

# Exide Training Graphic Assets

## Module 09 | Battery Aftermarket

Edition 2  
Revised 05.2021

# Introduction

## Module 09 | Battery Aftermarket

### Exide Lead-Acid Batteries Training Modules

- Module 01 | Lead-Acid Battery Basics
- Module 02 | Battery Evolution and the Environment
- Module 03 | (LV) Light Vehicle Batteries
- Module 04 | (CV) Commercial Vehicle Batteries
- Module 05 | (MC) Motorcycle Batteries
- Module 06 | (ML) Marine Leisure Batteries
- Module 07 | Battery Testing and Installation
- Module 08 | Battery Handling, Storage and Recycling
- Module 09 | Battery Aftermarket

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# European Vehicle Parc

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### Light Vehicle Parc < 3.5 t



		,000 units
1	Germany	50,511
2	France	44,244
3	Italy	43,718
4	United Kingdom	39,696
5	Spain	28,795
6	Poland	27,093
7	Netherlands	9,960
8	Romania	7,713
9	Belgium	6,613
10	Czech Republic	6,577
11	Portugal	6,340
12	Greece	6,154
13	Austria	5,480
14	Sweden	5,473
15	Switzerland	4,964
	Others	25,458
	<b>Total</b>	<b>318,789</b>

EU27 +  
Iceland, Norway,  
Switzerland & UK

**319m**

#### Other significant markets

Russia	48,694
Turkey	16,973
Ukraine*	11,121

Source:

European Automobile Manufacturers' Association (ACEA)  
2019 (\*2016 data)

### Commercial Vehicle Parc > 3.5 t



		,000 units
1	Poland	1,273
2	Germany	1,092
3	Italy	1,047
4	France	695
5	United Kingdom	690
6	Spain	669
7	Romania	322
8	Greece	255
9	Czech Republic	209
10	Netherlands	181
11	Belgium	164
12	Portugal	149
13	Hungary	116
14	Finland	108
15	Norway	102
	Others	715
	<b>Total</b>	<b>7,787</b>

EU27 +  
Iceland, Norway,  
Switzerland & UK

**7.8m**

#### Other significant markets

Russia	4,151
Turkey	1,058
Ukraine*	1,714

Source:

European Automobile Manufacturers' Association (ACEA)  
2019 (\*2016 data)

### Motorcycle/Moped Parc



		,000 units
1	Italy	8,721
2	Germany	6,221
3	Spain	5,393
4	France*	3,034
5	Poland	2,853
6	Netherlands	1,697
7	Greece	1,583
8	United Kingdom	1,265
9	Czech Republic	1,132
10	Switzerland	941
11	Austria	847
12	Belgium	664
13	Finland	648
14	Portugal	616
15	Sweden	386
	Others	1,801
	<b>Total</b>	<b>37,784</b>

EU27 +  
Iceland, Norway,  
Switzerland & UK

**38m**

#### Other significant markets

Russia	2,375
Turkey	3,276

Source:

European Association of Motorcycle Manufacturers (ACEM)  
2016 (\*2017 data), Autostat (Russia) 2018, Motorcycle Industry  
Association of Turkey (MOTED) 2019

### Motorhome/Caravan Parc



		,000 units
1	Germany	1,288
2	France	1,065
3	United Kingdom	780
4	Netherlands	556
5	Sweden	390
6	Spain	300
7	Italy	299
8	Norway	174
9	Poland	149
10	Denmark	135
11	Finland	125
12	Belgium	100
13	Switzerland	100
14	Austria	69
15	Czech Republic	40
	Others	113
	<b>Total</b>	<b>5,683</b>

EU27 +  
Iceland, Norway,  
Switzerland & UK

**5.7m**

#### Other significant markets

Russia	1,121
Turkey	1,121

Source:

European Caravan Federation (ECF) 2018

### Boat Parc



		,000 units
1	Sweden	781
2	Norway	758
3	Finland	710
4	Italy	510
5	United Kingdom	500
6	France	485
7	Netherlands	408
8	Germany	404
9	Denmark	310
10	Spain	174
11	Greece	135
12	Croatia	104
13	Switzerland	85
14	Austria	65
15	Poland	35
	Others	196
	<b>Total</b>	<b>5,660</b>

