



Taming Complexity with Agility:

Confident Scenario Planning
for OEM Strategy

DECEMBER 2025



Introduction: Faster, smarter tools are changing the forecasting game and empowering OEM planners

For automotive original equipment manufacturers (OEMs), success in a complex and volatile market depends on the ability to adapt to rapidly changing market forces, including political, economic, technological, and sociocultural factors. Across the globe, auto manufacturers are attempting to develop strategic plans that enable them to maneuver through various market scenarios with monumental business implications. These challenges include navigating tariffs, monitoring policy directives, managing pricing pressures, adapting to market shifts such as electrification and battery electric vehicle (BEV) adoption, and responding to industry consolidation.

To compete in this environment, OEMs need real-time, high-quality data to make informed decisions that reduce risk and enable effective growth strategies. Yet, despite the availability of agile solutions offering real-time and dynamic intelligence, many OEMs continue to rely on spreadsheets and outdated software.

This approach is not only inefficient but also ineffective, as these legacy tools have significant limitations, like the inability to process massive amounts of data, automatically refresh insights, or explore multiple scenarios simultaneously.

With Mobility Global's [Forecast Adjustment and Simulation Tool \(FAST\)](#), OEMs can overcome those challenges and give planners an agile scenario planning solution that drives confident investments across demand, product, volume, and sales.

This whitepaper is designed to equip you with the insights you need to make informed business decisions with confidence. Drawing from our recent webinar, [Beyond 2026 Forecasting: Scenario Planning for Resilient OEM Strategy](#), we outline the realities of today's market environment and illustrate why traditional tools fall short in supporting modern scenario planning.

By examining current pressures and highlighting more dynamic, integrated approaches, this paper demonstrates how OEMs can strengthen their forecasting capabilities and build more resilient strategies for the years ahead.

Who Needs Better Scenario Planning?

Three primary OEM roles are tasked with scenario planning, and each face unique challenges.

Volume Planners

Volume planners are responsible for strategic and operational activities focused on collecting data and insights that drive long-term strategies. They oversee ad hoc “what if” inquiries, recurring annual or semi-annual business planning cycles, and the evaluation of market product mix and sales potential. Their work involves analyzing and simulating total industry volumes, key segments, competitive positioning, and their own portfolio performance.

Volume planners' top challenges:

- **Timeliness.** Forecast updates are received only annually, semi-annually, or quarterly, while market conditions can change from week to week.
- **Conflicting or incomplete assumptions.** Internal assumptions on overall market growth or market mix often differ from external forecasts.
- **Parallel planning.** The need to plan for different outcomes simultaneously creates significant workload challenges, particularly when ad hoc inquiries arrive on short notice.
- **Limited resources.** Small teams must handle all these demands with increasingly constrained budgets and headcounts.

Sales Planners

Sales planners operating at the regional level enable sales teams to understand market dynamics, identify opportunities, and manage their pipelines. They conduct performance analysis, optimize and adapt strategies, and provide pipeline management and sales steering guidance.

Sales planners' top challenges:

