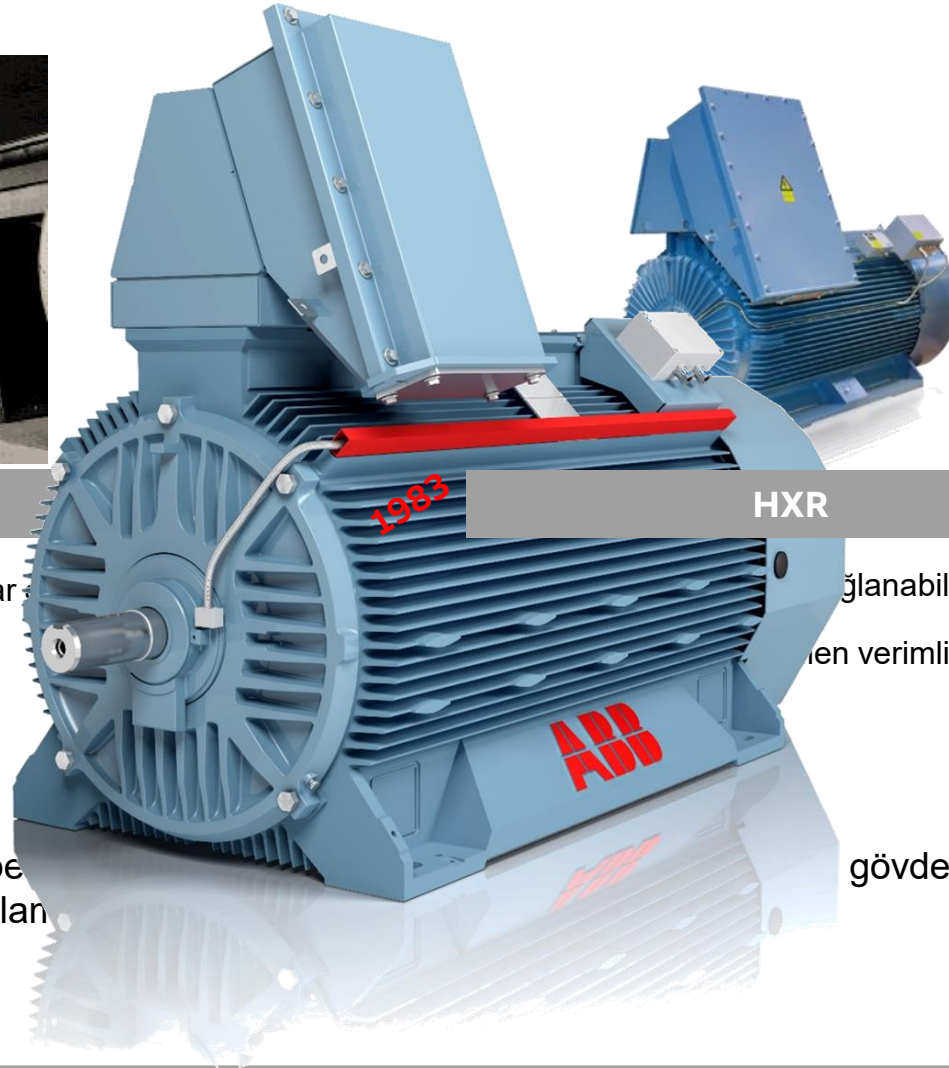
1900s

HZUR

Seri üretim için tasarlanmış motorlar

1963

Anahtar



1983

HXR

İşletilebilirliği için birkaç
en verimlilik lideri motor

2014

NXR / AXR

Son teknoloji çözümleri ile
yüksek verim

- 100 Yıllık tecrübe
yeni dönem başlan

gövde motorlarlarda

inovasyon (1/2)

ABB Ability™ Smart Sensors.



