

MEXICO *NOW*

Mexico's Auto Industry Conference

Industry Analysis - Opportunities for Suppliers

**Puebla, MX
December 4-5, 2013**

MEXICO'S AUTO INDUSTRY CONFERENCE

Heavy Vehicle Industry in Mexico

Puebla, Puebla. December 4, 2013

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Who we are?

In 1992 emerges the National Association of Bus, Trucks and Tractor Manufacturers, as the representative organization of manufacturers of heavy duty vehicles and diesel engines in Mexico. Today we have 14 members.

8 States of Mexico have heavy duty vehicle manufacturing plants: Baja California, Coahuila, Mexico State, Guanajuato, Hidalgo, Nuevo Leon, Queretaro and San Luis Potosi.

Who we are?

UBICACIÓN DE PLANTAS



Industry Statistics

Heavy Duty Vehicle Automotive Industry

- The 7th world producer, 3rd in America.
- The 4th world exporter.
- Manufacturing represents 5.2% of GDP.
- 143,900 employment, 22,000 direct and 122,000 indirect.
- 174,000 units is the installed capacity currently in Mexico.

Industry Statistics

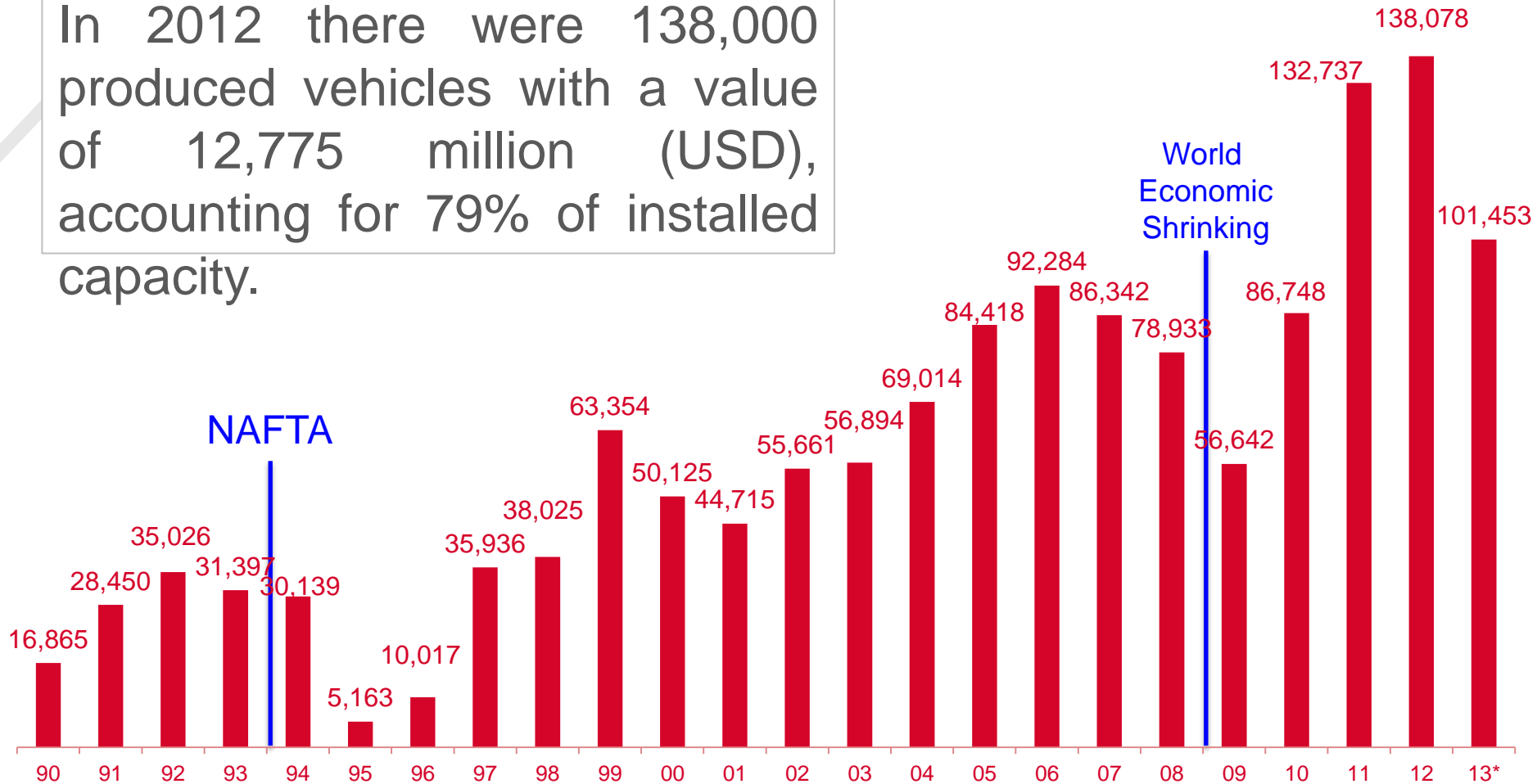
Motor Carrier Industry

- 4.9% of GDP in Mexico.
- 78% of the GDP of the Transport Sector.
- 2 million jobs.
- 453,000 thousand federal registered vehicles (with engine), which 84% is freight service.
- 82% of land cargo is mobilized on trucks (55.8% of total).
- 97% of passengers travel on buses.

