

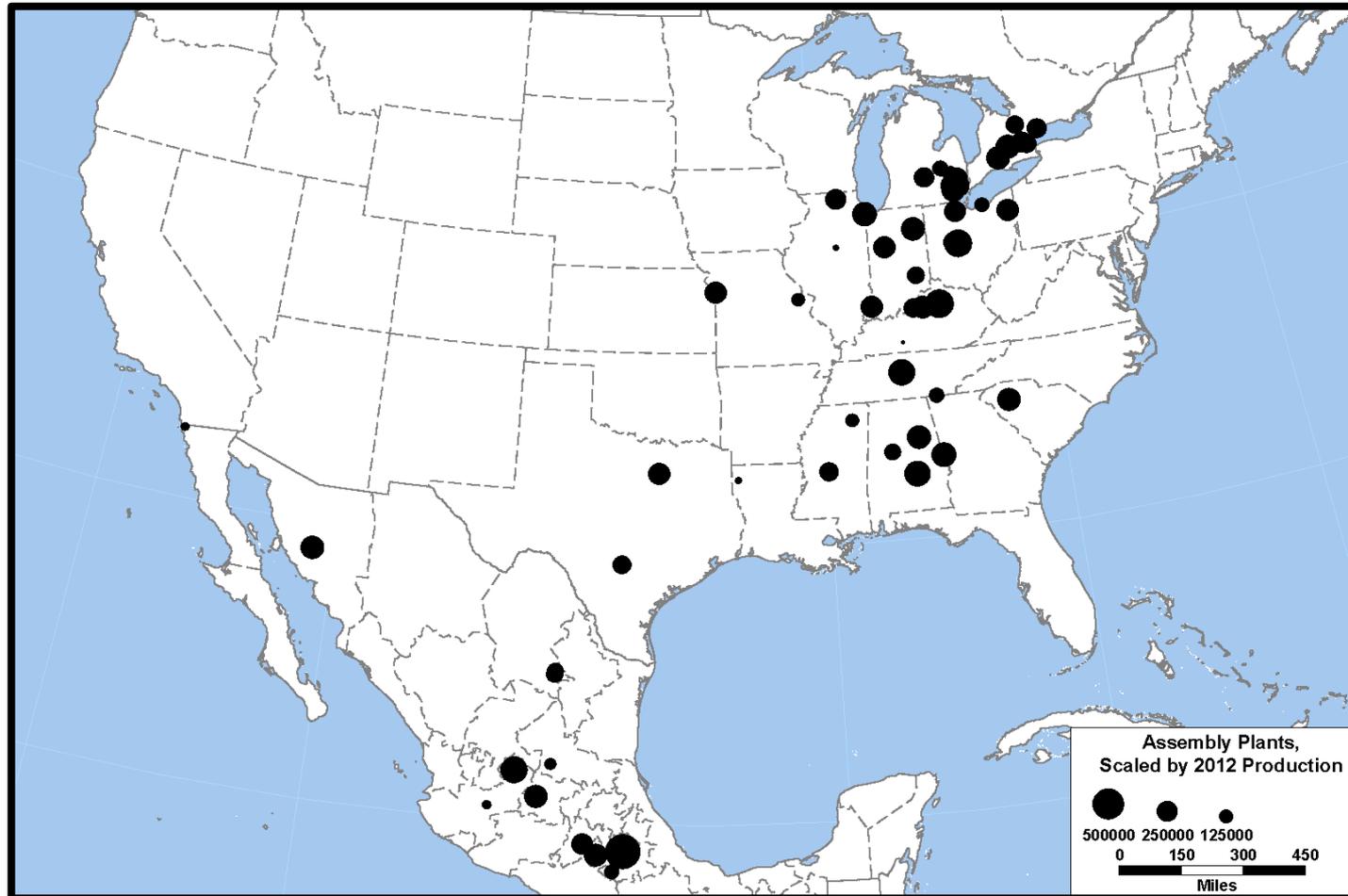
Sourcing Trends in the Auto Industry

New Access to Energy – Midwest and Global Impacts
