

Collaboration for European Competitiveness

20 November 2025, Warsaw

AUTOMOTIVE MARKET DEVELOPMENT

Volume reduction and simultaneous transformation



The Economist

Porsche's warning lights are flashing

Porsche is synonymous with high performance. And for many years the financial performance of the German maker of sports cars was as...



BMW Blog

BMW Issues Profit Warning, Citing Weak China Market and Delayed Tariff Refunds

BMW lowers its 2025 profit forecast as weaker Chinese sales and postponed EU-US tariff refunds cut margins and cash flow. Home » BMW Issues...



BBC

Trump lowers tariffs on China and announces end to 'rare earths roadblock' after Xi meeting

The US president says: "On the scale from zero to 10, with 10 being the best, I would say the meeting was a 12." Beijing says the results...



Cybersecurity Dive

Jaguar Land Rover attack cost British economy \$2.5 billion

The Cyber Monitoring Centre warned that losses could rise further if the company's production isn't back to pre-incident levels by January.



Reuters

Bosch to cut 13,000 jobs to bring down costs in tough autos market

Germany's Robert Bosch (ROBG.UL) will cut 13000 jobs as the world's top autos supplier battles a sluggish market, high costs and pressure...



Al Jazeera

One month into a US government shutdown – how it's going so far

The US government has been shut down for 30 days. Al Jazeera visualises where things stand right now.



CNBC

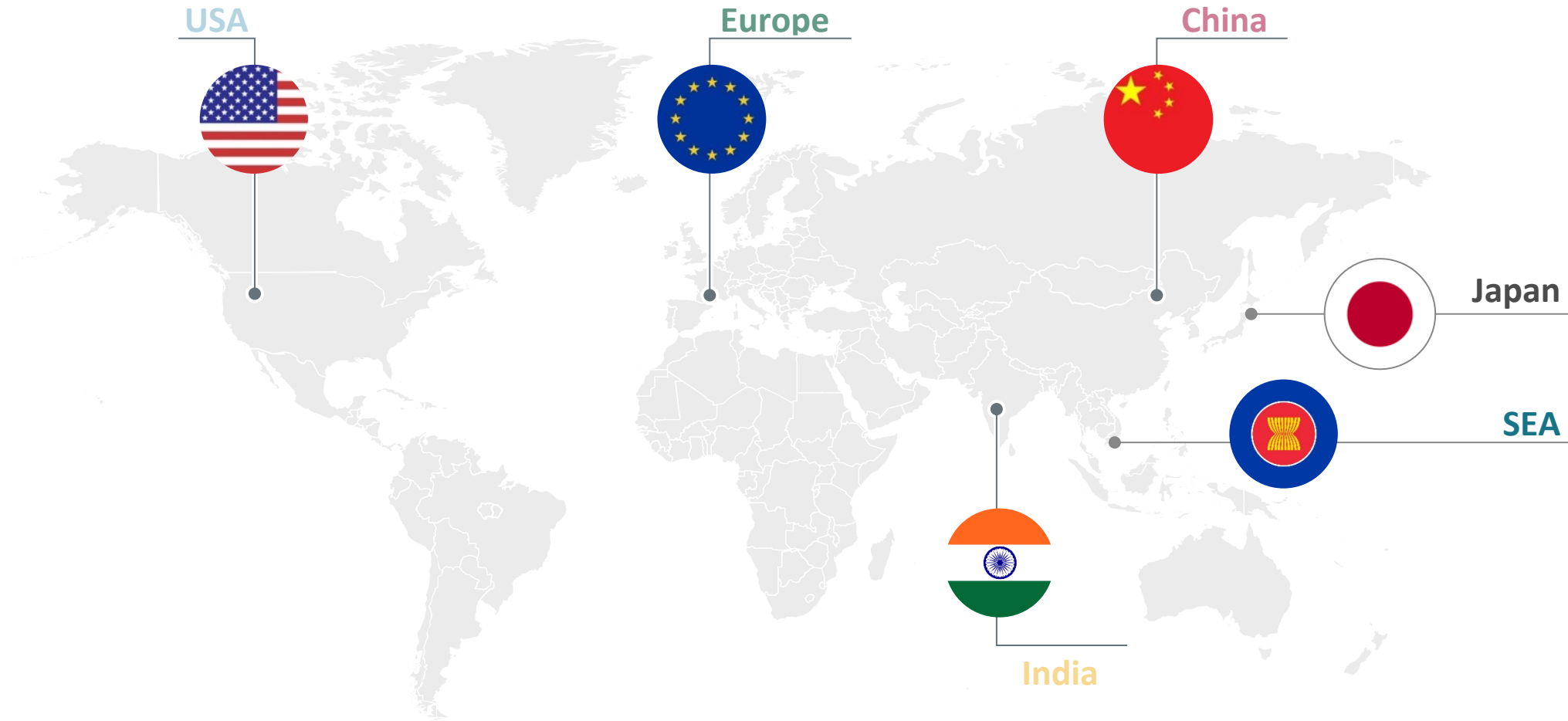
Auto giant Volkswagen warns of output stoppages amid Nexperia chip disruption

