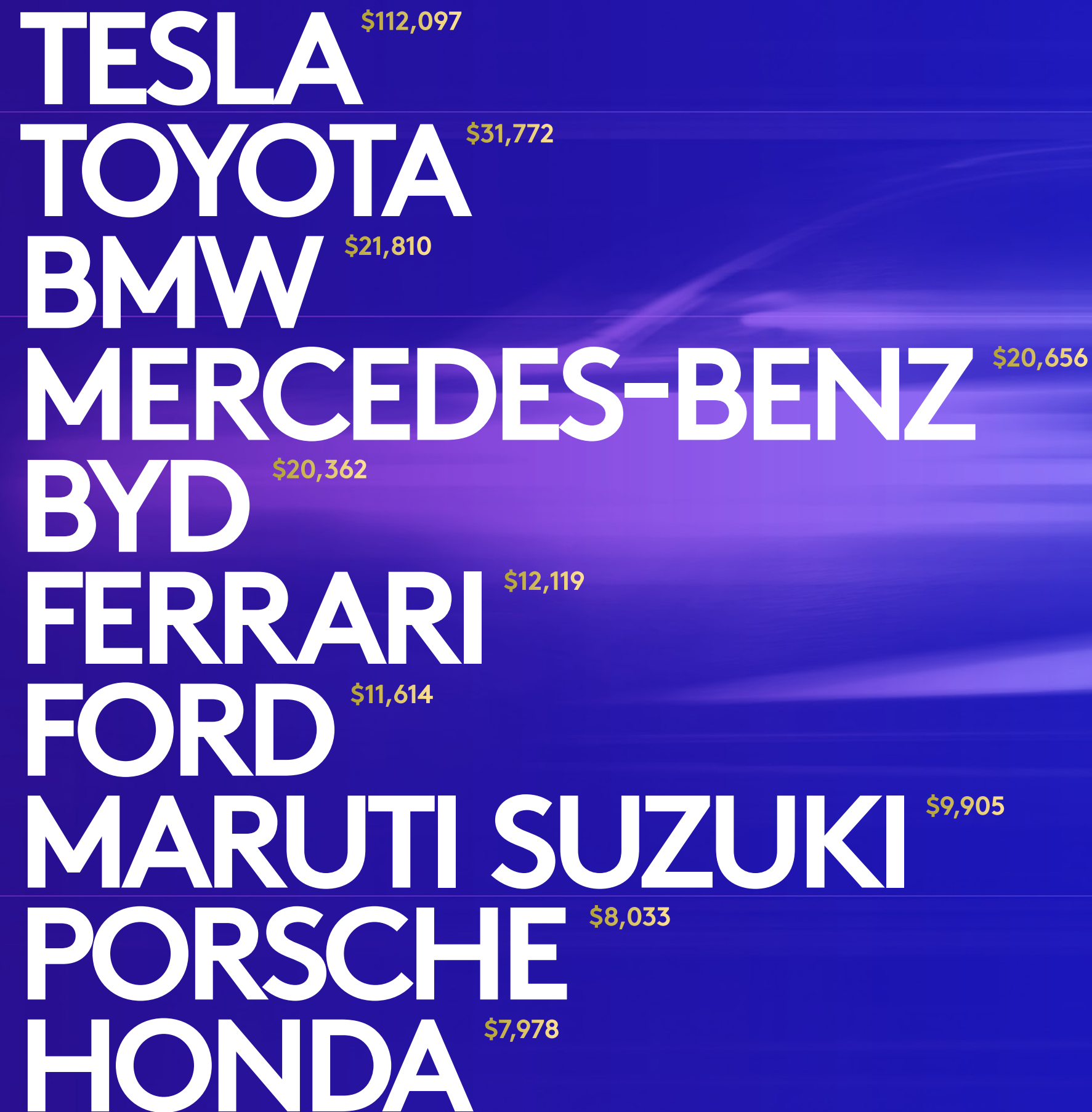


AUTOMOTIVE

AUTOMOTIVE TOP 10:

Brand Value (US\$M)



DEFINITION:

The Automotive category includes mass-market and luxury cars, trucks, motorcycles, scooters, and tyres. Each brand includes all models marketed under the brand name.

