



**LEGACY, INNOVATION, AND THE RACE AGAINST CHINA:
THE AUTOMOTIVE INDUSTRY AND THE MICHIGAN ECONOMY**





INTRODUCTION

Detroit, Michigan - by the turn of the 20th century, the city had cemented itself as the hub of automotive manufacturing and innovation, rightfully earning its title of Motor City.^[1] Proximity to natural resources and nearby manufacturing centers, such as steel from Pittsburgh, Pennsylvania, allowed business moguls like Ransom E. Olds and Henry Ford to rapidly scale up production of the internal combustion engine.^[1] Over the decades that followed, hundreds of small auto manufacturers gave way to household names – General Motors, Ford Motor Company, and Chrysler.^[2,3] And despite hardships, the automotive industry has remained one of the most revered business sectors of the entire American economy, with Michigan at its center. Over the last decade, automotive manufacturers worldwide have begun shifting gears – investing in research, development, and production of electric vehicles (EVs) and today, Michigan is home to nearly 19% of U.S. auto manufacturing, the highest in the nation.^[4] While the transition to electrified transportation started slow, over the last five years, EV adoption has been rapidly increasing. From less than 400,000 EVs on the road in 2015 to nearly 6.4 million today, EV sales now account for almost 10% of new car purchases across the country.^[5] In Michigan, this growth, coupled with \$26.2 billion in announced private investments for EV and battery manufacturing, spurring the creation of over 25,000 jobs across the state, means that Michigan has a great deal to gain from the increased production of EVs.^[6] In fact, it is projected that Michigan could see over 50,000 new jobs by 2030 as EV manufacturing continues to ramp up.^[7] However, as harmful domestic economic policies are implemented and foreign competition from auto manufacturers in China intensifies, these economic gains could be in jeopardy before they reach their full potential. **Consequently, instead of punitive tariffs, supportive state and federal policies are needed to secure the global competitiveness of the American – and Michigan – electric automotive industry.** Absent certainty and supportive policies, we are forfeiting the jobs and economic opportunity that Michigan was built on.



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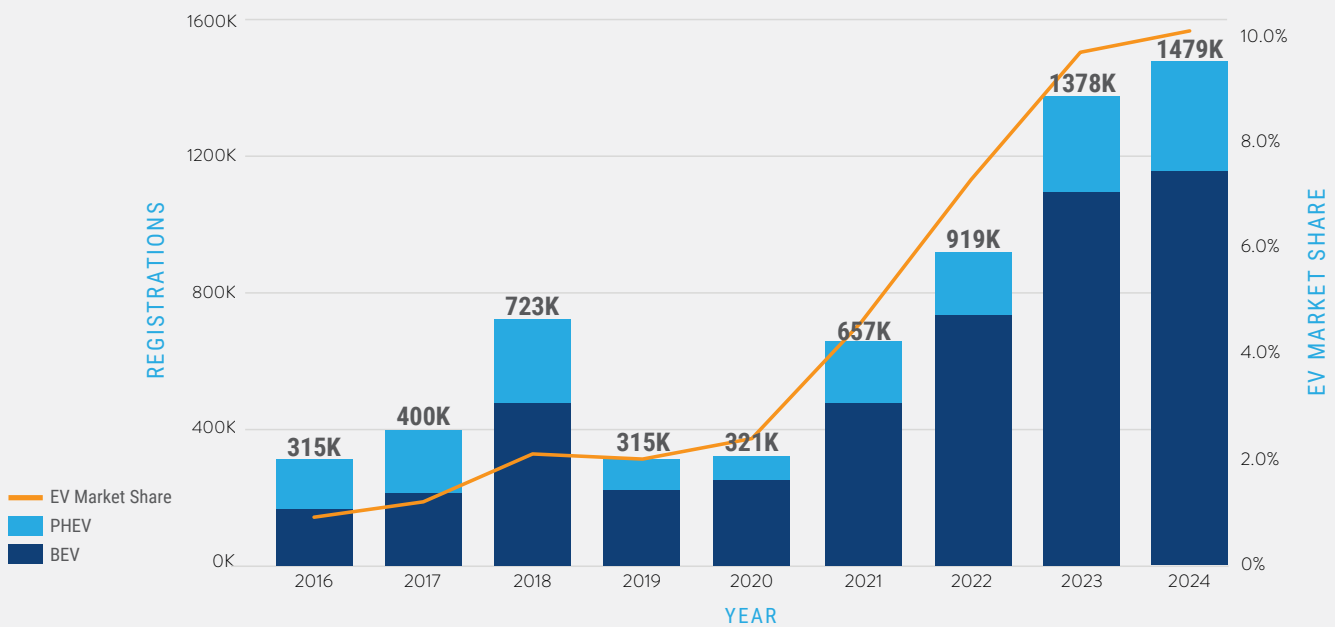
SHIFTS IN VEHICLE ADOPTION