Volkswagen on Wednesday warned of temporary production outages citing China's export restrictions on semiconductors made by Nexperia.



MARKET DEVELOPMENT

Status quo of the global automotive industry



GLOBAL AUTOMOTIVE INDUSTRY



Market in China: Growing E-mobility and overall

USA



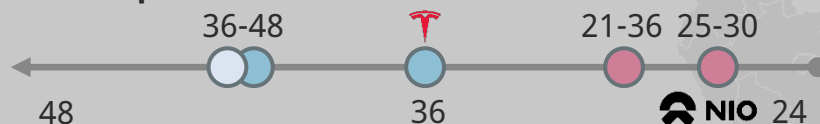
Europe



China

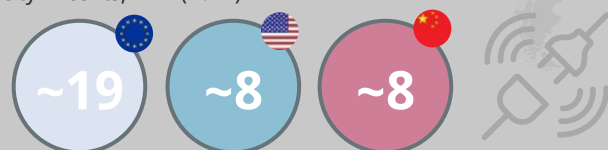


Development time



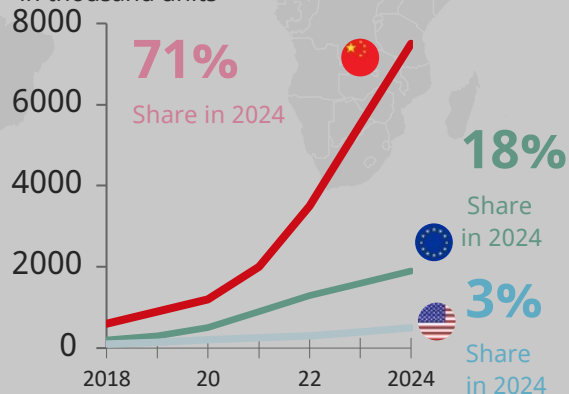
Energy costs

Industrial electricity in cents/kWh (2024)



