

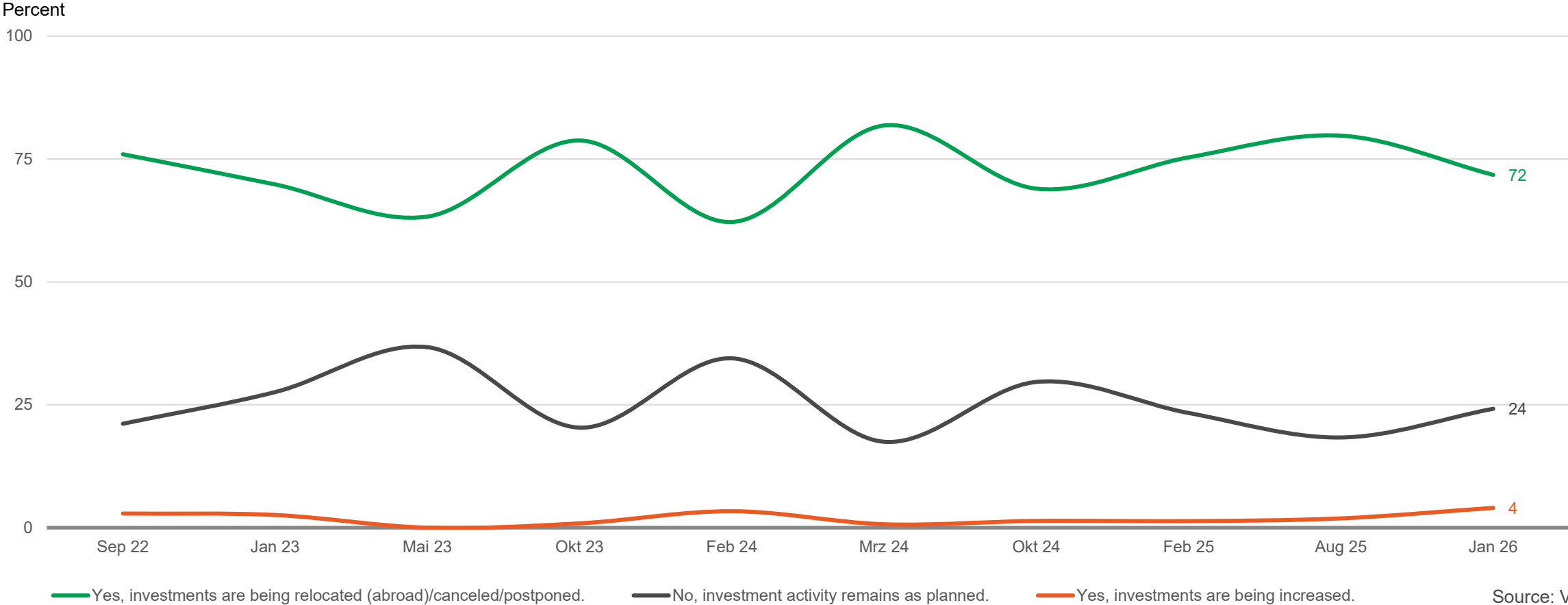
10.02.2026

Press material for VDA annual press conference 2026

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Germany as industrial location: inattractive for investment

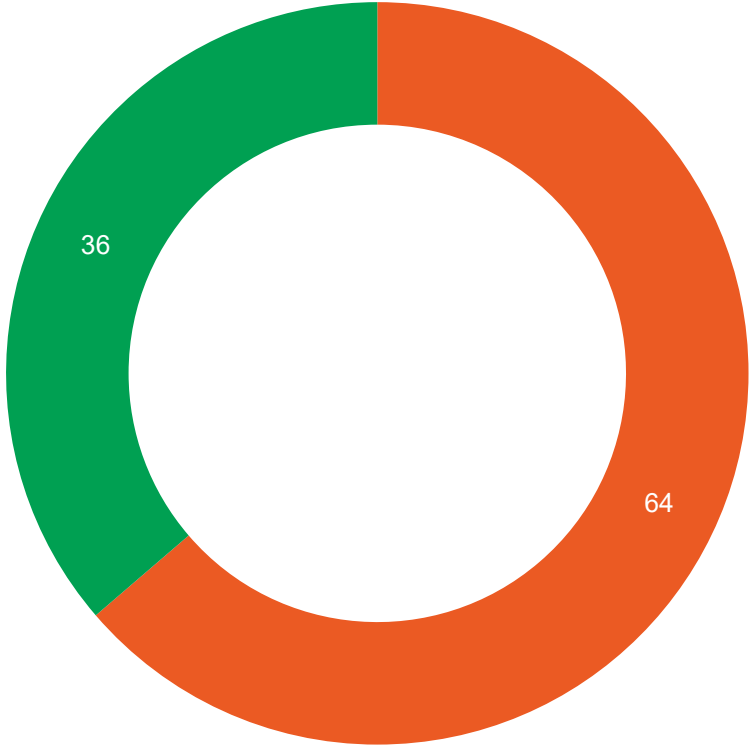
Is the current situation leading to an adjustment of your company's investment activity in Germany (compared to last year's plans)?



Germany's lack of competitiveness is reflected in employment

In 2025, employment in the automotive industry in Germany declined significantly. Did your company reduce employment at its German locations in 2025?

Percent



N = 124

Yes No

Source: VDA

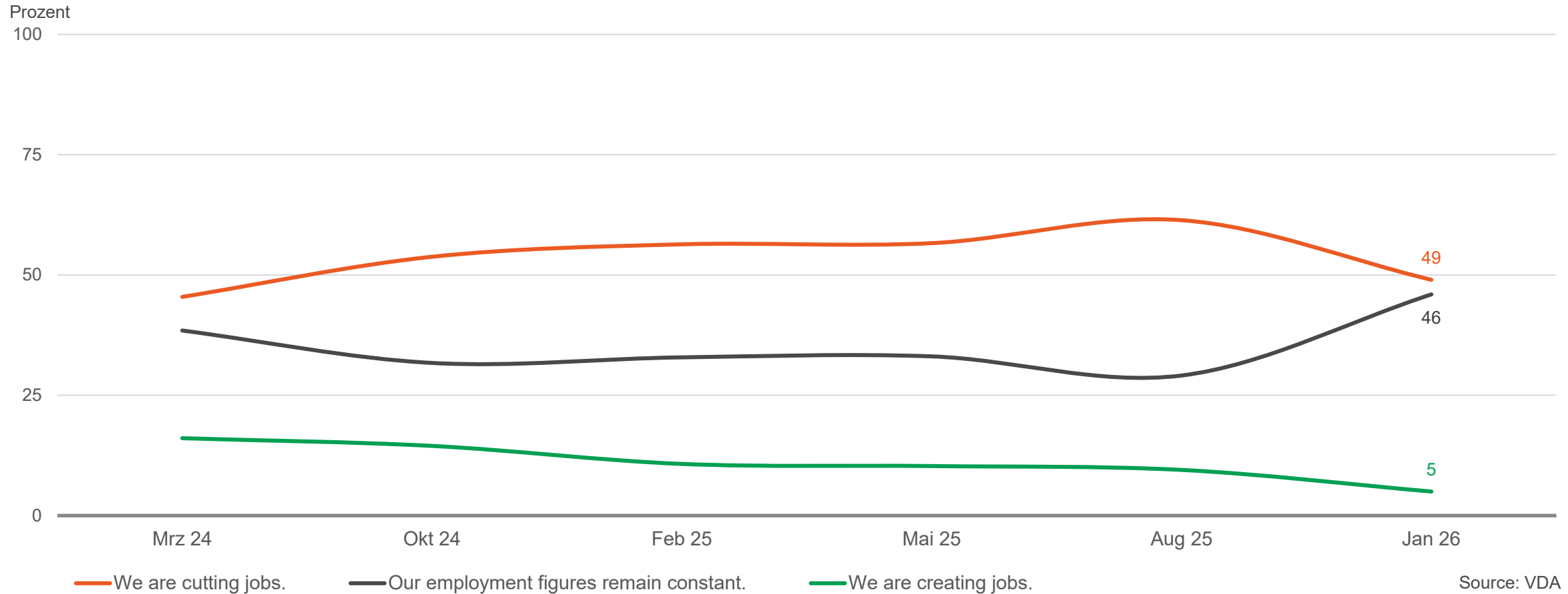
Around two-thirds of the companies surveyed reduced their workforce in.

