



THE REDEFINED AMERICAN AUTO INDUSTRY

2015

THE GROWING IMPACT OF INTERNATIONAL
AUTOMAKERS AND DEALERS ON THE U.S. ECONOMY



HERE FOR AMERICA



EXECUTIVE SUMMARY

THE REDEFINED AMERICAN AUTO INDUSTRY, a report produced by the Association of Global Automakers and the American International Automobile Dealers Association, demonstrates the economic impact of international automakers and dealerships on the U.S. economy.

For more than 50 years, investments by international automakers and dealers into U.S. operations have created jobs, strengthened America's manufacturing base, and improved the overall competitiveness of the auto industry.

The landscape of the American auto industry has changed dramatically. International automakers played a key role in helping revitalize U.S. manufacturing and its workforce, and have become the lifeblood of communities across America. Over the past ten years, international automakers' production in the U.S. has increased by 2.4 million vehicles, now accounting for nearly half of all U.S. auto production.¹

International automakers have grown their direct employment at a steady pace. Today, these automakers employ nearly 40 percent of all U.S. auto workers.

Each job created by an international automaker leads to more jobs elsewhere in the economy — a ripple effect that results in more than 1.1 million American jobs.²

Nearly 10,000 dealership franchises create another half a million jobs across the nation.

International dealership franchises are selling more vehicles here than ever before, increasing their market share to 59 percent of all U.S. retail sales.

THE REDEFINED AMERICAN AUTO INDUSTRY showcases the reality of today's vibrant and growing U.S. auto industry. The global array of companies represented in the report all share the same commitment to developing new technologies to provide safer, more efficient vehicles and expanding consumer choice.

IN THIS REPORT YOU WILL FIND 2014 INVESTMENT DATA RELATING TO:

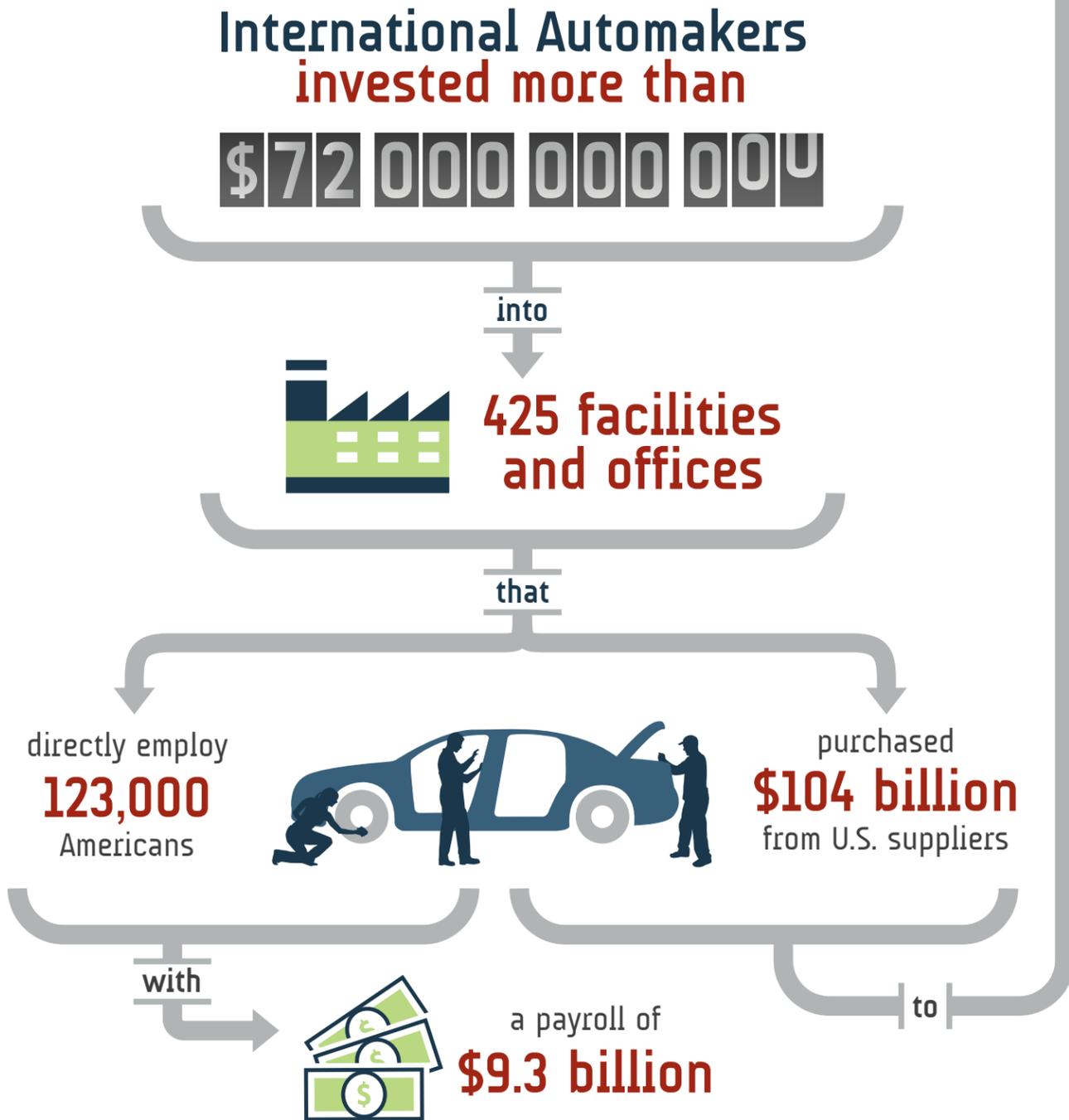
- Capital Investment
- Manufacturing Facilities
- Purchases from U.S. Suppliers
- Vehicle, Engine, and Component Production
- Direct Automaker Employment
- Dealership Employment
- National Payroll
- Vehicle Sales
- Research and Development
- U.S. Exports