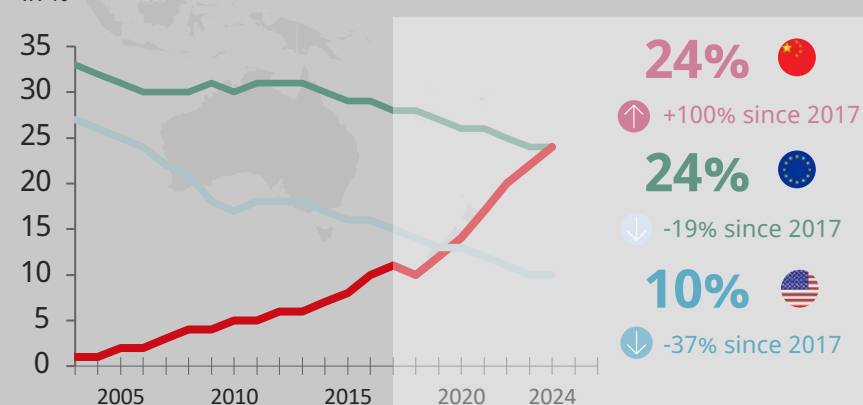
BEV Sales

in thousand units



Global market share of passenger cars

in %



GLOBAL AUTOMOTIVE INDUSTRY



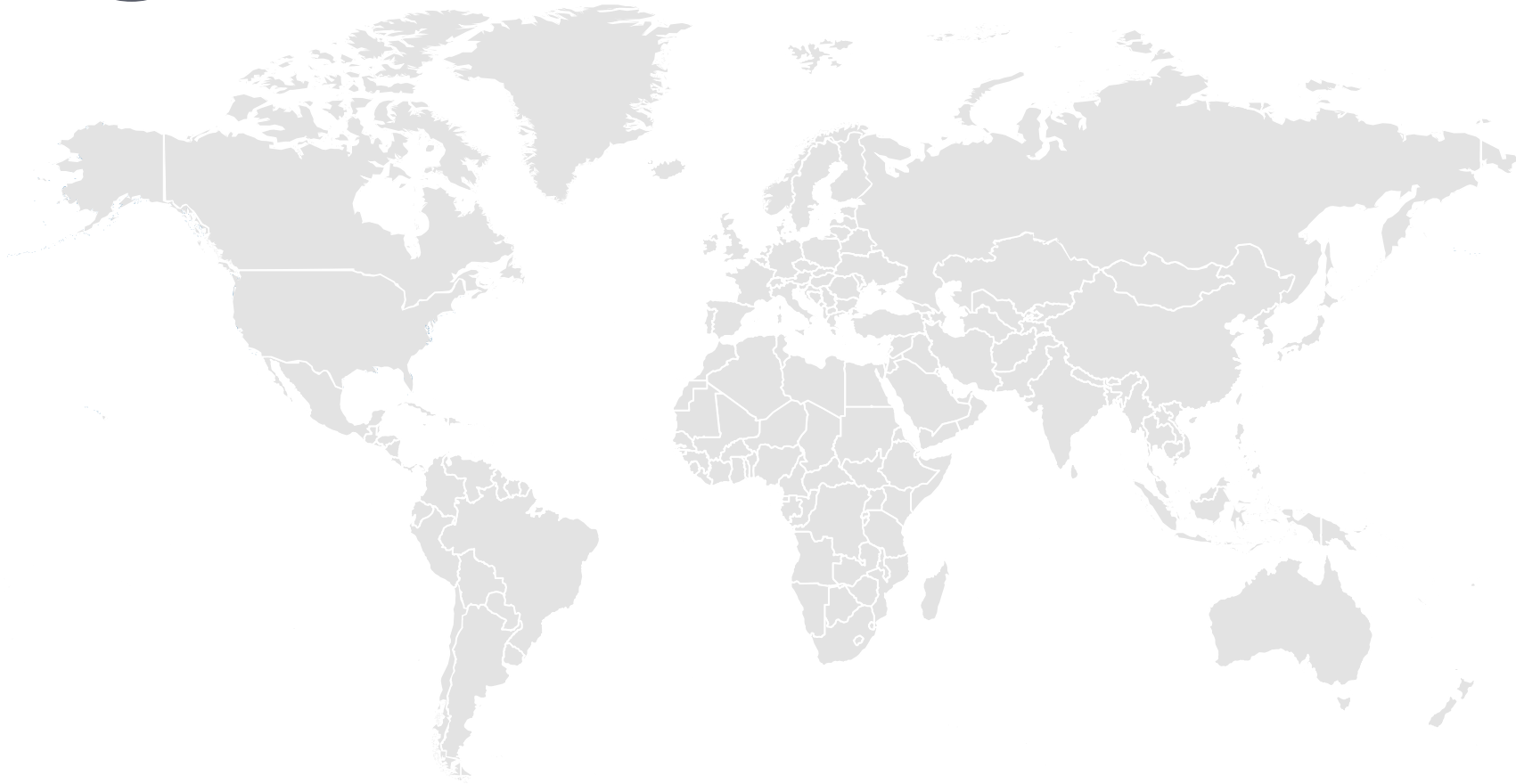
The Americans
"PROMOTE"



