

# DRIVING THE FUTURE



THE EMPLOYMENT AND ECONOMIC IMPACT OF THE VEHICLE  
SUPPLIER INDUSTRY IN THE U.S.



[mema.org](http://mema.org)



# THE LARGEST SECTOR OF MANUFACTURING JOBS IN THE UNITED STATES JUST GOT BIGGER

The **Motor & Equipment Manufacturers Association (MEMA)** and its four specialized divisions comprise the leading international trade association in the fast-changing Mobility Industry.

Representing vehicle suppliers that manufacture and remanufacture components, technologies, and systems for use in passenger cars and heavy trucks, MEMA's members drive innovation in the Mobility Industry by combining high-tech capabilities in new vehicles –such as autonomous vehicles and vehicle connectivity–and the “nuts and bolts” of vehicle manufacturing.



**2.9%**  
OF JOBS

**VEHICLE PARTS MANUFACTURING REPRESENTS IN THE TOTAL U.S. EMPLOYMENT MARKET**

[UP 0.2 SHARE POINTS FROM 2012]



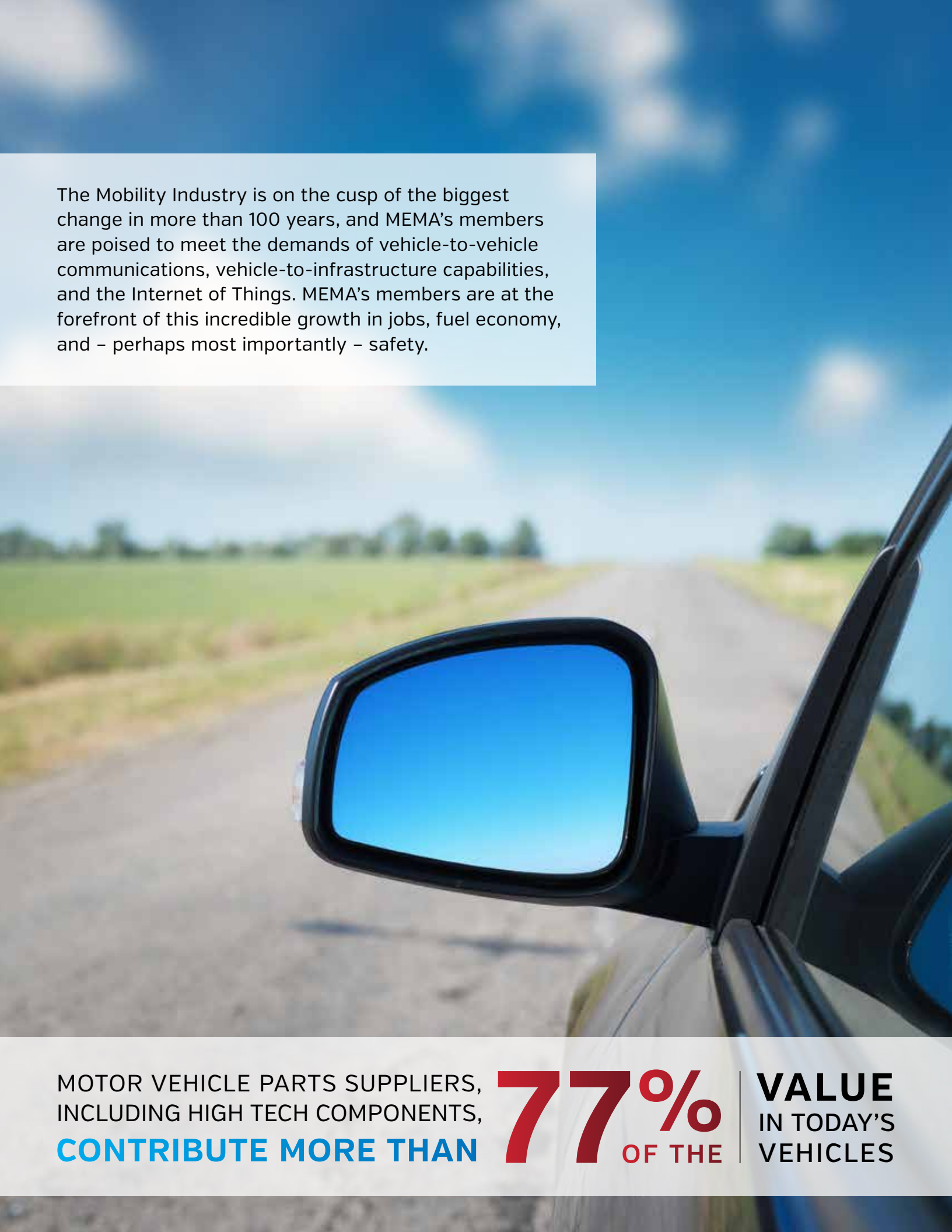
**871,000**  
AMERICANS  
EMPLOYED  
IN 2015



