Autos Drive America®

AIADA®
American International Automobile Dealers Association

International Automakers and Dealers in America

Economic Impact Report

Autos Drive America Members

AIADA Members

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Autos Drive America®
Jobs. Trade. Growth.

This year holds a special significance as the United States celebrates its 250th anniversary. It is a moment to reflect on the enduring strength of the American spirit and the values that have built this country—innovation, resilience, and a commitment to progress. International automakers share these values and have exemplified them over the past sixty years as we have planted deep roots in our communities across the nation.

This year's Economic Impact Report illustrates our unwavering commitment to our U.S. operations. With more than $125 billion invested and a manufacturing footprint that continues to outpace domestic competitors in light vehicle production, our members continue to lead the growth of the American auto industry.

Autos Drive America's members are also leading in another important metric: At a time when cost-of-living is the top issue for American consumers, international automakers are providing the most affordable vehicle options on today's market—58 models across 10 different brands. Last year, they sold four million vehicles priced at $35,000 or less, or 76 percent of all affordable new vehicles sold in the U.S.

In an era of rapid innovation, shifting economic landscapes, and an uncertain trade future, ensuring that high-quality, safe, and technologically advanced vehicles remain within reach for American consumers is paramount.

The data within this report illustrates how international automakers and their dealer partners are navigating these headwinds. From opening 21 new plants over the last 30 years to leading the charge in advanced manufacturing, our members are not just reacting to the future—they are shaping it.

As we look toward the future, Autos Drive America remains dedicated to championing the policies that strengthen our industry and the communities we serve.

Jennifer M. Safavian
Autos Drive America President & CEO

AIADA®
American International Automobile Dealers Association

The international nameplate automobile dealers we represent at AIADA play a vital and sometimes underappreciated role in growing the American economy. This report highlights the many ways these business owners and their manufacturer partners create jobs, provide critical customer services, and invest deeply in their communities.

Across the United States, our dealers have established 9,375 locations with more than 570,000 employees and a payroll of $49 billion. Their stores are at the center of a network of local suppliers and service providers, multiplying their already substantial economic impact and helping sustain regional economies in every corner of the country.

International nameplate dealerships drive competition, innovation, and a strong focus on service that benefits American consumers. Dealership employees live and work in the communities they serve, building long-term relationships with customers and ensuring that buyers receive knowledgeable guidance, reliable service, and ongoing support throughout the life of their vehicles.

Dealers have always been deeply engaged in community life, and while no report can show the full extent of their investment, we celebrate their commitment. International manufacturers and dealers contribute to local charities, sponsor youth programs, support schools, and respond to community needs in times of crisis. Their presence strengthens not just the economy, but the bonds of community towns small and large.

Now that you have this report in your hands, I hope you will help share the important message at its core: international nameplate automakers and dealers have spent decades contributing to and building upon America's economic success. Looking ahead, we have every reason to feel optimistic about the future of our industry and the economy it helps support.

Cody Lusk
AIADA President & CEO


2026

Investment


HMMA 20th ANNIVERSARY
est. 2005
Welcome, Hyundai Team Members!


WELCOME TO
SUBARU
Assembly


5,000,000 th
SPRINTER

Affordability

International automakers provide American consumers with the most affordable[1] options on the market, selling 76% of the U.S.-made affordable vehicles bought by Americans last year.

4M

International automakers sold 4 million vehicles with an MSRP of $35,000 or less to U.S. consumers in 2025

76%

International automakers sold 76% of the 5.3 million affordable vehicles bought in the U.S. in 2025

50%

More than 50% of international automakers' non-luxury sales were vehicles with an MSRP below $35,000

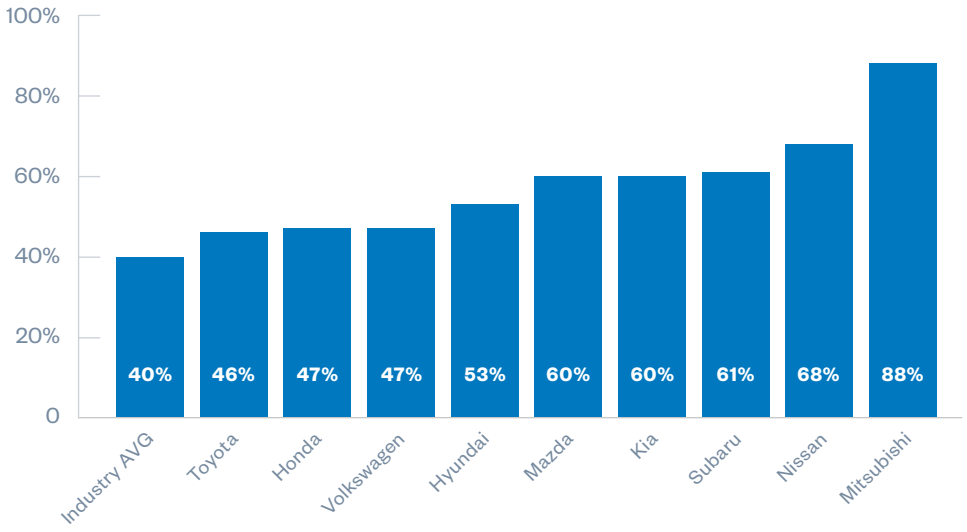
36%

36% of affordable vehicles sold by international automakers were made in the U.S.

67%

67% of affordable vehicles sold by international automakers were made in North America

International Automakers Outpace Overall Industry for Affordable Vehicle Sales as Share of Total Sales



[1] Affordable is defined as any vehicle with a Manufacturers Suggested Retail Price (MSRP) of $35,000 or less. Total affordable vehicles sold in U.S. and industry average includes Detroit 3 and Tesla.

International Automakers Offered 58 Models with Options Priced at $35,000 or Less in 2025

Manufacturing

International automakers produce nearly half of all cars and trucks made in the United States—an achievement powered by a strong and growing American workforce. Today, 156,000 U.S. employees support these operations, with two-thirds working directly in manufacturing, underscoring a deep and ongoing commitment to American production.

35

35 facilities producing vehicles, batteries, and components in 2025

4

Four new manufacturing plants began production in 2025

4.9M

4.9 million vehicles produced in 2025

49%

49% of all U.S. vehicle production in 2025

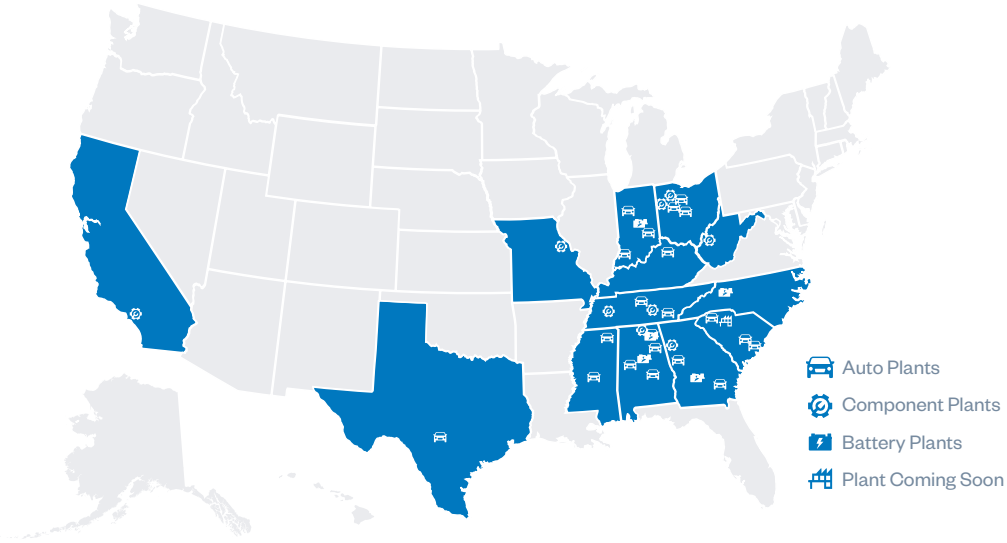
$128B

$128 billion in parts and materials purchased in 2025

$99B

$99 billion in goods and services purchased in 2025

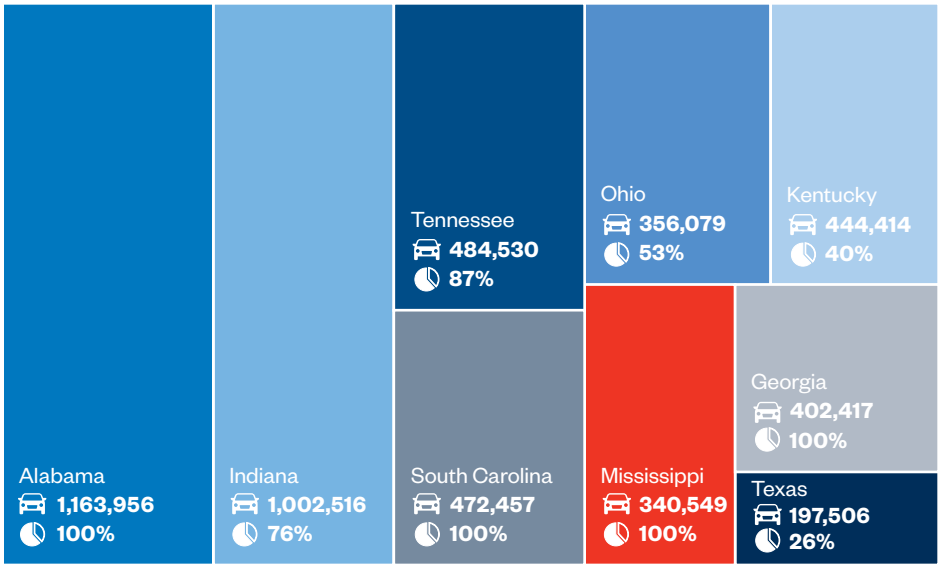
13 States with International Automaker Manufacturing Facilities



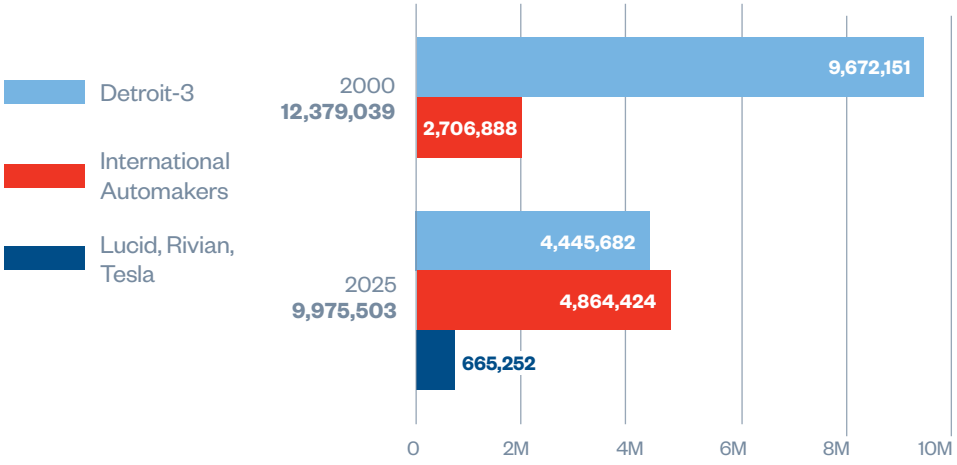
Vehicles are made, built, or manufactured in the United States using domestic and globally sourced parts.

