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Definition of SLI battery markets and calculations methods




- OEM Automotive SLI Battery Market

- Calculation method Battery OEM*:

- **PC and LCV** battery market = Production data of PC and LCV  
- **HCV** Battery market = Production data of HCV x 1,7 batteries 

- AM Automotive SLI Battery market

- Calculation method Battery AM**:

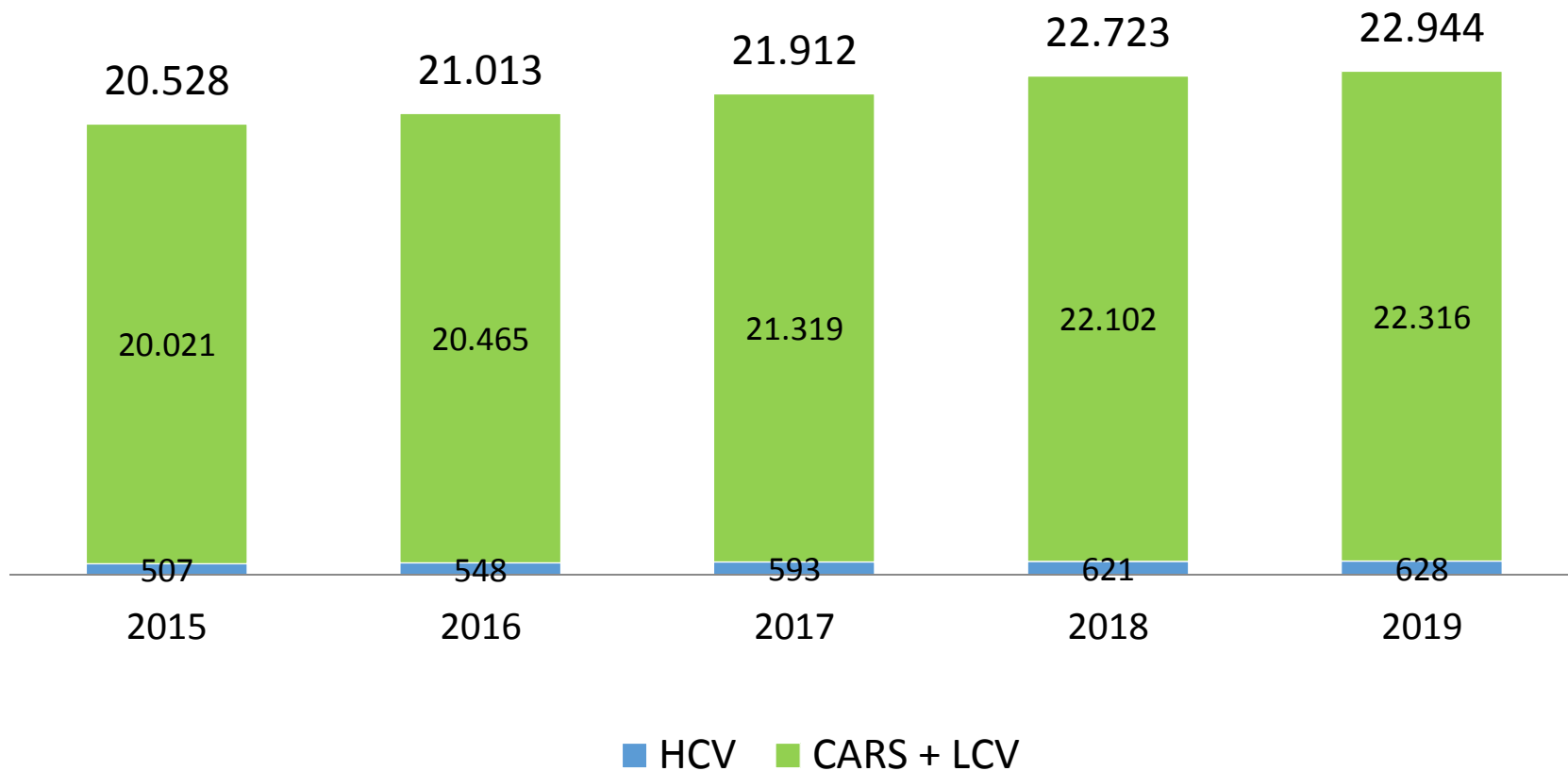
- **PC & LCV** Battery market
= PV & LCV registrations x Battery replacement rate (in %)  
- **HCV** Battery market = HCV Registrations/ Battery life span x 

