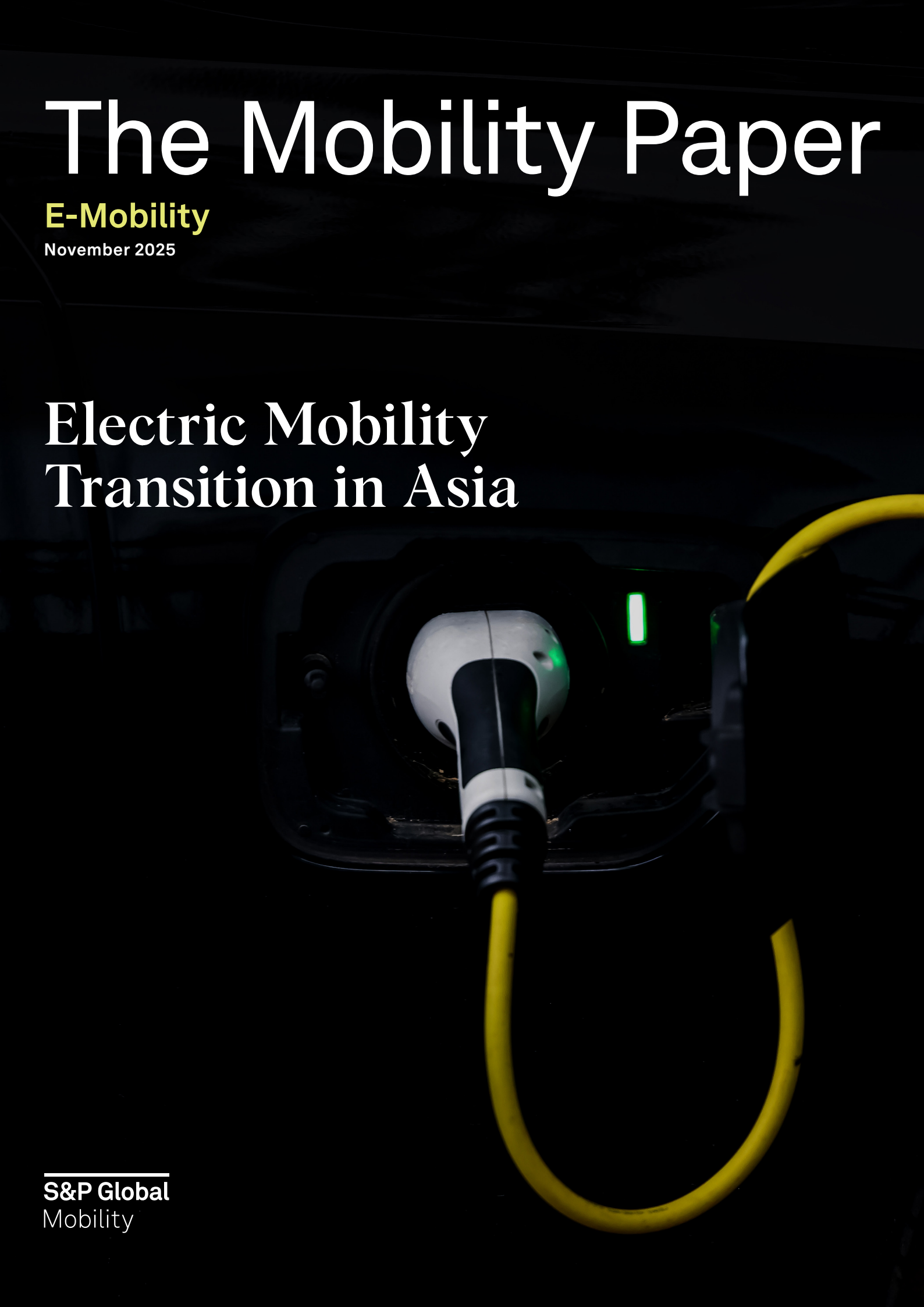
The Mobility Paper

E-Mobility

November 2025

Electric Mobility Transition in Asia



S&P Global
Mobility

Executive Summary

Electric vehicles (EVs) have been on a growth path, climbing in global sales and consumer demand. Asia is expected to lead the pack, with Southeast Asian marked as the likely hub for battery and parts manufacturing. South Korea is also reaping benefits from the market growth, while Mainland China's market players are anticipated to see strong export numbers soon.

However, geopolitical headwinds continue to persist, and the industry is facing key challenges, including inadequate charging infrastructures and insufficient incentives to push for user adoption.

What will it take for Asia's EV markets to maintain and accelerate their growth potential? Who will be the key stakeholders who will influence the outcome?

The Paper discusses the seen and potential challenges and what it will take for the e-mobility industry to overcome these barriers.

This Mobility Paper will cover:

- Geo-economic headwinds dampen consumer demand
- South Korea and Japan face tariff uncertainties
- Rise of the Chinese players
- Asean markets stay strong on EV
- What lies ahead: EV road bumps
- Key takeaways

Geoeconomic headwinds dampen consumer demand

Global demand for EVs has been on a steady incline, fuelled largely by an increasingly environmentally conscious population and broad incentives to drive adoption.

S&P Global Mobility forecasts global sales for battery electric passenger vehicles to hit 15.1 million units in 2025, up 30% from last year. They will account for about 16.7% of global light vehicle sales, compared to 13.2% in 2024.

Economic headwinds, however, threaten to dull consumer demand for expensive EVs in several markets.

