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Welcome

2020 Post-Election Automotive Outlook



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2020 Post-Election Automotive Outlook

Opening Remarks



Our Agenda

Kristin Dziczek, Vice President – Research, Center for Automotive Research

Brett Smith, Director, Technology, Center for Automotive Research

Bernard Swiecki, Director, Automotive Communities Partnership (ACP) and Assistant Director – Research, Center for Automotive Research

Howard Wood, Executive Director, DriveOhio

Elaine Bryant, Executive Vice President for Aerospace and Defense, Dayton Development Coalition Federal & Military Installation Sector, Managing Director, JobsOhio

Kristina Clouse, Senior Managing Director, Talent, JobsOhio



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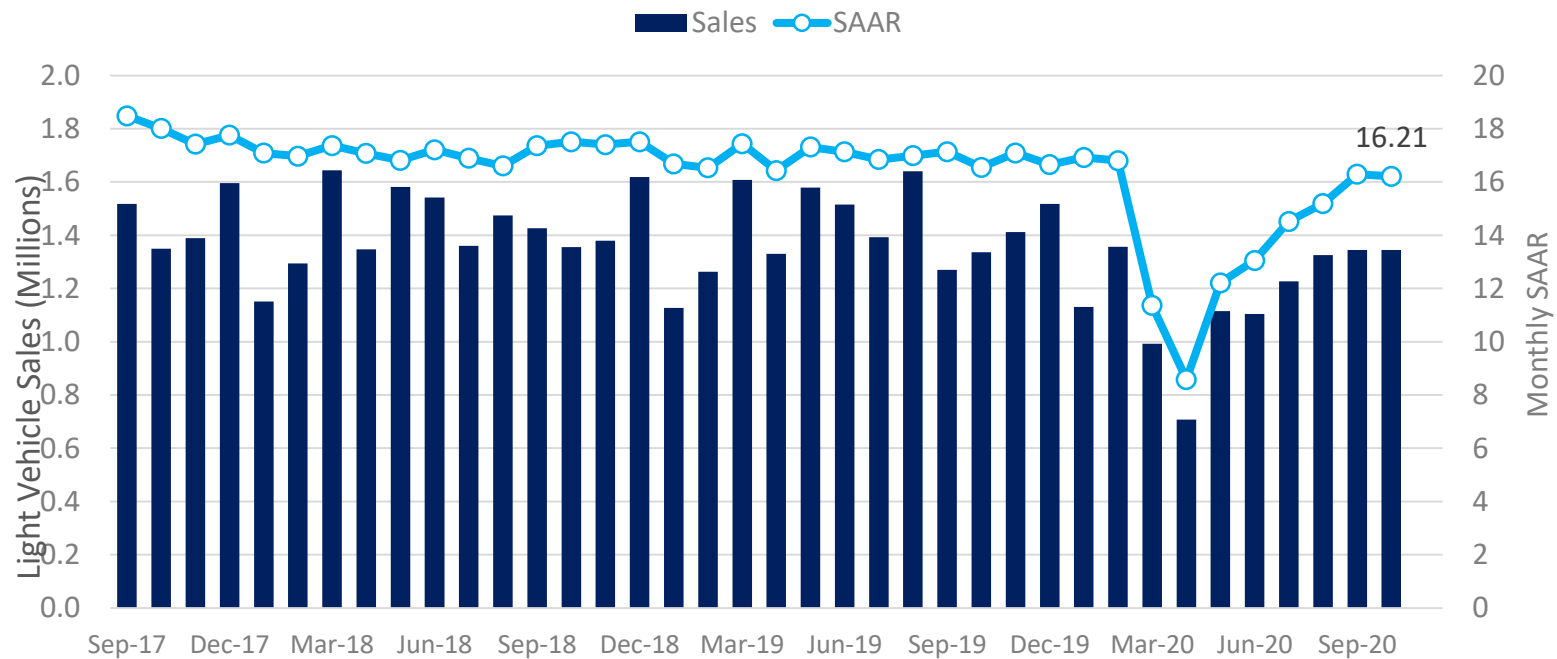
2020 Ohio Post-Election Automotive Outlook

