



Industria Nacional de Autopartes, A.C.

INA

☐ VISION:

Being the most important Organization representing companies in the automotive parts sector with manufacturing interests in Mexico.

☐ MISSION:

Supporting growth and sustainable development of its members through the promotion of the global market and manufacturing of automotive and auto parts industry in Mexico.

☐ GOAL:

Leaning on the importance of the sector and the companies that comprise it, to achieve the best representation with government authorities (with special emphasis on the federal government), the automotive sector, academia and society in order to promote growth and development of auto parts industry in Mexico.

INA MEMBERS

We group the largest Automotive parts manufacturers worldwide with presence in Mexico.

LIGHT COMMERCIAL VEHICLE



AFTERMARKET



HEAVY COMMERCIAL VEHICLES



AFFILIATES, NON-AUTOMOTIVE



Industria Nacional De Autopartes, A.C.

STRATEGIC ALLIANCES

INA has created a group of working with various associations of the automotive sector in Mexico with this, we can achieve a better representation of Mexican automotive sector.



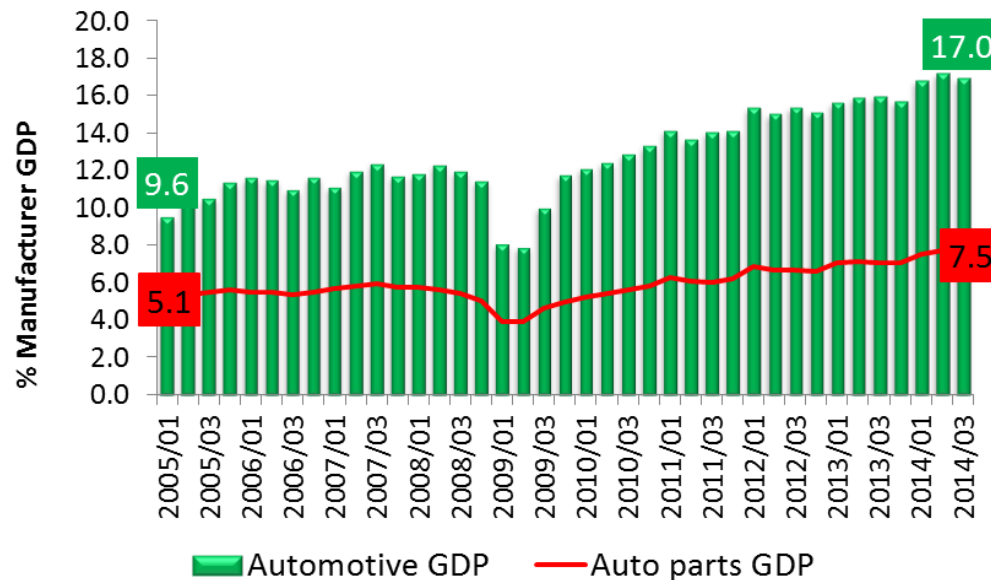
INA has cooperation agreements with associations worldwide



