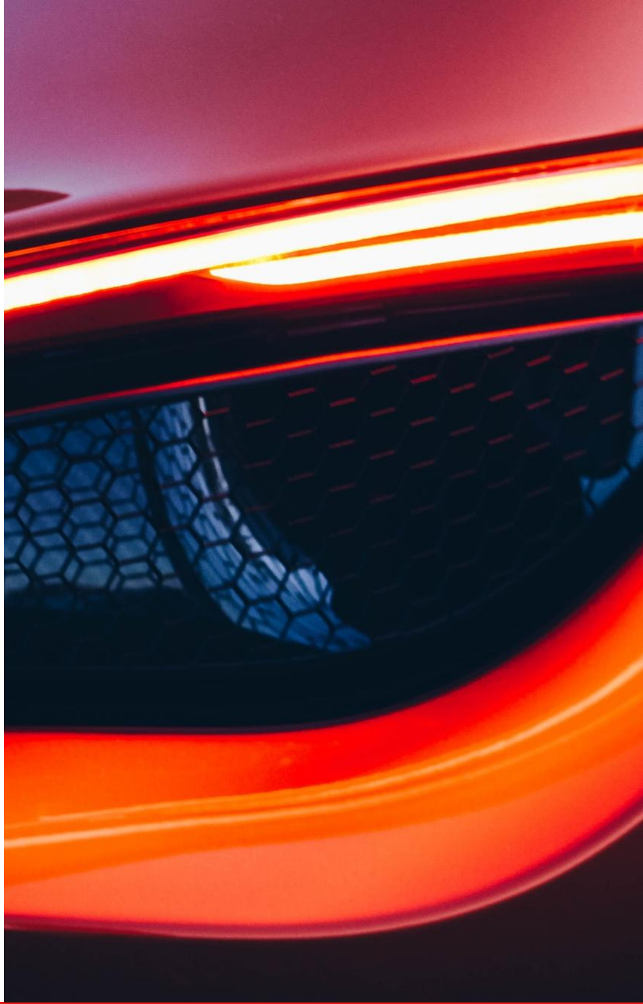
# MEMA OE Suppliers Vehicle Supplier Barometer Q3 2025

## Talent and HR

October 10, 2025



# MEMA OE Vehicle Supplier Barometer: Executive Summary

## Supplier Barometer Index (SBI)

Q3 SBI Score = 39;
up from Q1 level of 32

Sentiment for the third quarter of 2025 continues to reflect industry pressures, for the fourteenth straight quarter of building pessimism on net. The twelve-month business outlook remains pessimistic, on net, across firms of all sizes. However, there was sequential improvement for most size cohorts in comparison to Q2 2025. Commercial vehicle suppliers are more pessimistic than their light vehicle peers as their market is suffering from rapidly declining demand and increased costs.

Changes in government trade policies continued as the greatest threat to the industry over the coming 12 months and deteriorated slightly from Q2 on new rounds of tariffs on commodities and uncertainty of additional tariffs.

Concerns of poor sales of vehicles in programs supplied remain elevated but showed minor improvement from prior quarter. Suppliers are concerned with underperforming electric vehicle programs and uncertainty around tariff affordability concerns and continued declines in orders for commercial vehicles.

New orders and production continue to decrease widely on both a year-over-year basis. Customer inventories are building, and the backlog of orders is declining. Costs continue to rise.

Gaps between responsibilities and skills and the gap between current and aspired company culture closed from last year.

Skill gaps shrank from last year, with 38% of respondents indicating they have moderate to wide gaps, down from 40% last year.

Cultural gaps decreased in comparison to 2024, with 34% of respondents indicate moderate to wide gaps between their current and aspired culture, down from 38% last year.

# MEMA OE Vehicle Supplier Barometer: Q3 2025 - Executive Summary

The critical need for hourly workers eased substantially from last year in the U.S. and Canada while only showing marginal improvement in Mexico. Other job functions showed a marked improvement.

Voluntary monthly turnover for hourly employees decreased slightly in Mexico from prior year, while U.S. and Canada turnover declined materially. Turnover rates remain elevated across North America, however.

On net, over the past 12-months and next 12-months, suppliers in the U.S. and Canada expect to decrease headcounts for salary and hourly positions while headcounts in Mexico are expected to grow.

Lack of qualified candidates remains the top hiring constraint, but conditions extended their improvement from last year. Competition from other industries remain prevalent but showed significant improvement from last year.

Regional employment is not anticipated to grow faster than the regional share of corporate sales in any region globally.

73% of suppliers have at least moderately integrated Automation into their North American operations and plan to become increasingly automated over the next two years.

Over half of suppliers are currently leveraging AI productivity tools to increase efficiency. While an addition quarter are in the planning stage of integration.

Suppliers' remote work policy is expected to grow to 3.6 days per week in office, next year, from 3.0 days in 2024, on average. The most common policy is still 3 days per week.

Key themes for career path and succession planning prioritize developing employees internally through training and tuition reimbursement, while focusing on high performing candidates and promoting internally.

Cost pressures continue as the supply base is budgeting next year's wage growth at 2.6% and 2.1% for hourly and salary employees, respectively. Growth in benefit offerings has cooled slightly from last year.

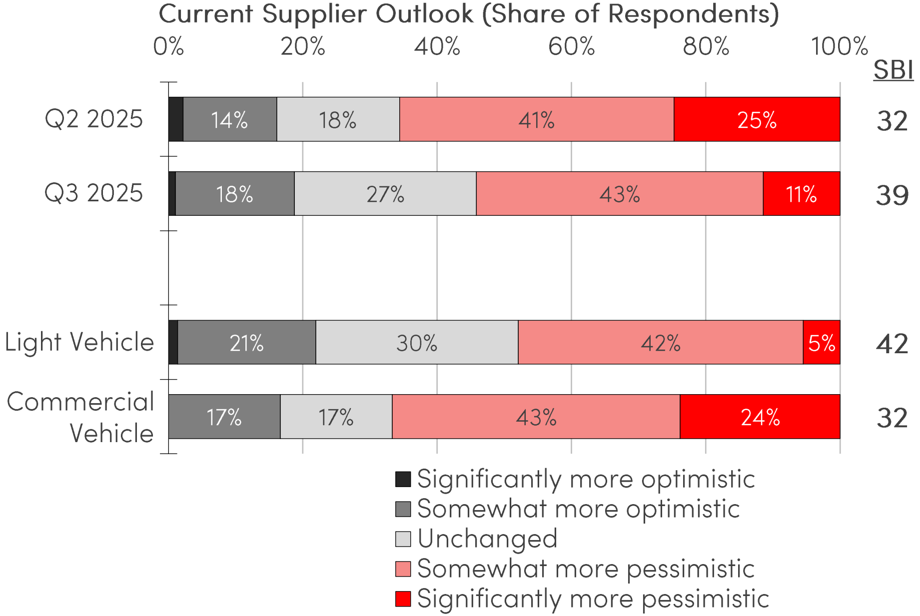
Just over half of suppliers feel they have at least moderately integrated inclusion into their talent strategy, a seven percentage point improvement from last year.

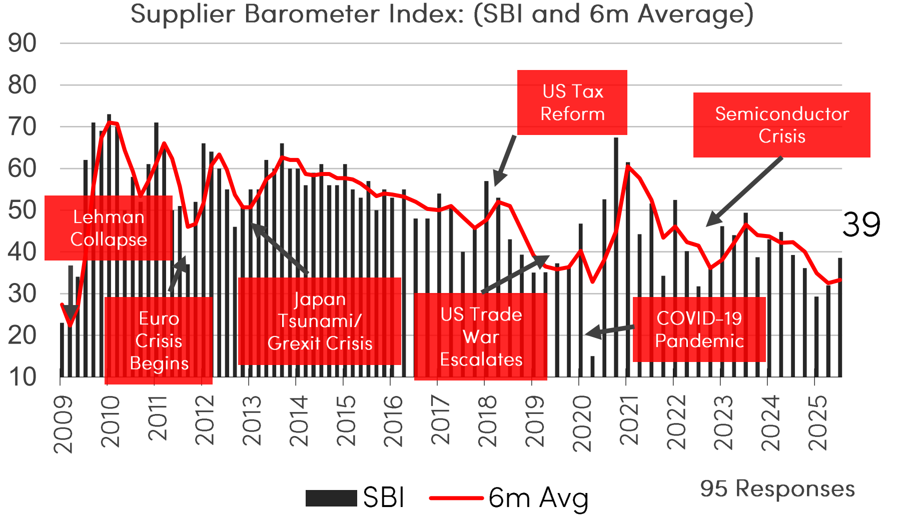
# Supplier Outlook

## Q3 2025 - MEMA OE Vehicle Supplier Barometer

# MEMA OE Vehicle Supplier Barometer: Q3 2025 – Results

Describe the general twelve-month outlook for your business. Over the past three months, has your opinion become…?



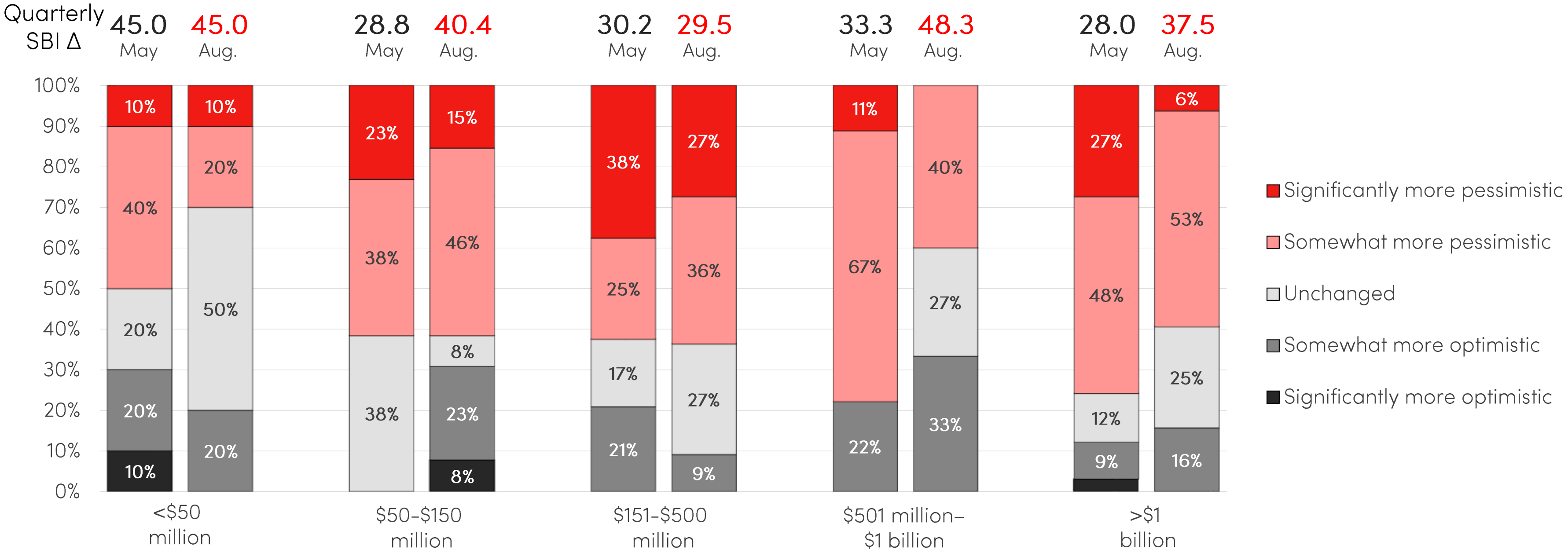




*Data prior to 2024 Light Vehicle Only

The outlook for Q3 2025 rose seven points from the second quarter to 39 but remains in pessimistic territory, and marks fourteen consecutive quarters of building pessimism.