87% of the companies that have reduced their workforce cite the lack of competitiveness of the location as a (very) major factor.

For every single company that reduced its workforce in 2025, competitiveness was not a factor.

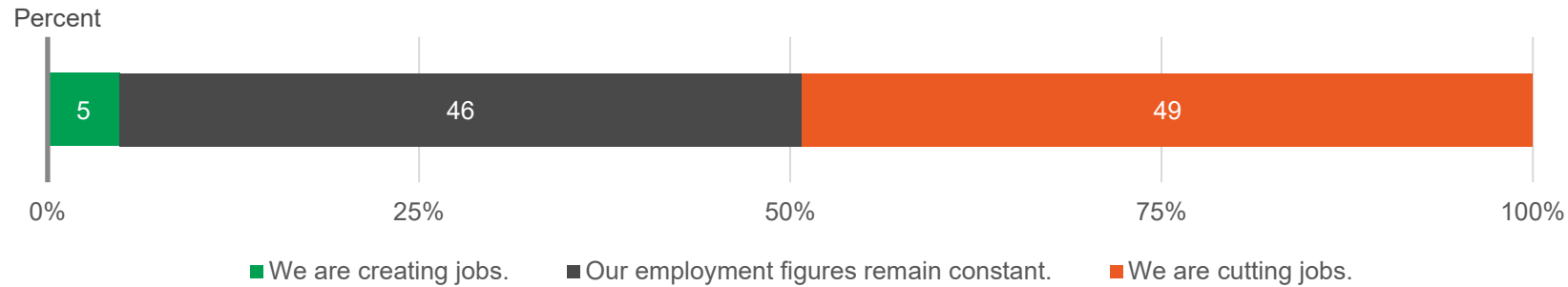
Roughly half of all companies in Germany are cutting jobs

Which statement applies to the employment situation in Germany at your company?



Job relocation abroad: Germany as a business location under pressure

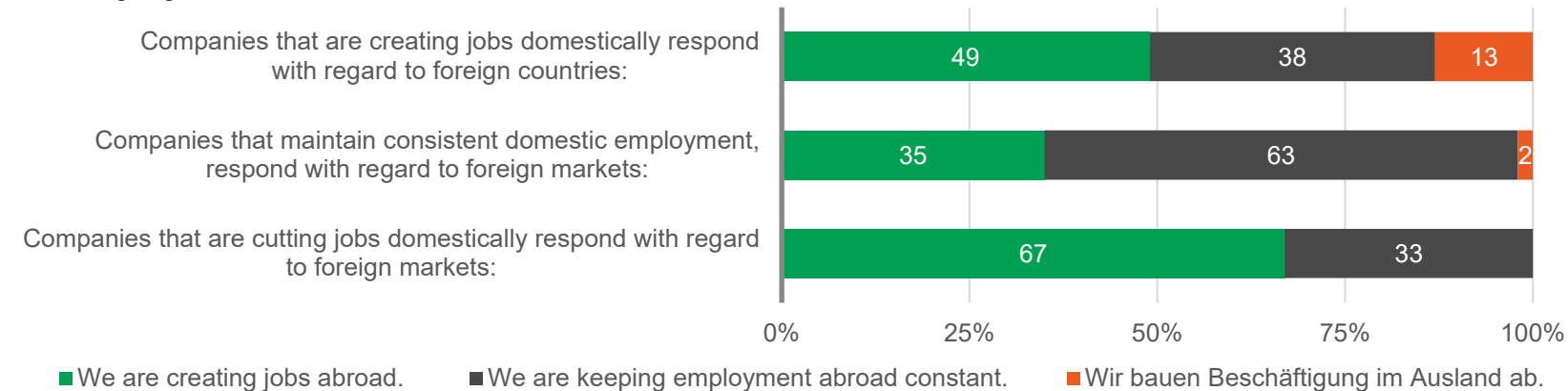
Which statement applies to the employment situation in Germany at your company?



Nearly half of the companies (49%) that are reducing employment in Germany are simultaneously increasing employment abroad.

Which statement applies to the employment situation abroad in your company?

Percentage figure

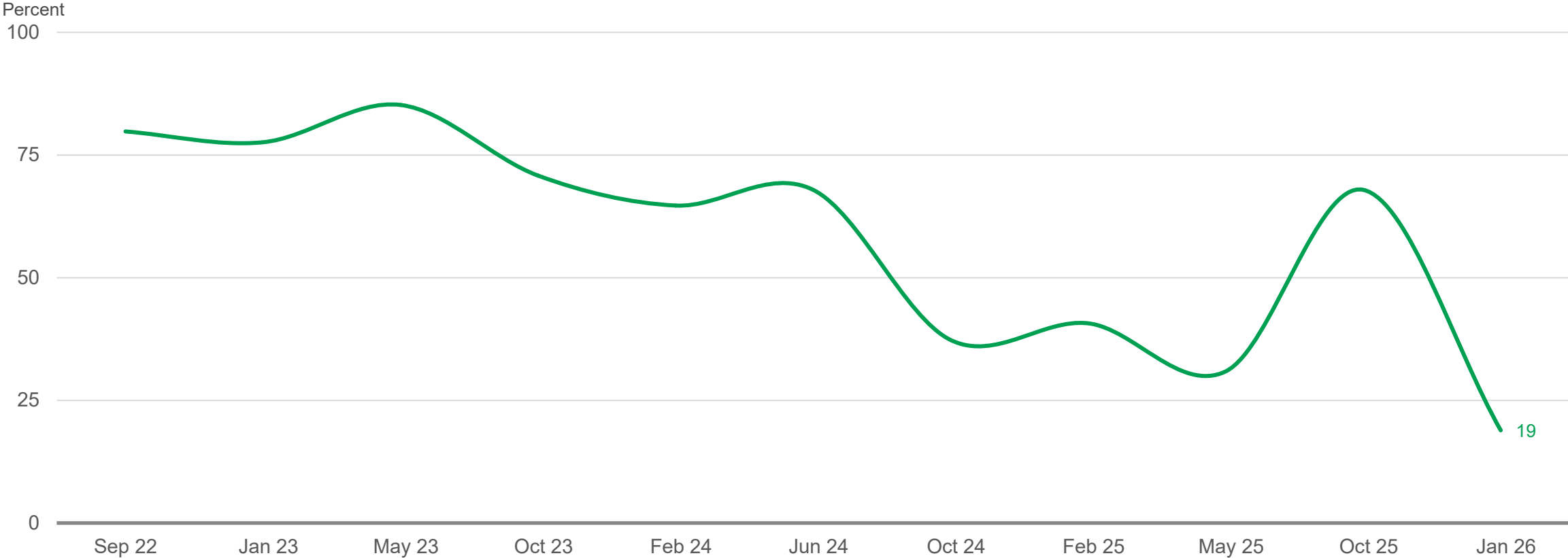


Only 6% of companies are reducing jobs in Germany and abroad.