The Trump administration in the US is planning to revise regulations under the National Highway Traffic Safety Administration (NHTSA) and United States Environmental Protection Agency (EPA) as well as revoke California Air Resources Board's waivers, which had allowed California to mandate stricter emission standards for trucks. Furthermore, provisions for clean vehicle credits in the Inflation Reduction Act will be removed under Trump's "One Big Beautiful Bill".

These moves will significantly deregulate the US market and OEMs will have less pressure to raise EV sales.

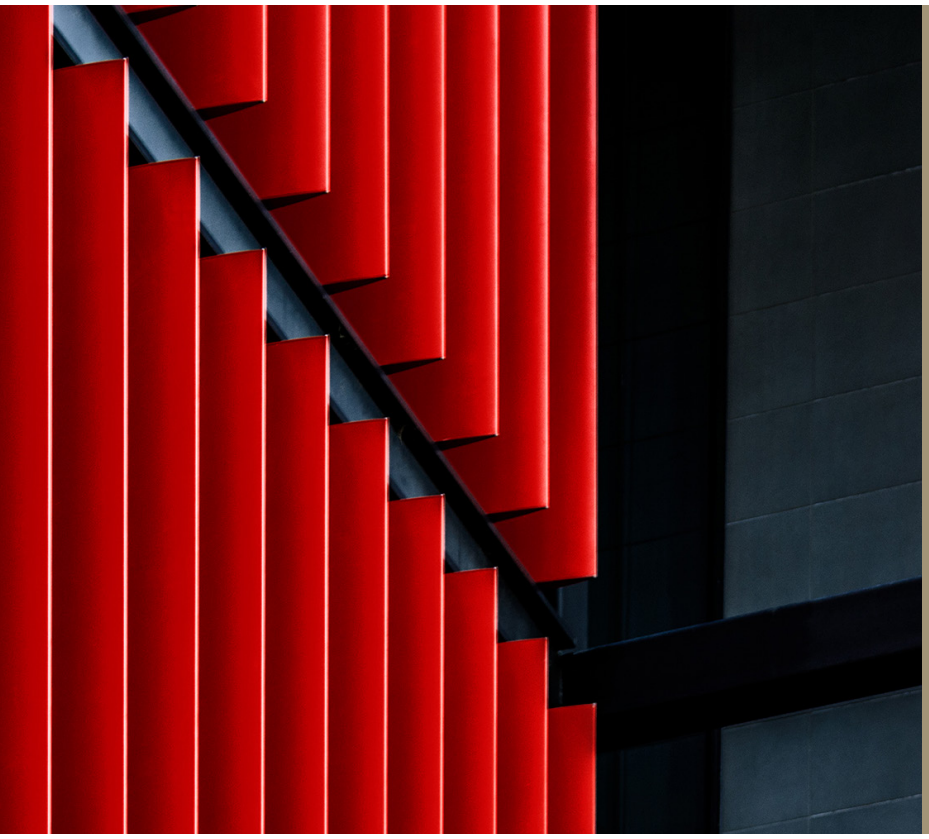
> **"The speed of electrification in the US is expected to slow down a lot. Economic headwinds are expected to harm consumer demand of those expensive EVs in many markets."**
>
> **Boni Sa**
> Director of Automotive Planning Solutions
> S&P Global Mobility

Over in Europe, S&P Global Mobility expects actions to be taken to meet new regulatory targets, following the European Commission's plans to revise compliance rules. Announced in early-2025, these aim to help the region's automotive industry move towards "AI-powered, connected, and automated vehicles" and push member states to take further actions on green corporate fleets.

These geoeconomic activities will likely dampen market growth of EVs.

As it is, battery EVs (BEVs) already are more expensive than traditional gasoline-powered or ICE (Internal Combustion Engine) vehicles -- though, the gap has narrowed with the arrival of new products.

The threat of US tariffs also has prompted some market players in South Korea to make strategic shifts.



> “If this trend continues over the long term, it is expected to exert downward pressure on the overall growth of Korea’s domestic BEV industry, affecting both OEMs and part suppliers alike.”

Kim Bora
Principal Research Analyst, South Korea Powertrain Forecast
S&P Global Mobility

Hyundai-Kia Motors Corporation (HKMC), for instance, is expanding its BEV and hybrid production in North America, while reducing export-oriented production volume from South Korea.

HKMC is accelerating investments in BEV and battery capacity at its meta plant in Georgia, USA, with affiliated companies such as Hyundai Steel, Hyundai Mobis, and Hyundai Transys also boosting their investment commitments in the US market.

Furthermore, US tariffs may have an indirect impact on Japan’s overall economic growth. The US-Japan trade framework, detailed in an executive order in September 2025, includes a 15% reciprocal tariff on general goods that is retroactive to August 7.

While the agreement caps tariffs at a lower rate for Japanese goods, it likely will put financial pressure on Japanese auto manufacturers, which may have to decide whether to absorb the cost or pass it on to consumers in a competitive global market.

> “Global economic headwinds also have pushed up EV price-points in Japan, making it less affordable for consumers.”