The Europeans
"REGULATE"



The Chinese
"PLAN"

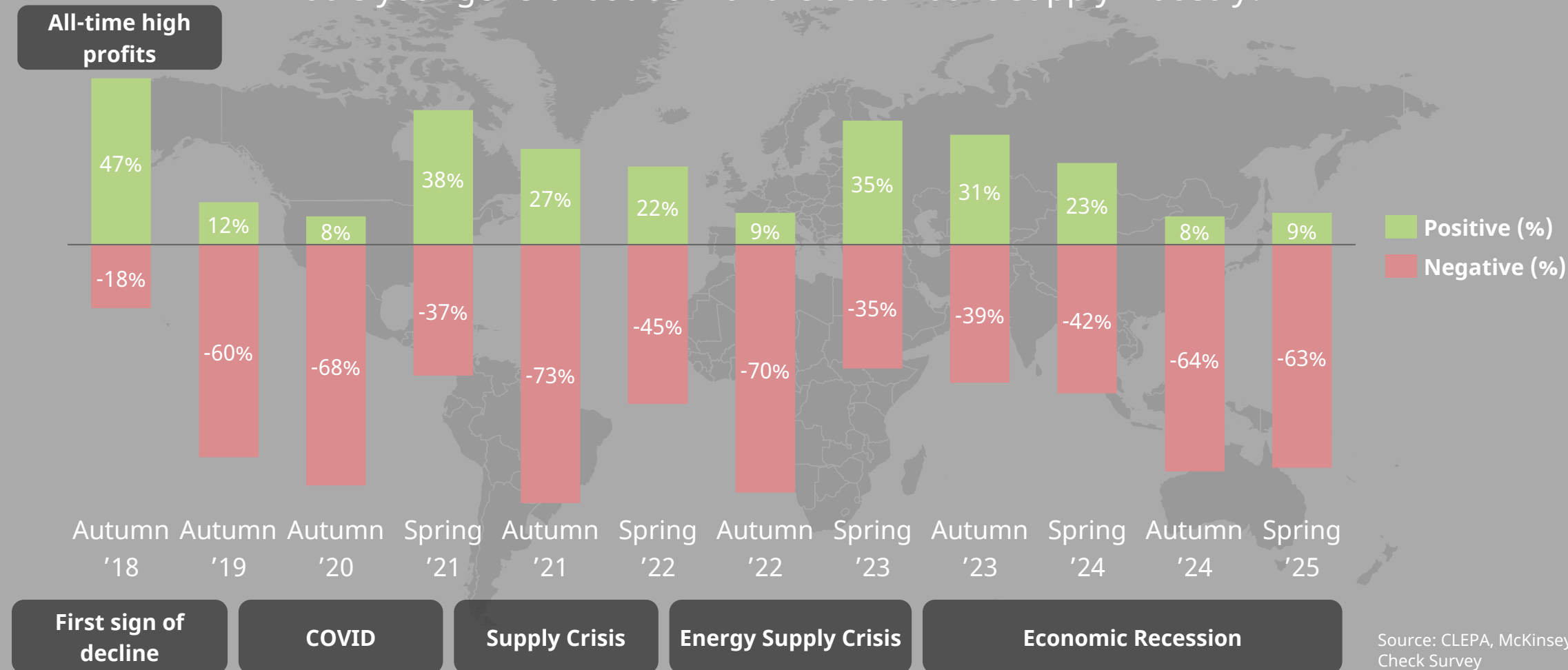


GLOBAL AUTOMOTIVE INDUSTRY



Mood in Europe—The CLEPA Pulse Check

What is your general outlook for the automotive supply industry?



Source: CLEPA, McKinsey Pulse Check Survey

GLOBAL AUTOMOTIVE INDUSTRY



Mood in Europe—The CLEPA Pulse Check

How significantly will your company be affected by the following aspects over the next 12 months?

