



Siemens Vertical Market

An Introduction to SFS

“Give More than you Take!”

Food and Beverage Vertical – USA

With J. Parrott and V. Bhawar



Strategic Priorities

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Siemens Company

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Market Approach & Strategy

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Vertical Structure (Our People)

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Food and Beverage Subsegmentation

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Food and Beverage Centers of Competence

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Food and Beverage Trends and Impact

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Food and Beverage Solutions Examples

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Our Value Proposition “Why Siemens”

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Strategic Priorities

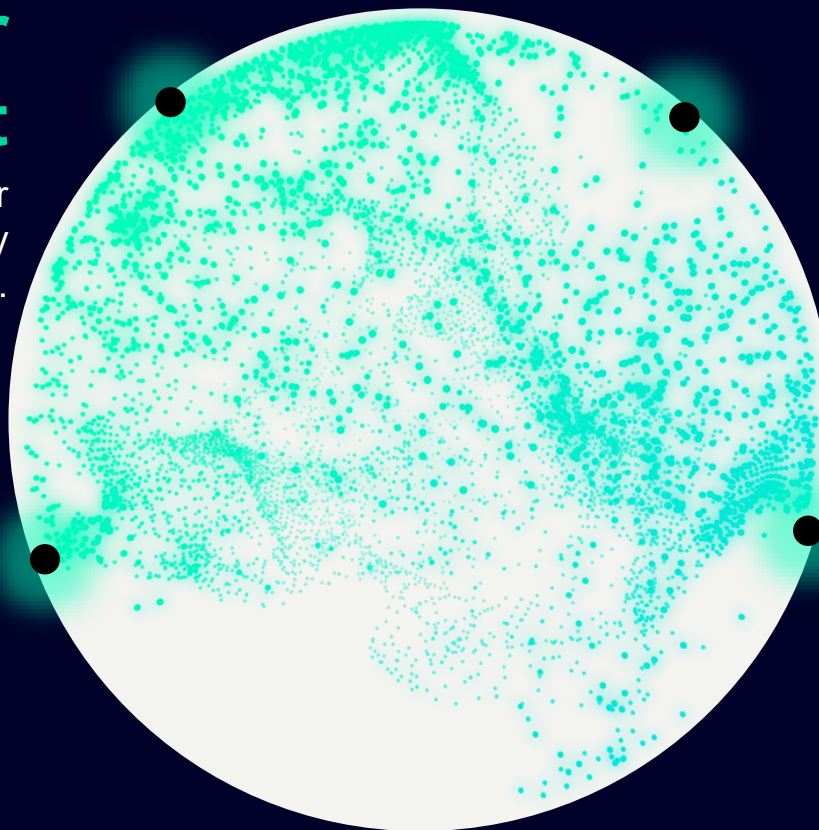
Our four strategic priorities

Customer impact

We anticipate what our customers need before they even know they need it.

Technology with purpose

Innovative technology has been at the core of Siemens for more than 170 years and it will remain at the core of the future we're building.



Empowered people

Driving progress through empowering our customers, partners and employees.

Growth mindset

Rather than make yesterday last, we are committed to building tomorrow – by learning and being open to change.

Siemens Company



As a focused technology company, we empower our customers to transform their industries and markets, helping them to transform the everyday

303,000

employees¹

€62.3 bn

in revenue²

€6.7 bn

in net income³

15.0%

adjusted EBITA margin
for the Industrial
Businesses²

¹ As of September 30, 2021 | ² For fiscal 2021 | ³ Continuing and discontinued operations

A new chapter in the history of Siemens AG

Company setup as of October 1, 2020

Businesses

Digital Industries



Smart Infrastructure



Siemens Advanta



Mobility



Portfolio Companies



Siemens Healthineers¹



Countries

Service & Governance

¹ Siemens Healthineers with its own setup for Countries and Service & Governance

Siemens Digital Industries

Siemens AG

Digital Industries



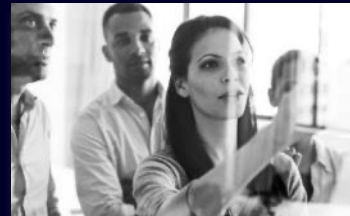
Smart Infrastructure



Mobility



Siemens Advanta



Portfolio Companies



Siemens Healthineers



Software



#1 market position

Factory Automation



#1 market position

Motion Control



Process Automation



Customer Services



Leader in digitalization, automation and electrification

Siemens Digital Industries

Siemens AG

Digital
Industries



Smart
Infrastructure



Mobility



Siemens Advanta



Portfolio Companies



Siemens
Healthineers



Electrical products



Building Products



Distribution Systems



Digital Grid



Regional Solutions &
Services



Leader in digitalization, automation and **electrification**

Siemens Software continues to expand its portfolio with huge investment to combine the real world with the virtual world



