

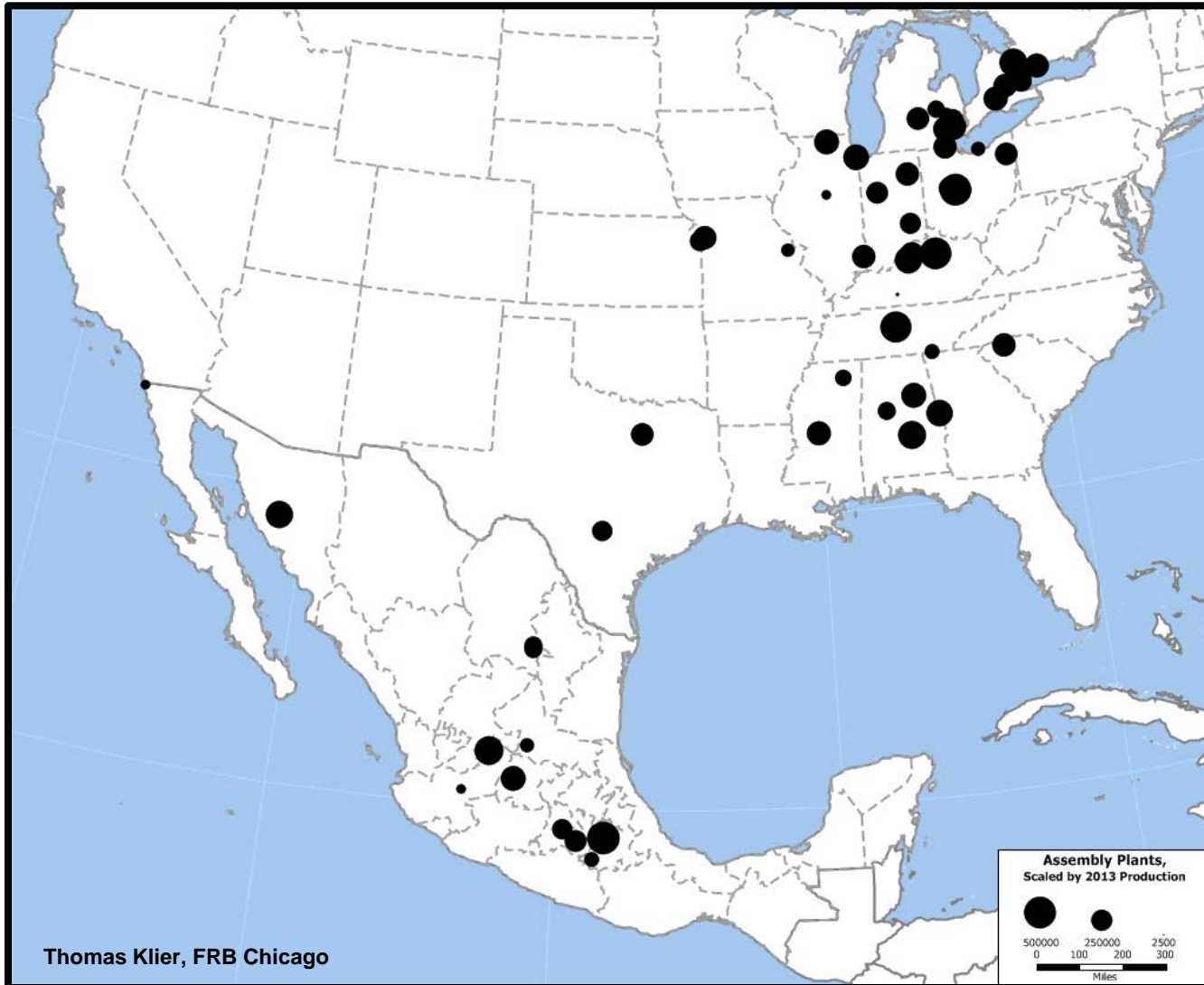
Automotive linkages between the U.S. and Mexico

