

## **SLI Battery Market Size and Share Outlook - Forecast Trends and Growth Analysis Report (2025-2034)**

Market Report | 2025-08-12 | 169 pages | EMR Inc.

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### **Report description:**

The global SLI battery market value reached around USD 8.91 Billion in 2024 driven by the growing demand for vehicles. The continuous increase in vehicle production, especially conventional internal combustion engine vehicles, significantly contributes to the demand for SLI batteries, which are essential for starting, lighting, and ignition functions. Additionally, the expansion of the commercial vehicle sector and rising vehicle ownership rates in emerging economies further enhance market prospects. As a result, the industry is expected to grow at a CAGR of 3.90% during the forecast period of 2025-2034 to attain a value of USD 13.06 Billion by 2034. The increasing adoption of SLI batteries in marine and recreational vehicles, coupled with stringent regulations promoting energy efficiency, is also expected to fuel market growth.

### SLI Battery Market Growth

SLI Battery (starting, lighting, and ignition) is a form of rechargeable battery which has a lead-acid combination. It is generally considered to be a high power-expending battery with a life of between 3-6 years. The usual configuration in this type of batteries is with 6 cells stacked together in an electrolytic fluid containing sulphuric acid, to give a voltage output of 12V.

With the advent of new technologies in the market like start-stop and regenerative braking processes, SLI batteries have been improved, boosting the SLI battery market value. The low cost and easy availability of lead is a positive factor for SLI batteries to have a high popularity, even though lead is a major pollutant. Improved recycling capabilities have also helped this industry to grow rapidly. Other driving factors for the high demand for SLI batteries include an increased number of distribution channels and a general rise in the incomes and need for personal mobility. Since more durable cars are brought into the market, the need to replace batteries would also be high over the years.

### Key Trends and Developments

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Shift towards enhanced flooded batteries (EFBs), increased focus on sustainability, and widespread adoption of start-stop systems in vehicles are the key trends propelling the market growth.

November 2024

Separator company Microporous invested USD 1.35 billion to establish a new lithium-ion battery separator manufacturing facility in South Virginia, United States. The company has announced its intention to leverage its expertise in lead battery separators while shifting its focus towards the production of lithium-ion battery separators for various applications, including SLI batteries, automotive start-stop systems, motive power, and stationary power solutions.

July 2024

Exide Industries Ltd. launched an advanced Absorbent Glass Mat (AGM) battery specifically designed for Starting, Lighting, and Ignition (SLI) applications in the automotive market. This new battery technology aims to meet the growing demand for high-performance batteries in modern vehicles, particularly those equipped with energy-saving features like regenerative braking.

July 2024

International Battery Metals (IBAT.CD) announced the introduction of its innovative lithium filtration technology. This development has the potential to facilitate more cost-effective and expedited access to the essential metal used in electric vehicle batteries.

April 2024

Standard Lithium announced the successful commissioning and validation of North America's largest continuously operating Direct Lithium Extraction (DLE) unit at its Demonstration Plant in El Dorado, Arkansas. This significant milestone was achieved with the installation of a commercial-scale DLE column, specifically a Li-Pro Lithium Selective Sorption (LSS) unit supplied by Koch Technology Solutions.

Shift Towards EFBs

There is a notable shift towards Enhanced Flooded Batteries (EFBs) and Valve-Regulated Lead-Acid (VRLA) batteries within the SLI segment due to their improved performance characteristics compared to traditional flooded batteries. Innovations in battery technology are enhancing efficiency, longevity, and reliability, which are critical for modern automotive applications, and further increasing SLI battery market revenue. For instance, Exide Industries offers a range of Enhanced Flooded Batteries (EFB) under its SF Sonic brand. These batteries are designed to deliver superior reliability and performance for modern automotive applications, particularly for vehicles with start-stop technology and higher energy demands. Additionally, GS Yuasa has been expanding its VRLA battery portfolio by introducing innovative products that cater to the evolving demands of the automotive market. Their expertise in battery technology allows them to enhance performance, durability, and environmental sustainability in their VRLA offerings.