High efficiency motors



Washdown motors and mechanical power transmission



Low voltage motors for underground mining



inovasyon (2/2)

Water-cooled marine motor



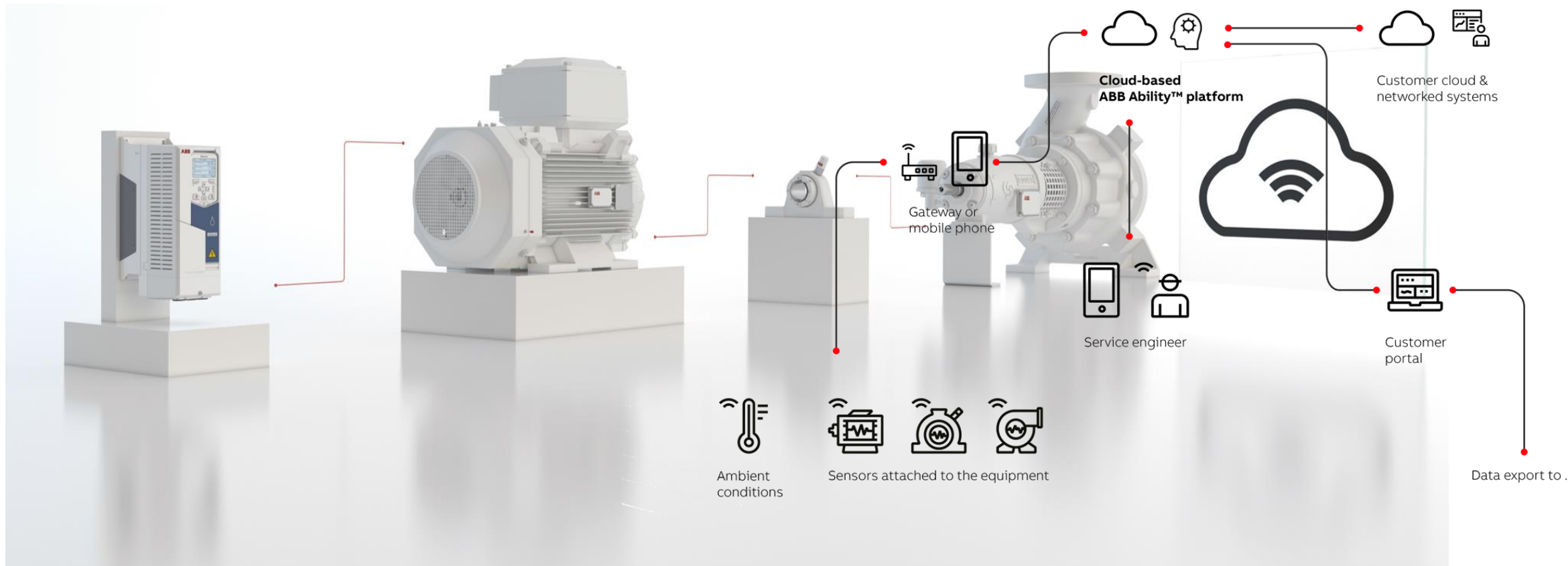
Modular induction motor



Compact HV generators



ABB ve Dijitalizasyon

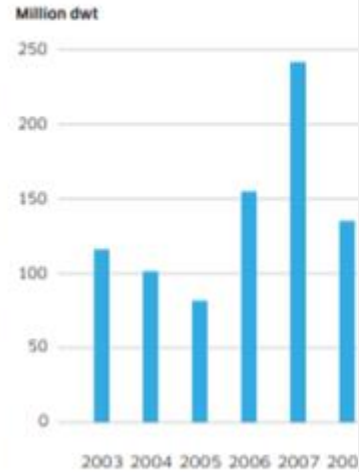


Dünyada Gemi İnşa

Orderbook		2016	2017
China	Market share	44.9%	44.8%
	Ships	1,351	1,267
Korea	Market share	22.0%	24.7%
	Ships	475	422
Japan	Market share	26.6%	23.8%
	Ships	901	717
Europe	Market share	2.0%	1.9%
	Ships	266	252
ROW	Market share	4.6%	4.6%
	Ships	234	227
		m dwt	10.2

