

Automotive in Transition: New Players, New Technologies, New Rules.

Prof. Dr. Stefan Bratzel

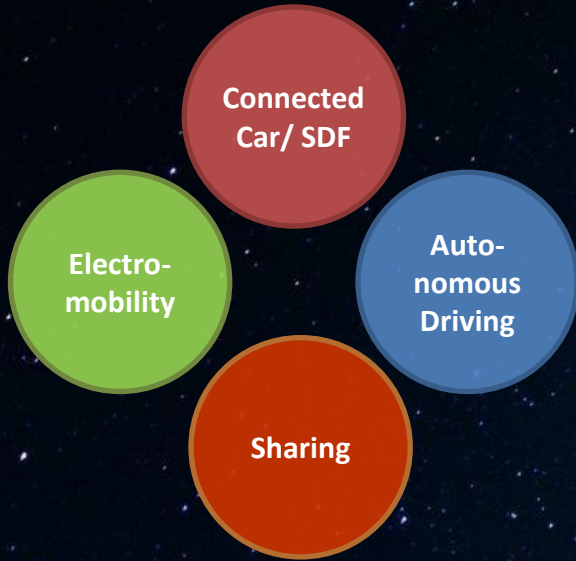
ECG
CONFERENCE
2026

WINDS OF CHANGE
Understanding tomorrow,
navigating towards the future.

Copenhagen, 15/16 September 2026



Transformation of the Automobile Industry



New Challenges

Co

Competencies

Co

Cooperations

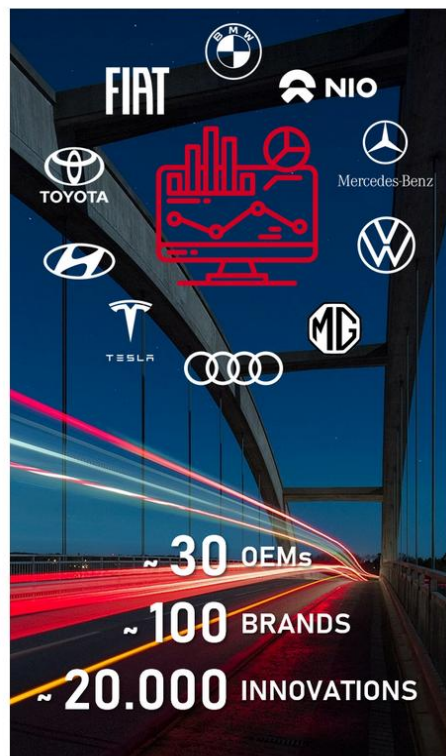
C O

Culture of the Company

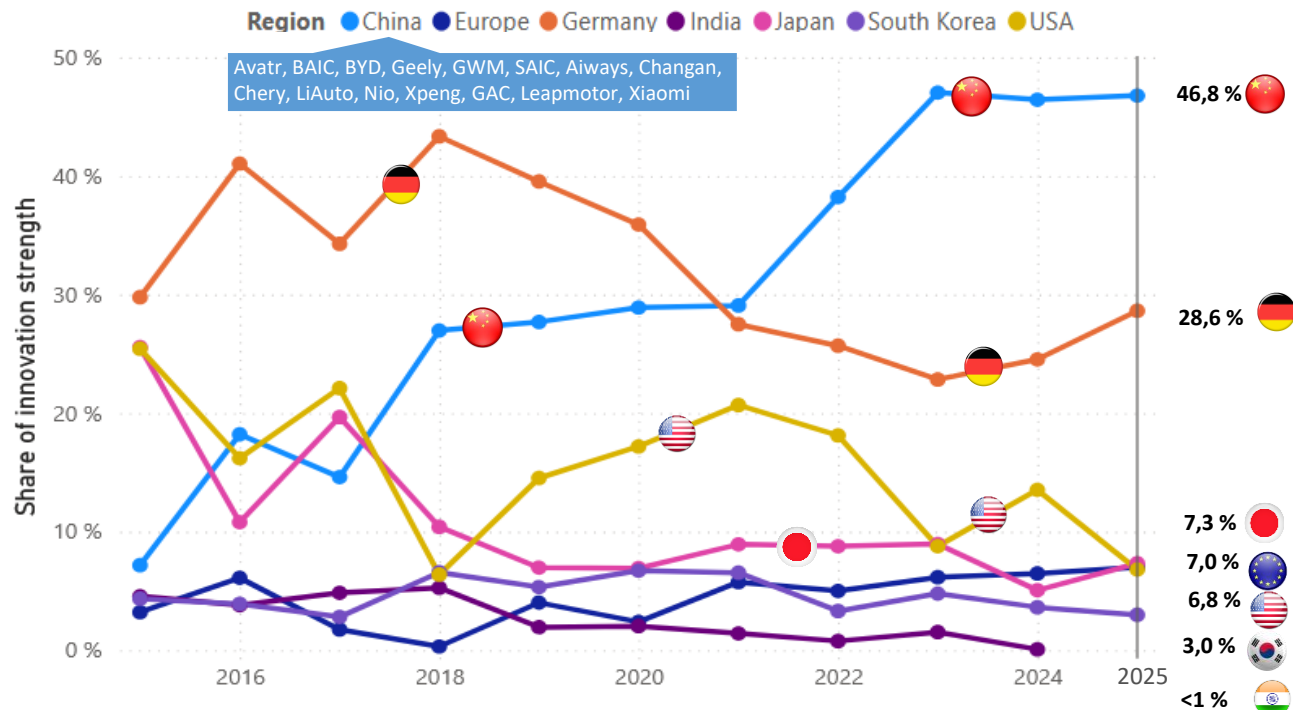
Organisational structures

Innovation as a Forward-Looking Indicator: A Comparison of OEMs by Country Group

German car manufacturers must be at least as innovative and superior as they are expensive. However, in recent years, there has been a tectonic shift in innovation power in favor of Chinese automakers. Slight trend reversal of German OEMs since 2024.