Automotive SLI Battery Market Volumes

2015 – 2019

OEM

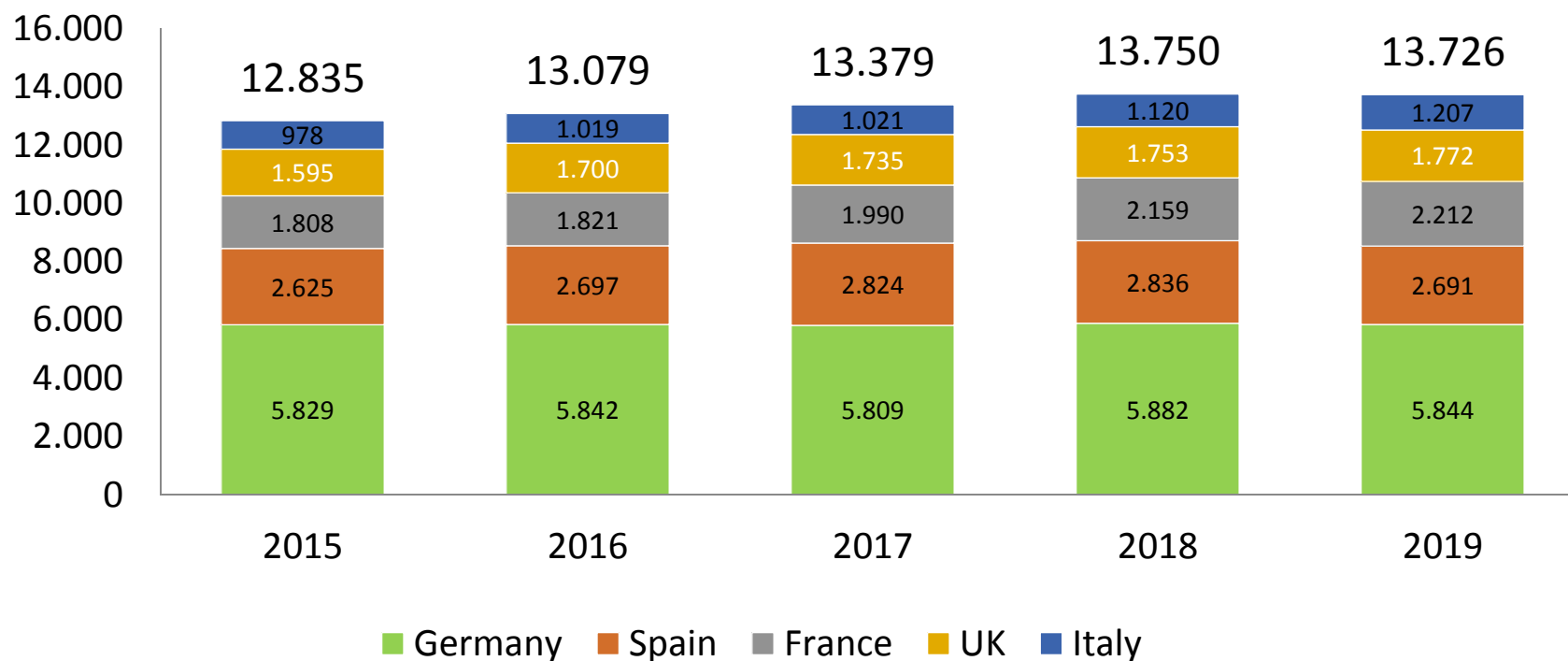
Vehicle Production Europe* 2015-2019 (in M units)



