

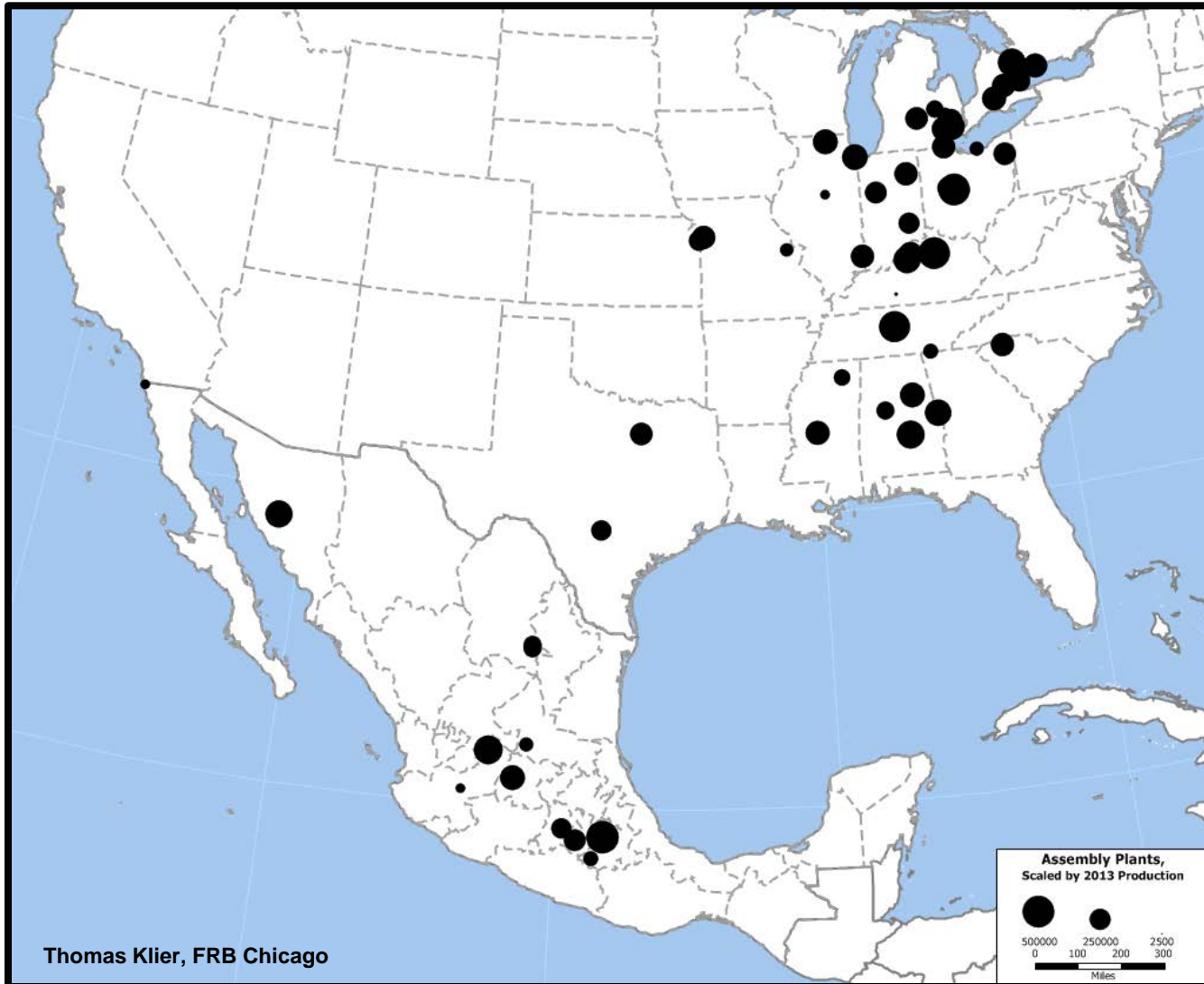
# **Automotive linkages between the U.S. and Mexico**