In 2019, nearly 315,000 new light-duty EVs were sold throughout the United States (Figure 1), making up just 1.8% of total vehicle sales at the time.^[5] Since then, new light-duty EV sales have seen a 369.8% sales increase, bringing the number of total new EVs on the road to 6.4 million. Today, EV sales now account for almost 10% of market share.^[5]

Equally remarkable is the growth of the medium- and heavy-duty (MHD) market segment, which grew from about 1,400 new MHD EV purchases in 2021 to 124,000 in 2024 – an astounding 8,800% sales increase (Figure 2).^[5]

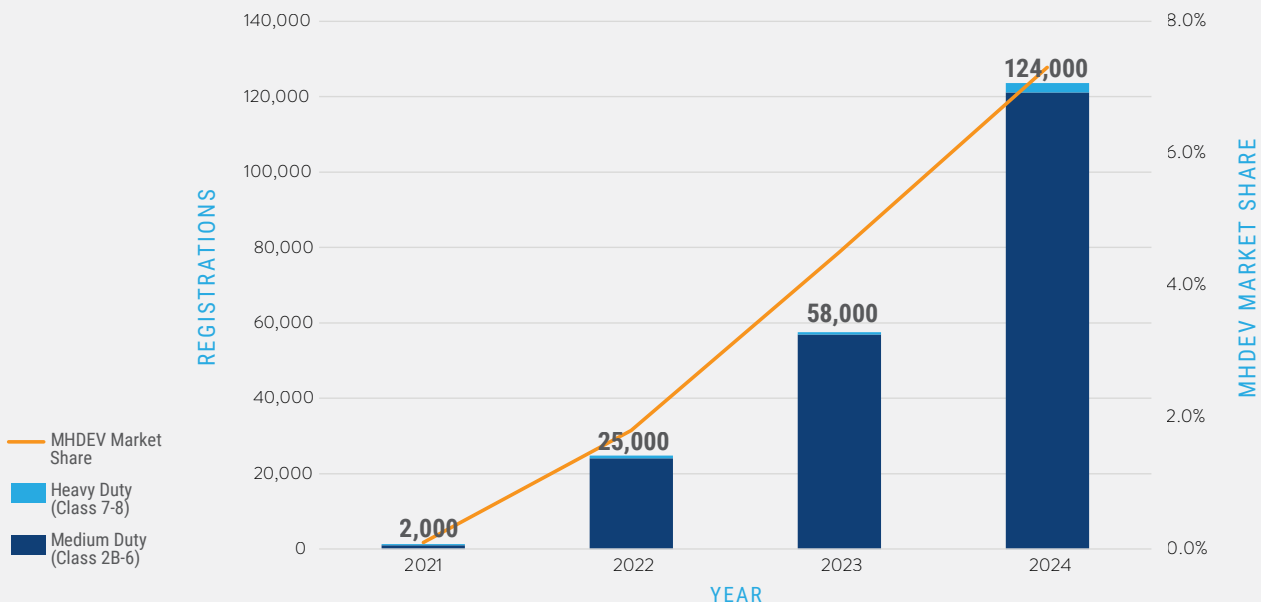
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Figure 1: Passenger EV Adoption Growth from 2016-2024



Source: Atlas Public Policy, EV Hub - EV Market Dashboard.^[5]

Figure 2: Medium- and Heavy-Duty EV Adoption Growth from 2021-2024



Source: Atlas Public Policy, EV Hub - EV Market Dashboard.^[5]

Today, the industry is seeing drivers hold onto their vehicles for a longer period of time with an estimated 38% of active U.S. vehicle registrations in the 6-14 year old cohort.^[8] Giving the aging vehicle population, a large number of drivers will be looking to trade in their older models for something new in the next decade.^[9] Under favorable market conditions, this increase in vehicle demand could result in a 3% increase in new passenger vehicle sales in 2025 alone.^[9] While gas-powered vehicles will still make up the majority of vehicle purchases for years to come, new vehicle adoption trends clearly show that the momentum of EV adoption is rapidly increasing. Accelerated by technological innovation and declining prices, 2024 projections indicated that 79% of vehicle shoppers would be considering EVs for their next vehicle purchase by 2028,^[10] translating to between 30 and 42 million EVs on U.S. roads by 2030.^[11]

