



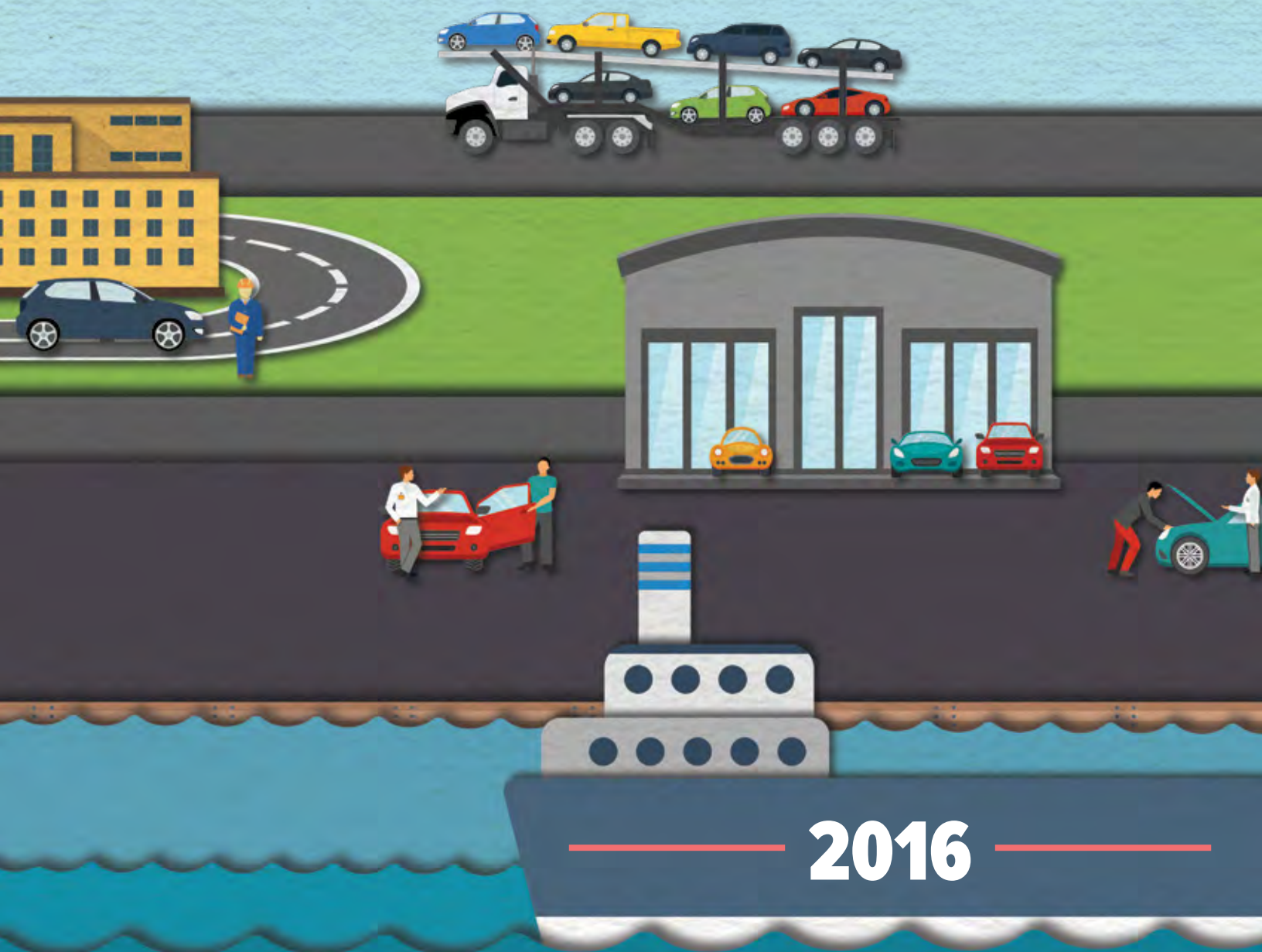
HERE *for* AMERICA

INTERNATIONAL AUTOMAKERS IN AMERICA

BUILDING MORE THAN CARS

Invested in the U.S.

\$73 billion
and counting...





HERE *for* AMERICA



TABLE OF CONTENTS

Executive Summary 2

Our Impact in 2016

Manufacturing 3

Employment 4

Exports 5

Dealership Franchises 6

Sales 7

Research & Development 8

Green Vehicles 9

International Automakers Across America

U.S. Map 10

By the Numbers

U.S. Manufacturing 12

U.S. Production Growth 13

U.S. Sales 14

U.S. Exports 15

About Us

Here For America Companies 16



EXECUTIVE SUMMARY

The growth of international automakers in the United States is an American success story.

It's a story about American jobs and the profound impact of a **\$73 billion investment in the U.S. economy**. It's also about providing American consumers with an abundance of vehicle choices through innovative designs, advanced manufacturing processes, and transformative technologies.

International automakers experienced a record year in both production and sales in the U.S. In 2015, they **manufactured nearly half of all U.S. automobiles**.

International nameplate **dealerships sold 8.3 million vehicles**, accounting for 59% of all U.S. retail vehicle sales. This robust dealership network **employs a half million Americans**.

13.9 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 (DBA SCOUT Economics) using IMPLAN U.S. input-output model for 2014.

