



**Asia-Pacific
Economic Cooperation**

2014/AD1/038
Agenda Item: 3

United States Market / Production / Trade/Policy Review

Purpose: Information
Submitted by: United States



**20th Automotive Dialogue
Beijing, China
22-25 April 2014**



United States Market/Production/Trade/Policy Review

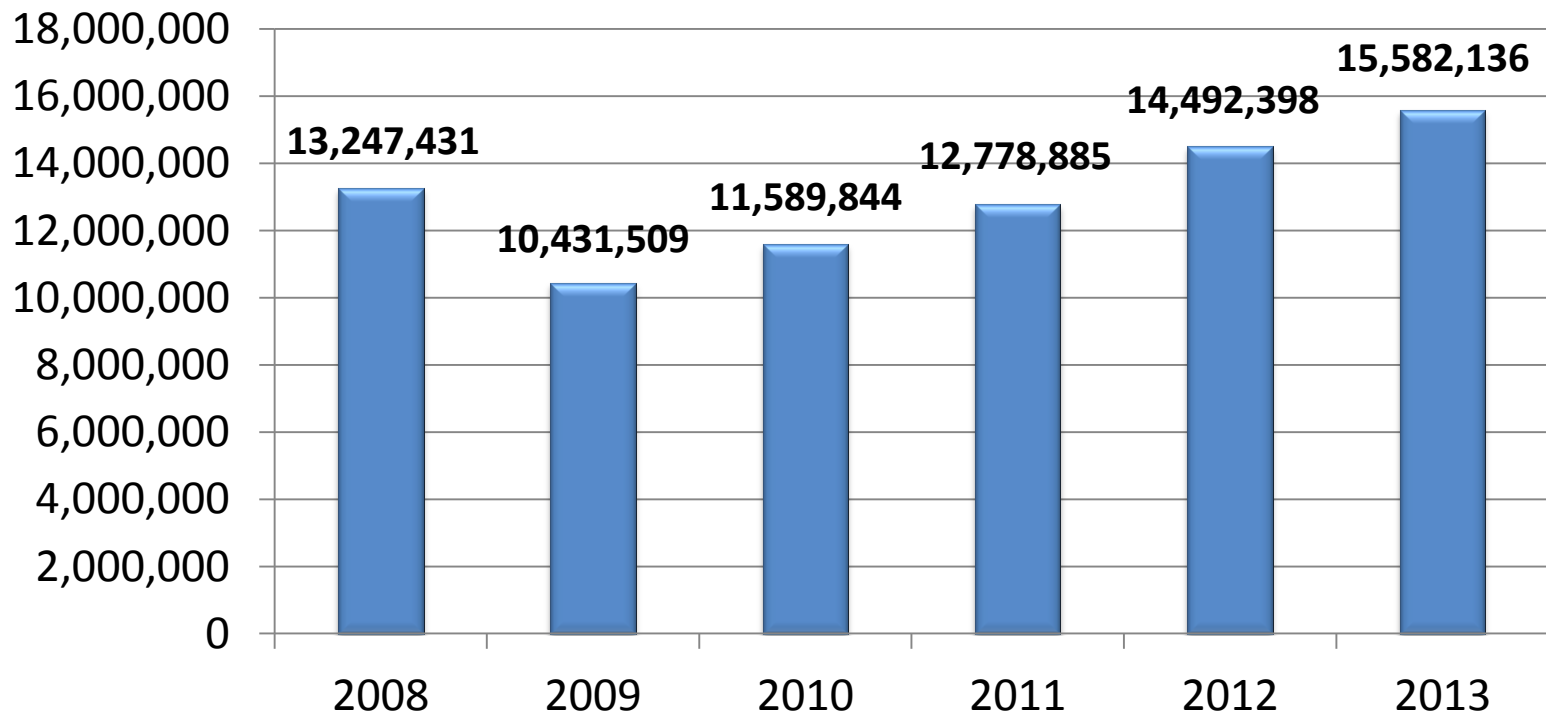
APEC Automotive Dialogue
Beijing, China
April 22-25, 2014