State of the Automotive Industry

Bernard Swiecki – Assistant Director, Business Group

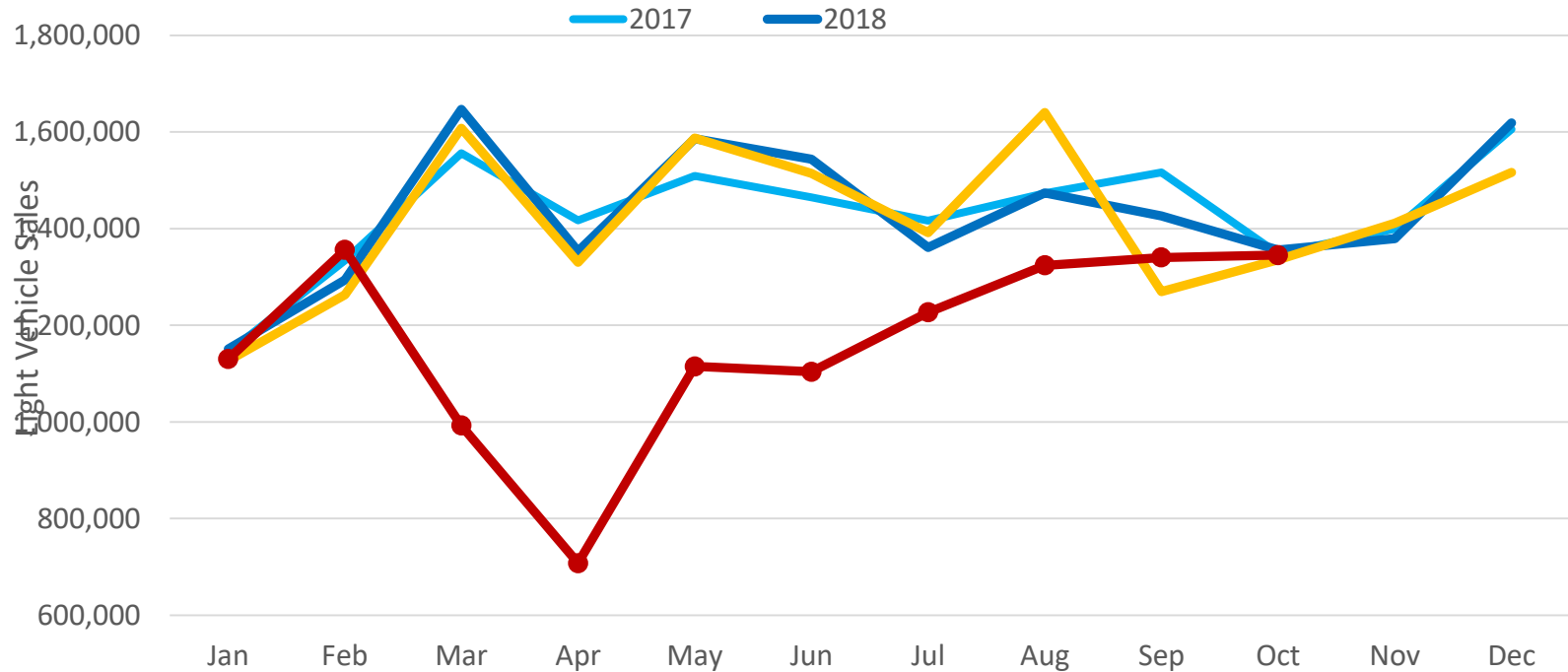
17 November 2020

U.S. Light Vehicle Monthly Sales and SAAR: September 2017 to October 2020



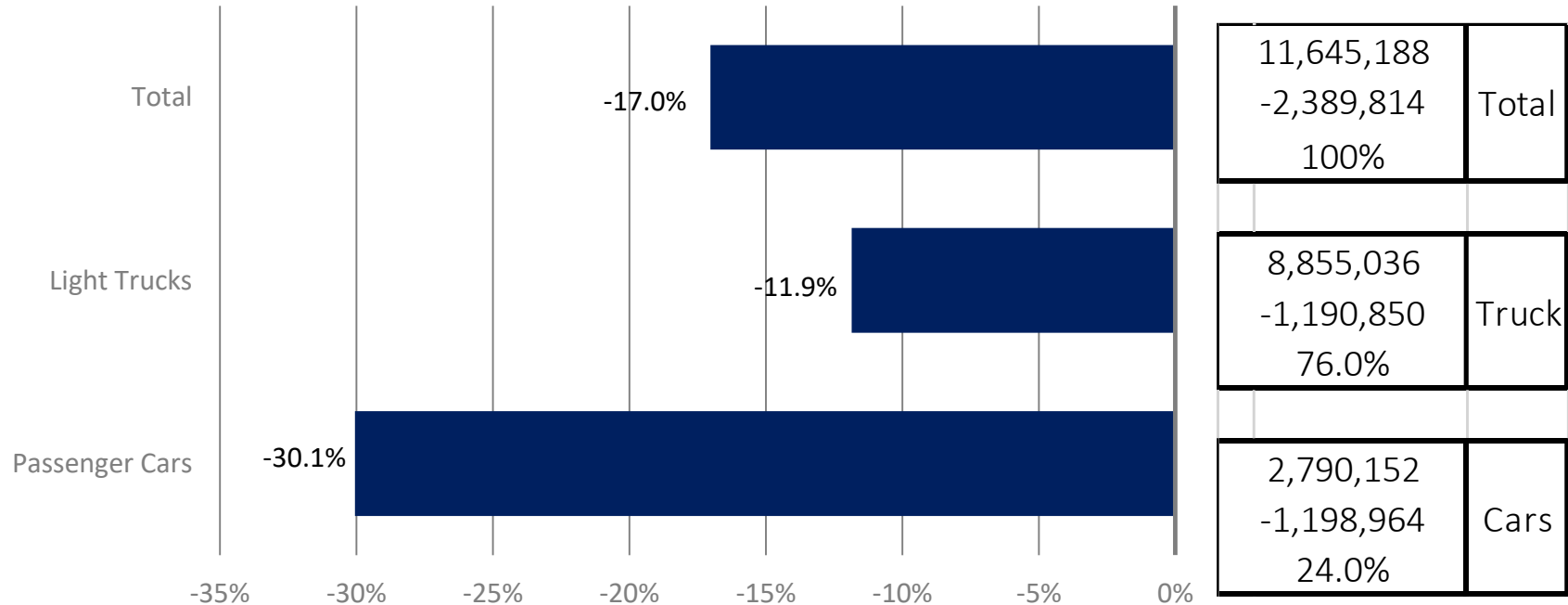
U.S. Light Vehicle Monthly Sales