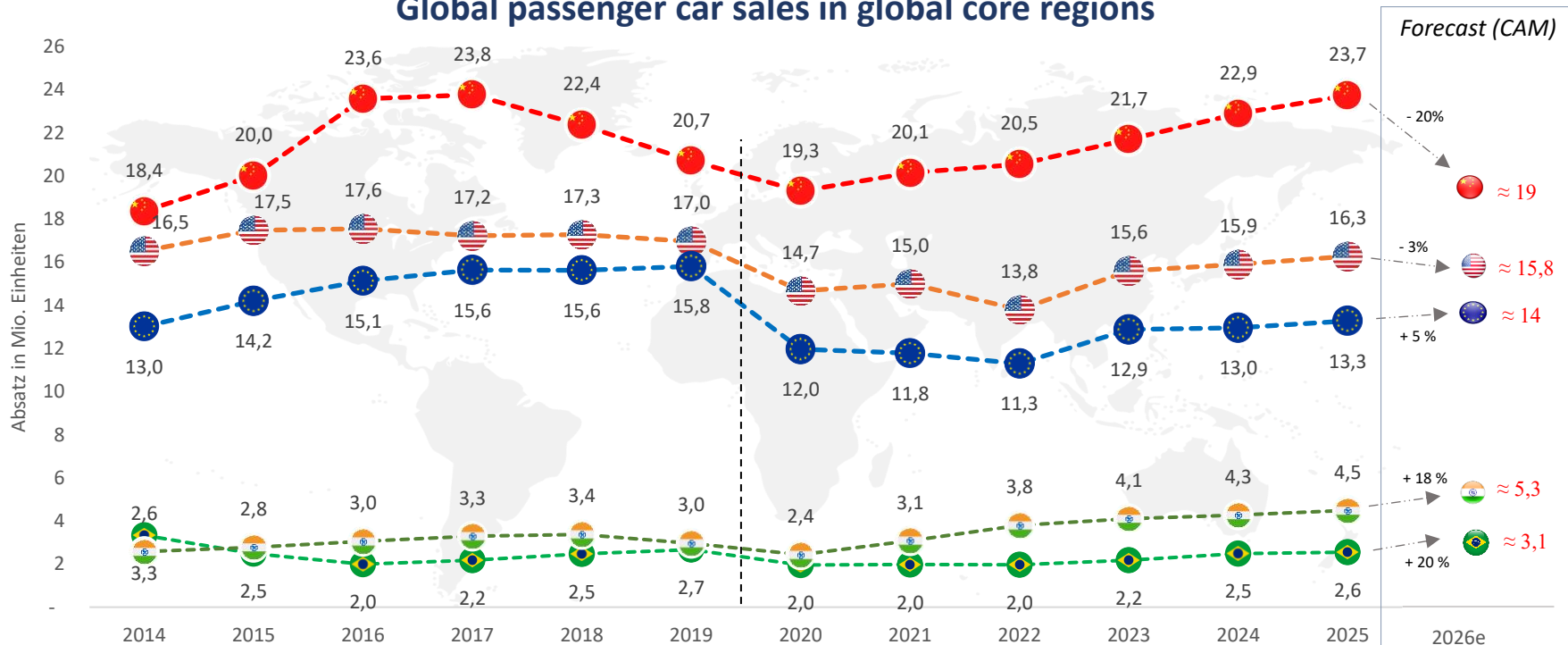


Innovation Strength of OEMs by Country/Region 2016 - 2025 (in %)*



China is experiencing strong momentum in car sales between 2020-2025, yet a massive 20% drop in sales is expected for 2026. In Europe, sales figures in 2025 remain nearly 2.5 million units below pre-pandemic levels, though they could rise by 5% in 2026.

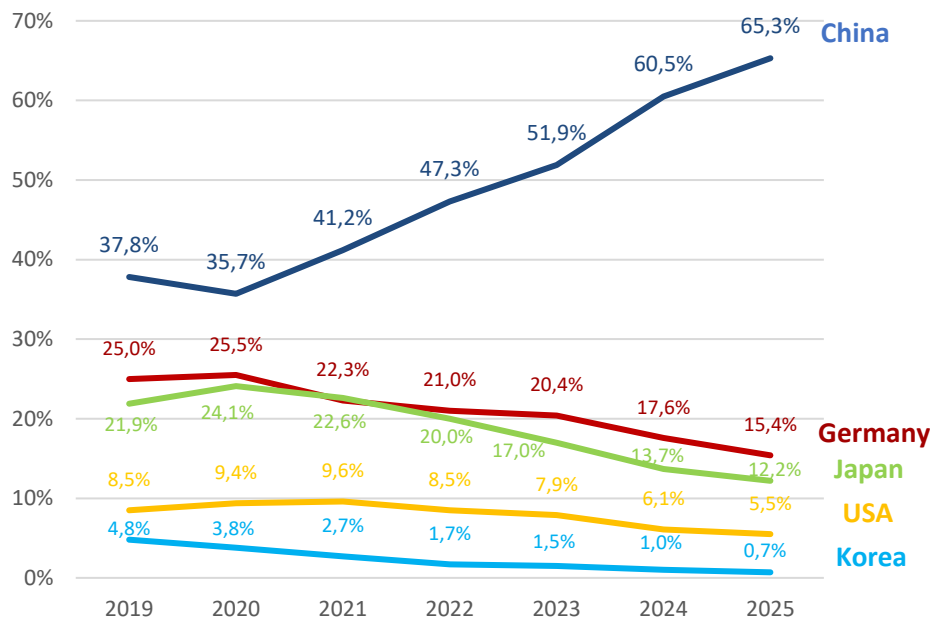
Global passenger car sales in global core regions



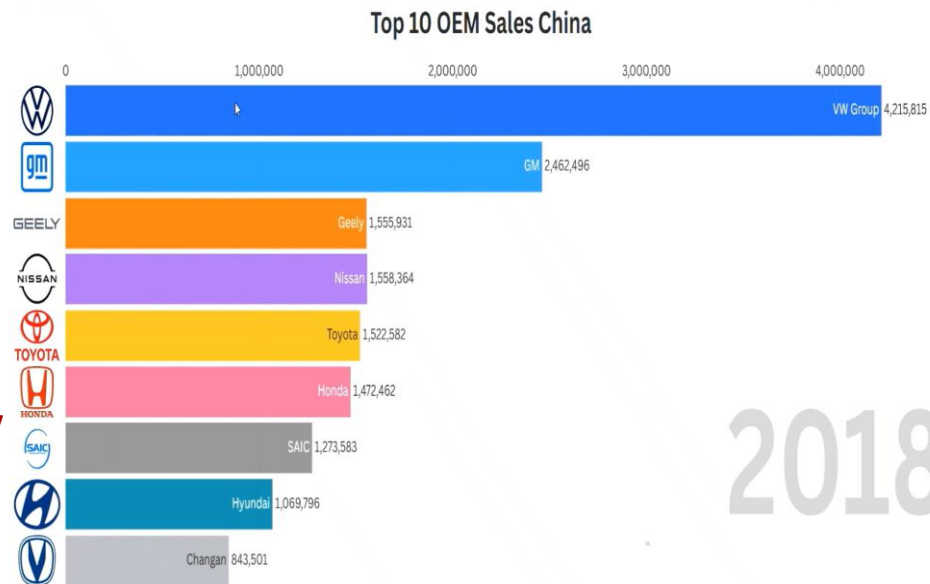
China's Automotive Market: "The Party Is Over"

Chinese manufacturers are increasingly dominating their home market, pushing out foreign OEMs.

Market Shares of Car Manufacturers in China by Country of Origin (in %) (2019 – 2025)



Passenger Car Sales of OEM Groups in China (2018 – 2025)



2018

Xiaomi SU7: From Smartphone to Electric Cars



The Xiaomi SU7 became the star of “Auto China” 2024: Cumulative sales between April 2024 - June 2026 reached 406,000. In H1 2026 Xiaomi SU7 delivered 80,496 units, Porsche Taycan 6,210 units. Market entry in Europe is planned for 2027.



Price: from €28,000



Price: from 102.600 €

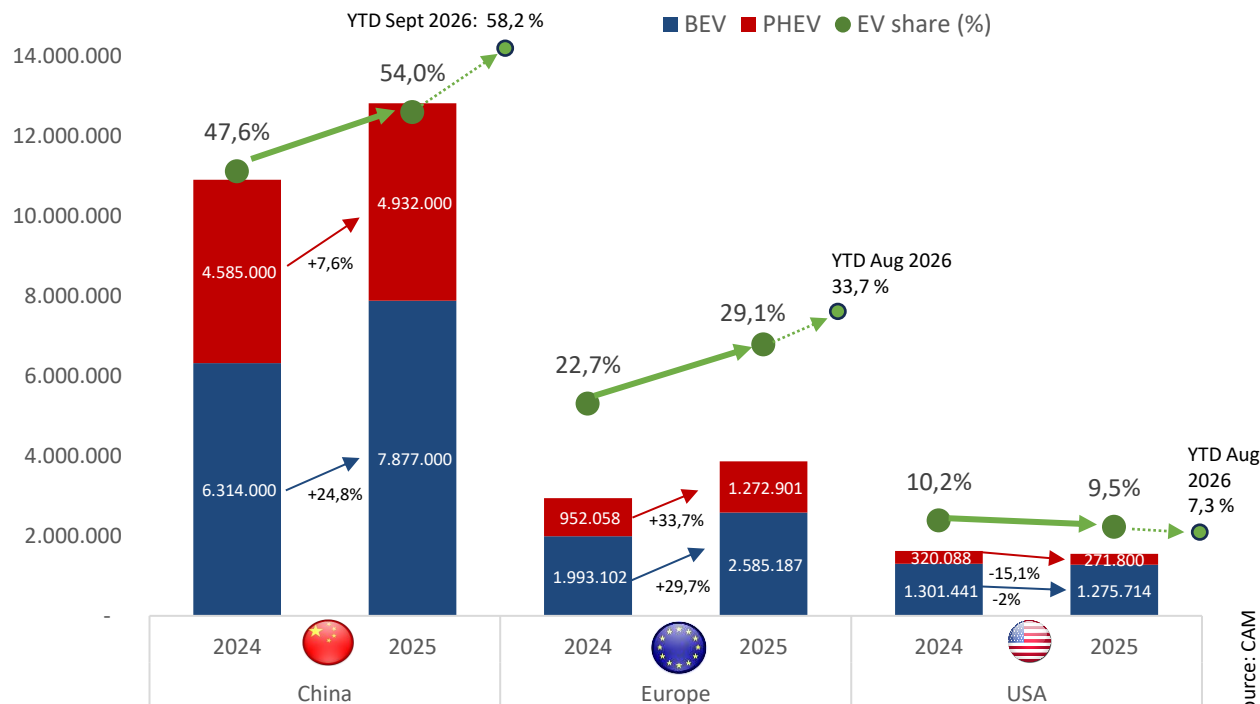
- Range: 668–830 km (CLTC/China standard)
- Charging time: 390 km in 10 min. – 800V battery by CATL (101 kWh)
- Acceleration: 0–100 km/h in 2.78 seconds / Top speed: 265 km/h.
- Operating system: Xiaomi Hyper OS / Chip: Snapdragon 8295



