

The U.S. Automotive Market

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AUTO ALLIANCE
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U.S. Sales: Recovered from Recession Lows



The record for U.S. auto sales was 17.8 million in 2000

2015 U.S. Sales Forecast Looks Higher



17.4 Million



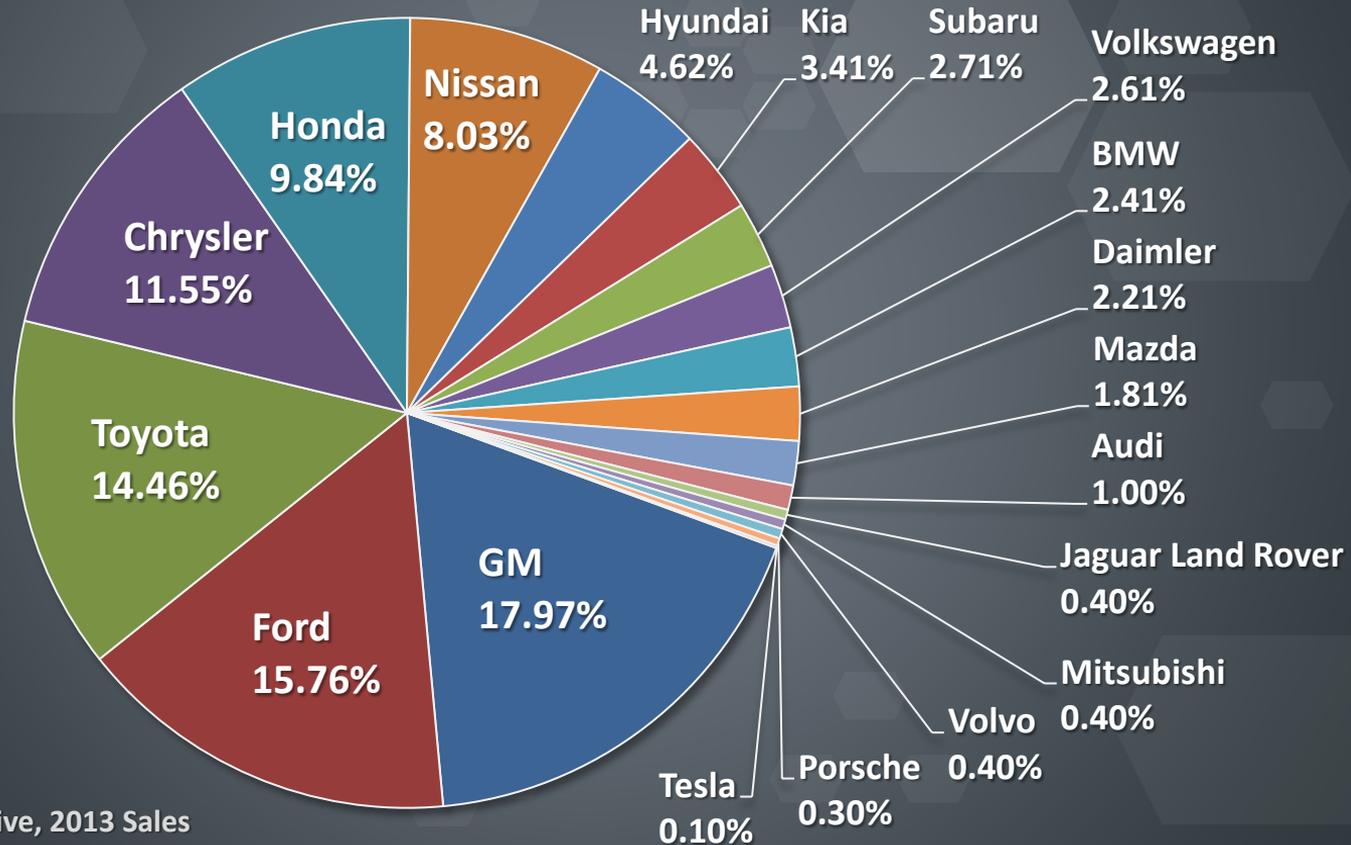
17 Million



16.7 Million

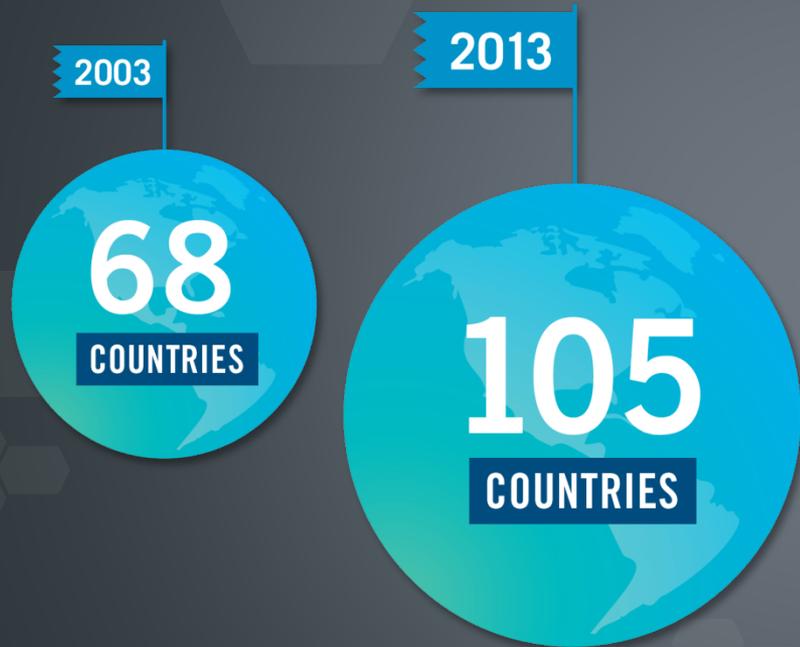
