

AUTOMOTIVE MANUFACTURING: THE AUTO SECTOR'S FUTURE SUPPLY CHAINS

September 2026

In association with



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FOREWORD: SUPPORTING NEW AUTO SUPPLY CHAINS

From where we sit at the center of global trade, we see economic shifts earlier than most. Nowhere is this shift more evident than in the automotive sector, which is undergoing a historic transformation driven by the shift to software-defined vehicles (SDVs), autonomous driving and electrification.

As Tier 1 suppliers evolve into tech giants, original equipment manufacturers (OEMs) face the immense challenge of sourcing sensitive, high-value components like semiconductors and lithium-ion batteries as well as some rare earth materials.

The rapid advancement of critical technologies such as sensors, radar systems and specialized electronics has made these components incredibly expensive and challenging to source on a global scale.

Because this technology sector moves so quickly, it has created a highly dynamic market in which new, innovative players can easily emerge. As a result, the traditional, static supplier ecosystem is changing rapidly.

Looking to the future, we expect to see OEMs continuously diversifying their supplier networks, regularly adding new tech suppliers to their supply chains to secure these critical components.

Combined with shifting consumer demands and geopolitical pressures, traditional production planning has become incredibly difficult. Managing this cross-border complexity requires more than traditional logistics. It demands advanced insights and real-time adaptability.

SUPPORTING THE EVOLUTION OF AUTO MANUFACTURING

Tomorrow's automotive supply chain will be much more fluid, requiring unprecedented agility and logistics expertise to manage an ever-expanding roster of global, non-traditional vendors.

At FedEx, we are actively investing in digital capabilities to help our automotive customers shift from a reactive posture to a highly proactive one.

As the heartbeat of the industrial economy, we play a critical role in enabling global trade, connecting more than 99% of the world's GDP and transporting approximately \$2 trillion worth of goods every year. Each day, we move nearly 18 million packages, which generates 2 petabytes of operational data.

We use this massive data set to fuel our own intelligent systems, leveraging AI to anticipate disruptions, optimize routing and improve performance in real time for our customers.

Our global network and the data behind it empower our automotive customers to navigate massive industry shift in real time. We are closely tracking the powerful intersection of advanced data capture and predictive analytics, the integration of sensor technology with AI.

Through our refreshed structure and a deep emphasis on commercial growth, AI and data, tech modernization and talent development, we are reinforcing our position globally as a supply chain technology leader.

IMPROVING INDUSTRY INSIGHTS

By leveraging AI, digital tools and real-time sensor data, we are moving beyond basic tracking into true predictive intelligence. This shift empowers OEMs to make highly informed, data-driven decisions at every level of their operations.

A great example of this is our recent strategic collaboration with ServiceNow, which allows customers to leverage our real-time supply chain intelligence for faster, more confident decision-making.

Collaborations like this can be scaled directly to help us innovate and build more collaborative, resilient and optimized solutions for our automotive customers. Practically, this means we can anticipate and navigate disruptions before they impact the production line.

On a tactical level, this could look like dynamically rerouting a critical shipment of components in real time to avoid a sudden severe weather event.

Looking further upstream, it means forecasting complex, long-term scenarios such as predicting a shortage of a newly adopted biomaterial due to poor global crop yields.

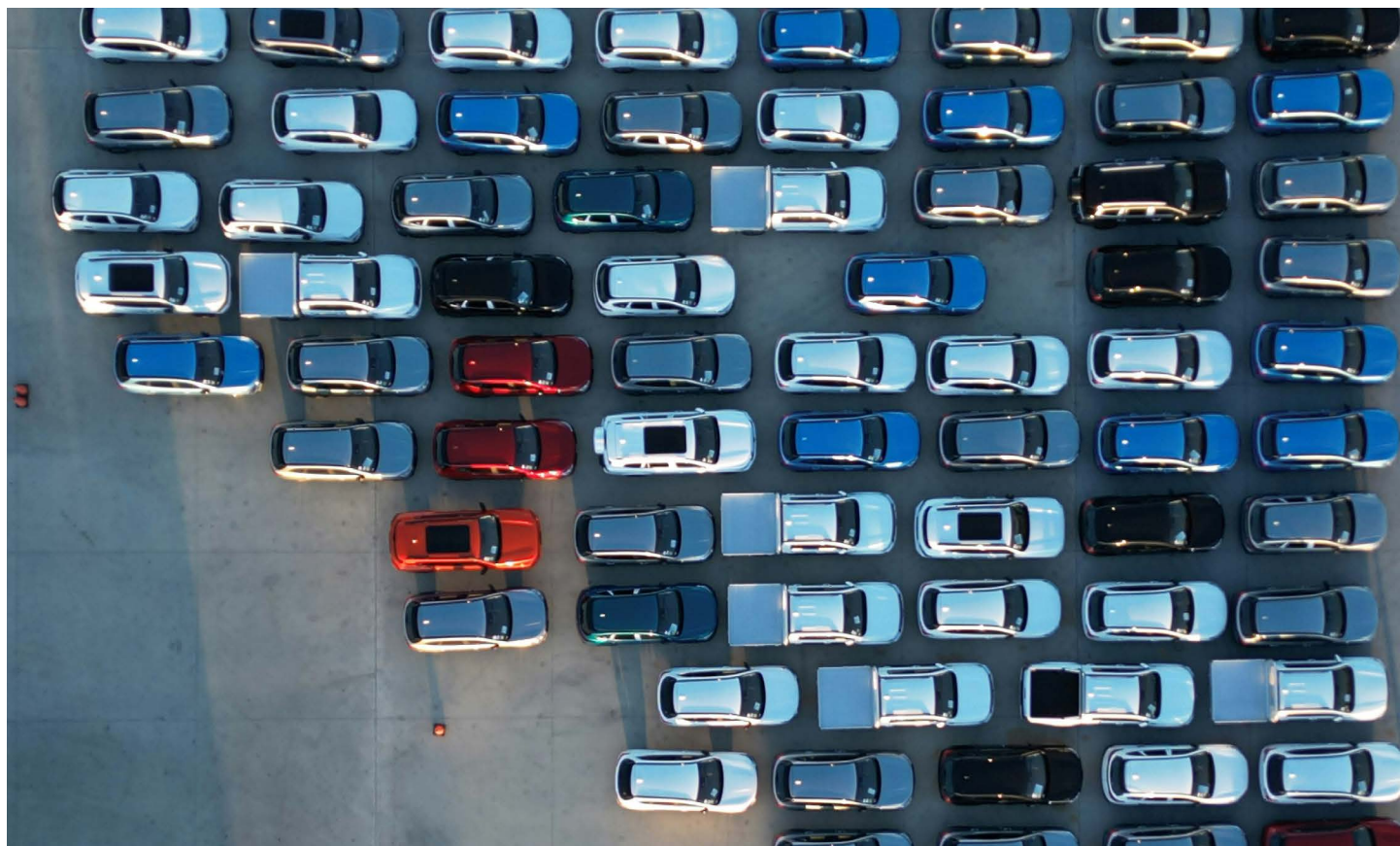
Having this level of granular, predictive foresight is exactly what will define the successful, efficient automotive supply chains of the future.



Rakesh Puri

*Vice president of marketing
(global verticals), FedEx*

"At FedEx, we are actively investing in digital capabilities to help our automotive customers shift from a reactive posture to a highly proactive one."



ALL CHANGE FOR AUTO INDUSTRY SUPPLY CHAINS

In June 2026 it looked as though all car sales in America's biggest auto market might be grinding to a halt. The reason? Carmakers needed more time to address a California law requiring them to install technology that could remotely deactivate tracking systems implicated in domestic violence cases.¹

The episode illustrated the extent to which auto manufacturers are working to keep up with demand for technological advances brought on by regulation and consumer preferences.

Alongside electrification, which requires new power systems and drivetrains, automakers are using sensors to develop self-driving cars and packing vehicles with increasing amounts of software aimed at improving everything from driver safety to in-car entertainment.

As a result, many of the components going into modern vehicles — from microchips to lithium-ion batteries — are ones that the auto industry has not had to source at scale before.

Getting hold of these items, and the materials required to make them, is putting pressure on established automotive supply chains and forcing OEMs to seek new sources of supply.

The challenges are particularly acute because the industry is facing several transitions simultaneously, seeking to develop electric vehicles, SDVs and autonomous vehicles at the same time. Furthermore, there is little clarity over how far and fast the automotive sector needs to evolve.

CHALLENGES IN ESTIMATING THE SPEED OF CHANGE

Western OEMs notoriously overcommitted to electrification in the early 2020s, investing heavily in battery plants and

associated production infrastructure based on overly optimistic estimates of consumer demand and regulatory support.

As a result, carmakers in the United States, where sales of electric vehicles (EVs) have dipped, are now seeking to repurpose battery factories so they can produce energy storage systems for the grid.² European carmakers, too, have been caught out by the pace of electrification.

Progress on SDVs has also been uneven, with some companies delaying SDV launch plans and increasing spend on electrification, software and new business.³

"In the long run, technology trends are going to drive unprecedented levels of efficiency across the future automotive supply chain," says Rakesh Puri, vice president of marketing for global verticals at FedEx.

But currently, he adds, "The most significant challenge facing today's automotive supply chains is the fundamental shift toward vehicles as highly advanced technological platforms."

The rise of SDV manufacturing "will be a major industry disruptor," Puri says, "mainly because it requires a completely differentiated sourcing strategy. We are seeing a shift in what goes into a vehicle and who supplies it."

"Because SDVs rely on advanced tech and computing hardware rather than just mechanical components, OEMs are having to build entirely new supplier ecosystems."

NEW DEMANDS FOR THE AUTOMOTIVE SUPPLY CHAIN

This shift in sourcing demands a highly agile supply chain that can seamlessly integrate new, fast-moving tech players on a regular basis, Puri says.

Also, "SDVs aren't just changing how cars are built; they are changing how they are maintained," he says. "We expect to see a massive impact on the aftermarket supply chain because many traditional services and parts are being replaced by over-the-air updates."

"By using software to fix or upgrade a vehicle remotely, we reduce the need for hardware-heavy parts and frequent visits to physical service centers. This shift will streamline aftermarket logistics and fundamentally change the economics of vehicle ownership and maintenance."