Automotive SLI Battery Market Volumes 2015 – 2019

OEM

Vehicle Production per country 2015-2019
(in M units)
BIG-5 countries W. EU

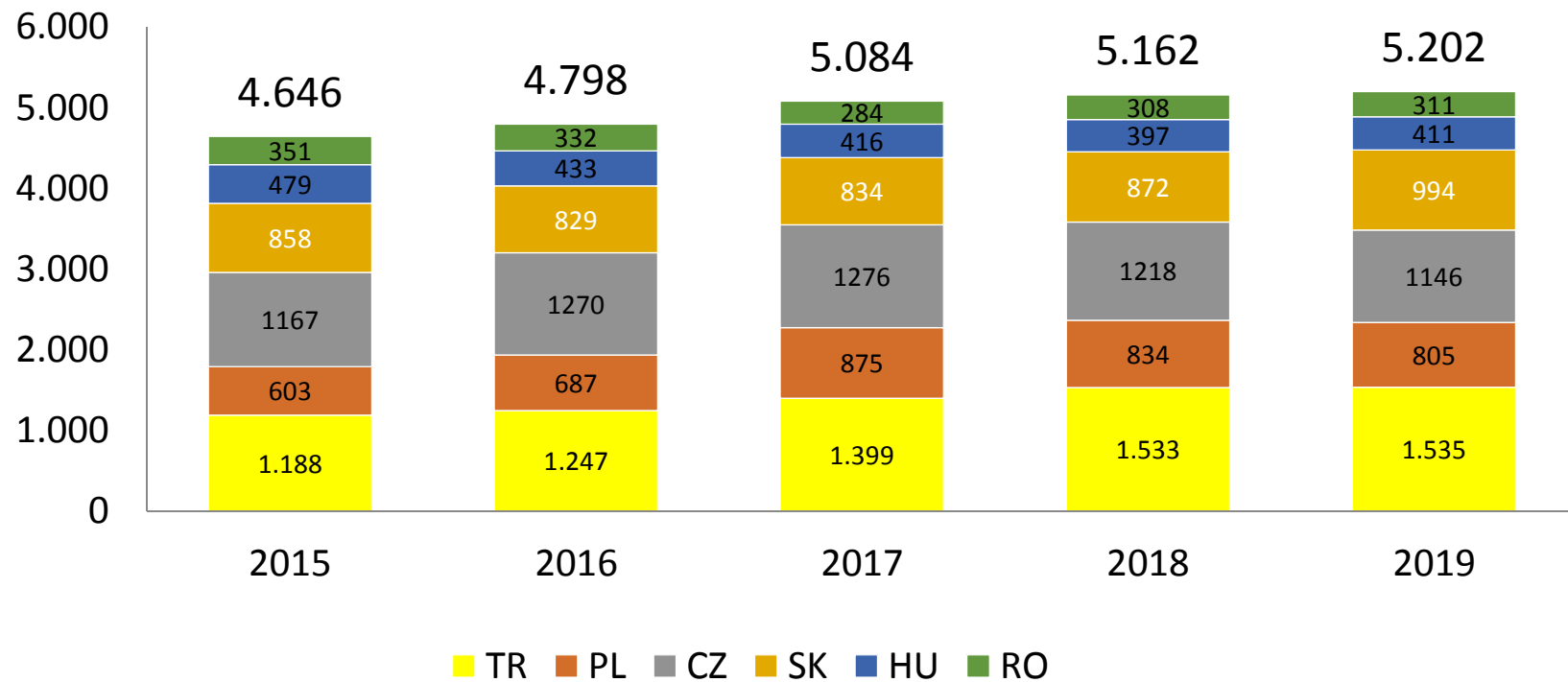


Automotive SLI Battery Market Volumes

2015 – 2019

