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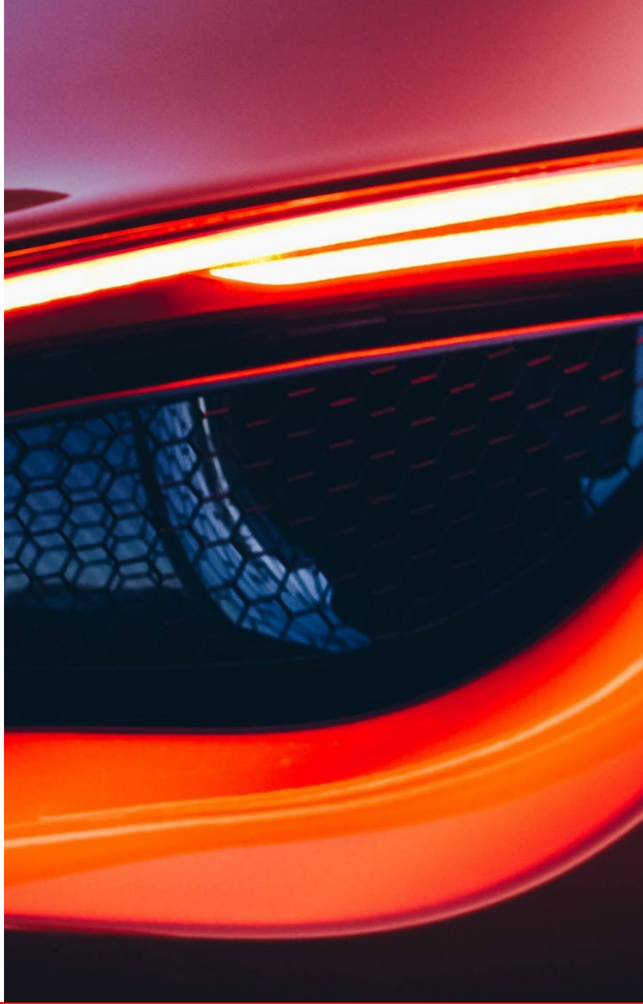
Deloitte.

MEMA OE Suppliers Vehicle Supplier Barometer Q4 2025

Supply Chain, Globalization & Sustainability

January 29, 2026



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MEMA OE Supplier Barometer: Executive Summary

Supplier Barometer Index (SBI)
Q4 SBI Score = 44;
up from Q3 level of 39

Sentiment for the fourth quarter of 2025 continues to reflect industry pressures, for the fifteenth straight quarter of building pessimism. The twelve-month business outlook remains pessimistic, on net, across firms of all sizes. However, there was sequential improvement towards the point of neutrality, and that momentum is shared across most firm sizes. Commercial vehicle suppliers have a nearly identical sentiment towards next year in comparison to their light vehicle counterparts, a positive signal after a very difficult year.

Changes in government trade policies remain as the greatest threat to the industry over the coming 12-months. Risk associated with production shutdowns and the inability to fulfill customer volumes grew significantly from prior quarter.

Concerns of poor sales of vehicles in programs supplied remain elevated but continued to show improvement from prior quarter.

While profitability and production remain down on both a one month and year-over-year basis, new orders and the backlog of orders are showing some positive signals. Cost increases have slowed from a month ago.

Automotive suppliers overwhelmingly view localization, reshoring, and reduced China exposure as their greatest opportunities, driven by trade policy, supply chain risk, and OEM sourcing shifts.

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MEMA OE Supplier Barometer: Executive Summary

Suppliers face renewed supplier distress brought on by weakening financial metrics arising from tariff pressure, and while the percentage of direct material suppliers on a "watch" list rose only 50 bps from 2024, it ends a 3-year streak of improvement.

Suppliers see tariffs and inaccurate customer release schedules as the biggest supply chain risk to meeting their customer volume requirements.

The most concerning system area for sourcing is semiconductors, followed by electrical/electronics and EV propulsion systems.

Over the past year, dual or multiple sourcing for components increased on net from supplier customers by 41% and down through the supply chain by 51%, with very few suppliers witnessing a decrease in either regard.

The majority of suppliers have at least partial visibility to their supply chain (Tier 1 and 2 only). Tier 2+ suppliers are more likely to have blind spots in comparison.

While the majority of suppliers feel that their visibility into their supply chain is at least in-line or exceeding their customer demands a non insignificant proportion feel they are falling short.

Suppliers biggest challenges to maintaining accurate supply chain data is lack of supplier participation and inconsistent data formats and standards.

On average, the percentage of North American produced products made in the U.S. rose 6 ppts. from last year to 73%, while Mexico made products fell 13 ppts to 24%.

Suppliers expect increased U.S. production over the next 5-years, while Mexico remains neutral and Canada declines.

Customers are producing more locally (77% responding at least minimal increase), and suppliers are pursuing increased localization (70% responding at least minimal increase).

However, suppliers are running into labor/talent, cost and capacity issues in their localization efforts, coupled with customers' being unwilling to pay for local content.

While the expectation of company performance related to sustainability slowed in comparison to this year, in remains in strong positive territory.

Suppliers are starting to see positive impacts to their new and existing business from their sustainability programs.

Their largest concerns related to sustainability initiatives are unclear/changing requirements, multiple or conflicting reporting expectations and a lack of resources to fulfill requirements.

The biggest sustainability wins of the past year are focused on carbon emission reductions, renewable energy adoption, sustainability ratings, awards and improvement, and energy efficiency.

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Supplier Outlook

Q4 2025 Vehicle Supplier Barometer

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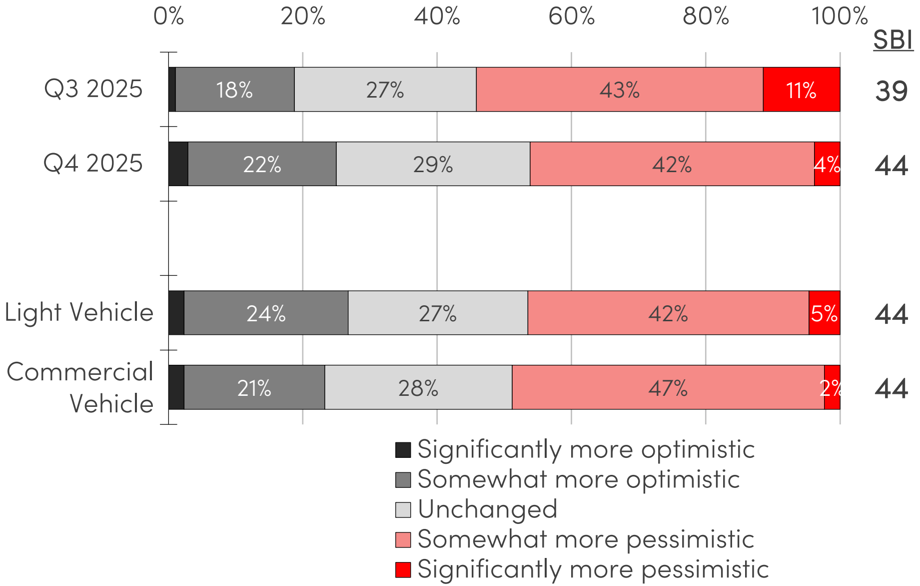
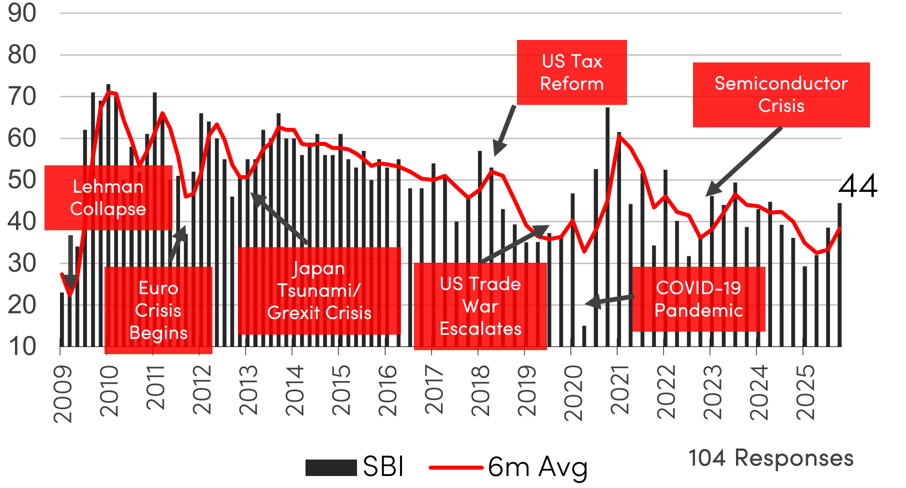
MEMA OE Vehicle Supplier Barometer: Q4 2025 – Results

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

Current Supplier Outlook (Share of Respondents)



Supplier Barometer Index: (SBI and 6m Average)



104 Responses

*Data prior to 2024 Light Vehicle Only

The outlook for Q4 2025 rose five points from the third quarter to 44 but remains in pessimistic territory, and marks fifteen consecutive quarters of building pessimism.

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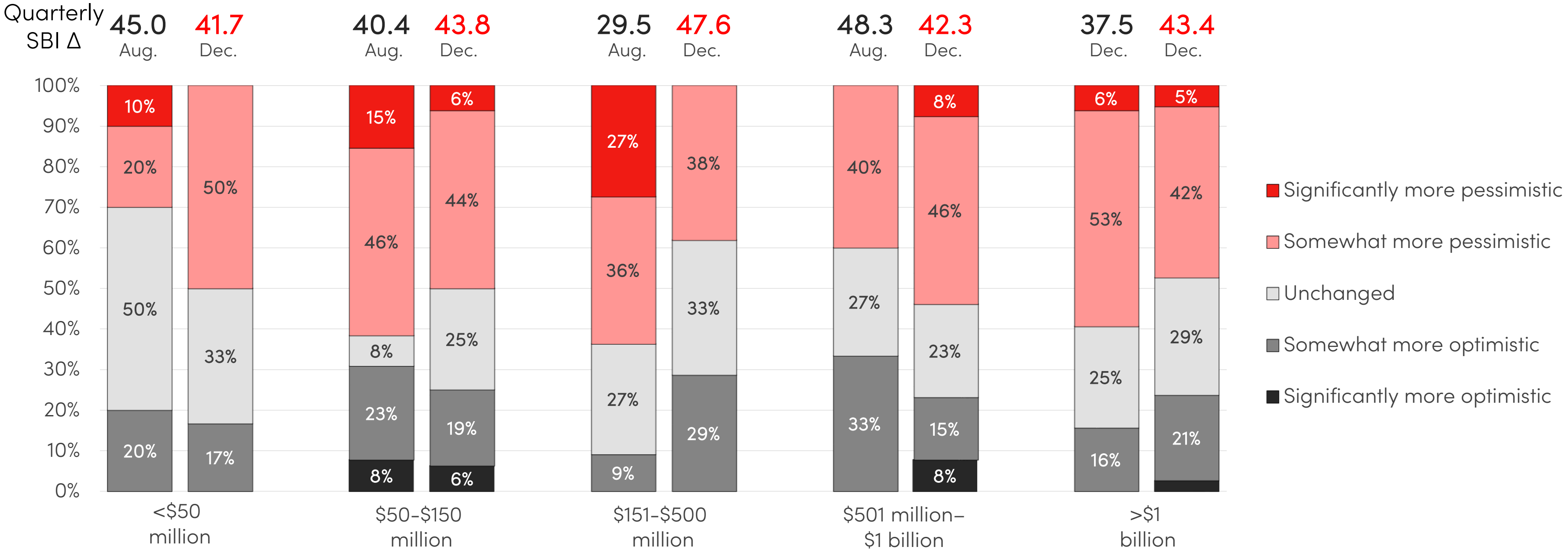
MEMA OE Vehicle Supplier Barometer: Q4 2025 – Results by Revenue

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, all supplier cohorts are within 10 points of neutrality.