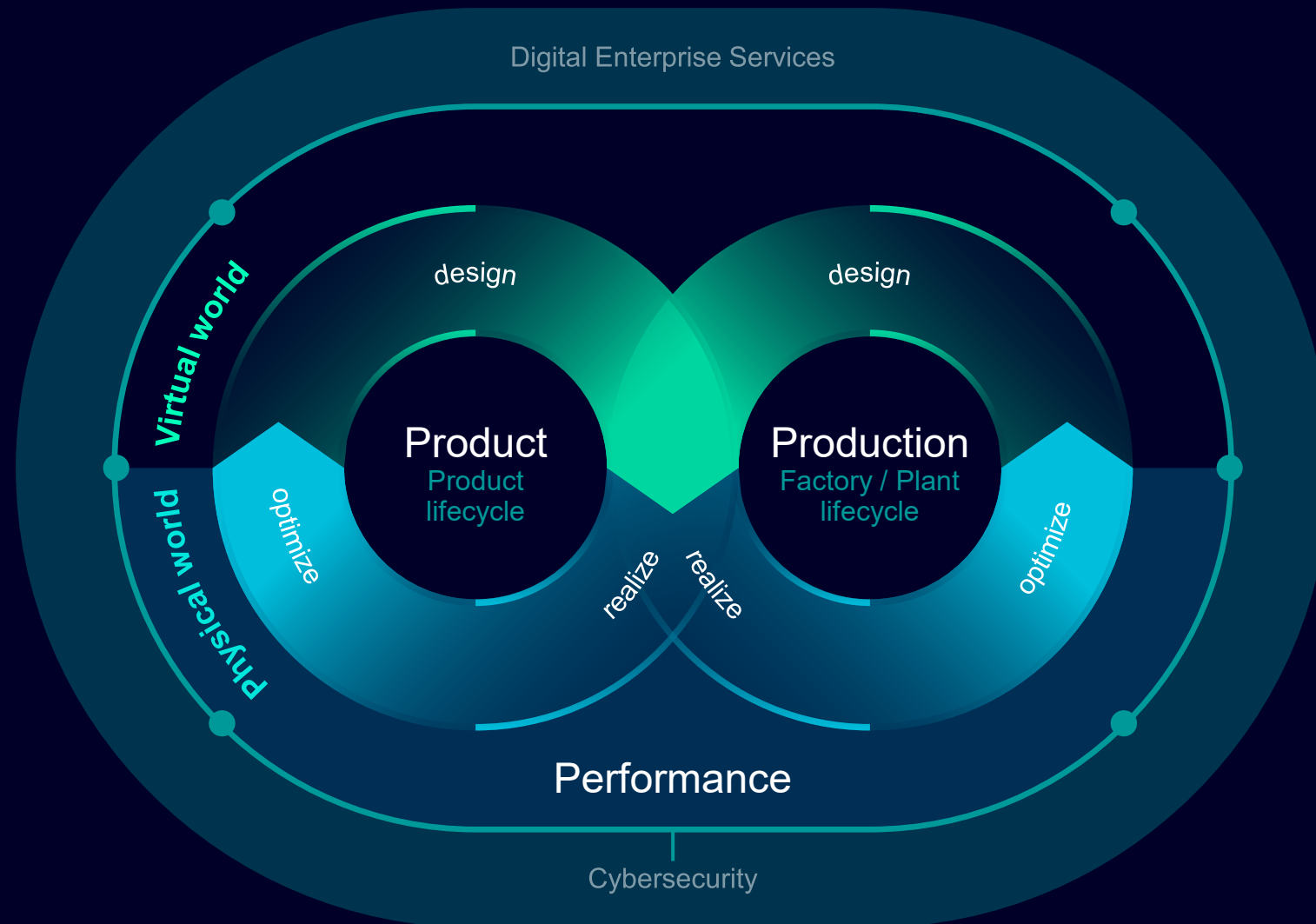
> 15 billion € investment

12,700 software engineers are shaping the digital transformation

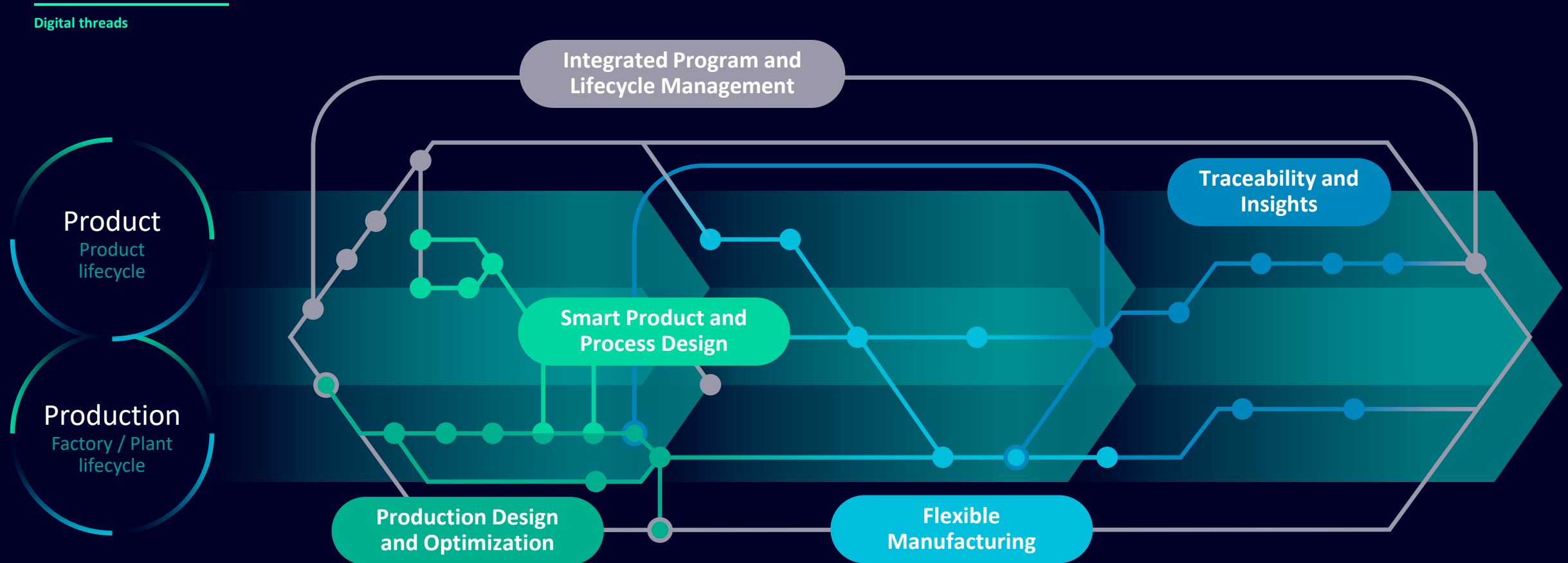
Selection of acquisitions



Comprehensive Digital Twin integrating product, production, and performance



Next level flexibility with digital threads



IT / OT Convergence

“Give More than you Take!”



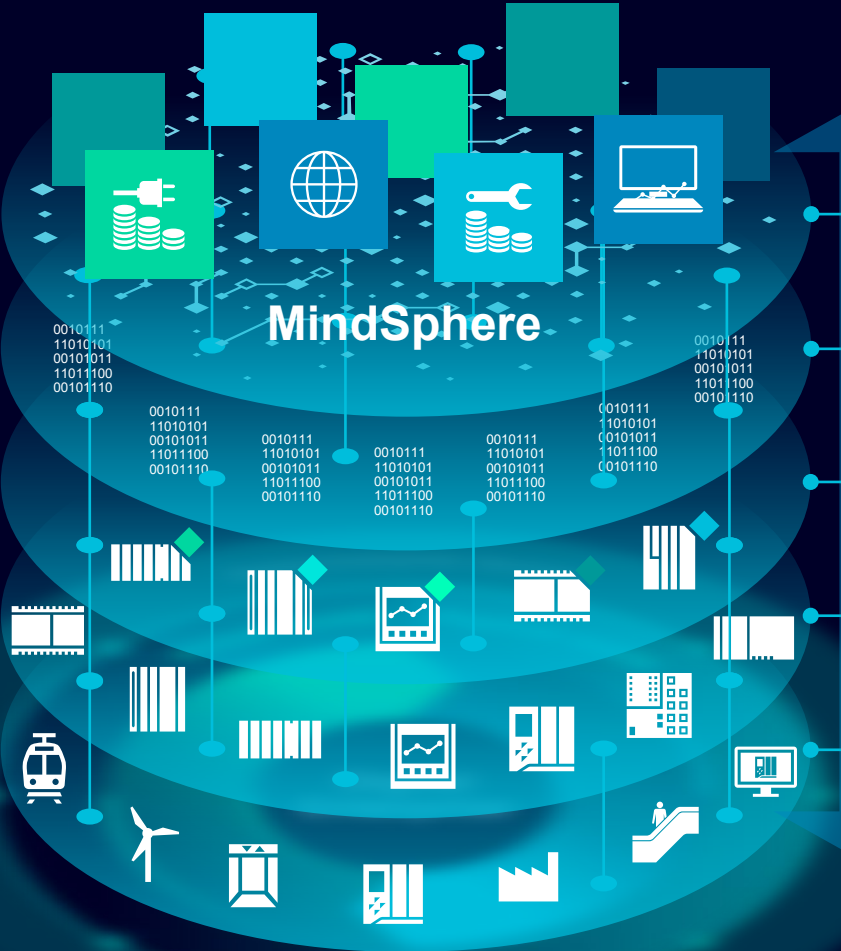
Comprehensive Digital Twin



Personalized Adaptable/ Modern



Flexible Open Ecosystem



Information Technology (IT)

Operation Technology (OT)

- Cloud / MindSphere
- Software for vertical integration
- Industrial Edge
- Controller / automation platforms
- Field devices

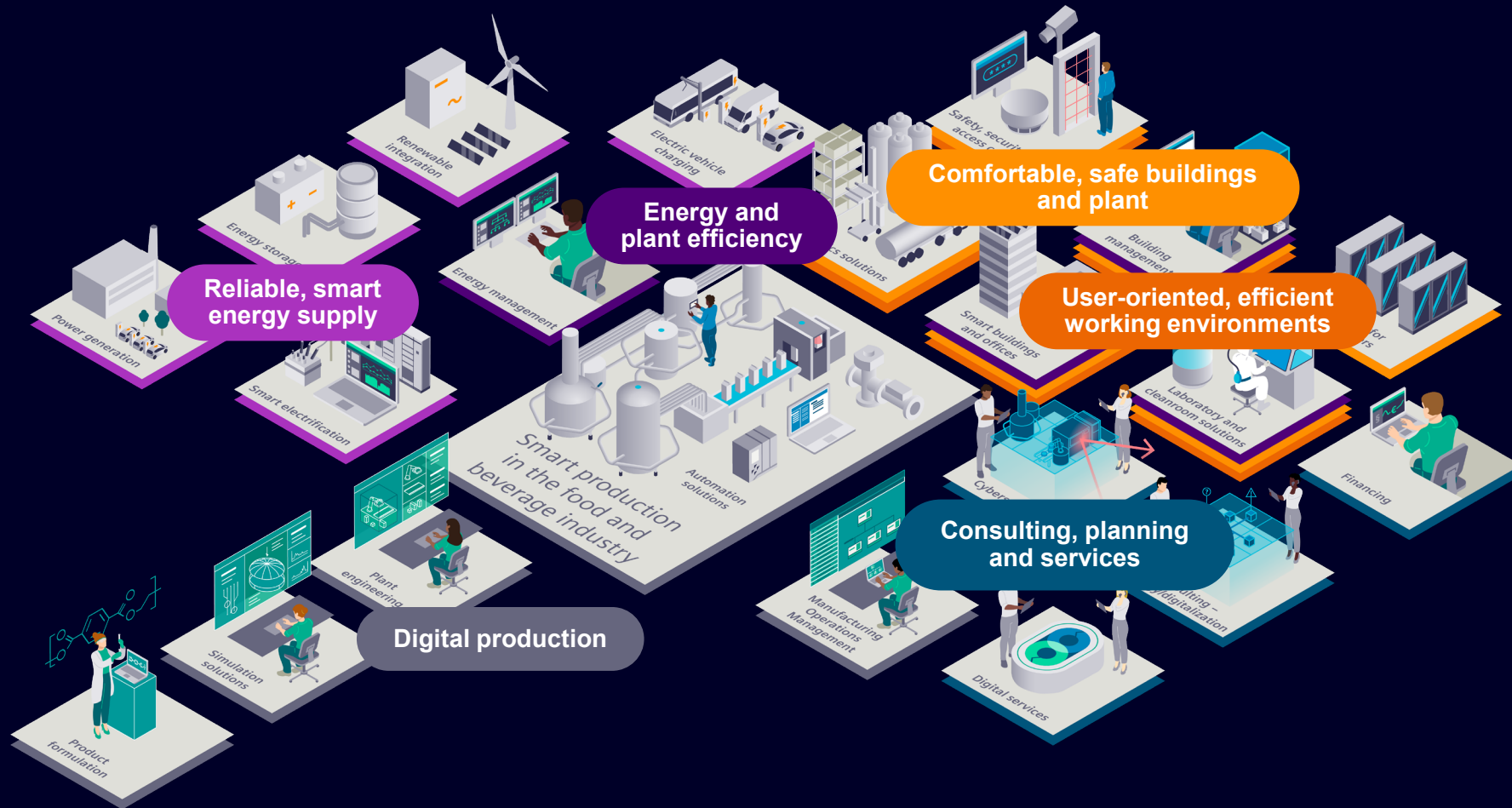
- Low-code app development
- Communication platforms
- Cybersecurity

Virtual

Physical

Comprehensive offerings

to support our customer transferring to sustainable and digital enterprise

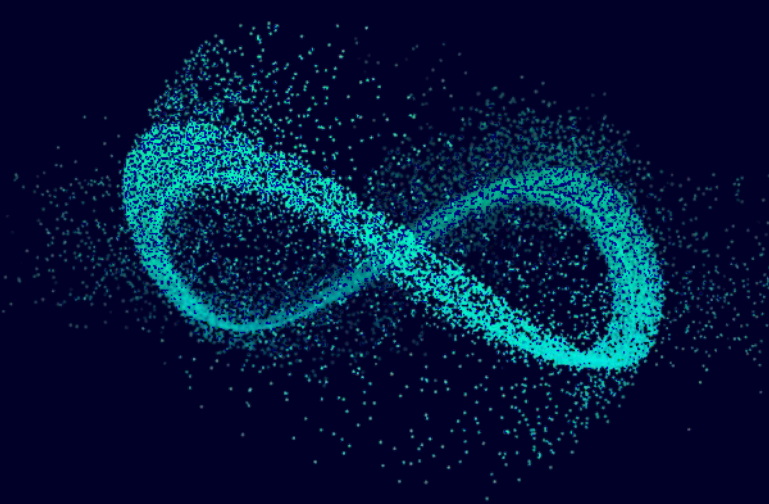


Market Approach & Strategy

By combining the real and the digital worlds, Siemens empowers customers to master their digital transformation and sustainability challenges