U.S. supplier purchases include parts and materials as well as goods and services.

4.9 Million Vehicles Were Produced Across Nine States in 2025



International Automakers Have Increased Their U.S. Production by More Than 80% Over the Past 25 Years



Source: Production data from WardsAuto InfoBank for BMW Group, Honda, Hyundai, Kia, Mazda, Mercedes-Benz, Mitsubishi Motors, Nissan, Subaru, Toyota, Volkswagen Group, and Volvo Cars.

Manufacturing Facilities

State	Automaker	Facility Name	City	Production Start	Vehicles/ Components Produced
Alabama	Honda	Honda Alabama Auto Plant	Lincoln	2001	Odyssey, Passport, Pilot, Ridgeline, V-6 engines
	Hyundai	Hyundai Motor Manufacturing Alabama	Montgomery	2005	Genesis GV70, Genesis Electrified GV70, Santa Cruz, Santa Fe, Tucson, Tucson Hybrid
	Mazda-Toyota	Mazda Toyota Manufacturing, U.S.A., Inc.	Huntsville	2021	Mazda CX-50, Mazda CX-50 Hybrid, Toyota Corolla Cross, Toyota Corolla Cross Hybrid
	Mercedes-Benz	Mercedes-Benz U.S. International, Inc.	Vance	1995	EQE SUV*, EQS SUV*, Mercedes-Maybach EQS SUV*, GLE Coupe*, GLE SUV*, GLS SUV*, Mercedes-Maybach GLS SUV*††
	Mercedes-Benz	Mercedes-Benz U.S. International, Inc.	Woodstock	2022	Electric vehicle batteries
	Toyota	Toyota Motor Manufacturing, Alabama	Huntsville	2001	4-cylinder, V-6, V-6 Turbo, and Hybrid engines
California	Toyota	TABC, Inc.	Long Beach	1972	Current Tacoma model parts, Toyota service parts
Georgia	Honda	Honda Transmission Plant – Georgia	Tallapoosa	2006	Transmissions
	Hyundai	Hyundai-LG Energy Solution Electric Battery Plant	Bryan County	2025	Electric vehicle batteries
	Hyundai	Hyundai Motor Group Metaplant America	Bryan County	2025	IONIQ 5, IONIQ 9†
	Hyundai	Hyundai-SK Innovation Electric Battery Plant	Bartow County	2025	Electric vehicle batteries
	Kia	Kia Georgia	West Point	2009	EV6†, EV9, Sorento, Sportage, Telluride
Indiana	Honda	Honda Indiana Auto Plant	Greensburg	2008	Civic, Civic Hybrid, CR-V, CR-V Hybrid
	Subaru	Subaru of Indiana Automotive, Inc.	Lafayette	1989	Ascent, Crosstrek, Forester, Legacy††, Outback††
	Toyota	Toyota Motor Manufacturing, Indiana	Princeton	1996	Grand Highlander, Grand Highlander Hybrid, Highlander, Highlander Hybrid, Sienna Hybrid, Lexus TX, Lexus TX Hybrid, Lexus TX PHEV
Kentucky	Toyota	Toyota Motor Manufacturing, Kentucky	Georgetown	1986	Camry Hybrid, RAV4 Hybrid, Lexus ES††, Lexus ES Hybrid††, 4-cylinder and V-6 engines, powertrain parts, hydrogen and fuel cell modules
Mississippi	Nissan	Nissan Canton Vehicle Assembly Plant	Canton	2003	Altima, Frontier
	Toyota	Toyota Motor Manufacturing, Mississippi	Blue Springs	2007	Corolla

State	Automaker	Facility Name	City	Production Start	Vehicles/ Components Produced
Missouri	Toyota	Toyota Motor Manufacturing, Missouri	Troy	1990	Cylinder heads
North Carolina	Toyota	Toyota Battery Manufacturing, North Carolina	Liberty	2025	Electric vehicle batteries
Ohio	Honda	Honda Anna Engine Plant	Anna	1985	4-cylinder and V-6 engines
	Honda	Honda East Liberty Auto Plant	East Liberty	1989	CR-V, CR-V Hybrid, Acura MDX, Acura RDX
	Honda	Honda and LG Energy Solution JV Battery Plant	Jeffersonville	2025	Batteries
	Honda	Honda Marysville Auto Plant	Marysville	1982	Accord Sedan, Accord Hybrid, Acura Integra, Acura TLX††
	Honda	Honda Performance Manufacturing Center	Marysville	2016	Acura PMC Edition Models, CR-V e:FCEV††
	Honda	Honda Transmission Plant – Ohio	Russells Point	1996	Transmissions, gears, four-wheel-drive components, hybrid-electric systems
South Carolina	BMW	BMW Manufacturing Corp, LLC	Greer	1994	X3, X3 PHEV, X4, X5, X5 PHEV, X6, X7, XM PHEV
	BMW	BMW Manufacturing Corp, LLC	Woodruff	2030	Electric vehicle battery assembly
	Mercedes-Benz	Mercedes-Benz Vans, LLC	Ladson	2006	eSprinter Cargo*, Sprinter Cab*, Sprinter Cargo*, Sprinter Crew*, Sprinter Passenger*
	Volvo Cars	Volvo Car U.S. Operations	Ridgeville	2018	EX90, Polestar 3
Tennessee	Nissan	Nissan Decherd Powertrain Plant	Decherd	1997	Engines, crankshaft forgings, cylinder block castings
	Nissan	Nissan Smyrna Vehicle Assembly Plant	Smyrna	1983	Murano, Pathfinder, Rogue, Infiniti QX60
	Toyota	Toyota Motor Manufacturing, Tennessee	Jackson	2003	Cylinder blocks, automatic transmission parts
	Volkswagen	Volkswagen Chattanooga Plant	Chattanooga	2010	Atlas, Atlas Cross Sport, ID.4††
Texas	Toyota	Toyota Motor Manufacturing, Texas	San Antonio	2003	Sequoia, Tundra, Tundra Hybrid
West Virginia	Toyota	Toyota Motor Manufacturing, West Virginia	Buffalo	1996	Automatic transmissions, 4-cylinder engines

21 Auto Plants · 9 Component Plants · 6 Battery Plants

*Assembly only
†Production started in 2025
††Production at this facility ended in 2025

Vehicles are made, built, or manufactured in the United States using domestic and globally sourced parts.

Electrified Manufacturing

With more than $35 billion invested in U.S. electrified vehicle production, international automakers are helping define the next era of mobility. These investments are expanding American manufacturing while giving consumers more options when purchasing a vehicle that meets their needs.

42

42 electrified vehicle models* produced in America in 2025

25

25 hybrid models produced in America in 2025

11

11 battery electric vehicle (BEV) models produced in America in 2025

5

5 plug-in hybrid electric vehicle (PHEV) models produced in America in 2025

1

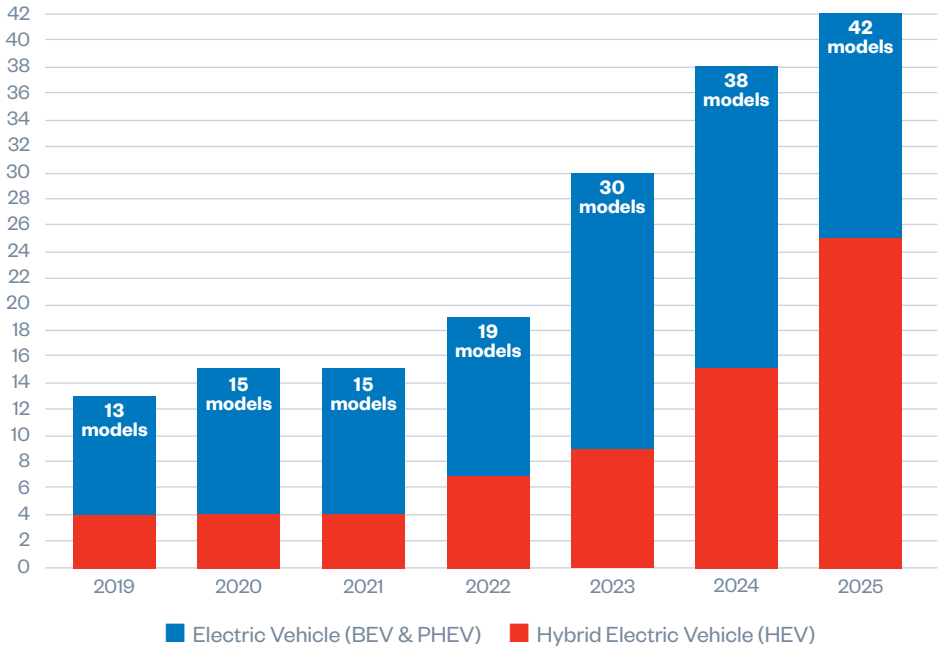
1 hydrogen fuel cell electric vehicle (FCEVs) model produced in America in 2025

*Advanced technology vehicles (electrified) include all battery electric vehicles (BEV), hybrid electric vehicles (HEV), plug-in hybrid electric vehicles (PHEV), and fuel cell vehicles (FCEV).

Toyota Indiana celebrated a major milestone in 2025 as the one millionth hybrid vehicle—a Wind Chill Pearl Sienna Platinum—rolled off the line in Princeton.