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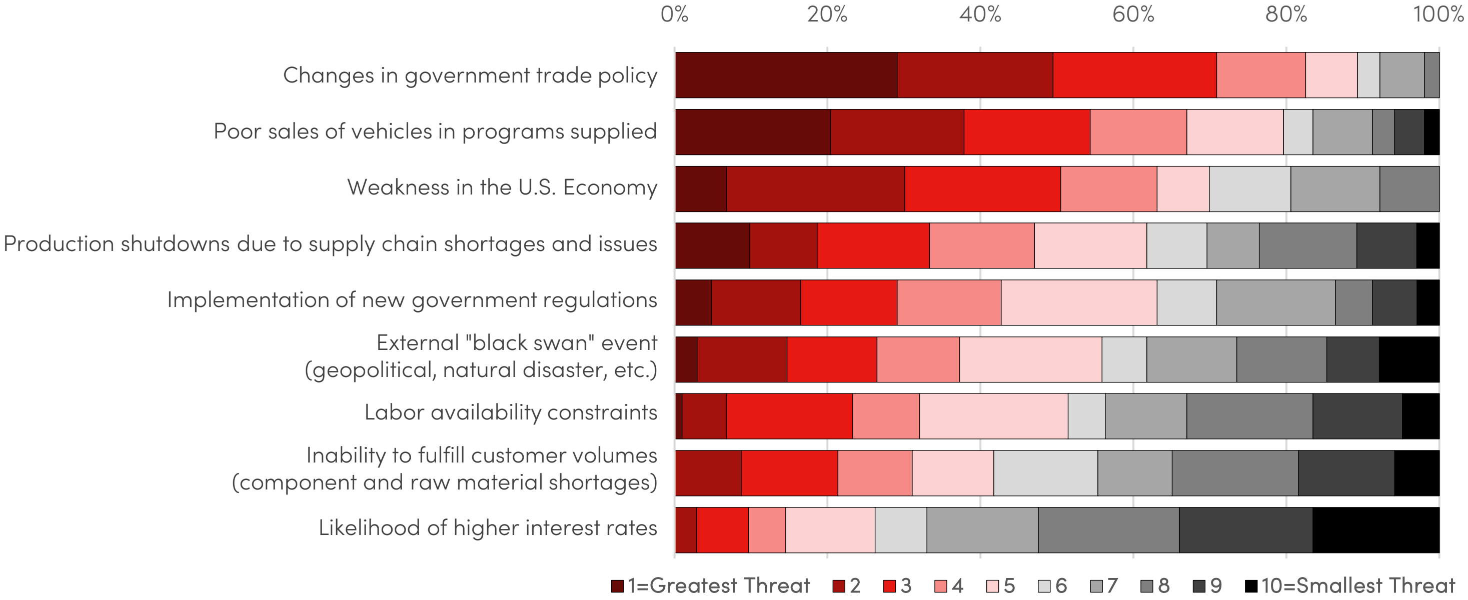
MEMA OE Vehicle Supplier Barometer
Q4 2025 - Industry Threats Results

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



Weighted Average

Threat	Q4 '25	Q3 '25	LV	CV
Changes in government trade policy	2.9	2.6	2.9	2.9
Poor sales of vehicles in programs supplied	3.7	3.5	3.8	4.0
Weakness in the U.S. Economy	4.1	4.1	4.1	4.2
Production shutdowns due to supply chain shortages and issues	5.0	6.5	4.8	5.2
Implementation of new government regulations	5.0	4.7	5.0	4.5
External "black swan" event (geopolitical, natural disaster, etc.)	5.5	6.5	5.5	5.5
Labor availability constraints	5.8	6.3	5.7	6.3
Inability to fulfill customer volumes (component and raw material shortages)	6.0	7.5	6.0	6.2
Likelihood of higher interest rates	7.2	6.9	7.0	7.4

Changes in government trade policies remains as the greatest threat to the industry over the coming 12-months.
Risk associated with production shutdowns and the inability to fulfill customer volumes grew significantly from prior quarter.

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MEMA OE Vehicle Supplier Barometer: Q4 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.
Profitability	37	36	40	41	30	32
New orders	42	46	46	46	33	33
Production	36	38	39	41	33	37
Employment	29	37	33	34	23	24
Supplier Deliveries	42	40	43	44	37	39
Inventories	49	47	51	47	54	45
Customers' Inventories	55	51	58	56	53	47
Costs	91	75	92	88	94	85
Backlog of Orders	47	51	53	53	43	43
Imports	37	40	39	40	31	33
New Export Orders	47	48	50	50	39	40

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

While profitability and production remain down on both a one month and year-over-year basis, new orders and the backlog of orders are showing some positive signals. Costs increases have slowed from a month ago.

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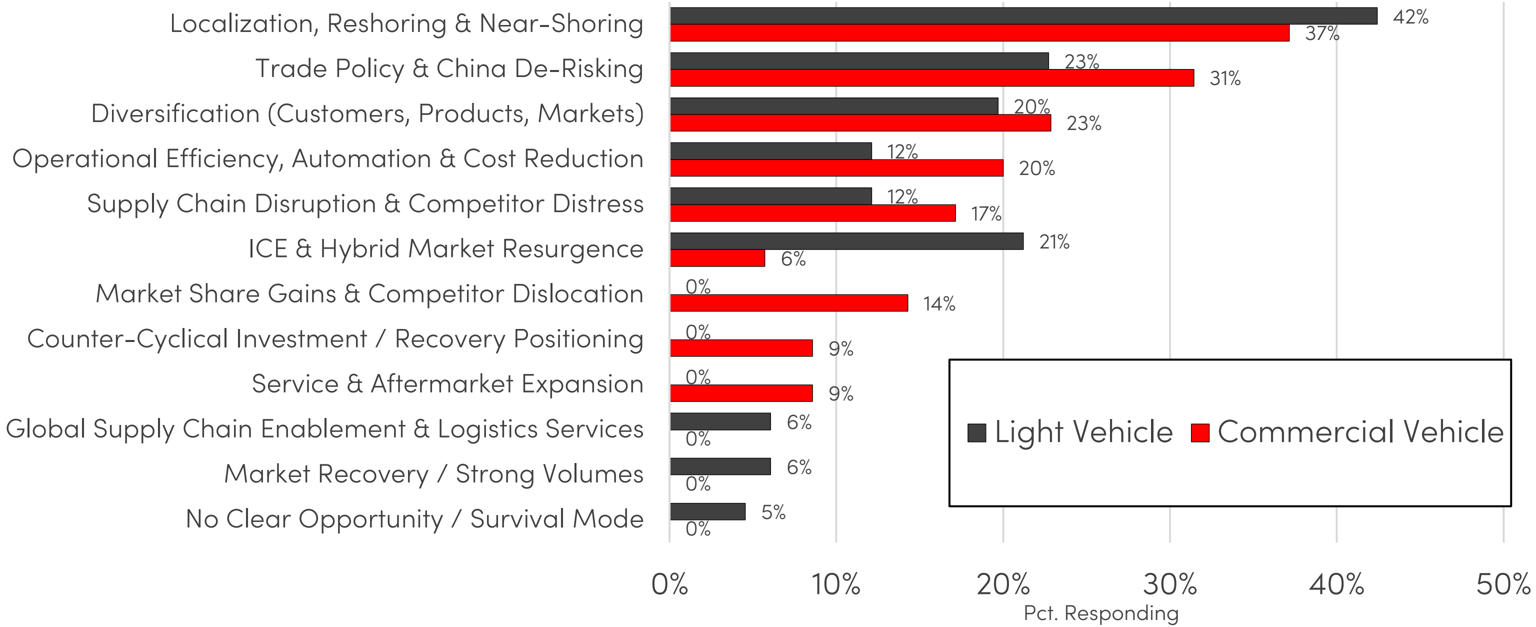
MEMA OE Supplier Barometer: Current Opportunities

Based on the current business environment, what do you believe your biggest opportunities are at the moment?



Automotive suppliers overwhelmingly view localization, reshoring, and reduced China exposure as their greatest opportunity, driven by trade policy, supply chain risk, and OEM sourcing shifts.

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Supply Chain

Q4 2025 Vehicle Supplier Barometer

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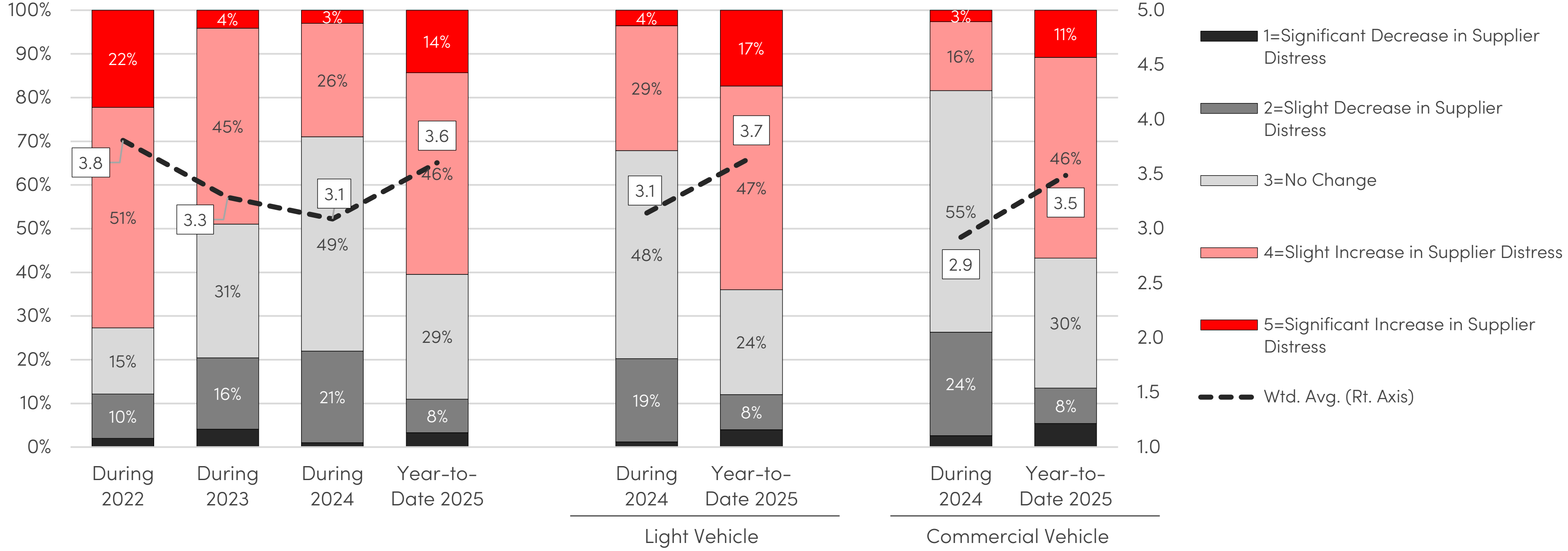
Supply Chain: Sub-tier Supplier Distress

Considering your North American production facilities, over the following periods, have you witnessed an increase in distress within your global supply base?