One in four companies (24%) is downsizing in Germany and expanding abroad.

Reduced shortage of skilled workers and jobs highlights weak overall economic development

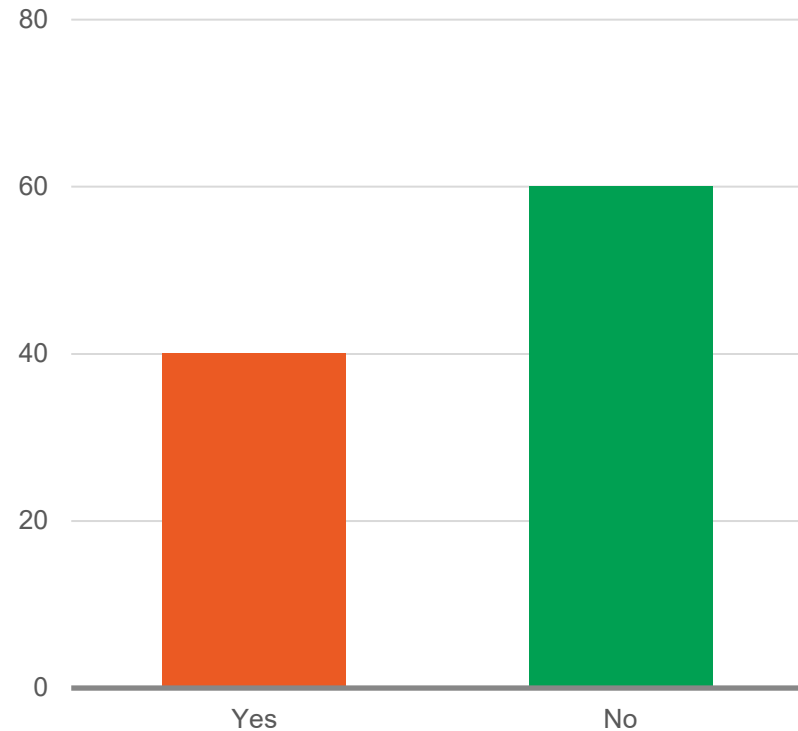
How much is the shortage of skilled workers currently affecting your company? – only answers "Very much" and "very much" accepted here



Financing conditions are a challenge

Has your company conducted loan negotiations with banks in the past three months?

Percent



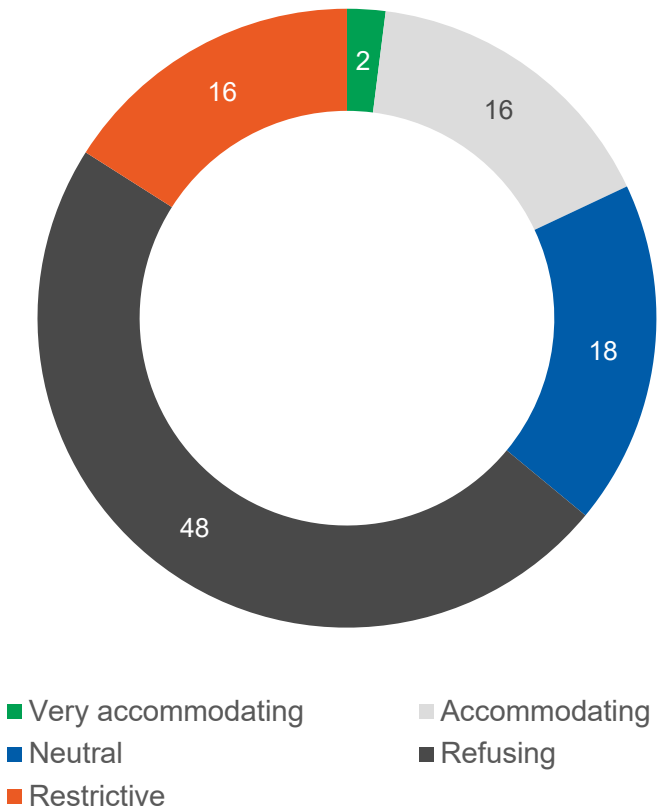
48% of companies that have conducted loan negotiations with banks in the past three months rate lending by banks as restrictive

16% of companies encounter a refusal from banks

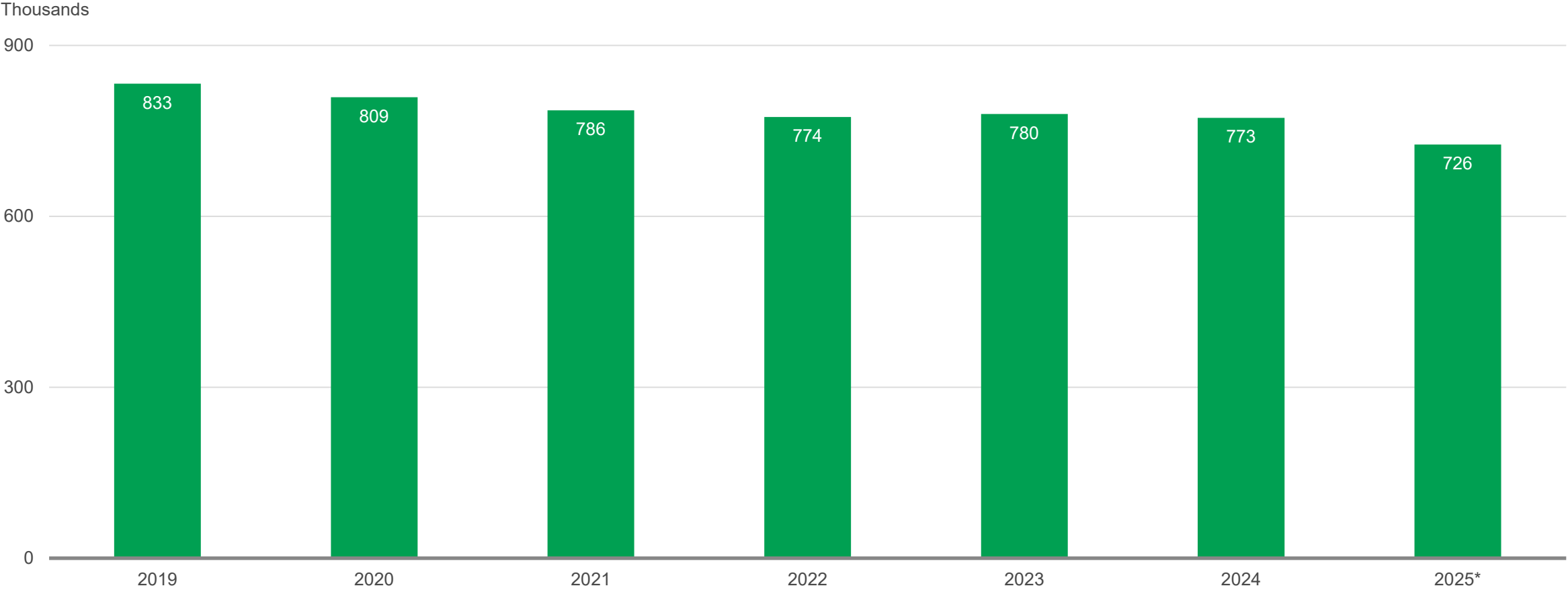
Only 18% experience (very) accommodating behavior during loan negotiations

How did the banks behave in loan negotiations?

