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1. Introduction

The report examines the macro marketing environment as a strategic environment, as a strategic dimension of marketing investment, with reference to the global electric vehicle (EV) industry. The EV sector is among the most transformative and contested markets of the 21st century, characterized by rapid technological innovation, regulatory flux, and intense competitive rivalry. Global Electric car sales have topped 17 million in 2024, which is rising by more than 25% (IEA, 2025a).

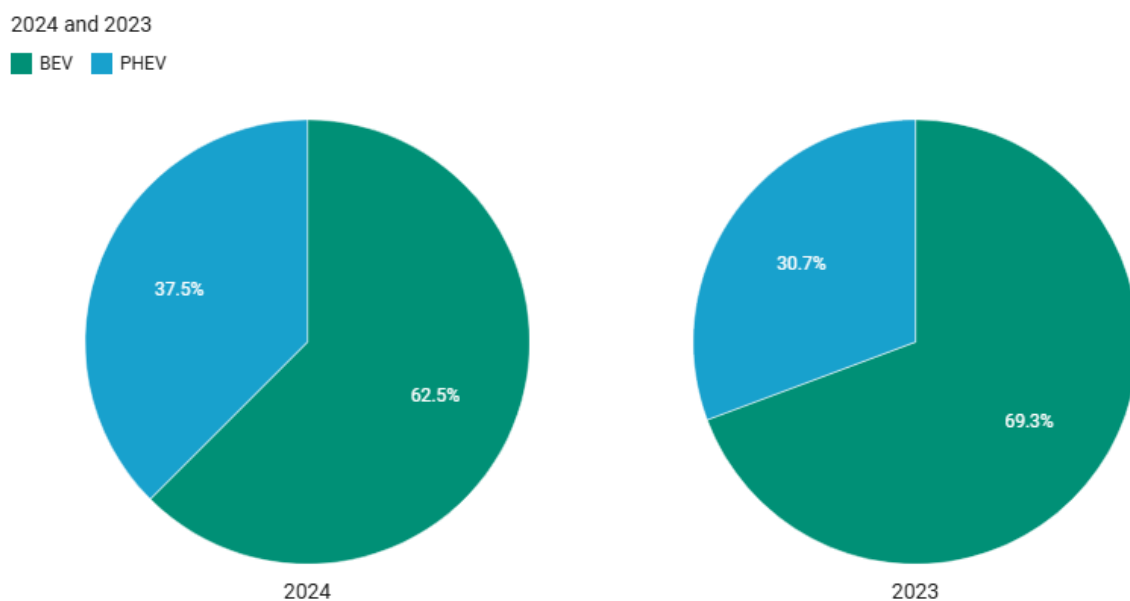


Figure 1: Global EV Market

(Source: Autovista24, 2025)

The highest proportion of the EV market in 2024 was dominated by battery electric vehicles (BEVs), making 62.5% of the sales, with PHEVs taking 37.5 percent (Autovista24, 2025). This is an observation of the consolidation of climate demands, government intervention by policy, and the shift in consumer preferences across key automotive economies.

Within this landscape, Tesla Inc. and BYD Co. Ltd. present a compelling case study in pioneering and follower dynamics. Tesla was founded in 2003 and delivered its first commercial product in 2008, establishing a modern EV paradigm and continuing to define technological and infrastructure benchmarks (Tesla, 2025). BYD was founded in 1994 as a battery manufacturer and eventually transitioned into vehicle

manufacturing, becoming the leading seller of 8 million new energy vehicles (NEVs) (BYD, 2026).

2. Task 1: Critical Analysis of the Macro Marketing Environment

2.1 Macro Marketing Environment

The PESTLE model concentrates on the Political, Economic, Social, Technological, Legal, and Environmental aspects, which offer a systematic process of evaluating the external forces, which influence the strategic nature of an organisation (Kotler and Keller, 2022). In the EV sector, not all macro factors carry the same strategic weight, as their significance varies considerably by geography, business model, and competitive positioning.