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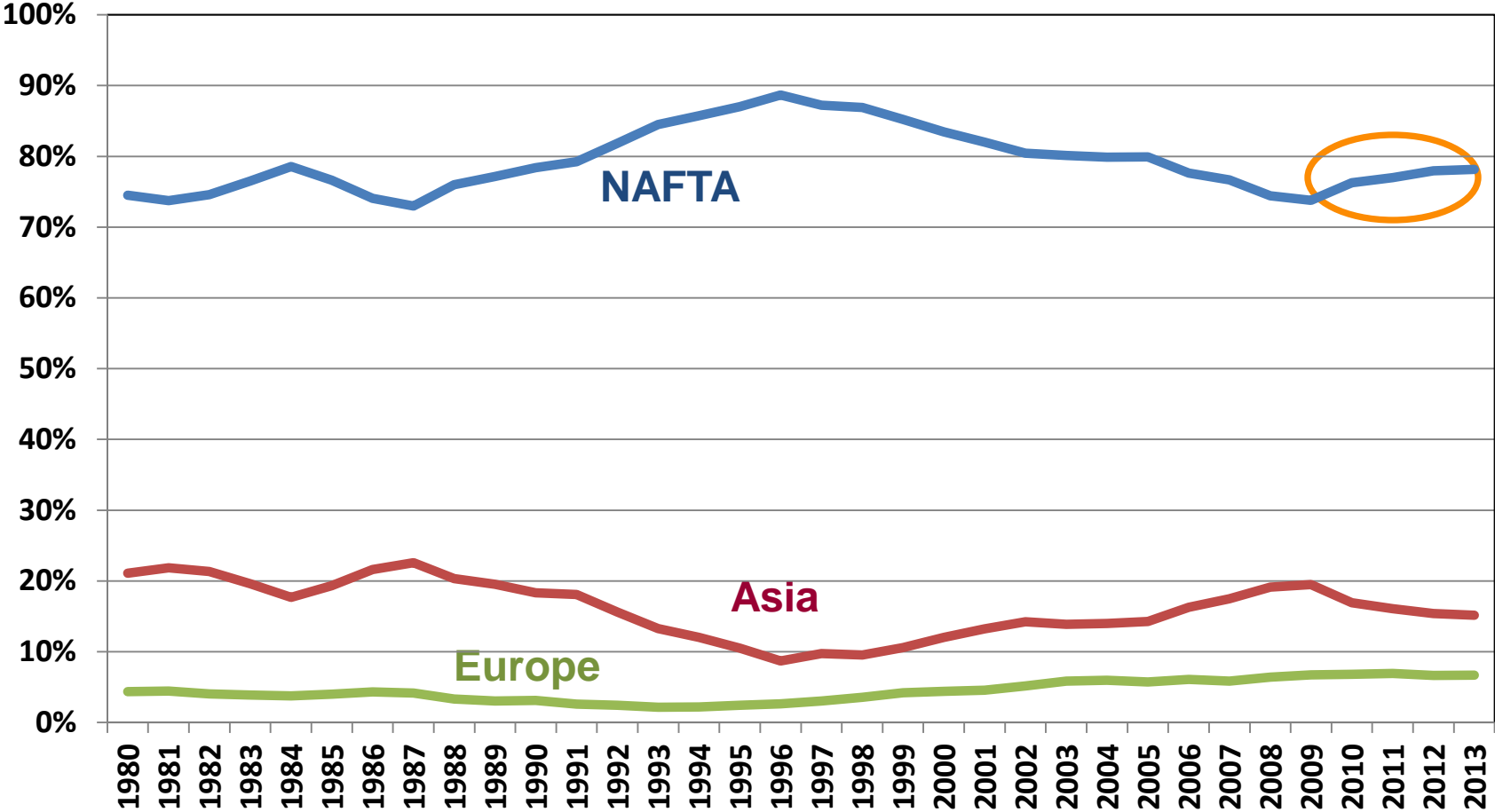
# Vehicle production in North America