Real
world



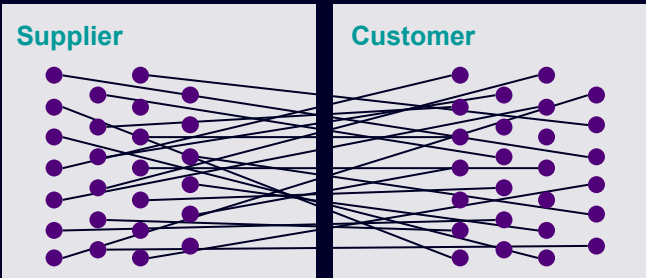
Digital
world



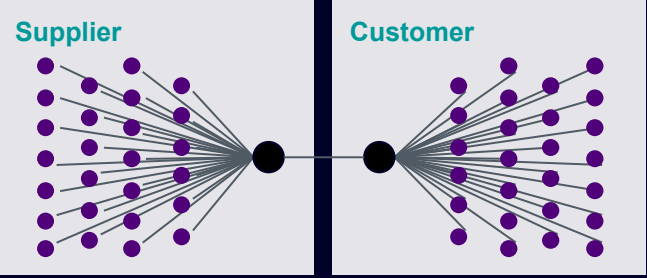
Key Account Manager – Consultant/advocate for the customer

Architect of a customer specific structure for Siemens

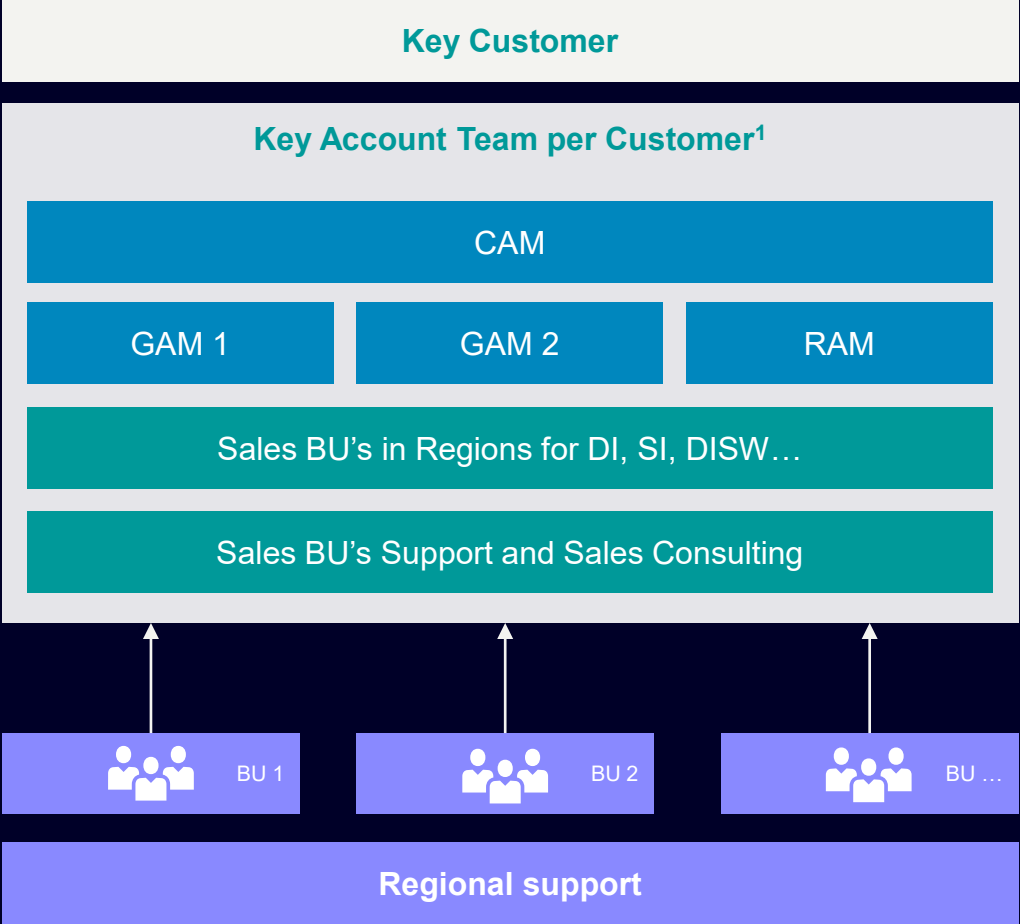
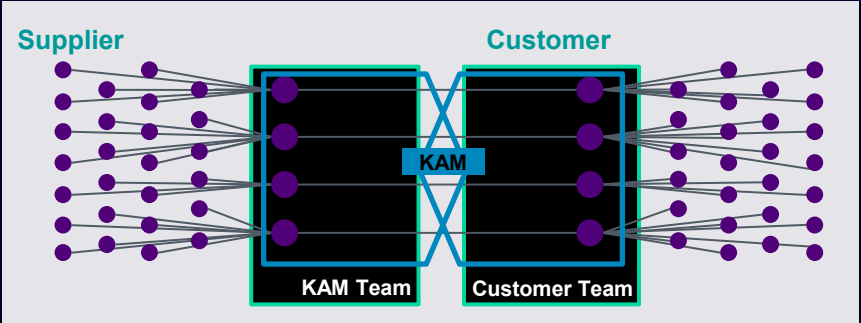
From chaos ...



... and bottlenecks ...

