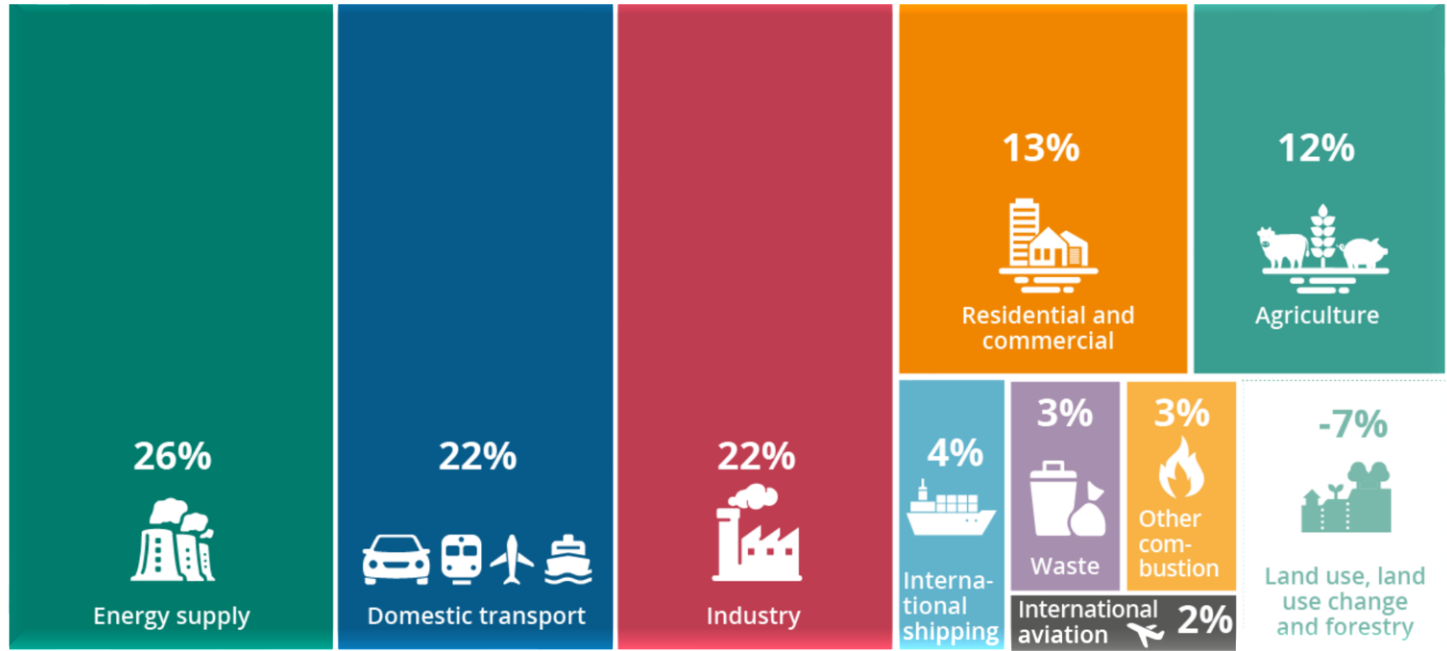




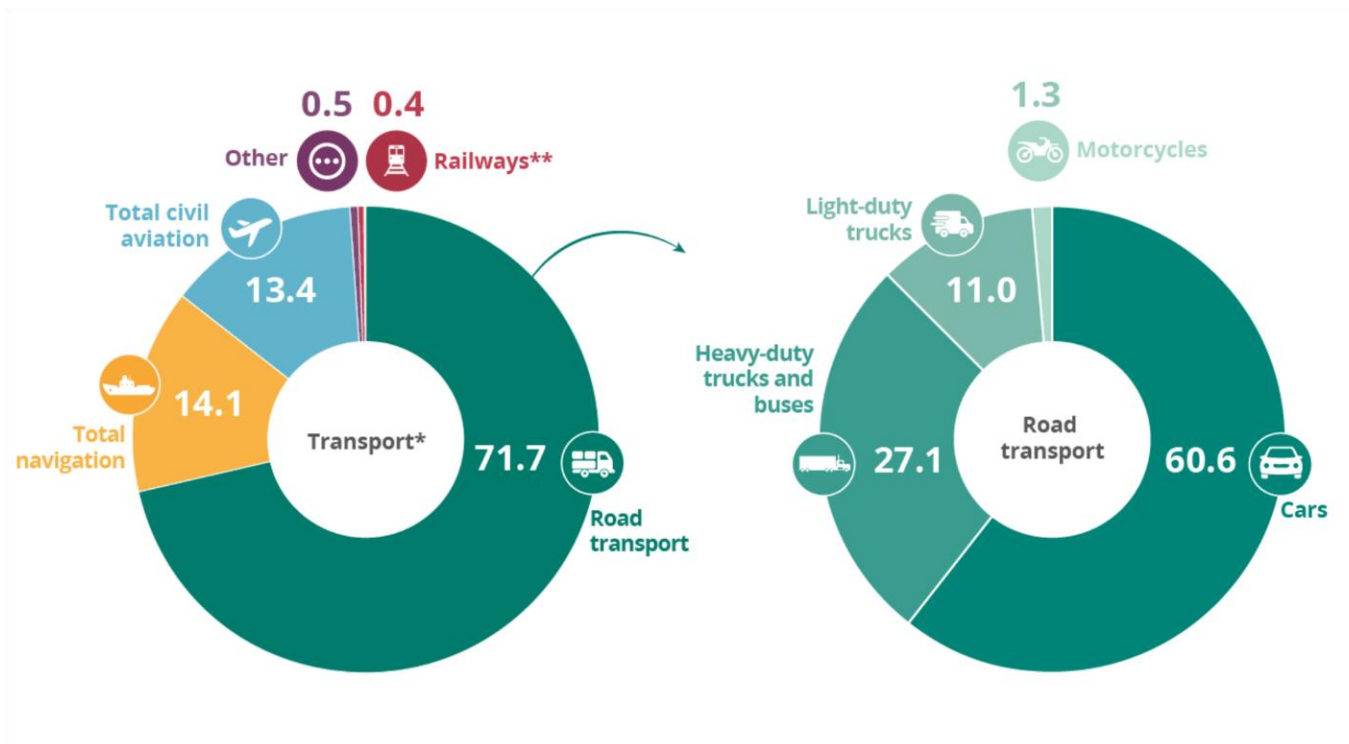
FUTURE of LEAD BATTERIES for AUTOMOTIVE APPLICATION

ELBC Milan/Italy 2024

Sources of Greenhouse Gas Emissions in the EU



Greenhouse Gas Emissions from Transport in the EU



CO₂ Reduction Targets in EU

CO₂ Reduction Target for Passenger Car(%)

2025

15%

2030

55%

2035

100%



CO₂ Reduction Target for Light Commercial Vehicle (%)