¹ Vehicles are made, built, or manufactured in the United States using domestic and globally sourced parts.

² 14.2 U.S. Direct Employment Multiplier for Auto Manufacturing; and 3.3 U.S. Direct Employment Multiplier for Management and Administration of Companies (Non-Manufacturing) were determined by M. R. Press Consulting, LLC using IMPLAN U.S. input-output model for 2013.

NATIONAL DATA SUMMARY

International automakers and dealers have put down deep roots in America over the past 50 years, becoming a significant and integral part of the U.S. economy. Their U.S. operations include research, design, manufacturing, financing, and sales of cars and light trucks.



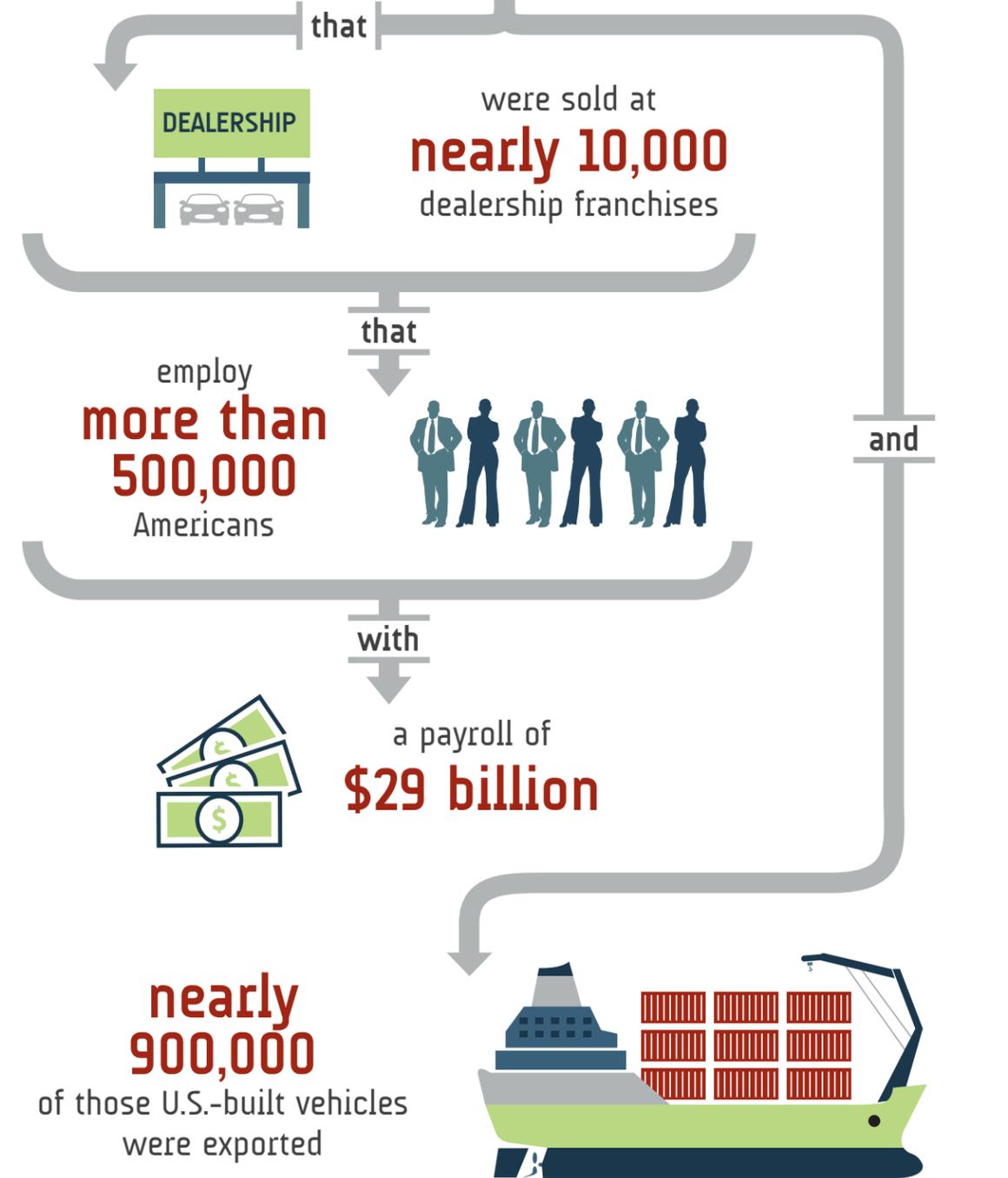
U.S. supplier purchases include parts and materials as well as goods and services.



produce **5.3 million** vehicles



which was **46%** of all U.S. vehicle production



Data based on 2014 calendar year. Capital investment total is cumulative through December 31, 2014.

