DUCKER CARLISLE

The Competitive Reset: Chinese OEMs and the Structural Challenge Facing Europe's Vehicle Industry

Supporting traditional industry leaders in responding to rising Chinese competition while securing long-term growth

May 2026

DUCKER CARLISLE

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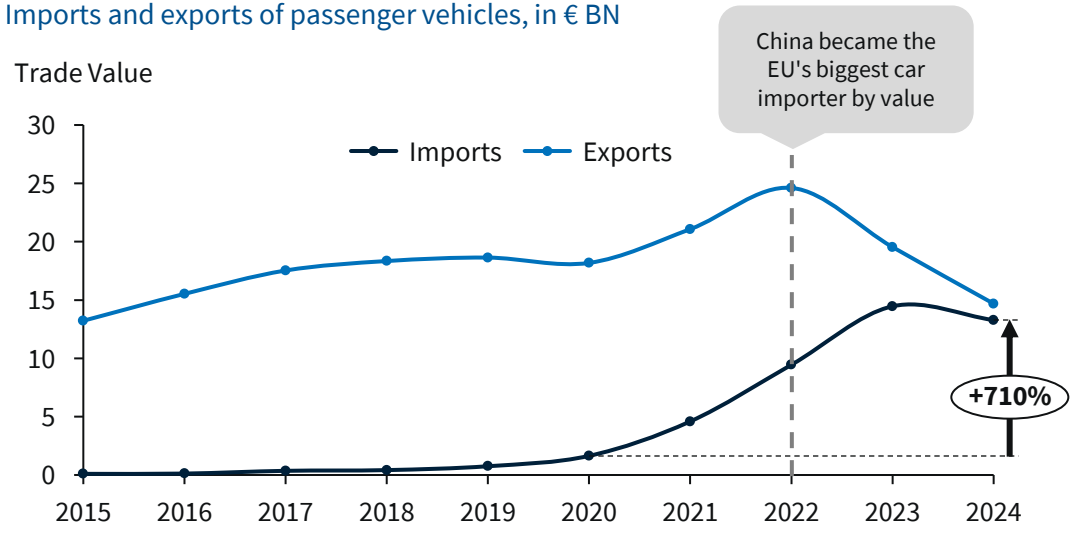
I. Executive Summary

A concise synthesis of the structural shifts reshaping Europe’s vehicle and equipment markets and the strategic imperatives required to respond.

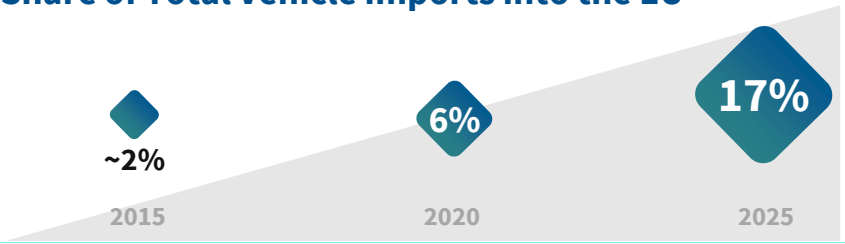
Europe’s competitiveness reset is accelerating as Chinese imports and market share expand at accelerated speed

EU Auto Trade with China[1]

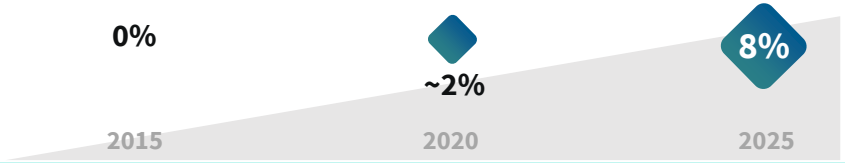
Imports and exports of passenger vehicles, in € BN



China Share of Total Vehicle Imports into the EU[1]



China Share of BEVs Car Sales in Europe[2]



Europe’s export advantage has collapsed:

- In 2020 exports were nearly 6× larger than imports, by 2024 the gap had almost disappeared, signaling a full reversal of trade balance.
- China is now deeply embedded in Europe’s supply mix. Its share of total vehicle imports jumped from ~2% (2015) to 17% (2025), while its footprint in BEVs sold in Europe climbed from 0% to 8% over the same period.
- This is not a temporary spike, it reflects a long-term realignment powered by China’s cost advantage, scale, and accelerating export capability.

(1) Eurostat, Motor vehicles with <10 persons, EU – 27 countries
(2) EU Figures taken from ACEA

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Chinese competitors tackle the markets with a distinct competitive logic

Chinese competitors combine industrial scale, cost efficiency, and rapid innovation to capture share as **willingness-to-pay shifts toward cost-balanced offerings**.

These structural advantages are increasingly shaping competitive outcomes across vehicle segments and the value chain.

Competitive Logic
[Indicative]

Technology Sophistication
Product engineering quality, durability, safety, system integration.

Cost Competitiveness
Manufacturing efficiency, labor productivity, vertical integration.

Scale & Industrial Capacity
Production volume, platform standardization, supplier leverage.

Product Development Speed
Model refresh cycles, development speed, iteration velocity.

Customer Segment Orientation
Degree of focus on high-spec vs cost-driven customer needs.

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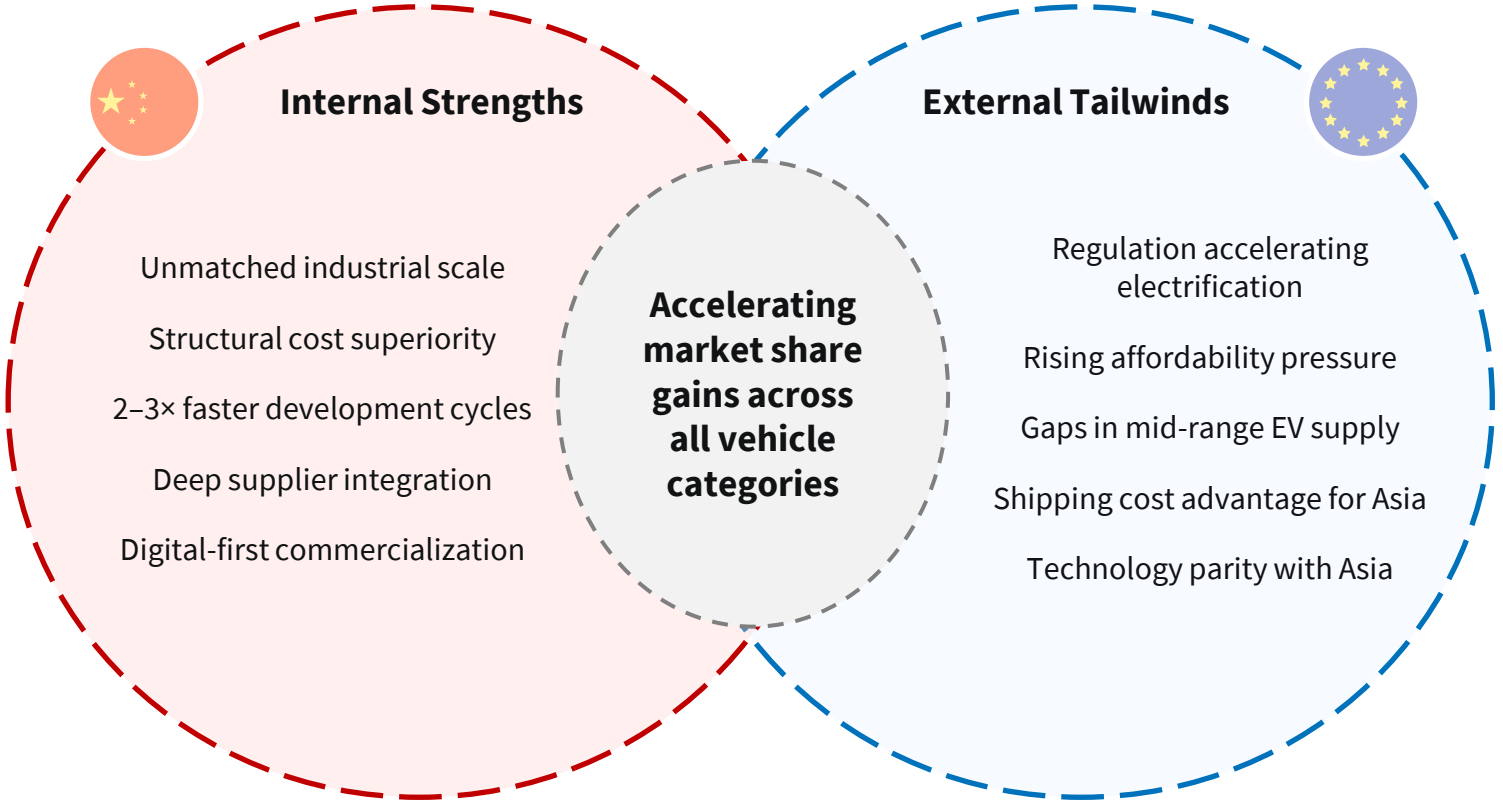
The convergence of Chinese strengths and European tailwinds is accelerating Chinese brands' rise in Europe