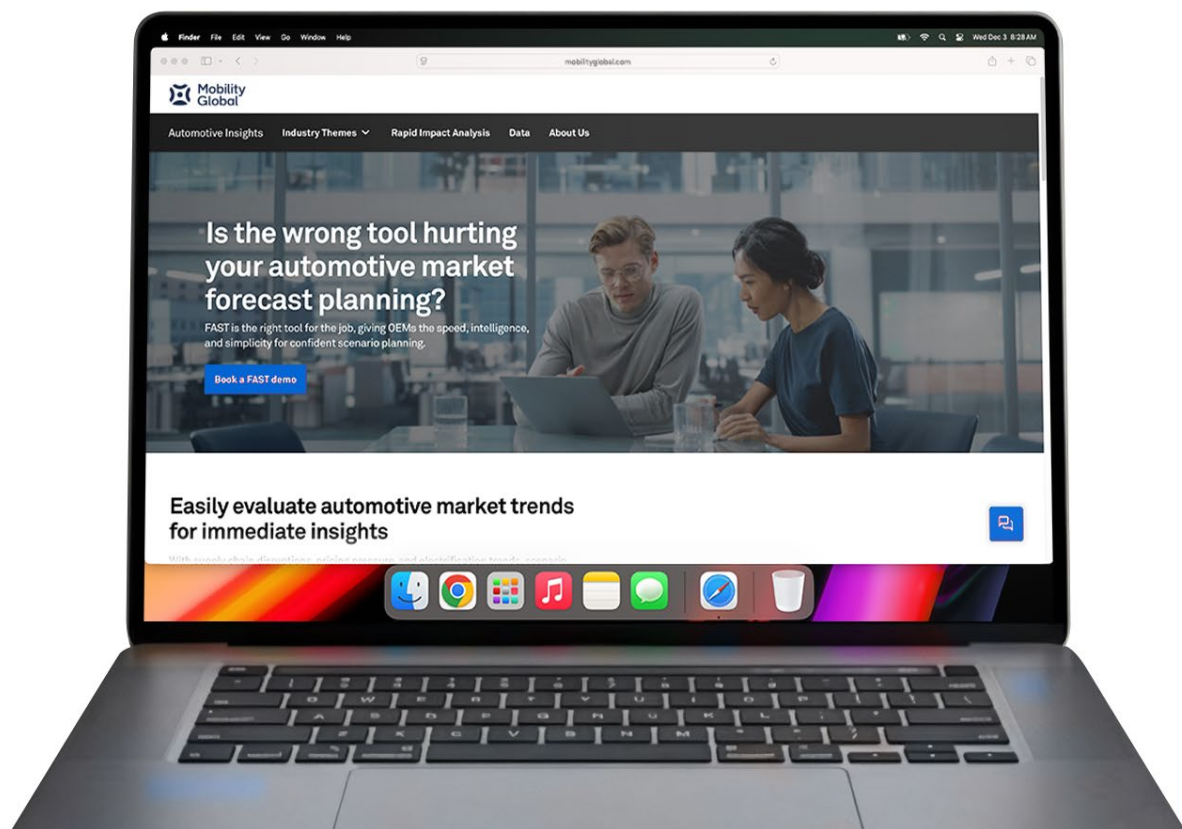
- **Dependency on headquarters planning.** This often only occurs a few times per year, leaving regional teams without the agility they need to change course quickly.
- **Unmet data requirements.** Sales teams need comprehensive data with detailed segmentation views for their specific regions delivered monthly at minimum, not quarterly or semi-annually.
- **Inefficient and incorrect tools.** This deficiency forces many to rely on spreadsheets, which weren't designed to perform complex planning activities.

Strategic and Product Planners

Strategic and product planners focus on collecting data and insights that drive long-term strategies for product development and market penetration. They evaluate consumer behavior shifts, monitor legal and compliance regulations, identify strategic product opportunities, and guide portfolio planning decisions.

Strategic and product planners' top challenges:

- **Inaccurate data.** Without reliable scenario planning data, they struggle to reduce risk and develop sound growth and investment strategies.
- **Inefficient and incorrect tools.** Like their colleagues in other functions, many strategic planners rely on spreadsheets for complex planning activities, risking both inefficiency and inaccuracy.
- **Limited resources.** Workforce reductions and budget cuts across the industry are forcing teams to do more with less support and fewer financial resources.



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What's Missing from Most Scenario Planning Tools

The typical scenario planning process lacks several critical capabilities:

- Quick and tailored analysis with seamless adjustments and modifications at both high and granular levels.
- The ability to simultaneously evaluate multiple scenarios at one time.
- Easy-to-use tools with graphical editing capabilities and the ability to save evaluations for future use.
- Data consistency maintained across the entire planning process.

Topics for consideration:

1. What does your scenario planning process look like? What tools are you using to perform these tasks?
2. How much time does it take to perform your scenario planning activities with your current process?
3. Are you confident in the accuracy of the results?

What's Complicating Scenario Planning for OEMs?