Detroit, MI
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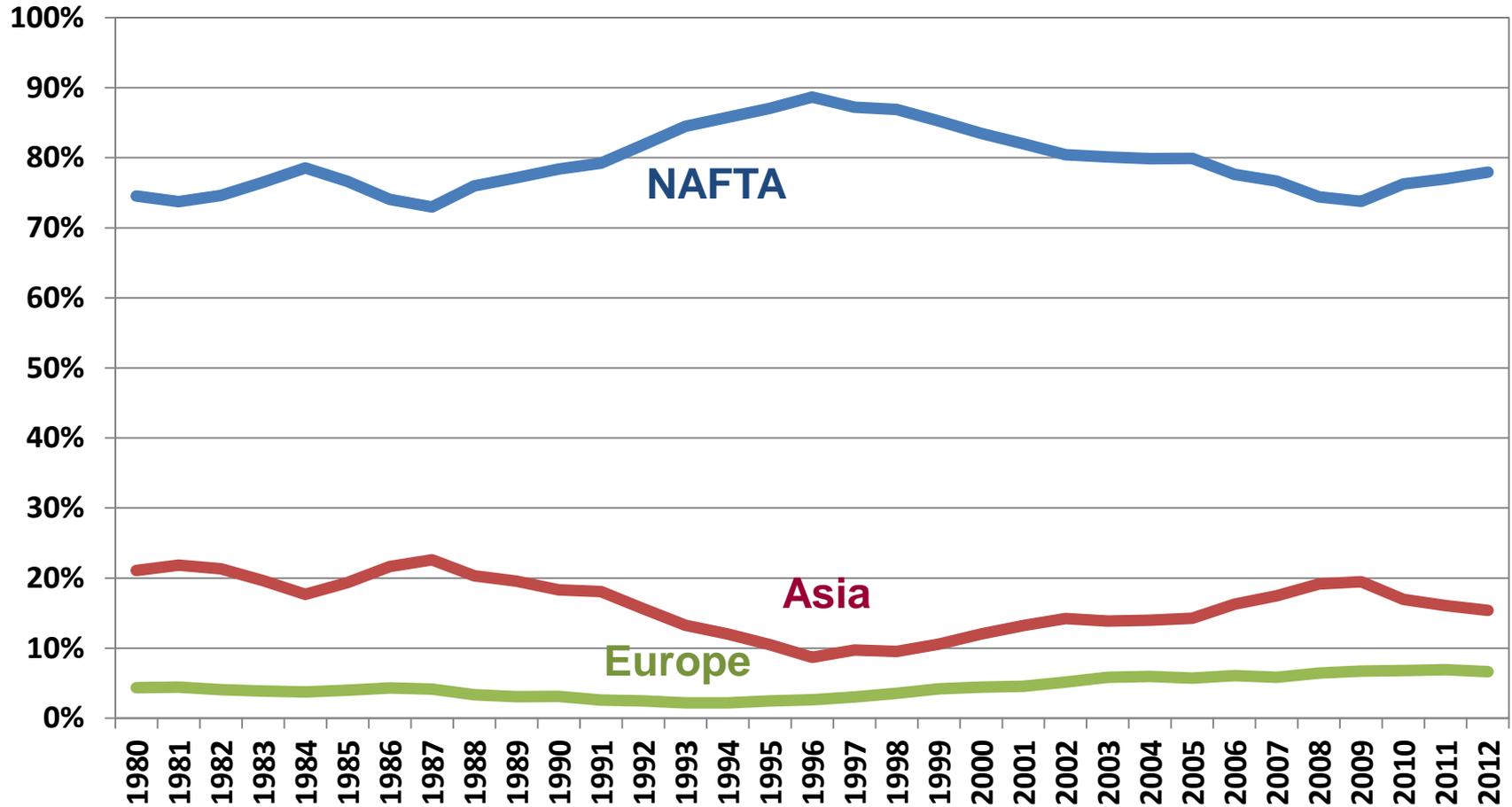
North America: LV production map