U.S. Auto Sales

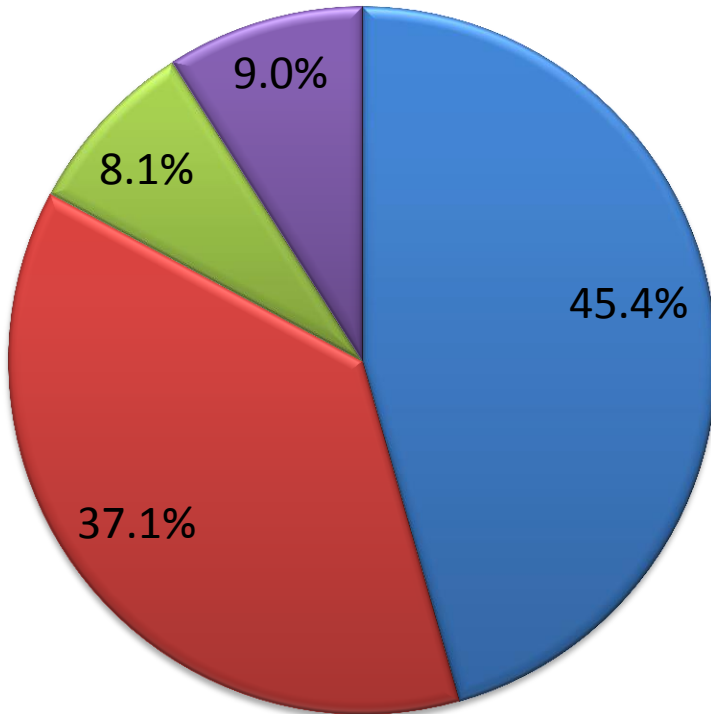
- U.S. auto sales (cars & light trucks) have steadily rebounded since the end of 2008 and 2009.
- Sales in 2013 have grown by nearly 50% compared since 2009.
- U.S. sales hit 15.6 million in 2013 (7.5% increase over 2012), and is expected to hit 16 million in 2014.