Heavy Duty Vehicles Produced

1990-2013*

In 2012 there were 138,000 produced vehicles with a value of 12,775 million (USD), accounting for 79% of installed capacity.



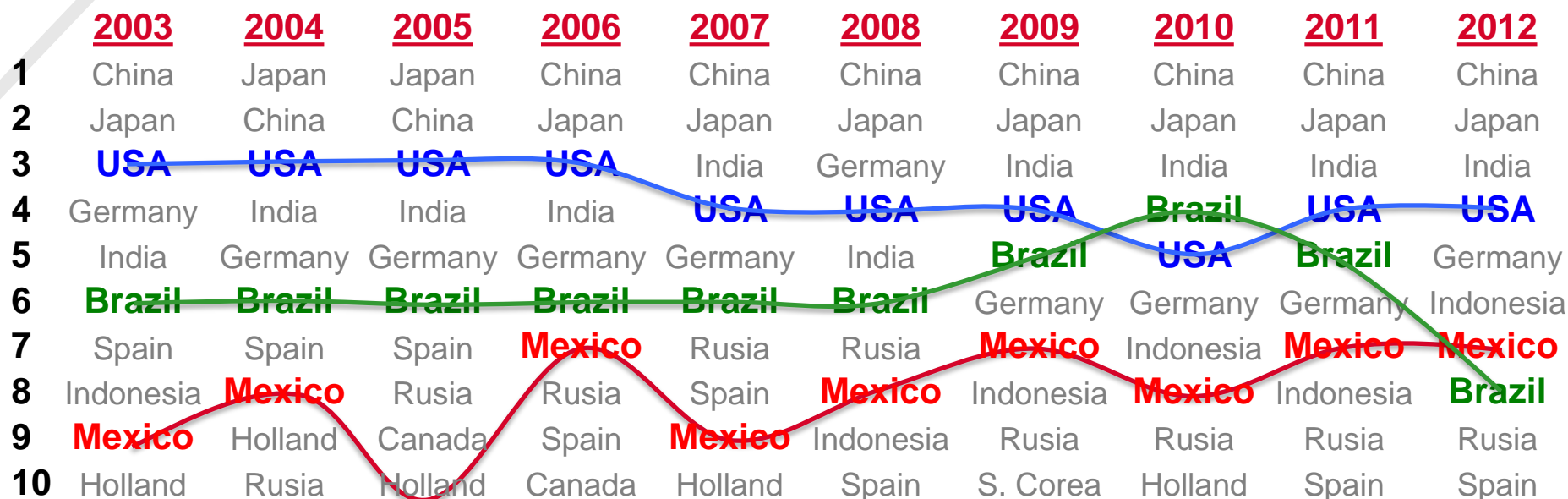
Heavy Duty Vehicles Exported

1990-2013*

20 years ago we exported only 1,000 units, today more than 100,000 annually.



World Ranking of Heavy Duty Vehicle Manufacturing



Fuente: OICA, Heavy Trucks 2003-2012

Market Share of Production in North America

North America	2003	2012	Difference
USA	75.6 %	60.3 %	- 15.3
Mexico	16.0 %	37.4 %	+ 21.4
Canada	8.4 %	2.3 %	- 6.1

Fuente: OICA, Heavy Trucks 2003-2012

Tendencies

The vision we have for the next 20 years is to reach 300,000 units:

- USA (270,000 Units)
- Brasil (132,000 Units)

Free Trade Agreements:

- Pacific Alliance
- Trans-Pacific Strategic Economic Partnership (TPP)
- Mexican Domestic Market

Pulse of Heavy Vehicles Industry

-14.7% Wholesales of Oct '12 vs '13

-4.4% Accumulated Wholesales from Jan to Oct '12 vs '13

-11.5% Accumulated Exportation from Jan to Sep '12 vs '13

-6.1% Accumulated Production from Jan to Sep '12 vs '13

+86.2% Imported Used from USA from Jan to Oct '12 vs '13

Sustainable Strategic Plan = Internal Market Growth



Thank You!

Miguel H. Elizalde Lizarraga

elizalde@anpact.com.mx

 @miguelhelizalde

www.anpact.com.mx

 @AnpactAC

 Anpact A.C.

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