For now, though, the challenge for OEMs is how to build a path to this improved future while maintaining the supply chains required for traditional vehicle production and maintenance.

To find out how the industry is responding to these changes, in April 2026 Reuters Events and FedEx carried out a poll of automotive sector professionals worldwide, looking at developments including SDVs, autonomous driving, materials and components, sourcing and supply chain investment.

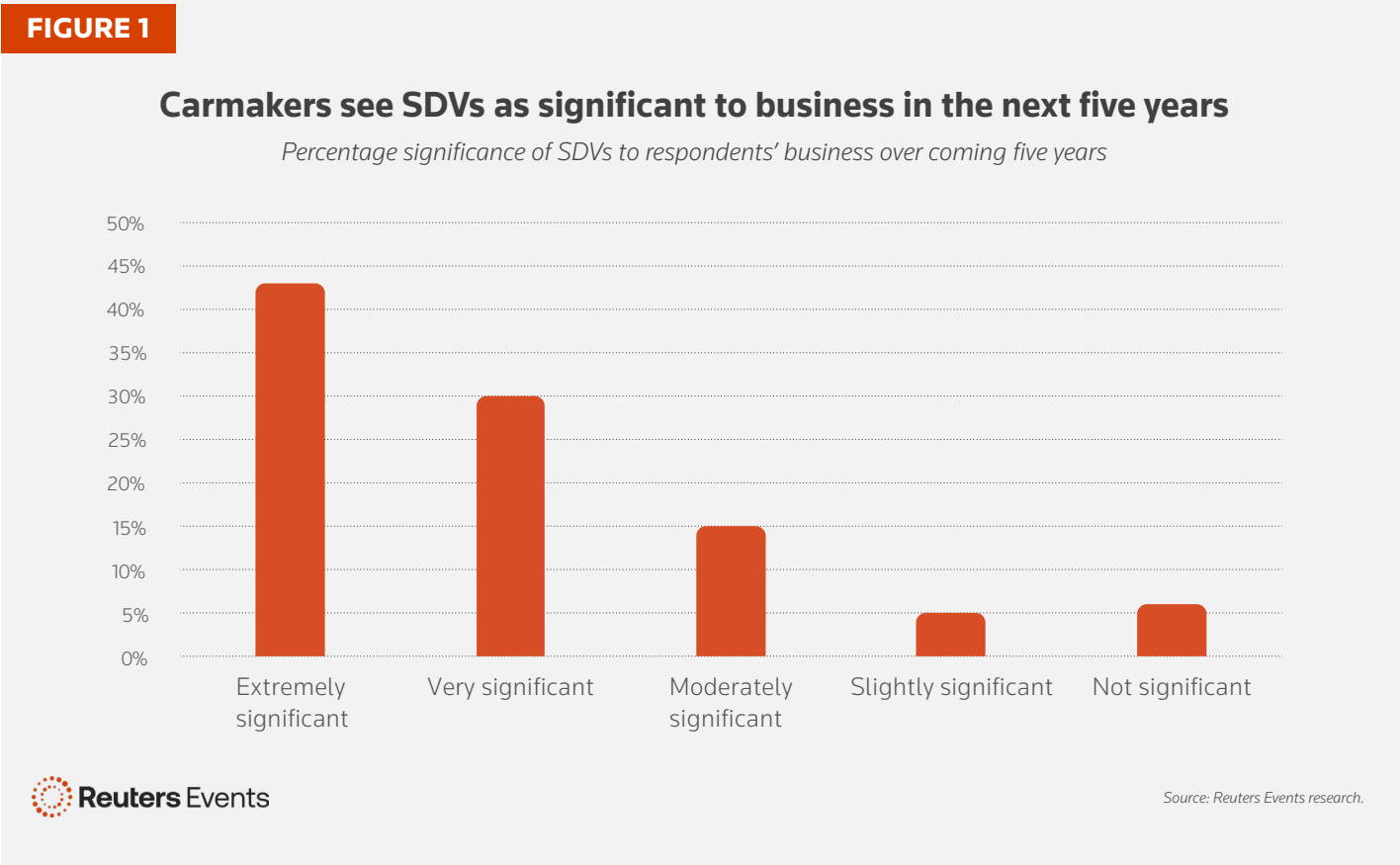
This report outlines the findings.

"SDVs aren't just changing how cars are built; they are changing how they are maintained ... We expect to see a massive impact on the aftermarket supply chain because many traditional services and parts are being replaced by over-the-air updates."

SUPPLYING SDVS AND AUTONOMOUS SYSTEMS

Notwithstanding challenges in SDV development, leaders are clear about the importance of software to the future of the industry. Only 6% of survey respondents believe SDVs will not

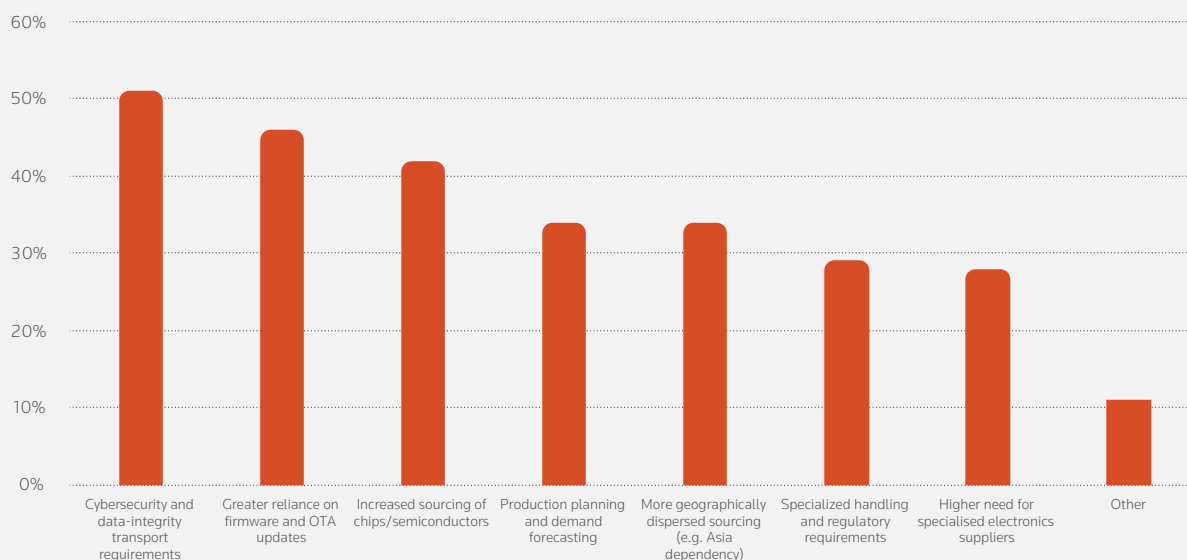
be significant to their business in the next five years, while 73% claim the vehicles will be very or extremely significant.



In terms of supply chain requirements, the advent of SDVs will increase requirements for cybersecurity and data integrity,

according to 51% of the sample, and drive reliance on firmware and over-the-air (OTA) updates, said 46%.