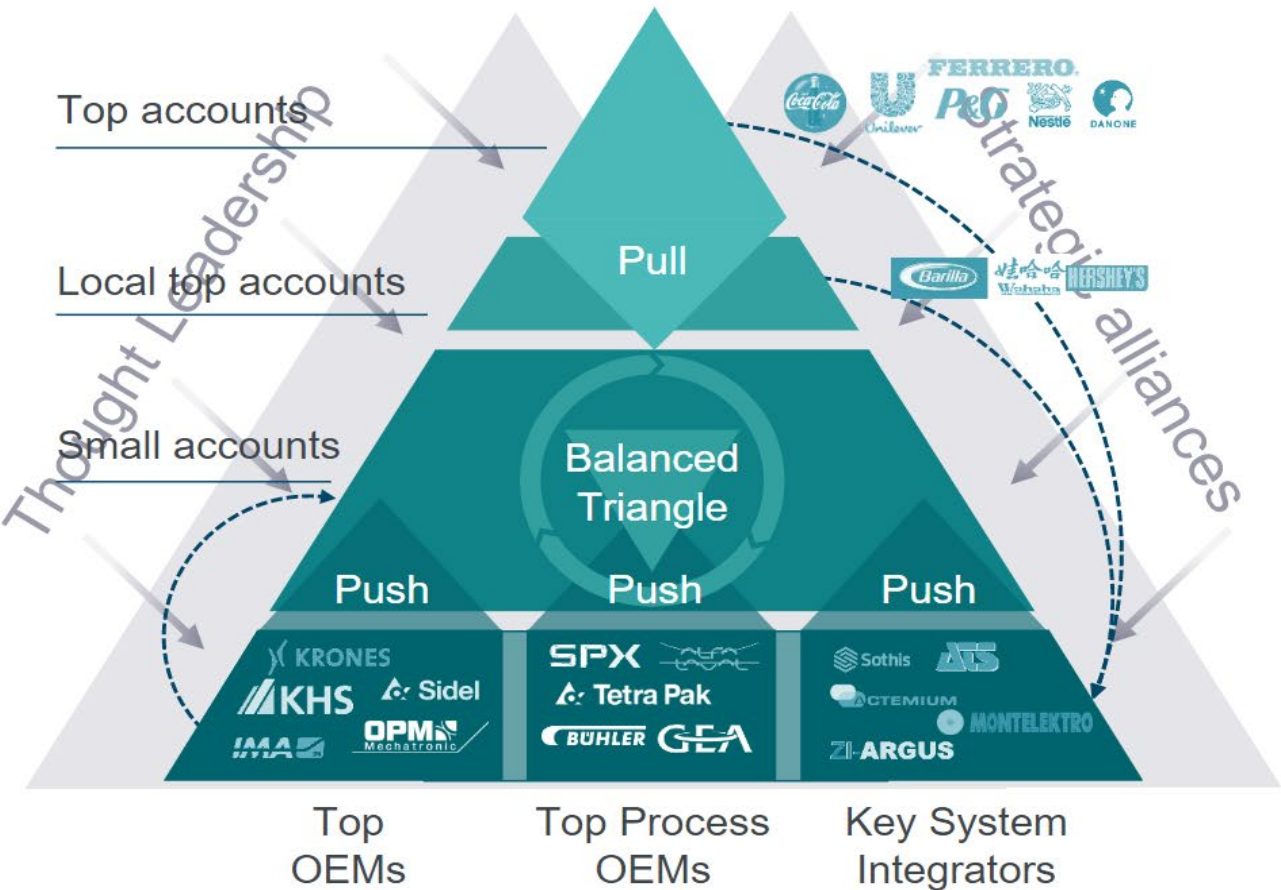


... to structure



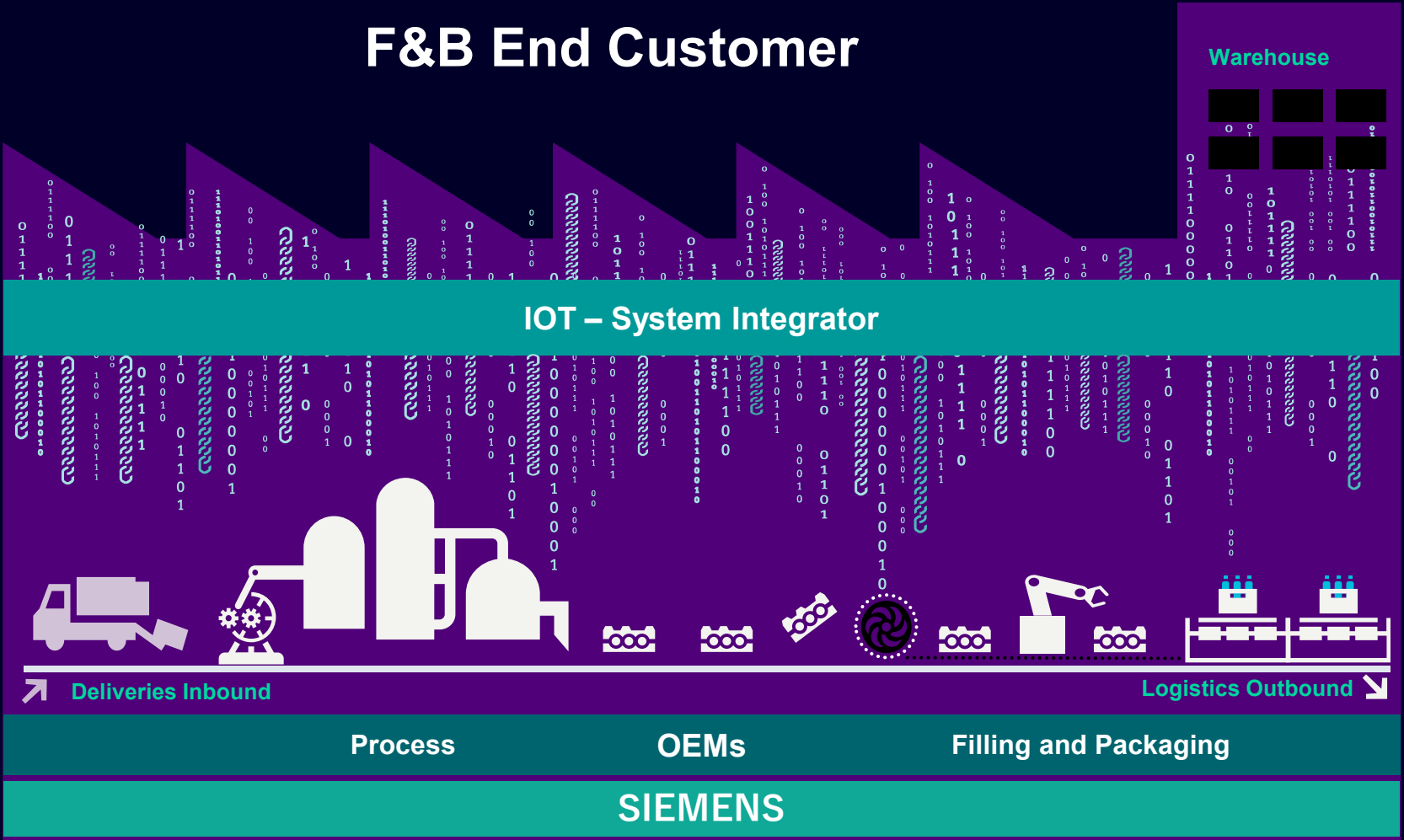
¹ Example for a customer specific design

Vertical Market Food & Beverage – 5+2 strategic initiatives create impact on complete ecosystem & market



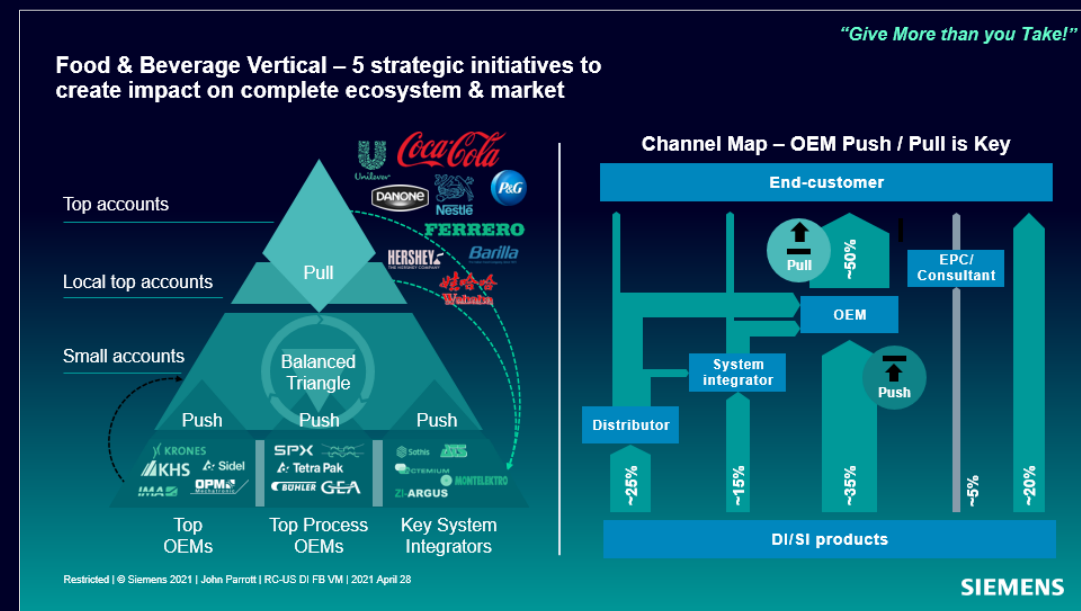
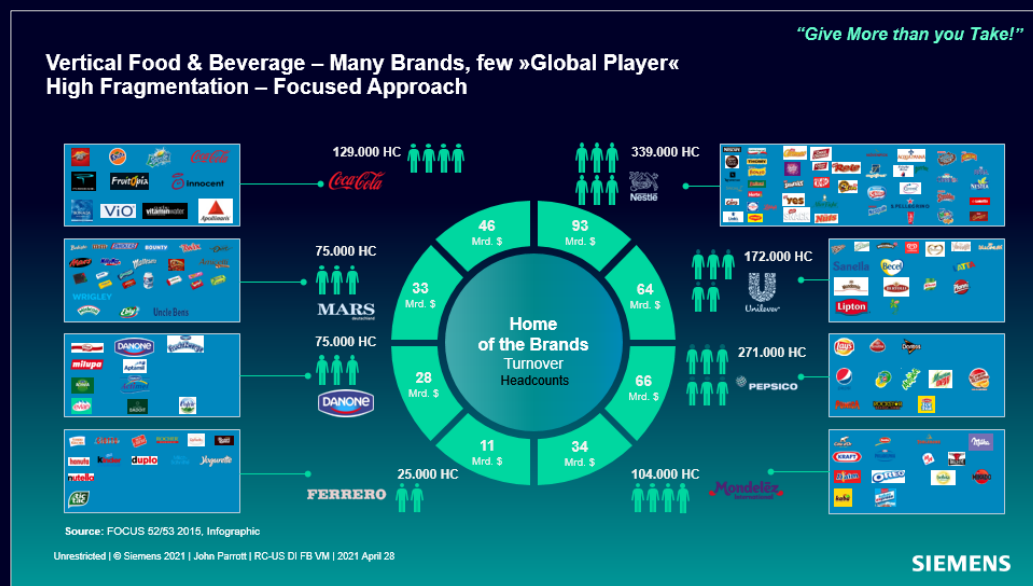
Top Accounts	Implement Key Account Management for Key Customers in HQ & Regions
Push/Pull	Enhanced orchestration of End Customer and OEM approaches
Process OEM's	Taking Global F&B Process OEMs on board in F&B Ecosystem
System Integrators	Roll-out of F&B System Integrators business development activities
F&B Solutions	Roll-out of F&B Solution strategy Own solutions in Key-Accounts
Alliances	Leverage alliances to increase impact in F&B IT/OT ecosystem
Thought Leadership	Influence market and decision makers by strategic global communication

We provide solution and service throughout the complete F&B Ecosystem!

