



Detroit
Regional
Partnership



**GLOBAL EPICENTER
OF MOBILITY**

REVOLUTIONIZING THE DETROIT REGION

**THE ROAD TO 2030
AUTOMOTIVE MODULE**

INTRODUCTION



AUTOMOTIVE MODULE KEY FINDINGS

+10% Growth

Forecast from 2025-2030

**In U.S. Light Vehicle
production**

+13.3% Growth

Forecast from 2024-2030

**In Detroit Region
automotive production –
outpacing the national
growth forecast**

22% Market Share

In the U.S. in 2025

**In electrified vehicles,
including hybrids and
Battery Electric Vehicles
(BEVs)**

\$11.7 Billion

from 2021-2025

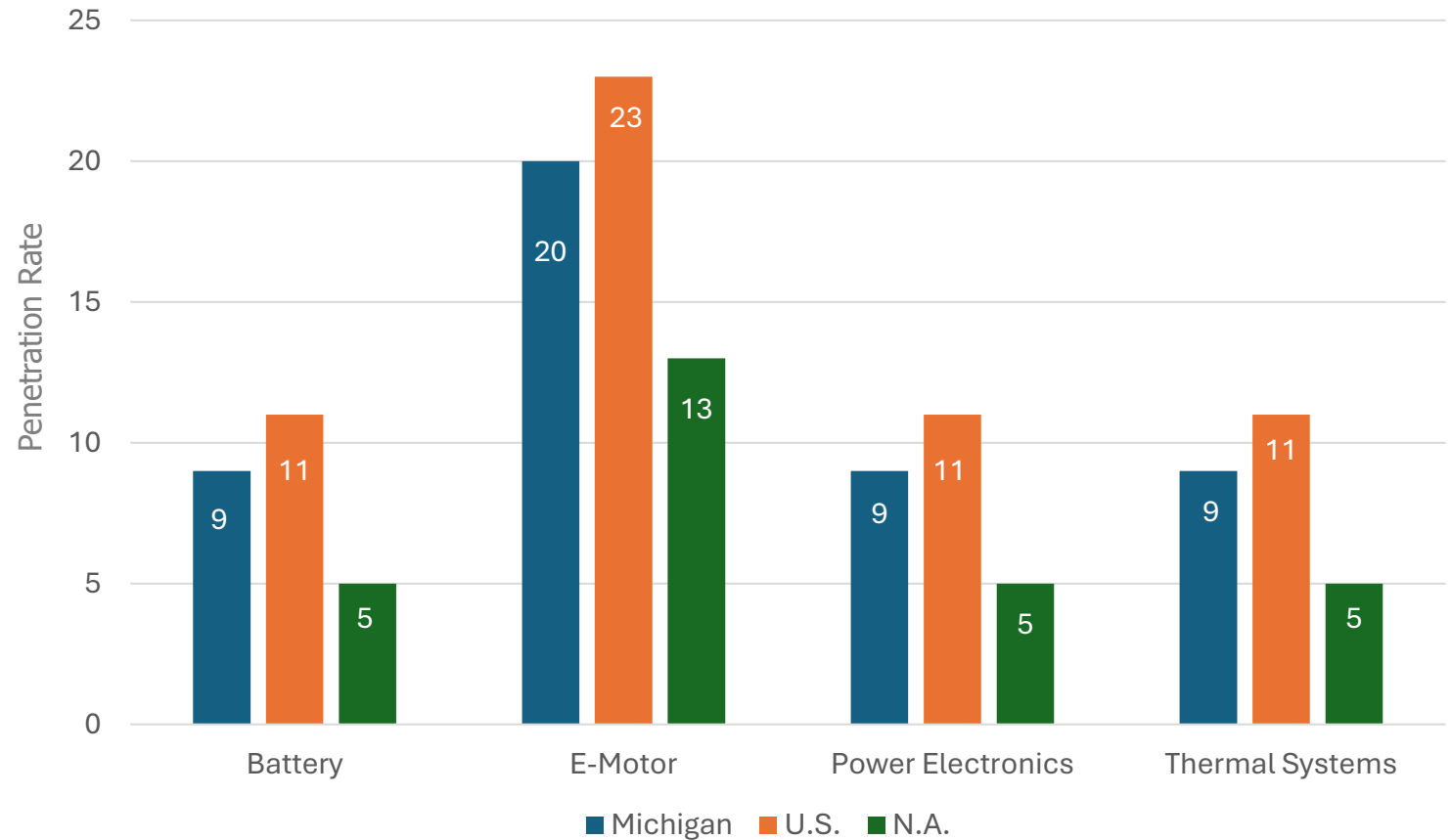
**Announced automotive
investment in the Detroit
Region**

DATA & FORECASTS

Light Vehicles are the mobility sector of greatest significance to Michigan and the Detroit Region.

Key emerging mobility technologies are forecast to see their initial high-volume applications in light vehicles. Electrical motors, for example, were equipped on 23.3% of vehicles produced in the U.S. in 2024.