Current market combine Chinese manufacturers structural internal advantages with favorable European market conditions.

This convergence unlocks accelerated share gains across all segments.

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The impact on Europe's established players spans pricing pressure, value migration, capability gaps and aftermarket

Without fast and structural action, these pressures will erode Europe's long-term competitiveness.

Price & Margin pressure	• Chinese OEMs are resetting Europe's price, compressing margins as customers shift toward value and price-performance. • Margin pressure is becoming structural, with Tier-1s and OEMs absorbing lower profitability while still funding electrification and software transitions.
Value creation shift	• Value is migrating from mechanical ICE systems to batteries, electronics and software, where Europe is structurally more dependent and less competitive. • Chinese players are localizing high-value activities in Europe (assembly, supply chain, partnerships), capturing an increasing share of the EV value pool.
Knowledge gap	• Europe is falling behind in batteries, software integration and industrialization speed, as China's vertically integrated model accelerates learning cycles. • If the gap widens, Europe risks losing long-term capability leadership, not just short-term market share, weakening its ability to shape future technologies.
Aftermarket	• Aftermarket value is shifting toward diagnostics, software and lifecycle services, areas where European players hold weaker positions. • As Chinese installed base grows, service and data economics increasingly accrue to new entrants, eroding Europe's traditional aftermarket advantage.

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Europe stands at a pivotal moment that demands a robust strategic response to close the widening gap

Ducker Carlisle helps organizations **build robust strategies and turn them into measurable impact** through deep sector expertise, European market insight and hands-on execution support across product, cost, commercial and operational transformation.

DEFEND

Reinforce Europe's core strengths to stabilize the base.

Strategic Focus Areas

- Brand Strength
- Engineering Excellence
- Channel & Customer Access
- Aftermarket Economics
- Footprint & Service Levels

ADAPT

Restore competitiveness by closing the structural gaps.

Strategic Focus Areas

- Electrification Readiness
- Software-Define Vehicle
- Cost Structure Reset
- Platform Simplification
- Supply Chain Modernization

ACCELERATE

Build new growth engines and capture market share.

Strategic Focus Areas

- Strategic Alliances
- Vertical Integration
- Digital Services & Subscriptions
- Lifecycle Monetization
- New Business Models

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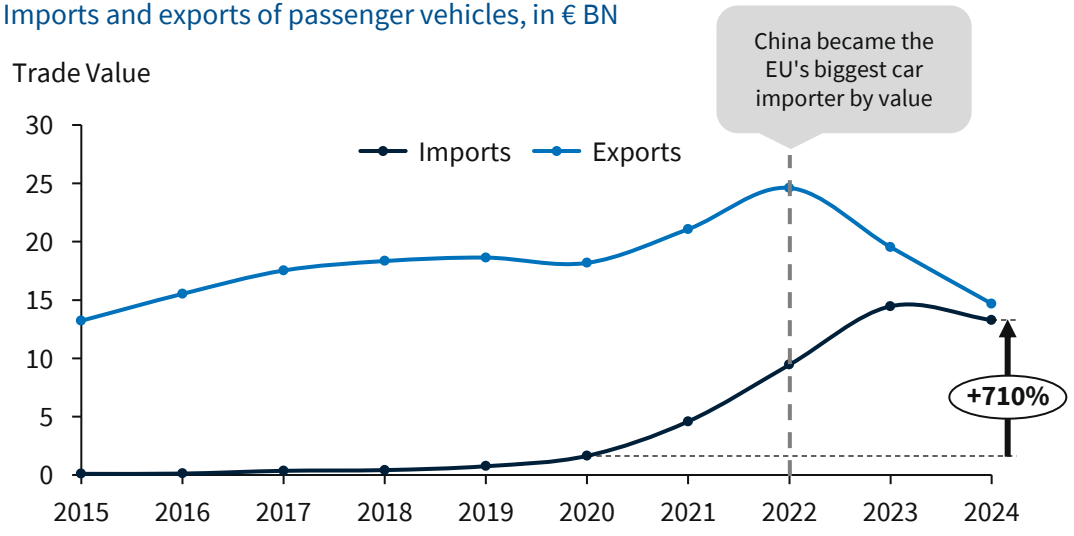
II. A structural shift in Europe’s vehicle industry

Europe’s long-standing competitive position is eroding as cost disadvantages, slower electrification and rising import dependence reshape the industry’s fundamentals.

Chinese vehicle imports into Europe and market share have been expanding at an accelerated speed since 2020

EU Auto Trade with China[1]

Imports and exports of passenger vehicles, in € BN



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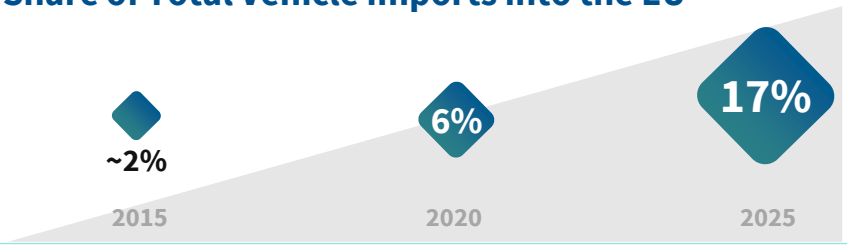

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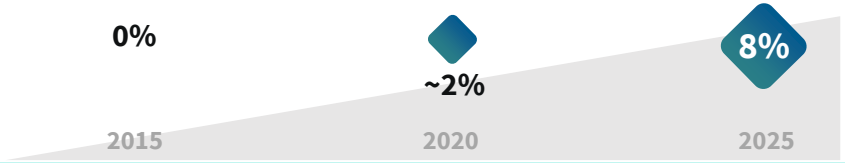

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(1) Eurostat, Motor vehicles with <10 persons, EU – 27 countries
(2) EU Figures taken from ACEA