# MEMA OE Vehicle Supplier Barometer: Q3 2025 – Results by Revenue

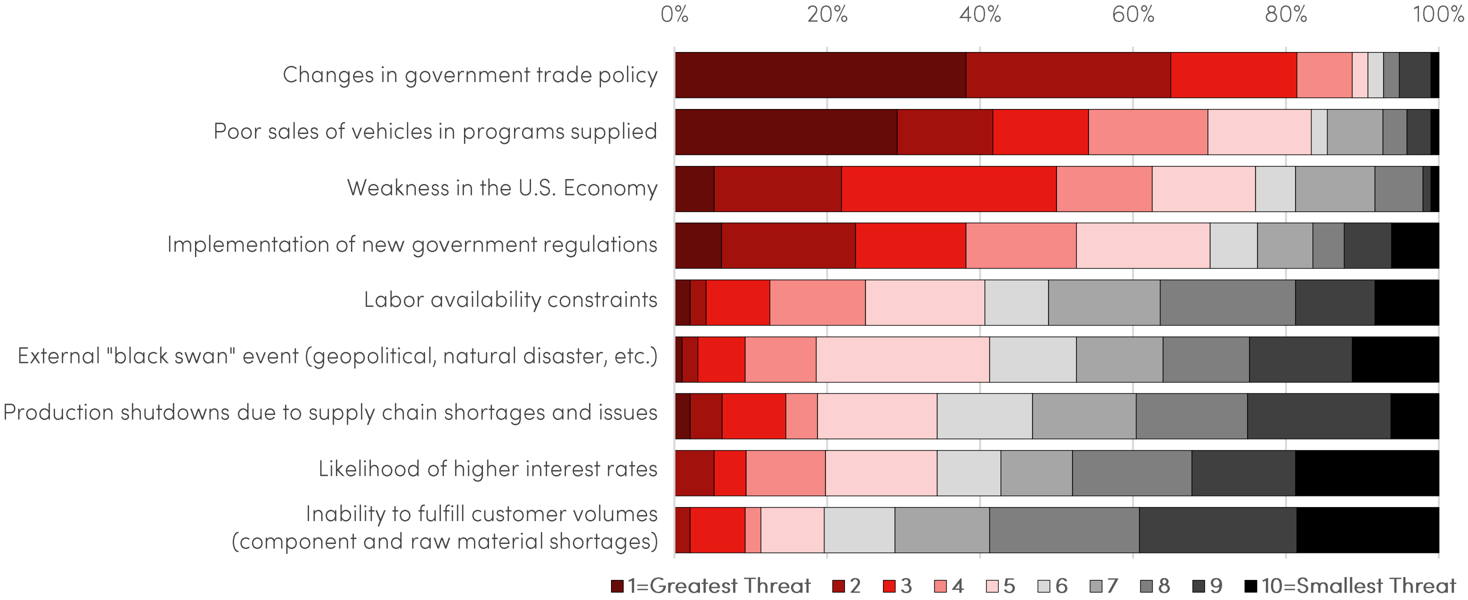
Describe the general twelve-month outlook for your business. Over the past three months, has your opinion become…?




The twelve-month business outlook remains pessimistic, on net, across firms of all sizes.
However, there was sequential improvement for most size cohorts in comparison to Q2 2025.

# MEMA OE Vehicle Supplier Barometer
# Q3 2025 - Industry Threats Results

## What are the greatest threats to the industry over the next 12 months?




| | Weighted Average | | | |
|---|---|---|---|---|
| | Q3 '25 | Q2 '25 | LV | CV |
| Changes in government trade policy | 2.6 | 2.8 | 2.6 | 2.4 |
| Poor sales of vehicles in programs supplied | 3.5 | 3.3 | 3.7 | 3.3 |
| Weakness in the U.S. Economy | 4.1 | 4.0 | 4.3 | 3.5 |
| Implementation of new government regulations | 4.7 | 4.7 | 4.8 | 4.3 |
| Labor availability constraints | 6.3 | 6.2 | 6.2 | 6.5 |
| External "black swan" event (geopolitical, natural disaster, etc.) | 6.5 | 5.8 | 6.4 | 6.6 |
| Production shutdowns due to supply chain shortages and issues | 6.5 | 5.6 | 6.3 | 6.8 |
| Likelihood of higher interest rates | 6.9 | 6.0 | 7.0 | 6.7 |
| Inability to fulfill customer volumes (component and raw material shortages) | 7.5 | 7.0 | 7.3 | 7.5 |

Changes in government trade policies remains as the greatest threat to the industry over the coming 12-months. The risk associated from "black swan" events, higher interest rates and supply chain disruption moderated from Q2.

# MEMA OE Vehicle Supplier Barometer:
## Q3 2025 - Industry Indicators

For the following indicators, please indicate what change, if any, your company has experienced over the following time frames.

| | Total Industry | | Light Vehicle | | Commercial Vehicle | |
|---|---|---|---|---|---|---|
| | 12-Month Chg. | 1-Month Chg. | 12-Month Chg. | 1-Month Chg. | 12-Month Chg. | 1-Month Chg. |
| New orders | 35 | 44 | 42 | 51 | 18 | 29 |
| Production | 31 | 40 | 37 | 46 | 20 | 25 |
| Employment | 31 | 38 | 35 | 43 | 27 | 30 |
| Supplier Deliveries | 42 | 42 | 47 | 47 | 33 | 34 |
| Inventories | 46 | 43 | 44 | 42 | 46 | 43 |
| Customers' Inventories | 53 | 54 | 55 | 55 | 50 | 53 |
| Costs | 89 | 78 | 88 | 77 | 89 | 79 |
| Backlog of Orders | 37 | 40 | 44 | 45 | 23 | 29 |
| Imports | 36 | 40 | 38 | 43 | 35 | 38 |
| New Export Orders | 41 | 45 | 46 | 49 | 35 | 40 |

Diffusion Index = Σ (% Responding Decelerated x 0, % Responding Unchanged x 50, % Responding Accelerated x 100)
Lower Limit = 0
Neutral = 50
Upper Limit = 100

New orders and production continue to decrease widely on both a year-over-year basis. Customer inventories are building, and the backlog of orders is declining. Costs continue to rise.

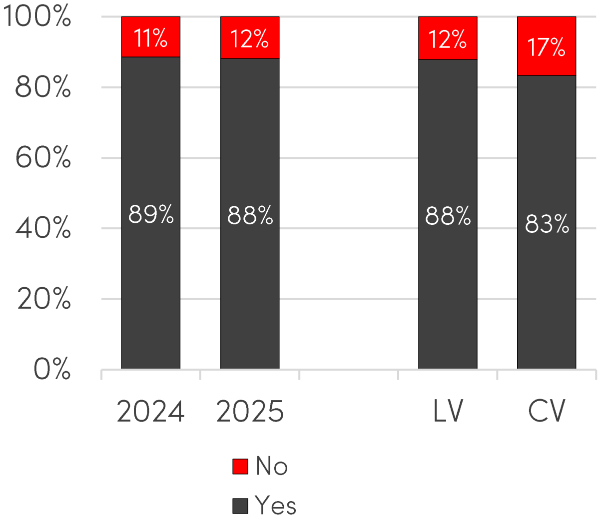
# HR and Talent

Q3 2025 - MEMA OE Vehicle Supplier Barometer

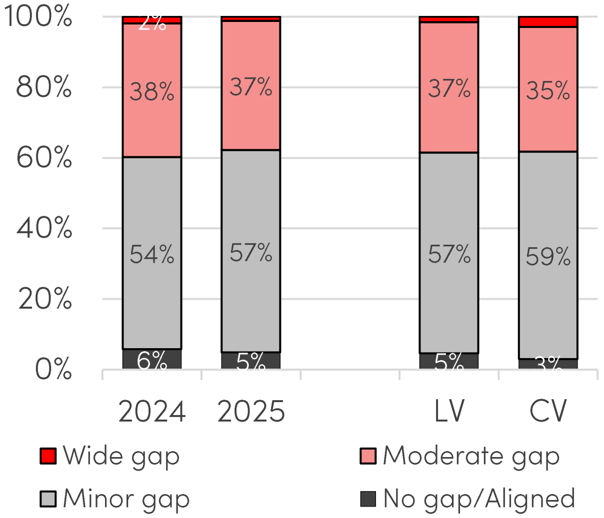
# Roles/Responsibilities vs. Skills
# Q3 2025 - North America

Given competitive hiring pressures and your effort to retain and capture new talent...

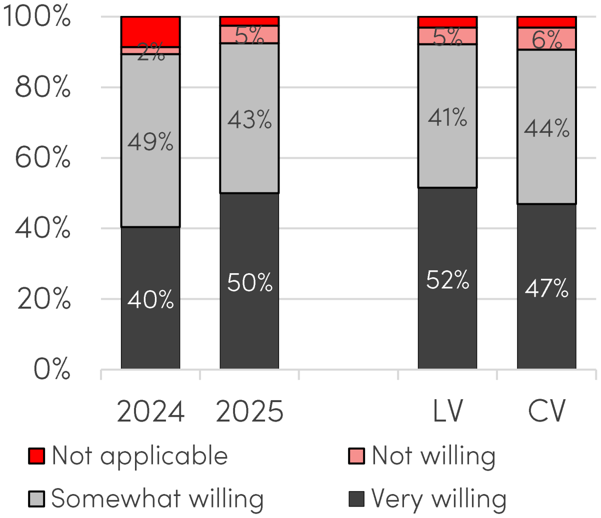
Are you evaluating the gaps between roles/responsibilities vs. skills in your organization?




If yes, what is the magnitude of each gap?



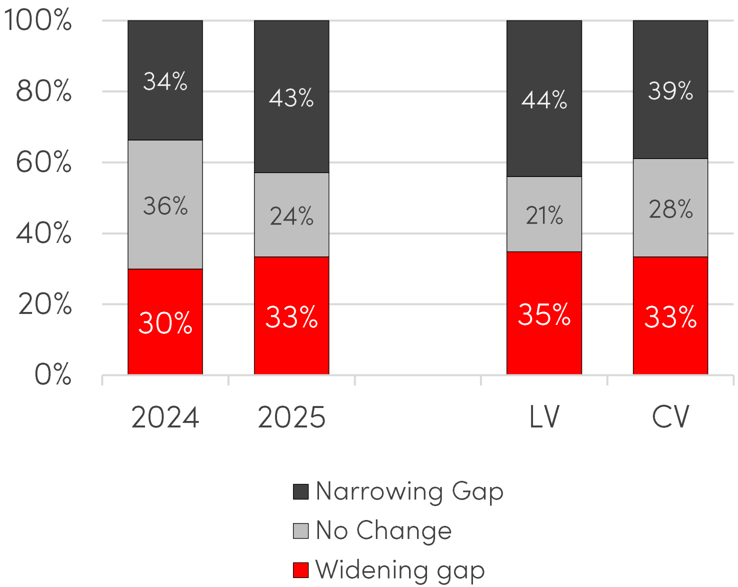

If yes, how willing are you to embrace the scope of change needed to close each gap?




