END-TO-END ENERGY INTELLIGENCE

CLOSING THE EFFICIENCY EXECUTION GAP

DELIVERING ON ENERGY EFFICIENCY

Energy efficiency has shifted from a technical challenge to a leadership one. For businesses, it now underpins profitability, resilience, compliance and long-term competitiveness. Yet while ambition is widespread, execution remains uneven.

This report, developed in partnership with Sapio Research, draws on a global survey of 2,700 senior decision makers across 15 industries, including 200 in Australia, to understand how companies are translating intent into action – and where progress is stalling. Energy still absorbs roughly a quarter of operating budgets. And for about 60 percent of companies, rising costs now directly threaten profitability. In response, investment is now mainstream: 63 percent have already invested in efficiency, with another 29 percent planning to do so within 12 months. Digital tools are also rapidly entering the core, with over two thirds of respondents saying they are already using them or ready to deploy – and those that combine performance diagnostics, targeted modernisation, and continuous optimisation are already pulling ahead.

Despite this momentum, results are fragmented. Ownership of efficiency initiatives is spread across functions, data is often siloed or inaccessible – affecting over half of organisations – and financial decisions continue to favor short termism over long-term value, even though 81 percent believe total cost of ownership should guide investments.

For executives, the message is clear: the challenge is no longer why energy efficiency matters, but how to execute it consistently and at scale.

This report examines what separates experimentation from sustained performance – and what it takes to close the gap between ambition and results.

Erich Labuda, President, Motion Services division, ABB

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THE COST VS PROFIT PARADOX

Reframing energy efficiency from crisis response to a core lever for financial resilience and risk management

Still one quarter of every operating dollar goes to energy

For most industrial players, energy accounts for an average **25.4 percent** of operating costs – an uncomfortable truth that has barely shifted since 2022. Four in ten respondents report energy consuming **21–30 percent** of total spend, with exposure even higher in energy-intensive sectors such as refrigeration (55%), HVAC (47%) and metals (44%).

This stability, however, is misleading: companies are not seeing relief but are instead adapting to a “new normal” of persistent cost volatility.

Profitability under threat

Despite recent periods of calmer wholesale prices, three in five **(59%)** of respondents still view rising energy costs as a **moderate or major threat** to profitability (up from 53% in 2022)[1].

This aligns with the Energy Efficiency 2025 analysis from the IEA, which underscores that even where prices soften, systemic pressures – geopolitics, grid congestion, weather extremes, and fuel price fluctuations – continue to elevate cost risk and unpredictability.

In other words, the margin threat has simply changed shape rather than receded.

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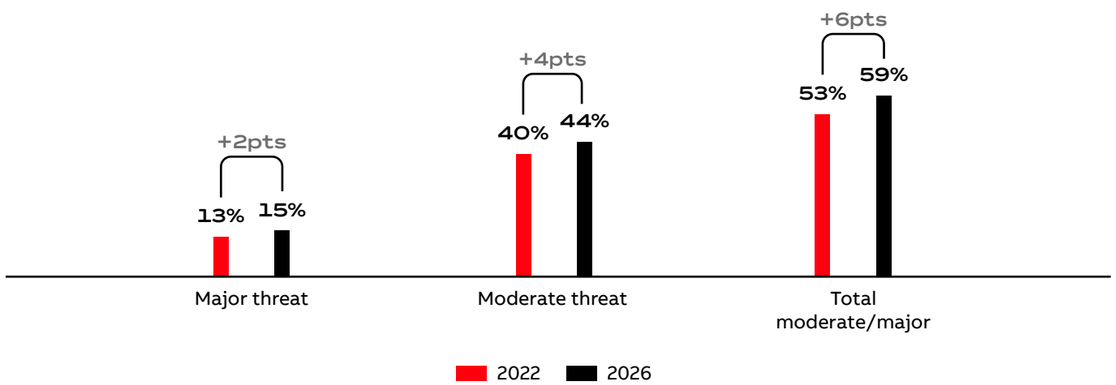
To what extent do rising energy costs threaten the profitability of your business?

INVESTMENT INTENT



1 Where comparisons are made with 2022 data, findings should be interpreted with caution and in context rather than as a strict longitudinal trend or direct comparison. While the core research design remains consistent, changes have been made to sample composition and question framing and wording, to reflect the evolving industrial and energy landscape between survey waves.

CASE STUDY

In the face of rising energy demand and intensifying climate urgency, leading companies are shifting from incremental savings to structural efficiency improvements in core assets and systems. Aurubis, Europe’s leading copper producer, is saving 25 GWh of electricity every year after deploying high-efficiency ABB motors and drives, directly reducing energy exposure in one of its most power-intensive operations.

India, Mexico: Threat perception peaks despite divergent cost levels

India (72%) and Mexico (70%) report the highest profitability threat from rising energy costs – 10-12 points above the global 60 percent average. India pairs this with the second-highest cost burden (28% of operating expenses) and 22 percent calling it a "major" threat (vs 15% globally). Mexico's 70 percent threat perception exceeds its cost share (24.9%, below average), pointing to acute sensitivity to price volatility. Both markets show limited confidence in near-term price stability, driving sustained efficiency urgency despite divergent starting points.

Saudi Arabia: High energy costs, lowest threat perception

Saudi Arabia is a striking anomaly. Energy accounts for 28.6 percent of operating costs – third-highest globally and well above the 25.4 percent average. Yet only 50 percent view rising costs as a moderate or major threat, the second lowest of any market surveyed after Sweden at 48 percent. Just 4 percent call it a "major" threat (vs 15% globally). This disconnect likely reflects state energy subsidies, price stability mechanisms tied to domestic production, and confidence in long-term supply security.

Efficiency as risk management, not crisis response

The data shows a serious shift in how companies interpret the role of energy efficiency. What was once a reaction to price spikes has evolved into an essential tool for margin protection and operational resilience. The WEF’s Effective Energy Transition 2025 report echoes this shift, noting that companies with strong efficiency measures demonstrate higher competitiveness during periods of energy system stress.