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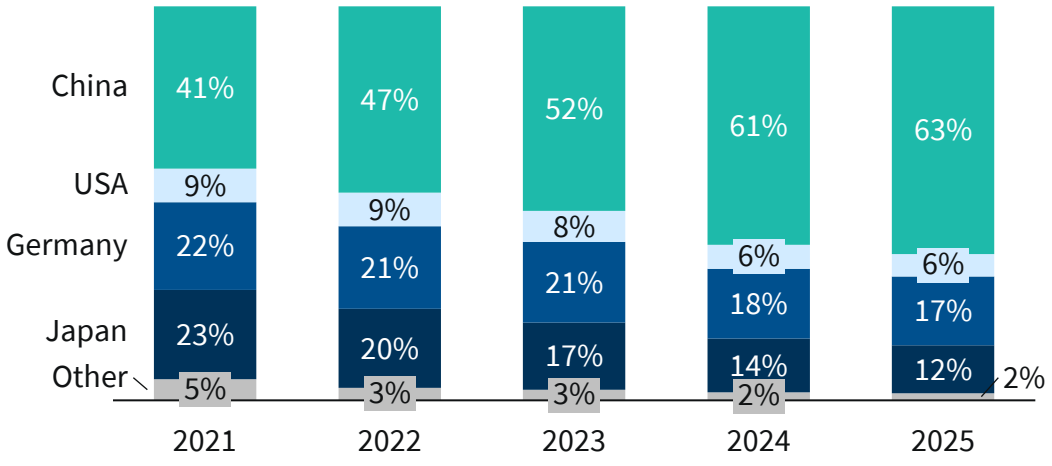
On the opposite side, European OEMs are steadily losing market share in China, facing intense domestic competition

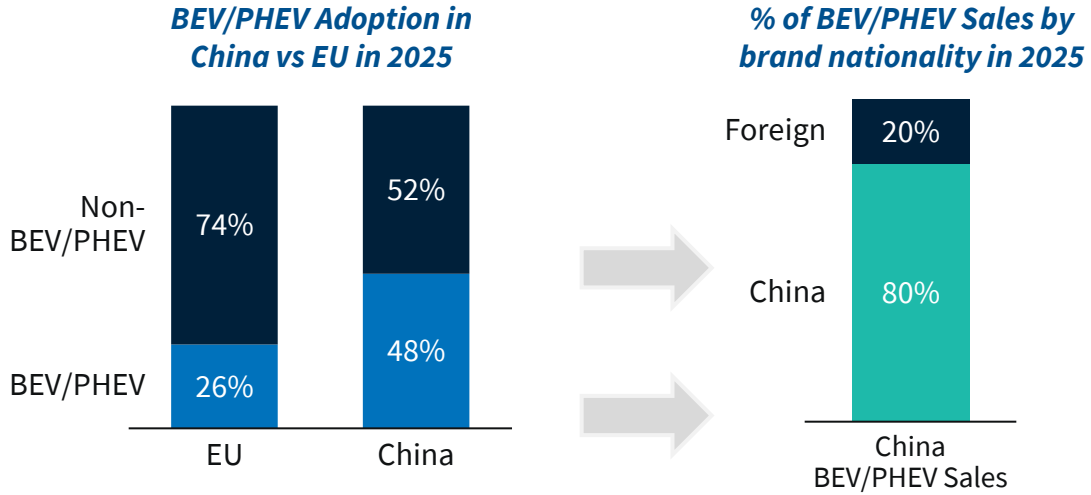
While this data focuses on passenger cars, this segment typically acts as a leading indicator for other vehicles segments.

Vehicle Sales by Brand Nationality in Europe[1]

2025 figures are for Q1



BEV/PHEV Adoption and Chinese OEM Advantage[2]



China's rapid EV adoption and scale-driven cost advantages are enabling its OEMs to outpace European manufacturers domestically:

- Chinese OEMs dominate at home, rising from 41% to 63% market share since 2021 and displacing European and Asian brands .
- China leads the EV transition (48% penetration and 80% domestic share), creating a structural technology and cost gap
- Europe is losing competitiveness, as slower EV adoption and higher production costs coincide with a surge of competitively priced Chinese imports into the region

(1) Data taken from China Passenger Car Association
(2) EU Figures taken from ACEA | China Figures taken from IEA, Global EV Vehicle Outlook

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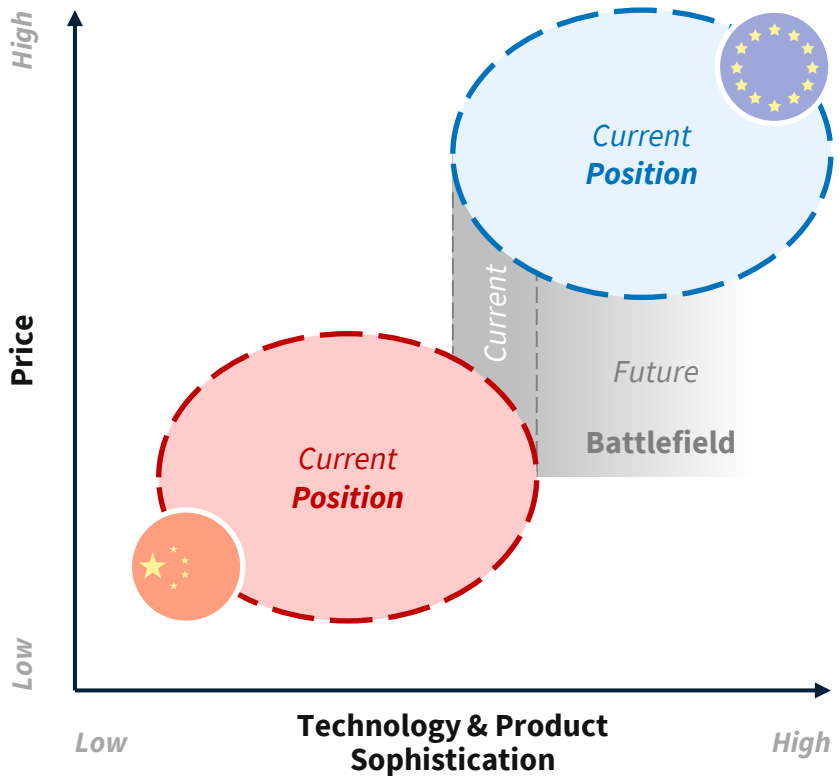
Across sectors, European players hold comparable positions, which are increasingly challenged by Chinese competitors

Strategic Positioning
[Illustrative]



Company Overview
[Example of market players]

OEMs

Passenger Cars	RENAULT, Mercedes-Benz, BMW, Volkswagen, STELLANTIS	BYD, GWM, CHERY, GEELY, SAIC
Trucks	IVECO, VOLVO, DAF, DAIMLER, TRATON	SHACMAN, DONGFENG, FOTON, SINOTRUK
Construction & Material Handling	LIEBHERR, KION GROUP, JCB, CNH, VOLVO, MANITOU, MECALAC FAYAT GROUP	HANCHA, XCMG, SHANTUI, LiuGong, SANY, ZOOMLION
Tier 1 Suppliers	BOSCH, FORVIA Inspiring mobility, ZF, Valeo, Continental	Yanfeng, JOYSON ELECTRONICS, Fuyao Group, CATL, Minth Group
Value Proposition	*"High-spec engineering, durability, safety, and lifecycle value for demanding applications"*	*"Competitive, reliable vehicles at scale, with strong cost efficiency and fast innovation"*

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Chinese competitors tackle the markets with a distinct competitive logic

Chinese competitors combine industrial scale, cost efficiency, and rapid innovation to capture share as **willingness-to-pay shifts toward cost-balanced offerings**.

