

## 2028년까지의 차량용 납축전지 글로벌 시장 전망 - COVID-19 영향 분석, 제품별 (SLI, 마이크로 하이브리드 배터리), 종류별(개방형 배터리, 발전된 개방형 배터리, VRLA), 최종소비자별(승용차, LCV, MCV, HCV) 분석

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### 개요

차량용 납축전지 시장 규모 2020년 US\$ 168억6천5만 기록한 후 2021년부터 연평균성장률 3.1%를 보이며 2028년까지 US\$ 236억6천8백만 도달 예상.

차량용 납축전지 시장의 성공은 자동차 산업의 성과와 밀접한 연관이 있다. 자동차 산업이 성장할 때 차량용 납축전지 시장도 상호보완적으로 성장한다고 볼 수 있다. 차량 섹터에서의 수요가 증가하면서 추후 납축전지 시장의 트렌드 또한 이어질 것으로 보인다. 납축전지는 주로 자동차의 SLI(Starting, Lighting, Ignition) 배터리에 사용된다. 승용차, 경상용차를 포함한 물류 관련 특수목적 차량의 생산이 증가하면서 향후 해당 산업이 더욱 발전할 것으로 예측된다. 전보다 더 개선된 안전성과 발전된 내비게이션 시스템을 갖춘 복합 차량의 점유율이 증가함에 따라 해당 산업의 공유 경제 확산에 긍정적 영향을 미치고 있다. 미국과 중국은 진화하고 있는 자동차 섹터의 선두주자이다. 현재 12V 배터리 공급은 납 기반 배터리 기술에 의존하고 있다. 매년 글로벌 경상용차 시장에서는 OEM 기준과 유통시장의 요구에 부합하는 4억 개가 넘는 12V 납 기반 배터리들이 제조되고 있으며, 현재 유럽에서만 연간 6천만 개가 넘는 배터리 수요가 발생하고 있는 상황이다. 결과적으로, 차량용 납축전지 시장은 향후 예측 기간동안 지속적으로 성장할 것으로 보여진다.

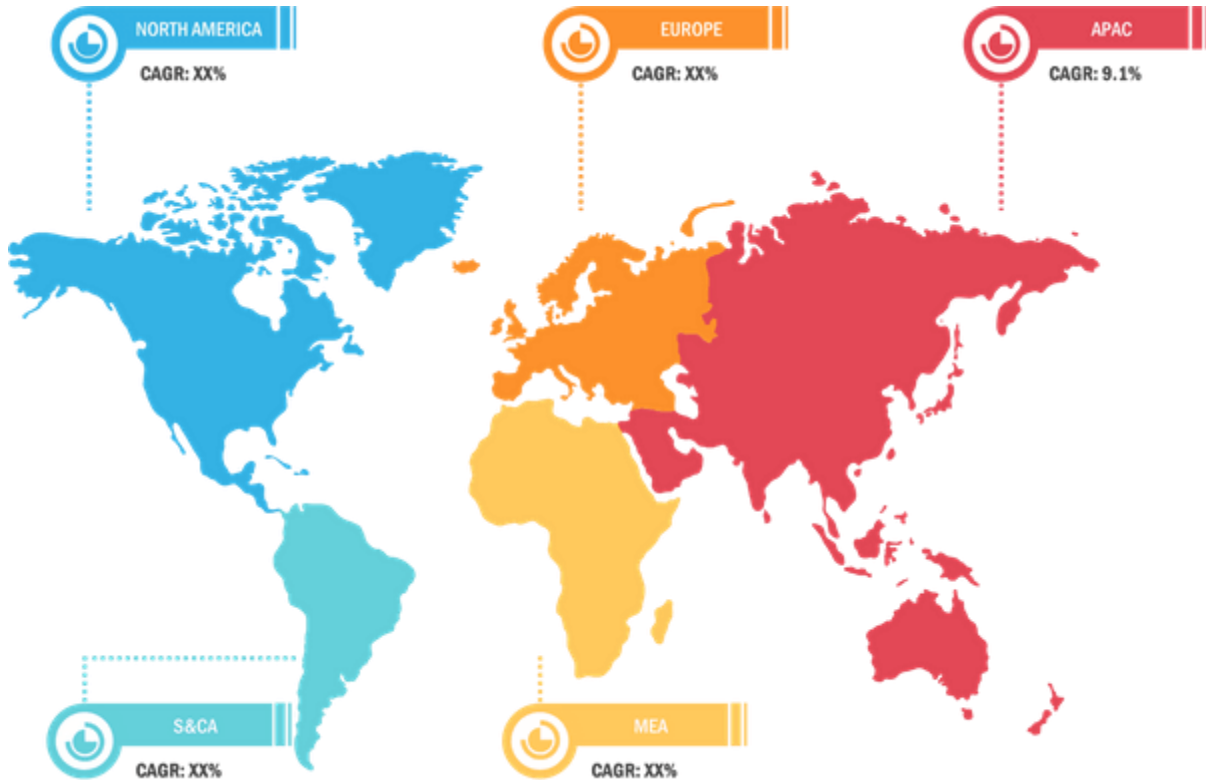
아시아태평양 지역은 2020년 납축전지 시장을 주도했다. 아시아 지역의 많은 인구와 대량의 프리미엄 차량(세단, SUV 등)의 도입이 맞물려 해당 지역의 시장 점유율 증가에 크게 공헌한 것으로 보인다. 더불어, Holden, Toyota, Ford, Mitsubishi, Isuzu, 현대, Volkswagen은 호주 내에서 상업용 차량 제조를 주도하고 있다. 위 제조사들은 모두 소비자의 새로운 요구에 맞게 차량과 납축전지의 일체화를 시도하고 있다. 자동차 제조 공정의 가속화, 전기자동차의 수요 증가, 가격 효율적인 배터리의 증가는 향후 예측기간동안 아시아 납축전지 시장 발전의 원동력이 될 것으로 예측된다.