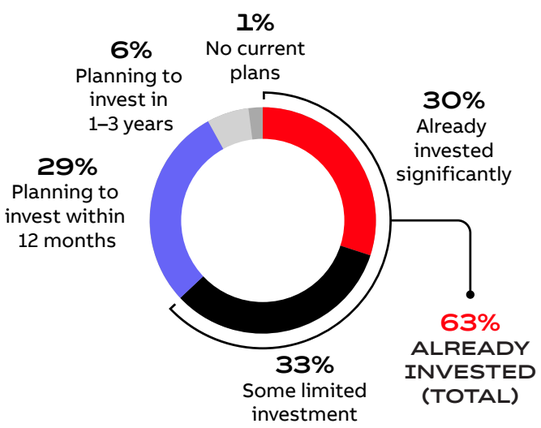
GOOD INTENTIONS BACKED BY ACTION

How priorities are evolving under tighter capital and risk scrutiny

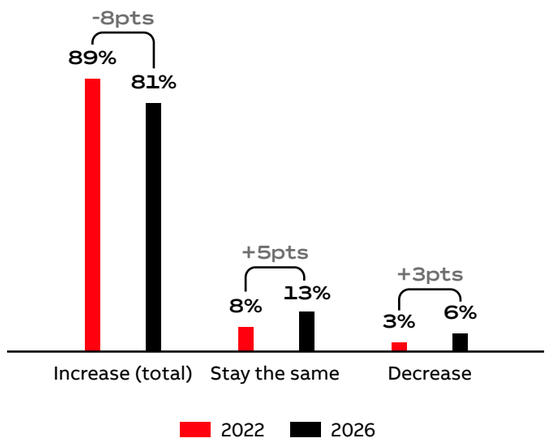
Investment in energy efficiency has moved firmly into the mainstream: **63 percent** of companies have already invested, and a further **29 percent** plan to do so within the next 12 months, leaving virtually no industrial players without budget allocated to efficiency. The "why" is no longer debated – only **1 percent** report no current plans, down from 3 percent in 2022.

Have you already invested, or are you planning to invest, in measures to make your energy usage more efficient?

INVESTMENT STATUS



INVESTMENT INTENT



The shift from intent to implementation is clear. Energy efficiency is now embedded in capital planning and operations budgets across large organisations.

However, expectations for future investment growth have softened. While a clear majority (81%) still anticipate increasing spending over the next five years, this is down from nearly nine in ten in 2022. The shift signals a more cautious planning in a context shaped by supply-chain uncertainty, inflation, and ongoing geopolitical volatility.

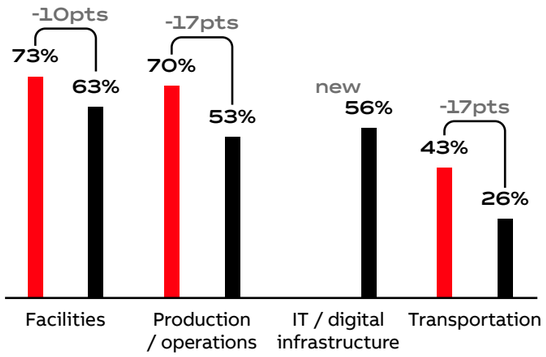
The IEA notes a similar pattern, showing that although efficiency remains one of the most cost-effective levers for reducing demand and strengthening energy security, **investment growth has not yet reached the levels required to meet global climate and competitiveness goals**.

CLOSING THE EFFICIENCY EXECUTION GAP

A shift in where industry is choosing to invest

Have you already invested, or are you planning to invest, in measures to make your energy usage more efficient?

AREA OF FOCUS



Compared to 2022, investment focus has moved away from large-scale production interventions. The data could imply a move toward IT and digital infrastructure, however this option was not available in the 2022 survey so it is impossible to say with certainty. Regardless, in 2026 it attracts 56 percent – higher than production/operations, which declined by 17 percent points.

While many organisations believe they have already captured the more attainable gains on the shop floor, the IEA's Energy Efficiency 2025 contradicts this perception: globally, less than 25 percent of motors operate with variable speed drives, leaving motor-driven systems among the largest untapped sources of industrial efficiency. In other words, perceived saturation does not match technical reality.

A landscape defined by pragmatism, not retreat

The moderation in expected future investment does not signal a loss of interest. Rather, it illustrates a transition from urgency to strategy – underpinned by capital discipline, confidence in low-disruption measures, and a growing emphasis on digital capability. The "permacrisis" conditions of recent years – high volatility, political fragmentation, price shocks – have pushed organisations to make efficiency budgeting more systematic and less reactive.

The challenge now is not whether to invest, but how deeply and coherently companies will invest to unlock sustained value. The easiest gains are giving way to more complex, cross-functional improvements, that require new skills, new data, and new decision-making structures.

56%
of 2026 investment goes to IT & digital infrastructure

17%
decline in production/operations investment since 2022

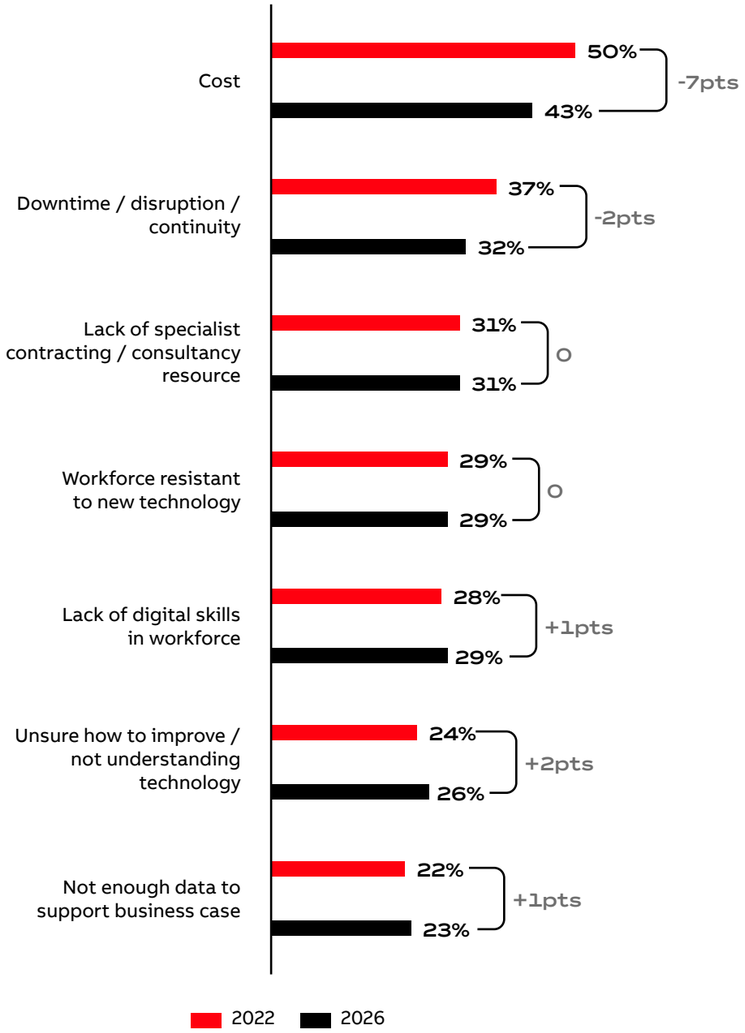
<25%
of motors operate with variable speed drives, leaving motor-driven systems among the largest untapped sources of industrial efficiency worldwide

NEW BLOCKERS

Why execution gaps now outweigh cost as the primary constraint

Cost is no longer the single obstacle
Cost remains the most cited barrier to energy efficiency, but its influence is declining. In 2026, **43 percent** of respondents rank it among their top three constraints, down from 50 percent in 2022.