■ Deliveries ■ Demolitions — Fleet Evolution

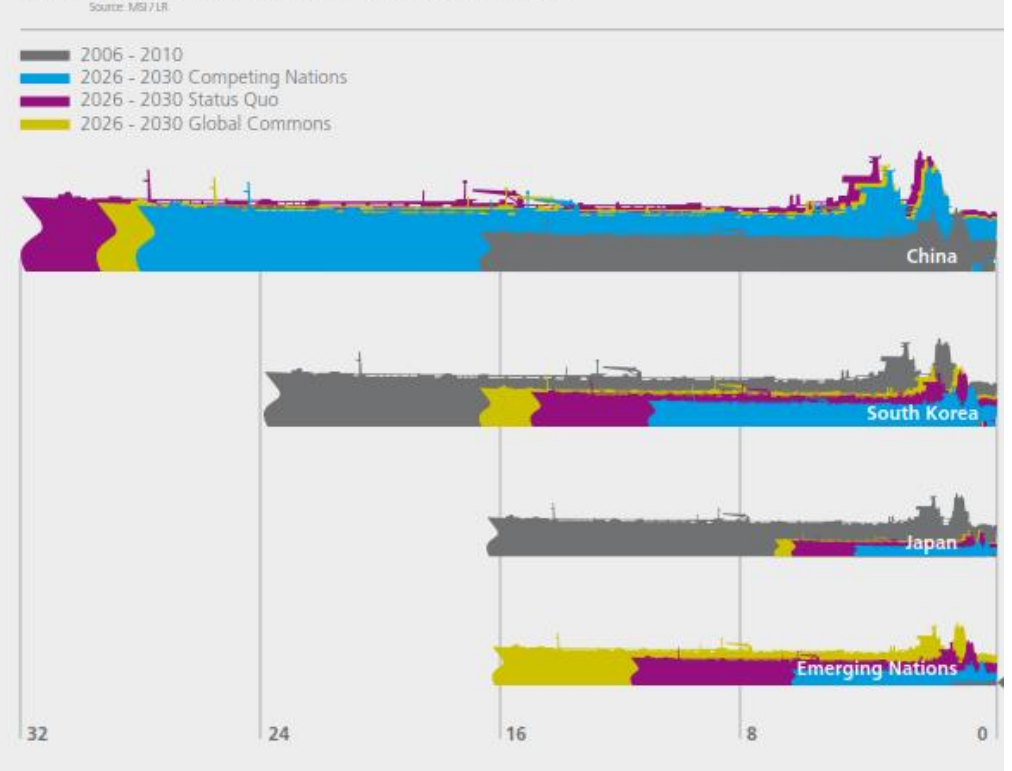
Orders



Shipbuilding market

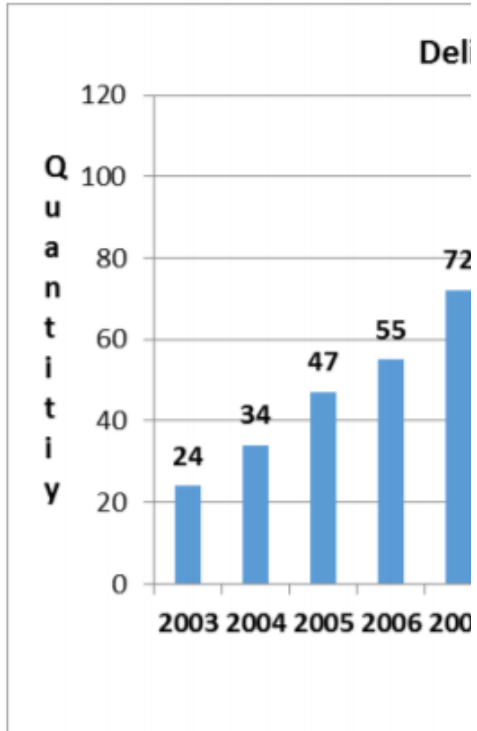
Bulk Carrier, Tanker, LNG, containership
The total deliveries will remain at the current level in 2030. China and emerging countries will determine the ship newbuilding market landscape after 20 years.