PICKING UP SPEED/ TOP AUTO BRANDS RUN AHEAD OF THE TRENDS

Category Brand Value
Year-on-Year Change

14%

Automotive Top 10
Total Brand Value

\$256,345 M

Source: Kantar/Kantar BrandZ (including data from S&P Capital IQ and Euromonitor)

AUTOMOTIVE

The Automotive category grows 14% this year.

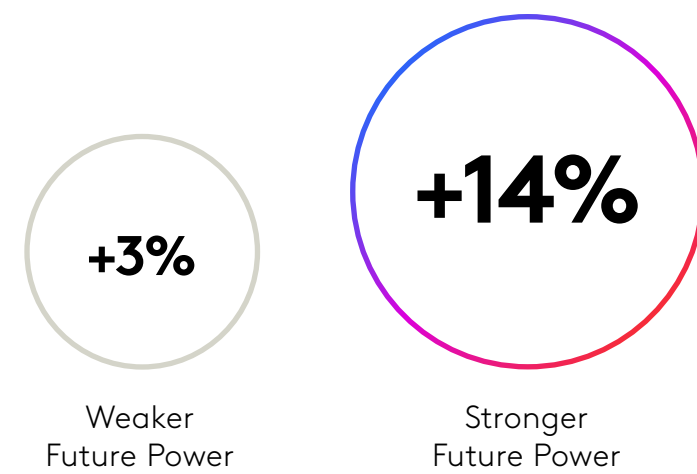
Electric vehicle sales surged in key markets like the US and China as consumers rushed to get ahead of expiring tax credits. Tariff uncertainty produced similar effects, pushing buyers to lock in lower prices in advance of threatened hikes.

These are major market drivers, though they are not necessarily repeatable – nor controllable by brands themselves. What automakers can own is how attuned they are to changing consumer values. And there’s been new success in this regard.

One such shift is the evolution of cars from ‘driving machines’ to ‘mobility hubs’. A sizeable consumer base now sees autos as lifestyle environments first and foremost – and then as high-performance roadsters only secondarily, if at all.

Future Power predicts growth in Automotive Top 10

Brand Value growth 2025-2026



Source: Kantar BrandZ, Global Top 10 Automotive Brands

As such, many would-be buyers now expect predictive maintenance, intuitive interfaces, and seamless connectivity as table stakes. And they’re looking forward to the day when agentive AI butlers and autonomous-driving features become standard.

At the same time though, most buyers still prefer in-person purchase journeys. And that’s interesting, because it suggests that for top auto brands, greater digitalisation and humanisation should ideally advance in tandem.

This is why, and how, lifestyle amenities have become such crucial differentiators. There are still plenty of ‘carheads’ in the world who thrill to record-breaking performance specs. But often, buyers care more about advanced in-cabin amenities such as food and drink coolers, entertainment consoles, and signature fragrances. Chinese consumers have been at the forefront of this sea change – a shift which some western marques overlooked in their products and marketing overseas. They must now revamp their China strategies to regain lost Meaning.

Meanwhile, at the top end of the market, another clear trend is personalisation. Wealthy buyers in booming regions like the Middle East are willing to spend big for vehicles tailored to their exact tastes and specifications. Ferrari recognised this earliest. Now other European luxury brands have followed suit with their own takes on high-touch, one-to-one, ‘D2C’ craftsmanship.



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The new battleground for automotive growth

Customers perceive today’s automotive market as innovative but structurally unsettled. They are exposed to a rapid cadence of model launches, accelerating electrification agendas and increasingly complex technology choices. Through all this, prices remain elevated and long-term outcomes – regulation, infrastructure, residual values – remain uncertain.

Electric vehicles are widely accepted as the final destination, yet demand has recalibrated rather than declined. For many customers, EVs bundle too many unresolved variables at once: battery evolution, charging experience, depreciation risk, and fast-moving competitive benchmarks.

In this environment, hybrids have emerged as a psychologically coherent bridge. They allow customers to express progress and environmental intent without committing prematurely to a single technological future. To select combinations that preserve desire while remaining credible in a volatile market. Traditional OEMs talk boldly about innovation while delivering it incrementally and cautiously. Chinese brands, by contrast and even in markets where their penetration is low, redefine brand by shifting trust from heritage and narrative to visible product experience, digital sophistication, and value density. Customers are not choosing between brand or product as they used to; they are selecting combinations that preserve desire while remaining credible in a volatile market.

