



OESA

Automotive Supplier Barometer

August 2006

OESA

1301 W. Long Lake Road, Suite 225

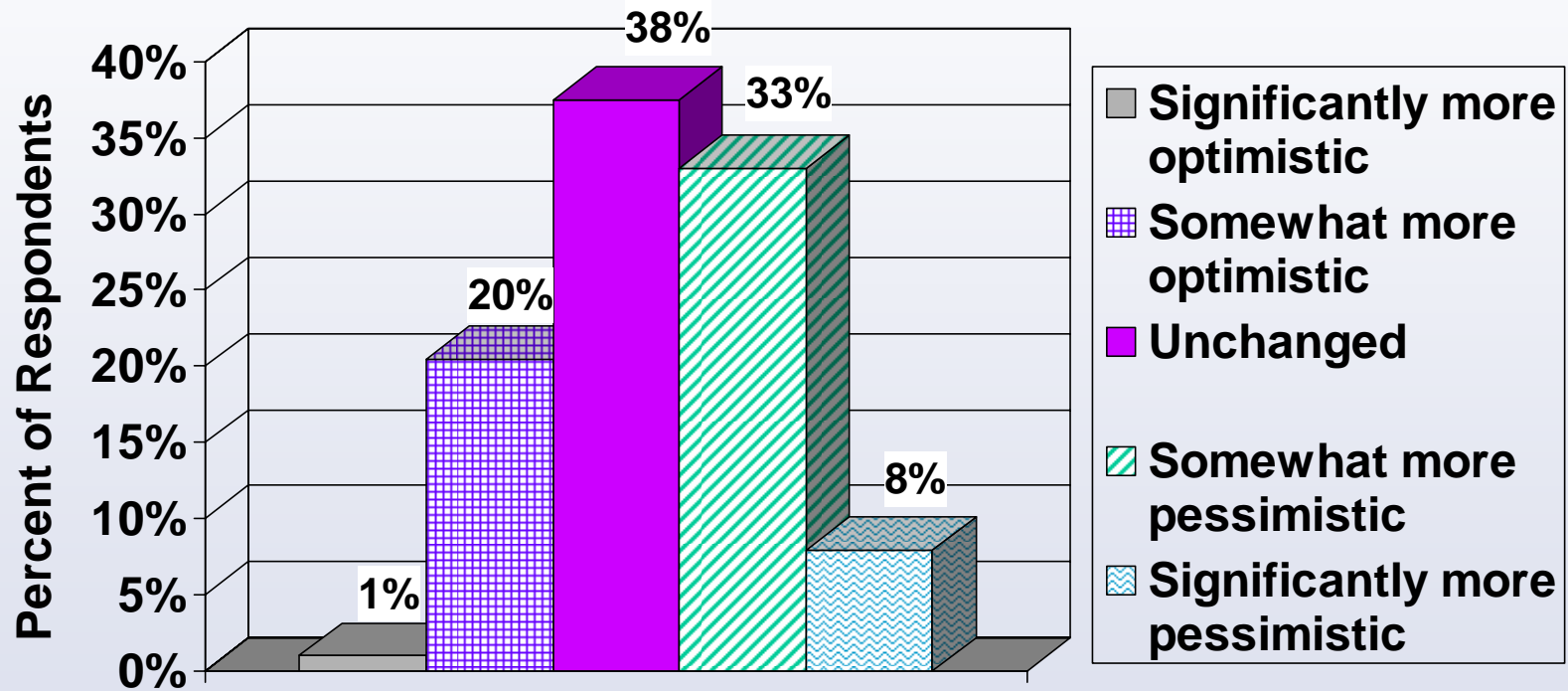
Troy, MI 48098

248-952-6401

www.oesa.org



Question 1: Describe the general twelve month outlook for your business. Over the past month, has your opinion become:



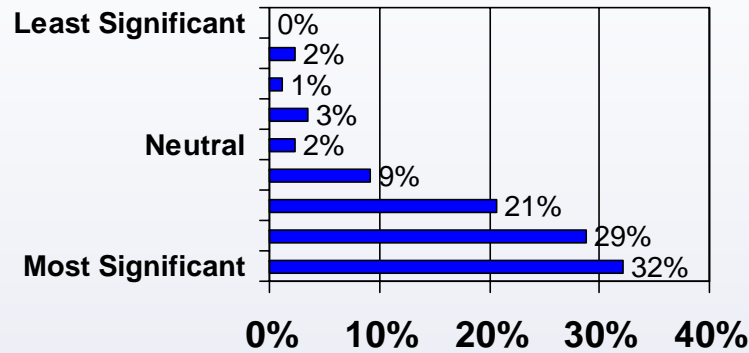
Responses = 88

Source: OESA Supplier Barometer August 2006

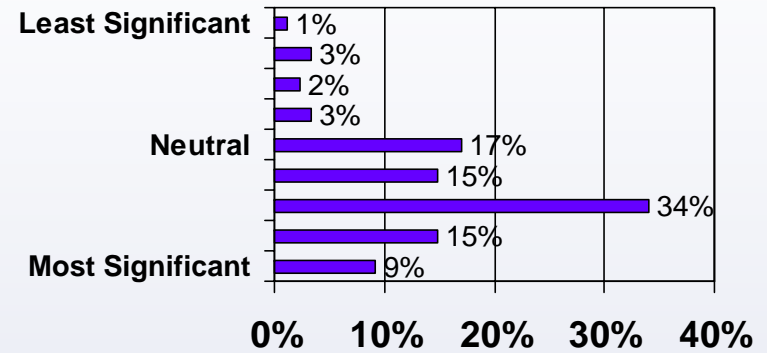


Question 2: Rate your assessment of the underlying uncertainty each of these variables presents to your company in achieving its current business plan.

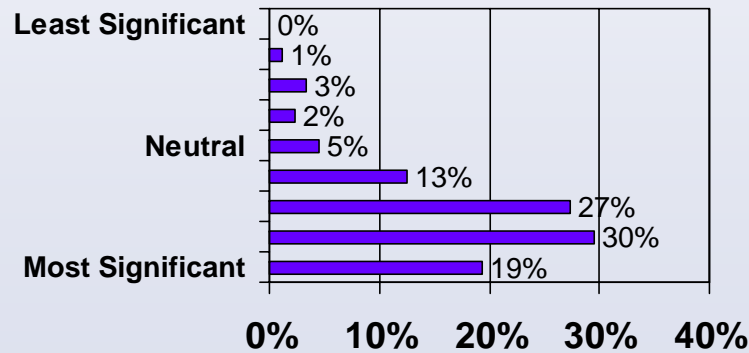
NA Production Schedules



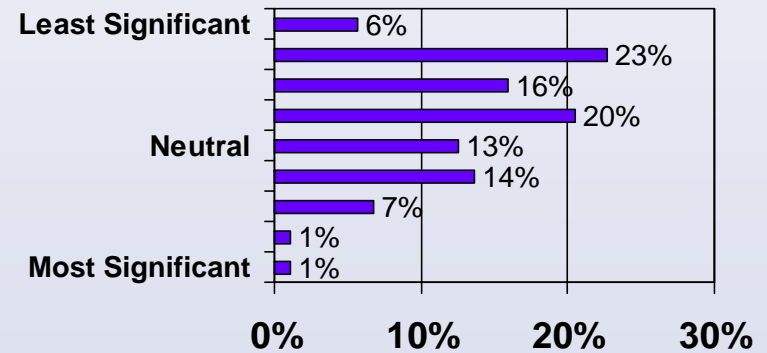
Energy Markets



Material Markets



Labor Markets



Responses = 88

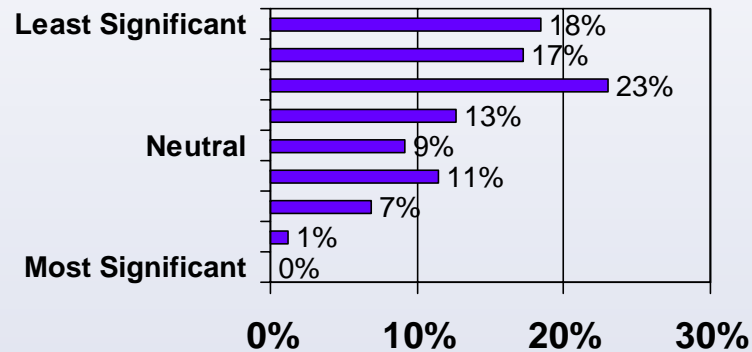
Horizontal axis shows percent of respondents