Skill gaps shrank from last year, with 38% of respondents indicating they have moderate to wide gaps, down from 40% last year.

# Roles/Responsibilities vs. Skills
# Q3 2025 - North America

## How do you see this changing over the next 1 to 3 years?




## What are you doing to adapt your organization to each of these changes?

Selected responses:

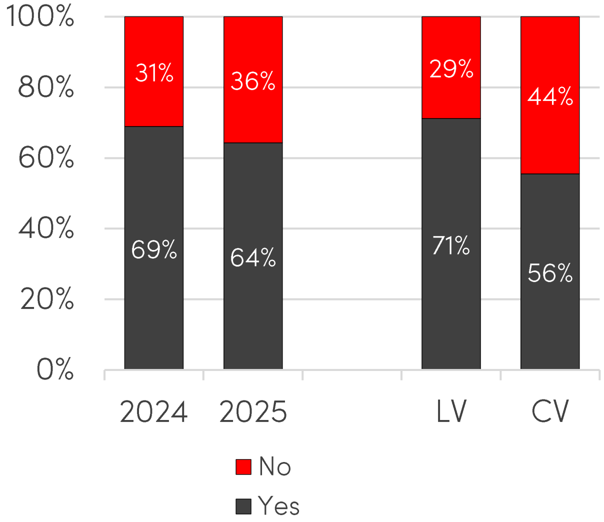
- The main potential gap we see is in automating indirect processes through new BI tools and/or AI.
- Industry is changing rapidly and needs skills to be agile and flexible.
- Focused on hiring data engineers, automation engineers, etc..
- Re-defining roles and responsibilities in job descriptions. Increasing the implementation of automated processes that eliminate unnecessary paperwork.
- Skills matrices and development programs through workforce educational partnerships
- Redefining expectations of each job, highlighting key areas of need for success. Offerring training to further develop/mitigate GAPS identified.
- While we are reducing employees due to volume & sales reduction, we are also taking advantage to review roles vs skills hiring to close the gap and providing training to persons with potential.
- Upskilling for operational automation projects. Upskilling admin for AI tool usage

Suppliers continue to see the gap between roles and responsibilities closing over the next 1-3 years. They are focused on upskilling and training, role redefinition, and adapting to AI and automation.

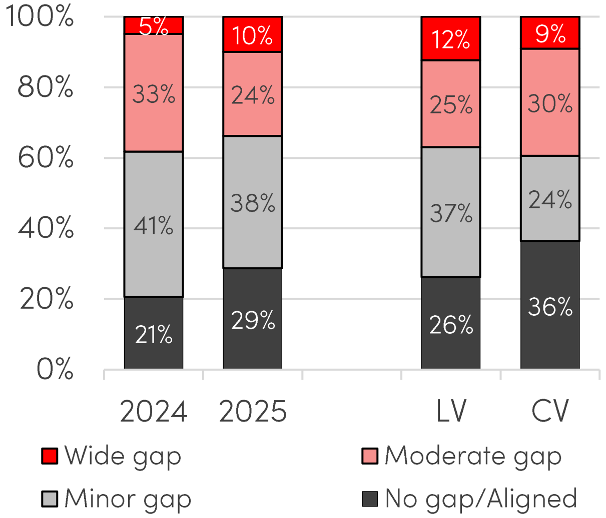
# Current Culture vs. Aspired Culture
# Q3 2025 - North America

## Given competitive hiring pressures and your effort to retain and capture new talent...

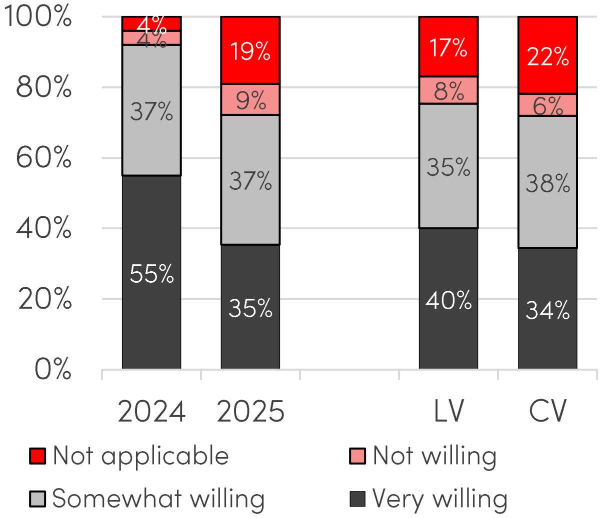
Are you evaluating the gaps between current vs. aspired culture in your organization?




If yes, what is the magnitude of each gap?



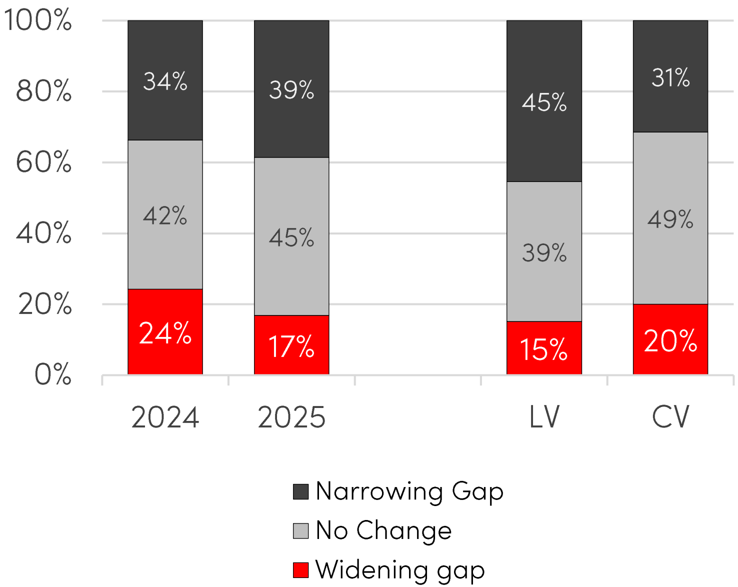

If yes, how willing are you to embrace the scope of change needed to close each gap?




Cultural gaps decreased in comparison to 2024, with 34% of respondents indicate moderate to wide gaps between their current and aspired culture, down from 38% last year.

# Current Culture vs. Aspired Culture Q3 2025 - North America

## How do you see this changing over the next 1 to 3 years?




## What are you doing to adapt your organization to each of these changes?

Selected responses:

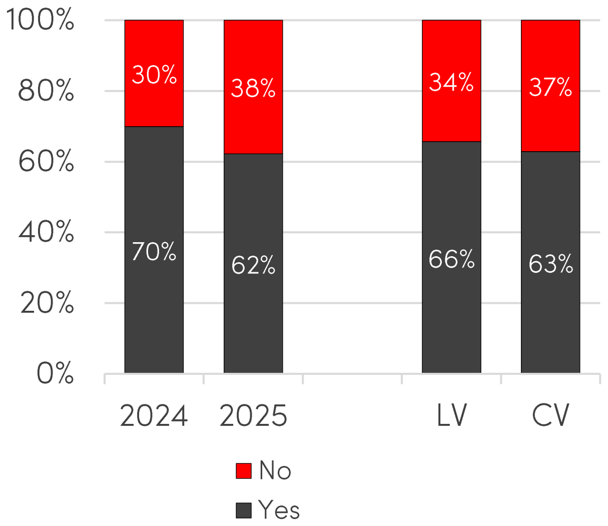
- We monitor / evaluate culture frequently and are quite pleased with where it is. Open to change but don't anticipate any needs.
- Investing in modern workplaces, particularly in buildings which have not had much investment over past 10 years.
- Making changes to adapt to an aging workforce.
- Old school v new school-> major culture clash; not attracting young talent
- Continued focus on company operating model and expectations of our people.
- Intentional communications with all staff levels, shop floor communications at plants
- Reinforcing importance of having a learning, proactive, team-oriented culture
- Implemented a new culture initiative to drive the environment needed to achieve our strategic goals

Suppliers are focused on balancing cultural evolution, workplace environment improvements, and change management with the challenges of workforce demographics, and talent attraction.

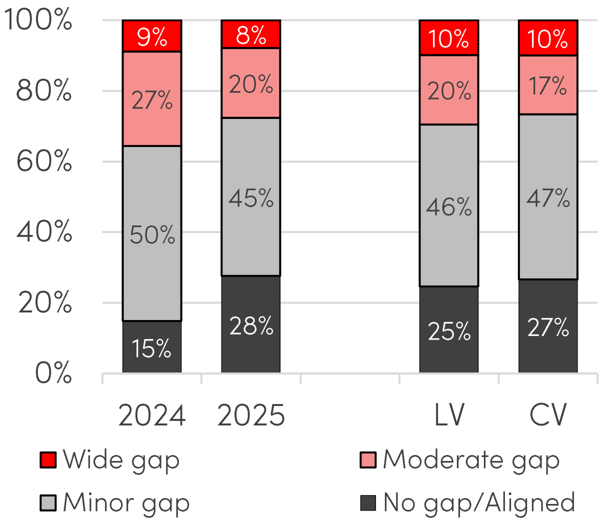
# Programs to Attract and Reward Talent
# Q3 2025 - North America

Given competitive hiring pressures and your effort to retain and capture new talent...

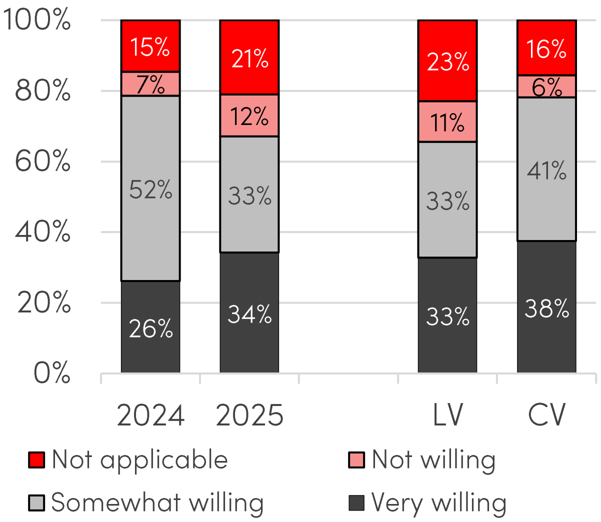
Are you evaluating the gaps between programs to attract and reward talent in your organization?




If yes, what is the magnitude of each gap?



