Detroit – Washington D. C.

OESA
Automotive Supplier Barometer
Focus on Globalization

The OESA Automotive Supplier Barometer is published with the support of Deloitte LLP.

Deloitte.

May 4-6, 2015
88 Survey Responses

OESA Automotive Supplier Barometer Executive Summary

- The May OESA Automotive Supplier Barometer focused on industry globalization. OESA received 88 responses to this Barometer survey.
- The Supplier Sentiment Index (SSI) continues to remain positive, though down slightly to 53 from the March index of 55. This decline was not necessarily due to an increase in pessimism, but more an increase in the 'unchanged' outlook, from optimistic.
- Absolute growth continues in all global regions with the exception of South America. Mexico continues to remain strong, followed closely by the U.S. and China. Overall, economics, labor costs and transportation are the most significant hurdles in achieving growth. In the U.S. hurdles are more related to talent availability, government regulations and customer cost pressures.
- For products produced in North America, the United States is the major hub of operations with 70 percent of manufacturing occurring here.
- Seventy-one respondent companies export N.A. production outside of the U.S. The median exported is 15 percent, based on dollar value. Seventy-three respondent companies purchase material for N.A. production outside of the U.S. with the median purchased value of 20 percent based on dollar value.
- Where companies need production capacity to increase, the key strategies being implemented continue to be adding new facilities and using existing facilities with additional floor space or additional shifts. Where additional engineering capabilities are needed, hiring permanent staff is the most likely choices to support growth strategies in all regions. Overall, where production component/systems sourcing capacity needs to increase, companies are expanding business with existing suppliers.

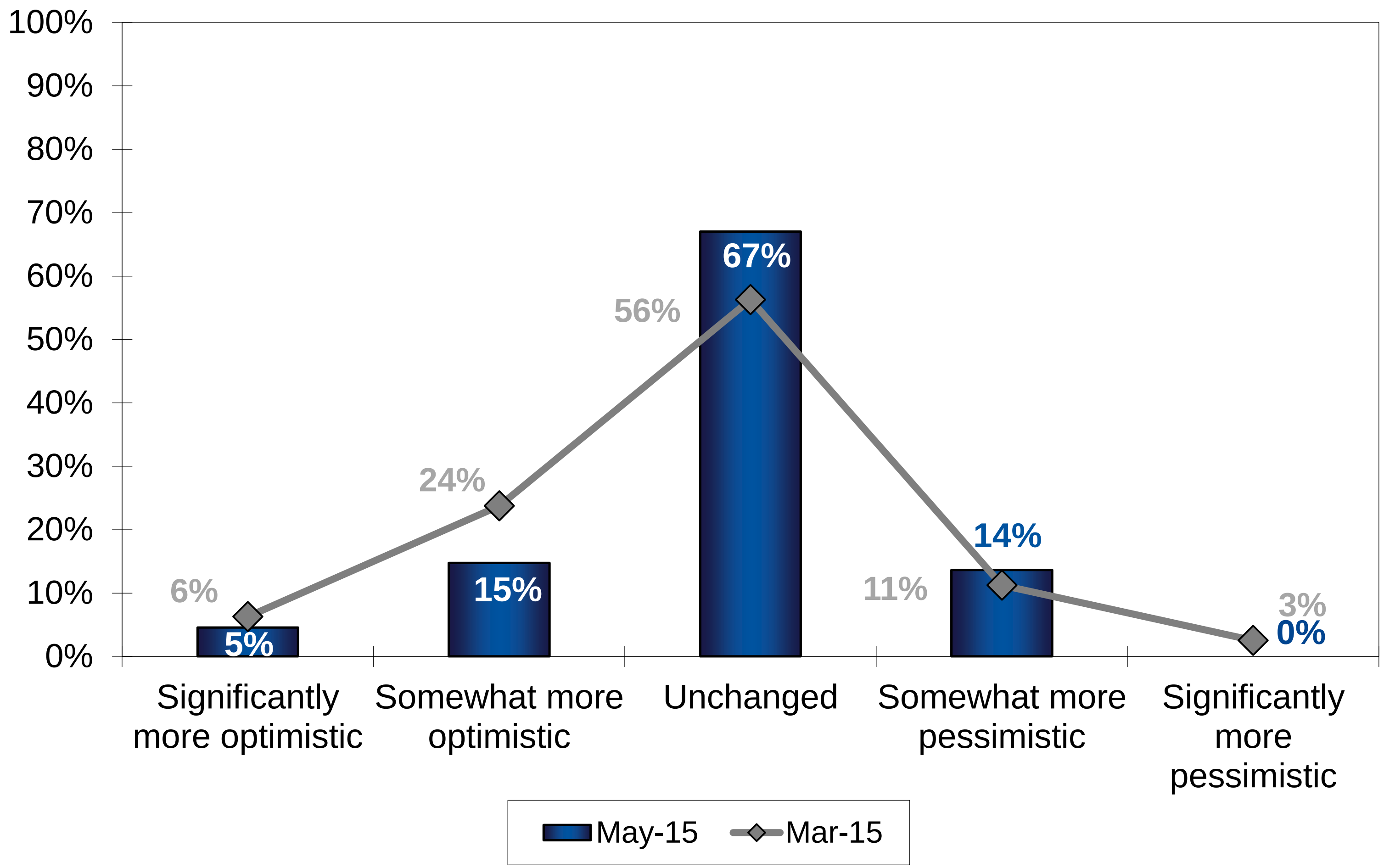
OESA Automotive Supplier Barometer Summary Details

- **The May OESA Automotive Supplier Barometer focused on industry globalization. OESA received 88 responses to this Barometer survey.**
- **The Supplier Sentiment Index (SSI) continues to remain positive, though down slightly to 53 from the March index of 55. This decline was not necessarily due to an increase in pessimism, but more an increase in the 'unchanged' outlook, from optimistic;** with the notable exception of companies with annual revenue less than $50 million trending to a more positive sentiment. New business opportunities and strong sales/production volumes are the drivers of supplier optimism but indications are that companies are seeing the market begin to level off. Competition plays a role in an unsure outlook. Suppliers are concerned about the regions of South America and Europe, particularly Russia and Greece. (See pages 5-9)
- **Absolute growth continues in all global regions with the exception of South America.** However, when considering rate of growth, all regions are slowing with the exception of Japan/Korea, where a slight increase in the growth rate is shown. **Mexico continues to remain strong, followed closely by the U.S. and China. Overall, economics, labor costs and transportation are the most significant hurdles in achieving growth.** Though in China, labor costs seem to be improving. Managerial direction and oversight are improving factors in regional growth. **In the U.S. hurdles are more related to talent availability, government regulations and customer cost pressures.** (See pages 10-14)
- **For products produced in North America, the United States is the major hub of operations with 70 percent of manufacturing occurring here.** Mexico and Canada average 24 percent and 6 percent of manufacturing respectively. Based on the comments received from respondents, there are differing strategies related to Mexican operations; some are clearly focused on growth in that region, while others are continuing to focus on existing operations in the United States. (See pages 15-17)

OESA Automotive Supplier Barometer Summary Details (continued)