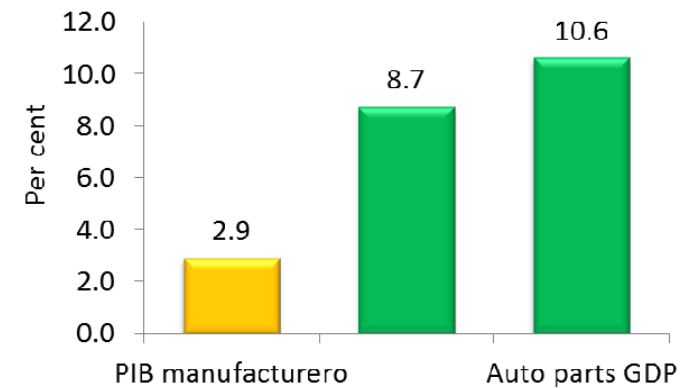
2. Mexico Perspectives

Automotive and Auto parts GDP

**Automotive and Auto parts GDP,
2005-2014**



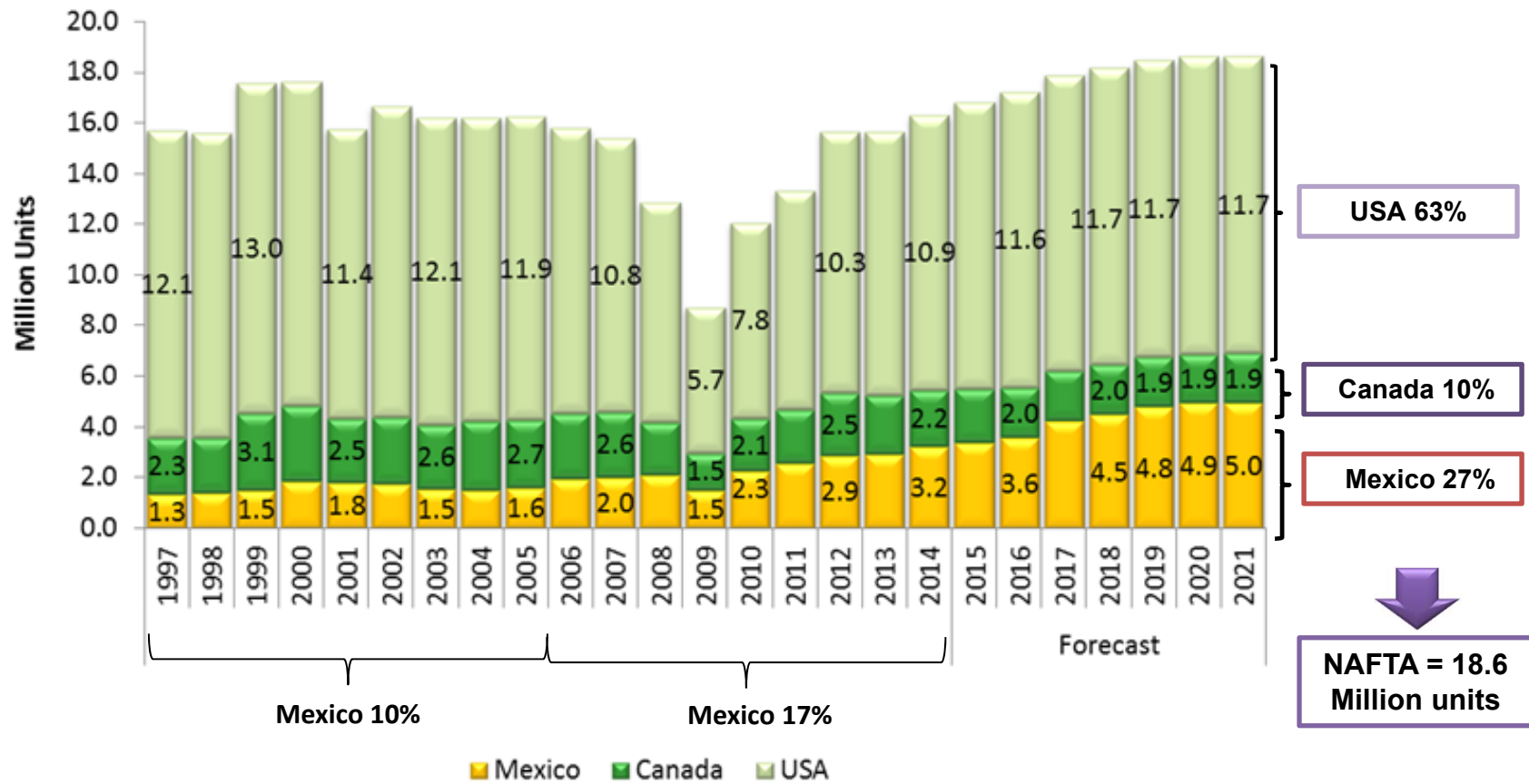
**Annual Average Rate of Growth,
2011-2014***



*Rates were calculated between third quarter of 2011 and 2014

Source: INA with information from INEGI

Light Vehicle Production in NAFTA Region



*From 1997- 2013 data from AMIA for Mexico and OICA for USA and Canada. From 2014- 2019 forecast from IHS Global Insight.

