Sourcing Trends in the Auto Industry

New Access to Energy – Midwest and Global Impacts
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Vehicles produced where sold

U.S. light vehicle sales by major production region

NAFTA

Asia

Europe
Within NAFTA, gains for Mexico

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Share of light vehicle production
Exports drive Mexico’s growth

[Graph showing trends from 1985 to 2012]
Parts exports: Mexico growing

- Add chart of MVP exports from US by destination (Canada will lead the pack; hoping that Mexico’s share will show growth)
Parts imports: Mexico extends its lead

US motor vehicle parts imports (%)

Source: ITC dataweb
Summary

• North America continues as important light vehicle production location; evidence of re-shoring in recent years.

• Within North America, Mexico is gaining vehicle production share. Currently, re-shoring from Asia to North America leads to Mexico, especially for small cars.

• Integrated North American vehicle industry allows for regional spillovers.