

Alabama Automotive Industry Update

2010 Southern Automotive Conference



Auto Assembly Plant Locations in the South: 1983-2008





General Motors
Bowling Green, KY
Opened: 1981



Toyota
Blue Springs, MS
Opening: 2010



General Motors
Shreveport, LA
Opened: 1978



Nissan
Canton, MS
Opened: 2003



Mercedes-Benz
Vance, AL
Opened: 1997



Ford
Louisville, KY
Opened: 1955

Toyota
Georgetown, KY
Opened: 1988

Nissan
Smyrna, TN
Opened: 1983

Volkswagen
Chattanooga, TN
Opening: 2010
Facility is manufacturing a new
midsize sedan.



BMW
Spartanburg, SC
Opened: 1994



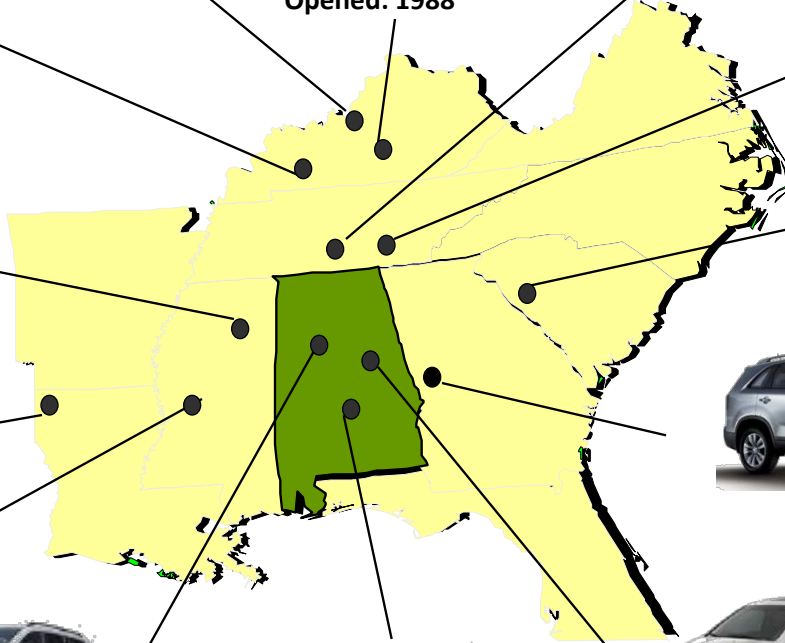
Kia
West Point, GA
Opening: 2009



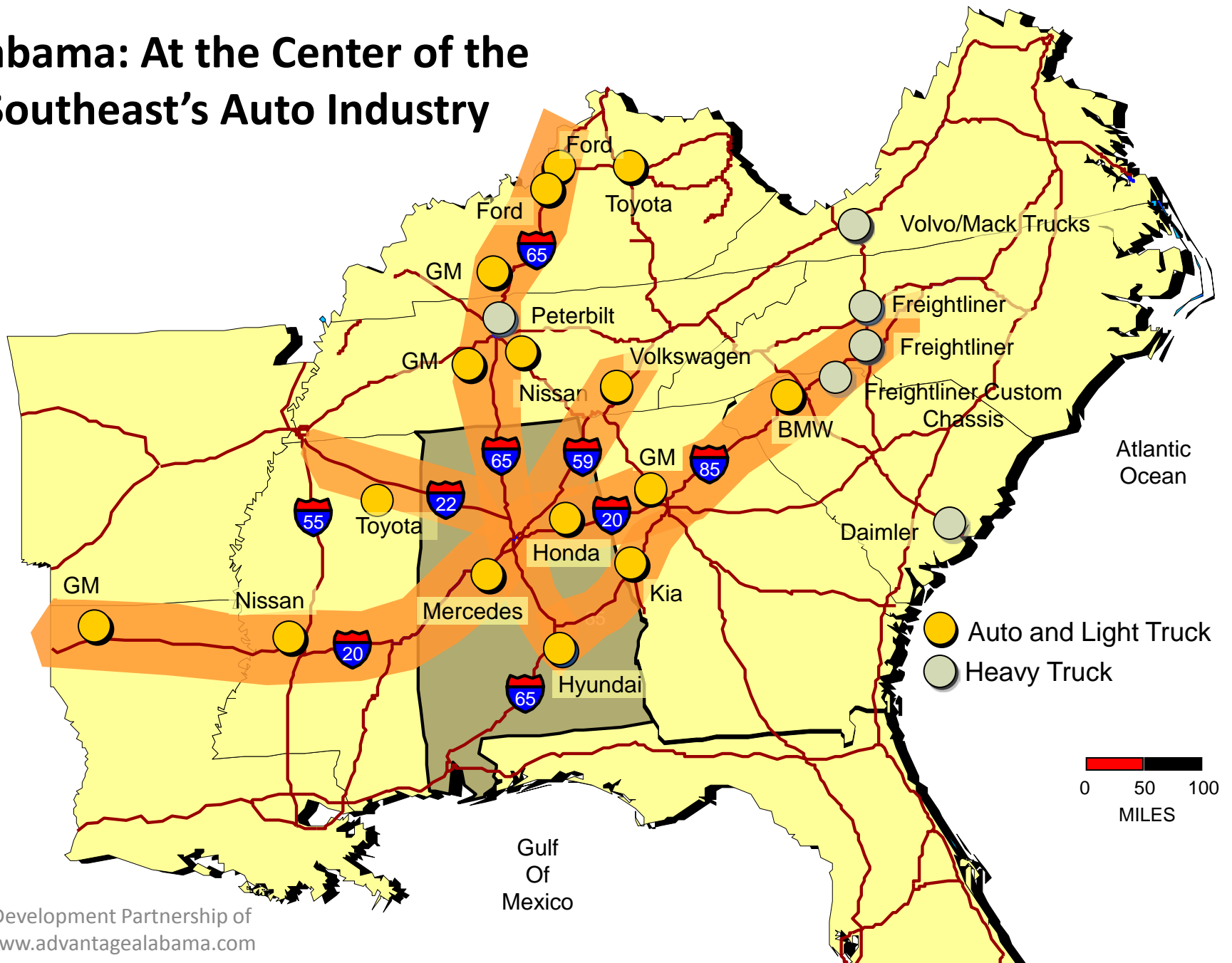
Hyundai
Montgomery, AL
Opened: 2005
Production of the Elantra
to begin late in 2010