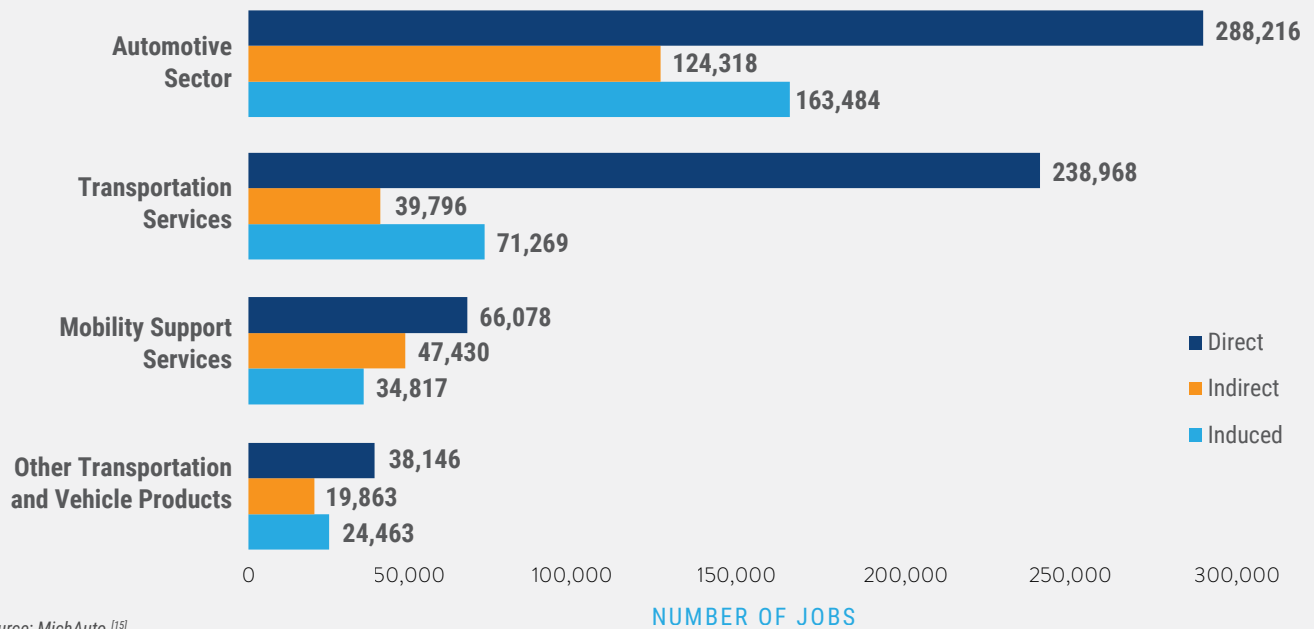
Given these forecasts, it is clear that EVs will play a critical role in the future of the transportation sector. As a leader in automotive manufacturing, Michigan's economy stands to gain a lot from rising vehicle sales in the next decade. Rash, irresponsible economic policy decisions, however, currently threaten the promise of this growth. In early April 2025, in an apparent effort to encourage increased domestic production, sweeping tariffs were announced on foreign goods, including a 25% tariff on automotive imports.^[12] Since then, the breadth and severity of these tariffs have fluctuated dramatically from day to day. The unpredictability of current economic policy decisions alone is enough to drive manufacturers to pull back on key investments, reduce their workforce, and cut research and development spending. If implemented, **analysts project that sustained tariffs could increase the price of all new vehicles by thousands of dollars, which would result in a sales decline of approximately 1.8 million units in the U.S. and Canada this year – inevitably leading to mass layoffs.**^[12] Even if American automotive manufacturers reshore more of their operations, that will take time, result in additional costs, and will not be enough to offset the lost employment resulting from rising costs and declining sales.^[12] It is clear that economic uncertainty is bad for business.

IMPACT ON THE MICHIGAN ECONOMY AND JOBS

Across the U.S., the automotive industry directly and indirectly employs 13 million workers and injects \$1.2 trillion into the U.S. economy each year.^[13] In fact, the Alliance for Automotive Innovation reports that every job in auto manufacturing sector creates 10.5 jobs across the economy.^[14] As a whole, in 2022 alone, Michigan's mobility sector, which includes the automotive industry, other transportation products and services, and mobility support services, contributed nearly \$348 billion to the Michigan economy – 27% of the state's gross economic output – and supported almost 1.2 million jobs, or 20% of Michigan's workforce (*Figure 3*).^[15] On its own, the automotive sector accounts for over half of the mobility workforce.^[15] As of 2024, 206,000 of those jobs were in auto manufacturing, making it the largest auto manufacturing workforce of any state.^[16] Automotive manufacturing, and the EV transition in particular, also leads to job creation in other related industries, including new jobs with manufacturers producing batteries and charging equipment, general contractors and electricians installing the chargers, service providers offering charger maintenance contracts, and more.^[15] Collectively, these businesses and their employees contribute over \$14 billion to municipal, state, and federal taxes.^[15]