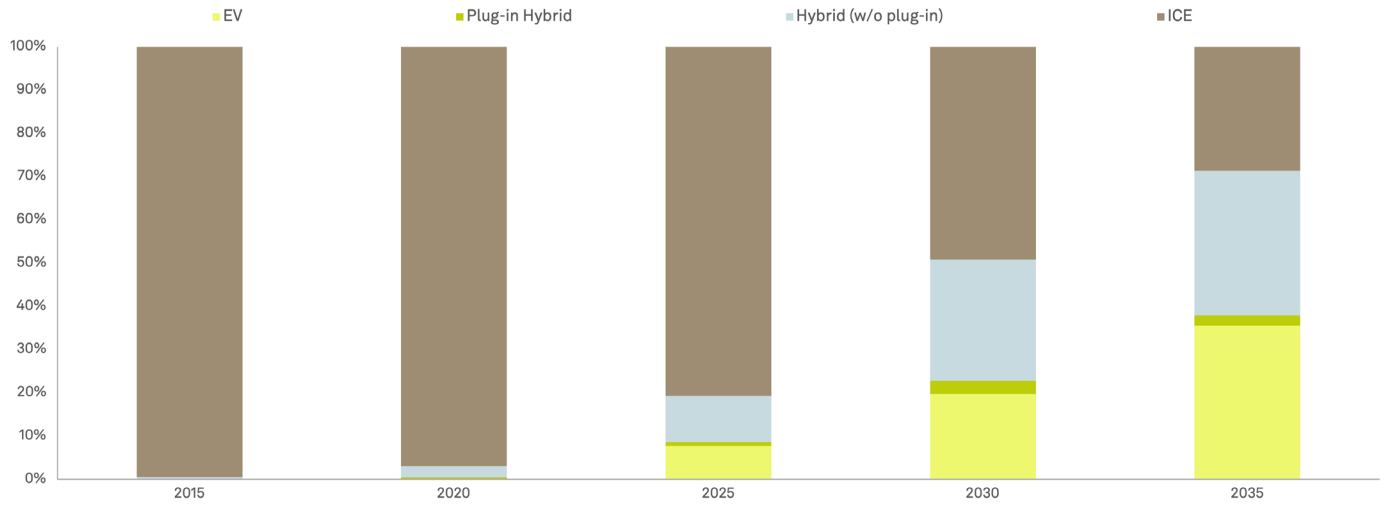
Takafumi Fujii
Japan Light Vehicle Sales Forecasts
S&P Global Mobility

Asean markets stay strong on EV demand

Amidst the geoeconomic uncertainties, though, Asean and China are bucking the downward trend and seeing strong demand.

Asean markets are developing regulatory frameworks to support the transition to e-mobility, such as offering both cash and tax incentives import duty exemptions. They also are rolling out stricter emissions regulations for traditional ICE vehicles to drive the move towards greener options.

ASEAN Light Vehicle Production by Propulsion System Forecast



Data compiled November 2025
Source: S&P Global Mobility
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Singapore's Land Transport Authority (LTA), for instance, introduced its Heavy Vehicle Zero Emissions Scheme and Electric Heavy Vehicle Charger Grant to support decarbonisation of heavy vehicles. With these initiatives, LTA hopes to reduce the ownership cost between electric heavy vehicles and ICE-heavy vehicles and support the development of electric heavy vehicle chargers in Singapore.

In 2024, EVs in the country accounted for one-third of all new cars registered, an increase from 18% in 2023. Electric cars and electric light goods vehicles make up 4% and 4.7%, respectively, of Singapore's total vehicle population as of end-2024. LTA is further targeting to deploy 420 electric buses by early-2026, pushing its aim to have electric buses comprise half of the country's public bus fleet by 2030.

> "EV demand is surging across Asean countries, fuelled by government incentives, increasing fuel costs, and environmental worries. This, in turn, is stimulating overall market demand."
>
> **Oracha Sakunbunma**
> Senior Analyst, ASEAN Light Vehicle Sales Forecast
> S&P Global Mobility

The Philippine Department of Trade and Industry also wants EVs to account for 21% of the country's total vehicle sales by 2030, with an initial target of 200 power charging stations. The Electric Vehicle Association of the Philippines projects that EV sales will hit 200,000 units by 2025, with hybrid electric car models, including IONIQ Electric, already available in the country. Chinese manufacturers, such as LEVDEO, Geely, and MG Motors also are expected to unveil their EV offerings in the Philippine market, while local manufacturers including To-Jo Motors Corp. and Philippine Electric Utility Vehicle, have launched e-jeepney and e-trike models.

It also is boosting local EV manufacturing and disrupting Japan's market dominance, paving the way for new Chinese entrants.

There is further untapped growth potential across the region where, China aside, the EV market remains nascent. While many international brands, such as Mercedes-Benz, BMW, and Volkswagen have launched EV products in the region, these models largely are deemed too expensive compared to legacy ICE vehicles.

The entrance of Chinese brands offering BEV products in several markets such as Japan, Thailand, and Malaysia may seem like a game changer. In the Asean countries especially, the Chinese EVs can benefit from local governments' incentives, as such, these have led to an acceleration of EV market in the Asean region. In Japan however, the take up rate is slower as there are other conversion factors at play such as brand loyalty, technology adaptation, charging infrastructure and local maintenance support.

> "BYD, for instance, offers lower price-points that can potentially drive demand in Japan's EV market," says Takafumi Fujii, S&P Global Mobility's analyst, "it is currently the only Chinese brand in the Japanese market, and soon, another Chinese EV brand Zeekr, will launch its premium products in Japan soon, but probably with a different strategy."

Rise of the Chinese EV players

New energy vehicle (NEV) sales in China, too, have seen rapid growth in 2025, climbing 30.2% between January and May. NEV penetration further grew from 39% to 48%, according to research from S&P Global Mobility.