WELT

**"The fate of Europe's auto industry
will be decided this year"**

Die Welt | 12.05.2025



**"Daimler Truck cuts jobs
at all German plants"**

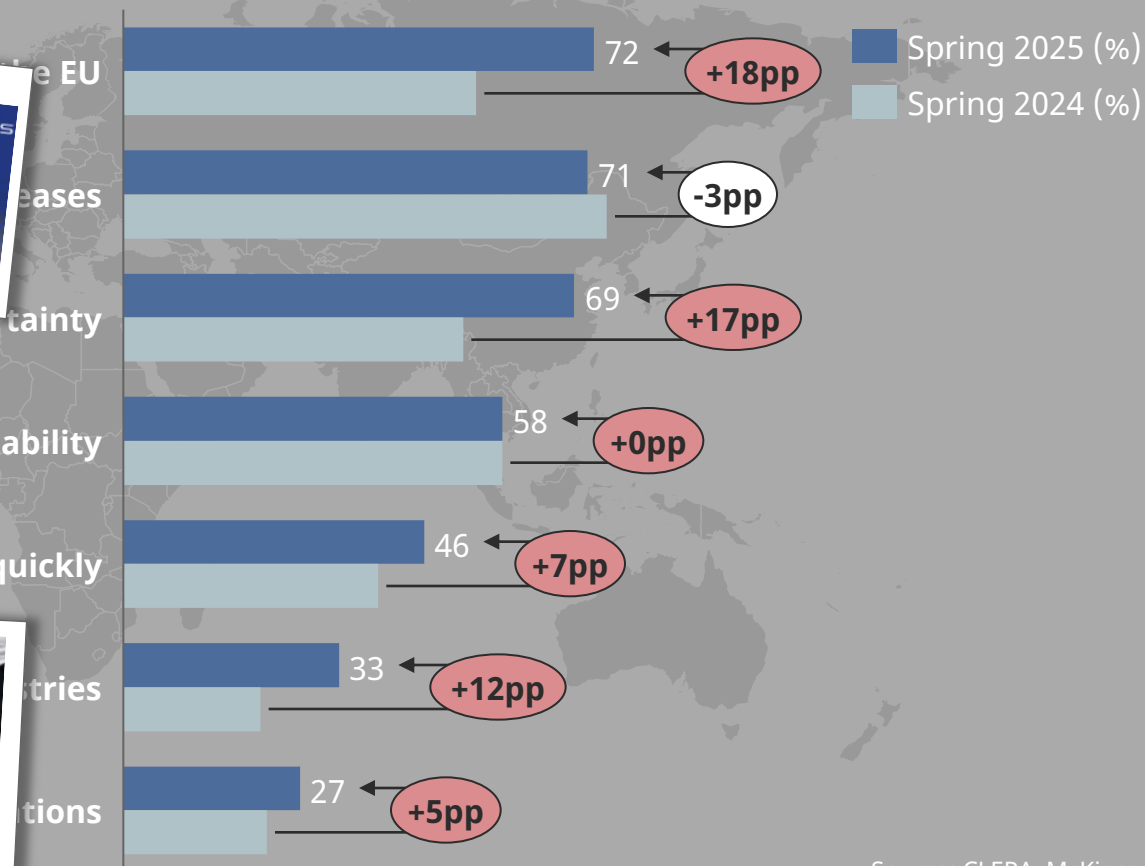
Frankfurter Allgemeine Zeitung | 10.05.2025



manager magazin

"Auto suppliers under pressure"