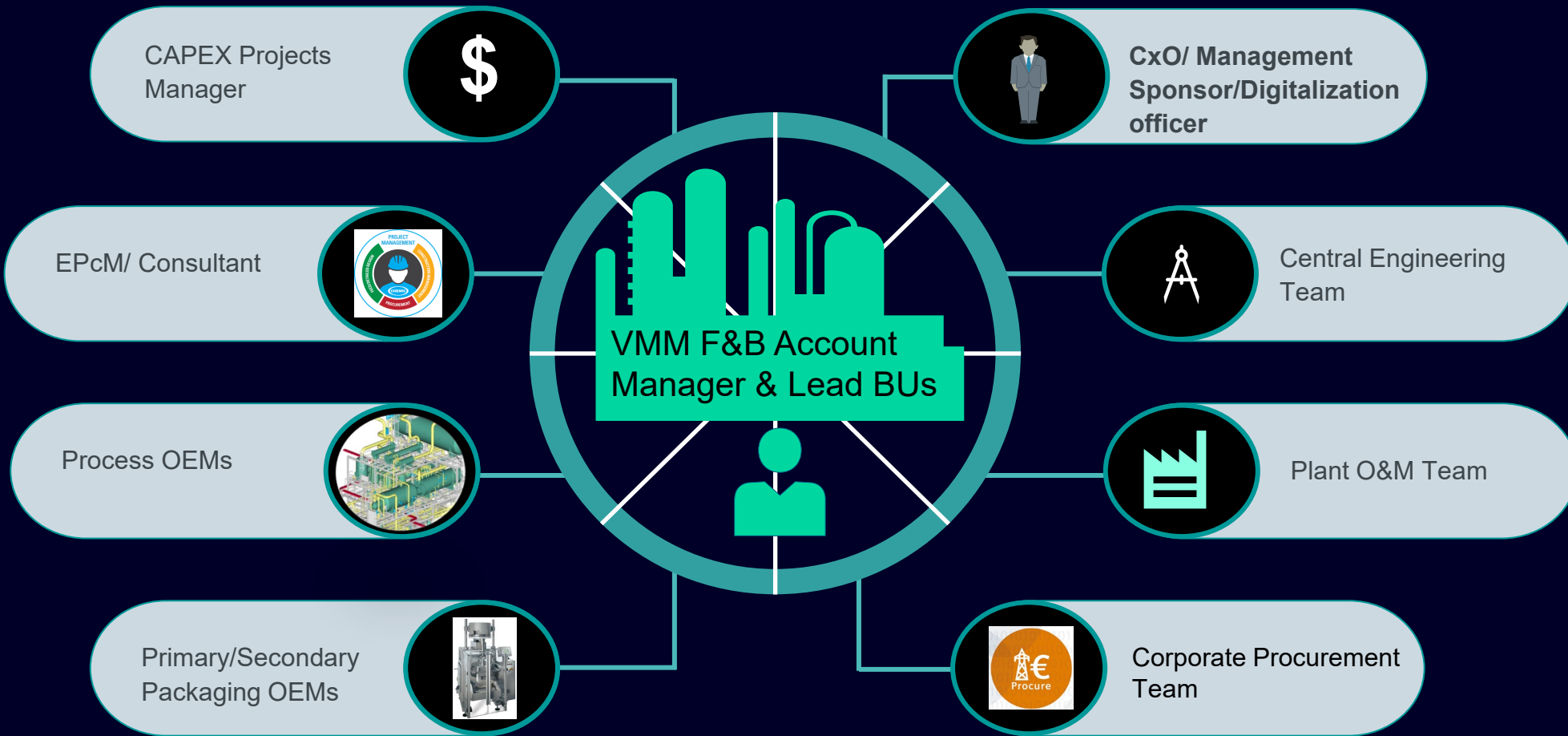


Vertical Approach to the Market

Food and Beverage / CPG



Typical Representation for a Greenfield / End customer



Siemens Portfolio from Shop floor to Top floor

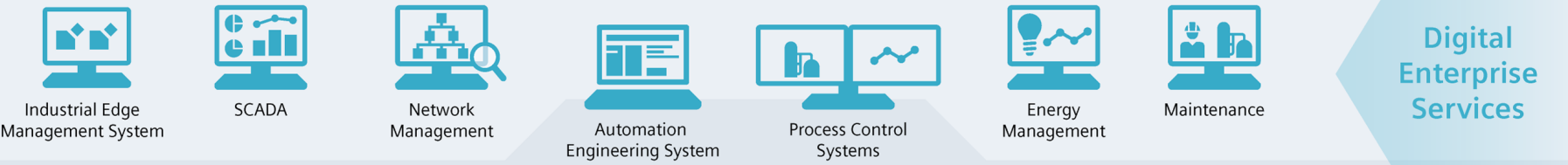
Cloud



Management



Operation

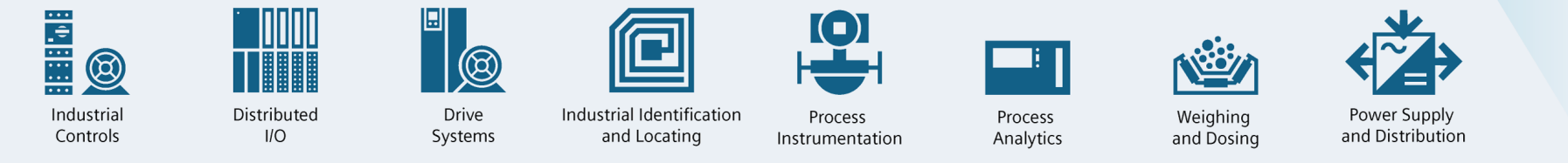


Control

◆ Edge-enabled devices



Field



Digital Enterprise Services



Integrate Engineering



Industrial Communication



Industrial Security



Safety Integrated



Data Intelligence

Vertical Structure (Our People)

Vertical Management Food & Beverage

Organizational Chart

DI FA F&B

Zhanna Shalygina
Head of VM F&B



Kathrin Hahm
Secretary



Account Development F&B
Harald Reiß



Operations Management
Juliette Barger



Technical Account Management
Roland Heymann



Technology & Concepts
Jens Fuchs



André Kucharski
Business Administration



Rifki Winanto
MarCom F&B



Volker Schleicher
Controlling / Reporting



SVM Food & Beverage - a winning team with decision power for global impact

Siemens Vertical Market (SVM)

DI FA R. Brehm ¹	SVM Manager Z. Shalygina	DI FA FIN T. Lerch	DI SW T. Hemmelgarn	SI EP T. Brenner	DI CS M. Wallisch	DI MC A. Peltz	Siemens Advanta J. Grabenhofer
	SVM Coach S. Neubauer	DI FA S. Gierse	DI PA A. Lorenz	SI RSS C. Liesener	SI EA A. Sukhtankar		

Siemens Vertical Market Experts (SVME)

SVM Manager Z. Shalygina	SVM OM² J. Barger	SVM FIN A. Kucharski	DI SW M. Vollbracht F. Nisi	SI EP M. Nechi C. Friedl	DI CS U. Sturm	DI MC A. Stukenkemper D. Dubber, Lu Bai Chen	Siemens Advanta J. Grabenhofer
F&B MarCom R. Winanto	DI CS DE&DS D. Picciotto	DI FA (PMA) H. Schürmann	DI PA D. Schmidt-Regge	SI RSS M. Arrigoni	SI EA S. Matzat		

Corporate Account Managers (CAM) – Global Account Managers (GAM)

 H. Ruff	 A. Pepa	 P. Veldkamp	 A. Ali	 M. Jackson
 R. Fey	 A. Harris	 U. Börner	 M. Rüttiger	 H. Ruff
 C. Xie	 F. Jeanparis	 E. Brütsch	 A. Thulin	 T. Sabbadin
 J. Gavin	 G. Santandrea	 S. MacKillop	 O. Plante	 M. Tran
 A. Harris (CAM) / M. Schmitz (GAM)		 Act. C. Xie	 Act. N. Duan	

blue: changes

1 Lead BU CEO | 2 Operations Manager

SVM Food & Beverage

a winning team with decision power for global impact

 Steve MacKillop  CAM	 Giorgio Santandrea  CAM	 Ali Ali  CAM	 Robert Fey  CAM	 Matthias Rüttiger  GAM
 Eric Brütisch  CAM	 Adam Harris  CAM	 Mark Jackson  CAM	 Henrik Ruff  CAM	 Henrik Ruff  CAM
 Olaf Plante  CAM	 Adam Harris CAM  R.-M. Schmitz GAM 	 Frederic Jeanparis  CAM	 Patrick Veldkamp  GAM	 Thiago Sabbadin  CAM
 Anders Thulin  CAM	 Uwe Börner  CAM	 Alessandro Pepa  GAM	 James Gavin  CAM	 Martin Tran  CAM
 Xie, Hai Zhen (Carina)  GAM	 Act. Xie, Hai Zhen (Carina)  GAM	 Act. Na Duan  CAM		

blue: changes

VM Food & Beverage – Global impact through aligned focus with regional execution

>23

Regional F&B Organizations in DI FA

>120

100% F&B Colleagues in VM and SVM

>300

Focus Accounts

>500

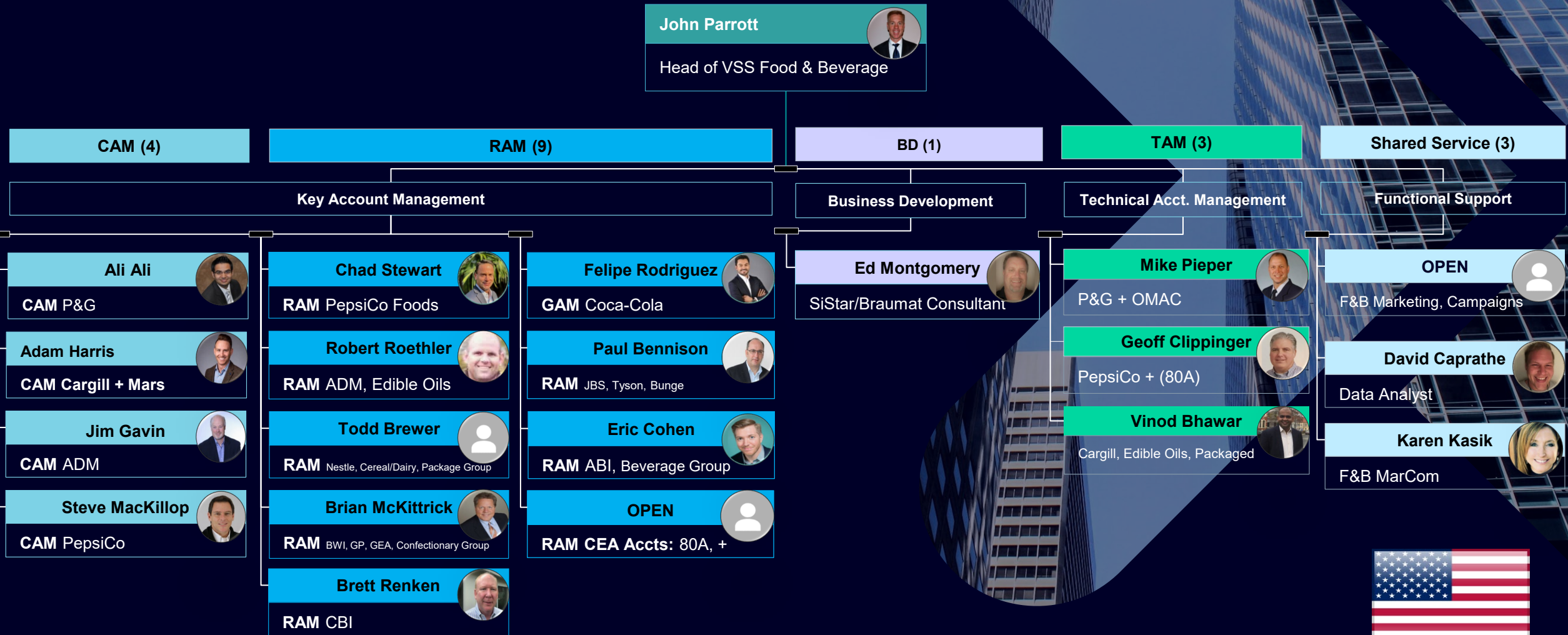
Global F&B Community Members



 Javier Perez LCB Argentina	 N.N LCB ASEAN	 Milan Bawa Australia/New Zealand
 Diego Cadete Brazil	 Deven Nainaar Canada	 Li Shi Guang China
 Act. Ganesh Gawada India	 Riccardo Borsatti Italy	 YoonJeong Yeom Korea
 Soeren Johansen LCB NORDIC	 John Parrott USA	 Terence Kieck LCB South Africa
 Ragip Emrah Atalan Turkey	 Parvez Pinjari LCB UAE	 Keith Thornhill Great Britain / Ireland
 Rainer Danereder LCB Austria	 Stein Monserez Belgium	 Manuel Cadenas Spain
 Sebastien Peynet France	 Carsten Voss Germany	 Jeff Chang Taiwan
 Hebert Rojas LCB Mexico	 Jeroen Vellinga Netherlands	