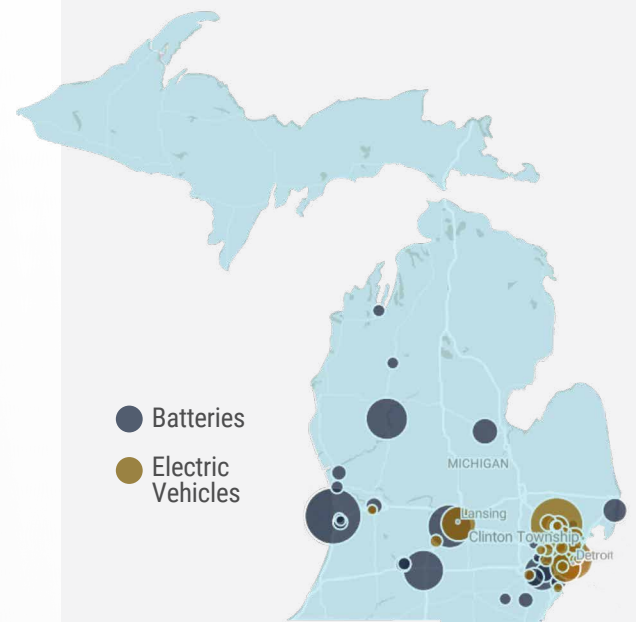
In 2022 alone, Michigan's mobility sector **contributed nearly \$348 billion to the Michigan economy – 27% of the state's gross economic output – and supported almost 1.2 million jobs, or 20% of Michigan's workforce.**

Figure 3: Employment Contribution by Mobility Industry Category (2022)



By fully embracing the transition to EVs, Michigan could see the creation of 56,000 additional automotive manufacturing jobs by 2030, according to the World Resources Institute (WRI).^[7] While an EV does have fewer parts, recent research published by experts at the University of Michigan corroborates WRI's findings, indicating that the higher complexity of EVs has actually required more people to build each vehicle, and thus a larger workforce.^[13] **Eager to engage with Michigan's esteemed manufacturing workforce, businesses across the battery and EV manufacturing sectors have been making significant investments in the Michigan economy with \$26.2 billion in planned private investments, leading to the creation of over 25,000 jobs spanning the EV supply chain across the state (Figure 4).**^[6] Of that \$26.2 billion, more than \$19.7 billion (75%) and 14,000 jobs went to Congressional districts currently represented by Republicans (Figure 5).^[6] These investments have been instrumental in enabling critical infrastructure deployment, scaling production to help bring down costs, offsetting costs associated with opening new facilities, creating new jobs, and shoring up domestic supply chains.^[17] As the home of America's leading automotive innovators, it is imperative that these job opportunities come to and stay in Michigan.

Figure 4: Distribution of Battery and EV Investment across the State of Michigan (2016-Present)

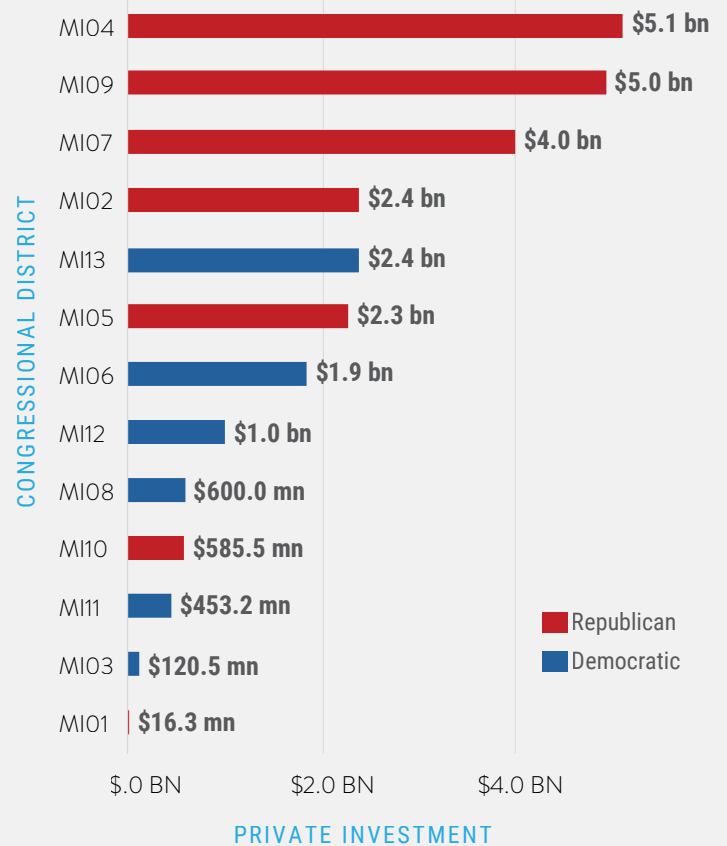


EVs also have a wider span of supply chain components. In addition to traditional auto manufacturing parts and assembly jobs, battery manufacturing and the growing charging infrastructure supply chain to support vehicle electrification is also leading to job growth across the country.^[13] Since 2019, 234 new EV battery manufacturing and recycling facility projects have been announced, generating over \$133 billion in investment and leading to the creation of over 99,000 jobs nationwide.^[6] Of those, 34 are in Michigan, amounting to over \$16 billion in new investments and nearly 15,000 jobs in battery manufacturing and recycling.^[6] Today, battery manufacturing is dominated by China, which produces 75% of the global lithium-ion battery supply, 12% of which is exported to Europe and the U.S.^[18] **As EV adoption rates continue to rise in the U.S., increased investment in domestic battery production will unlock a more vertically integrated supply chain and reduce dependence on Chinese imports.**^[18] Furthermore, the collocation of this broader EV supply chain can lead to reduced transportation costs before assembly, thereby leading to more concentrated job creation and enabling operational efficiencies.^[19]