- **Seventy-one respondent companies <u>export</u> N.A. production outside of the U.S. The median exported is 15 percent, based on dollar value** (lower quartile of 9 percent and upper quartile of 26 percent). The destination regions with the highest concentration of export value are Mexico, Canada and Europe with 40 percent, 25 percent and 20 percent respectively. **Seventy-three respondent companies <u>purchase</u> material for N.A. production outside of the U.S. with the median purchased value of 20 percent based on dollar value** (lower quartile of 7 percent and upper quartile of 40 percent). The purchase regions with the highest concentration of dollar value are China, Japan/Korea, and Mexico with 30 percent, 29 percent and 27 percent respectively. (See pages 18-24)
- **Where companies need production capacity to increase, the key strategies being implemented continue to be adding new facilities and using existing facilities with additional floor space or additional shifts.** In Mexico, new facilities are the predominant chosen strategy. In Europe, adding new facilities along with additional shifts in existing facilities is most common. In Japan/Korea, adding shifts and developing partnerships and JVs is a growing trend. In China, suppliers are moving more toward adding facilities while moving away from adding floor space to existing facilities. (See pages 25-27)
- **Where additional engineering capabilities are needed, hiring permanent staff is the most likely choices to support growth strategies in all regions.** In Japan/Korea and China, development of partnerships and JVs is growing. New to the Barometer this year, is the use of temporary/contract staffing. This strategy is played out most often in Europe. (See pages 28-29)
- **Overall, where production component/systems sourcing capacity needs to increase, companies are expanding business with existing suppliers.** However, in Mexico, companies are adding to their supply base. Companies expanding in China are moving away from adding to their supplier deck in favor of expanding business with current suppliers. In South Asia, companies are implementing expanding current supplier business and adding suppliers. (See pages 30-31)

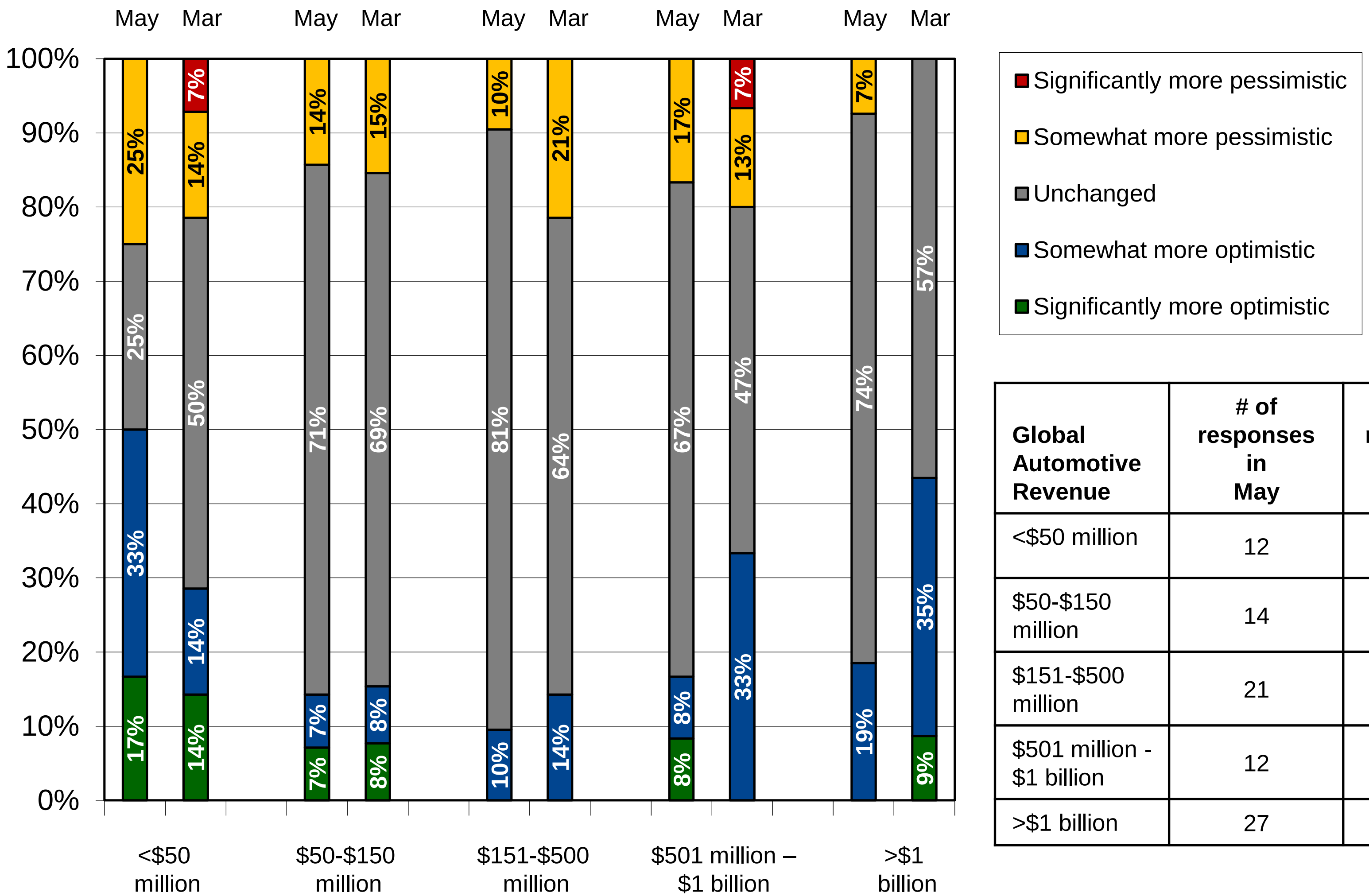
Describe the general twelve month outlook for your business. Over the past two months, has your opinion become:



No. of Responses = 88

Barometer Results

By Company Revenue



Global Automotive Revenue	# of responses in May	# of responses in March
<$50 million	12	14
$50-$150 million	14	13
$151-$500 million	21	14
$501 million - $1 billion	12	15
>$1 billion	27	23

No. of Responses = 86

Describe the general twelve month outlook for your business. Over the past two months, has your opinion become…comments:

Significantly More Optimistic

- New program launches in North America and Asia-Pacific.
- Multiple new programs starting.
- My position is more about our unique business and would be slightly less optimistic in regard to the overall market.

Somewhat More Optimistic

- 2014 was a strong year and we expect similar vehicle production in 2015.
- New launches occurring on-time and with no issues.
- Year-end sales are further above original forecast; strong sales in all major regions with all customers.
- Up-tick in auto industry, specifically lower volume niche vehicles and rapid model changes.
- We are seeing volumes increase over 2014, but at a slower pace. Margins have been flat.
- New business opportunities trending upward.

Unchanged

- I still think 2015 will be a solid year.
- Remain optimistic on the outlook based on what we have in the pipeline over the next seven years.
- Stable strong customer demand.
- We have been an international company for many years. The current conditions have not affected our 5 year plan in any real measurable way.
- We continue to see strong opportunities in the automotive sector, in particular focusing on new product development and innovation.
- Actuals are in line with forecast.
- Various market factors have not changed significantly over the past 2 months to change my opinion.
- South America and Russia remain significant concerns. Europe to a lessor degree, depends upon what happens in Greece. This could have a significant impact.