VM Country Overview – USA

Local VM and VS Set up



Food and Beverage Subsegmentation

The Market subsegments

A Focused approach to Food & Beverage

Bakery & Confectionary



Brewery



CPG



Dairy & Juice



Grains & Edible Oils



Sugar & Distillery



Soft Drink



Controlled Environment Agriculture & Aquaculture



Subsegment breakdown

Bakery & Confectionary

- Biscuits
- Bakery Products
- Chocolate
- Potato chips
- Finger Snacks
- Noodle
- Ketchup



Soft drink & Juice

- Carbonated
- Non Carbonated
- Mineral
- Tea



CPG

- Personal Care
- Home Care
- Hair Care
- Baby Care



Brewery

- Beer
- Alcoholic Drinks



Controlled Environment Agriculture

- Vertical farming
- Hydroponics
- Aeroponics



Dairy

- Liquid Milk Powder
- Skimmed Milk Powder
- Flavored Milk
- Whey Powder
- Cheese



Sugar & Distillery

- Sugar
- Distillery
 - Rectified Spirit
 - Extra Neutral Alcohol
 - Ethanol
- Co-gen



Edible Oils

- Edible Oil Refinery
- Solvent extraction plant



Grains

- Rice
- Grains and Pulses
- Flour Mill
- Starch
- Spices



Live Stock & Aquaculture

- Fish farming
- Fish feed
- Meat & Poultry



Food and Beverage Centers of Competence

And our Centers of Competence (CoC) ...in regions to support global community

CoC Livestock



- Develop solutions for meat processing market
- Develop EndCustomers, JBS, CBF
- Develop OEM's
- Drive digitalization topics such as traceability



Contact:

Marcelo Suzuki
siemens.com/livestock



CoC Controlled Environm. Farming



- Gain global market transparency
- Development of holistic technical concepts
- Addressed sub segments:
Control systems with connection to Lighting, Climate control, Irrigation systems



Contact:

Freek Marks



CoC Edible Oils



- Enter largest palm oil producers & influencers
- Install Demo Room for edible oil
- Train partners



Contact:

Alexander Grimm



CoC Aqua Culture



- Develop solutions for onshore & offshore aquaculture market
- Develop EndCustomers & OEM's
- Practical examples of how electrification, automation and digitalization support aquaculture



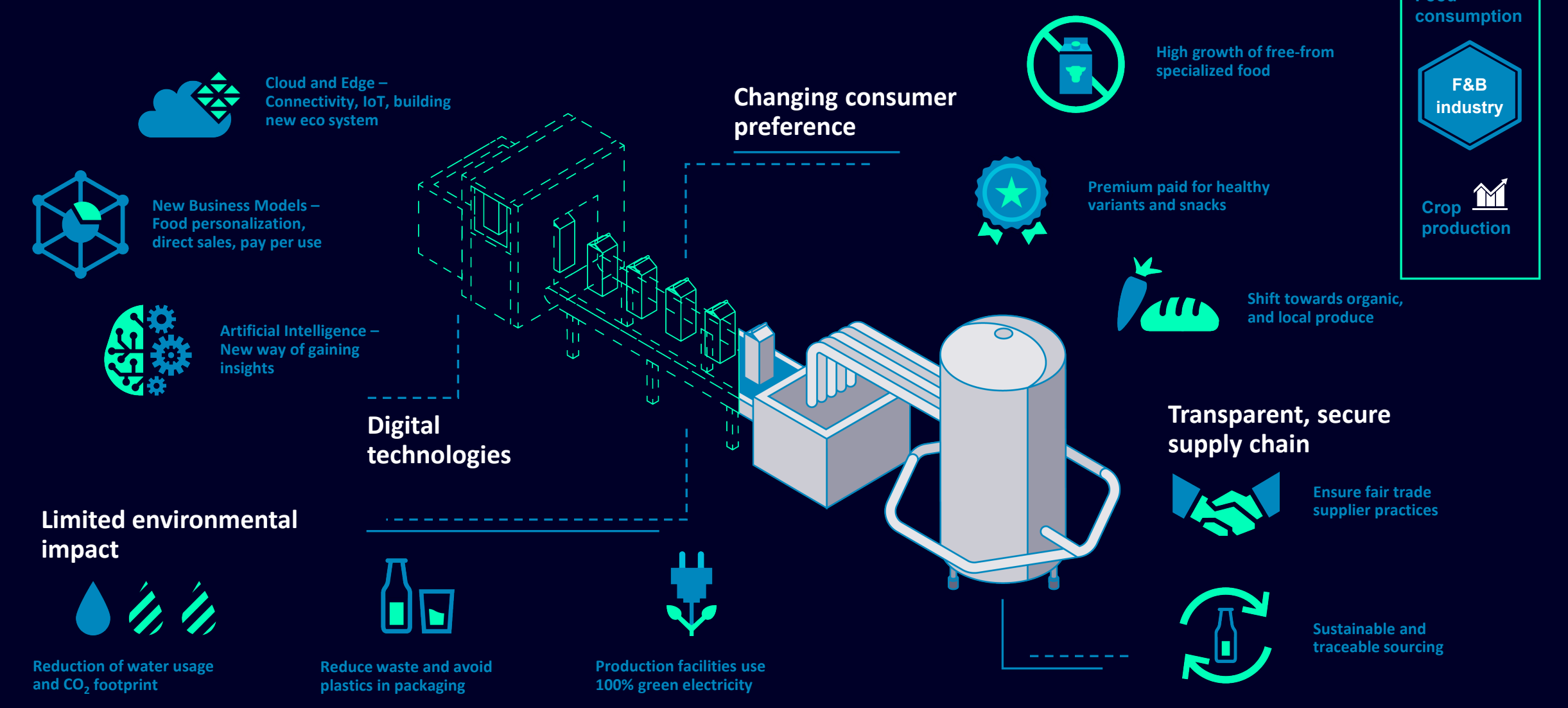
Contact:

Torill Oestingsen
siemens.com/aquaculture



Food and Beverage Trends and Impact

Trends with high impact on Food & Beverage industry



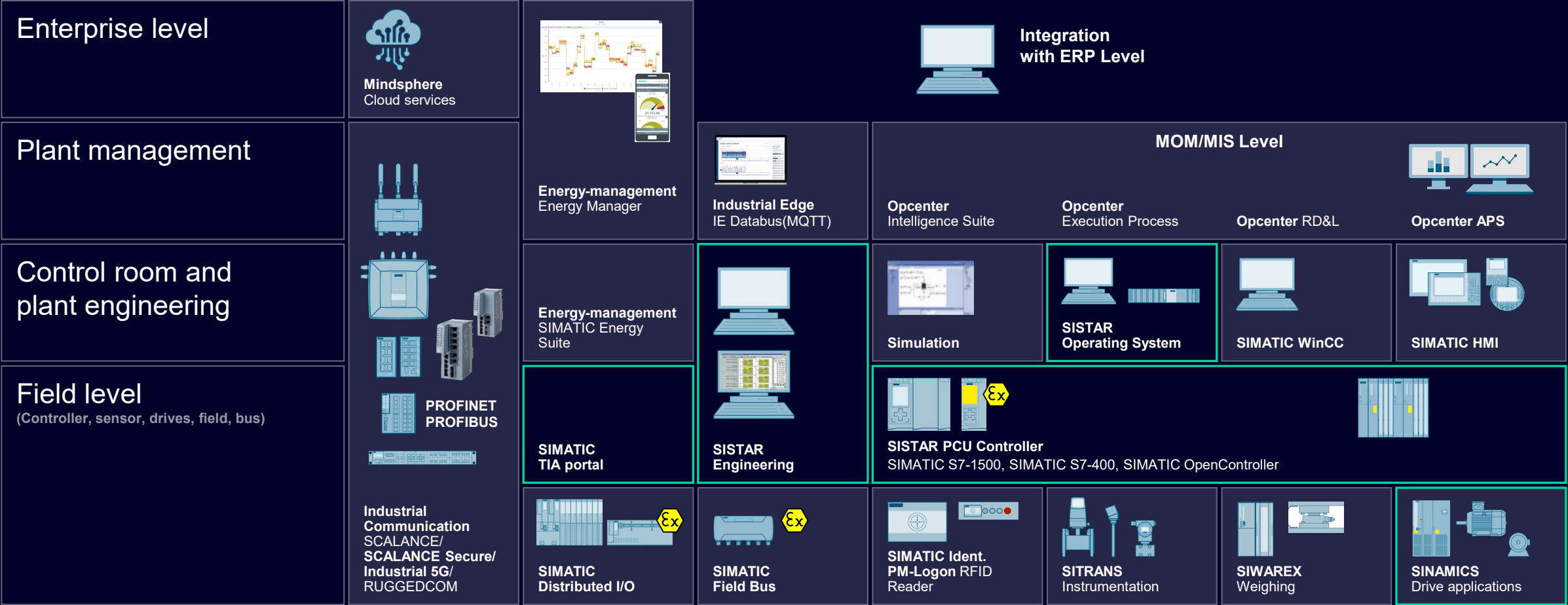
Food and Beverage Solutions Examples



SISTAR®

Process Control System for Food & Beverage processing

SISTAR® - Siemens comprehensive portfolio around batch processing



SIEMENS

SISTAR® — the perfect mix.