2013



# Most vehicles produced where sold

## U.S. light vehicle sales by major production region



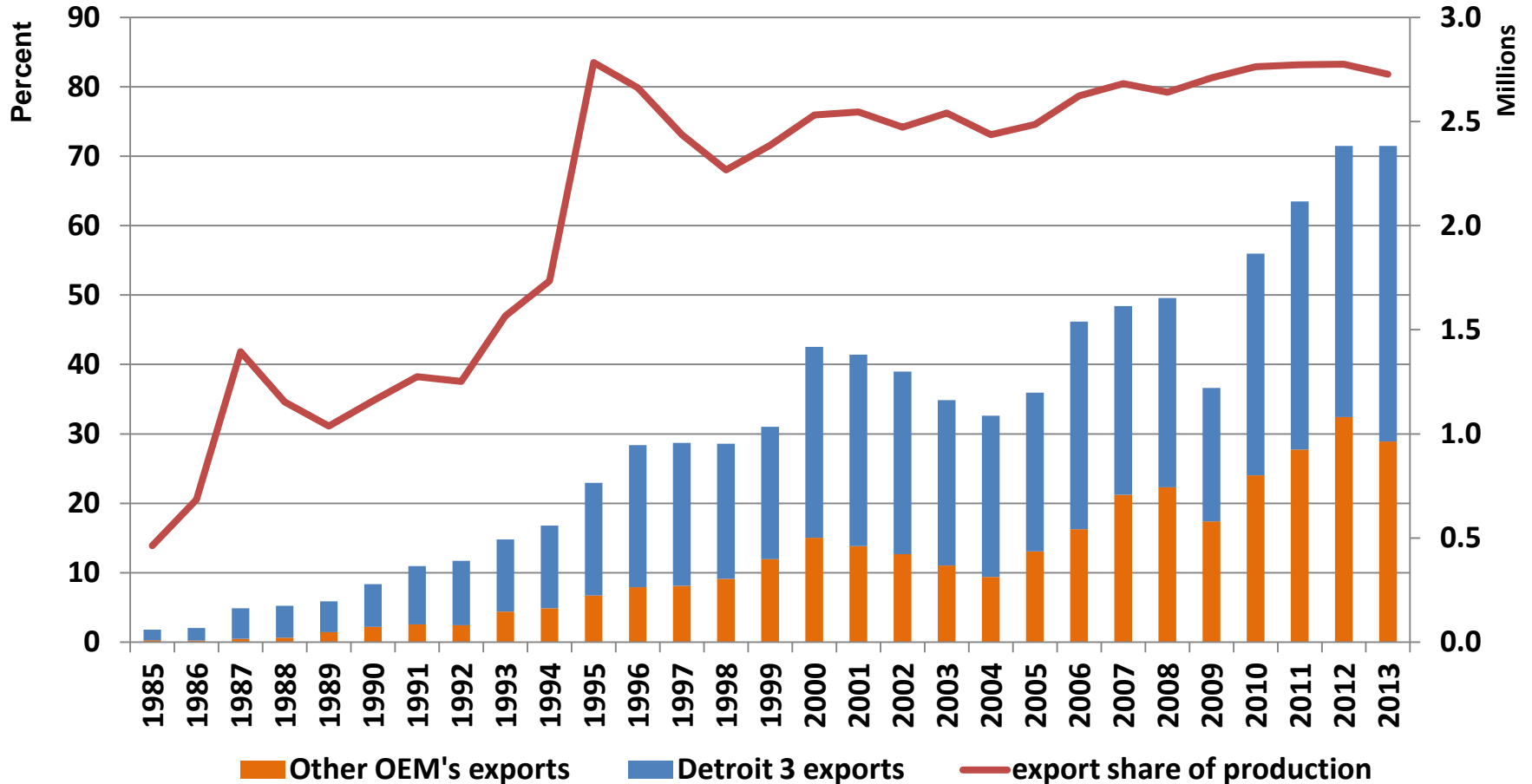
# Within N. America, gains for Mexico

## Share of light vehicle production

Country	1990	2007	2013
Canada	16	17	15
Mexico	6	13	18
U.S.	78	70	67
N. America	100	100	100