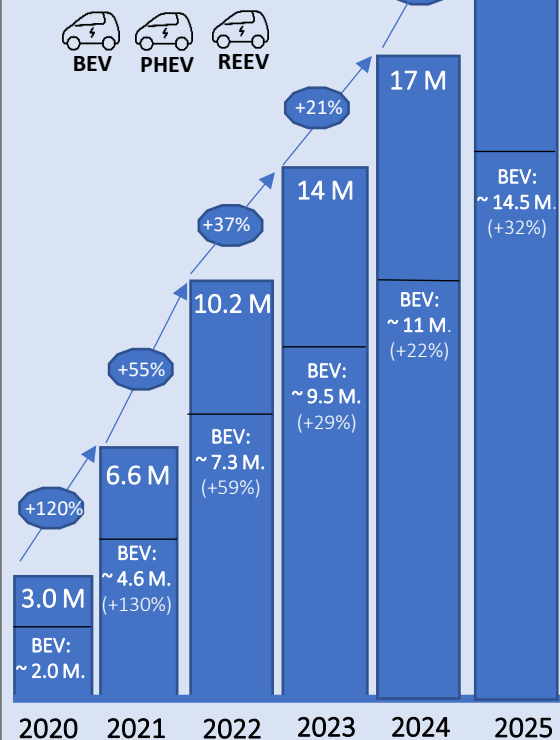
Electromobility is moving towards the global mass market – albeit at varying speeds.

As a leading market, China accounts for approx. 60% of global new registrations in the electric vehicle market (BEV/PHEV), strong growth in Europe / decline in the USA.

New EV registrations / market shares in core regions 2024/25



World market: New EV reg.

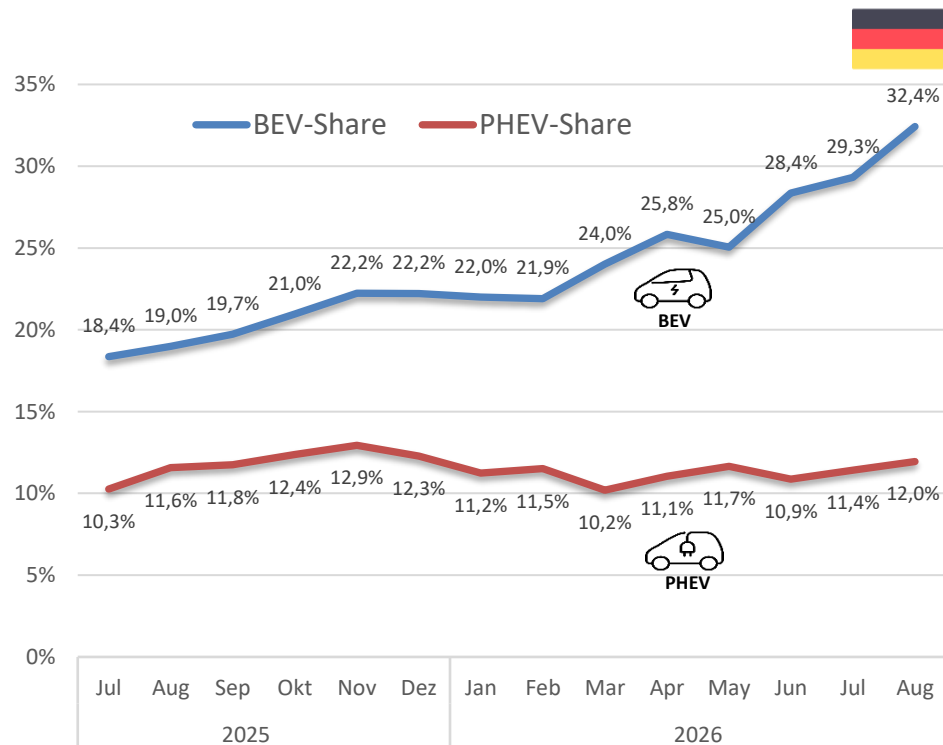


Europe ramping up at two speeds – in Germany, electromobility is gaining significant momentum following a period of uncertainty.

BEV SALES/BEV-SHARE H1 2026



New registrations of BEVs/PHEVs in Germany (%) | July 2025 – Aug. 2026



Source: CAM Electromobility Report 2026, KBA, ACEA.

Ranking: Innovation strength of global automakers in the electric vehicle sector (BEV)

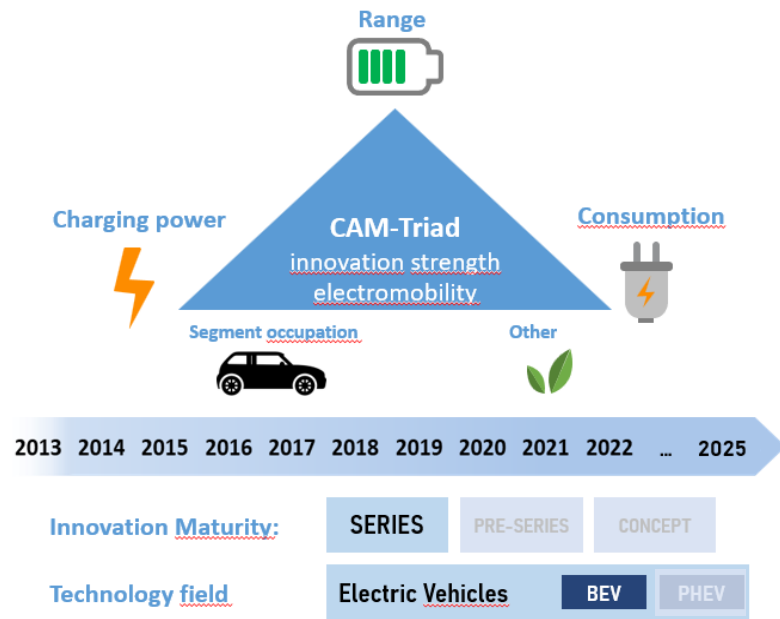


Geely is the most innovative group in the field of electromobility, followed by the Volkswagen Group and BYD. Over the past year, Germany has made massive strides in electric innovation strength and is now almost on par with Chinese OEMs.