2008-2013 Auto Sales



U.S. Nameplate Market Share

2013 Sales

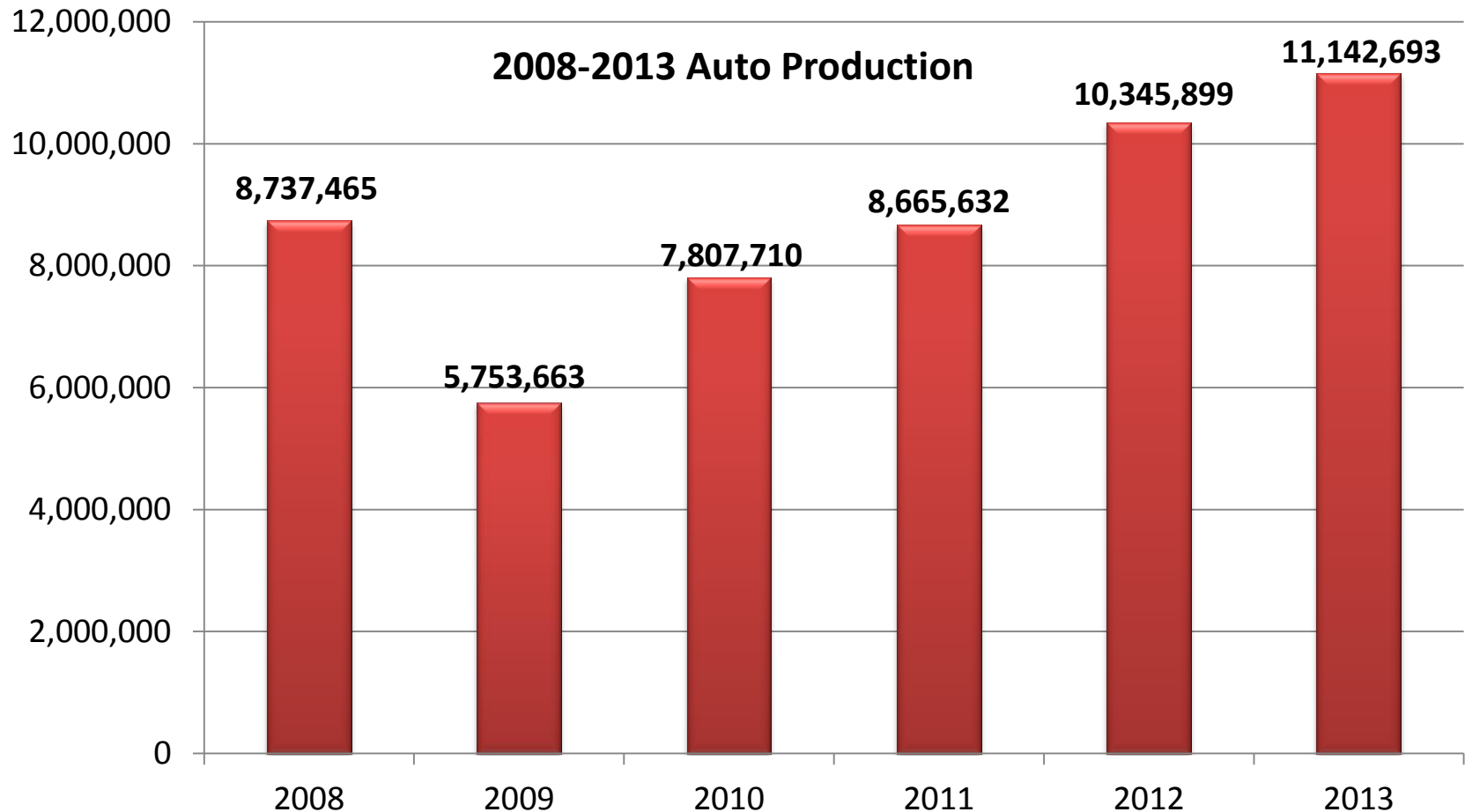


- American Nameplate Share
- Japanese Nameplate Share
- Korean Nameplate Share
- All Euro. Nameplate Share

- **American** automakers – Chrysler, Ford and GM – had 45.4% market share in 2013.
- **Japanese** automakers' market share was about 37.1%.
- **European** automakers had 9% market share.
- **Korean** automakers' (Hyundai-Kia) market share was 8.1%.

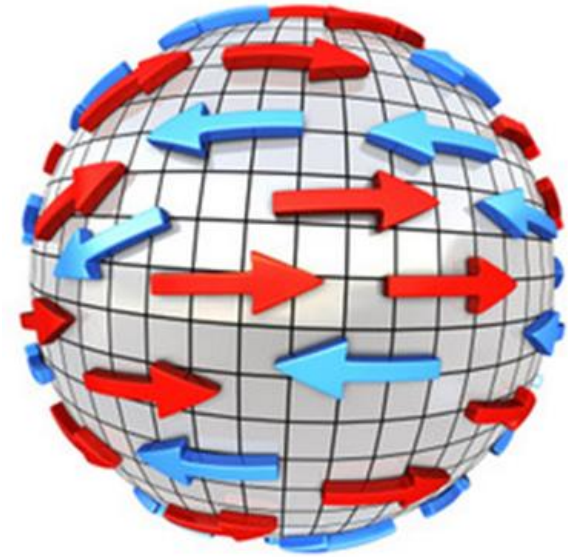
U.S. Auto Production

- U.S. auto production has been on the rise since bottoming out around 5.8 million in 2009. It grew nearly 8% in 2013.



U.S. Auto Trade

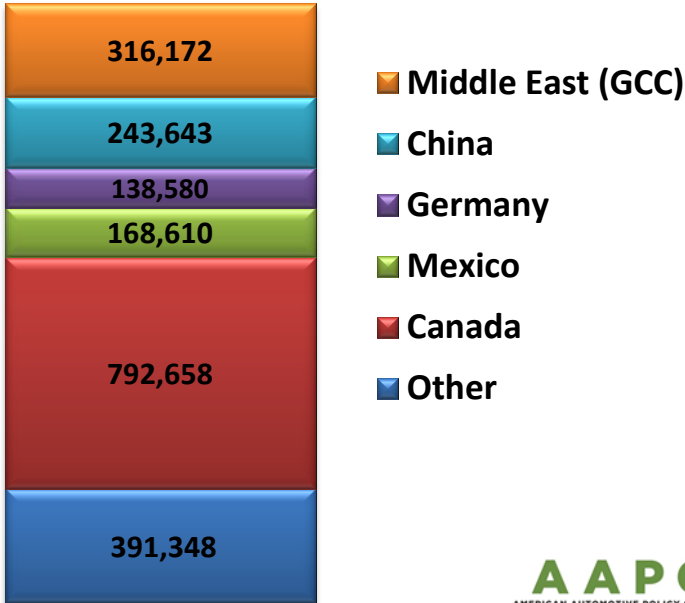
- Over the past five-years, U.S. automakers & suppliers have exported \$500 billion worth of vehicles and parts, the largest of any other single U.S. sector. They beat the next best performing sector (aerospace) by more than \$100 billion.
- In 2013 alone, U.S. automakers and suppliers exported more than \$139 billion worth of passenger vehicles & auto parts. That included more than two-million passenger vehicles last year.
- Nearly \$300 billion worth of passenger vehicles (more than 7.1 million units) and auto parts were imported into the U.S. last year.