FIGURE 2

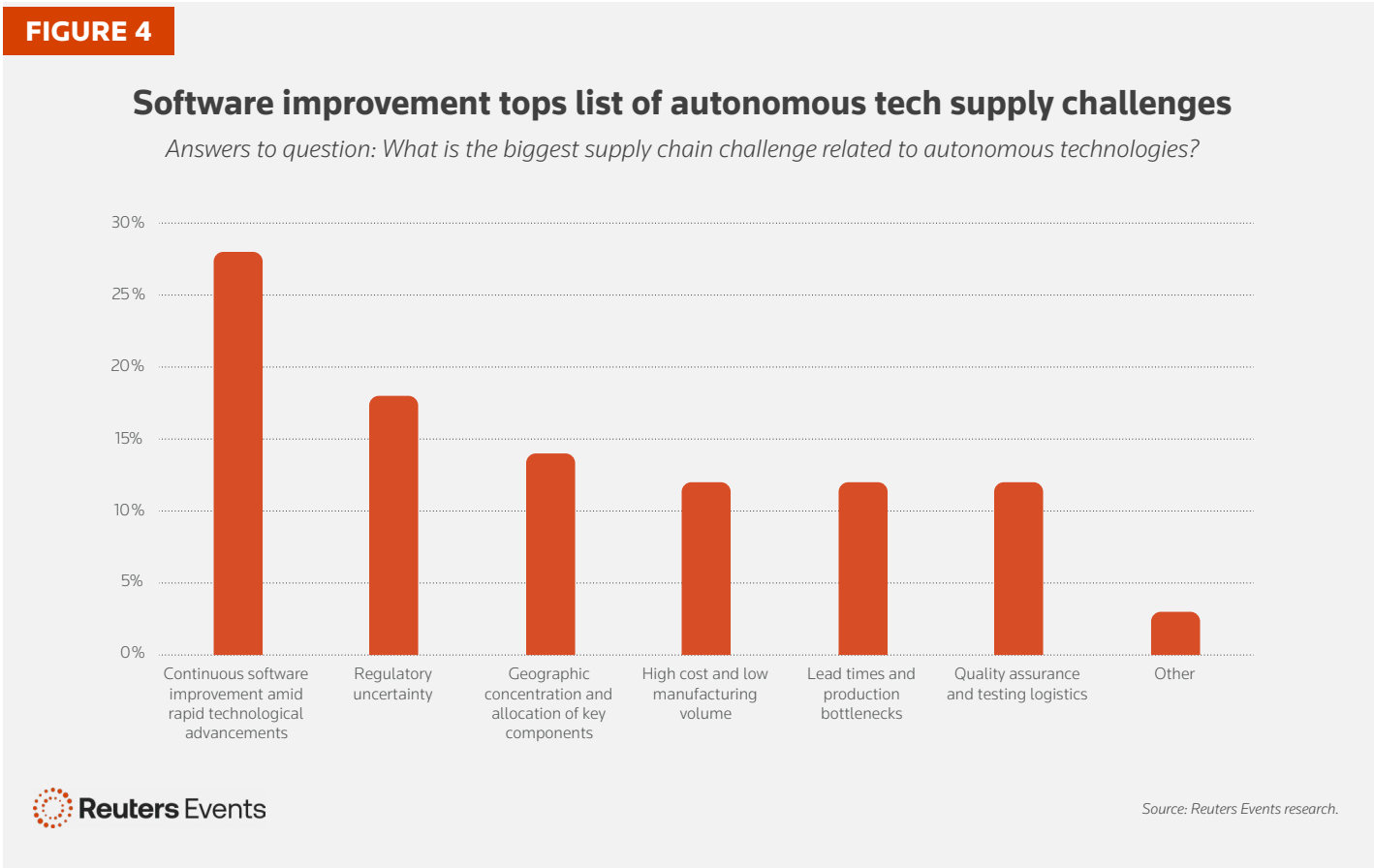
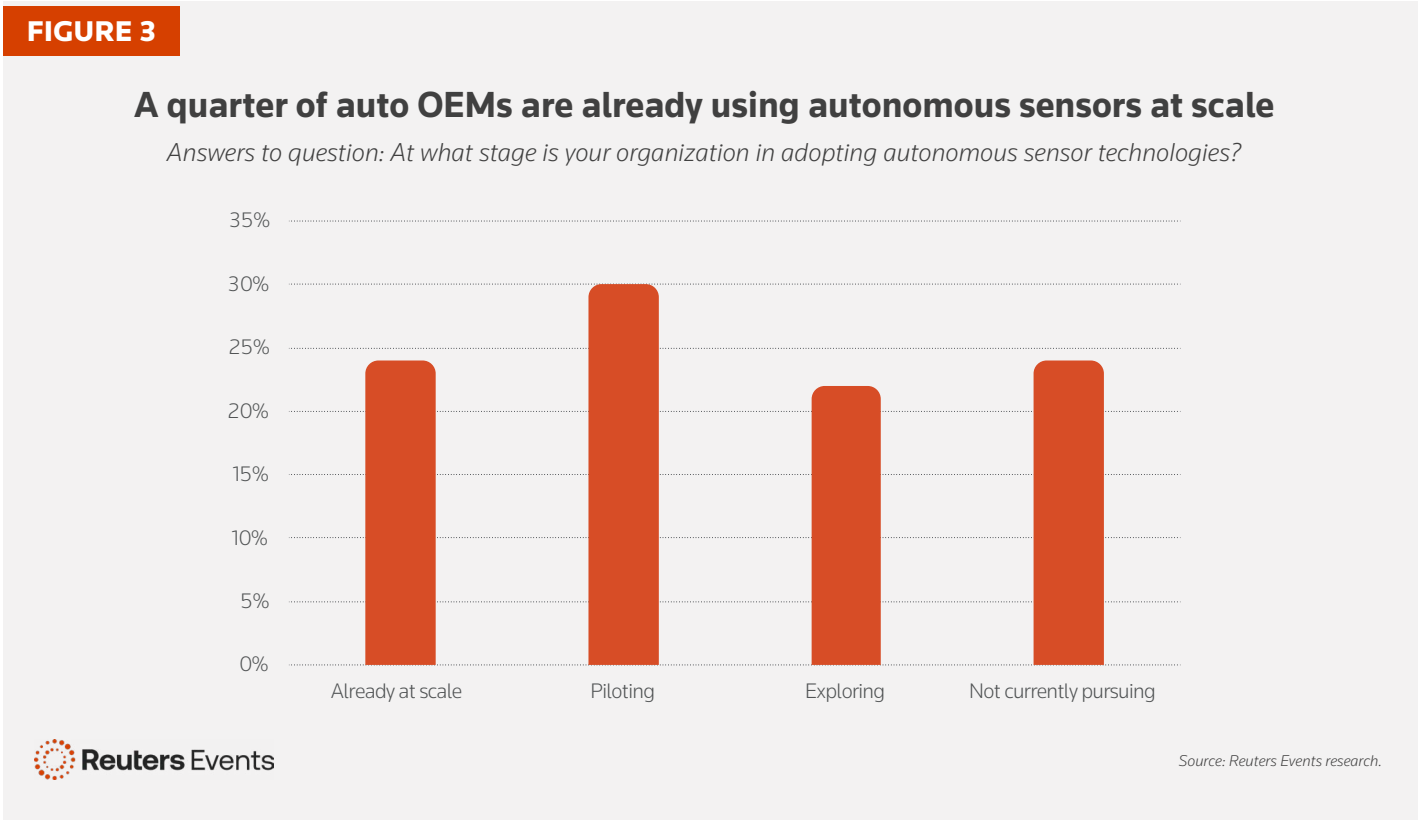
Cybersecurity and data integrity top SDV supply chain impacts*Percentage answers to question: Which aspects of SDVs will most impact your supply chain?**Source: Reuters Events research. Respondents could pick up to three options.*

Unsurprisingly, SDVs will also increase demand for semiconductors, which is likely to affect production planning and demand forecasting as well as sparking a need for more geographically dispersed sourcing, both aspects cited by 34% of the sample.

Linked to SDV development, 54% of companies polled are already piloting autonomous sensor technologies or using them at scale. Only 24% of those questioned said they were not currently pursuing autonomous sensor technology.

Sourcing autonomous sensor technologies poses a range of supply chain challenges. Top among these is the need to carry out continuous software improvements within a rapidly changing technology landscape, a concern cited by 28% of those in the survey.

Regulatory uncertainty was a worry for a further 18%, while 14% were concerned about the geographic concentration and allocation of key components. Other issues included high cost and low manufacturing volume, and lead times and production bottlenecks, both cited by 12% of the sample.



According to one survey respondent, self-driving vehicles are poised to “fundamentally transform” automotive supply chains in five ways:

- Enabling round-the-clock operations, reducing transit times and inventory holding costs. “This will help streamline the movement of many types of parts, and even finished vehicles, across the supply chain,” they said.
- Integrating advanced data analytics as SDVs equipped with sensors and connectivity generate vast information streams for predictive maintenance, demand forecasting and routing optimization.
- Reducing labor dependency and mitigating workforce shortages, thus lowering transportation costs and potentially giving rise to new automated fleet logistics models.
- Enhancing supply chain resilience as autonomous vehicles can adapt dynamically to traffic conditions and disruptions, reducing the impact of delays and uncertainties.
- Improving inventory management as real-time tracking and autonomous delivery facilitate just-in-time inventories, minimizing excess stock and warehouse footprints.

“With SDVs, value moves toward software platforms, OTA updates and lifecycle services, reducing dependence on traditional Tier 1 hardware suppliers and increasing reliance on software ecosystems,” noted another respondent.

“A few dominant OS, middleware and autonomy stacks will emerge, pushing suppliers to integrate into standardized platforms rather than deliver standalone components.”

There will also be new suppliers and partnerships, they added: “Big tech, AI companies and cloud providers [will] become critical Tier 0.5 partners, reshaping traditional OEM–supplier hierarchies into more collaborative, co-development models.”

AN INCREASED FOCUS ON COMPUTE AND SOFTWARE

This is likely to increase supply chain complexity and resilience needs, they said. “Advanced chips, sensors and compute platforms introduce geopolitical and capacity risks, forcing diversification, nearshoring and tighter digital supply chain visibility,” they stated.

Finally, continuous delivery and ongoing SDV service monetization will mean “supply chains evolve to support continuous software deployment, data-driven services and feature-on-demand models, extending supplier roles beyond production into in-use vehicle life cycle.”

A growing emphasis on software was a common theme among respondents.

“Technologies like SDVs and autonomy will fundamentally reshape automotive supply chains by 2030, shifting them away from traditional, hardware-centric tiered models toward more integrated, software and compute driven ecosystems,” one expert said.

“The value in the vehicle is increasingly concentrated in high-performance computing, semiconductors and software platforms, which is forcing OEMs to build more direct relationships with technology providers while compressing the role of traditional Tier 1 suppliers.”

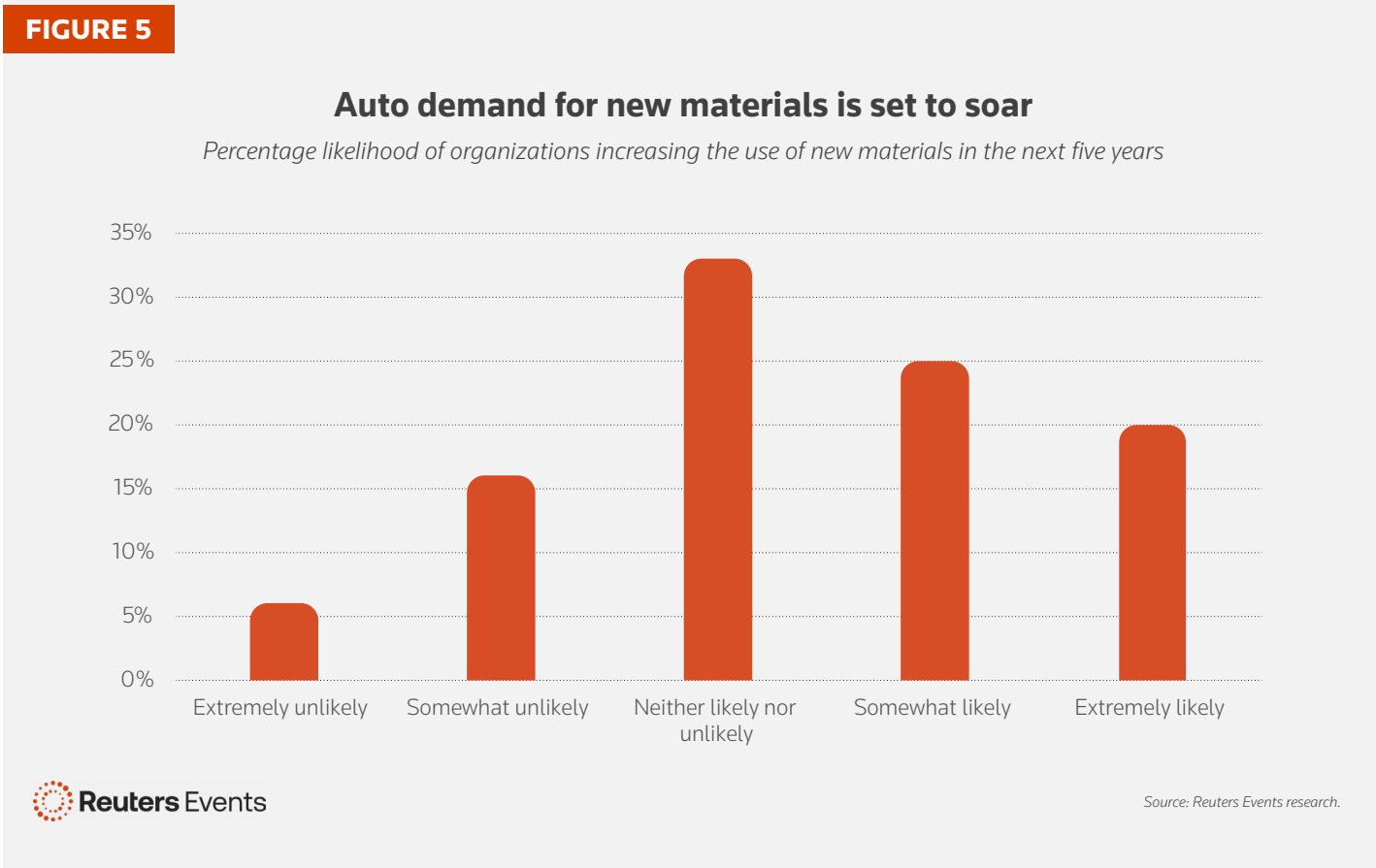
At the same time, they said, “Centralized vehicle architectures and over-the-air update capabilities are reducing component complexity but increasing dependency on a smaller set of highly strategic suppliers.”