AUTOMOTIVE



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Beyond the showroom – the emergence of vehicles that feel alive

The automotive industry is shifting from hardware-focused manufacturing to Software Defined Vehicles (SDVs), making car upgrades through over-the-air updates. This change transforms the whole business model into an ongoing brand-customer relationship, with OEM's remotely fixing services, offering features on demand, and using real-time data for maintenance.

Separating software from hardware lets vehicles stay technologically relevant & Meaningfully Different for longer, boosting both lifecycle and sustainability.

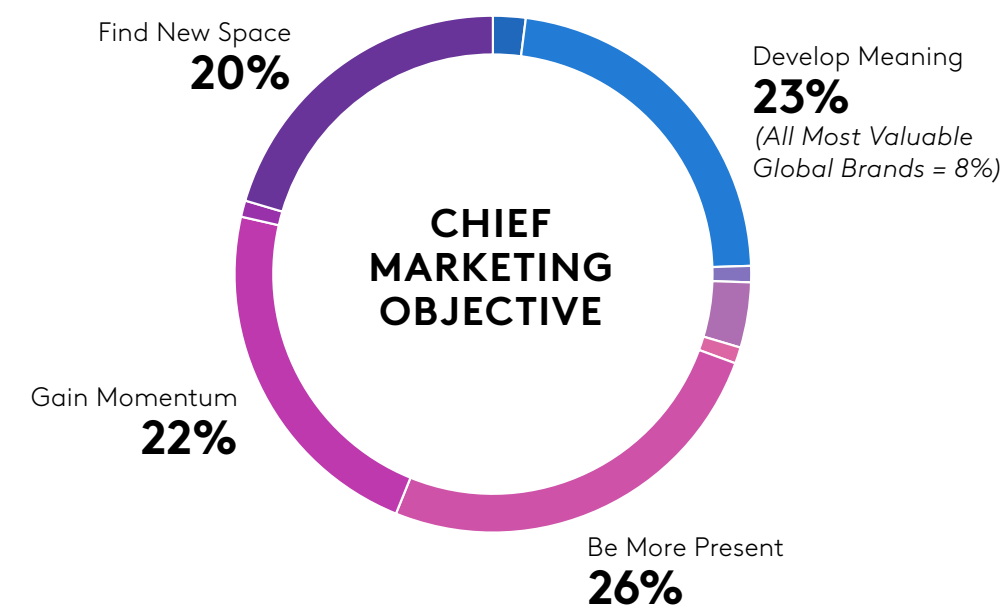
Tesla leads by monetising software upgrades well after sale, while Chinese brands have taken this up a notch, using SDV architecture and AI to deliver adaptable tech even in its budget models. Legacy automakers such as Mercedes-Benz and BMW are adopting centralised tech structure to keep their cars up to date. As the industry enters an 'AI war', the competitive battlefield has moved from the engine bay to the operating system. Going forward, the automotive revolution will be defined by one simple metric: a car that doesn't update is a car that's stuck in the past.

The CES 2026 event recently reinforced the industry's shift toward SDVs, a key focus of automotive OEMs today.

This evolution will ultimately offer manufacturers a 'tech multiple' in stock market valuations, shifting the perception of automotive brands from legacy manufacturers to high-growth tech entities.



% of Automotive Top 10 within each objective



Source: Kantar BrandZ, Global Top 10 Automotive Brands; Most Valuable Global Brands 2026

At the other end of the pricing spectrum, Chinese marques have become tech-forward, high-volume disruptors in the budget auto segment. This certainly true in China's domestic market where, if anything, price competition remains too intense. But it's also plenty evident abroad. Low-cost Chinese EV models attract the most media attention. But don't overlook more traditional players like Chery, which leads China's vehicle exports with affordable combustion models.

Price alone cannot explain these brands' success abroad; positioning matters, too. Innovative new factories have allowed Chinese marques to localise for overseas markets without sacrificing efficiency. One striking example here is BYD's Racco minicar, specifically designed and tailored to compete in a single market – Japan. Could this approach become the new gold standard for export cars?

It's a question that the big US brands must confront as they defend their share in diverse regions like Europe (for Ford) and South America (for General Motors). At home, these brands still have some breathing room thanks to tariffs and other rules that have thus far barred the Chinese marques. But abroad, they'll have to fight.

Many US executives also now lament that their industry moved too quickly toward full electrification, at the expense of more transitional models. Toyota embodies the alternate path here. By leaning into plug-in hybrids, Toyota successfully met consumers 'where they are'. Looking ahead, Toyota has a similarly differentiated approach to next-gen energy sources, investing in both solid-state batteries and hydrogen power.