# Exports drive Mexico's growth

## Mexico's light vehicle exports



Annual exports have increased by 2.3 million units since 1985

# Those exports go north and south

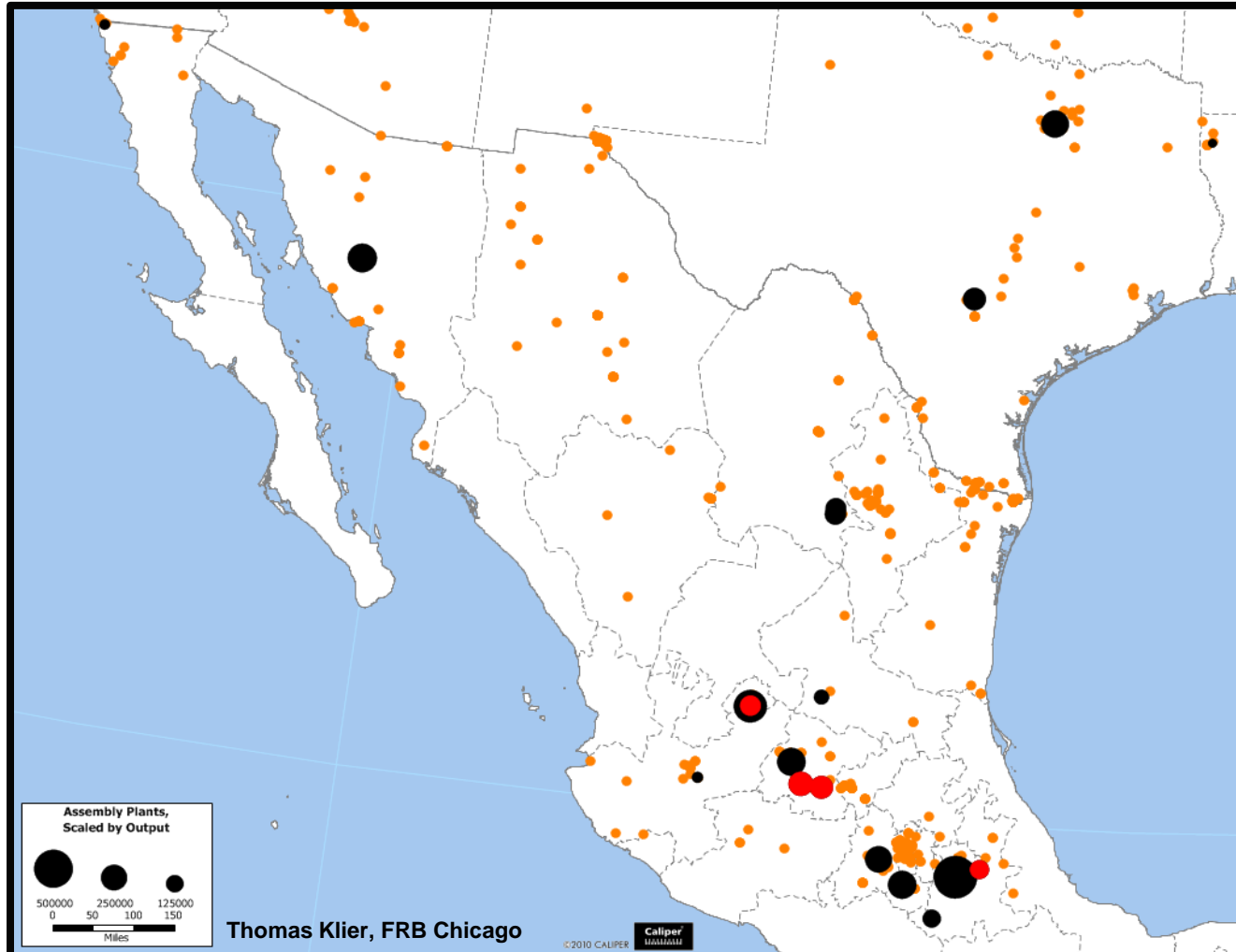
## Vehicle exports from Mexico by destination

Region	2012 export share
NAFTA	71%
Latin America	16%
Europe	9%
Africa	2%
Asia	2%

In 2013, 82% (2.38 million units) of Mexico's LV production was exported.