2.2 Analysis of Macro Factor 1: Political/Regulatory - Governmental Regulatory Policy and Subsidies

2.2.1 Impact on the Pioneer Organisation - Tesla

The government's policy has given Tesla both a great opportunity and a tangible limitation. In August 2022, the US Inflation Reduction Act (IRA) was enacted that offers a meaningful policy tailwind to domestic EV manufacturers by including up to 7,500 vehicle consumer tax credits based on qualifying vehicles, and removing the 200,000-unit limit on manufacturer credits, previously rendering Tesla ineligible to receive federal credits (Levasseur, 2025). Tesla's reinstated eligibility since January 2023 has been a direct competitive edge, lowering the effective purchase price of eligible models and triggering mass consumer demand (Bettle, 2024).

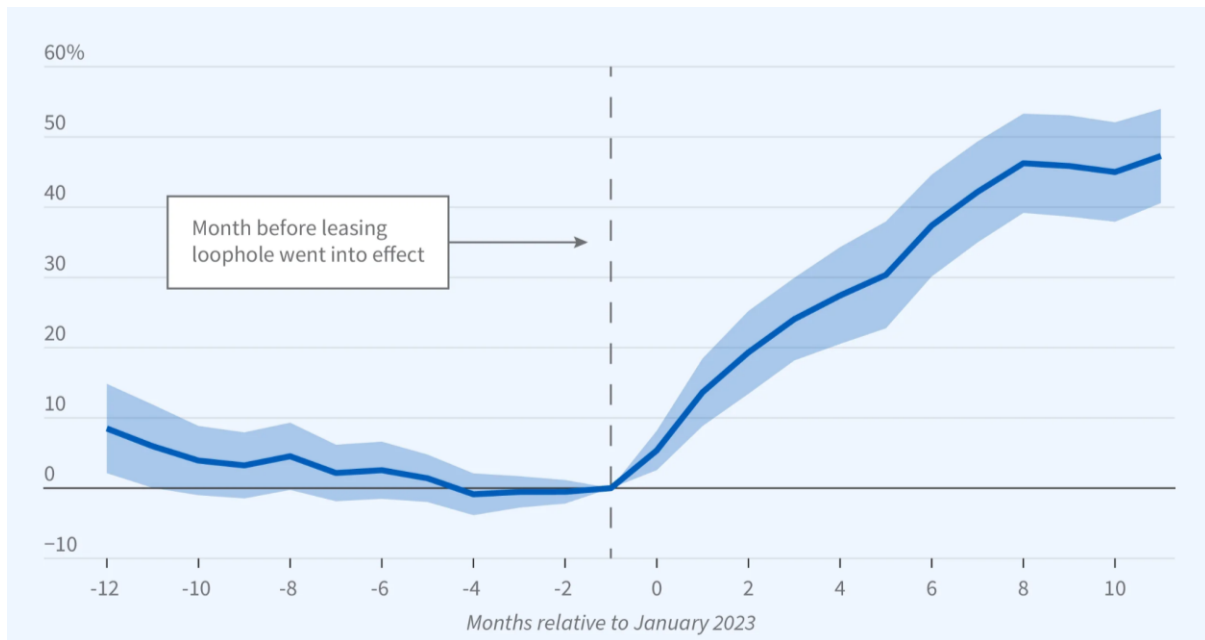


Figure 2: Inflation Reduction Act and Lease Share of EVs Excluded from Consumer Tax Credits

(Source: NBER, 2025)

According to estimates by the National Bureau of Economic Research (2025), new EV registrations in the US would have decreased by about 27% in the absence of the IRA credits, underscoring the demand-generating importance of these policy tools (NBER, 2025).

Tesla has not been enjoying the benefits of IRA, though without conditions. The provisions of the Foreign Entity of Concern (FEOC) in the legislation, which were tightened in 2024, have made the Tesla Model 3 Rear-Wheel Drive and Long Range ineligible for the full tax credit since January 2024 (Visconti, 2023). Using battery components produced in Chinese supplier chains, that is, those related to CATL (IEA, 2025b). In Europe, another asymmetric effect on Tesla was the EU countervailing duties of up to 9% on vehicles produced in China and exported to Europe (The Guardian, 2024).

2.2.2 Impact on the Follower Organisation - BYD

In the case of BYD, the government's regulatory policy has been a two-sided macro force. In the Chinese context, BYD has enjoyed strong support from the Chinese state. Direct government subsidies to the company amounted to about €3.4 billion between 2018 and 2022, with the bulk received in 2022 (Walt, 2025). Moreover, the NEV

purchase tax exemption in China, which provides a saving of up to RMB 30,000 per car (Reuters, 2023). It is expected to last until 2025, has supported domestic purchasing, and allowed BYD to compete at large-scale prices. This state-subsidized cost advantage has contributed to BYD's 4.27 million NEVs sold in 2024, a 41.26% year-on-year increase (Latam Mobility, 2024).