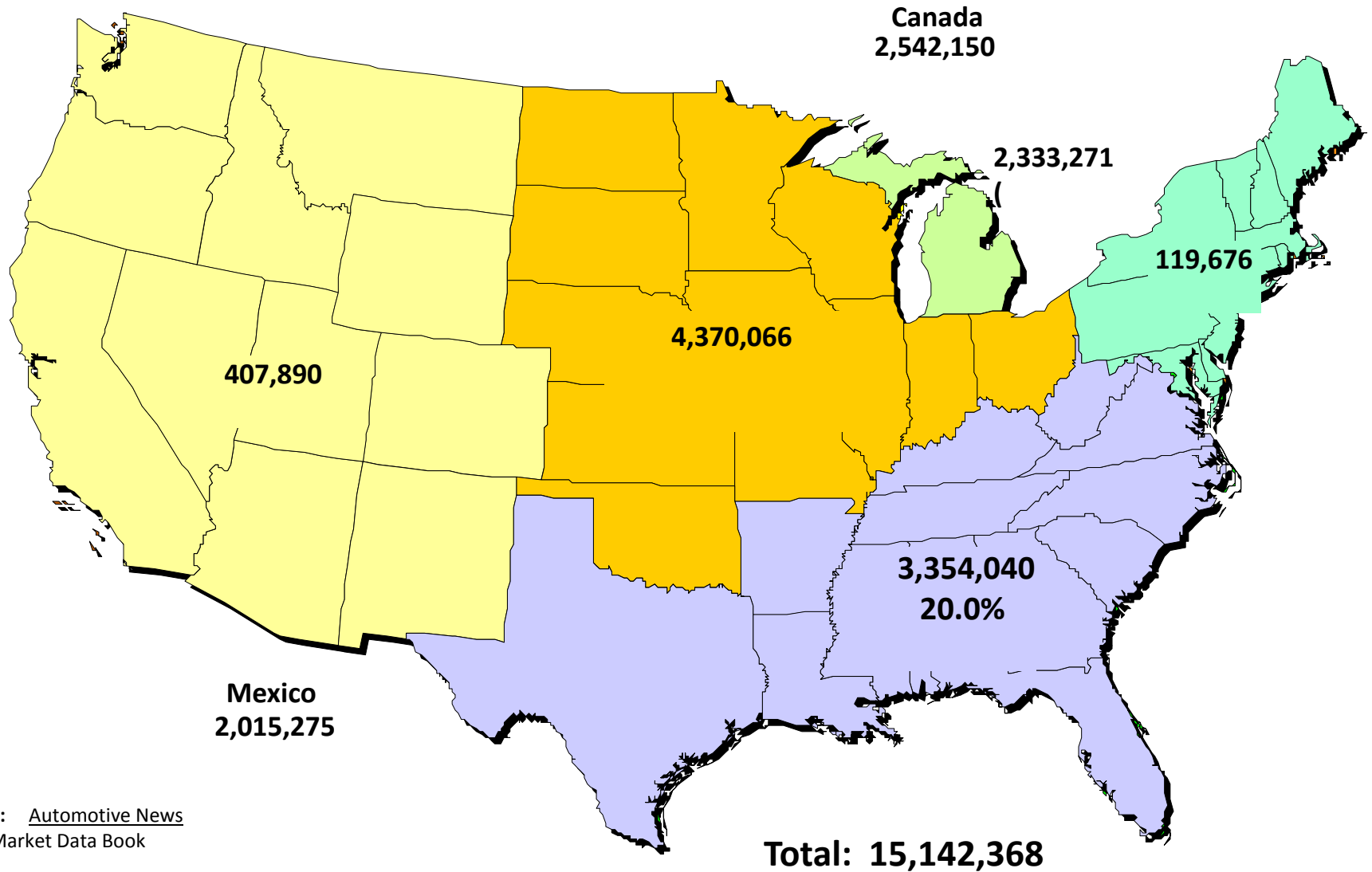
Honda
Lincoln, AL
Opened: 2001
Production in 2009 to include the
Ridgeline truck and Accord sedan