Source: INA with information from AMIA, IHS Global Insight and OICA

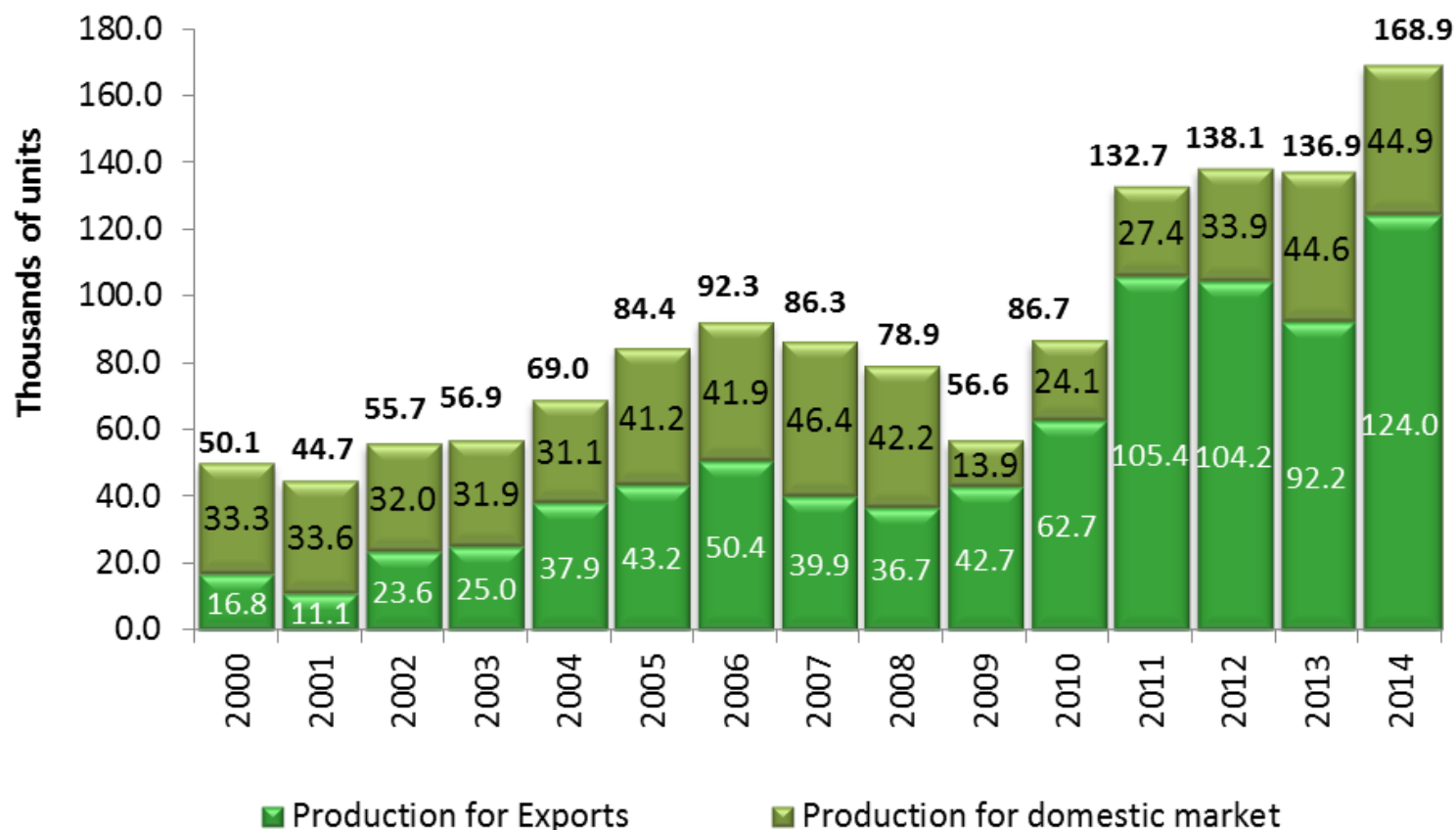
Forecast of Light Vehicle Production in Mexico, 2015-2021

Forecast of production of light vehicles in Mexico, 2015-2021							
(units)							
OEM	2015	2016	2017	2018	2019	2020	2021
Nissan	729,139	733,826	863,620	881,959	919,281	893,854	872,216
General Motors	668,254	628,132	782,899	806,774	804,149	786,907	768,558
Volkswagen	474,262	480,002	568,633	562,490	581,175	601,333	588,559
Ford	466,638	435,997	419,295	460,019	535,972	562,599	556,091
Chrysler	388,246	511,827	569,764	586,622	568,308	549,809	546,052
Honda	293,324	342,940	363,758	357,977	339,191	354,495	373,589
Hyundai	0	13,892	128,684	206,481	251,730	261,735	257,134
Toyota	85,468	119,122	120,762	143,635	243,724	244,063	247,661
Mazda	187,689	198,920	219,031	221,627	211,856	241,834	246,695
Daimler	0	0	24,070	108,836	148,445	192,417	203,069
BMW	0	0	0	0	46,431	97,975	163,825
Audi	0	61,786	143,197	155,777	152,405	143,484	134,500
Fiat	67,864	36,101	21,740	0	0	0	0
Total	3,360,884	3,562,545	4,225,453	4,492,197	4,802,667	4,930,505	4,957,949