January 2017 – October 2020

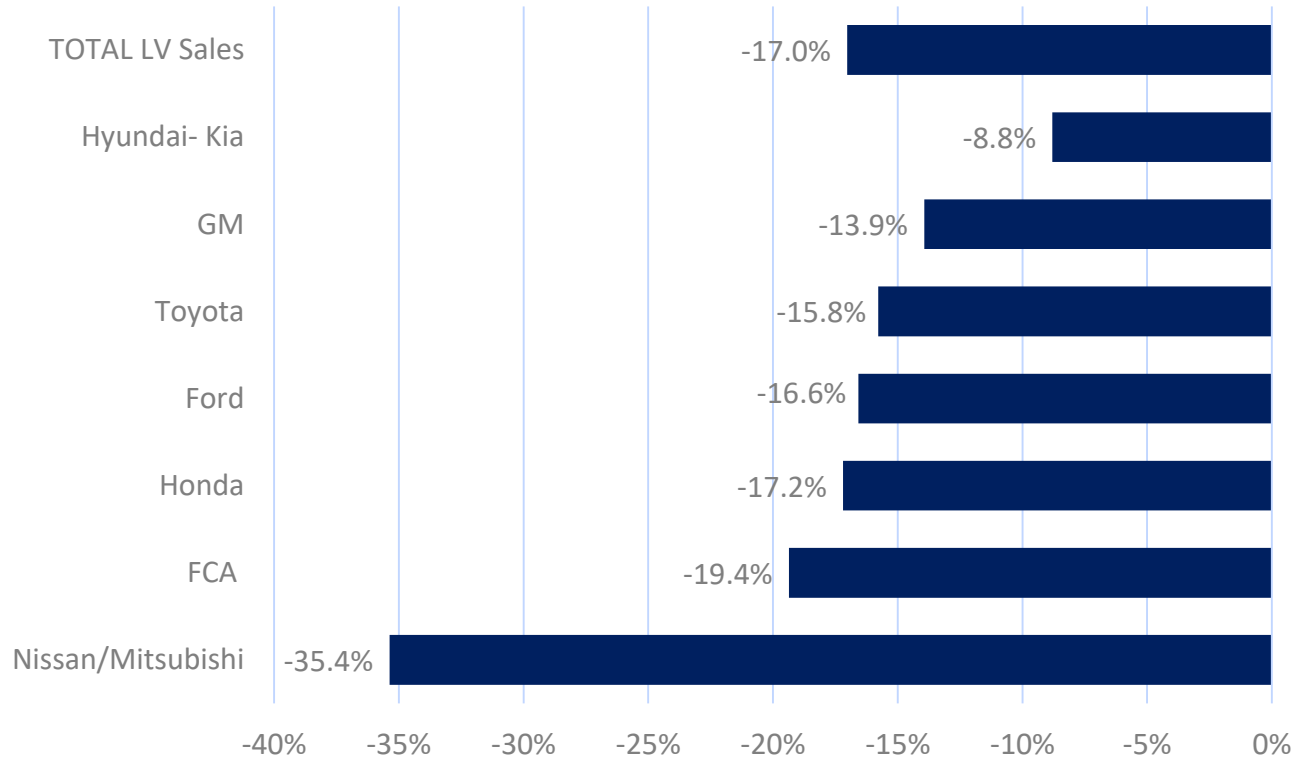


U.S. Light Vehicle Sales

Percent Change (YTD) Through October: 2020 vs. 2019

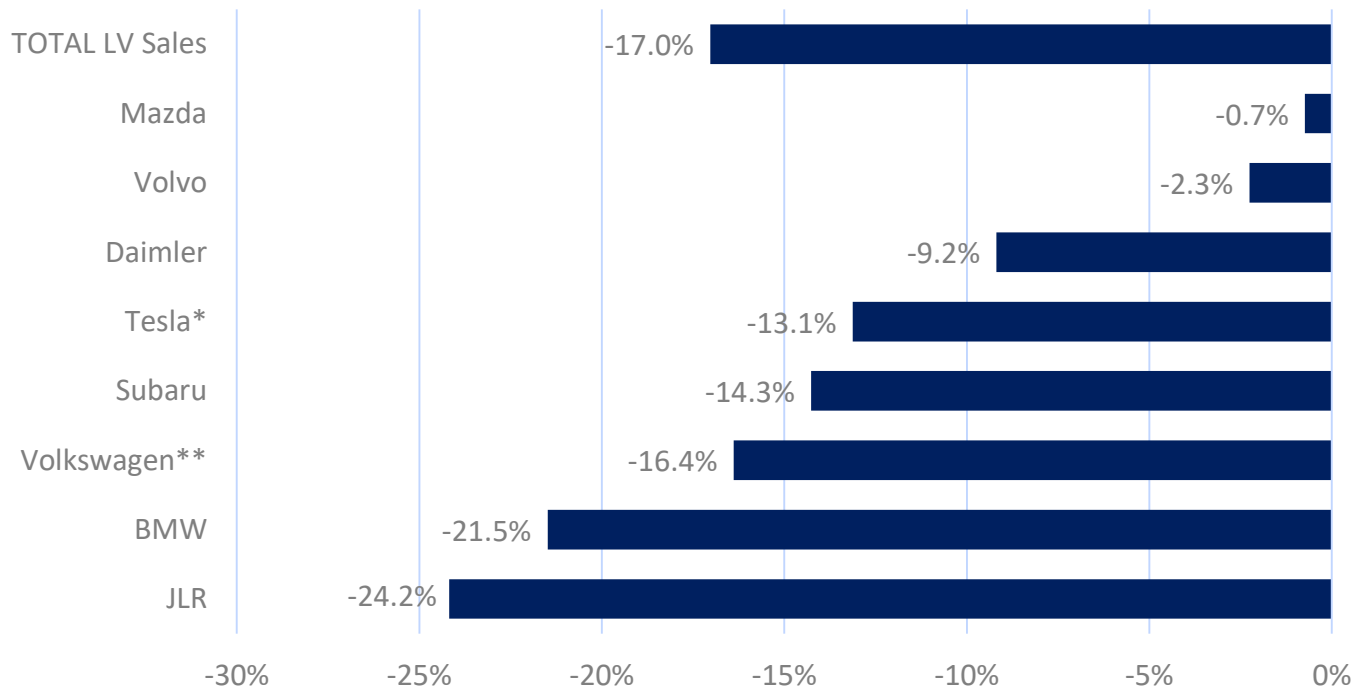


Percent Change in Sales of Light Vehicles Per OEM: YTD Through October: 2020 vs. 2019