### COVID-19의 시장 영향

코로나 사태는 차량용 납축전지뿐만 아니라 전자장비의 생산과 공급 과정에 심각한 지장을 주었다. 팬데믹 상황으로 발전하게 되면서, 자동차 산업 전문가들은 자동차 관련 장비 공급 과정에 최소 한 분기의 지연이 생길 것이라고 2021년 중반까지 여파가 이어질 것이라고 분석했다. 전자장비와 자동차 산업은 세계 정부가 경제부흥을 위한 확장방지조치를 마련하면서 다시 안정을 찾을 것으로 보인다. 전자장비와 자동차 산업은 2022년부터 다시 활기를 찾을 이후 자동차, 전자장비, 납

축전지 제조에 긍정적인 영향을 끼칠 것으로 예상된다.

### 차량용 납축전지 시장의 수혜 지역



### 마일드 하이브리드 자동차 점유율 증가 분석

세계는 하이브리드 자동차 점유율 급증을 목격하고 있다. 각 국 정부가 엄격한 탄소배출 기준을 적용하면서, 제조업자와 정부는 높은 연비의 하이브리드 차량 사용을 장려하는 전략적 움직임을 보이고있다. 정부는 EVI 멤버십, EV30@30 캠페인, EVI-PCP 프로그램, FAME-I, 운송체계와 배터리 제조의 국제 의무화, NEMMP, 단계화된 제조공정 프로그램 등의 지원제도를 통해 하이브리드 차량을 비롯한 차세대 운송수단 사용을 독려하고 있다.

또한, 다수의 차량제조사들이 마일드 하이브리드 자동차 개발에 상당한 투자를 이어가고있다. 대표적으로, 마일드 하이브리드 차량의 선도주자인 Volkswagen은 2019년 새로운 자동차 모델 출시와 더불어 8세대 Golf의 48V 마일드 하이브리드버전을 선보인 바 있다. 동년 Ford는 유럽시장을 겨냥하여 피에스타 에코부스트 하이브리드 모델을 공개했다. 이러한 마일드 하이브리드 차량의 등장은 차량용 납축전지의 수요를 증가시키고있다.