2012

Vehicles produced where sold

U.S. light vehicle sales by major production region

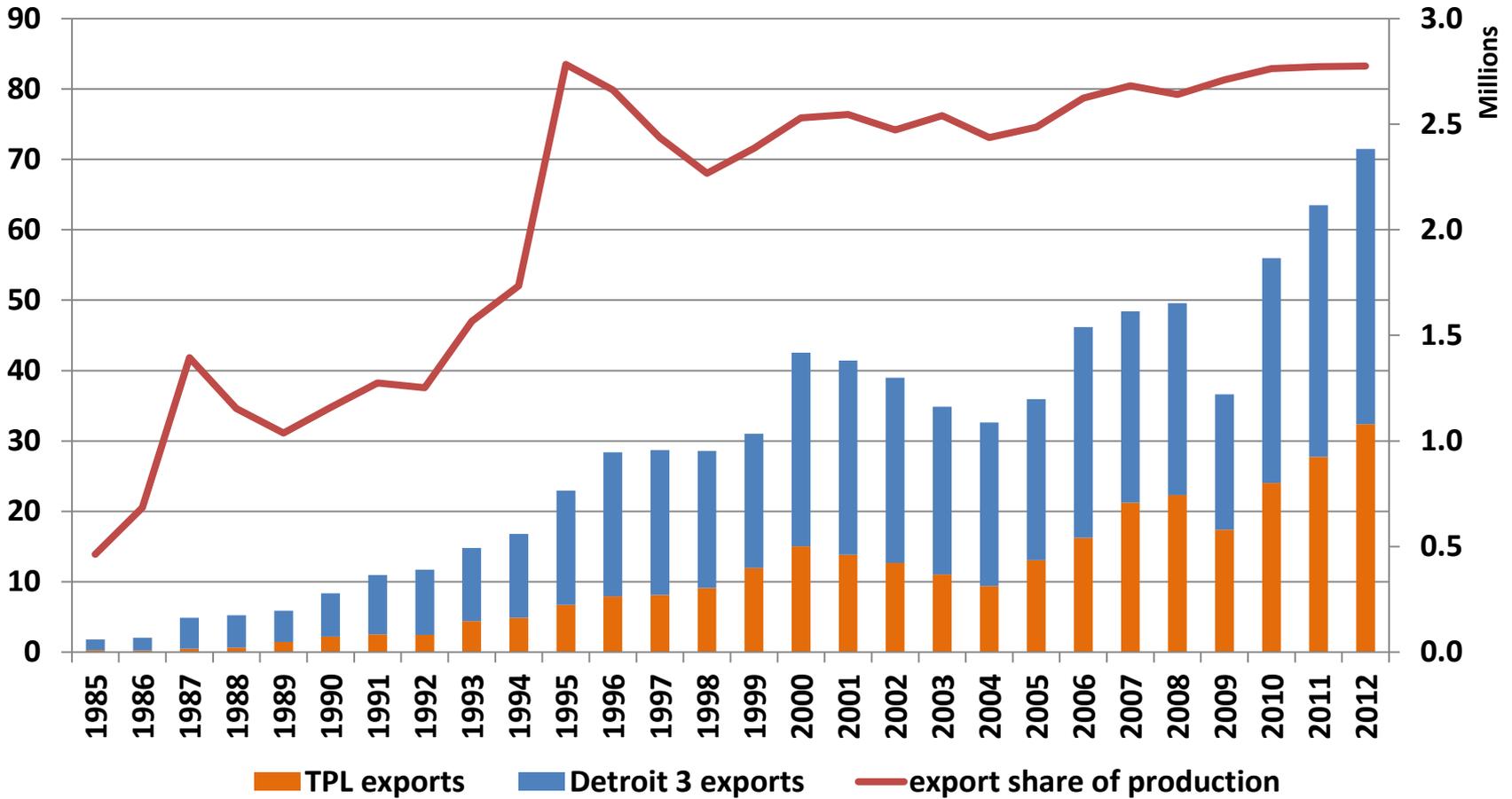


Within NAFTA, gains for Mexico

Share of light vehicle production

| Country | 1990 | 2007 | 2012 |
|------------|------|------|------|
| Canada | 16 | 17 | 16 |
| Mexico | 6 | 13 | 19 |
| U.S. | 78 | 70 | 65 |
| N. America | 100 | 100 | 100 |