2024 Automotive Penetration Rate

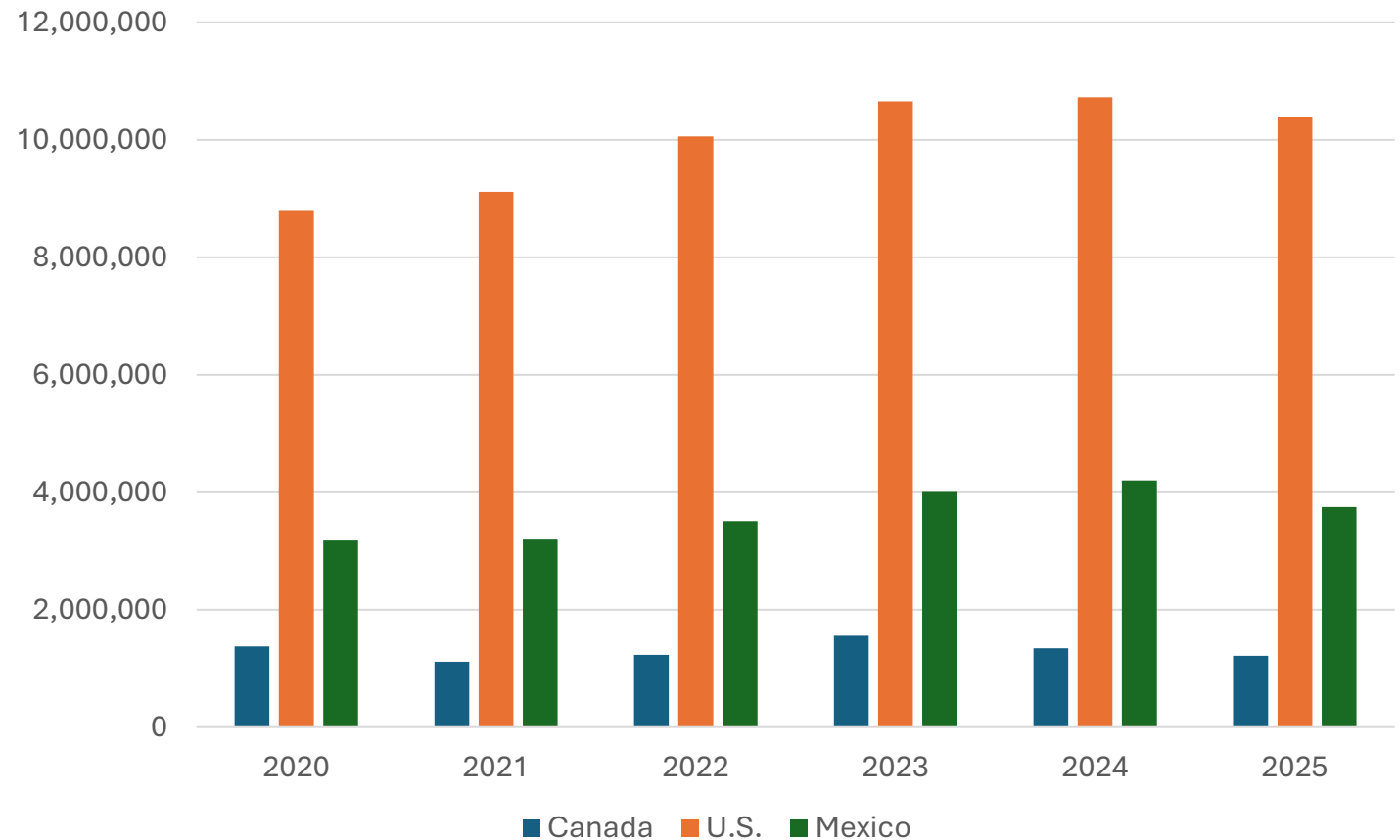


Source: DRP/GEM analysis of data from S&P Global Automotive

North American Light Vehicle production has increased gradually over the last five years and has returned to pre-pandemic levels.

U.S. Light Vehicle production reached 10.4 million units in 2025, accounting for 67.8% of the North American total – representing a slight increase over the 65.7% reached in 2020.

