



Euromonitor
International

World Market for Automotive

July 2025

Table of Contents

INTRODUCTION

Our expert's view of the Automotive industry in 2025

Scope: Passport Automotive and Mobility System

Scope: Passport Industrial System (relevant to automotive)

Automotive industry snapshot

Five key findings

SUVs, EVs and autonomy shaping future of the global automotive market

Top five trends in Automotive and Mobility

Top five trends uncovered in Automotive and Mobility

GLOBAL MARKET LANDSCAPE

Global vehicle sales face uneven recovery amid tariff tension risks

Interest rates and consumer behaviour shape global auto financing patterns

GLOBAL OVERVIEW

Global autonomous vehicle trends: Level 2 leads, level 3 emerges, level 0 fades

Consumer spending on transport shifts with EV growth and regional infrastructure

US and China to drive global auto growth, led by electrification trends

South Korea leads in EV charging density; US, Germany, Japan lag behind

CATEGORY TRENDS

SUVs dominate, outpacing growth from large and executive cars

SUVs and crossovers: Asia and Americas favour large, Western Europe prefers compact

Large cars: Struggle globally with SUVs but urban demand sustains growth

Executive cars: Asia Pacific slows while Western Europe accelerates with EV sales

MARKET COMPETITION

Toyota and Volkswagen face global sales pressure amid trade tensions and EV rise

BYD's global EV surge: Innovation, affordability, and B2B partnerships

BYD tops global EV sales, closing in on Tesla's BEV lead

Toyota dominates global HEV sales, while Volkswagen adapts in shrinking ICE market

REGIONAL PERSPECTIVES

Asia Pacific driving global market shift towards EVs, led by passenger cars

Asia Pacific: Global growth engine for automotives and EVs

North America: Gradual recovery amid policy and price pressures

Western Europe: EV-ready but slowed by economic headwinds and subsidy decline

PRODUCTION LANDSCAPE

Asia Pacific dominates global production, pressured by low margins

US tariffs and China expansion reshaping global auto manufacturing landscape

Top automakers drive production value growth despite shrinking volume sales

RECOMMENDATIONS

Navigating the disruption in technologies and trade tensions: SWOT for automotives

Key takeaway

APPENDIX: CHARTS

Four key export markets' largest 10 destinations

Regional comparison of petrol price and diesel price

Average age of vehicles in use

APPENDIX: DEFINITIONS

Definition: Light vehicles, passenger cars, light commercial vehicles (1)

Definition: Light vehicles, passenger cars, light commercial vehicles (2)

Definition: Powertrain

Definition: Main passenger car sales categories (1)

Definition: Main passenger car sales categories (2)

Definition: SUVs and crossovers

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/world-market-for-automotive/report.