

TIME. TRAVEL.

Pb 2025

***Automotive Lead batteries
and low voltage power train trends***

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THE WORLD LEADER IN ENERGY STORAGE FOR LOW-VOLTAGE



#1

Global Market Position

~4X

Larger than the Closest Competitor
Based on Production Volume

1 IN 3

Vehicles Powered by a Clarios
Battery Worldwide

~155M

Batteries Sold Annually

100+

Countries Supplied by Our Volume
Globally

~80%

Of Sales Focused on Highly Resilient
and Reoccurring Sales in the
Aftermarket Channel

100%

Of Our Products Sold
are Recyclable

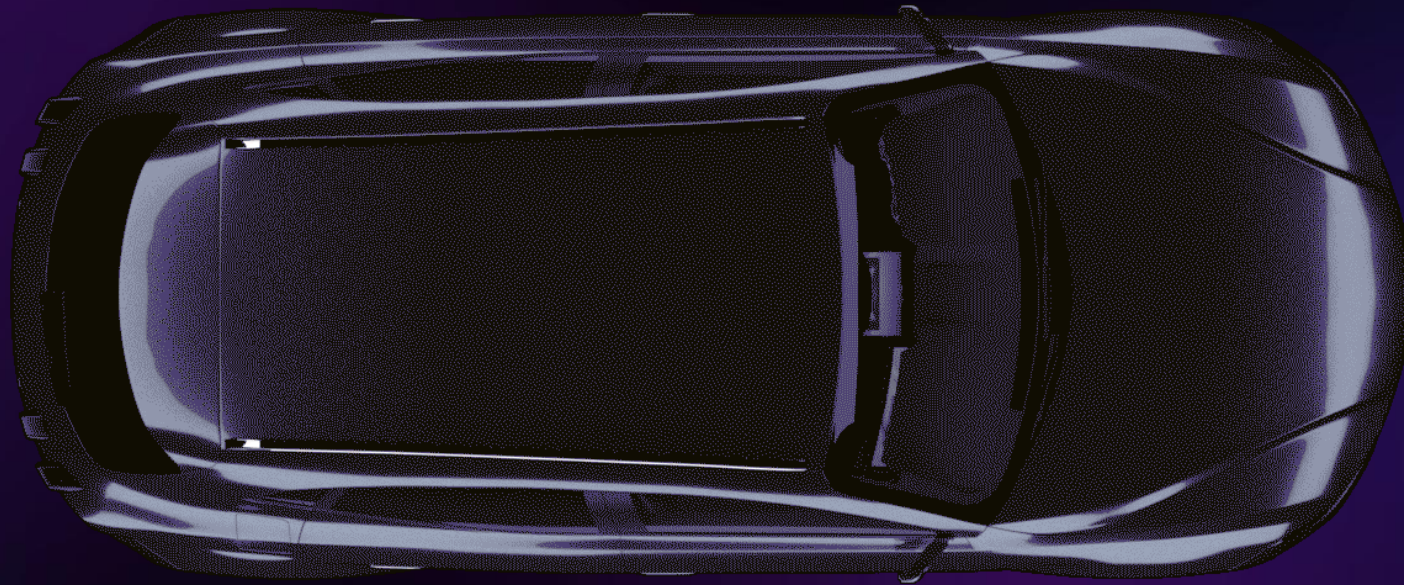
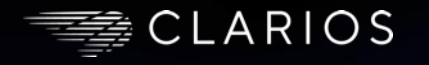
130+

Year Tradition of Innovation
and Growth

CLARIOS BRANDS



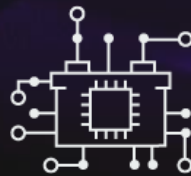
EVERY VEHICLE TYPE NEEDS A LOW-VOLTAGE BATTERY



***AS WE LOOK TO THE FUTURE, OUR INDUSTRY
IS BEING TRANSFORMED BY THREE KEY TRENDS:***



ELECTRIFICATION



DIGITALIZATION

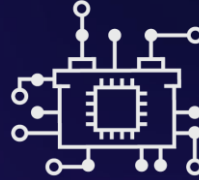


CIRCULARITY

TODAY'S TAKEAWAYS



The **industry** is **transforming**, creating strong growth **tailwinds** for **Clarios**



Our **total systems expertise** is driving **value** for **customers**



We are **investing significantly** in innovation to drive the **future of mobility**



We are benefitting from a multi-decade mix-shift to higher-margin advanced batteries



Our chemistry agnostic portfolio and total systems approach enables us to optimize for our customers