**734,000**  
AMERICANS  
EMPLOYED  
IN 2012

**MOTOR VEHICLE PARTS MANUFACTURING JOBS GREW NEARLY**

**19%** SINCE 2012



The Mobility Industry is on the cusp of the biggest change in more than 100 years, and MEMA's members are poised to meet the demands of vehicle-to-vehicle communications, vehicle-to-infrastructure capabilities, and the Internet of Things. MEMA's members are at the forefront of this incredible growth in jobs, fuel economy, and - perhaps most importantly - safety.

MOTOR VEHICLE PARTS SUPPLIERS,  
INCLUDING HIGH TECH COMPONENTS,  
**CONTRIBUTE MORE THAN**

**77%**  
OF THE

**VALUE**  
IN TODAY'S  
VEHICLES

# NUMBERS TELL THE **MEMA** STORY

**2.4%** OF THE U.S.

GDP GENERATED BY THE  
**MOTOR VEHICLE PARTS**  
MANUFACTURING INDUSTRY



**\$270 BILLION**

Total employee compensation paid to workers supported by the motor vehicle parts manufacturing industry in 2015– a rise of 22% from \$221 billion in 2012 is 2.8% of total U.S. employee compensation

[up 0.2 share points from 2012]



**\$435 BILLION**

Economic contribution to the U.S. GDP generated by the motor vehicle parts manufacturing industry and its supported activity in 2015 – 2.4% of U.S. GDP

[up 0.2 share points from 2012]



**47 PERCENT**

The percent of total direct employment in the top five states—MI, OH, IN, TN, KY





**4.26 MILLION**

Total employment impact of the motor vehicle parts manufacturing industry in the U.S. – rising nearly 18% from 3.62 million in 2012



**1.9 MILLION**

Additional employment-induced jobs within the U.S.



**1.49 MILLION**

Indirect jobs generated by supply chain effect of direct jobs

**MEMA'S MEMBER COMPANIES ARE THE LARGEST SECTOR OF MANUFACTURING JOBS IN THE U.S.**

MEMA'S MEMBERS ARE REPRESENTED THROUGH FOUR DIVISIONS, EACH WITH ITS OWN DISTINCT MARKET SEGMENT

# WE ARE MEMA, THE MOBILITY INDUSTRY ASSOCIATION

**SUPPLIERS ARE A DRIVING FORCE IN THE MOTOR VEHICLE INDUSTRY.**

Through its four specialized divisions, MEMA's members are transforming mobility through innovation and technology while generating environmental improvements through sustainability. We are focused on vehicle safety and making a strong contribution to the U.S. economy.



## THE AUTOMOTIVE AFTERMARKET SUPPLIERS ASSOCIATION

Sector: **Automotive; Light-Duty**

Market: **Aftermarket**

Whether it is for “do-it-yourselfers,” independent repair professionals, or a vehicle manufacturer’s dealership service facility, the automotive light vehicle aftermarket supplies vehicle parts, chemicals, tools, equipment, and accessories that help maintain more than 260 million light vehicles in operation in the U.S. The Automotive Aftermarket Suppliers Association represents hundreds of companies that provide the parts and technologies needed to repair and maintain these vehicles every day. AASA is a recognized industry change agent – promoting a collaborative industry environment, providing a forum to address issues, and serving as a valued resource for members.