Before 2030, Volvo Cars plans to add a new, next-generation hybrid model to the production line of its plant in Ridgeville, SC. The plant currently assembles the fully electric EX90 SUV and is a contract manufacturer of the Polestar 3. Additionally, the plant is preparing to assemble the company's best-selling XC60 in 2027.

Electrified Vehicle Models Produced in the U.S. Have Increased 216% Since 2019



Source: Model counts based on Wards Automotive Production Data 2019-2025.

Vehicles are made, built, or manufactured in the United States using domestic and globally sourced parts.

Vehicles Made in America

Acura Integra*
Made in Ohio

Acura MDX*
Made in Ohio

Acura RDX*
Made in Ohio

Acura TLX*††
Made in Ohio

BMW X5 PHEV*
Made in South Carolina

BMW X6*
Made in South Carolina

BMW X7*
Made in South Carolina

BMW XM PHEV*
Made in South Carolina

Honda Civic*
Made in Indiana

Honda Civic Hybrid*
Made in Indiana

Honda CR-V*
Made in Indiana and Ohio

Honda CR-V e:FCEV††
Made in Ohio

Honda Ridgeline*
Made in Alabama

Hyundai IONIQ 5
Made in Georgia

Hyundai IONIQ 9†
Made in Georgia

Hyundai Santa Cruz*
Made in Alabama

Hyundai Santa Fe*
Made in Alabama

Kia Sorento*
Made in Georgia

Kia Sportage*
Made in Georgia

Kia Telluride*
Made in Georgia

Lexus ES*††
Made in Kentucky

Lexus ES Hybrid*††
Made in Kentucky

Mercedes-Benz
EQE SUV* **
Made in Alabama

Mercedes-Benz
EQS SUV* **
Made in Alabama

Mercedes-Benz
GLE Coupe* **
Made in Alabama

Mercedes-Benz
GLE SUV* **
Made in Alabama

Mercedes-Benz
GLS SUV* **
Made in Alabama

Mercedes-Benz
Sprinter Crew**
Made in South Carolina

Mercedes-Benz
Sprinter Passenger**
Made in South Carolina

Nissan Altima*
Made in Mississippi

Nissan Frontier*
Made in Mississippi

Nissan Murano*
Made in Tennessee

Subaru Forester*
Made in Indiana

Subaru Legacy*††
Made in Indiana

Subaru Outback*††
Made in Indiana

Toyota Camry Hybrid*
Made in Kentucky

Toyota Corolla*
Made in Mississippi

Toyota Highlander
Hybrid*
Made in Indiana

Toyota RAV4 Hybrid*
Made in Kentucky

Toyota Sequoia*
Made in Texas

Toyota Sienna Hybrid *
Made in Indiana

Toyota Tundra*
Made in Texas

Vehicles are made, built, or manufactured in the United States using domestic and globally sourced parts.

BMW X3*
Made in South Carolina

BMW X3 PHEV*
Made in South Carolina

BMW X4*
Made in South Carolina

BMW X5*
Made in South Carolina

Genesis GV70*
Made in Alabama

Genesis Electrified GV70*
Made in Alabama

Honda Accord*
Made in Ohio

Honda Accord Hybrid*
Made in Ohio

Honda CR-V Hybrid*
Made in Indiana and Ohio

Honda Odyssey*
Made in Alabama

Honda Passport*
Made in Alabama

Honda Pilot*
Made in Alabama

Hyundai Tucson*
Made in Alabama

Hyundai Tucson Hybrid
Made in Alabama

Infiniti QX60*
Made in Tennessee

Kia EV6*†
Made in Georgia

Kia EV9*
Made in Georgia

Lexus TX*
Made in Indiana

Lexus TX Hybrid*
Made in Indiana

Lexus TX PHEV*
Made in Indiana

Mazda CX-50*
Made in Alabama

Mazda CX-50 Hybrid*
Made in Alabama

Mercedes-Maybach
EQS SUV* **
Made in Alabama

Mercedes-Maybach
GLS SUV* ** ††
Made in Alabama

Mercedes-Benz
eSprinter Cargo**
Made in South Carolina

Mercedes-Benz
Sprinter Cab**
Made in South Carolina

Mercedes-Benz
Sprinter Cargo**
Made in South Carolina

Nissan Pathfinder*
Made in Tennessee

Nissan Rogue*
Made in Tennessee

Polestar 3*
Made in South Carolina

Subaru Ascent*
Made in Indiana

Subaru Crosstrek*
Made in Indiana

Toyota Corolla Cross*
Made in Alabama

Toyota Corolla Cross
Hybrid*
Made in Alabama

Toyota Grand
Highlander*
Made in Indiana

Toyota Grand Highlander
Hybrid*
Made in Indiana

Toyota Highlander*
Made in Indiana

Toyota Tundra Hybrid*
Made in Texas

Volkswagen Atlas*
Made in Tennessee

Volkswagen Atlas
Cross Sport*
Made in Tennessee

Volkswagen ID.4*††
Made in Tennessee

Volvo EX90*
Made in South Carolina

*Exported from America **Assembly only †Production started in 2025 ††Production at this facility ended in 2025

Capital & Community Investment

Over six decades, international automakers have grown their investment in their U.S. operations to $125 billion, strengthening communities and fueling the economy. This long-term commitment continues to create jobs, support local economies, and expand opportunity nationwide.

$125B

International automakers have invested $125 billion into U.S. operations

67%

Total investment has increased 67% in the past 10 years

500

International automakers operate 500 facilities across 36 states

$51B

$51 billion generated in state and local tax receipts and other revenues

$65B

$65 billion generated in federal tax receipts and other revenues

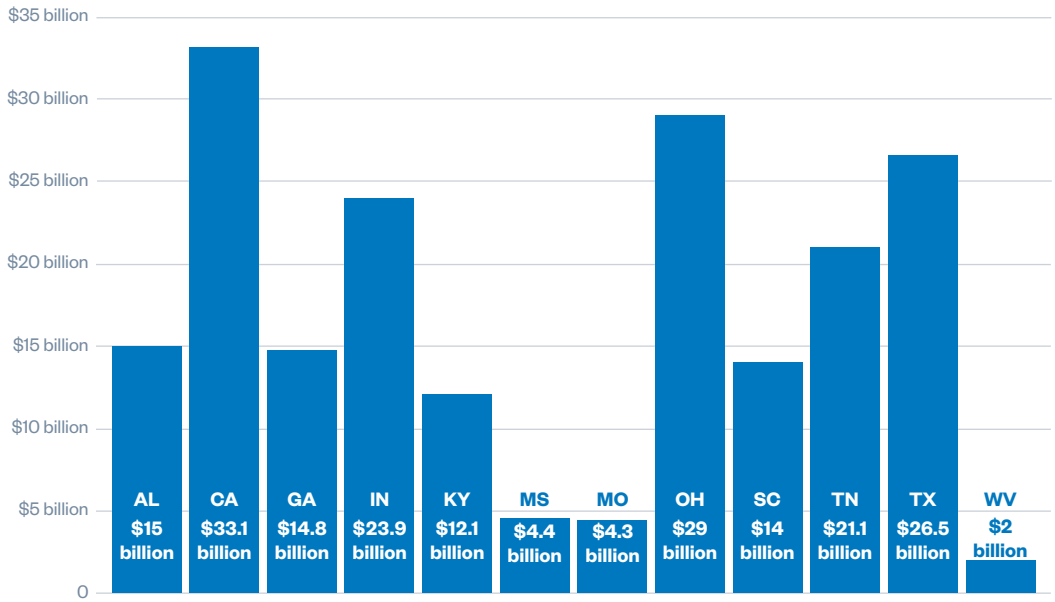
$480B

$480 billion contributed to gross domestic product in 2025

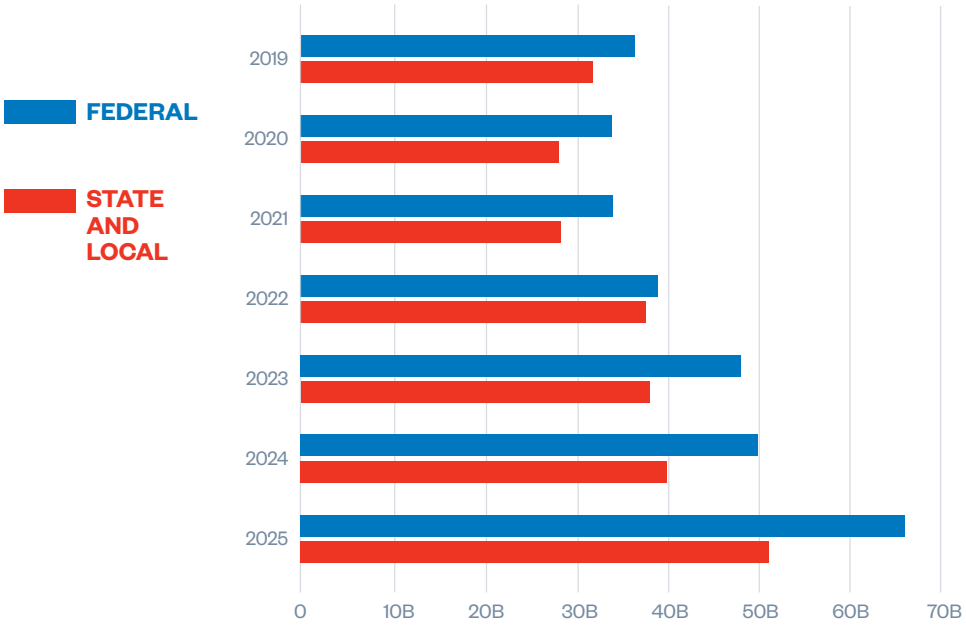
Nissan reached a new production milestone in 2025: 700,000 Murano crossovers assembled in the United States. The total includes Murano production at both the Canton, Mississippi plant—where it was assembled from 2014 to 2020—and the Smyrna, Tennessee plant, which currently assembles the vehicle.

Mercedes-Benz Vans celebrated a global milestone with the production of five million Sprinter vans. The five-millionth vehicle—an all-electric eSprinter—was assembled at the company's facility in Charleston, South Carolina and handed over to FedEx.