“Big tech, AI companies and cloud providers [will] become critical Tier 0.5 partners, reshaping traditional OEM–supplier hierarchies into more collaborative, co-development models.”

NEW MATERIALS AND COMPOSITES FOR CARS

Tomorrow’s automotive industry supply chains will not only be built around new components — 45% of survey respondents are either somewhat or extremely likely to see increased demand

for new materials, too. Only 20% said increasing use of new materials was extremely unlikely.

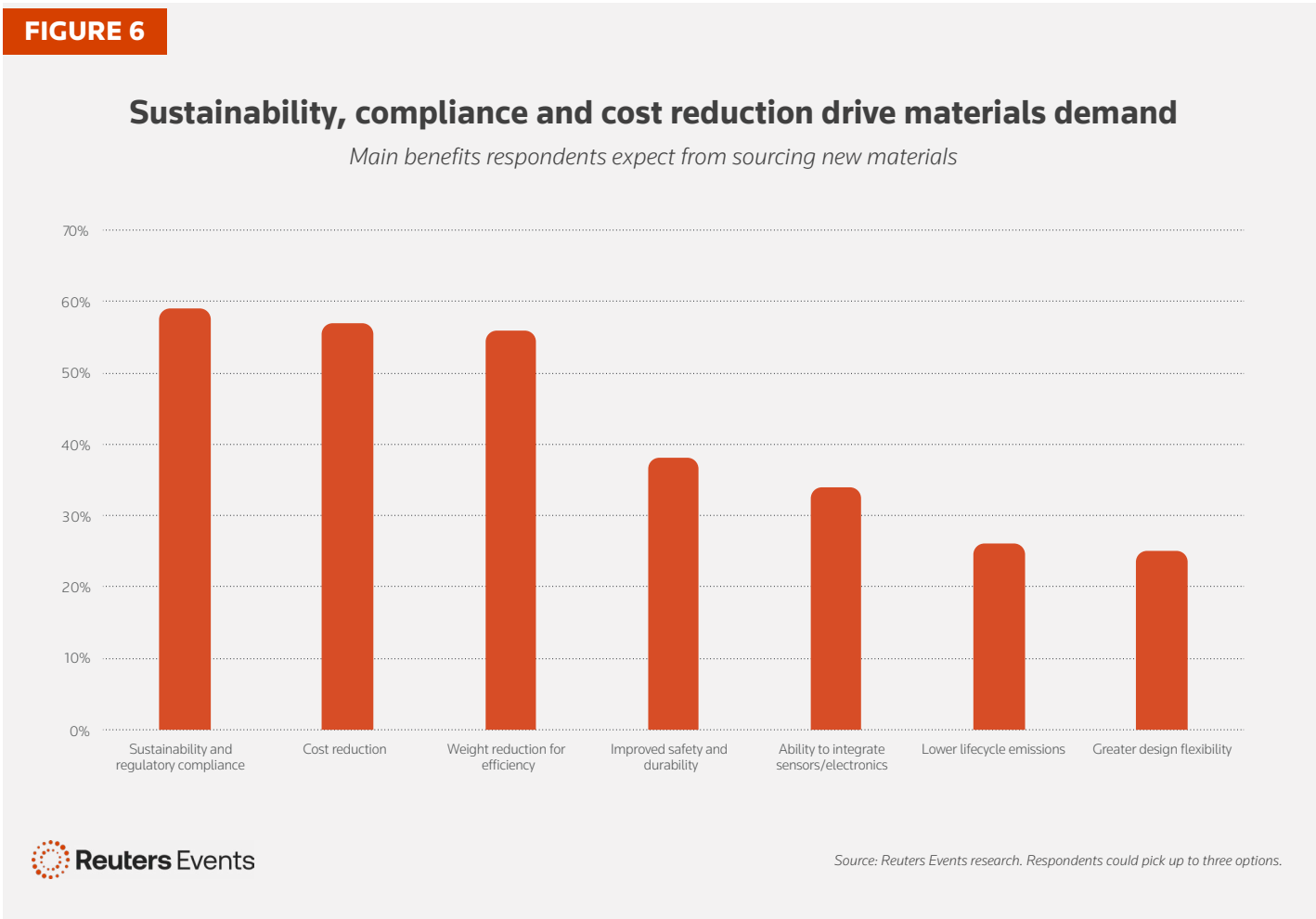


The auto sector will need more cobalt, graphite, lithium and nickel for EV batteries, but there could also be growing demand for materials such as carbon fiber reinforced polymers to reduce the weight of battery-laden EVs and advanced high-strength steels to improve crash safety standards.

The quest for new materials is being driven by three main trends: sustainability and regulatory compliance, cost

reduction, and weight reduction to improve efficiency. Improved safety and durability, plus ease of sensor and electronics integration, are further considerations.

More than half of those surveyed expect there will only be a limited number of suppliers for the new materials they need, while 47% said they expected long development and testing times and 45% anticipated high sourcing or processing costs.



Suppliers of new materials will predominantly come from Asian countries such as China, Japan and South Korea, according to 59% of those questioned.

The survey predicts potential supply chain challenges for materials in North America, which only 25% of respondents thought would offer critical sources, and Europe, the Middle East and Africa, cited by a mere 13%.

A concentration of materials supplies in Asia is already evident in the EV battery industry. According to the International Energy Agency, “China processes over 70% of lithium, cobalt, graphite and rare earths.