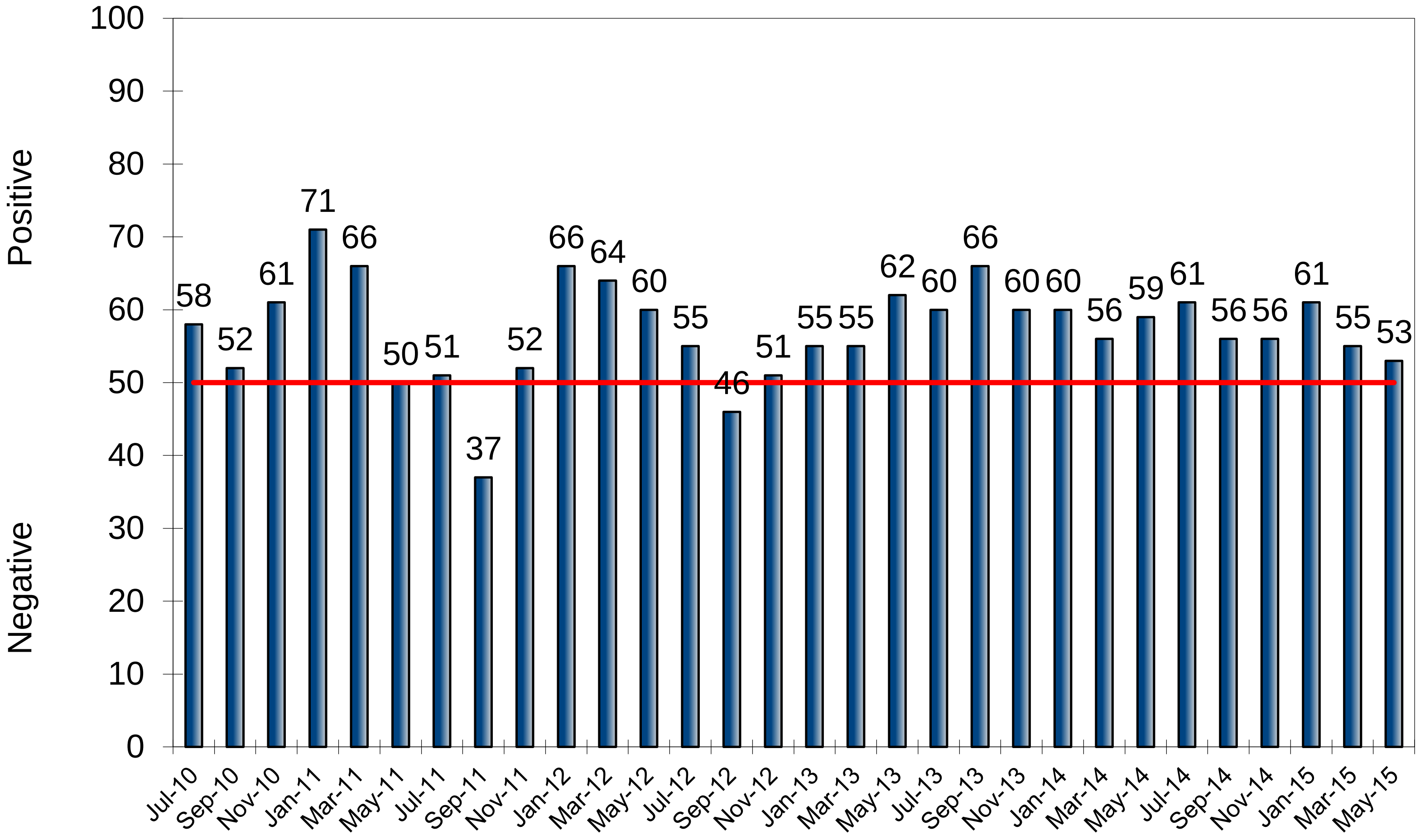
Describe the general twelve month outlook for your business. Over the past two months, has your opinion become…comments: (continued)

Somewhat More Pessimistic

- Incremental shutdown periods added by OEMs later in the year.
- Appears economy may be slowing, so we expect flat growth.
- Seeing some softness in orders compared to budgeted levels. Could be budget miss or could be some slowing of actual sales.
- Short-term orders have fallen off.
- Changes to GM Oshawa's production.
- Fierce competitive pressures are becoming more evident.
- Demand appears to be softening. Customer purchasing practices are becoming increasingly predatory.
- Every day forward is one step closer to the next cycle.
- The volume of mold business being sourced to LCC is increasing.

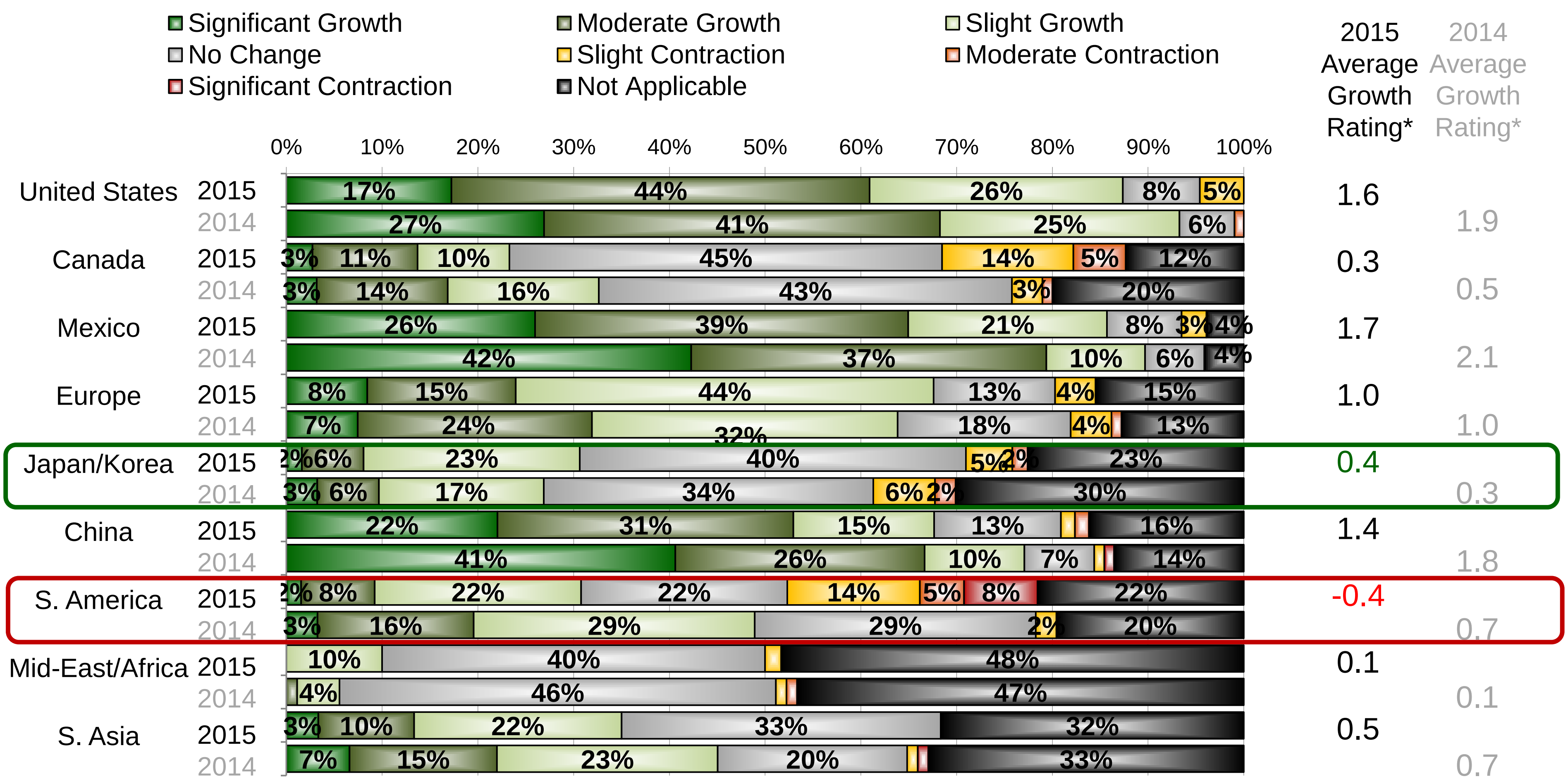
OESA Automotive Supplier Sentiment Index

Compared to two months ago, how has your 12 month outlook changed?