### 제품에 따른 시장 분석

제품에 따라 글로벌 차량용 납축전지시장은 SLI와 마이크로 하이브리드 배터리로 세분화된다. 2020년 기준으로 두 제품 중 SLI가 더 높은 시장점유율을 보였다. SLI 배터리는 재충전가능한 납축전지로, 다양한 차량에 사용된다.

### 종류에 따른 시장 분석

종류에 따라 차량용 납축전지 시장은 개방형(Flooded) 배터리, 발전된 개방형 배터리, VRLA로 분류된다. 개방형 납축전지 배터리는 내부에 유동적으로 이동이 가능한 전해액을 포함하고 있다. 해당 배터리는 충전이 완료된 후에 다른 납축전지 배터리들 중 시간당 최저 수준의 암페어 소비를 기록했다.

### 최종사용자 기준 시장 분석

최종사용자 기준으로 차량용 납축전지 시장은 승용차, LCV, MCV, HCV로 분류된다. 승용차는 화물을 적재할 공간이 부족하며 제한된 좌석(9명 이하)을 지닌 자동차를 기준으로 하였다. 최신 SLI 배터리는 6개의 연결된 전지를 이용하여 다수의 12V 전용 승용차에 사용된다.

### 최신 주요 개발 동향

- 2020년 일본의 GS Yuasa는 영국의 에너지회사인 Infinite Renewables와 파트너십을 체결한 후 Albion Community Power와 합작하여 Yuasa의 하이브리드 납/리튬 배터리를 풍력과 태양열로 재생산 가능하게 만들었다.
- 2018년 중국의 Leoch International Technology Limited는 다수의 수상을 기록했다. 수상 내역으로는 중국 납축전지산업 선진사업체상, 중국 납축전지산업 품질 5대 기업상, 소비자브랜드상, 산업리더상 등이 있다.

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[Automotive Lead Acid Battery Market Forecast to 2028 - COVID-19 Impact and Global Analysis By Product \(SLI and Micro Hybrid Batteries\), Type \(Flooded, Enhanced Flooded, and VRLA\), and End-user \(Passenger Car, LCV, and MCV and HCV\)](#)

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### **Overview**

The success of the automotive lead-acid battery market is closely tied to the performance of the automotive industry. Thus, if the automotive industry is growing, the automotive lead-acid battery market will increase as well, and vice versa. This trend of lead acid batteries is projected to continue in the coming years due to their continued use in the vehicle sector. These batteries are used in automobiles for starting, lighting, and ignition (SLI). Rise in passenger car and light commercial vehicle production, as well as the vehicle parc (on-the-road fleet), are predicted to aid the industry's development during the next several years. In addition, the rising penetration of sophisticated cars integrated with advanced safety and navigation systems is creating a positive consequence on sharing concepts. Economies like the US and China are the leading markets when it comes to evolving automotive sector. At present, commercial 12V battery technology depends on lead-based chemistries. More than 400 million 12V lead-based batteries are manufactured annually to cater to the needs of both OEMs and aftermarket related to light-duty vehicle applications globally. Europe is experiencing demand for more than 60 million batteries yearly. As a result, the automotive lead acid battery market is likely to grow throughout the forecast period.