What are the biggest barriers preventing greater energy efficiency in your organisation? Select up to three



CLOSING THE EFFICIENCY EXECUTION GAP

Capability gaps are emerging as equally limiting energy efficiency improvements. Nearly a third **(31%)** cite a lack of specialist resources, while resistance to new technology and shortages in digital skills **(29%)** continue to slow progress. More than one in four **(26%)** admit they are unsure how to improve efficiency or how to evaluate available solutions. In short, the constraint has shifted from capital availability to **organisational readiness**.

As efficiency initiatives become more digital and interconnected, gaps in skills, data quality, and internal alignment now matter as much as budget.

The information gap has closed; the execution gap has opened
Organisations know efficiency matters and where to look for help. What they lack is internal capacity; people who can interpret data, drive change across siloed departments, and sustain momentum beyond pilot projects.

The next phase requires enabling, not evangelizing.

The 2026 data suggest that the industry has moved beyond the "why" and is now stuck in the "how." Organisations are looking for partners who can **remove execution friction** – simpler tools, better financing structures, clearer Return On Investment (ROI) models, and cross-functional support that helps businesses act on what they already know.

Europe: Cost concerns moderate, execution gaps persist
Some European markets show cost pressure easing relative to global patterns. In Italy, only 39 percent cite cost as a barrier (vs 43% globally); in Germany, 44 percent is close to the global average despite higher energy prices. Instead, capability challenges dominate: 30 percent in Germany point to unclear technology paths, while UK respondents cite disruption fears (39%) and specialist resource gaps (36%) above global norms. The pattern suggests European firms have absorbed price volatility but now face organisational and knowledge barriers to deeper progress.

Middle East and Asia-Pacific: Skills shortage constrains ambition
Workforce capability emerges as the defining barrier across Asia-Pacific markets.
In Saudi Arabia, 46 percent cite lack of digital skills – 17 points above the global average. India shows a similar pattern, with four in ten (41%) pointing to skills gaps and a similar number (42%) to workforce resistance and specialist resource shortages. Indonesia reports the highest data barriers globally (35%), compounding execution challenges. Cost, by contrast, matters less: Indonesia and Saudi Arabia (both 34%), echoed by just over a third in India (36%), cite it as a top barrier, versus 43 percent globally. The implication: investment ambition is high, but internal capability lags infrastructure needs.

HOW INDUSTRY IS TAKING ACTION

Why progress today is real, but rarely systematic

Broad engagement, uneven depth
When asked which steps they have already taken to improve energy efficiency, respondents report activity across almost every category, but at surprisingly similar levels – a very different picture from 2022, pointing to breadth rather than depth.

A diversified but fragmented set of actions
Companies report action across training and awareness initiatives (41%), more efficient production processes (41%), LED or lighting upgrades (40%), audits or appraisals (40%), digital monitoring or automation (36%), electrification (32%), upgrades to motors or drives (30%), and renewables (39%).

While positive, this flat distribution signals **fragmentation** rather than progression or prioritisation. This is the essence of the **execution gap**: high activity, modest transformation.

Why action is broad but shallow
Several factors explain the pattern. First, **efficiency is now a cross-enterprise agenda**, spread across functions, often without central coordination. Second, **companies are balancing disruption risk with quick wins – particularly at building level**. Measures with minimal operational impact (i.e. lighting, HVAC) continue to dominate. Third, **inconsistent definitions blur decision-making**.

For instance, energy audits (on-site, measurement-based assessments) and energy appraisals (remote, data-driven evaluations) are distinct methodologies, each suited to different stages of the efficiency journey. Yet understanding of the difference remains inconsistent in our survey – 52 percent recognize a significant distinction, but 47 percent see only a minor difference or none at all.

Audit and appraisal adoption rates are also very similar – 85 percent versus 83 percent – strengthening the perception that a fair number of businesses aren't making a sharp distinction between the two, or are using the same label for what might actually be different kinds of activity. Finally, **a widespread belief persists that early measures have already captured meaningful gains** – despite evidence to the opposite, as shown by IEA.

Businesses are moving from experimentation toward structure
Taken together, these findings depict industry players who have moved beyond awareness and into action – but who remain in **experimental mode**. Companies are testing many things at once, while missing the foundations of scale: a coordinated roadmap, clear governance, harmonized definitions, and a long-term, cross-functional execution model

This aligns with the IEA's World Energy Outlook 2025: early improvements tend to come from visible, low-disruption measures, while deeper savings require systematic diagnostics, data integration, and multi-year planning.

Progress is real – transformation is still ahead
The flattening of action points to a need for **structured efficiency roadmaps –** not one-off interventions.

This is where service providers, consultants and solution partners can add the most value: not by selling individual products, but by helping organisations **sequence, prioritise and integrate** their efficiency journeys.

CASE STUDY

Few companies are sequencing measures into a coherent efficiency journey. One exception is a German sewage plant that cut energy use by 40 percent and began supplying renewable electricity back to the local power grid. The transformation was driven by the adoption of ABB's highly efficient SynRM motors paired with variable speed drives (VSDs), demonstrating the impact of targeting core motor-driven systems rather than isolated initiatives.