Percent



Employment in the automotive industry declines

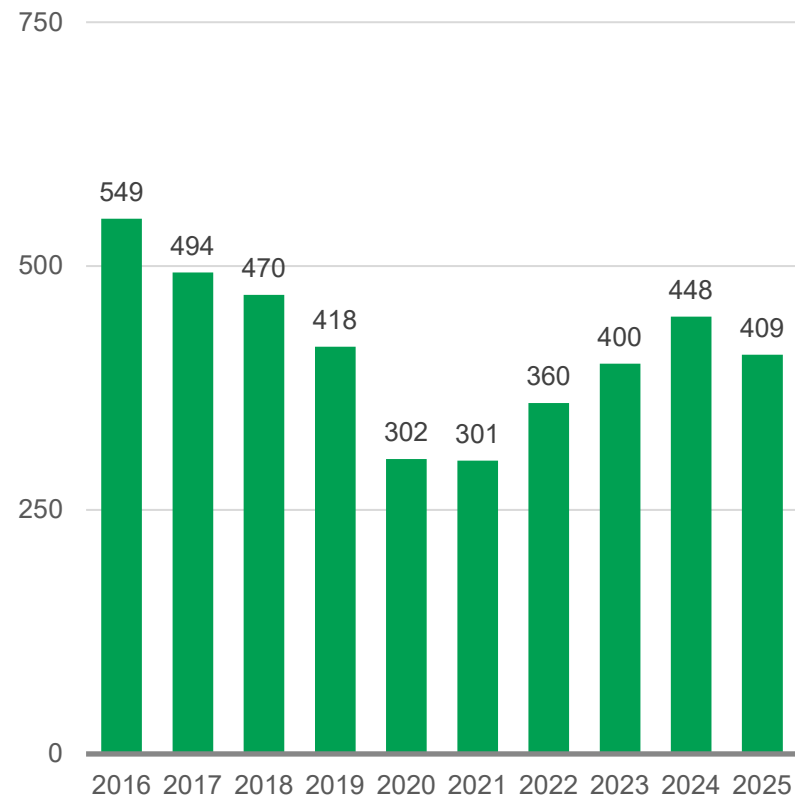


*2025: Estimated value based on monthly values from January to November

Source: Federal Statistical Office

Car exports to USA affected by tariffs

Car exports from Germany to USA
Thousands



German manufacturers primarily serve the US market with locally produced vehicles – in 2025 their US production amounted to 817,300 passenger cars

Car exports to the USA are about half the size of production by German manufacturers in the USA

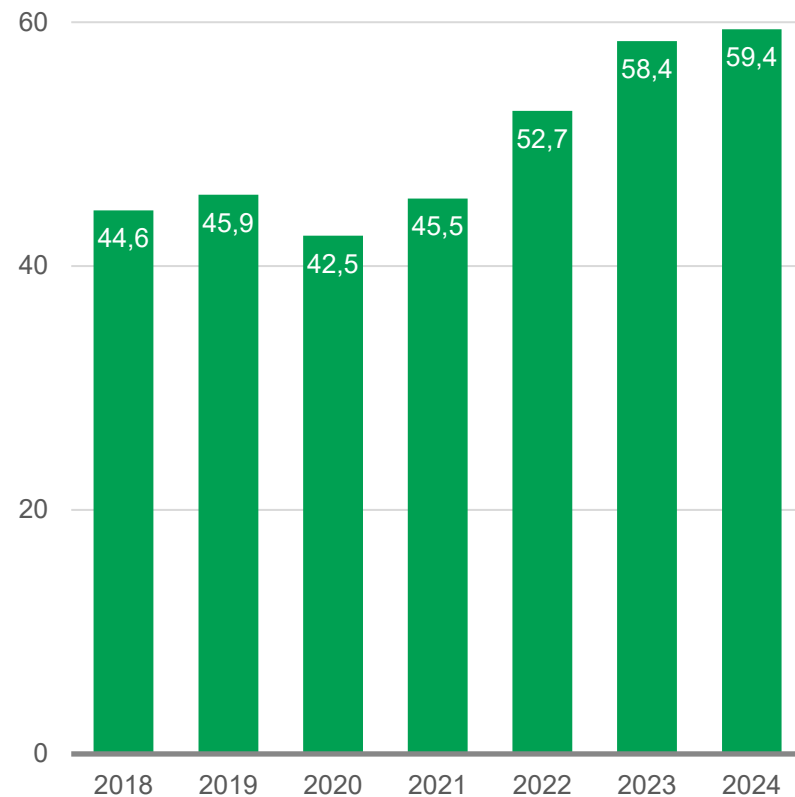
Exports to the USA have been declining since tariff increases in 2025

Car exports from Germany to the USA
Change vs. same period of previous year in %



German automotive Industry is investing in the future

Global investments of the German automotive industry in R&D
Billion €

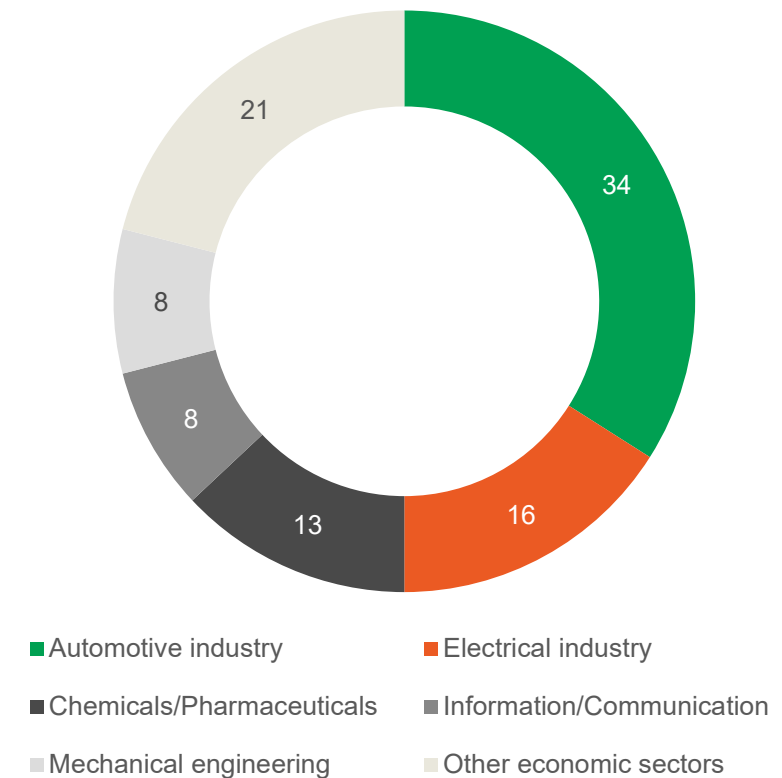


The German automotive industry is shaping the transformation with significant development efforts

The German automotive industry invests significantly more in research and development than any other sector of the German economy