International Automakers and Auto Dealers Contributed Billions of Dollars to Gross State Product in 2025



Billions of Dollars in Federal, State, and Local Taxes are Generated by International Automakers and Auto Dealers



Subaru of Indiana Automotive produced its six millionth Subaru vehicle in June 2025, a 2025 Subaru Legacy Limited in Cosmic Blue Pearl.

Research & Development

As the automotive industry evolves to become a technological leader of the 21st century, international automakers are leading the way through cutting-edge research and development. Investments in advanced technologies are delivering safer, cleaner, and more innovative vehicles—while generating thousands of high-quality American jobs.

70

70 R&D facilities located in 14 states

10,000

More than 10,000 R&D employees

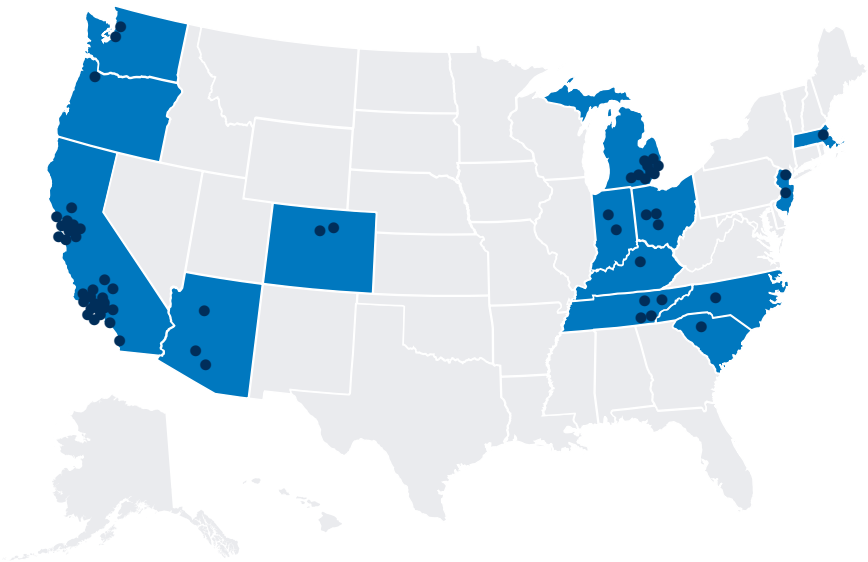
100

100 different models designed or developed in the U.S.

79%

79% of R&D employees are located in California, Michigan, and Ohio

R&D Operations are Located in 14 States



Volkswagen celebrated 5 years of its Innovation Hub at the University of Tennessee's Research Park. Since 2020, the collaboration has advanced automotive lightweight structures, sustainable metals, and electric mobility.

In 2025, Honda celebrated 50 years of research and development in the U.S., honoring the efforts of Honda associates and engineers who continue to research, design and develop innovative products and technologies that have shaped mobility and advanced the American auto industry.

International Automakers Have Been Designing and Developing Vehicles in the U.S. Since 1991

ACURA

- Acura CL*
- Acura EL
- Acura MDX*
- Acura NSX
- Acura RDX*
- Acura TL*
- Acura TLX
- Acura ZDX

GENESIS

- Genesis G70
- Genesis G80
- Genesis G90
- Genesis GV60
- Genesis GV70
- Genesis Electrified GV70
- Genesis GV80

HONDA

- Honda Accord Coupe*
- Honda Accord Sedan
- Honda Accord Wagon*
- Honda Civic
- Honda Civic Coupe*
- Honda Element
- Honda Odyssey*
- Honda Passport
- Honda Pilot*
- Honda Ridgeline*

HYUNDAI

- Hyundai Accent
- Hyundai Elantra*
- Hyundai Elantra Hybrid
- Hyundai Elantra N
- Hyundai IONIQ 5*
- Hyundai IONIQ 5 N
- Hyundai IONIQ 6
- Hyundai IONIQ 9
- Hyundai Kona*
- Hyundai Kona Electric
- Hyundai Nexo
- Hyundai Palisade
- Hyundai Santa Cruz
- Hyundai Santa Fe
- Hyundai Santa Fe Hybrid
- Hyundai Sonata
- Hyundai Sonata Hybrid
- Hyundai Tucson
- Hyundai Tucson Hybrid
- Hyundai Veloster N
- Hyundai Venue

INFINITI

- Infiniti QX50
- Infiniti QX55
- Infiniti QX60

KIA

- Kia EV6
- Kia EV9
- Kia K5
- Kia Cadenza*
- Kia Carnival
- Kia Forte*
- Kia Niro*
- Kia Rio*
- Kia Sedona*
- Kia Seltos
- Kia Sorento*
- Kia Soul*
- Kia Sportage
- Kia Stinger
- Kia Telluride

LEXUS

- Lexus ES
- Lexus ES Hybrid
- Lexus NX
- Lexus NX Hybrid

NISSAN

- Nissan Altima*
- Nissan Frontier*
- Nissan Kicks
- Nissan LEAF
- Nissan Maxima*
- Nissan Murano
- Nissan Note
- Nissan NV
- Nissan NV200
- Nissan Pathfinder
- Nissan Rogue
- Nissan Sentra*
- Nissan Titan*
- Nissan Versa
- Nissan Versa Sedan

TOYOTA

- Toyota Avalon*
- Toyota Camry
- Toyota Corolla
- Toyota Corolla Cross Hybrid
- Toyota Grand Highlander
- Toyota Grand Highlander Hybrid
- Toyota Highlander
- Toyota Highlander Hybrid
- Toyota RAV4
- Toyota RAV4 EV
- Toyota Sequoia Hybrid
- Toyota Sienna*
- Toyota Solara
- Toyota Tacoma
- Toyota Tundra*
- Toyota Tundra Hybrid
- Toyota Venza

*Multiple generations
Some models listed are no longer in production.

R&D Facilities

State	Company	Facility	City
Arizona	Nissan	Nissan Technical Center North America Arizona Testing Center	Stanfield
	Toyota	Toyota Arizona Proving Grounds	Wittmann
	Volkswagen	Volkswagen Arizona Proving Grounds	Maricopa
California	BMW	BMW of North America Engineering and Emission Test Center	Oxnard
	BMW	BMW Technology Office	Mountain View
	BMW	Designworks	Santa Monica
	Genesis	Genesis Design	El Segundo
	Honda	Acura Design Studio	Torrance
	Honda	Honda Design Studio	Torrance
	Honda	Honda Innovations, Inc.	Mountain View
	Honda	Honda Proving Center of California	Cantil
	Honda	Honda Research Institute USA, Inc., Silicon Valley Research Office	San Jose
	Hyundai	Hyundai America Technical Center, Inc. Design Center/Tech Facility	Irvine
	Hyundai	Hyundai America Technical Center, Inc. Engineering Facility	Chino
	Hyundai	Hyundai America Technical Center, Inc. Engineering Facility (Commercial Veh.)	Chino
	Hyundai	Hyundai America Technical Center, Inc. Hyundai CRADLE	Mountain View
	Hyundai	Hyundai America Technical Center, Inc. New Horizons Studio	Fremont
	Hyundai	Hyundai America Technical Center, Inc. North American Quality Center	Chino
	Hyundai	Hyundai America Technical Center, Inc. Proving Ground	California City
	Kia	Kia Design Center America	Irvine
	Mazda	Mazda R&D Irvine	Irvine
	Mercedes-Benz	Mercedes-Benz R&D North America	Carlsbad
	Mercedes-Benz	Mercedes-Benz R&D North America	Long Beach
	Mercedes-Benz	Mercedes-Benz R&D North America	Sunnyvale
	Nissan	Nissan Advanced Technology Center Silicon Valley	Santa Clara
	Nissan	Nissan Technical Center	West Sacramento
	Subaru	North American Subaru Inc.	Cypress
	Subaru	North American Subaru Inc. Design Studio	Tustin
	Toyota	Calty Design Research	Newport Beach
	Toyota	Toyota InfoTechnology Center U.S.A.	Mountain View
	Toyota	Toyota Racing Development	Costa Mesa
	Toyota	Toyota Research Institute	Palo Alto
	Volkswagen	Audi Advanced Driver Assistance R&D (Volkswagen)	San Jose
	Volkswagen	Audi of America Design Loft (Volkswagen)	Malibu

State	Company	Facility	City
California	Volkswagen	Volkswagen Innovation and Engineering Center California	Belmont
	Volkswagen	Volkswagen Oxnard Engineering Campus	Oxnard
	Volvo Cars	Volvo Cars Silicon Valley Tech Center	Sunnyvale
Colorado	Honda	American Honda Motor Co., Inc., Denver Test Lab	Denver
	Volkswagen	Audi Test Lab (Volkswagen)	Golden
Indiana	Honda	American Honda Motor Indianapolis Development Facility	Brownsburg
	Subaru	North American Subaru, Inc.	Lafayette
Kentucky	Toyota	Toyota Production Engineering and Manufacturing Center	Georgetown
Massachusetts	Toyota	Toyota Research Institute	Cambridge
Michigan	Honda	American Honda Motor Co., Inc., Ann Arbor Test Lab	Ann Arbor
	Hyundai	Hyundai America Technical Center, Inc.	Superior Township
	Hyundai	Hyundai Safety Test and Investigation Laboratory	Superior Township
	Mercedes-Benz	Mercedes-Benz R&D North America	Ann Arbor
	Mercedes-Benz	Mercedes-Benz R&D North America	Farmington Hills
	Mitsubishi	Mitsubishi Motors R&D of America, Inc	Ann Arbor
	Nissan	Nissan Technical Center North America	Farmington Hills
	Subaru	North American Subaru, Inc.	Van Buren Township
	Toyota	Calty Design Research (Toyota)	Ann Arbor
	Toyota	Toyota Motor North America R&D	Ann Arbor
	Toyota	Toyota Motor North America R&D	Saline
	Toyota	Woven by Toyota	Ann Arbor
New Jersey	Subaru	North American Subaru, Inc.	Pennsauken
	Volkswagen	Volkswagen Allendale Test Center	Allendale
North Carolina	Toyota	Toyota Racing Development	Salisbury
Ohio	Honda	Honda Ohio Research Office (99P Labs)	Columbus
	Honda	Honda Automotive Labs of Ohio (HALO)	East Liberty
	Honda	Honda North American Auto Development Center	Raymond
Oregon	JLR	Jaguar Land Rover Global Digital Design Center	Portland
South Carolina	BMW	BMW Group Information Technology Research Center	Greenville
Tennessee	Volkswagen	Volkswagen Battery Engineering Lab	Chattanooga
	Volkswagen	Volkswagen Chattanooga Engineering Hub	Chattanooga
	Volkswagen	Volkswagen Innovation Hub	Knoxville
	Volkswagen	Volkswagen Vehicle Integration Center	Chattanooga
Washington	Mercedes-Benz	Mercedes-Benz R&D North America	Seattle
	Volkswagen	Volkswagen Automotive Cloud, LLC	Redmond

Design/ Development · Electric Vehicles · Autonomous Vehicles · Testing/Proving Grounds · Advanced Technology & Innovation


2025

People


MAZDA TOYOTA
ERIC W.
Team ONE


Chattanooga
Chattanooga


NISSAN

Employment

In 2025 alone, international automakers supported 2.9 million U.S. jobs, reinforcing their role as a key pillar of the American workforce. From factory floors and corporate offices to ports, research and development facilities, and dealerships, these employees drive the innovation and excellence behind every vehicle.