EFFICIENCY AS BUSINESS RESILIENCE

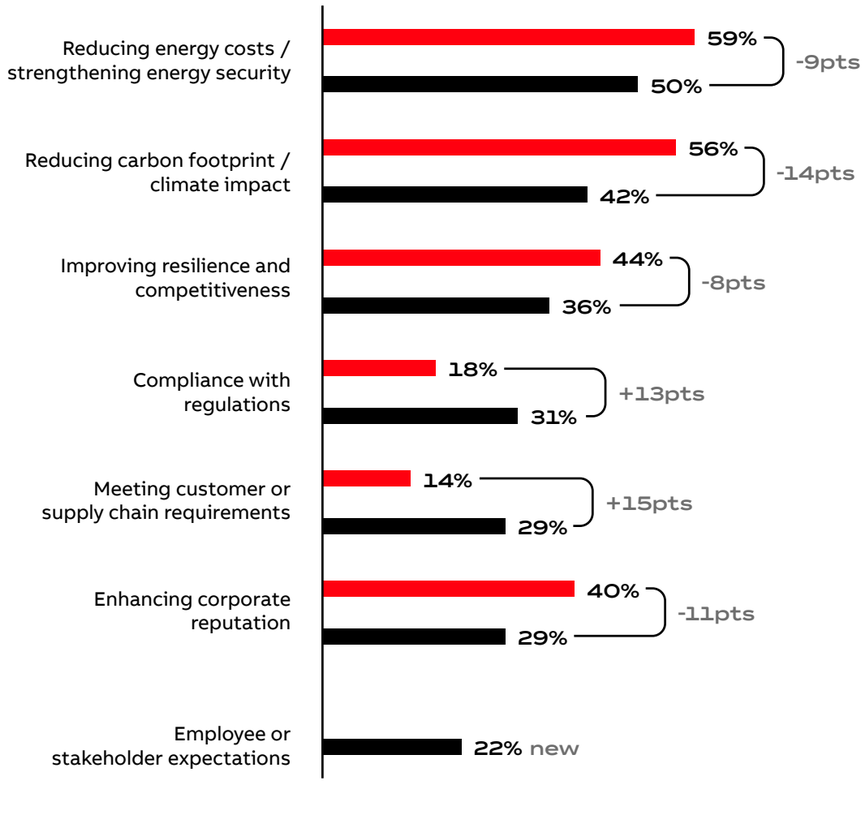
How efficiency has shifted from advantage to operational necessity

A shift in what matters most
When reporting on the major reasons for investing in energy efficiency, **cost and energy security** remain the top drivers **(50%)**. What has changed is why companies pursue efficiency.

Compared with 2022, fewer companies frame it around **carbon reduction** (down from 56% to 42%) or **competitiveness** (44% to 36%). Rather than signaling declining ambition, this shift suggests that efficiency is no longer seen as a differentiator – it has become a **condition of market access**.

For your organisation, what are the most important reasons for investing in energy efficiency?

DRIVERS TO INVEST IN ENERGY EFFICIENCY



CLOSING THE EFFICIENCY EXECUTION GAP

Regulatory and supply-chain pressure accelerating
Two drivers have grown sharply since 2022:

18% to 31%
Regulatory compliance

14% to 29%
Customer and supply-chain requirements

This mirrors the WEF's Effective Energy Transition 2025 report, which notes that regulatory tightening and value-chain expectations are now among the most powerful forces shaping industrial energy decisions.

Reputation faded – because expectations have normalised
The decline in respondents citing **corporate reputation** (40% to 29%) reflects a maturing landscape: efficiency is now expected. Stakeholders look for proof of action rather than statements of intent, and the reputational risk lies more in falling behind than in taking the lead.

A broader purpose: safeguarding continuity and compliance
The 2026 numbers point to a real change in how efficiency is talked about inside companies – less as a decarbonisation lever and more as **business risk management**.

This is not evidence of weakening commitment. It is evidence of **normalisation**. Efficiency now underpins **operational continuity, compliance readiness, supply-chain credibility, and long-term cost stability**. The carbon benefit is closer to being assumed, rather than being the headline.

In short, efficiency has moved from aspiration to infrastructure. The question for companies is no longer whether to pursue efficiency, but how to deliver it consistently and at scale.

Brazil, Malaysia: Cost pressure drives two-thirds of investment
Cost is naturally the most important factor in the fast-growing economies of Brazil and Malaysia, where over six in ten (63%) cite reducing energy costs as a top reason for investing – 13 points above the global average of 50 percent. Similarly, Singapore (59%) and Indonesia (57%) also show a higher sensitivity to cost than the global average. This contrasts sharply with Germany, where only 38 percent prioritise cost (-12 points globally) – the lowest of any market surveyed. The pattern could suggest that as energy infrastructure matures and prices stabilise, other drivers – compliance, resilience, operational continuity – begin to share the stage with pure cost economics.

Carbon as driver: US trails, Malaysia and UK lead
Carbon reduction as an investment driver varies widely – but not along expected development lines. Malaysia (53%), UK (49%), Indonesia (49%) and Brazil (48%) all prioritise carbon well above the 42 percent global average. The US, by contrast, shows the lowest carbon focus of any market at just 31 percent (-11 points), alongside Southern Europe (Italy 33%, Spain 34%). This suggests that climate motivation reflects political and cultural context more than economic development level – challenging assumptions about "rich country" climate leadership.

DATA WRANGLING

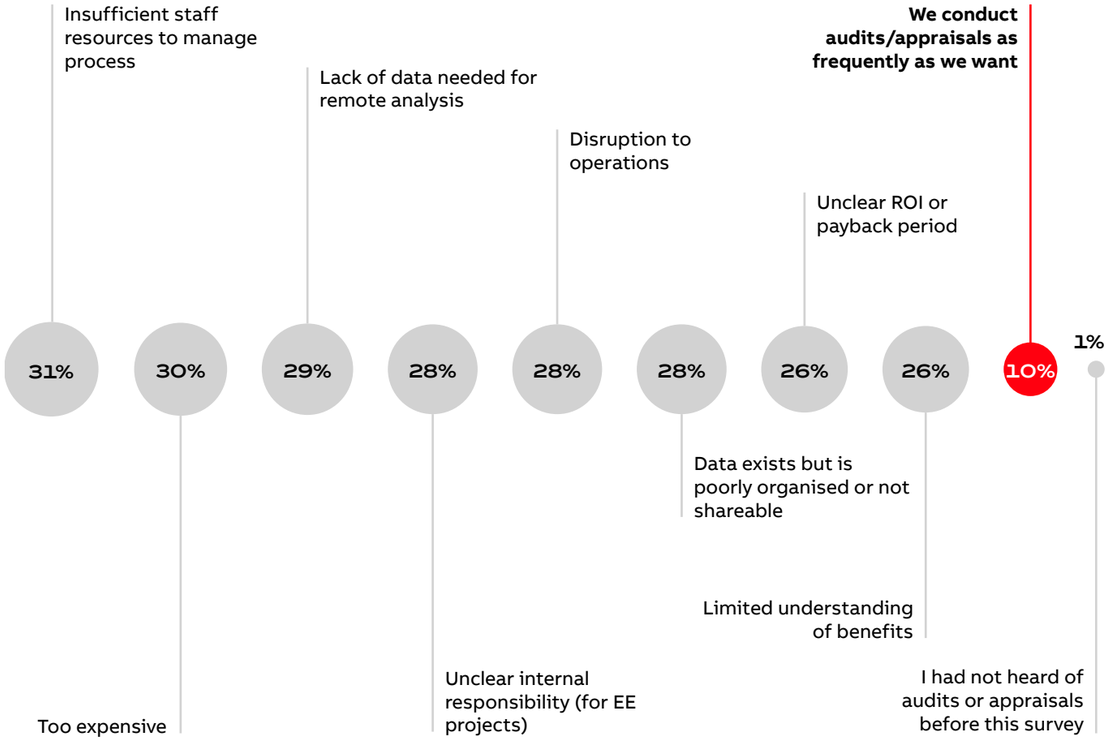
When data readiness, aggregation, cleaning and contextualisation define the pace of progress for execution

About three in ten cite missing data as appraisal barrier
Energy appraisals and audits may be routine, but data readiness is not.