Fig. 72 Bulk Carrier, Tanker, LNG, Containership (million GT)



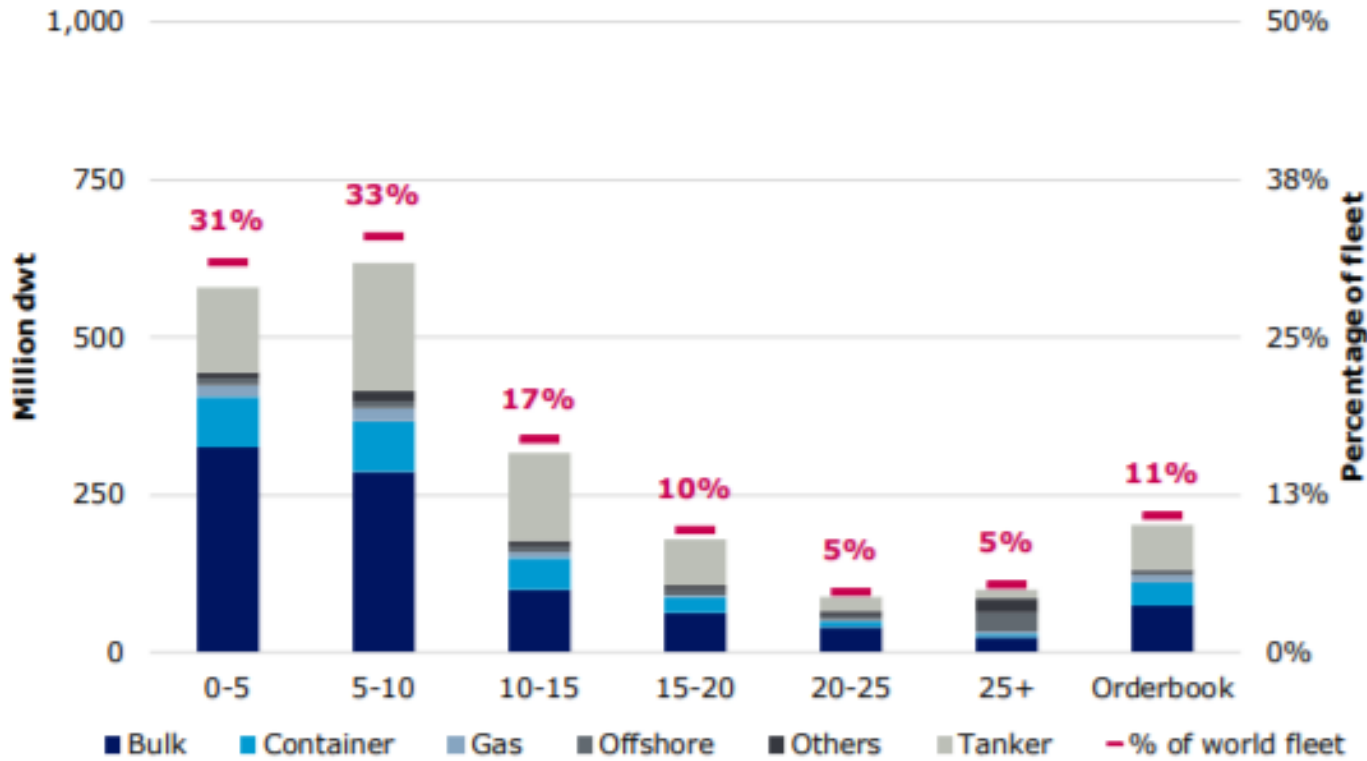
Türkiye’de Gemi İnşa ve Bakım

GRAPH(36): Number of Ship Delivered

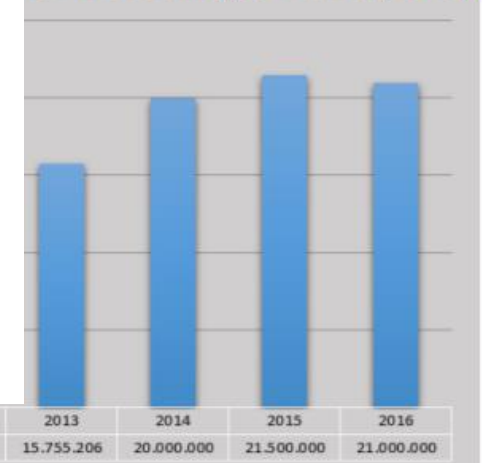