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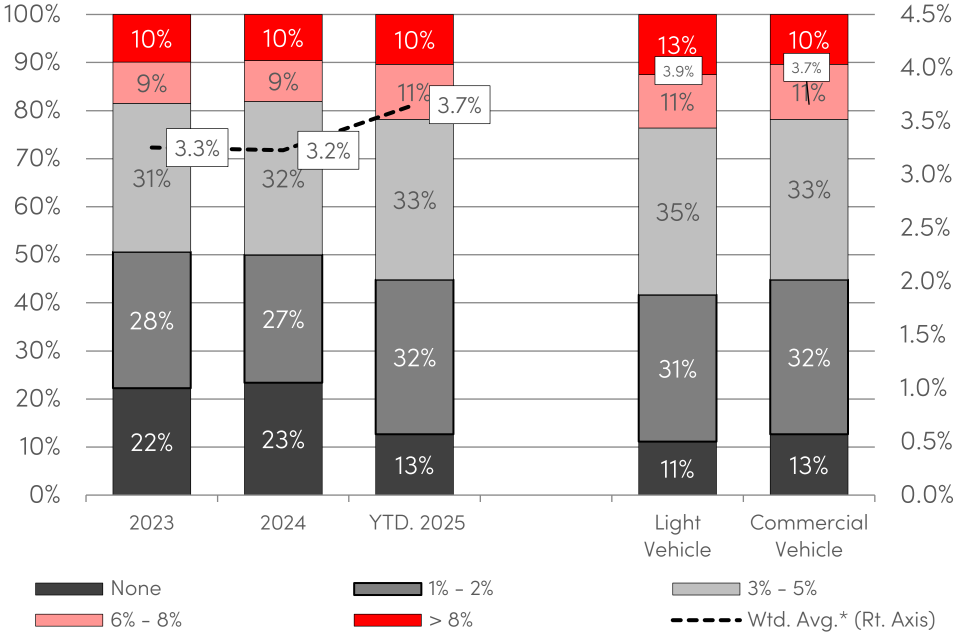
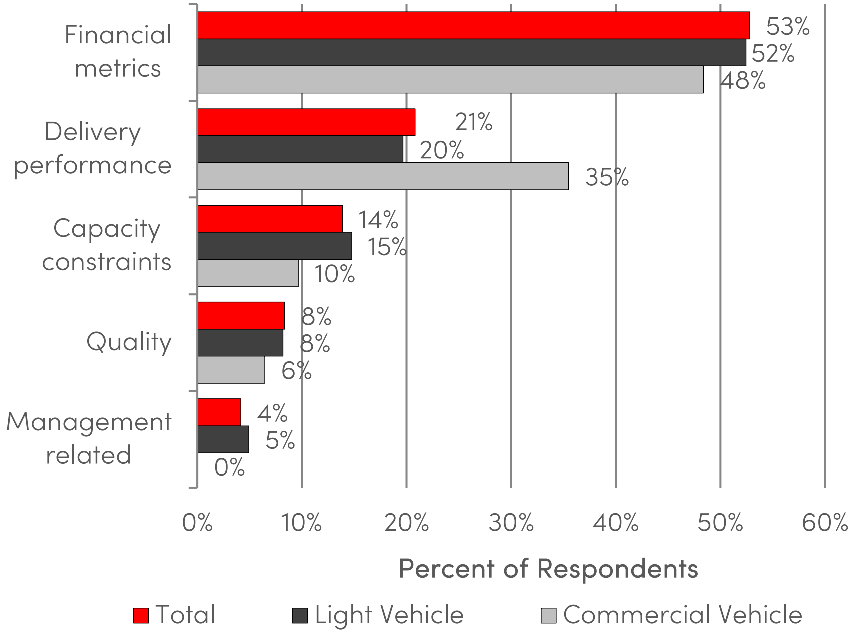
Supply Chain: Direct Supplier Risk

What percent of your global direct material suppliers are currently on your "watch list?"



*Assumes mid-point of each range, greater than 8% equals 10%

What is the primary reason companies are being added to or continuing on the supplier "watch list?"



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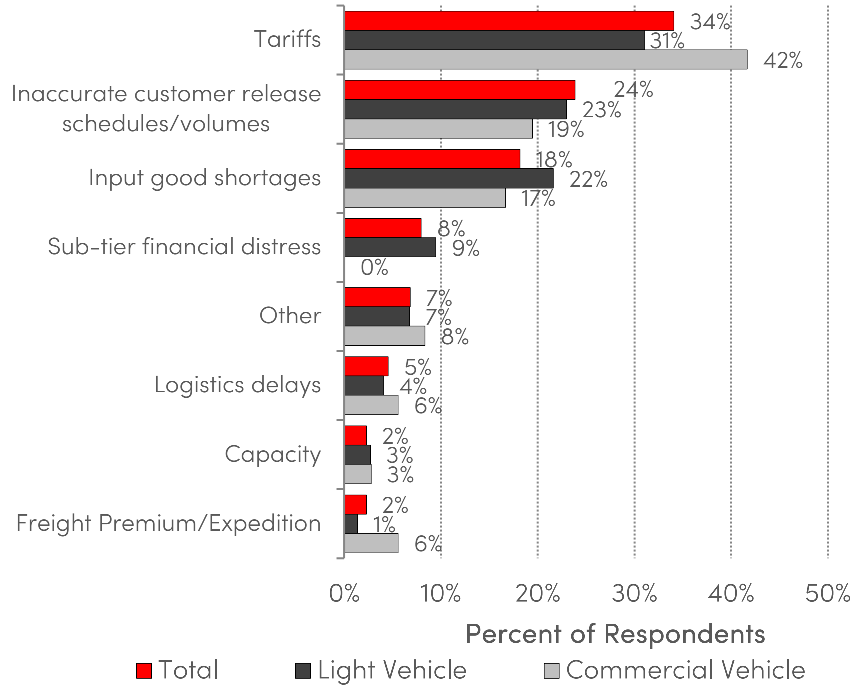
Supply Chain: Supply Chain Risk

What is your greatest supply chain risk in meeting customer production requirements?



Comments:

- The financial distress will be driven by Tariffs, high interest rates, and inaccurate releases by OE causing higher inventories, WIP, etc.
- Despite "agreements" with OEMS for tariff recovery at different levels, [Two OEMS] differ and delay resulting in very little money coming in.
- Tariff Sourcing Rationalization Impacts
- Longer lead times with less variable forecast are required to reduce risk.
- Domestic steel lead times have increased from 8 to 16 weeks
- Tariff pass through costs are a financial risk to us and our customers, but not a supply concern
- N-Tier documentation and OEM recovery inadequate

Other:
- Nexperia/Export Controls (3)
- Regulatory country exclusions
- OEMs not interested in new suppliers
- No issues meeting requirements

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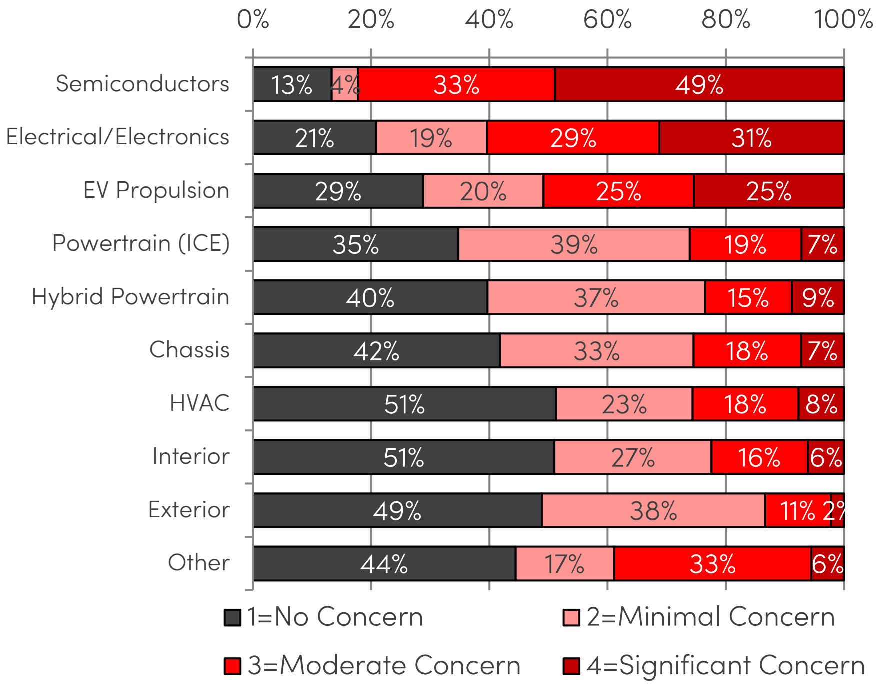
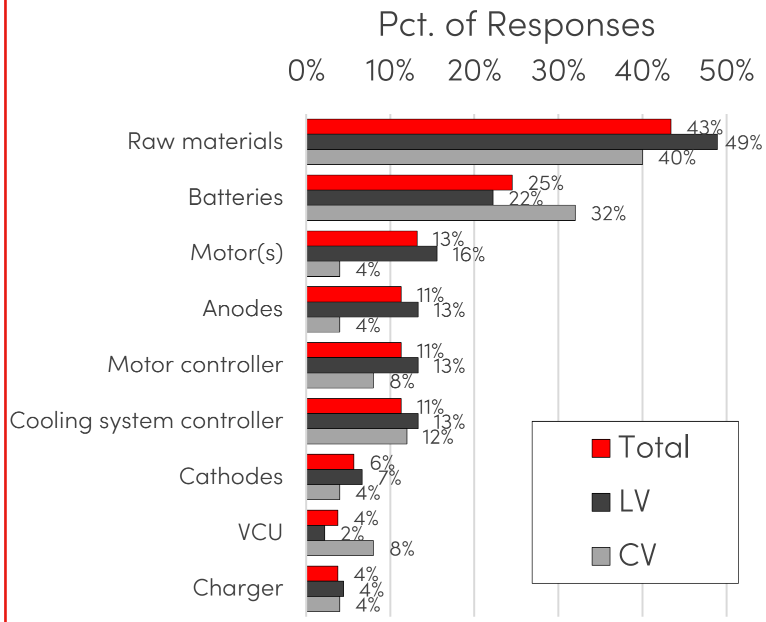
Supply Chain: Sourcing Constraints

Considering the North American marketplace, for each of the following system areas, select your level of concern in having future sourcing constraints to meet customer demand.