In the global market, however, BYD has been facing more hostile regulatory conditions. An anti-subsidy probe revealed that the European Commission imposed countervailing duties of up to 35.3% on Chinese-made BEVs in October 2024, with BYD receiving an additional duty rate of 17.4% over the standard 10% EU import tariff (Cleary Trade Watch, 2024). In May 2024, the US administration introduced a 100% tariff on Chinese EVs, which will practically eliminate BYD as a competitor in the second-largest EV market worldwide in the near future (Elliott, 2024).

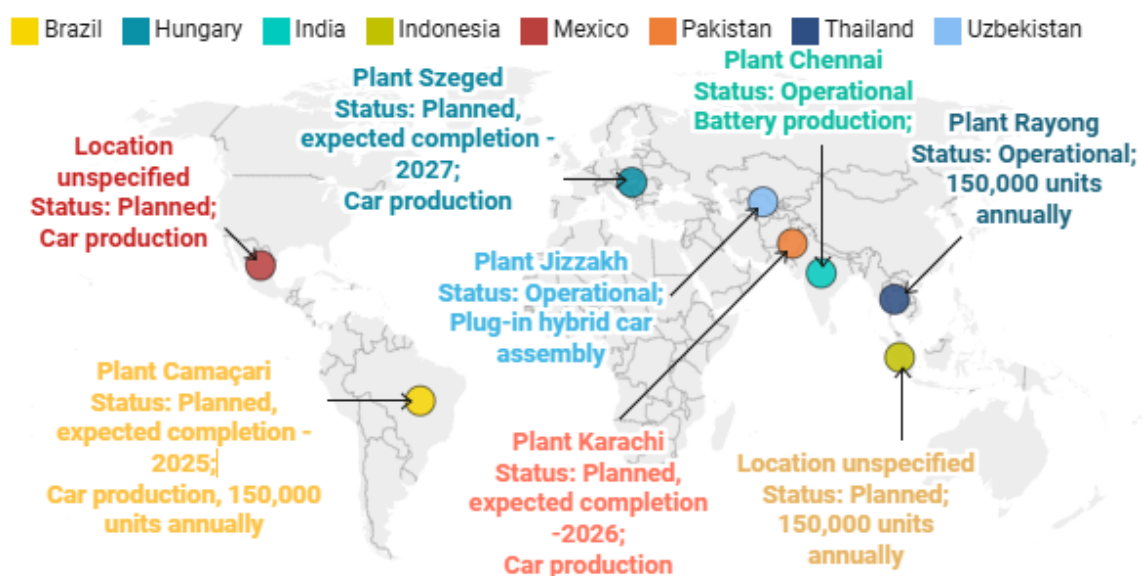


Figure 3: BYD's Global Production Network

(Source: Automotive Manufacturing Solutions, 2025)

These aggregate trade barriers pose a tangible risk to BYD's international expansion goals, limiting its ability to exploit its home-based cost base in export markets. However, BYD's strategic response, such as the opening of a new factory in Szegeed, Hungary, in 2024, is expected to yield an annual output of 150,000 vehicles (Automotive Manufacturing Solutions, 2025). In addition, initiating production in Thailand in July 2024 demonstrates that the company can adapt to its regulatory environment (Automotive Manufacturing Solutions, 2025).

2.3 Analysis of Macro Factor 2: Technological - Battery Technology and Charging Infrastructure

2.3.1 Impact on the Pioneer Organisation - Tesla

Tesla has also pursued a vertically integrated battery approach by developing its own 4680 cylindrical cell programme, which is produced at Gigafactory Texas. By June 2024, Tesla had already manufactured more than 50 million 4680 cells, and daily production rates had increased to more than 126,000 cells per day, up from 85,470 in mid-2023 (Kane, 2024). Notably, towards the end of 2024, internally produced 4680 cells were the least expensive per kWh at Tesla, in a competition with external suppliers, including Panasonic and LG Energy Solution (Visconti, 2025). It is also expected that this trend of cost minimization may persist with the estimates showing that 30% of the savings are as a result of the implementation of the dry electrode manufacturing process (Jin *et al.* 2024).

