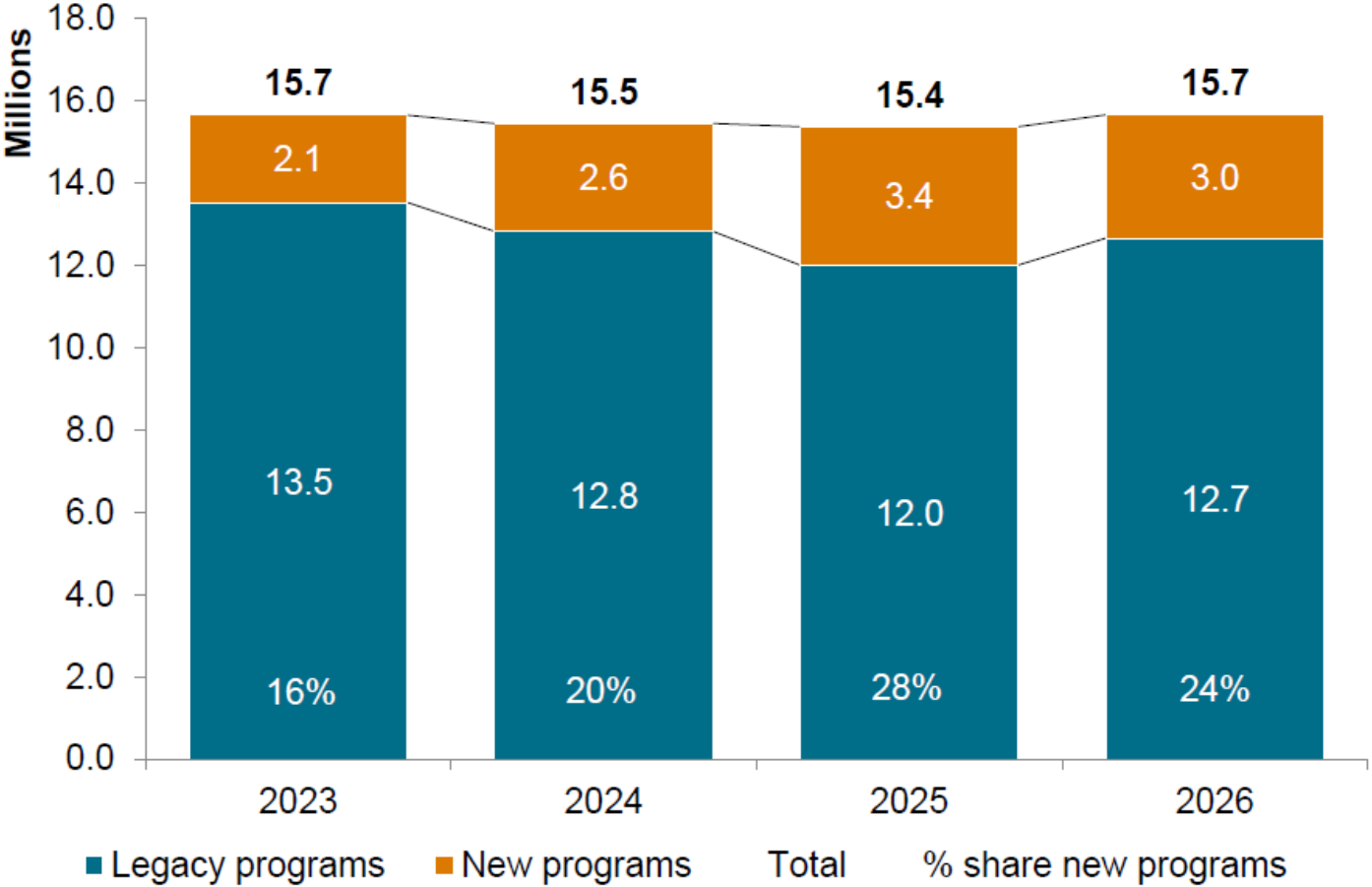


# North America Production Outlook

## North America light-vehicle production



### Outlook – 2025

- Inventory correction year
  - Detroit 3 centered
- Re-engaged to market fundamentals
  - Quality versus quantity
- Launch versus legacy
  - 53 new programs driving 3.4 million units
  - One-time inventory stocking function
  - Legacy decline 6.4% to 12.0 million units

### Outlook – 2026

- Align to demand after correction
- Program delays and cancellations
- Supply chain risks re-emerge

Source: S&P Global Mobility, Sept. 2024

# MEMA OE Supplier Barometer: Innovation Opportunities

How much of an opportunity does your company view the following areas of innovation?