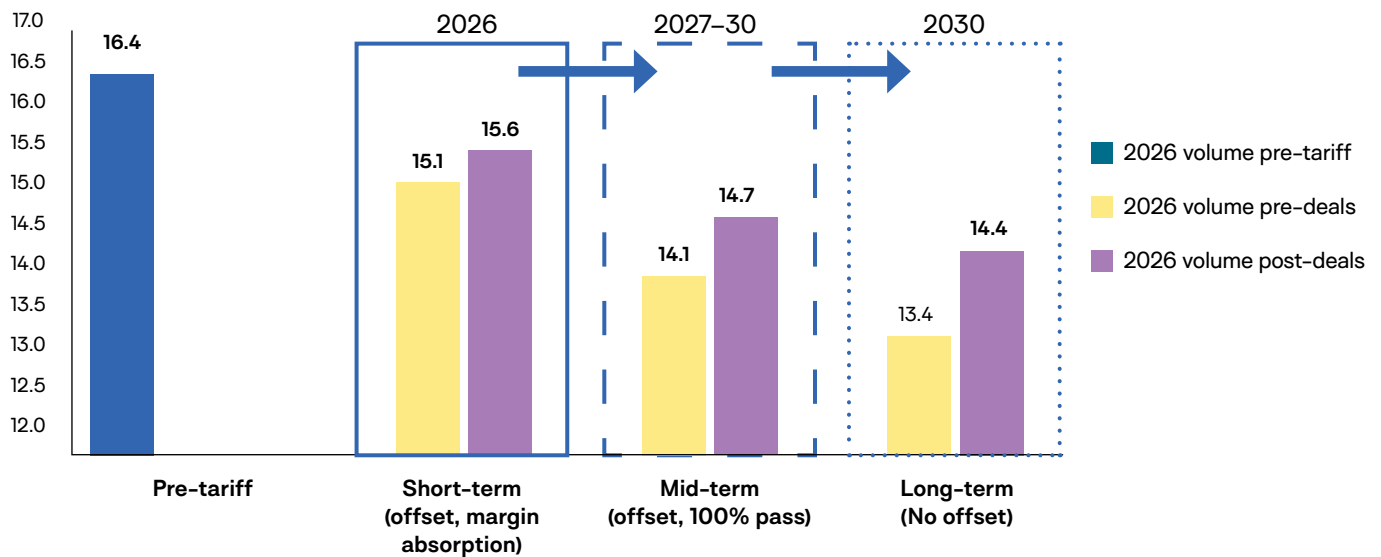
The challenges facing OEM scenario planners extend far beyond tool limitations. The automotive landscape itself has become exponentially more complex, requiring sophisticated analytical capabilities to navigate successfully.

Global Trade Intricacies and Tariffs

The automotive tariffs landscape has created extraordinary forecast volatility. In early 2025, original tariff proposals threatened to deteriorate the US market significantly. While recent trade deals with Japan, the European Union, and South Korea—combined with government offsets—have stabilized projections somewhat, significant complexity remains.

Tariff costs add substantial financial burden. Some OEMs now face monthly tariff expenses exceeding \$600 million—in many cases representing more than 5% of their new light vehicle sales revenue. These costs are currently being subsidized through margin absorption rather than passed to consumers, but that approach may not be sustainable indefinitely.

US light vehicle sales: Bottom-up tariff impact simulation (millions)



Data compiled September 2, 2025
 TIV = total industry volume: LVS = light vehicle sales
 Source: Mobility Global, Consulting, Tariff impact model.

Regulatory changes have been equally dramatic. The potential rollback of the National Highway Traffic Safety Administration's Corporate Average Fuel Economy (CAFE) standards to 35 MPG—essentially returning to 2020–2021 levels—has fundamentally altered the electrification equation and reduced projected battery electric vehicle (BEV) demand in the United States. There is also a strong sense of economic uncertainty across all industries, making it difficult to predict quarterly economic conditions in the US or globally.

Impact of tariffs on US TIV

Breaking News: A pass-through of tariffs would push the TIV to 14.5 mn units without localizer.

US light vehicle sales: Bottom-up tariff impact simulation (millions)

- 2026 volume pre-tariff
- 2026 volume pre-deals
- 2026 volume post-deals

• If the White House would not extend the offset through 2030 the TIV would have reached 14.7 million units in 2027 as importers transfer costs to consumers, resulting in a loss of market share.

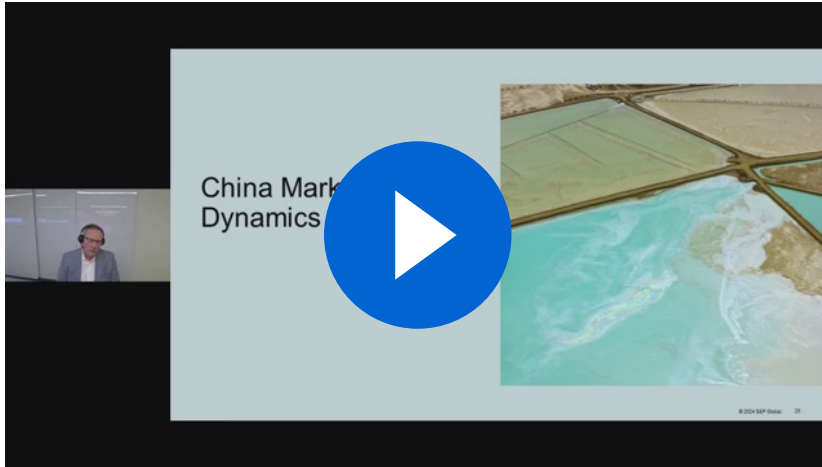
• Thus, the threat of a 14.5 million units has been pushed out towards 2030.