As the average age of motor vehicles on U.S. roads nears 12 years, parts manufacturers play a vital role in ensuring the availability of repair and maintenance parts to ensure the safety of motorists. Serving the needs of the aftermarket has led to consistent growth in jobs related to the sector.

**140,000**

DIRECT U.S. JOBS IN **2012**

**145,000**

DIRECT U.S. JOBS IN **2015**

**3.6%**

INCREASE



## THE HEAVY DUTY MANUFACTURERS ASSOCIATION

Sector: **Commercial Vehicle; Heavy-Duty; Off-Highway**  
Market: **Original Equipment; Aftermarket**

The vast majority of goods in the United States are transported on the nation's highways by commercial vehicles like medium- and heavy-duty vehicles. In addition, the nation relies on school and transit buses, emergency vehicles, and agricultural and other off-road vehicles to support our economy, maintain our infrastructure, and increase our quality of life.

The Heavy Duty Manufacturers Association represents the manufacturers of original equipment and aftermarket parts and technologies that help create new commercial and maintain in-service vehicles that are safe and energy efficient.

**171,000** ..... **203,000** ..... **18.7%**  
DIRECT U.S. JOBS IN **2012**      DIRECT U.S. JOBS IN **2015**      **INCREASE**



# THE MOTOR & EQUIPMENT REMANUFACTURERS ASSOCIATION

Sector: **Automotive; Light-Duty; Commercial Vehicle;  
Heavy-Duty; Off-Highway; Other**

Market: **Aftermarket**

The U.S. is the world's largest producer, consumer, and exporter of remanufactured goods, and the Motor & Equipment Remanufacturers Association represents 125 companies in the remanufacturing sector. U.S. production of remanufactured goods [in all sectors] totaled at least \$43.0 billion in 2011. U.S. remanufacturing activities supported at least 180,000 full-time jobs in the U.S. MERA represents motor vehicle parts remanufacturers as well as remanufacturers in other industries.



The Federal Vehicle Repair Cost Savings Act of 2015 prioritizes the use of remanufactured parts when servicing the federal civilian vehicle fleet. In 2016, MERA announced its Manufactured Again Certification program, which is tied to ISO 9001 and IATF 16949, two internationally recognized quality standards. ISO 9001 can be used by any organization, large or small, regardless of its field of activity. IATF 16949—a sector specific requirement that is a supplement to ISO 9001—is one of the automotive industry's most widely used international standards for quality management. With the program, companies can now certify that their remanufacturing processes meet quality management standards more generally associated with new manufacturing. This certification also allows all buyers to confidently identify—and purchase—remanufactured products.

## REMANUFACTURED GOODS EMPLOYMENT [2011]

### SECTORS RANKED BY GDP

1. Aerospace
2. HDOR Equipment
3. Motor Vehicle Parts (automotive)
4. Machinery
5. IT Products
6. Medical Devices
7. Retreaded Tires
8. Consumer Products
9. All Other
10. Wholesalers

**TOTAL: 180,000**

\*Source: International Trade Commission, 2011





## THE ORIGINAL EQUIPMENT SUPPLIERS ASSOCIATION

Sector: **Automotive; Light-Duty**

Market: **Original Equipment**

With more than two-thirds of a car's value generated by suppliers, the Original Equipment Suppliers Association is driving advances in technology in the Mobility Industry. OESA members directly impact the industry's emerging consumer lifestyle technologies and develop systems that can reduce traffic fatalities and improve safety on roads worldwide. OESA members work side-by-side with vehicle manufacturers to ensure that technologies that can save and improve lives are available to consumers in the 300 light vehicle models that are offered for sale in the U.S.

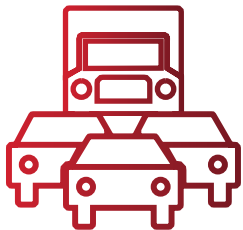
Given the size of the role they play in the motor vehicle industry, OE suppliers make up the majority of direct employment in the motor vehicle parts manufacturing industry. OESA has seen a 23.3 percent growth in employment since 2012, representing 523,000 direct jobs in the U.S.