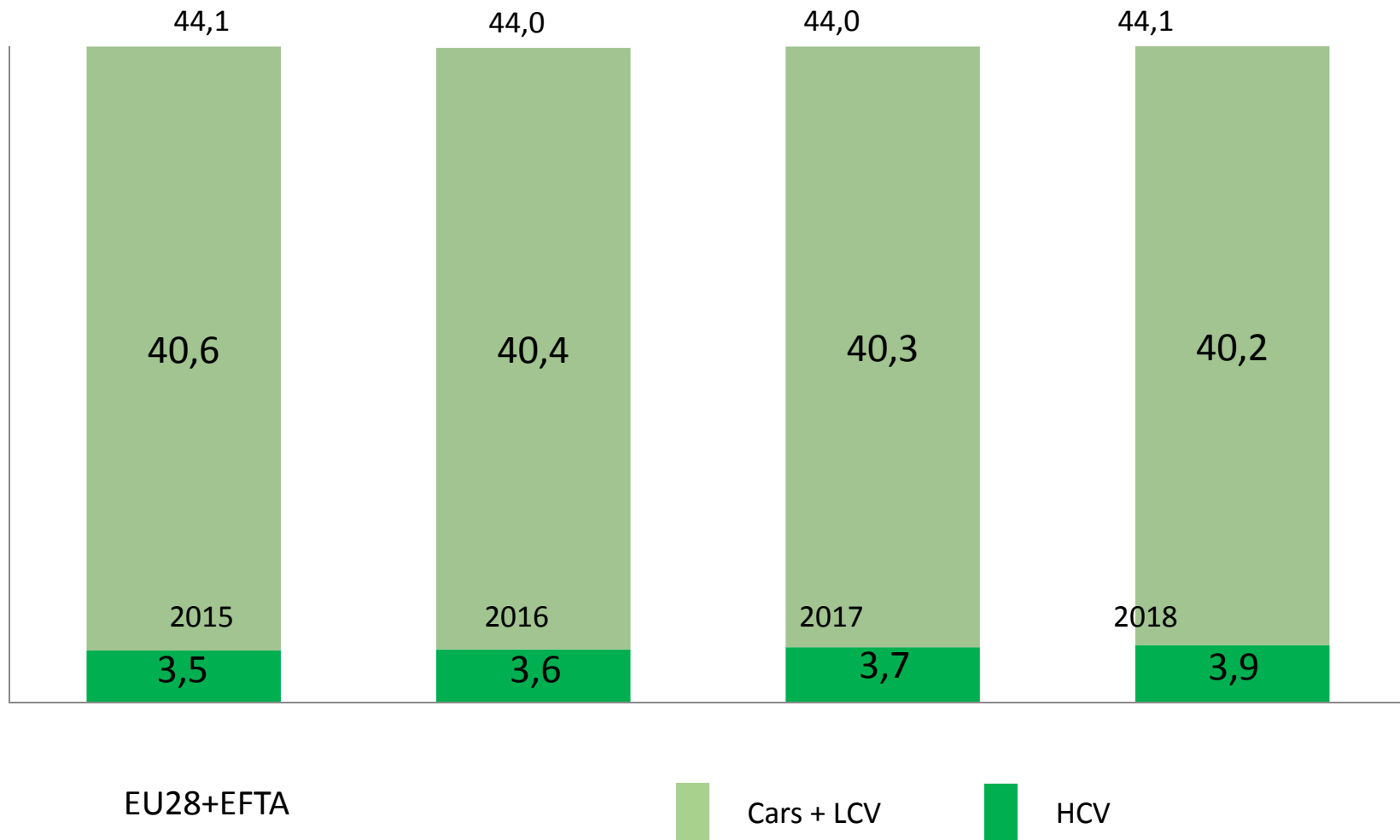
OEM

Vehicle Production per country 2015-2019
 (in M units)
 BIG-6 countries E. EU