About three in ten **(29%)** say they lack the data needed for remote analysis, and a similar portion **(28%)** say the data exists but is poorly organised or not shareable.

Combined, **over half** face some form of **data barrier** – absence, accessibility, or quality – slowing decision-making, undermining diagnostics, and weakening business cases for deeper action.

What are the main barriers to conducting audits / appraisals more frequently?

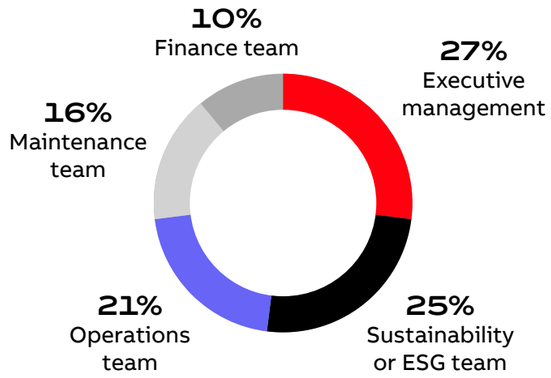


Fragmented systems, fragmented decisions
Most industrial sites generate energy data across multiple systems – building management systems, supervisory control and data acquisition (SCADA), Enterprise Resource Planning (ERP) environments, and sustainability reporting tools – often without a unified view. This fragmentation mirrors global findings: the WEF's Effective Energy Transition 2025 report names data interoperability as one of the key structural barriers preventing industries from scaling their efficiency and decarbonisation efforts.

As a result, teams struggle to pinpoint losses, validate savings, and prioritise investments – just to mention a few of the most common issues.

When asking who's in charge of energy appraisals and audits, findings show that responsibility for energy appraisals is spread across functions, with no clear owner. This lack of accountability creates bottlenecks: approvals stall, data stays siloed, and insights fail to translate into action.

Who in your organisation is primarily responsible for providing the data and approving energy-efficiency assessments?



The result: insight gaps slow execution
Weak data foundations prevent companies from moving beyond isolated improvements. Assessments occur less frequently than needed, opportunities cannot be qualified at scale, projects compete for capital without comparable ROI models, and leadership lacks the evidence required for multi-year commitments.

Increasingly, **data readiness, aggregation, cleaning and contextualisation – not technology availability – defines the pace of progress** on industrial efficiency.

This points to a shift in **what industrial players need most: end-to-end energy intelligence** – the combination of hardware, software, services, and expertise that turns data into actionable decisions.

CASE STUDY

From November 2024 to February 2026, ABB screened over 21,000 industrial electric motor-driven systems. Among these, 13,700 were prioritised and appraised, identifying average energy savings of 33 percent, equivalent to about 2,000 GWh each year[1] or the annual energy use of 186,440 US households[2].

1 Data based on ABB Energy Appraisals performed between November 2024 and February 2026
2 Green Power Equivalency Calculator | US EPA

SCALING DIGITAL

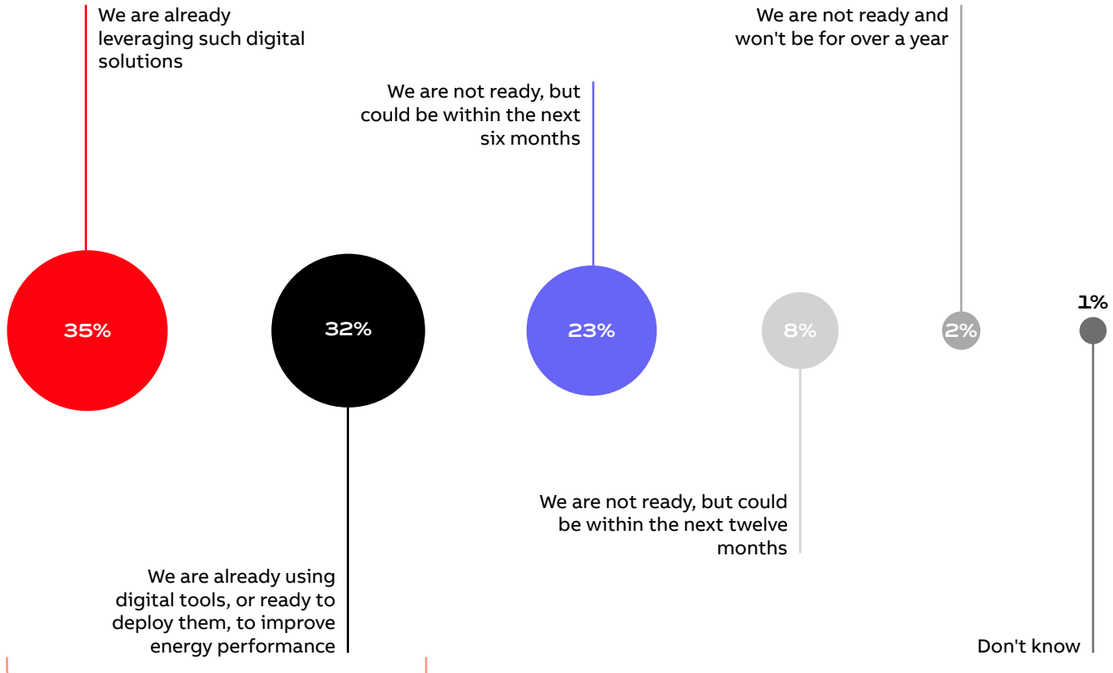
What separates digital experimentation from digital scale

Energy efficiency is no longer primarily a mechanical challenge. It is more and more a **data and execution challenge** – and digital tools have moved decisively into the mainstream.