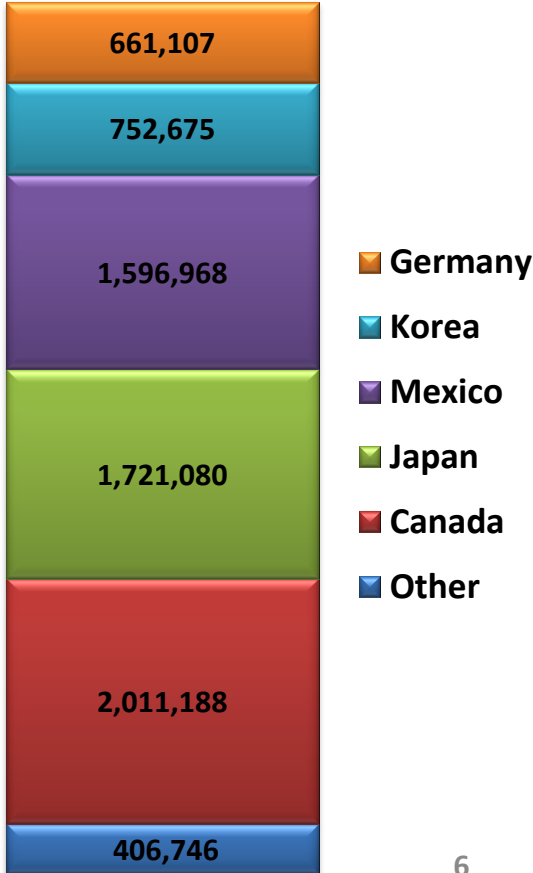
2013 U.S. Auto Trade By Units Per Country

The United States imported seven-million passenger vehicles last year (six million from four sources), while exporting two-million overseas.

Exports
TOTAL: 2,051,011



Imports
TOTAL: 7,149,764



New Tailpipe Emission Rules

- **Tier 3 Tailpipe and evaporative Emission and Vehicle Fuel Standards** – the goal is to harmonize all of the emissions and fuel economy requirements among the Environmental Protection Agency (EPA), Department of Transportation and California. Eliminating differing timelines, regulatory procedures and test methods at the federal and state levels will reduce emissions and avoid extra costs.
- Tier 3 standards set new vehicle emissions standards and lower the sulfur content of gasoline, considering the vehicle and its fuel as an integrated system. The vehicle standards reduce both tailpipe and evaporative emissions from passenger cars, light-duty trucks, medium-duty passenger vehicles, and some heavy-duty vehicles. The Tier 3 program continues the successful transition that began with EPA's Tier 2 program that reduced sulfur levels in fuel from an average of 300 ppm to 30 ppm.
- **GHG/CAFE midterm review** - By 2017, just as automakers will need to begin meeting the new requirements, regulators and the industry will complete a Technical Assessment Report of the appropriateness of the 2022-2025 standards to determine whether the standards remain appropriate.



New Safety Regulations

- **Rearview Visibility:** The U.S. Department of Transportation's National Highway Traffic Safety Administration (NHTSA) has issued a final rule requiring rear visibility technology in all new vehicles under 10,000 pounds by May 2018. Automakers already provide rearview cameras, a driver-assist technology, as a standard or optional feature on two-thirds of the nation's 50 top-selling vehicles.
- **Quieter Vehicles Sound Alert:** The safety agency continues to gather and analyze data on how best to establish a motor vehicle safety standard that provides for a means of alerting blind and other pedestrians of motor vehicle operation for hybrid and electric vehicles.
- **Mandatory EDR Requirements:** The safety agency has initiated rulemaking to require EDRs be fitted on all new light vehicles. It is also looking at expanding the amount and type of data recorded to reflect advances in onboard safety technology. Heighten public concern is currently delaying any further rulemaking on EDRs.



Thank You

AAPC

AMERICAN AUTOMOTIVE POLICY COUNCIL