EMPLOYMENT: From research and development all the way through manufacturing and finance, international automakers are creating American jobs that help grow the U.S. economy. Their direct employment now accounts for nearly 40 percent of the entire U.S. auto industry.

123,000 direct employees
with a payroll of **\$9.3 billion**

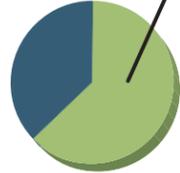


1.1 million jobs
indirectly created throughout the U.S. economy



61% of jobs
are in manufacturing

R&D, finance, and sales operations



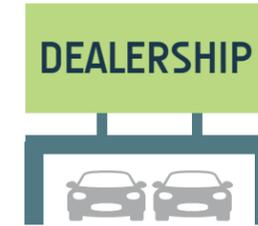
Top 10 states
for employment



DEALERSHIP FRANCHISES: International nameplate automobile dealers are selling more vehicles across the U.S. than ever before, employing more than 500,000 Americans at nearly 10,000 dealership franchises across the country.

Nearly 10,000
dealership franchises
in the U.S.

\$29 billion
payroll



More than 500,000
employed at dealership franchises



Top 10 states by international
dealership franchise employment



R&D: International automakers have 62 research and development centers located across the country. These facilities design some of the most innovative, fuel efficient, and safe vehicles on American roadways.



17 states with
R&D facilities



SALES: Customer preference is accelerating the growth of international automakers' share of U.S. retail vehicle sales. Last year, their U.S. sales increased by 6 percent to reach more than 8 million vehicles, which accounts for more than half of industry sales.

8,039,875
vehicle sales



59% market share
of U.S. vehicle sales



6% increase
in sales year-over-year



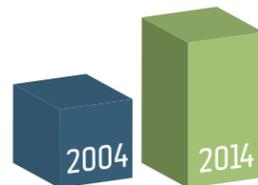
MANUFACTURING: Producing more vehicles than ever before, international automakers' production growth is outpacing others in the auto industry. Over the past decade, their production has increased by 2.4 million vehicles, now accounting for nearly half of all U.S. auto production.



5,282,003
vehicles produced
in the U.S.



85% increase
in production over the past decade



16 states with
manufacturing
facilities



EXPORTS: International automakers exported a record number of American-made automobiles from the U.S. last year. The production of these vehicles and their engines and components takes place at 34 manufacturing facilities in 16 states.

