



Inside the U.S. Auto Market in 2025

Data note: The data for this article is derived from the US Census trade statistics. US Census trade statistics analyze imports and exports across all modes of transportation. That value is calculated in FOB USD. Automobiles in this article are categorized under HS 8703 (motor cars and other motor vehicles design for the transport of people), 8704 (motor vehicles for the transport of goods, i.e. commercial trucks, pickups and vans used for cargo), and 8702 (motor vehicles for the transport of ten or more people).

深度解構 2025 年美國汽車市場

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Imports and exports in 2025 have become just as important as sales figures in understanding the direction of the U.S. automotive market. **Over the first three quarters of 2025, the United States imported nearly USD 170 billion worth of automobiles from its foreign trade partners, while exporting approximately USD 55 billion, highlighting the scale and imbalance of vehicle trade flows shaping the industry.** U.S. statistical trade data illustrates how deeply integrated global supply chains continue to underpin the American auto market, even as manufacturers expand domestic production and policymakers emphasize reshoring. **Passenger vehicle imports remain a critical source of supply for U.S. consumers, while exports of U.S. built trucks and SUVs reinforce the country's role as a key production hub for larger vehicles.** Leading automakers including General Motors, Ford, Toyota, Hyundai-Kia, and Stellantis are competing not only on demand, but on how effectively they manage imports, exports, and North American production capacity.

Table 1. U.S. Total Imports of Automobiles by Value (Q1-Q3, 2025)

HS Code	2025 - Q1		2025 - Q2		2025 - Q3	
	FOB Value (USD)	%	FOB Value (USD)	%	FOB Value (USD)	%
8703	51,829,058,976	82.27	44,351,166,429	80.14	41,222,185,713	80.40
8704	10,746,049,817	17.06	10,618,046,433	19.19	9,647,515,403	18.82
8702	427,981,611	0.68	378,348,388	0.69	403,934,021	0.79
Total	63,003,090,404	100	55,347,561,250	100	51,273,635,137	100

Table 2. U.S. Total Exports of Automobiles by Value (Q1-Q3, 2025)

Country of Destination	2025 - Q1		2025 - Q2		2025 - Q3	
	FOB Value (USD)	%	FOB Value (USD)	%	FOB Value (USD)	%
Canada	8,635,150,663	44.89	5,211,551,309	30.05	6,343,969,121	34.31
Germany	1,575,824,186	8.20	1,928,825,394	11.12	2,348,336,100	12.70
Mexico	1,211,658,223	6.30	1,335,746,876	7.71	1,559,638,220	8.44
U.A.E.	978,970,149	5.09	870,013,632	5.02	899,475,454	4.87
S. Korea	420,204,345	2.19	468,817,625	2.71	672,313,319	3.64
Saudi Arabia	412,241,530	2.15	549,425,786	3.17	528,211,091	2.86
Belgium	348,456,517	1.82	391,090,655	2.26	508,724,174	2.76
Australia	675,982,396	3.52	662,576,685	3.82	482,097,681	2.61
Georgia	411,230,854	2.14	378,523,615	2.19	397,318,579	2.15
UK	248,924,155	1.30	236,827,986	1.37	297,784,965	1.62
Total	19,238,411,613	100	17,346,404,953	100	18,491,104,143	100

Understanding the U.S. Auto Market Through Trade Flows

Trade flows continued to play a defining role in the U.S. automotive market in 2025. Passenger vehicle imports, classified primarily under HS 8703, accounted for more than 80% of inbound motor vehicle trade (**Table 1**), showcasing the U.S. market's sustained reliance on foreign made cars and cross-border production networks, particularly within North America and Asia. One notable exception occurred in April 2025, when newly implemented tariffs began to influence trade patterns and Japan's share of passenger vehicle imports rose to nearly 27%, while Mexico's share fell to 19%.

(Fig. 1) Mexico largely maintained its position as the United States' primary automotive trade partner through the first three quarters of 2025, accounting for approximately 19% to 28% of total passenger vehicle imports. S. Korea followed with a share ranging between 13% and 20% over the same period.