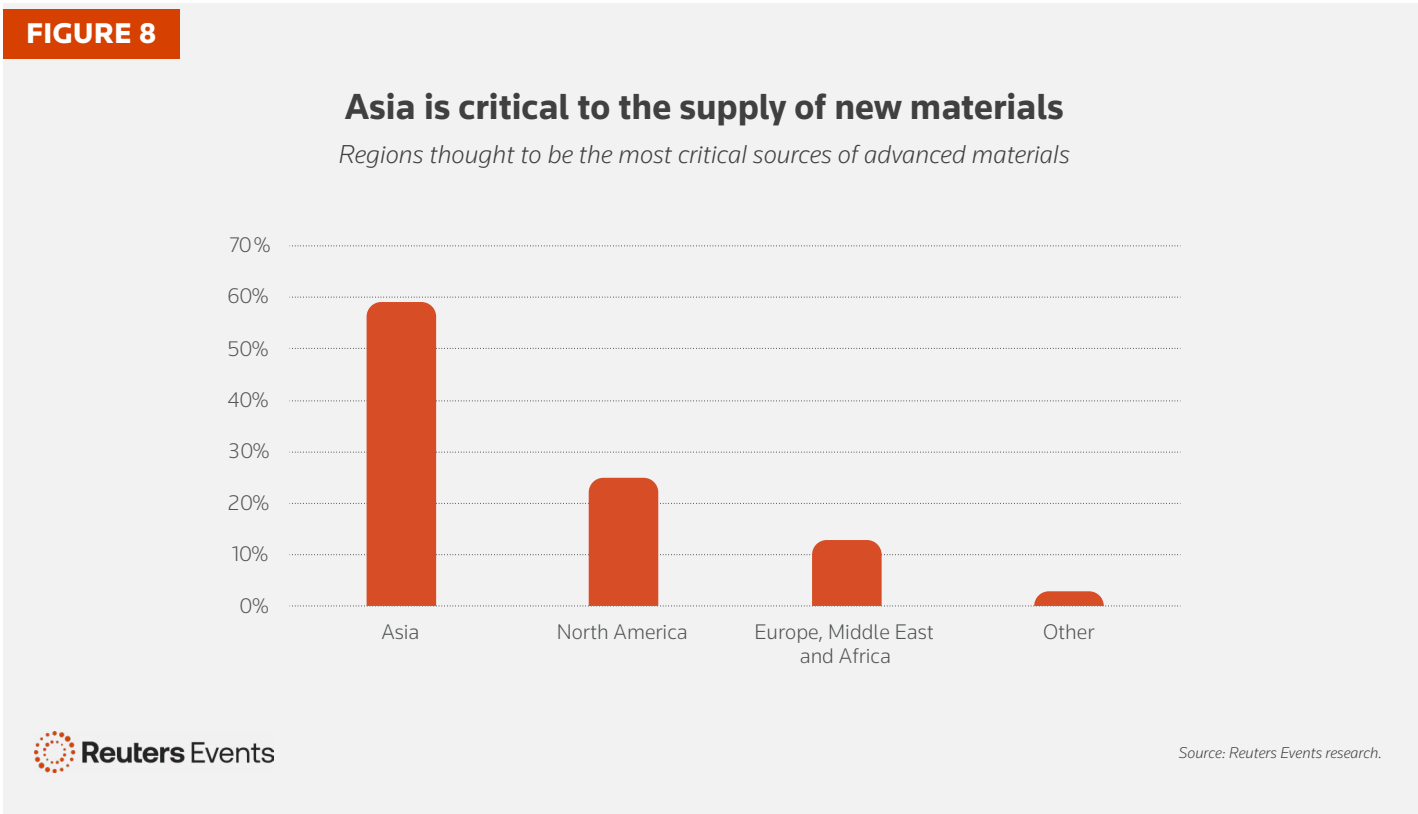
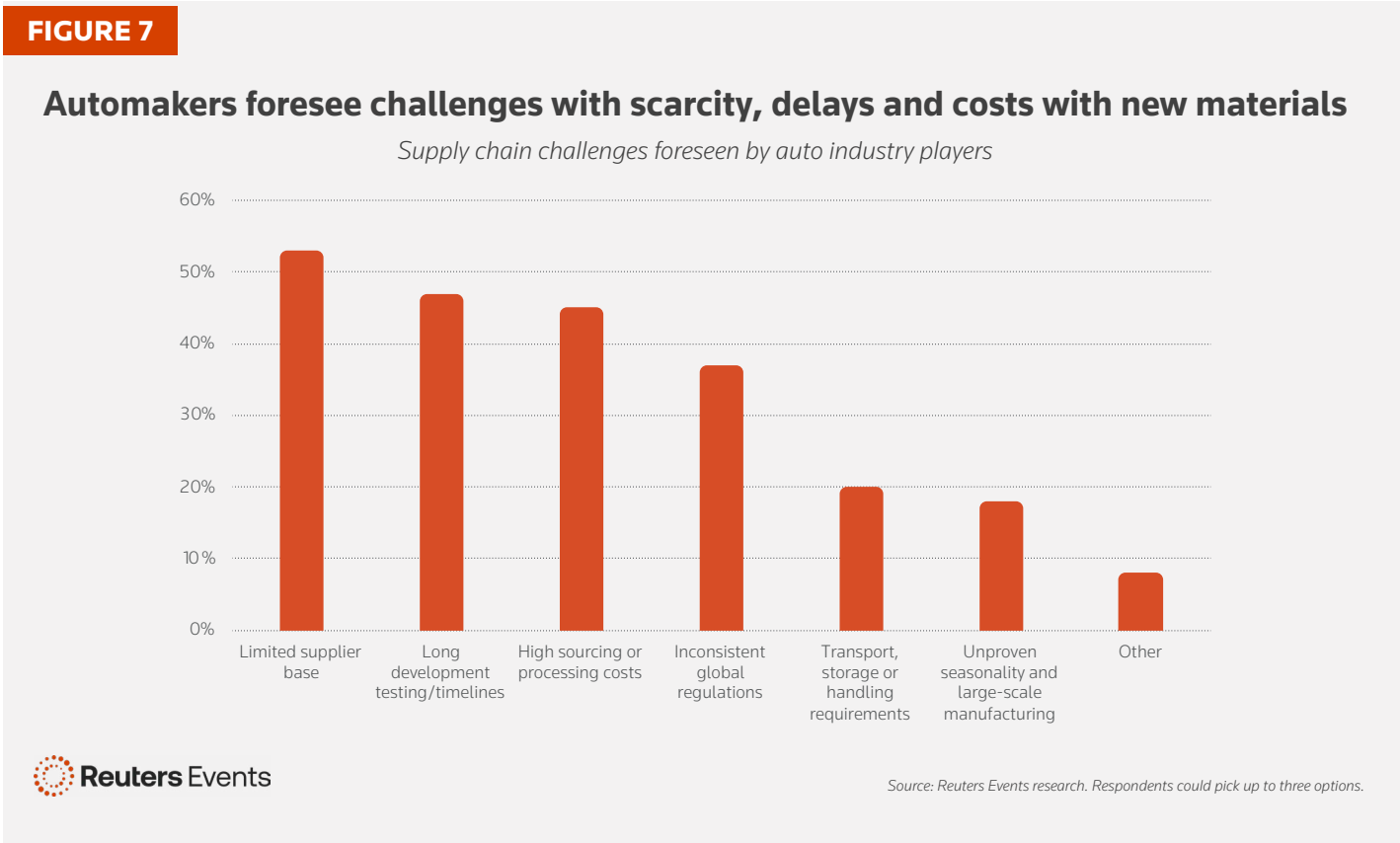
“Similarly, in mining, two-thirds of cobalt comes from the Democratic Republic of Congo, and 85% of natural graphite

from China. This heightens exposure to risks of disruption.”⁴

Research respondents highlighted a range of barriers to scaling the use of new materials in automotive manufacturing, including price and affordability, validation and certification, a limited supplier base and shortage of supply, long-term durability and performance testing.

“The single biggest barrier to scaling new materials in automotive manufacturing is ensuring reliability and safety through rigorous testing and certification,” said one industry source.

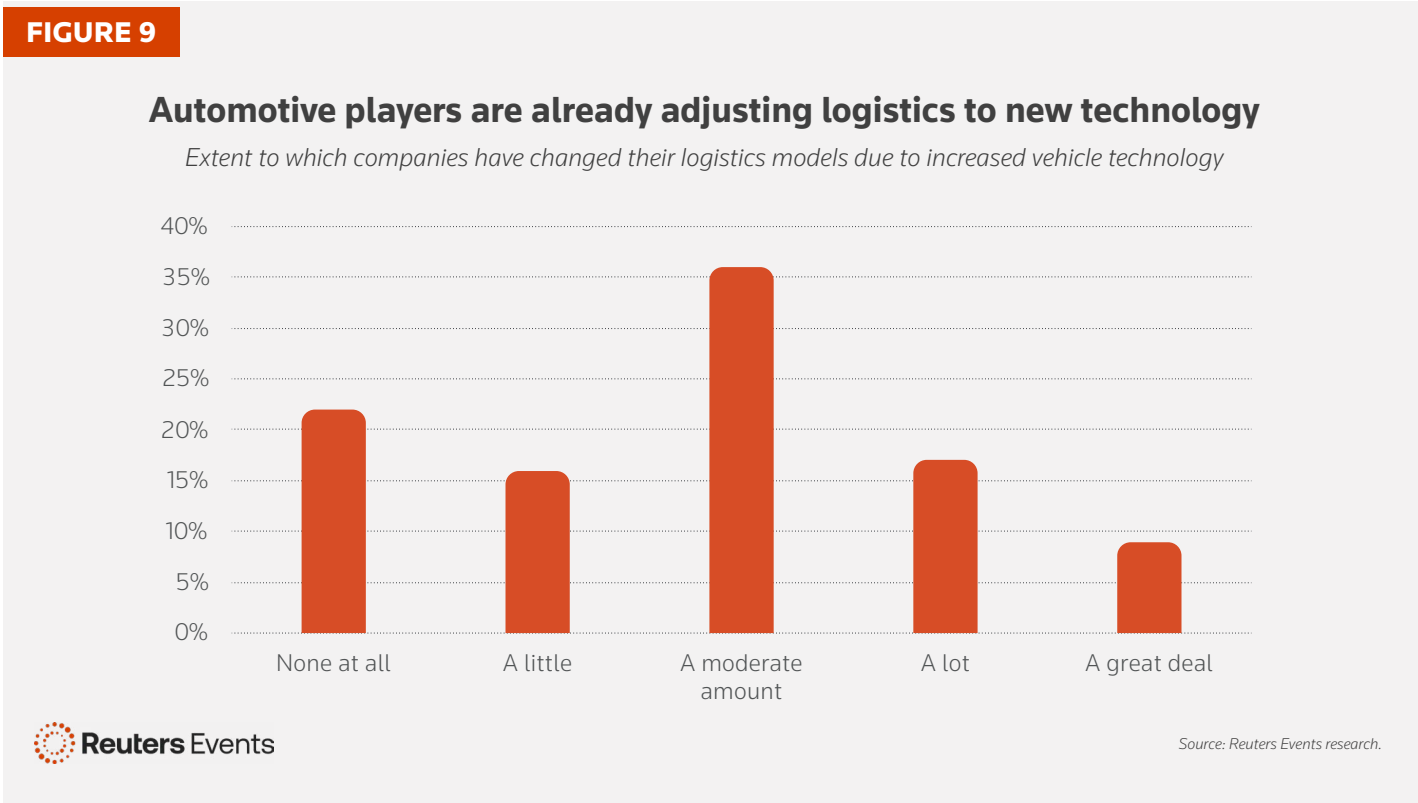
“New materials must undergo extensive validation to meet stringent safety, durability, and performance standards set by regulatory agencies and industry OEMs.”



CARMAKERS SEEK GLOBAL SOURCING AND RESILIENCE

Automotive sector players are already having to change their logistics models to suit EV, SDV and autonomous vehicle manufacturing – 36% by a moderate amount, but 17% by a

lot and 9% even more. Only 22% have not yet experienced any logistics model impacts.