	Total	LV	CV
Semiconductors	3.2	3.2	3.2
Electrical/Electronics	2.7	2.8	2.9
EV Propulsion	2.5	2.5	2.6
Powertrain (ICE)	2.0	2.0	2.1
Hybrid Powertrain	1.9	2.0	2.1
Chassis	1.9	1.9	2.0
HVAC	1.8	1.9	1.8
Interior	1.8	1.8	1.5
Exterior	1.7	1.7	1.9
Other	2.0	2.1	1.6

If applicable, which of the following EV propulsion components and/or materials are you concerned in having future sourcing constraints?



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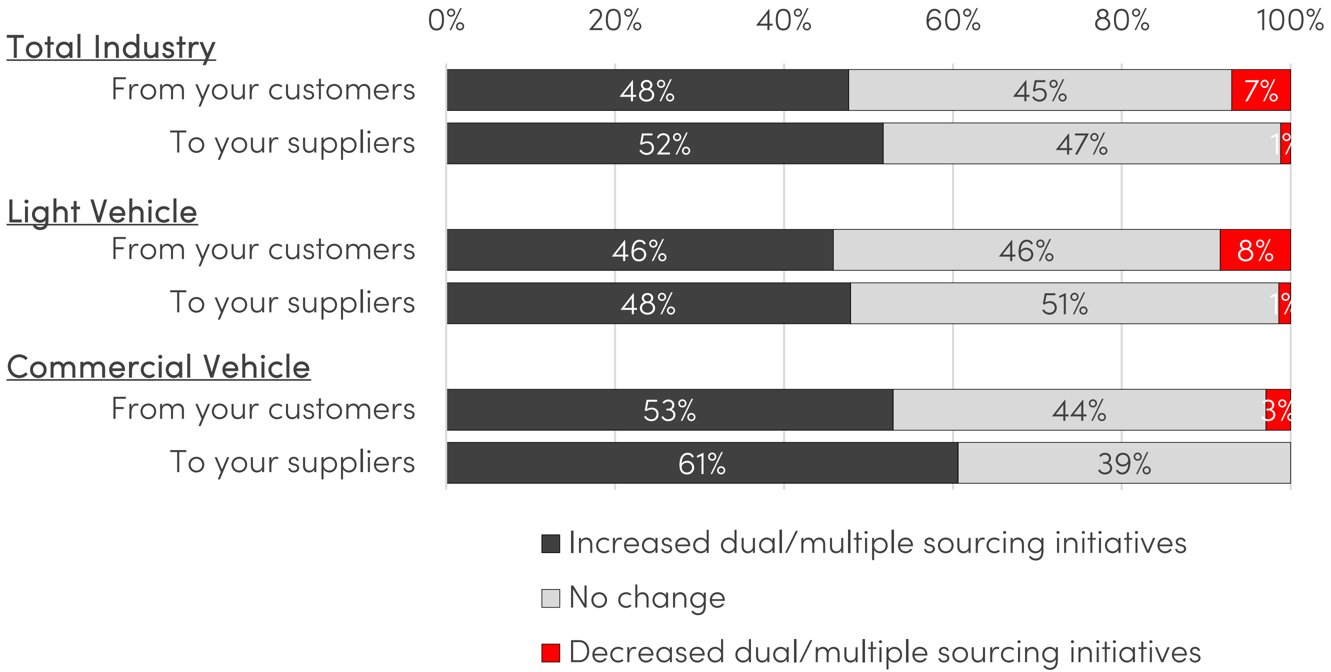
Supply Chain: Dual Sourcing

Over the past year in North America, has your company experienced a change in dual/multiple sourcing initiatives from your customers or implemented dual/multiple sourcing initiatives with your suppliers?



	2025/ 2024	2024/ 2023	2023/ 2022
Total Industry			
From your customers	41%	+28%	
To your suppliers	51%	+38%	
Light Vehicle			
From your customers	38%	+30%	+28%
To your suppliers	46%	+35%	+38%
Commercial Vehicle			
From your customers	50%	+21%	
To your suppliers	61%	+44%	

Link to comments

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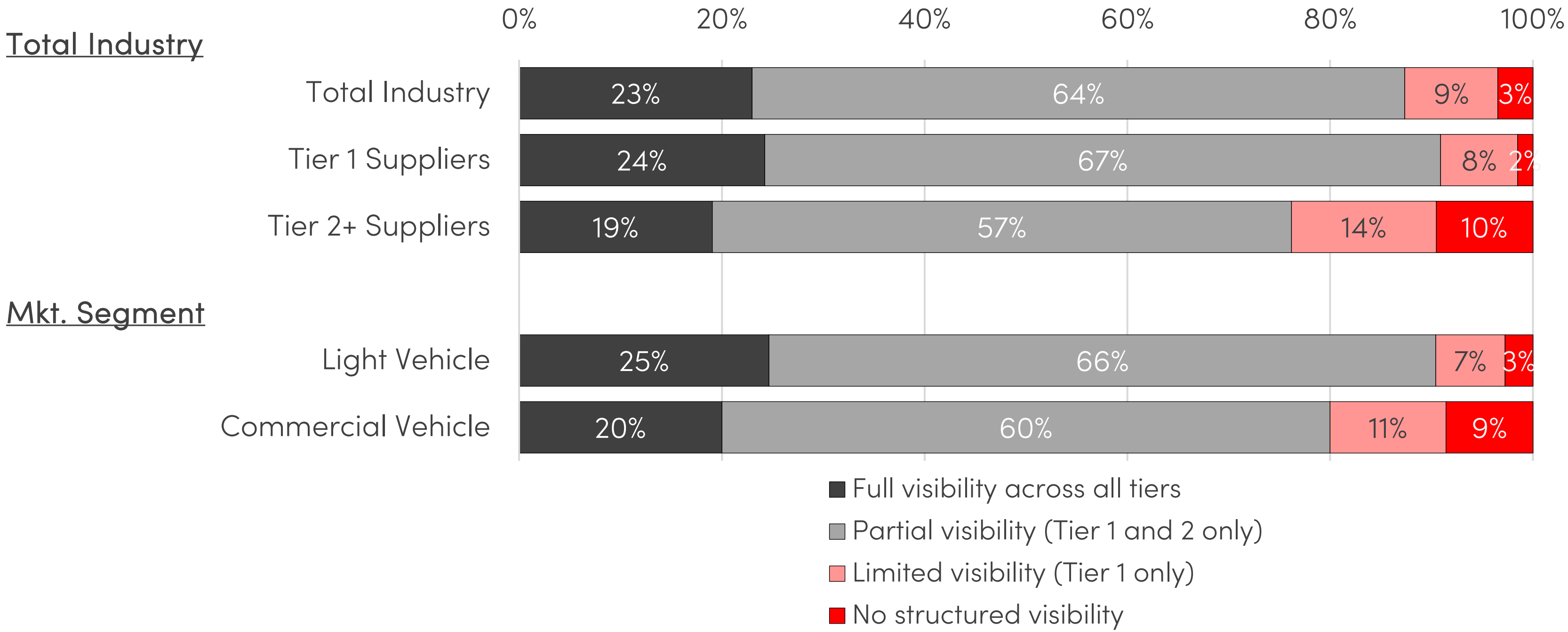
Supply Chain:
Supply Chain Visibility

How would you rate your organization's current level of visibility across all tiers of your supply chain (from Tier 1 to raw material suppliers)?



Link to comments

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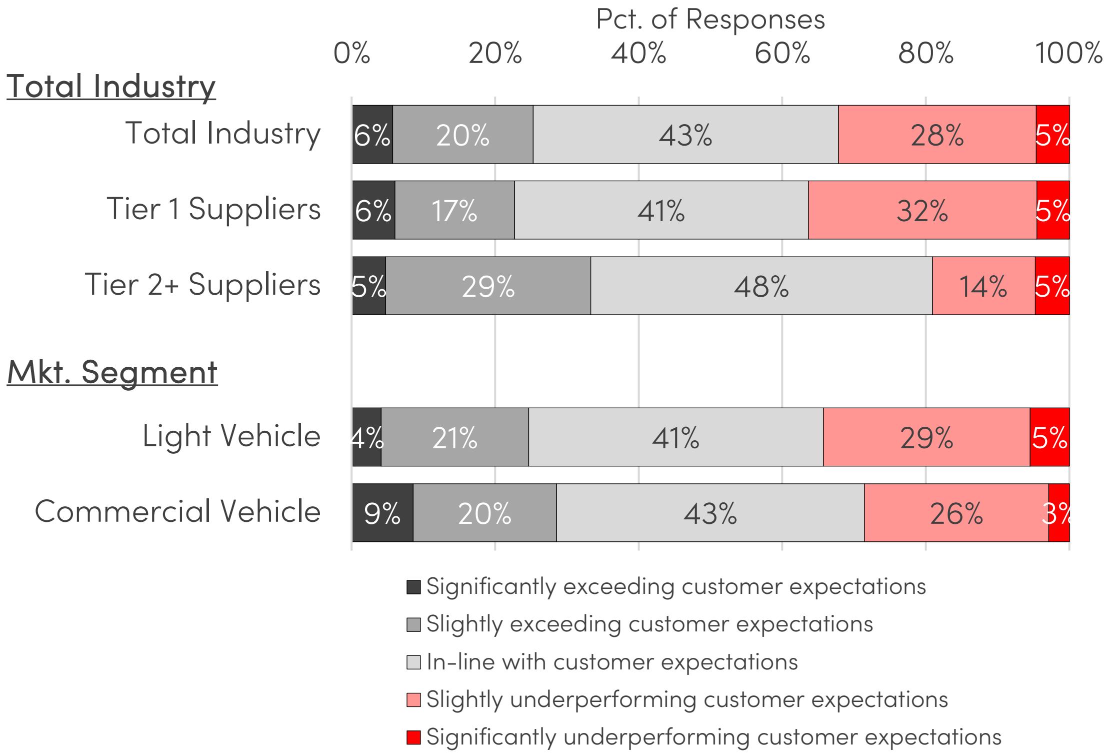
Supply Chain: Supply Chain Visibility

How would you rate your organization's ability to fulfill your customers' demands for visibility of your supply chain?



Exceeding Customer Expectations

- We have maintained and prevented several line down situations over the past 12 months.
- Have prevented several line down events using our BCP playbook over the past 12 months.

In-Line with Customer Expectations

- We have had to step up to this for GM's tier N
- Customers need to standardize on one tool. Each customer uses different tools. Difficult to understand the nuances of each tool.

Underperforming Customer Expectations

- Forced labor down to Raw materials, mining and steel scrap is very though when some suppliers are located in SA, Thailand, etc.
- Customer expectations do not meet reality. They don't have the same expectations for their own suppliers.
- GM asking for a lot with entire Tier N, lower Tiers are not cooperating to provide data and especially not to thorough level
- Customers seeking tier-n visibility, but in many cases, companies have tier 1 or 2 visibility for a variety of reasons including contractual confidentiality agreements that prevent suppliers from disclosing more.