International automakers exported

nearly 900,000
vehicles to
72 countries
around the globe



15% increase
in exports year-over-year

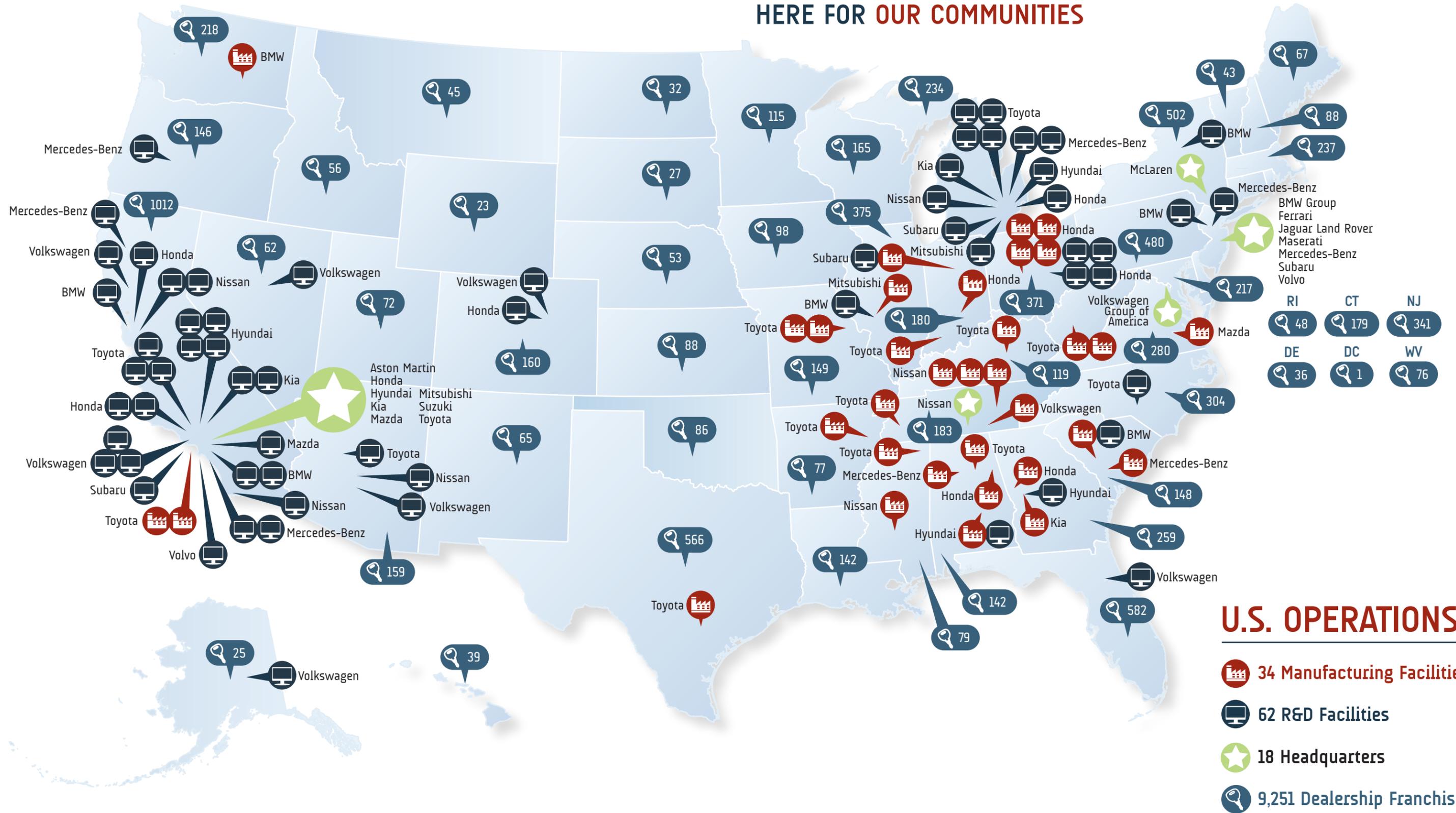


Data based on 2014 calendar year.

Vehicles are made, built, or manufactured in the United States using domestic and globally sourced parts.

