

European Portable Power Tool Market



- 20 “EPTA” manufacturers
- Approximately 15,000 employees
- Unknown number of importers
- 2009 market €2.9 billion
- 2010 market €3.2 billion

2010 Market Share (2008)

- Corded tools 62% (64%)
- Cordless tools 38% (36%)



TTS Tooltechnic Systems



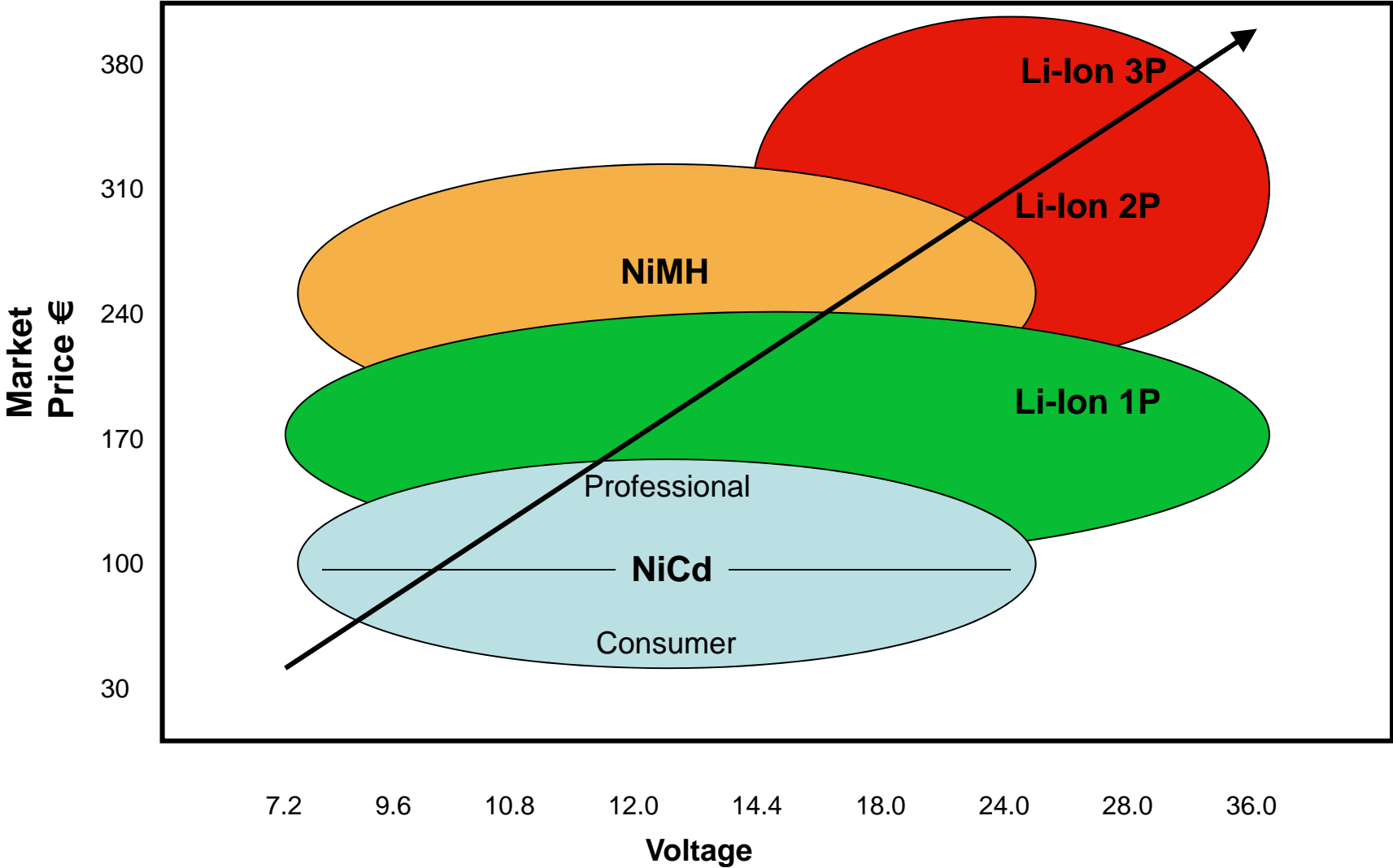
2010 Battery Share (2008)

- NiCd 34% (49%)
- NiMH 6% (11%)
- Li-Ion 60% (40%)