Electric innovation strength* of global automotive OEM groups 2020–2025

#	PREVIOUS	OEM GROUP LEVEL	TOTAL*	TREND**	INDEX 2025	
1	2	Geely	208,8	↑	25,7	
2	1	VW Group	199,5	→	14,8	
3	4	BYD	171,2	↑	47,6	
4	6	SAIC	132,4	↓	1,7	
5	10	BMW	125,2	↑	47,3	
6	3	Tesla	118,8	↓	4,8	
7	7	MB Group	116,0	↑	31,8	
8	5	Hyundai	106,0	↘	7,1	
9	11	Renault	103,6	↑	48,4	
10	9	GM	92,5	↘	7,4	
11	8	Stellantis	92,5	↗	19,9	
12	12	Ford	68,1	→	13,6	
13	15	Xiaopeng	65,5	↗	22,2	
14	13	Nio	52,9	↓	1,7	
15	14	Lucid	46,0	↓	0,0	
16	16	Rivian	41,4	↓	0,0	
17	19	Toyota	40,4	↘	8,8	
18	17	GAC	39,7	↓	1,0	
19	27	Nissan	33,9	↑	24,1	
20	18	BAIC	31,9	↓	4,3	
21	20	LiAuto	25,5	↓	2,5	
22	22	GreatWall	18,5	↓	2,9	
23	23	Changan	17,9	↘	6,7	
24	21	Tata	15,4	↓	0,0	
25	24	Honda	13,6	↓	0,0	

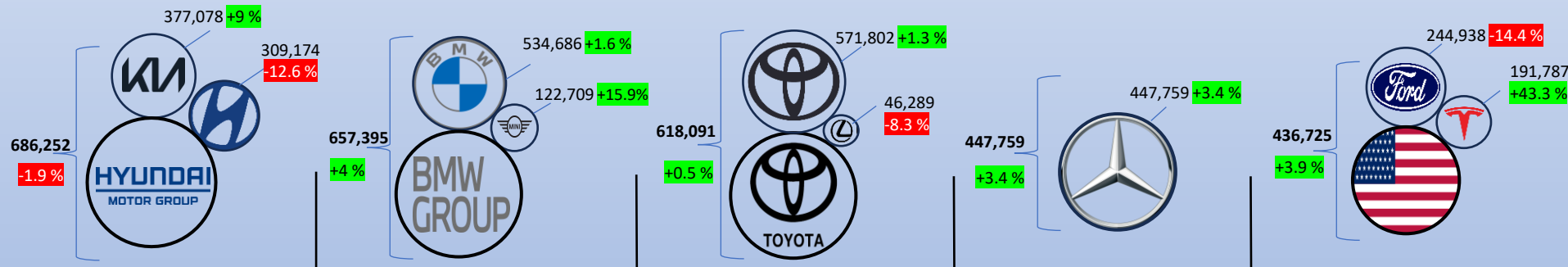
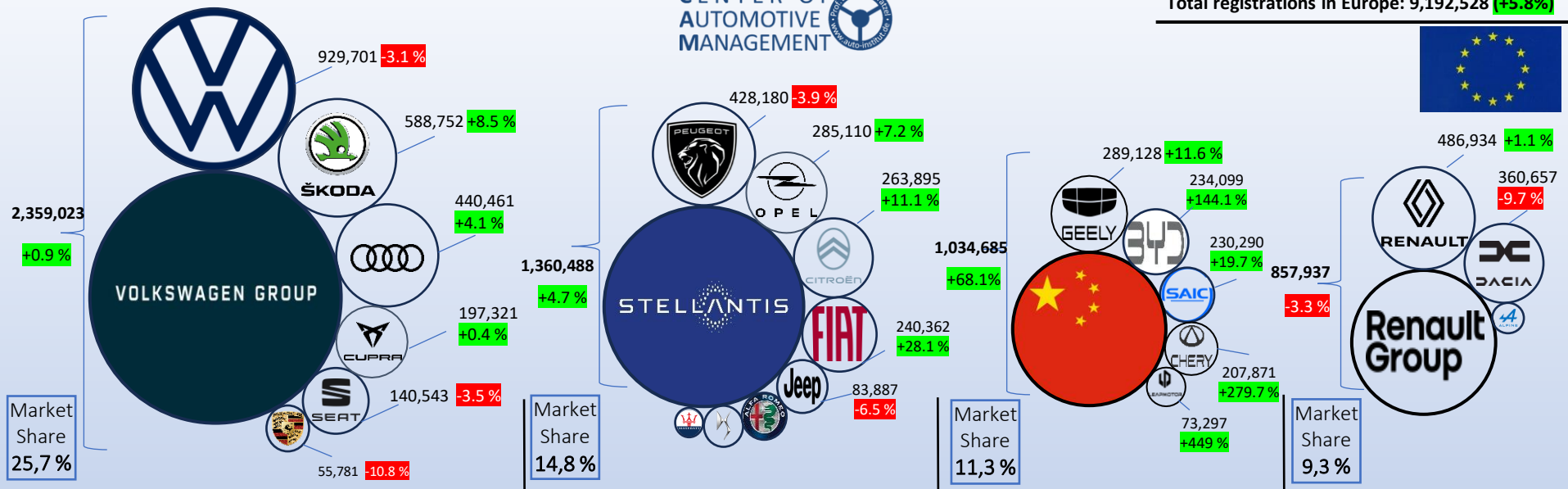
Methodology: Assessing Innovation Strength of global automotive OEM



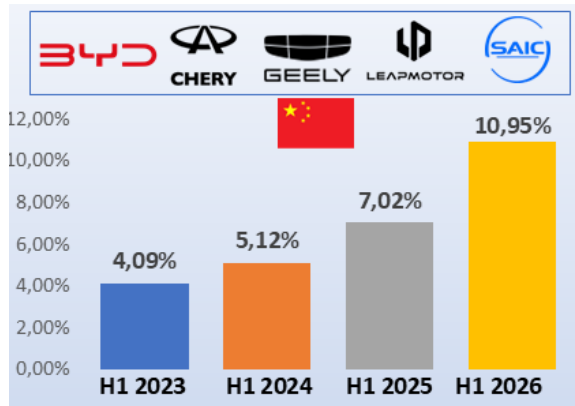
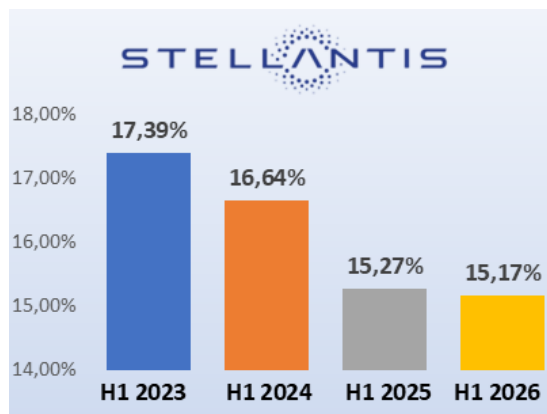
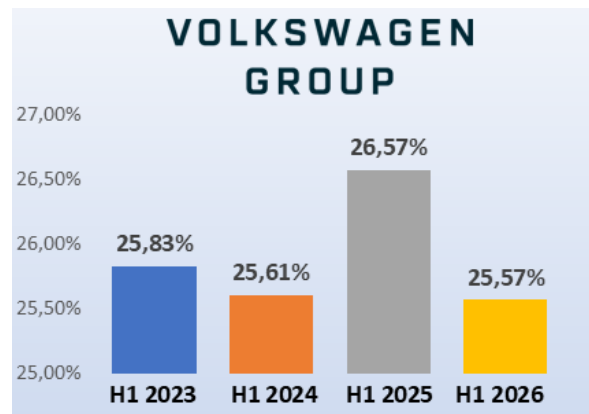
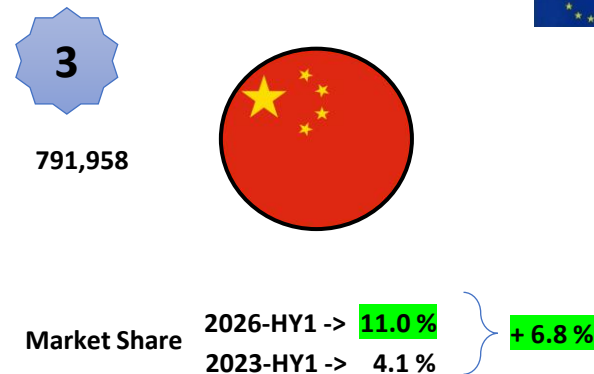
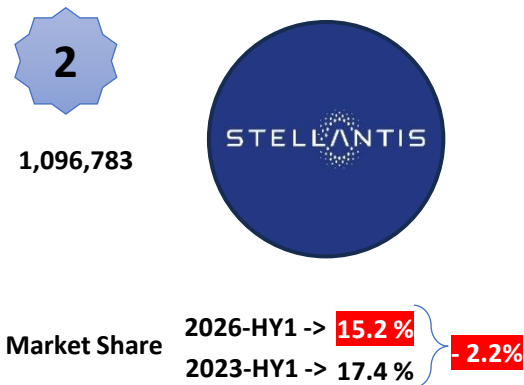
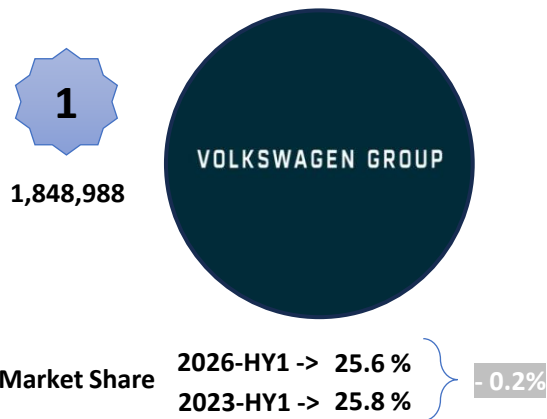
New registrations in Europe* (all powertrains) by selected groups/countries (Jan – Aug 2026/2025)