The stability of China's regulatory environment, compared to Europe and the US, has played an important role in its market growth. The Chinese government has continuously supported the development of the local NEV industry and pushed the development of charging infrastructures as well as fast-charging stations on highways.

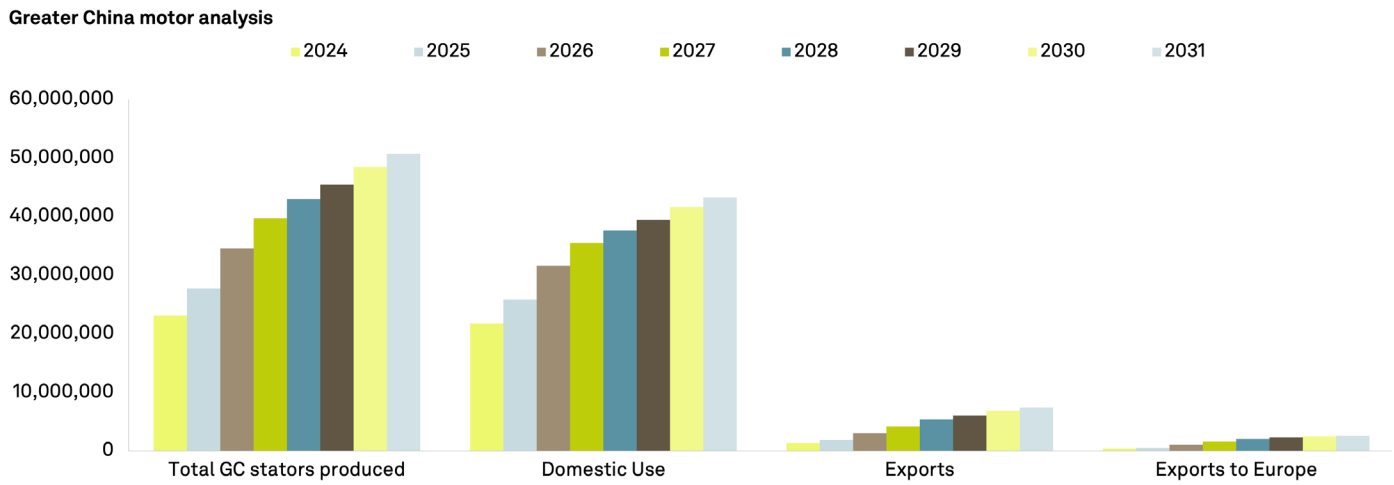
The availability of diversified powertrain technologies also has driven the rapid growth of China's NEV market. Local OEMs offer a wide range of both plug-in hybrid electric vehicles (PHEVs) for the volume market and range extended electric vehicles (REEVs) for the premium market segment. These grew alongside BEVs, effectively addressing different NEV customer demand.

Export, too, has proven a critical business for most Chinese OEMs. While Tesla is struggling in some global markets, which may impact the US carmaker's export volume from China, Chinese OEMs have been able to beef up their export revenue by exploring new destination countries and selling more models in existing ones.

PHEVs run on a hybrid of traditional ICE and electric motor. They also have larger battery capacity, compared to a regular hybrid, and can plug into an external power source to top up their battery.

REEVs run primarily on an electric motor but have a smaller engine that can recharge their battery.

Greater China will play a significant role in the global electric motor market at all levels



Data compiled October 2025
Source: S&P Global Mobility

> “Compared with other markets, the outlook of China’s NEV market growth is stable. Future new products and the development of charging infrastructures will continue to support market growth.”

Boni Sa
Director of Automotive Planning Solutions
S&P Global Mobility

There have been some export-related challenges for these OEMs, largely due to soft demand in Russia, tariffs from the European Union, and economic development headwinds in Asean. However, most Chinese OEMs have just kickstarted their export business, pushing sales to only a handful of markets globally last year. The impact of unfavourable geoeconomic conditions, hence, has not been significant.

With growth opportunities from entering more markets, selling current models, and launching new dedicated products in future, S&P Global Mobility expects China's vehicle export volumes to still hit growth.

S&P Global also believes the South and Southeast Asia (SSEA) region offers a "goldilocks zone" of affordable manufacturing, emerging market forces, and more consumers. S&P Global Ratings estimates that more than US$20 billion will be spent building BEV production in this region over the next few years.

S&P Global Mobility analysts anticipate SSEA will help Chinese carmakers diversify their operations and customer base. The region is home to more than 2 billion residents and has amongst the lowest car ownership worldwide, offering significant potential for growth. Its consumers not only prioritise affordability, they also are more receptive to new market brands and technology.

> "Genesis Motor is seeing notable shifts in their powertrain strategies, with weakening BEV demand resulting in postponed BEV launches or a reorientation towards FHEV."

Kim Bora
Principal Research Analyst, South Korea Powertrain Forecast
S&P Global Mobility

All these factors present another boon to Chinese carmakers. "In light of intense competition at home, the goldilocks zone offers Chinese carmakers [an alternative] means of exporting to markets such as Europe, which at present impose steep tariffs on direct China-originated BEV imports," S&P Global Mobility notes.

There are bright sparks also in South Korea, where the market is expected to see sustained growth in full hybrid vehicles (FHEVs).

> "Potential rollbacks in US Greenhouse Gas (GHG) Corporate Average Fuel Economy (CAFE) standards or the withdrawal of California Air Resources Board's ACC II (Advanced Clean Cars) regulations could further slow the momentum of BEV adoption in the Korean market."