Source: IHS

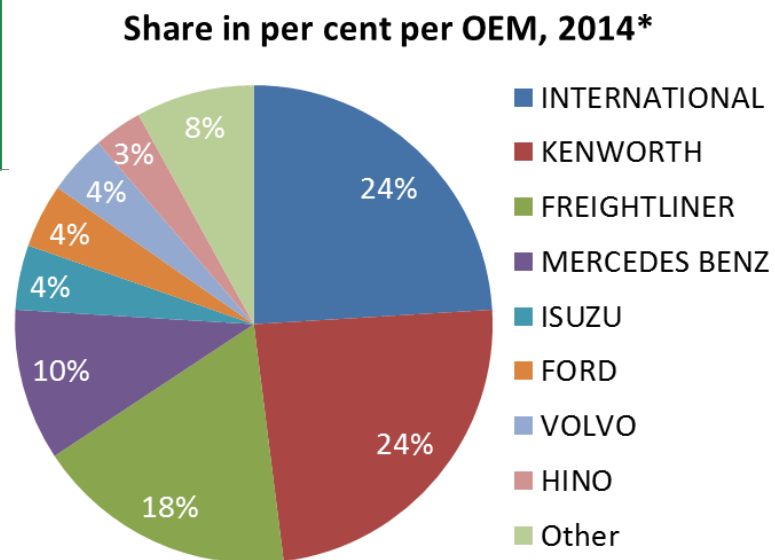
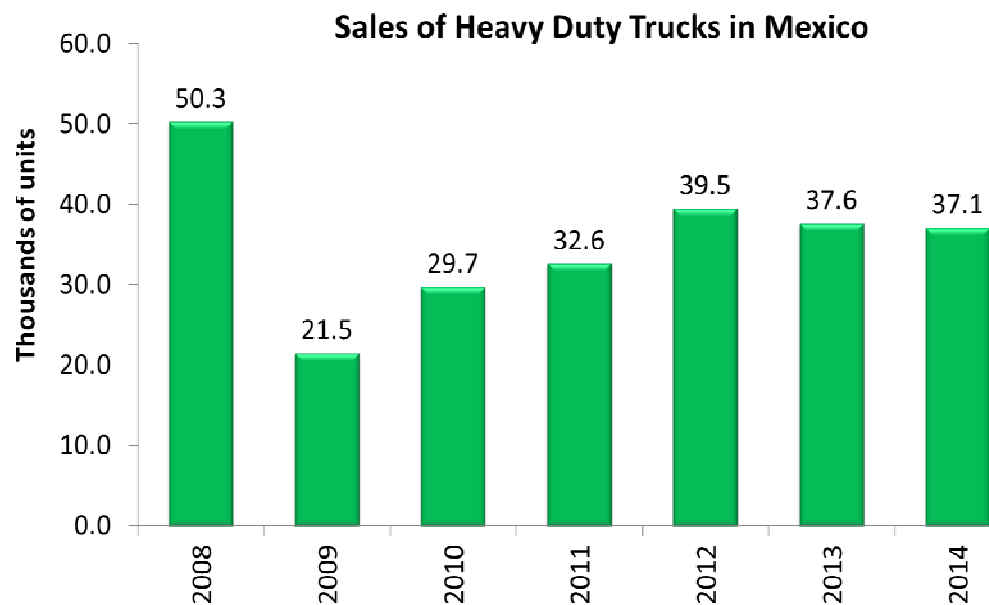
Source: INA with information from IHS Global Insight