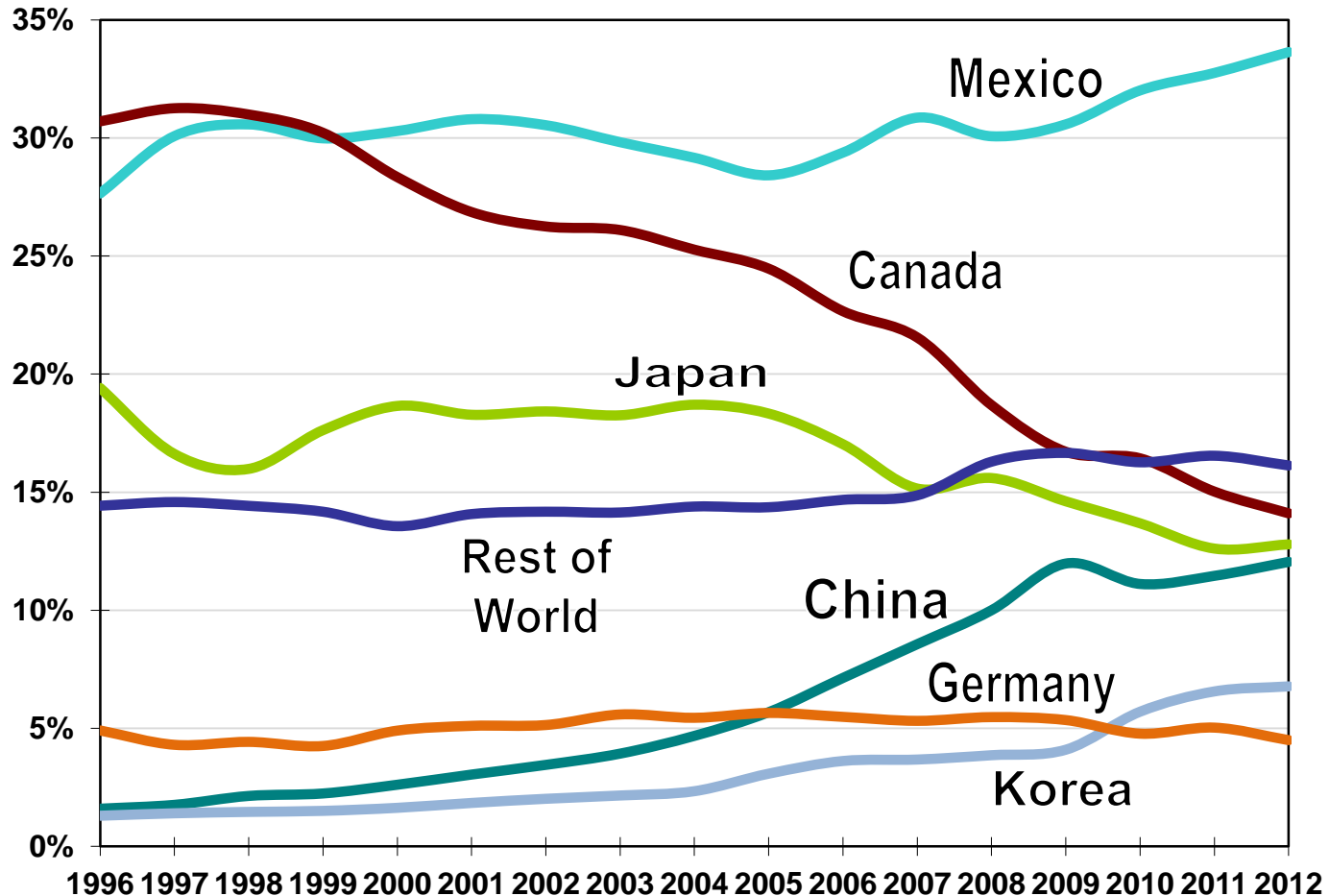
# Mexico's auto footprint is growing

Four new light vehicle assembly plants (in red), all by overseas producers



# U.S. parts imports: Mexico extends lead

U.S. motor vehicle parts imports (%)