The simply scalable
Processes automation system



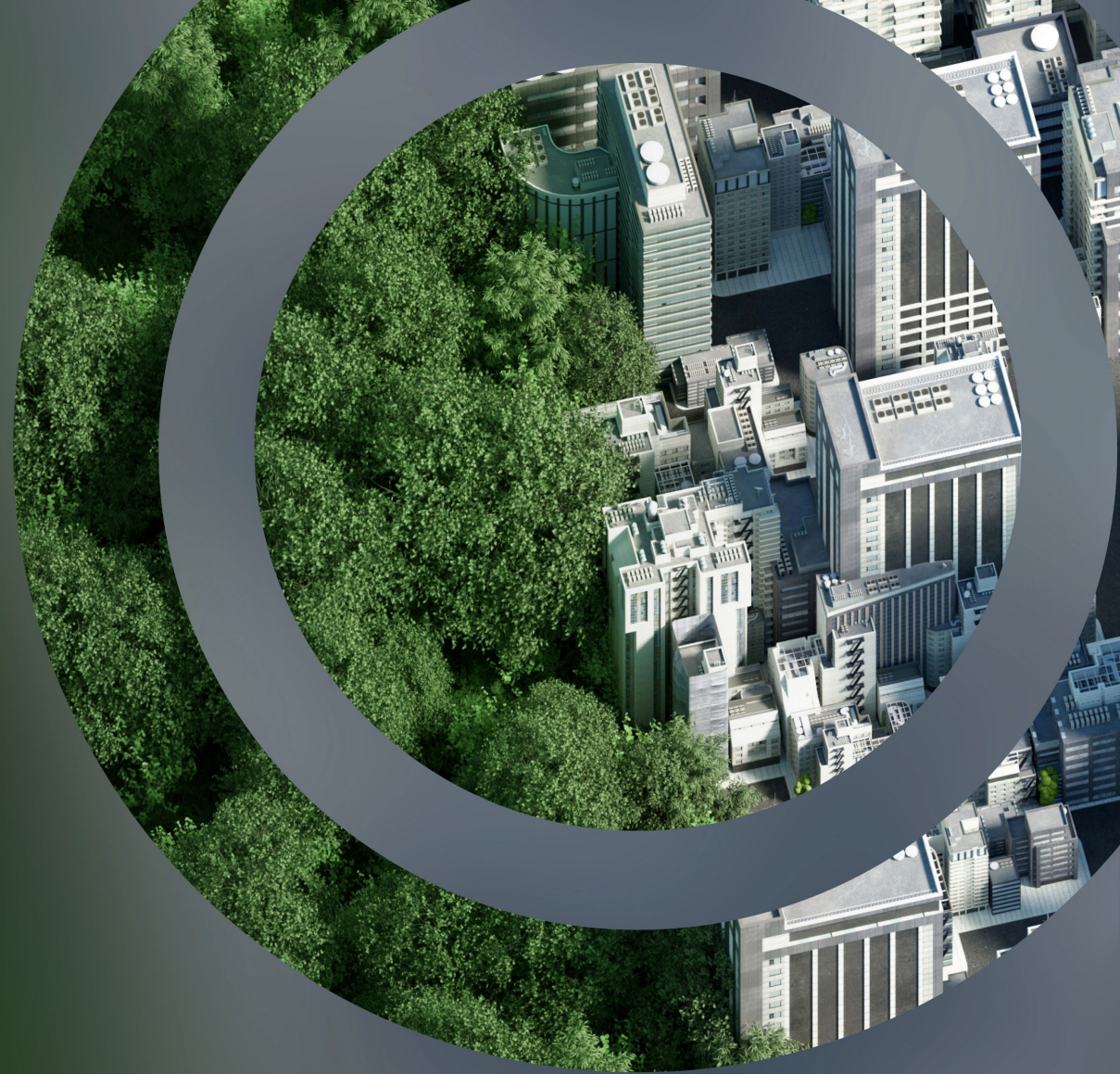
BRAUMAT

Create great beer.