..... **424,000** ..... **523,000** ..... **23.3%**  
DIRECT U.S. JOBS IN **2012**      DIRECT U.S. JOBS IN **2015**      **INCREASE**

# DRIVING ECONOMIC GROWTH BY COMBINING MANUFACTURING AND TECHNOLOGY

Manufacturing jobs in America are growing. Over the next decade, we anticipate that 3.5 million new jobs will be created in the general manufacturing sector.\* With new technologies transforming the Mobility Industry, many of those new jobs will be well-paid, high-tech jobs related to vehicle parts suppliers. In 2014, the average manufacturing worker in the U.S. earned nearly \$80,000 per year.

High-tech industries are a critical part of the U.S. economy, employing nearly 17 million workers in 2014. The high-tech sector, defined as industries having high concentrations of workers in STEM [Science, Technology, Engineering, and Mathematics] occupations, has begun to take an ever-larger role as parts suppliers and the motor vehicle manufacturing industry make revolutionary new technical advances. There is no doubt that innovators in traditional STEM occupations are crossing over into the fast-changing world of motor vehicle manufacturing.



**MOBILITY**

+



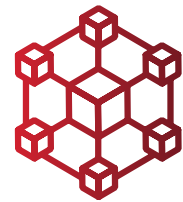
**NEW  
TECHNOLOGIES**

+



**NEW SERVICES**

=



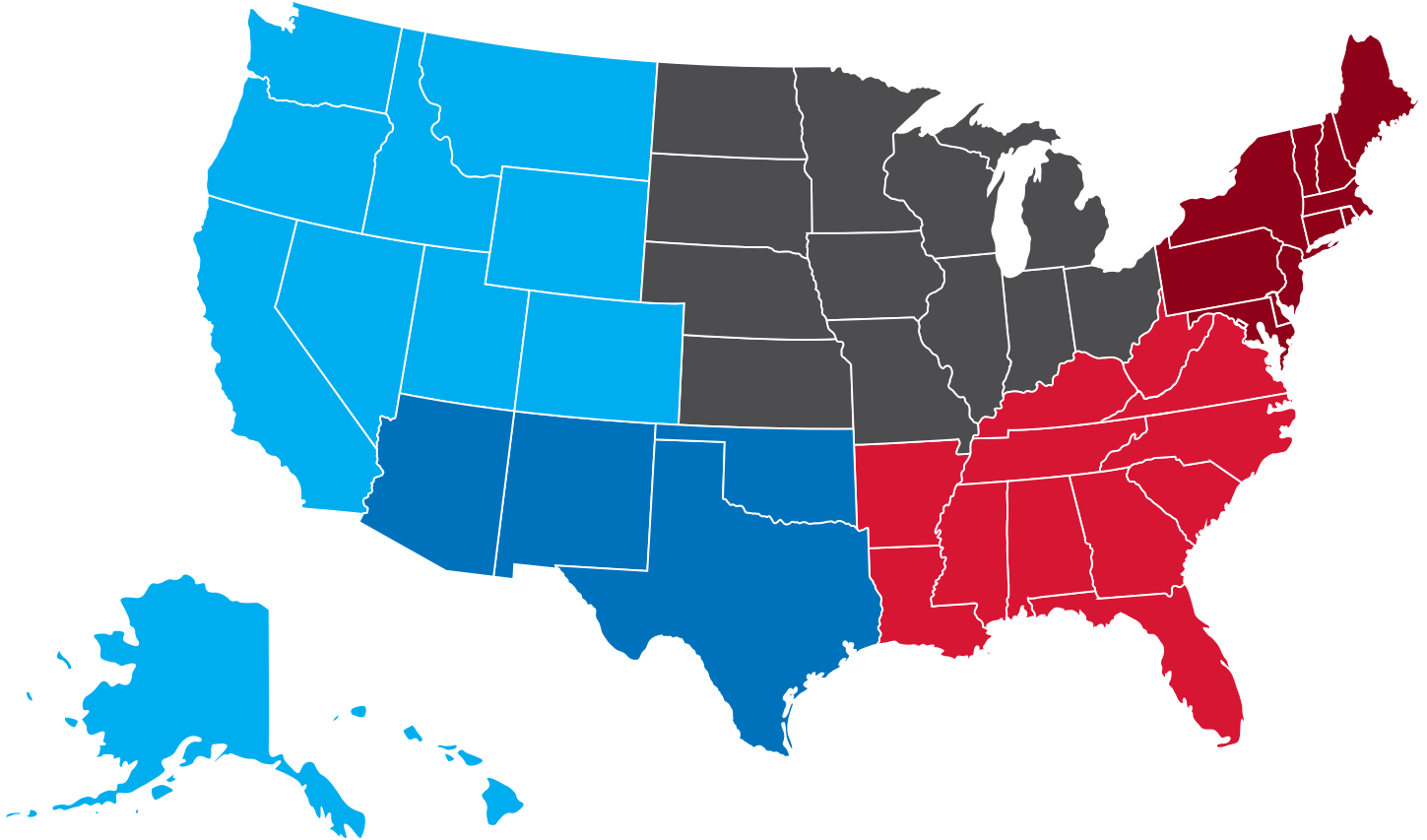
**NEW BUSINESS  
MODELS AND  
NEW JOBS**