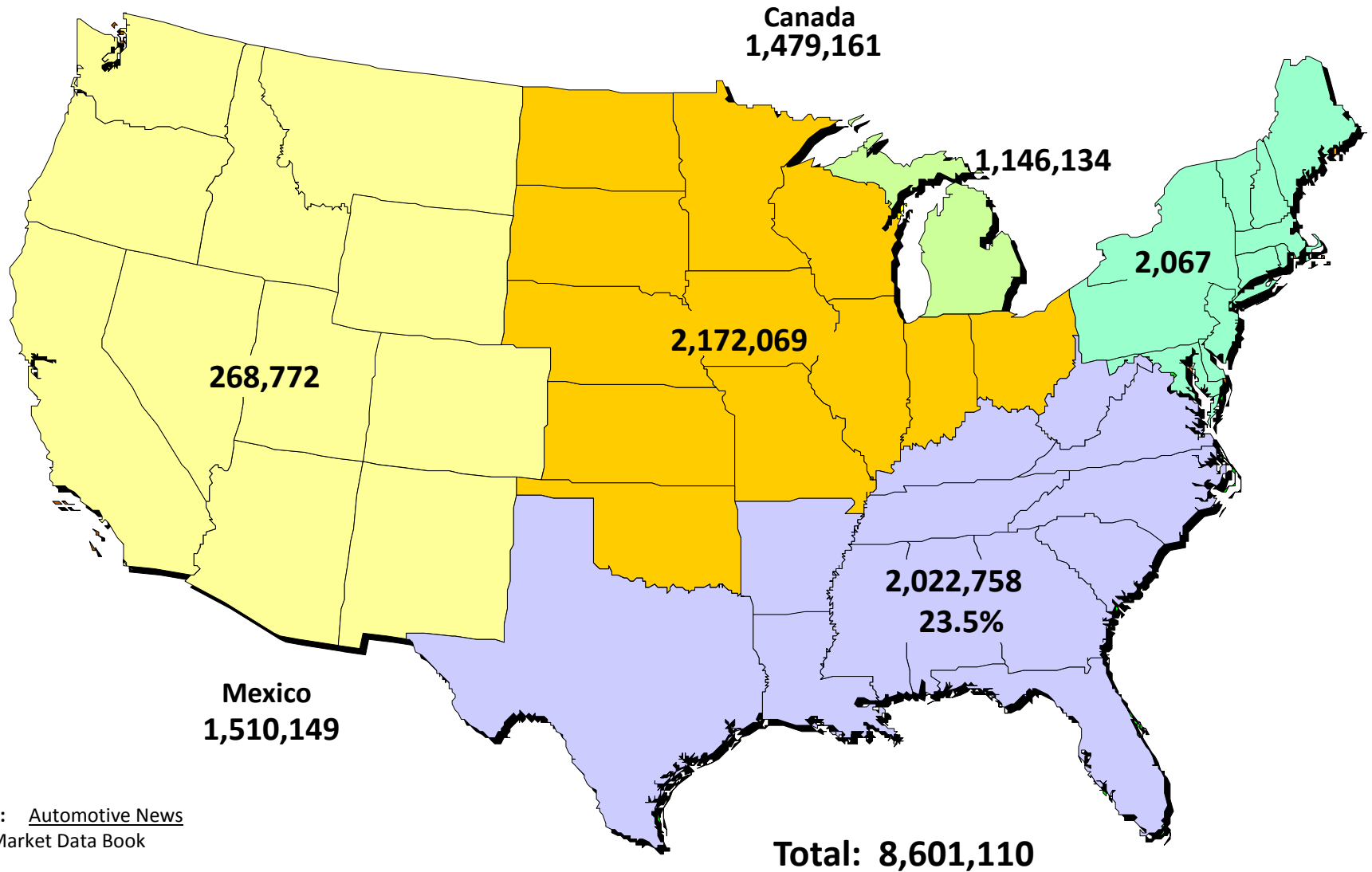
Alabama: At the Center of the Southeast's Auto Industry



2007 North American Auto and Light-Truck Production By Region



2009 North American Auto and Light-Truck Production By Region

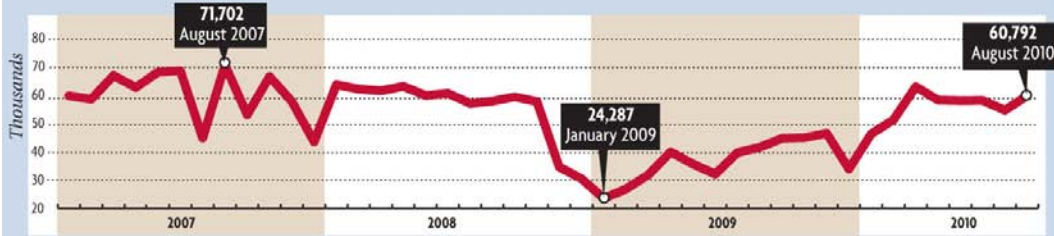


Alabama Auto Production

Year	Total Production
1998	68,800
2004	252,000
2005	479,000
2006	698,000
2007	738,000
2008	672,102
2009	467,817

TRACKING ALABAMA'S AUTO INDUSTRY

PRODUCTION AT ALABAMA'S THREE AUTO PLANTS HAS REBOUNDED FROM A LOW IN EARLY 2009



FLAGSHIP MODELS have seen sharp production increases



MERCEDES-BENZ M-CLASS

Production
 Aug. '09: 5,679
 Aug. '10: 8,384 **48%**

Sales
 Aug. '09: 2,577
 Aug. '10: 2,473 **4%**



HONDA ODYSSEY

Production
 Aug. '09: 7,220
 Aug. '10: 10,662 **48%**

Sales
 Aug. '09: 8,904
 Aug. '10: 9,306 **4.5%**



HYUNDAI SONATA

Production
 Aug. '09: 9,784
 Aug. '10: 26,287 **169%**

Sales
 Aug. '09: 11,815
 Aug. '10: 21,399 **81%**

YEAR-TO-DATE SALES for all Alabama-built models compared to '09



Note: Honda also builds the V-6 Accord sedan in Alabama, but the automaker does not provide a sales breakdown for that model. Most Honda production stats do not include the Accord.

Source: Automotive News Data Center and the automakers

NEWS STAFF

Jan. - Aug. '09: 280,718

Jan. - Aug. '10: 465,529

66% Increase

The Birmingham News
 Sept. 23, 2010

Passenger Vehicles Produced in Alabama



Mercedes M-Class



Mercedes GL



Mercedes R-Class



Honda Odyssey



Honda Pilot



Hyundai Sonata



Honda Ridgeline



Honda V6 Accord



Hyundai Elantra

U.S. Car & Light Truck Production By State

<u>2009 Rank</u>	<u>State</u>	<u>2009</u>	<u>2008</u>	<u>2007</u>	<u>2006</u>
1	Michigan	1,146,134	1,852,654	2,333,271	2,279,672
2	Ohio	783,462	1,484,086	1,748,335	1,669,741
3	Kentucky	649,422	780,727	1,046,531	1,069,926
4	Indiana	536,198	594,125	692,899	657,531
5	Alabama	467,817	672,277	739,019	698,086
6	Missouri	466,722	680,424	906,270	984,353
7	Tennessee	288,006	353,962	455,422	699,352
8	California	268,772	342,041	407,890	428,633
9	Texas	259,494	252,885	324,089	237,010
10	Mississippi	181,437	232,879	292,671	278,464
11	Illinois	174,912	425,817	542,368	470,322

