Industrial Battery Committee

Battery Markets Outlook – Update June 2018

EUROBAT GA Brussels, 14 June 2018
EUROBAT IBC Internal Sales Surveys* – lead batteries

Stand-by market 2017: Total EMEA: €538 M (+0.3%)

Stand-by applications: Sealed 86% - Flooded 13%

Status-quo compared to 2016 (+0.3%)
- Communication: +3%
- UPS AC: +1.5%
- Others (including ES): -2%

Traction batteries market 2017: Total EMEA: €908 M (+6%)

Flooded technology only

Traction application: 98% 2V cells – 2% monoblocs

*Member data only
EUROBAT IBC Internal Sales Surveys* – non-lead batteries

Total battery Market EMEA: 1,728 M€

Stationary and traction markets, excluding automotive and road electric vehicles

Lead batteries 89% - non-lead batteries 11%

1536
192

lead batteries  Non-lead

*Member data only
** non-lead = Lithium, nickel and sodium based batteries
Import Statistics EUROSTAT - in currency (M€)

### Pb-based batteries (stationary and traction, excluding starters)
- Double digit growth stopped in 2016
- 2017: increase with +14,5% up to 806 M€

Top 3 countries 70% of EU imports:
- China: 347 M€ (+10%)
- Vietnam: 110 M€ (+50%)
- US: 97 M€ (-8%)

Smaller contributors very fast growing:
- S-Korea (17 M€): +100%
- Turkey (7 M€): +200%

### Ni-based (mainly portable but also stationary and traction)
Niche market
Total EU imports
- Continue to lower (-3,5%)
- Still under the level of 2014
Due to
- China (-17%) and Japan(-25%)
Some contributors increasing
- US (+15%) and Vietnamm (+62%)

### Li-based batteries (portable, stationary, motive and automotive)
Year after year double digit growth: 2017: + 27%
- Two countries 60% of EU imports
  - S-Korea; passing over China with 1,200 M€ (+50% annual grow)
  - China 1,000 M€ with annual growth of 29%
- Two other strong contributors:
  - US: 500 M€ (+ 7%)
  - Japan: 500M€ (+10%)