With a forecast average of 17.03 million sales in the U.S., this will be the most autos sold since 2003 (16.96 million)

U.S. Market Share by Manufacturer



Source: Ward's Automotive, 2013 Sales

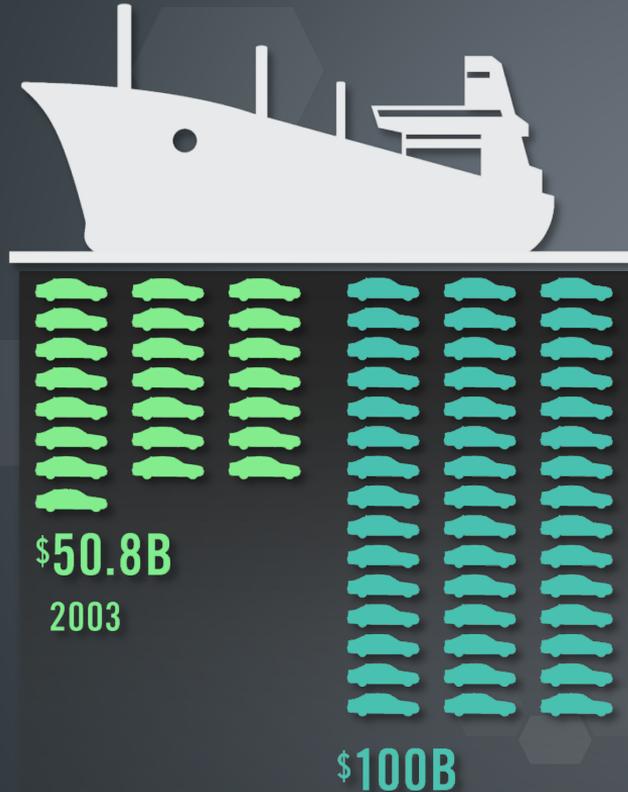
More Countries are Importing Auto Products from the U.S.



A decade ago, 68 countries imported substantial amounts of American auto products (\$10 million or more).