N.A. Light Vehicle Production

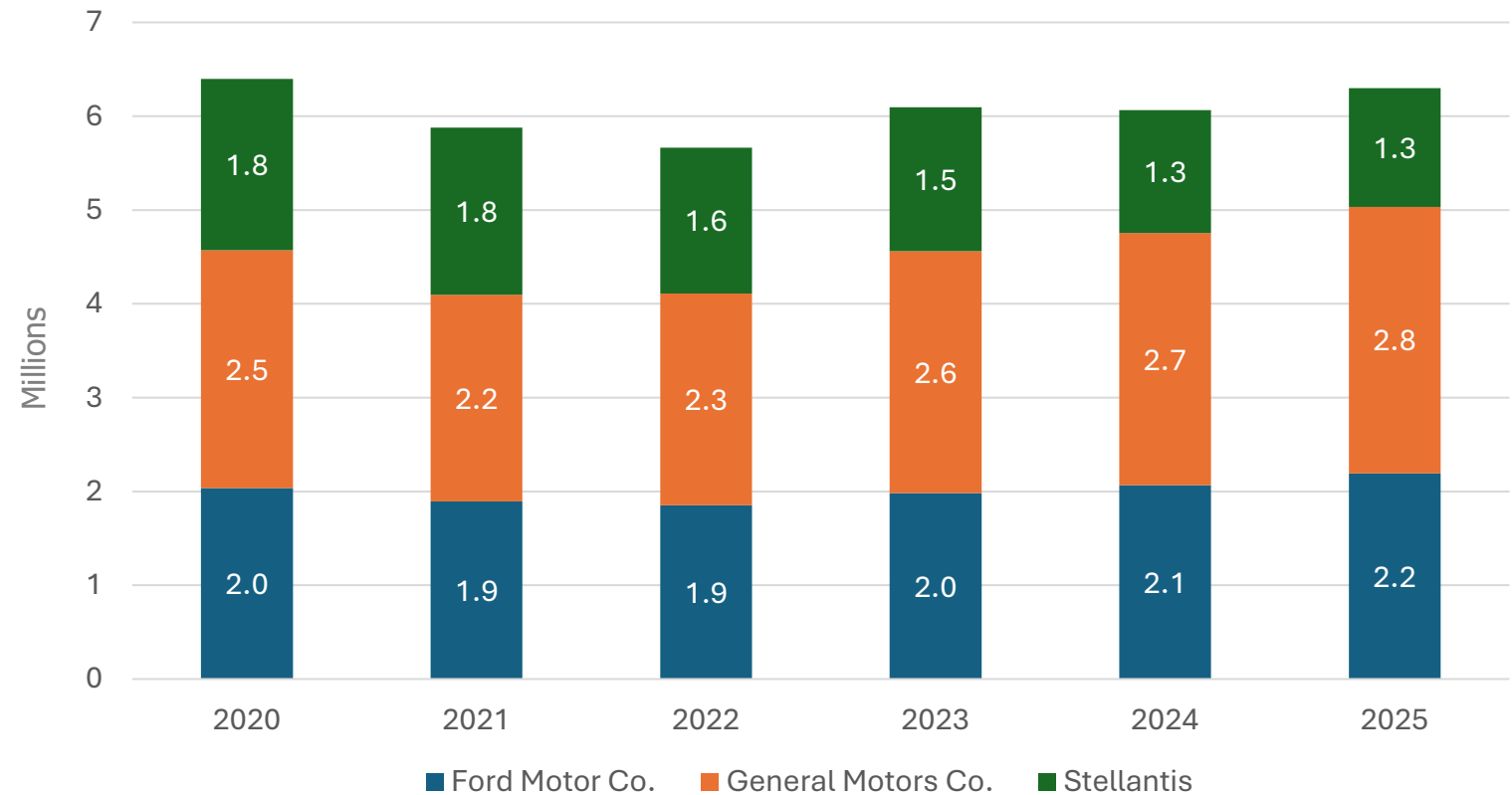


Source: Marklines Automotive Industry Portal

The Detroit Three automakers (Ford, General Motors, and Stellantis) are of critical importance to the Detroit Region.

While sales of Ford and General Motors vehicles were above 2020 levels in 2025, sales of Stellantis vehicles were lower by about 500,000 units.