No. of Responses = 88

Related to your regional revenue, identify your incremental growth/contraction in each of the following locations through 2020.



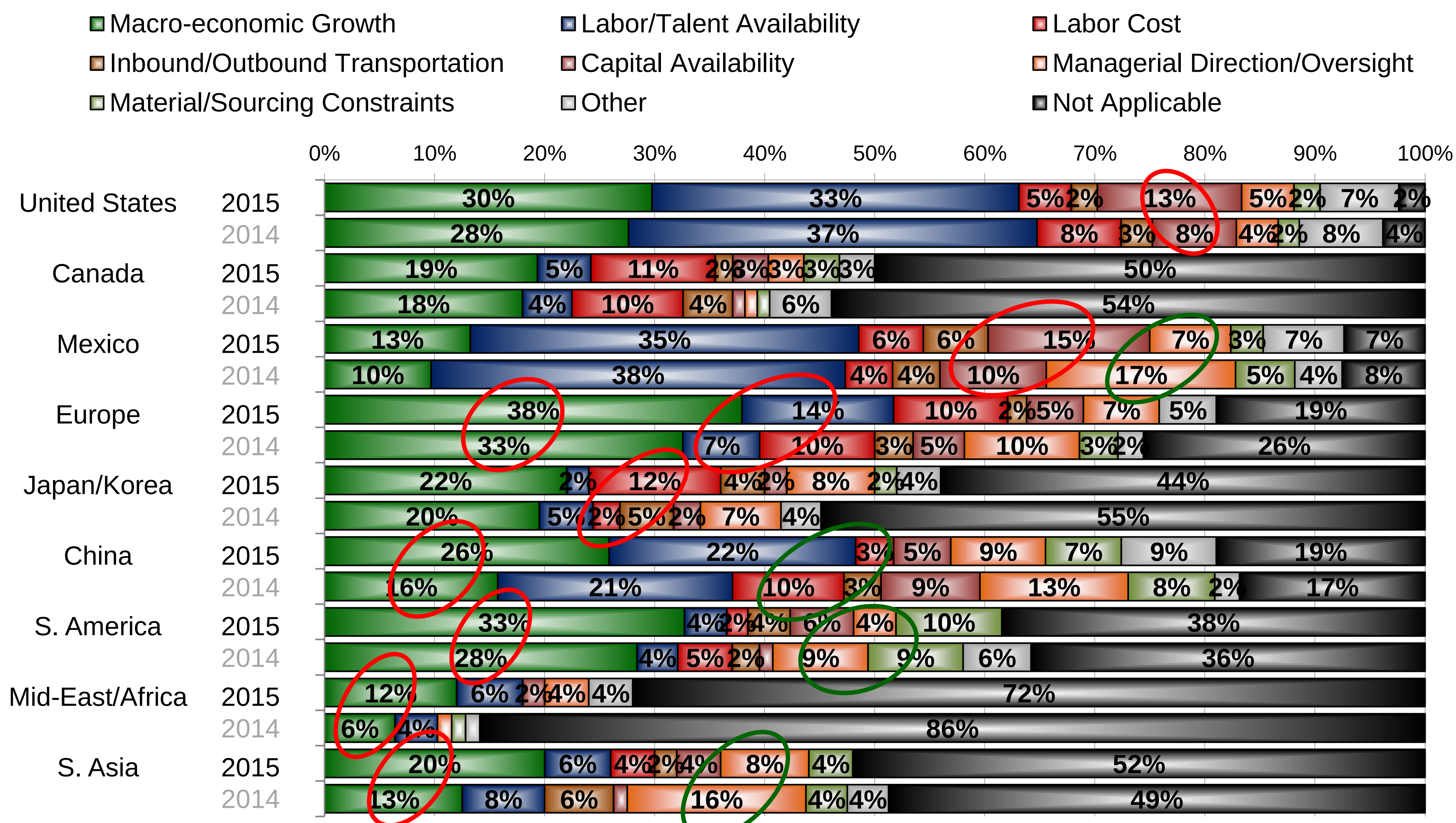
* +3 = Significant Growth, 0=No Change, -3=Significant Contraction
Not Applicable is not considered in the average growth rating value

Please elaborate on your growth/contraction plans.

Responses

- Mexico is booming but have concern over how much capacity is being installed.
- Will most likely build a greenfield iron foundry in Mexico by 2020.
- Plans to grow new products in U.S. Plans to grow capability and capacity in Mexico and Brazil.
- High labor content products moving to Mexico.
- Mexico and Eastern Europe have a huge growth potential. We will also increase our use of Chinese tool sources.
- Expanding Mexico and contracting Canada slightly to match OEM manufacturers plans.
- In general, impact of N.A. continued production growth and OEM rationalization/new plants to Mexico.
- Opening plants in Europe and Mexico in next two years.
- Growth on South East Asia, China and Mexico are focus areas.
- Two-thirds of new business is outside North America. China continues as a key growth area, and there are emerging opportunities in Africa.
- Weakness in the Euro has hurt our margins and made us less competitive.
- Europe is picking up a little faster than expected.
- New business awards and expansion of our business unit lines in China and Europe.
- We are focusing on increasing business in the Southeast U.S. region, and are reducing capacity in Canada.
- Our company's regional growth is aligning to the location footprint of our OEMs' assembly plants.
- Acquired new customers in each location.
- Mostly organic growth; slightly more in emerging markets.
- New business coming on board.

Select the most critical hurdle in meeting your 2020 growth strategies within each region.



2015 No. of Responses = 50-84
2014 No. of Responses = 78-105

Please elaborate on the critical hurdle in meeting your growth

United States:

- Growth in the U.S. continues to be tied to U.S. government policy/regulation.
- U.S. and China technical talent pools are limited.
- Cost pressures from automotive OEMs are making it impossible to compete from our U.S. location and costs associated with government regulations.
- Uncertainty regarding model mix, oil prices and CAFE regulation compliance.
- United States: health of customers.

China:

- In China, establishment of the correct business partners is key.
- China - low cost competitors with OEM support and technical assistance.
- For China, an effective sales and marketing strategy is key.
- China - our challenge is entering the market when there are differing safety standards among global regions.
- Chinese copy-cat suppliers threaten sales in China.

Canada:

- Canada needs a plan for the auto industry. They do not have one today and appear to be accepting of the ramifications.
- Currency fluctuations have been harmful in Canada. We are not a contract heavy business, and swings in the rate affect us greatly.

Mexico:

- Assessing the appropriate growth strategy for our Mexico expansion- green field, partnerships, JV, etc.
- Raw materials not available in Mexico and limited resin compounding available.

Please elaborate on the critical hurdle in meeting your growth (continued)

Europe:

- For European growth, establishing a cost effective regional manufacturing footprint is needed.

Brazil:

- Brazil - making it difficult to localize as the cost of importing the raw material outweighs the low labor cost in Mexico and almost offsets all of the very high import taxes that Brazil imposes.