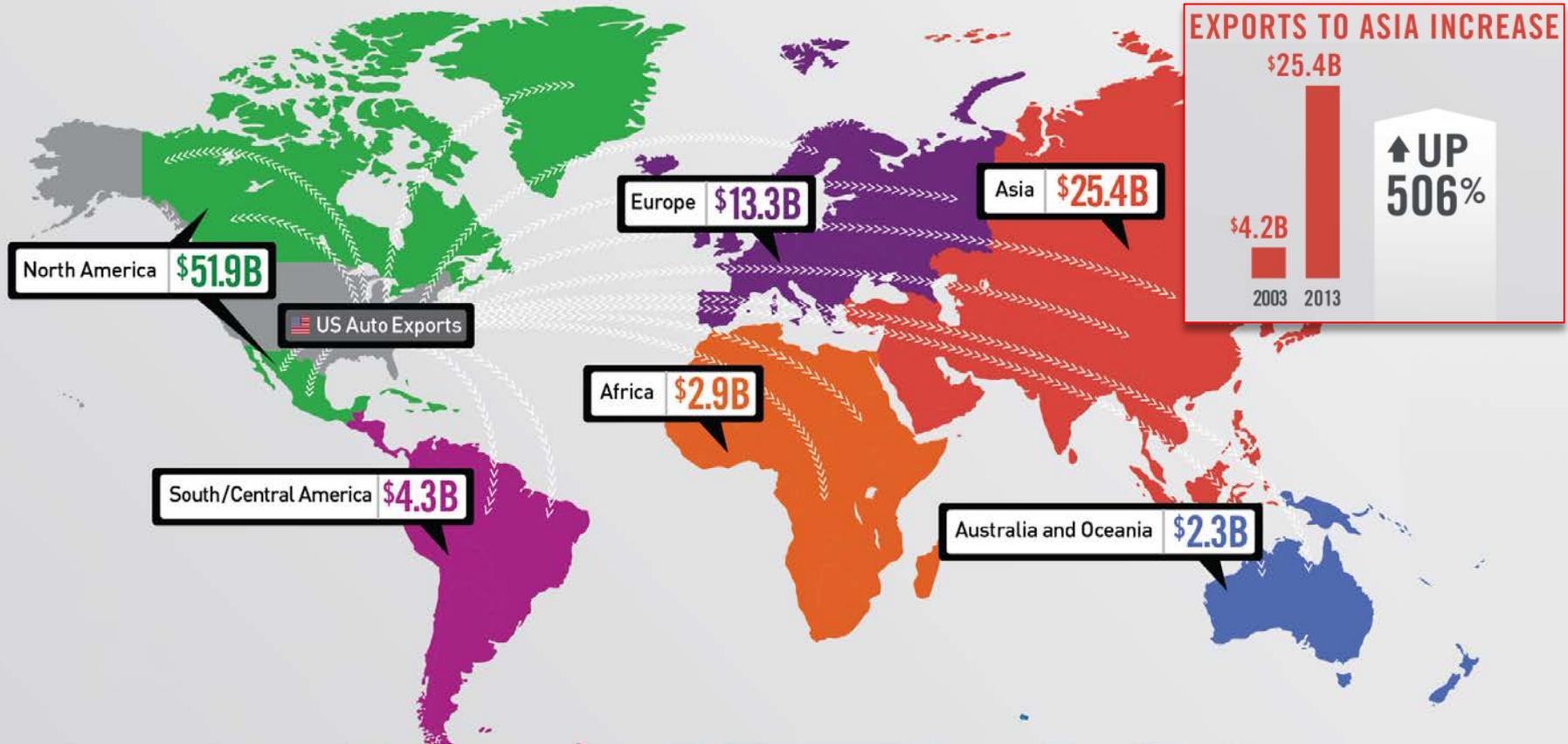
In 2013, 105 countries imported \$10 million+ of auto goods from the U.S.

Auto Exports Have Doubled in Dollar Value



In 2013, exports of cars and parts valued at \$100 billion were shipped from U.S. ports—almost double the \$50.8 billion of auto products exported from the U.S. a decade earlier.