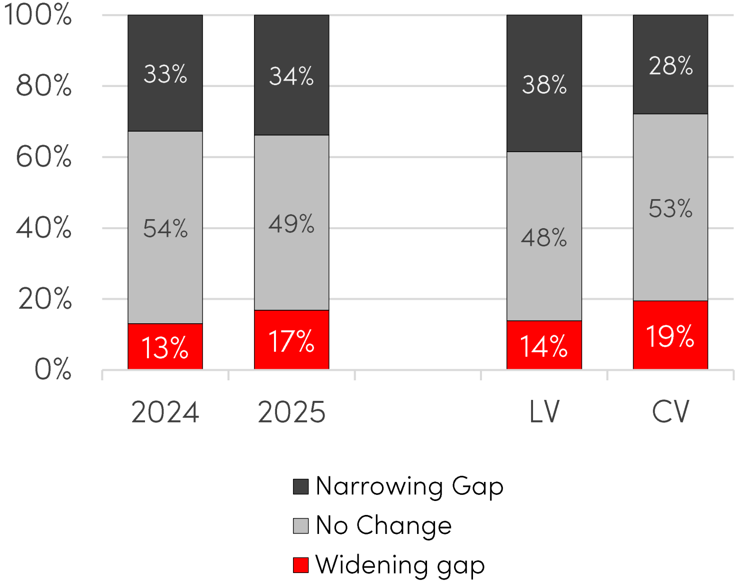

If yes, how willing are you to embrace the scope of change needed to close each gap?




The gap between supplier programs to attract and reward talent narrowed from last year, with 26% indicating moderate to wide gaps, down from 36% in 2024.

# Programs to Attract Talent
# Q3 2025 - North America

## How do you see this changing over the next 1 to 3 years?




## What are you doing to adapt your organization to each of these changes?

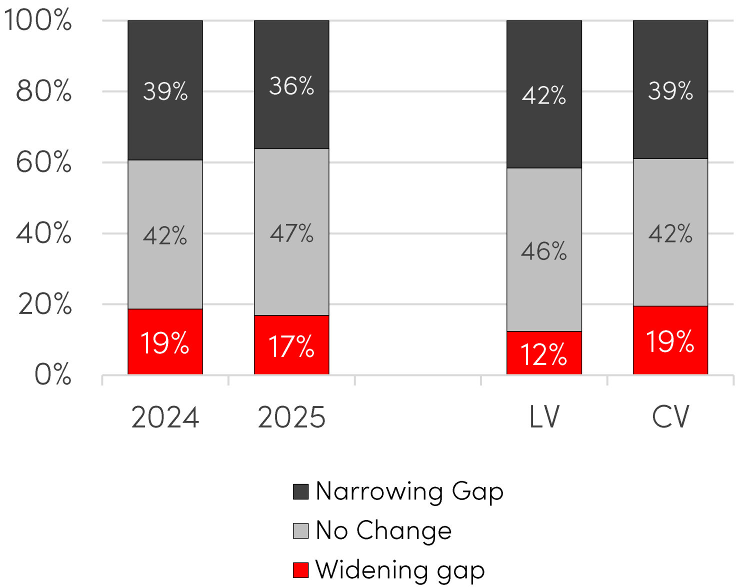
Selected responses:

- Our programs are pretty solid, however, continuously changing to fill our needs.
- We have a robust internship program – this has been instrumental for us
- We don't see a need for this right now due to lower production volumes. Focused on retaining our current talent.
- Development of new programs and improvement of existing programs.
- Leveraging employee networks to hire based on recommendations.
- Have university and local community college partnerships in place
- Currently resources are limited to focus 100% on this so concern we may have issues here.
- Adjusting our approach to the expectations of the next generation workforce is mandatory to narrow our gap here.

Suppliers emphasize ongoing talent acquisition challenges, resource limitations, reliance on referrals and branding, and the need to adapt strategies for the next-generation workforce.

# Programs to Retain Talent
# Q3 2025 - North America

## How do you see this changing over the next 1 to 3 years?




## What are you doing to adapt your organization to each of these changes?

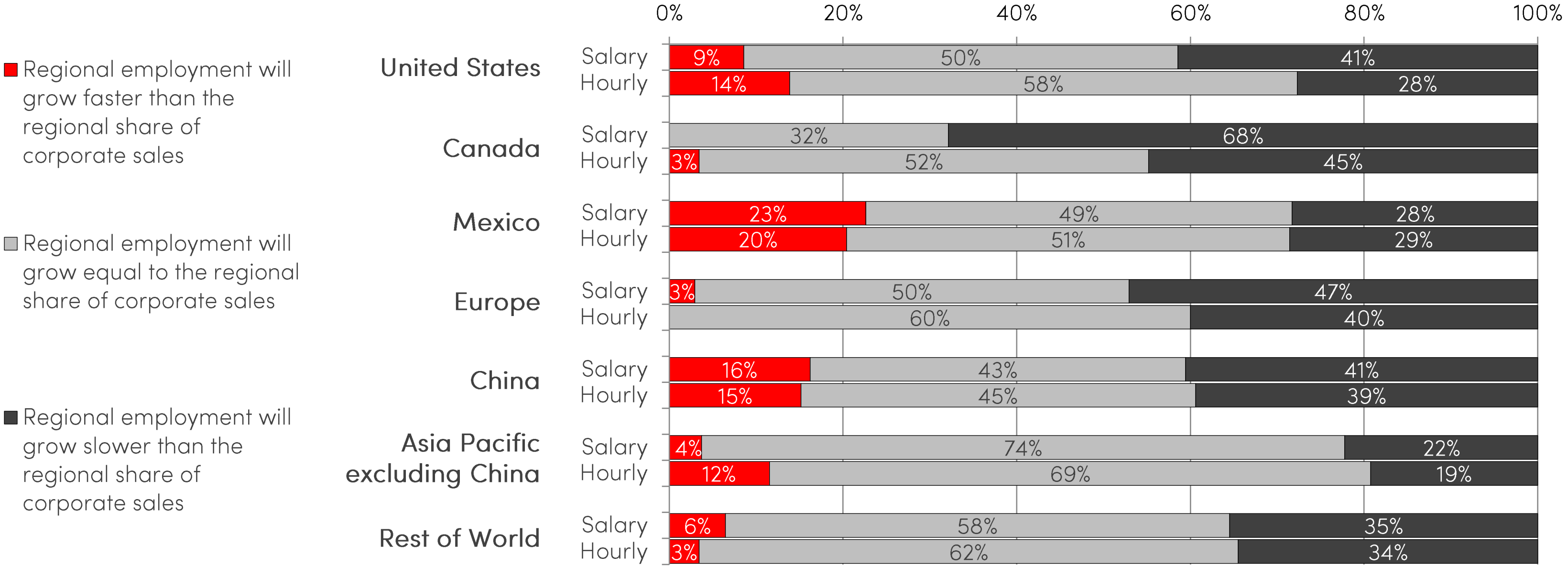
Selected responses:

- Balancing between in-office (best) and people's request for home flexibility will continue to be an area we must evaluate.
- Significant time and investment in training, development programs.
- Modern workplaces, increased flexibility, interesting/challenging tasks with respect to data engineering and plant automation.
- Not enough promotional roles available; people working beyond retirement age
- Started mentoring program for Hi Potentials, Hi performers.
- Have established Associate Resource Groups
- Implementing various learning opportunities; career development programs; and recognition programs.

Suppliers see employee retention is supported by development programs, values-driven culture, and flexibility, while noting challenges around limited promotions, workforce demographics, and resource constraints.

# Employment Issues: Q3 2025 - Regional Growth Expectations

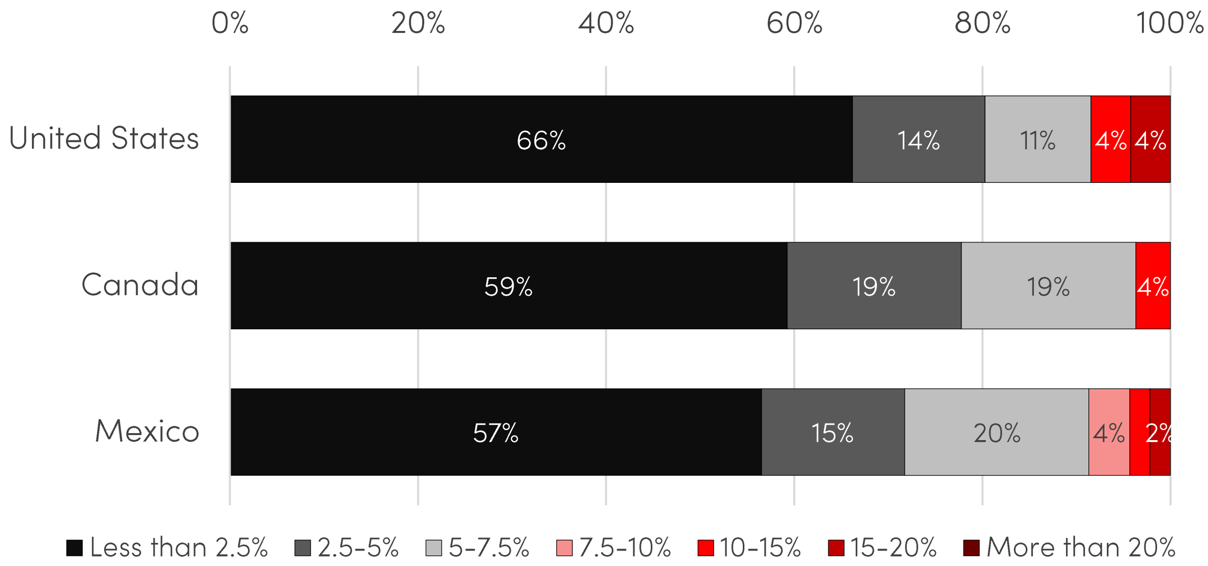
Looking at your current global footprint,
how do you anticipate regional employment levels shifting over the next five years?




Regional employment is not anticipated to grow faster than the regional share of corporate sales in any region globally.

# Employment Issues: Q3 2025 - North American Voluntary Turnover

Estimate your year-to-date 2025 monthly voluntary turnover rates for salary personnel.



