

Four More Years: What Shawn Fain's Reelection Means for Automakers, Parts Suppliers and Other UAW Targets

October 2026

Executive Summary

United Auto Workers (UAW) President Shawn Fain claimed reelection to a second four-year term on Oct. 9, 2026, leading in every region with about 68 percent of the vote in preliminary tallies. His United UAW slate now controls the International Executive Board. Turnout was low, at about 10 percent of active members and retirees, and Fain remains under monitor scrutiny and a reported federal grand jury investigation. Nevertheless, Fain's decisive win shows that the UAW remains committed to Fain's militant approach to contract negotiations and organizing drives. What that means for the UAW's efforts over the next two years remains to be seen based on other headwinds.

Key Takeaways for Automotive OEMs

- Expect a confrontational 2028 Detroit 3 round of contract negotiations, with strike preparations already underway ahead of the contracts' April 2028 expirations.
- Expect the union to try to expand on its 2023 wage gains by making new demands relating to traditional pensions, retiree health care, job stability and protections against automation and AI.
- Non-union OEMs remain primary organizing targets. The Volkswagen first contract will be used as a showcase of the UAW's strength.
- Economic issues, including the effect of tariffs on automakers and suppliers, may temper any significant outcomes not only in the Detroit 3 negotiations but also in the UAW's organizing efforts.

Key Takeaways for Parts Suppliers

- Suppliers face double exposure: their own bargaining and organizing pressure, plus disruption from any Detroit 3 strike.
- The UAW uses bottleneck leverage at high-profit vehicle lines to win supplier wage gains, with national leadership directly involved.
- Non-union supplier plants should conduct vulnerability audits now and map their single-source and just-in-time exposure.

The Election Results

Margin of Victory: Fain won more than two-thirds of the vote. His nearest competitor, UAW Vice President Rich Boyer, who heads the union's Stellantis department, received roughly 13–14 percent of the vote. This is in stark contrast to Fain's first election victory, in which he narrowly defeated incumbent Ray Curry in a runoff. Fain has now secured reelection outright and is the first directly elected UAW president to win reelection.

Slate Sweep: Region 4 Director Brandon Campbell, Fain's slate-mate, will replace incumbent Margaret Mock as secretary-treasurer. Slate candidates also won the three vice president races. In total, Fain's campaign slate will control 13 of the 14 seats on the union's executive board.

Term: Winners serve from their swearing-in through the swearing-in after the union's 2030 election. This means Fain's leadership will continue through the 2028 Detroit 3 negotiations.

Fain's Statement: Following the election Fain stated, "The membership has spoken. UAW members are united and want us to keep fighting and building on what we've done." He then reaffirmed his combative approach stating, "We're fired up for negotiations at places like John Deere, Volvo and General Dynamics Land Systems in 2027, leading up to the Big Three contracts expiring on May Day 2028."

At his swearing-in ceremony, Fain focused primarily on three issues:

- **AI and Technological Challenges:** "We're going through one of the most profound technological revolutions in our lifetimes with artificial intelligence, the threat of humanoid robotics and mass automation. It's a profound threat and a challenge to our way of life—we are in a fight for humanity."
- **Extreme Economic Disparity:** "Welcome back, the year is 2026. Income inequality is at its highest level in U.S. history. 12 billionaires own as much wealth as the bottom half of society. ...That is criminal. It's a crisis. And that's corporate greed out of control."
- **Long-Term Growth & The Immediate Fight:** "We are in a generation-defining moment. The work they did back then set the table for their kids, their grandkids and their great-grandkids. And what we do from this point forward is going to set the table for future generations."

Low Voter Turnout

Turnout was low and similar to 2022: a little over 10 percent of the union's roughly 400,000 active members and 600,000 retirees returned mail ballots. Some observers expected Fain's strongest support to come from higher-education and legal-aid locals on the coasts, but turnout there fell by more than half. For example, at University of California Local 4811, only about 2,500 of 60,000 members voted, although 75 percent of the voters backed Fain. As in 2022, members in large manufacturing locals were the keys to Fain's victory.