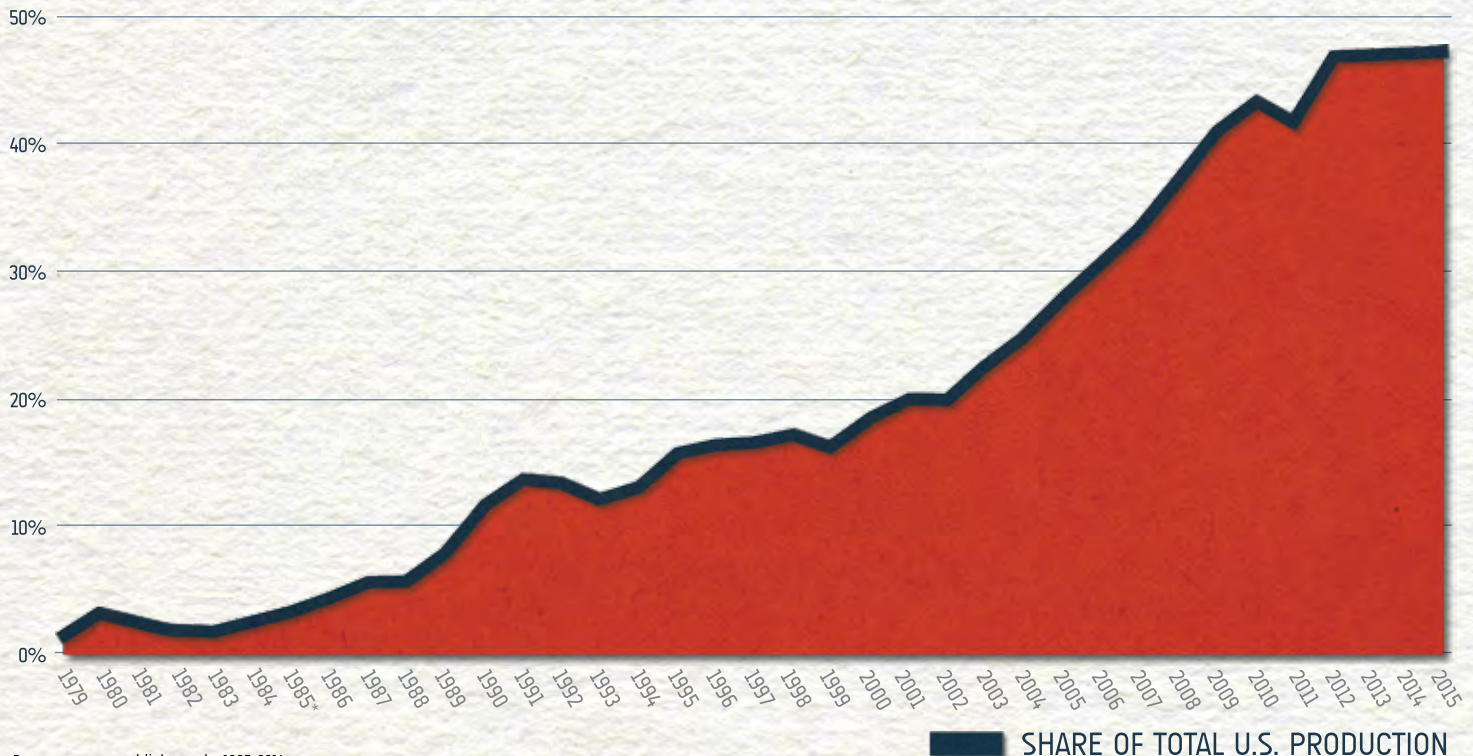
With intensive research and development efforts, international automakers are continually creating cleaner vehicle technologies. Their cars made up **4 of every 5 green vehicles sold** in the U.S. in 2015.

International automakers are also exporters—**shipping 750,000 American-made cars and trucks** to 140 different countries in 2015.

International automakers are here for America, and they're building more than cars.

This report is a joint effort of the Association of Global Automakers and the American International Automobile Dealers Association.

INTERNATIONAL AUTOMAKERS' SHARE OF U.S. AUTO PRODUCTION HAS GROWN FROM **1%** IN 1979 TO **46%** IN 2015.



Passenger cars and light trucks 1985-2014.

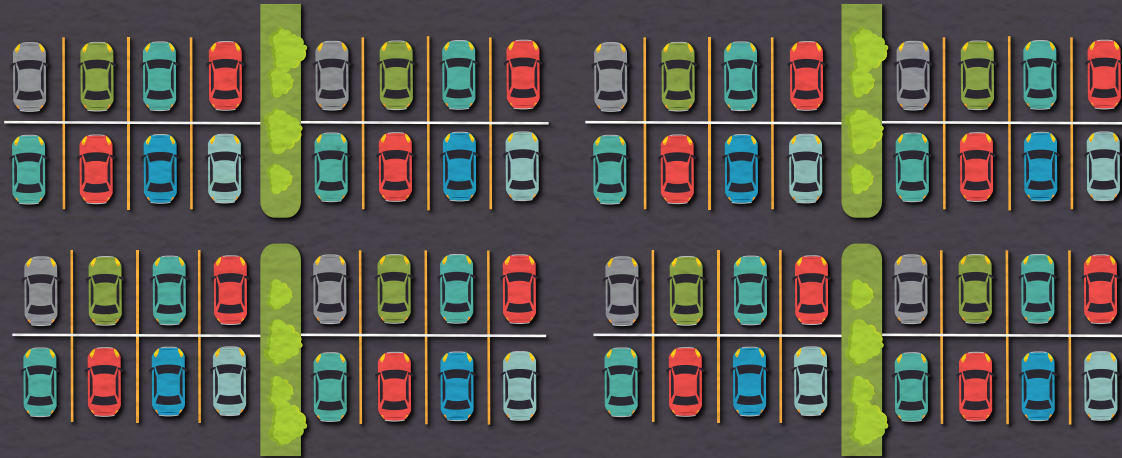
Source: Production data from WardsAuto InfoBank for BMW Group, Honda, Hyundai, Kia, Mazda, Mercedes-Benz, Mitsubishi, Nissan, Subaru, Toyota, Volkswagen Group, and Volvo.

Data based on 2015 calendar year. Capital investment total is cumulative through December 31, 2015.

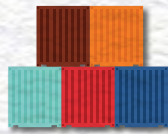


MANUFACTURING

International automakers produced **5.4 million** vehicles in the U.S. in 2015. That's enough cars to fill every parking spot at the Mall of America ... 265 times!