Africa:

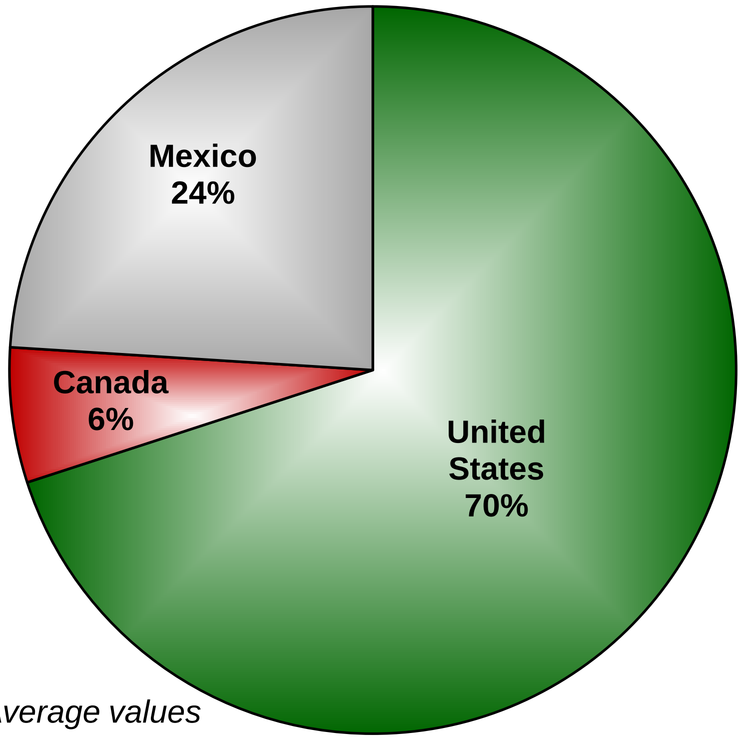
- Africa involves new business orders which lead to growth in that region.

Non-Specific:

- Need experienced people to meet the launch needs.
- Labor is available but at what cost?
- Struggle to find candidates to fill our open positions.
- Need to add plants, waiting on new sourcing to make final determination.
- Hard to find and keep good talent in such a STEM job seeker's market.
- In general, the major issues are developing compelling products and business cases to meet customer needs better than competitors.
- Government policy.
- What product lines to expand and how much capital to install in a crowded market.
- Further international growth hindered by current strength of U.S. dollar.
- OEM design direction and engineering strategy.

For your products produced in North America, identify the percent manufactured in each of the following countries.

Regional percent of manufacturing



Average values

	Number of respondent companies with mfg in each region	Range of mfg volume for these companies
United States	81	3-100%
Canada	23	5-100%
Mexico	54	2-100%

No. of Responses = 86

Do you expect these percentages to change significantly over the next 2 years? Please elaborate on regional directional changes and reasons for the changes.

Growth in Mexico:

- Mexico to increase. (9 similar comments)
- Not for the next two years but in the next 3 we will have manufacturing in Mexico.
- Mexico has 14 free trade agreements with 45 countries. This continues to affect growth of business in North America.
- Stronger support from Mexico.
- Yes. Mexico will grow more quickly.
- Only one plant in N.A. (Mexico).
- Some movement towards Mexico about 10 percent.
- Increasing percent in Mexico.
- Mexico will grow to somewhere between 10 and 20 percent.
- Increase shift towards production in Mexico.
- I expect no more than a 5 percent swing toward Mexico, but that is based on plant size and ability to handle more business within 2 years.
- Yes, we are just opening a plant in Mexico.
- Yes, could increase capacities in Mexico.
- Yes. We plan to establish manufacturing in Mexico.
- Mexico slightly higher.
- Not in the next 2 years but by 2020, 10 percent would be produced in Mexico.
- Expecting slight increase in Mexico.

Growth in the United States:

- We see more manufacturing moving to the U.S. as our customers are looking for suppliers to align their manufacturing footprint with the customers assembly plants.
- Potential plant addition in the U.S.

Growth in China:

- Yes, we will be looking at manufacturing in China.

Do you expect these percentages to change significantly over the next 2 years? Please elaborate on regional directional changes and reasons for the changes.

'Moving' comments:

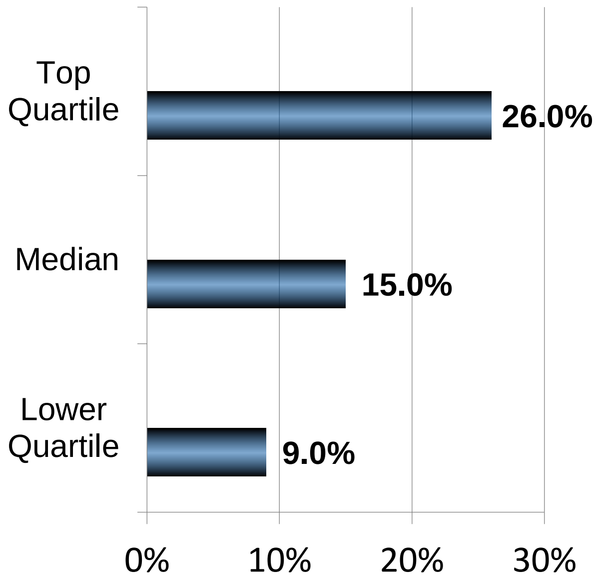
- Canada will reduce. Mexico will grow.
- With increase in OEM Mexico production we will have a shift from U.S. to Mexico and Canada is reducing OEM production.
- Yes, there is a potential shift to Mexico.
- Mexico increase and Canada decrease, because of OEM's direction.
- Overall strategy is to grow more in Mexico than in the U.S. so overall percentage will grow in Mexico and reduce in U.S.
- Mexico will increase and Canada will decrease. Moderate growth in the U.S.
- Yes in U.S. Some manufacturing is likely to be shifted to our Mexican site.
- Yes Canada is down but growth in U.S. and Mexico.
- Yes, moving some manufacturing close to customers.
- Anticipate that Mexico will grow and Canada will shrink.
- Less Canada, a lot more Mexico.

'No change' comments:

- No change (24 similar responses)
- No anticipated change in coming 2 years.
- No - for North America: our capital investment is in the U.S. and ours is a capital intensive product. Moving to Mexico does not cut costs significantly.
- No. Canada and Mexico are distribution points only for us.
- No. All of our work is done in the U.S, and is just freighted to the end location.
- If we are able to find the correct business opportunity in the U.S. and/or Mexico.

North American production that is exported outside of the United States

Estimate the percent of your current North American production that is exported outside of the United States (percent of dollar value).



Regional export value from the United States

	Lower Quartile	Median	Upper Quartile	Number of respondent companies exporting to each region
Canada	15%	25%	39%	43
Mexico	20%	40%	67%	55
Europe	10%	20%	34%	54
Japan/ Korea	6%	11%	24%	28
China	7%	10%	25%	43
S. America	5%	10%	21%	28
Mid-East/ Africa	2%	2%	3%	4
S. Asia	5%	6%	17%	15

No. of Responses = 82

Please describe the direction (indicating an increase/decrease) by region of your export plan and what major factors drive that direction.

Increasing exports:

- Increase in Mexico. (3 similar responses)
- China continued expansion. (3 similar responses)
- Growth for Mexico export to Europe and Asia resulting from global platform sourcing.
- We will continue to export more from U.S. to Canada and Mexico. Other parts of the world are supplied through other global plants.
- To Brazil from Mexico.
- Mexico with more OE production.
- Asia-Pacific: Increase from localization project.
- North America: New program launches.
- Until manufacturing site is established is Europe, exports from N.A. will rise, later to be replaced by regional supply.
- We are working on a project to grow in China via our sister company located in Wuxi.
- Customer locations drive the increase in Japan/Korea and Mexico with a slight increase in Europe and Canada due to economics.
- While we have seen a slight decline in revenue in Mexico due to recent macro-economic factors, we believe the trend remains positive and our plans are to focus more resources in that area over the coming years.
- We expect to see Mexico and Central America grow, but still remain a very small percentage of our volume.