Source: OESA Automotive Supplier Barometer August 2006

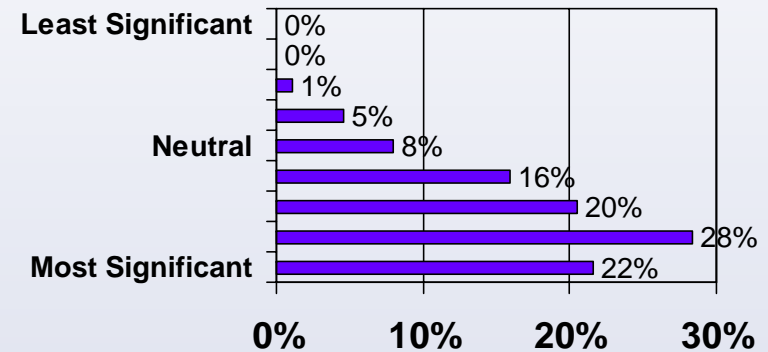


Question 2 (cont.): Rate your assessment of the underlying uncertainty each of these variables presents to your company in achieving its current business plan.

Capital Markets



Customer Pricing



Responses = 88

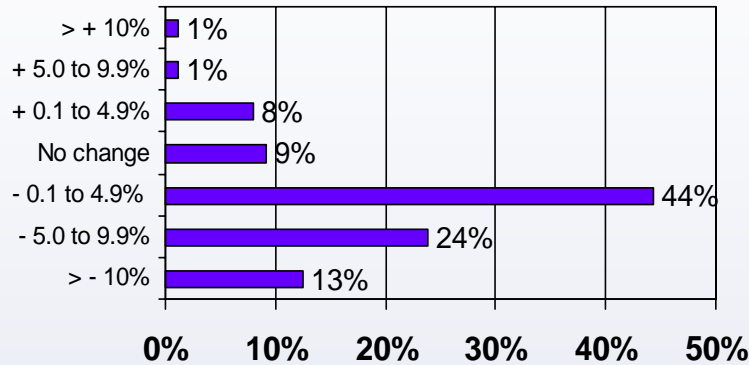
Horizontal axis shows percent of respondents

Source: OESA Automotive Supplier Barometer August 2006

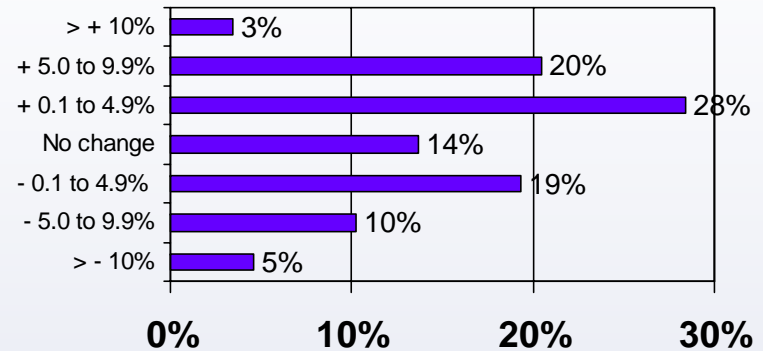


Question 3: Rate the change in these variables that you expect over the next 12 months versus the prior 12 months.