U.S. Auto & Parts Exports by Region





Green Cars

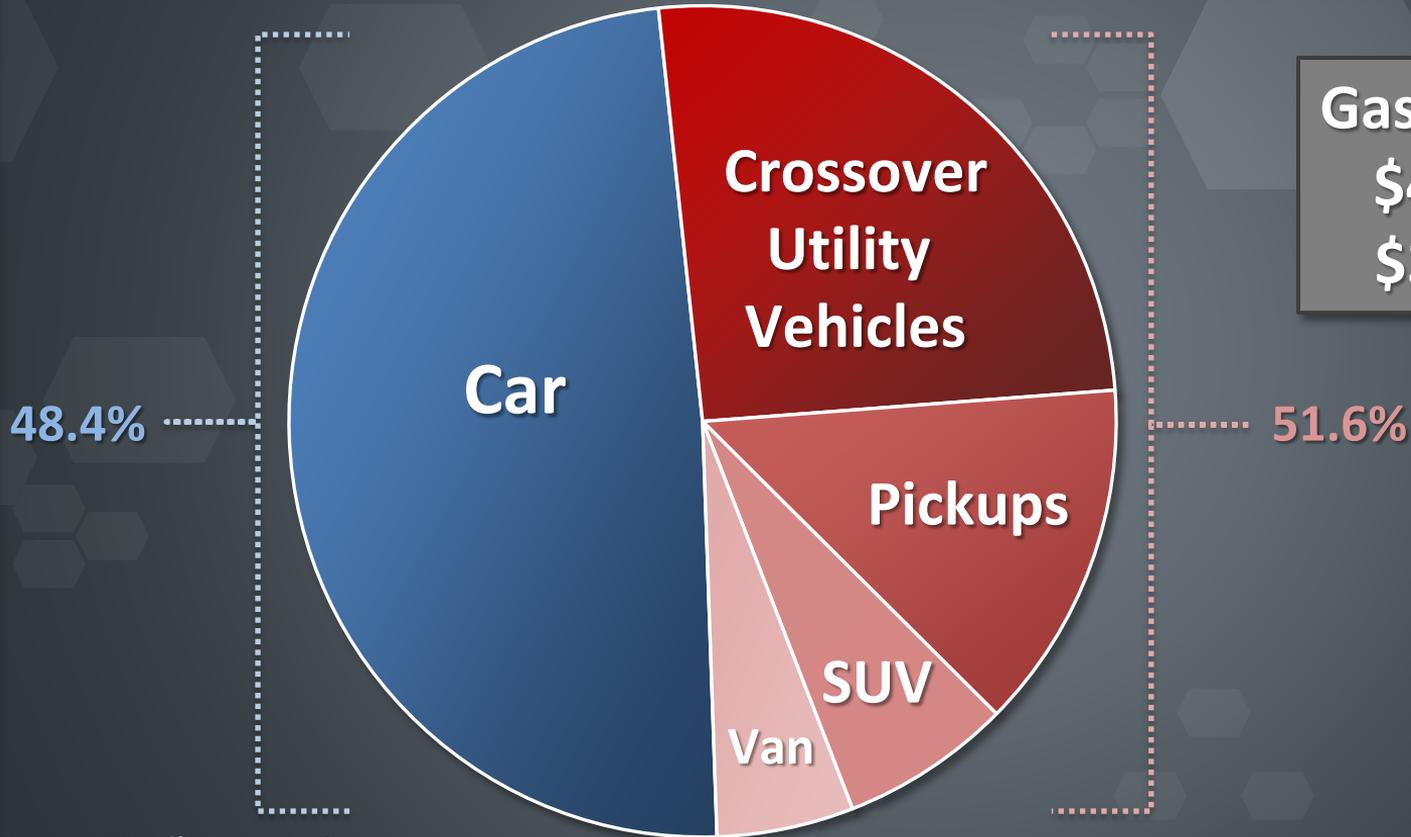


More High-Mileage Autos Available to Consumers

Models Achieving 30 MPG or More (Highway): 2006-2014



U.S. Vehicle Sales By Segment (2013)



Gas is down from
\$4 a gallon to
\$3.25 a gallon

Green Cars on Sale Today in the U.S.

