

2026 Automotive Analyst Outlook

15-Dec-2025 16:39 GMT

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S&P Global Mobility’s 2026 Automotive Analyst Outlook provides expert insights on the industry challenges and opportunities.

S&P Global Mobility’s 2026 Automotive Analyst Outlook presents a comprehensive collection of insights, reflections and forward-looking perspectives from our team of analysts. Drawing on a year marked by volatility, innovation and adaptation, our experts examine how the global automotive industry navigated the challenges and opportunities of 2025 — from supply chain disruptions and regulatory shifts to the evolving landscape of electrification, connectivity and consumer preferences. Through a diverse array of regional and sectoral viewpoints, the report captures not only the lessons learned during a turbulent year but also the strategies and trends that are set to shape the industry’s trajectory in 2026 and beyond. By blending data-driven analysis with seasoned opinion, this publication aims to equip stakeholders with a nuanced understanding of the forces at play and the potential pathways ahead. Whether you are an OEM, supplier, policymaker or investor, the following pages offer valuable context for decision-making in an industry that continues to redefine itself amid global change.



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