INTERNATIONAL AUTOMAKERS' U.S. PRESENCE

HERE FOR A STRONG AMERICAN WORKFORCE
 HERE FOR AMERICAN INNOVATION
 HERE FOR OUR COMMUNITIES

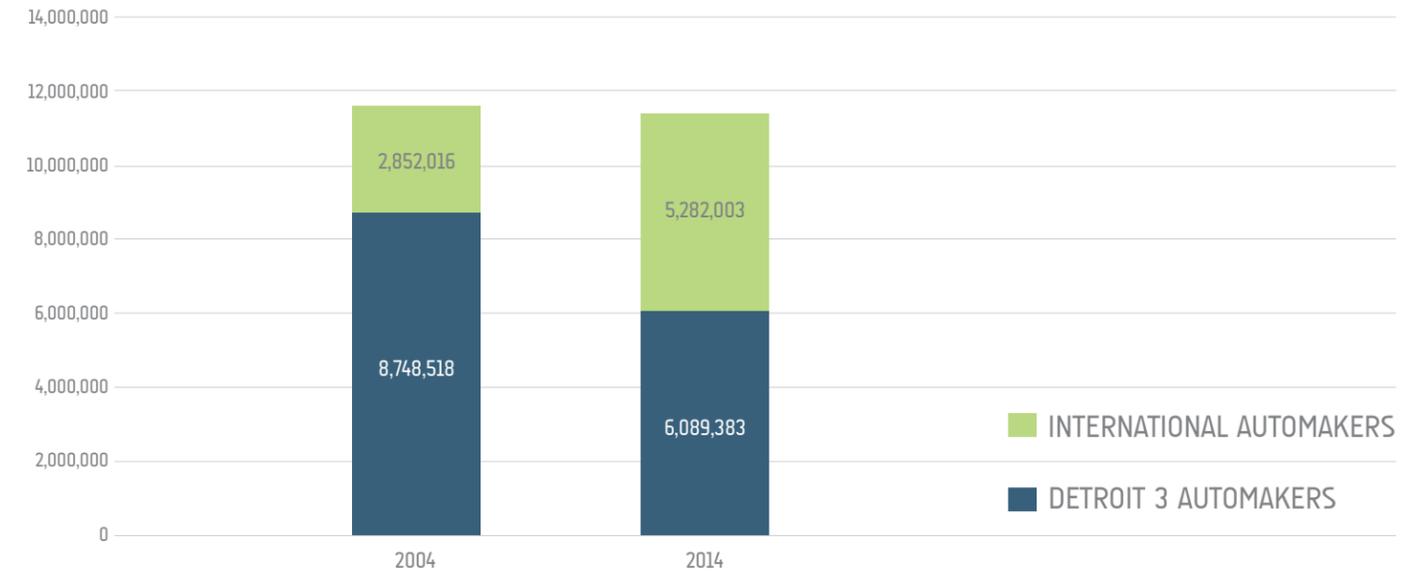


U.S. MANUFACTURING

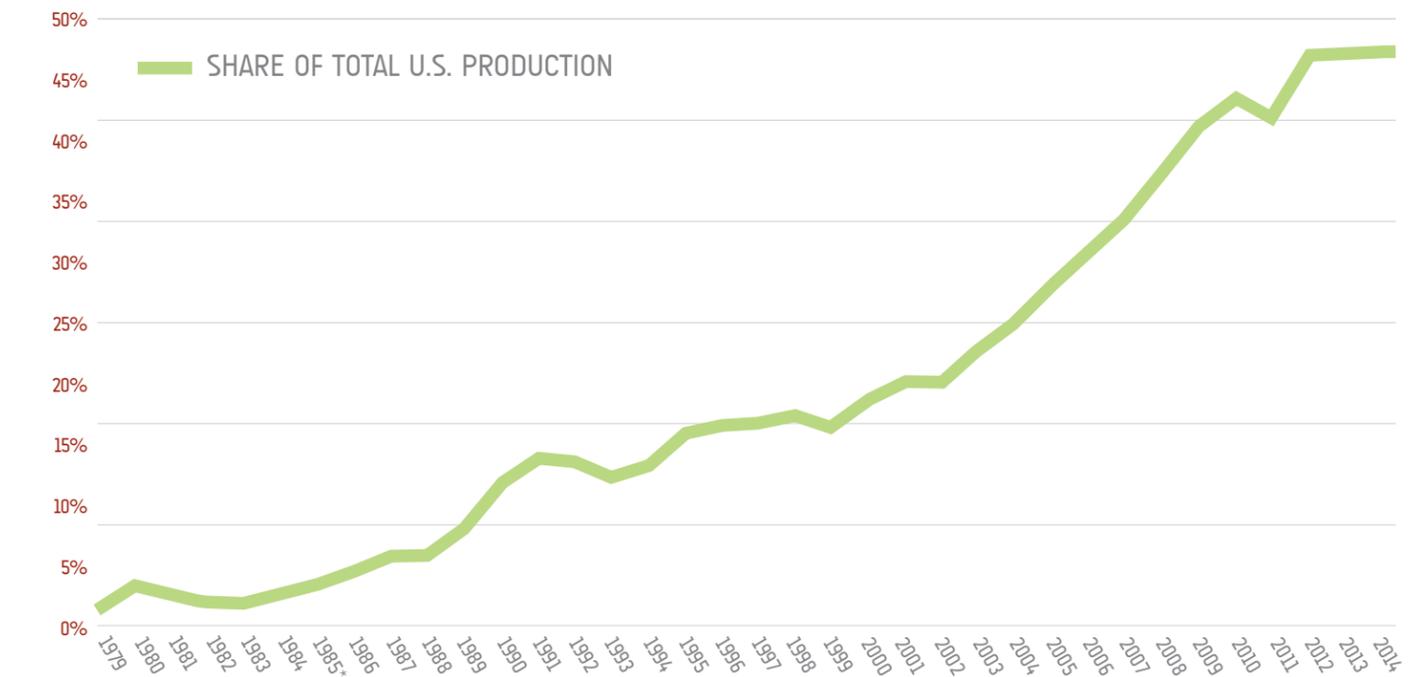
State	Automaker	Facility Name	City	Production Start	Vehicles/Components Produced
Alabama	Honda	Honda Manufacturing of Alabama, LLC	Lincoln	2001	Odyssey, Pilot, Acura MDX, V-6 engines
	Hyundai	Hyundai Motor Manufacturing Alabama	Montgomery	2005	Elantra, Sonata, engines
	Mercedes-Benz	Mercedes-Benz U.S. International, Inc.	Vance	1995	M-, R-, GL-, C-class
	Toyota	Toyota Motor Manufacturing Alabama	Huntsville	2001	4-cylinder, V-6, and V-8 engines
Arkansas	Toyota	Hino Motors Manufacturing U.S.A., Inc.	Marion	2006	Differentials, rear axles, suspension-related parts
California	Toyota	TABC, Inc.	Long Beach	1972	Steering columns, catalytic converters, sub-assemblies
	Toyota	Hino Motors Manufacturing U.S.A., Inc.	Ontario	2004	Axle and knuckle components
Georgia	Honda	Honda Precision Parts of Georgia, LLC	Tallapoosa	2006	Transmissions
	Kia	Kia Motors Manufacturing Georgia	West Point	2009	Optima, Sorento, Hyundai Santa Fe
Illinois	Mitsubishi	Mitsubishi Motor Manufacturing of America	Normal	1998	Outlander Sport
Indiana	Honda	Honda Manufacturing of Indiana, LLC	Greensburg	2008	Civic Hybrid, Civic Natural Gas, Civic Sedan
	Subaru	Subaru of Indiana Automotive, Inc.	Lafayette	1989	Legacy, Outback, Tribeca
	Toyota	Toyota Motor Manufacturing Indiana	Princeton	1996	Highlander, Highlander Hybrid, Sequoia, Sienna
Kentucky	Toyota	Toyota Motor Manufacturing Kentucky	Georgetown	1986	Avalon, Avalon Hybrid, Camry, Camry Hybrid, Venza, 4-cylinder and V-6 engines, powertrain parts
Mississippi	Nissan	Nissan Canton Vehicle Assembly Plant	Canton	2003	Altima, Armada, Frontier, Murano, NV Passenger, NV Cargo, Titan, Xterra