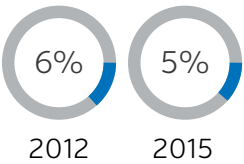
The Mobility Industry is a significant contributor to the growth of the manufacturing and high-tech sectors. And **MEMA** is pulling it all together.

\* Source: National Association of Manufacturers

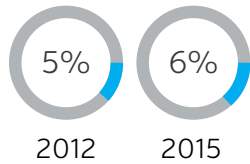
# 871,831 TOTAL U.S. DIRECT EMPLOYMENT



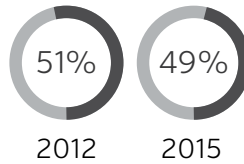
## SOUTHWEST



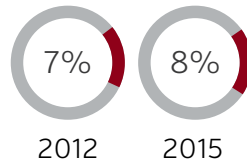
## WEST



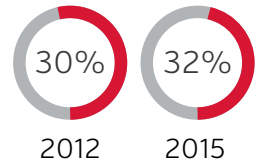
## MIDWEST



## NORTHEAST



## SOUTHEAST



# 871,831 TOTAL U.S. DIRECT EMPLOYMENT

MICHIGAN 125,909	TEXAS 33,132	ARKANSAS 10,495	WASHINGTON 4,687	NORTH DAKOTA 1,994	DELAWARE 400
OHIO 96,238	CALIFORNIA 31,190	MISSISSIPPI 9,706	ARIZONA 4,672	RHODE ISLAND 1,879	MONTANA 269
INDIANA 88,306	PENNSYLVANIA 27,920	FLORIDA 8,827	OREGON 4,473	MARYLAND 1,720	WYOMING 136
TENNESSEE 50,128	GEORGIA 23,836	OKLAHOMA 8,676	WEST VIRGINIA 4,069	NEW HAMPSHIRE 1,389	ALASKA 30
KENTUCKY 47,658	NEW YORK 19,517	NEBRASKA 8,415	NEW JERSEY 4,028	VERMONT 745	HAWAII 21
ALABAMA 41,107	WISCONSIN 18,200	UTAH 7,884	SOUTH DAKOTA 3,931	IDAHO 616	WASHINGTON D.C. 2
ILLINOIS 38,394	MISSOURI 16,301	MINNESOTA 6,366	LOUISIANA 3,167	MAINE 549	
NORTH CAROLINA 33,825	IOWA 16,114	KANSAS 6,270	COLORADO 3,120	NEW MEXICO 525	
SOUTH CAROLINA 33,766	VIRGINIA 13,277	CONNECTICUT 4,958	MASSACHUSETTS 2,510	NEVADA 484	





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