In our survey, **over two thirds (67%)** said they are already using such tools (35%) or are ready now (32%) to deploy them to improve energy performance:

To what extent is your organisation ready to leverage digital solutions, such as AI analytics, to improve your energy efficiency?

DIGITAL READINESS 2026



67%

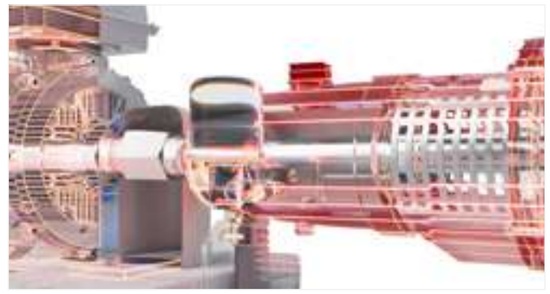
already using digital tools, or ready to deploy them, to improve energy performance

CLOSING THE EFFICIENCY EXECUTION GAP

This is a material shift: today, digital is valued as a way to accelerate insight, drive prioritisation, and prove savings.

CASE STUDIES

ABB has recently invested in OctaiPipe, a UK-based innovator using AI to optimise data center cooling – one of the most energy-intensive operations in digital infrastructure. With no new hardware required, their on-premises AI solution enables up to 30 percent energy savings, rapid deployment, and short payback periods.



Also, Samotics' Electrical Signature Analysis technology embedded in modernised drives unlocks continuous condition monitoring, spotting performance issues before they turn into costly failures.

A 43-point digital divide: where efficiency execution accelerates

Digital readiness varies sharply by market. Indonesia (60% already leveraging digital tools such as AI analytics) and Sweden (17%) sit at opposite ends of the spectrum, with a 43-point gap – the largest between any two countries surveyed - pointing to structural rather than strategic differences. In Asia-Pacific, digital efficiency tools are already mainstream: Indonesia is 25 points ahead of the global average, with Malaysia and India also showing high readiness, reflecting rapid industrial growth, newer infrastructure, and greater comfort with cloud-based solutions.

The correlation between digital readiness and investment ambition

Digital readiness and investment confidence move together. Among those already using digital solutions, **57 percent** expect investment to increase **significantly** over the next five years. Among those not ready for over a year, that figure drops to **zero percent**.

This creates a reinforcing loop: better data enables clearer ROI cases, which unlock investment – feeding further digital progress.

Digital as the gateway to execution

The level of digital readiness we're seeing in 2026 is genuinely encouraging. That said, digital adoption on its own isn't a magic bullet. As we noted earlier, data must be integrated, accessible, and trusted, supported by governance and skills that enable action.

The real test ahead is companies' ability to turn digital readiness into repeatable execution at scale.

THE CAPEX/OPEX TRAP

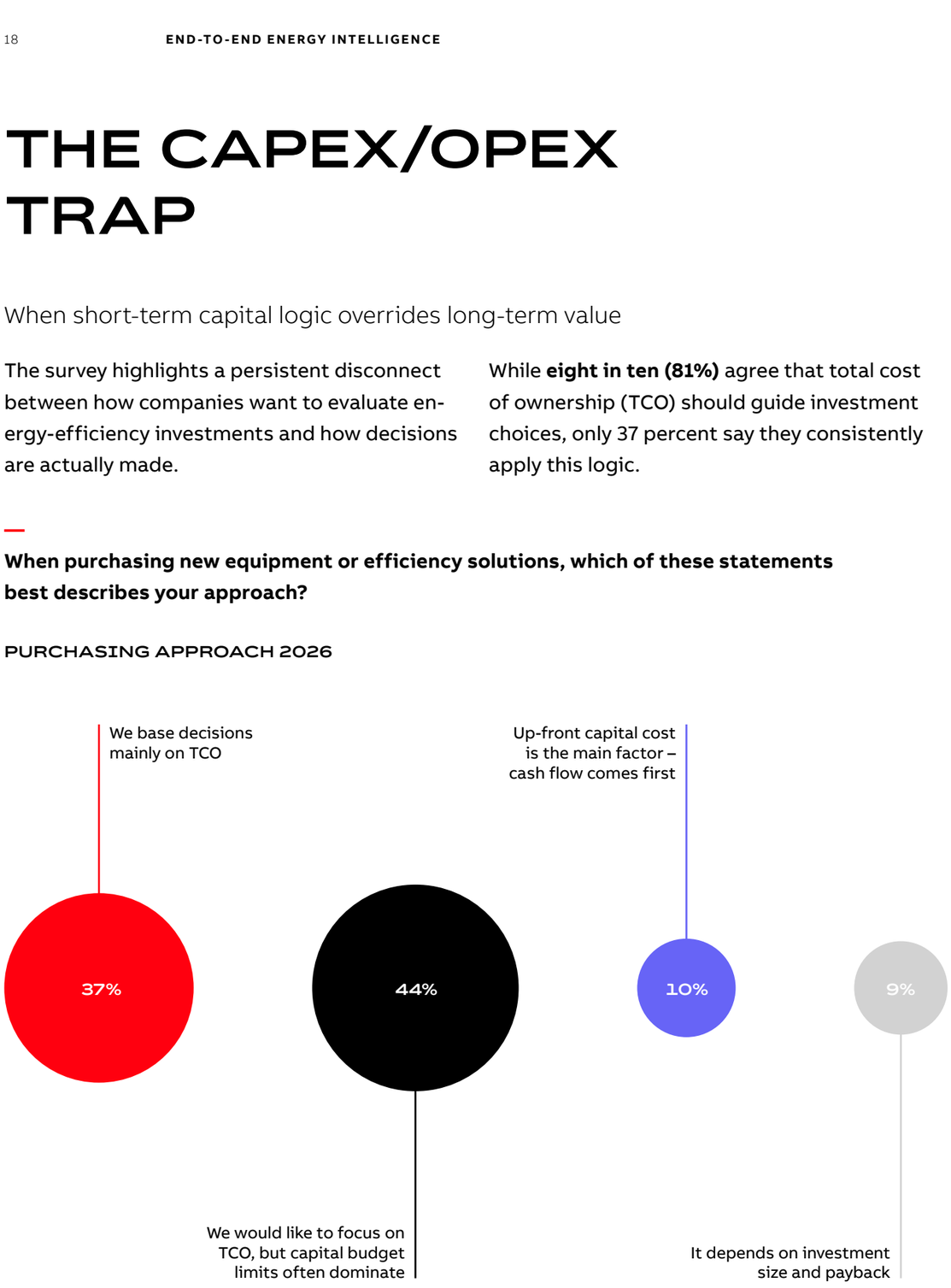
When short-term capital logic overrides long-term value

The survey highlights a persistent disconnect between how companies want to evaluate energy-efficiency investments and how decisions are actually made.