Watch Mobility Global analyst Guido Vildozo explain how tariffs are impacting automakers.

Global Competition and Regional Fragmentation

Europe's automotive landscape reveals deep regional divisions, with every country following its own trajectory on electric vehicles. While the European Union pursues a 100% CO2 reduction target by 2035, individual regions show vastly different EV adoption rates: Scandinavia and Northern Europe exceed 40% BEV penetration, while Southern and Eastern Europe lag below 5%.

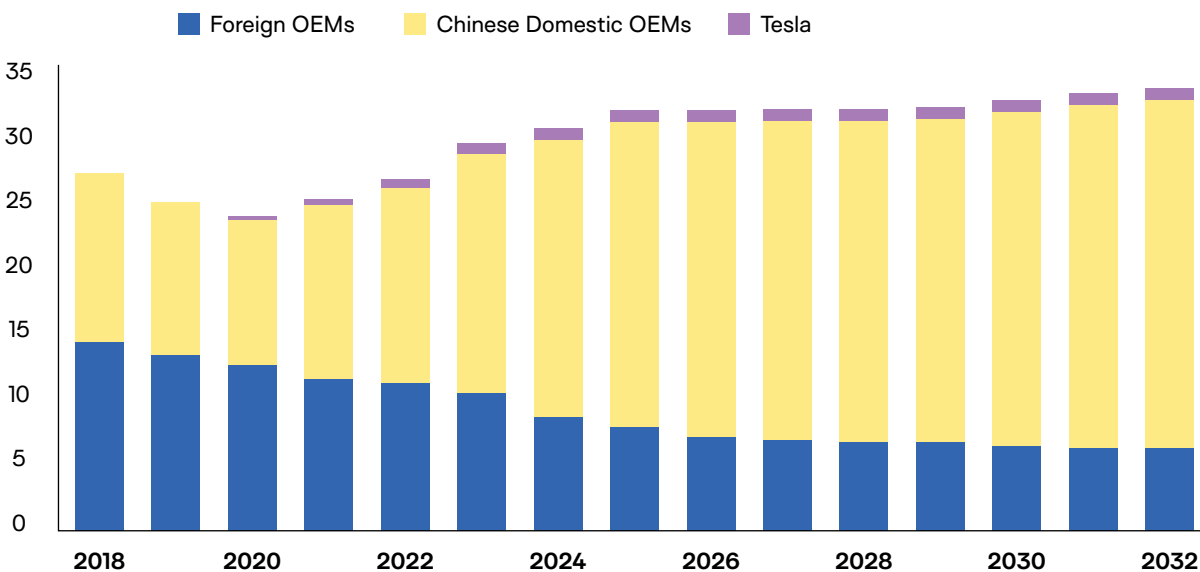
Many European countries have also backed away from aggressive internal combustion engine (ICE) ban timelines, adding further uncertainty to the market. OEMs are responding by extending ICE platforms and developing range extenders, requiring entirely new capital planning strategies.



Mainland China presents an equally formidable competitive challenge. Chinese OEMs now dominate their 25–30-million-unit home market, with Western OEMs losing significant production share. And “China Speed”—a shift toward agile planning processes that dramatically reduce planning cycles—has become a competitive advantage that traditional Western OEMs struggle to match.

Watch Mobility Global analyst Michael Robinet delve into market changes in China.

Mainland China light vehicle production (millions)



Data compiled August 26, 2025

Source: Mobility Global, August 2025 LV Production Forecast

Consumer Demand Shifts and Electrification Trends

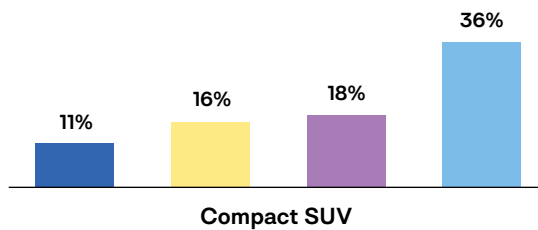
Vehicle complexity driven by changing powertrain strategies and growth in technology and autonomy has also made planning more difficult. The financial calculus of powertrain transitions has become particularly sobering.

Current sales data reveals that consumer willingness to pay rarely aligns with the cost to build electrified vehicles. In North America especially, generating profit on many EVs will remain challenging for what remains of the decade.