**NAFTANEXT Summit
Chicago, IL
April 23, 2014**

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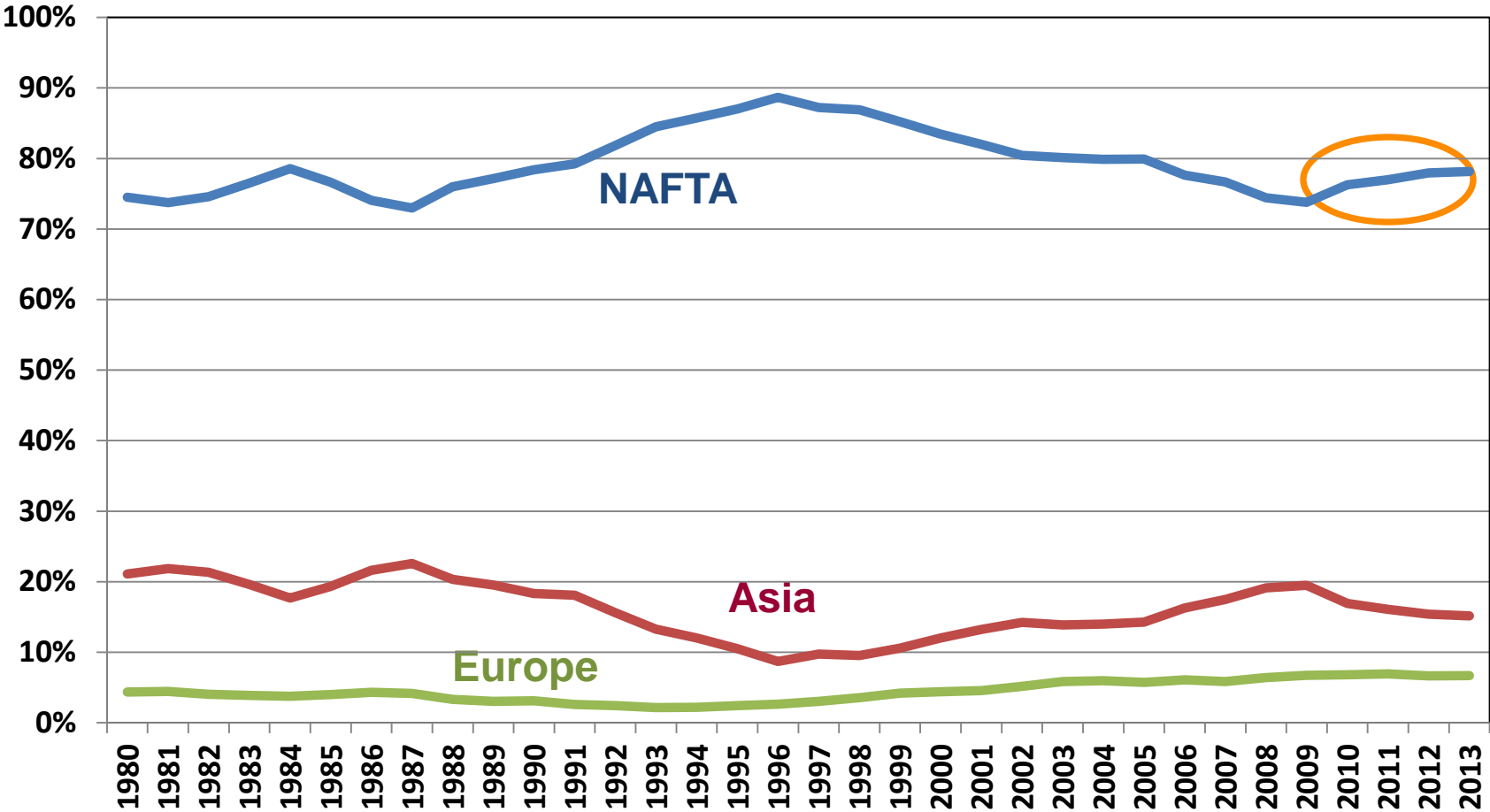
Vehicle production in North America