Production and exports of heavy vehicles, 2000-2014



Source: ANPACT and Mexican Ministry of Economy

Sales of Heavy Duty Trucks in Mexico



*Estimated by INA

Source: ANPACT and Mexican Ministry of Economy



2.1 Mexico Auto Parts Perspectives

Auto parts manufacturers located in Mexico

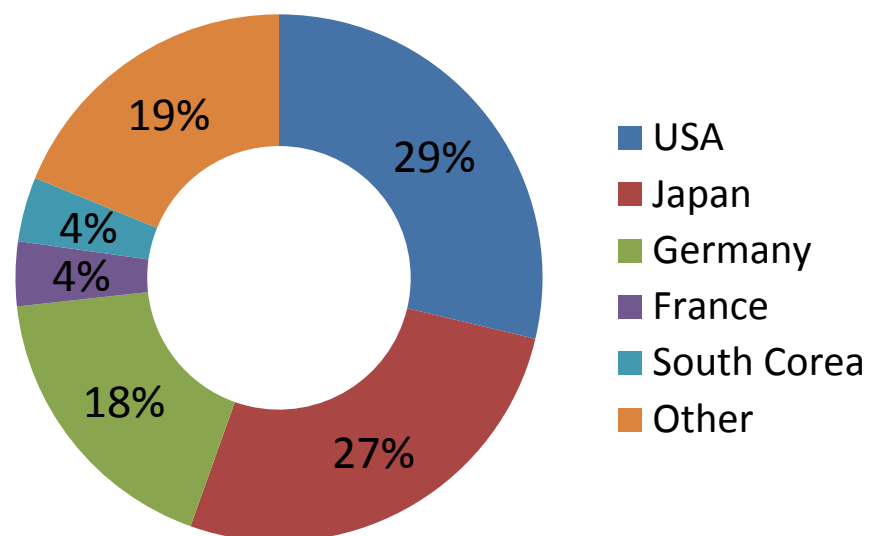
- The location of the most important auto parts around the world strengthens Mexican productive chain.