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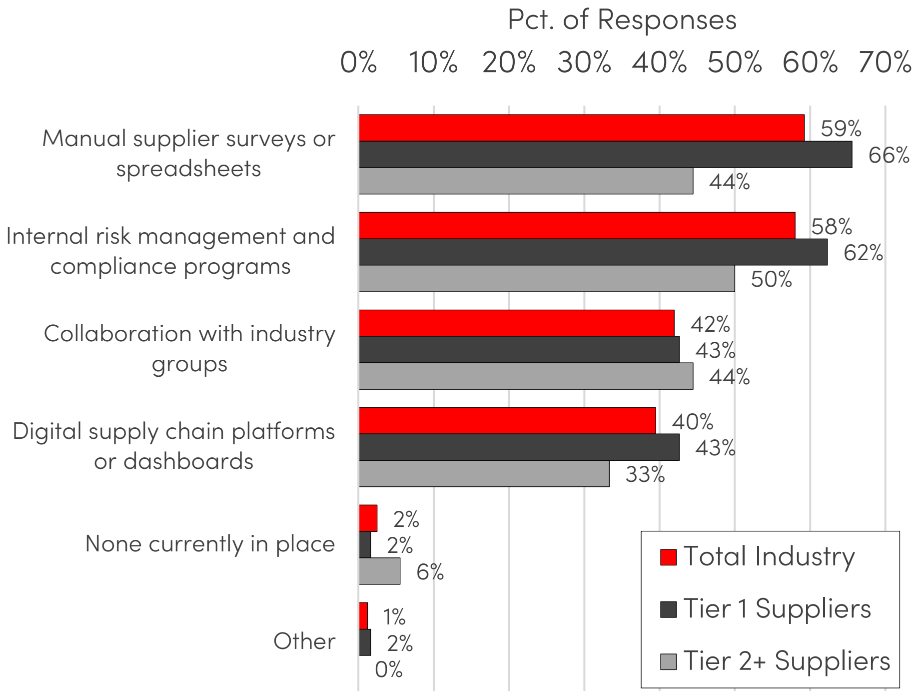
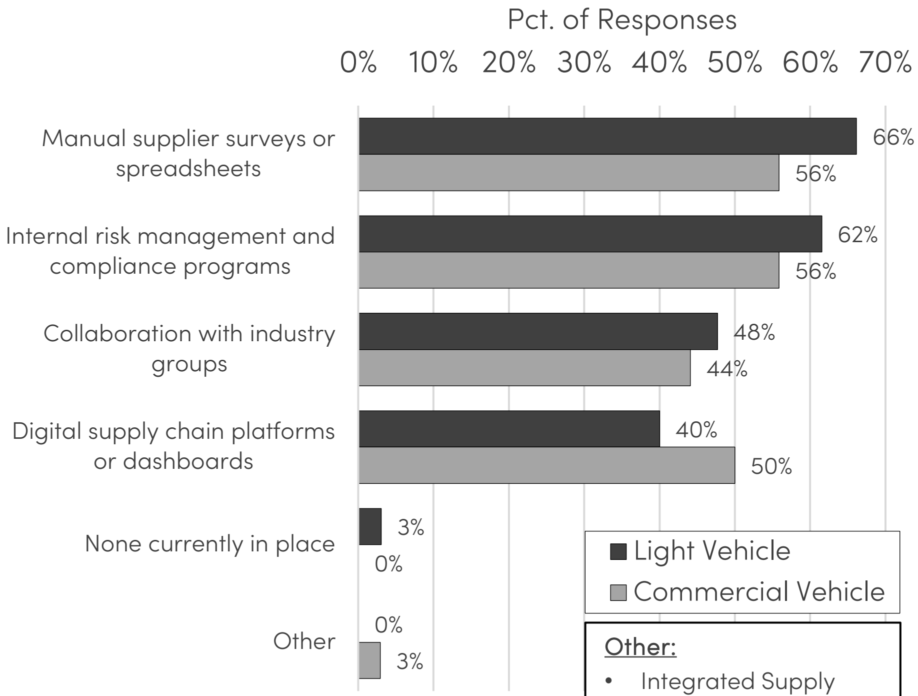
Supply Chain:
Supply Chain Visibility

What internal best practices or tools does your organization currently use to support supply chain mapping and risk identification?





Other:
- Integrated Supply Chain Forecasting

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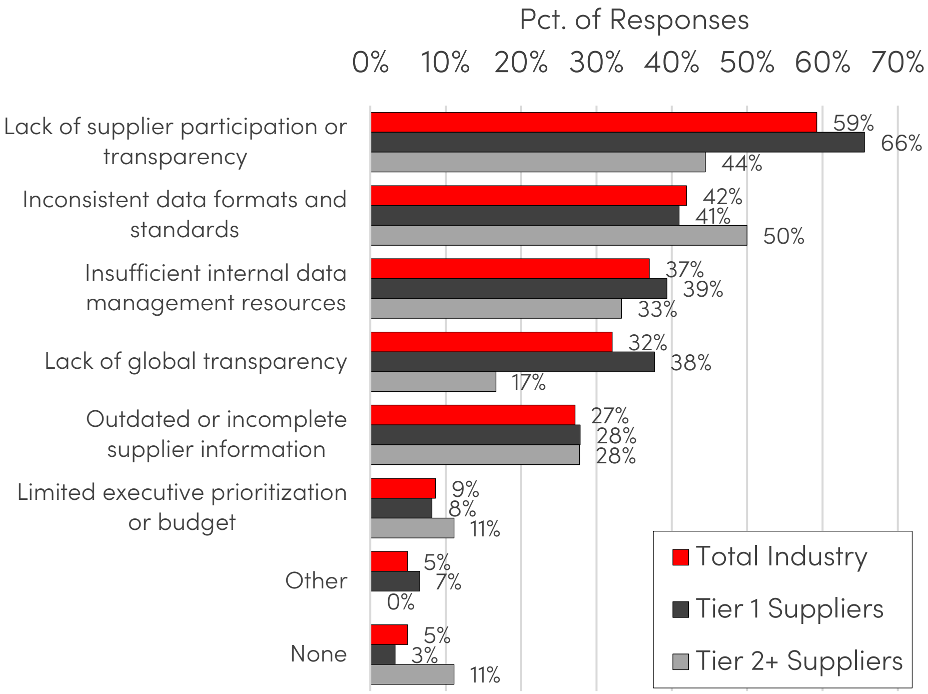
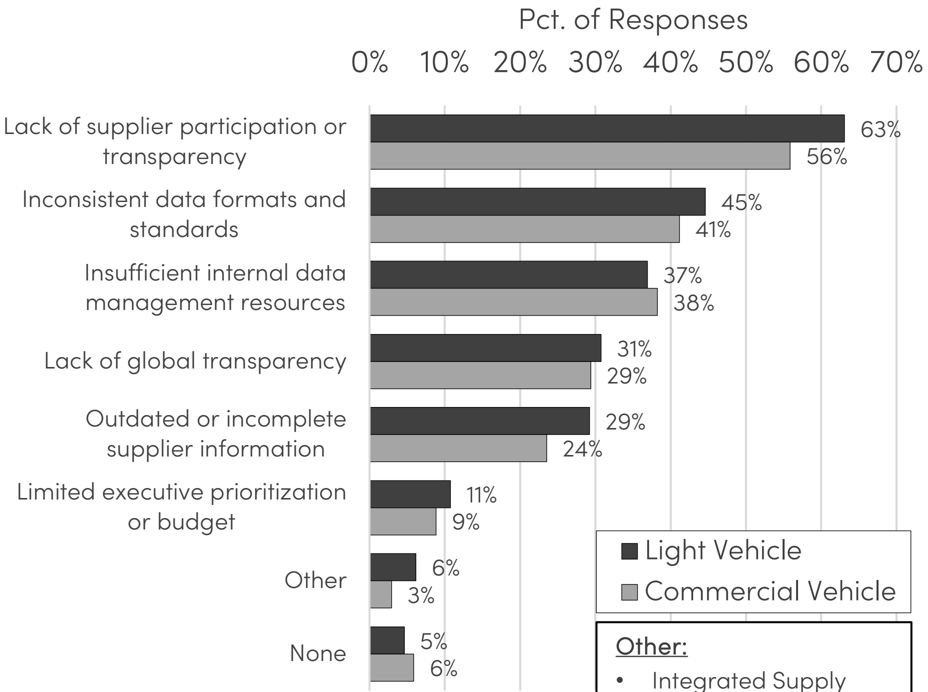
Supply Chain: Supply Chain Visibility

What are the biggest challenges your organization faces in collecting and maintaining accurate supply chain data?





Other:
- Integrated Supply Chain Forecasting

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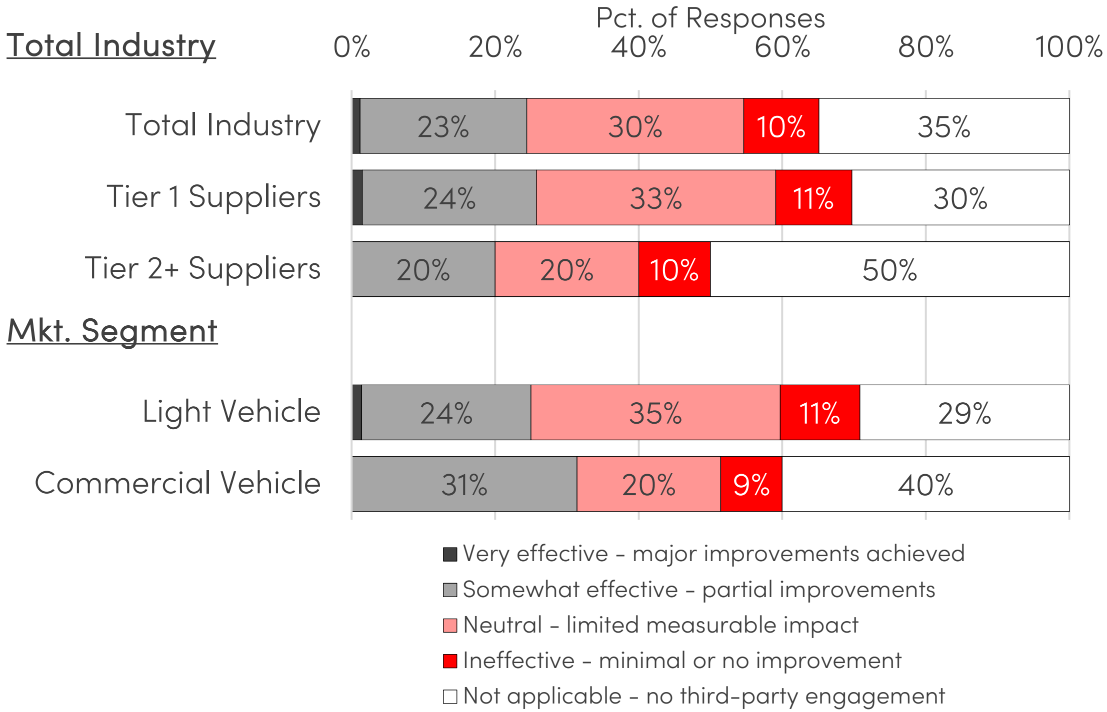
Supply Chain:
Supply Chain Visibility

How effective have third-party data, software, or technology providers been in helping your organization improve supply chain mapping and visibility?