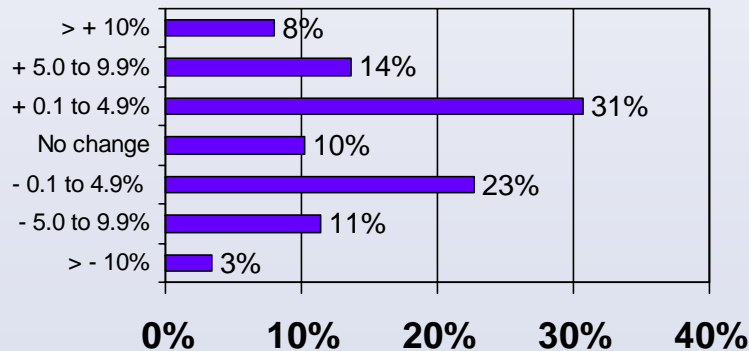
NA Production Schedules



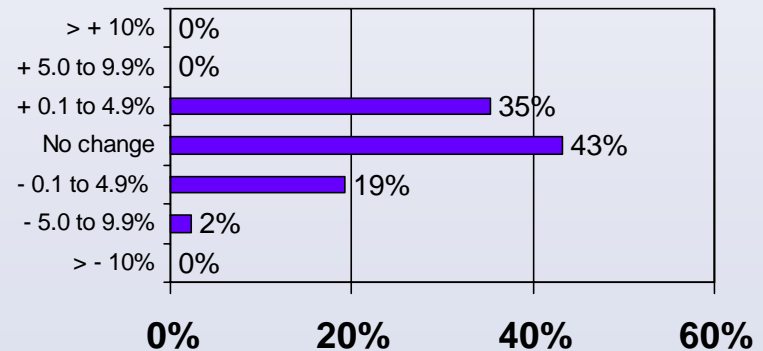
Energy Markets



Material Markets



Labor Markets



Responses = 88

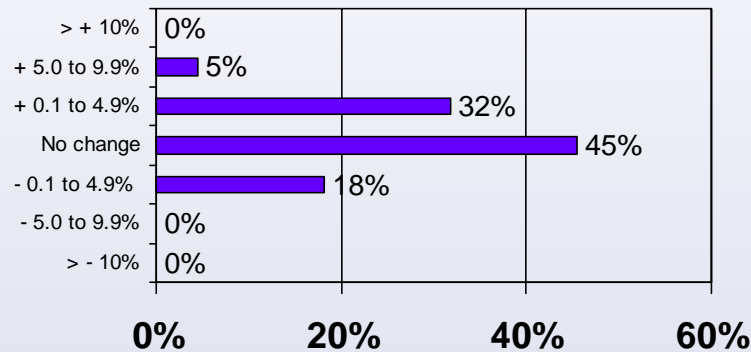
Horizontal axis shows percent of respondents

Source: OESA Automotive Supplier Barometer August 2006

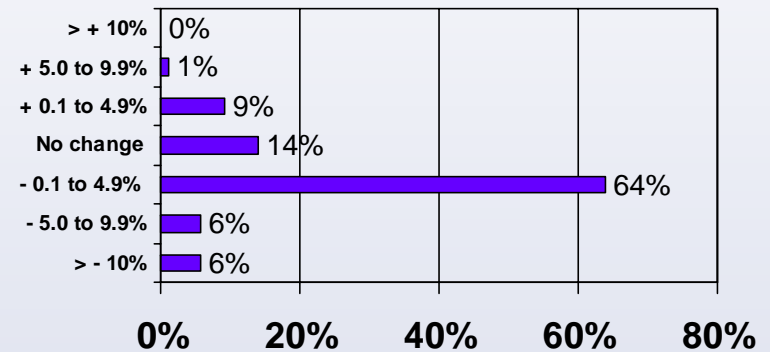


Question 3 (cont.): Rate the change in these variables that you expect over the next 12 months versus the prior 12 months.