CENTER OF
AUTOMOTIVE
MANAGEMENT

Total registrations in Europe: 9,192,528 (+5.8%)



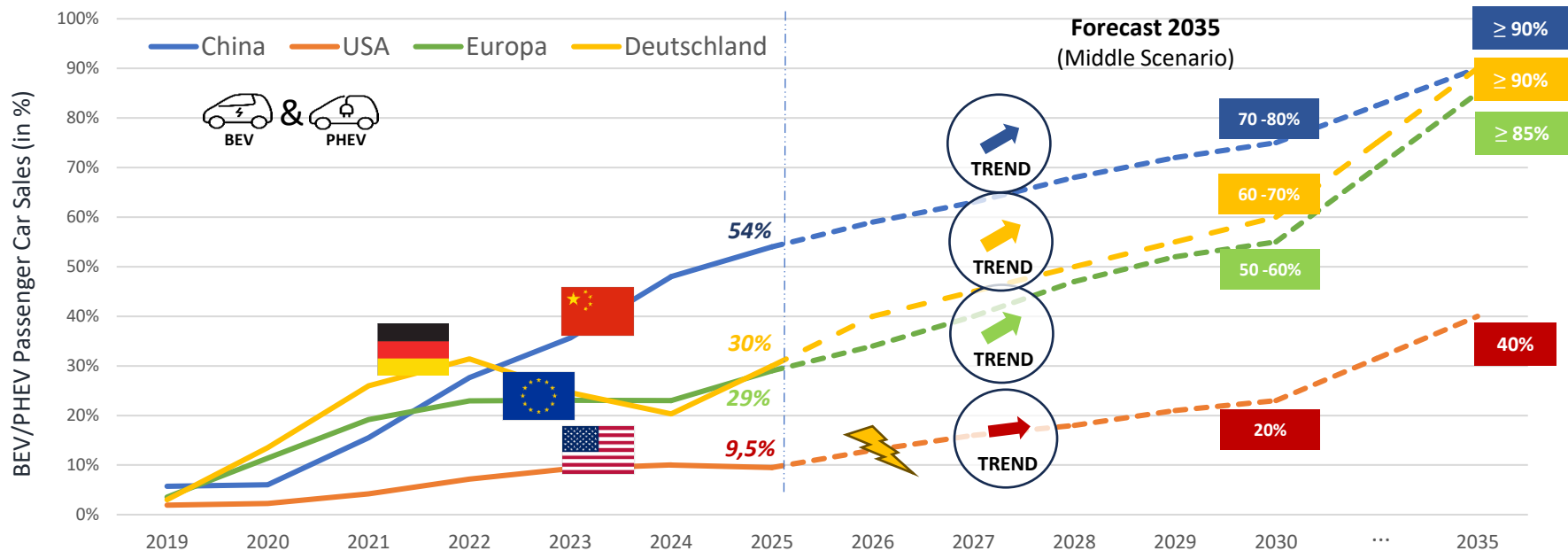
New registrations (all powertrains) in Europe* (7,232,066 units, +6,1%) by selected groups/countries, Jan – June 2026



Electromobility is prevailing technologically—now the speed of scaling is the deciding factor

By 2035, the share of electric vehicles in new registrations in China is expected to rise to 90%, while Europe could reach up to 85%. In the US, the share will likely rise to only around 40%.

Development / forecast (Base Case) of new registration shares for electric vehicles (BEV/PHEV) in key markets – China, Europe, Germany, and the USA (2019–2035)



Source: CAM Electromobility Report 2026. Note: Europe = EU+EFTA+UK; China: PHEV includes REEV.

"Smartphone-effect" for E-Mobility: The electric vehicle ecosystem offers new dimensions of customer benefits



To achieve strong customer acceptance—and above all, enthusiasm—for battery electric vehicles (BEVs), the focus must shift to new dimensions of customer value: benefits that internal combustion engine (ICE) vehicles simply cannot offer.



Smart Charging

Charging at low-cost times and high availability of renewable energy.



Vehicle-to-Home (V2H)

The vehicle supplies power to the home during times of high demand.



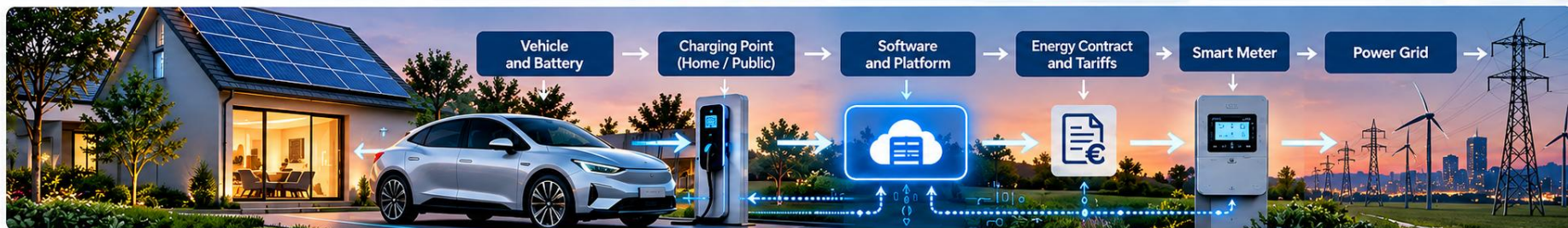
Vehicle-to-Grid (V2G)

Vehicles provide flexibility to the power grid.



PV Integration

Solar power is intelligently distributed between the household, storage and the vehicle.