2017: 64% of the world fleet is younger than 10 years

Only 10% of the world fleet is 20 years or older



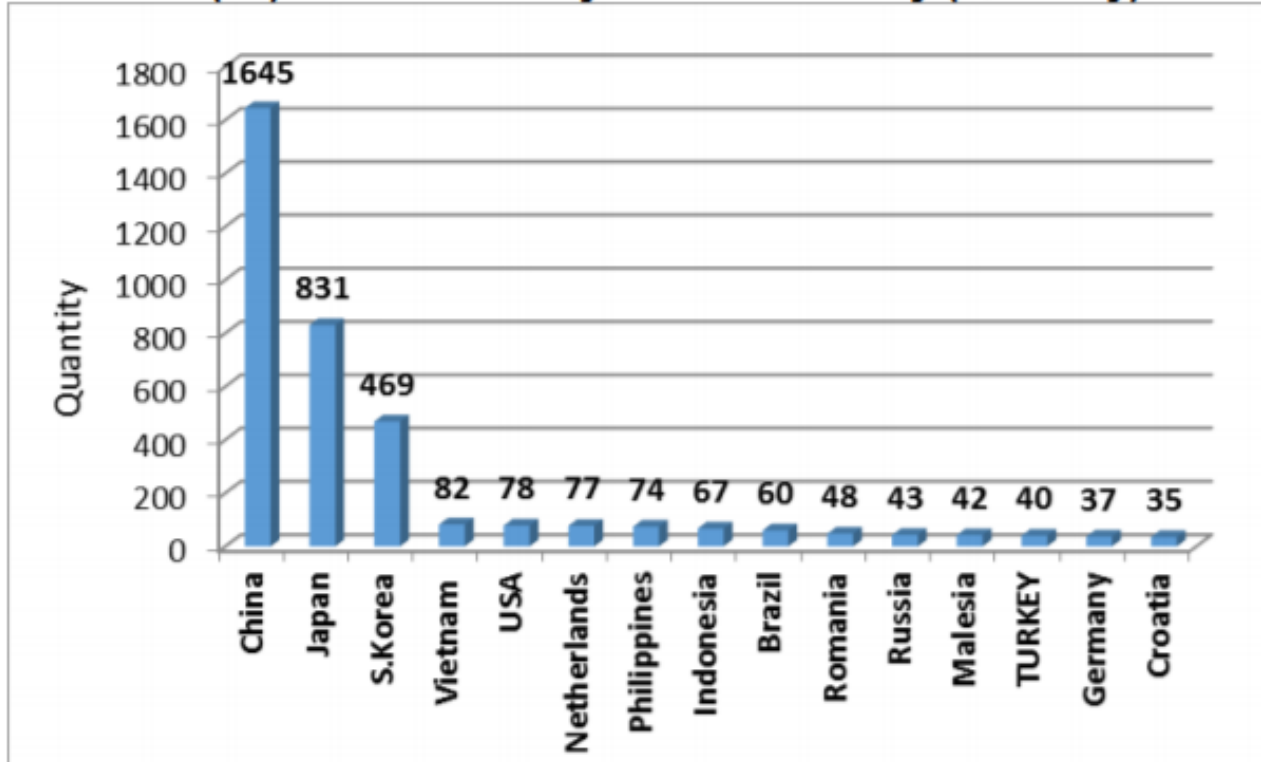
Ship Deliveries According to Years (2016)



