Industrial Batteries Committee

Battery Market Outlook – update June 2017

EUROBAT AGM Brussels, 8 June 2017
Results IBC Internal surveys 2016 (in M€ - member data only)

1. Stand-by Lead battery Market – Total EMEA: 536 M€
   83% Sealed – 17% Flooded

   Double digit market increase 2015-2016:
   • Double digit Growth in both technologies; Sealed and vented
   • Major contributor: AC UPS markets

2. Non-lead batteries - Total EMEA in M€
   Nickel, Sodium, Lithium

   Total EMEA: Motive and stand-by (including energy storage): 176 M€  Trend 2015-2016: -11% 2

3. Motive Power battery Markets
   We need more participating members to allow for publication of results in compliance with legal advice
   → Call for additional candidates to participate to EUROBAT internal IBC surveys
Evolution of Battery Imports Into EU 28 (in M€)

### Lead batteries
- Top 5 countries: China, US, Vietnam, India, S-Korea
- Double digit growth stopped in 2016 due to China (-12%)
- Vietnam, India, S-Korea: filling the gap of China

### NiCd batteries
- Two major countries: China and US
- Growth rate stopped in 2016 due to China (-18%)
- No significant increase from other countries to fill the gap

### Li-Ion batteries
- Top countries in 2016: China (823M) & S-Korea (788M), followed by US (474M) and Japan (457M),
- Continuation of the double digit growth: all countries contributing, S-Korea with +52%)
- European Battery manufacturers not benefiting of the EU market increase