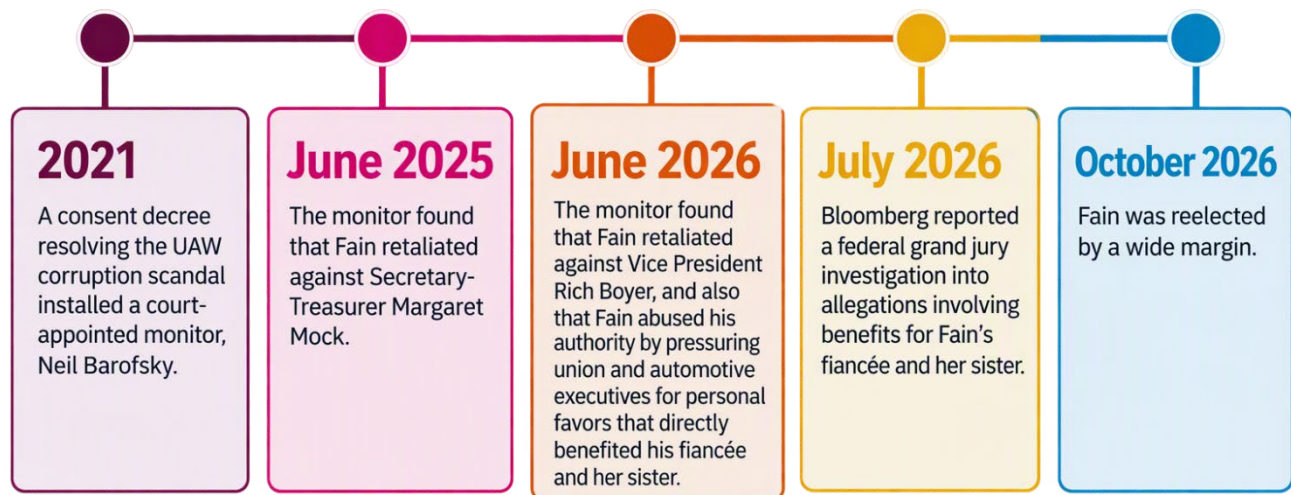
What Turnout Means for Employers

- The mandate is decisive among voters but thin as a share of membership, so UAW leadership will want to energize the rank and file well ahead of the 2028 Detroit 3 negotiations.
- Expect early, high-visibility mobilization such as practice pickets, strike-readiness campaigns and member surveys to build engagement before the 2028 negotiations.

- Low engagement at academic and non-manufacturing locals suggests the union's organizing gains outside the auto industry may be less cohesive than they appear. Employers in those sectors should not assume uniform member commitment. Further, the UAW and other unions in the academic sector have apparently tamped down their organizing efforts as there are concerns that the current National Labor Relations Board majority could overturn a 2016 case on the ability of student workers to unionize.
- Critics will cite the low turnout to undermine the legitimacy of the leadership. However, the slate's sweep of the executive board is likely to quash some of the infighting that had been occurring at the UAW's highest levels.

The Monitor and Federal Investigations

Timeline



Current Status: No criminal charges have been filed, and Fain denies the allegations. The monitorship is scheduled to end in early 2027 but can be extended under the consent decree. It is unclear whether the election results will cause the monitor to seek an extension since Fain is less likely to face dissent at the executive level. Under the consent decree, if Fain is indicted, he would be temporarily removed from office pending an investigation by the monitor, who could then pursue disciplinary action if the charges are substantiated. That said, Fain's replacement would still be selected by the executive board, which is now populated almost entirely with his allies.

Bargaining and Organizing Implications

- Leadership is stable and aligned for now, but a criminal charge or an extended monitorship could disrupt the UAW before 2028. Build these scenarios into bargaining plans and potential messaging for an organizing campaign.
- A leader under scrutiny has strong incentives to adopt a more aggressive public posture, so do not expect rhetoric or demands to soften.
- Leadership is likely to view organizing additional manufacturing sites as a top priority since it will allow them to loudly drum up additional public support and shore up their constituents. Expect them to use

the Detroit 3 bargaining sessions as an organizing tool. Employers should take proactive actions now instead of waiting for those negotiations in 2028.

What the Reelection Means for the Detroit 3

Confrontation and Strike Risk: Fain's victory ensures leadership continuity and cements a confrontational bargaining posture. He has already urged members to prepare for a potential strike when the current agreements expire on April 30, 2028.

Aggressive Economic Demands: The 2023 contracts delivered wage increases above 25 percent, restored cost-of-living adjustments and increased retirement contributions. Fain has signaled that 2028 will target more: restoring traditional pensions for workers hired after 2007, securing post-retirement health care and installing protections against automation and AI-driven job loss. Members interviewed during Fain's election campaign cited pensions, retiree health care, automation and job security as key issues. However, other promises from 2023 were not fulfilled, such as the agreement by Stellantis to reopen the Belvidere, Illinois plant, which closed in February 2023 and led to nearly 1,400 layoffs. The agreed-upon reopening has been delayed from 2027 to 2028.

Margin Pressure: The Detroit 3 enter this cycle facing softer demand, shifting EV investment and high costs in large part due to tariffs. Automakers should expect a union unwilling to concede on labor costs without significant friction.

Canadian Detroit 3 Negotiations: A preview of things to come? The 2026 pattern agreement reached by Unifor and Ford¹ is weaker than the front-loaded wage gains of 2023. Ultimately, job security and plant investment, not headline wage gains, drove the settlement.

Canada shows that a downturn can moderate outcomes, but it should not be read as a sign the UAW will settle cheaply since there are several key differences between U.S. and Canadian operations, including:

- **Different Leverage:** Canadian plants faced tariff-driven idling and existential investment questions. Although U.S. plants similarly face softer EV demand, tariff uncertainty, and margin pressures, they are also the beneficiaries of tariff-driven reshoring.
- **Different Leadership Incentives:** Unifor bargained for survival. Fain enters 2028 with a fresh mandate, a confrontational brand, and a need to deliver on the pension promise.
- **Different Strategy:** The UAW has institutionalized stand-up strikes and early mobilization. Unifor chose a quick, cooperative pattern settlement obtaining no-closure and product commitments, along with a modest 3 percent annual wage increase.
- **Practical Steps:** Begin strike contingency planning, including supply-chain mapping, inventory strategies and salaried-workforce deployment. Model pension and retiree health proposals. Prepare communications plans well before 2028.