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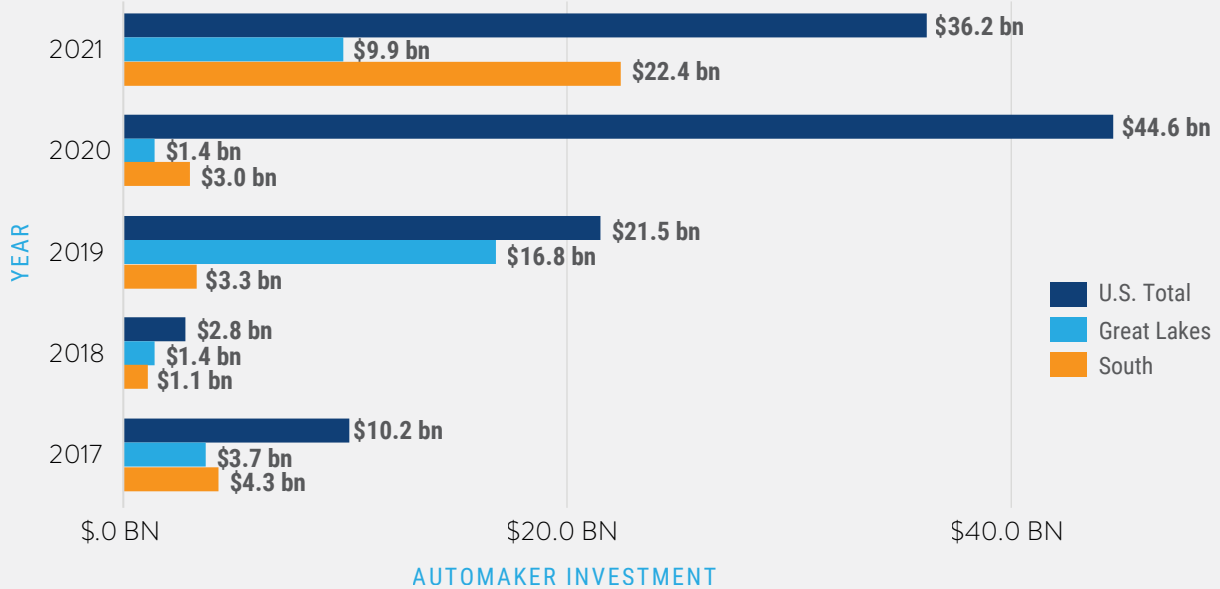
As shown, the automotive industry as a whole and its transition to manufacturing more EVs has been wildly beneficial to Michigan – more economic growth, more jobs, and more business development. The state's focus should be on fostering this development and creating a more attractive business environment for the manufacturers and innovators. This is especially true because competition for dominance in the transportation sector has been heating up not only abroad, but also domestically. Southern states, by capitalizing on lower energy and labor costs, have been laying the groundwork for an industrial migration for decades - drawing auto body manufacturing, battery manufacturing, and even battery recycling facilities.^[20] In fact, 2017 marked the first time that southern states outpaced the Midwest for automaker investments – \$45.2 to \$39.9 billion (*Figure 6*).^[21] Of that, 74% was from traditional automakers including General Motors and Ford Motor Company.^[21] Like Michigan, states including Georgia, North Carolina, and Tennessee have also garnered attention for significant auto industry investments – \$24.6 billion, \$20.6 billion, and \$15.5 billion respectively.^[6]

Figure 5: Distribution of Investments by Michigan Congressional District (2016-Present)



Note: Last accessed April 11, 2025

Source: Atlas Public Policy, Clean Economy Tracker.^[6]

Figure 6: Investments Announced by US Automakers, Great Lakes vs. the South (2017-2021)Source: CNBC ^[21]

Over the last several years, however, the transition to EVs has become highly politicized, giving rise to criticisms and distrust of the country's largest manufacturing contributor to GDP.^[22] Reckless policy decisions – such as the implementation of tariffs on essential foreign allies and threats of eliminating critical federal- and state-level tax credit and incentive programs – has the capacity to sow doubt and discourage future investments in the state.^[23] The threat and implementation of tariffs on critical U.S. allies in April 2025 is already having profound impacts on the U.S. economy. Since the 2024 election, Atlas Public Policy reported that more clean energy projects were canceled in the first quarter of 2025 than in the previous two years combined.^[23] In response to the growing unpredictability of federal economic action and concern over a subsequent economic downturn, since January 2025, businesses that had made significant EV and battery investments have announced the rescission of over \$3.6 billion in investments nationwide – over \$56 million in Michigan alone.^[6] Additionally, though not officially canceled, hundreds of millions of dollars in project investments are currently stalled.^[23]

