

Automotive EV/ADAS – Monthly Competitive Intelligence Report



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1. Executive Summary

August-to-September 2025 was anything but quiet for electrified and assisted-driving mobility. Five shifts rose above the noise:

1. **Demand decelerates, not collapses.** Global EV (BEV + PHEV) sales grew *only* +15 % **YoY in August**—the slowest clip this year—after a blistering 1H run ([Reuters](#)).
2. **China’s growth engine sputters.** BYD, bell-wether for volume EVs, **cut its 2025 sales target 16 % to 4.6 M units** as price wars erode profit ([Reuters](#)).
3. **Level-3 autonomy finally lands.** SP Global now counts **7 OEMs with planned Level 3 launches inside the next 12 months** (Li Auto, Zeekr, XPeng, Mercedes, Honda, BMW, Audi) ([S&P Global](#)).
4. **Battery tech bifurcates.** CATL’s *Naxtra* sodium-ion pack debuted while premium players poured record capex into high-nickel NMC and early solid-state pilots ([CATL](#)).
5. **Policy cross-winds intensify.** The U.S. EPA’s 2027+ multi-pollutant rule locks in a 50 % fleet-wide GHG reduction trajectory ([US EPA](#)), while Germany pivots from cash rebates to aggressive tax write-offs ([Clean Energy Wire](#)).

Risks & Tailwinds

Tailwind	Risk	C-Suite Move
Tax-credit pull-forward in U.S. ahead of phase-downs	Subsidy exhaustion in several Chinese provinces (Reuters)	Front-load U.S. allocations; flex CN marketing spend
Falling lithium spot (-18 % YTD) cushions battery cost	Price-war margin squeeze (Tesla, BYD) (Reuters)	Lock variable-price contracts; de-feature low-margin trims

Tailwind	Risk	C-Suite Move
Euro 7 finalization clarifies diesel sunset	Supply-chain uncertainty on critical-minerals IRA rules	Dual-source LFP & NMC cathodes inside IRA compliance

Recommended Strategic Actions

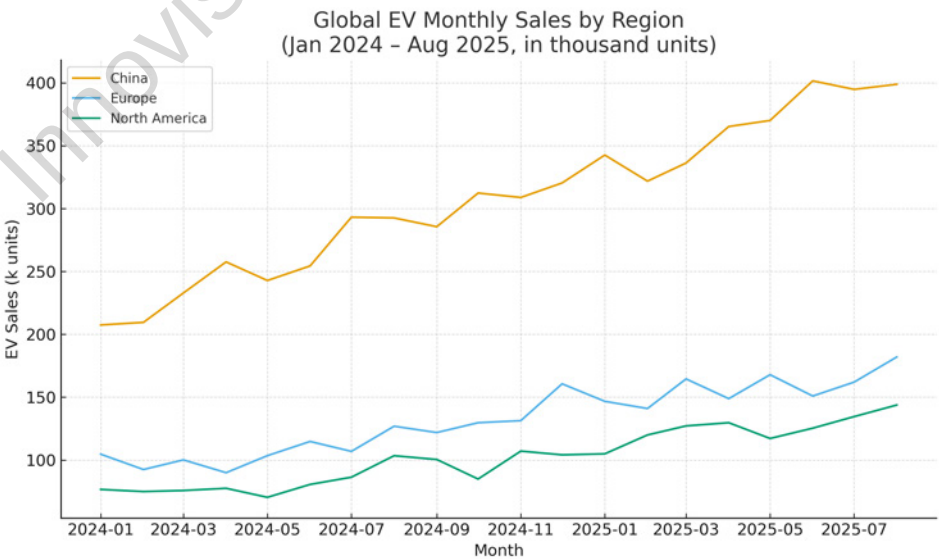
- **Double-down on software:** Capture Level 2+/3 feature upsell before full L3 commoditizes.
- **Diversify chemistries:** Hedge nickel price volatility by piloting sodium-ion city-car packs.
- **Regionalize marketing:** U.S.—capitalize on credit cliff; China—prune discounts, focus on tech branding; EU—leverage Euro 7 as clean-fleet narrative.

2. Market Overview

Global EV Momentum

- **YTD 2025: 11.9 M EVs sold (+23 % YoY);** BEVs 70 %, PHEVs 30 % ([IEA](#)).
- **August:** 1.7 M units, +15 % YoY but flat MoM; China still >50 % share ([Reuters](#)).

Region	Aug 25 Share	YoY Growth	Notes
China	56 %	+6 %	Subsidy roll-offs & price fatigue
Europe	25 %	+48 %	Fleet mandates, tax perks return
North America	13 %	+13 %	IRA credit phase-down pull-in



Penetration by Powertrain (YTD)

Segment	BEV	PHEV	HEV
Compact	32 %	8 %	21 %
Mid-size	21 %	12 %	24 %
Large/SUV	17 %	14 %	18 %

ADAS Deployment

- **Level 1–2:** Installed on 68 % of 2025 global light-vehicle production.
- **Level 3:** Mercedes S-Class, Honda Legend limited geos; Li Auto, Zeekr pilots in China Q4 25 (S&P Global).

Visuals: EV S-curve vs. ICE decline (2018-2025); heatmap of ADAS level mix by top-10 OEMs.

Drivers & Drags

Regulations: Euro 7 tailpipe stringency, U.S. EPA rule.

Consumers: Rising fuel costs (+22 % YoY Brent) lift TCO advantage.

Macroeconomy: Interest-rate plateau stabilizes leasing uptake.