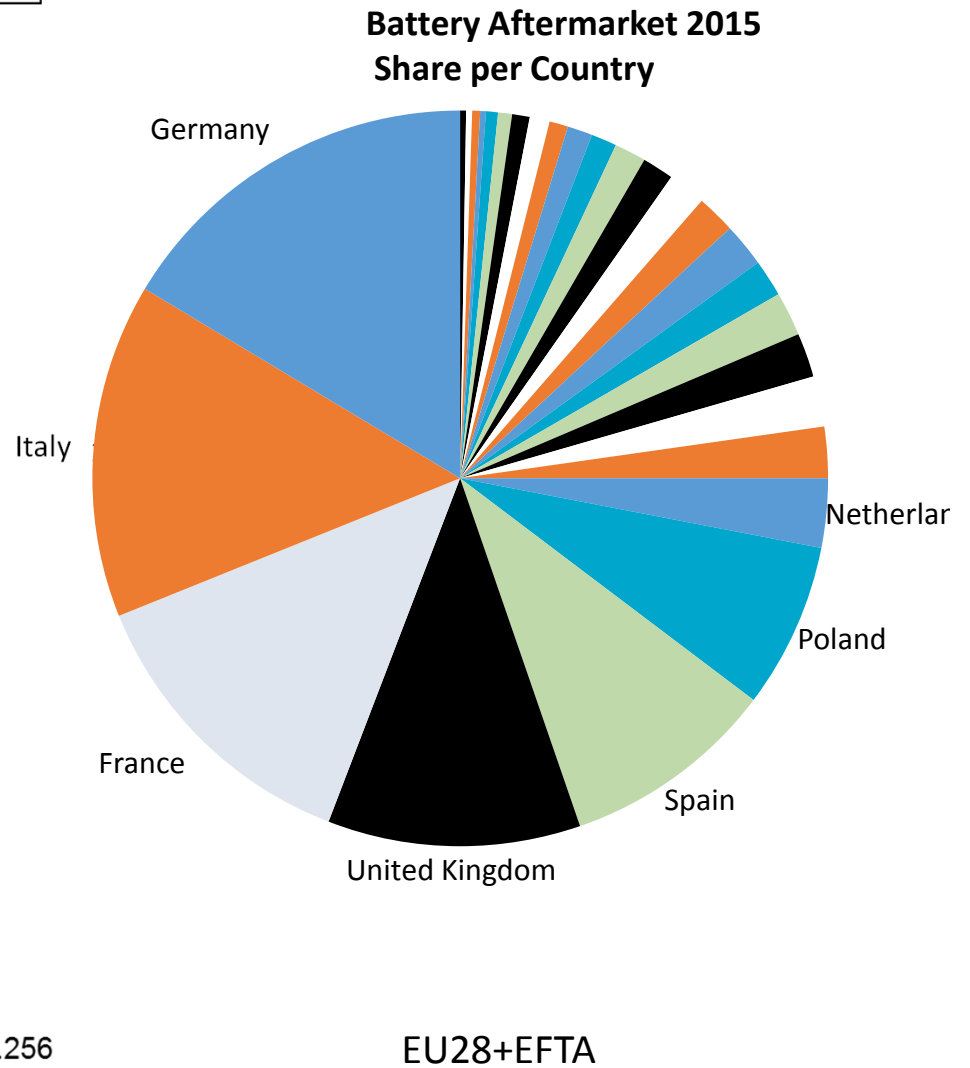
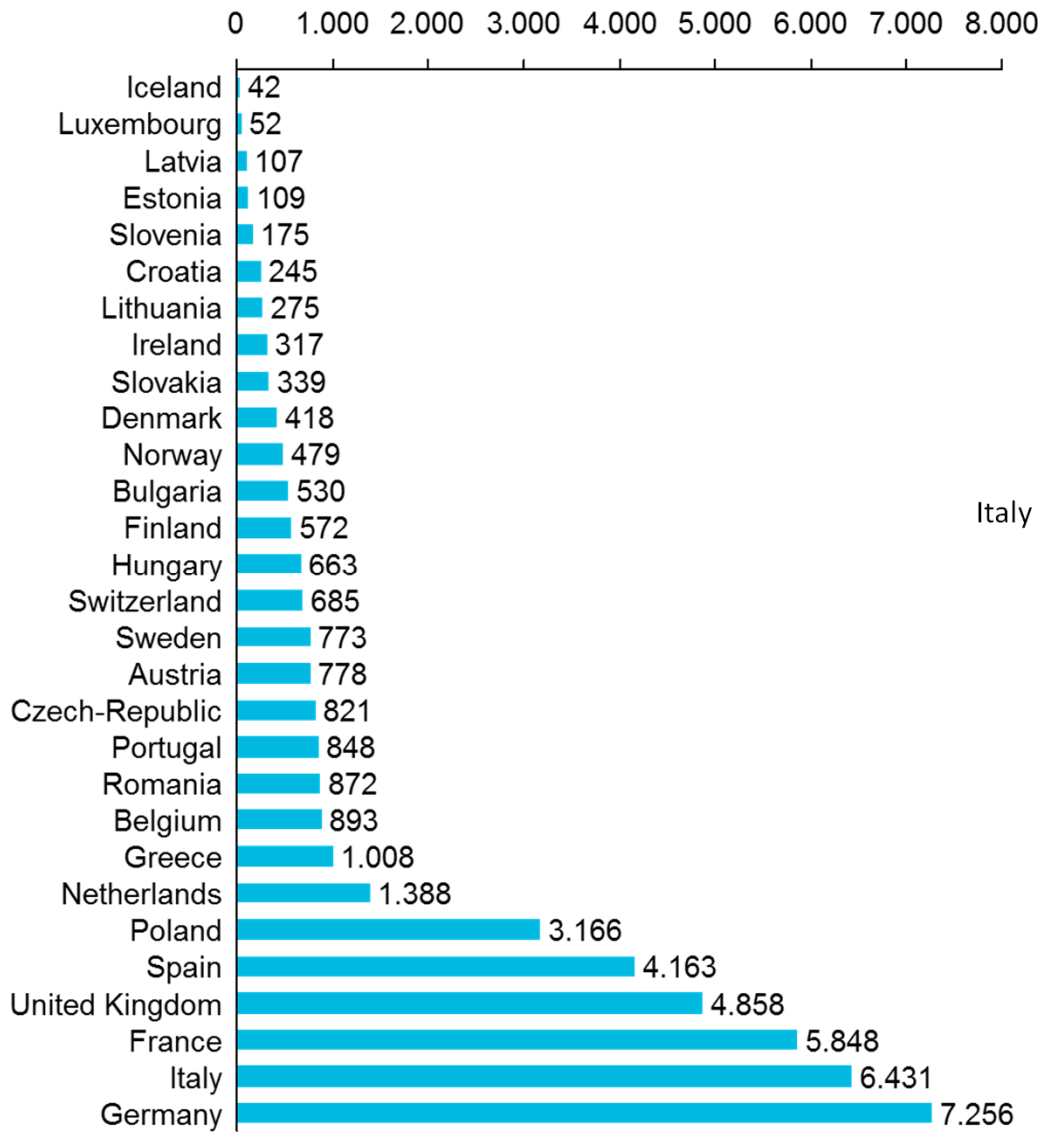
Automotive SLI Battery Market Volumes 2015 – 2018 AM