Increased Focus on Sustainability

Manufacturers are increasingly focusing on sustainability by improving recycling capabilities and exploring eco-friendly materials for battery production. This trend of SLI battery market aligns with global efforts to reduce environmental impact and comply with stringent regulations regarding battery disposal and emissions. The EU has a comprehensive strategy in place known as European Union Sustainable Battery Regulation that includes requirements for carbon footprint labelling, recycled content, and performance standards for batteries. This regulation encourages manufacturers to adopt more sustainable practices throughout the battery

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lifecycle, from production to disposal. Moreover, Redwood Materials is a US-based startup which focuses on creating a circular supply chain for lithium-ion batteries by retrieving and recycling raw materials like cobalt, copper, and nickel from end-of-life batteries.

#### Rise in Start-Stop System Implementation

The widespread adoption of start-stop systems in vehicles is significantly boosting the demand of SLI battery market. These systems automatically turn off the engine when the vehicle is stationary and restart it when needed, which places additional strain on the battery. Consequently, there is a rising need for high-quality SLI batteries that can withstand these demands, driving innovation in battery design and manufacturing. VARTA has developed specialised AGM (Absorbent Glass Mat) batteries designed specifically for vehicles equipped with start-stop technology. These batteries provide excellent cold-start performance and can handle the frequent engine restarts required by start-stop system. Meanwhile, Tianneng has launched its TAA Series AGM Start-Stop Batteries, which are designed to provide maintenance-free operation with maximum vibration resistance.

#### Expansion of Aftermarket Services

The growing vehicle fleet and ageing battery infrastructure are driving demand for replacement SLI batteries in the aftermarket. This trend highlights the importance of reliable service providers for battery maintenance and replacement. As global vehicle ownership continues to rise, particularly in developing economies, the demand for replacement SLI batteries in the aftermarket is growing significantly. For instance, according to the International Organization of Motor Vehicle Manufacturers (OICA), China produced around 30.161 million motor vehicles in 2023, while India produced over 5.85 million. This surge in vehicle production contributes to a larger pool of vehicles requiring regular maintenance and battery replacements. As vehicles age, their batteries typically need replacement every 3 to 5 years, creating a steady demand for aftermarket SLI batteries.

#### SLI Battery Market Trends

The expansion of renewable energy sources such as solar and wind power is creating new opportunities for SLI batteries. These batteries can provide backup power solutions for renewable energy systems, storing excess energy generated during peak production times and releasing it when demand exceeds supply, which further contributes to growth of the SLI battery market. As governments promote clean energy initiatives, the demand for SLI batteries in this sector is expected to grow. For instance, Power Sonic offers a range of deep cycle batteries specifically designed for renewable energy applications, including solar and wind power systems. Their batteries are engineered to provide reliable energy storage solutions that can handle the intermittent nature of renewable energy generation.

A rise in the demand is mainly expected in the Asia Pacific sector because of shifting industries to these regions and a general rise in the demand for personal vehicles, despite a slight slump due to the Covid pandemic. This may also be observed due to the lower cost of steel production and processing as well as the easy availability of skilled labour. The same factors may apply to other regions with a robust industrial complex, like Europe and North America.

#### SLI Battery Market Restraints

The increasing adoption of electric vehicles, which predominantly use lithium-ion batteries, poses a significant threat to the traditional lead-acid segment in SLI battery. As consumers and manufacturers shift focus towards EVs for their efficiency and lower environmental impact, the demand for conventional SLI batteries is expected to decline, impacting SLI battery demand forecast. This transition is driven by the growing emphasis on sustainability and government incentives for electric vehicle adoption.

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Advanced battery technologies such as lithium-ion and nickel-metal hydride batteries offer superior efficiency, longer life spans, and lower maintenance requirements compared to traditional SLI batteries. This competition is intensifying as manufacturers seek to improve vehicle performance and reduce emissions, making it challenging for SLI batteries to maintain their market share in certain applications.