	Toyota	Toyota Motor Manufacturing Mississippi	Blue Springs	2007	Corolla
Missouri	Toyota	Bodine Aluminum, Inc.	St. Louis	1990	Engine brackets, carrier covers
	Toyota	Bodine Aluminum, Inc.	Troy	1990	Cylinder heads, cylinder blocks, automatic transmission parts
Ohio	Honda	Honda of America Manufacturing, Inc. Marysville Auto Plant	Marysville	1979	Accord Coupe, Accord Sedan, Accord Hybrid, Acura ILX, Acura TLX
	Honda	Honda of America Manufacturing, Inc. Anna Engine Plant	Anna	1985	4-cylinder and V-6 engines
	Honda	Honda of America Manufacturing, Inc. East Liberty Auto Plant	East Liberty	1989	Crosstour, CR-V, Acura RDX
	Honda	Honda Transmission Manufacturing of America, Inc.	Russells Point	1996	Transmissions, gears, four-wheel-drive components
South Carolina	BMW	BMW Manufacturing Co.	Greer	1994	X3, X5, X4, X6
	Mercedes-Benz	Daimler Vans Manufacturing, LLC	Charleston	2001	Sprinter
Tennessee	Nissan	Nissan Smyrna Vehicle Assembly Plant and Battery Plant	Smyrna	1983	Altima, LEAF, Maxima, Pathfinder, Rogue, Infiniti QX60, lithium-ion batteries
	Nissan	Nissan Decherd Powertrain Plant	Decherd	1997	Engines
	Nissan	Infiniti Decherd Powertrain Plant	Decherd	2014	Engines
	Toyota	Bodine Aluminum, Inc.	Jackson	2003	Cylinder blocks, automatic transmission parts
Texas	Volkswagen	Volkswagen Chattanooga	Chattanooga	2010	Passat
	Toyota	Toyota Motor Manufacturing Texas	San Antonio	2003	Tacoma, Tundra
Virginia	Mazda	Mazda Remanufacturing and Technical Center	Colonial Heights	2008	Automatic transmissions, RX-7 and RX-8 rotary engines
Washington	BMW	Joint Venture BMW-SGL Carbon	Moses Lake	2011	Ultra-lightweight carbon fiber reinforced plastics
West Virginia	Toyota	Toyota Motor Manufacturing West Virginia	Buffalo	1996	4-cylinder and V-6 engines
	Toyota	Hino Motors Manufacturing U.S.A., Inc.	Williamstown	2007	Truck assembly