2013



Most vehicles produced where sold

U.S. light vehicle sales by major production region



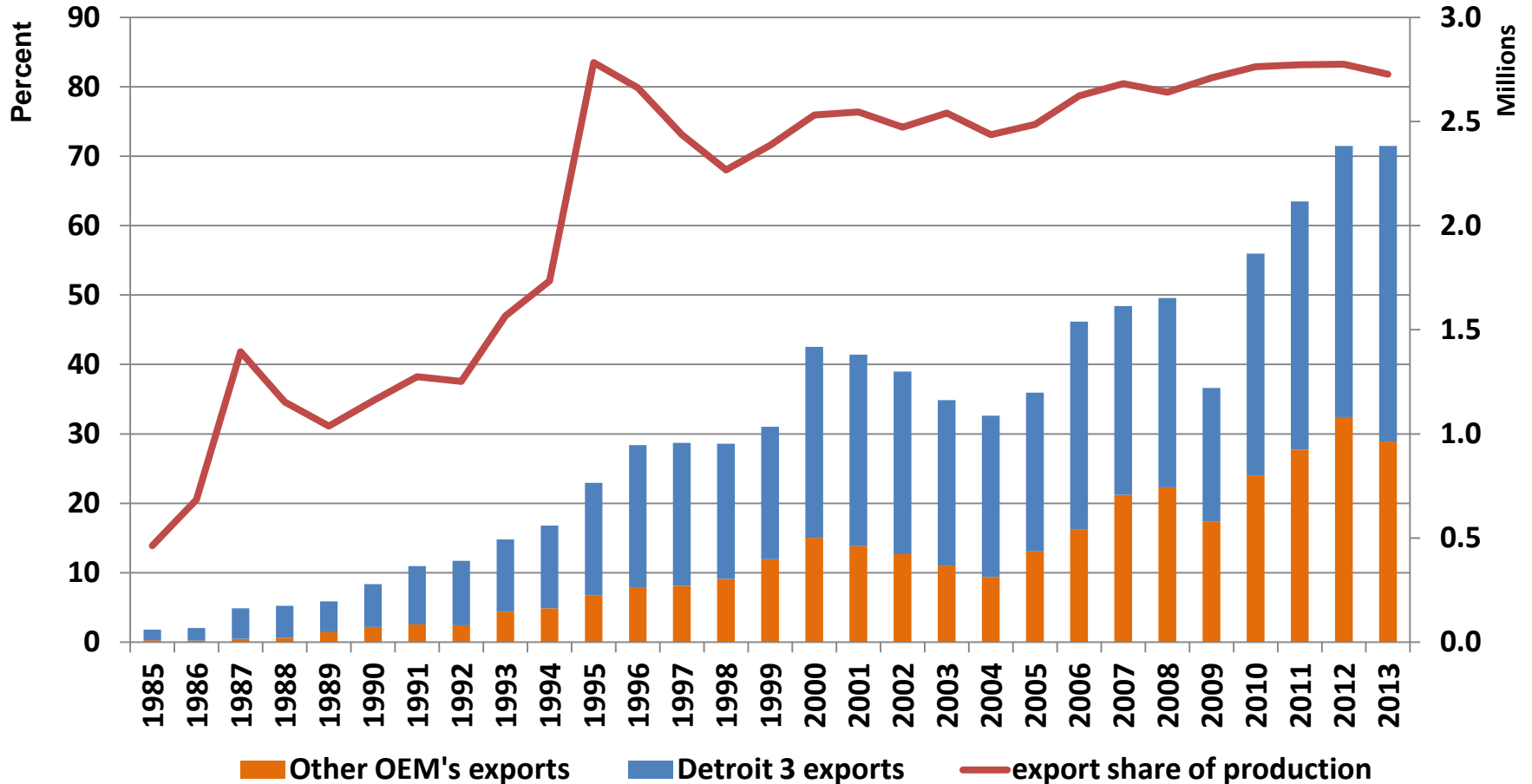
Within N. America, gains for Mexico