EU27 +  
Iceland, Norway,  
Switzerland & UK

**5.7m**

#### Other significant markets

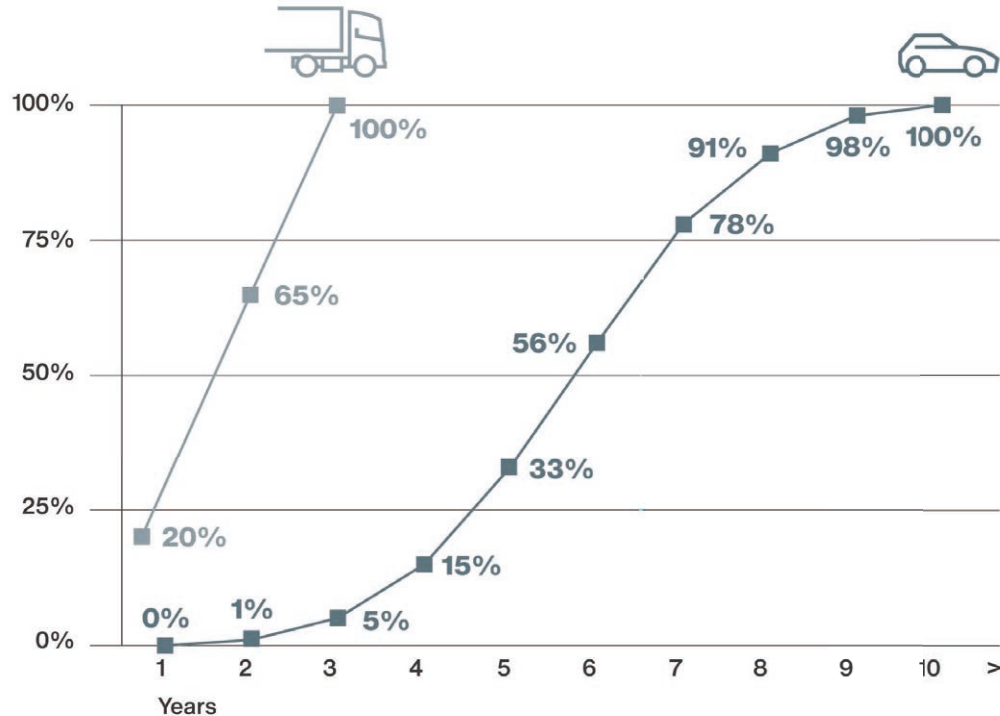
Turkey	72
Russia	30
Ukraine	15

Source:

International Boat Industry (IBI) 2015

# Average battery life

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### Light vehicles' replacement cycle

(average 1 battery per vehicle)

- Minimal battery replacement in the first three years
- More than 50% of batteries replaced by the sixth year
- 100% of batteries replaced within ten years

### Heavy vehicles' replacement cycle

(average 1.7 batteries per vehicle)

- 20% of batteries replaced within the first year
- 65% of batteries replaced within the second year
- 100% of batteries replaced within three years

Source: Eurobat Study (The availability of automotive lead-based batteries for recycling in the EU)

# Average age of European vehicles

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	Cars	Vans	Trucks
European Average (years)	11.5	11.6	13.0
Austria	◀ 8.3	◀ 6.2	◀ 6.4
Belgium	◀ 9.1	◀ 8.6	15.8 ▶
Croatia	14.6 ▶	12.0 ▶	14.4 ▶
Czech Republic	14.9 ▶	12.9 ▶	17.2 ▶
Denmark	◀ 8.8	◀ 8.1	◀ 10.2
Estonia	16.7 ▶	15.5 ▶	18.0 ▶
Finland	12.2 ▶	12.8 ▶	13.9 ▶
France	◀ 10.2	◀ 10.4	◀ 9.3
Germany	◀ 9.6	◀ 8.1	◀ 9.5
Greece	16.0 ▶	19.5 ▶	21.2 ▶
Hungary	13.5 ▶	11.8 ▶	◀ 11.2
Ireland	◀ 8.4	◀ 8.8	◀ 10.4
Italy	◀ 11.4 ▶	12.6 ▶	14.3 ▶
Latvia	14.0 ▶	◀ 10.9	◀ 12.7