156,000

156,000 direct U.S. employees

$17.2B

Direct employee payroll of $17.2 billion

99,000

99,000 direct jobs in manufacturing

2.9M

2.9 million direct and indirect U.S. jobs generated

$255B

Total employee compensation of $255 billion in 2025

Indirect economic impacts derived by SCOUT Economics using direct employment, dealer employment, and auto parts employment multipliers at the state and national levels.

Hyundai Motor Manufacturing Alabama opened a new $14 million Care Center, providing health, wellness, and support services for its 4,000 team members. The facility houses the HMMA medical clinic, a physical therapy clinic, an Emergency Response Team, a fitness center, and a teamwear store.

Workforce Development

International automakers are making significant investments in workforce development programs to prepare employees for the future of advanced manufacturing, EV technology, robotics, automation, and AI-enabled production. These initiatives strengthen America's manufacturing workforce while creating long-term career pathways in local communities.

26

Development and training programs operate across 26 states, including major manufacturing hubs in the Southeast and Midwest

70%

70% of training programs reported the majority of their participants achieved job placement and/or job promotions

50%

50% of companies collaborate with auto dealers on training programs

22,000+

More than 22,000 workers and students were reached through workforce development and technical training programs in 2025

Source: The 2025 Autos Drive America Workforce Development Survey

Workforce Development Investment Priorities

Workforce Development

BMW | STEP and MSTEP: BMW Group University's flagship program, STEP (Service Technician Education Program) is a 16-week BMW technical training program, where students develop the skills needed to repair and maintain BMW vehicles. Since 1997, over 8,641 students have completed BMW's STEP program. BMW was the first premium automaker to open a technician training facility on a U.S. military base—BMW MSTEP—first at Camp Pendleton, then Fort Bragg, with the objective to support veterans transitioning into civilian life and to provide qualified staff for BMW dealerships.

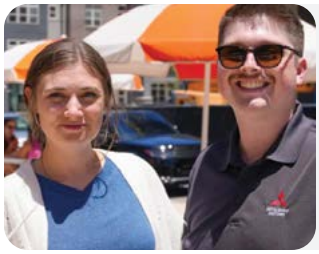
Honda | Ohio State University: Honda marked 25 years of partnership with The Ohio State University in 2025, building on a longstanding commitment to talent development and innovation. Through the new Honda Launchpad program, students gain opportunities for career exploration, professional development, and industry engagement that help prepare the next generation of mobility leaders.

Hyundai | Montgomery Public Schools: Hyundai Motor Manufacturing Alabama has partnered with Montgomery Public Schools for more than two decades to support student success and workforce readiness. In addition to a recent $25,000 contribution to the district's Back to School Bash, Hyundai continues to invest in educational initiatives that help students develop the skills needed for future careers.

Kia | Technical College System of Georgia: Kia Georgia partners with the Technical College System of Georgia to strengthen the state's workforce pipeline and expand access to technical education. In 2025, the company invested $100,000 in the TCSG Foundation to support students across 22 colleges, helping remove financial barriers and create pathways to high-demand careers.

Mazda | Federation of Advanced Manufacturing (FAME): Mazda Toyota Manufacturing supports the Federation for Advanced Manufacturing Education (FAME), a community college-based co-op program that prepares students and employees for skilled manufacturing careers. Through tuition assistance and continued pay and benefits for employee participants, MTM helps develop talent while supporting a program with a more than 90% success rate for technician placement.

Mercedes-Benz | Shelton State Community College and AIDT: Mercedes-Benz U.S. International partners with Shelton State Community College and AIDT through its Mechatronics Program, which combines paid on-the-job training with postsecondary education. The program creates opportunities for local talent while helping meet the long-term workforce needs of Alabama's automotive industry.



Mitsubishi | Drive to Thrive Program: Mitsubishi Motors North America invests in employee growth through a comprehensive approach to professional development that includes thousands of online learning resources, educational reimbursement, and personalized career planning. Programs such as Drive to Thrive support skill development and internal mobility, helping employees build long-term careers while strengthening the company's future workforce.

Nissan | Central Mississippi Planning and Development District: Nissan partners with the Central Mississippi Planning and Development District to provide paid internships for high school and college students interested in advanced manufacturing and industrial maintenance. The program gives participants hands-on experience and leadership development opportunities while creating pathways to careers in Mississippi's growing manufacturing sector.

Subaru | Career Advancement Program: Subaru of Indiana Automotive helps prepare the next generation of manufacturing leaders through its Career Advancement Program, a 12-month rotational experience for recent engineering graduates. Participants gain hands-on experience across multiple disciplines before transitioning into permanent roles that align with their interests, skills, and business needs.

Toyota | T-TEN Program: Toyota connects students with hands-on training and real-world experience through its T-TEN program, which brings together 36 colleges and Toyota and Lexus dealerships nationwide. The collaborative program equips participants with the skills needed for successful careers as automotive technicians while helping build a strong workforce pipeline.

Volkswagen | Volkswagen Academy: Volkswagen has partnered with Chattanooga State Community College since 2010 to prepare apprentices for careers across its Tennessee operations. More than 280 participants have completed the program, and over 65% of graduates remain with the company today, helping build a strong pipeline of skilled talent across nearly every department.

Volvo Cars | East Coast Polytechnic Institute: Volvo Cars partnered with ECPI to create a customized apprenticeship program that prepares employees for increasingly advanced technical roles in manufacturing. By combining classroom instruction, structured on-the-job training, and one-on-one mentorship, the program helps employees develop new skills while strengthening Volvo Cars' long-term workforce pipeline.


2020

Trade

U.S.-Made Exports

American-built vehicles are making an impact far beyond U.S. borders: International automakers export thousands of U.S.-made vehicles worldwide, strengthening global trade and extending the reach of American manufacturing.

$30B

$30 billion in vehicle exports in 2025

751K

751,000 U.S.-built vehicles exported by international automakers in 2025

130

Vehicles exported to nearly 130 countries and territories

15%

15% of American-made vehicles were exported in 2025

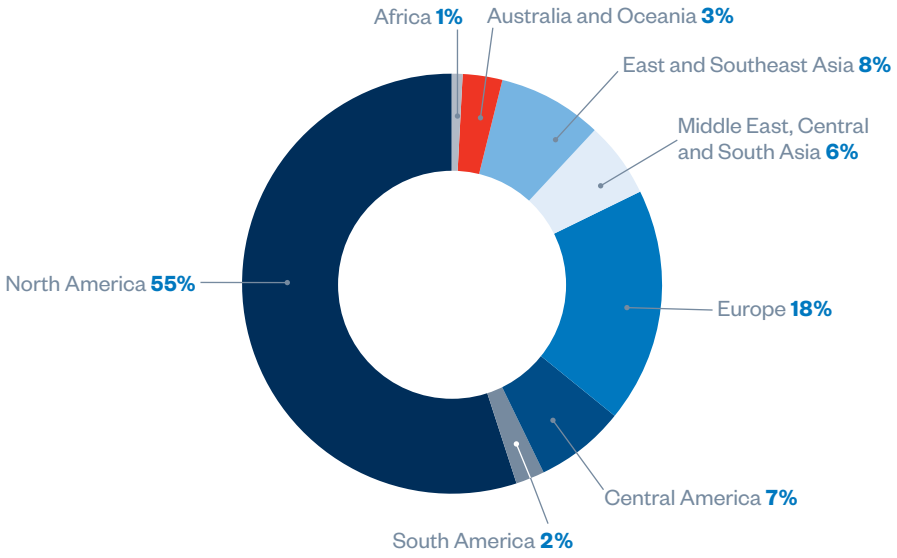
77

77 different models exported from international automakers' U.S. manufacturing facilities

66%

66% of exports in 2025 were to U.S. free trade agreement partners

U.S.-Built Vehicles are Exported Worldwide



Vehicles are made, built, or manufactured in the United States using domestic and globally sourced parts.

Toyota announced plans to export U.S.-built Tundra, Highlander, and Camry models to Japan beginning in 2026.

Trade Supports Jobs in Manufacturing States

State	Total Jobs	2025 Production	Models Exported
Alabama	105,806	1,163,956	Honda: Odyssey, Passport, Pilot, Ridgeline Hyundai: Santa Cruz, Santa Fe, Tucson, Genesis GV70, Genesis Electrified GV70 Mazda: CX-50, CX-50 Hybrid Mercedes-Benz: EQE SUV, EQS SUV, GLE Coupe, GLE SUV, GLS SUV, Mercedes-Maybach EQS SUV, Mercedes-Maybach GLS SUV Toyota: Corolla Cross, Corolla Cross Hybrid
Georgia	95,684	402,417	Kia: EV6, EV9, Sorento, Sportage, Telluride
Indiana	149,027	1,002,516	Honda: Civic, Civic Hybrid, CR-V, CR-V Hybrid Subaru: Ascent, Crosstrek, Forester, Legacy, Outback Toyota: Grand Highlander, Grand Highlander Hybrid, Highlander, Highlander Hybrid, Sienna Hybrid, Lexus TX, Lexus TX Hybrid, Lexus TX PHEV
Kentucky	82,277	444,414	Toyota: Camry Hybrid, RAV4 Hybrid, Lexus ES, Lexus ES Hybrid
Mississippi	33,724	340,549	Nissan: Altima, Frontier Toyota: Corolla
Ohio	207,533	356,079	Honda: Accord, Accord Hybrid, CR-V, CR-V Hybrid, Acura Integra, Acura MDX, Acura RDX, Acura TLX
South Carolina	95,098	472,457	BMW: X3, X3 PHEV, X4, X5, X5 PHEV, X6, X7, XM PHEV Volvo Cars: EX90, Polestar 3
Tennessee	132,860	484,530	Nissan: Murano, Pathfinder, Rogue, Infiniti QX60 Volkswagen: Atlas, Atlas Cross Sport, ID.4
Texas	155,594	197,506	Toyota: Sequoia, Tundra, Tundra Hybrid

Source: Production data from WardsAuto InfoBank for BMW Group, Honda, Hyundai, Kia, Mazda, Mercedes-Benz, Mitsubishi Motors, Nissan, Subaru, Toyota, Volkswagen Group, and Volvo Cars. Total jobs derived by SCOUT Economics using direct employment, dealer employment, and auto parts employment multipliers at the state and national levels.