Top States for Supplier Jobs

State	'06 Direct Jobs	'09 Direct Jobs	Change
Michigan	145,818	111,224	(34,594)
Ohio	97,323	80,600	(16,723)
Indiana	86,934	66,721	(20,213)
Tennessee	45,749	44,172	(1,577)
Illinois	40,063	36,033	(4,030)
Kentucky	35,102	34,656	(446)
North Carolina	27,589	26,078	(1,511)
California	28,596	24,677	(3,919)
Texas	20,175	24,677	4,489
Alabama	15,965	21,654	5,689
New York	31,017	20,367	(10,650)
S. Carolina	20,943	19,492	(1,451)
Missouri	18,888	17,828	(1,060)
Wisconsin	21,502	17,662	(3,840)
Georgia	22,701	16,165	(6,536)

Source: Original
Equipment Suppliers
Association (OESA)

2010 Automotive Expansions and New Investment in Alabama

New Projects

AP Plasman
Daeil USA
Faurecia North America
Fehrer Automotive
Glovis
Pilkington
Viper Motorcycle

Expansions

Cullman Yutaka
BLG Logistics
Brose Tuscaloosa
Gestamp Alabama
Hoerbiger Automotive Comfort Systems
Pyongsan America
SaeHaeSung Alabama
Sanoh America
SL Alabama

Alabama Robotics Technology Park



\$71 Million Investment
Opens November 10, 2010



- Three Training Facilities, Each Targeted to a Specific Industry Need
- Three Phases:
 - Training for Industry
 - R&D and Testing for Robotics Companies
 - Entrepreneurial Center to build and adapt robots for new industries

Mercedes-Benz U.S. International (MBUSI)