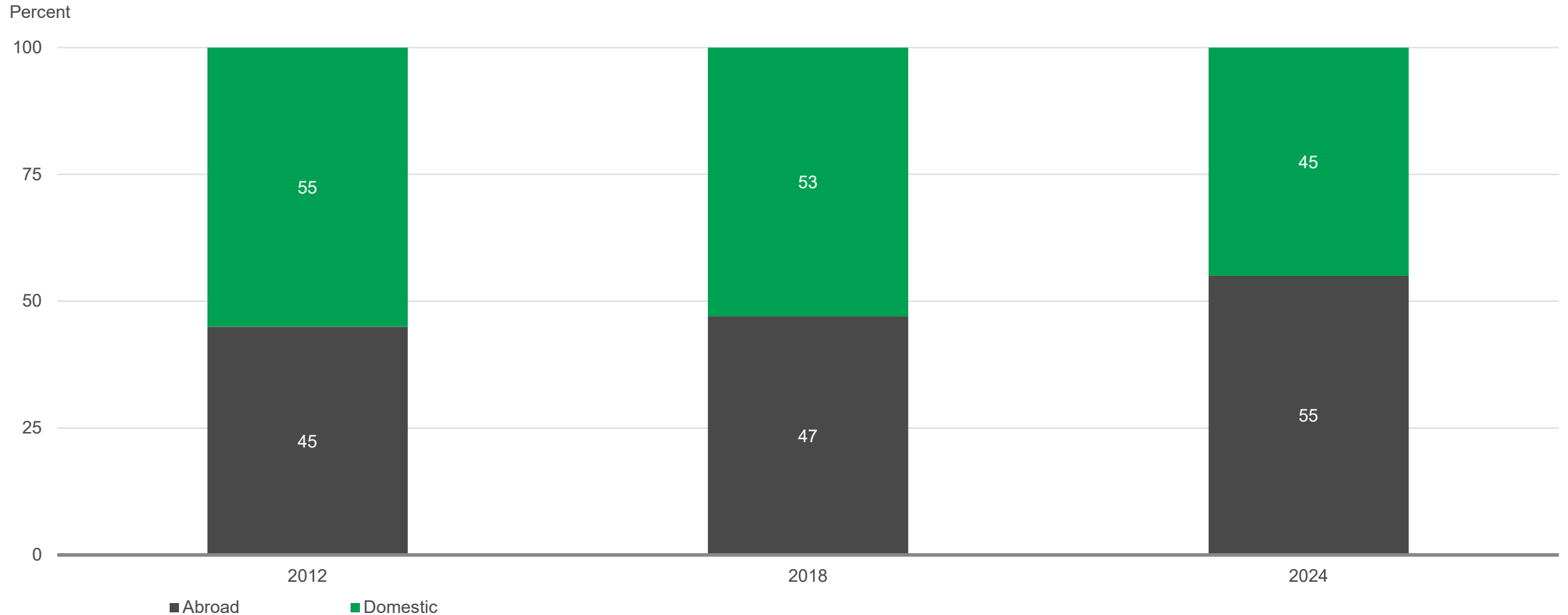
Whether investments are made in Germany or abroad strongly depends on the respective framework conditions

Internal R&D expenditures
Share of different economic sectors (2023)
in percent



Investments are increasingly going abroad

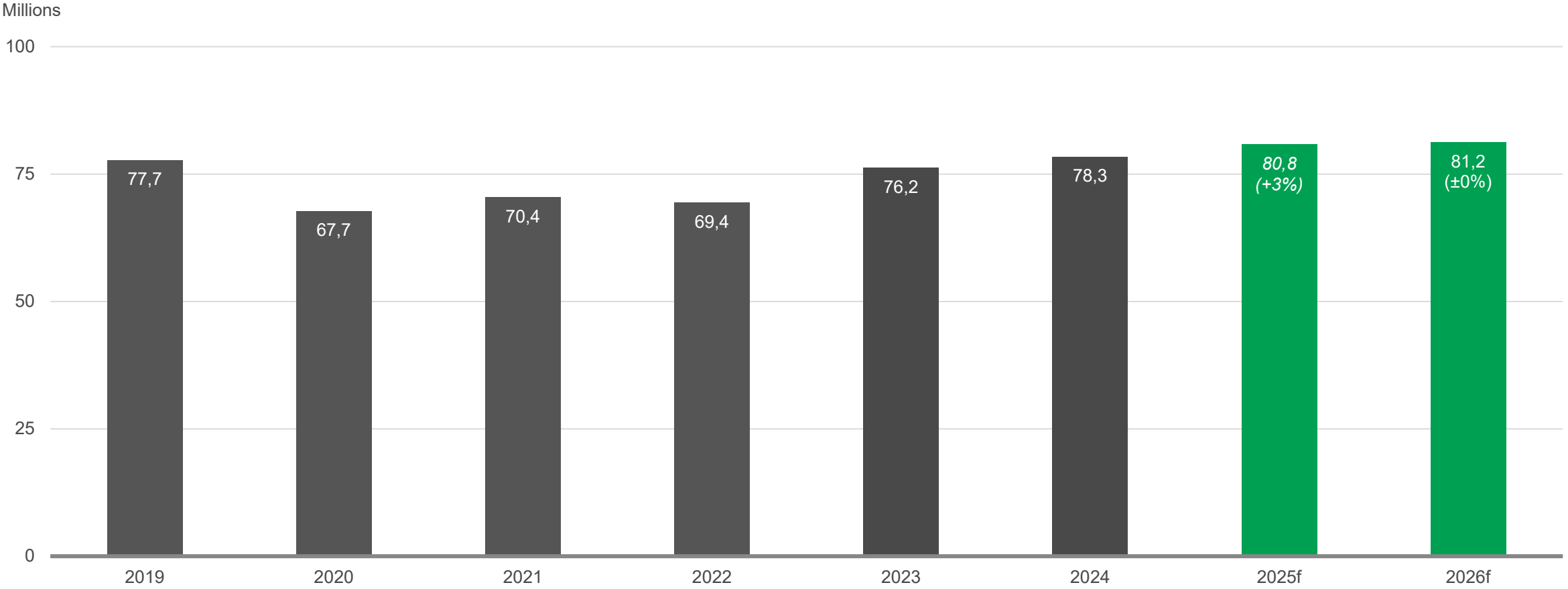
R&D and capital investments, German automotive industry