Top Export Markets

Rank	Exports	Total Volume
1	*Canada*	198,013
2	*Mexico*	141,674
3	European Union*	86,263
4	Gulf Corporation Council**	33,383
5	*South Korea*	32,282
6	*Australia*	15,600
7	United Kingdom	13,452
8	Japan	8,640
9	Thailand	4,983
10	Switzerland	4,321
11	Colombia	3,373
12	South Africa	2,390
13	Brazil	2,260
14	Norway	1,876
15	*Chile*	1,870

Italics indicate country the U.S. has an FTA in effect with
*EU 27
**Consists of Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates

BMW Manufacturing led the nation in automotive exports by value in 2025, shipping nearly 200,000 BMW X models worth $9 billion from South Carolina.

Exports by Seaport

Port	Models Exported
Long Beach, CA	Honda: Accord, CR-V, CR-V Hybrid, Odyssey, Passport, Pilot, Ridgeline, Acura Integra, Acura MDX, Acura RDX, Acura TLX Hyundai: Santa Cruz, Santa Fe Subaru: Ascent, Crosstrek, Forester Toyota: Camry Hybrid, Corolla, Corolla Cross, Corolla Cross Hybrid, Grand Highlander, Grand Highlander Hybrid, Highlander, Sequoia Hybrid, Sienna Hybrid, Tacoma, Tacoma Hybrid, Tundra, Tundra Hybrid, Lexus TX, Lexus TX Hybrid, Lexus TX PHEV
Los Angeles, CA	Kia: EV9, Sorento, Telluride
National City, CA	Toyota: Camry Hybrid, Corolla Cross, Corolla Cross Hybrid, Grand Highlander, Grand Highlander Hybrid, Highlander, Highlander Hybrid, Sequoia Hybrid, Sienna Hybrid, Tacoma, Tacoma Hybrid, Tundra, Tundra Hybrid, Lexus ES Hybrid, Lexus TX, Lexus TX Hybrid, Lexus TX PHEV
Oakland, CA	Toyota: Corolla Cross, Highlander, Sequoia, Tacoma, Tundra
Port Hueneme, CA	Honda: Accord, CR-V, Passport, Pilot Toyota: Camry Hybrid, Highlander, Highlander Hybrid, Sienna Hybrid, Tundra
Blount Island, FL	Toyota: Highlander, Highlander Hybrid, Sequoia Hybrid, Tundra, Tundra Hybrid
Jacksonville, FL	BMW: X3, X4, X5, X6, X7 Honda: Accord, Accord Hybrid, Civic, CR-V, CR-V Hybrid, Odyssey, Pilot, Ridgeline, Acura Integra, Acura MDX, Acura RDX Hyundai: Santa Cruz, Santa Fe, Genesis GV70 Kia: Sorento, Sportage, Telluride Mazda: CX-50 Mercedes-Benz: EQE SUV, EQS SUV, GLE Coupe, GLE SUV, GLS SUV, Mercedes-Maybach GLS SUV Nissan: Altima, Frontier, Murano, Pathfinder, Infiniti QX60 Subaru: Ascent, Crosstrek, Forester, Outback Toyota: Highlander, Highlander Hybrid, Sequoia Hybrid, Tundra, Tundra Hybrid Volkswagen: Atlas Volvo Cars: EX90, Polestar 3
Miami, FL	BMW: X3, X4, X5 Honda: Odyssey, Pilot, Ridgeline
Port Everglades, FL	BMW: X3, X3 PHEV, X4, X5, X5 PHEV, X6, X7, XM PHEV Hyundai: Santa Fe Mercedes-Benz: EQE SUV, EQS SUV, GLE SUV, GLS SUV, Mercedes-Maybach GLS SUV
Brunswick, GA	BMW: X3, X3 PHEV, X4, X5, X5 PHEV, X6, X7, XM PHEV Honda: Accord Hybrid, CR-V, Odyssey, Passport, Pilot, Ridgeline, Acura Integra Kia: Telluride Mercedes-Benz: EQE SUV, EQS SUV, GLE SUV, GLS SUV, Mercedes-Maybach EQS SUV, Mercedes-Maybach GLS SUV Nissan: Altima, Pathfinder, Infiniti QX60 Toyota: Highlander, Highlander Hybrid, Tacoma Volkswagen: Atlas Volvo Cars: EX90, Polestar 3
Savannah, GA	Honda: Ridgeline Mercedes-Benz: EQE SUV, EQS SUV, GLE Coupe, GLE SUV, GLS SUV, Mercedes-Maybach GLS SUV Nissan: Frontier, Pathfinder Subaru: Ascent
Baltimore, MD	BMW: X3, X3 PHEV, X4, X5, X5 PHEV, X6, X7, XM PHEV Honda: Accord, Accord Hybrid, Civic, CR-V, CR-V Hybrid, Acura Integra, Acura MDX, Acura RDX, Acura TLX Nissan: Pathfinder, Infiniti QX60 Subaru: Ascent
Portland, OR	Honda: Accord, Accord Hybrid, Odyssey, Pilot
Charleston, SC	BMW: X3, X3 PHEV, X4, X5, X5 PHEV, X6, X7, XM PHEV Volvo Cars: EX90, Polestar 3


2026

Sales


Audi Jacksonville


TAMERON
Honda Hoover
You're Going To Love The Way
You're Treated!


CAR PROS
Cares


Mercedes-Benz


CA
City Auto
STUDENT DRIVER

Dealerships

Across the country, international nameplate dealerships are integral to local communities and the broader economy. They account for more than half of all U.S. dealership jobs and serve as the front line of customer engagement, connecting consumers with trusted global brands.

9,375

9,375 international nameplate automobile dealer franchises across the country

570,042

570,042 direct U.S. dealership employees

$49B

Payroll of $49 billion

50%+

More than half of all U.S. dealership jobs are created by international nameplate automobile dealers

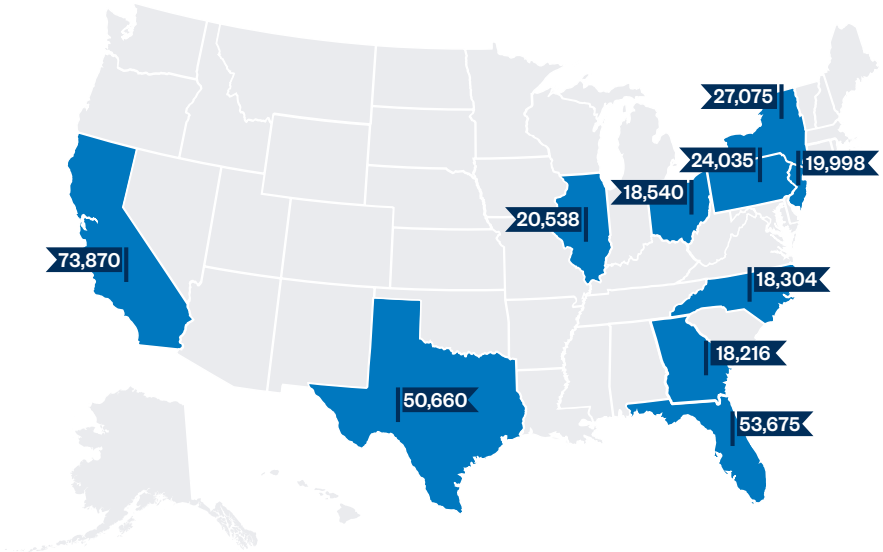
605,000

605,000 indirect jobs created by international nameplate dealerships in 2025

Kia America proudly announced the sale of its one millionth Certified Pre-Owned (CPO) vehicle, a significant milestone that underscores the continued success and trust in Kia's CPO program. The landmark sale took place at Kia of Brandon in Tampa, Florida, featuring a 2024 Kia EV6 Light Long Range.

Volvo Car USA announced the sale of its five millionth new car, a Volvo XC60, in the United States. The milestone came as the brand celebrated its 70th anniversary in the U.S. market.