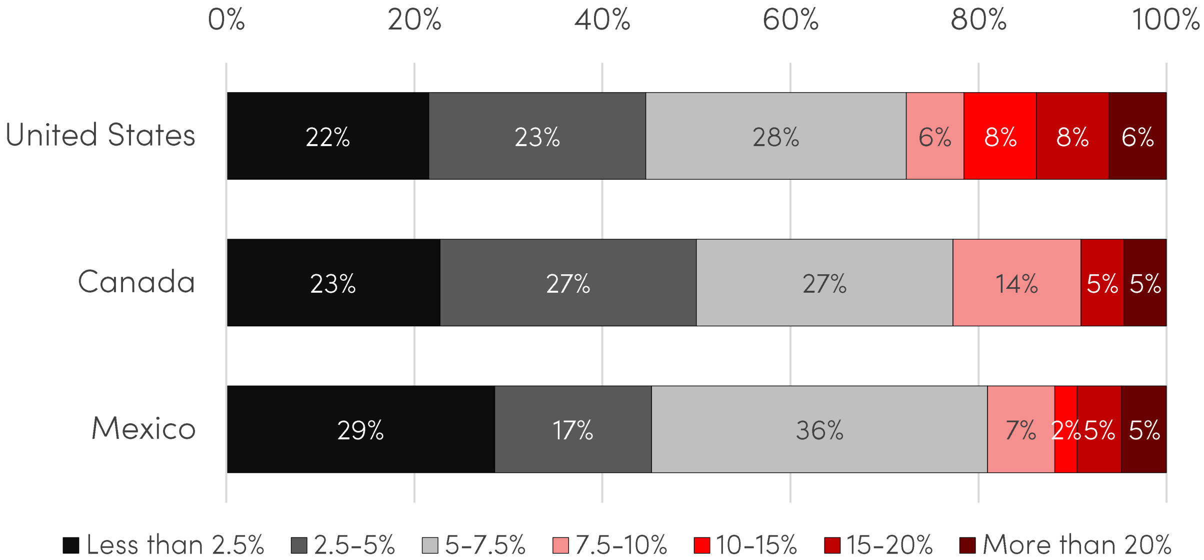

| | Wtd. Avg.* | | | |
|---|---|---|---|---|
| | 2025 | 2024 | Light Vehicle | Commercial Vehicle |
| United States | 3.3% | 4.4% | 3.0% | 3.5% |
| Canada | 3.1% | 3.3% | 2.9% | 2.9% |
| Mexico | 3.5% | 4.8% | 3.8% | 3.0% |

Weighted average assumes the mid-point of each range, >20% = 22.5%

Voluntary monthly turnover for salary employees decreased substantially in the U.S. and Mexico from prior year, while Canada turnover witnessed a moderate decline.

# Employment Issues:
# Q3 2025 - North American Voluntary Turnover

Estimate your year-to-date 2025 monthly voluntary turnover rates for hourly personnel.



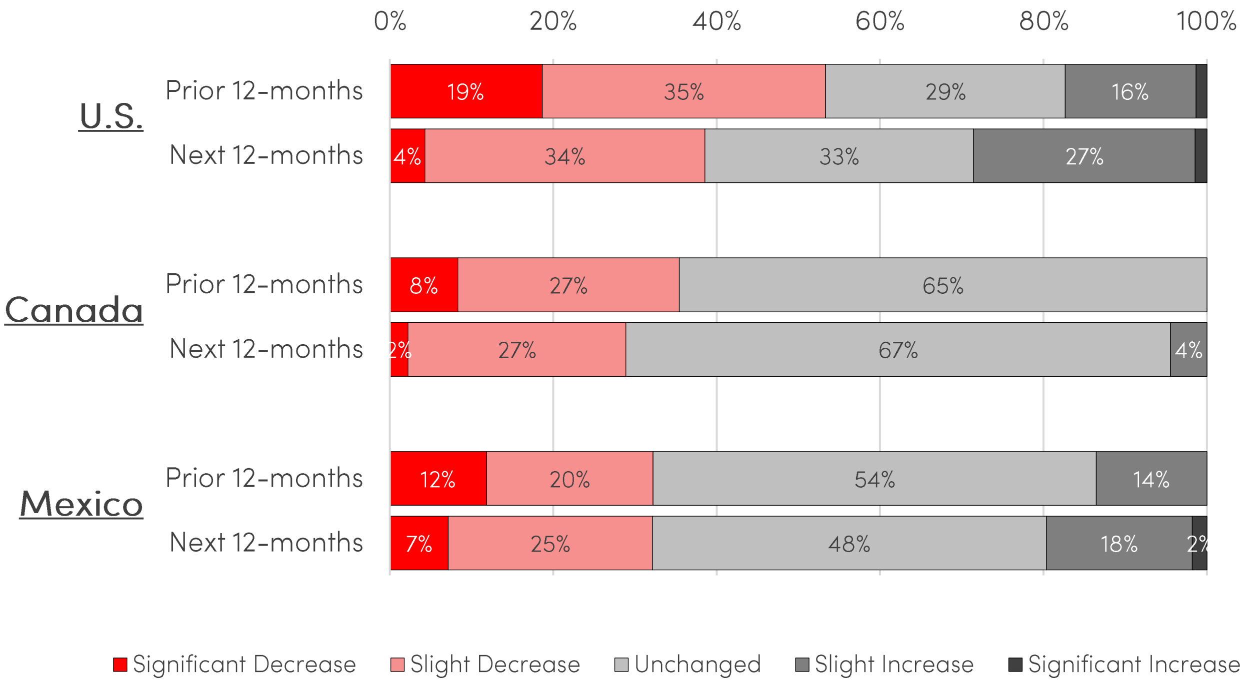

| | Wtd. Avg.* | | | |
|---|---|---|---|---|
| | 2025 | 2024 | Light Vehicle | Commercial Vehicle |
| United States | 7.1% | 7.5% | 6.2% | 7.9% |
| Canada | 6.0% | 5.3% | 5.6% | 6.0% |
| Mexico | 6.0% | 6.8% | 5.9% | 5.4% |

Weighted average assumes the mid-point of each range, >20% = 22.5%

Voluntary monthly turnover for hourly employees decreased slightly in Mexico and the U.S. from prior year, while Canada turnover increased moderately. Turnover rates remain elevated across North America.

# Employment Issues:
# Q3 2025 - Salary Personnel Headcount Changes

Please indicate your headcount changes for Salary Personnel across North America.



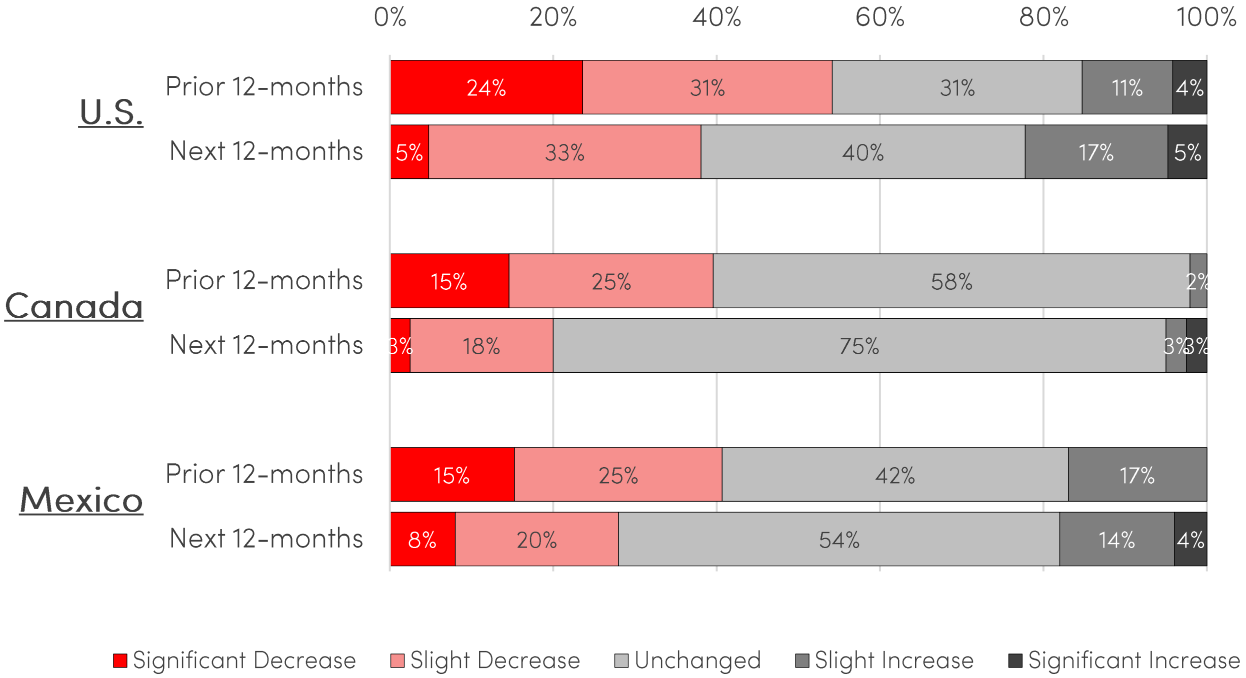

## Index*

| Total Industry | Light Vehicle | Commercial Vehicle |
|---|---|---|
| -27 | -26 | -34 |
| -6 | -4 | -11 |
| -22 | -19 | -16 |
| -13 | -14 | -6 |
| -15 | -14 | -13 |
| -9 | -11 | 7 |

*Index: ∑ (Pct. Responding Significant Decrease*-100, Pct. Responding Slight Decrease*-50, Pct. Responding Unchanged*0, Pct. Responding Slight Increase *50, Pct. Responding Significant Increase*100)

# Employment Issues:
# Q3 2025 - N. American Hourly Personnel Headcount Changes

Please indicate your headcount changes for Hourly Personnel across North America.



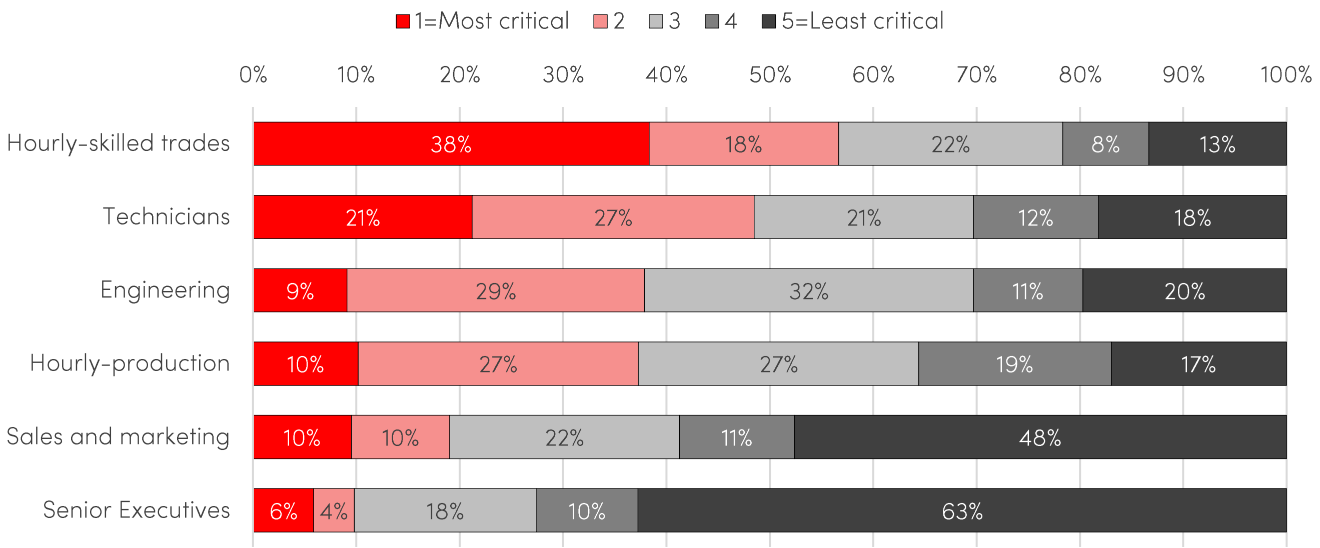

**Index***

| | | Total Industry | Light Vehicle | Commercial Vehicle |
|---|---|---|---|---|
| U.S. | Prior 12-months | -29 | -23 | -41 |
| | Next 12-months | -8 | -7 | 0 |
| Canada | Prior 12-months | -26 | -21 | -17 |
| | Next 12-months | -8 | -7 | 0 |
| Mexico | Prior 12-months | -19 | -15 | -18 |
| | Next 12-months | -7 | -9 | 14 |

