



North American lead battery outlook

Battery Council International

Jeff Reeves | Vice President, Communications and Marketing

jreeves@battery council.org



BCI - Serving the Industry Since 1924

Members include **manufacturers, recyclers, suppliers, distributors, retail, marketers, and consultants.**
Our work touches every lead battery company that **does business** in North America.

140+ Members

\$33 billion+
member footprint

Manufacturers: Battery Builders, Bulldog Battery, Bosch, Clarios, Crown, C&D/Trojan, East Penn Manufacturing, EnerSys, Enerya (Gohner), Leoch, Moura, Stryten Energy, Surrrette, U.S. Battery, Yuasa, & more

Recyclers: Clarios, Corporacion Pipsa, East Penn, Ecobat, Element Resources, Gopher Technologies, M3 Resources, Sanders, Teck, Terrapure, & more





North America's battery industry includes

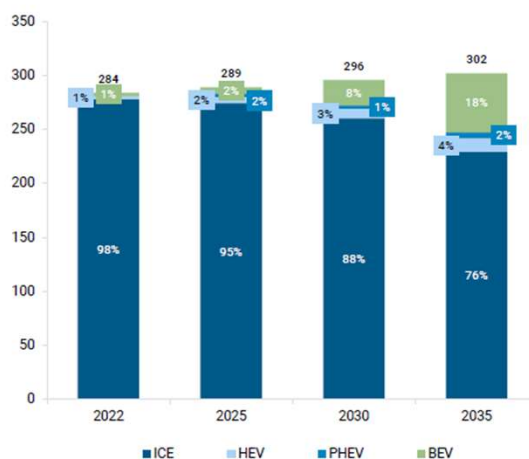
-  **SLI and low-voltage applications** in automotive, marine, and power sports

-  **Motive power** in industrial and material handling equipment

-  **Stationary storage** for local backup power, grid-scale support and UPS

-  **Next-gen energy research**, from AGM to flow, sodium, zinc, and lithium.

U.S. vehicle marketplace statistics



Old cars need replacement batteries.

There are +290 million registered motor vehicles with an average age of 12.5 years... 42% are 12+ years old.

95% of those vehicles are ICE. And five years from now, 88% will be ICE.

As a result... the business of lead batteries is good. CAGR is +2-3%, proving not just stability but growth.

More statistics on U.S. Lead Battery Market



160+ million units annually



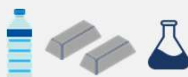
~6.4 billion lbs of used
batteries per year
2023 BCI Recycling Rate Study
(2.58 million metric tonnes)



300,000+ retail
collection partners



9 US Recyclers
5+ partner facilities in Canada + Mexico



99% end-of-life recycling
100% recycling of collected batteries

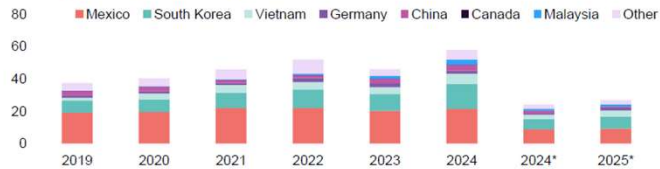


85% of North American lead
demand met through recycling

Statistics on U.S. Lead Battery Market

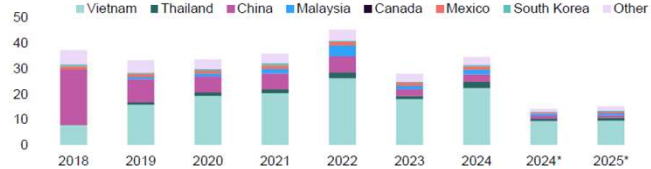
Automotive battery imports have been running higher through early 2020s

United States Imports of automotive batteries (Million units)



Reliance on Chinese industrial batteries shifts to Vietnamese from 2018

United States Imports of industrial batteries (Million units)

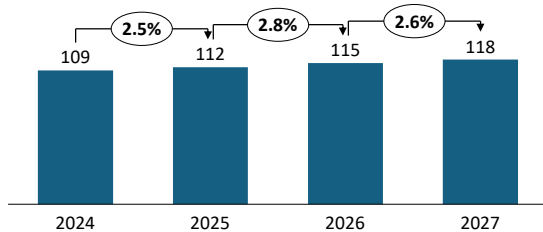


While tariffs have created uncertainty, the long-term trends shows key trade relationships...