Location / Production Start: Tuscaloosa Co. / 1997

Capital Investment: \$1.3 Billion

Employees: 2,800 team members

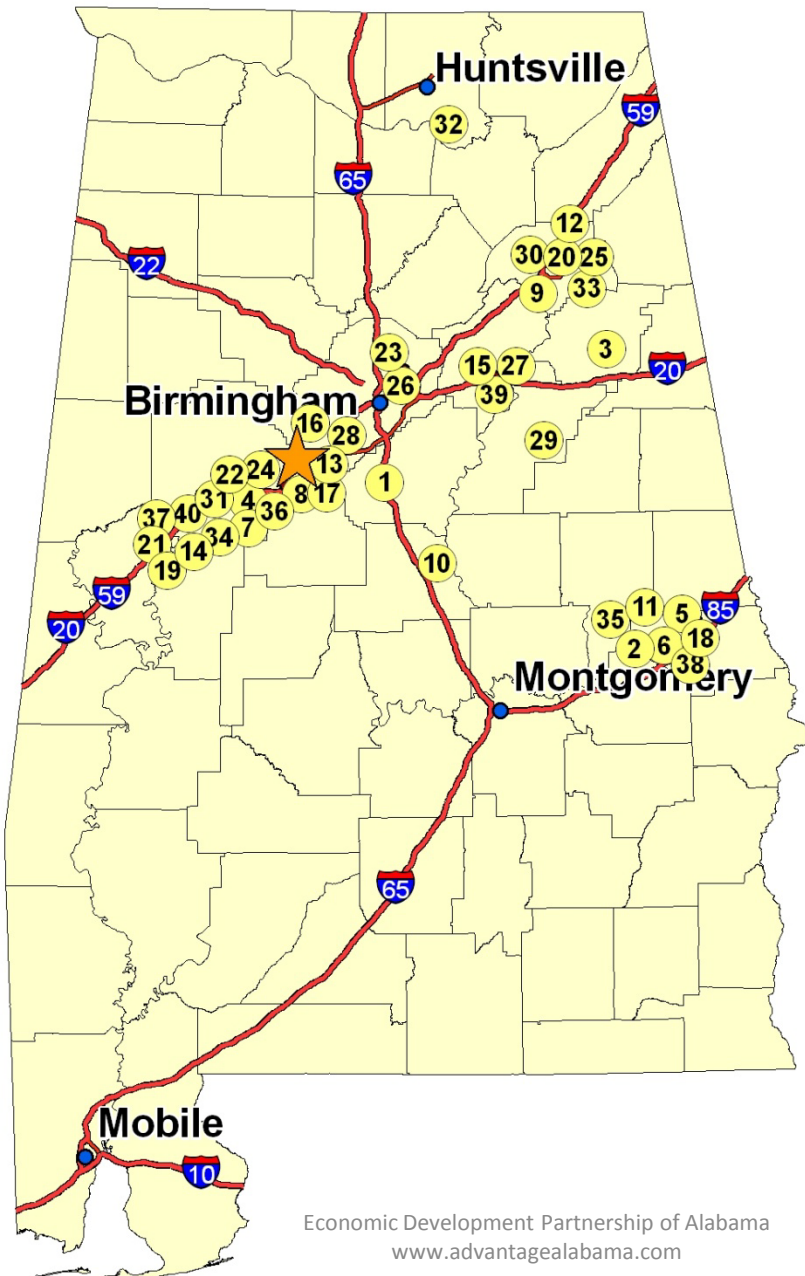
Plant Size: 3 million (+) square feet

Products: M-Class, R-Class, GL-Class

Future Product: C-Class



Mercedes Suppliers in Alabama



ID	Company	Product(s)
1	AGC Automotive Americas	Windshield Glass
2	Aluminum Technology Schmid	Precise Machining of Aluminum Parts
3	AmPro Anniston	Custom Thermoplastic Injection Molded Parts
4	ARD Logistics-Alabama	Seat Subassemblies
5	Benteler Automotive Corporation	Chassis Systems
6	Borbet Group	Aluminum Alloy Wheels
7	Borgers USA Corporation	Rear Interior Trim and Floor Panels
8	Brose Tuscaloosa	Interior Door Modules
9	Choice Fabricators	Metal Stamping; Welding; Coating and Fabrication
10	CRH North America	Seat Adjuster Systems
11	Cylpro Automotive Products	Aluminum Cylinder Housings
12	Decatur Plastic Products	Flocking
13	Decoma Systems Integration Group	Bumpers
14	Eberspäecher N.A., Inc.-Tuscaloosa	Exhaust Systems
15	Eissmann Group Automotive	Dashboards; Interior Leather Components
16	Flex-N-Gate	Grill Guards; Spare Tire Carriers; Hitches; Skid Plates
17	Gestamp Corporation	Stamped Underbody Assemblies
18	Hoerbiger Automotive Comfort Systems	Power Liftgates
19	Inteva Products, LLC	Cockpit Modules
20	Inteva Products, LLC	Consoles; Arm Rests; Glove Boxes
21	ISE Innomotive Systems U.S.	Front/Rear Body Modules; Chassis Parts
22	Johnson Controls	Seats; Overhead Systems; Door Panels; Hard Trim
23	Kamtek Inc.	Side Panels; Doors; Hoods; Tailgates; Fenders
24	Kautex Textron Alabama	Fuel Tanks
25	Mid-South Electronics	Console Parts; Interior Trim; Mechanical Assemblies
26	MISA Metal Blanking	Sheet Metal Stamping Blanks
27	Oerlikon Balzers	Automotive Tool Coatings
28	Plastech Engineered Products	Interior and Exterior Plastic Parts
29	PPG Industries	Windshields; Rear Glass; Front Windows
30	Prince Metal Stampings USA	Stampings; Engine/Structural Parts
31	Recticel North America	Interior Door Panels
32	Ridgeview Industries	Brackets; Stamped Subassemblies
33	Stamped Products	Window Regulator Rails
34	Stankiewicz International	Acoustical Components; Wheel Wells and Flooring Systems
35	Straehle + Hess USA, Inc.	Headliners, Pillars and Seat Coverings
36	TW-Fittings-N.A.	Wheel and Tire Assemblies
37	Visteon Corporation	Injection Molded Plastics
38	Weidmann Plastics Technology North America	Scuff Plates
39	WKW Erbsloeh Automotive GmbH	Window Trim and Pillar Covers
40	ZF Lemförder Corporation	Axles

Honda Manufacturing Of Alabama (HMA)

Location / Production Start: Lincoln / 2001

Capital Investment: \$1.4 billion

Employees: 4,000 associates

Plant Size: 3.5 million sq. ft.

**Products: Odyssey, Pilot, Accord,
Ridgeline / V6 engines**



Honda Suppliers in Alabama



ID	Company	Product(s)
1	AGC Automotive Americas	Glass; AC Subassemblies
2	Alabama Cullman Yutaka Technologies	Torque Converters and Exhaust System Parts
3	AmPro Custom Molding	Interior Trim and Seat Parts
4	Atlantic Tool & Die Alabama	Brackets
5	Bermco Aluminum	Aluminum Alloys
6	Bridgewater Interiors	Seats
7	Choice Fabricators	Seat Frame/Fuel Tank Components
8	Cumberland Plastic Systems, LLC	Injection Molding; Plastic Components Assembly
9	Daewon America	Suspension Bars and Coils
10	Fleetwood Metal Industries	Stamped/Welded Steel Parts
11	Flex-N-Gate	Grill Guards; Spare Tire Carriers; Hitches; Skid Plates
12	HFI, Inc.	Headrests and Armrests
13	HL-A Company	Lockset Assemblies
14	Jay Mid-South	Metal Seat Frames
15	KTH Leesburg Products	Vehicle Frames
16	Kumi Manufacturing Alabama	Interior and Exterior Parts
17	MATSU Alabama	Metal Stampings
18	Merryweather Foam	Foam Components
19	MISA Metal Blanking, Inc.	Sheet Metal Stamping Blanks
20	M-Tek Alabama	Interior Molded Parts/Assemblies
21	Nemak	Aluminum Cylinder Heads and Engine Blocks
22	New South Express, LLC	Part Consolidation; Warehousing and Sequencing Center
23	Nippon Oil Lubricants (America)	Engine Oils; Transmission/Steering Fluids
24	North American Lighting, Inc.	Automotive Tail Lamps
25	Oerlikon Balzers	Automotive Tool Coatings
26	Piqua Technologies	Noise Vibration Seals/Gaskets
27	PPG Industries	Front Glass Assemblies
28	Precision Strip	Steel Strips and Processing
29	Rainsville Technology	Molded Plastic Parts
30	Robinson Foundry, Inc.	Castings for Powertrains and Chassis; Brackets and Knuckles
31	Sanoh America, Inc.	Fluid Handling Systems
32	Stamped Products	Door and Seat Components
33	Sumitomo EWS Alabama	Electrical Wiring Harnesses
34	T & C Stamping	Mounting Brackets
35	Topre America Corporation	Stampings; Subassemblies
36	Trans Tron Limited	Cruise Control Assemblies
37	TS Tech Alabama	Seats
38	Yachiyo Manufacturing of Alabama	Roof and Spare Tire Assemblies

Hyundai Motor Manufacturing Alabama (HMMA)