U.S. PRODUCTION GROWTH

INTERNATIONAL AUTOMAKERS' PRODUCTION HAS INCREASED BY 2.4 MILLION VEHICLES OVER THE PAST DECADE



INTERNATIONAL AUTOMAKERS' SHARE OF U.S. AUTO PRODUCTION HAS GROWN FROM 1% IN 1979 TO 46% IN 2014.



*Passenger cars only before 1985. Passenger cars and light trucks 1985-2014. Source: Production data from WardsAuto InfoBank for BMW Group, Honda, Hyundai, Kia, Mazda, Mercedes-Benz, Mitsubishi, Nissan, Subaru, Toyota, Volkswagen Group, and Volvo.

U.S. SALES

State	No. of Dealership Franchises	Total Vehicle Retail Sales	Int'l Automakers* Retail Sales	Int'l Automakers Market Share	Green** Vehicle Total Sales	Int'l Automakers Green Vehicle Sales	Int'l Automakers Green Vehicle Market Share
Alabama	142	172,746	97,562	56%	3,195	2,690	84%
Alaska	25	24,006	11,050	46%	461	370	80%
Arizona	159	265,441	159,441	60%	10,848	8,558	79%
Arkansas	77	120,772	52,967	44%	2,207	1,881	85%
California	1012	1,635,172	1,246,637	76%	165,782	131,015	79%
Colorado	160	202,017	125,709	62%	7,781	6,248	80%
Connecticut	179	166,340	120,743	73%	4,821	3,941	82%
Delaware	36	45,259	26,681	59%	1,414	1,092	77%
District of Columbia	1	17,509	13,548	77%	1,308	1,082	83%
Florida	582	1,021,484	713,888	70%	30,061	23,620	79%
Georgia	259	366,174	223,909	61%	19,224	17,145	89%
Hawaii	39	54,107	43,481	80%	3,643	3,170	87%
Idaho	56	50,179	25,337	50%	1,541	1,257	82%
Illinois	375	526,522	292,291	56%	17,850	14,175	79%
Indiana	180	217,301	95,340	44%	6,381	4,918	77%
Iowa	98	121,266	45,109	37%	2,985	2,343	78%
Kansas	88	95,098	45,796	48%	2,836	2,310	81%
Kentucky	119	129,916	67,010	52%	3,578	2,979	83%
Louisiana	142	201,164	99,143	49%	2,145	1,804	84%
Maine	67	60,115	35,206	59%	2,025	1,738	86%
Maryland	217	260,517	177,188	68%	10,134	8,209	81%
Massachusetts	237	322,670	232,428	72%	11,589	9,750	84%
Michigan	234	532,193	96,748	18%	10,448	4,640	44%
Minnesota	115	214,161	101,145	47%	5,616	4,477	80%
Mississippi	79	90,120	47,736	53%	1,445	1,234	85%
Missouri	149	207,783	92,826	45%	5,891	4,543	77%
Montana	45	41,892	16,293	39%	916	778	85%
Nebraska	53	74,546	29,699	40%	1,727	1,344	78%
Nevada	62	116,966	77,787	67%	3,940	3,204	81%
New Hampshire	88	84,108	54,206	64%	2,450	2,061	84%
New Jersey	341	502,561	356,217	71%	10,879	8,593	79%
New Mexico	65	81,111	39,861	49%	2,356	1,931	82%
New York	502	902,911	591,428	66%	23,813	19,979	84%
North Carolina	304	373,032	231,587	62%	12,575	10,444	83%
North Dakota	32	39,651	12,468	31%	429	343	80%
Ohio	371	528,234	263,402	50%	11,879	9,044	76%
Oklahoma	86	156,194	65,532	42%	2,928	2,307	79%
Oregon	146	129,124	86,747	67%	9,217	7,594	82%
Pennsylvania	480	589,983	345,549	59%	13,723	10,850	79%
Rhode Island	48	45,762	31,715	69%	1,213	1,008	83%
South Carolina	148	181,185	110,399	61%	5,018	4,283	85%
South Dakota	27	36,710	12,873	35%	637	527	83%
Tennessee	183	204,324	117,586	58%	5,587	4,656	83%
Texas	566	1,326,417	693,541	52%	26,627	21,278	80%
Utah	72	90,150	56,961	63%	3,839	3,323	87%
Vermont	43	40,700	24,376	60%	1,388	1,115	80%
Virginia	280	328,528	221,196	67%	13,298	10,713	81%
Washington	218	233,543	160,674	69%	17,186	14,041	82%
West Virginia	76	82,235	38,810	47%	1,241	1,010	81%
Wisconsin	165	226,190	103,006	46%	6,474	5,214	81%
Wyoming	23	25,611	9,043	35%	394	304	77%
Totals	9,251	13,561,700	8,039,875	59%	514,943	411,133	80%

*Acura, Alfa Romeo, Aston Martin, Audi, Bentley, BMW, Ferrari, Fiat, Honda, Hyundai, Jaguar, Kia, Lamborghini, Land Rover, Lexus, Lotus, Maserati, Mazda, McLaren, Mercedes-Benz, MINI, Mitsubishi, Nissan, Porsche, Rolls Royce, smart, Subaru, Toyota, Volkswagen, and Volvo.
 **Advanced Technology Vehicles (ATVs) include all hybrid, electric, fuel cell, and natural gas vehicles.
 Source: R.L. Polk Automotive Data and NADA DATA

U.S. EXPORTS

Region	Models
Asia/Oceania	BMW: X3, X5, X4, X6 Honda: Accord, Accord Hybrid, Civic, Civic Hybrid, CR-V, Crosstour, Odyssey, Pilot, Ridgeline, Acura ILX, Acura MDX, Acura RDX, Acura TLX Mercedes-Benz: M-, GL-, R-class Nissan: Altima, LEAF, Pathfinder, Infiniti QX60 Subaru: Legacy, Outback, Tribeca Toyota: Avalon, Avalon Hybrid, Camry, Camry Hybrid, Corolla, Highlander, Sequoia, Sienna, Tundra, Venza Volkswagen: Passat
Europe	BMW: X3, X5, X4, X6 Honda: Accord, Civic, CR-V, Crosstour, Pilot, Acura MDX, Acura RDX, Acura TLX Mercedes-Benz: M-, GL-class Mitsubishi: Outlander Sport Nissan: Altima, Maxima, Murano, Infiniti QX60 Subaru: Legacy, Outback, Tribeca Toyota: Camry, Highlander, Sienna, Tacoma, Venza Volkswagen: Passat
Middle East/Africa	BMW: X3, X5, X4, X6 Honda: Accord, Civic, CR-V, Crosstour, Odyssey, Pilot, Acura MDX Mercedes-Benz: M-, GL-class Mitsubishi: Outlander Sport Nissan: Altima, Armada, Frontier, Maxima, Pathfinder, Xterra, Infiniti QX60 Subaru: Legacy, Outback, Tribeca Toyota: Avalon, Camry, Camry Hybrid, Sequoia Volkswagen: Passat
Latin America/Caribbean	BMW: X3, X5, X4, X6 Honda: Accord, Civic, Crosstour, Odyssey, Pilot, Ridgeline, Acura MDX, Acura RDX, Acura TL, Acura TLX Kia: Sorento Mercedes-Benz: M-, GL-class Mitsubishi: Outlander Sport Nissan: Altima, Pathfinder Subaru: Legacy, Outback, Tribeca Toyota: Camry, Camry Hybrid, Corolla, Highlander, Tacoma, Tundra, Sequoia
North America/U.S. Territories	BMW: X3, X5, X4, X6 Honda: Accord, Civic, Civic Hybrid, CR-V, Odyssey, Pilot, Ridgeline, Acura ILX, Acura MDX, Acura RDX, Acura TLX Hyundai: Sonata, Elantra, Santa Fe Kia: Sorento, Optima Mercedes-Benz: M-, GL-, C-class Mitsubishi: Outlander Sport Nissan: Altima, Armada, Frontier, LEAF, Maxima, Murano, NV, Rogue, Pathfinder, Titan, Xterra, Infiniti QX60 Subaru: Legacy, Outback, Tribeca Toyota: Avalon, Camry, Camry Hybrid, Corolla, Highlander, Sequoia, Sienna, Tacoma, Tundra, Venza Volkswagen: Passat