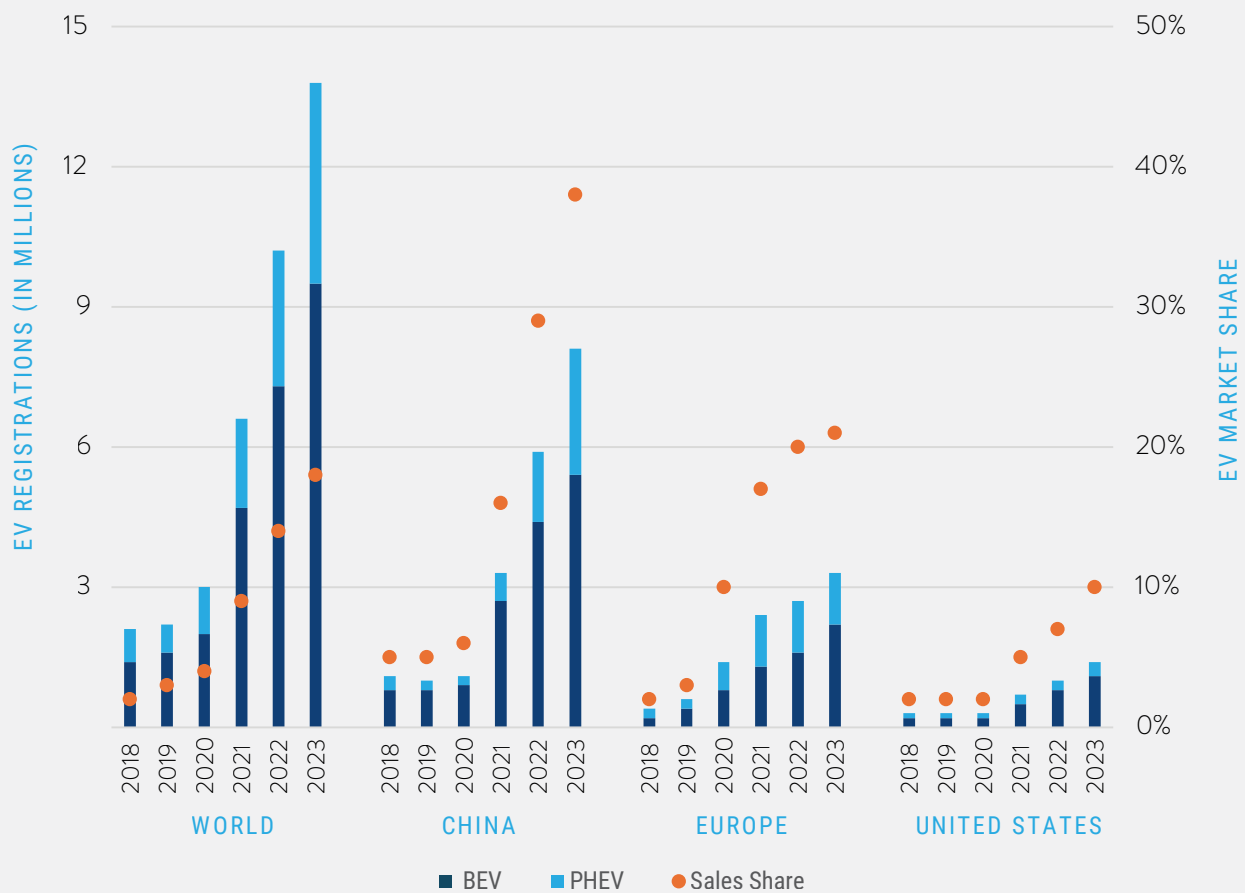
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The dramatic ripple effects of these economic policies on an industry that has been historically sensitive to economic fluctuations cannot be understated.^[24, 25] Given the reliance of Michigan's economy on the automotive industry, no state will feel the impacts of this downturn more acutely than Michigan. Up until now, by encouraging technological advancements, strengthening economic ties to key U.S. allies, and implementing measured tariff policies, Chinese automakers have largely been kept at bay from infiltrating U.S. markets. While the most recent tariffs may continue to ward off foreign competitors, the resultant rising costs and subsequent layoffs will stymie American auto innovation while the rest of the world's auto manufacturing continues to progress. **Consequently, failure to support the automakers in effectively navigating current market conditions, including the continued shift to EV manufacturing, could significantly harm the American automotive industry. Moreover, ceding EV leadership could be catastrophic to the Michigan economy and the 1.2 million Michiganders who work for and rely on the mobility sector.**^[16]