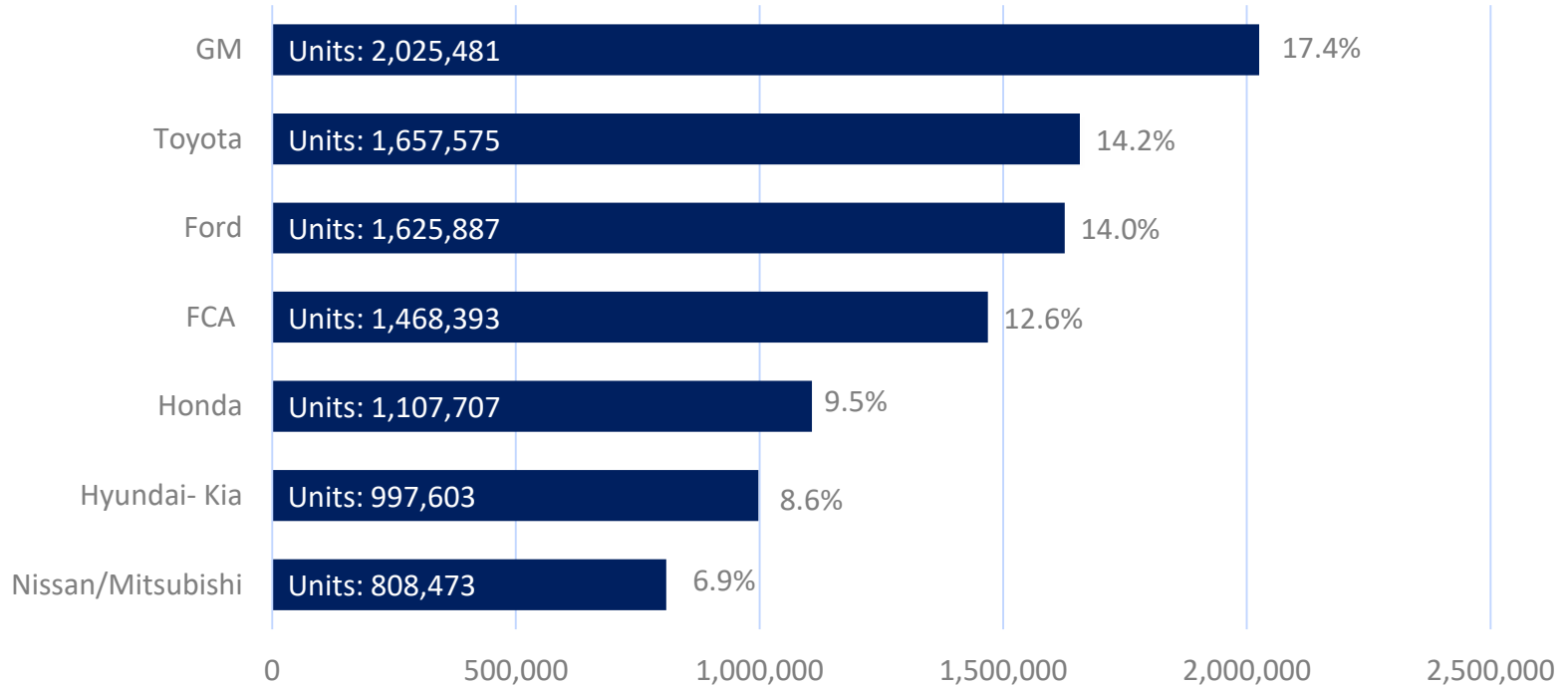
11,645,188 -2,389,814 100%	TOTAL LV Sales
997,603 -96,296 8.6%	Hyundai- Kia
2,025,481 -328,051 17.4%	GM
1,657,575 -310,514 14.2%	Toyota
1,625,887 -322,967 14.0%	Ford
1,107,707 -229,945 9.5%	Honda
1,468,393 -352,495 12.6%	FCA
808,473 -442,423 6.9%	Nissan/Mitsubishi