Aftermarket battery volume* 2015-2018 (in M Units)



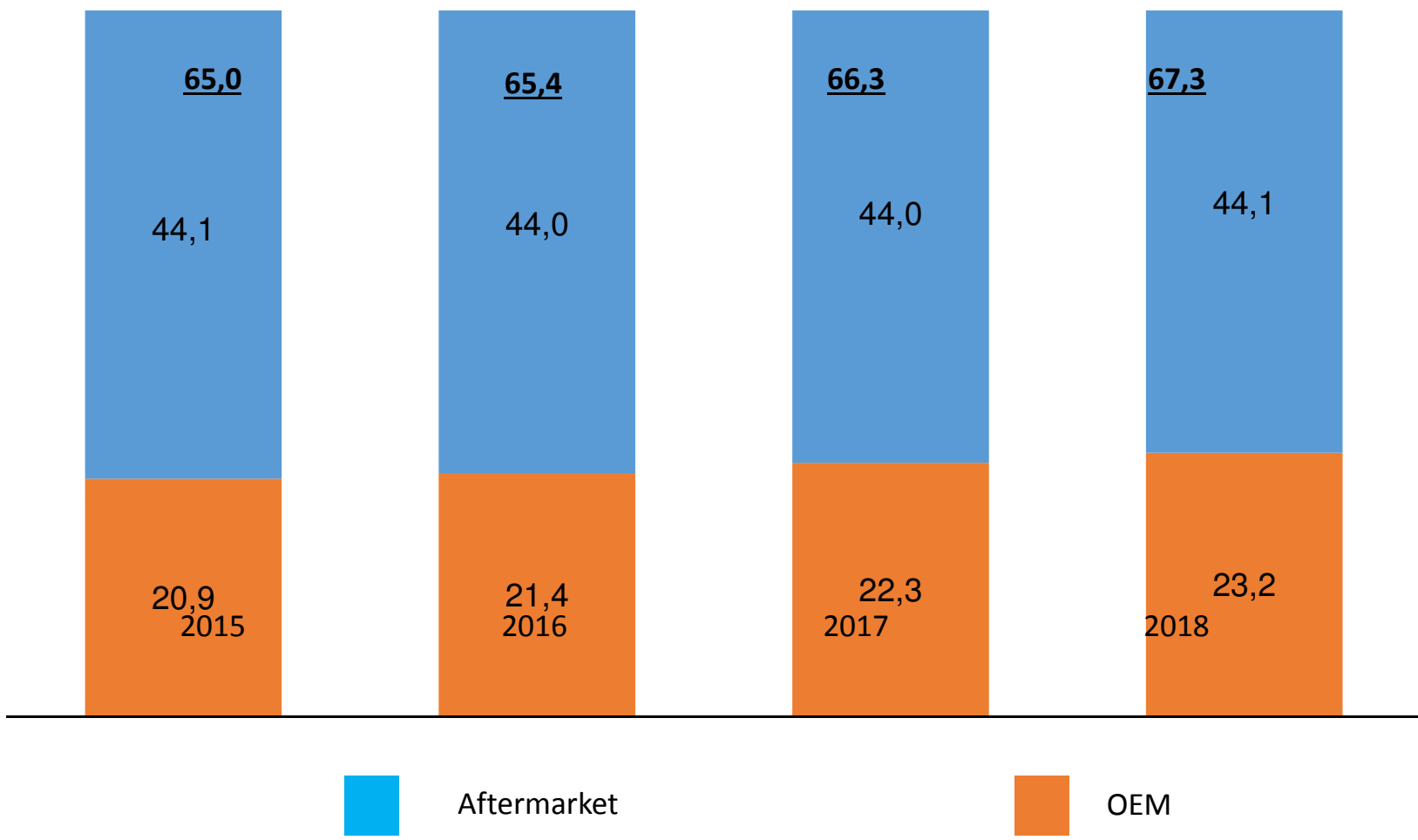
Automotive SLI Battery Market Volumes

AM per Country (x1000)



Automotive SLI Battery Market Volumes 2015 – 2018 AM + OEM

Total battery market volume* 2015-2018 (in M Units)