Detroit Three U.S. Light Vehicle Sales

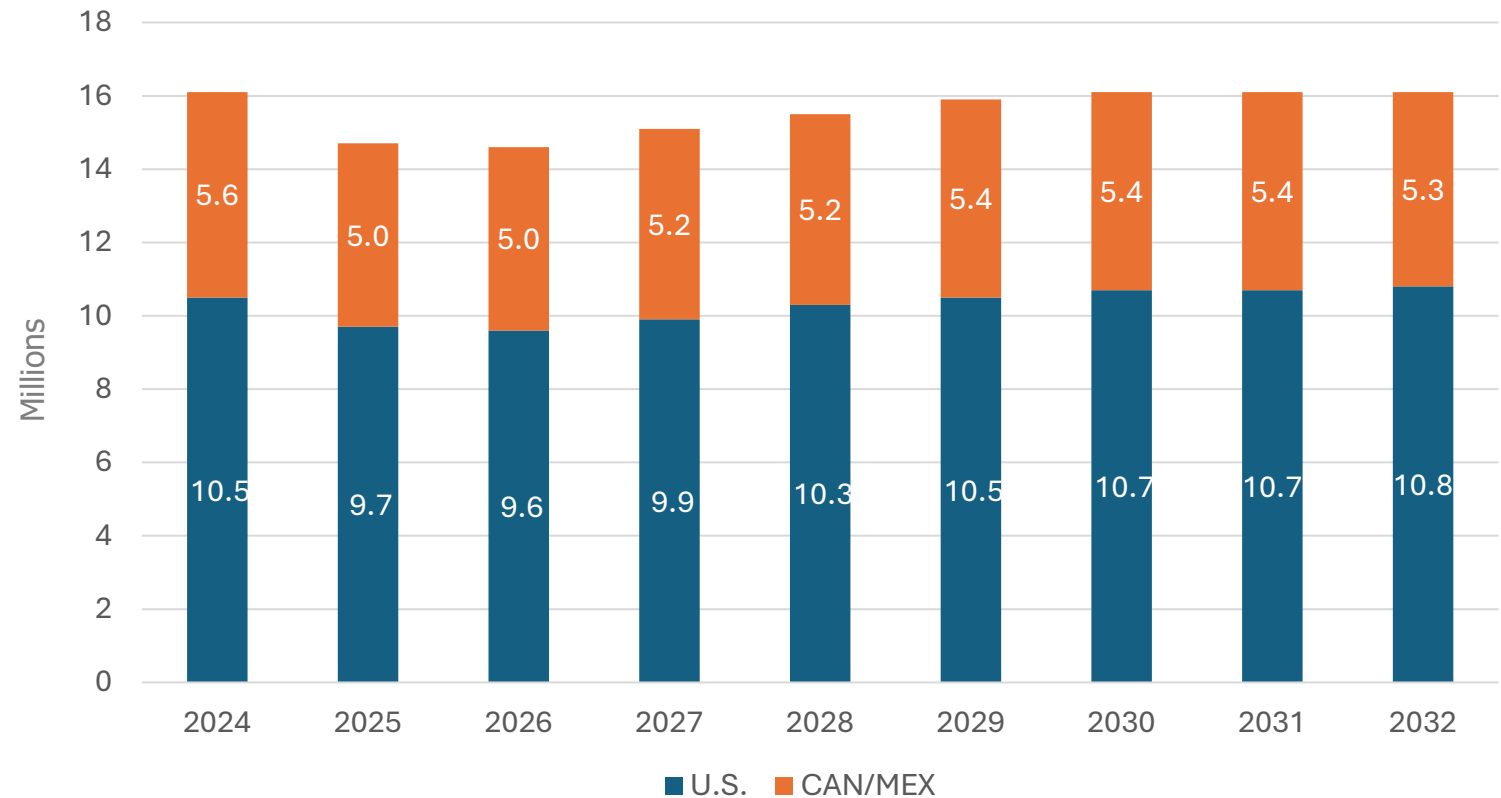


Source: Automotive News Research & Data Center

Total North American Light Vehicle production is expected to reach **a level of** about 16 million units in 2029 and maintain those levels through 2032.

U.S. Lightly Vehicle production is forecast to experience a significant increase over this time, increasing from 9.7 million units in 2025 to 10.8 million in 2032.

N.A. Production Forecast

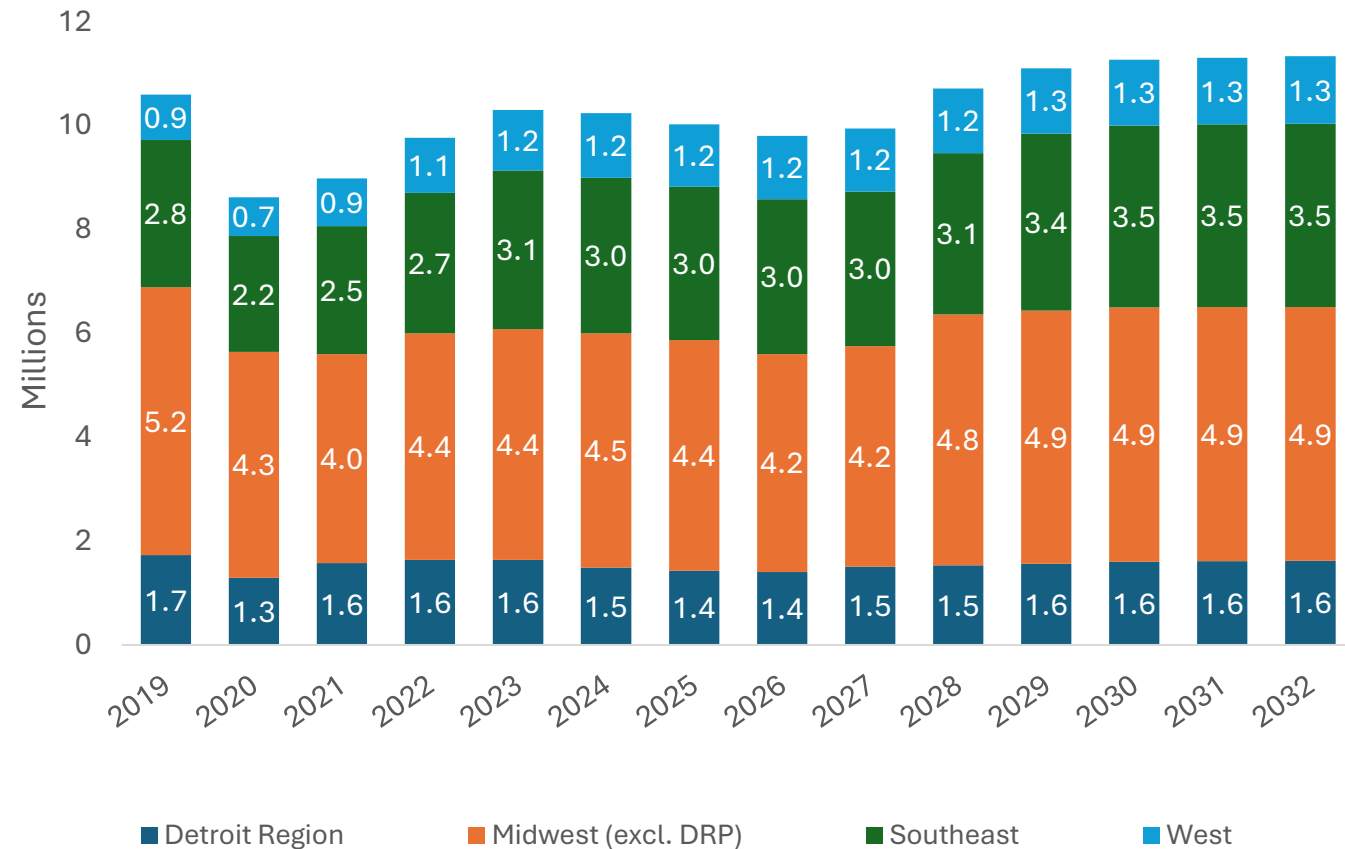


Source: CAR Dashboard, Q4 2025

U.S. Production by Region

In 2025, automakers produced about 1.4 million vehicles in the Detroit Region, accounting for about 14.3% of US light vehicle production.

The region is expected to maintain this share of the national total through 2032, when Detroit Region production volumes are forecast to reach 1.6 million units.