Percent Change in Sales of Light Vehicles Per OEM: YTD Through October: 2020 vs. 2019



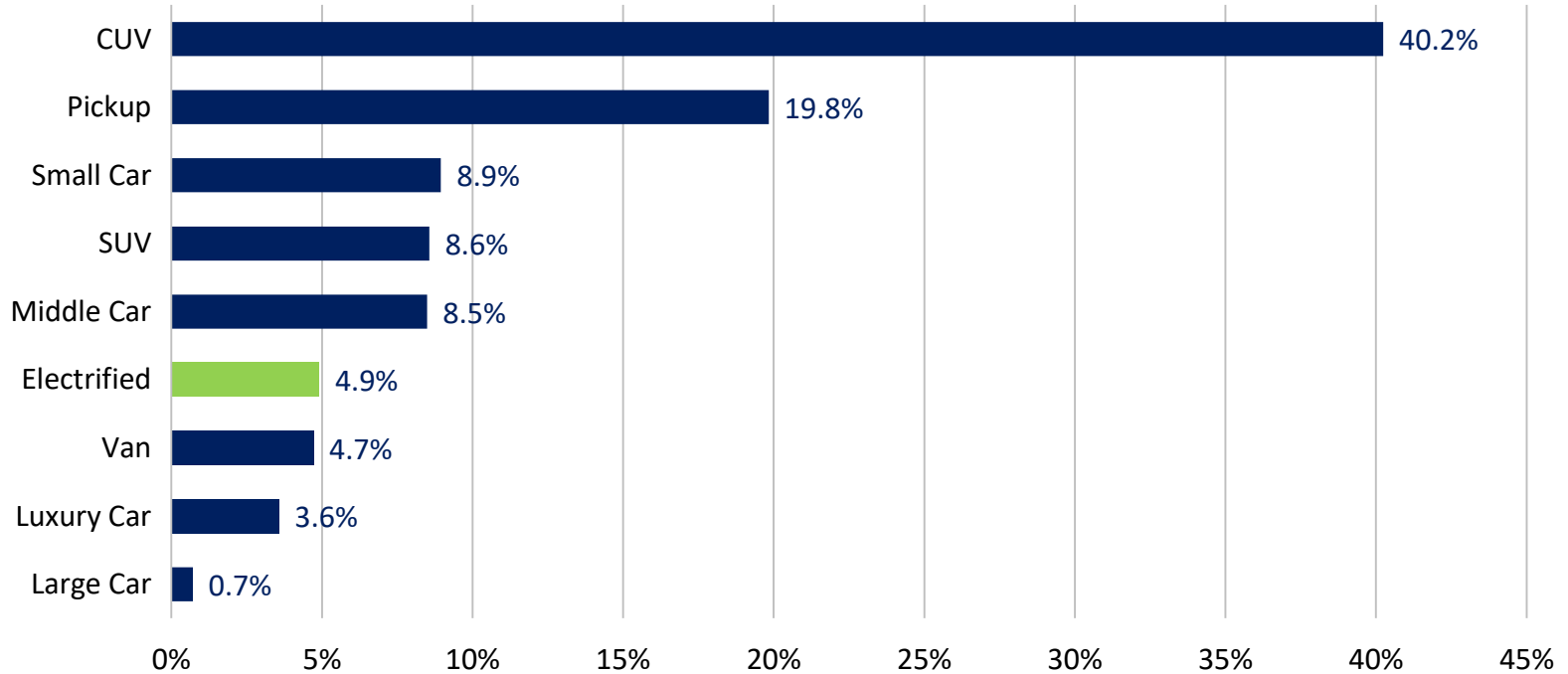
11,645,188	-2,389,814	100%	TOTAL LV Sales
226,016	-1,671	1.9%	Mazda
84,295	-1,944	0.7%	Volvo
259,610	-26,258	2.2%	Daimler
137,320	-20,743	1.2%	Tesla*
497,971	-82,889	4.3%	Subaru
446,822	-87,557	3.8%	Volkswagen**
226,581	-62,001	1.9%	BMW
75,454	-24,060	0.6%	JLR