*Index: ∑ (Pct. Responding Significant Decrease*-100, Pct. Responding Slight Decrease*-50, Pct. Responding Unchanged*0, Pct. Responding Slight Increase *50, Pct. Responding Significant Increase*100)

# Employment Issues:
# Q3 2025 - Labor Acquisition in the U.S.

Based on current open requisitions, rate each of the following job classification and positions (most critical to least critical) where you have HR shortages



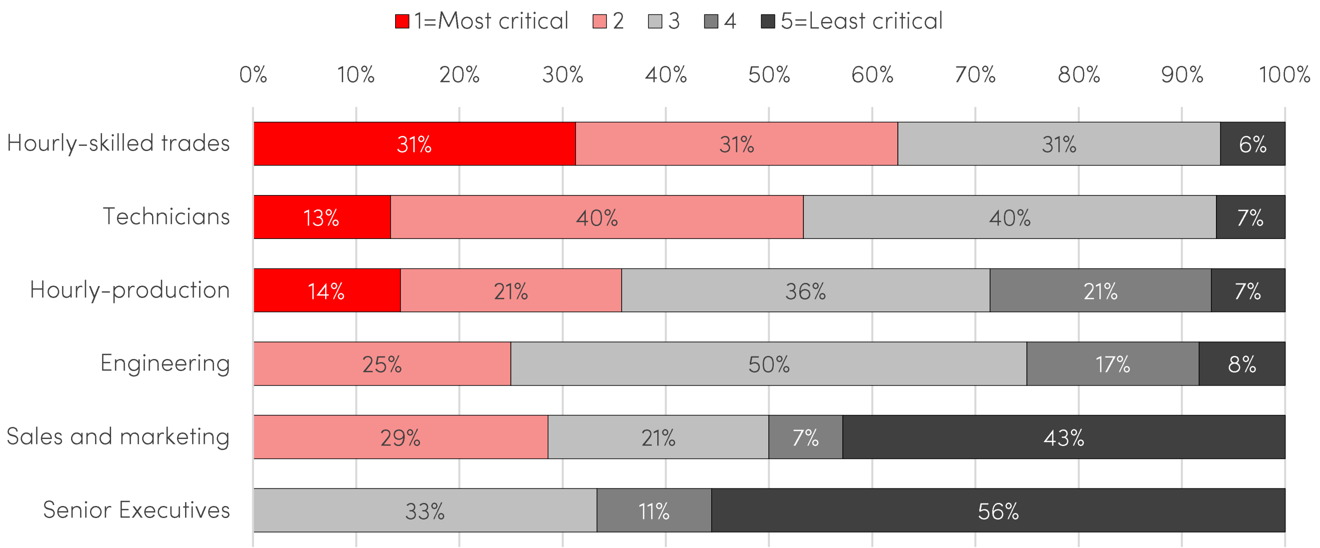

**Wt. Avg.**

| | Q3 2025 | Q4 2024 | LV | CV |
|---|---|---|---|---|
| Hourly-skilled trades | 2.4 | 2.1 | 2.2 | 2.8 |
| Technicians | 2.8 | 2.6 | 2.7 | 3.2 |
| Engineering | 3.0 | 2.6 | 2.9 | 3.6 |
| Hourly-production | 3.1 | 2.8 | 2.9 | 3.3 |
| Sales and marketing | 3.8 | 3.6 | 3.7 | 3.9 |
| Senior Executives | 4.2 | 4.2 | 4.2 | 4.5 |

The critical need for hourly workers eased substantially from last year.
Other job functions showed a marked improvement.

# Employment Issues:
# Q3 2025 - Labor Acquisition in Canada

Based on current open requisitions, rate each of the following job classification and positions (most critical to least critical) where you have HR shortages



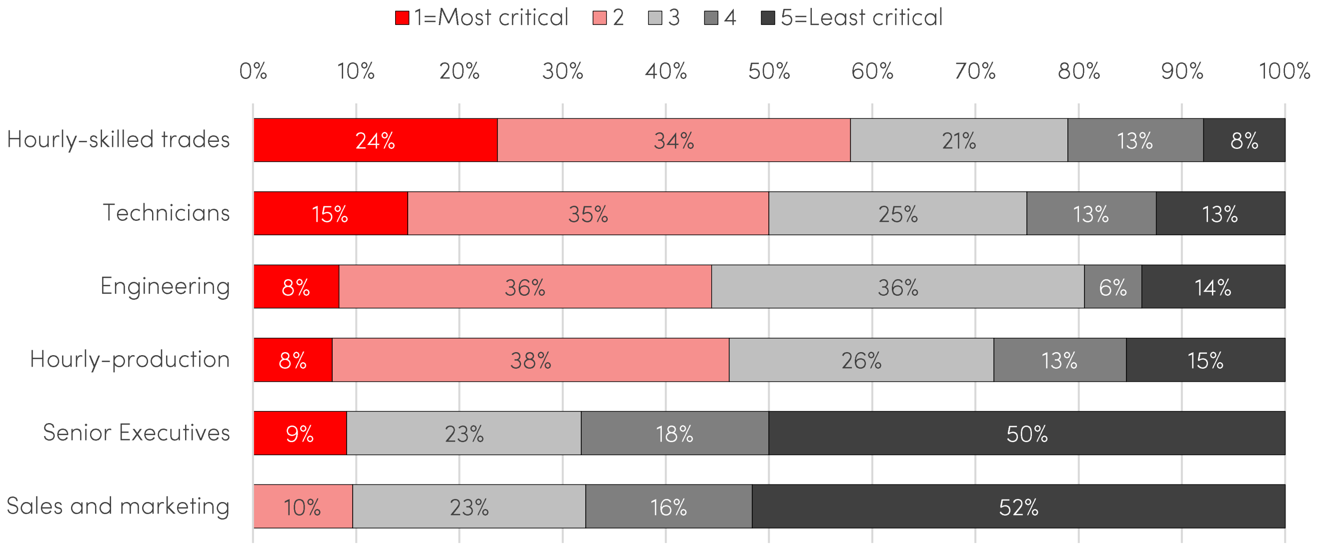

Wt. Avg.

| | Q3 2025 | Q4 2024 | LV | CV |
|---|---|---|---|---|
| Hourly-skilled trades | 2.2 | 2.7 | 2.0 | 3.3 |
| Technicians | 2.5 | 2.6 | 2.3 | 3.3 |
| Hourly-production | 2.9 | 3.3 | 2.7 | 4.0 |
| Engineering | 3.1 | 3.4 | 2.9 | 4.0 |
| Sales and marketing | 3.6 | 3.9 | 3.7 | 3.5 |
| Senior Executives | 4.2 | 4.9 | 4.1 | 5.0 |

Critical need for almost all categories of workers improved from last year in Canada, with hourly-production improving most significantly.

# Employment Issues: Q3 2025 - Labor Acquisition in Mexico

Based on current open requisitions, rate each of the following job classification and positions (most critical to least critical) where you have HR shortages



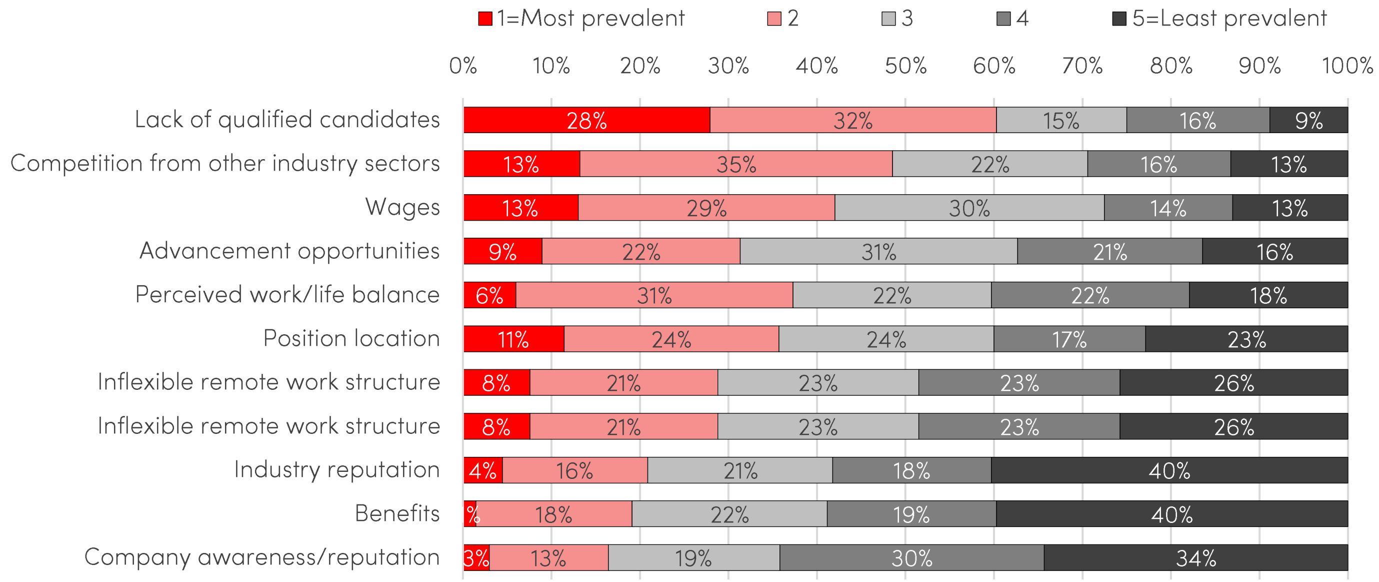

**Wt. Avg.**

| | Q3 2025 | Q4 2024 | LV | CV |
|---|---|---|---|---|
| Hourly-skilled trades | 2.5 | 2.2 | 2.4 | 3.3 |
| Technicians | 2.7 | 2.6 | 2.7 | 3.5 |
| Engineering | 2.8 | 2.8 | 2.8 | 3.7 |
| Hourly-production | 2.9 | 2.5 | 2.8 | 3.7 |
| Senior Executives | 4.0 | 3.8 | 3.9 | 4.3 |
| Sales and marketing | 4.1 | 4.0 | 4.0 | 4.1 |

Critical needs for hourly-skilled trades and general production workers in Mexico eased significantly from year ago levels, while other areas of work showed improvement from last year as well.