Please describe the direction (indicating an increase/decrease) by region of your export plan and what major factors drive that direction. (continued)

Decreasing exports:

- Expansion in Mexico will decrease export from U.S. (3 similar responses)
- South American volume down.
- China will export less to North America as Mexico plant comes online.
- Lower in Canada.

Localization:

- Our strategy is to localize when possible and when not possible, we will then export to countries that we are not able to manufacture in.
- Decrease - driven by localization.
- I expect these numbers will all shrink as a percentage of total sales, and that is due to localization efforts.
- Exports in general will reduce due to growing investment in local regions for domestic sourcing.
- Decrease due to localization in the customer region.

No change:

- No significant change. (3 similar responses)
- Not applicable. We produce in various countries for consumption in that country.
- No plans to export from N.A. Only special cases for various reasons. Generally manufacture in the local region.
- Europe-flat.
- Asia will not change.

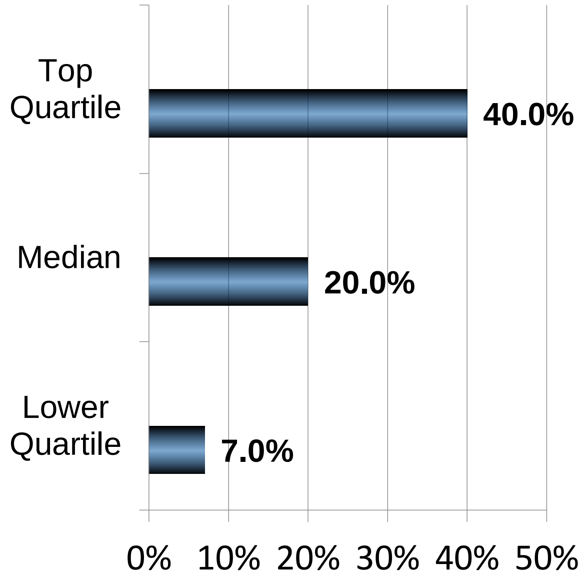
Please describe the direction (indicating an increase/decrease) by region of your export plan and what major factors drive that direction. (continued)

Other general responses:

- We will see an increase to Korea and Southeast Asia due to application of our products to customer global platforms.
- We continue to produce our product in those regions we have investment and partnerships in. We ship our product to wherever the customer chooses to work. Our product uses tend to chase low labor more than our industry does.
- There is no export plan per se. It all depends on the OEM and its product mix and location.
- Majority of production for use in same region.
- Simply following the regions where automotive component manufacture is transitioning to.
- Technical capability.
- Our direction is to export as little as possible.
- Attractive pricing, reluctance of customer to not tool up again in other regions to save tooling costs.
- Customer diversification.
- Growth of proprietary products.
- Currency.
- Labor cost and quality.

Material costs for North American production that is purchased outside of the United States.

Estimate the percent of your current material costs for North American production that is purchased outside of the United States (percent of dollar value).



Regional purchase value outside of the United States

	Lower Quartile	Median	Upper Quartile	Number of respondent companies purchasing from each region
Canada	10%	18%	31%	24
Mexico	13%	27%	55%	26
Europe	11%	22%	60%	43
Japan/ Korea	11%	29%	67%	35
China	16%	30%	55%	51
S. America	5%	10%	20%	9
Mid-East/ Africa	8%	10%	10%	5
S. Asia	10%	25%	43%	20

No. of Responses = 82

Please describe your company's material purchasing direction (indicating buying more/buying less) by region and what major factors drive that direction.

Regional Responses

- China focus and finding an onshore N.A. option.
- We are seeing a moving trend of more purchases coming from Europe and India than in the past due to the recent competitiveness of the market mostly driven by currency exchange rates. This has been the trend over the last 12 months and continues. We are also seeing a trend of fewer purchases coming from China as the competitiveness has continued to decline and also due to logistics costs, we are able to procure in North America at a localized rate as competitive.
- Want to buy steel and forgings from North American suppliers, however price is high and low interest on their part.
- We buy a lot of electrical components from Asia.
- Probably buy more from China as we develop local suppliers, and will add some purchases from India.
- Buying more from lower cost region. Increasingly buying from China.
- Increasing spend from Asia (cost reason) and North America (minimizing supply chain risks).
- More in N.A.
- Shift to Asia due to competitive situation.
- As sales grow in each region and manufacturing footprint shifts to a more regional one, purchases will grow in Europe and Asia.
- Directed buys for components in Japan and China.
- We buy tools from Asia and plan to buy a larger percentage. Raw material all comes from U.S.
- We have increased our domestic purchases this year, as well as increasing our business in Asia. We expect this to continue.
- More material will be purchased in the U.S. and Mexico as we execute on our regional expansion plans.
- Eighty percent of our pig iron comes from Russia/Ukraine, more volume will shift to Brazil due to the political unrest.
- Customer directed buys influence regional purchases outside of the U.S. Otherwise, we buy in U.S./Canada.
- Buying less outside of U.S.

Localization:

- Increase in Korea from localization project.
- Try to localize everything, capability of local suppliers can be hurdle.
- Globally sourced / regionally bought.
- The direction is to find regional suppliers to our production facilities.

Please describe your company's material purchasing direction (indicating buying more/buying less) by region and what major factors drive that direction. (continued)

Localization: (continued)

- Continue buying majority of regional requirements from suppliers in that region with focus on low cost countries (e.g. eastern EU for EU).
- Our strategy is to localize when possible based on quality, availability, cost, timing, etc.
- Buy in the region we are producing in.
- We try to buy locally whenever possible to avoid logistic issues and costs.
- We still want to buy and sell in the same region.
- Buy regionally. (2 similar responses)