Somewhat effective:

- The needs we have for visibility has increased a lot so there is no ideal or standard definition of needs. Therefore, the IT solutions are still limited. It will take a while for standard software to become robust.
- It has been extraordinarily challenging to obtain and/or integrate all required tiered data to effectively automate 3rd party software.
- It has been very challenging to collect all necessary supply chain mapping data and integrate all relevant internal systems data to automate third party software. There is still a lot of manual maintenance and intervention required.

Ineffective:

- Tool is not effective if we must take the data, and key it into each of our customers tools.

Not applicable:

- Can't afford these services

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Globalization

Q4 2025 Vehicle Supplier Barometer

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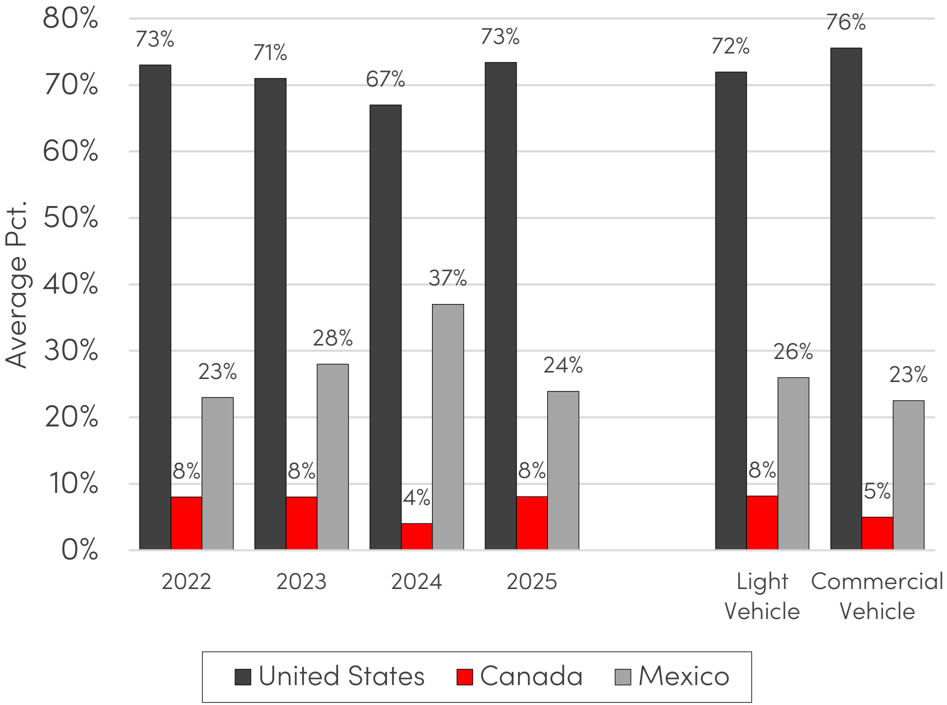
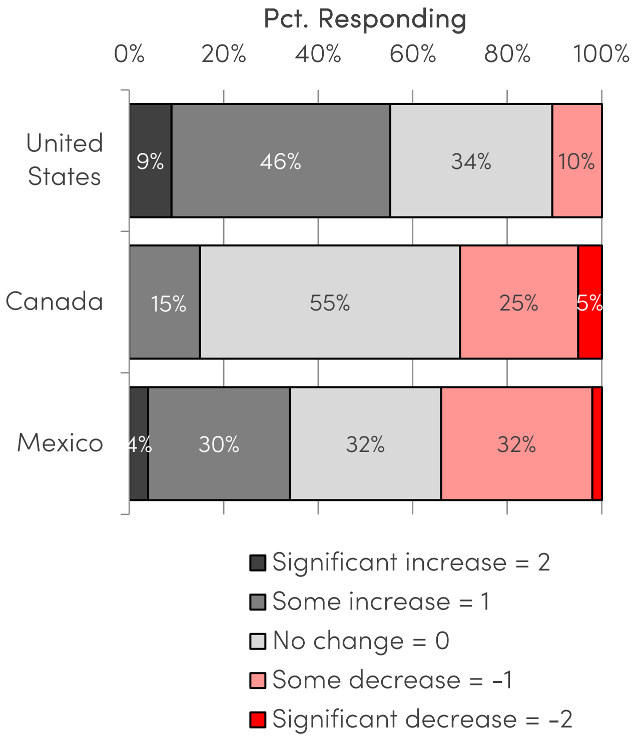
Globalization: North American Production Allocation & Planning

For your products produced in North America, identify the percent manufactured in each of the following countries.



How do you expect that these percentages will change over the next 5 years?



Weighted Average

	Total	LV	CV
United States	0.54	0.55	0.40
Canada	-0.20	-0.23	-0.24
Mexico	0.02	-0.02	0.05

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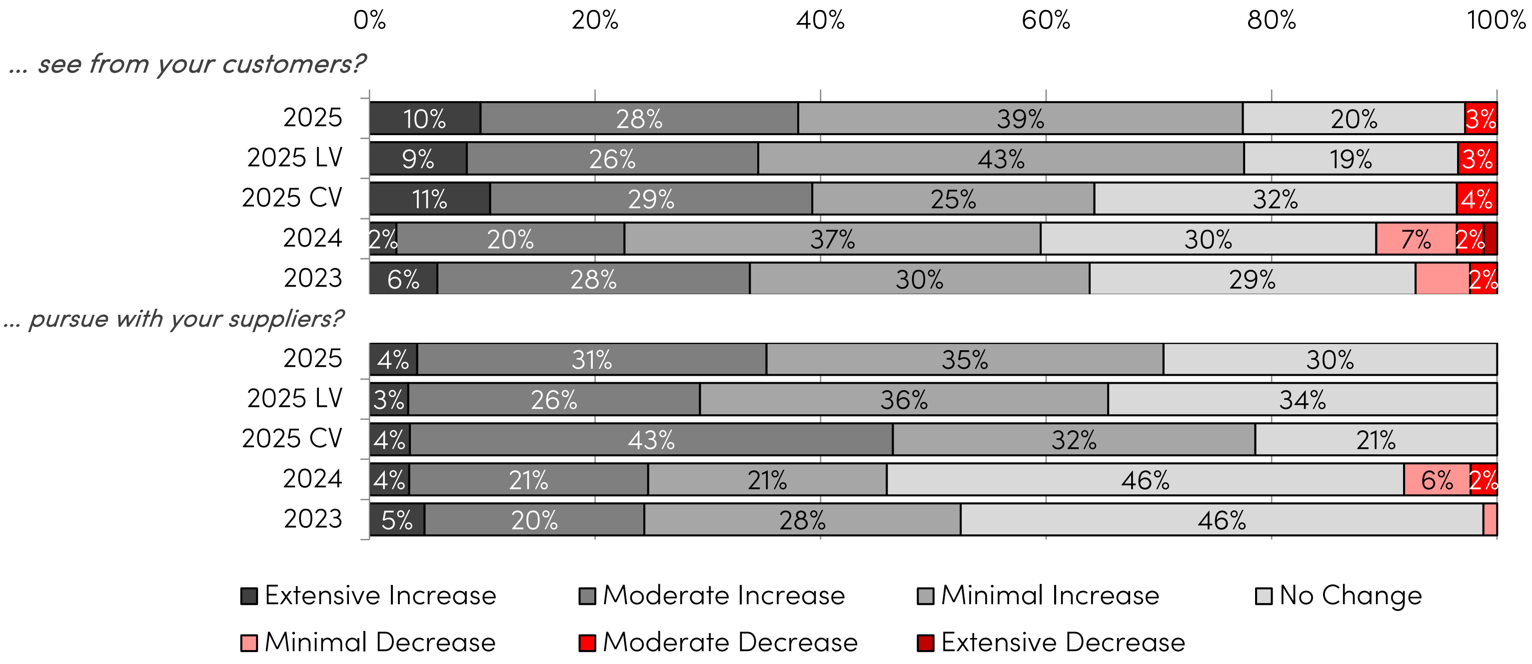
Globalization: Localization Efforts

Over the past year, what level of manufacturing localization activity/effort did you…



Globalization: Localization Efforts

Has your company experienced any challenges to its North American localization efforts?

Light Vehicle

- No / NA (5)
- Yes, mainly availability of technology/ materials (eg magnets) or competitive pricing.
- Trying to increase localization
- Extra quoting with no payoff.
- Yes, customer commitments to the requested investments
- Customer not willing to pay premium to localize.
- As mentioned, strong efforts to tariff mitigation, but we have found very few domestic solutions.
- Capacity limitations at suppliers, lack of capable suppliers, lack of the necessary raw material inputs in North America
- Yes, raw materials not available in NA.
- Localization efforts are challenged by capacity availability. Suppliers have limited available capacity, additional capacity is under consideration however the future regulatory changes remain unclear. The lack of clarity has caused supplier hesitancy to invest in additional capacity.
- USMCA, IEEPA and Tariffs have made it difficult to consider future investment
- yes. Lack of qualified suppliers (i.e. electrical motors)
- Yes, cost pressures as local suppliers take advantage to price in competition tariff burden
- Lack of capable suppliers in some commodities.
- Yes, the customers still want China pricing.
- Cost challenges - our customers are asking for local world class USA manufacturing at China prices
- Yes, mostly on lack of incentives, unstable tariff regulations, lack of skilled employees
- Finding identical products/performance.
- Higher costs locally than offshore supply, even when tariffs are included

Light Vehicle

- Pricing competitiveness
- Yes, price and willingness of customers to accept any price variance.
- Our 5 yr outlook has shown increased production in the USA away from Mexico starting in 2027
- Not in Automotive to a significant level

Both Light and Commercial Vehicle

- No/NA (5)
- Access to capital (low interest in investments in auto), tariffs on equipment, labor constraints, low inventory of industrial properties/available energy, lack of monetary support from customers, uncertainty around USMCA
- Higher costs than outside.
- Skilled labor shortage Availability of raw materials, components & general production input
- Cost prohibitive, investment long term
- Lead time for new equipment
- High costs and talent, workforce availability.
- Availability of certain raw materials/inputs regionally - either not available at all or not available at the volumes necessary to support production capacity. Cost, labor also factors.

Commercial Vehicle

- No/none (3)
- Availability of capital equipment and/or special materials/components needed produced within North America
- availability of both capabilities and capacity (if capabilities already exist)
- forging capability and capacity in the US
- Cost to re-shore products in the US is still prohibitive. Investments to automate are high and the uncertain environment doesn't encourage the risk taking. Mexico is still a better option for labor intensive manufacturing.