	Cars	Vans	Trucks
European Average (years)	11.5	11.6	13.0
Lithuania	16.8 ▶	11.7 ▶	◀ 10.3
Luxembourg	◀ 6.5	◀ 6.2	◀ 6.7
Netherlands	◀ 11.0	◀ 9.8	◀ 9.6
Norway	◀ 10.7	◀ 9.1	◀ 12.0
Poland	14.1 ▶	13.6 ▶	◀ 12.2
Portugal	12.8 ▶	14.5 ▶	14.9 ▶
Romania	16.5 ▶	16.3 ▶	16.1 ▶
Slovakia	14.0 ▶	13.8 ▶	13.1 ▶
Slovenia	11.7 ▶	◀ 9.2	◀ 9.4
Spain	12.7 ▶	13.0 ▶	14.7 ▶
Sweden	◀ 10.0	◀ 8.4	◀ 8.7*
Switzerland	◀ 8.6	◀ 8.0	◀ 9.0
United Kingdom	◀ 8.0	◀ 7.8	◀ 7.3

EU27 + UK.  
Data not available for Bulgaria, Cyprus & Malta.

◀ = Below average    ▶ = Above average

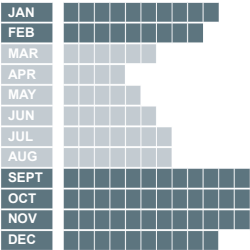
Source: European Automobile Manufacturers' Association (ACEA) 2019 \*2017 data

# Seasonal Battery Sales

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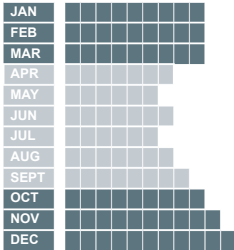


## Light Vehicle Seasonal Battery Sales



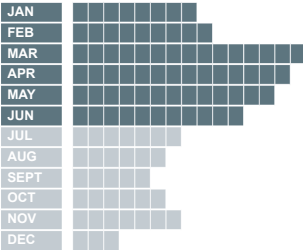
Peak sales period  
September to February

## Commercial Vehicle Seasonal Battery Sales



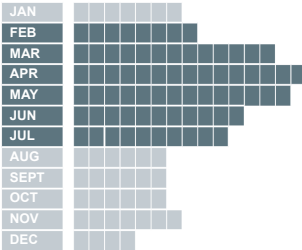
Peak sales period  
October to March

## Motorcycle & Powersport Seasonal Battery Sales



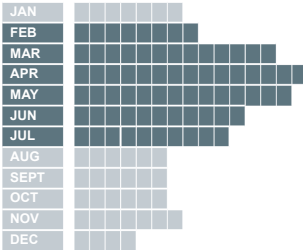
Peak sales period  
January to June

## Motorhome/Caravan Seasonal Battery Sales



Peak sales period  
February to July

## Boat Seasonal Battery Sales



Peak sales period  
February to July

# High demand for leisure vehicles during pandemic

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**During Covid-19 pandemic registrations of new leisure vehicles have significantly increased**

Registrations of new leisure vehicles  
Highest % change 2019-2019

Spain	+ 25.3%
Slovenia	+ 24.8%
Portugal	+ 23.3%
Germany	+ 13.6%
Switzerland	+ 13.2%
Denmark	+ 12.4%

Source: European Caravan Federation (ECF)





# Exide Technical Guide Lead-Acid Batteries

Exide Technologies has been at the forefront of Lead-Acid battery innovation since 1880 to the current day. The company was the inventor of the world's first starter battery in 1912 and more recently the first manufacturer to introduce AGM and EFB battery technology into the European aftermarket.

Exide's expertise and knowledge enabled the publication of the easy-to-understand Exide Technical Guide. The latest edition is available to view and download as a PDF at:

[www.exidegroup.media/techguide](http://www.exidegroup.media/techguide)

