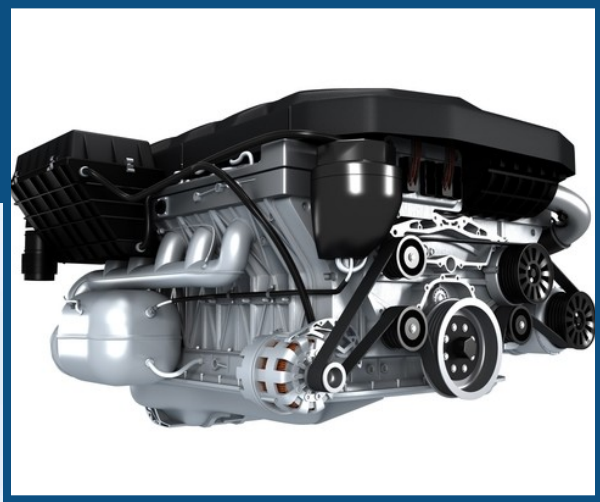


Automotive Manufacturing

The motor vehicle industry (NAICS 3361) includes manufacturers vehicle chassis and/or complete automobiles, light & heavy trucks, and utility vehicles.

The motor vehicle body and trailer industry (NAICS 3362) comprises establishments that manufacture vehicle bodies and trailers, but not chassis or other parts.

The motor vehicle parts industry (NAICS 3363) includes manufacturers of automotive engines, transmissions, brakes, interior trim, suspension components, and other parts.



Texas Industry Totals

Firms	476
Employment	33,818
Average Annual Wage	\$50,572
Total Capital Investments	\$220.9 million
Value Added Per Employee	\$70,790
Value of Shipments	\$27.2 billion

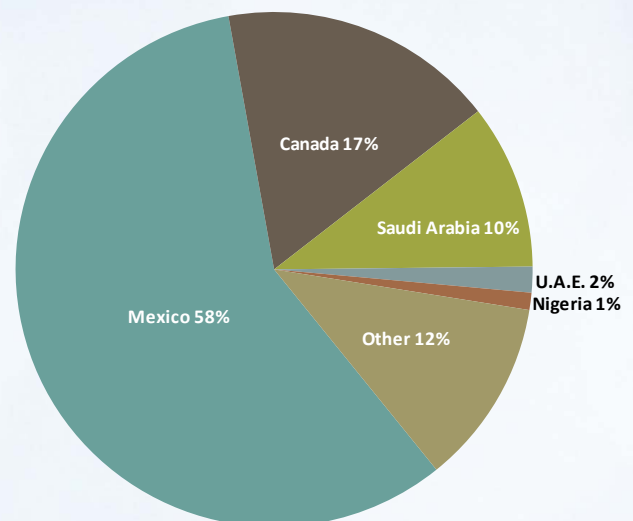
How Texas Ranks in the U.S.

All Employees	No. 8
Production Workers	No. 8
Value Added	No. 10
Value of Shipments	No. 6
Total Capital Investments	No. 10

Texas Exports

- Texas automobiles & parts exports in 2012 were valued at \$18.3 billion – up 12.7% from \$16.2 billion in 2011.
- In 2012, automobile & parts manufacturing was Texas' 5th largest export sector.

Top Export Markets



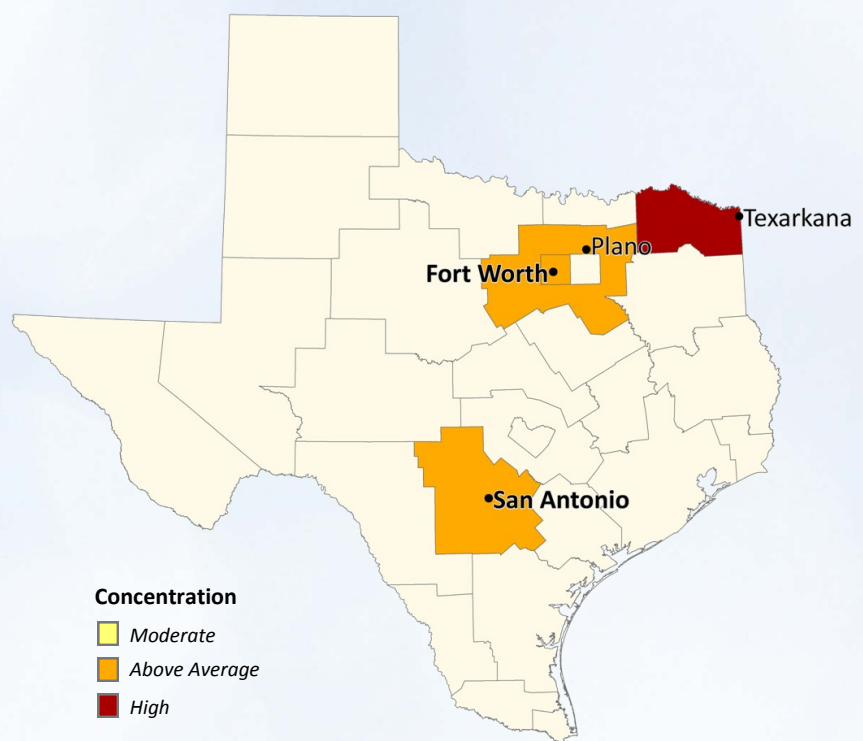
Sources: Texas Workforce Commission, U.S. Census Annual Survey of Manufactures, WISERTrade, Texas Manufacturers Register

Major Industry Employers in Texas

Company	Location(s)	Products
Toyota Motor Corporation	San Antonio	Pickup truck assembly
General Motors Company	Arlington	Pickup truck & SUV assembly
Peterbilt Motors Co.	Denton	Heavy-duty trucks
Continental Automotive Systems	Seguin	Sensors & controllers
Lear Corp.	Arlington	Automotive seating & interior trim

Regional Concentrations

The map at right identifies the state's Workforce Development regions with above-average specializations in automotive manufacturing. The highlighted regions are not the only areas in Texas where workers in this sector can be found, but rather represent areas with the greatest concentrations relative to the size of the local labor force. This industry is primarily concentrated in San Antonio and North Texas.



Recent Industry Trends

- Texas motor vehicle and parts employment increased by 1.8% between Q4 2011 and Q4 2012.
- In 2012, General Motors announced a \$200 million stamping facility will be added to its Arlington, Texas assembly plant, adding 180 jobs. This expansion was preceded by a 2011 decision to invest \$331 million for retooling and body shop expansion in Arlington, creating 110 jobs.
- In 2012, Germany-based Continental Automotive Systems announced plans to invest \$113 million to expand its Seguin, Texas powertrain controller plant, adding 300 new jobs to the area economy.