



**Global leader**

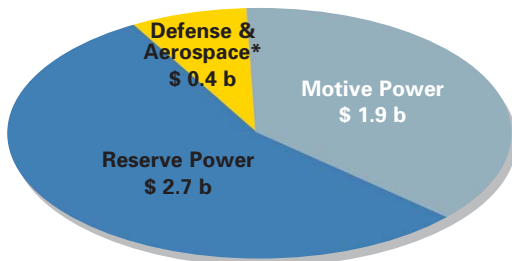
**Technical  
leadership**

**Easy to do  
business with**

# Market Overview – \$ 5 Billion

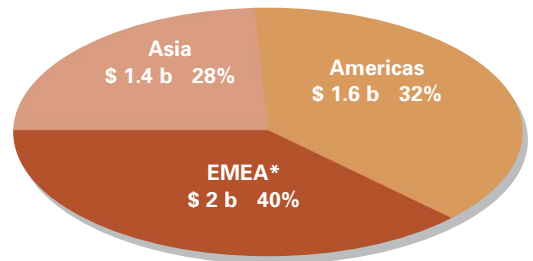
for motive power and reserve power applications

## Segments



\*Included power for fighting vehicle, aircraft, submarine and other applications

## Regions



\*Europe-Middle East-Africa

## Applications

### Motive Power

Industrial Forklift Trucks	85%
Specialty Equipment	10%
Rail & Other	5%

### Reserve Power

Telecom	40%
UPS	30%
Switchgear, Solar & Other	30%

### Defense and Specialty

Included power for vehicle, aircraft, submarine and other

**Global Market Leader - Over 25% Share Worldwide**  
**Leading with the world's leading customers**

## Motive Power

### Original Equipment



### Users



## Reserve Power

### Original Equipment



### Users



# Power/Full Solutions

## for a global marketplace

Our vision at EnerSys is to be the global leader in our chosen markets for stored energy solutions by providing extraordinary Customer service and meeting or exceeding our Customers' expectations 100% of the time. We shall

be the best in the industry by being easy to do business with, while supplying the highest quality products and services on time and in the most cost-effective manner. We will do this in a culture that demonstrates respect for our

Customers, our fellow associates, our suppliers and our communities while focusing upon maximizing shareholder value.

## Global Capability

**EnerSys operates in over 100 countries worldwide with a truly global manufacturing organization**



### Global & Americas Headquarters

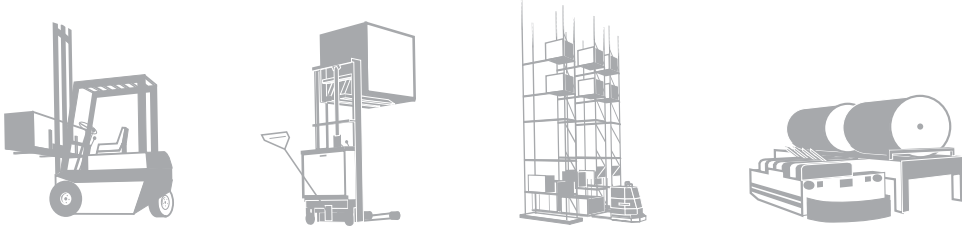
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### Regional Headquarters

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**EnerSys Asia**  
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Shekou Industrial Zone  
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# Motive Power



## Markets:

Material handling equipment, including a full range from small walk-behind trucks in food stores, to massive, narrow aisle equipment in today's most advanced logistics hubs, represents a large and growing industry.

The growth of these markets is being driven by broad economic growth and global trade, advanced supply chains, and further shifts from internal combustion trucks to electric (battery powered) forklift trucks.

EnerSys is the world's largest producer of batteries and chargers for material handling equipment, with leading market share positions in North America and Europe, and fast-growing positions in China and across Asia.

## Products:

Today, EnerSys provides solutions ranging from high energy solutions, to reduced watering/maintenance batteries, to valve-regulated (VRLA) or "sealed" solutions. Product designs cover North American specifications, European "DIN", British Standard designs, and sizes to cover the Asian material handling equipment.

EnerSys advanced charger technology provides benefit to the customer regarding

- reduced operation costs in terms of energy consumption and maintenance
- operational reliability
- optimized charging of the battery to extend lifetime and improve availability of the whole system

- tailor-made solutions according to application and operation requirements

EnerSys' charger products include classic robust chargers, energy-saving high frequency chargers, and a line of "fast chargers" to cover the range of end-user requirements for economy and high performance in application.

In addition to our core battery and charger products, EnerSys leads the industry in providing "turn-key" solutions for battery handling and charging room designs to reduce the total costs of operation.



# Reserve Power



## Markets:

Dependence on continuous power or dial tone has never been more important with integrated networks and systems, yet worldwide power generation and distribution investments continue to lag behind the growing demand.

EnerSys is the global leader in supplying reserve power (or standby power) batteries, which cover the range of applications:

- Wireline and Wireless Telecommunications,
- Uninterruptible Power Supplies (UPS) for computer systems, security, etc.
- Protection power for utility switchgear

## Products:

With leading brands from North America, Germany, England, France, China, and many other countries, EnerSys has the reputation, technology and product range to cover all applications effectively.

The industry's largest demand is for a range of lead acid-based offerings due to the reliability, cost and recyclable features. EnerSys' range of lead acid-based products is complete up to 12,000 AH:

- Flooded or classic (flat plate, tubular & plante)
- VRLA – gel and AGM large 2V cells
- High power discharge UPS block products

- Industry leading front termination AGM blocks
- Advanced technology "TPPL or SBS" pure lead designs

EnerSys has led the industry in providing advanced stored power solutions featuring long life, energy density, cyclic performance, and high temperature resistant designs.

EnerSys provides battery designs made in North America, Europe and China to afford our global leading customers compatible, highly-reliable components that integrate seamlessly into their global supply chains.



# Defense and Specialty

## Defense/Aerospace:

Our extensive product range serves a variety of aerospace (defense aviation, general/commercial aviation) and defense applications (tactical vehicles, submarine ...). EnerSys technology batteries are currently in service with many of the armed forces around the world. Thanks to its recent acquisitions of companies producing NiCd, and lithium-ion battery cells, EnerSys has reinforced its position as a leader for the supply of all applications in defense and aerospace.



## Railways:

Whatever the need, whether for rolling stock or for standby applications, EnerSys can provide standard batteries or tailored solutions in accordance with local standards and designs.



## Mining:

For 100 years the Oldham name has been synonymous with high quality and innovative mine lighting. The Oldham range of safety lamps has been tailored to meet the requirements of silver mines in the High Andes to coal mines in Central Queensland. This robust, totally reliable, safety product is also used industrially by fire brigades, railways, utility companies, oil and chemical industries and the armed services. New, advanced products are being launched in 2006.



## Odyssey:

This range offers an extraordinary set of added values : long service life, superior cranking and fast charge capability, flexibility, worry free shipping, long storage life, deep discharge recovery , military grade... permitting a wide field of applications for industrial and domestic use : automotive, commercial, RV, marine, motorcycle, watercraft, etc.



## Renewable energy:

The PowerSafe and Cyclon ranges of batteries provide the most reliable performances and long service life for solar (village electrification, remote telecom, water pumping, marine) applications.