Top 10 States for International Nameplate Dealership Employment



Dealership Employment

State	No. of Dealership Franchises	Dealership Employment	Average Annual Earnings Per Employee	Total Dealership Employee Compensation
Alabama	143	7,336	$81,796	$600,055,456
Alaska	21	804	$83,512	$67,143,648
Arizona	159	15,147	$84,448	$1,279,133,856
Arkansas	70	3,290	$73,840	$242,933,600
California	962	73,870	$96,928	$7,160,071,360
Colorado	158	11,088	$88,712	$983,638,656
Connecticut	174	8,528	$87,152	$743,232,256
Delaware	36	2,130	$77,636	$165,364,680
Florida	625	53,675	$90,428	$4,853,722,900
Georgia	272	18,216	$86,164	$1,569,563,424
Hawaii	35	1,890	$91,780	$173,464,200
Idaho	58	3,234	$77,792	$251,579,328
Illinois	382	20,538	$78,000	$1,601,964,000
Indiana	183	8,512	$74,308	$632,509,696
Iowa	94	3,626	$73,216	$265,481,216
Kansas	83	3,552	$73,632	$261,540,864
Kentucky	110	6,077	$75,140	$456,625,780
Louisiana	152	7,398	$74,152	$548,576,496
Maine	66	2,756	$79,872	$220,127,232
Maryland	215	14,308	$84,344	$1,206,793,952
Massachusetts	246	13,572	$95,524	$1,296,451,728
Michigan	227	9,628	$80,704	$777,018,112
Minnesota	126	7,198	$74,204	$534,120,392
Mississippi	82	3,773	$67,964	$256,428,172
Missouri	150	8,052	$77,220	$621,775,440
Montana	40	1,710	$76,232	$130,356,720
Nebraska	55	2,500	$72,072	$180,180,000
Nevada	66	6,080	$94,536	$574,778,880
New Hampshire	93	4,316	$97,812	$422,156,592
New Jersey	325	19,998	$94,016	$1,880,131,968
New Mexico	62	3,304	$78,468	$259,258,272
New York	528	27,075	$87,672	$2,373,719,400
North Carolina	317	18,304	$80,444	$1,472,446,976
North Dakota	31	1,197	$72,020	$86,207,940
Ohio	367	18,540	$76,648	$1,421,053,920
Oklahoma	88	4,814	$74,828	$360,221,992
Oregon	137	7,493	$80,912	$606,273,616
Pennsylvania	500	24,035	$73,788	$1,773,494,580
Rhode Island	40	2,310	$79,664	$184,023,840
South Carolina	157	8,990	$82,316	$740,020,840
South Dakota	27	1,000	$72,072	$72,072,000
Tennessee	192	11,220	$85,228	$956,258,160
Texas	636	50,660	$90,116	$4,565,276,560
Utah	77	5,092	$80,236	$408,561,712
Vermont	40	1,368	$79,560	$108,838,080
Virginia	281	16,770	$83,044	$1,392,647,880
Washington	207	13,703	$87,464	$1,198,519,192
West Virginia	77	2,944	$66,976	$197,177,344
Wisconsin	184	7,701	$69,264	$533,402,064
Wyoming	19	720	$70,304	$50,618,880
Total	**9,375**	**570,042**	**$80,683***	**$48,717,013,852**

Source: AIADA Membership Roster and NADA DATA.
*National average annual earnings for employee at international nameplate automobile dealership

U.S. Vehicle Sales

International automakers continue to lead in the U.S. market, capturing more than half of all new vehicle sales in 2025. These sales represent the wide array of choices international automakers offer consumers as well as sustained economic impact and job support across the nation.

9.4M

9.4 million new vehicles sold in 2025

58%

58% market share of U.S. new vehicle sales in 2025

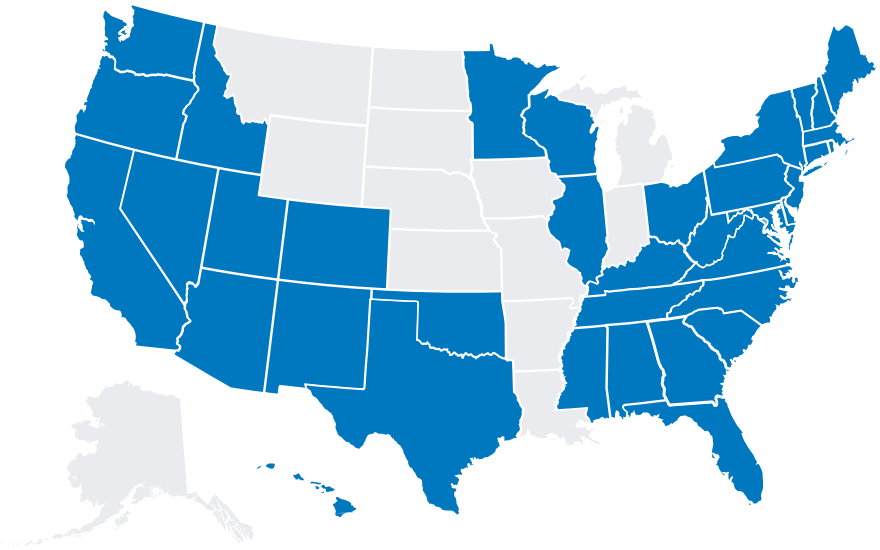
$78B

$78 billion in parts and services sold by dealerships in 2025

$4.6B

$4.6 billion in advertising expenditures by dealerships in 2025

The Majority of New Vehicles Sold in 37 States and Washington, D.C. are Made by International Automakers



Vehicles are made, built, or manufactured in the United States using domestic and globally sourced parts.

U.S. New Vehicle Sales

State	Total Sales Volume	Int'l Automakers Sales*	Int'l Automakers Market Share
Alabama	212,428	116,941	55%
Alaska	28,187	13,208	47%
Arizona	369,112	200,809	54%
Arkansas	130,839	62,456	48%
California	1,776,363	1,204,260	68%
Colorado	284,319	170,843	60%
Connecticut	152,453	109,427	72%
Delaware	46,627	27,298	59%
District of Columbia	16,430	12,353	75%
Florida	1,499,439	944,221	63%
Georgia	501,671	290,804	58%
Hawaii	69,461	48,352	70%
Idaho	73,328	39,106	53%
Illinois	569,571	333,304	59%
Indiana	254,741	124,206	49%
Iowa	123,125	49,937	41%
Kansas	103,052	50,857	49%
Kentucky	162,332	86,880	54%
Louisiana	213,182	103,883	49%
Maine	71,892	40,932	57%
Maryland	284,645	187,980	66%
Massachusetts	327,074	228,009	70%
Michigan	551,611	135,172	25%
Minnesota	233,809	120,742	52%
Mississippi	114,622	63,795	56%
Missouri	302,375	129,561	43%
Montana	61,095	26,441	43%
Nebraska	85,409	39,760	47%
Nevada	145,275	87,718	60%
New Hampshire	89,614	55,785	62%
New Jersey	511,488	350,232	68%
New Mexico	89,758	45,637	51%
New York	843,564	549,453	65%
North Carolina	459,651	277,481	60%
North Dakota	37,956	12,598	33%
Ohio	556,608	310,079	56%
Oklahoma	576,881	306,978	53%
Oregon	163,090	106,010	65%
Pennsylvania	566,392	352,081	62%
Rhode Island	52,031	35,595	68%
South Carolina	237,808	144,616	61%
South Dakota	39,925	14,643	37%
Tennessee	312,270	186,569	60%
Texas	1,650,269	866,906	53%
Utah	150,571	76,762	51%
Vermont	40,836	24,910	61%
Virginia	363,915	240,980	66%
Washington	280,870	181,487	65%
West Virginia	82,742	44,229	53%
Wisconsin	240,851	121,767	51%
Wyoming	23,663	9,393	40%
Total	**16,135,220**	**9,363,446**	**58%**

*Retail and fleet sales CY2025 for Acura, Alfa Romeo, Aston Martin, Audi, Bentley, BMW, Bugatti, Ferrari, Fiat, Honda, Hyundai, Genesis, Infiniti, Jaguar, Kia, Karma, Lamborghini, Land Rover, Lexus, Lotus, Maserati, Mazda, McLaren, Mercedes-Benz, MINI, Mitsubishi Motors, Nissan, Polestar, Porsche, Rolls-Royce, Scion, Subaru, Toyota, Volkswagen, and Volvo Cars.
Source: IHS Markit New Vehicle Registration Data

Electrified Vehicle Sales

Demand for electrified vehicles is accelerating and international automakers are leading the charge. In 2025, they accounted for more than half of all new electrified vehicle sales, marking a 26% increase year over year and reflecting strong consumer confidence in forward-looking technologies.

3.1M

3.1 million new electrified vehicles* sold in 2025

196

196 electrified vehicle models offered to U.S. consumers in 2025

66%

66% of U.S. market share electrified vehicles sold in 2025

91%

91% of U.S. hybrid sales (95 models offered)

29%

29% of U.S. battery electric vehicle (BEVs) sales (63 models offered)

100%

100% of U.S. hydrogen fuel cell electric vehicle (FCEVs) sales (3 models offered)

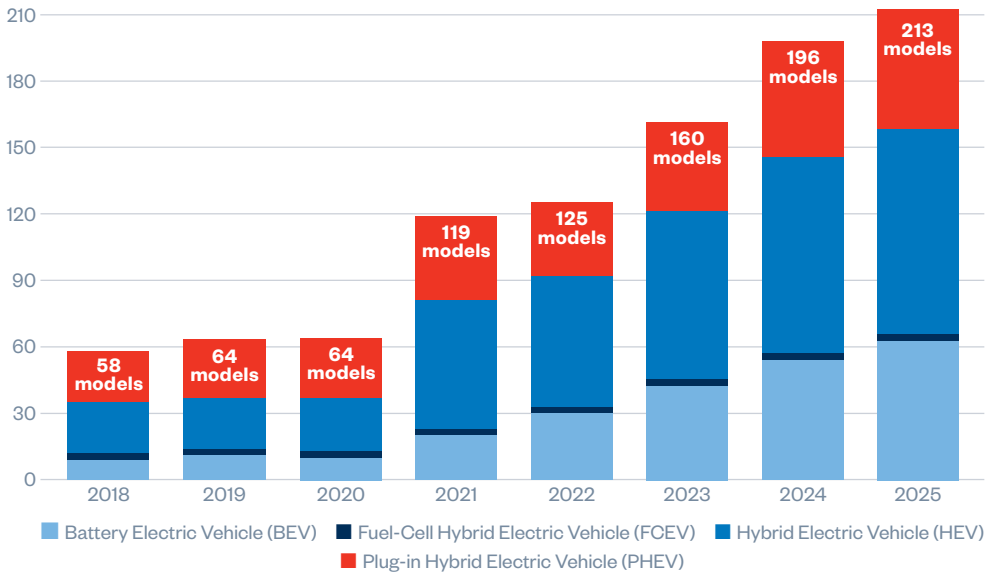
73%

73% of U.S. plug-in hybrid electric vehicle (PHEVs) sales (52 models offered)

*Advanced technology vehicles (electrified) include all battery electric vehicles (BEV), hybrid electric vehicles (HEV), plug-in hybrid electric vehicles (PHEV), and fuel cell vehicles (FCEV).