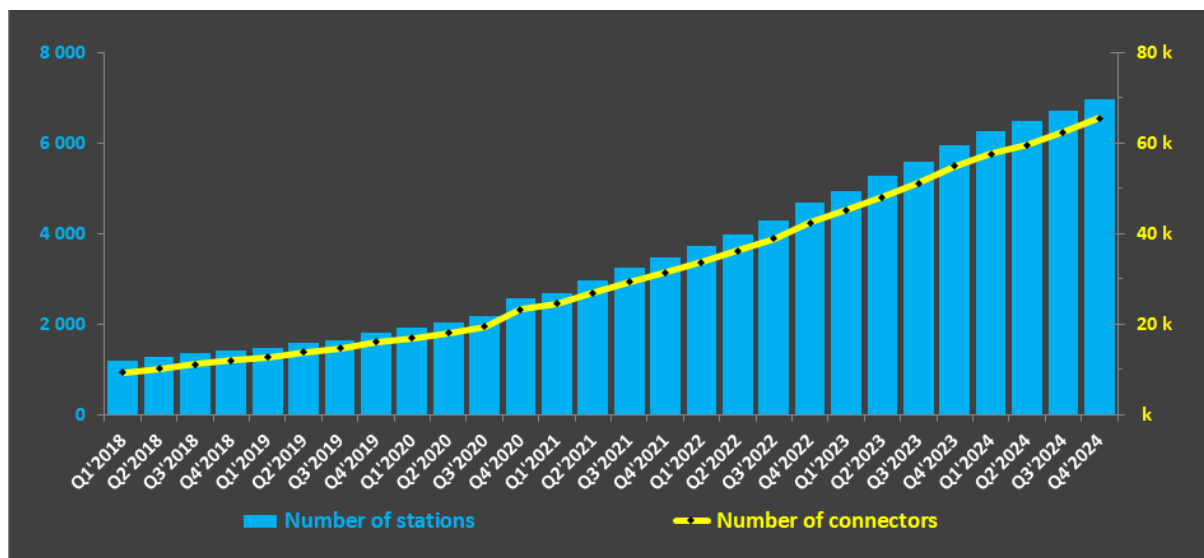


Figure 4: Number of Tesla Superchargers

(Source: Kane, 2025)

Another similar as well as likewise imperative technological ability at Tesla is its Supercharger network. As of Q4 2024, the network will include about 6,975 stations and 65,495 individual connectors worldwide, representing 17% and 19% growth, respectively (Kane, 2025). As a strategic move, Tesla began accepting non-Tesla vehicles into this network in 2023-2024 and adopted its North American Charging Standard (NACS) connector as the new industry standard. Therefore, the proprietary

infrastructure of Tesla would be turned into an industry platform by 2024 and major manufacturers like Ford, General Motors, Rivian, and BMW would be converted into NACS adopters - another significant source of network externalities and revenue stream (Driivz, 2023).

2.3.2 Impact on the Follower Organisation - BYD

The BYD battery technology policy can be seen as a rational variant of vertical integration to the fullest. Its proprietary Blade Battery is based on the Lithium iron phosphate (LFP) chemistry and produced by its subsidiary FinDreams Battery Co. is more thermally stable, has a longer cycle duration, and costs less than typical lithium-ion batteries (Samora, 2024). BYD has an investment in R&D of 54.2billion Yuan and has a cash reserve of 154.9billion Yuan and net operating cash flow of 133.5billion Yuan (BYD, 2024a).