Exports drive Mexico's growth

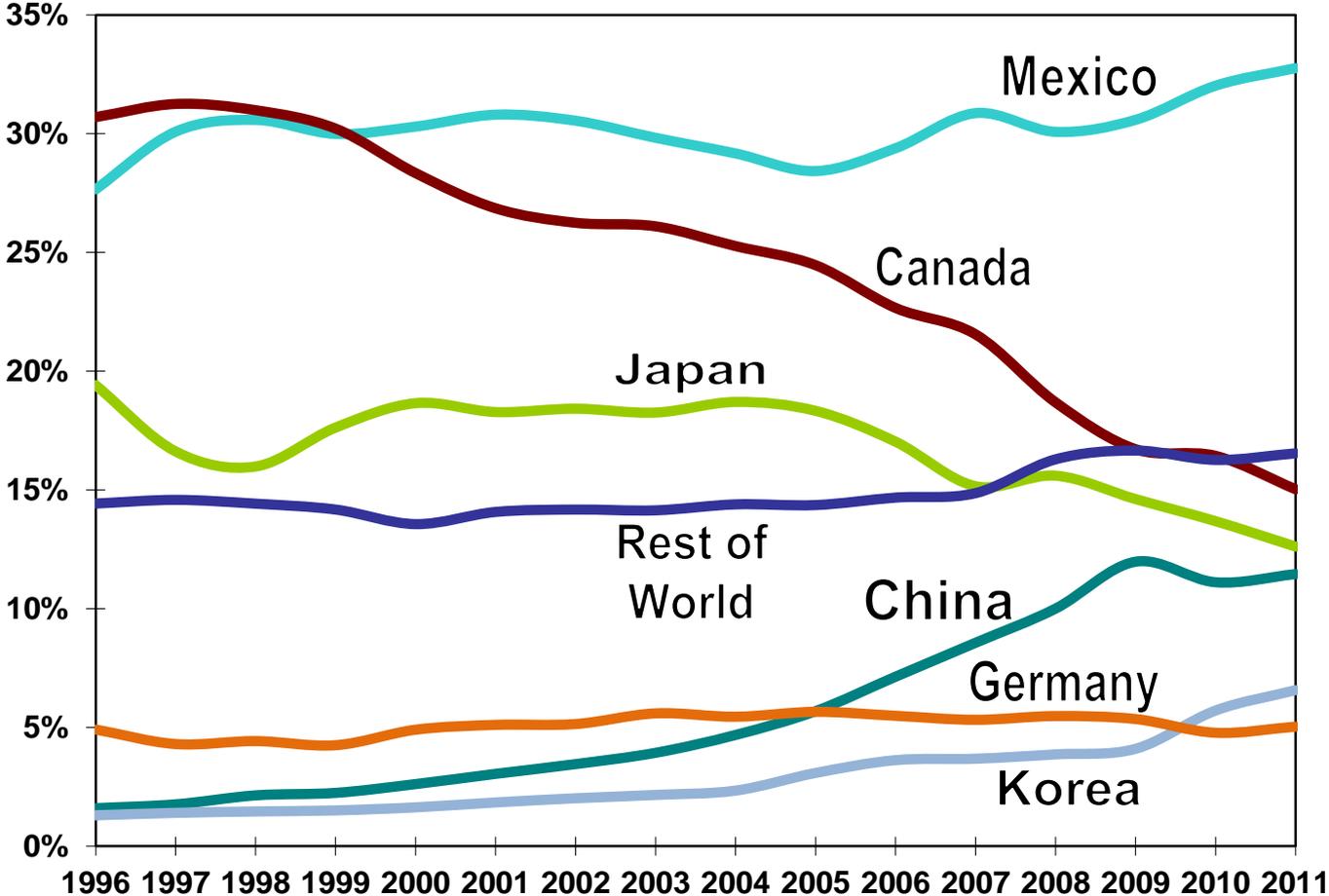


Parts exports: Mexico growing

- 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.**