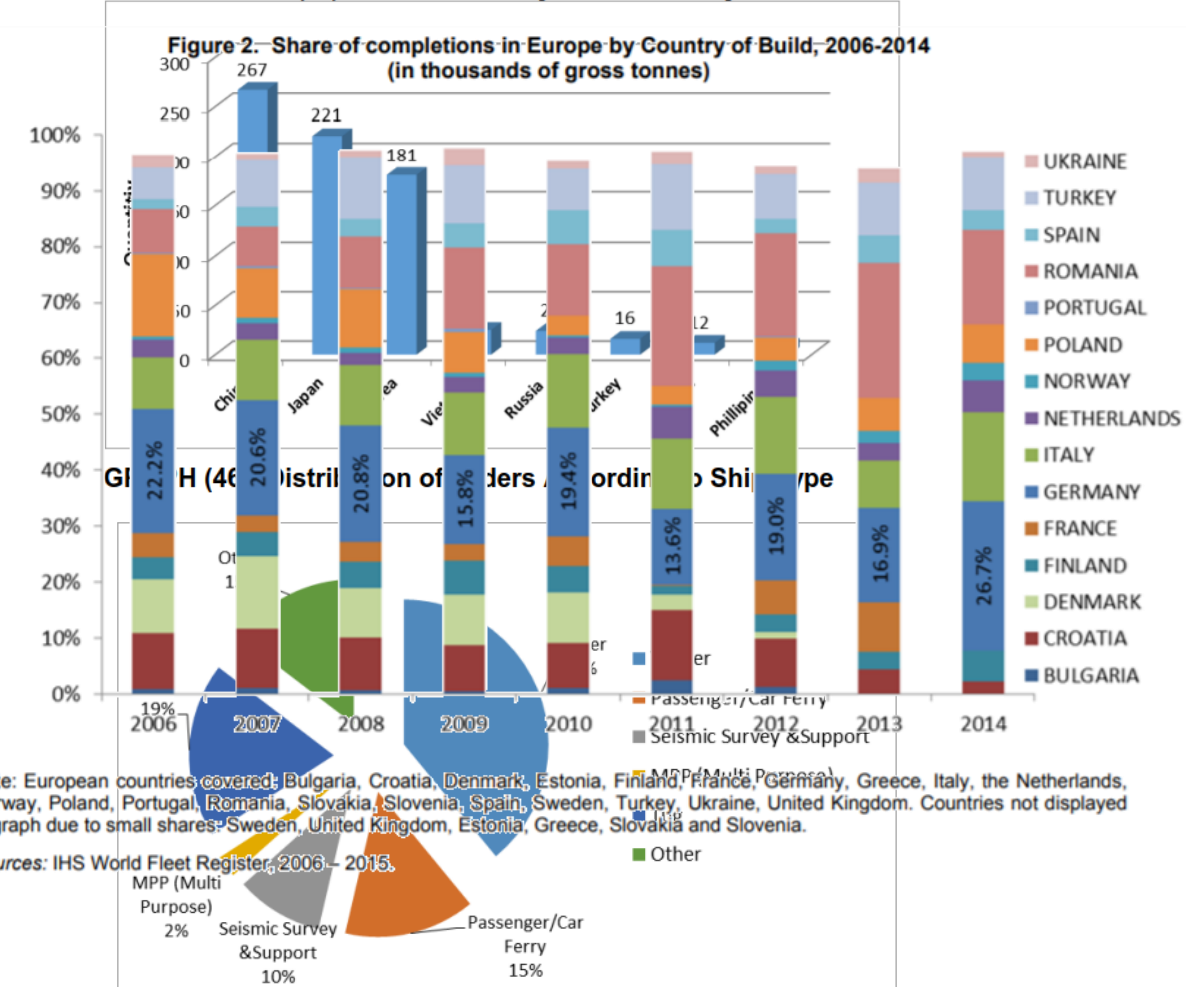
	2008	2009	2010	2011	2012	2013	2014	2015	2016
DWT	8,433,000	10,260,400	10,707,057	13,071,654	15,272,490	15,755,206	20,000,000	21,500,000	21,000,000