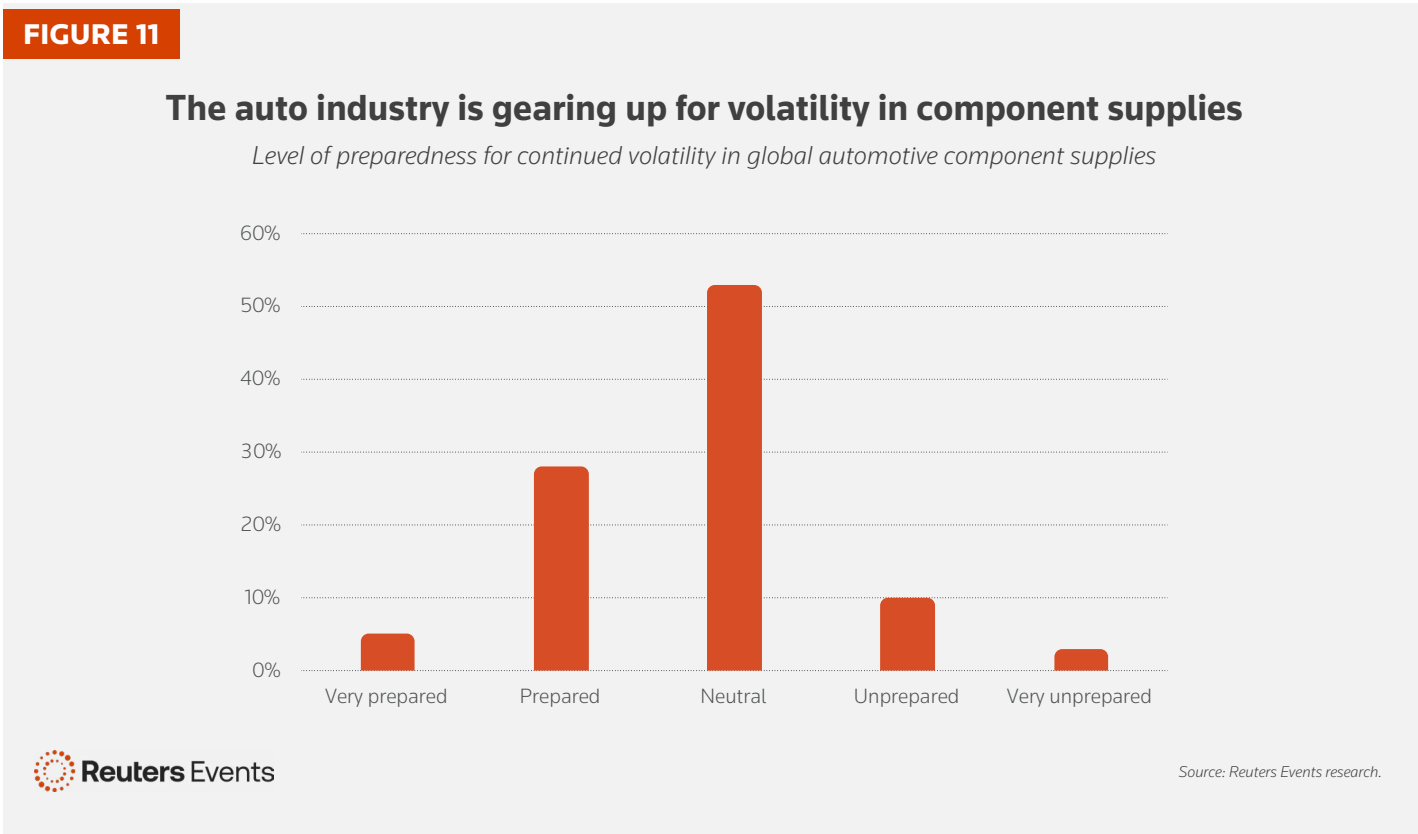
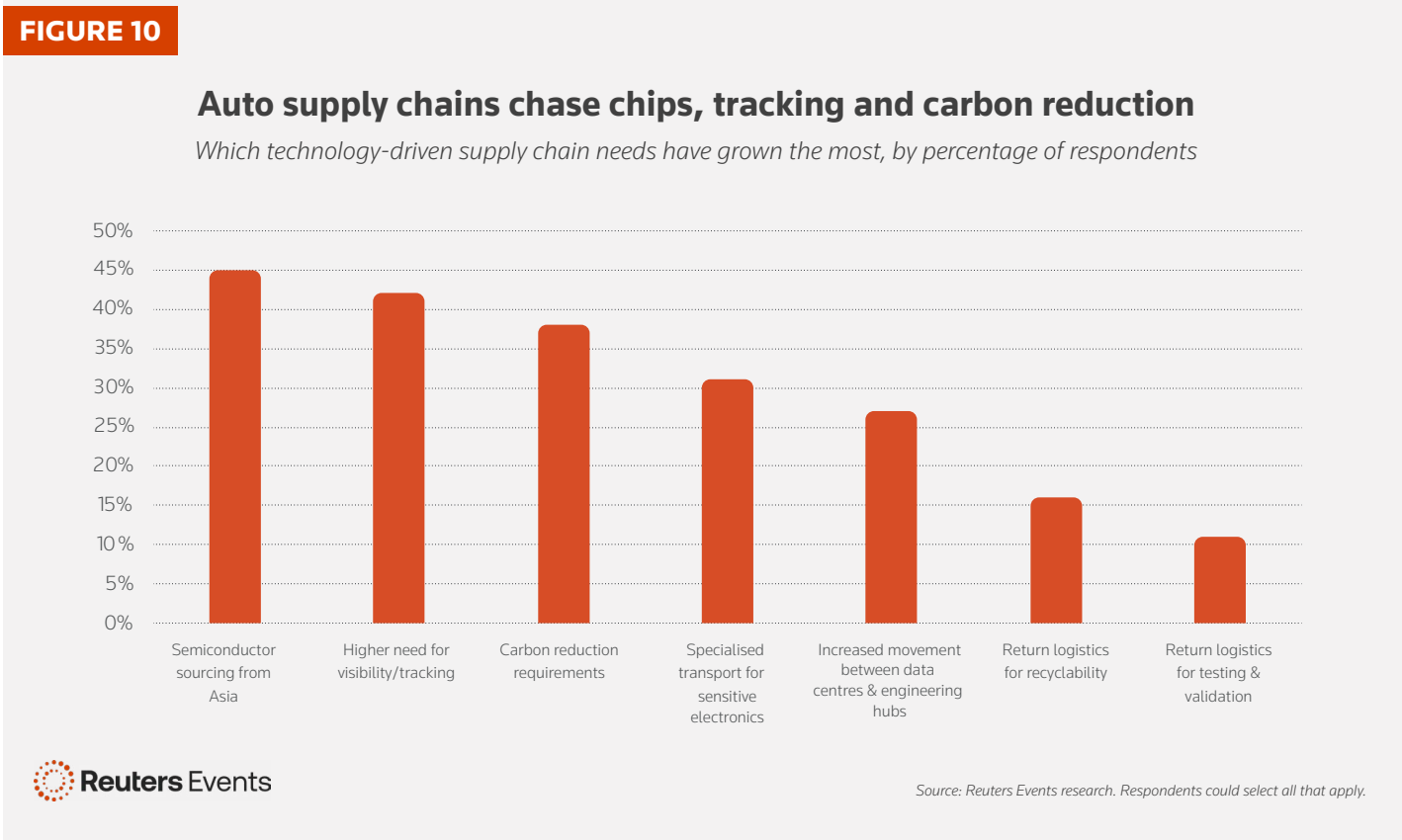


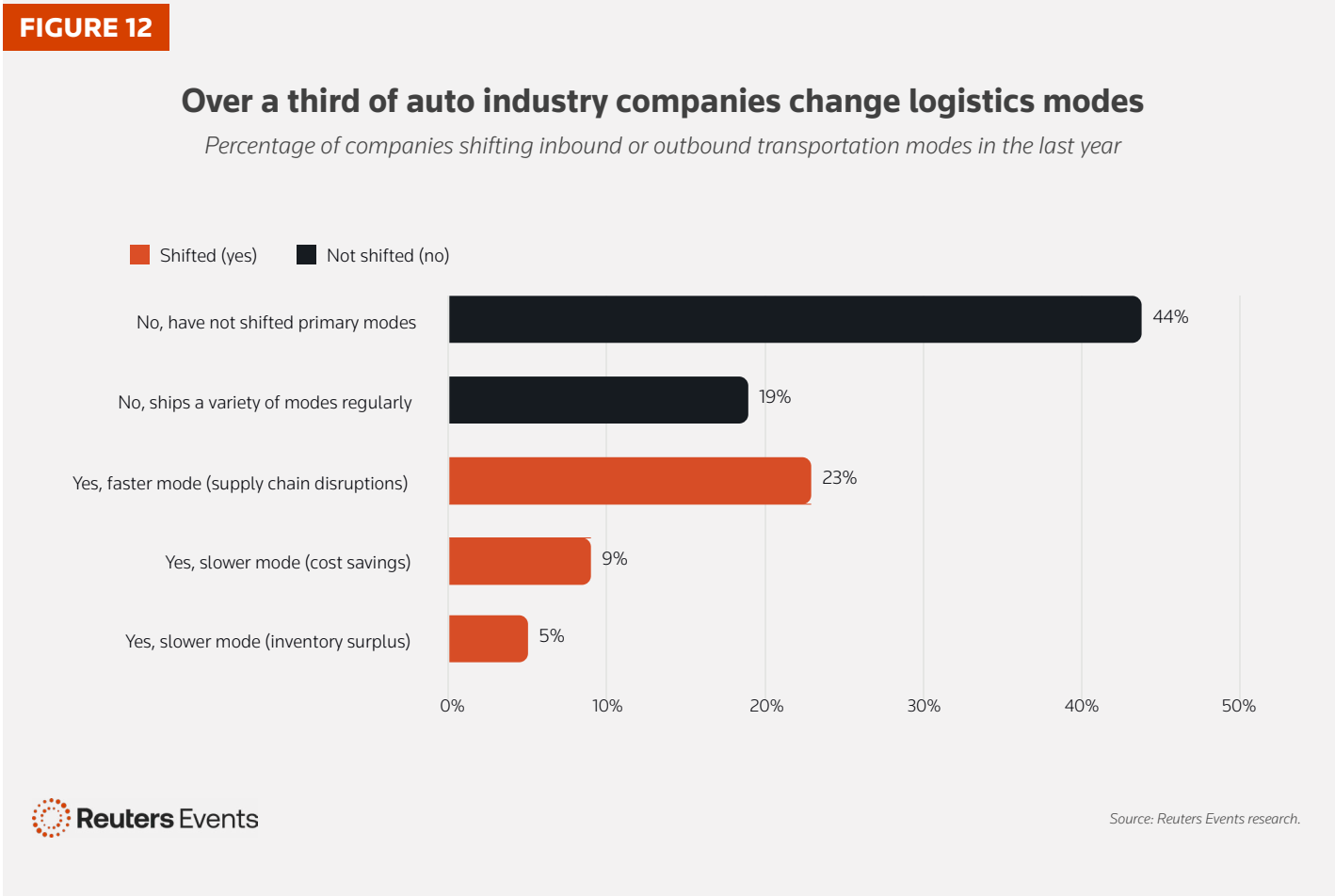
For 45% of those surveyed, the biggest supply chain change has been the need to perfect semiconductor sourcing from Asia. In addition, 42% of respondents are seeking greater visibility of supplies and 38% are looking at ways to decarbonize their supply chains.