While **eight in ten (81%)** agree that total cost of ownership (TCO) should guide investment choices, only 37 percent say they consistently apply this logic.

When purchasing new equipment or efficiency solutions, which of these statements best describes your approach?

PURCHASING APPROACH 2026



For most organisations, upfront capital constraints continue to outweigh long-term operational savings. This gap is not new – but it is becoming more consequential as efficiency opportunities shift from low-cost, incremental measures toward deeper system-level improvements.

CLOSING THE EFFICIENCY EXECUTION GAP

Short-term budgeting versus long-term value
Many organisations operate with rigid capital-allocation cycles and conservative payback thresholds. As a result, projects that deliver strong lifetime savings may be delayed or deprioritised if they compete for limited CAPEX, even when operating-cost reductions are clear. The IEA's Energy Efficiency 2025 report notes that this short-termism remains one of the key reasons why industrial efficiency progress continues to lag technical potential.

The effect is cumulative: modernisation windows are missed, assets remain in service longer than planned, and avoidable energy costs and emissions are locked in.

Organisational silos reinforce the problem
Procurement, operations, finance, and sustainability teams frequently operate with different goals and metrics. While energy savings accrue over time, capital decisions are assessed at the point of purchase. The WEF's Effective Energy Transition 2025 report highlights this misalignment as a structural barrier to scaling industrial transition efforts, particularly in energy-intensive sectors.

The result: efficiency ambition constrained by finance models
The consequence is not a lack of viable efficiency opportunities, but a lack of decision frameworks that reflect their full value. Without mechanisms that align capital approval with operational savings, many organisations remain stuck in incremental upgrades.

CASE STUDY

In this context, helping industrial players work through these financial structures is just as important as providing good kit – something ABB has experience in with the likes of E.ON. The best efficiency technology in the world will gather dust if the customer cannot get it through their finance committee.

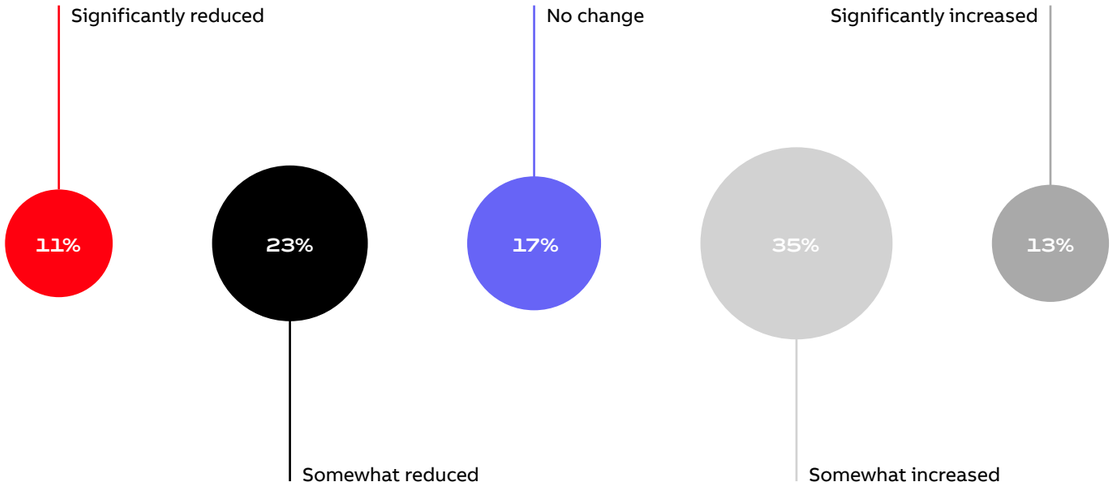
NET ZERO REALITY CHECK

When ambition remains high, but delivery starts to drift

Renewables don't replace efficiency
The survey reveals a tension between renewable adoption and sustained efficiency efforts. Among respondents who have switched to renewable energy sources **(39% of the sample; 1,062 companies)**, over **one in three (34%) report a reduced focus on efficiency**, while nearly **half (49%)** say it has increased.

Since switching to renewable energy sources, has your organisation changed its focus on energy efficiency?

CHANGE IN EFFICIENCY FOCUS AFTER ADOPTING RENEWABLES



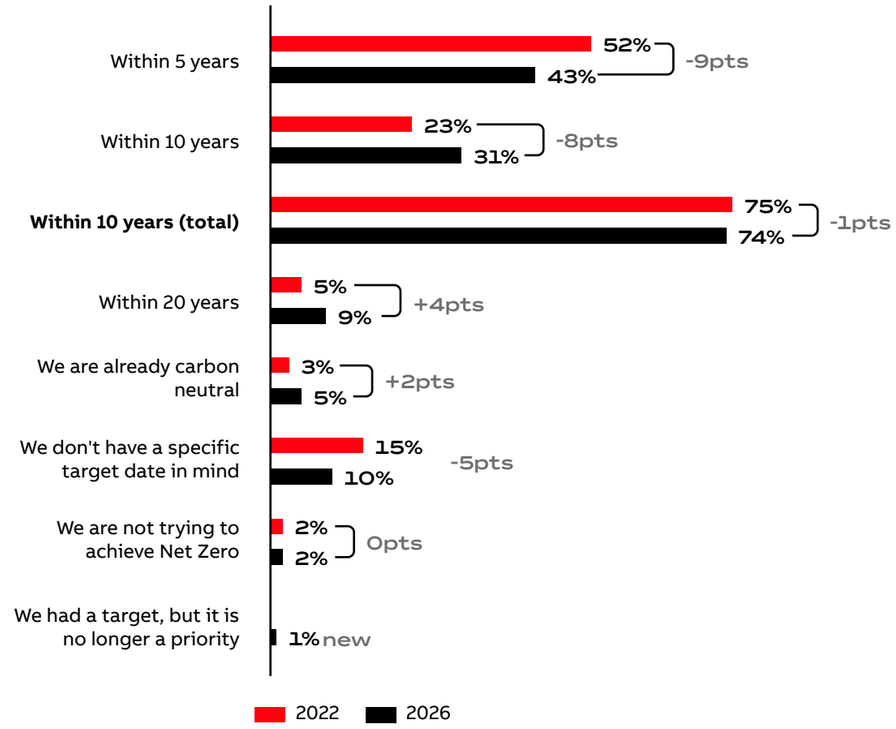
34%
Total reduced

48%
Total increased

The 34 percent decline is significant. It reflects a misconception that cleaner energy reduces the need to use less of it. Renewables address **carbon intensity**, not **energy demand**. An inefficient site can still waste energy, face capacity constraints, and carry avoidable costs even if its electricity is low-carbon.