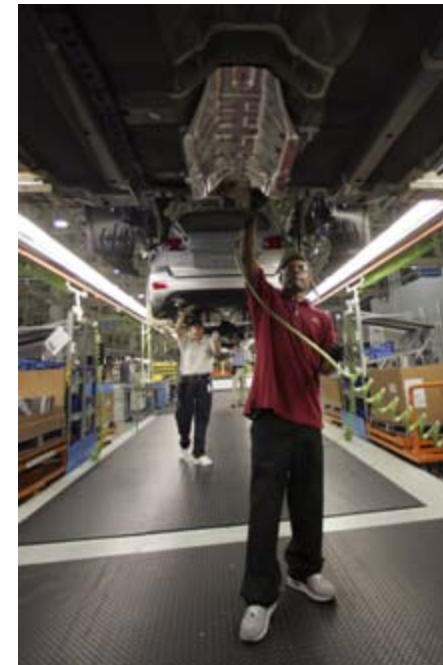
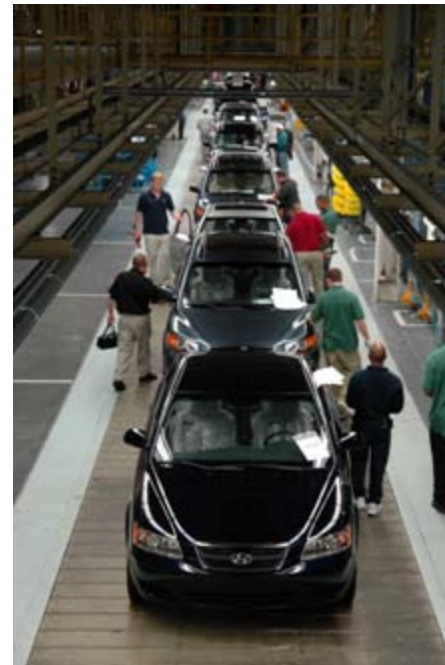
Location / Production Start:
Montgomery / 2005

Capital Investment: \$1.4 billion

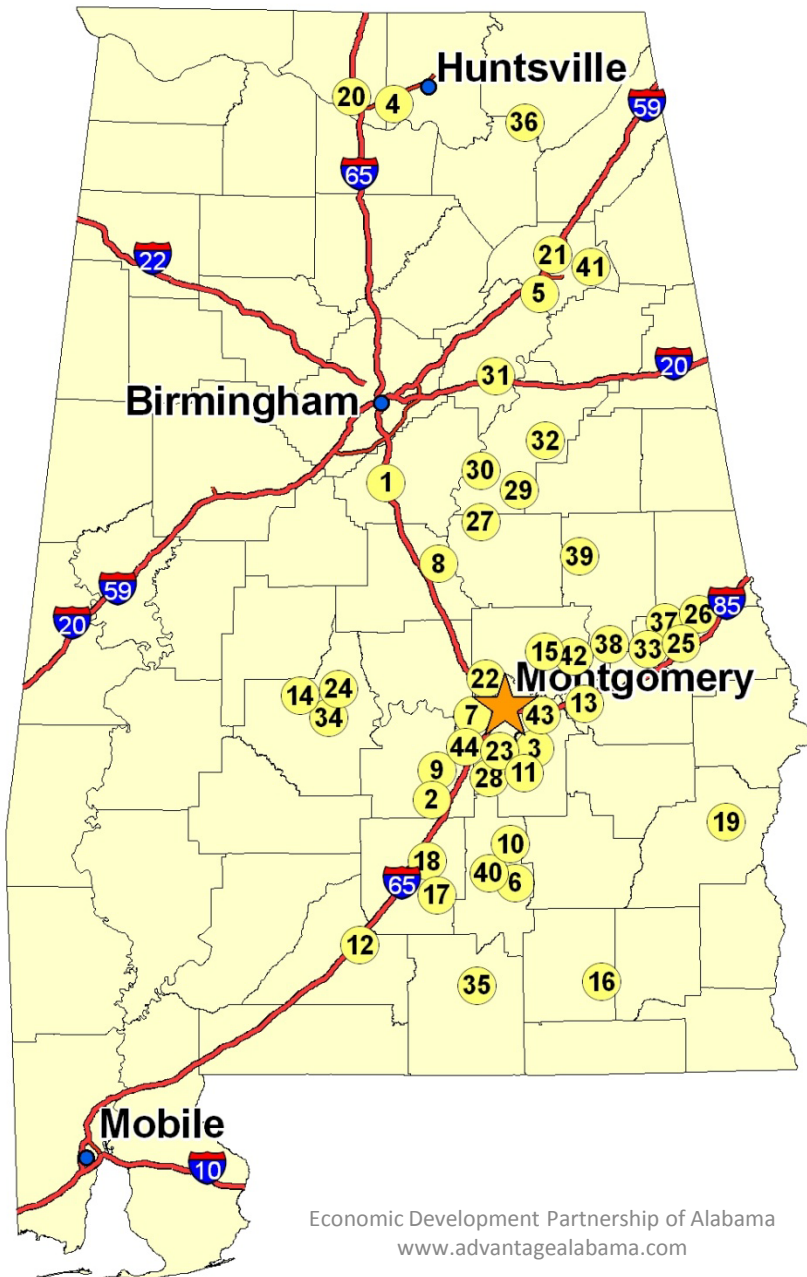
Employees: 3,300 team members

Plant Size: 2 million sq. ft.