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Customer Segment Orientation
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Why is the structural shift accelerating now?

Cost gap widened post-2020

"Europe continues to face a structural cost disadvantage relative to Asia, driven by persistently higher energy prices and regulatory burdens."

International Monetary Fund, 2024

Scale & vertical integration driving cost and speed leadership

"China's manufacturing ecosystem benefits from deep vertical integration and unparalleled scale, supporting lower production costs and rapid expansion."

OECD, 2024

'Good-enough' quality removed the last adoption barrier

"Chinese automakers have closed much of the quality gap with established global brands, accelerating their expansion in overseas markets."

Financial Times, 2024

Willingness-to-pay shifted toward value

"European consumers are increasingly prioritizing value and price-performance as inflation and stagnant real wages reshape purchasing behavior."

Eurostat, 2024

China's export push structurally redirecting supply to Europe

"China's industrial overcapacity is increasingly being absorbed through exports, with Europe emerging as a key destination across multiple sectors."

Economist Intelligence Unit, 2025

The market is undergoing a **structural rebalancing.**

Europe should act now to prevent the gap from widening further.

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III. The rise of Chinese brands in Europe

Chinese OEMs are scaling rapidly in Europe, leveraging cost leadership and vertical integration to capture share across segments.

External Drivers: European affordability pressures create a structural opening for lower-cost options

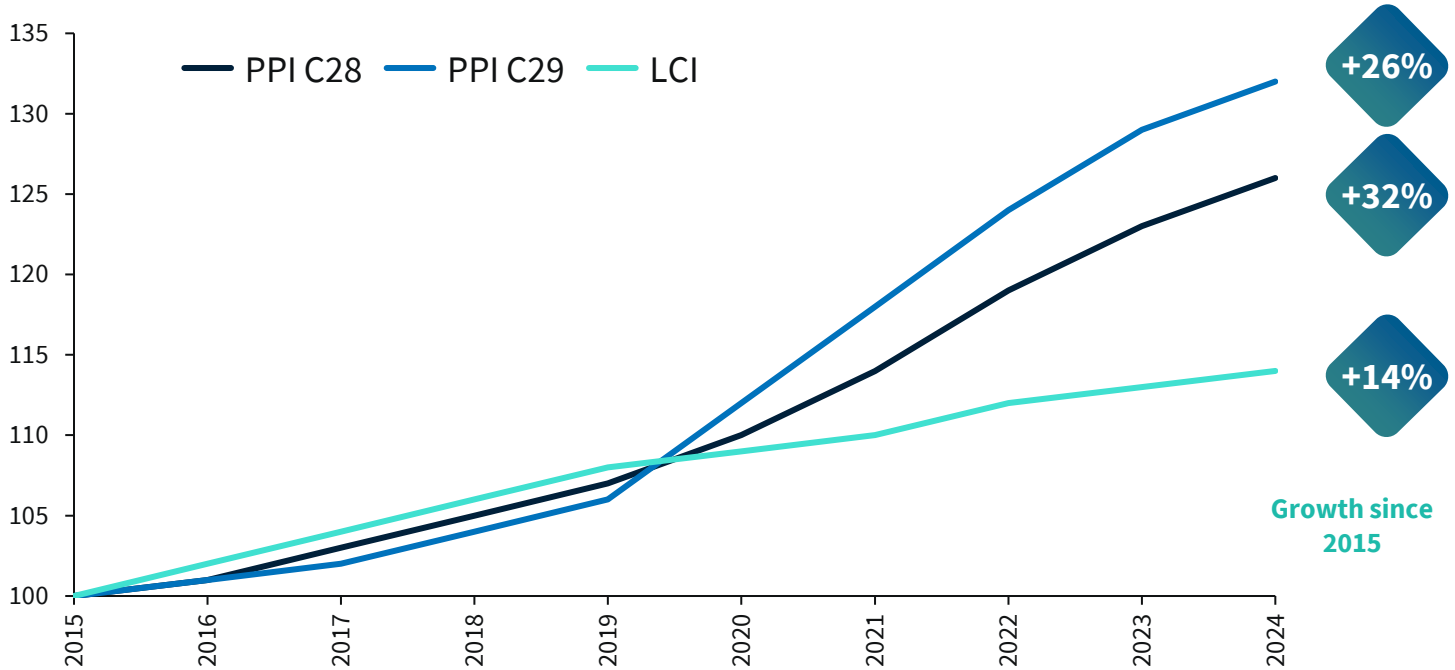
Industrial prices for vehicles and machinery have structurally outpaced labor cost growth, eroding affordability and shifting demand toward cost-driven decisions.

- Over the past decade, price inflation in C28 and C29 has significantly exceeded wage growth, compressing budgets and constraining customers' ability to absorb higher equipment costs — increasing focus on total cost of ownership.
- This imbalance reinforces the competitiveness of lower-cost entrants, as price sensitivity rises and willingness to pay for legacy brand premiums declines.

"Chinese construction equipment imports into France grew from €200M to €260M in one year, even as total imports fell by 15%, lifting China's share to 9.6%"
(Evolis France at Les Echos ,2026)

European Prices & Wages Dynamics[1]

Index base year = 100 (2015)
PPI C28 - Machinery & Equipment (Construction, material-handling, agricultural, industrial, and mechanical Tier-1 systems)
PPI C29 - Motor Vehicles, Trailers & Semi-trailers (Passenger cars, vans, trucks, buses, trailers, and integrated Tier-1 components)
LCI - Labor Cost Index (Total labor costs across Europe, covering wages and employer social contributions across all sectors)



(1) Data taken from Eurostat (PPI C28, PPI C29, LCI), 2015–2024.

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External Drivers: Uneven electrification, regulatory shifts, and rising commoditization reshape Europe's landscape

Europe's ecosystem faces structural pressures — electrification gaps, tightening regulations, and rising commoditization - creating asymmetric vulnerabilities and openings for cost-competitive entrants by segment.

- Electrification gaps are widest in trucks & buses, and construction & material handling segments, where cost curves and technology maturity lag global peers.
- Regulatory pressure is strongest in passenger cars and Tier-1 suppliers, driven by CO_2 targets, trade measures, and localization rules.
- Commoditization accelerates in construction & material handling segment, and Tier-1, where "good-enough" solutions erode differentiation.