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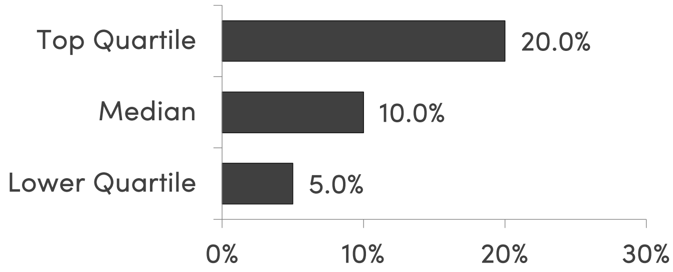
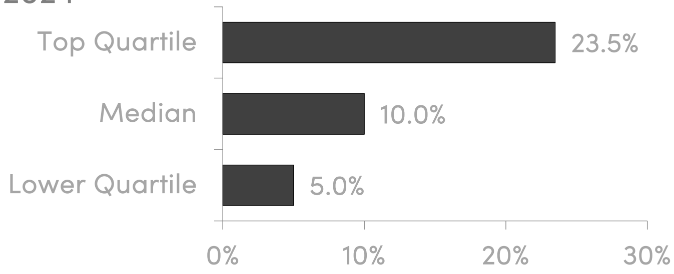
Globalization: U.S. Exports

Estimate the percent of your current U.S. production that is exported outside of the United States.

2025



2024



What is the estimated split of these exports (in percent) to each of the following regions?

2025	Lower Quartile	Median	Upper Quartile	Number of respondent companies exporting to each region
Canada	0%	15%	50%	31
Mexico	20%	44%	85%	41
Europe	0%	0%	6%	20
China	0%	0%	5%	18
Rest of Asia	0%	0%	4%	15
South America	0%	0%	2%	14
MidEast/Africa	0%	0%	0%	2

2024	Lower Quartile	Median	Upper Quartile	Number of respondent companies exporting to each region
Canada	0%	15%	33%	33
Mexico	10%	42%	68%	41
Europe	0%	0%	19%	25
China	0%	0%	8%	22
Rest of Asia	0%	0%	10%	18
South America	0%	0%	7%	20
MidEast/Africa	0%	0%	0%	4

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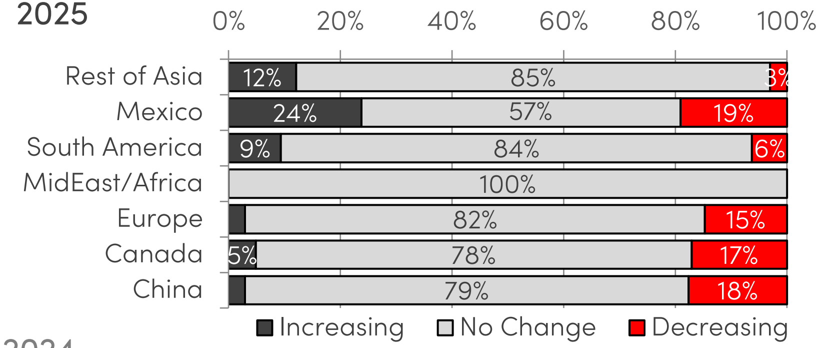
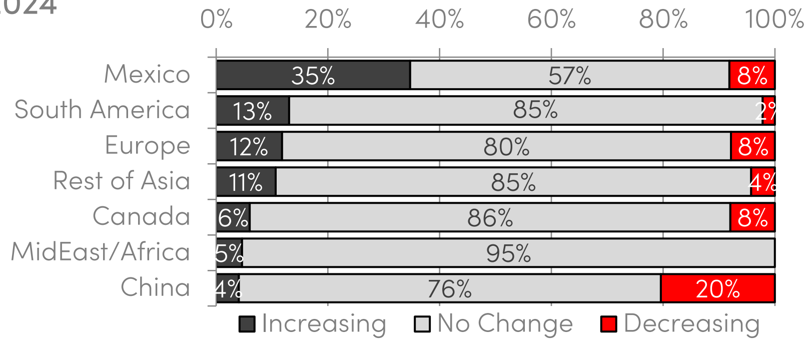
Globalization: U.S. Exports

Estimate the percent of your current U.S. production that is exported outside of the United States.

2025



2024



What major factors drive this regional export plan?	
Canada	• OE's moving production to US • Tariffs • Customer is a part of First Brands and will be losing the business to a customer in the US. • Ship to customer production plants. • Customer Vehicle Production Allocation • Pending US trade policy & outcome from USMCA renewal negotiations
Mexico	• OE's moving production to US • Tariffs • Tariffs in Mexico on Asia supplied items. • Ship to customer production plants. • Customer Vehicle Production Allocation • Pending US trade policy & outcome from USMCA renewal negotiations • Customer production location • Chinese imports displacing our sales. • This production is moving to Mexico
Europe	• Ship to customer production plants. • Pending US trade policy & outcome from USMCA renewal negotiations
China	• IOE groups losing Market Share in China market • We support Asia market from our China plant, however most product is exported from China. • Pending US trade policy & outcome from USMCA renewal negotiations • Tier N resiliency
Rest of Asia	• Supported from our China plant, ship to Japan. • Customer Vehicle Production Allocation • Pending US trade policy & outcome from USMCA renewal negotiations
South America	• Localization in Brazil • Pending US trade policy & outcome from USMCA renewal negotiations • Auto production declines in South America as the import more Chinese vehicles.
MEA	• Pending US trade policy & outcome from USMCA renewal negotiations

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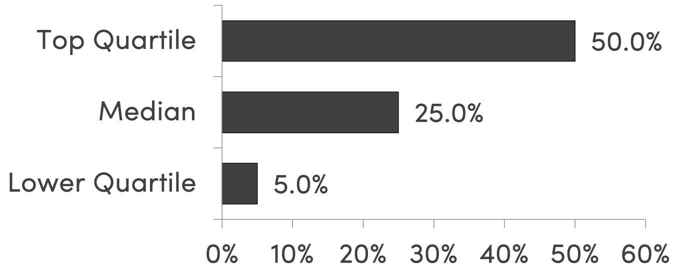
Globalization: U.S. Imports

What is the estimated split of these imports (in percent) to each of the following regions?

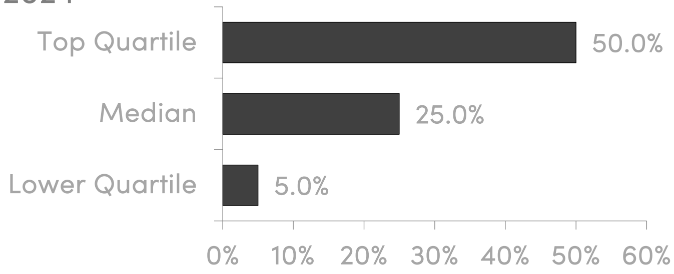
Estimate the percent of your current U.S. production that is imported outside of the United States.

2025



2025	Lower Quartile	Median	Upper Quartile	Number of respondent companies exporting to each region
Canada	0%	5%	20%	26
Mexico	0%	0%	20%	22
Europe	0%	10%	20%	30
China	0%	10%	30%	30
Rest of Asia	0%	20%	60%	28
S. America	0%	0%	0%	0
Mid-East/Africa	0%	0%	0%	1

2024



2024	Lower Quartile	Median	Upper Quartile	Number of respondent companies exporting to each region
Canada	0%	0%	11%	15
Mexico	0%	20%	44%	29
Europe	0%	13%	20%	31
China	10%	20%	40%	39
Rest of Asia	5%	23%	58%	36
S. America	0%	0%	0%	3
Mid-East/Africa	0%	0%	0%	4

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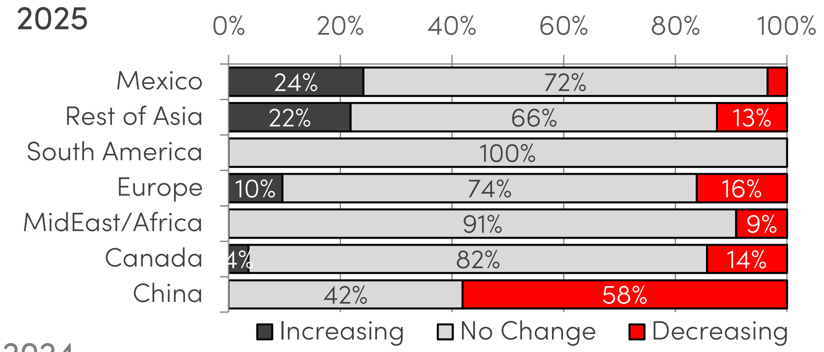
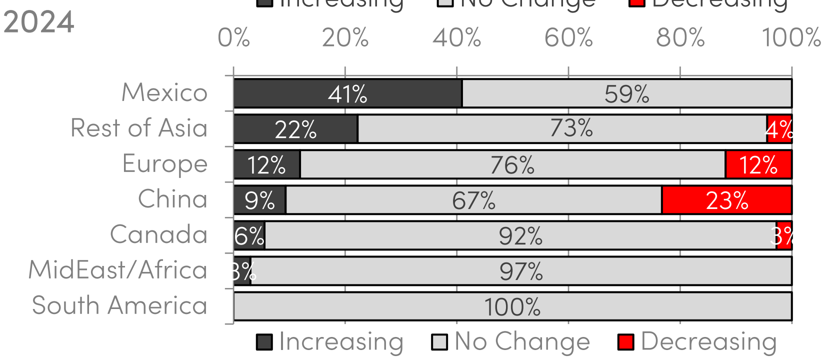
Globalization: U.S. Imports

Estimate the percent of your current U.S. production that is imported outside of the United States.





What major factors drive this regional import plan?	
Canada	• Steel tariffs • Canada based customers
Mexico	• Trend is moving from Asia to Mexico
Europe	• Competitiveness, dependent on further trade policy changes • Component availability/product offering
China	• Tier N resiliency • Geopolitical risk uncertainty • Will localize material supply
Rest of Asia	• Competitiveness, dependent on further trade policy changes • Geopolitical risk uncertainty • Will localize material supply
S. America	• *No comments provided*
Mid-East/ Africa	• *No comments provided*