**Products: Sonata sedan,
Elantra sedan; V6 and 2.0 liter engines**



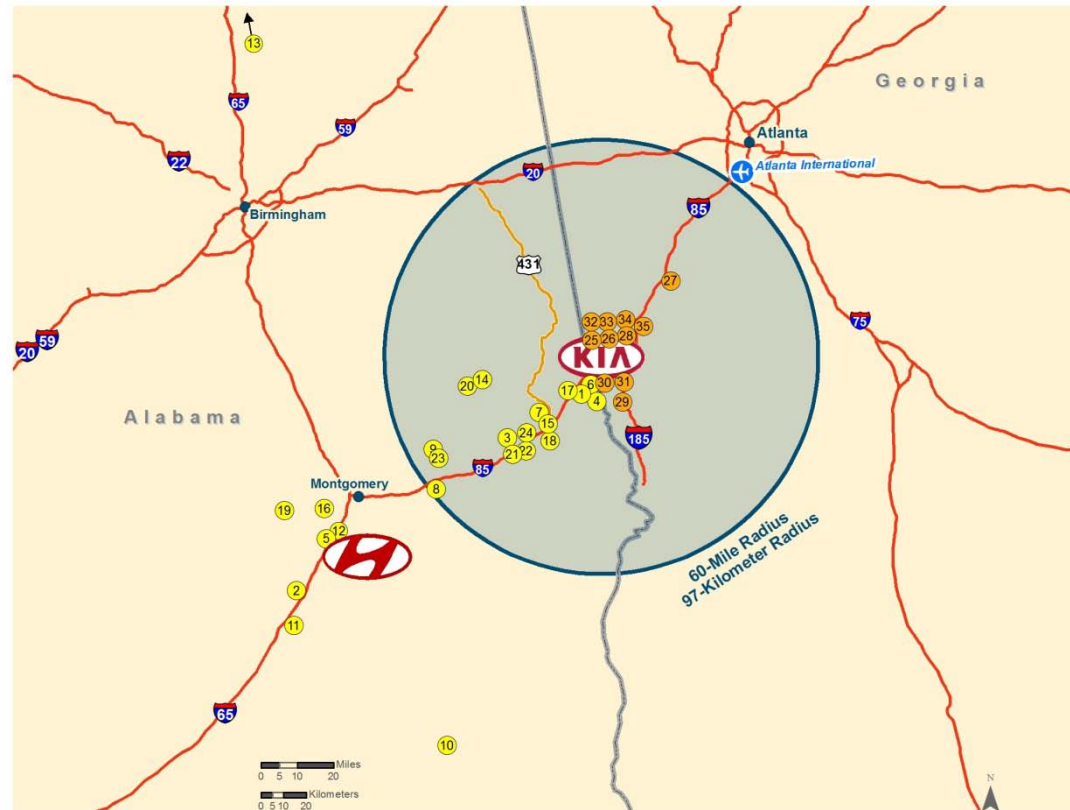
Hyundai Suppliers in Alabama



ID	Company	Product(s)
1	AGC Automotive Americas	Glass (Santa Fe)
2	ArvinMeritor Sejong, LLC	Door Modules
3	ArvinMeritor, Inc.	Mufflers; Catalytic Converters
4	BASF	Catalytic Converter Systems
5	Choice Fabricators, Inc.	Stamped Seat Components
6	CHOWEL Weldparts, Inc.	Welding Electrodes
7	Collins & Aikman - Mobis	Instrument Panels
8	CRH North America	Seat Adjuster Systems
9	Daehan Solutions Alabama, LLC	Interiors; Acoustic Insulation; Sun Visors
10	Dongwon Autopart Technology Alabama, LLC	Door Frames; Side Impact Bars
11	Glovis America, Inc.	Finished Vehicle Logistics Services
12	Guyoung Tech, USA	Stamping, Welding and E-Coating
13	Halla Climate System (Alabama) Co., Ltd	Front-End Modules; HVAC Assemblies
14	Hanil E-Hwa Interior Systems Alabama, LLC	Interior Trims, Moldings, Head Linings
15	Hanil USA	Fuel System Tube Components
16	HS Automotive Alabama, Inc.	Weather Stripping; Tubing; Hoses
17	Hwashin America Corporation	Chassis; Drivetrains; Auto Body Parts
18	Hysco America Corporation	Steel Sheetting; Coil Processing
19	Hyundai Polytech America Company, Inc.	Anti-Vibration Rubber/Thermoplastic Parts
20	Inteva Products, LLC	Steering Half Shafts
21	Jay Mid-South, LLC	Seat Frames
22	JCI	Center Floor Consoles; Interior Trim
23	Lear Montgomery	Seats
24	Lear-Kyungshin Sales and Engineering LLC	Wire Harnesses
25	Mando America Corporation	Brake, Steering, & Suspension Systems
26	Maxforma Plastics, LLC	Bumper Back Beams; Bumper Cores
27	Merryweather Foam, Inc.	Dashboard Foam Components
28	Mobis Alabama, LLC	Chassis; Cockpits; Injection Molding
29	Nemak	Engine Heads; Cylinders
30	Nippon Oil Lubricants (America), LLC	Engine Oils; Transmission/Steering Fluids
31	Oerlikon Balzers	Tool Coatings
32	PPG Industries, Inc.	Glass (Sonata)
33	Pyongsan America, Inc.	Hoses; Tubes; Heater Core Units
34	Renosol Seating Properties, LLC	Seat Padding
35	SaeHaeSung Alabama Corporation	Welding and Stamping Parts
36	Sanoh America, Inc.	Brake and Fuel Lines
37	SCA, Inc.	Climate Control Unit Components
38	Seoil America Incorporated	Sealants; Undercoatings
39	SL Alabama, LLC	Lighting Parts/Systems; Gear Shifts
40	SMART Alabama, LLC	Tailgates; Hoods; Sunroofs
41	Stamped Products, Inc.	Seat Components
42	Sung Won Elec-Comm Corporation	Electronic Panels and Communication Systems
43	Sungwoo USA Corporation	Batteries
44	T&W of Montgomery, LLC	Tire and Wheel Assemblies