50

Models of Hybrids



35

Models of Diesels



14

Models of BEVs*



10

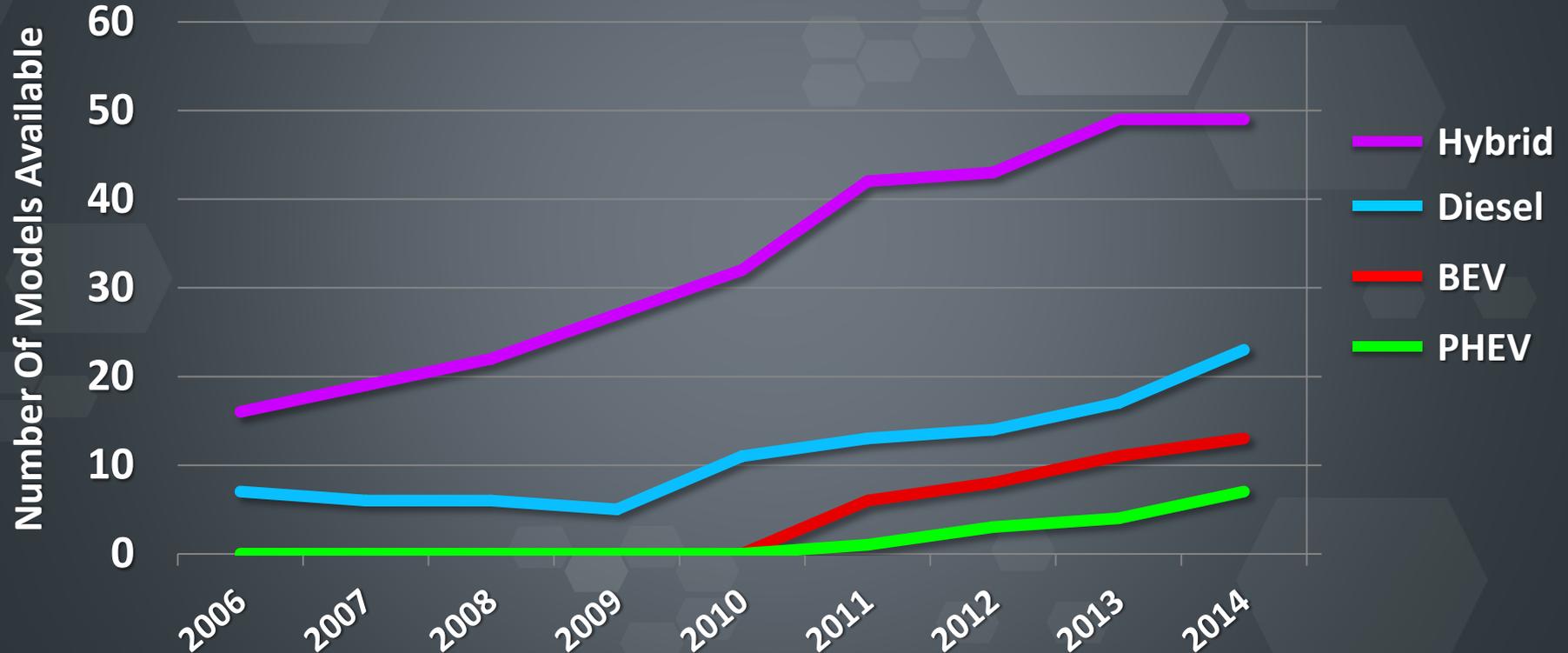
Models of PHEVs**



* Battery Electric ** Plug-In Hybrid

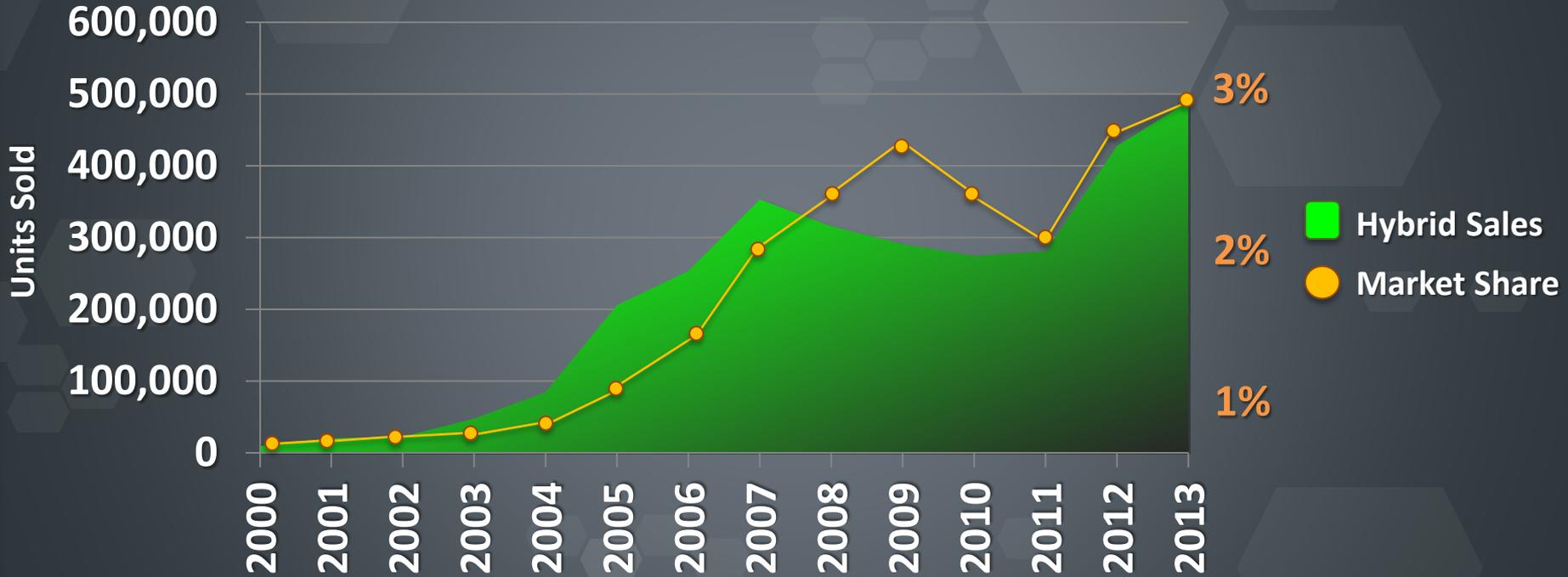
Sales Rise: Hybrids, Diesels and Electric Vehicles