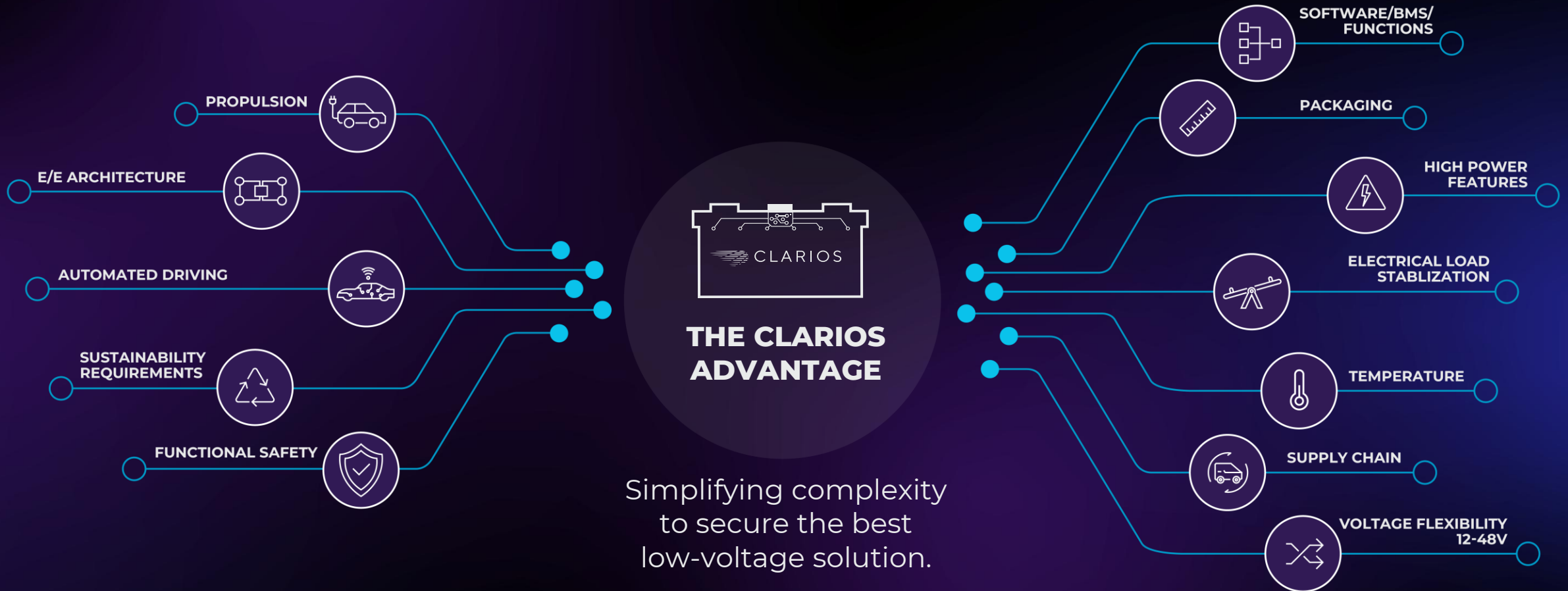
We are leveraging AI & automation to drive operational excellence in our factories and business

Clarios is well-positioned for long-term, sustainable growth and continued low-voltage leadership globally.