BEV Natural Demand

depends on consumer adoption stage and vehicle price

- No IRA 45X, NMC100%
- No IRA 45X, LFP100%
- IRA 45X, NMC100%
- IRA 45X, LFP100%

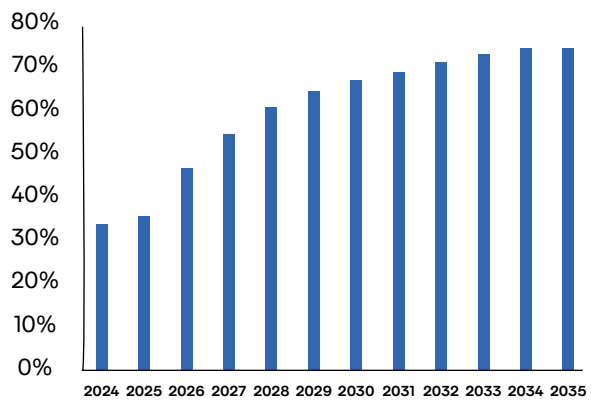


Source: Mobility Global, BEV Adoption Analysis Sample

BEV Supply

by Brand and Segment

BEV availability (% of brand segments with BEV offered)



The compact SUV segment in the US illustrates the profitability challenges facing OEMs in the transition to electrification. Consumers show little willingness to pay premiums for BEVs in this segment, particularly due to concerns around range and charging convenience. Hybrid vehicles present stronger margin opportunities, while range extenders could achieve profitability by 2030 once lithium iron phosphate (LFP) battery capacity scales up.

Watch Mobility Global analyst Guido Vildoza explain current changes in consumer demand.

Unknown Unknowns and Black Swan Events

Beyond known complexities, OEMs must also prepare for unpredictable disruptions, such as 2025's semiconductor shortage, which demonstrated how unforeseen supply chain disruptions can impact production. Similar risks lurk in other areas: chip production problems, supply chain disruptions affecting critical components, geopolitical events affecting trade routes, and other events that traditional planning methods cannot react to.

Internal Resource Constraints and Manual Workflows

The pressure to do more with less is not going away. Smaller teams working with reduced budgets are often reluctant to adopt new solutions and processes that incur costs or require time-consuming onboarding and training, even when current tools clearly fail to meet their needs.

Additionally, manual data entry mistakes, missing values, outdated data, or system inconsistencies reduce forecasting accuracy and lead to unreliable decision-making. The variety of disparate data sources that various OEM teams must manually piece together leaves substantial room for errors that carry significant risks.

Data Security Requirements

Data security is critical for OEMs to ensure that proprietary and sensitive information is protected. This often leads to requirements that tools and solutions be integrated behind secure firewalls with internal IT support, adding another layer of complexity and cost to any new solution adoption.

Topics for consideration:

1. How agile is your current process, and are you able to evaluate multiple scenarios at once?
2. Does your current workflow process allow you to analyze at a high-level and granularly?
3. Does your current process maintain data consistency throughout the process?



The Costs of Poor Planning

When scenario planning fails, the consequences extend throughout the organization and can impact the bottom line for years. The costs manifest in several ways.



Revenue and production losses occur when inaccurate forecasts lead to inventory mismatches, missed market opportunities, or production inefficiencies. When an OEM overproduces vehicles for which demand fails to materialize or underproduces popular configurations, each mistake represents lost revenue and wasted capital.

