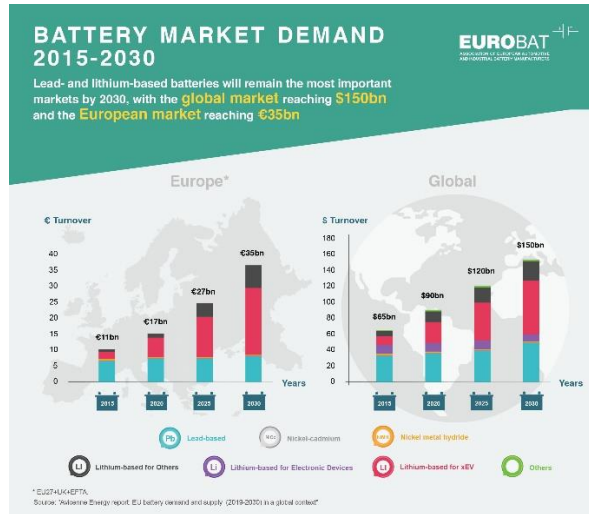


Brussels, 17 May 2021

**Avicenne study: “EU battery demand and supply (2019-2030) in a global context” shows that in the next decade lead and lithium batteries are critical to clean energy transition**



- *Li-ion and lead-based batteries will be the two mainstream technologies by 2030 and both are required to serve the anticipated increase in demand and the different applications*
- *The EU lead-based battery industry will maintain a strong position and will be able to meet projected growth, but ongoing investments in R&D and production enhancement are required*
- *The European Li-ion battery industry will have the capacity to serve growing demand from 2023/24.*
- *EU battery market value to grow from EUR 15bn in 2019 to an estimated EUR 35bn in 2030.*

EUROBAT – the association of European Automotive and Industrial Battery Manufacturers – is today releasing the “EU battery demand and supply (2019-2030) in a global context” independent market report, produced by leading energy consultancy Avicenne Energy.

The study covers the mainstream battery technologies on the market today – lead-, lithium-and nickel-based technologies – plus a number of other chemistries, and covers “**automotive**” (12V and xEV) as well as “**industrial**” (stationary and motive) applications

The key conclusions for **automotive applications** are:

- Across all levels of e-mobility, **lead-based batteries** will continue to be dominant in the **12V market** – both for SLI (start, lighting, ignition) and auxiliary functionalities. By 2030, it is estimated that only 3% of new cars will be fitted with a lithium 12V battery.
- For xEV **traction batteries**, **lithium-based** batteries will remain the exclusive chemistry.

For **industrial batteries**, the main takeaways can be summarised as follows:



- For **UPS (Uninterruptible Power Supply)** and **Telecom** applications, **lead-based** batteries will still be dominant in 2030.
- For **Energy Storage Systems (ESS)**, the preferred technology will be almost exclusively **lithium-based** by 2030.
- For **Motive Power applications**, where lead-based batteries are today still dominant, will gradually shift to **lithium-based** by 2030.

The study was first presented at EUROBAT's "**Sustainable Batteries**" webinar on 11 March, which evaluated the critical role that sustainable batteries will play in supporting the European Green Deal and enabling the 'Green Recovery'.

The main purpose of the study was to obtain a good picture of battery demand and production in Europe today and in the future, as well as to understand the extent to which the European battery industry will be able to cope with future demand.

**Rene Schroeder, EUROBAT Executive Director**, said: "Independent market information, offering us a good understanding of both battery demand and production in Europe - today and in the future - is crucial for understanding the state of the industry. It is very encouraging to see that from one side the EU lead-based battery industry will retain its strong position, while local lithium-based battery production will ramp up dramatically, making the EU self-sufficient by 2024.

The new "**Batteries Regulation**", the most important legislation for the industry for the next 15 years to come, is currently on the table. It has a clear ambition to turn Europe into a "leader in green and sustainable batteries". EUROBAT has raised [a number of concerns related, for example, to recycled content, hazardous substance management, lack of business certainty and administrative burden](#), which could potentially negatively impact the forecasted growth and European autonomy. It is crucial that EU policy-makers create a level playing field, also applying to batteries produced outside Europe."

**Christophe Pillot from Avicenne Energy**, who conducted the study, commented: "It is very clear that both lead- and lithium-based chemistries will become the main players over the next decade. Both technologies will be critical in achieving the clean energy transition, catering for the specific application requirements in the automotive and industrial markets. By 2030, we anticipate a ten-fold market growth for lithium batteries across all applications, but almost exclusively driven by a steep increase in e-mobility. Demand for lead-based batteries will slightly grow and lead-based batteries will remain the preferred chemistry for 12V applications in automotive and in some industrial applications, such as Uninterruptible Power Supply and Telecom."

The presentation **summary** slide deck is downloadable via this [link](#)

**EUROBAT** position papers on the "[Batteries Regulation](#)"

The **full video of the EUROBAT webinar of 11 March** can be found [here](#)

**MEDIA CONTACT:** *Gert Meylemans*



+32 2 761 1653 / +32 475 565 6561



[gmeylemans@eurobat.org](mailto:gmeylemans@eurobat.org)



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## About EUROBAT

EUROBAT is the association for the European manufacturers automotive, industrial and energy storage batteries. EUROBAT has more than 50 members from across the continent and from the whole supply chain comprising more than 90% of the automotive and industrial battery industry in Europe. The members and staff work with all stakeholders, such as battery users, governmental organisations and media, to develop new battery solutions in areas of hybrid and electro-mobility as well as grid flexibility and renewable energy storage.