The Future

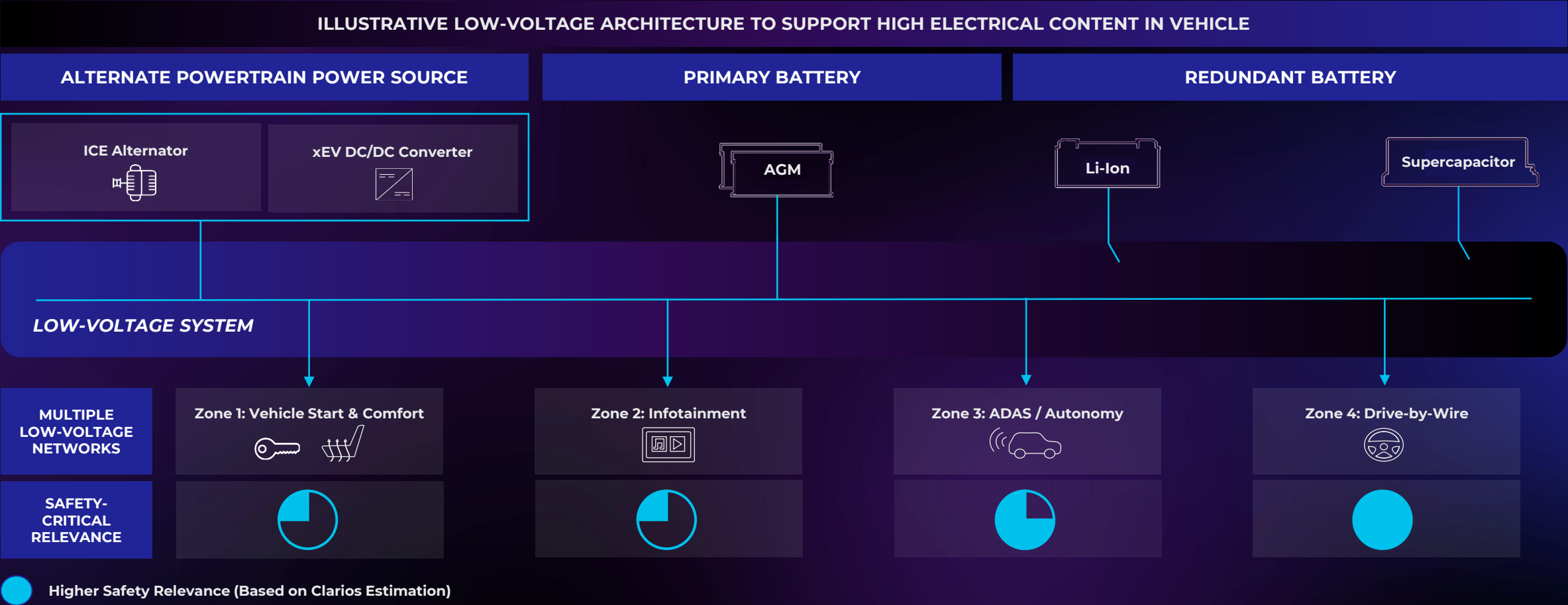


CLARIOS COLLABORATES WITH OEM CUSTOMERS TO PROVIDE INTEGRATED LOW-VOLTAGE SOLUTIONS.



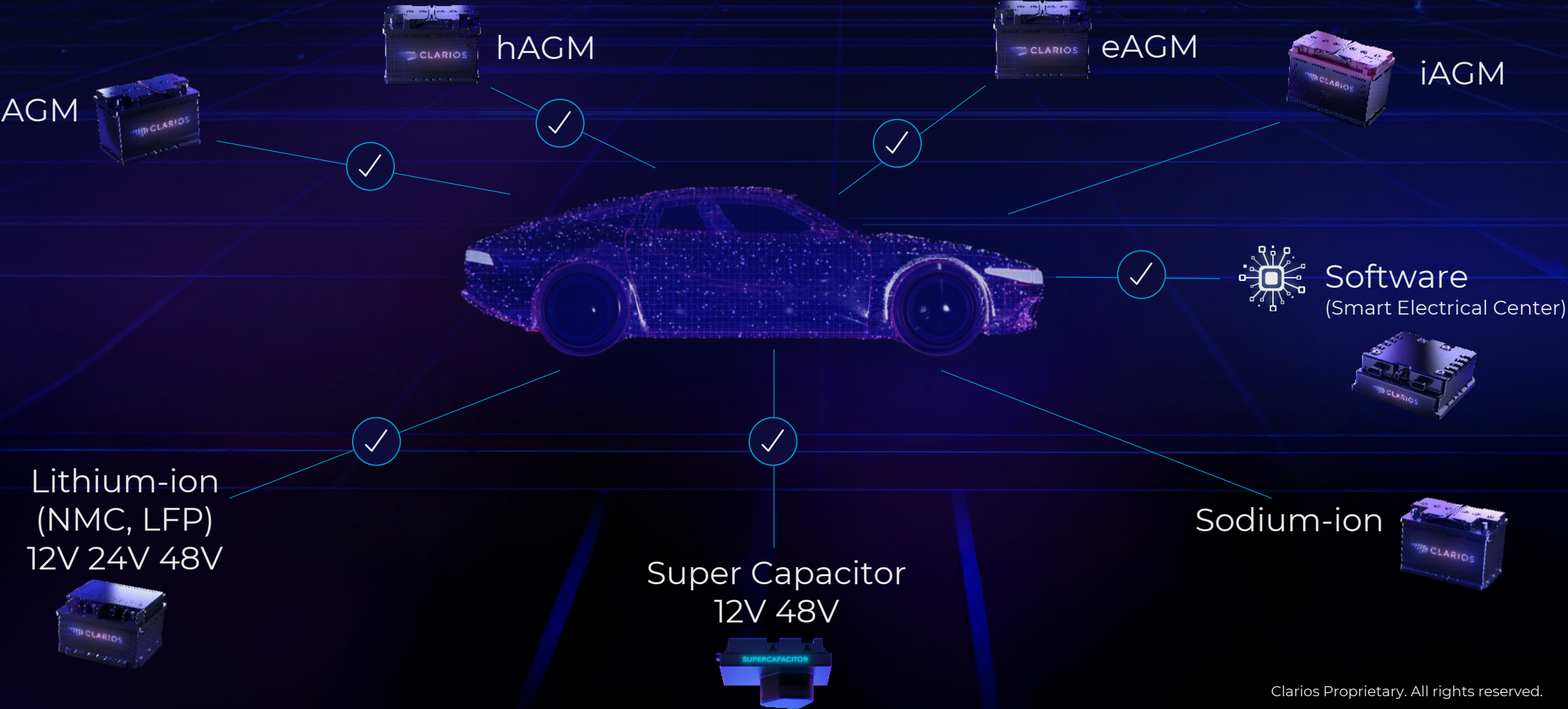
Solutions provided can be leveraged and scaled across end markets