Segment Exposure to External Drivers	Passenger Cars	Trucks & Buses	Construction & Material Handling	Tier-1 Suppliers
Electrification gap Includes tech readiness & cost curve	**Medium** EV shift advanced but cost gap vs global peers persists	**High** Battery weight, range & infra constraints slow adoption	**High** Heavy-duty cycles make electrification costly & immature	**High** Platform transitions pressure cost, tooling & margins
Regulatory pressure Includes CO_2, trade & localization	**High** Direct exposure to CO_2 targets & stricter import checks	**Medium** Standards tightening but slower than Passenger Cars	**Medium** Public procurement & emissions rules rising	**High** Regulations reshape sourcing, content, and cost structure
Commoditization Includes "good-enough" adoption	**High** Lower cost EVs erode brand differentiation	**Medium** Fleet buyers balance upfront cost with uptime and residual value	**High** Mid-tier entrants scaling fast in core segments	**High** Price pressure across systems & components

"BYD is tackling this (electrification gap) through a combination of battery storage, solar integration and ultra-fast charging" ***EuroNews 2026***

"Volvo CE begins 'world-first' production of electric articulated haulers" ***Bauma Munich 2025***

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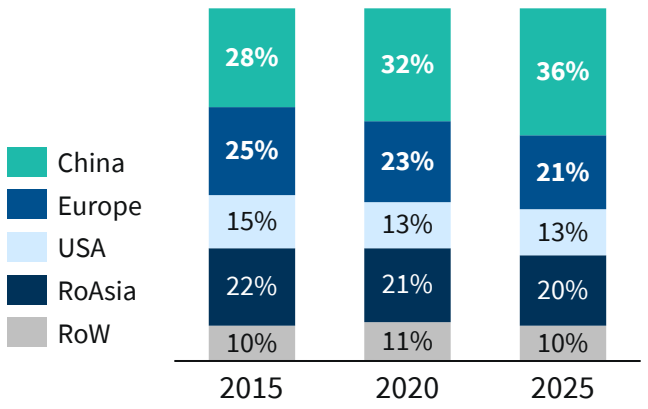
Internal Drivers: Structural cost and speed advantages position Chinese OEMs ahead, driven by scale and integration

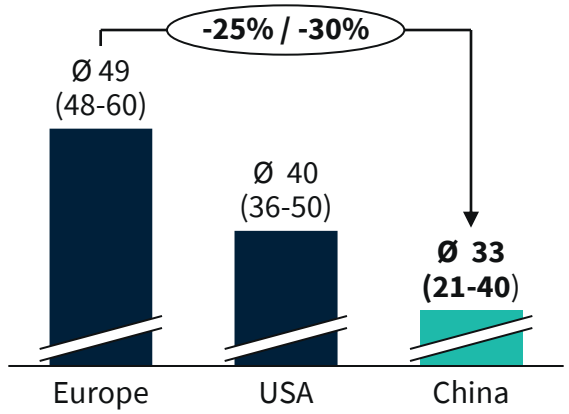
Global Production Capacity Share[1]

All vehicle & machinery categories combined



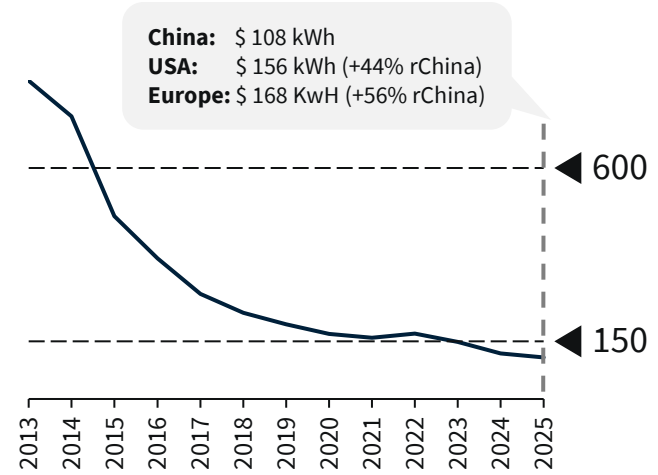
Time to Market[2]

Product Development Time in Months



Battery Pack Prices Fall[3]

Lithium-ion battery pack prices USD per kWh



China's OEMs benefit from structural advantages in scale, speed, and cost that are reshaping global competition.

- Production capacity has scaled to ~37% of global share (vs. 28% in 2015), surpassing Europe and the US combined.
- Development cycles average ~33 months, 25–30% faster than Western OEMs across all segments.
- Cost base is structurally ~20% lower, driven by platform reuse, local sourcing, and vertical integration.
- These advantages apply system-wide, enabling faster iteration and sustained pricing pressure across segments.

(1) Data taken from OICA, MIIT, and OECD
(2) Data taken from Capital IQ and Ducker Carlisle Research
(3) Data taken from BloombergNEF

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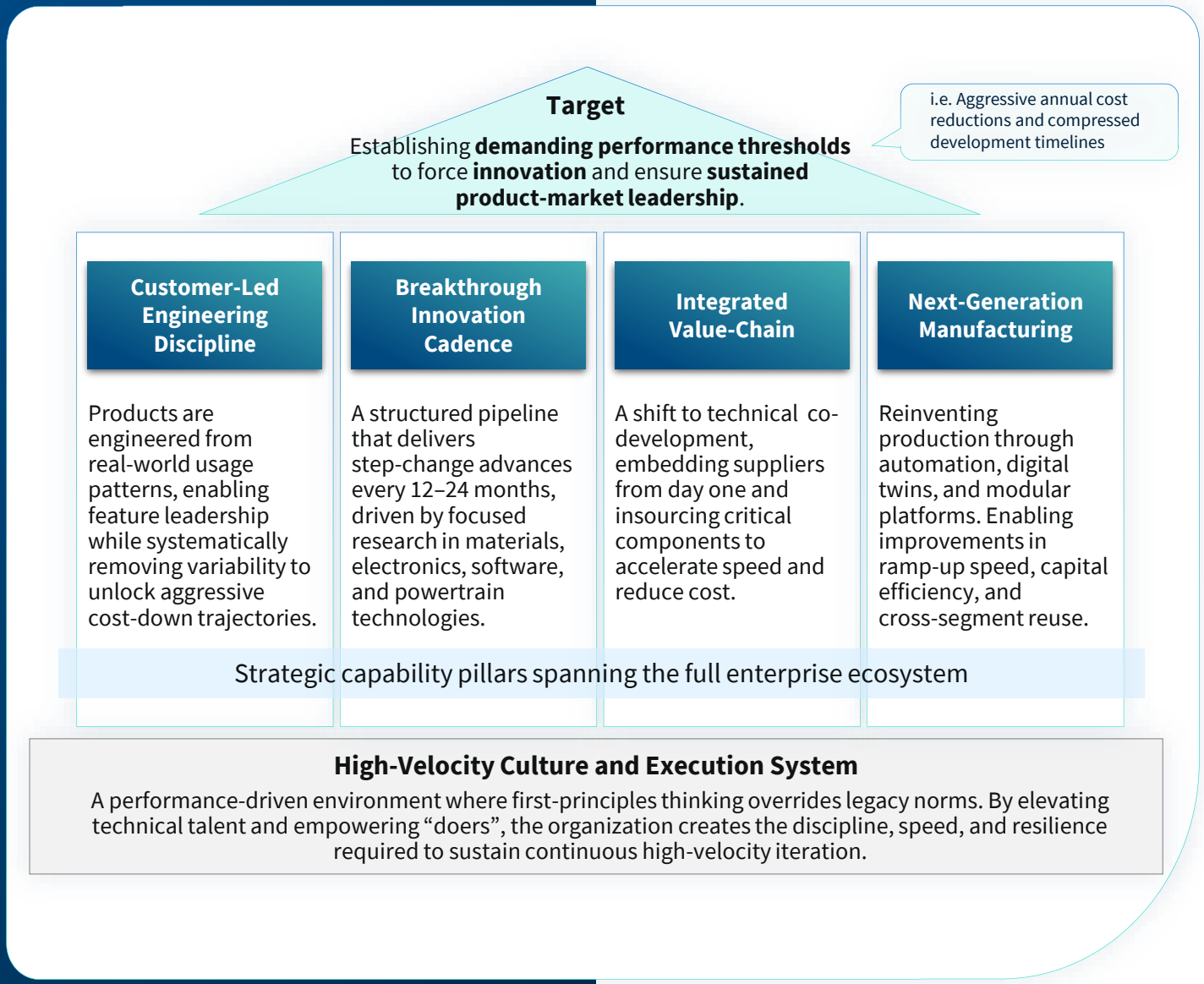
China’s high-velocity product engine is driven by a robust innovation and execution strategy



Internal Drivers: Chinese OEMs deploy a more agile, digitally enabled, and incentive-driven commercial model

Chinese OEMs operate a high-velocity commercial system that blends digital enablement, direct engagement, and superior dealer economics, enabling faster market penetration and tighter control of the customer lifecycle than traditional European models.