Source: Federal Statistical Office, Business reports

Global market in 2026 roughly at previous year's level

Global passenger car/light vehicle market

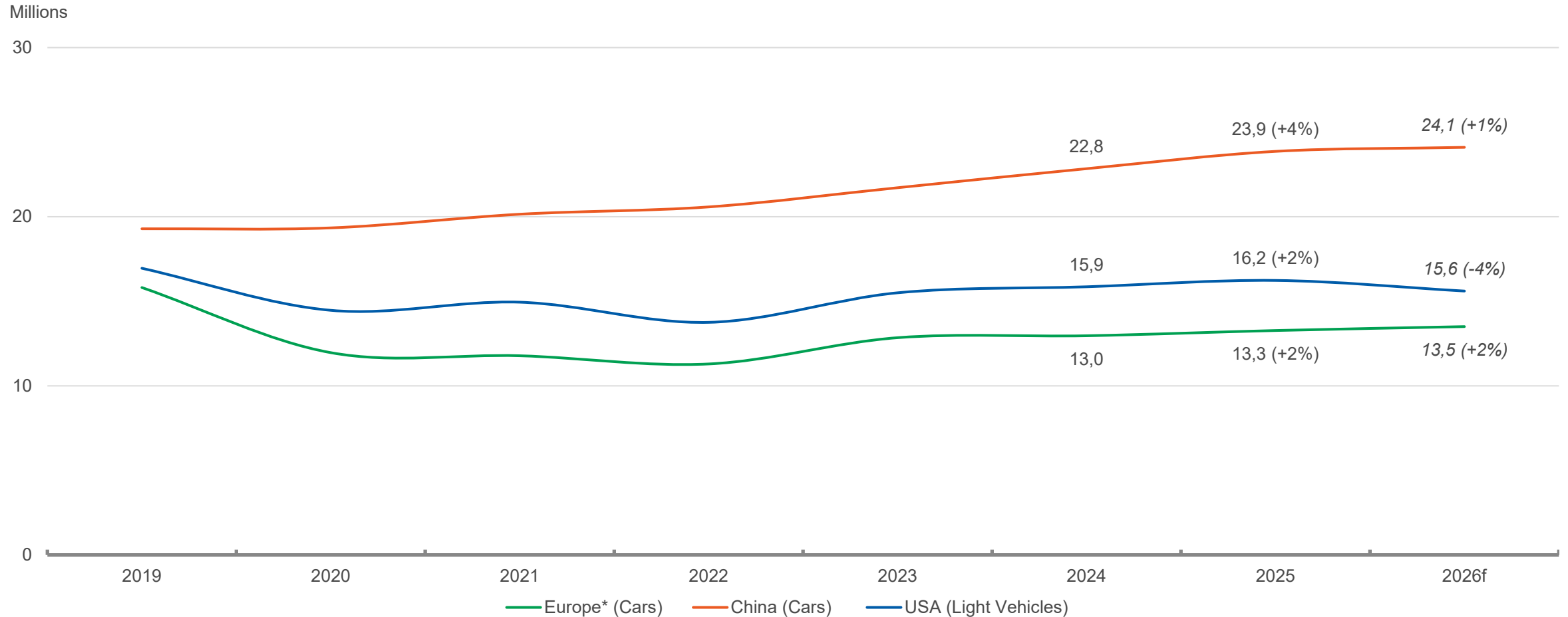


f: Forecast

Source: VDA

Europe at low level, USA weakening

Passenger car and light vehicle sales USA, China, Europe*

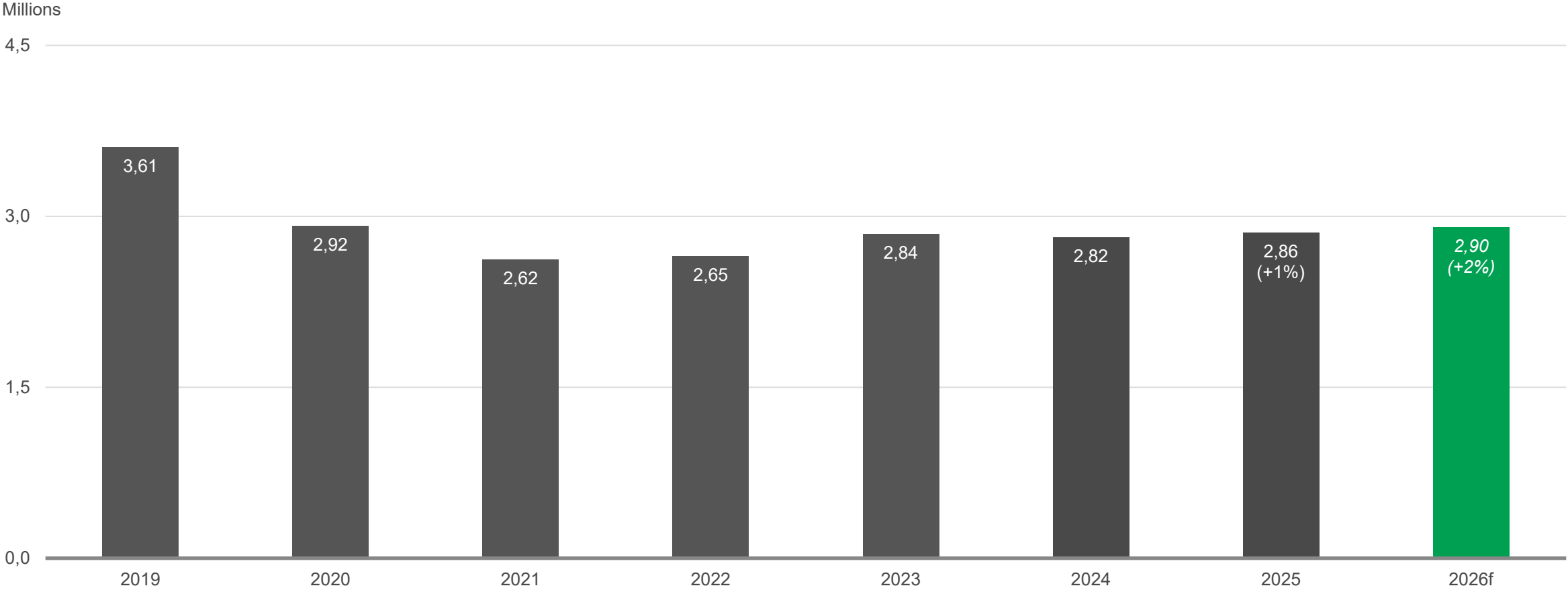


*Europe = EU, EFTA & UK
f: Forecast

Sources: VDA, ACEA, Omdia, CPCA

Market continues to grow at low rate

New car registrations in Germany