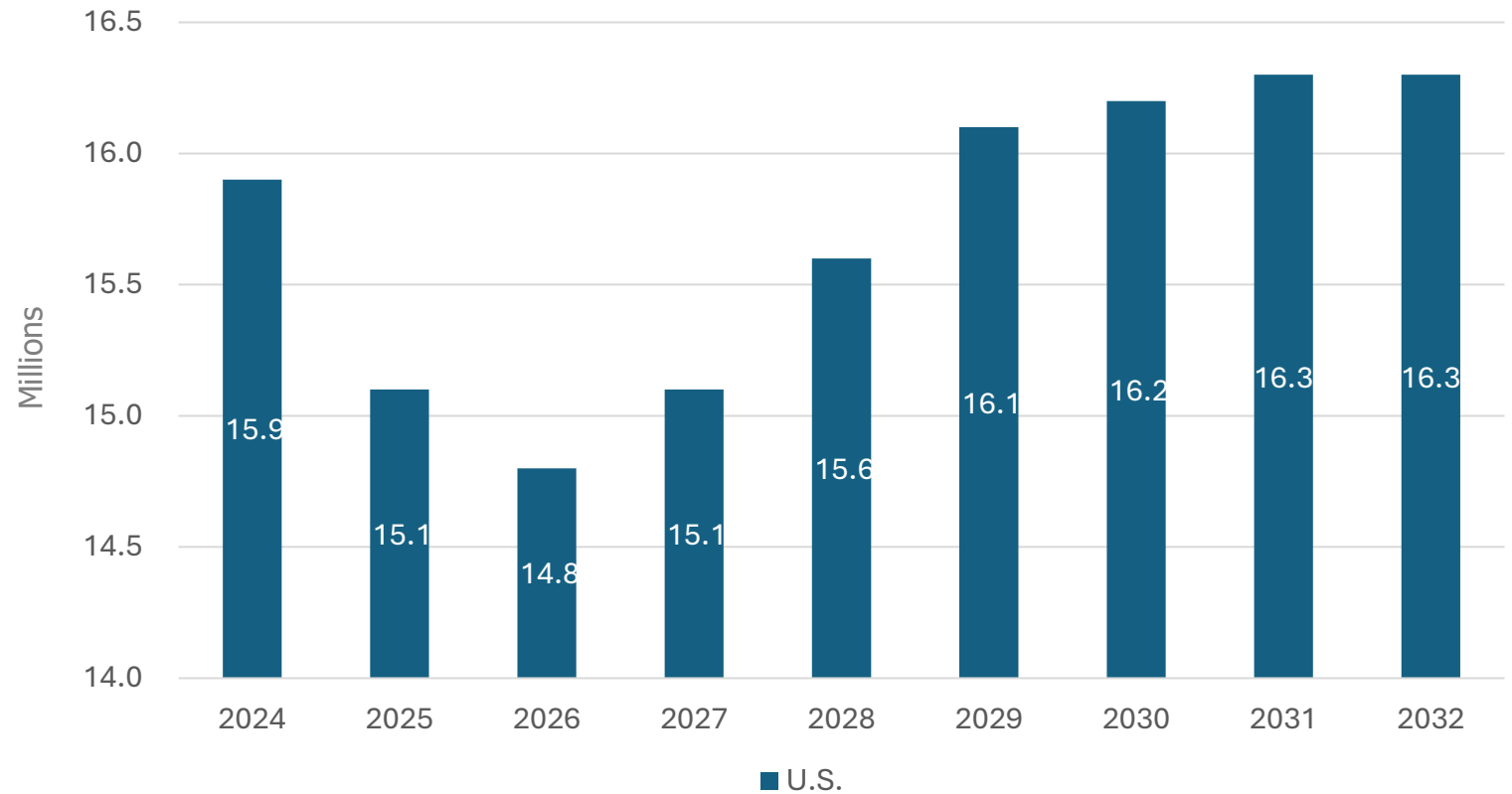


Source: AutoForecast Solutions

U.S. Automotive Sales Forecast

U.S. light vehicle sales are forecast to increase from a level of 14.8 million units in 2026 to 16.3 million units in 2032.

This forecast represents a 7.5% growth over this time and a return to levels near historical highs.