Example of auto parts manufacturers in Mexico



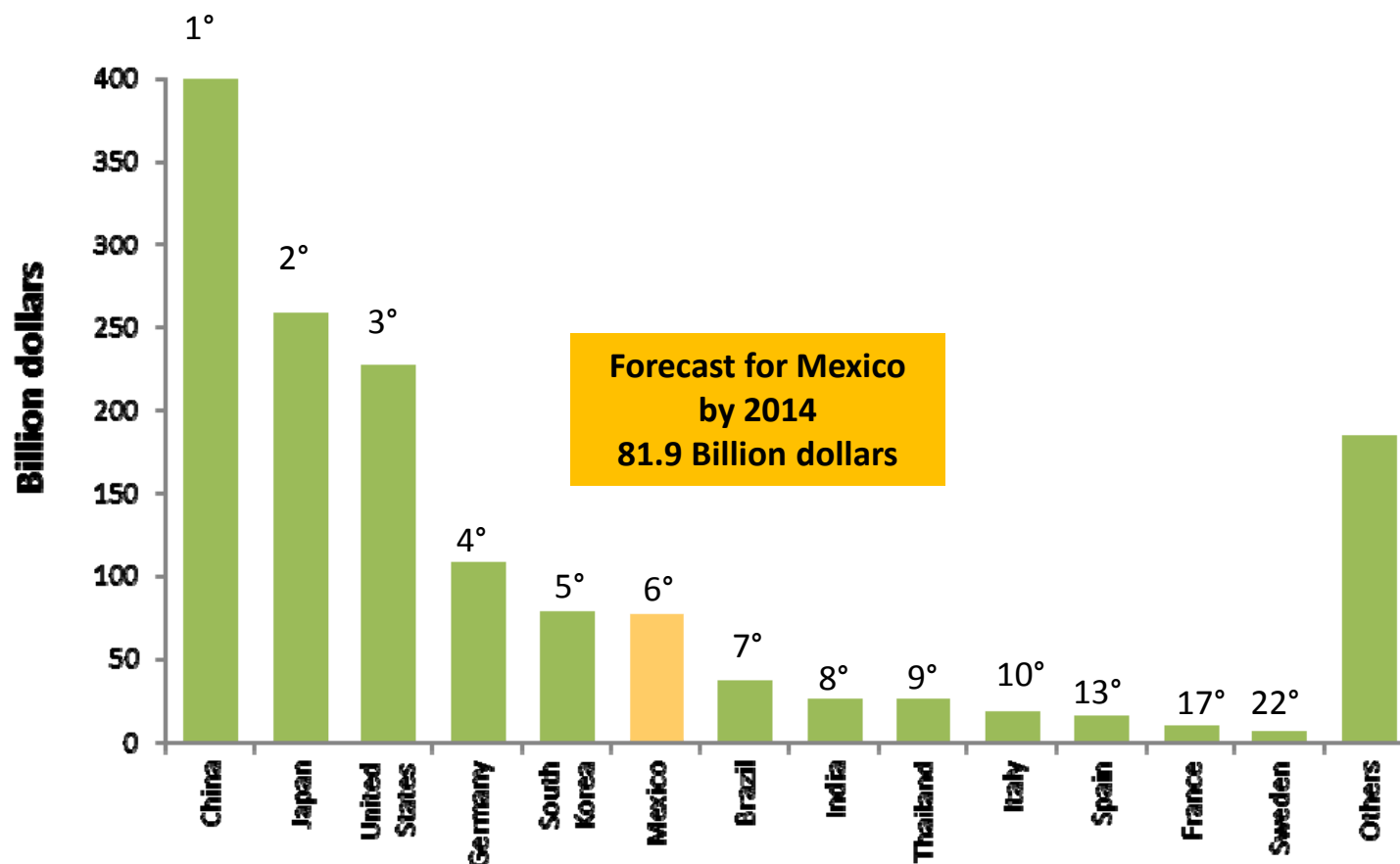
Source: ProMéxico

Origin of the auto parts manufacturers located in Mexico



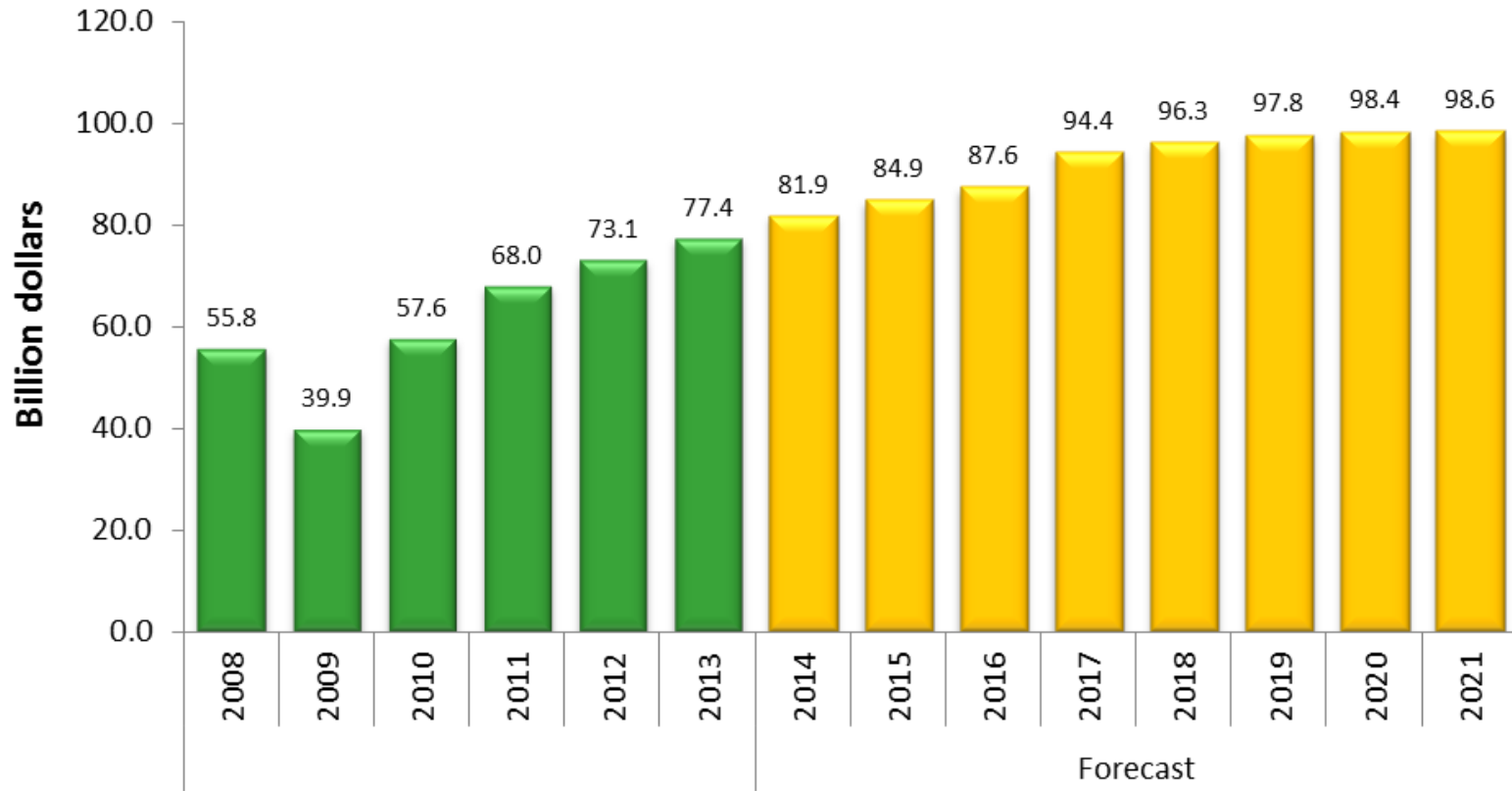
Auto parts production by country 2013

- During 2013 Mexico was the sixth largest producer of auto parts in the world with a production value of 76.8 billion dollars.



