EUROBAT FORUM 2017
8 / 9 JUNE BRUSSELS

Industrial Battery Committee (IBC)

Gery Bonduelle
Chairman

Brussels – 8 June 2017

EUROBAT statistics – update 2017
Results IBC Internal surveys 2016
(in M€ - member data only)

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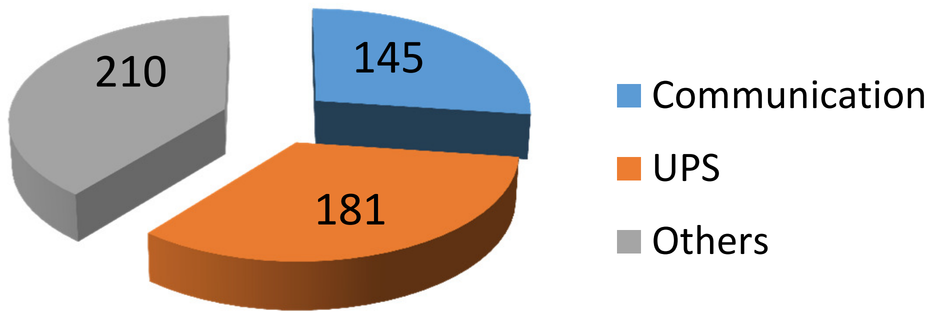
1. Stand-by Lead battery Market – Total EMEA: 536 M€)

83% Sealed – 17% Flooded



Market decreasing 2015-2016: -10%

- AC UPS: ↑
- Communication: ↓

2. Non-lead batteries - Total EMEA: 176 M€

Nickel, Sodium, Lithium

Total EMEA: Motive and stand-by (including energy storage):

Trend 2015-2016: -11%

Oil & gas industry ↓

3. Motive Power batteries – Total EMEA : 900 M€

Flooded - about 90% of the total lead battery market

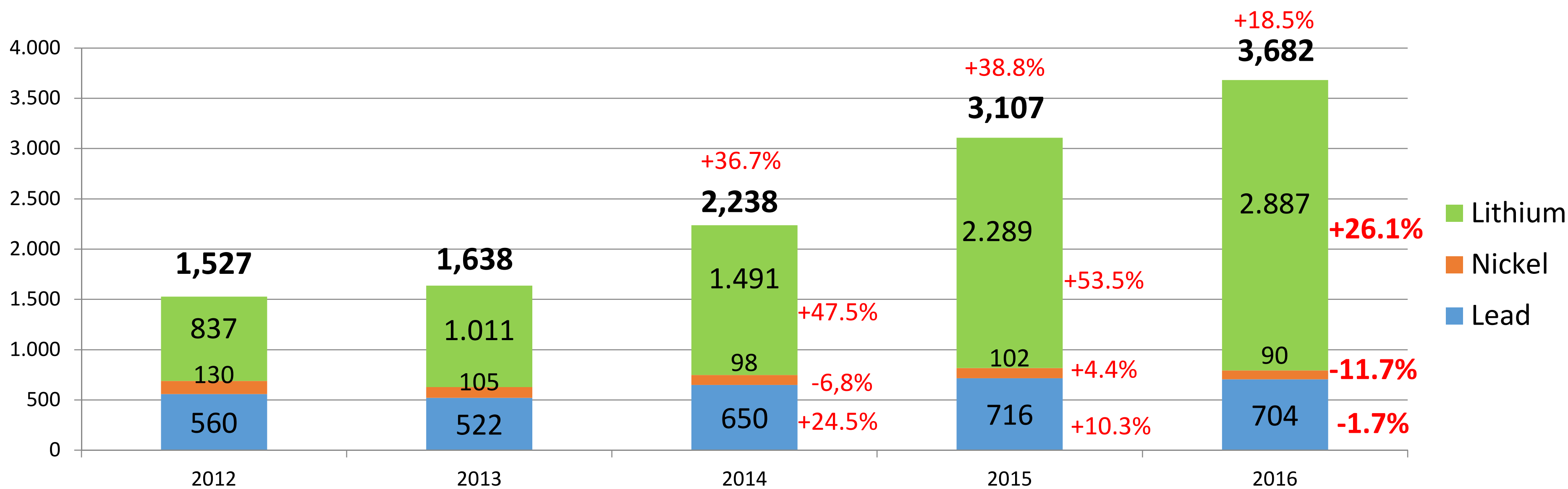
Trend 2015-2016: + 5%

Lift truck market ↑

IBC Internal surveys:
- Lead-based batteries: twice a year / 10 participants
- Non-lead batteries: yearly / 6 participants
- Sample universe: EMEA - 72 countries:
  39 in Europe, 15 in Middle East and 18 in Africa

Evolution of Battery Imports Into EU 28 (in M€)

Source: Eurostat



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