And then there's Tesla, which remains the category's clear number one. The Texas-headquartered brand has recently grown more controversial in its home market (though the Americans who do like Tesla still *really like Tesla*). Abroad, the brand's reputation has proved more resilient. That includes in China, where Tesla is still unusually competitive for a foreign EV player – as well as in newly entered markets like India, where the brand carries considerable cachet as a heretofore unavailable luxury marque (and also, it must be said, as a synecdoche for CEO Elon Musk).

What Tesla and the Chinese brands share is a gift for stoking momentum, or Future Power. Their executives use social media in more exciting, emotional ways than their competitor. What's more, greater digital fluency tends to go hand in hand with better signal intelligence. The more executives are plugged in to online consumer sentiment, the better they'll be able to respond to any momentum dips before they impact sales.

Across regions, BrandZ data shows automotive brands tend to have built Difference perceptions but have a clear opportunity to build stronger Meaningful connections. This means keeping up with evolving needs and building cultural relevance.

AUTOMOTIVE

BRAND SPOTLIGHT

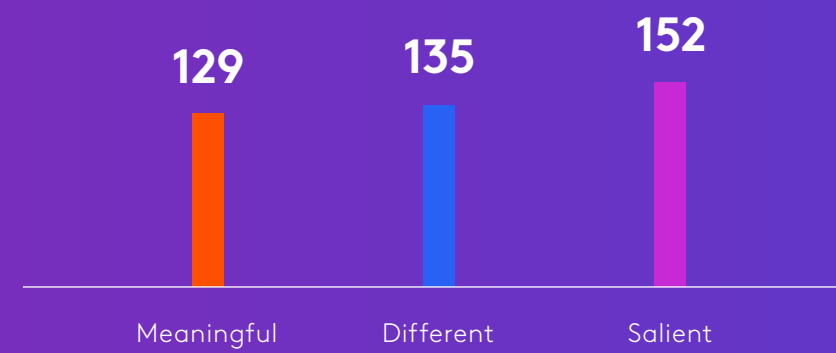


2026 BRAND VALUE

\$20,362 M

+41% vs 2025

Global brand equity



Source: Kantar BrandZ, Most Valuable Global Brands, global data, 2026

Addressing its Chief Marketing Objectives

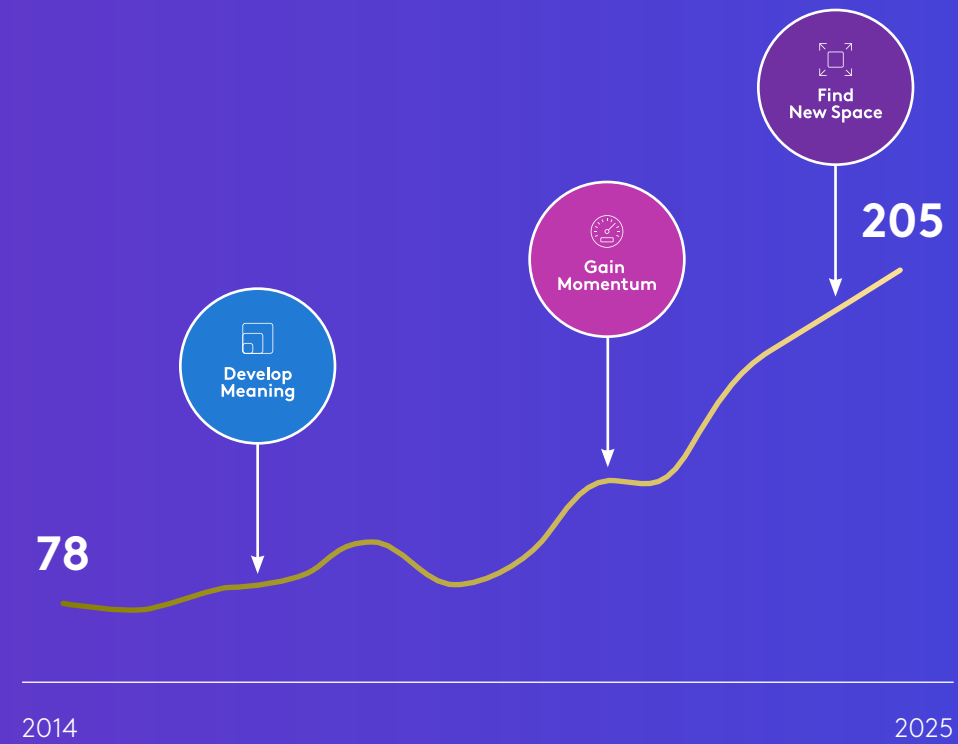
BYD has elevated consumer perceptions in China through its leadership in new energy vehicles, offering strong technology innovation at affordable prices.