Service Model Comparison in Europe	Europe	China
Sales Architecture How the OEM structures the commercial interface.	• Predominantly dealer-centric • Pricing fragmentation and slower decision cycles • Limited control of customer data	• >60% direct or hybrid-direct models • Centralized pricing & unified customer journey • Faster feedback loops and data capture
Dealer & Partner Economics Attractiveness of commercial terms.	• Standardized margins with limited variability • Fixed payment terms, some flexibility for fleets • Dealers carry most inventory and market risk • Volume rebates exist but are modest/predictable • No consignment stock (working-capital is needed)	• Share-capture incentives in first 24–36 months • Flexible payment terms for fleets with Risk-sharing programs (longer payment, early rebates, bonuses) • Inventory financing flexibility, including lower-rate financing and some consignment stock
Digital Enablement (OTA, Telematics) Degree of software-driven services.	• Lower average OTA penetration • Slower rollout due to legacy platforms and fragmented architectures.	• Higher OTA penetration and strong telematics, with even higher levels for some EV OEMs • Real-time diagnostics & continuous improvement.
Customer Journey & Digital GTM Integration and digitalization of the end-to-end experience.	• Segment-dependent digital journey • Fragmentation persists in most categories, limiting data continuity and learning speed	• OEM-led digital journey is strong in BEV/PHEV Passenger cars, expanding into other segments • Integrated CRM + telematics for faster learning
Aftersales & Service Model How lifecycle support is delivered.	• Physical-service dependent • Slower issue resolution and higher cost base	• OTA-driven service • Fewer workshop visits with remote diagnostics

"XCMG's EU products integrates telematics for fleet monitoring, predictive maintenance and remote diagnostic"

"NIO started distribution in 5 new EU countries with a direct-to-consumer GTM"

"Sany to invest USD 4.3B to become an AI-native robotics company"

(OEM websites, 2026)

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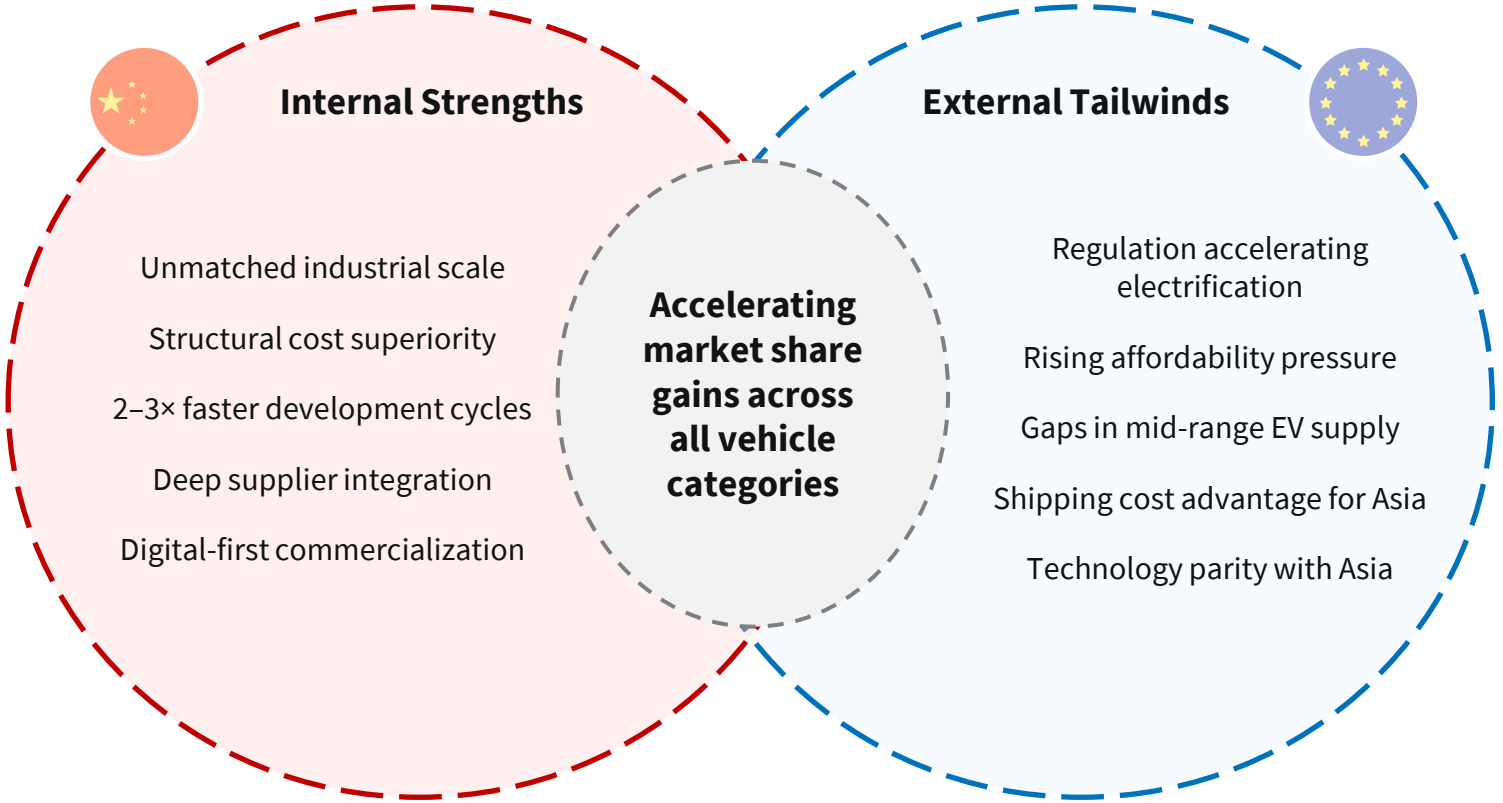
The rise of Chinese brands in Europe reflects the convergence of internal strengths and external tailwinds



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IV. Impact on Europe’s established players

European players face mounting pressure on margins, technology speed, supply chains and brand differentiation as competitive dynamics shift across the value chain.