#### SLI Battery Industry Segmentation

□ SLI Battery Market Report and Forecast 2025-2034 □ offers a detailed analysis of the market based on the following segments:

##### Market Breakup by Type

- Flooded
- Enhanced Flooded Battery (EFB)
- Valve-Regulated Lead-Acid (VRLA)

##### Market Breakup by Sales Channel

- OEM
- Aftermarket

##### Market Breakup by End Use

- Automotive
- UPS
- Telecom
- Others

##### Market Breakup by Region

- North America
- Europe
- Asia Pacific
- Latin America
- Middle East and Africa

#### SLI Battery Market Share

##### Market Analysis by Type

The flooded battery holds the highest SLI battery market share. This dominance is attributed to the affordability and widespread availability of flooded batteries, making them a preferred choice for many consumers, especially in developing regions. Flooded batteries are known for their reliability and are commonly used in traditional vehicles due to their ability to provide sufficient power for starting engines and operating electrical systems.

On the other hand, valve-regulated lead-acid (VRLA) batteries are known for their maintenance-free operation and reduced risk of electrolyte leakage. These batteries are widely used in cars like Mercedes-Benz because they provide consistent power and longer service life. The sealed design of VRLA batteries also prevents electrolysis leakage, contributing to a longer lifespan, which makes

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them an attractive option for manufacturers.

### Market Analysis by Sales Channel

The original equipment manufacturers (OEM) segment holds a major market share. The OEM segment is estimated to dominate due to its integral role in car manufacturing, as every new vehicle requires an SLI battery for operation. As per the SLI battery industry analysis, this results in a steady and predictable demand for OEM-supplied batteries, particularly as automobile manufacturers often partner with dealerships to ensure their batteries are the default option for new vehicle sales.

Aftermarket sales encompass batteries sold through retail outlets, auto parts stores, and service centers for vehicle maintenance. As vehicles age, the need for battery replacements increases, particularly in regions with a high population of older vehicles. For example, in the United States, major retailers like AutoZone and O'Reilly Auto Parts play significant roles in the aftermarket by providing a wide range of SLI batteries for various vehicle models. As per SLI battery market report, the growth of this segment is driven by rising vehicle ownership rates and the necessity for regular maintenance.

### Market Analysis by End Use

The automotive segment accounts for a major market share. This dominance is due to the massive annual production volume of vehicles worldwide, which necessitates a consistent supply of SLI batteries tailored for various automotive applications. In contrast, while the UPS and Telecom segments also utilise SLI batteries, their demand is significantly lower than that of the automotive sector. The UPS segment primarily relies on batteries for backup power solutions.

### SLI Battery Market Regional Insights

#### Asia Pacific SLI Battery Market Outlook

Asia Pacific accounted for a significant portion of the global market, owing to the overall high population of consumers, especially in China, India, and Indonesia. This is further boosted by the fact that many users in these regions use their vehicles far over their warranty period which requires changing the battery multiple times meaning that the overall national fleet age in developing countries like Brazil, China, and India is high that can increase the SLI battery market opportunities.

According to the International Organization of Motor Vehicle Manufacturers (OICA), China produced around 30.161 million motor vehicles in 2023, while India produced over 5.85 million. The growing middle class and rising per capita income are further driving demand for both new and replacement SLI batteries.

#### North America SLI Battery Market Overview

The North American market is projected to grow significantly due to an increase in the production of heavy-duty trucks and vehicles. □The adoption of start-stop technology in these vehicles is also contributing to the demand for advanced SLI batteries, such as Absorbent Glass Mat (AGM) and Enhanced Flooded Batteries (EFB), which offer better performance and durability compared to traditional flooded batteries, increasing the overall SLI battery industry revenue.

Companies are increasingly focusing on innovation to enhance battery performance. For instance, Clarios, a leading player in the SLI battery market, is investing in new technologies to improve battery efficiency and lifespan, ensuring they meet the growing demands of the automotive industry.

#### Europe SLI Battery Market Trends

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Europe is witnessing growth in the market due to stringent regulations aimed at reducing vehicle emissions and promoting energy efficiency. The adoption of start-stop technology in vehicles is also contributing to this trend. The growth of the SLI battery industry is further supported by a strong automotive manufacturing base, with countries like Germany and France leading in vehicle production. In October 2024, Germany produced approximately 377,700 vehicles, reflecting a 17% increase compared to the previous year, aiding the growth of the SLI batteries.