Kim Bora
Principal Research Analyst, South Korea Powertrain Forecast
S&P Global Mobility

South Korea's BEV market accounts for approximately 12% of total vehicle sales as of 2025 September YTD. Between 2022 and 2024, BEV market growth has slowed down to around 7%~ 8% of market share. In 2025, however, the market has shown a clear rebound, recording a new pace of growth.

However, South Korea's BEV market still faces fundamental obstacles, including recurring quality issues such as fire incidents and ICCU (Integrated Charging Control Unit) malfunctions, limited charging infrastructure, and high BEV price tags.

Furthermore, the country's regulatory landscape is highly sensitive to US policy developments.

Local players, though, may be able to buffer some of this impact with the anticipated growth in Asean.

"Growing demand for EVs presents significant opportunities for the Asean region, particularly in manufacturing, investment, and technology development. Countries like Thailand, Indonesia -- which holds the world's largest global nickel reserve -- and Vietnam, are attracting foreign direct investment from global automakers and battery producers, positioning themselves as key EV production hubs."

Jessada Thongpak
Senior Analyst, Light Vehicle Production Forecasting
S&P Global Mobility

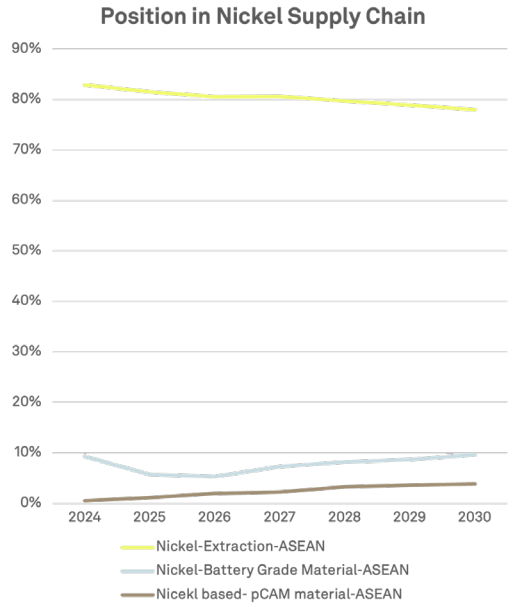
The importance of battery

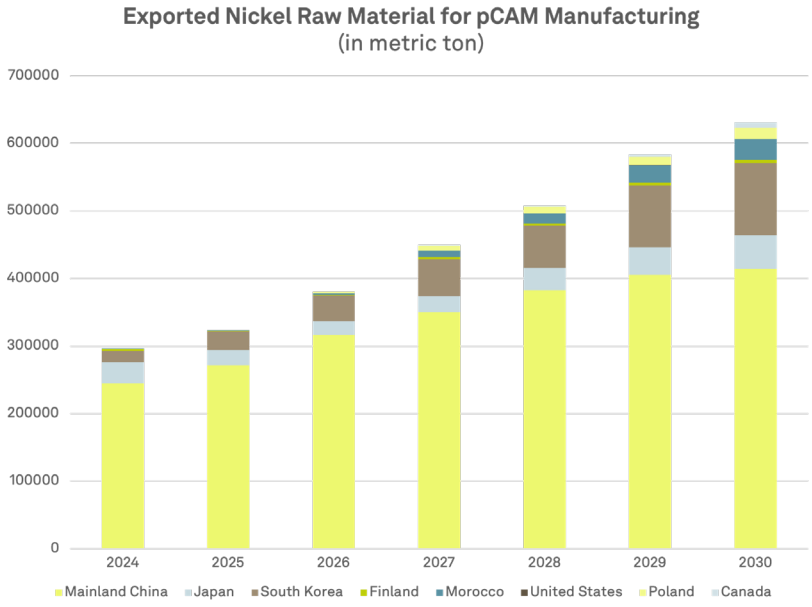
South Korea is home to the world's second-largest battery industry and the accelerated electrification across the Asean region is likely to translate into greater demand for Korean batteries, materials, and production equipment.

Growth in Asean's EV market also can have positive knockoff effects for the region itself.

Its resources, such as Indonesia's deep reserves of critical minerals, including nickel, and government incentive schemes (as mentioned in this paper) have propelled the region's growth momentum.

ASEAN is the global hub for nickel extraction for EV batteries





Data compiled October 2025
Source: S&P Global Mobility

"Governments must support this growth with clear policies and coordinated efforts across the EV value chain, from raw materials to manufacturing and recycling. Strengthening infrastructure, local expertise, and regional collaboration will be key to building a competitive and sustainable EV ecosystem."

Jessada Thongpak
Senior Analyst, Light Vehicle Production Forecasting
S&P Global Mobility

And as EV production scales up, Asean stands to benefit from increased exports, job creation, and supply chain development across battery and component manufacturing.

The shift towards electrification also is in line with broader green growth and sustainability goals, encouraging economic diversification. In addition, it fosters technology transfer and innovation through global partnerships, further boosting Asean's long-term competitiveness in the automotive sector.

Regional markets can unlock EV battery growth potential by tapping Indonesia's vast nickel resources to produce batteries for BEVs, while ensuring compliance with ESG standards.

South Korean players also must look to advance their products to better tap demand from Asean.

Battery manufacturers, including LG Energy Solution, SK On, and Samsung SDI, supply to global vehicle OEMs.