Treating renewables as a substitute for efficiency risks **leaving huge performance gains on the table**, as it conflates two distinct challenges: decarbonisation and demand reduction. Both are necessary.

What is your company's target date for achieving Net Zero emissions (if any)?



Note: "We had a target, but it is no longer a priority" was a new response option added in 2026.

Targets hold – delivery lags
When mapping respondents' target dates for achieving Net Zero emissions, ambition remains broadly intact: **74 percent** of respondents still target "Net Zero" within **ten years**, consistent with 2022 (75%).

However, the mix is shifting: fewer now aim for delivery **within five years** (52% to **43%**) and more target **within 10 years** (23% to **31%**), suggesting timelines are stretching.

Only 5 percent report already being "carbon neutral", i.e. having balanced carbon emissions (distinct from "net zero" which refers to all greenhouse gases), and **1 percent** say a target is no longer a priority (≈ 27 respondents out of 2,700). That's a new answer option in 2026, and while it's a small number, it's the first sign we've seen of Net Zero fatigue showing up in the numbers.

Intent is widespread; execution is faltering
The paradox shows up in two ways. First, over one third of companies dial back efficiency once renewables are in place. Second, three-quarters are still aiming for "Net Zero" within ten years, but only 5 percent have achieved the status of "carbon neutrality" thus far - and when you look closely the timelines are creeping outward.

The bottom line: **the next phase of energy transition will succeed or fail based on whether organisations can sustain execution discipline** – not just set targets, but build the capabilities, partnerships and persistence to deliver them.

CLOSING THE EFFICIENCY EXECUTION GAP

ABB'S VIEW

The findings in this report point to a clear inflection point for energy efficiency. Awareness is high, investment is widespread, and action is nearly universal. Yet progress remains uneven. The defining challenge is no longer why efficiency matters, but how it is executed. So, here's our view on the how.

01 Efficiency must be managed as a system, not a series of projects

Fragmented actions will never deliver lasting impact. The strongest results come from an end-to-end view of assets, processes, and energy flows – allowing industrial players to prioritise interventions across the whole site and scale them in other factories.

02 Modernisation remains essential

Despite perceptions of saturation, significant untapped potential remains in core electrical motor-driven systems that underpin most operations. Upgrading those systems to high-efficiency ones ensures critical assets meet today's performance, digital, and resilience requirements.

03 Data must lead to decisions

Digital readiness is rising, but value is created only when insight translates into action – through clear ownership, repeatable processes, and low-friction execution.

This is where ABB supports industries. We start with **energy appraisals** to identify quick wins and long-term opportunities, turning data into a prioritised business case. We then help **implement change** – by **upgrading** legacy systems to ABB IE5 or IE6 ultra-premium efficiency synchronous reluctance motors (SynRM), combined with variable speed drives (VSDs), as well as through intelligent software that continuously optimises energy use. Flexible, **outcome-based financing** removes upfront barriers. Finally, **lifecycle services** such as ABB Motion OneCare help sustain performance, protect investments and enable continuous improvement.

This approach delivers **end-to-end energy intelligence**, integrating hardware, software, services, and expertise to move from intent to execution, and from isolated actions to long-lasting performance gains.

METHODOLOGY

Fieldwork

Conducted by Sapio Research on behalf of ABB Motion Services, Dec 2025–Jan 2026

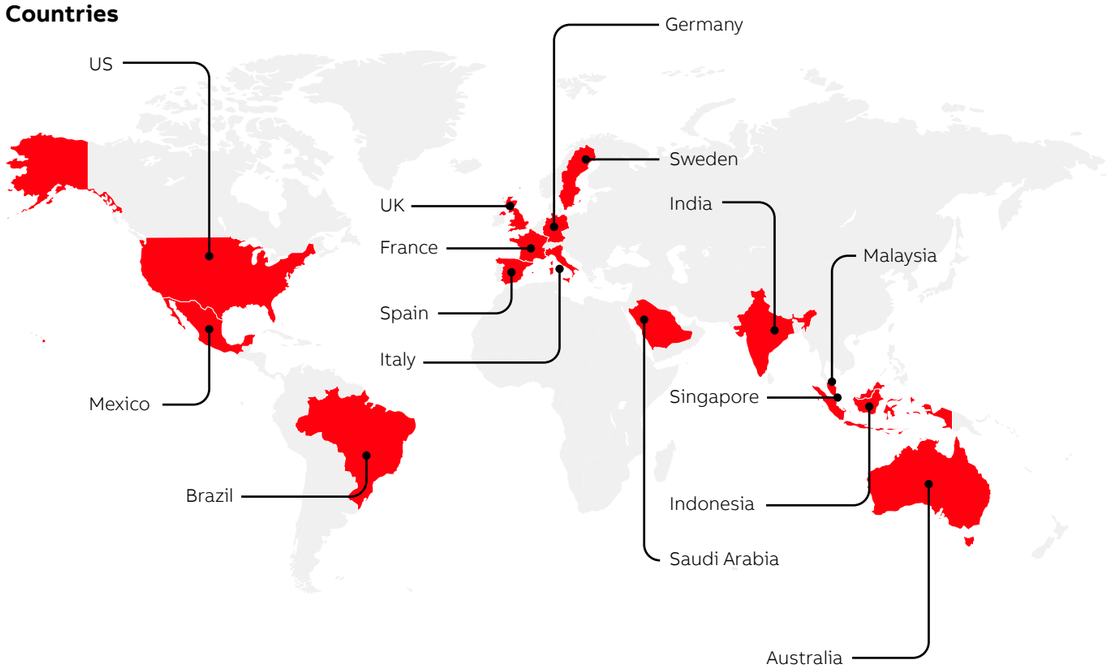
Sample size

2,700 respondents

Sectors

- Data centers
- Food & Beverage
- Energy / Power
- Oil & Gas
- Refrigeration
- Metals
- Utilities
- Chemicals
- HVAC
- Mining
- Plastics / Rubber
- Water / Wastewater
- Cement
- Semiconductor
- Pharma

Countries



Where comparisons are made with 2022 data, findings should be interpreted with caution and in context rather than as a strict longitudinal trend or direct comparison. While the core research design remains consistent, changes have been made to sample composition and question framing and wording, to reflect the evolving industrial and energy landscape between survey waves.

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