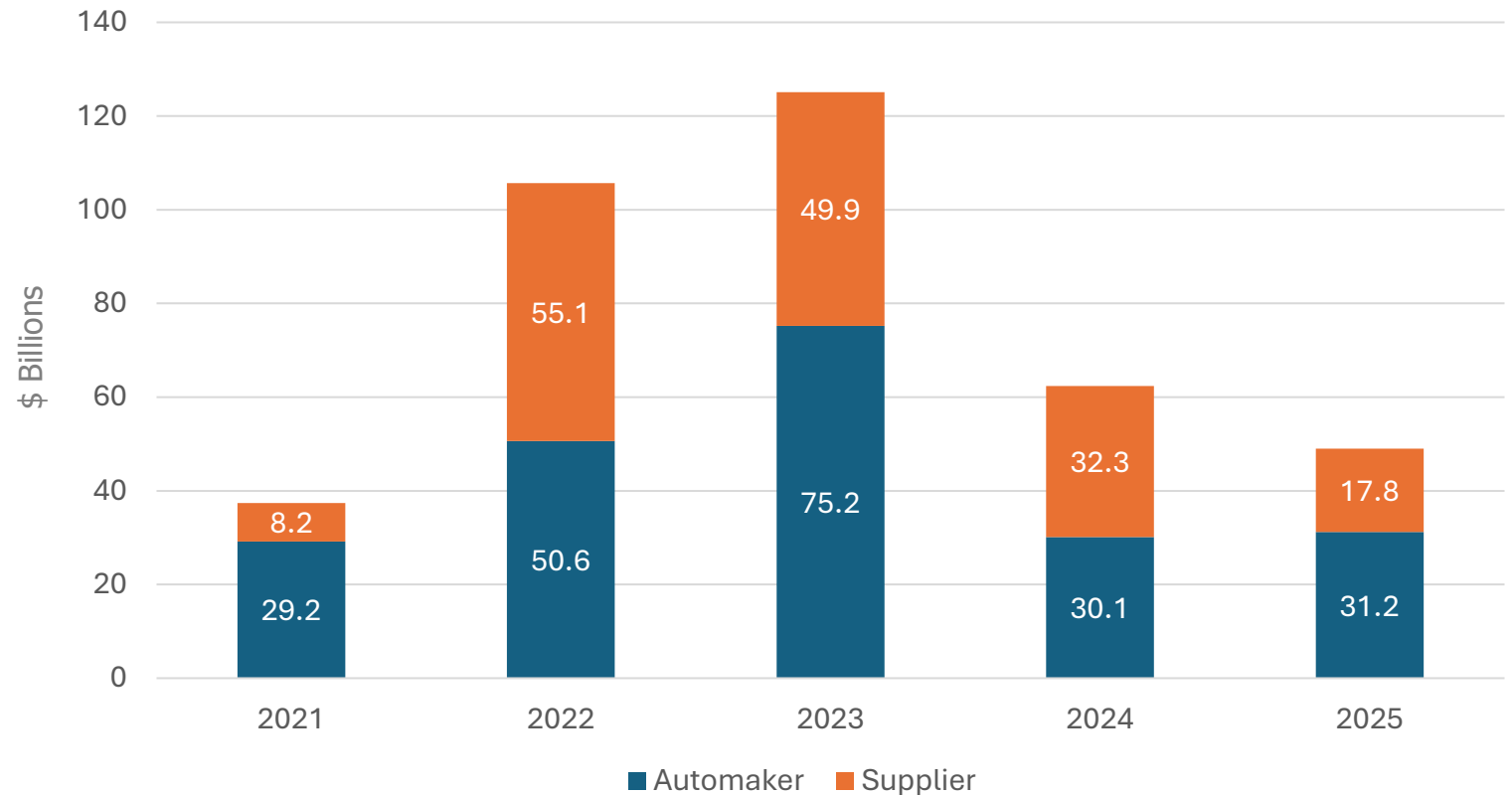


Source: CAR Dashboard, Q4 2025

N.A. Automotive Investment

North American automaker and supplier investment reached a level over \$125 billion in 2023 as the industry continued its post pandemic recovery.

In 2025, \$49 billion of investments were announced, with the majority or \$31.2 billion, coming from automakers and an additional \$17.8 billion from suppliers