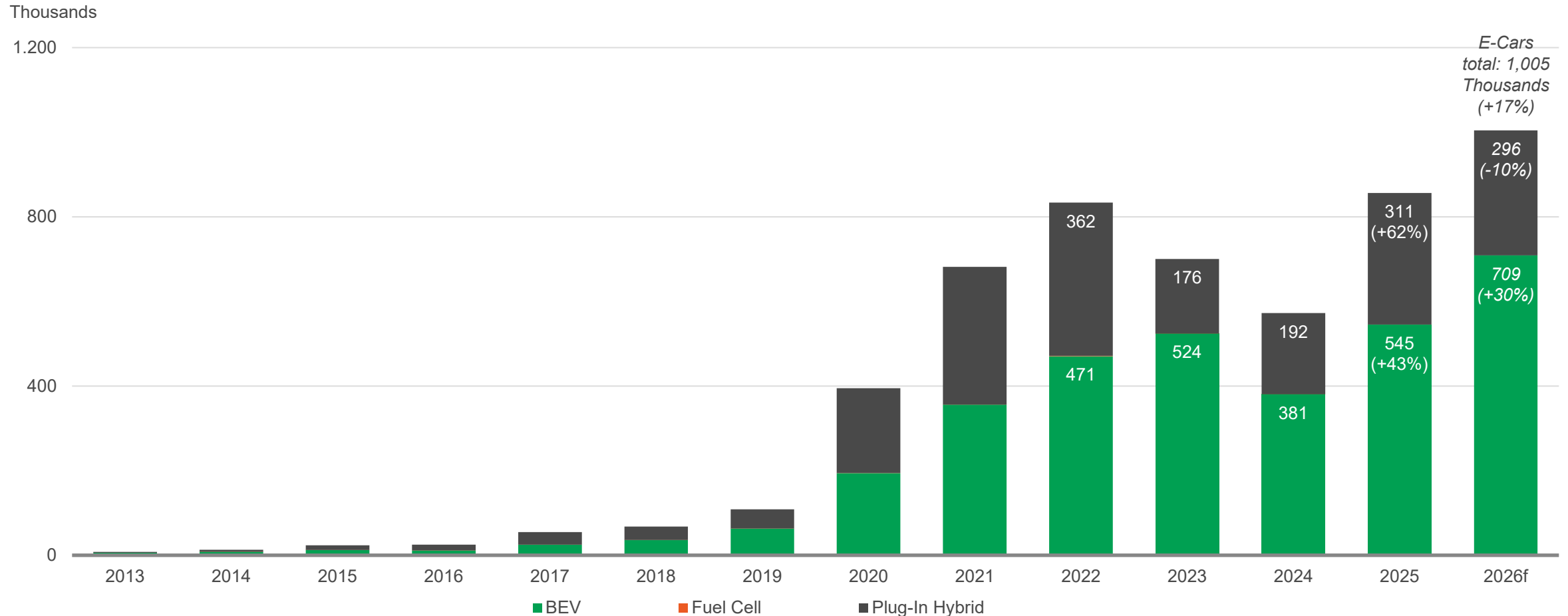


f: Forecast

Sources: KBA, VDA

Electromobility continues to gain

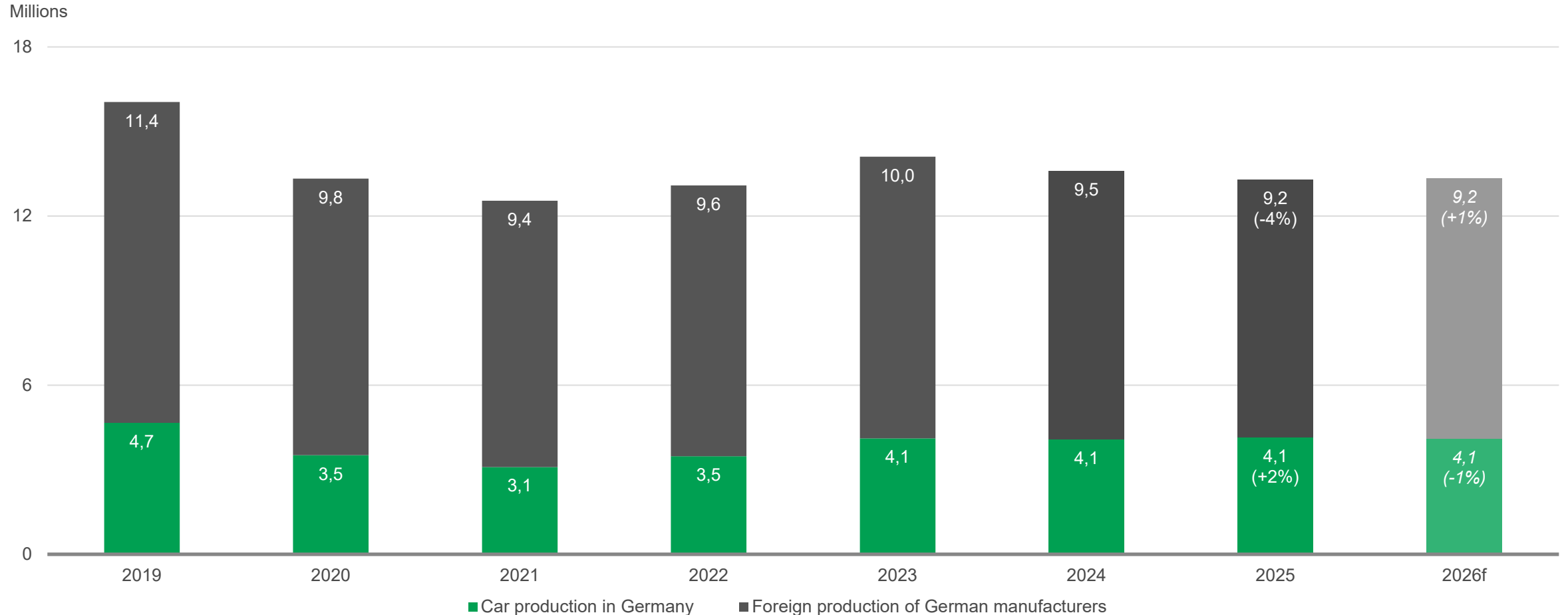
New registrations of electric cars in Germany



*E-Cars
total: 1,005
Thousands
(+17%)*

Domestic production falls to just over 4mn passenger cars

Passenger car production in Germany and foreign production by German manufacturers



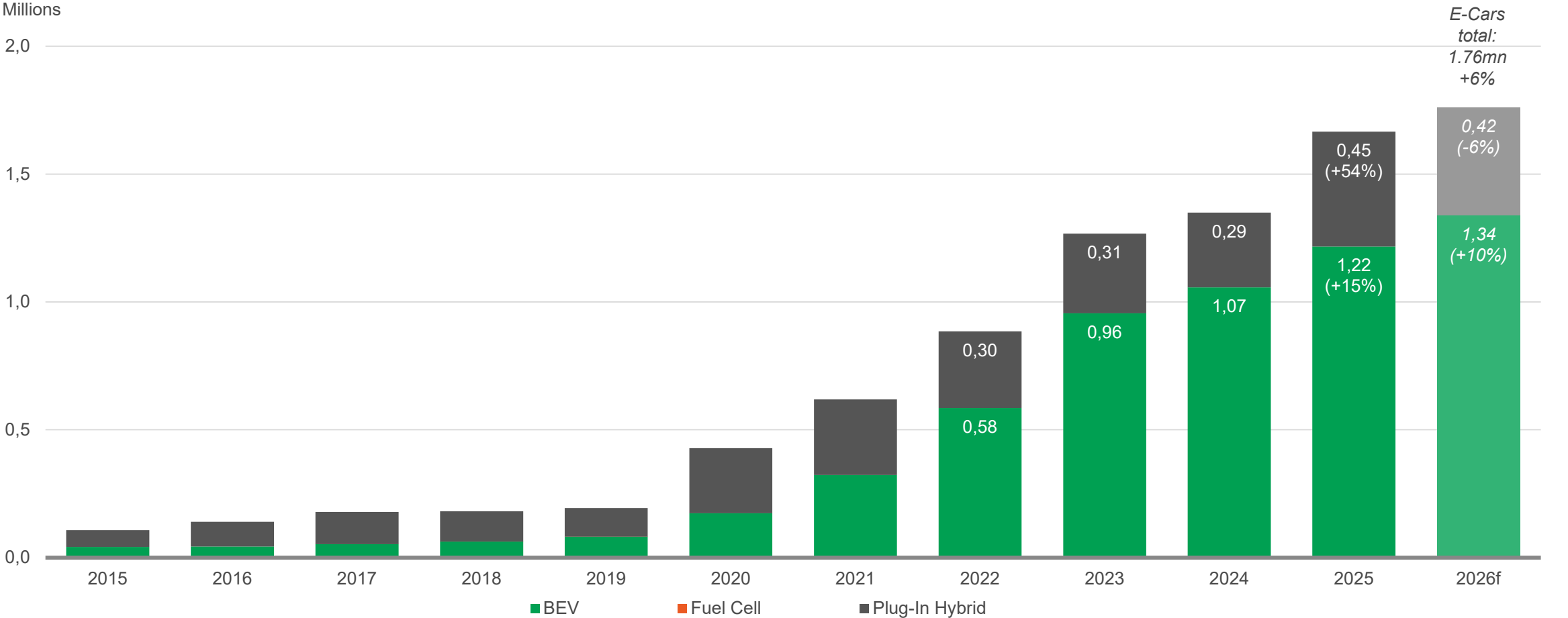
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Source: VDA