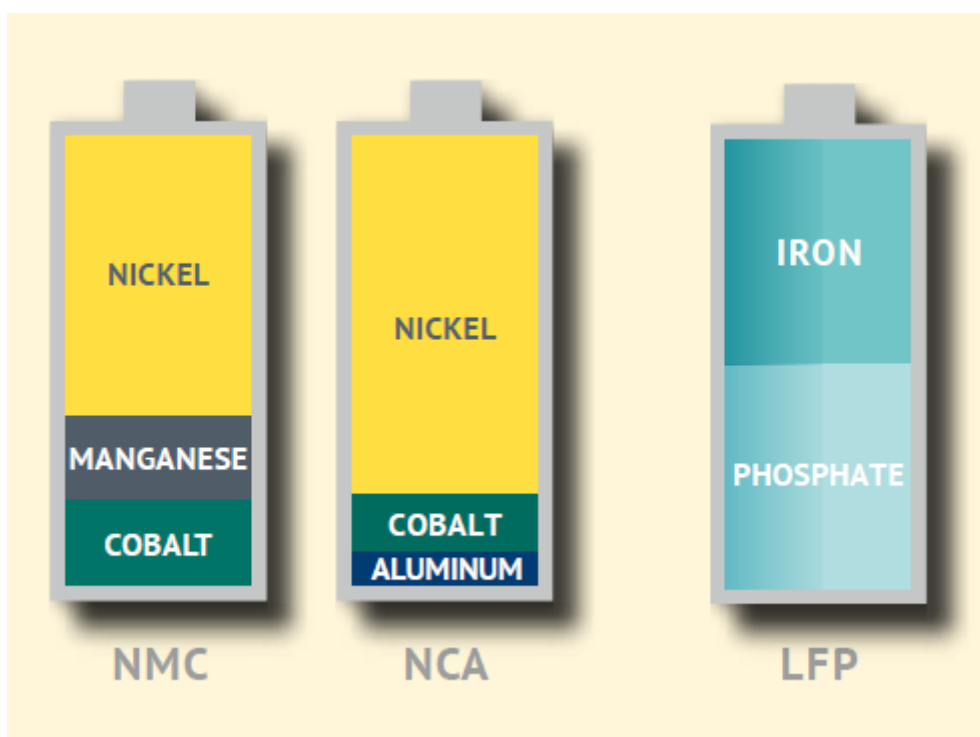


Figure 5: Two Battery Families

(Source: Nickel Institute, 2026)

The Blade Battery is a source of competitive adaptability and is an opportunity from a technological aspect. Cost efficiency, through in-house manufacturing and LFP chemistry, which eschews the use of nickel and cobalt, costly in NMC cells, permits BYD to compete with pricing across various car segments at the same time, between

low-end and high-end (Nickel Institute, 2026). It also pledged in 2025 to have ultra-fast 1,000-volt flash chargers that can charge compatible vehicles to 400 kilometres of range within around five minutes (BYD, 2025).

But BYD's weakness compared to others is its limited charging infrastructure outside China. By comparison, Tesla has an internationally established, proprietary network comprising approximately 65,500 connectors, whereas BYD has an underdeveloped global charging network (Kane, 2025). This gap is one of the structural barriers to mass-market adoption in Europe and Southeast Asia, where range anxiety and access to charging are among the primary consumer concerns.

3. Task 2: Strategic Responses of Pioneering and Follower Organisations

3.1 Pioneering Organisation's Strategic Responses - Tesla

The response that Tesla has developed to address macro-environmental pressures in Task 1 can be seen in the context of the Generic Strategies framework presented by Porter, which recognizes three major competitive advantage strategies: cost leadership, differentiation, and focus (Acar, 2024). Tesla's strategy can best be described as broad differentiation, focusing on a broad market. With products and ecosystems that are unique enough to fetch a price premium, and that ensure customer loyalty that is not dependent on cost competition.

Tesla differentiation is a multidimensional process deeply embedded in its product, technology, and infrastructure. Tesla has responded to the IRA's supply chain requirements by accelerating the localisation of its domestic battery programme, with the 4680 cell expected to reach the lowest possible cost-per-kWh by the end of 2024 (Singh, 2025). Responding both to the risk of ineligibility under the FEOC policy and to its own technological differentiation (Donnelly, 2023). This is what Porter describes as value chain integration as a source of sustainable differentiation. Tesla is not just a seller of vehicles; it governs the entire ecosystem, from the chemistry of battery cells to the consumer experience of charging.



Figure 6: Tesla's North American Charging Standard (NACS)

(Source: EV Charging Stations, 2023)

Tesla's strategic launch of the Supercharger network can serve as an example of platform-level differentiation. Tesla became an industry infrastructure layer using NACS as the North American standard and remaining agreements with Ford, GM, BMW, and others (EV Charging Stations, 2023). This action has a twofold strategic purpose: it will bring in new third-party income by charging not performed by Tesla. It will also strengthen NACS as the new standard, creating lock-in effects that will further increase Tesla's infrastructure advantage over time.