Kia Impact In Alabama

Alabama		
ID	Company	Description
1	A-Jin USA	Metal Stamping
2	ArvinMeritor Sejong LLC	Mufflers and exhaust systems
3	Cumberland Plastics Systems	Injection molded products
4	Daedong Hi-Lex of America, Inc	Door Hardware System Modules
5	Daehan Solutions Alabama LLC	Interior sound insulation sound components
6	Daeki America	Auto filtration systems: air cleaners, canisters, fuel filters, and air elements
7	Daewon American	Suspension bars and coils
8	Halla Climate Systems Alabama	HVAC units and front end modules
9	Hanil USA	Plastic and steel tube assembly for vehicle fuel systems
10	HS Automotive Alabama, Inc.	Weather stripping, tubing and rubber hoses
11	Hwashin America Corporate	Chassis & Drive Train
12	Hyundai Motor Manufacturing Alabama LLC	New engine plant
13	JIT Industries	Hydraulic cyclinders
14	KwangSung America Corp	Blow plastic tubing for auto ventilation systems
15	Mando America Corporation Alabama	Braking steering and suspension systems
16	Mobis Alabama	Motor vehicle chassis, plastic injection molding and distribution
17	MP-Tech	Plastic injection molding
18	Prolific Plastics	Injection Molding
19	Saudi Basic Industries Corporation (SABIC)	Engineered plastics
20	Sejin Alabama	Plastic injection molded automotive parts, vehicle spoilers and interior consoles
21	Seohan Auto USA	Automotive front and rear axle assembly
22	Seohan-NTN Driveshaft USA	Automotive drive shaft assembly
23	Seoil America Inc.	Automotive adhesives and sealants
24	SMI Auto USA	The company specializes in all work in stamping facilities. Services include machine maintenance, installation, commissioning, and total engineering
Georgia		
ID	Company	Description
25	Daehan Solution	NVH (noise, vibration and harshness) system engineering and interior components
26	DaeLim USA	Injection mold and assembly plant
27	Dongwon Autopart Technology	door frames, side impact beams, roof molding, side absorbers and cross bars
28	Glovis Georgia	Logistic Facility (just in time mfg)
29	Johnson Controls	Seating systems (entire seat)
30	Kyungshim	Wire harnesses
31	Mobis GA, LLC	front-end modules, front rolling; chassis modules, rear-chassis modules and cockpit modules, as well as front and rear bumpers
32	Power Tech	Transmission
33	Pretty Products	Floor mats
34	Sejong Georgia LLC	Muffler and exhaust systems
35	Sewon Precision	Stamped components & decorative trim

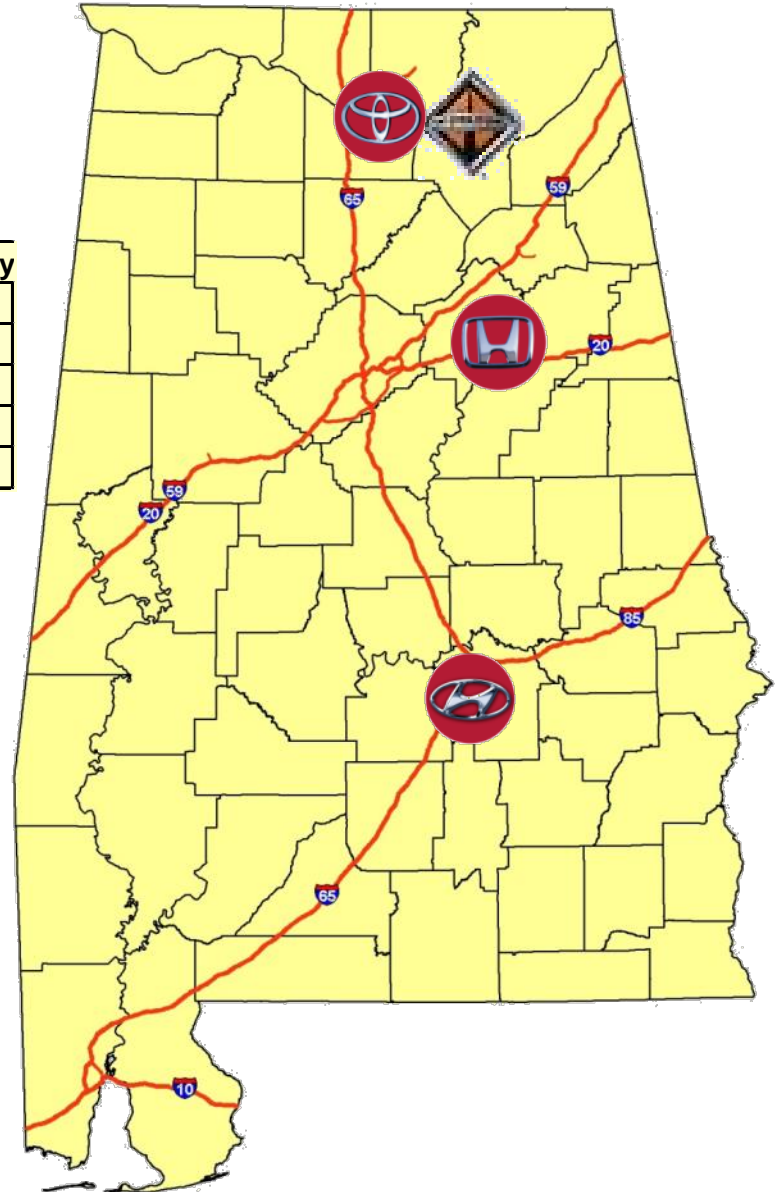


Several suppliers for KIA have announced new locations in Alabama.

Additionally, several existing Hyundai suppliers are expanding operations to supply KIA as well.

Automotive Engine Plants in Alabama

Company	Engines Produced	Annual Capacity
Honda	V-6 Minivan & SUV	300,000
Navistar Diesel	V-6 & V-8 Diesel SUV, Truck & Van	150,000
Hyundai	V-6 and 2.0 liter	300,000
Toyota	V-6 & V-8 Truck	400,000
Total		1,150,000



Toyota Motor Manufacturing of Alabama (TMMAL)

Location / Production Start: Huntsville / 2003

Capital Investment: \$514 million

Employees: 800 team members

**Production Capacity: 400,000 engines
annually**

Plant Size: 800,000 sq. ft.

**Products: V6 engines for Tundra
and Tacoma pickups; V8 engines
or Tundra and Sequoia SUV**

Future Product: 4 cylinder engines



Navistar Diesel of Alabama

Location/Production Start: Huntsville / 2001

Employees: 335

Production Capacity: 150,000 Engines Annually

**Plant Size: 700,000 square feet (first plant)
300,000 square feet (second plant)**

Products: V6 & V8 Diesel Engines