CHINA IS WINNING

For over a century, American and European automotive companies have dominated the vehicle manufacturing market. While Chinese automakers had a stronghold of their own domestic market, they could not rival the vehicle offerings from the U.S., Germany, and Japan that dominated the rest of the global market.^[26,27] To attract more consumers beyond its borders, starting in 2009, China quietly started to introduce attractive financing opportunities and funding for EV research and development, enabling Chinese manufacturers to shift production and commodity acquisition to support a nascent EV industry.^[26,27,28,29,30] That year, a mere 500 EVs were sold in China. Over the course of the next 14 years, the Chinese government supported the development of its industry with the equivalent of over \$231 billion in incentives.^[31] In the race to dominate the evolving automotive sector, China's subsidized head start has certainly paid off - the Chinese auto industry is now making high-quality vehicles and running fully under its own market power.^[32] With over 100 EV brands at various price points,^[29] nearly 6 million EVs were sold domestically in China in 2022 (*Figure 7*), and in 2023 that number increased by 35% to 8.1 million.^[29,30,34]

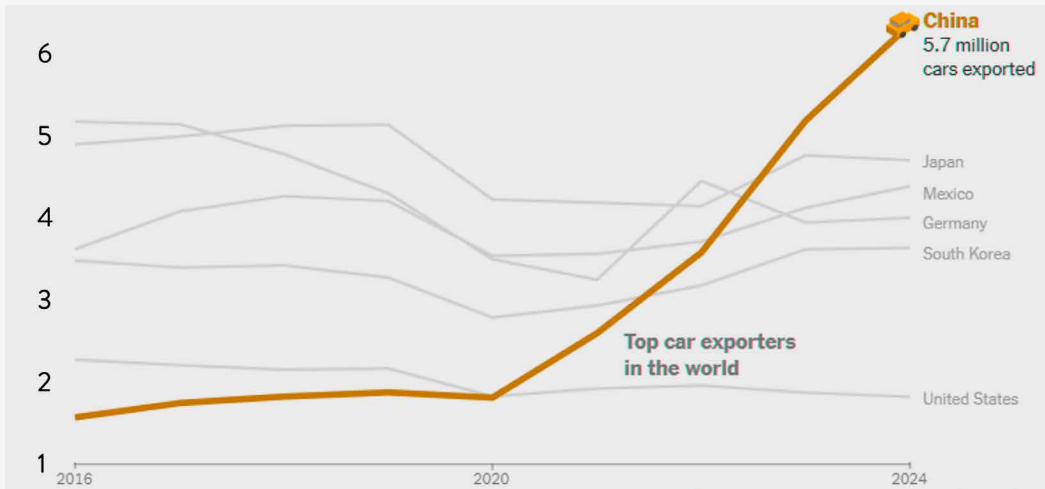
Figure 7: EV registrations and sales share in China, United States and Europe, 2018-2023



Source: International Energy Agency.^[34]