# Employment Issues: Q3 2025 North America - Filling Open Positions

Based on current open requisitions, rate each of the following job classification and positions (most critical to least critical) where you have HR shortages



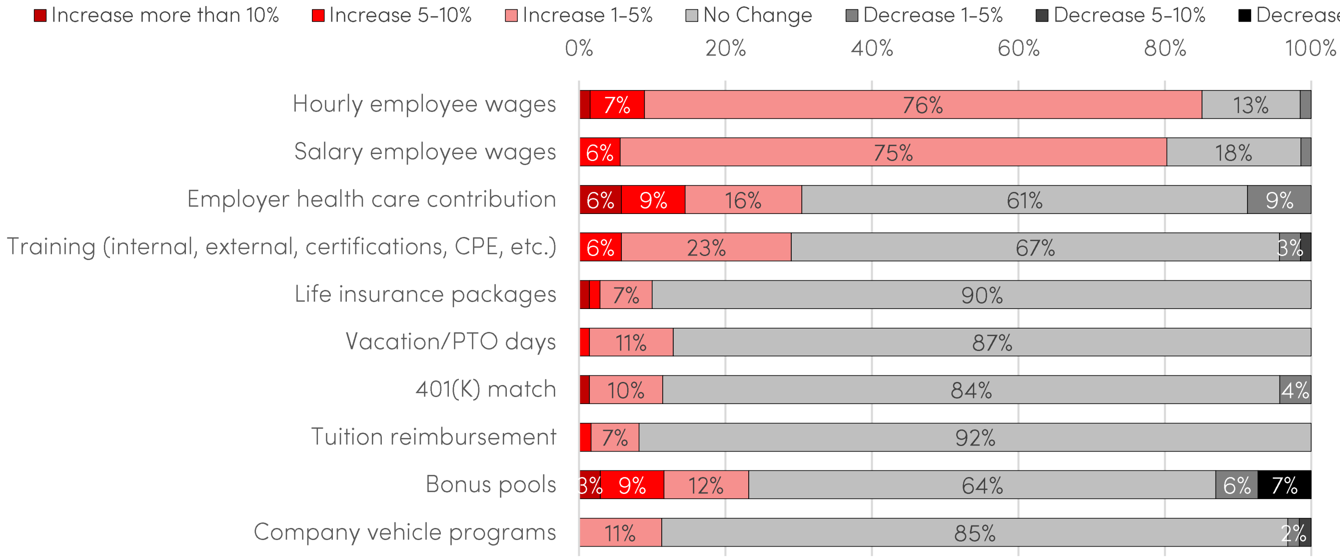

**Wt. Avg.**

| Q3 2025 | Q4 2024 | LV | CV |
|---|---|---|---|
| 2.5 | 2.1 | 2.5 | 2.5 |
| 2.8 | 2.5 | 2.8 | 2.9 |
| 2.9 | 2.7 | 2.9 | 2.9 |
| 3.1 | 3.2 | 3.2 | 2.9 |
| 3.1 | 3.4 | 3.1 | 3.3 |
| 3.2 | 3.1 | 3.4 | 2.8 |
| 3.4 | 3.4 | 3.4 | 3.2 |
| 3.4 | 3.4 | 3.4 | 3.2 |
| 3.7 | 3.6 | 3.8 | 3.6 |
| 3.8 | 3.6 | 3.8 | 3.8 |
| 3.8 | 3.4 | 3.9 | 3.8 |

Lack of qualified candidates remains the top hiring constraint as conditions improved from a year ago. Competition from other industries remain prevalent but showed improvement from last year.

# Employment Issues:
# Q3 2025 - U.S. Benefits Package Changes

For next year, in the United States identify how your benefit packages are expected to change compared to this year.




**Wt. Avg.***

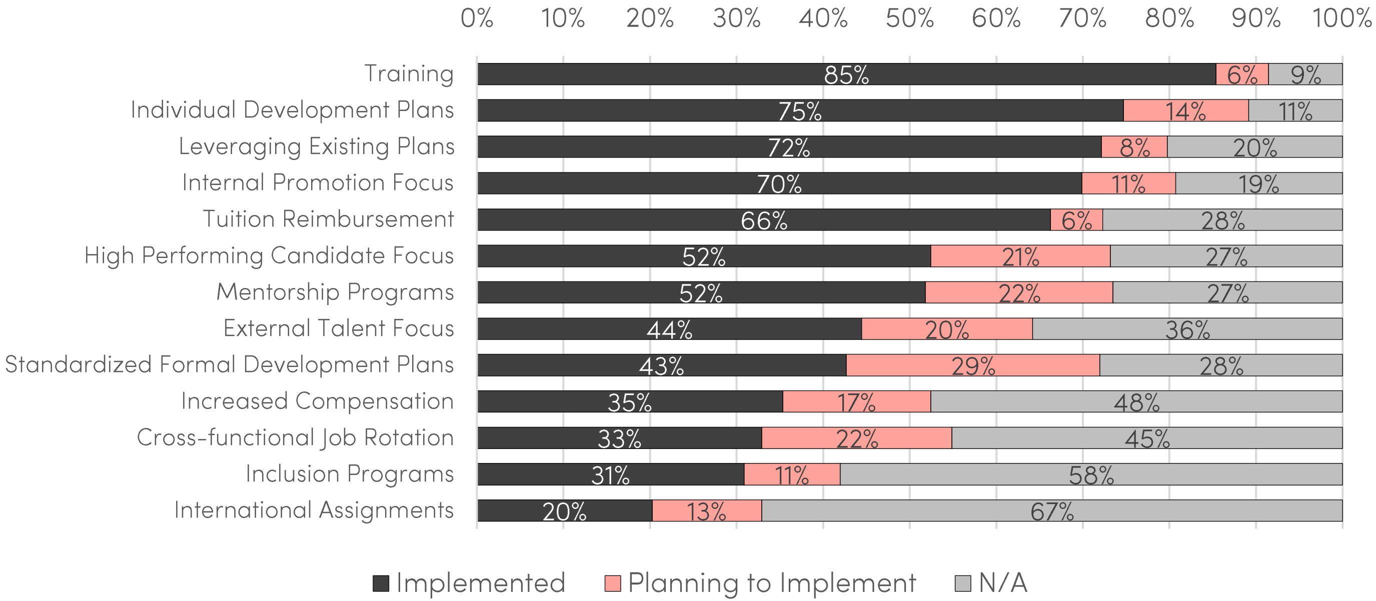
| | Q3 2025 | Q4 2024 | LV | CV |
|---|---|---|---|---|
| Hourly employee wages | 2.6% | 2.8% | 2.8% | 2.5% |
| Salary employee wages | 2.3% | 2.1% | 2.3% | 2.1% |
| Employer health care contribution | 1.6% | 2.2% | 1.9% | 0.9% |
| Training (internal, external, certifications, CPE, etc.) | 0.8% | 1.1% | 0.8% | 0.9% |
| Life insurance packages | 0.5% | 0.1% | 0.5% | 0.5% |
| Vacation/PTO days | 0.4% | 0.4% | 0.3% | 0.4% |
| 401(K) match | 0.3% | 0.2% | 0.4% | 0.6% |
| Tuition reimbursement | 0.3% | -0.1% | 0.3% | 0.4% |
| Bonus pools | 0.3% | 0.1% | 0.2% | -0.7% |
| Company vehicle programs | 0.1% | -0.4% | 0.1% | 0.2% |

* Calculated as increase/decrease >10% as 12.5%, mid-point of all other ranges

Suppliers budgeted next year's wage growth at 2.6% and 2.3% for hourly and salary employees, respectively. Health care contribution increased at a slower rate than last year.

# Career Path and Succession Planning Q3 2025

What types of programs have you implemented or are planning to implement for career path and succession planning amongst your workforce?

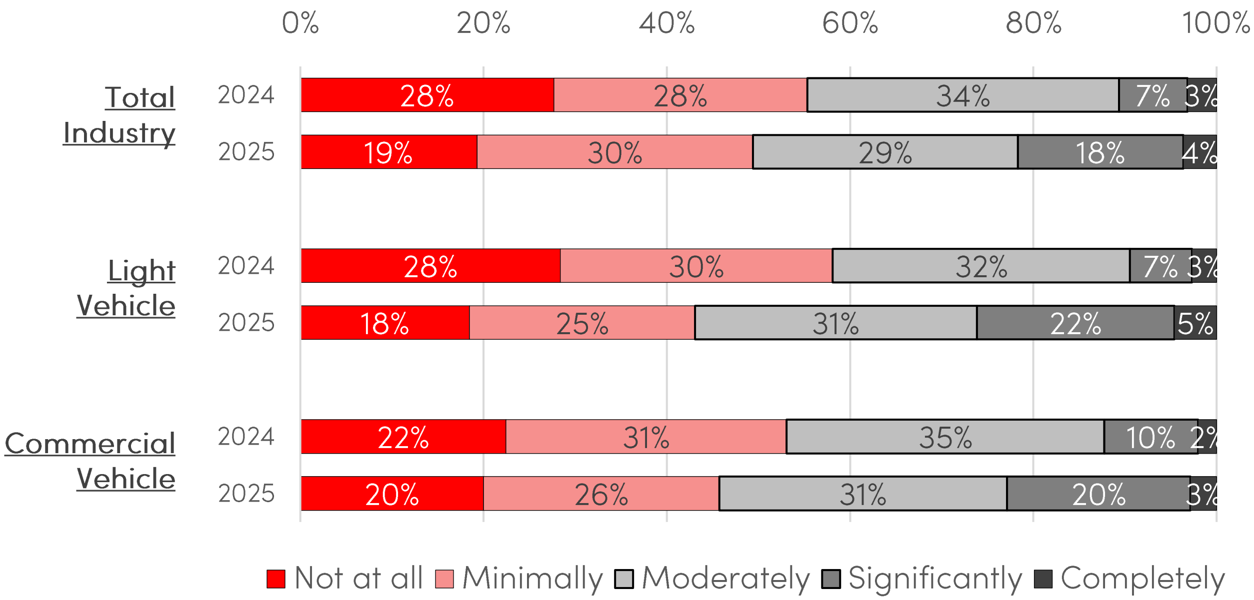



| | LV | | CV | |
|---|---|---|---|---|
| | % Imp. | % Plan | % Imp. | % Plan |
| Training | 84% | 6% | 89% | 6% |
| Individual Development Plans | 78% | 11% | 60% | 23% |
| Leveraging Existing Plans | 69% | 7% | 64% | 15% |
| Internal Promotion Focus | 71% | 12% | 69% | 14% |
| Tuition Reimbursement | 68% | 3% | 57% | 9% |
| High Performing Candidate Focus | 55% | 18% | 41% | 29% |
| Mentorship Programs | 54% | 22% | 54% | 23% |
| External Talent Focus | 43% | 17% | 51% | 11% |
| Standardized Formal Development Plans | 42% | 28% | 29% | 34% |
| Increased Compensation | 35% | 14% | 32% | 18% |
| Cross-functional Job Rotation | 34% | 17% | 35% | 35% |
| Inclusion Programs | 34% | 11% | 24% | 18% |
| International Assignments | 19% | 10% | 18% | 21% |

Key themes for career path and succession planning prioritize developing employees internally through training and tuition reimbursement, while focusing on high performing candidates and promoting internally.

# Inclusive Talent Strategy
# Q3 2025

To what extent have you integrated Inclusion into your talent strategy?




Comments (Selected):

- We hire based on needs and available talent to fill open roles.
- We recognize the importance of being inclusive and are, but more from a normal morality standpoint along with results vs setting limits and standards and specific policy. Example, we have a diverse culture so make sure that food events are appropriate for different cultures.
- It's embedded in the company's core values from the start
- Already maintain a diverse workforce that values everyone's input and maximized delegation of authority.
- Strong focus to hire diverse candidates who meet required qualifications.