Gemi İnşa Sektöründe Türkiye'nin Durumu

GRAPH (42): Order Book by Builder Country (Quantity)



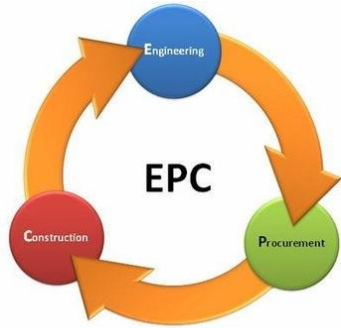
GRAPH (44): Tanker Orders by Builder Country



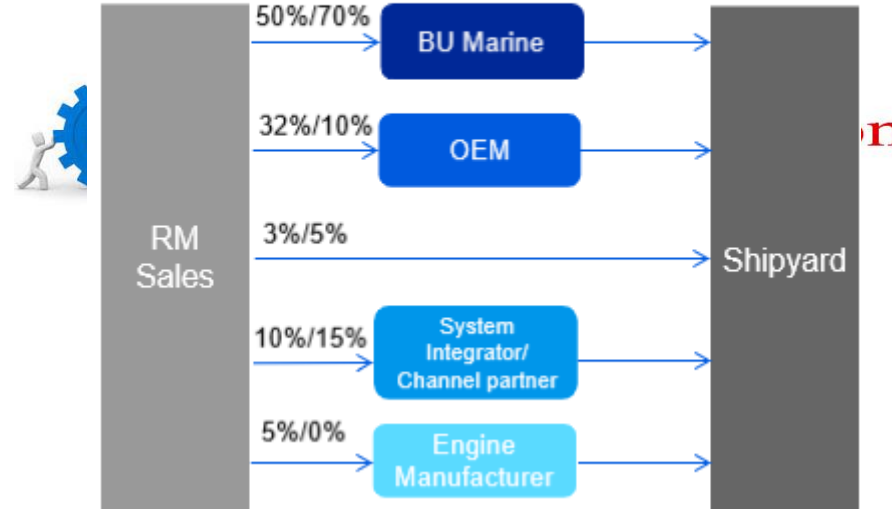
Satış Haritası



Channels



RMMG/RMDR



DESIGN

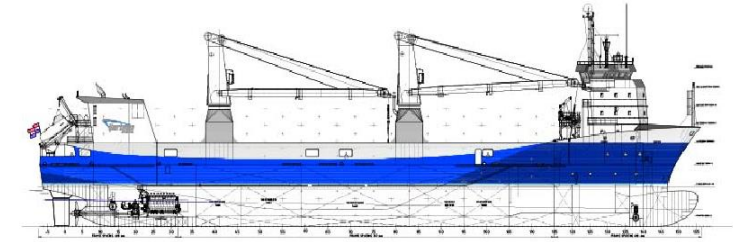
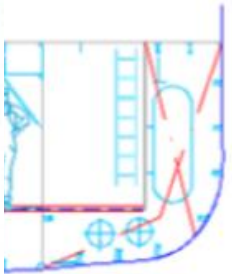
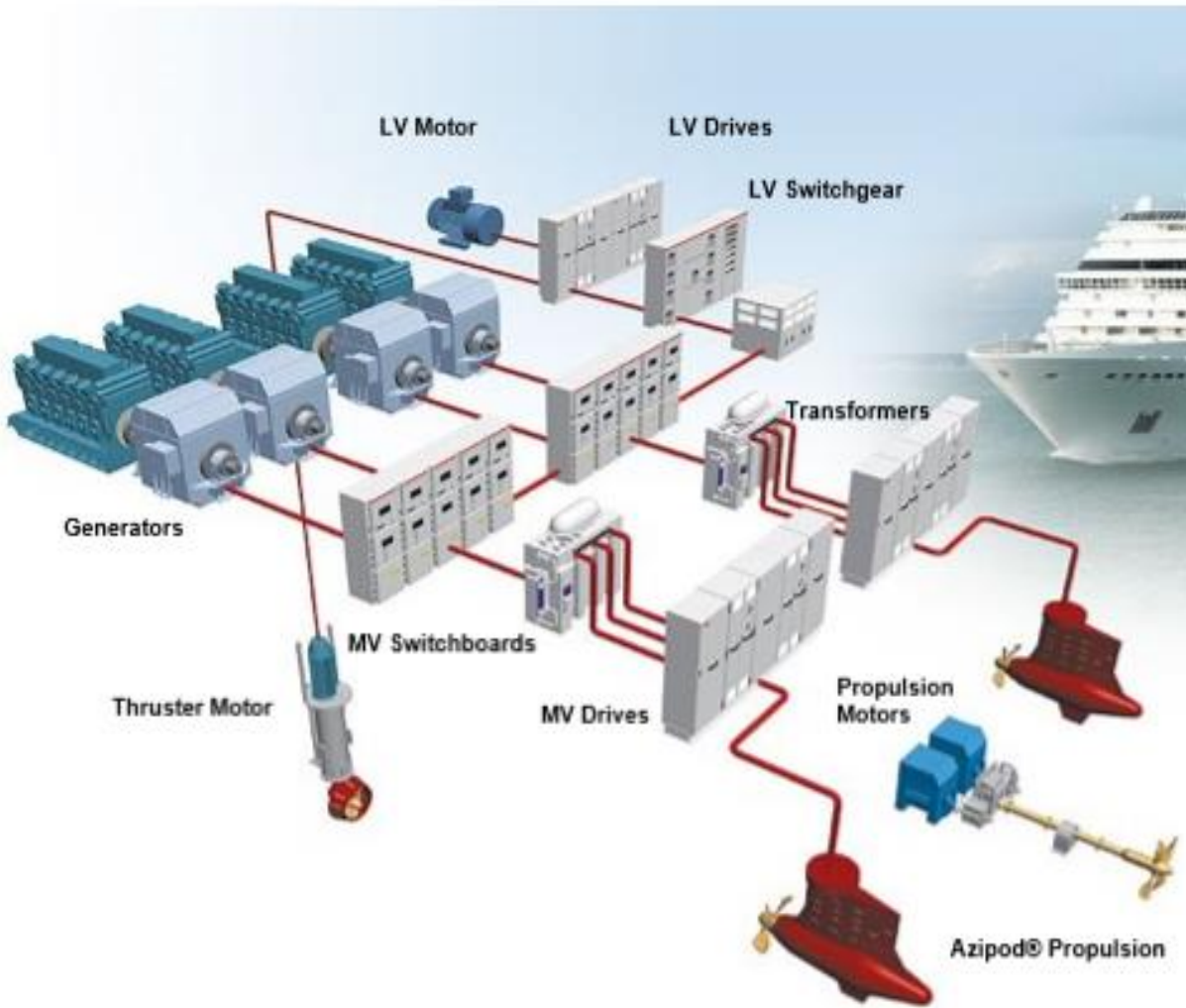


ABB Power and productivity for a better world™

Uygulama Alanı



- LV motors** in engine room, steering pumps, cargo pumps, ventilation fans, deck cranes, thrusters, winches, hydraulic power packs and compressors
- LV drives** in main propulsion, steering, thrusters, compressors, pumps, fans and winches
- MV drives** in main propulsion, steering, thrusters, compressors
- HV motors, HV and LV generators** in main propulsion, thrusters, compressors, pumps, fans and winches





ABB