Integrated Offering for the Customer



Vehicle

+



Wallbox + Installation

+



Electricity Tariff

+



Public Charging

+



Plug & Charge

+



PV System

+



Home Storage

+



Smart Charging

+



Vehicle-to-Grid (V2G)

New Players in the Ecosystem



Automotive Manufacturers (OEMs)
Vehicles, batteries, software, integrated ecosystems



Energy Companies
Electricity tariffs, flexibility, grid integration



Charging Infrastructure Operators (CPOs)
Public and private charging



Battery Manufacturers
Charging and storage technologies, second life

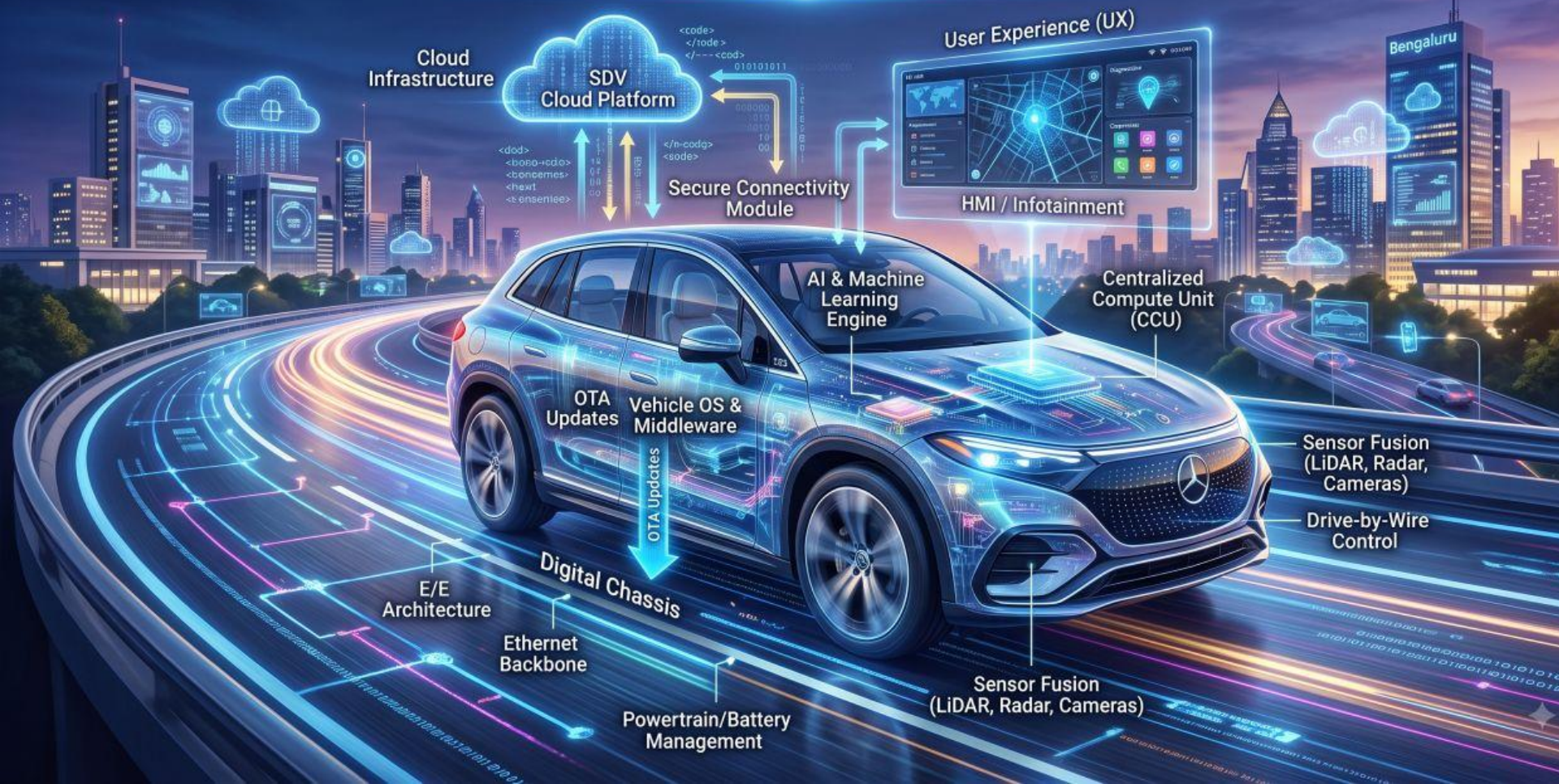


Technology Platforms
Software, data, energy management, AI



New Mobility Providers
Services, fleets, mobility and energy platforms

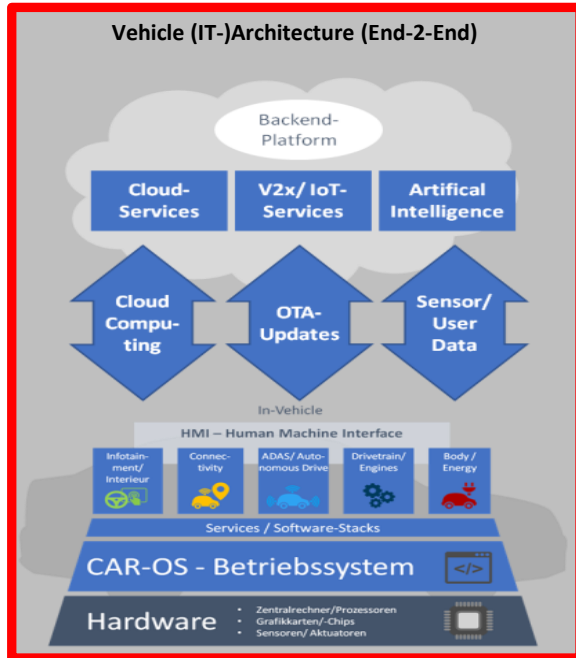
SOFTWARE DEFINED VEHICLE



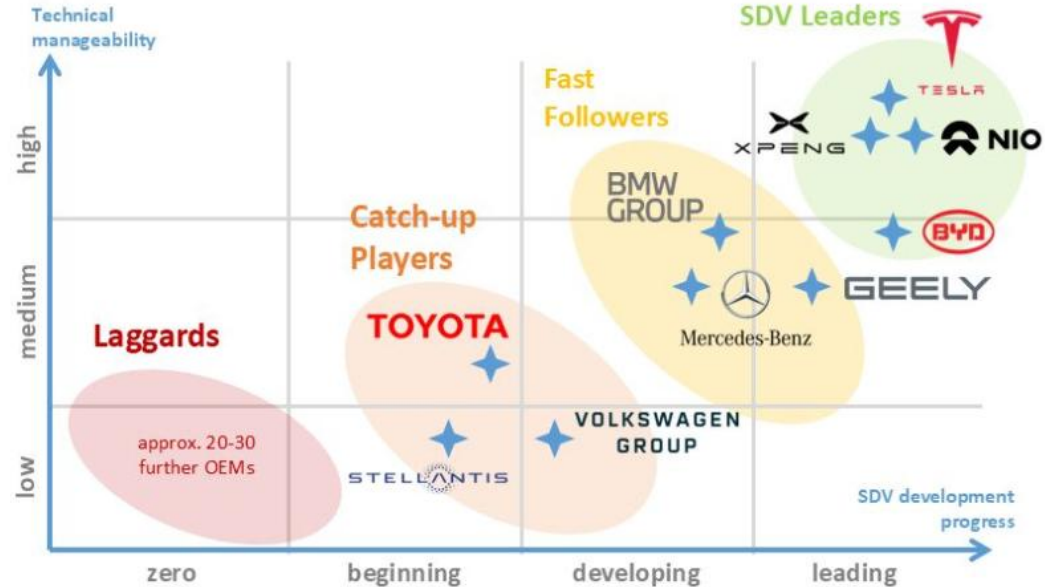
Centralized/zonal E/E architectures as the basis of the “Software-/ AI- Defined Vehicle”

Vehicles are like “phones on wheels” and will need be constantly updated/upgraded, and this has an impact on the value of those assets, for consumer/drivers and for key players of the ecosystem.