U.S. Market Share: YTD October 2020



Market Share: Segment Breakdown

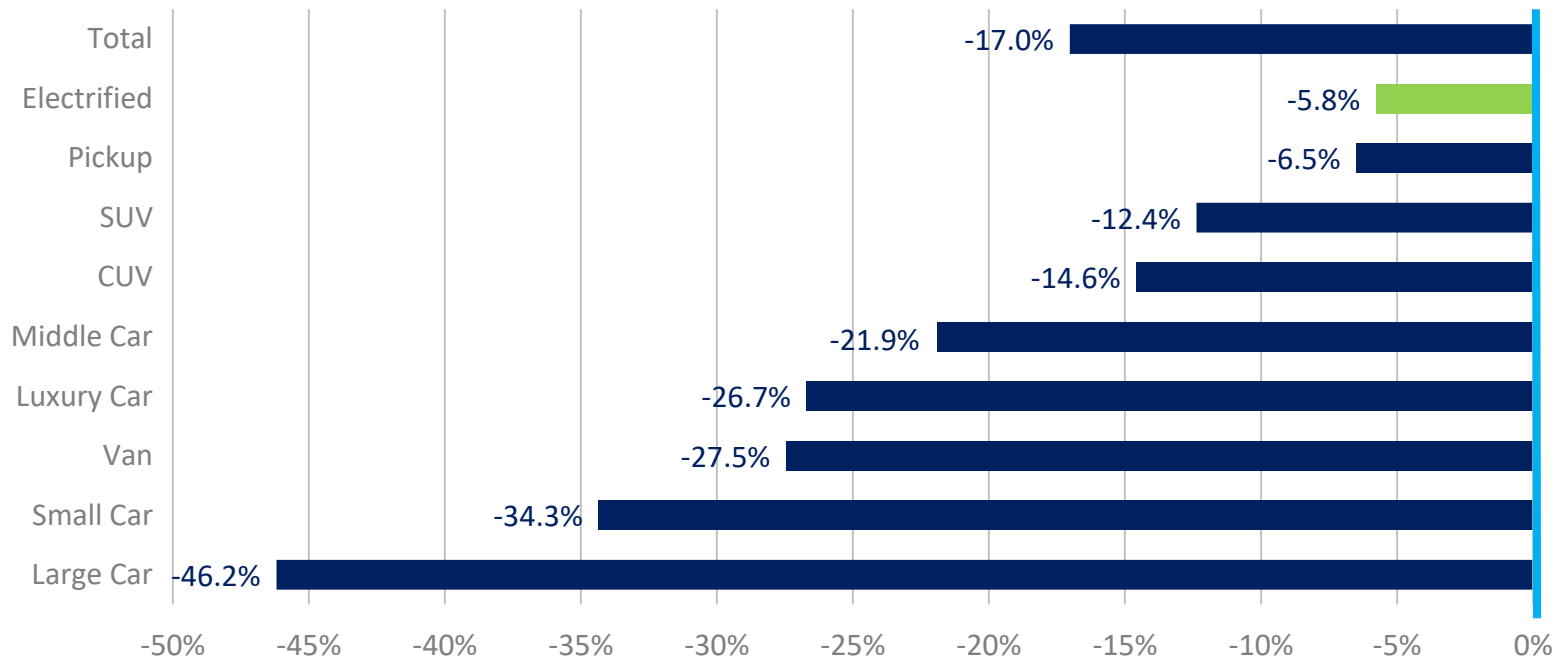
U.S. Light Vehicle Sales 2020 YTD Through October



Note: Electrified Segment consists of BEVs, HEVs and PHEVs; all other segments are sales exclusive of Hybrid models