Beyond current lithium-ion technology, it is imperative they accelerate the development of next-generation batteries, such as mid-nickel NCM, solid-state battery, and sodium-ion battery systems, while driving innovation in materials and manufacturing processes to reduce overall battery costs.

There also must be advancements in new technologies that enhance charging quality and speed.

In addition, diversification beyond BEV applications is essential for component suppliers, particularly battery manufacturers.

The growing shift towards the ESS (Energy Storage System) industry indicates this is not a matter of choice, but of survival. Ultimately, companies that successfully adapt and endure will be the ones to emerge as leaders in the future BEV market.

> "For automotive OEMs, this period represents an important opportunity to build deeper knowledge and expertise in BEV technologies. Although the market is experiencing a BEV slowdown, the BEV era inevitable, so OEMs must continue to enhance and refine their BEV capabilities in preparation for the transition."

Kim Bora
Principal Research Analyst, South Korea Powertrain Forecast
S&P Global Mobility

What lies ahead: EV road bumps

By 2035, S&P Global Mobility expects Asean markets to see e-mobility penetration of more than 30%, led largely led by HEVs (hybrid EVs) and BEVs.

However, the adoption of BEVs has been slowed by delayed BEV product strategies from major brands, such as Toyota and Honda, as well as the limited availability of BEV options in top-selling segments, such as pickup trucks in Thailand and multi-purpose vehicles (MPVs) in Indonesia.

And despite some initial push here, there still are insufficient government incentives and supporting infrastructures. This can pose key challenges to BEV growth, note S&P Global Mobility analysts.

The journey forward also will have to address consumer concerns about the apparent lack of charging infrastructure. Just 59% of global respondents are aware of a charging station near them, according to an S&P Global Mobility study on consumer sentiments about EV charging.

Charging Infrastructure Famility today and tomorrow on aglobal scale

60%
Global respondents know a nearby charging location.

Of which:

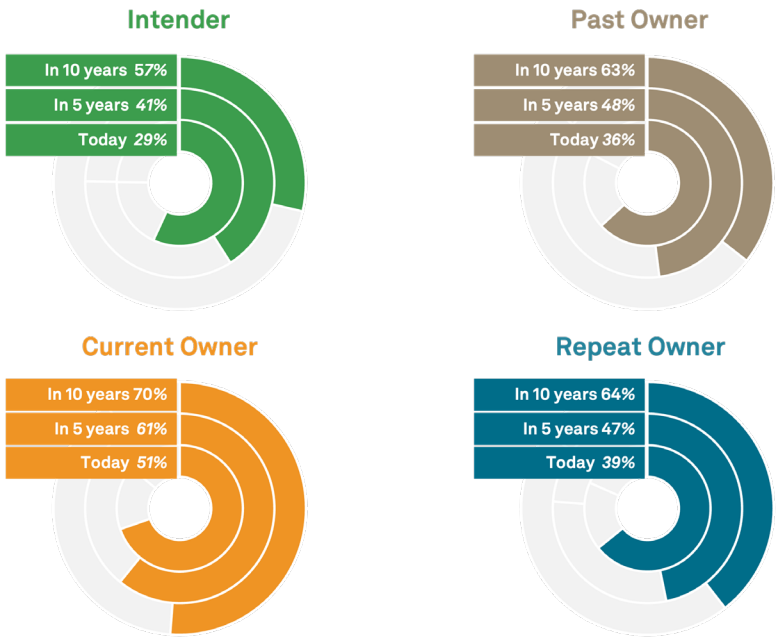
90%
Understand and feel comfortable with charging operations

And

53%
Did not experience any issues while using EV public charging station

24%
Will consider buying EVs if workplace charging is available.

Charging infrastructure sufficiency perception increases with ownership status: Answer "Yes"



As of July 2025
N=7,979
Source: S&P Global Mobility.

As of July 2025
N=7,979
Sources: S&P Global Mobility

In the US, two out of three respondents say the EV charging infrastructure is insufficient for their needs. "While we don't currently track Asean countries in the consumer survey, it is very likely this sentiment is shared there as well," notes **S&P Global Mobility analyst, Diana Quezada**. "It's only in the last five years that the EV charging infrastructure, in the region, has surpassed the thousand units. Even though the numbers have picked up since then, Asean is still lagging far behind more advanced markets like India, China, and South Korea."

The good news is markets in the region have pledged to expand their EV charging footprint. For example, Singapore is targeting to roll out 60,000 EV charging points across the city-state by 2030, alongside its initiatives to fuel EV adoption. As of March 2025, more than 60% of carparks in its public housing estates have charging points deployed.

Thailand, which is the largest EV market in Southeast Asia, also is looking to boost its EV charging infrastructure to encompass 12,000 DC fast-charging outlets by 2030.

The South Korean government, too, plans to expand the number of public BEV chargers, both AC and DC, to 1.2 million units by 2030. While there currently are 450,000 chargers nationwide, 42% of these are restricted to apartment residents, creating significant access issues for general BEV users.

Amongst OEMs in the country, BMW has been the most active in South Korea, installing an estimated 2,400 chargers. Tesla operates more than 1,000 Superchargers at 150 locations across the country, while Hyundai Motor runs 286 high-power 350kW E-pit chargers and plans to expand this network to 500 units by end-2025.

Regulatory action can further address gaps in the local market and ensure its underlying infrastructure is able to support user adoption.