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

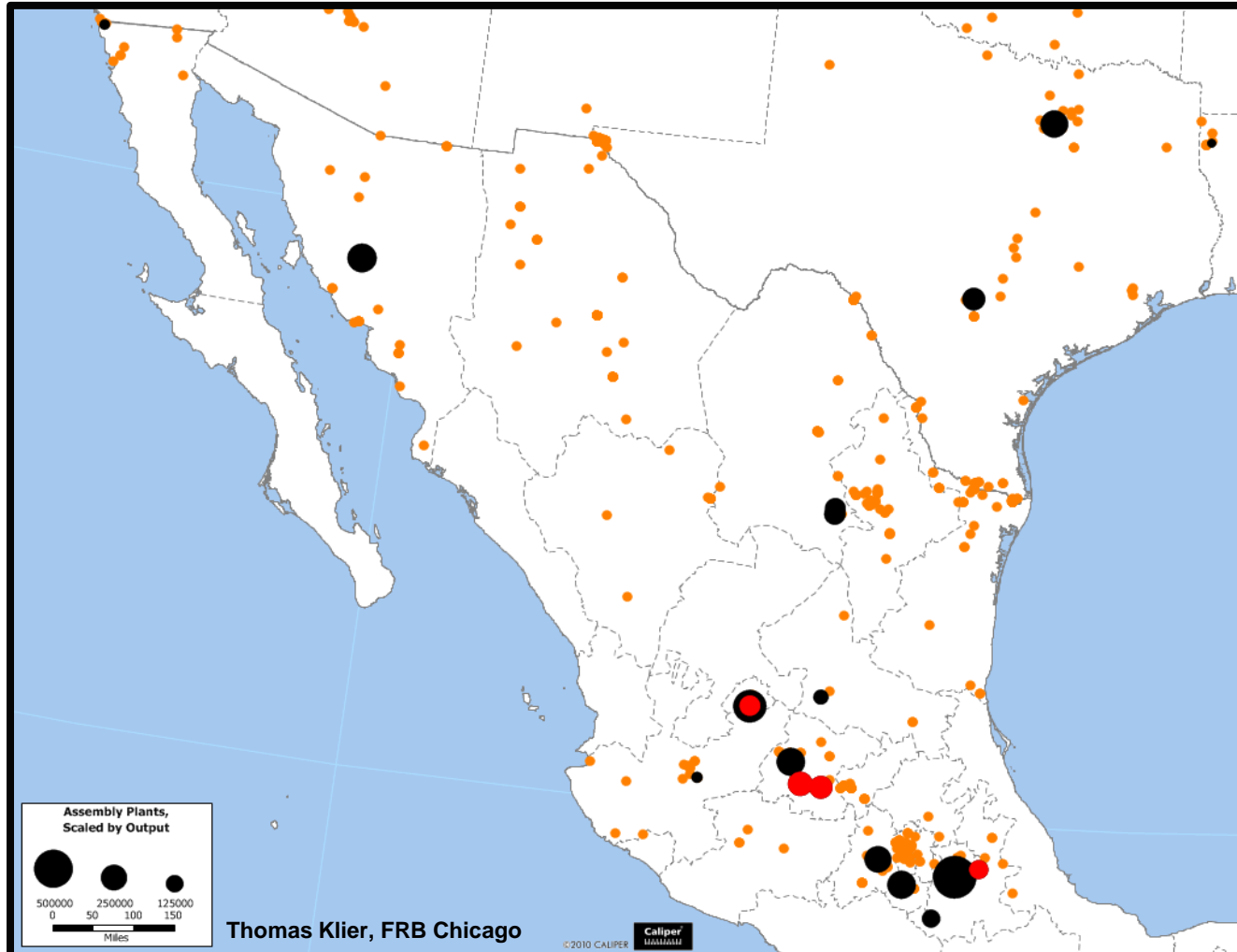
Vehicle exports from Mexico by destination

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.