Source: ProMéxico with information from Global Insight and INEGI.

Auto Parts Production



Source: INA with information from INEGI, AMIA and IHS Global Insight

Mexican Exports & Imports of Auto Parts per Country, 2014*

Exports and imports of auto parts in Mexico, 2014*

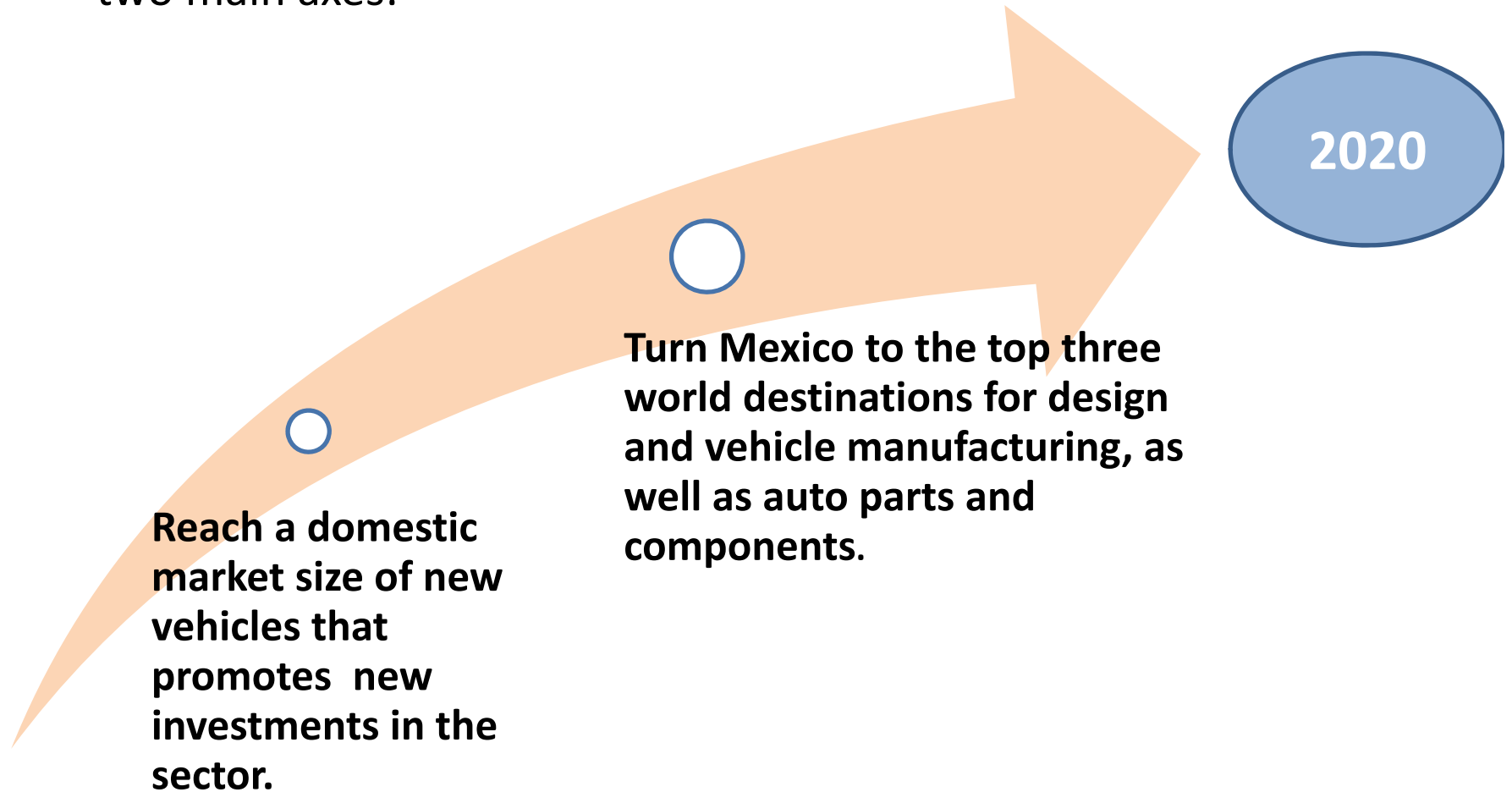
Country	Exports	%	Country	Imports	%
USA	55,529	90%	USA	21,817	55%
Canada	1,653	3%	China	4,688	12%
Brazil	836	1%	Japan	2,419	6%
Germany	419	1%	Canada	1,851	5%
China	414	1%	Germany	1,809	5%
United Kingdom	252	0%	South Korea	1,706	4%
Japan	197	0%	Brazil	632	2%
South Korea	196	0%	Nicaragua	542	1%
Thailand	158	0%	Taiwan	539	1%
Nicaragua	157	0%	Italy	432	1%
Sweden	6	0%	Sweden	52	0%
Total	61,650	100%	Total	39,964	100%
Balance trade	21,686				

