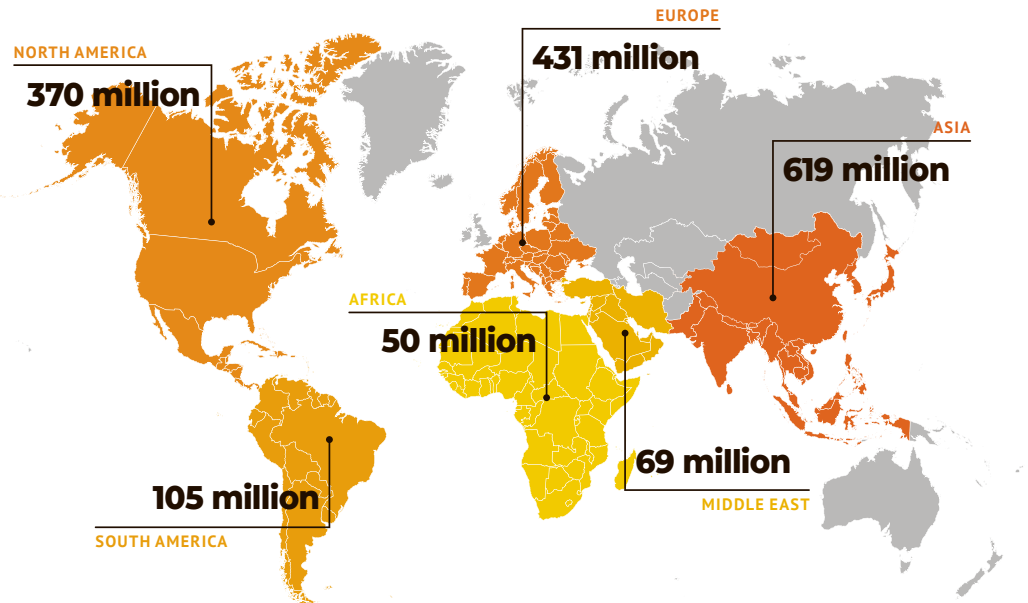


## WORLD VEHICLE PARC

# 1.5

billion vehicles

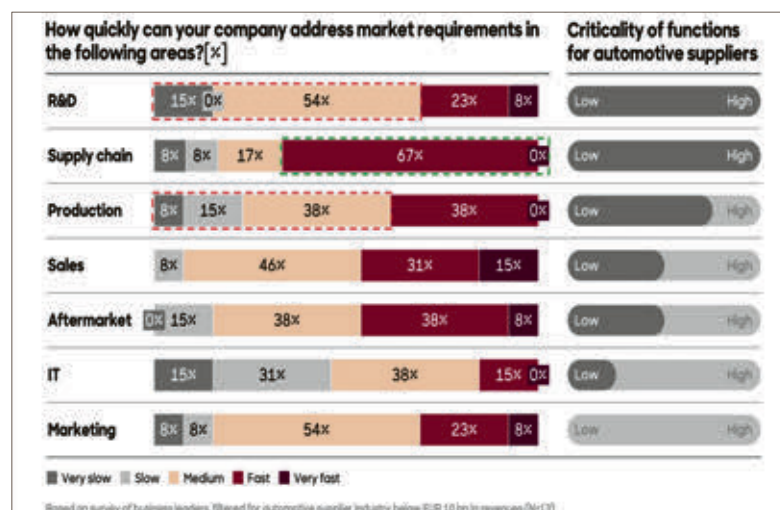
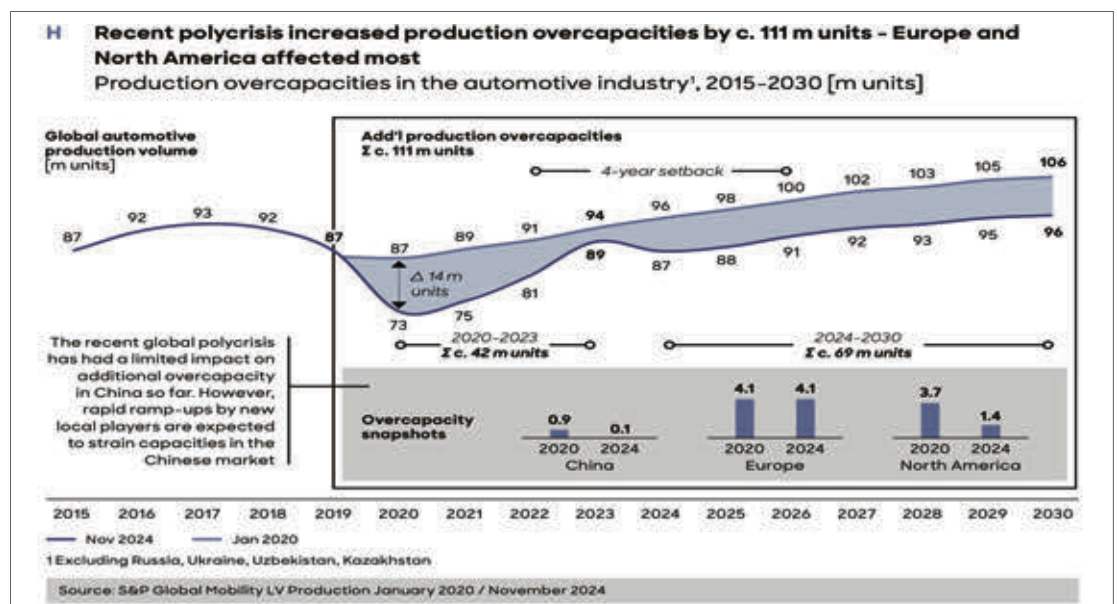
(estimated figures for 2025) +7% compared to 2024



## EQUIPMENT MANUFACTURERS: A SERIES OF CHALLENGES TO OVERCOME

Stagnation in global production volume (source: S&amp;P Global Mobility LV Production January 2020 / November 2024)

While China and the countries of the South will continue to be the drivers of growth, Europe and North America are stagnating. This is due to declining production volumes, exacerbating the overcapacity that began to emerge during the Covid-19 pandemic. This is expected to result in a cumulative surplus of more than 100 million units between 2020 and 2030, impacting the entire value chain. Although China is more in line with previous production forecasts, intensifying competition and the creation of new factories are also leading to overcapacity, particularly for Western equipment manufacturers competing with new Chinese equipment manufacturers that have rapidly increased their capacity.



For key functions (e.g., R&D) or operations, automotive suppliers are far too slow in responding to market changes. However, in the supply chain, reactivity has improved, thanks in particular to developments of previous years.

(source: Roland Berger survey – July 2025)

Automotive equipment manufacturers in Europe and North America are facing challenges with full-time equivalent (FTE) productivity: the workforce is growing while revenues are stagnating. FTE productivity in China is showing the opposite trend, and is therefore increasing.

(source: Roland Berger survey – July 2025)