The automotive industry is no stranger to supply chain challenges, having already suffered from semiconductor

shortages⁵ related to COVID-19⁶ this decade. Now 33% of industry sources claim to be prepared or very prepared for further volatility, compared to 13% that are not ready.

Furthermore, 37% of respondents say their companies have had to change their inbound or outbound transportation modes in the last 12 months, with 23% shifting to a faster mode to deal with supply chain disruptions.





The findings suggest the automotive sector has made headway in adapting to a changing supply chain landscape yet still may have some way to go. Many of the trends affecting automotive supply chains today are only just getting underway.

Although global EV registrations are on the up, rising 3% in May,⁷ U.S. consumers still lean towards internal combustion engine vehicles instead of EVs, according to a 2026 global automotive consumer study from consulting firm Deloitte.

The firm’s research found 61% of U.S. car owners would pick a petrol or diesel engine model as their next vehicle, compared to 21% selecting a hybrid electric and 7% opting for a battery EV.

Deloitte’s research also shows that only 49% of German

consumers are still wedded to internal combustion engine cars, while 16% would now choose a battery EV. In China, the rates are 41% for petrol and diesel versus 20% for battery EVs and 19% for plug-in electrics.⁸

Similarly, Deloitte found wide discrepancies in views on the usefulness of SDVs, ranging from 81% acceptance in India to 33% in Germany and Japan.

“The perceived usefulness of software-defined vehicles is highest in developing economies, such as India, Southeast Asia and China, while enthusiasm is notably lower in mature markets, including the United States, the United Kingdom, Japan and Germany,” said Deloitte.⁹

LOGISTICS PROVIDERS EVOLVING ALONGSIDE SUPPLY CHAINS

FedEx's Puri says the logistics sector is working to help automotive companies deal with supply chain complexities that this evolving picture presents.

"At FedEx, our most significant contribution to improving the automotive supply chain is our ability to stay ahead of the curve and act as a strategic advisor," he says.

"Keeping up with rapid technological trends and the constant evolution of the supply chain isn't just a future goal, it is something we are actively doing today."

FedEx is entering a new phase as an integrated, intelligent network, he says. "As part of this evolution, we are heavily

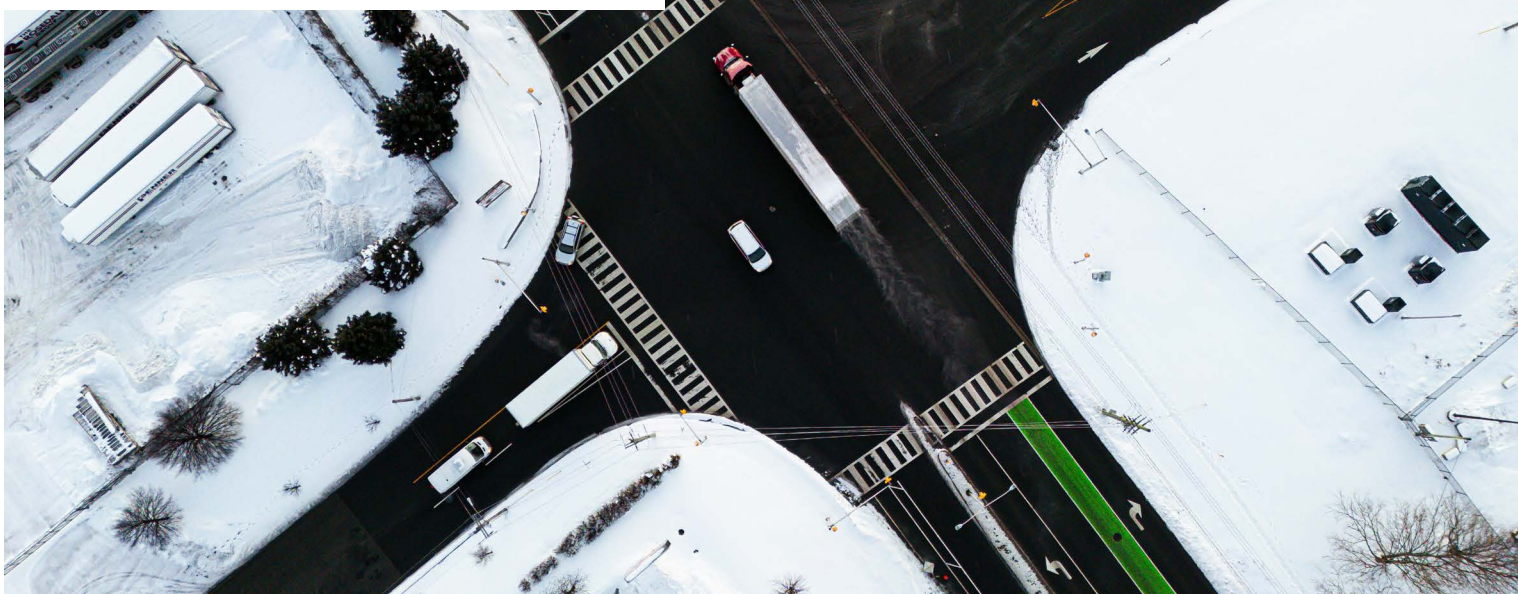
focused on strengthening our industrial network and driving growth in premium B2B verticals like automotive," Puri says.

"By deeply understanding macro shifts, we are uniquely positioned to support big auto manufacturers as they navigate these changes."

FedEx is "executing with greater precision" on areas such as adapting to an influx of new tech suppliers, securely managing high-value components or leveraging data and AI for proactive routing, he says.

"We are taking what we've built over decades and making it work smarter, providing the agility and global expertise required to turn industry transformation into a competitive advantage for our customers."

"Keeping up with rapid technological trends and the constant evolution of the supply chain isn't just a future goal, it is something we are actively doing today."



CHANGING PATTERNS OF SUPPLY CHAIN INVESTMENT

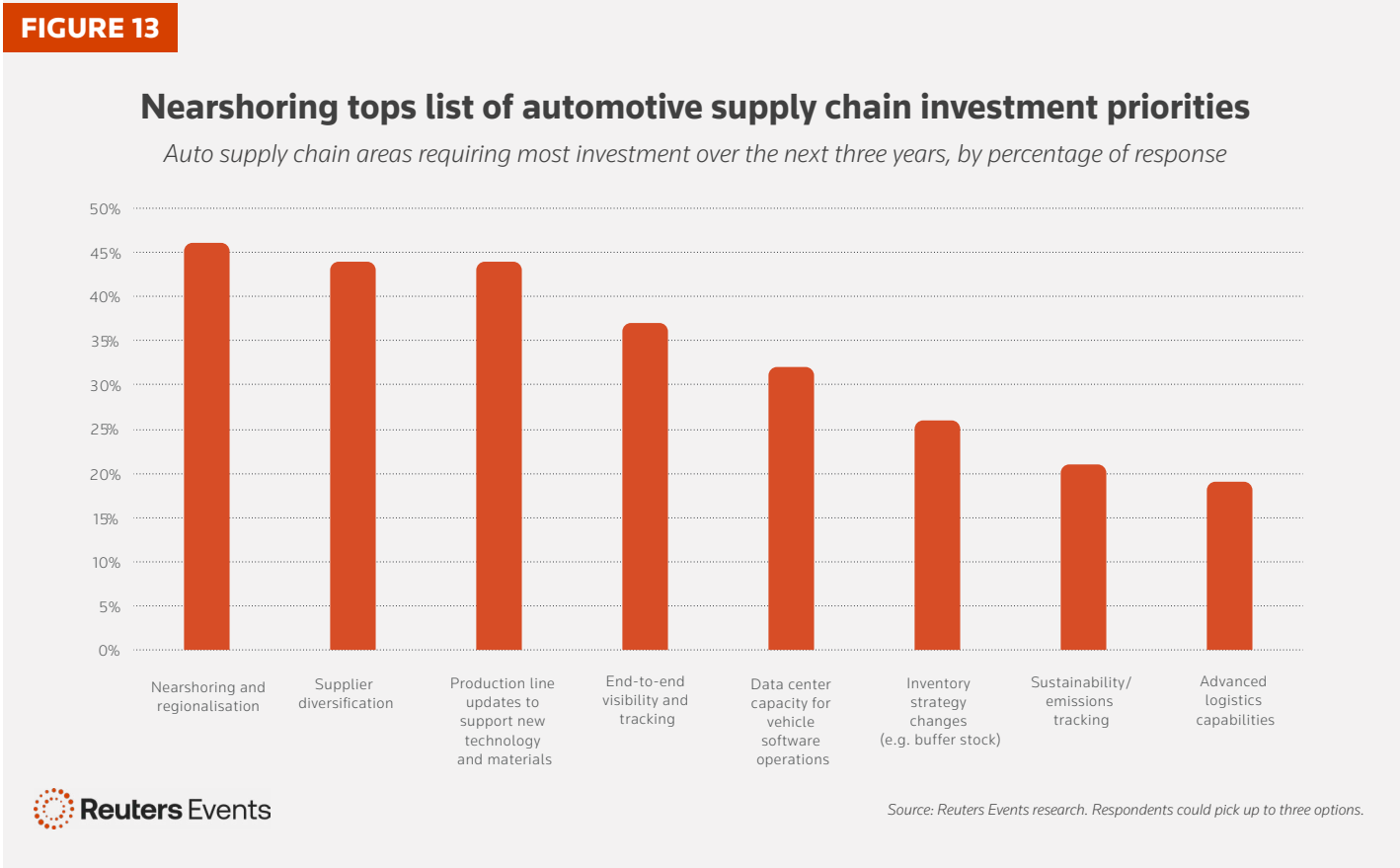
With automotive manufacturers looking to develop a raft of EVs, SDVs and autonomous vehicles, the outlook for many suppliers looks bright. Automotive content demand could grow 3.5% a year up to 2035, according to Boston Consulting Group’s 2026 Global Automotive Supplier Study.