Results EUROBAT Internal SLI Survey 2015

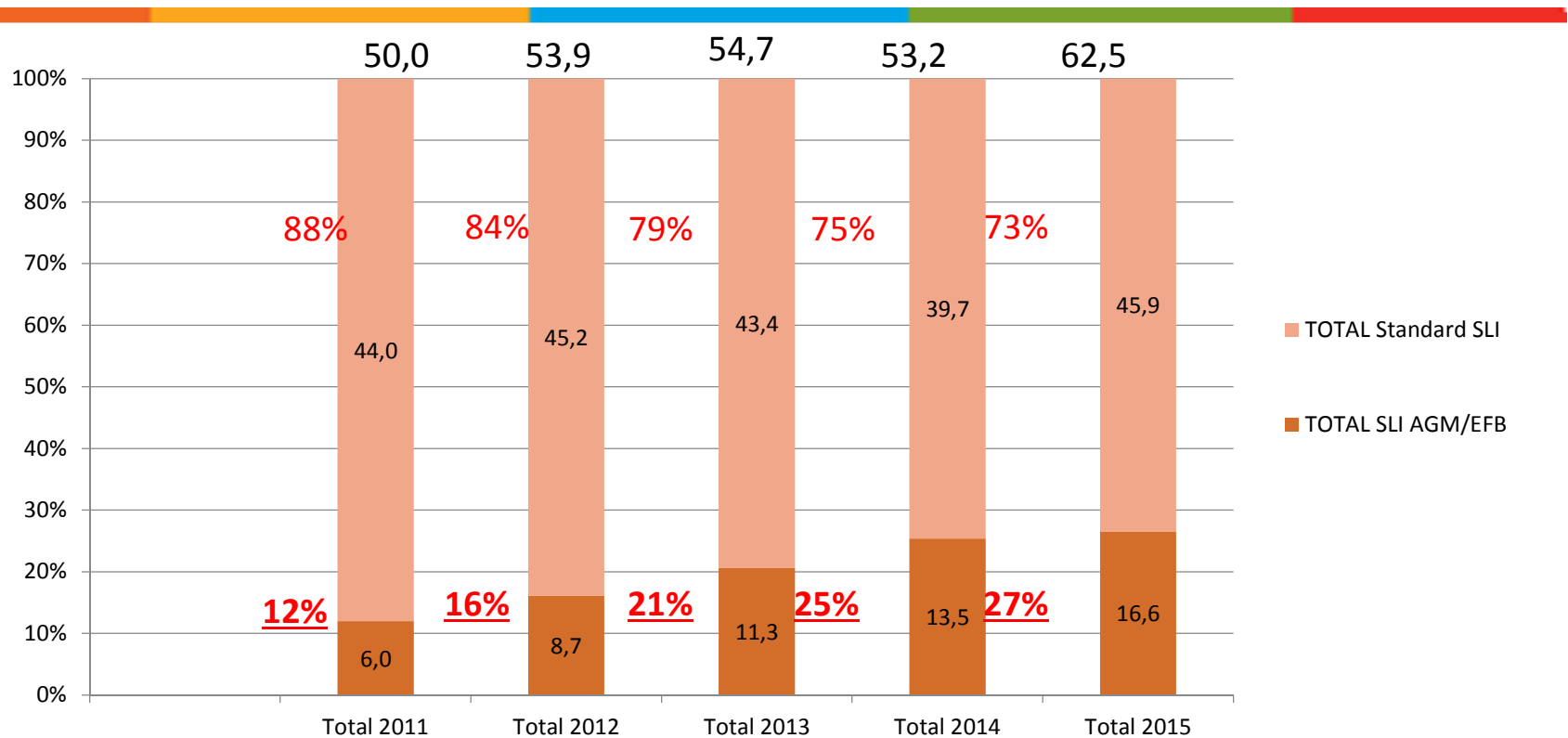
European sales (in units)	1H2015	2H2015	Total 2015
TOTAL Market AGM/EFB SLI Batteries (units)	8.454.702	8.166.000	16.620.702
TOTAL market Standard SLI Batteries(units)	19.681.757	26.205.901	45.887.658
TOTAL (Units)	28.136.459	34.371.901	62.508.360
Turnover (€)	1.208.568.098	1.372.571.749	2.581.139.847

Conclusions:

- Strong leadership of the EU Battery manufacturers , dominating the market
- SLI Battery market split:
 - Start & stop (AGM/EFB) Batteries: 27%
 - Standard SLI batteries: 73%

Historical data EUROBAT ABC Internal Survey

Evolution market share AGM/EFB versus Standard SLI Batteries (M units)



Conclusions:

- Increased share AGM/EFB versus SLI standard batteries over last 5 years

Automotive Statistics Historical data EUROBAT Internal Survey

Evolution market share AGM/EFB versus Standard SLI Batteries (M units)

Conclusions:

- Increase market share AGM/EFB versus Standard SLI to be continued
- Trend based on EU legislation
- SLI After Market will follow the OEM trend in the next 5 years
- SLI batteries contribute today to fuel savings and reducing carbon emissions
- EU Battery Industry value chain is over 30,000 workers in Europe and should continue to lead the transition

- Thank You -

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