Capital Markets



Customer Pricing



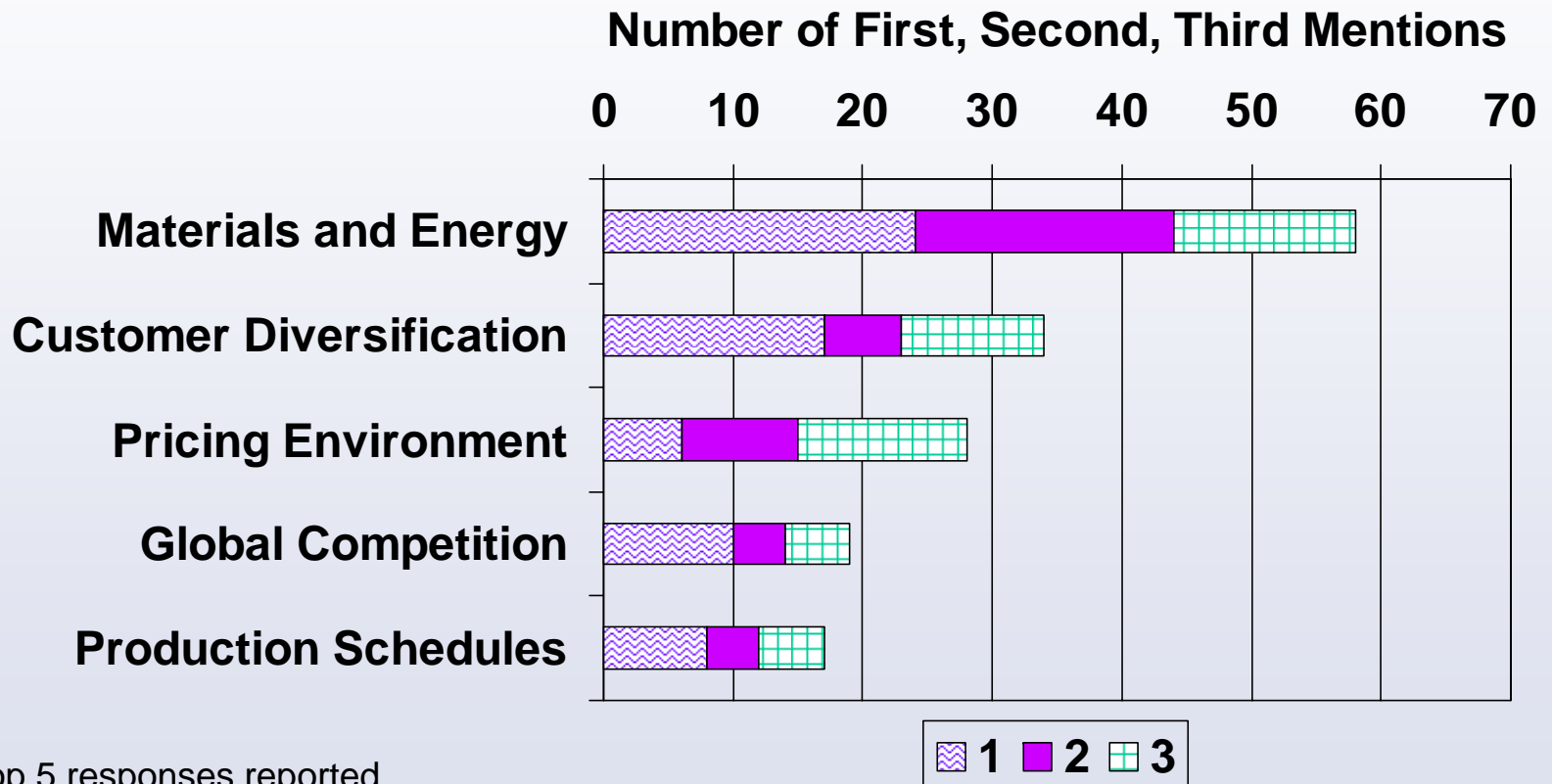
Responses = 88

Horizontal axis shows percent of respondents

Source: OESA Automotive Supplier Barometer August 2006



Question 4: Identify the top 3 strategic concerns facing your company.



Top 5 responses reported

Horizontal axis shows number of respondents

Source: OESA Automotive Supplier Barometer August 2006



Question 4 (cont.): Identify the top 3 strategic concerns facing your company.

- **Interesting comments that did not make the top five concern list but should be watched (in alphabetical order):**
 - Ability to manage growth
 - Capital constraints, cash availability
 - Currency exchange risk
 - Directed sourcing by customers
 - Human resource availability
 - Inability to restructure labor rates and rules
 - Lack of R&D innovation
 - Leadership
 - Logistics, transportation costs
 - Productivity, cost reduction efforts
 - Program launch management
 - Reducing exposure to financially stressed customers and suppliers
 - Rising interest rates



Question 5: What is your forecast for 2007 U.S. light-duty vehicle sales and 2007 North American light-duty production?

- 2007 U.S. light-duty vehicle sales
 - 16.54 million units (median forecast of 35 respondents without the highest and lowest outlying forecast)
 - Eliminating the highest and lowest outlying forecast, the range equaled 17.2 million units to 15.7 million units

- 2007 N.A. light-duty vehicle production
 - 16.0 million units (median forecast of 38 respondents without the highest and lowest outlying forecast)
 - Eliminating the highest and lowest outlying forecast, the range equaled 17.2 million units to 14.2 million units