But this growth is “masking a profound reallocation of value beneath the surface,” says the study,¹⁰ with:

- Complex electrical and electronic, autonomous driving and advanced driver assistance system components seeing high single to double-digit annual growth. Non-ADAS vehicle software is expected to grow by 14% to 16% a year “well into the 2030s,” BCG says.

- Battery and EV power train component sales growing around 13% a year while demand for internal combustion engine components declines by a compound annual 3% up to 2030 and falls to 8% by 2035.
- Interior, body, chassis and standard electrical and electronic components tracking low single-digit rates of global vehicle production.

These shifts are creating new supply chain investment priorities for the automotive industry. In the Reuters Events survey, 46% of respondents said their main investment focus over the next three years would be nearshoring or regionalization, while 44% cited supplier diversification.



These moves are likely in response to the threat posed by limited supply options for EV batteries, semiconductors and other components essential for future automotive models.

Similarly, 37% of respondents said they were prioritizing investment in end-to-end supply chain visibility and tracking capabilities, and 26% were focusing on inventory strategy changes.

Separately, investment is also going into the infrastructure required for smarter, greener vehicle designs, with 44% of the sample spending most on production line updates to support new technologies and materials, and 32% investing in data center capacity for vehicle software.

Only 19% of companies in the survey are making advanced logistics capabilities a priority for investment, pointing to a growing need for freight industry support.

Respondents cited a range of capabilities as being valued in logistics partners as automotive supply chains become more technology driven.

These included longstanding asks such as offering flexibility, reliability, affordability and speed, along with proper tracking and packaging, low-carbon fleets, secure and compliant handling of high-tech components and the ability to carry new materials or easily manage cross-border shipments.

According to one expert, newer capabilities should also include:

- Advanced analytics and integration, to seamlessly integrate data with auto company logistics management platforms, allowing for predictive analytics, proactive issue resolution and continuous optimization.

- Real-time data sharing and visibility, enabling automotive manufacturing players to monitor shipments, inventory levels and supply chain performance in real time and optimize decision-making.
- Flexible and scalable logistics options that can accommodate the dynamic needs of a tech-driven supply chain, including automation and just-in-time deliveries.
- Automation and digital collaboration tools to improve efficiency, reduce errors and facilitate rapid response to supply chain disruptions.

According to Puri at FedEx, AI could play a large part in helping logistics companies meet the demands of future automotive manufacturing supply chains. "We've always known that AI is crucial to how we transform our operations for what's next," he says.

Over the next three to five years, "AI will have the greatest impact by far" on automotive manufacturing supply chains, he says. "If used correctly, its potential is unmatched simply because of the incredibly broad use cases it supports.

"AI doesn't just solve one specific issue — it is a dynamic capability that can be deployed in many different fashions to help us tackle multiple problems across the entire automotive supply chain.

"However, to leverage AI effectively, you need massive amounts of data — and that is exactly where the unmatched global scale of FedEx comes into play."

"Only 19% of companies in the survey are making advanced logistics capabilities a priority for investment, pointing to a growing need for freight industry support."

THE LOGISTICS KEY TO AUTOMOTIVE’S FUTURE

The FedEx/Reuters Events research paints a picture of a supply chain in flux, already altered by events such as COVID-19 and continuing to pivot in the face of the inexorable rise of EVs, SDVs and autonomous vehicles.

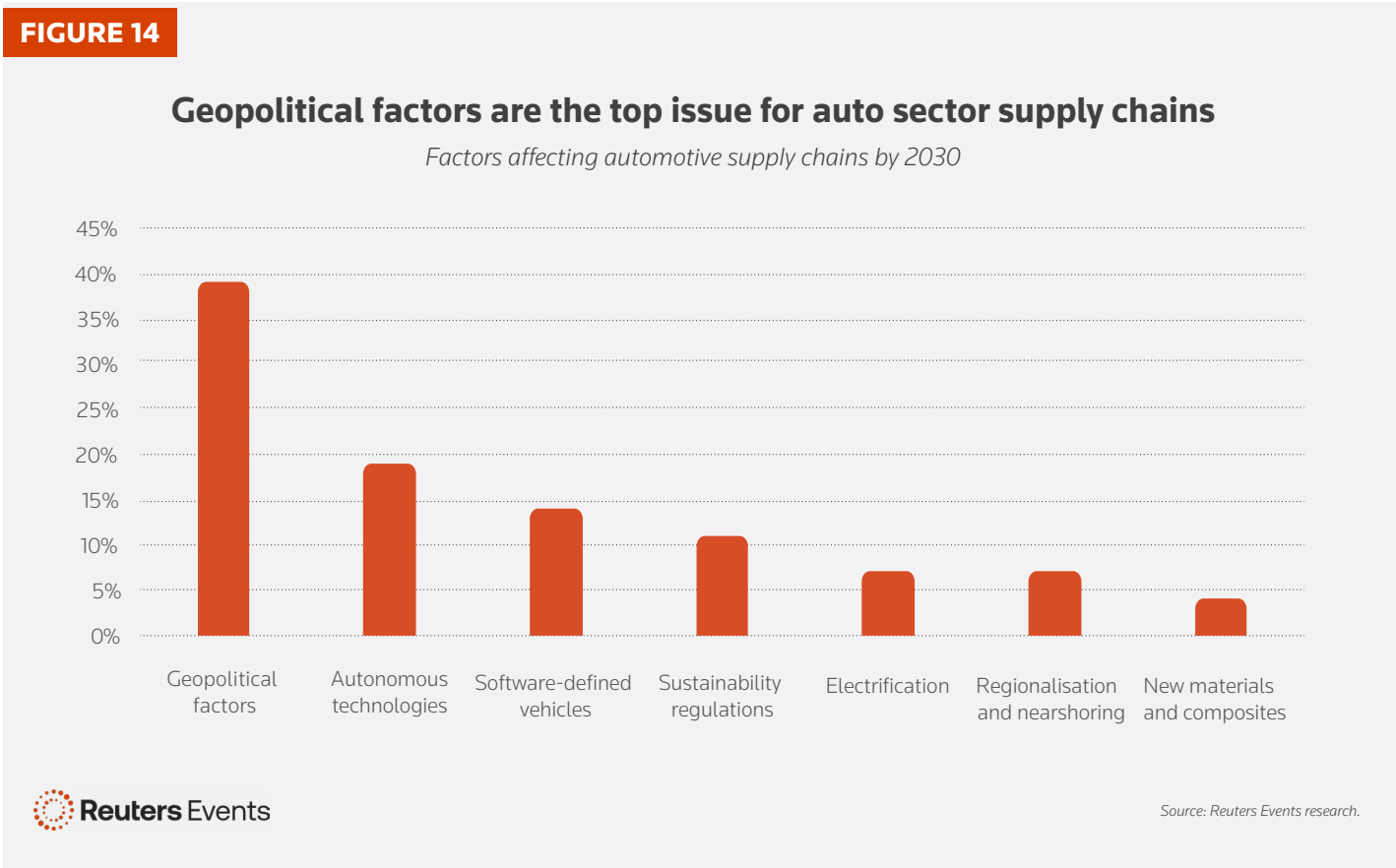
The supply chain impact of these market developments cannot be overstated, with 88% of respondents rating the effects of SDVs alone as moderately to extremely significant.

Tomorrow’s vehicles will need new supplies of chips, software and sensors, which “act as the eyes and ears of the network, gathering the real-time data needed to feed advanced analytical tools,” Puri says.

Besides these components, there is also a growing need to source new materials addressing issues such as sustainability – through vehicle electrification and material re-use, for instance – or efficiency and safety.

These sourcing requirements are expected to throw up challenges including low availability, increased testing times and high costs, particularly since the bulk of materials and components will likely come from limited sources in Asia.

Given this geographical concentration of supplies, it is perhaps unsurprising that the biggest consideration for automotive supply chain dynamics up to 2030 is not the progress of trends such as autonomous driving or sustainability, but geopolitics.



Recent events have given automakers reason to be wary. In June 2026, German premium carmaker BMW issued its third profit warning in as many years, citing weakness in the Chinese market and cost increases linked to the closure of the Strait of Hormuz.¹¹

And Polestar, a Chinese carmaker, warned it would have to stop selling vehicles in America after failing to secure Connected Vehicles Rule authorization from the U.S. Commerce Department.¹²

This volatile global trade environment poses significant risks for automakers at a time when many are struggling to adjust their supply chains, and the challenges are only likely to grow as electrification, SDV and autonomous driving trends increase.

Take electrification, the most established of the major trends affecting the automotive sector. While a quarter of new car sales globally were set to be EVs or hybrids in 2026,¹³ the total number of electrics on the road this year is still only expected to be around 116 million.¹⁴

That is less than 5% of the 1.6 billion or so vehicles in use worldwide.¹⁵ Clearly, the supply chain challenges that

automotive leaders perceive today will be amplified by orders of magnitude as the global vehicle installed base is updated to smarter, electric, more autonomous models.

While around half of the companies consulted are nearshoring or regionalizing to address such challenges, and 44% are diversifying suppliers, it is worrying that only a third can say they are prepared for continued volatility in global component supplies.

Similarly, the fact that two out of five companies are seeing a higher need for supply chain visibility and tracking is testimony to growing awareness of controlling supplies in a complex global market.

Increasingly, it seems automotive value chain actors will need to rely on the capabilities of advanced logistics partners.

The logistics sector is rising to the challenge, with FedEx, which has been recognized for excellence by General Motors,¹⁶ partnering with ServiceNow on an AI-powered supply chain platform.¹⁷ Such developments may be key to auto industry success in future.

THE RESEARCH SAMPLE

The research for this study was carried out in April 2026 among 81 global automotive sector professionals, representing software and technology providers (23%), OEMs (20%), Tier 1 suppliers (18%), consultancies (18%), Tier 2 and 3 companies (8%) and logistics players (4%).

Most of the respondents were directors (35%), senior managers (26%) and C-suite executives (19%), with 10% specialists, 6% managers and 4% others.

The size of the sample means there is a minimum 11% margin of error to the results, rising to 13% for some questions where only a limited number of respondents completed the poll.

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