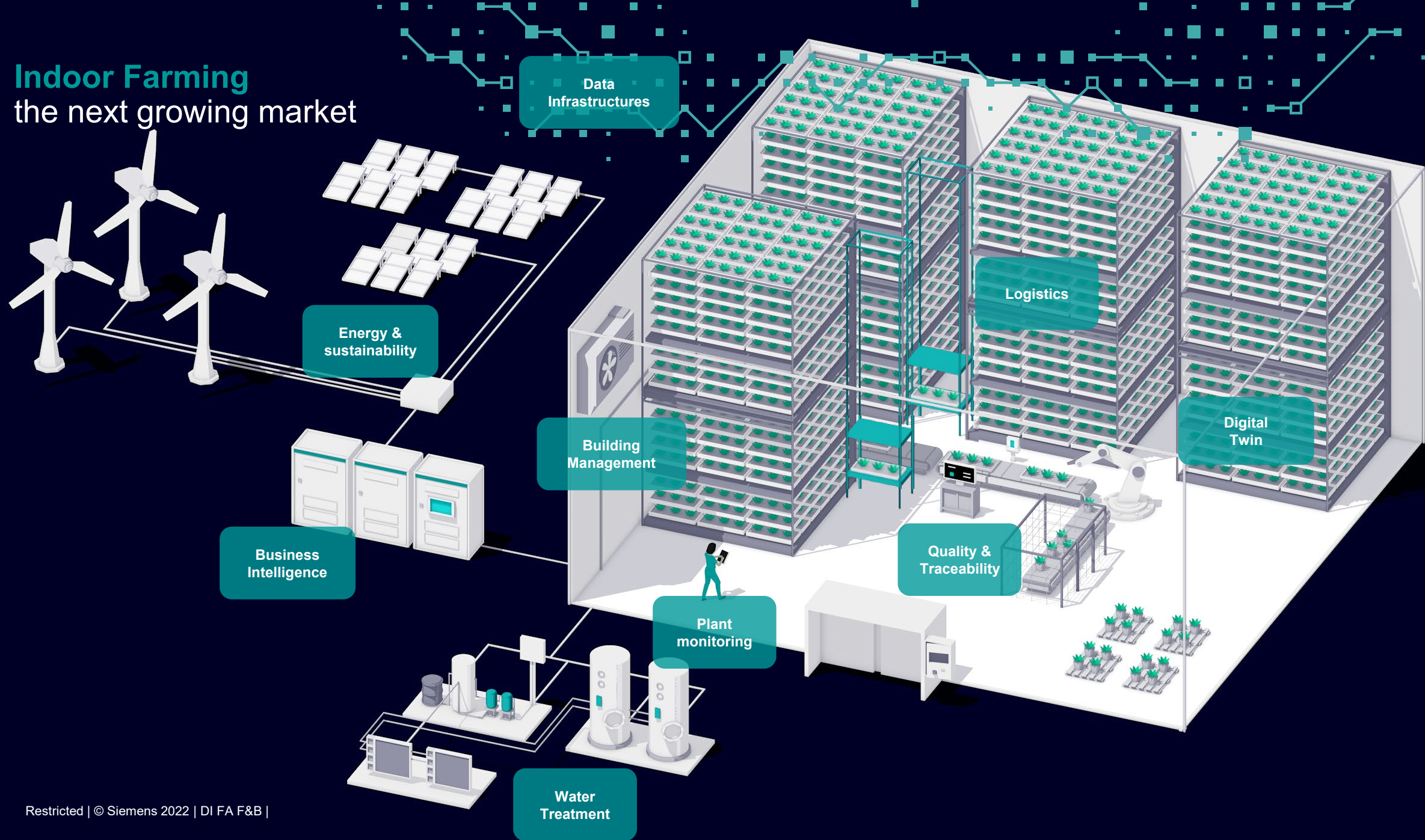
A value proposition to CEA

Global Center of Competence
Controlled Environment Agriculture



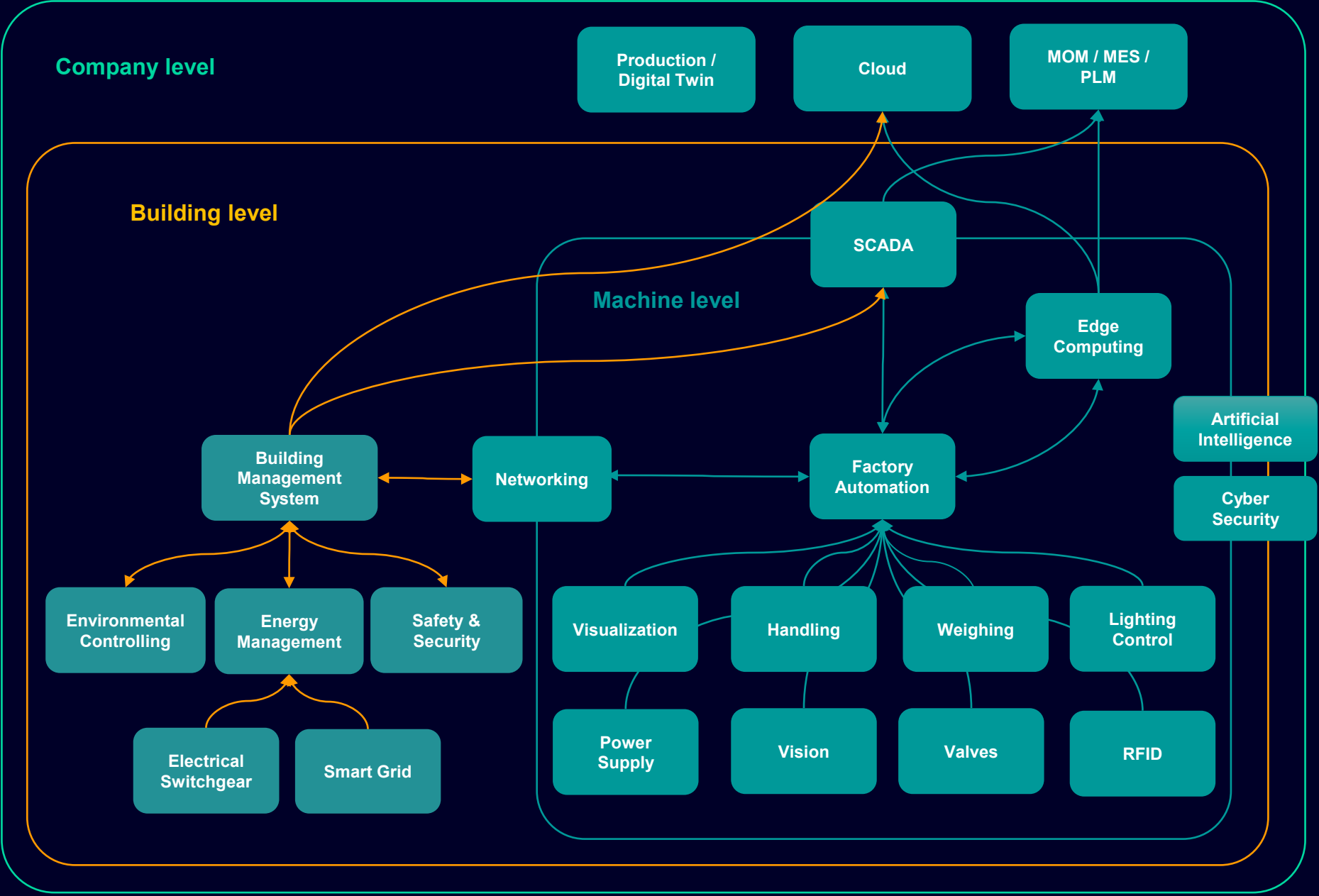
Indoor Farming

the next growing market



We can provide
the full package

From machine level
to company level



From Sensor to edge to cloud

Siemens industrial IoT



Low-Code platform

Build apps faster for cloud, on-premise or hybrid infrastructure

IIoT as a service

Centralized compute & storage, with solutions, apps & services

Edge Computing

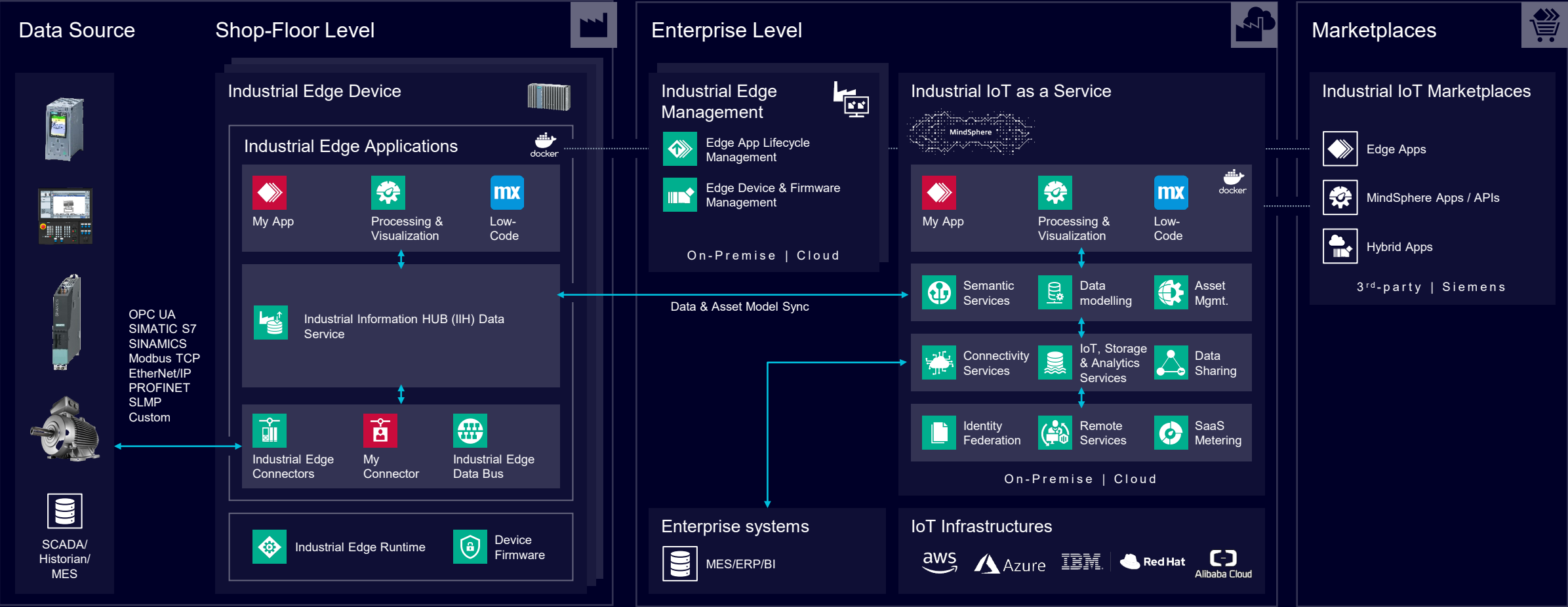
Decentral computing & storage with device runtime, apps & management

Connected Things

Sense, act, control and connectivity

Siemens industrial IoT

Our open technology stack from edge to cloud



SI portfolio to address challenges within campus and building infrastructure for Food & Beverage and CPG

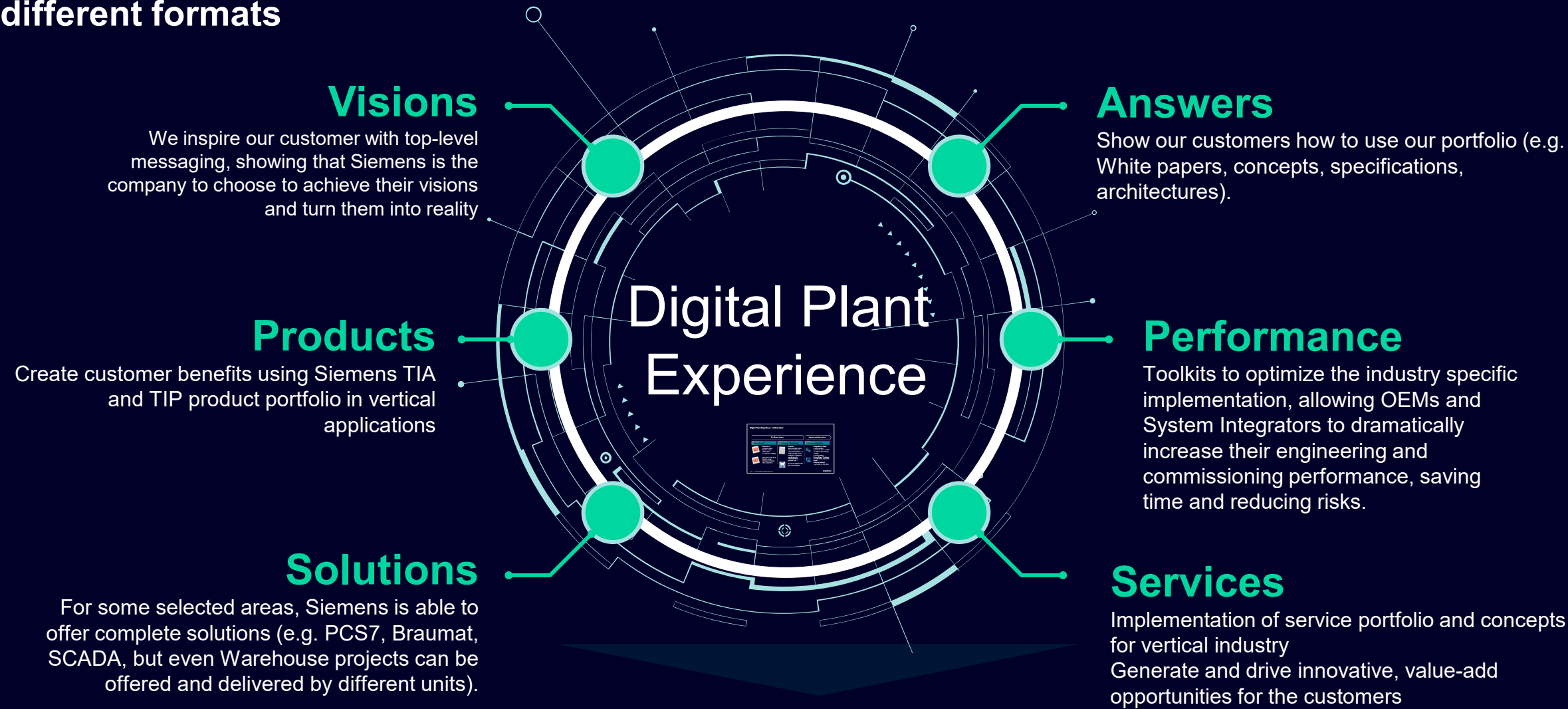
Products, systems and solutions for Food & Beverage & CPG from Siemens Smart Infrastructure

Scope of supply for “Smart Dairy Campus”	Power grid in-feed	Medium Voltage Distribution	Low Voltage Distribution	Comfort	Fire Safety	Security and Access	Critical Environment
							
	Benefits						
	• Grid access • Renewable access • CAPEX/OPEX	• Security of supply • eMobility	• Safety • Flexibility • Protection and control	• Control • OPEX • Business performance	• Safety • Business continuity	• Staff productivity • Business resilience	• Safety • Comfort • Compliance
	Portfolio examples						
	• HV/MV-Transformer substation • E-houses • Substation automation • Renewable integration (DES/EPS)	• MV/LV-Transformer substation • MV Switchgear • Protection relays • Battery storage • Microgrid controller • eVehicle charging infrastructure	• LV Switchgear • Busbar trunking systems • Molded case/miniature circuit breakers • Motor control centers/soft starters • Control cabinets • Storage • Meters	• Controllers • Actuators • Valves • Lighting • Sensors	• Detection • Notification • Extinguishing	• Access management incl. perimeter protection • Video surveillance • Intrusion detection • Evacuation	• Application libraries (HVAC & Room Automation) • Compliance concepts • Compliance with hygiene regulations

Power
 Building
 Dairy specific



Digital Plant Experience - Addresses the challenges of F&B customers in different formats



Food & Beverage Sales
F&B Technical Account Manager
F&B System Integrator / Partner

Our Value Proposition

“Why Siemens”

**Cutting-edge technologies
enabling autonomous manufacturing**

**Additive
Manufacturing**

**Artificial
Intelligence**

**Autonomous
Systems**

**Cognitive
Engineering**

Industrial 5G

**Augmented
and Virtual Reality**

**Cloud
Technologies**

**Blockchain
Technology**

**IoT and Industrial
Edge Computing**

“Give More than you Take!”

**Merging the virtual and the physical world –
infinite opportunities from infinite data**

Virtual

Physical

Companies must master their digital transformation according to their individual needs

Consulting

Making sure company's path to the digital transformation is the right one

Implementation

Helping customers implement and optimize the Digital Enterprise

Optimization

Continuous improvement by analyzing ongoing operations

Financing

Supporting companies with smart financing solutions

I Thank you

Published by Siemens Digital Industries

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“Give More than you Take!”