Increase in Alternative Fuel Models: 2006 - 2014



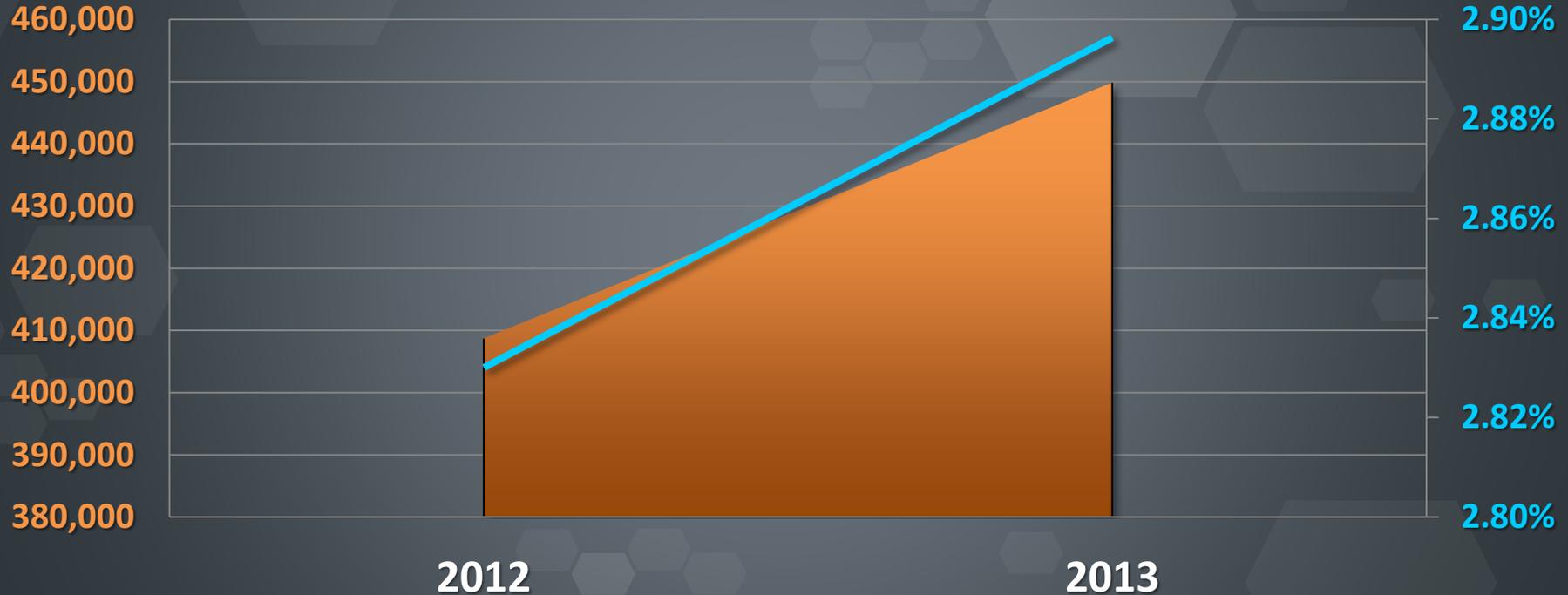
Hybrid Sales Grow but Still Low

U.S. Hybrid Sales over 13 Years



Clean Diesel Vehicle Sales Grow but Still Low

Increase In Diesel Sales and Market Share: 2012-2013