Segment Breakdown: U.S. Light Vehicles Sales Percent Change

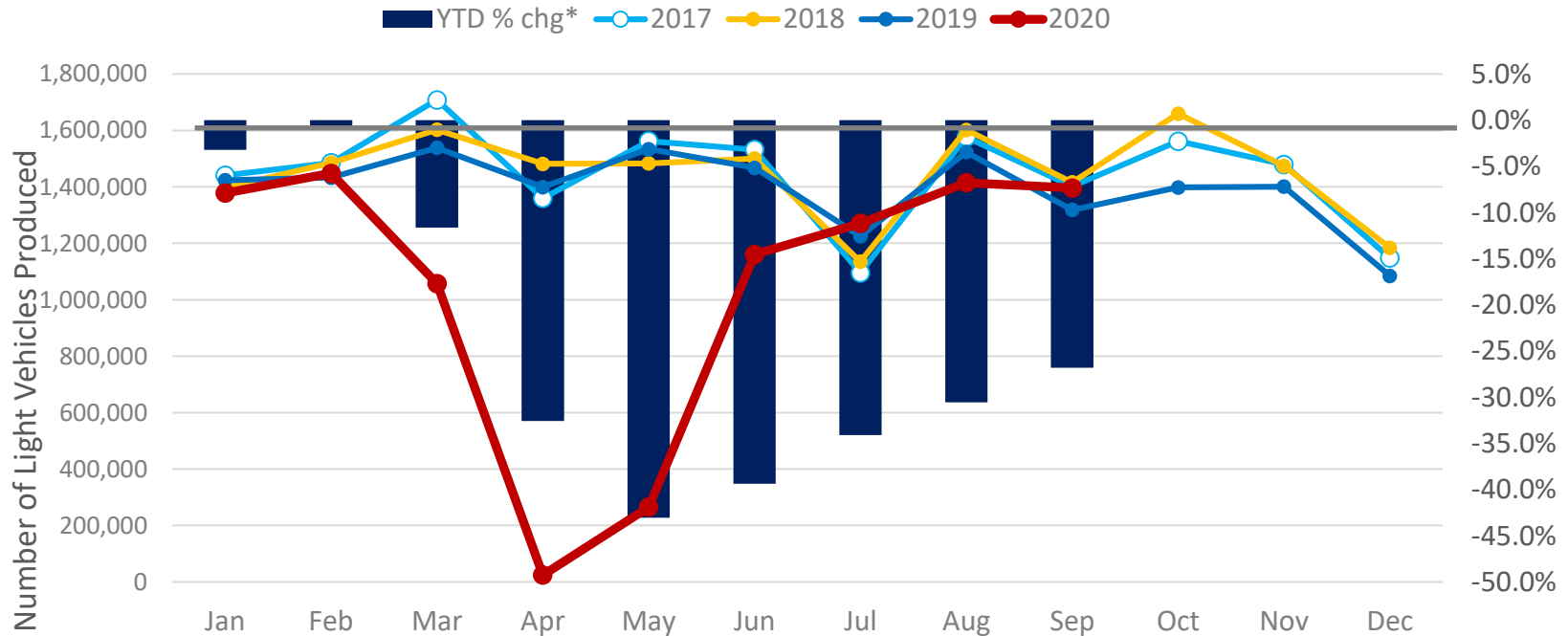
2020 YTD vs. 2019 YTD Through October



Note: Electrified Segment consists of BEVs, HEVs and PHEVs; all other segments are sales exclusive of Hybrid models

North America Monthly Production

2016 – 2020 YTD Through September

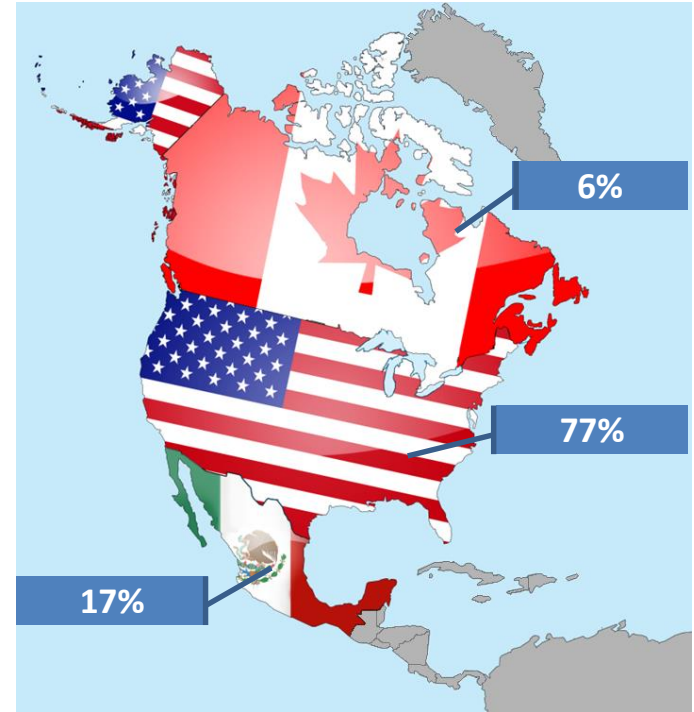


End of the Cycle: N.A. Announced Automaker Investment by Region 2009 to 2019

Region	Investment Amount (\$USD)
Canada	\$8.7B
United States	\$114.5B
<i>U.S. Great Lakes</i>	\$76.8B
<i>South</i>	\$23.8B
Mexico	\$24.7B
Total	\$147.9B

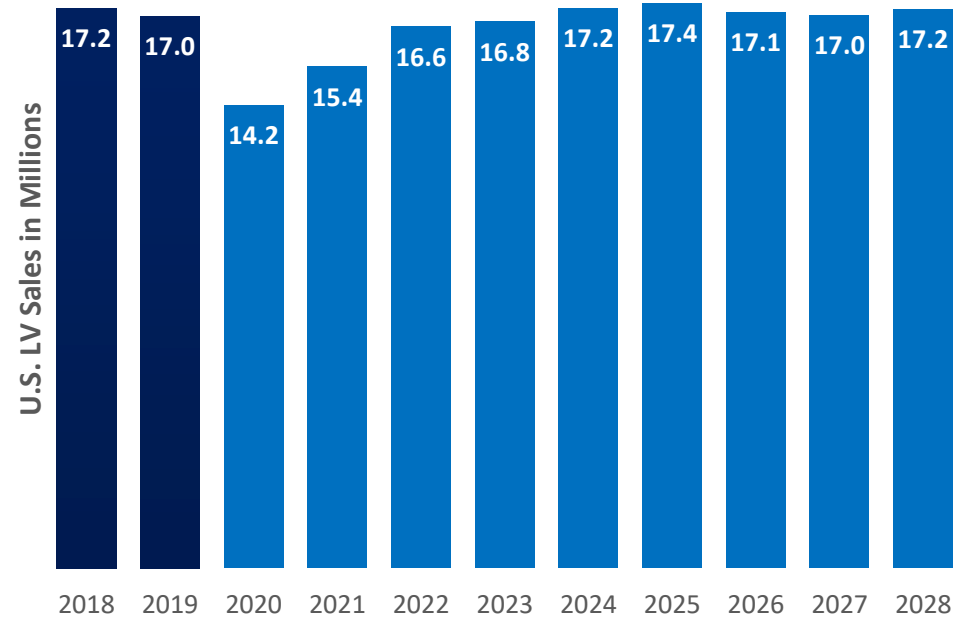
Note: U.S. Great Lakes includes: IL, IN, KY, MI, MO, and OH