Fig. 1. Origins of U.S. Auto Imports in Q1-Q3, 2025

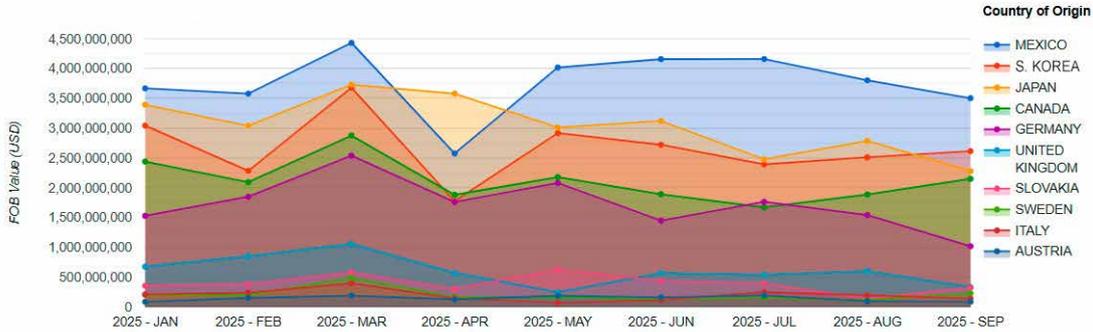
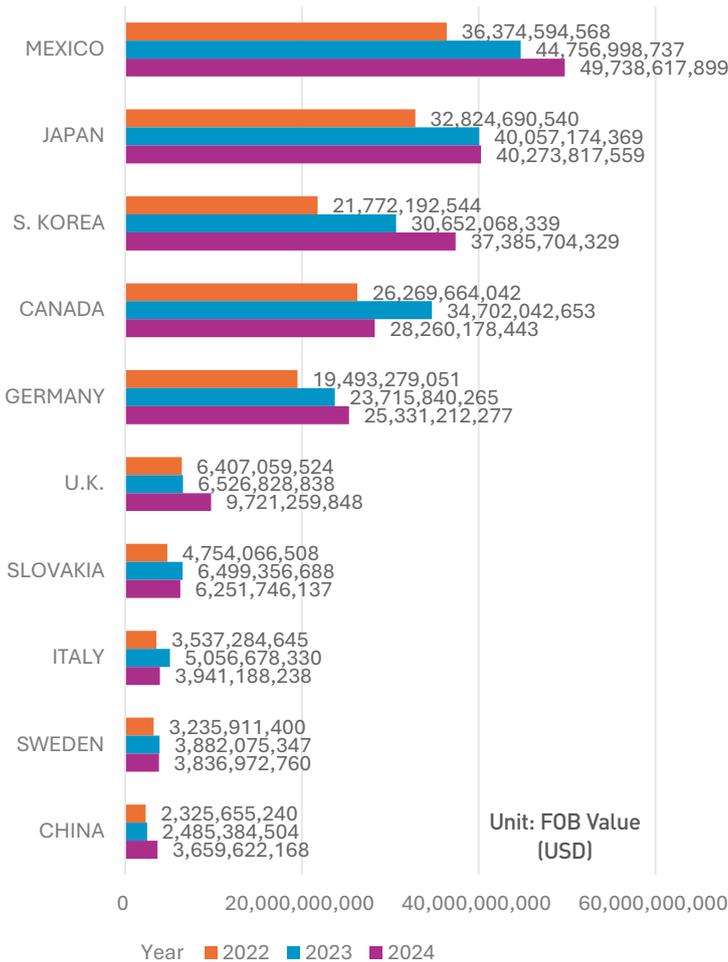


Fig. 2. Origins of U.S. Auto Imports in 2022-2024



Import volumes also reflected significant month-to-month volatility during the first half of 2025. March saw higher-than-average import activity, followed by a sharp contraction in April, when total import values declined from approximately USD 20.5 million to USD 13.2 million. Subsequent months continued to trend below first-quarter levels, suggesting a period of adjustment following policy changes and shifting sourcing strategies. From a geographic perspective, the majority of imported passenger vehicles were destined for Michigan and California, which together accounted for roughly 35% of total monthly imports, reflecting their central roles in automotive distribution, manufacturing, and consumer demand.