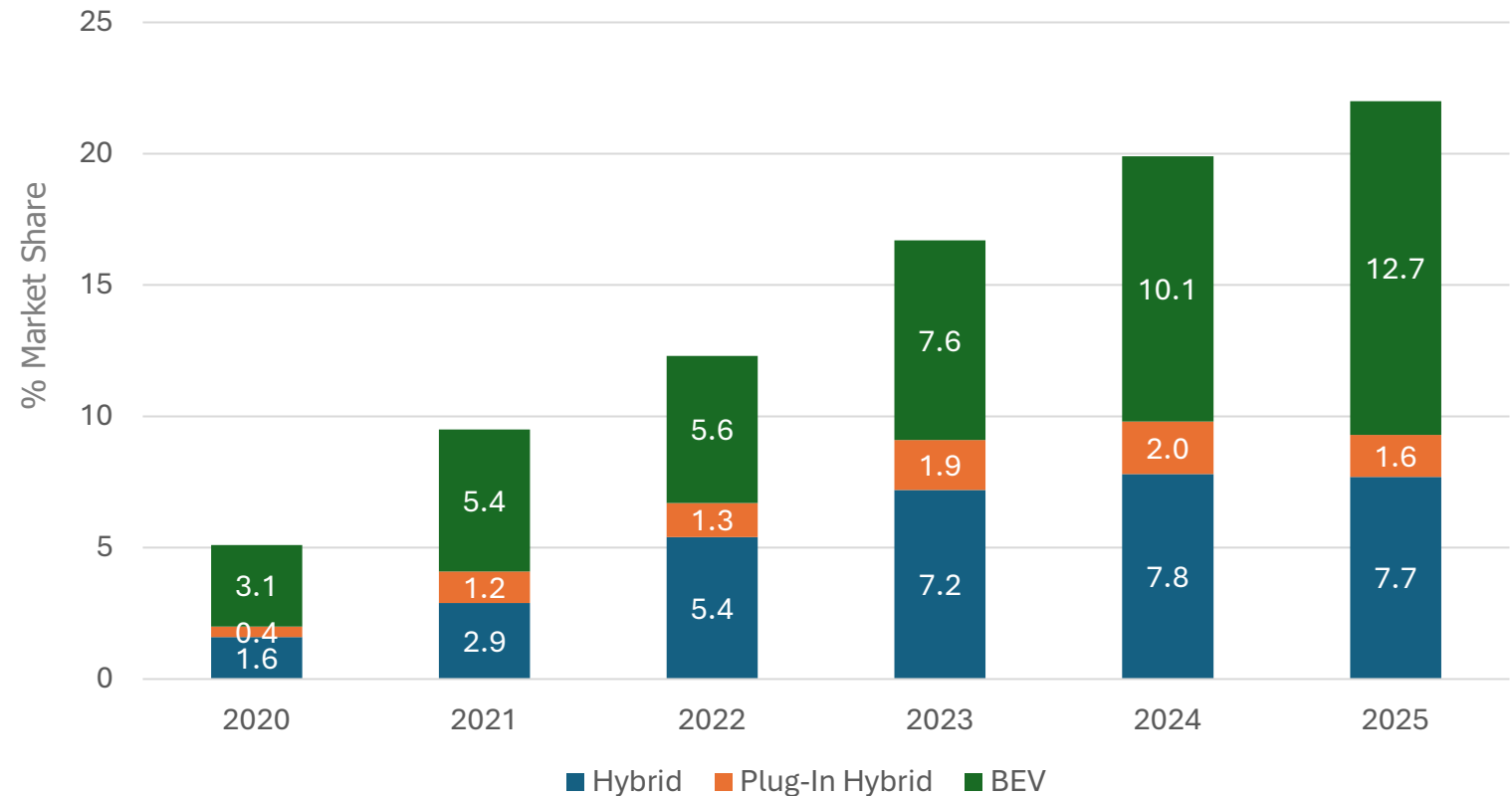


Source: CAR Book of Deals

In 2025, electrified vehicles of all types accounted for 22% of the U.S. light vehicle market.

Sales of conventional hybrid vehicles reached an all-time high of 12.7% in 2025. Sales of pure Battery Electric Vehicles (BEVs), however, fell slightly from 7.8 million units in 2024 to 7.7 million units in 2025.

U.S. Electrified LV Share by Type

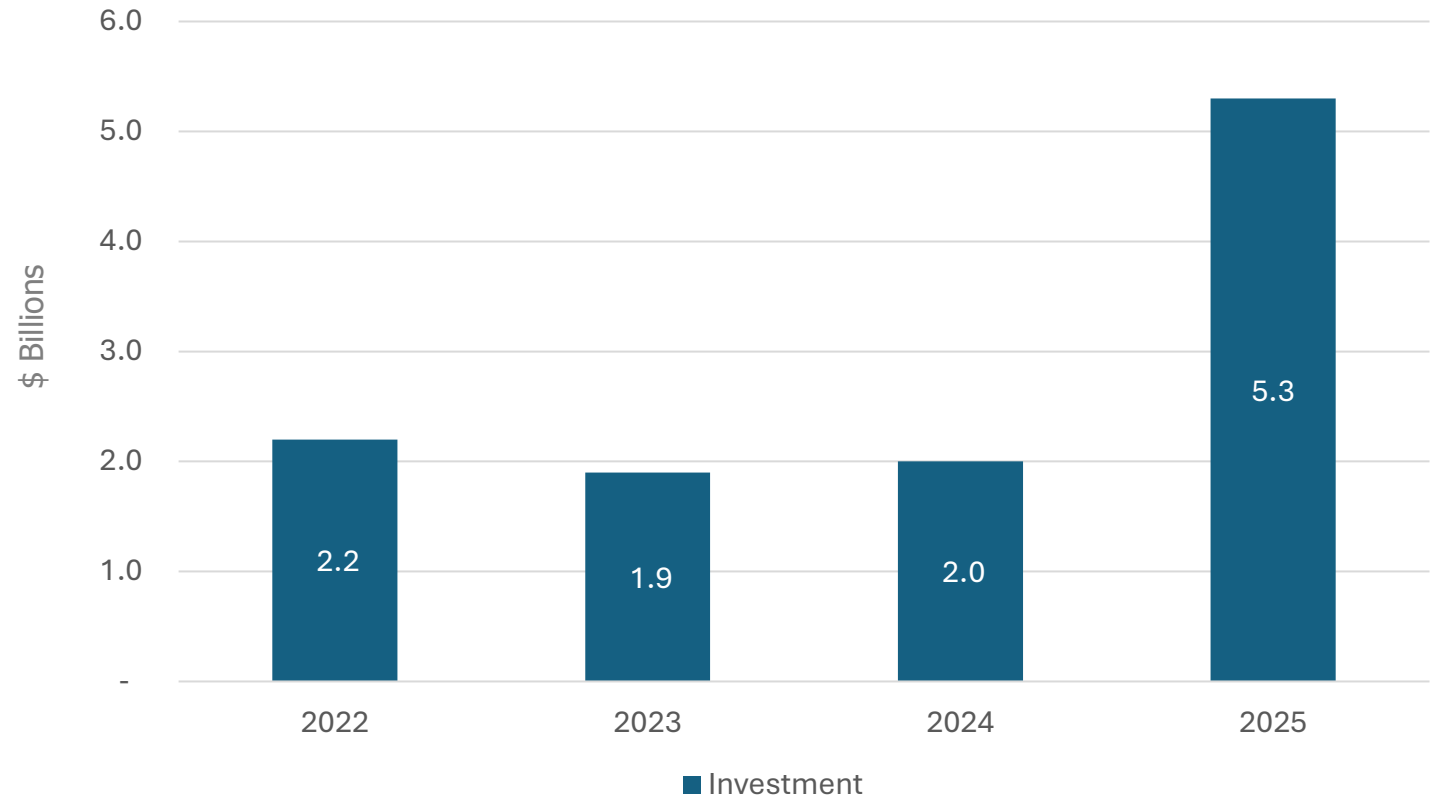


Source: Automotive News Research & Data Center

Detroit Region automotive investment reached \$5.3 billion in 2025, representing a significant increase over the levels achieved in recent years.

