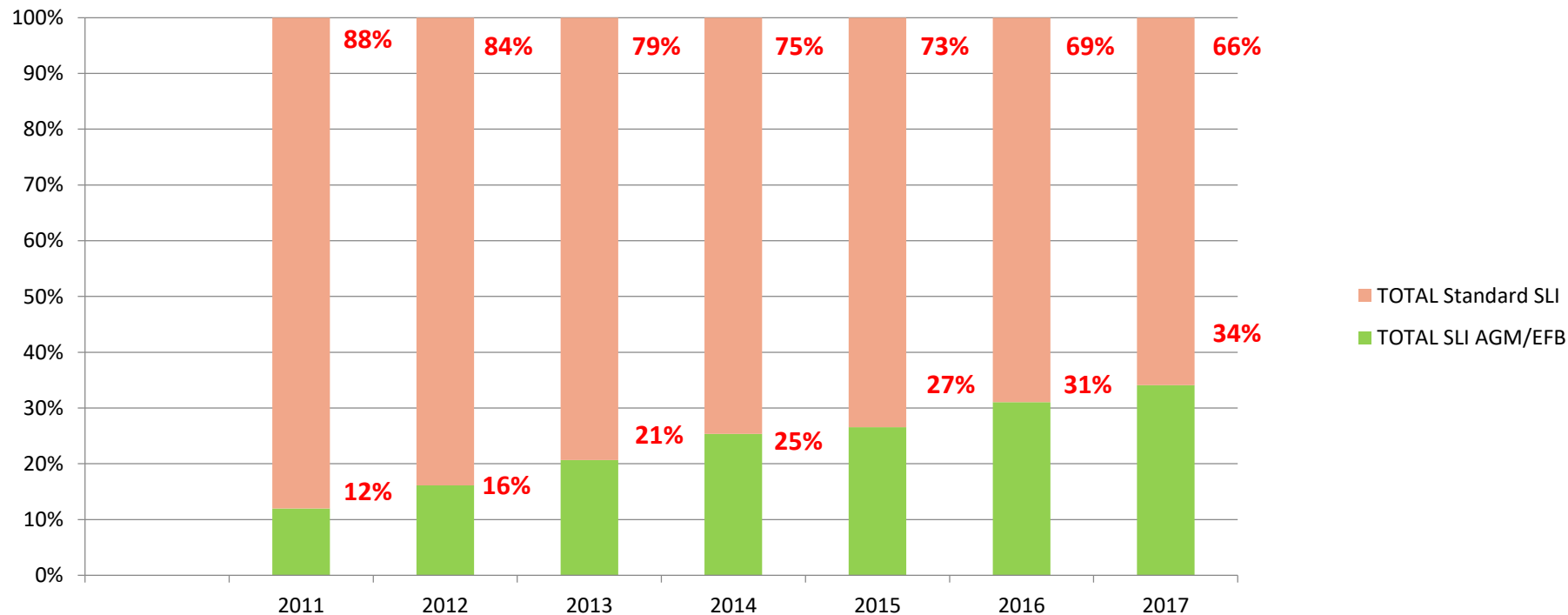


Automotive Battery Committee

Battery Market Outlook – update June 2018

Trend: Standard SLI & Micro hybrid start-stop markets Based on EUROBAT SLI AGM/EFB Internal Surveys*

Standards SLI versus AGM/EFB total market (**Turnover 2017= 2,9 B€**)
Automotive markets OEM + OES + IAM, in M units (PC + LCV, excluding HCV)

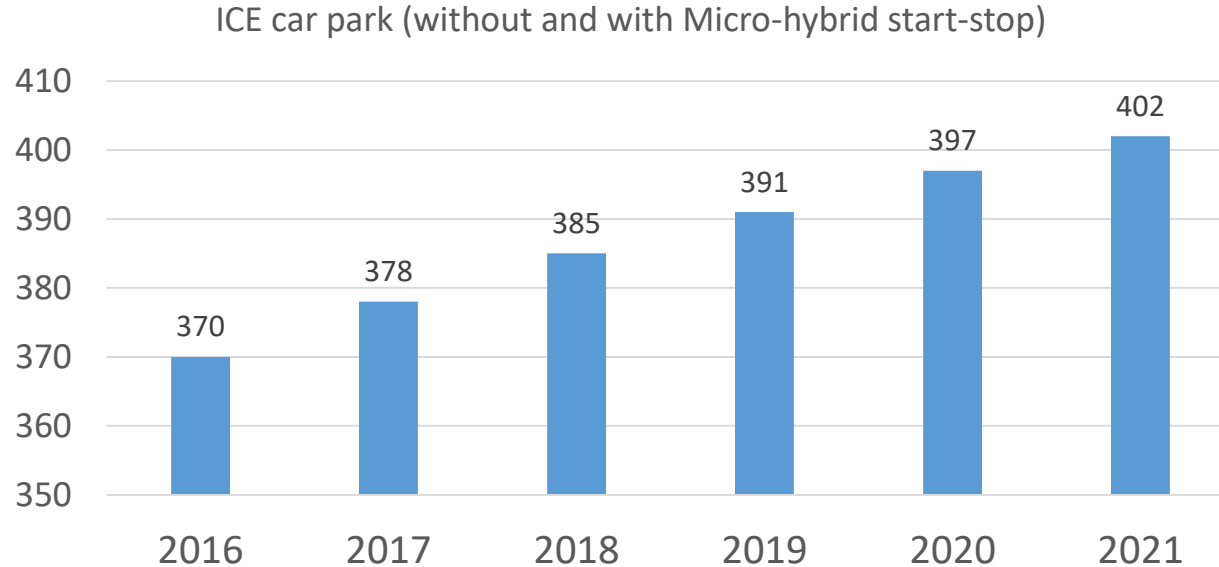


Continuation of the replacement trend Standard SLI by Advanced Batteries (AGM/EFB) reconfirmed

Part IV: Statistics

Future: Trend starter Battery markets OE & AM (in M units) Based on IHS

Evolution of the car park in coming years (in M units)



- Car registrations continue to growth
- Car park in 2021: EVs 03% - (p)HEV 0,8% and ICEs (with or without S-S): 98, 9%