Forecast to 2014

Source: INA with information from Global Trade Atlas

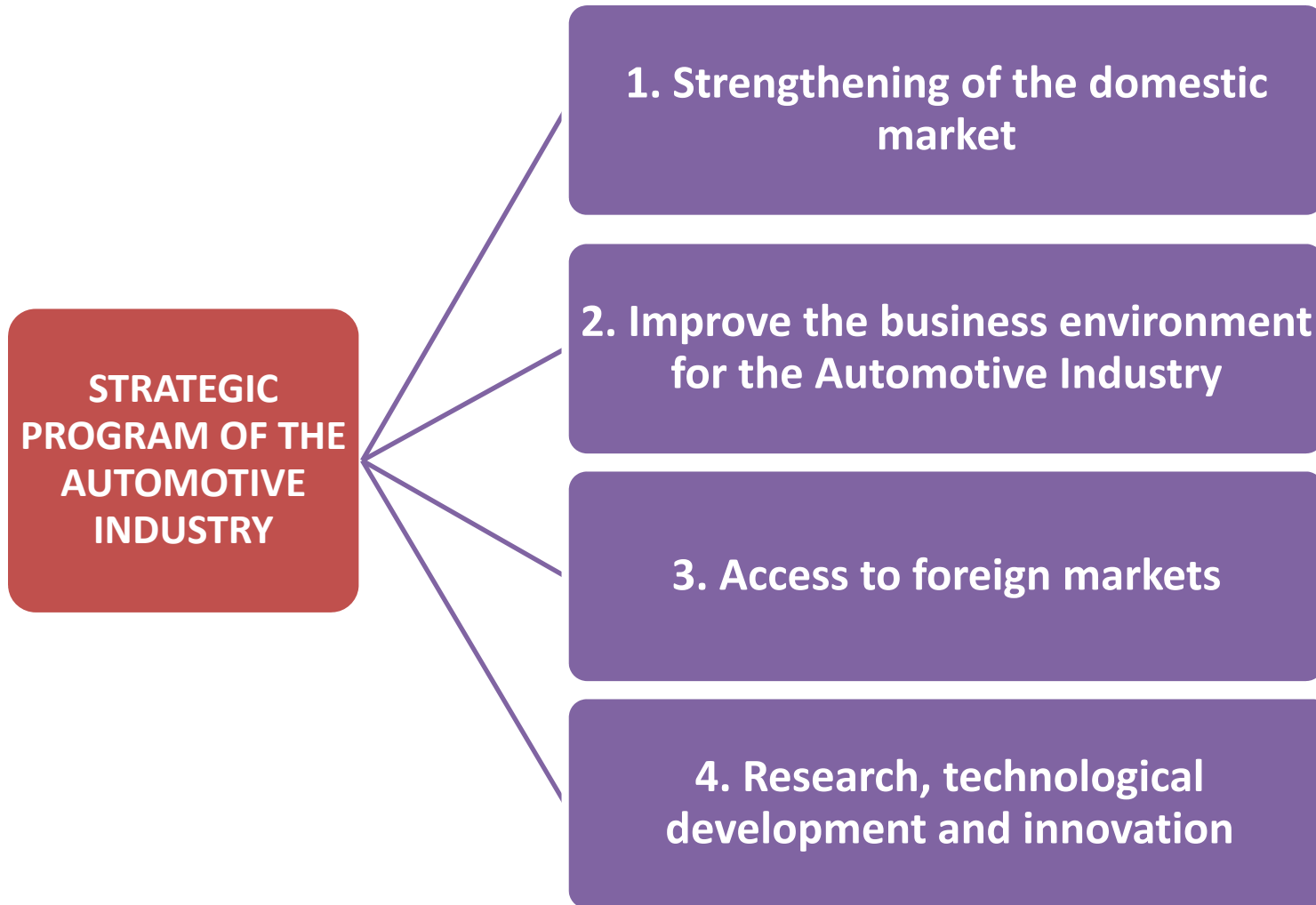
Program Vision

- The vision of the Mexican Automotive Industry is integrated by two main axes:



Pillars of the Program

- It was agreed to work on 4 pillars :





Thank You

Ing. Oscar Albin
President

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