The shift towards electric vehicles (EVs) is influencing traditional SLI battery usage, but the ongoing demand for conventional vehicles continues to drive market growth.

#### Latin America SLI Battery Market Opportunities

In Latin America, the automotive sector's growth is significantly boosting the demand for SLI batteries. Increased production of vehicles and their applications in industrial sectors like telecommunications are key drivers. For instance, Brazil is one of the largest automotive markets in Latin America, with vehicle production expected to grow significantly. In 2023, Brazil produced approximately 2.4 million vehicles, reflecting an 8% growth compared to previous years, which impacted the SLI battery demand growth.

The region's automotive production has been on the rise, leading to greater utilisation of SLI batteries for uninterrupted power supply needs across various applications.

#### Middle East and Africa SLI Battery Market Dynamics

The automotive sector in the MEA region is expanding rapidly, with countries like South Africa leading the way. The South African automotive industry is projected to grow significantly, supported by government initiatives aimed at increasing local vehicle production. The South African Automotive Masterplan (SAAM) 2021-2035 aims to increase the country's global vehicle production by 1% annually by 2035, targeting a production volume of 1.4 million vehicles per year which boosts SLI battery demand. This plan emphasises localisation, with a goal to achieve a 60% localisation rate by 2035, significantly enhancing South Africa's position in the global automotive market, boosting the growth of SLI batteries.

#### Innovative Startups in SLI Battery Market

Startups are focusing on creating advanced battery technologies that enhance performance and efficiency. For instance, companies are developing Enhanced Flooded Batteries (EFB) and Absorbent Glass Mat (AGM) batteries, which offer improved cycling capabilities and durability compared to traditional lead-acid batteries. Many startups in SLI battery market are further emphasising sustainability by exploring eco-friendly alternatives to traditional lead-acid batteries.

#### C2C-NewCap

Based in Portugal, C2C-NewCap is pioneering eco-friendly battery technology with its GO-START supercapacitor module. This innovative product is designed to replace traditional SLI batteries, offering a deep-cycle battery solution with a significantly longer lifespan. The company is backed by the EU-funded HYCAP project and has established pilot production lines to prepare for market entry.

#### Batteries for Future

This startup focuses on developing advanced lead-acid batteries that cater specifically to the needs of modern automotive

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applications. They emphasize improvements in battery efficiency, lifespan, and environmental impact. By leveraging new technologies and materials, company aims to deliver high-performance SLI batteries that can support the increasing demands of hybrid and electric vehicles while also addressing sustainability concerns.

## Competitive Landscape

The report gives a detailed analysis of the following key players in the global SLI battery industry, covering their competitive landscape, capacity, and latest developments like mergers, acquisitions, and investments, expansions of capacity, and plant turnarounds. Manufacturers are focusing on improving battery performance through innovations such as Enhanced Flooded Batteries (EFB) and Absorbent Glass Mat (AGM) technologies, which offer benefits like better cycling capabilities and enhanced performance in extreme temperatures. Additionally, there is a notable shift towards eco-friendly solutions, with companies exploring sustainable materials and production methods to meet increasing regulatory pressures and consumer preferences for environmentally responsible products.

### Johnson Controls, Inc.

Johnson Controls International plc is a multinational conglomerate headquartered in Cork, Ireland, specialising in building products and systems. It operates across various sectors, including HVAC (heating, ventilation, and air conditioning), fire suppression, and security systems.

### East Penn Manufacturing Co., Inc.

East Penn Manufacturing Co., Inc. is a leading manufacturer of lead-acid batteries and related products based in Pennsylvania, the United States. The company produces a wide range of batteries for automotive, telecommunications, marine, commercial, and industrial applications under the Deka brand name.

### Leoch International Technology Limited Inc.

Leoch International Technology Limited is a global manufacturer of lead-acid batteries headquartered in Hong Kong. Established in 1999, The company specialises in producing a variety of battery types, including sealed lead-acid (SLA) batteries for various applications such as telecommunications, electric vehicles, and renewable energy storage.

Other players in the SLI battery market are GS Yuasa Corporation, Crown Battery Manufacturing Company, and Exide Technologies, among others.

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