South includes: AL, FL, GA, MS, SC, TN, and TX



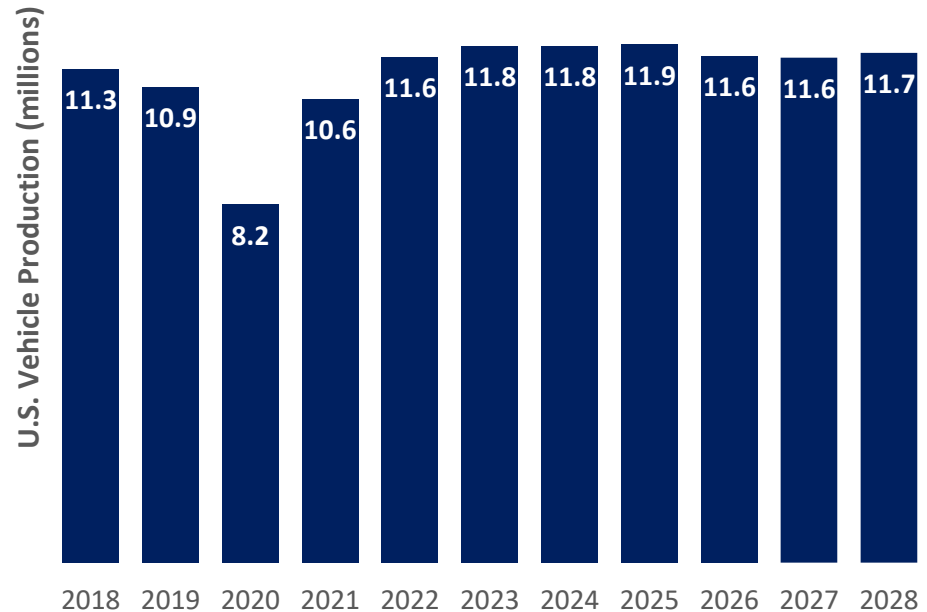
CAR's U.S. Light Vehicle Sales Forecast 2020-2028

U.S. Light Vehicle Sales



CAR's U.S. Motor Vehicle Production Forecast 2020-2028

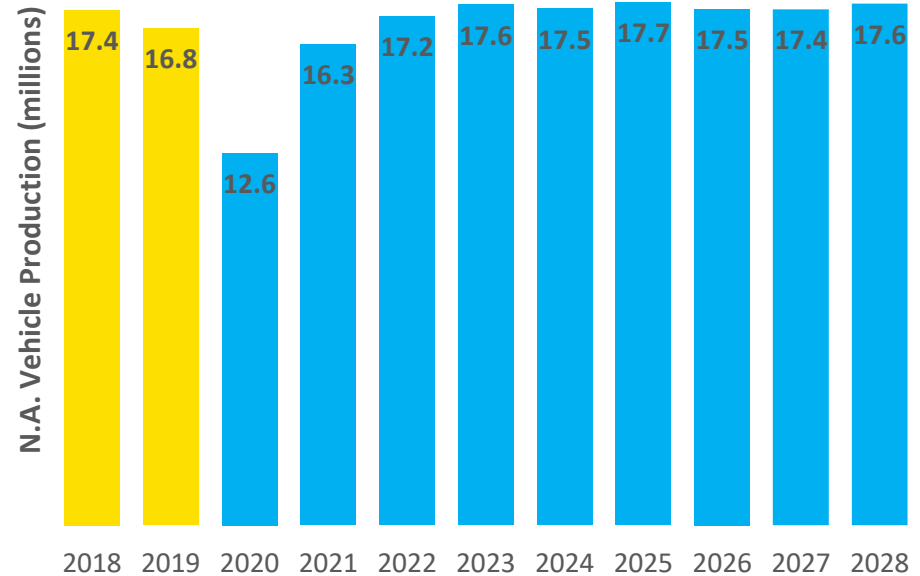
U.S. Motor Vehicle Production



**Include heavy-duty trucks*

CAR's North American Motor Vehicle Production Forecast 2020-2028

North American Motor Vehicle Production



**Include heavy-duty trucks*

THANK YOU

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