BEV production in Germany continues to increase

Electric car production in Germany by drive type



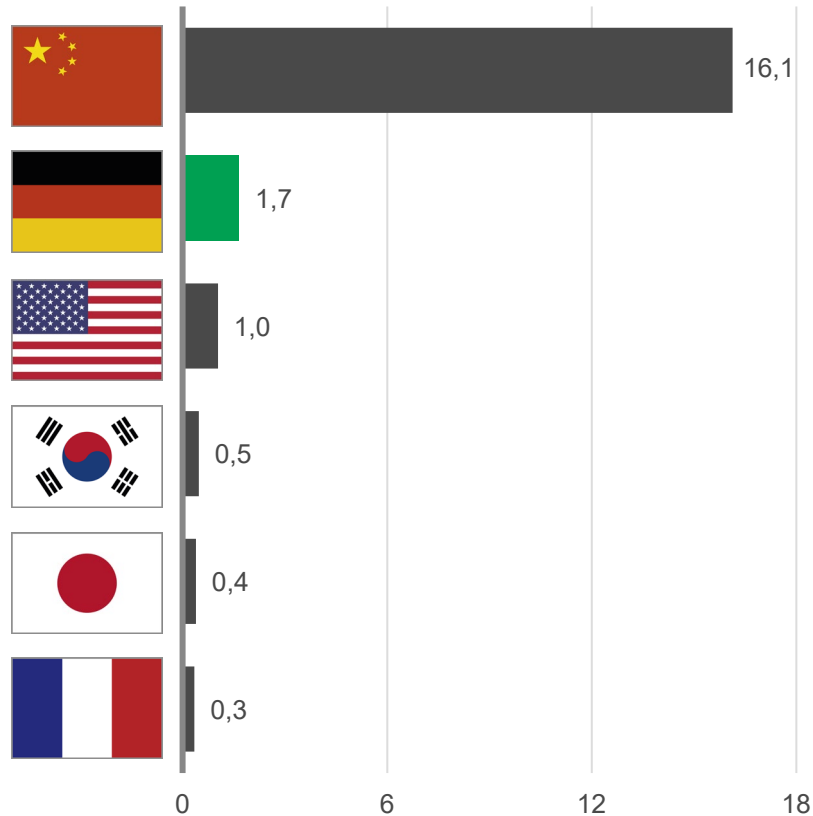
f: Forecast

Source: VDA

Germany is second largest production location for electric cars

Production comparison of cars and electric cars (BEV, PHEV & FC)

E-Car Production 2025, Millions

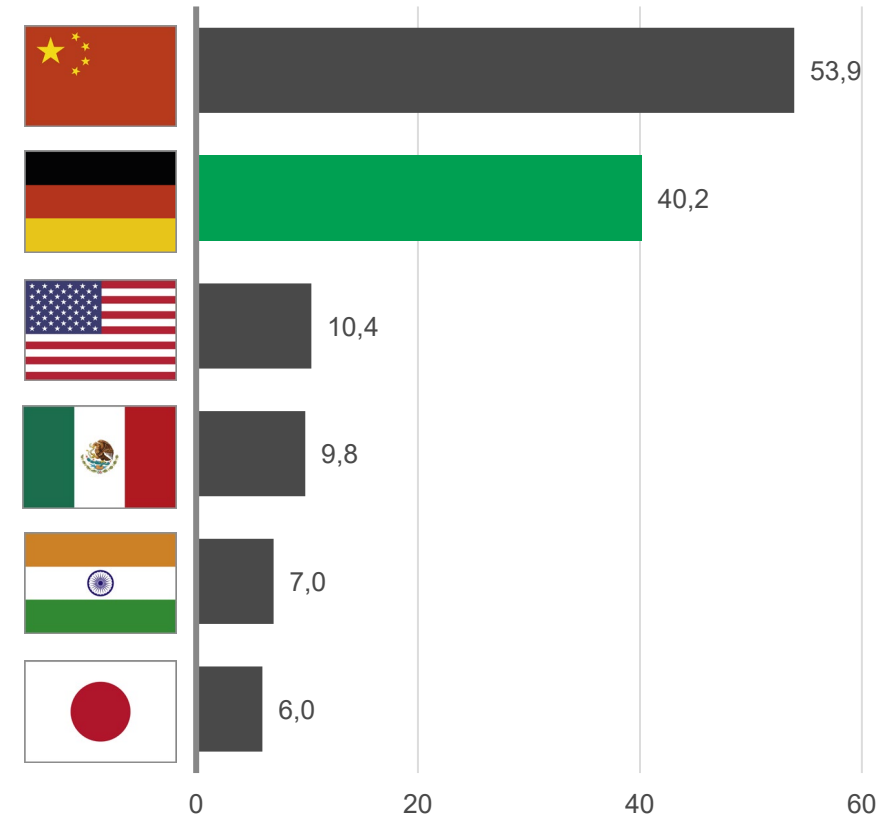


In 2025, 4.1mn passenger cars were produced in Germany

Germany has fifth largest passenger car production worldwide in 2025 – and will be in second place for E-car production

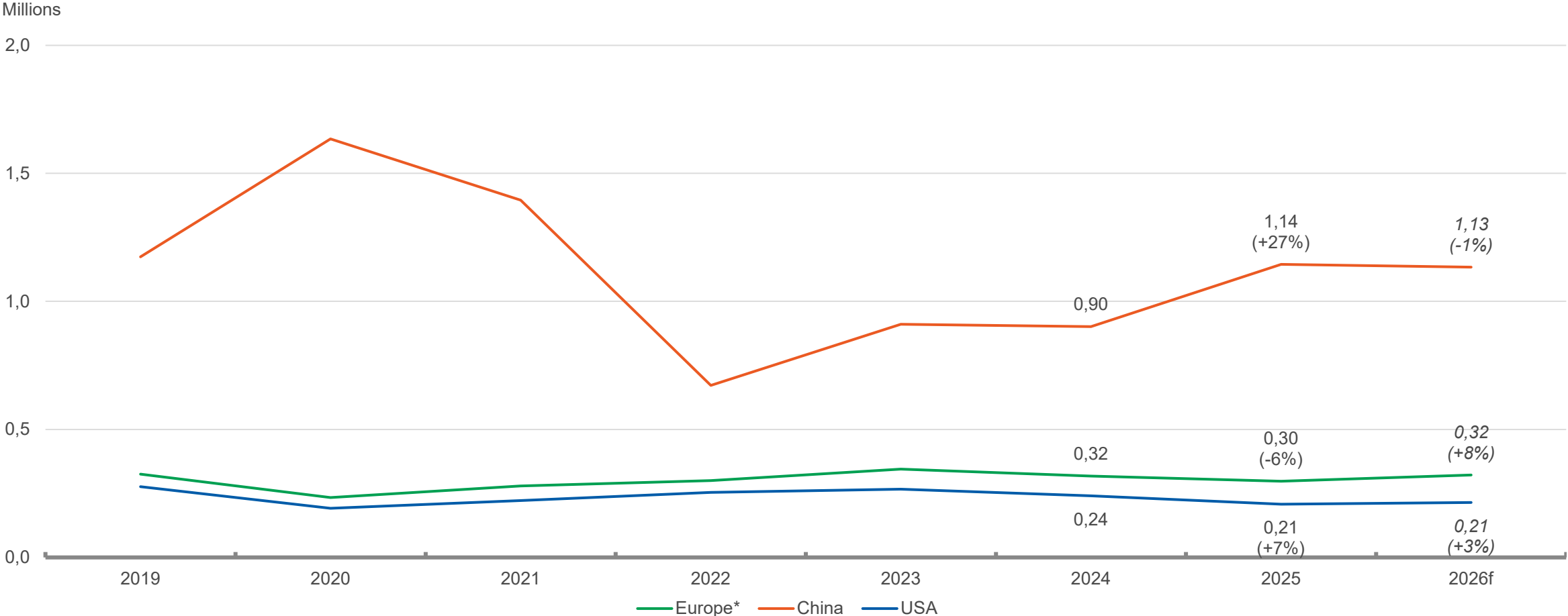
Share of electric vehicles in passenger car production in Germany particularly high

Share of E-cars in production in 2025, in percent



China dominates world market for heavy commercial vehicles

Sales of commercial vehicles > 16t by world region



Sources: VDA, ACEA, Omdia, CAAM