A similar pattern emerged in the trade of trucks and pickups classified under HS 8704, where imports were overwhelmingly concentrated among North American partners. Mexico and Canada together accounted for over 90% of total U.S. imports in this category, while countries such as the United Kingdom and Japan each represented roughly 1%. Over the past several years, imports of trucks and pickups steadily increased, rising from approximately USD 35 billion in 2022 to USD 47.5 billion in 2024, representing growth of nearly 35%. This trend reflects persistent U.S. demand for light trucks and pickups, as well as the deeply integrated nature of North American production networks supporting these vehicle segments.

Motor vehicles designed for the transport of 10 or more passengers, classified under HS 8702, represent a more specialized import segment. U.S. sourcing in this category is concentrated primarily among Canada, Turkey, and North Macedonia. Canada's role reflects its long-standing integration with U.S. transit and commercial vehicle



manufacturing, supplying a steady volume of buses built to U.S. specifications. At the same time, Turkey and North Macedonia function as important global export hubs for buses and coaches, supporting niche demand and specialized configurations. In Turkey, manufacturers such as TEMSA, Otokar, and Mercedes-Benz Türk dominate exports to the U.S., while Canadian suppliers including New Flyer, Motor Coach Industries, and Prevost remain key providers for U.S. transit agencies and fleet operators.

In export terms, the United States ships significantly fewer vehicles abroad than it imports, reflecting a trade profile driven more by production specialization than by overall market volume. U.S. auto exports are concentrated in larger frame vehicles and full-size pickup trucks, particularly those produced by manufacturers such as Ford, General Motors, and Stellantis, where domestic manufacturing remains globally competitive. In addition, a smaller but high-value share of exports consists of luxury sedans, premium SUVs, and performance vehicles produced in U.S. facilities serving global markets. **Canada remains the dominant destination for U.S. vehicle exports**, accounting for approximately 45% of export value in Q1 2025, 30% in Q2, and 34% in Q3, underscoring the depth of North American automotive integration. (Table 2) A significant portion of these exports originate in South Carolina, where manufacturers such as BMW, Volvo Cars, and Mercedes-Benz Vans operate major production facilities that supply both the U.S. market and international buyers.

Vehicles imported from Mexico, Canada, Japan, and South Korea support price-sensitive and fuel-efficient segments of the market, while U.S. based production is increasingly aligned with full-size pickups, larger SUVs, and premium models that are also well positioned for export.

This reliance on imports helps explain why U.S. vehicle sales have remained relatively resilient in 2025, even as domestic production remained concentrated in higher-margin segments. For leading automakers, including GM, Ford, Toyota, and Kia, competitiveness in the U.S. market depends on balancing domestic manufacturing with strategic imports, an approach that highlights how deeply trade flows are embedded in the structure of the U.S. automotive industry.

The U.S. automotive market in 2025 is best understood through the intersection of production, sales, and trade. Import and export data reveal structural realities that sales figures alone cannot capture, while automaker performance reflects how effectively manufacturers navigate these dynamics. As leading OEMs continue to refine their production footprints and sourcing strategies, trade flows will remain a critical indicator of competitiveness in the U.S. auto market. □



Production & Sales Performance in the U.S. Auto Market

Despite continued investment in domestic manufacturing, vehicle imports remained essential to meeting U.S. market demand in 2025. **Imported vehicles, particularly passenger cars and compact SUVs, accounted for a substantial share of vehicles sold in the United States, filling segments that domestic production alone did not fully serve.** While General Motors and Ford continued to dominate U.S. production with trucks and SUVs, much of the volume in passenger vehicles was supported by foreign-built models from manufacturers such as Toyota and Kia, whose global production networks supplied the U.S. market efficiently at scale. These import flows reflect long-established sourcing strategies rather than short-term market dislocation.



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