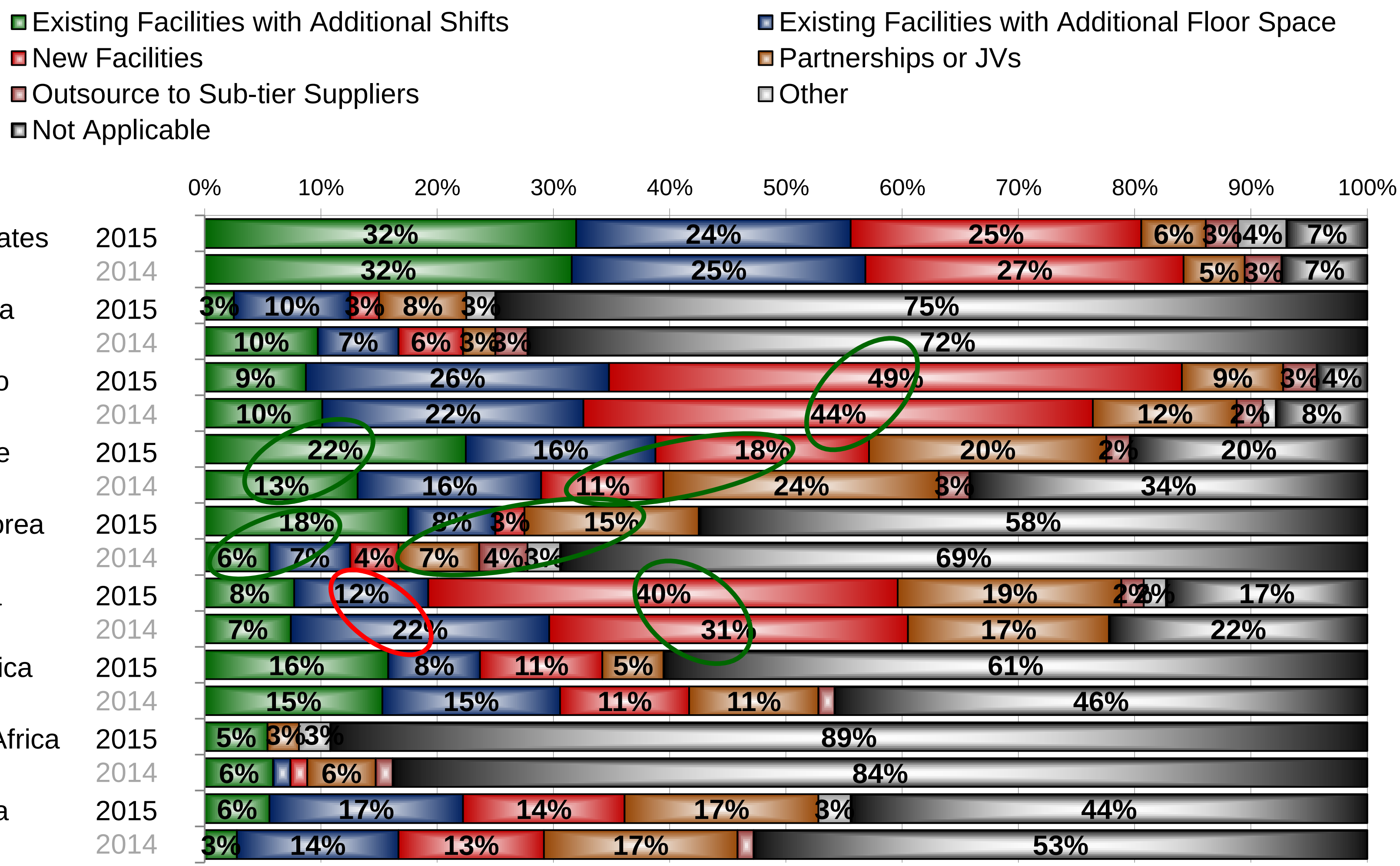
General Responses:

- We will continue to purchase from those companies that provide the best value, regardless of where they manufacture.
- Technology.
- Logistics drives sourcing.
- Price.
- We buy from the best suppliers that have the best quality, price and overall costs regardless of location.
- Most of sourcing offshore is directed buys from our customers.
- Cost effect, assuming quality is given.
- Suppliers are first qualified and deemed reliable. Then, sourcing decisions are taken on a landed cost basis.
- Currency fluctuation.
- Currency.
- Using outside resources to broaden our international supply base well beyond our traditional N.A. suppliers.
- Buying more. (2 responses)

No change:

- No change. (6 responses)
- Roughly consistent with existing buys. EU purchases primarily directed components from OEMs.
- Due to the high content of electronics in many of our products, we see the split of purchases staying very similar.
- No change due to most of these products being electronic components.

Where production capacity needs to increase, identify your most significant strategy to increase production within each region.



2015 No. of Responses = 36-72

2014 No. of Responses = 68-95

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Please elaborate on production capacity expansion plans.

Responses:

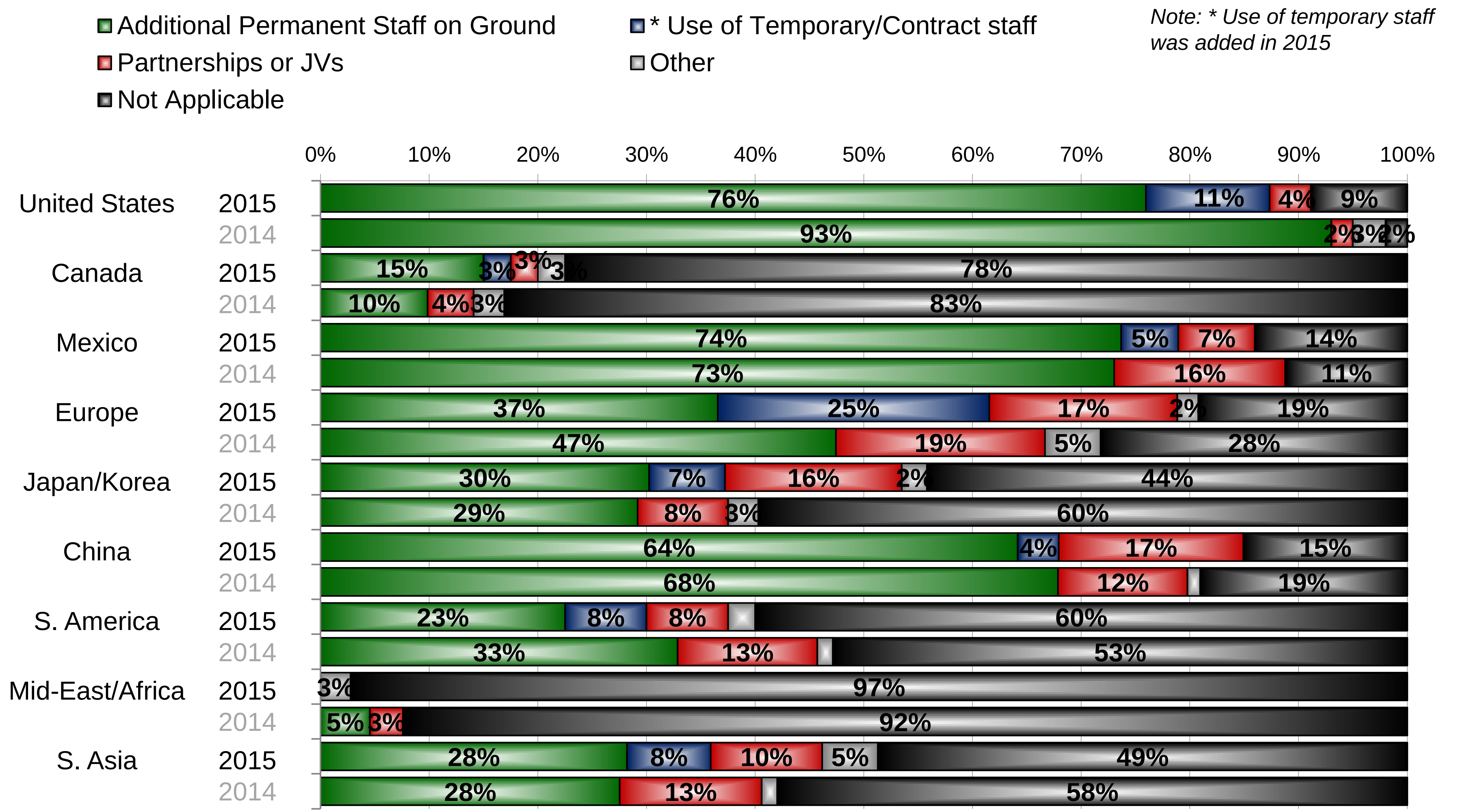
- In N.A.-investments in higher throughput equipment/flexible equipment to support growth with existing footprint. China outlook is far outpacing the market and additional facilities are required to support the demand.
- Expansion already done in South Asia.
- Expansion in eastern Europe, Mexico, South America, and U.S.-costs are a huge driver. Our OEM customers want local content, but price usually wins out every time.
- Localizing/vertical integration in China.
- Looking to partner in China and add a factory in Mexico.
- We continue to balance capital expenditures and current capacity.
- Focus in Mexico and China.
- Strategy is to expand in countries that are considered low labor rates with the potential to expand facilities in those regions.
- Additional plants planned only for largest growth regions.
- Limited brick and mortar commitment.
- Mexican site floor space will be increased by transitioning current office space to manufacturing space and relocating office employees. In China, first current space will be expanded but relocation to lower cost region is being considered. Expansion of current European manufacturing site versus establishing a new site is being evaluated.
- Bringing some work in-house that was outsourced so we can control growth.
- We want to customize our facilities to our needs.
- Will expand our Mexico facility in 2015.
- We are able to handle most expansion via better machine utilization and adding shifts.
- Request for localization from OEMs.