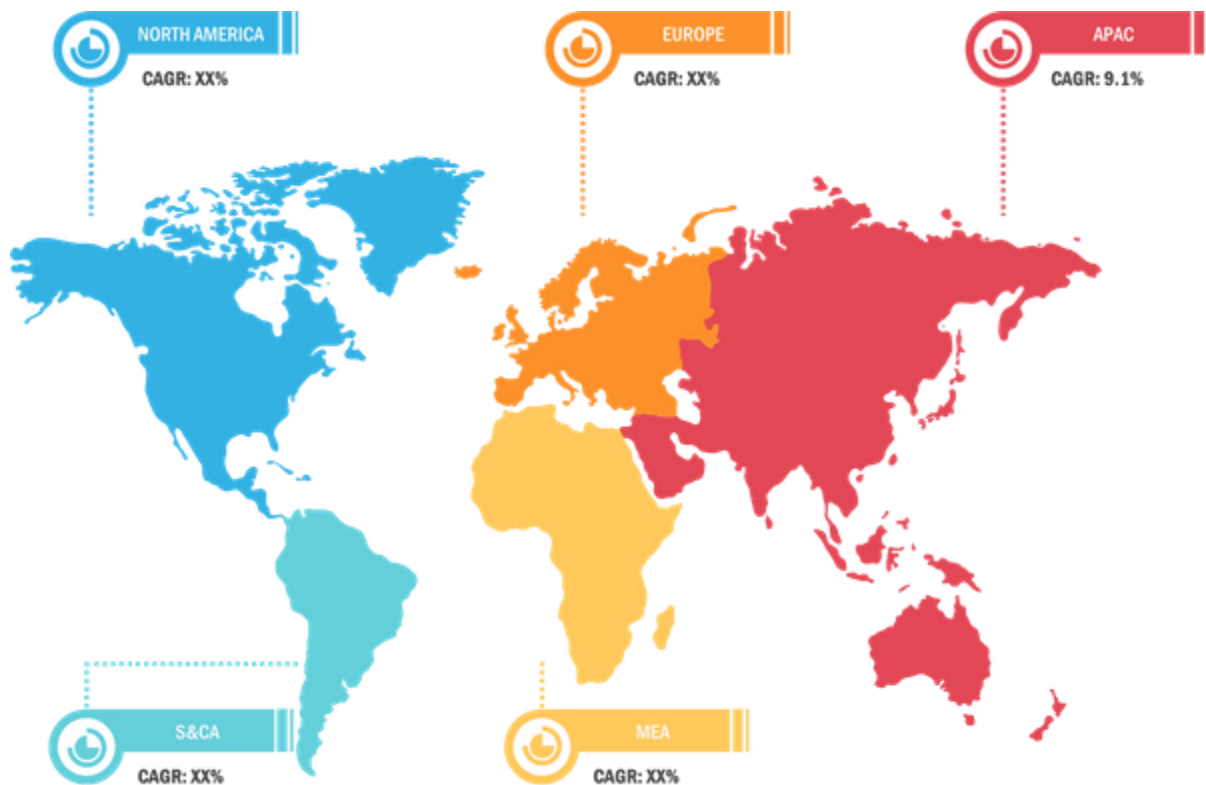
APAC dominated the [automotive lead acid battery market](#) in 2020. Factors such as extensive adoption of premium cars, sedans, and SUVs among the APAC population contribute significantly to the region's major market share. Further, General Motors Holden, Toyota Motor Corporation Australia Limited, Ford Motor Company of Australia Limited, Mitsubishi Motors Australia Ltd. (MMAL), Isuzu Australia Limited, Hyundai Commercial Vehicles Australia, and Volkswagen Group Australia Pty Ltd. are among the well-known manufacturers of commercial vehicles in the country. All these manufacturers are demanding the integration of automotive lead acid batteries in the cars to meet the emerging requirements from the customers. Moreover, escalating automotive manufacturing operations, rising demand for electric vehicles, and growing focus of the automotive lead acid battery manufacturers toward offering low-cost and high-efficiency products is expected to drive the automotive lead acid battery's market in the Rest of APAC countries during the forecast period.

### **Impact of COVID-19 Pandemic on Automotive Lead Acid Battery Market**

The COVID-19 outbreak has severely disrupted the supply chain and manufacturing of electronics equipment, including the hardware component of automotive lead acid batteries. The emergence of COVID-19 virus across the globe, followed by lockdown scenarios, has led the automotive industry experts to analyze that the industry would face at least a quarter of lag in automotive equipment supply

chain. This disruption is expected to create tremors through till mid-2021. The electronics equipment and automotive industry is likely to pick up pace soon after the governments across the globe lift the various containment measures steadily in order to revive the economy. The production of the electronics equipment and automotive is anticipated to gain pace from 2022, which is further foreseen to positively influence the electronics equipment and automotive manufacturing, including hardware components of automotive lead acid batteries.