These totals include investments from both automakers and suppliers involved in the automotive mobility sector.

Detroit Region Automotive Investment*



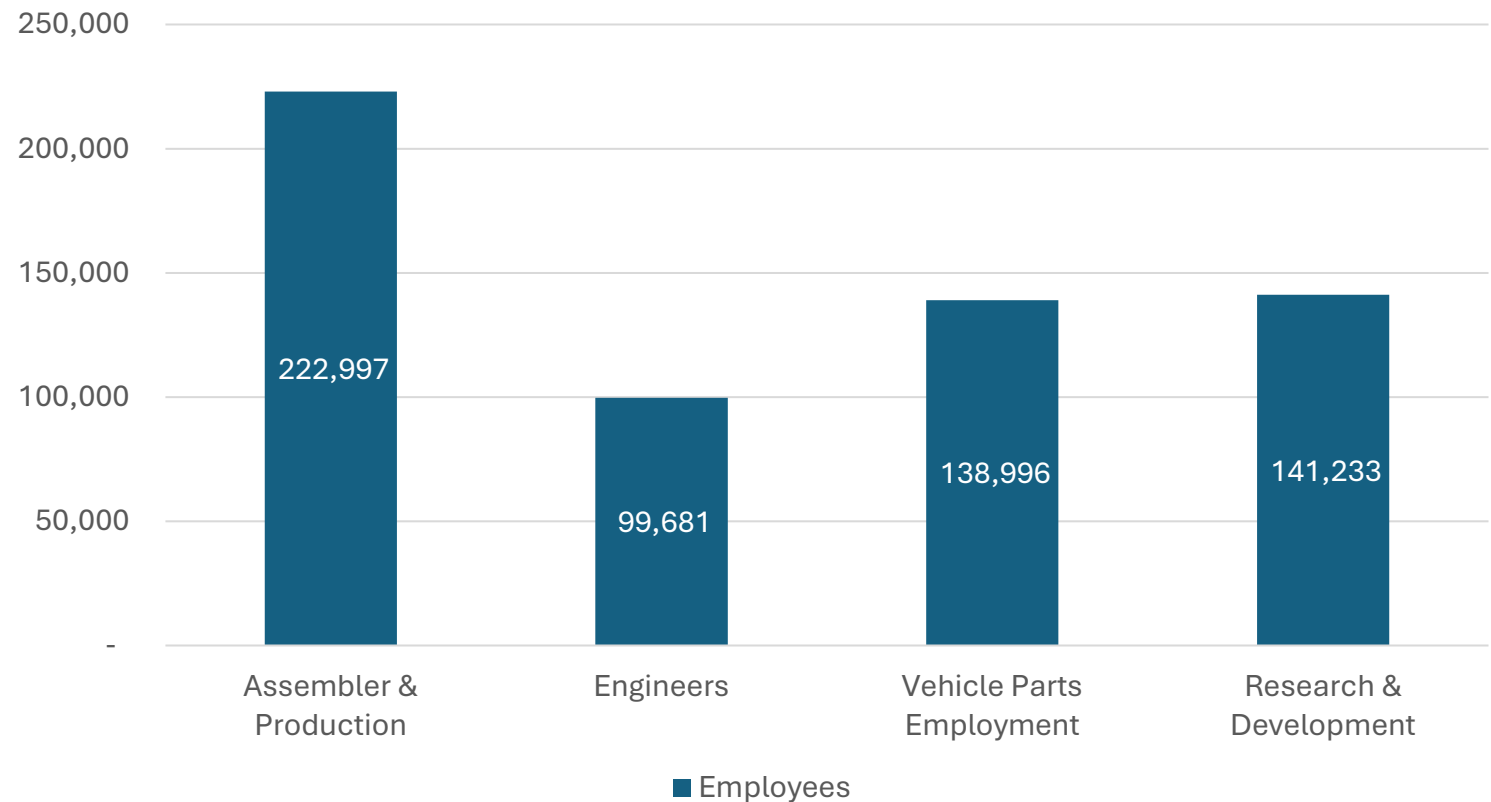
Source: DRP Automotive Industry Cluster Dashboard

*The \$5.3 Billion announced in 2025 includes a \$4 Billion investment from General Motors which is spread out among multiple facilities in several states. The number will be updated once the Detroit Region portion is announced.

The automotive sector plays a dominant role in the economy of the Detroit region.

The sectors' massive regional employment contribution can be broken out in myriad ways. Assembler and production employment, for example, reached nearly 223,000 in 2024. Importantly, employment in the critical Research and Development category topped 141,000 for the same year.

2024 Detroit Region Automotive-Related Employment



Source: DRP Automotive Industry Cluster Dashboard

Astemo Americas

- Regional Headquarters
 - \$95 Million
 - Focused on Software-Defined Vehicle (SDV) development
 - Creation of over 200 new jobs
 - Includes testing and proving facilities



Source: Astemo Americas

Stellantis NV Megahub

- Detroit Assembly Complex – Jefferson
 - \$130 Million
 - Retooling for new generation of Dodge Durango
- Van Buren Township
 - \$388 Million Investment
 - New vehicle component logistics hub



Source: Stellantis NV

This summary presentation will be updated as additional analysis continues.
New and updated federal policy changes will be monitored and updates applied as needed.