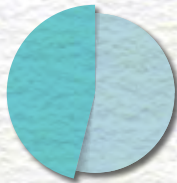
36 manufacturing facilities



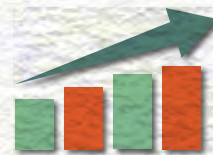
\$127 billion purchased from U.S. suppliers



5,397,176 vehicles produced in 2015

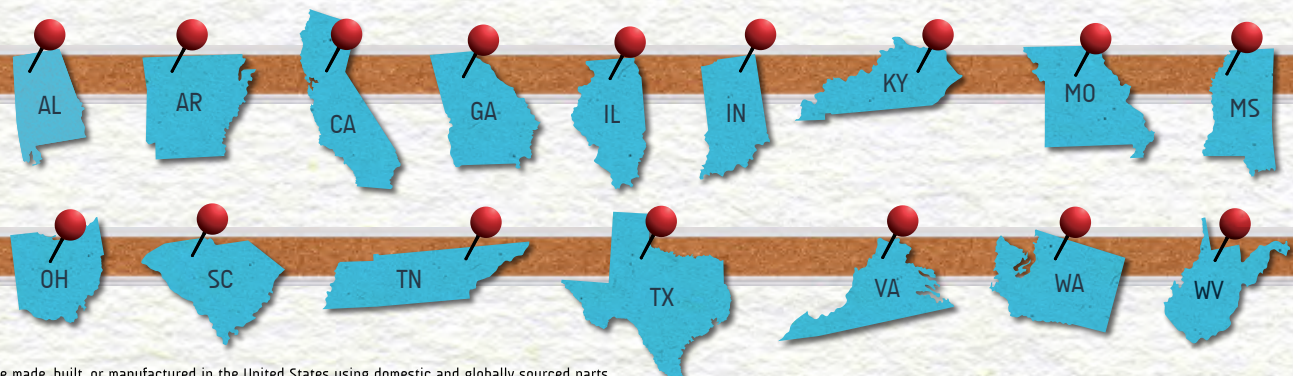


46% of all U.S. vehicle production

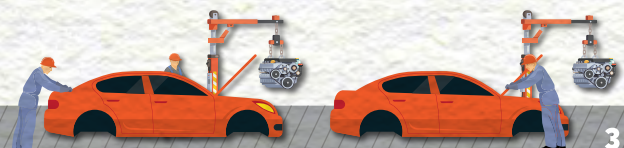


Production increase of **47%** from 2005 to 2015

16 states with international automaker manufacturing facilities:

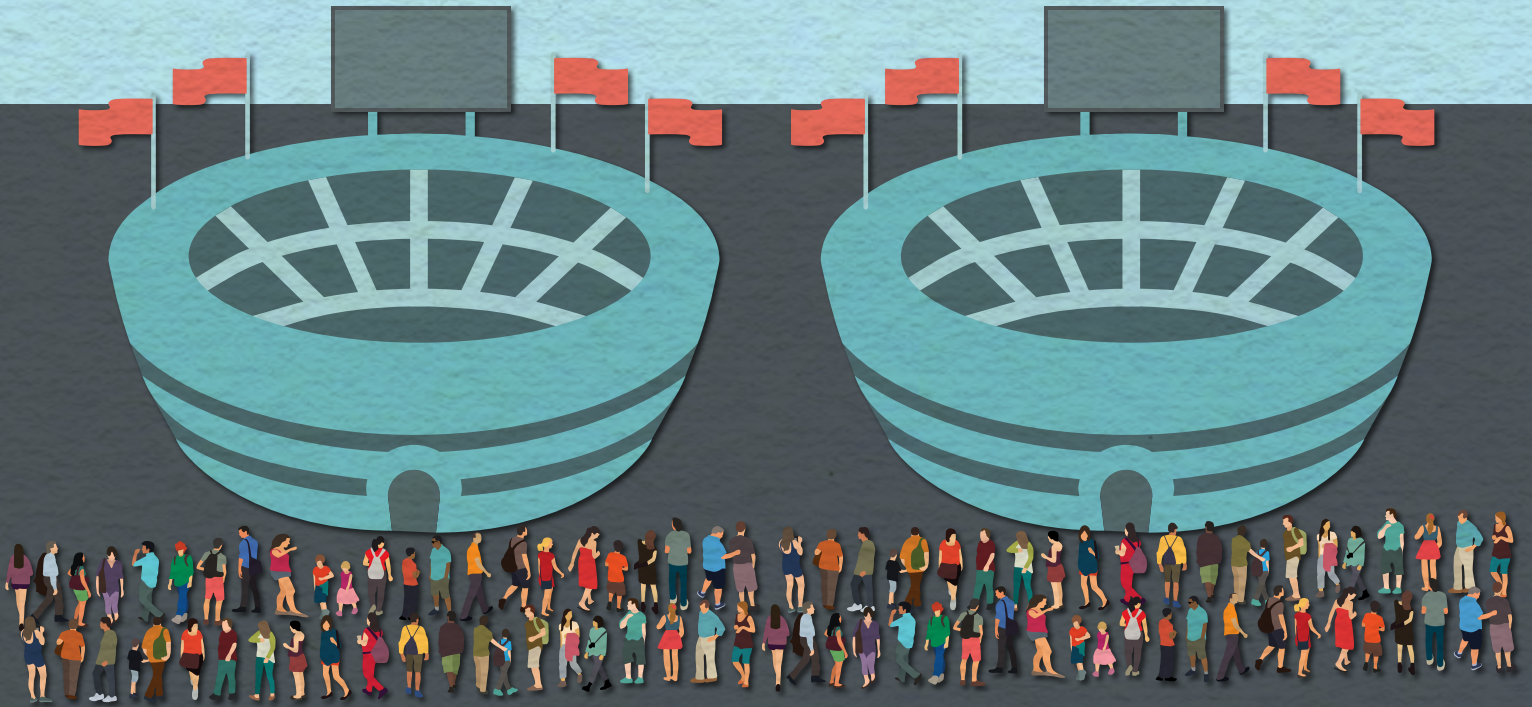


Vehicles are made, built, or manufactured in the United States using domestic and globally sourced parts. U.S. supplier purchases include parts and materials as well as goods and services.

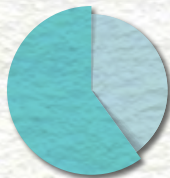


EMPLOYMENT

International automakers directly employ **126,500** Americans. That's enough to fill a Super Bowl stadium twice!