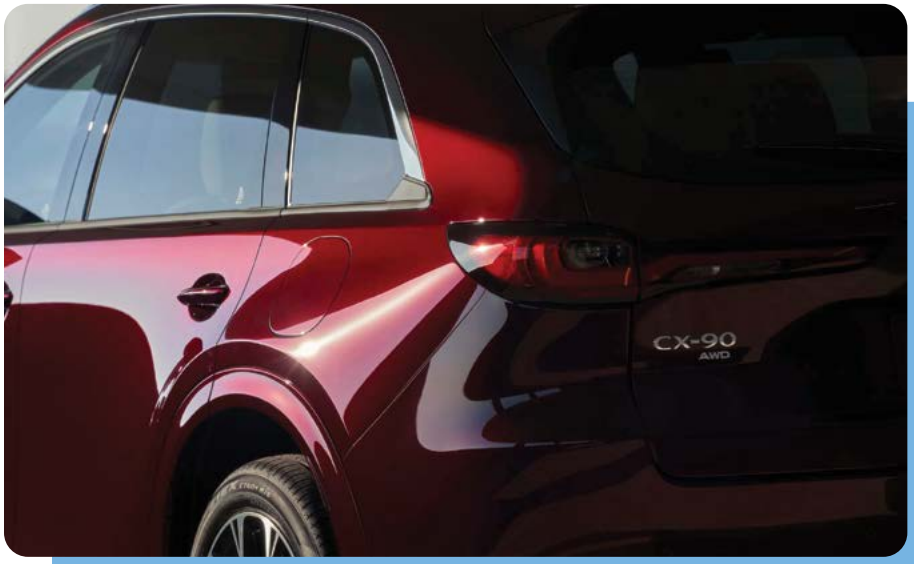
Mitsubishi made history when the Outlander and Outlander PHEV were named 2026 Green Car Journal's Family Green Car of the Year, marking the first time in the award program's 21-year history that sister models have shared the prestigious title.

International Automakers are Offering More Electrified Vehicle Options to Consumers Every Year



Source: Wards Automotive, U.S. New Vehicle Sales by Model and Powertrain, 2017-2022

Vehicles are made, built, or manufactured in the United States using domestic and globally sourced parts.



The Mazda CX-90 PHEV was named the 2025 Best Plug-In Hybrid SUV by U.S. News & World Report.

Electrified Vehicle Sales

State	Electrified Vehicle Total Sales	Int'l Automakers* Electrified Vehicle Sales	Int'l Automakers Electrified Vehicle Market Share
Alabama	40,655	31,576	78%
Alaska	4,545	3,565	78%
Arizona	97,308	69,781	72%
Arkansas	19,595	14,819	76%
California	869,574	602,792	69%
Colorado	100,189	73,394	73%
Connecticut	46,905	36,917	79%
Delaware	13,182	9,594	73%
District of Columbia	7,415	5,962	80%
Florida	423,678	296,093	70%
Georgia	125,572	86,903	69%
Hawaii	18,237	13,203	72%
Idaho	15,858	12,306	78%
Illinois	147,861	106,598	72%
Indiana	51,466	36,821	72%
Iowa	21,902	15,703	72%
Kansas	19,884	14,736	74%
Kentucky	31,067	24,088	78%
Louisiana	32,187	22,555	70%
Maine	14,236	11,252	79%
Maryland	88,925	67,779	76%
Massachusetts	102,038	79,849	78%
Michigan	124,752	43,865	35%
Minnesota	53,192	39,066	73%
Mississippi	17,498	13,899	79%
Missouri	53,406	39,242	73%
Montana	10,715	8,367	78%
Nebraska	16,241	11,523	71%
Nevada	50,485	31,390	62%
New Hampshire	19,745	16,082	81%
New Jersey	158,903	117,511	74%
New Mexico	18,554	14,013	76%
New York	231,829	180,418	78%
North Carolina	122,695	91,183	74%
North Dakota	4,498	2,941	65%
Ohio	115,155	82,786	72%
Oklahoma	57,536	48,879	85%
Oregon	58,388	43,888	75%
Pennsylvania	137,729	106,509	77%
Rhode Island	13,182	10,954	83%
South Carolina	50,277	40,054	80%
South Dakota	6,181	4,305	70%
Tennessee	60,628	43,801	72%
Texas	362,929	254,989	70%
Utah	37,527	26,140	70%
Vermont	10,240	7,970	78%
Virginia	106,325	83,610	79%
Washington	117,291	81,661	70%
West Virginia	11,289	9,212	82%
Wisconsin	47,351	35,350	75%
Wyoming	3,574	2,809	79%
Total	**4,370,394**	**3,128,703**	**72%**

*Retail and fleet sales CY2025 for Acura, Alfa Romeo, Aston Martin, Audi, Bentley, BMW, Bugatti, Ferrari, Fiat, Honda, Hyundai, Genesis, Infiniti, Jaguar, Kia, Karma, Lamborghini, Land Rover, Lexus, Lotus, Maserati, Mazda, McLaren, Mercedes-Benz, MINI, Mitsubishi Motors, Nissan, Polestar, Porsche, Rolls-Royce, Scion, smart, Subaru, Toyota, Volkswagen, and Volvo Cars.
Source: Experian Information Solutions, Inc.


2026

Automakers

International Automakers in America

Aston Martin

U.S. Headquarters:
New York, NY

U.S. Operations Established: 1964

astonmartin.com

Aston Martin Lagonda of North America, Inc.
11 West 42nd Street
Floor 22
New York, NY 10036
T 866.278.6661

BMW Group

U.S. Headquarters:
Woodcliff Lake, New Jersey

U.S. Operations Established: 1975

Brands: BMW, MINI, Rolls-Royce, and BMW Motorrad

bmwusa.com

BMW Group Government and External Affairs
200 Massachusetts Ave, NW
Suite 650
Washington, D.C. 20001

Ferrari

U.S. Headquarters:
Englewood Cliffs, New Jersey

U.S. Operations Established: 1990

ferrari.com

Ferrari North America, Inc.
250 Sylvan Avenue
Englewood Cliffs, NJ 07632
T 201.816.2600

Honda

U.S. Headquarters:
Torrance, California

U.S. Operations Established: 1959

Brands: Honda and Acura

hondainamerica.com

American Honda Motor Co., Inc.
Government & Industry Relations
1001 G Street, NW
Suite 950
Washington, D.C. 20001

Hyundai

U.S. Headquarters:
Fountain Valley, California

U.S. Operations Established: 1985

Brands: Hyundai and Genesis

hyundaiusa.com

Hyundai Motor Company
Washington Office
660 N. Capitol Street, NW
Suite 800
Washington, D.C. 20001
T 202.629.1555

Jaguar Land Rover

U.S. Headquarters:
Mahwah, New Jersey

U.S. Operations Established: 2001

jaguarlandrover.com

Jaguar Land Rover
Government Relations
100 Jaguar Land Rover Way
Mahwah, NJ 07495
T 201.818.8500

Kia

U.S. Headquarters:
Irvine, California

U.S. Operations Established: 1992

kia.com

Kia Corporation
Government Affairs
660 N. Capitol Street, NW
Suite 800
Washington, D.C. 20001
T 202.629.1555

Maserati

U.S. Headquarters:
Auburn Hills, Michigan

U.S. Operations Established: 2001

maseratiusa.com

Maserati North America, Inc.
1 Chrysler Drive
Auburn Hills, MI 48326
T 877.696.2737

Mazda

U.S. Headquarters:
Irvine, California

U.S. Operations Established: 1970

mazdausa.com

Mazda North American
Operations Government and
Public Affairs
1025 Connecticut Avenue, NW
Suite 910
Washington, D.C. 20036

McLaren

U.S. Headquarters:
Coppell, Texas

U.S. Operations Established: 2010

cars.mclaren.com

McLaren Americas
1405 S Belt Line Rd
Suite 100
Coppell, TX 75019
T 855.202.8815

Mercedes-Benz

U.S. Headquarters:
Sandy Springs/Atlanta, Georgia

U.S. Operations Established: 1965

group.mercedes-benz.com

Mercedes-Benz North America
External Affairs
1000 Maine Avenue, SW
#915
Washington, D.C. 20024
T 202.341.8907

Mitsubishi Motors

U.S. Headquarters:
Franklin, Tennessee

U.S. Operations Established: 1981

mitsubishicars.com

Mitsubishi Motors North America, Inc.
Government and Industry Relations
4031 Aspen Grove Drive
Suite 650
Franklin, TN 37067
T 202.924.8221

Nissan

U.S. Headquarters:
Franklin, Tennessee

U.S. Operations Established: 1958

Brands: Nissan and Infiniti

nissanusa.com

Nissan North America, Inc.
Government Affairs
1 Nissan Way
Franklin, TN 37067
T 615.725.1000

Subaru

U.S. Headquarters:
Camden, New Jersey

U.S. Operations Established: 1968

subaru.com

North American Subaru, Inc.
Government Relations
1001 G Street, NW
Suite 300 East
Washington, D.C. 20001
T 856.488.8500

Toyota

U.S. Headquarters:
Plano, Texas

U.S. Operations Established: 1958

Brands: Toyota and Lexus

toyota.com

Toyota Motor North America,
Inc. Government Affairs
325 7th Street, NW
Suite 1000
Washington, D.C. 20004
T 202.463.6800

Volkswagen Group of America

U.S. Headquarters:
Reston, Virginia

U.S. Operations Established: 1955

Brands: Volkswagen, Audi, Bentley, Bugatti, and Lamborghini

volkswagengroupofamerica.com

Volkswagen Group of America
Public Affairs
601 Pennsylvania Avenue, NW
Suite 740
Washington, D.C. 20004
T 202.899.1000

Volvo Cars

U.S. Headquarters:
Mahwah, New Jersey

U.S. Operations Established: 1955

volvocars.com/us

Volvo Car Corporation
Government Affairs
T 202.412.5935

Autos Drive America®

AIADA®
American International Automobile Dealers Association

Sources used to compile the data in this report:

- The 2026 Autos Drive America and AIADA Economic Impact Survey
- AIADA's membership roster
- NADA DATA
- WardsAuto InfoBank
- IHS Markit New Vehicle Registration Data

Automobile manufacturers participating in the 2026 Autos Drive America and AIADA Economic Impact Survey:

- BMW Group
- Honda
- Hyundai
- Kia
- Mazda
- Mercedes-Benz
- Mitsubishi Motors
- Nissan
- Subaru
- Toyota
- Volkswagen Group
- Volvo Cars

Indirect economic impacts for the U.S. and each state derived by SCOUT Economics using direct employment, dealer employment, and auto parts employment multipliers from models of the 2024 economy.

Vehicles are made, built, or manufactured in the United States using domestic and globally sourced parts.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/AIADA.News
@AIADA_News
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