However, it is worth noting that there is increasing pressure on Tesla's differentiation strategy. The recorded annual decline in deliveries in 2024, when sales will decrease to 1.79 million units from 1.81 million in 2023, combined with a loss of US market share below 50% (PBS, 2025). It implies that the differentiation premium introduced by Tesla is under increasing pressure from lower-cost, technologically competitive competitors. Porter cautions that differentiation strategies are susceptible to being overtaken by competitors with an equal or cheaper value, vision, and BYD is gradually becoming. Tesla's introduction of cheaper models and further investment in Full Self-Driving (FSD) and AI-based autonomy are strategic moves in its positioning (Tesla, 2026). It seeks to create a greater qualitative distance from competitors by advancing technology rather than competing on price.

Tesla has a strong differentiation strategy in technology-intensive and infrastructure markets, which are particularly sensitive, as critically assessed. Nevertheless, it faces structural constraints in price-sensitive emerging markets, where BYD's cost leadership is highest, suggesting that broad differentiation might be insufficient to maintain Tesla's global leadership without further investment in innovation.

3.2 Follower Organisation's Strategic Responses - BYD

The strategic response of BYD to macro-environmental forces can be best examined through the Ansoff Growth Matrix, which plots strategies of strategic growth in four quadrants: market penetration, product development, market development, and diversification (De *et al.* 2024). The multi-front approach to regulatory barriers and rivalry of BYD speaks to a calculated, simultaneous enterprise across multiple Ansoff quadrants, which reflects the strategic skills of an up-and-coming competitor.

BYD has also actively pursued market share in the domestic market, where it has found its way through aggressive pricing in the NEV market in China, due to the affordability of the Blade Battery and the government subsidies.

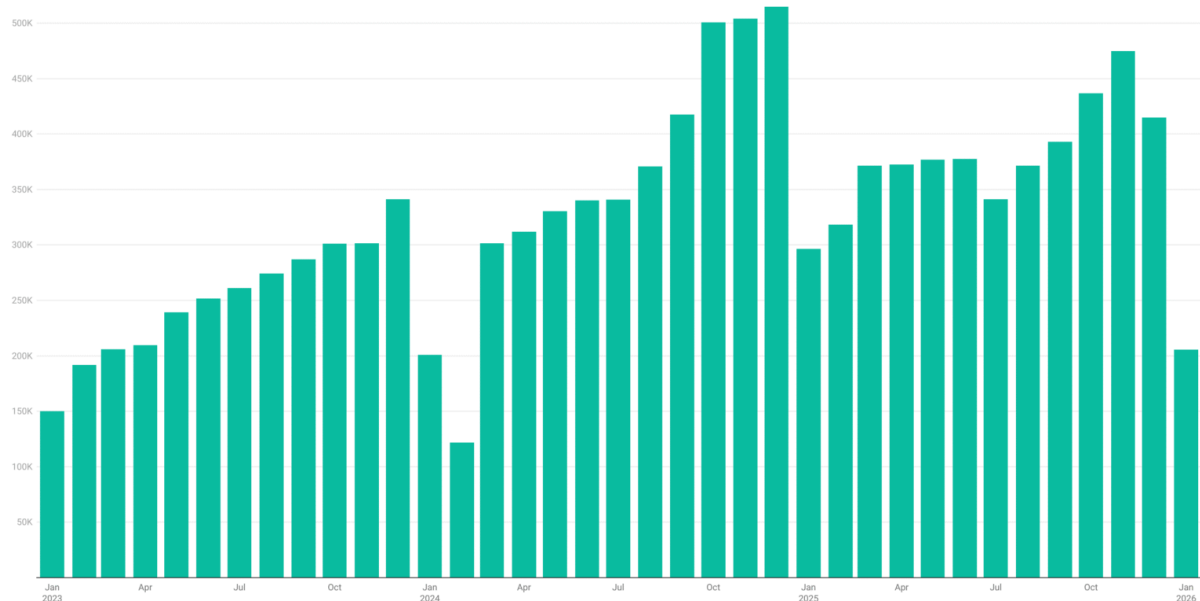


Figure 7: BYD New Energy Vehicle Sales

(Source: Shahan, 2026)

The combination of BEVs, PHEVs, and NEVs overall saw deliveries down 50.5% month over month and 30.7% year over year (Shahan, 2026). It models in a variety of

price ranges, from the entry-level Seagull to the high-end Yangwang U8, a strategy Tesla could not replicate with a consciously limited five-model portfolio (BYD, 2023).