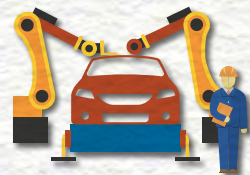
126,500 direct
U.S. employees



61% of jobs are in
manufacturing

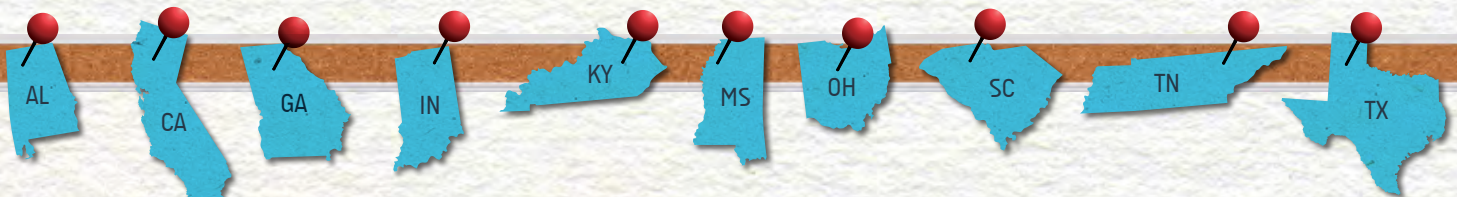


Payroll of
\$9.9 billion



1.25 million indirect
U.S. jobs created

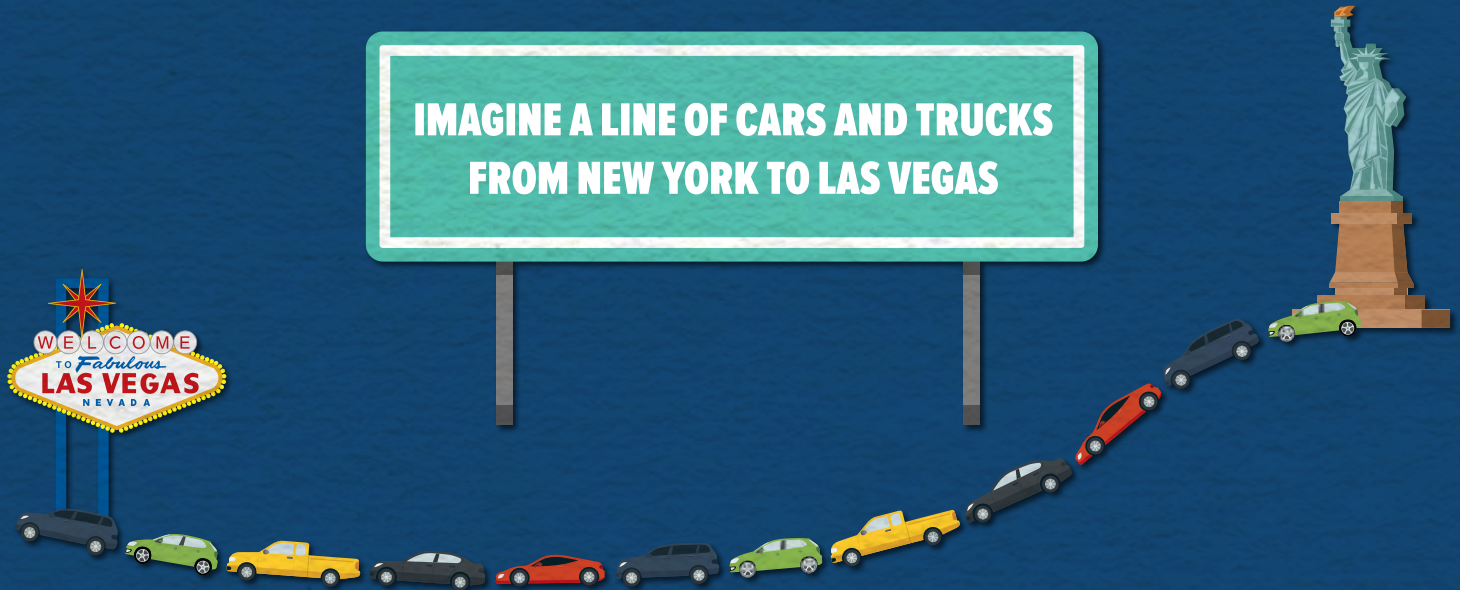
Top 10 states for international automakers' direct employment:



13.9 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 (DBA SCOUT Economics) using IMPLAN U.S. input-output model for 2014.



EXPORTS



That's **750,000** vehicles—the number of American-made cars and trucks international automakers exported last year to countries around the globe.
















750,000 vehicles
exported in 2015



140 countries

17 ports of export:

Benicia, CA  Long Beach, CA  Los Angeles, CA  Mira Loma, CA  Oakland, CA
Port Hueneme, CA  Richmond, CA  Jacksonville, FL  Miami, FL  Port Everglades, FL
Brunswick, GA  Savannah, GA  Baltimore, MD  Charleston, SC  Houston, TX
Aberdeen, Hoquiam, WA  Vancouver, WA



DEALERSHIP FRANCHISES

More than half of all U.S. car dealership jobs are created by international nameplate automobile dealers.



9,500 international nameplate automobile dealer franchises across the country

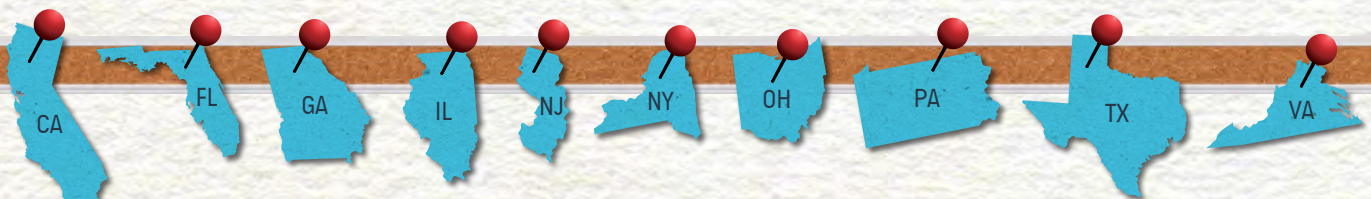


570,000 direct U.S. dealership employees



Payroll of **\$32 billion**

Top 10 states for international dealership franchise employment:



SALES

8.3 million vehicles made by international automakers were sold in the U.S. last year—enough to wrap around the globe!