### Lucrative Regions for Automotive Lead Acid Battery Market



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### Market Insights

#### Rising Adoption of Mild Hybrid Vehicles

The world is witnessing a proliferation in the adoption of hybrid vehicles. Due to the formulation of stringent emission standards by government to protect environment, while boosting fuel efficiency, both automotive manufacturers and government are making a strategic move toward promoting the use of





hybrid vehicles. EVI Membership, EV30@30 campaign, EVI Global EV Pilot City Programme (EVI-PCP), FAME-I and II, National Mission for Transformative Mobility and Battery Manufacturing, National Electric Mobility Mission Plan, and Phased Manufacturing Program are among the government initiatives promoting the use of next generation of mobility. These initiatives are contributing toward fostering the adoption of hybrid vehicles.

In addition, there are numerous automotive manufacturers making significant investments in developing mild hybrid vehicles. The auto manufacturers have initiated the introduction of 48V mild hybrid among a standard feature in new vehicle models. Volkswagen, which is one of the key players in mild hybrid vehicles, unveiled 48V mild hybrid version of 8th generation Golf in 2019. In the same year, Ford revealed Focus EcoBoost Hybrid & Fiesta EcoBoost Hybrid vehicle models to cater to the European market. Introduction of such mild hybrid vehicles into the market is driving the adoption of lead acid batteries for automotive applications.

### **Product-Based Market Insights**

Based on product, the global automotive lead acid battery market is segmented into SLI and micro hybrid batteries. In 2020, the SLI segment accounted for a larger market share. SLI battery is a rechargeable lead acid battery, and it is widely used in several kinds of automobiles.

### **Type-Based Market Insights**

Based on type, the automotive lead acid battery market is segmented into flooded, enhanced flooded, and VRLA. Flooded lead acid battery includes an electrolyte which is free to move around inside the battery encasement. After getting charged, the lead plates and battery acid react to store electricity. These batteries offer the least cost per amp hour among various types of lead acid batteries.

### **End User-Based Market Insights**

Based on end user, the automotive lead acid battery market is segmented into passenger car, LCV, and MCV and HCV. Passenger car is a road vehicle used for carrying passengers with limited seating capacity (not more than 9 people). Modern SLI batteries use six connected cells and provide 12-volt system in many passenger cars.

### **Strategic Insights**

Product development is the commonly adopted strategy by companies to expand their product portfolio. Clarios; Exide Industries Limited; GS Yuasa International Ltd; Johnson Controls, Inc.; and Panasonic Corporation are among the key players implementing various strategies to increase the customer base and gain significant share in the global automotive lead acid battery market, which, in turn, permits them to maintain their brand name.

**A few of the recent key developments are:**

- In 2020, GS Yuasa International Ltd. extended partnership with Infinite Renewables to create UK's local energy centers. They were launching a project with Albion Community Power to integrate Yuasa's hybrid lead/lithium battery system with renewable wind and solar power sources.
- In 2018, leoch International Technology Limited Inc won a number of titles. The company won 2017 China Lead-Acid Battery Industry Advanced Collective, 2017 China Lead-Acid Battery Industry Quality Five-Star Enterprise, 2017 China Lead-acid Battery Industry Famous Brand in 2017, 2017 China Lead-acid Battery Industry Leader, and 2017 China Lead-acid Battery Industry Outstanding Entrepreneur, among others.

**Automotive Lead Acid Battery Market Segmentation:**

- **By Product**
  - SLI
  - Micro Hybrid Batteries
- **By Type**
  - Flooded
  - Enhanced Flooded
  - VRLA
- **By End-user**
  - Passenger Car
  - LCV
  - MCV and HCV

**Company Profiles**

- Clarios
- CSB Energy Technology Co.
- East Penn Manufacturing Company
- ENERSYS.
- EXIDE INDUSTRIES LTD
- GS Yuasa International Ltd.
- Johnson Controls.
- KOYO BATTERY CO., LTD
- leoch International Technology Limited Inc
- Panasonic Corporation

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□ 보고서 문의

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