Cyber Threats and Market Volatility Signal New Reality for Global Automotive Industry

Secure, trusted data collaboration is becoming a prerequisite condition of trade says Catena-X

- Eight of the world's top ten automotive suppliers are live in the Catena-X ecosystem, giving the association a clear view of the reality of fragmented data exchange across all tiers
- Catena-X highlights three signals for 2026 as market-access evidence, cost-to-comply, and software traceability move into core operations
- The association says trusted data collaboration is becoming a strategic necessity as the industry adapts to tougher proof requirements, rising compliance cost, and software-driven risk
- Shift is set to change how the industry trades, competes, and manages risk
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Berlin, Germany, 17 February 2026 - Catena-X Automotive Network e.V., the industry's self-governed ecosystem for securely exchanging sovereign data, is outlining three new realities it sees for 2026, based on its cross-industry view of data flows across the entire global automotive value chain.

Data is shifting from a back-office task to a board-level priority as it becomes essential operational infrastructure. Proof requirements are tightening market access, data overhead is rising and software traceability is now central to risk exposure. In an increasingly software-defined value chain, this shift is set to change how the industry trades, competes, and manages risk.
The automotive sector has spent decades trying to optimise physical supply chains in response to disruption, but Catena-X exists because today's data ecosystem is still fragmented and opaque. Critical information moves through spreadsheets, PDFs and one-off IT integrations, creating cost and delays – especially when disruption hits.
Catena-X enables secure, interoperable, trusted data exchange across companies at all levels within the supply chain while protecting data sovereignty, guided by Catena-X standards. Adoption is scaling as major OEMs in Europe increasingly mandate Catena-X integration into supplier contracts. Eight of the world's top ten automotive suppliers are live in the ecosystem, and participants can connect in one or two weeks and see savings within the first month. The EU Digital Battery Passport is a major driver of product-level proof requirements, and Catena-X already provides infrastructure – supported by certified solutions – designed to make compliance more efficient while creating real business value.

Hanno Focken, Managing Director, Activation, Governance and Operations, Catena-X, said:
"We are seeing a major shift in what the industry is being asked to prove. Data is becoming a condition of trade and a real cost-to-serve. At the same time, cyber incidents are increasingly becoming a product recall risk. Work that used to sit in the background is now affecting market access and margins. Catena-X exists to make trusted interoperable exchange practical across every tier of the supply chain, while protecting data sovereignty."
The global automotive industry is entering a phase where information bottlenecks can be as disruptive as parts shortages. Fragmented data exchange is now a systemic risk. Competitiveness will increasingly depend on how effectively companies can collaborate across organisational and regional boundaries while protecting data sovereignty. Against that backdrop, Catena-X highlights three signals for 2026 that are driving data work into core operations.

Data becomes a de facto trade barrier

In 2026 the trade equation is tightening. Tariff regimes, carbon border measures such as the Carbon Border Adjustment Mechanism (CBAM) and product-level carbon proof requirements, the EU Digital Battery Passport and widening due diligence obligations are all increasing demand for trusted product and supply chain evidence. In this landscape, data fragmentation becomes a de facto trade barrier. If evidence cannot be produced quickly and consistently, companies face delays, higher cost-to-serve and – in some cases – exclusion from contracts or markets.

Catena-X data standards are designed to make evidence reusable across partners, instead of recreating documentation and integrations for every customer and every market. That matters most in Tier 2 and Tier 3, where readiness is uneven, and where one weak link can block an otherwise compliant Tier 1 or OEM programme. This is why the association has focussed on making Catena-X as easy as possible to connect to across tiers, in as little as two weeks, so compliance data behaves more like infrastructure and less like friction.

Data starts competing with major cost centres

Against this regulatory backdrop, data rapidly becomes a cost centre competing against R&D budgets, IP acquisition and margin flexibility. The cost question is now unavoidable, and CFOs' attention is increasingly shifting toward data compliance as a cost-to-serve that affects tenders and market access.

A simple modelling example illustrates the margin risk. For a supplier with EUR 1 billion in revenue, 0.05 percent in compliance costs equates to EUR 500,000 per year. If that burden rises toward 2 percent as requirements multiply, it becomes EUR 20 million per year: a significant and entirely avoidable cost.

The cost driver is duplication, repeated manual reporting and bespoke IT integrations rebuilt across customers, regions and regulations. Product Carbon Footprint (PCF) calculations are one example. Catena-X's PCF toolkit is designed to make sustainability data usable across companies, reducing rework and shortening reporting cycles. Catena-X users point to PCF calculations being up to five times more efficient than legacy approaches, with cost reductions of more than EUR 10,000 per calculation, because standardised inputs can be reused rather than rebuilding processes from scratch.

Cybersecurity recalls become the new faulty part

In 2026, Cybersecurity risks linked to untraceable software may overtake faulty components as the main trigger for automotive recalls, and the association sees this risk moving beyond security teams. As vehicles become more software-defined and supply chains more interconnected, cybersecurity becomes product exposure because incidents can translate directly into recall risk.

A key constraint is traceability. Many organisations cannot rapidly answer what software is in which vehicles, in which version, who it was supplied by and with what downstream dependencies. A single component can contain code from multiple parties, some of them black box.

In that context, Catena-X highlights software lineage and component provenance, including the use of a Software Bill of Materials (SBOM), as essential for fast triage and containment. The practical benefit is speed and visibility because by making software traceability shareable, trusted, and usable across every tier, Catena-X users can coordinate their responses faster, and therefore reduce the disruption caused.

With adoption accelerating, Catena-X is seeing the industry align around a shared reality: trusted, interoperable data is becoming essential infrastructure, and collaboration is now a strategic necessity. The association is urging OEMs, suppliers, and solution providers to prioritise onboarding and implementation so that compliance, cyber resilience, and digitalisation can function across tiers, not just within individual organisations.

About Catena-X

Catena-X is the first end-to-end, collaborative and open data ecosystem for the automotive industry, connecting players along the value chain. The Catena-X association provides neutral governance to enable standardised,

interoperable and data-sovereign collaboration and support efficiency, innovation and compliance across the entire data ecosystem. Catena-X is Gaia-X compliant and also serves as a model for Manufacturing-X initiatives, supporting the development of standardised data ecosystems in other industries. Founded in 2021, the association has hubs in the USA, China, Spain, Sweden and France and more than 300 individuals work in more than 40 expert groups to develop future standards.