Source: Ward's Automotive

 Sales  Market Share

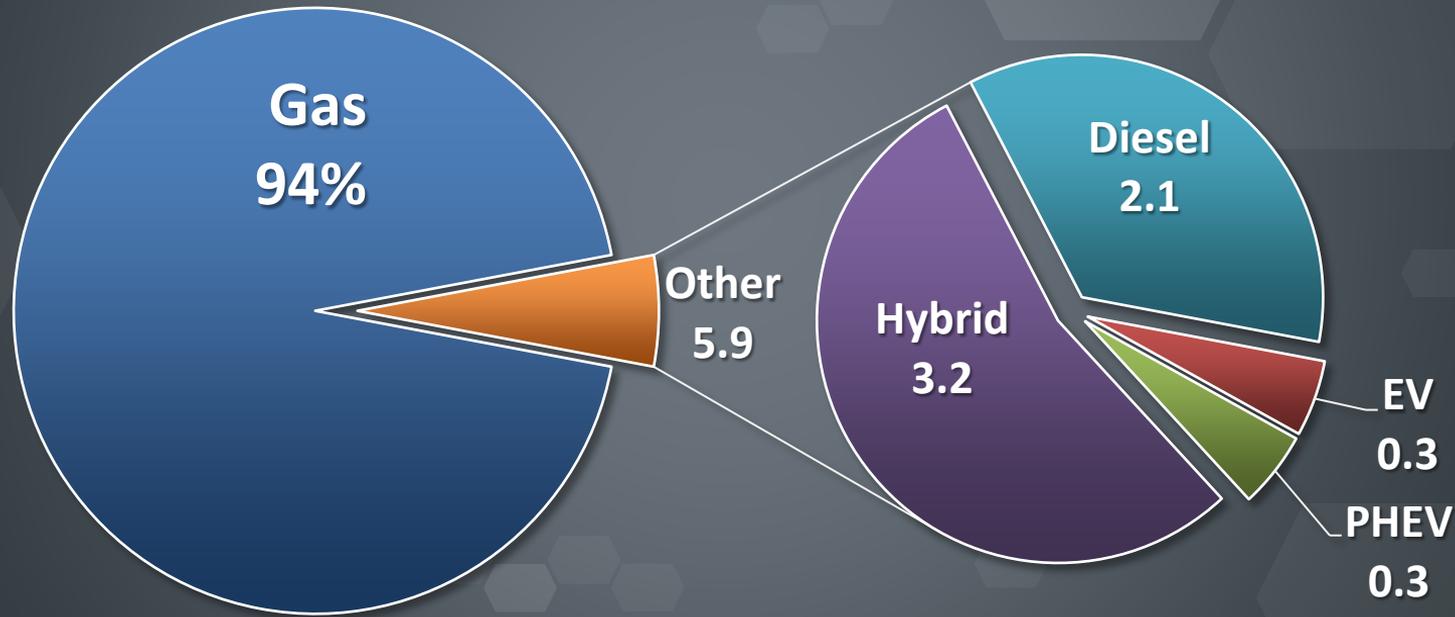
Sales of EVs and PHEVs Grow but Still Low



Source: Ward's Automotive

The Gas Engine is Still the Top Choice

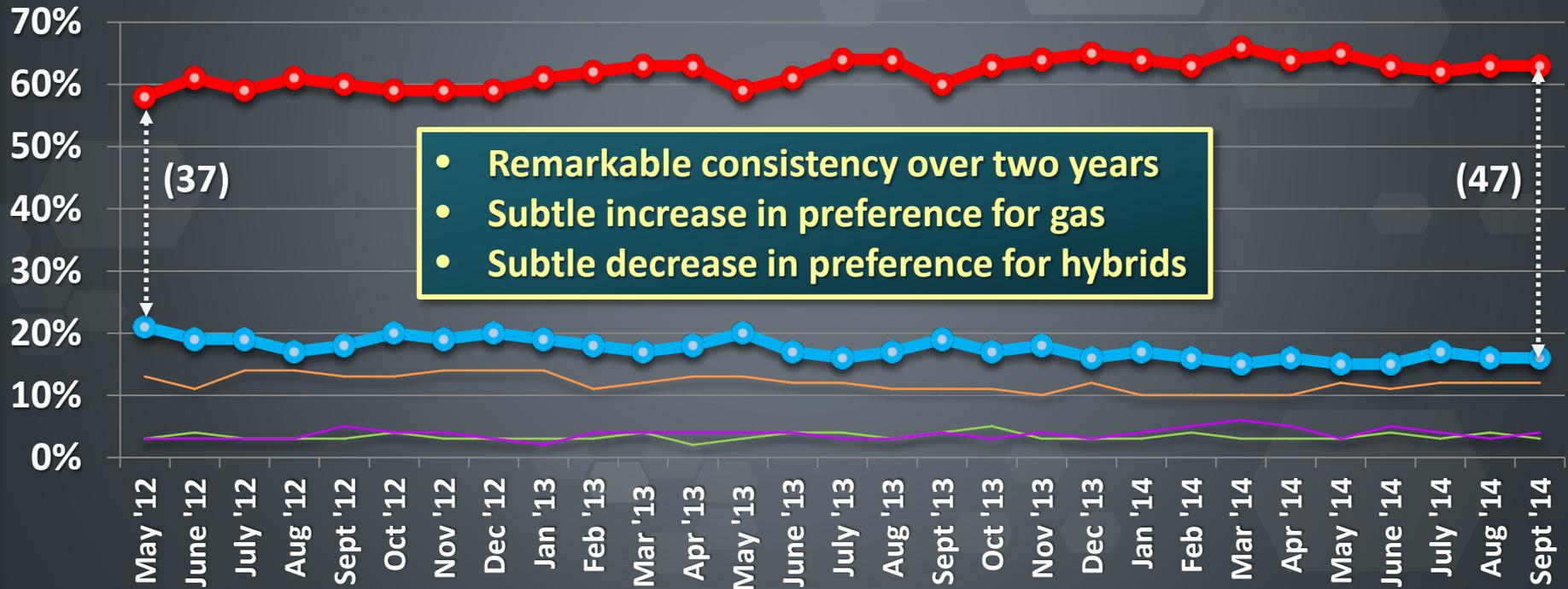
2013 U.S. Passenger Vehicles by % Power Type