Now, after building strong relevance and Salience in its home market, BYD is working to find new space overseas. It seems to have a winning formula: with exports surpassing 900,000 vehicles in 2025 and expansion across 110+ countries, BYD is rapidly accelerating its global presence. The hope is that its momentum gains abroad will translate into the same kind of Demand Power boost that the brand has seen in China.

Average Future Power across 9 overseas markets



Demand Power – China



Source: Kantar BrandZ, Chinese Mainland, Cars, 2014-2025

BRAND SPOTLIGHT

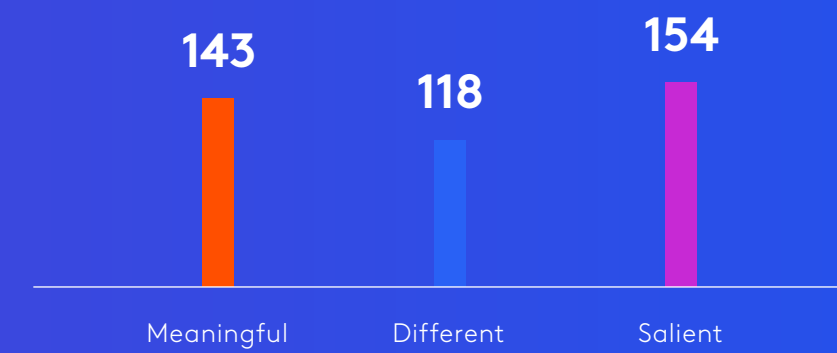


2026 BRAND VALUE

\$31,772 M

+8% vs 2025

Global brand equity



Toyota, US Cars



How Toyota has built Meaning

Toyota's Meaningful connections are built on trust and social currency. Toyota is the most Meaningful Automotive brand in the US, its biggest market. It is known by customers for its strong product range, purposeful messaging around safety, and reliable expertise. Toyota has also benefitted from its status as a day-one leader and champion of hybrid vehicle formats. All of these attributes have built durable social currency for Toyota, and have ladder up to a deep sense of trust.

At the same time, Toyota has strengthened its cultural relevance by positioning itself at the intersection of community impact and youth development. Its partnership with the NFL FLAG youth football league engages local communities across the US, while also generating wider visibility and buzz through NFL broadcast moments that highlight the programme.

Brand Strengths:

GOOD RANGE

MAKES LIVES BETTER

BEST AT WHAT THEY DO

Source: Kantar BrandZ, USA, Cars, 2025

AUTOMOTIVE

BRANDS TO WATCH



Despite only beginning EV production in 2024, consumer tech giant **Xiaomi** has emerged as a major automotive contender. In addition to its pre-existing advantages in vertical integration, hardware R&D, and supply chain scale, Xiaomi's foray into cars has benefitted from the profile of its popular CEO, Lei Jun, who is a major social media star and live streamer in China.



Spanish brand **CUPRA** is building strong momentum in Germany, which is its biggest market (and the home of its parent company Volkswagen). CUPRA's focus on providing a more high-performance EV driving experience helps it to stand out from the pack, while its model mix aligns smartly with local preferences. It's perceived to be a brand with strong design and a distinctive identity.



Source: Kantar BrandZ, China, Cars, 2025



Source: Kantar BrandZ, Germany, Cars, 2025



IMPLICATIONS

01

FIND THE RIGHT SIGNAL INTELLIGENCE

In a fast-moving sector such as automotive, shifts in brand momentum can clue you into future sales trends – while also indicating where marketing has the best chance at spurring growth. Prioritise marketing investments that deepen consumer connections (rather than simply extending reach).

02

STRENGTHEN YOUR ROLE IN PEOPLE'S LIVES

Meaningful associations drive demand and support higher pricing. Today, automotive brands score well on Difference (often through advanced tech capabilities) but lag behind in meeting people's needs. This gap limits growth. The remedy? Invest in deeper emotional connections to build trust and cultural relevance.