¹ GM reached a tentative agreement on Aug. 22, 2026 that followed the Ford pattern. Stellantis talks opened Sept. 1, 2026, but have not gone well due to plant closure concerns which led to an overwhelming strike mandate vote on Oct. 17-18.

What the Reelection Means for Non-Union Automakers

Intensified Organizing: After winning an election at Volkswagen's Chattanooga, Tennessee plant in April 2024 (the first foreign-owned auto plant organized through an NLRB election), the UAW has continued to press its campaign across non-union foreign automakers. Volkswagen workers secured a first contract in February 2026, which the union will use as a showcase when organizing new plants.

Setbacks: Other high-profile attempts by the UAW to organize different auto manufacturers have fallen flat (including workers at Mercedes-Benz in Alabama largely rejecting the union at the ballot box in May 2024) as UAW leadership turned its focus to securing Fain's reelection and dealing with the federal monitor. Fain's reelection should reinvigorate the UAW's organizing efforts as many view it as a mandate to resume his aggressive southern organizing strategy.

"Raise the Standard Everywhere": Fain's strategy targets wage and benefit parity at non-union plants. Expect grassroots campaigns, public pressure and pressure on management to make defensive wage or benefit adjustments. The UAW may target smaller plants or critical suppliers to put pressure on manufacturers. Fain has pushed for aligned contract expirations and sector-wide solidarity, which keeps non-union facilities central to the union's national strategy.

Practical Steps: Conduct site vulnerability audits, train supervisors on lawful responses to union organizing and engage in crisis management training to test protocols and procedures. Review solicitation, distribution and electronic communications policies under current Board law.

What It Means for Parts Suppliers

Changed Rules of Engagement: Independent parts suppliers have historically operated with lower margins and wages than the automakers. The UAW has used bottleneck leverage, threatening production at high-profit Detroit 3 lines such as pickup trucks with national leadership directly involved in local disputes, to force significant wage increases at suppliers.

Wage Gains and New Units Since 2023: The union touted a deal with Bridgewater, a seating supplier for the Ram 1500 and Ford F-150, after a prolonged dispute. This also had organizing wins at Antolin in 2024 (approximately 400 workers), and at Webasto (approximately 475 workers) and Ground Effects (approximately 280 workers) in 2026. Contracts at American Axle, Allison Transmission and Daimler Truck have also been cited as examples of the union's aggressive bargaining model.

Exposure in 2028: Detroit 3 suppliers face double exposure: their own bargaining and organizing pressure, plus disruption from any Detroit 3 strike. Unionized suppliers whose contracts expire near April 2028 should expect the union to try to align or exploit timing.

Practical Steps: Map single-source and just-in-time exposure especially for specialized components and determine whether backup suppliers are available in case of disruptions as a strike or labor disruption at a tiny regional supplier could effectively shut down the entire automaker's production line. Review force majeure and customer-supply terms. Assess organizing vulnerability at non-union plants. Prepare bargaining strategy well before 2028.



Action Checklist for Non-Union Automotive OEMs and Parts Suppliers

- ☐ Conduct a pre-campaign vulnerability audit of each facility.
- ☐ Review policies against current NLRB law.
- ☐ Identify voter-list data sources and owners.
- ☐ Train supervisors and managers on lawful campaign conduct and communications.
- ☐ Prepare security and communications protocols for handbilling, demonstrations and social media.
- ☐ Benchmark wages and benefits against the 2023 UAW contracts, the Volkswagen first contract and the 2026 Unifor settlements.
- ☐ Assess temporary and staffing-agency workforce issues and joint-employer exposure.
- ☐ Build relationships with community, business and civic leaders.



Parts-supplier specific

- ☐ Map Detroit 3 customer exposure, single-source parts and just-in-time dependencies.
- ☐ Review force majeure, supply and pricing terms for strike scenarios.
- ☐ Align any union contract expirations with a 2028 strategy and prepare bargaining plans well before April 2028.
- ☐ Plan for the UAW's bottleneck tactics at high-profit vehicle lines.

Conclusion

Fain's reelection confirms that the UAW will continue the militant bargaining and expansive organizing that have defined his tenure. Employers should plan on the assumption that the union's posture will intensify through April 2028. Automakers, parts suppliers and non-automotive employers should use the time now to assess vulnerabilities, prepare contingency plans and ensure supervisors and communications strategies comply with current labor law.

If you have any questions about the developments covered in this article, please let us know.

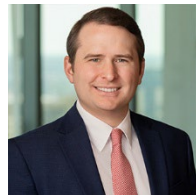


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