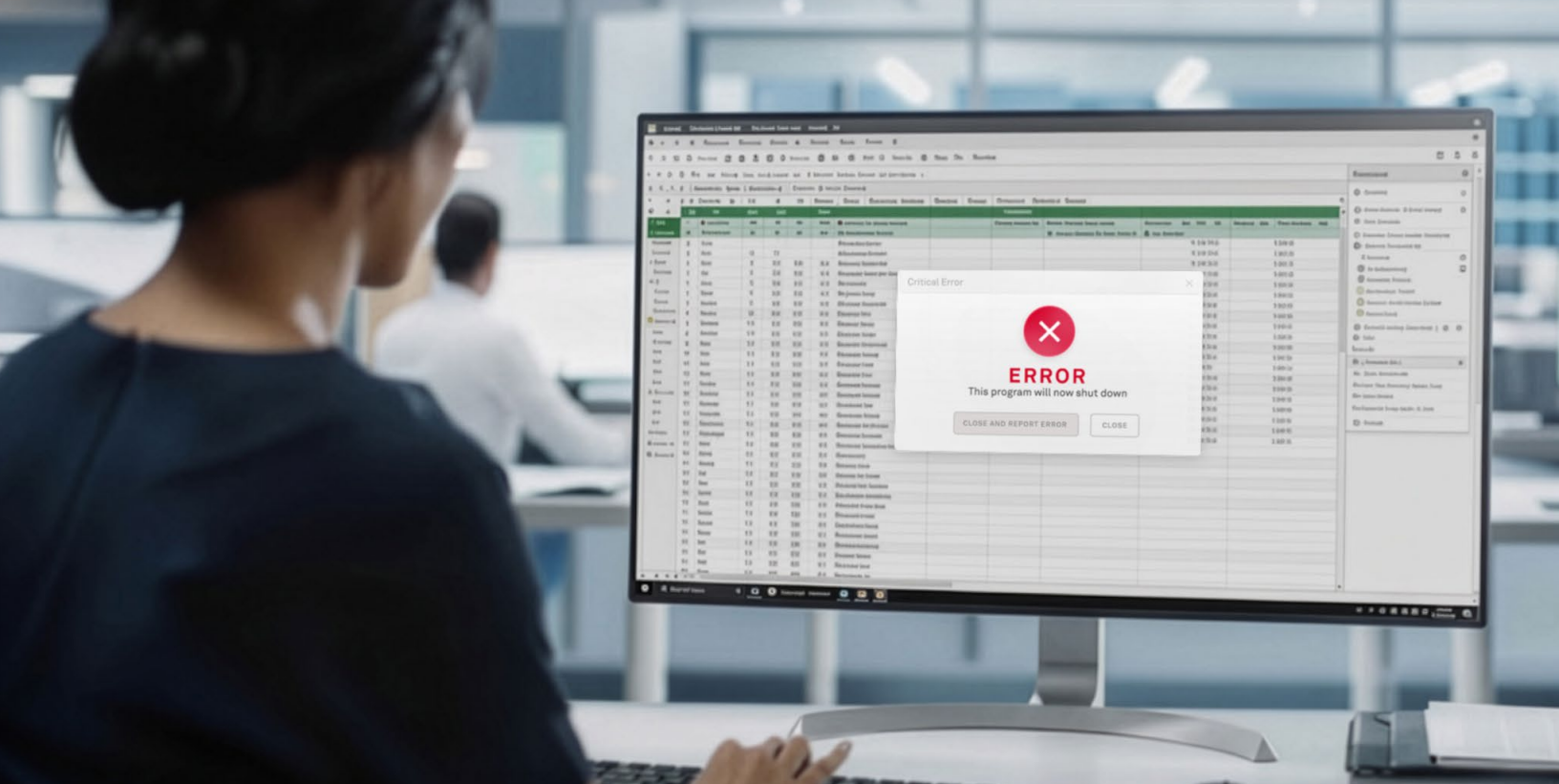


Competitive disadvantages accumulate as competitors with more agile planning capabilities move faster to capitalize on market shifts. While one OEM struggles to update its annual forecast in response to a policy change, another with real-time scenario planning capabilities has already adjusted its strategy and is gaining market share.



Negative customer impacts and brand damage result when poor planning leads to product availability issues, pricing inconsistencies, or misalignment between marketing promises and actual product delivery. In an era when customer experience directly influences brand perception and loyalty, these planning failures can have lasting reputational consequences.

The most recent semiconductor shortage provided a clear illustration of how traditional, static planning methods fall short in dynamic environments. The lack of real-time data integration and adaptive forecasting led to some OEMs experiencing avoidable production delays, missed sales targets, and higher operational costs.



Tools of the Trade: Why Spreadsheets and Legacy Software Fall Short

Many OEMs continue to rely on spreadsheets and legacy software for scenario planning despite their severe limitations.

Spreadsheets make collaboration across business units virtually impossible. You cannot easily load past history or forecasts from enterprise resource planning (ERP) systems, and the speed required to react and replan in the face of disruption is simply not achievable in a spreadsheet environment.

Other limitations:

- These tools cannot process large amounts of data and experience significant performance issues when dealing with the massive datasets required for comprehensive scenario planning.
- They offer limited data visualization and analysis, which hamper insight generation, and often lack visual editing capabilities to quickly adjust scenarios and see immediate impacts.
- Data doesn't automatically refresh, requiring manual effort to import up-to-date datasets before beginning work—effectively starting over each time market conditions change.
- They cannot easily explore multiple scenarios simultaneously, forcing planners to work sequentially through alternatives and making it difficult to compare outcomes side by side.
- Lack of machine learning, AI, and business logic algorithms means planners must manually encode relationships and dependencies, increasing both time investment and error potential.
- Forecasting solutions built in spreadsheets require continuous in-house technical support, diverting IT resources from other priorities.

Using inferior forecasting tools creates a cascade of problems: time wasted on manual processes instead of strategic analysis, blind spots from inability to model multiple scenarios, delayed decisions due to slow processing and scenario evaluation, inaccurate forecasts leading to costly operational mistakes, and competitive disadvantage as more agile competitors make faster and better-informed decisions.