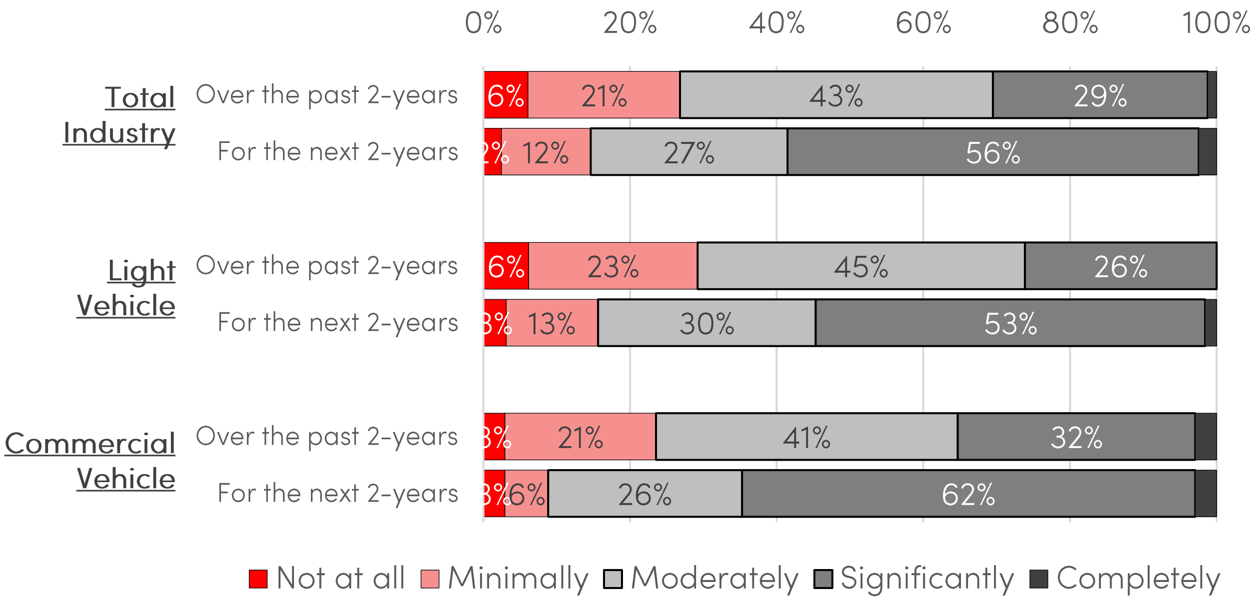
Over half of suppliers feel they have at least moderately integrated DE&I into their talent strategy, improving 7 percentage points from last year.



mema. Original Equipment Suppliers Deloitte.

# North American Automation Integration Q3 2025

## To what extent have you integrated Automation into your North American operations?



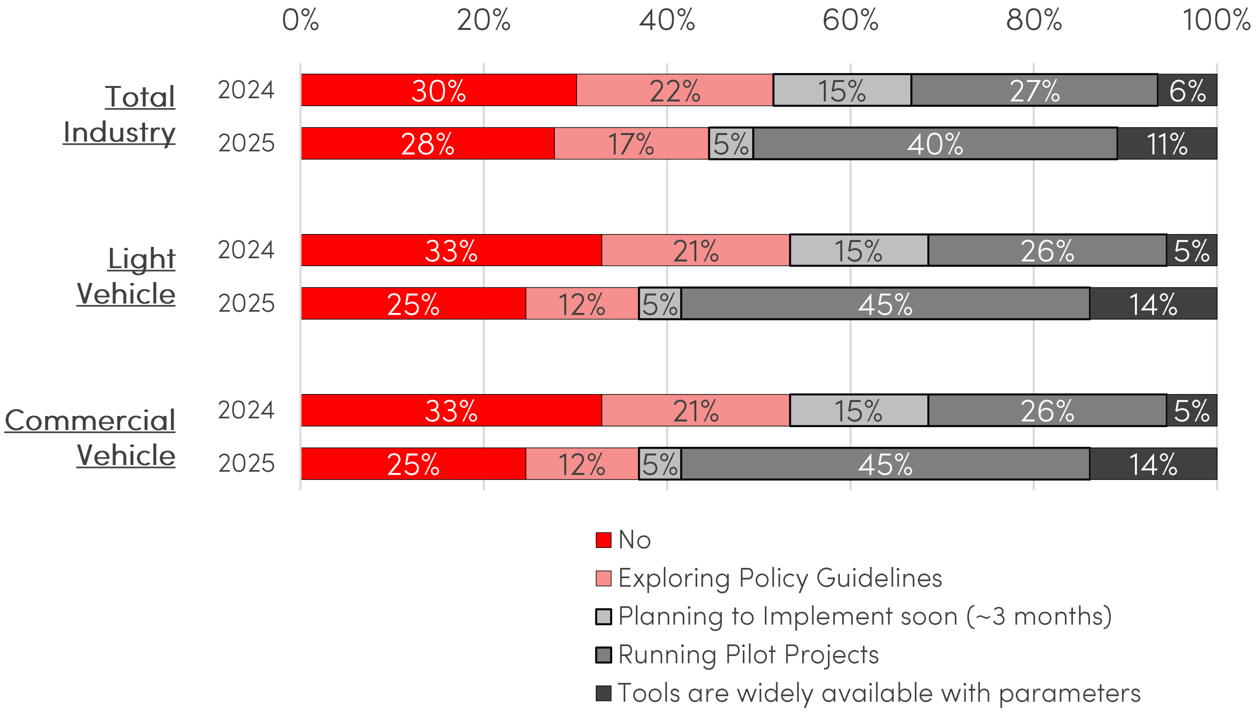

Comments (Selected):

- We are elevating our efforts to automate indirect processes through BI, AI, and other tools that are available.
- We do not believe fully autonomous machines are optimal. Of course, we use automation significantly, but we find the newest technologies better at enabling higher human performance.
- Automation requires production volumes that validate its integration.
- As old programs balance out, new programs will be much more automated.
- Taking advantages for the changing technical landscape will help our operations with the next step in productivity.

73% of suppliers have at least moderately integrated Automation into their North American operations and plan to become increasingly automated over the next two years.

# North American Artificial Intelligence Integration Q3 2025

Does your organization currently use AI productivity tools such as Chat GPT, MS Co-Pilot, fireflies or others to create content, document meetings and support workflows?

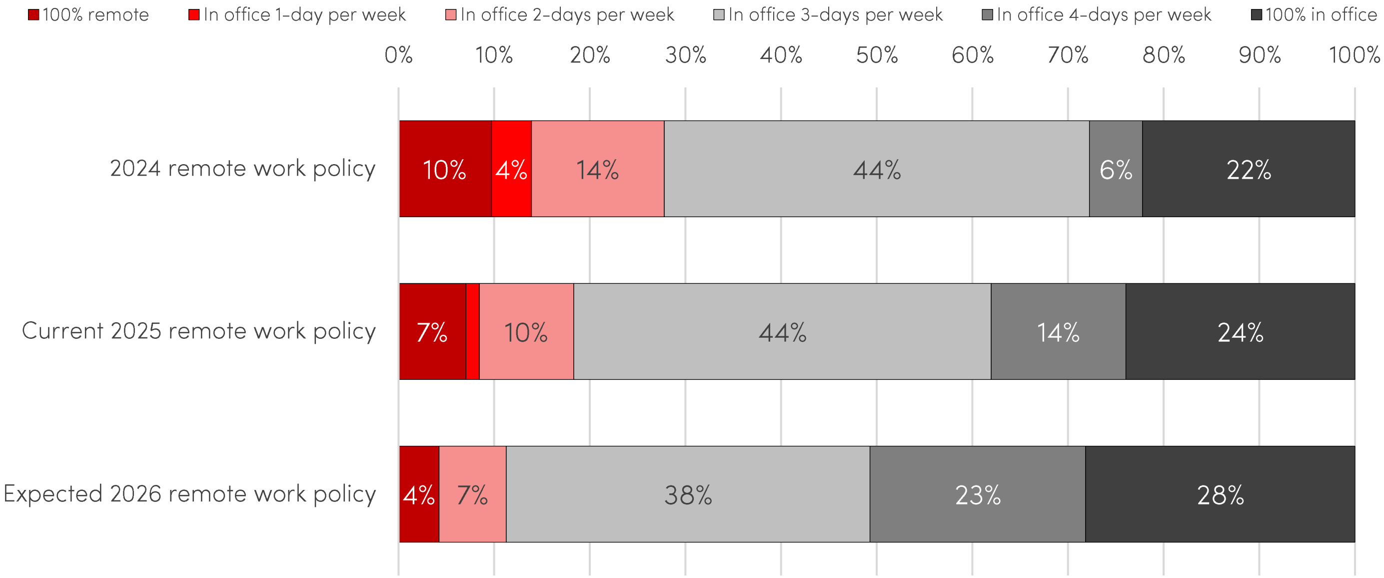



Comments (Selected):

- The use of AI in roles such as sales and purchasing where we can eliminate time taken to create reports from collected data.
- HR examples would be Co-Pilot and Data Analytics Projects.
- Microsoft CoPilot for meeting minutes/transcripts
- Preventive maintenance, quality control and planning areas
- More on the SG&A side of the business using AI BOTS to supplement employee productivity, especially for data-heavy roles. Major push by CEO to incorporate AI.
- AI Agents for HR questions Managing routine tasks

# North American Remote Work Policy Q3 2025

## What is your company's past, current and expected remote work policy?




**Average days per week in office**

| | Total Industry | Light Vehicle | Commercial Vehicle |
|---|---|---|---|
| 2024 remote work policy | 3.0 | 2.8 | 3.0 |
| Current 2025 remote work policy | 3.3 | 3.2 | 3.3 |
| Expected 2026 remote work policy | 3.6 | 3.5 | 3.6 |

Suppliers' remote work policy is expected to grow to 3.6 days per week in office, next year, from 3.0 days in 2024, on average. The most common policy is still 3 days per week.

# MEMA OE Vehicle Supplier Barometer: Q3 2025 - Appendix

MEMA OE Vehicle Supplier Barometer is a survey of the top executives of MEMA regular member companies. The MEMA OE Automotive Supplier Barometer takes the pulse of the suppliers' twelve-month business sentiment. In addition, it provides a snapshot of the industry commercial issues, business environment and business strategies that influence the supplier industry. mema.org

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## Survey Methodology

- Data collected August 25 – September 9 via invitation to online survey.
- Executives of MEMA supplier companies.
- 73 complete survey responses were received, with 96 responses total.

The information and opinions contained in this report are for general information purposes. Comments are edited only for spelling and may contain grammatical errors due to their verbatim nature. Responses to this survey are confidential. Therefore, only aggregated results will be reported, and individual responses will not be released or shared.

Antitrust Statement:
Respondents/participants should not contact competitors to discuss responses, or to discuss the issues dealt with in the survey. It is an absolute imperative to consult legal counsel about any contacts with competitors. All pricing and other terms of sale decisions and negotiating strategies should be handled on an individual company basis.

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