Manager Magazin | 01.05.2025



Source: CLEPA, McKinsey Pulse Check Survey

STATUS OF DISCUSSIONS IN BRUSSELS



European Car Summit



1st Strategic Dialogue



2nd Strategic Dialogue



3rd Strategic Dialogue



20.11.
2024

15.01.
2025

30.01.
2025

14.02.
2025

03.03.
2025

05.03.
2025

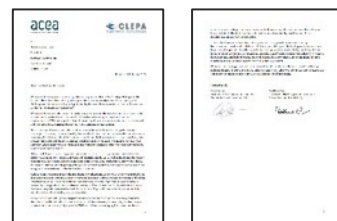
12.09.
2025

12/
2025

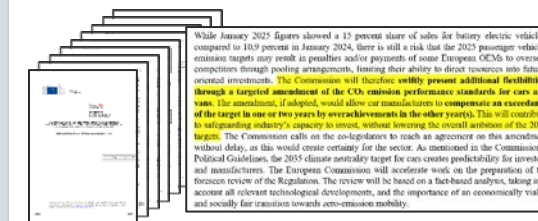
Meeting Commissioner Tzitzikostas



ACEA & CLEPA joint letter



Automotive Action Plan



10 December 2025!

4th Strategic Dialogue
Digital & Environmental Omnibus,
Auto-Package:

Revision of CO₂-Regulation, Industrial Accelerator Act, Automotive Omnibus, Clean Corporate Fleets. Also: Battery Booster, Strengthening CBAM etc.

STATUS OF DISCUSSIONS IN BRUSSELS



**A lot of work ahead:
Political Debate will dominate
2026 + 2027**

RESTORING COMPETITIVENESS



I
**Closing the
Innovation
Gap**

II
**A Joint Plan for
Decarboniza-
tion and
Competitive-
ness**

**DRAGHI
REPORT**

III
**Increasing
Security and
Reducing
Dependencies**

The future of European competitiveness

Part B | In-depth analysis and recommendations

The future of European competitiveness

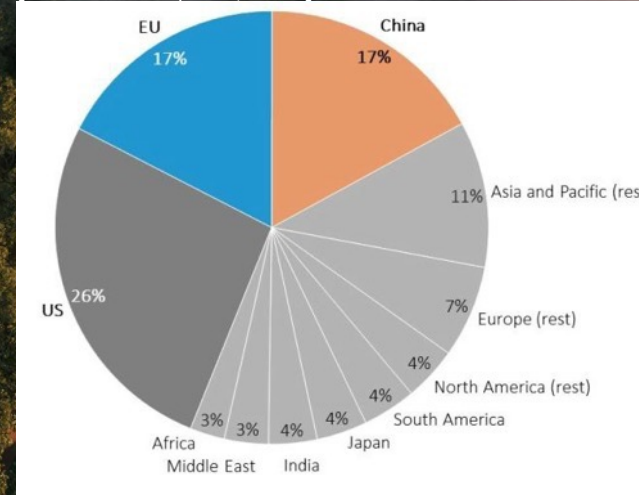
Part A | A competitiveness strategy for Europe

SEPTEMBER 2024

The future — of European competitiveness



Share of World GDP
[GPD at current prices, 2023]



THE IMPORTANCE OF COMMUNITY

12 national associations

ACS
Associazione Nazionale
Costruttori Automobilistici Italiani

SDCM

rai

sernauto

ILEA
BY FEDIL

CANFIA
Associazione Nazionale
Filiera Industria Automobilistica

VDA Fiev

AGORIA

AUTIG

afio

FKG

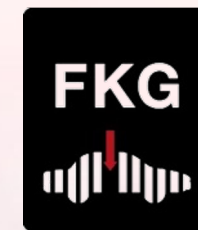


20. 11. 2025

SDCM

14.01.2024

VDA



10.10.2024

CANFIA
Associazione Nazionale
Filiera Industria Automobilistica

11.12.2024

WE ARE PANEUROPEAN



Sustainability

Competitiveness
Asia/Africa

NAC
(National
Associations
Committee)
FOCUS
AREA 2025

Drivetrain
transition

Cooperation
with the
OEM

Artificial
Intelligence

WE CONTRIBUTE



Unlocking competitive and digital services for affordable mobility

Advancing sustainability in automotive innovation

CLEPA White Paper

Adapt vehicle safety regulations in the digital age

Ensuring a technology-open regulation to decarbonize transport

Boosting resilience and industrial competitiveness

**ABOUT
CLEPA
FOCUS
2024 - 2029**

Thank you!

CLEPA

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X [@CLEPA_eu](#)