HERE FOR AMERICA COMPANIES

ASTON MARTIN

U.S. Headquarters: Irvine, California
U.S. Operations Established: 1964

BMW GROUP

U.S. Headquarters: Woodcliff Lake, New Jersey
U.S. Operations Established: 1975
Brands: BMW, MINI and Rolls-Royce

FERRARI

U.S. Headquarters: Englewood Cliffs, New Jersey
U.S. Operations Established: 1990

HONDA

U.S. Headquarters: Torrance, California
U.S. Operations Established: 1959
Brands: Acura and Honda

HYUNDAI

U.S. Headquarters: Fountain Valley, California
U.S. Operations Established: 1986

JAGUAR LAND ROVER

U.S. Headquarters: Mahwah, New Jersey
U.S. Operations Established: 2001

KIA

U.S. Headquarters: Irvine, California
U.S. Operations Established: 1992

MCLAREN

U.S. Headquarters: New York City, New York
U.S. Operations Established: 2010

MASERATI

U.S. Headquarters: Englewood Cliffs, New Jersey
U.S. Operations Established: 2001

MAZDA

U.S. Headquarters: Irvine, California
U.S. Operations Established: 1970

MERCEDES-BENZ

U.S. Headquarters: Montvale, New Jersey
U.S. Operations Established: 1965
Brands: Mercedes-Benz and smart

MITSUBISHI

U.S. Headquarters: Cypress, California
U.S. Operations Established: 1981

NISSAN

U.S. Headquarters: Franklin, Tennessee
U.S. Operations Established: 1958
Brands: Infiniti and Nissan

SUBARU

U.S. Headquarters: Cherry Hill, New Jersey
U.S. Operations Established: 1968

TOYOTA

U.S. Headquarters: Torrance, California
U.S. Operations Established: 1958
Brands: Lexus, Scion and Toyota

VOLKSWAGEN GROUP OF AMERICA

U.S. Headquarters: Herndon, Virginia
U.S. Operations Established: 1955
Brands: Audi, Bentley, Bugatti, Lamborghini, Porsche and Volkswagen

VOLVO

U.S. Headquarters: Rockleigh, New Jersey
U.S. Operations Established: 1956

ASSOCIATION OF GLOBAL AUTOMAKERS

The Association of Global Automakers represents international motor vehicle manufacturers, original equipment suppliers, and other automotive-related trade associations. Our global perspective has led us to approach every issue collaboratively by working with industry leaders, legislators, regulators, and other stakeholders to create the kind of public policy that improves vehicle safety, encourages technological innovation, and protects our planet.

Our goal is to foster an open and competitive automotive marketplace that encourages investment, job growth, and development of more vehicles that enhance Americans' quality of life. The Association has served as the voice of automobile manufacturers from around the world since 1961 under various names.

GLOBAL AUTOMAKERS

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GlobalAutomakers 

AMERICAN INTERNATIONAL AUTOMOBILE DEALERS ASSOCIATION

Established in 1970, the American International Automobile Dealers Association (AIADA) is the only national trade association whose sole purpose is to represent America's nearly 10,000 international nameplate new automobile dealership franchises. The Association serves as an advocate for the industry before Congress, the White House, and federal agencies. AIADA is the international nameplate dealers' first line of defense in Washington, D.C., and its members are part of an active dealer community with a powerful voice. We focus our lobbying efforts on issues impacting America's international nameplate automobile dealers, including: trade and anti-competitive restrictions; regulatory overreach; tax measures; energy and fuel economy policies; and other industry-related issues.

AMERICAN INTERNATIONAL AUTOMOBILE DEALERS ASSOCIATION

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AmericanInternational
AutomobileDealers®

Sources used to compile the data used in this report: AIADA's membership roster, the 2014 Global Automakers and AIADA Economic Impact Survey, NADA DATA, WardsAuto InfoBank, and R.L. Polk Automotive Data. Automobile manufacturers participating in the 2014 Global Automakers and AIADA Economic Impact Survey: BMW Group, Honda, Hyundai, Kia, Mazda, Mercedes-Benz, Mitsubishi, Nissan, Subaru, Toyota, Volkswagen Group, and Volvo.



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