Future E/E vehicle architecture from OEMs



Software-Defined-Vehicles: Assessment matrix of selected OEMs



Autonomous Driving: Robotaxi / Roboshuttles – Evaluation of key players

Alphabet and Baidu—with Waymo and Apollo, respectively—are the clear leaders in the competence dimensions of "autonomous driving system" and "autonomous driving service". Europeans lag far behind.

AUTONOMOUS DRIVING - AS OF OCTOBER 2026

The Robotaxi Pioneers

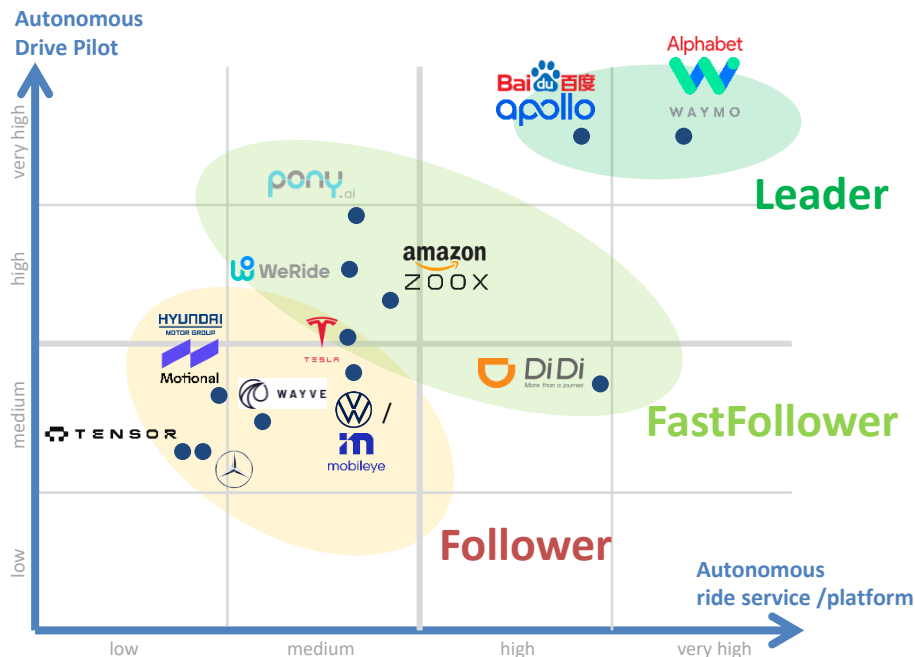
Six players shape the market across two camps: the US, led by Waymo, and China, where Apollo Go, Pony.ai and WeRide are increasingly expanding abroad.

Fleet size (vehicles, approx.)

Waymo	4,000
Pony.ai	1,975
WeRide	1,300
Apollo Go	>1,000
Tesla	~480*
Zoox	~100

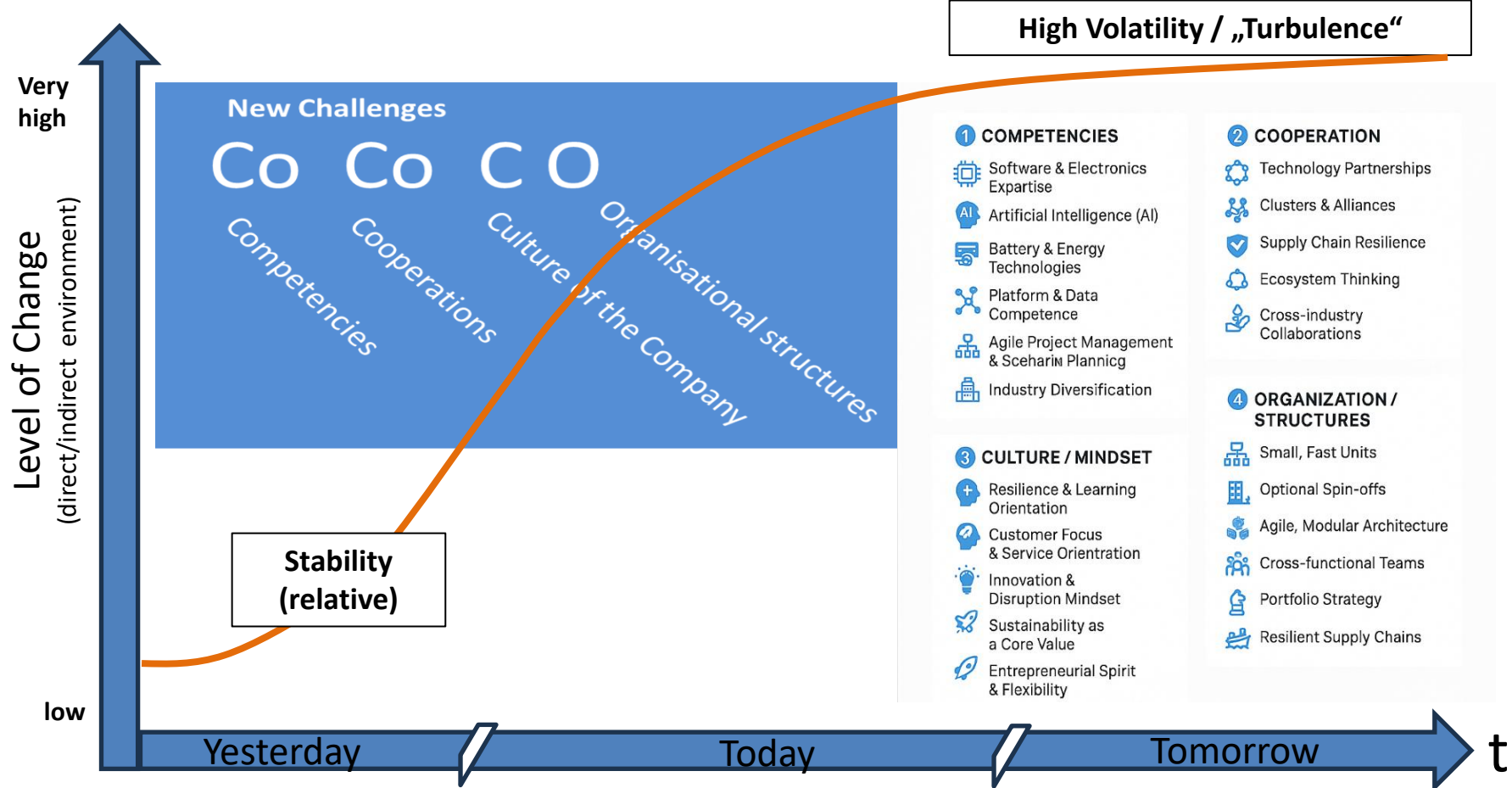
■ USA ■ China * registered in Texas

Autonomous Driving (Level 4/5): Competence Ranking of Key Players



Quelle: CAM CCI Report 2025 /2026

Challenges in an era of volatility & disruptive change in the automotive world



Conclusion: Key trends shaping the future of finished vehicle logistics



The Future Finished Vehicle Logistics Value Chain



Biggest Implications for Finished Vehicle Logistics (Next 5–10 Years)

- 1** **Changed global flows**
New production locations, more Asian imports and regionalized distribution networks
- 2** **New EV requirements**
Charging infrastructure, battery handling, software updates and digital vehicle management
- 3** **Massive automation potential**
Physical AI, autonomous vehicle movements and AI-optimized operations in ports, compounds and transport
- 4** **Higher complexity and volatility**
Growing model diversity, shorter cycles and geopolitical risks require greater flexibility and resilience

Capabilities OEMs Will Expect from Logistics Partners by 2035

- 1** **End-to-end digital visibility**
Real-time data, predictive analytics and seamless system integration
- 2** **Flexible and resilient networks**
Fast adaptation to changing markets, production locations and trade regulations
- 3** **AI-driven operations**
Highly automated compounds, autonomous transport and intelligent process control
- 4** **EV and software expertise**
Charging, battery diagnostics, software management and digital vehicle preparation
- 5** **Integrated value-added services**
Inspection, customization, refurbishment and full lifecycle fleet management