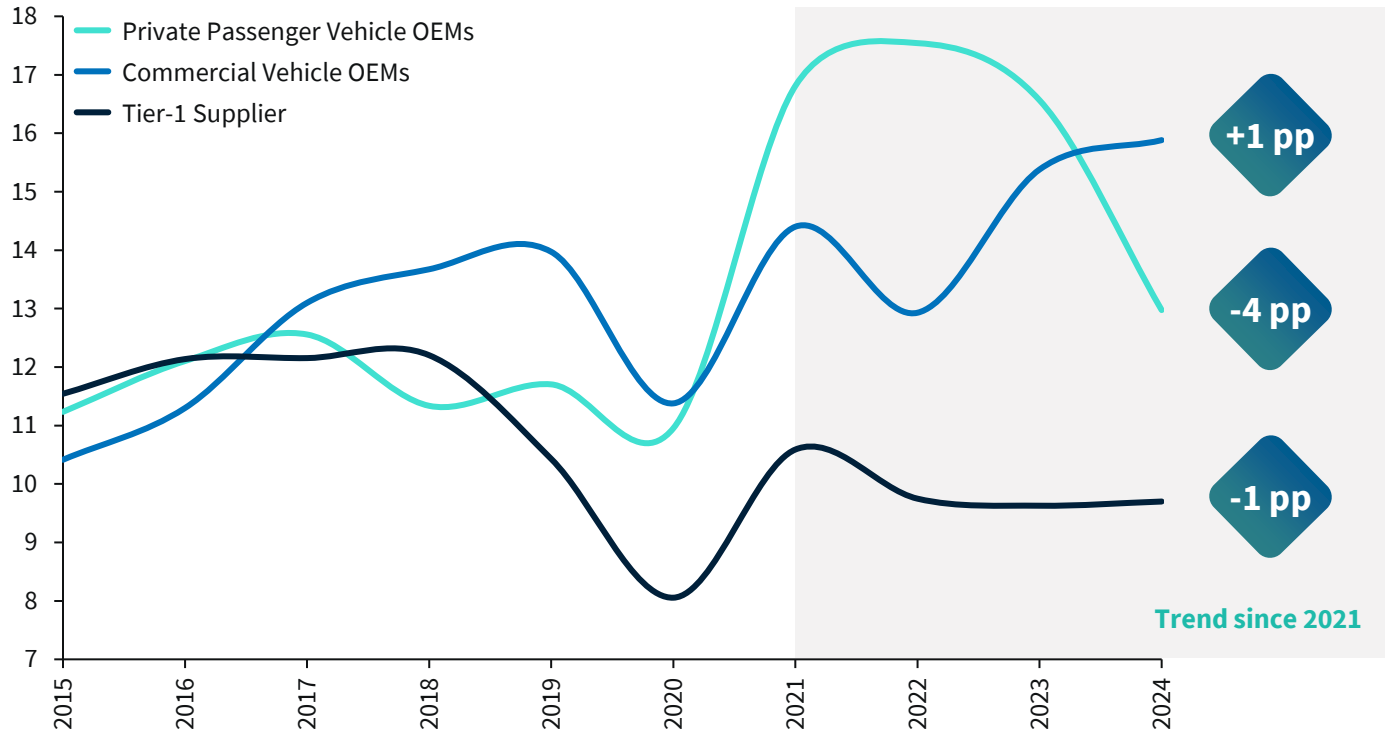
Price & margin pressure: Structural competition erodes long-term pricing power for European players

European players are entering a structurally tougher earnings cycle. Margin pressure is now driven less by demand softness and more by intensified global competition:

- Chinese and broader Asian OEMs and suppliers are increasingly aligned with customer willingness-to-pay, combining competitive pricing with strong and credible EV offerings.
- This dynamic weakens Europe's traditional "price/mix over volume" model and shifts pricing power away.
- Tier-1 suppliers face additional strain from lower OEM profitability, reduced visibility on future programs, and rising import competition, at the same time as the industry still needs to fund electrification and software transformation.

Margin development of major European players[1]

EBITDA-margin in %, 2015-2024



(1) Sample of ~15 major European players with available financial information (Source: Orbis). Commercial Vehicle includes i.e., Construction, Logistic, Transport, Agriculture

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Value creation shift: As automotive transforms, value creation shifts while Chinese players continue to expand into Europe

Localization efforts of Chinese competition

Selective examples with location opening date

The competitive challenge is not just about who sells the vehicle, but about who captures the most valuable parts of it.

- As value shifts from ICE to EV architectures, batteries, electronics, software and upstream materials now represent a much larger share of total value.
- Europe remains structurally more dependent on external supply chains in these areas than in the ICE era, creating cost and speed disadvantages.
- Chinese players are localizing assembly, partnerships, and commercial footprints across Europe, reallocating value creation within Europe toward non-European players.

"LiuGong is set to open new regional hubs in Italy, France and Germany which will enhance its customer support, dealer development and product management in key markets" ***(LiuGong, 2025)***

"CATL's €7.3bn factory investment in Hungary has been recognized as the most impactful operational mega FDI project in Europe for its wide-ranging impacts " ***(FDI Intelligence 2026)***

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Knowledge gap: European players are risking losing to competition in terms of core capabilities and speed

Europe's challenge is not labor cost, but a widening capability gap in batteries, industrialization speed, software integration, and fast product cycles.

- China's higher vertical integration accelerates learning cycles, enabling faster iteration, deeper know-how, and structurally lower costs.
- If these gaps continue growing, European companies risk losing not only short-term market share but also long-term learning effects.
- The strategic question is whether Europe can still shape the technologies and economics that matter most in electrification.

Top 10 leading battery cells producers

1	CATL	6	CALB
2	BYD	7	EVE Energy
3	LG Energy Solution	8	Gotion
4	Panasonic ENERGY	9	SAMSUNG SDI
5	SK	10	SVOLT

Vertical Integration In-house control of key components and processes

High Integration	Medium Integration	Low Integration
• Battery cells • Battery packs • Electric motors • Power Electronics • EV Platforms • Manufacturing & Industrialization	• Inverters • Domain Controllers • Software Stack	• Chips

High Integration	Medium Integration	Low Integration
• Electric motors • Power Electronics	• Inverters • Domain Controllers • Software Stack • Manufacturing & Industrialization	• Battery cells • Battery packs • Chips • EV Platforms

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Reputation: The long-established pioneer and leadership position, along with the related market perception, is at risk

Europe's traditional moat — brand and reputation — is becoming less protective than it used to be.

- In the EV market, customers prioritize tangible proof points over legacy: price, range, digital experience, safety, warranty, and total cost of ownership.
- Chinese entrants have understood this shift and are building trust through performance rather than heritage, shifting brand competition from emotional status to measurable customer value.
- As a result, brand competition is moving from emotional status and engineering reputation toward measurable customer value.
- If European manufacturers do not translate brand into clear product and ownership advantages, they risk faster brand erosion than expected in the most dynamic segments.

Differentiation situation of European players

Indication

Criteria	Situation Defensible — Neutralized	Chinese challenger signal
Premium image & status		Tech-led premium challenges legacy prestige
Engineering & driving excellence		Good-enough performance closes functional gap
Safety & quality trust		Safety ratings and warranties reduce trust gap
EV credibility		EV-first brands feel more authentic
Digital & software user experience		Screens, apps, OTA and voice assistants
Value for money		Comparable equipment and functionality for less money
Ownership cost & residual value		Battery warranties support TCO confidence
Dealer, service & fleet trust		Dealer and parts networks expand quickly

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Aftermarket: Shifting economics challenge the traditional European model

Aftermarket outlook and presence of competitive parties

Indication

Category	Trend	European strength	Chinese strength
Legacy mechanical aftermarket	↘	Established strength and market position	Limited relevance and presence of OEMs
Wear & repair aftermarket	→	Established strength and market position	Emerging market position
EV technical aftermarket	↗	Room for improvement and catching up	First-mover advantage and leading position
Data/ software/ lifecycle services	↗	Increasing efforts with mixed presence	Strongly emerging market presence

Aftermarket value is shifting toward areas where European players hold weaker positions and new entrants are gaining ground.

- EVs reduce traditional maintenance and shrink several high-margin service categories, shifting value toward diagnostics, software, battery work, and uptime-based services.
- As Chinese vehicles and equipment build installed base in Europe, a growing share of future service, parts, and customer-data economics may accrue to the entrants themselves.
- The core risk is not only lower service intensity per vehicle but losing control of the future service relationship as value migrates to digital and lifecycle services.