About 70% of the South Korean population live in apartments or multi-unit houses, resulting in most BEV users relying on shared charging infrastructures, rather than dedicated private chargers. However, new apartments currently are mandated to provide chargers for only 10% of total parking spaces. This raises concerns

"In our 2025 charging infrastructure forecast, we saw Asean rising in DC (direct current) charging infrastructure with a little over 700 stations, and over 25,000 slow-charging stations. These numbers aren't even 10% of more advanced countries like South Korea, which had over 350,000 slow-charging stations and over 47,000 fast ones during the same period."

Diana Quezada
Senior Research Analyst, Electric
S&P Global Mobility

of severe shortages as BEV adoption accelerates.

In addition, many installed chargers remain out of service due to inadequate maintenance, which underscores the urgent need for stronger government-led regulatory and management measures.

Extreme weather, from summer or winter seasons, also diminishes charging efficiency and battery performance, necessitating technical solutions. And while the development of low-cost batteries can drive down cost for consumers, efforts here must be accompanied by stronger safety measures to prevent thermal runaway and mitigate risks of explosion.

The Seoul administration has said it is implementing several key changes to its EV standards in 2025, including mandating safety labelling for all EV batteries. A new EV battery certification scheme also has been implemented, in which a government-led system replaces self-certification to improve safety and address public concerns over battery fires.

The region, Asean in particular, has the potential to outshine its global counterparts and fire up the EV market. However, it will need to first clear the road bumps and plug gaps that threaten to stall adoption.

> “Japan, too, will need to further develop its charging infrastructure to ensure sustainable demand and growth in its EV market. More BEV vehicles also should be introduced in the market to offer more consumer choices at affordable prices.”

Takafumi Fujii
Japan Light Vehicle Sales Forecasts
S&P Global Mobility

"Korea's BEV charging network remains concentrated in urban areas, with a shortage of DC fast chargers and issues involving insufficient maintenance still unresolved. Several private Battery Electric Vehicle charging infrastructure companies have exited the market due to low profitability, which further highlights the urgent need for government support and business model reform."

Kim Bora
Principal Research Analyst, South Korea Powertrain Forecast
S&P Global Mobility

"To overcome the identified barriers and accelerate EV adoption, Asean nations should implement a multi-faceted strategy centred around robust government incentives, coupled with strategic infrastructure development and market stimulation."

Oracha Sakunbunma
Senior Analyst, ASEAN Light Vehicle Sales Forecast
S&P Global Mobility

Key Takeaways

EV consumer demand shows signs of slowing down in US and Europe, but remains on a growth path in Asia, including Asean.

Asean markets are developing regulatory frameworks to support the transition to e-mobility, including offering both cash and tax incentives import duty exemptions.

Market players in South Korea and Japan face uncertainty amidst US tariffs.

EV demand is surging in Asean countries, fuelled by government incentives, increasing fuel costs, and environmental concerns.

The stability of China's regulatory environment, compared to Europe and the US, plays a key role in its market growth.

Export, too, has proven a critical business for most Chinese OEMs, with China's vehicle export volumes expected to register growth.

Growing demand for EVs presents significant opportunities for the Asean region, particularly in manufacturing, investment, and technology development.

Countries such as Thailand and Indonesia, which holds the world's largest global nickel reserve, are attracting foreign direct investment from global automakers and battery producers.

Asian governments must support EV market growth with clear policies and coordinated efforts across the EV value chain, from raw materials to manufacturing and recycling.

To overcome barriers and accelerate EV adoption, Asia should implement a multi-faceted strategy centred around robust government incentives, strategic infrastructure development, and market stimulation.

Editor

Boni Sa

Director, Automotive Planning Solutions
S&P Global Mobility

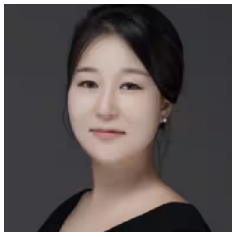
Boni Sa serves as the director for S&P Global Mobility Automotive Planning Solution. Mr. Sa has more than 15 years' experience on the automotive industry consulting business. His expertise covers automotive industry analysis, strategy planning and forecast, powertrain and NEV market strategy, overseas market entry, automotive technology development, mobility service, etc. Mr. Sa joined IHS since 2009. He also worked for a global automotive supplier on global electrification strategy development. He has a bachelor degree from Beijing University of Aeronautics and Astronautics.

Jessada Thongpak

Senior Analyst, Light Vehicle Production Forecasting, ASEAN
S&P Global Mobility

Jessada covers the light vehicle production forecasting across South East Asia region (ASEAN), including Indonesia, Malaysia, Philippines, Thailand and Vietnam. He has more than 10 years of experience in the automotive industry in the ASEAN region and over 5 years in vehicle production forecasting in the company . His expertise also includes ASEAN Automotive industry research and OEMs strategic analysis.

Jessada holds an MBA from Khon Kaen University, Khon Kaen, Thailand.



Bora Kim

Principal Research Analyst, South Korea Powertrain Forecast
S&P Global Mobility

Bora Kim is responsible for Sales-Based Powertrain forecast and electrification trend analysis in the South Korean market.

Prior to joining S&P Global, Bora worked at Volkswagen Group Korea as the Head of Technical Compliance for the Powertrain department. Additionally, Bora has held roles at various automotive OEMs, including Stellantis APAC and GM Korea, with a focus on powertrain emission compliance, CO2 regulations, and powertrain portfolio planning.