By 2023, BYD had entered 60 new markets worldwide, including the UK, Germany, Brazil, and Thailand (EVBoosters, 2025). In July 2024, it established its first wholly owned foreign production plant in Rayong, Thailand with a capacity of 150,000 vehicles annually, and was expected to hire 10,000 employees (BYD, 2024b). In Europe, BYD opened a plant in Szeged, Hungary, in 2024, which would avoid EU tariffs by manufacturing vehicles in Hungary and thereby qualify as a regular EU trade partner. This localised production plan reflects a strategy similar to that used by Japanese and Korean car manufacturers over the past decades and a sophisticated way of adjusting to the protectionist regulatory environment described in Task 1.

BYD too has been putting attention on product development with the second generation Blade Battery and ultra-fast flash-charging architecture being some of the most significant products additions (BYD, 2026). To enhance technological differentiation and compete on an equal footing with Tesla's charging infrastructure advantage in global markets.

An analytical assessment of the Ansoff BYD strategy can highlight its strengths and the risks it entails. The concurrent market, product, and market penetration demands a lot of capital, operational, and managerial requirements in the organisation (Muchiri and Kinyua, 2025). In line with Ansoff, market development and diversification is riskier than the penetration strategies since organisations must operate in new competitive, regulatory, and cultural environments. The dependence of BYD on the Chinese system of subsidies to finance its global growth presents a structural weakness: as Western markets introduce tariffs and FEOC limits its access, the transferability of its local cost leadership declines (CMR, 2024). In addition, BYD lacks brand equity in high-end Western markets, and consumer awareness and post-sale support are at earlier stages than Tesla's in major markets such as the United States and Germany.

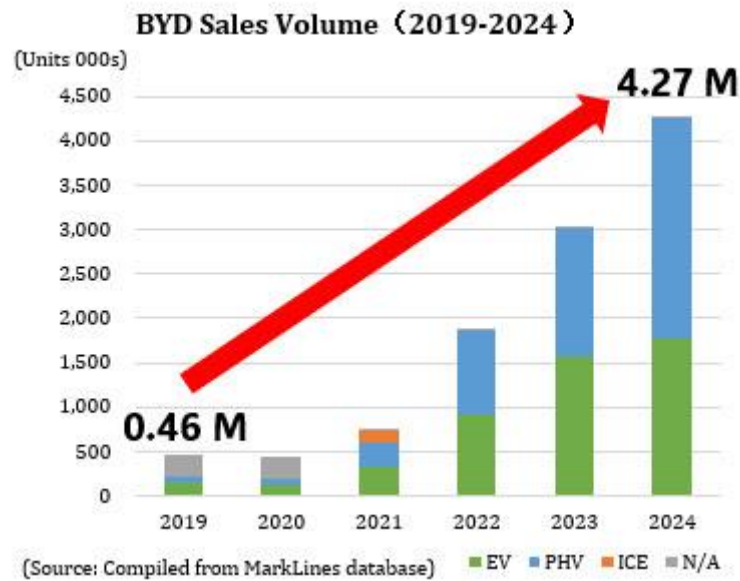


Figure 8: BYD Sales Volume

(Source: MarkLines, 2025)

Nevertheless, there is a tendency of BYD selling 4.27 million of NEV in 2024 with the annual rate of increase of foreign sales of 71.9% (MarkLines, 2025). It demonstrates that the business process of expansion which is anchored on the Ansoff model is already bearing tangible business effects, regardless of the headwinds in the regulatory environment. Its vertically integrated business approach, such as battery production, car assembly, software creation, and charging systems provide benefits in structures cost and responsiveness, which contribute to sustaining development in the global markets.

4. Conclusion

The report has examined the macro marketing environment of the global EV industry through the lens of Tesla, the pioneer, and BYD, the follower. Tesla's differentiation strategy, analysed through Porter's generic strategies, has enabled it to build competitive advantages in technology, brand equity, and charging infrastructure. On the other hand, the erosion of its US market share and the first annual sales decline in 2024 indicated that broad differentiation alone was insufficient and that, in the market, follower organizations were increasingly able to match the core product attributes at competitive costs. BYD's application of the Ansoff matrix aligns with its development strategy, which focuses on vertical integration and localised

manufacturing, delivering exceptional growth and positioning BYD as the structurally dominant global NEV producer by volume.

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