"A strong dealer network is essential, because service is critical in construction, you simply cannot afford a jobsite to stop due to a machine breakdown" ***(C-MAT France at Les Echos, 2026)***

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V. Strategic response

Europe must defend its core strengths, close structural gaps and accelerate new growth engines through disciplined strategy and execution.

Europe stands at a pivotal moment that demands a robust strategic response to close the widening gap

The accelerating strengths of new challengers are reshaping competitiveness across all segments. Europe must act now with speed and discipline to protect what still differentiates it, address structural gaps and build new engines of growth.

DEFEND

Reinforce Europe's core strengths to stabilize the base.

ADAPT

Restore competitiveness by closing the structural gaps.

ACCELERATE

Build new growth engines and capture market share.

Ducker Carlisle helps organizations **build robust strategies and turn them into measurable impact** through deep sector expertise, European market insight and hands-on execution support across product, cost, commercial and operational transformation.

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Defending Europe's core strengths is essential to preserve the advantages that new entrants cannot easily replicate

1 Brand Strength

Reinforce trust and sharpen Europe's value proposition.

- Brand equity & attribute diagnostics
- Quality & safety improvement roadmap
- Proof points for long-term value

2 Engineering Excellence

Protect leadership in critical attributes while accelerating development.

- Attribute leadership benchmarking
- Digital validation acceleration
- Modular platform acceleration pathways

3 Channel & Customer Access

Protect customer access by elevating dealer and digital engagement.

- Dealer excellence programs
- End-to-end digital sales & service journey optimization
- Data-driven personalization

4 Aftermarket Economics

Safeguard lifecycle profitability (retention and recurring revenue).

- Service model redesign
- Predictive maintenance & connected services
- Customer lifetime value-driven pricing & warranty strategies

5 Footprint & Service Levels

Strengthen cost competitiveness and service performance.

- Supply chain resilience initiatives
- Distribution Network optimization
- Productivity & automation programs

Ducker Carlisle Success Cases

Brand equity assessment for Tier 1 supplier

Digital customer journey assessment in heavy equipment sector

Competitive go-to-market and benchmark analysis in construction equipment

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Adapting and closing Europe's critical gaps will enable restore competitiveness and fund the future

1 Electrification Readiness

Accelerate product, cost and readiness EV competitiveness.

- EV portfolio and cost-to-value optimization
- Battery, sourcing and readiness roadmap
- Charging ecosystem & TCO competitiveness levers

2 Software-Define Vehicle (SDV)

Build software, data and electronics capabilities to match competitor speed.

- SDV architecture and feature roadmap
- Over-the-air, connectivity & data monetization enablers

3 Cost Structure Reset

Address structural cost gaps to restore competitiveness.

- Zero-based cost and value engineering programs
- Indirect cost and efficiency levers
- Supplier collaboration and cost-down initiatives

4 Platform Simplification

Reduce complexity to unlock speed, scale and cost advantages.

- Platform consolidation, standardization and modularization pathways
- Variant and option reduction programs

5 Supply Chain Modernization

Upgrade operations to support EV, SDV and cost-competitive models.

- Manufacturing and automation roadmap
- Supply chain digitalization and EV/SDV readiness initiatives
- Service level improvement

Ducker Carlisle Success Cases

Alternative energies penetration scenarios for Material handling OEM

Multidisciplinary Aftermarket Growth Playbook for a Tier-1 Supplier

Warehouses Automation Strategy for Automotive OEM

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Accelerating new growth pools to rebuild competitiveness and unlock future value

1 Strategic Alliances

Build partnerships that accelerate capabilities, scale and market access.

- Alliances for EV, SDV and technologies
- Joint ventures for cost-competitiveness
- Ecosystem partnerships for charging, energy and mobility

2 Vertical Integration

Integrate technologies & components to secure cost, quality and supply.

- Battery, power electronics and software integration
- Make-vs-partner strategies for core technologies
- Capability building in high-value modules

3 Digital Services & Subscriptions

Create new revenue pools through subscription-based services.

- Feature-on-demand and premium service
- Connected services and data-driven offerings
- Monetization models for connected and premium services

4 Lifecycle Monetization

Expand value capture across the full ownership journey.

- Used-car, refurbishment & certified pre-owned programs
- Battery lifecycle & second-life value
- Retention and loyalty roadmaps

5 New Business Models

Enter adjacent areas enabled by electrification and digitalization.

- Energy services, smart charging and V2G
- Mobility-as-a-service and fleet solutions
- New revenue pools in circularity and sustainability

Ducker Carlisle Success Cases

Market prioritization strategy and growth road map for Tier 1 supplier

New connected solution/concept testing in transportation sector

Aluminum growth trends in automotive sector

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Europe’s competitiveness will be rebuilt through strategic focus, structural adaptation and disciplined execution

Europe must make disciplined choices and scale new value pools at speed, as the window to rebuild competitiveness is narrowing faster than expected.

Ducker Carlisle delivers the strategic clarity and execution support required for Europe’s next decade.

Strategy × Execution = Competitive Advantage

RESILIENCE CORE
Brand Strength, Engineering Excellence, Aftermarket Economics

COMPETITIVE FOUNDATIONS
Electrification Readiness, Cost Structures, Supply Chain Modernization

NEW VALUE ENGINES
Strategic Alliances, Lifecycle Monetization, New Business models

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VI. About Ducker Carlisle

Appendix

DUCKER CARLISLE

GLOBAL CONSULTING, STRATEGY AND M&A SERVICES

Ducker Carlisle is a global market research, strategy consulting and M&A advisory firm that helps the world's largest companies and private equity firms optimize business performance and accelerate growth. Founded in 1961 with offices across the US, Germany, France, UK, India and China, the firm leverages proprietary data, deep industry knowledge and proven methodologies to deliver tailored, industry-specific insights and recommendations across the automotive, heavy truck & equipment, general industrial, building and construction, and private equity sectors.

60+
Years Of Experience

350+
Annual Projects

10,000
Proprietary Data Points

225+
Team Members

ORGANIC GROWTH

Harnessing customer research, market intelligence, and industry analytics to drive compelling growth strategies and secure a competitive advantage.

BUSINESS IMPROVEMENT

Strategic frameworks and solutions that transform business performance, enhance revenues, optimize supply chains and improve margins.

INORGANIC GROWTH

Accelerating inorganic growth opportunities and de-risking investments through M&A transaction due diligence and post-close portfolio support.

Deep End-Market Expertise

At Ducker Carlisle, we're committed to tackling the challenges of global industry and mapping success for client growth. Decades of knowledge coupled with tenured teams and expert programs result in tailored strategies and proven analytical capabilities to help our clients achieve better business outcomes across technically oriented, global markets.

Motor Vehicles

Automotive

Heavy Equipment

Building & Construction

Materials

Industrial

Private Equity

Motor Vehicle Team

Driving the industry forward.

Our international Motor Vehicle Team combines deep industry expertise with strategic and operational excellence. We support global automotive and transportation companies get products to market faster, increase content by platform and build strong Tier-OEM relationships.

Building on a proven track record in custom research, consulting and M&A transaction support, our team combines analytical precision, entrepreneurial mindset and hands-on collaboration to help our clients improve customer experience, disrupt the market and outperform the competition.

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A Valued Partner

Ducker Carlisle builds long-term relationships with our clients and members of industry. We serve Corporate Executives, Business Owners and Private Equity Investment Professionals, Industry Associations and Government Groups across multiple sectors and regions of the world.

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