Record-breaking sales of
8,336,500 vehicles

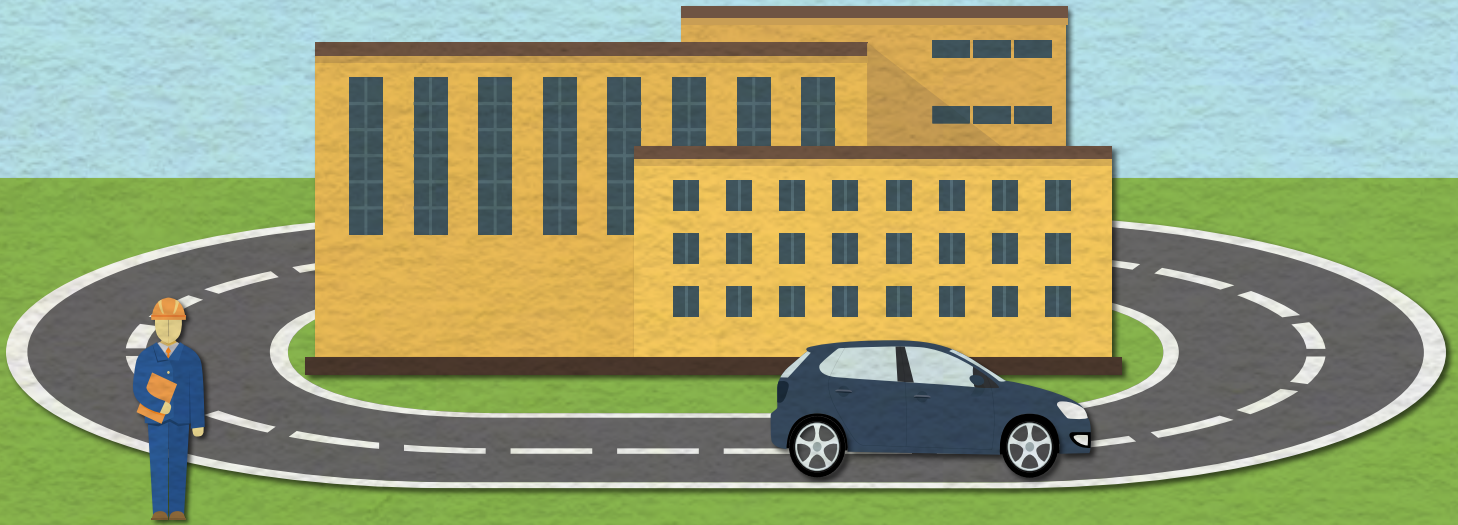


59% market share of 2015
U.S. retail vehicle sales

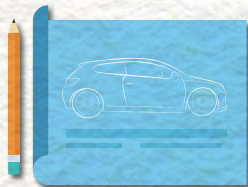


RESEARCH & DEVELOPMENT

International automakers operate **63 R&D facilities** in the U.S. that perform all aspects of vehicle design including market research, infotainment system development, crash safety testing, and advanced research of connected and automated vehicle systems.



R&D activities include:



design

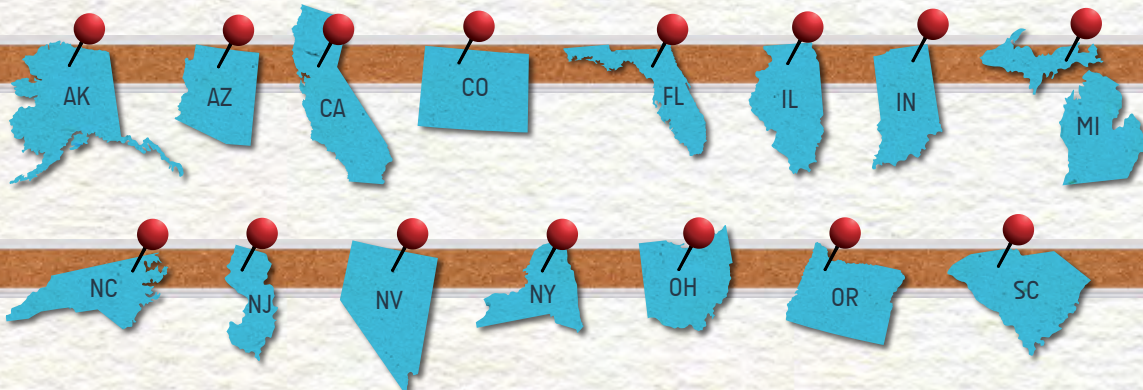


crash test safety



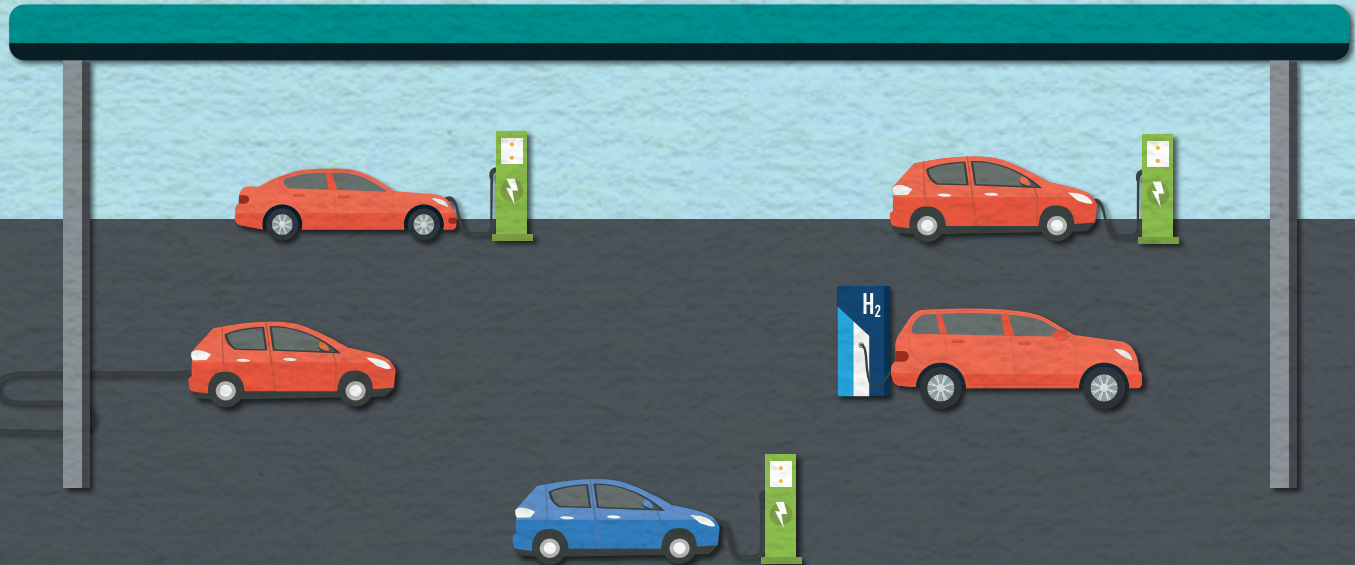
connected car research

63 R&D facilities located in 15 states:

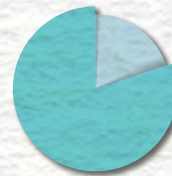


GREEN VEHICLES

4 of every 5 green vehicles sold in the U.S. are made by international automakers.



345,585 green vehicles
sold in 2015



79% market share of 2015
green vehicle retail sales

Green vehicles include:



hybrids



battery electric
vehicles (BEVs)



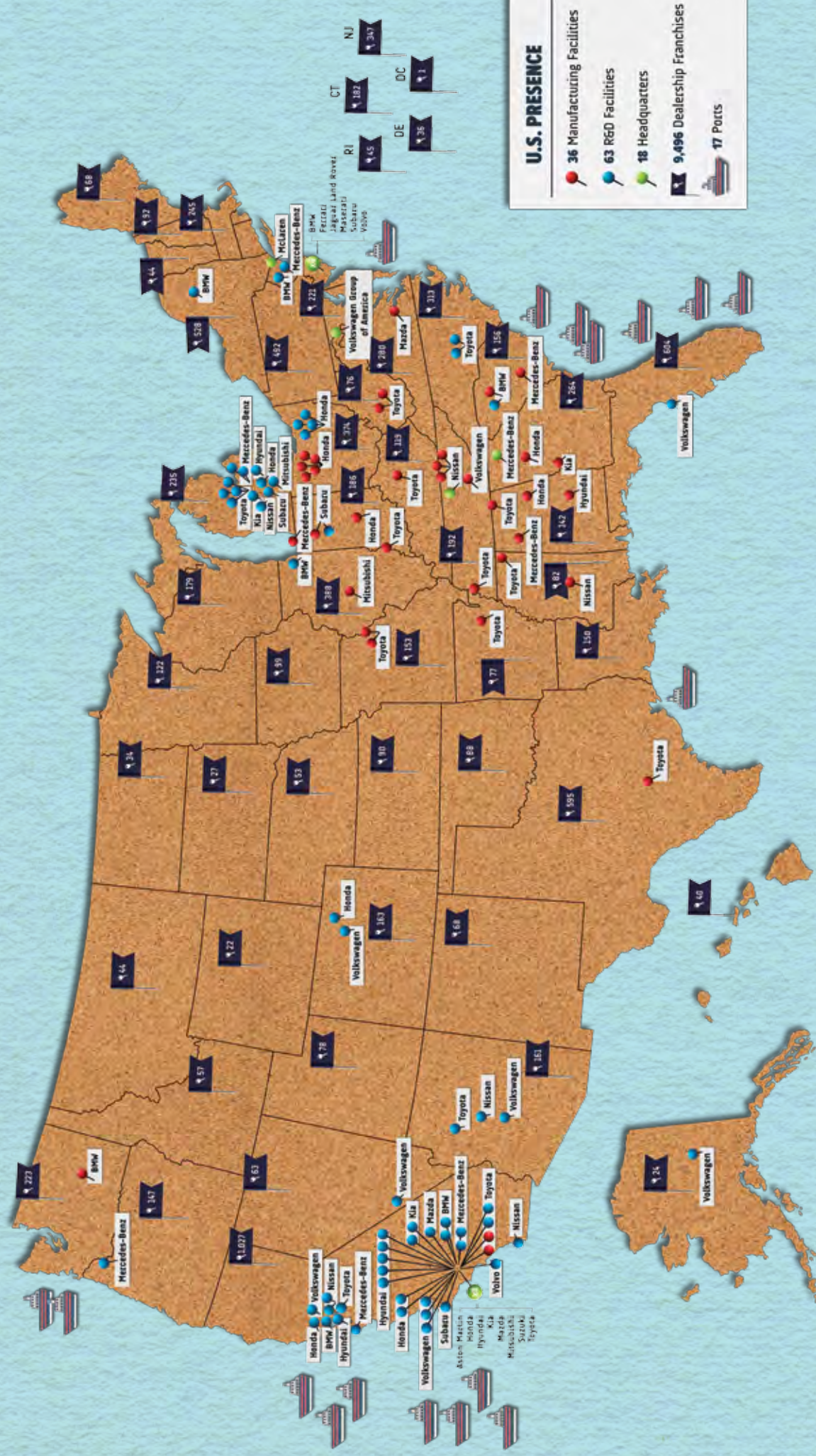
hydrogen fuel cell
electric vehicles (FCEVs)



plug-in hybrid
electric vehicles (PHEVs)