Adopting a Better Tool for the Job: Four Criteria for Agile Scenario Planning

OEMs have much to consider and many pain points to address, from affordability and market shifts to supply chain uncertainties and tariffs. Navigating this complexity in 2026 and beyond will require them to fundamentally rethink their approach to scenario planning, moving beyond traditional top-down forecasting and toward methodologies that support both top-down and bottom-up analysis. As organizations evaluate scenario planning solutions, these four criteria should guide their selection.



CRITERION 1:

Data Depth and Breadth

Effective scenario planning requires highly accurate and comprehensive data, insights, and up-to-date vehicle forecasts. Planners need access to dozens of attributes including engines, fuel types, powertrains, and more, allowing them to explore multiple scenarios for sales and production planning, forecasting, and impact analysis.

The data foundation must be robust enough to support adjustments based on various assumptions while maintaining consistency across all scenarios. Without comprehensive, granular and reliable data, even the most sophisticated analytical tools will produce unreliable results.

CRITERION 2:

Tailored Analysis Functionality

Scenario planning tools must provide the ability to evaluate data from the lowest level of granularity to high-level executive summaries, and they need to process massive amounts of data while allowing users to manipulate multiple scenarios that can be saved for future adjustments.

Advanced tools should leverage machine learning, AI, and business logic-driven algorithms to accelerate analysis and surface insights that might not be immediately apparent through manual review.

CRITERION 3:

Real-Time Insights and Simultaneous Scenario Evaluation

The pace of change in the automotive industry demands real-time analytical capabilities. Modern scenario planning solutions must empower enhanced long-term strategic planning for demand, volume, and sales while enabling the identification of market investment opportunities, evaluation of consumer behaviors, and assessment of product mix implications.

Crucially, planners must be able to evaluate multiple scenarios simultaneously rather than sequentially. This capability dramatically accelerates the planning process and enables more sophisticated comparative analysis, allowing organizations to understand the range of possible outcomes and make more robust strategic decisions.

CRITERION 4:

Optimized, Intuitive User Experience

Even the most powerful analytical capabilities are worthless if planners cannot access them efficiently. Effective scenario planning tools must present data within a single, highly intuitive visual dashboard that allows graphical editing for quick evaluations.

The user experience for these tools should minimize training requirements and allow planners to focus on strategic analysis rather than technical tool management. Given resource constraints at most OEMs, solutions that require extensive onboarding or IT support create adoption barriers that undermine their potential value.

Additionally, robust security features are essential. Solutions must protect proprietary and sensitive information while still enabling the collaboration and data sharing necessary for effective planning across global organizations.



Topics for consideration:

1. How easily and quickly are you able to evaluate your assumptions and generate insights for your strategies?
2. Are you able to make adjustments easily?
3. Is the necessary data current or do you need to upload refreshed data manually?