With 16 years of experience in these fields, Bora now analyzes market demand for various propulsion systems in the South Korean market.

Bora is currently pursuing a graduate degree in Mechanical Engineering at Hanyang University and holds a Bachelor's in Mechanical System Engineering from Hongik University.

Editor

Oracha Sakunbunma

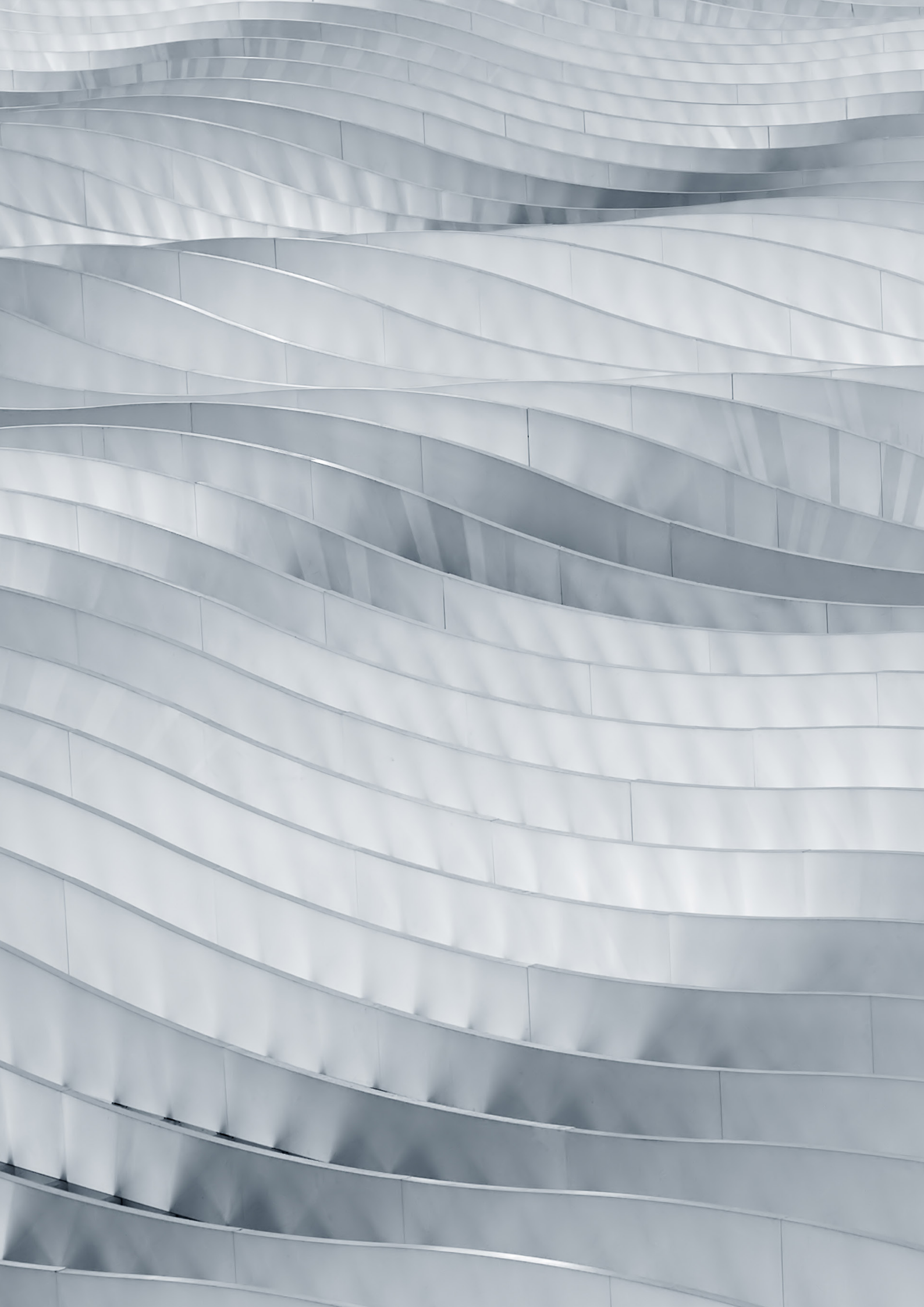
Senior Analyst, ASEAN Light Vehicle Sales Forecast
S&P Global Mobility

Oracha serves as Senior Analyst, S&P Global Mobility. She is responsible for sales forecasting regarding Thailand and Philippines market. She has more than 10 years of experience in automotive business and over 5 years in vehicle sales forecasting at S&P Global Mobility. Oracha completed bachelor's degrees in Applied Statistics and holds a master's degree in Master of Business Administration (International Business) from University of Tasmania, Australia.

Takafumi Fujii

Senior Analyst, Powertrain Sales Forecasting,
Production & Design
S&P Global Mobility

Takafumi Fujii analyzes vehicle sales and powertrain for light vehicles at S&P Global Mobility. Takafumi is responsible for light vehicle sales and powertrain forecasts. The current main task is electrification trends forecast for the Japanese market. Before joining S&P Global Mobility, he worked in sales planning and product planning at Japanese and foreign OEMs for more than 10 years.



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At S&P Global Mobility, we provide invaluable insights derived from unmatched automotive data, enabling our customers to anticipate change and make decisions with conviction. Our expertise helps them to optimize their businesses, reach the right consumers, and shape the future of mobility. We open the door to automotive innovation, revealing the buying patterns of today and helping customers plan for the emerging technologies of tomorrow.

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