INTERNATIONAL AUTOMAKERS ACROSS AMERICA



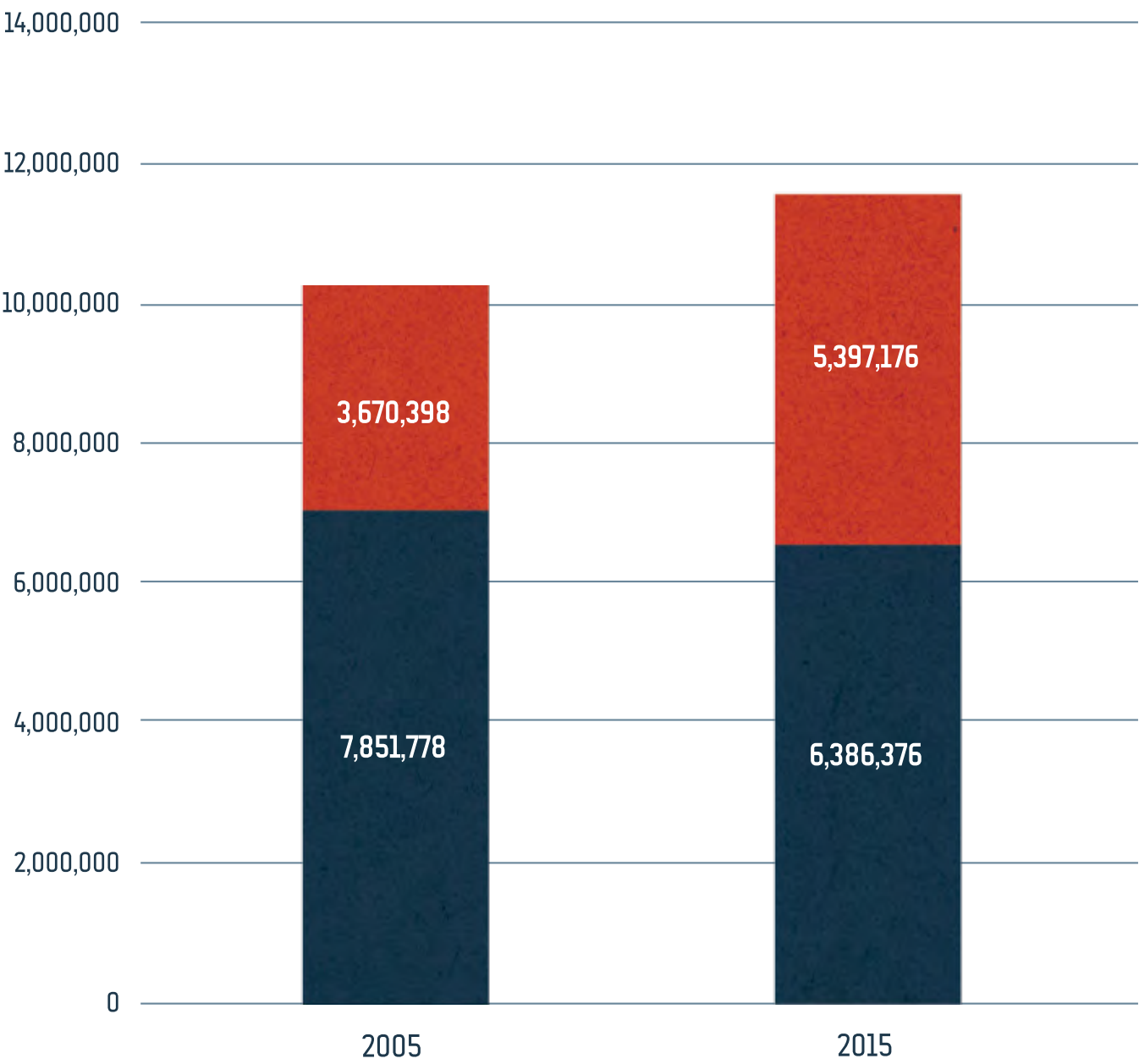
U.S. MANUFACTURING

State	Automaker	Facility Name	City	Production Start	Vehicles/Components Produced
Alabama	Honda	Honda Manufacturing of Alabama, LLC	Lincoln	2001	Odyssey, Pilot, Ridgeline, Acura MDX, V-6 engines
	Hyundai	Hyundai Motor Manufacturing Alabama	Montgomery	2005	Elantra, Santa Fe*, Sonata
	Mercedes-Benz	Mercedes-Benz U.S. International, Inc.	Vance	1995	GLA-, GLE-, GLS- and 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, Tesla
	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 Motors North America, Inc. Manufacturing Division	Normal	1998	Outlander Sport
Indiana	Honda	Honda Manufacturing of Indiana, LLC	Greensburg	2008	Civic
	Mercedes-Benz	AM General, LLC	Mishawaka	2015	R-class
	Subaru	Subaru of Indiana Automotive, Inc.	Lafayette	1989	Impreza*, Legacy, Outback, Toyota Camry
	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, Lexus ES, 4-cylinder and V-6 engines, powertrain parts
Mississippi	Nissan	Nissan Canton Vehicle Assembly Plant	Canton	2003	Altima, Armada, Frontier, Murano, Titan, NV Passenger, NV Cargo
	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. 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 of America Manufacturing, Inc. Marysville Auto Plant	Marysville	1982	Accord Coupe, Accord Sedan, Acura ILX, Acura TLX
	Honda	Honda of America Manufacturing, Inc. Performance Manufacturing Center	Marysville	2016	Acura NSX*
	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, X4, X5, X6
	Mercedes-Benz	Mercedes-Benz Vans, LLC	Ladson	2001	Sprinter
Tennessee	Nissan	Nissan Decherd Powertrain Plant	Decherd	1997	Engines
	Nissan	Infiniti Decherd Powertrain Plant	Decherd	2014	Engines
	Nissan	Nissan Smyrna Vehicle Assembly Plant and Battery Plant	Smyrna	1983	Altima, LEAF, Maxima, Pathfinder, Rouge, Xterra, Infiniti QX60, lithium-ion batteries
	Toyota	Bodine Aluminum, Inc.	Jackson	2003	Cylinder blocks, automatic transmission parts
	Volkswagen	Volkswagen Chattanooga	Chattanooga	2010	Passat
Texas	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	SGL Automotive Carbon Fibers	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



*Production began in 2016.

U.S. PRODUCTION GROWTH

INTERNATIONAL AUTOMAKERS HAVE INCREASED PRODUCTION BY **47%** FROM 2005 TO 2015



Source: Production data from WardsAuto InfoBank for BMW Group, Honda, Hyundai, Kia, Mazda, Mercedes-Benz, Mitsubishi, Nissan, Subaru, Toyota, Volkswagen Group, and Volvo.