LinkedIn Thought Leadership

with Prof. Dr. Stefan Bratzel

Visibility, Relevance and Trust
in the Automotive Industry

Center of Automotive Management (CAM)



Our sample LinkedIn series



Automotive

Stefan Bratzel, Prof. Dr. • 1st
Automotive Innovation Expert | Director Center of Automotive Mana...
Visit my website
2w • 6

de German Innovation Leadership: **BMW Group** and **Mercedes-Benz AG** Take Two Distinct Paths
Our Automotive Innovation Radar for 2021–2025 examines how ...more

Innovation profiles of selected OEMs in comparison (2021–2025)
Mercedes shows a broader, high-level innovation strategy. BMW focuses on specific fields

Automotive Innovation Radar 2021 – 2025

2w • 6

5 comments • 17 reposts

Stefan Bratzel, Prof. Dr. • 1st
Automotive Innovation Expert | Director Center of Automotive Mana...
Visit my website
2mo • 6

AutomotiveINNOVATIONS Report 2026: The Most Innovative Premium Car Models of 2026 ...more

AutomotiveINNOVATIONS Award
Main Prize: Most Innovative Car Models 2026

RANK
1st 2026: BMW iX
2nd 2026: Mercedes-Benz EQ
3rd 2026: Porsche Taycan
4th 2026: Audi e-tron GT
5th 2026: Tesla Model S

INNOVATIONS
1st 2026: BMW iX
2nd 2026: Mercedes-Benz EQ
3rd 2026: Porsche Taycan
4th 2026: Audi e-tron GT
5th 2026: Tesla Model S

2w • 6

6 comments • 8 reposts

Auto Market

Stefan Bratzel, Prof. Dr. • 1st
Automotive Innovation Expert | Director Center of Automotive Mana...
Visit my website
2mo • 6

European Automotive Market – Q1 2026: Mixed Signals Across OEM Groups ...more

New registrations in Europe by national group (Q1 2026/2025)

2w • 6

8 comments • 35 reposts

Stefan Bratzel, Prof. Dr. • 1st
Automotive Innovation Expert | Director Center of Automotive Mana...
Visit my website
1mo • 6

de CAM E-Mobility Report 2026 – TOP 5 BEV Sales in Germany | Jan–April 2026 ...more

TOP 5 BEV Sales and List Price Segmentation in Germany Jan – April 2026

	Deliveries Jan–April Germany	Electric Range (km)	Price Base Model	Charging Time for 80% (Min.)
EUROQ	13.740	573	44,180 €	28
ID.3	11.676	388	33,330 €	30
MODEL Y	11.268	537	39,990 €	24
ID.7	10.458	619	54,105 €	28
ENYAQ	10.331	578	48,900 €	28

2w • 6

13 comments • 11 reposts

Technology Focus

Stefan Bratzel, Prof. Dr. • 1st
Automotive Innovation Expert | Director Center of Automotive Mana...
Visit my website
2d • 6

The Software-Defined Future: Central Computers Are Becoming the New Industry Standard
In the Software-Defined Vehicle era, the race is not only about ...more

The Software-Defined Future: Racing Toward the AI-Driven Vehicle

In collaboration with Accenture

Seven success factors for SDVs

- Unified software platform
- OTA updates
- Central Computer Strategy
- Vehicle AI integration
- Strategic SDV partnerships
- SDV company culture
- SDV oriented organization

Central computer strategy – selected OEMs in comparison

OEM	Platform	SDV	DESCRIPTION
VOLKSWAGEN GROUP	CEA	3	High level SDV platform for all VW Group vehicles, including commercial vehicles, with a focus on software-defined vehicles.
Renault Group	Renault	2	High level SDV platform for all Renault vehicles, including commercial vehicles, with a focus on software-defined vehicles.
TOYOTA	Arise	2	High level SDV platform for all Toyota vehicles, including commercial vehicles, with a focus on software-defined vehicles.
STELLANTIS	STLA ABC	2	High level SDV platform for all Stellantis vehicles, including commercial vehicles, with a focus on software-defined vehicles.
Mercedes-Benz	Mercedes	1	High level SDV platform for all Mercedes-Benz vehicles, including commercial vehicles, with a focus on software-defined vehicles.
MAHLE	MAHLE	1	High level SDV platform for all MAHLE vehicles, including commercial vehicles, with a focus on software-defined vehicles.
TESLA	Tesla	1	High level SDV platform for all Tesla vehicles, including commercial vehicles, with a focus on software-defined vehicles.
SKODA	SKODA	1	High level SDV platform for all SKODA vehicles, including commercial vehicles, with a focus on software-defined vehicles.
SEAT	SEAT	1	High level SDV platform for all SEAT vehicles, including commercial vehicles, with a focus on software-defined vehicles.
SKODA	SKODA	1	High level SDV platform for all SKODA vehicles, including commercial vehicles, with a focus on software-defined vehicles.

2w • 6

3 comments • 3 reposts

Stefan Bratzel, Prof. Dr. • 1st
Automotive Innovation Expert | Director Center of Automotive Mana...
Visit my website
1mo • 6

Automotive Innovations Ranking 2026 – CAM Study 2026 22nd Annual Study
Center of Automotive Management The results are in - and they're ...more

AutomotiveINNOVATIONS 2026 22nd Annual Study: Center of Automotive Management

Most Innovative Electric Cars* 2026

Model	Rank	Price (€)	Range (km)	Charging Time (h)
CLA	1	51,8	26,7	22,6
X3	2	792	805	10
HAN	3	12,3	15,1	18,5
LEAF	4	400	300	13,7
N*8	5	12,8	15,7	13,7

2w • 6

7 comments • 13 reposts

Newsletter

CENTER OF AUTOMOTIVE MANAGEMENT

presenting the:

AutomotiveCOMPASS

Report by Accenture and the Center of Automotive Management (CAM): The automotive industry on the cusp of the AI-defined...

Stefan Bratzel, Prof. Dr.

2w • 6

You and 38 others

CENTER OF AUTOMOTIVE MANAGEMENT

presenting the:

AutomotiveCOMPASS

CAM E-Mobility Report 2026 – China Vehicle Market Update

Stefan Bratzel, Prof. Dr.

2w • 6

You and 26 others

Company

Dr. Bratzel Center of Automotive Management GmbH & Co. KG (CAM)

Director: Prof. Dr. Stefan Bratzel

Responsible for the contents: Prof. Dr. Stefan Bratzel

Authors: Prof. Dr. Stefan Bratzel

Company Address

Center of Automotive Management

An der Gohrsmühle 25

51465 Bergisch Gladbach

Germany

Phone: +49 (0) 22 02 / 2 85 77 - 0

Fax: +49 (0) 22 02 / 2 85 77 - 28

E-Mail: info@auto-institut.de

Disclaimer and Copyright

All information in this survey has been carefully checked. It was written by use of scientific methods on the basis of the specified sources and literature. However, we cannot guarantee that the material contained is complete, correct and absolutely up to date. CAM rules out any liability for damages incurred directly or indirectly from the use of this survey.

All rights reserved. All contents (texts, tables, databases, images, graphics, as well as their grouping) in the survey is subject to the protection of copyright and other protection laws. The contents of this survey may not be duplicated, distributed, changed, or made accessible to third parties in any form beyond the limits of copyright law, without prior written approval of CAM. Only subject to these conditions the survey can be offered for a reasonable price, since it is the result of complex scientific research. The reproduction of usage names, trade names, and product identifications does not authorize the assumption that such names might be free according to trademark protection law and thus available for use by any person.

Copyright © 2026 by Center of Automotive Management