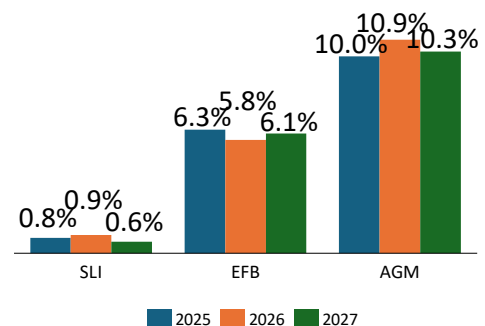
- China
- Malaysia
- Vietnam
- Thailand
- South Korea

BCI Member Survey – 3-Year Automotive Forecast

North America Shipment Forecast (M Units)



Forecasted % Growth by Technology



Regulatory and legislative outlook

After a major package that included 45X credits, industry issues take a back seat

- **Foundational bills:** Comprehensive legislation remains incomplete, including budget and farm bill
- **Limited agency staffing and influence:** Our partners at DOE continue to face challenges
- **Sustainability is not a priority:** Administration shows lack of interest in green energy
- **Current environment avoids new regulation:** Lack of change provides a rare bit of certainty

In such an environment, BCI messaging stresses

- **Essential:** Batteries are critical in areas ranging from transportation to logistics to national security
- **Safety:** Industry-led EHS standards protect workers and communities
- **Economic impact:** BCI study: U.S. lead battery industry = 106,050 Jobs and \$35 billion in economic output

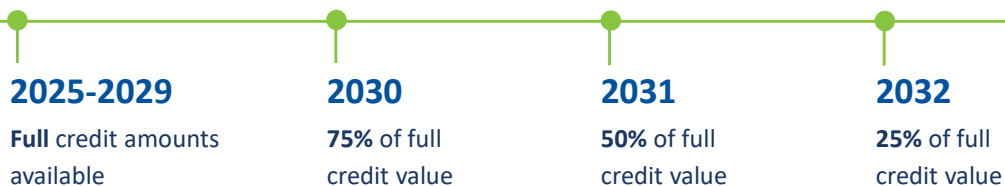
Current incentives for battery companies

Federal battery component credits (45X)

- **Battery Cells:** \$35 per kilowatt-hour of capacity
- **Battery Modules (with cells):** \$10 per kWh capacity
- **Battery Modules (without cells):** \$45 per kWh capacity
- **Electrode Active Materials:** 10% of production costs incurred



Credit Phase-Out Timeline

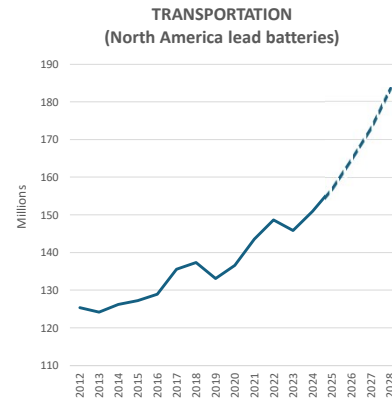


Now is a great time to invest in North America!

Production capacity growing - Now 206 GWh across North America, including 165 GWh in the United States

Funding is plentiful - Roughly \$1.5B to \$2B in in capital coming available thanks to 45X

CAPEX is growing - BCI members have committed roughly \$850 million in future production



What's next for BCI

- **Application-focused advocacy:** Content includes **military** use of lead batteries and **grid/stationary storage**
- **Data-driven analysis:** Statistics from first-ever **lead battery market report**, forthcoming **recycling rates**
- **BCI Convention + Power Mart Expo:** Join us **May 3-6, 2026** in Nashville, Tennessee

bci 2026
CONVENTION + POWER MART EXPO

CRU Data, Insight, Strategy & Communities

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SINCE 1924

Lead market braces for change as technology advances and tariffs bite

CRU, independent expert intelligence

CRU x BCI report 2025

REPORT

bci BATTERY COUNCIL INTERNATIONAL
SINCE 1924

The essential role of energy storage for critical U.S. military applications