Please elaborate on production capacity expansion plans. (continued)

Responses: (continued)

- Move to regional facility.
- We are debating whether to invest in space efficiencies in our current facility, or design a custom facility that will be more in line with our current production needs. We are leaning toward new facilities.
- We are a Korean company trying to grow in North America. We are well placed in Asia and have partnerships in Europe.
- Pursuing local Class-A stamping and assembly business.
- We find it increasingly difficult to field a workforce in our U.S. operations. Government entitlements coupled with a waning work ethic among millennials is crippling our ability to field a team on a daily basis.
- Carefully adding floor space in northern U.S., eastern U.S. and northern Mexico. Also, upgrading production equipment within same floor space to increase productivity.
- Equipment upgrades with higher efficiency.
- New plant in Alabama.
- Potential for new/upgraded capital.
- No capacity expansion plans.

Where engineering capabilities need to increase, identify your most significant strategy to increase engineering support within each region.



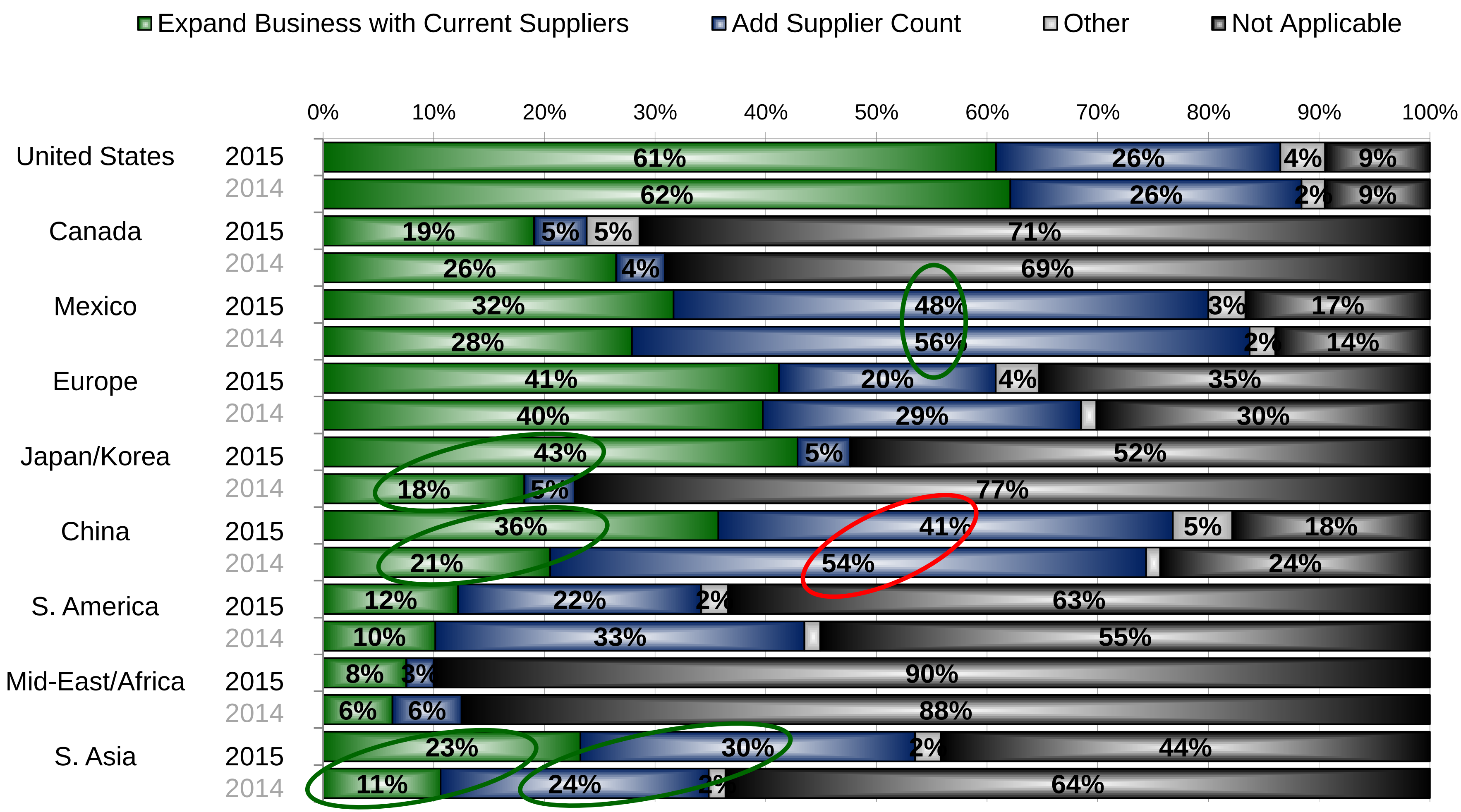
2015 No. of Responses = 36-79
2014 No. of Responses = 66-100

Please elaborate on engineering capability expansion plans.

Responses:

- Mainly in China and Brazil.
- Relocation of existing roles from HCC to LCC within Europe.
- Acquisitions.
- Adding permanent resources in all our regions even China.
- Need to continue to find good technical people.
- In emerging regions/low labor cost areas, we will add permanent headcount. In developed/high labor rate areas, we will bridge the gap with temporary help until the emerging/low labor rate areas are up and running at an acceptable level.
- Current design centers are all North American based. As manufacturing footprint shifts, global design centers for each product will be established in other regions.
- We may be sending engineers from the U.S. to these other locations.
- We are a technology-heavy manufacturer. It is important for our employees to have a long-term buy-in.
- Localization next to the OEMs.
- Supply engineering regionally.
- Looking for M&A in Mexico.
- Aggressively building our staff in India.
- Add design engineers.
- No engineering capability increase planned.

Where production component/systems sourcing capacity needs to increase, identify your most significant strategy to increase your supply chain within each region.



2015 No. of Responses = 40-74
2014 No. of Responses = 64-95

Please elaborate on sourcing capacity expansion plans.

Responses:

- Increasing strategic relationships/partnerships with current and new suppliers.
- Technical solutions and sources continue to evolve with innovation.
- To support growth plans, we will identify and develop new suppliers to add to our supply base.
- In Europe, correct supply base for regional commodities is needed. In China, appropriate supply base needs to be confirmed; some new supplier will be added and inappropriate suppliers will be exited.
- We have many suppliers around the globe, so we will have no issue sourcing components/materials.
- We need more tooling sources in North America and Europe. China can be managed with current supply base.
- Moving to global supply base.
- We periodically study relevant, potential suppliers and update our supplier panel accordingly. For the most part, we continue to work with existing suppliers but will add a new supplier from time to time.
- Raw material constraints.

Thank you for your participation

The OESA Automotive Supplier Barometer survey is published every other month. The next survey will be launched on Monday, July 6, 2015 and will be released Friday, July 10, 2015.

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