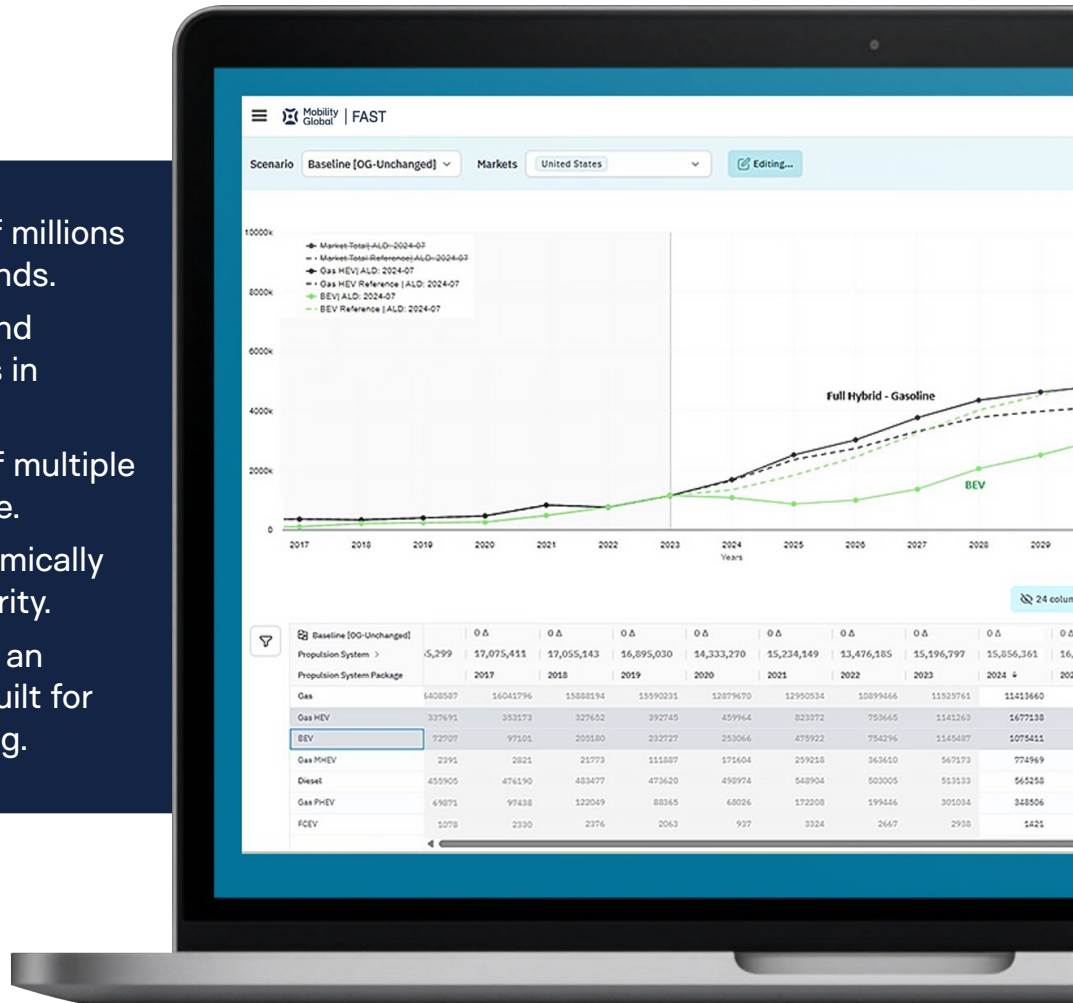
Mobility Global's FAST Solution

The modern, volatile auto industry has rendered traditional planning approaches insufficient. Organizations that continue relying on outdated tools risk making strategic errors with consequences measured in billions of dollars.

Mobility Global's Forecast Adjustment and Simulation Tool (FAST) is an advanced, secure, web-based scenario planning tool that enables OEMs to quickly model different market assumptions in ad hoc forecasting and strategic planning.

By combining AI-driven modelling with unmatched processing speed, FAST allows planners to:

- Calculate hundreds of millions of data points in seconds.
- Adjust assumptions and simulate market shifts in real time.
- Compare outcomes of multiple scenarios side-by-side.
- Analyze demand dynamically at any level of granularity.
- Cut manual work with an intuitive dashboard, built for easy review and editing.



FAST provides access to the gold standard in demand forecast data, enabling analysis down to the powertrain level. Users can simultaneously analyze multiple assumptions, quickly adjust data in real-time, and save explorations to maintain consistency for easy future adjustment—all within one secure platform.

Conclusion

As organizations evaluate their scenario planning capabilities, the four criteria outlined in this whitepaper provide a framework for assessment: a comprehensive data foundation, tailored analysis functionality, real-time multi-scenario evaluation, and intuitive user experience with robust security. Solutions that meet these criteria enable confident decision-making in an uncertain environment.

The future belongs to OEMs that embrace agile scenario planning capabilities—those willing to move beyond quarterly planning cycles toward on-demand strategic analysis. The tools exist to support this transformation. The question is whether organizations will adopt them before competitive pressures make the decision for them.

Learn More

To explore how advanced scenario planning capabilities can transform your organization's strategic planning processes, schedule a demo to see FAST in action.

[VISIT: FAST – SMARTER AUTOMOTIVE MARKET FORECAST PLANNING MOBILITY GLOBAL](#)



About Mobility Global

Mobility Global helps billions of people and businesses that build, sell, buy, and maintain vehicles make vital mobility decisions with confidence.

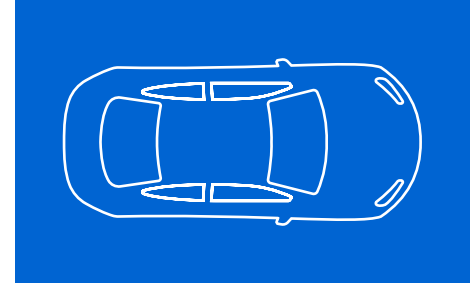
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We have three divisions, each built to help our customers win:

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- **Sales Solutions** including trusted offerings like automotiveMastermind and Polk data help dealers and OEMs understand markets, find opportunities, and connect with the right customers at the right time.
- **CARFAX** gives millions of consumers the trusted information they need to buy, sell, and take care of their cars with confidence.

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