2025

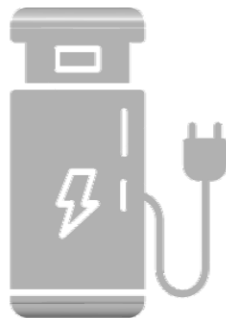
15%

2030

50%

2035

100%



2035 xEV New Vehicle Number

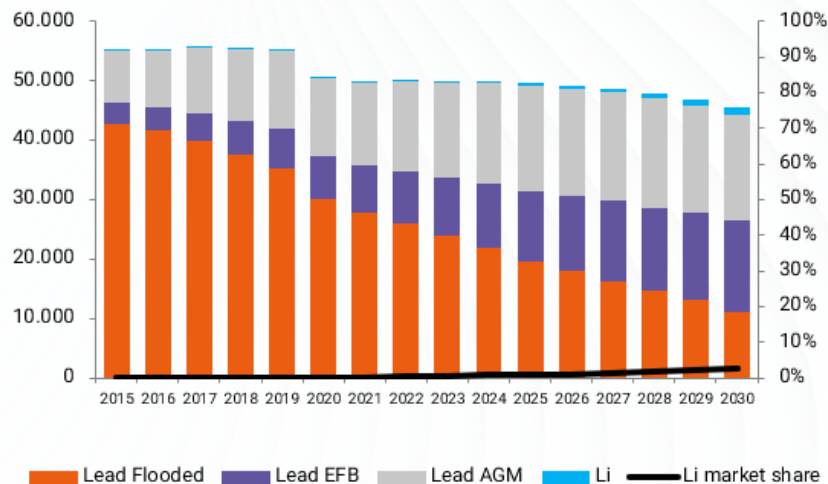


The total xEV market is expected to grow, reaching 80 million units by 2035

12V SLI and Auxiliary Battery Market in Europe

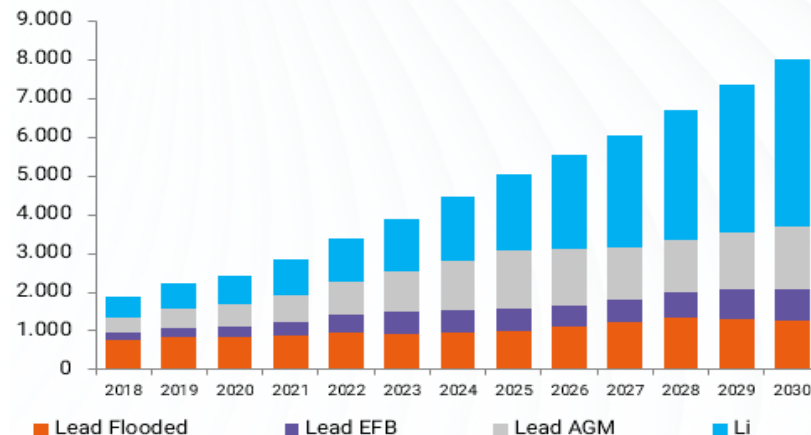
12v automotive SLI BATTERIES in Europe 50 GWh / 2022

SLI battery market (MWh) CAGR 2020-30: -1%



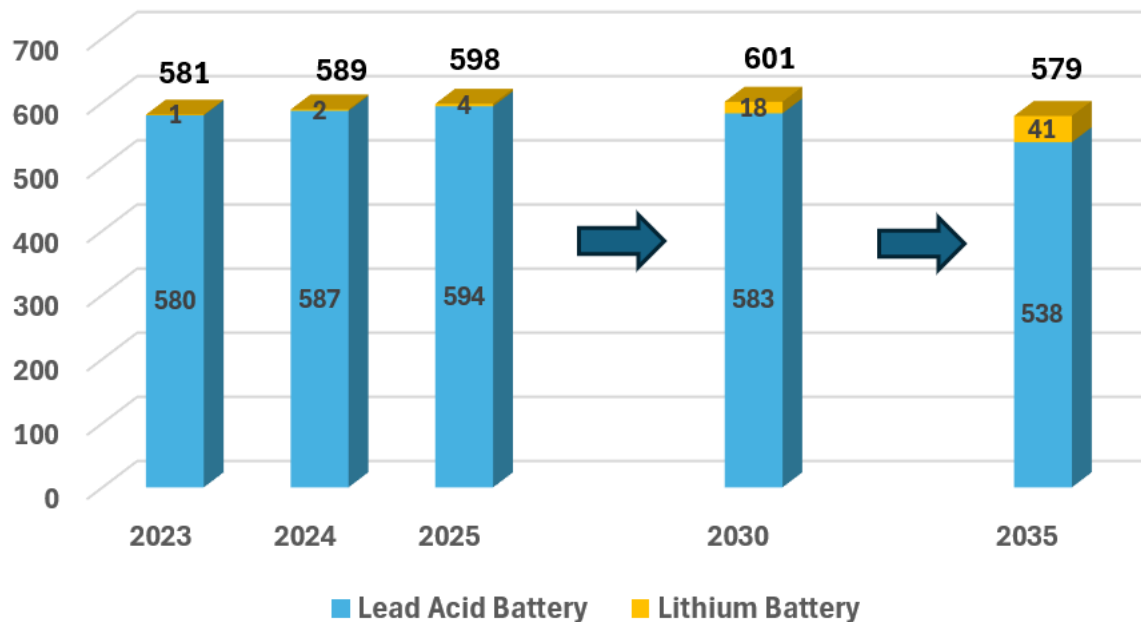
12v AUXILIARY BATTERIES (all drive trains) 3.4 GWh / 2022

Auxiliary battery market (MWh)
CAGR 2020-30: +13%



Global Automotive Battery Demand Forecast for 12V Systems

Estimated demand for 4-wheel drive starting and auxiliary batteries (million units)



- Electric vehicles often use lead-acid batteries as auxiliary batteries, so it's unlikely that demand for lead-acid batteries will decrease rapidly.
- In addition to the electrification of vehicles, increases or decreases in battery demand will also depend on factors such as population (number of people with driver's licenses), each country's infrastructure, and policies.

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TEŞEKKÜRLER / THANK YOU / ありがとうございます。