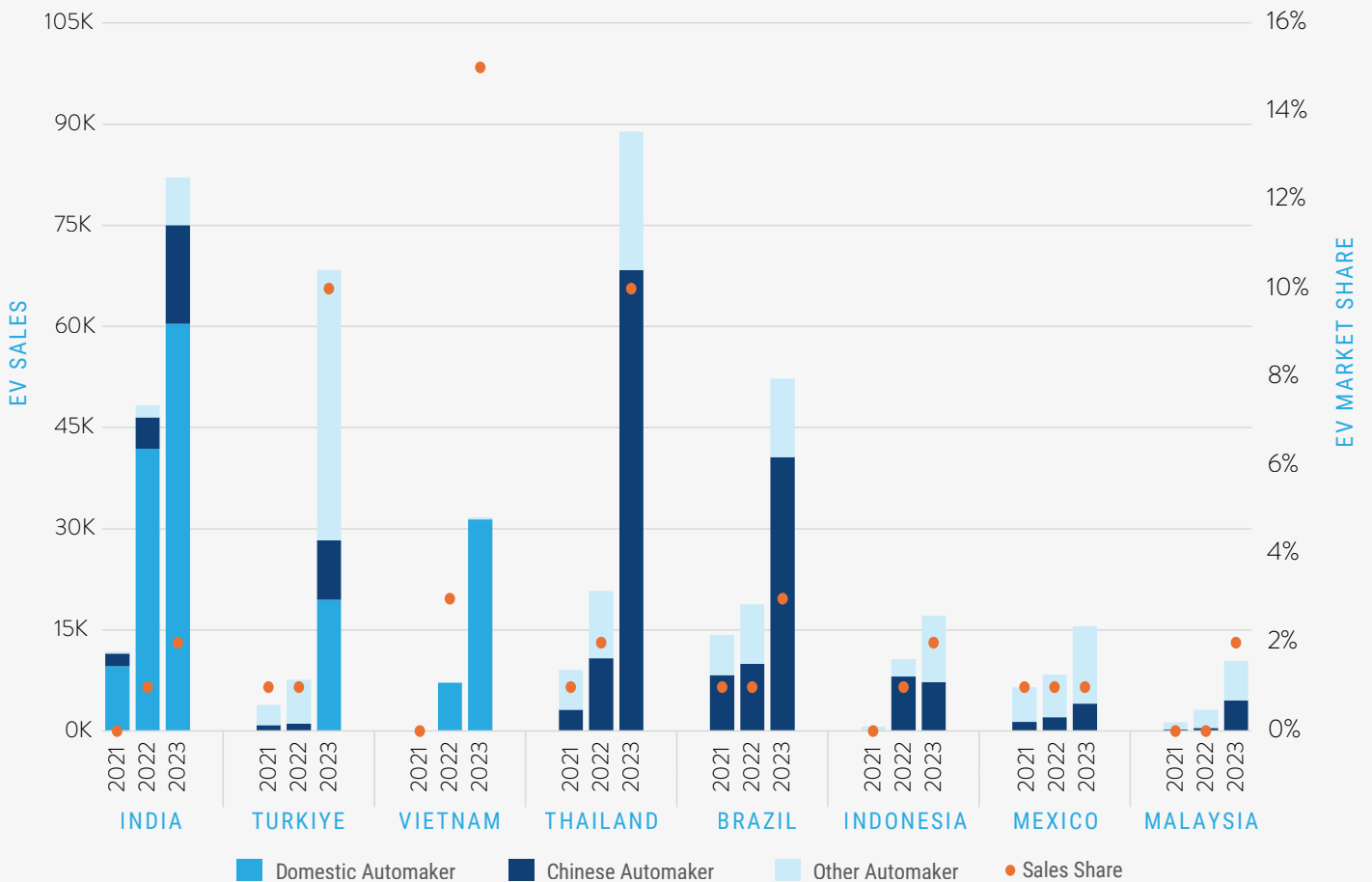
If Beijing was running this race just on its own soil, this growth would not matter to Michigan. But, in 2023, **China overcame Japan as the world's leading vehicle exporter with 5.7 million vehicles exported** (Figure 8),^[33] 25% of which were EVs.^[33, 34] Currently, 60% of the world's EVs and over 75% of the batteries that go into them are produced in China,^[27] and new markets are rapidly emerging, particularly in Europe and Southeast Asia (Figure 9).^[33, 34, 35, 36, 37]

Figure 8: Changes in automotive exports by country, 2016-2024



Source: The New York Times.^[33]

Figure 9: EV sales in emerging markets, by origin of carmaker, 2021-2023



Source: International Energy Agency.^[34]



To date, a 100% U.S. tariff on Chinese goods implemented in May 2024, which was increased to 110% in January 2025, has kept Chinese automakers entirely out of U.S. markets. Even in the European Union, which has tariffs of up to 35% on Chinese EVs, however, Chinese brands still accounted for 8% of EV sales in 2023, up from less than 1% in 2019.^[27, 36] To get around the European tariffs, Chinese automakers BYD and CATL, as well as battery manufacturer, Eve Energy, have all announced plans to build new factories and start production in Hungary, which serves as a convenient distribution hub to Europe and Asia.^[36] Aided by lower production costs and Europeans' higher willingness to pay compared to domestic Chinese consumers, as well as new partnerships that will allow for domestic production, European tariffs have made little difference in preventing infiltration of Chinese automakers into the European market.^[33, 36, 37] Moreover, European brands, recognizing China's manufacturing, are also starting to partner and invest with Chinese automakers and manufacturing hubs – for example, Volkswagen and Stellantis invested \$2.7 billion and \$1.6 billion in Chinese brands XPeng and Leap respectively in 2024.^[27]

CONCLUSION

For now, Chinese automotive manufacturing is inhibited by tariffs and uncertain trade relations, which are hampering Chinese automakers from barreling into the U.S. market. As if it was not hard enough for our American auto leaders to take on this rising behemoth though, they now face adverse forces from within their own borders. Imprudent and inconsistent economic policy decisions aimed at traditional trading partners could deal just as lethal a blow to the future of the American auto industry. Rising costs will reduce the purchasing power of Americans to invest in new vehicles, lead to mass layoffs and impede innovation, which will leave American vehicle manufacturers further behind in a race that China is already dominating. The State of Michigan, with its legacy entwined with the rich history of automotive manufacturing, plays a critical role in preventing that from happening. **By implementing rational federal and state policy that enables and encourages continued private investment in the mobility sector and by embracing the transition to EVs, Michigan could create 56,000 additional automotive manufacturing jobs, as well as jobs across the industry's critical supply chain, securing its role as the automotive leader in the U.S. and throughout the world.**^[7]

But there is even more to lose. Unsupportive federal and state policy actions could upend all of this progress, spelling disaster for an industry on which the modern foundations of this country have been built. For the sake of our national and state economy, we must stand firm behind the American auto industry. Failure to do so would be **un-American**.

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