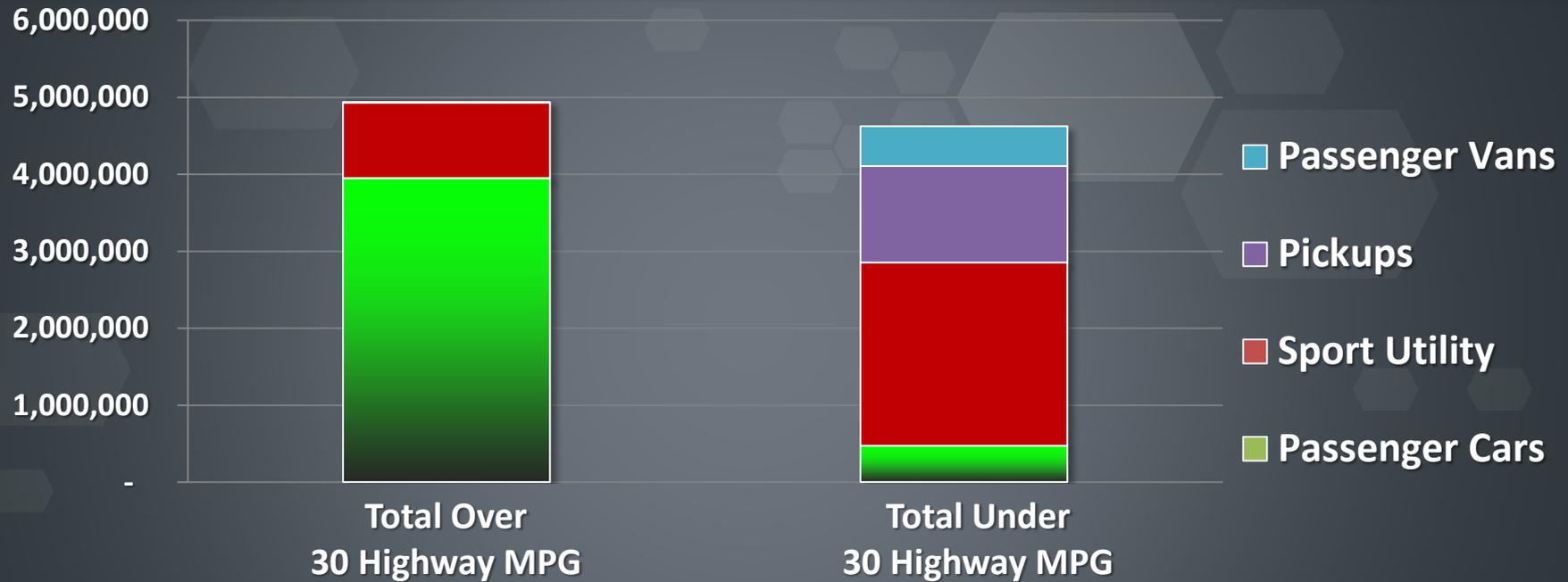
Success with Gas Powertrains Inhibits Appetite to Switch

What Type of Engine Will Your Next Vehicle Be Powered By?

● Gasoline ● Hybrid ● Diesel ● Electric ● Not Sure



MPG of New Passenger Vehicles By Vehicle Type



52% of new vehicle sales get highway MPG of 30 miles+. Of the top body styles, 89% of passenger cars and 29% of SUVs sold this year get 30 highway MPG. No pickups or passenger vans reach 30 highway MPG.

Making Autos Lighter: Aluminum

A recent study finds that every leading automaker will have numerous aluminum body and closure programs by 2025.

As the material mix for body and closure parts continues to change dramatically in the years to come, use of aluminum sheet for vehicle bodies will increase to 4 billion pounds by 2025, from 200 million pounds in 2012.



2015 Ford F150 with Full Aluminum Body

Data Available to OICA Members

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Access the 2014 Facts & Figures at
www.wardsauto.com/autoalliance14

Use Promo Code: Facts14AA63