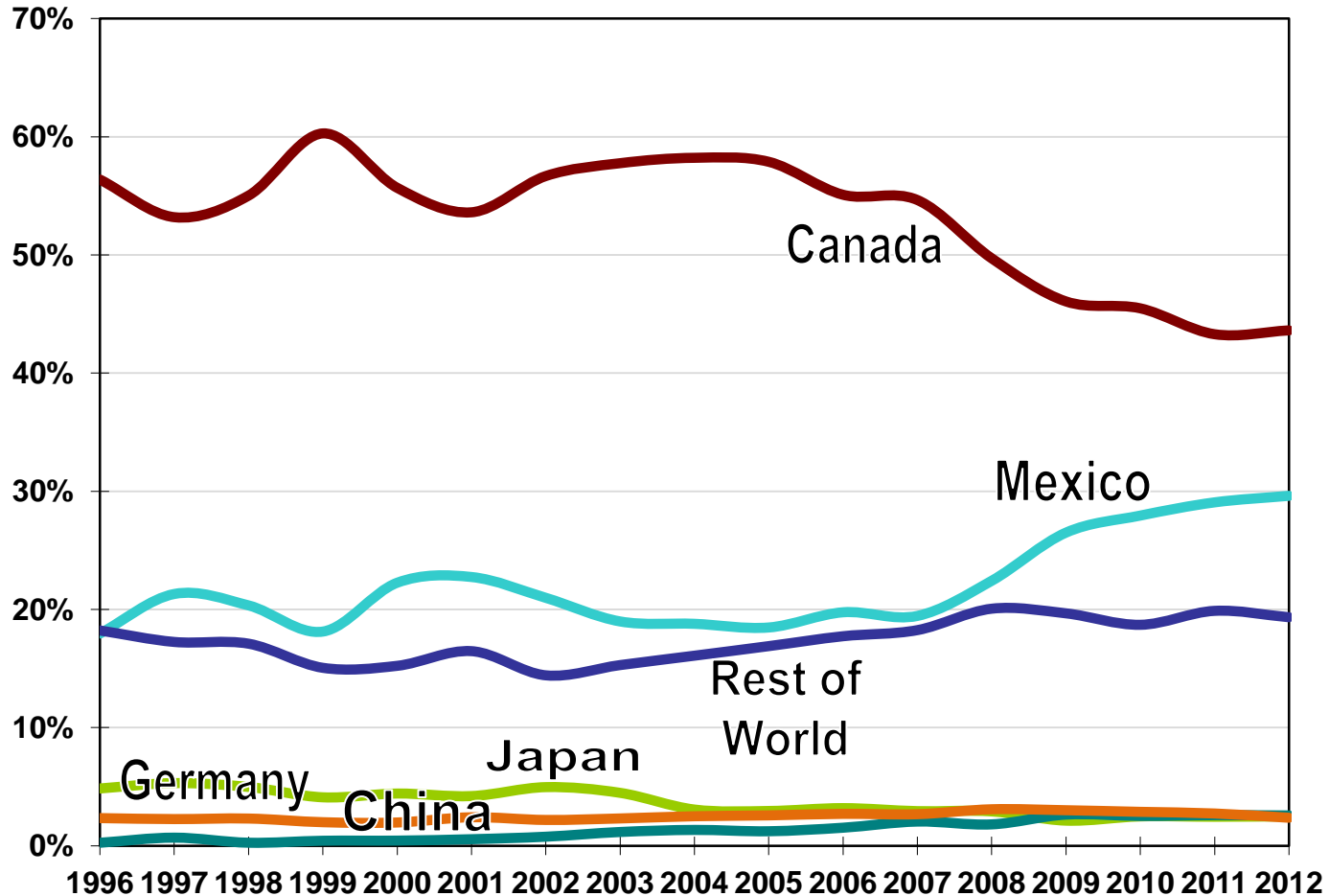


Source: ITC dataweb



# U.S. parts exports: up to Mexico

U.S. motor vehicle parts exports (%)



Source: ITC dataweb

# Summary

- **North America remains a viable location of light vehicle production.**
- **Within North America, Mexico has been gaining vehicle production share. Currently, re-shoring from Asia to North America leads to Mexico, especially for small cars.**
- **Today's North American vehicle industry is regionally integrated, highlighting the importance of transportation infrastructure.**