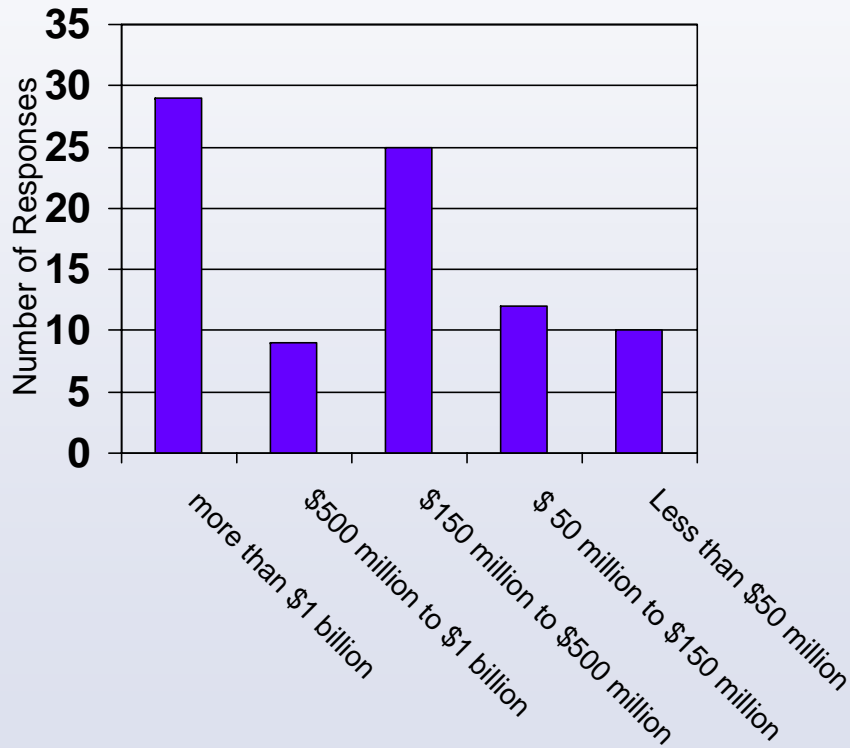
Source: OESA Automotive Supplier Barometer August 2006



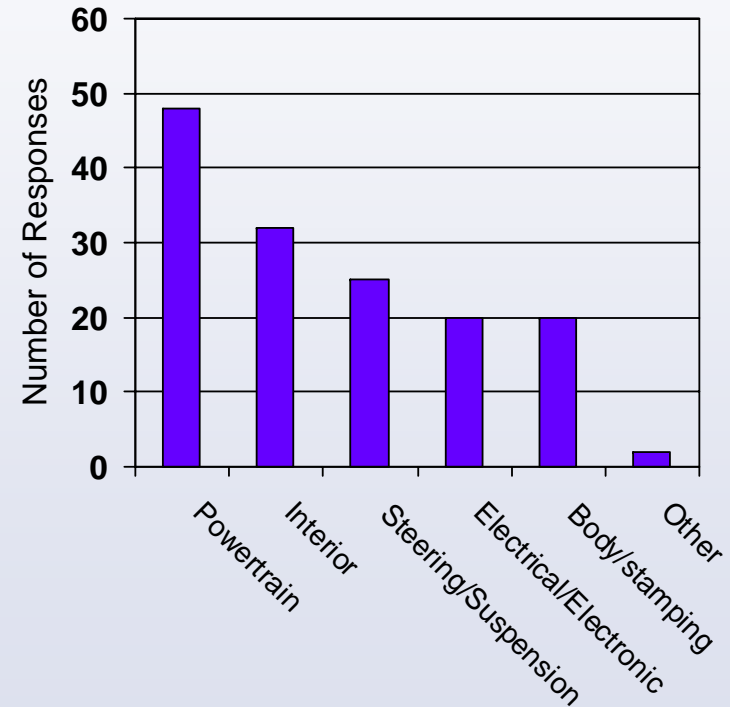
Respondent Profile

- There were 88 individual respondents from 76 companies. The OESA Automotive Supplier Barometer was conducted between August 14 – 16, 2006.

**Global Automotive Revenue
Number of Respondents**



**Automotive Systems
Number of Mentions**



Source: OESA Automotive Supplier Barometer August 2006



For comments or questions, contact:

Dave Andrea, Vice President
OESA
1301 W. Long Lake Road, Suite 225
Troy, MI 48098

248-952-6401 x 228
dandrea@oesa.org
www.oesa.org