



Power/Full Solutions

Energy Storage and Battery Diversification

May 10 , 2023

EnerSys at a Glance

LEADING PROVIDER OF DIFFERENTIATED ENERGY SOLUTIONS

\$3.4bn¹

Sales

7.9%¹

Adj. Operating Margin

\$4.47¹

Adj. Diluted EPS

~11.4k¹

Total Employees

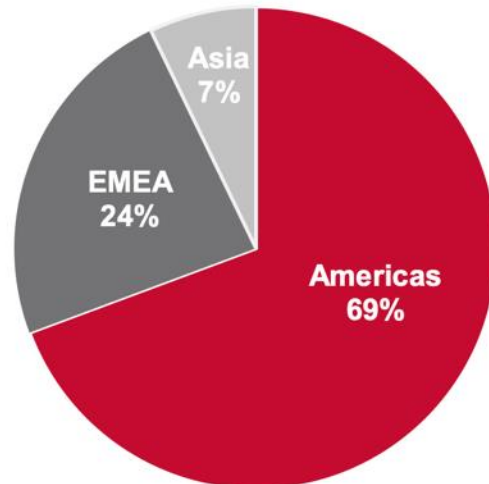
10k+¹

Customers

22%¹

Market Share²

FY'22 SALES BY GEOGRAPHY



GLOBAL CUSTOMER BASE³



June 2022
© 2022 EnerSys. All Rights Reserved.

1. FY'22, year end March 31, 2022
2. Source: BCI, Eurobat industry reports and management estimates based on the markets where EnerSys participates. Market size and share are for batteries and chargers only. It excludes power solution and services to broadband, telecom and other markets, and the aerospace & defence and cabinet enclosures markets (each estimated at \$1 to \$2 billion)
3. Represents geographies with EnerSys manufacturing and distribution centers

EnerSys Lines of Business

A GLOBAL LEADER IN ENERGY STORAGE



Energy Systems

\$1.5B FY'22 Revenue

Energy Systems focuses on the telecommunication and broadband, utility industries, renewables, and data center applications requiring stored energy solutions



Motive Power

\$1.4B FY'22 Revenue

Motive Power batteries are utilized in electric forklift trucks, mining, and other commercial electric powered vehicles



Specialty

\$0.5B FY'22 Revenue

Specialty segment provides energy storage solutions to the aerospace, defense, and transportation industries

Technology Driven Portfolio Transformation

2010

- Traditional lead acid battery company
- Narrow set of end markets
- Limited scale

2022

- Integrated technology solutions across energy storage, power & electronics, and software & services
- Broad exposure to a wide range of end markets with secular growth trends
- Enhanced scale

Growth Opportunities

- Expand capacity for premium products
 - Grow **Motive Power maintenance-free** solutions
 - Increase **Transportation market share**
- Leverage **5G and other megatrends** with proprietary technologies
 - Small Cell build out
 - Battery management and software platforms
 - Fast Charge & Storage launch
- Reduce costs through **EOS** and volume leverage

Transformed Through Strategic Initiatives and Disciplined M&A

Strategic Initiatives

- ✓ Expansion of TPPL product line
- ✓ Launched lithium platform
- ✓ End market / product diversification

M&A



2010



2013



2015



2018



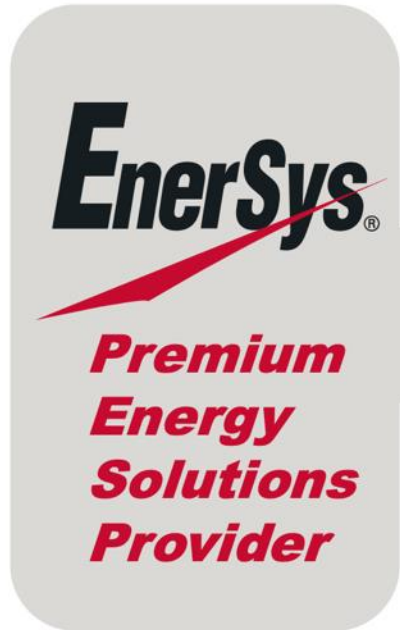
2019

Leveraging Our Platforms Across All Segments

3 Core Technology Platforms

3 Business Segments

8 End Markets



Technology Advancements

POWERING THE FUTURE, EVERYWHERE FOR EVERYONE

CPUC Network Powering Program



Advancing both TPPL and Lithium modules

Specialty Batteries



Making history with specialty solutions

Wireless Chargers



Maintenance-free batteries & wireless solutions*

Fast Charge & Storage



Upgraded on-site demo installed

TouchSafe



Strategic collaboration to facilitate 5G small cell radios

Government / Industry Partnership

POWERING THE FUTURE, EVERYWHERE FOR EVERYONE

- **US Electrification impacts are well beyond Electric Vehicles**
 - **Industry in place to support many of these emerging requirements**
- **Support / funding for existing US Battery Manufacturers to advance current and future technologies**
- **Essential that US Intellectual Property is both protected and valued by the Federal Government to avoid falling behind non-allied countries**
 - **Policies to promote IP growth while protecting existing manufacturing capability and technical work force**
- **Department of Defense needs are unique and continued partnership / investment is required to support the fast-changing battery requirements of Defense applications**

EnerSys[®]

Power/Full Solutions

Thank You