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Sustainability

Q4 2025 Vehicle Supplier Barometer

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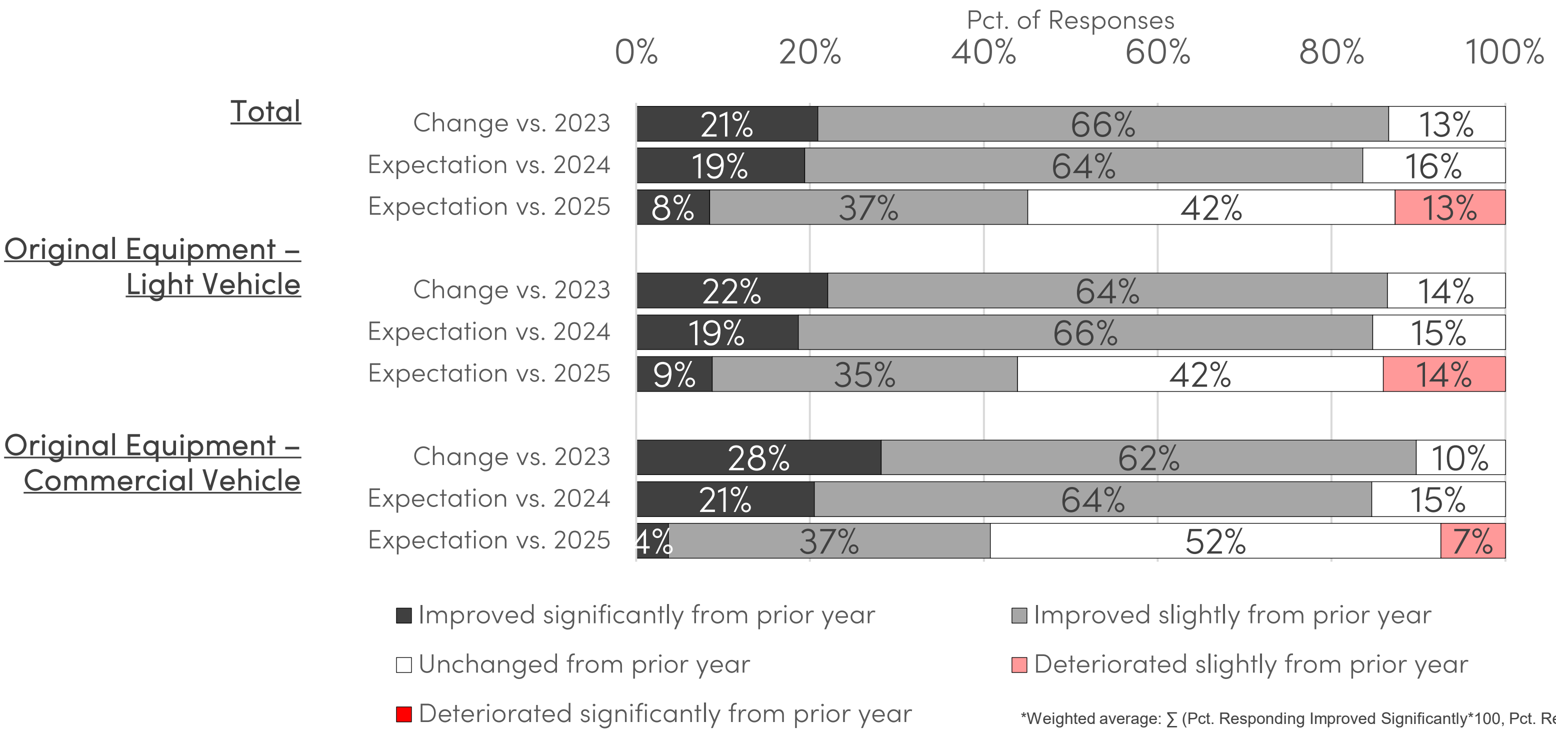
Sustainability Barometer

Please indicate your company's overall performance related to sustainability:



Sustainability Barometer Index*
77
76
60
77
76
60
79
76
59

*Weighted average: ∑ (Pct. Responding Improved Significantly*100, Pct. Responding Improved Slightly*75, Pct. Responding Unchanged*50, Pct. Responding Deteriorated Slightly*25, Pct. Responding Deteriorated Significantly*0)

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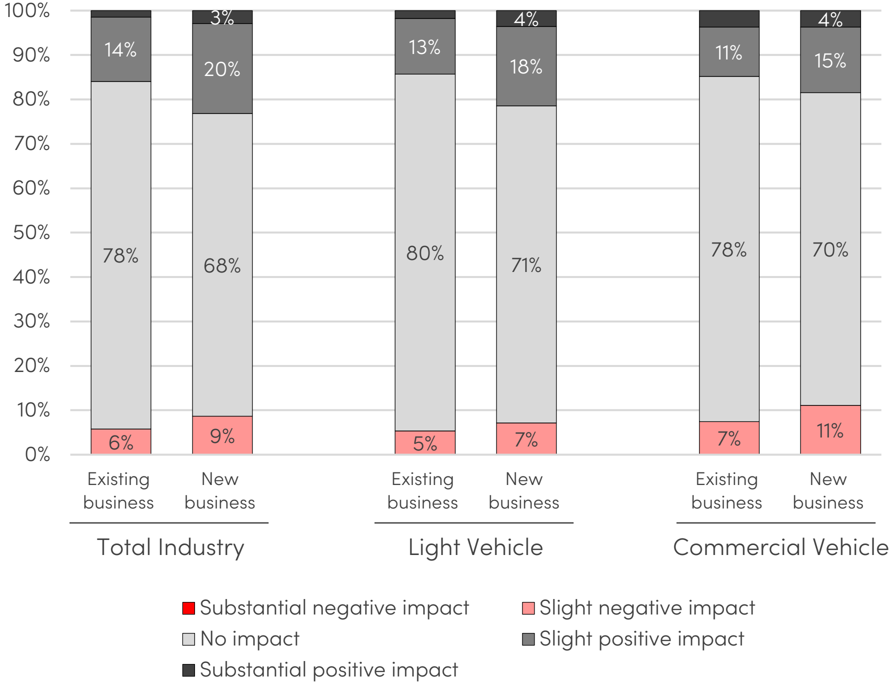
Sustainability: Business Impact

How has your company's sustainability program impacted existing and new business?



Comments:

Positive Impact:

- *No comments provided*

No Impact:

- Maintaining compliance with customers' expectations essentially.
- Automotive customers in North America are not concerned with sustainability. It is 5th or 6th priority after 1) Cost, 2) Supply Chain/Localizaton 3) Weight 4) Launch risk 5) Comfort with legacy products by OEM's

Negative Impact:

- Cost still higher as we increase sustainability efforts in most areas

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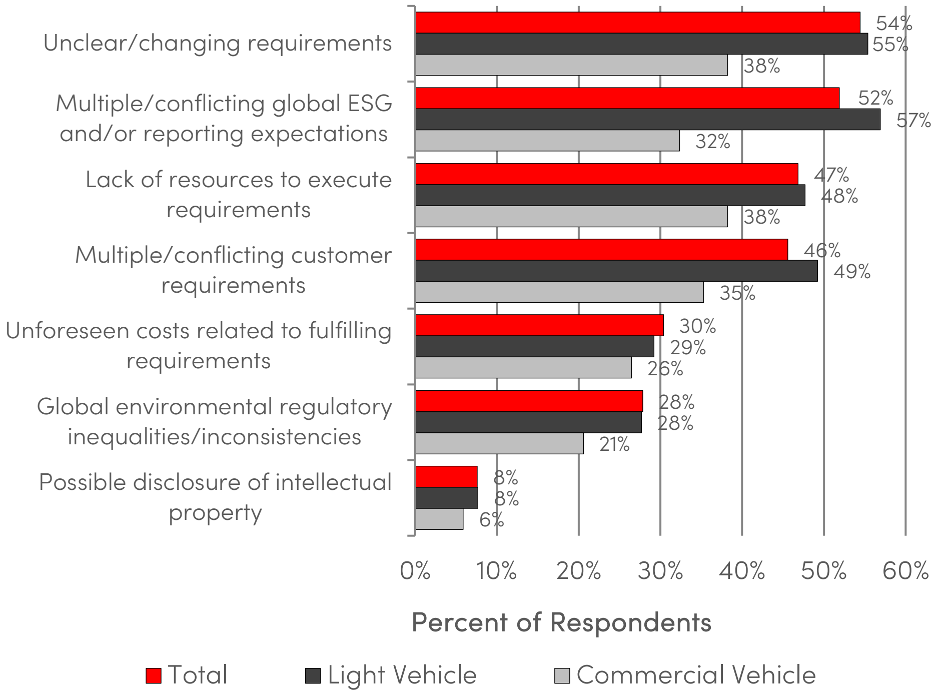
Sustainability: Concerns with Sustainability Implementation

What are your largest areas of concern related to implementing sustainability initiatives?



Comments:

- Not realistic for our processes
- We only see this from our European customers, driving costs which are not allowed to be recovered
- Regulatory changes are creating loss of focus on sustainability
- No return on investment. Many sustainable options cost more than prime materials.
- Just another layer of cost that is layered on an amazing array of ever-increasing costs. If you do not comply the customers consultants will give you demerits in your scorecard.

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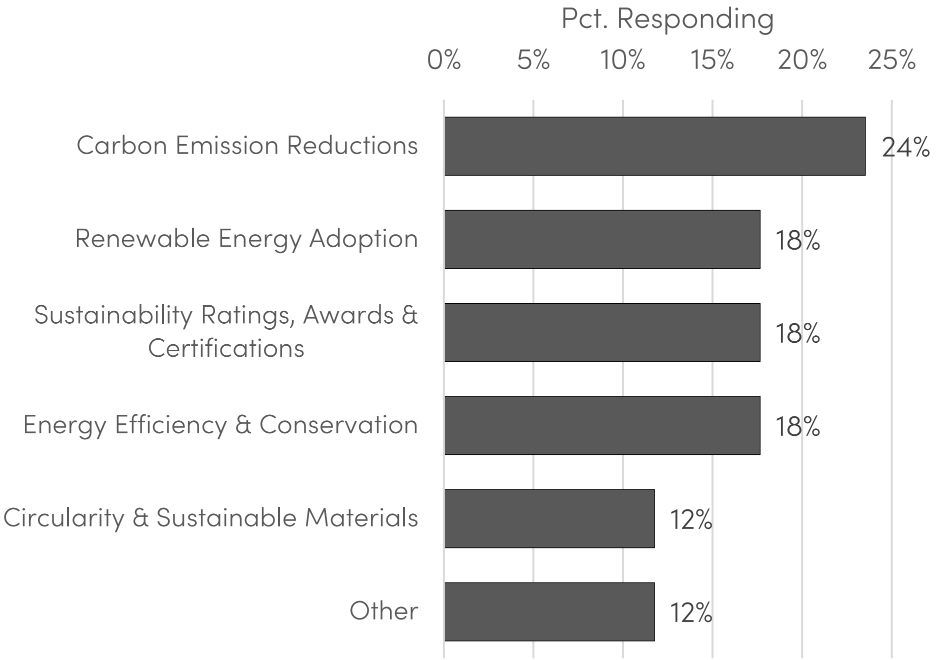
Sustainability: Biggest Win's

What was your company's biggest sustainability win over the prior year?



Comments (Selected):

Carbon Emission Reductions:
- Reduced absolute carbon emissions by 17% since 2019
- Reducing the amount of foundry coke required to produce iron
- Steps toward carbon neutrality within our supply chain

Renewable Energy Adoption:
- 60% of all energy use supplied through solar energy farms we own
- Installed a solar farm which will power one plant and sell power back to the grid
- Substantial increase in green electricity

Sustainability Ratings, Awards & Certifications:
- Won Canada's Most Responsible Company Sustainability Award with Newsweek
- ISO 14001 compliance with excellent audit scores
- Won APEX award for sustainability report
- Achieved CDP climate score of B

Energy Efficiency & Conservation:
- Energy conservation through smart factories
- General improvements in energy costs driven by efficiency

Circularity & Sustainable Materials:
- Remanufacture increase for service parts
- Launch of sustainable material division

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MEMA OE Supplier Barometer: Appendix

MEMA OE Automotive 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 November 12 – Dec 9 via invitation to online survey.
- Executives of MEMA supplier companies.
- 81 complete survey responses were received, with 104 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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