 INTERNATIONAL AUTOMAKERS
 FCA, FORD, GM



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	179,215	101,439	57%	2,559	2,205	86%
Alaska	24	22,960	10,081	44%	332	263	79%
Arizona	161	282,646	168,146	59%	8,425	6,516	77%
Arkansas	77	119,320	51,555	43%	1,395	1,225	88%
California	1,027	1,805,288	1,361,112	75%	170,448	131,175	77%
Colorado	163	212,027	132,085	62%	6,064	4,650	77%
Connecticut	182	169,586	121,627	72%	3,664	2,752	75%
Delaware	36	46,850	27,394	58%	1,095	817	75%
District of Columbia	1	17,843	13,487	76%	1,105	893	81%
Florida	604	1,108,890	770,025	69%	26,235	21,097	80%
Georgia	264	388,783	233,441	60%	13,595	11,942	88%
Hawaii	40	52,009	40,942	79%	2,519	2,119	84%
Idaho	57	51,204	26,535	52%	1,353	1,150	85%
Illinois	388	537,144	298,706	56%	13,059	10,092	77%
Indiana	186	223,525	96,093	43%	4,473	3,490	78%
Iowa	99	121,595	45,685	38%	2,249	1,779	79%
Kansas	90	96,464	46,518	48%	2,024	1,614	80%
Kentucky	119	132,618	67,499	51%	2,447	2,051	84%
Louisiana	150	201,493	101,867	51%	1,661	1,435	86%
Maine	68	59,423	32,848	55%	1,449	1,180	81%
Maryland	221	274,117	185,288	68%	7,799	6,089	78%
Massachusetts	245	335,081	237,021	71%	8,456	6,991	83%
Michigan	235	528,254	95,806	18%	6,734	3,242	48%
Minnesota	122	207,009	97,468	47%	4,038	3,244	80%
Mississippi	82	96,726	51,389	53%	971	834	86%
Missouri	153	210,532	93,634	44%	4,136	3,073	74%
Montana	44	41,137	15,942	39%	767	650	85%
Nebraska	53	77,066	30,878	40%	1,273	998	78%
Nevada	63	124,601	81,449	65%	3,489	2,754	79%
New Hampshire	92	85,535	53,227	62%	1,607	1,315	82%
New Jersey	347	518,970	361,892	70%	8,834	6,705	76%
New Mexico	68	81,567	40,328	49%	1,856	1,603	86%
New York	528	941,475	609,219	65%	18,845	15,406	82%
North Carolina	313	389,011	240,730	62%	9,694	8,264	85%
North Dakota	34	36,637	12,136	33%	303	250	83%
Ohio	374	532,368	267,546	50%	8,576	6,594	77%
Oklahoma	88	142,723	61,658	43%	2,024	1,712	85%
Oregon	147	135,392	92,213	68%	8,640	6,924	80%
Pennsylvania	492	600,281	351,535	59%	7,908	10,850	77%
Rhode Island	45	46,801	31,920	68%	972	824	85%
South Carolina	156	184,368	112,102	61%	3,575	3,067	86%
South Dakota	27	35,381	12,072	34%	440	339	77%
Tennessee	192	218,056	125,049	57%	4,245	3,534	83%
Texas	595	1,324,683	702,284	53%	20,330	16,249	80%
Utah	78	90,187	57,991	64%	3,130	2,639	84%
Vermont	44	40,348	23,566	58%	1,187	886	75%
Virginia	280	337,570	227,039	67%	9,814	7,886	80%
Washington	223	245,414	169,767	69%	15,417	12,566	82%
West Virginia	76	78,652	36,922	47%	888	759	85%
Wisconsin	179	229,385	102,789	45%	5,040	3,639	72%
Wyoming	22	22,546	8,565	38%	236	196	83%
Totals	9,496	14,040,756	8,336,510	59%	439,675	345,585	79%

*Acura, Alfa Romeo, Aston Martin, Audi, Bentley, BMW, Ferrari, Fiat, Honda, Hyundai, Infiniti, 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 (Green) include all hybrid, electric, and fuel cell vehicles.

Source: IHS Automotive Vehicle Registration Data and NADA DATA



U.S. EXPORTS

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

HYUNDAI

U.S. Headquarters: Fountain Valley, California

U.S. Operations Established: 1985

Brands: Hyundai and Genesis

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

MASERATI

U.S. Headquarters: Englewood Cliffs, New Jersey

U.S. Operations Established: 2001

MAZDA

U.S. Headquarters: Irvine, California

U.S. Operations Established: 1970

MCLAREN

U.S. Headquarters: New York City, New York

U.S. Operations Established: 2010

MERCEDES-BENZ

U.S. Headquarters: Atlanta, Georgia

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: Nissan and Infiniti

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: Volkswagen, Audi, Bentley, Bugatti, Lamborghini, and Porsche

VOLVO

U.S. Headquarters: Rockleigh, New Jersey

U.S. Operations Established: 1956





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.

AmericanInternational AutomobileDealers®

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.

GLOBAL AUTOMAKERS

1050 K Street, NW, Suite 650
Washington, D.C. 20001

☎ 202-650-5555

🌐 www.globalautomakers.org

AMERICAN INTERNATIONAL AUTOMOBILE DEALERS ASSOCIATION

500 Montgomery Street, Suite 800
Alexandria, VA 22314

☎ 1-800-GO-AIADA

🌐 www.AIADA.org

Sources used to compile the data used in this report: AIADA's membership roster, the 2015 Global Automakers and AIADA Economic Impact Survey, NADA DATA, IHS Automotive Vehicle Registration Data, and WardsAuto InfoBank.

Automobile manufacturers participating in the 2015 Global Automakers and AIADA Economic Impact Survey: BMW Group, Honda, Hyundai, Kia, Mazda, Mercedes-Benz, Mitsubishi, Nissan, Subaru, Toyota, Volkswagen Group, and Volvo.





HERE *for* AMERICA



HereForAmerica.com