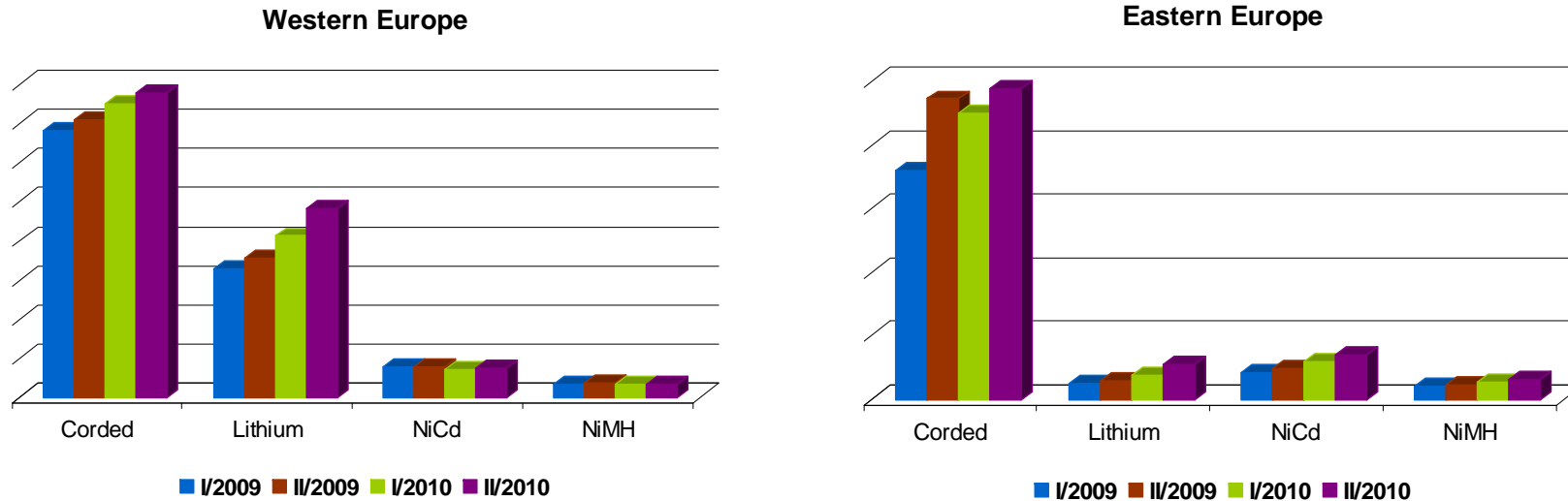
Source EPTA

European Cordless Power Tool Market Market Price / Voltage



No other technology is currently commercially available

European Portable Power Tool Market Professional Products Regional Difference



81% of Western Europe cordless sales are Li-Ion – Ni based sales are flat

33% of Eastern Europe cordless sales are Li-Ion - Ni based sales are growing

European Cordless Power Tool Market Market Price Effect



18 volt NiCd
Going price
€182



18 volt NiMH
Going price
€204



18 volt Li-Ion
Going price
€280

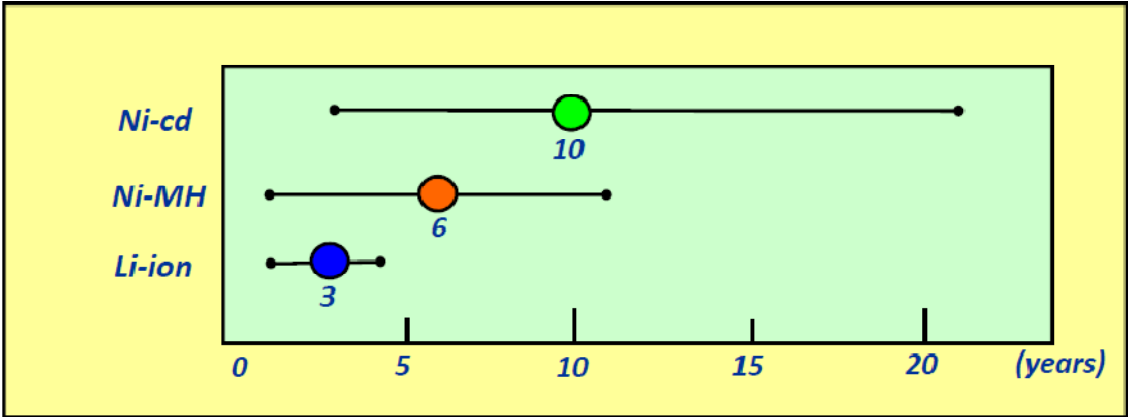


18 volt NiCd
Going price
€68



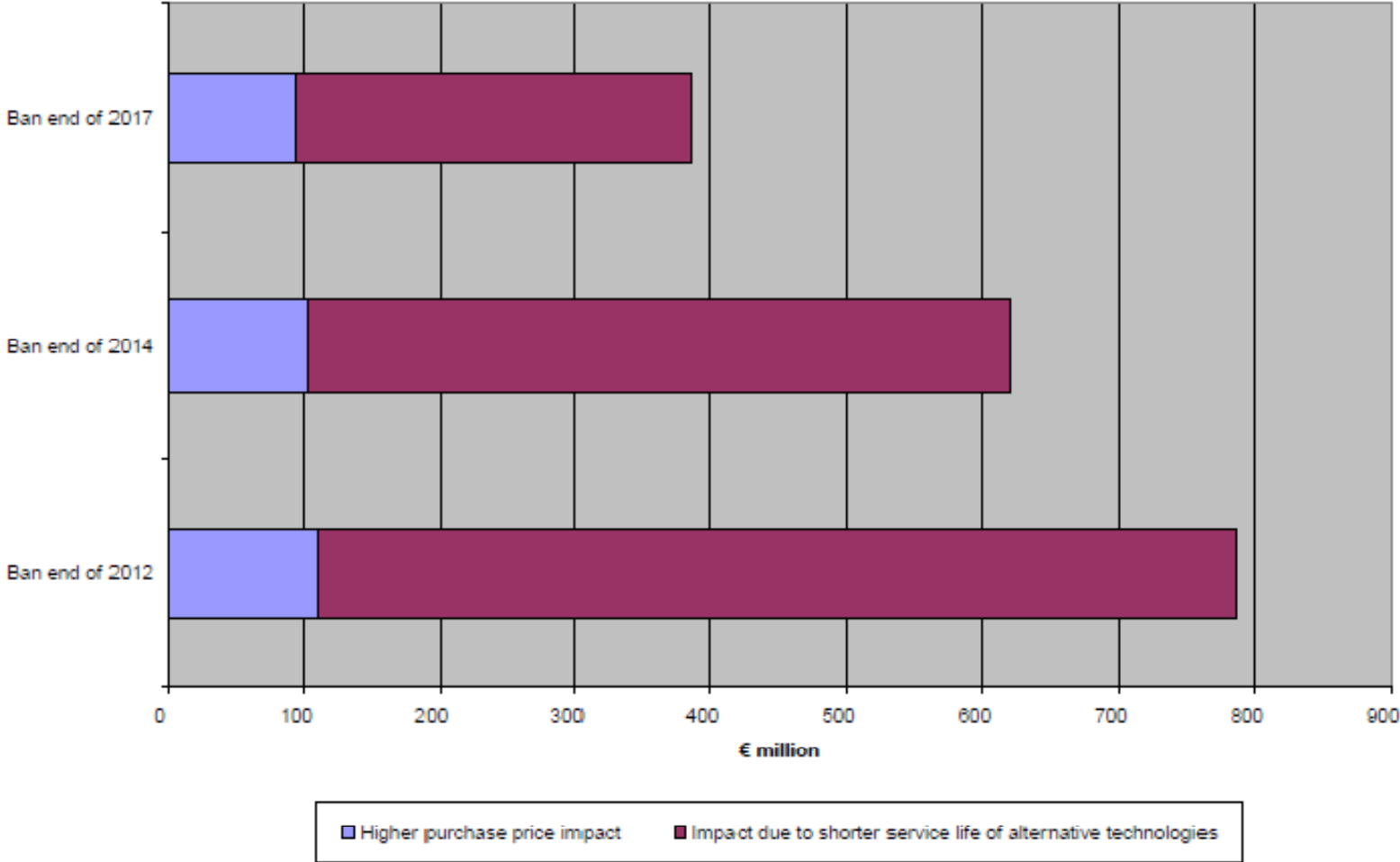
18 volt Li-Ion
Going price
€141

European Cordless Power Tool Market Battery Service Life



NiCd batteries surpass other technologies in service life. This means that consumers may need to replace NiMH or Li-Ion powered tools earlier compared to NiCd powered tools. High powered Li-Ion, although fully tested, remains a recent innovation and a commercial life-cycle is needed to fully prove the technology.

European Cordless Power Tool Market Economic Impact of Withdrawing Exemption on the Consumer



European Cordless Power Tool Market Environmental Impact of Withdrawing Exemption on the Consumer



- Prohibiting NiCd batteries in cordless power tools would have a minimal impact in reducing the Cd uptake for the general population compared to other sources such as fertilisers, smoking or dietary intake. (Reference 2008/C149/03 Risk Assessment Report)
- There has already been a significant reduction in the number of NiCd batteries since the 2006 Battery Directive as a result of:
 - The rapid development of Li-Ion
 - The increase in collection and recycling programmes

Current data shows encouraging signs that Ni-Cd batteries are being collected and recycled at better than target numbers in some member states

European Cordless Power Tool Market Conclusions



- Technology evolution away from NiCd has been initiated by Power Tool Industry in a direction not foreseen by the Battery Directive
- Business forecast trends towards further reduction of NiCd market share but industry expects NiCd to level out at 20 to 25% for foreseeable future
- Major economic impact is on the consumer (especially in Eastern Europe) – higher purchase price and shorter useful life
- The best environmental solution remains increased focus on collection and recycling in all member states