CLARIOS' LOW-VOLTAGE SOLUTIONS ENABLE PASSENGER VEHICLE POWER DEMANDS, DRIVEN BY KEY MOBILITY TRENDS



Clarios' footprint extends beyond the battery, with the ability to provide holistic and comprehensive Low-Voltage System Solutions

CUSTOMERS ARE DRIVING DEMAND ACROSS OUR PORTFOLIO



PROGRESSING ON ADVANCED DEVELOPMENT



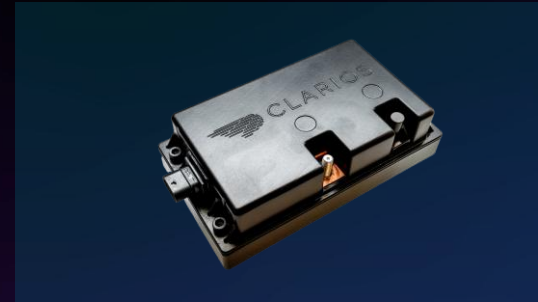
SODIUM-ION



BENEFITS

- Reduced Supply Chain Risk
- Availability of materials
- Attractive energy density
- Cost saving potential about 15-20% vs Li-ion

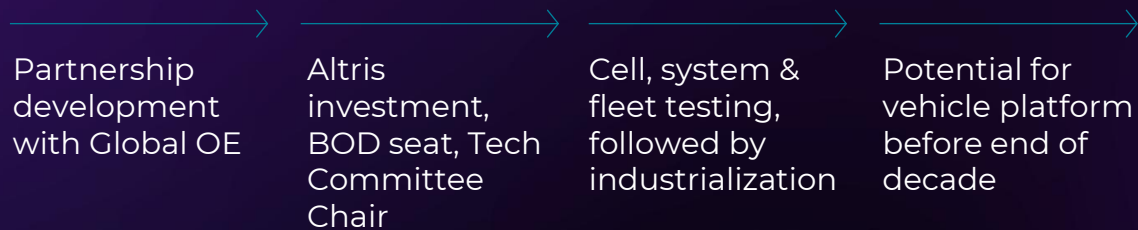
SUPERCAPACITORS



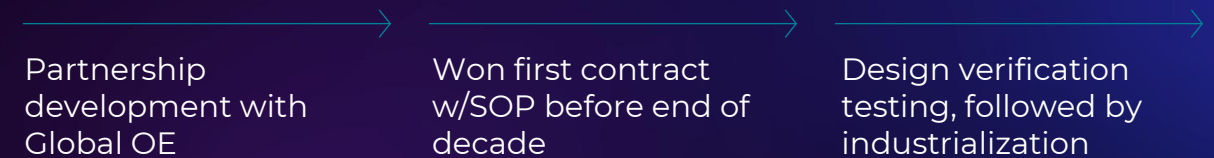
USES

- Short bursts of high power
- Power stabilization / Peak Power
- CO2 / Fuel Efficiency
- Safety & Redundancy

DEVELOPMENT & COMMERCIALIZATION ROADMAP



DEVELOPMENT & COMMERCIALIZATION ROADMAP



Clarios continues progress on Sodium-ion & Supercapacitors.



Power
Stabilization/
Peak Power



CO₂ / Fuel Efficiency



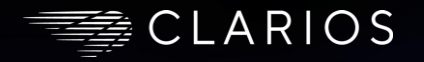
Safety &
Redundancy

***ACTIVE CHASSIS SYSTEMS
REQUIRE SHORT BURSTS
OF POWER.***

***SUPER CAPACITORS ARE ONE
SOLUTION FOR THE FUTURE.***

Adding supercapacitors to the Clarios Low-Voltage Portfolio to deliver an Integrated and cost-optimized solution

Clarios Partners with European Truck Manufacturer: Launching development of 24-volt lithium-ion batteries



- Lighter, safer, and more robust
- Supports overnight stays without idling and integrates safety and autonomous features
- Enhancing fleet efficiency.
- Smart diagnostics and predictive maintenance
- Marketed by VARTA Automotive in Europe

24-VOLT LITHIUM-ION BATTERY



New development project with Heavy Duty OE

THANK YOU

STAY CONNECTED AT [CLARIOS.COM](https://clarios.com)