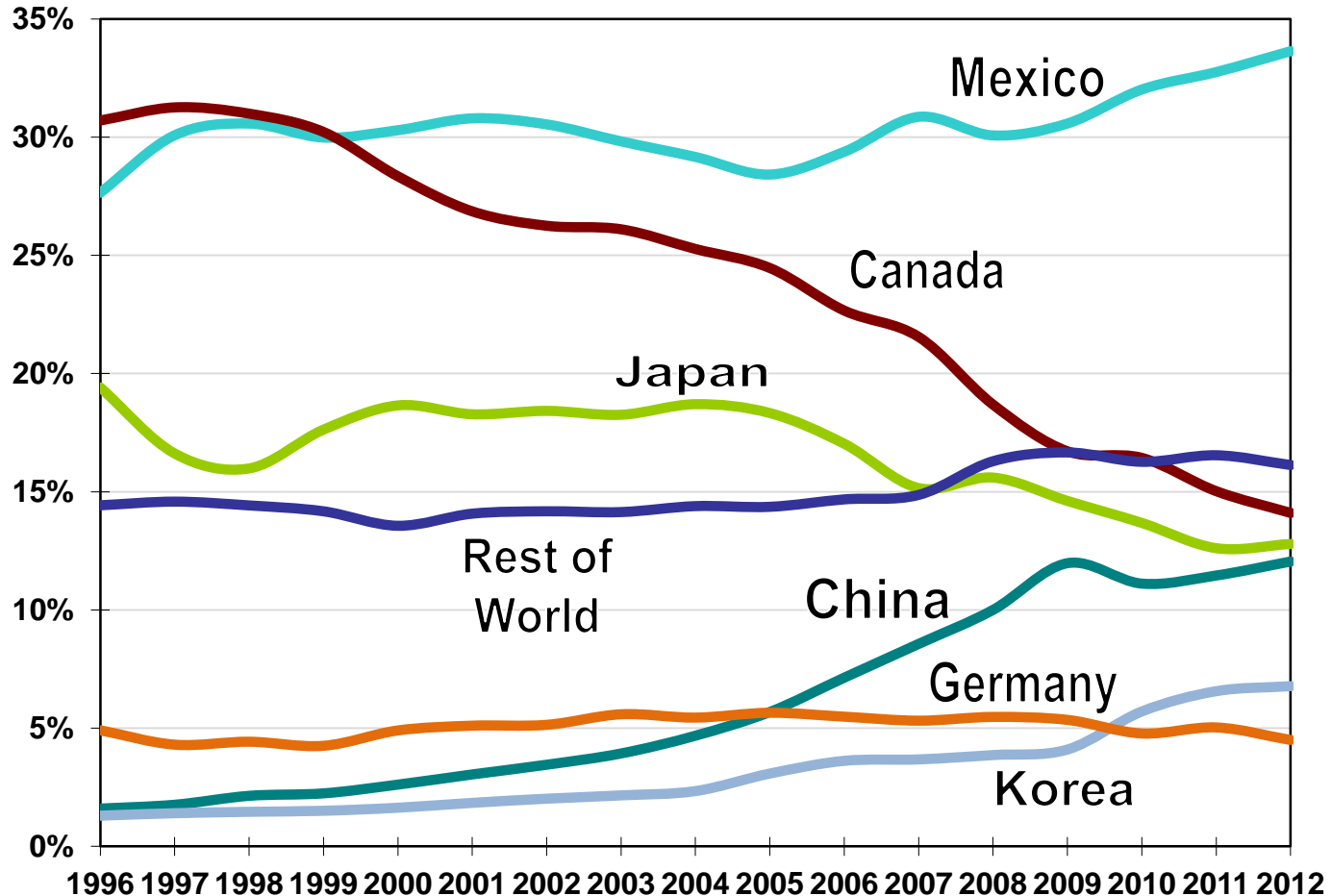
Mexico's auto footprint is growing

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



U.S. parts imports: Mexico extends lead

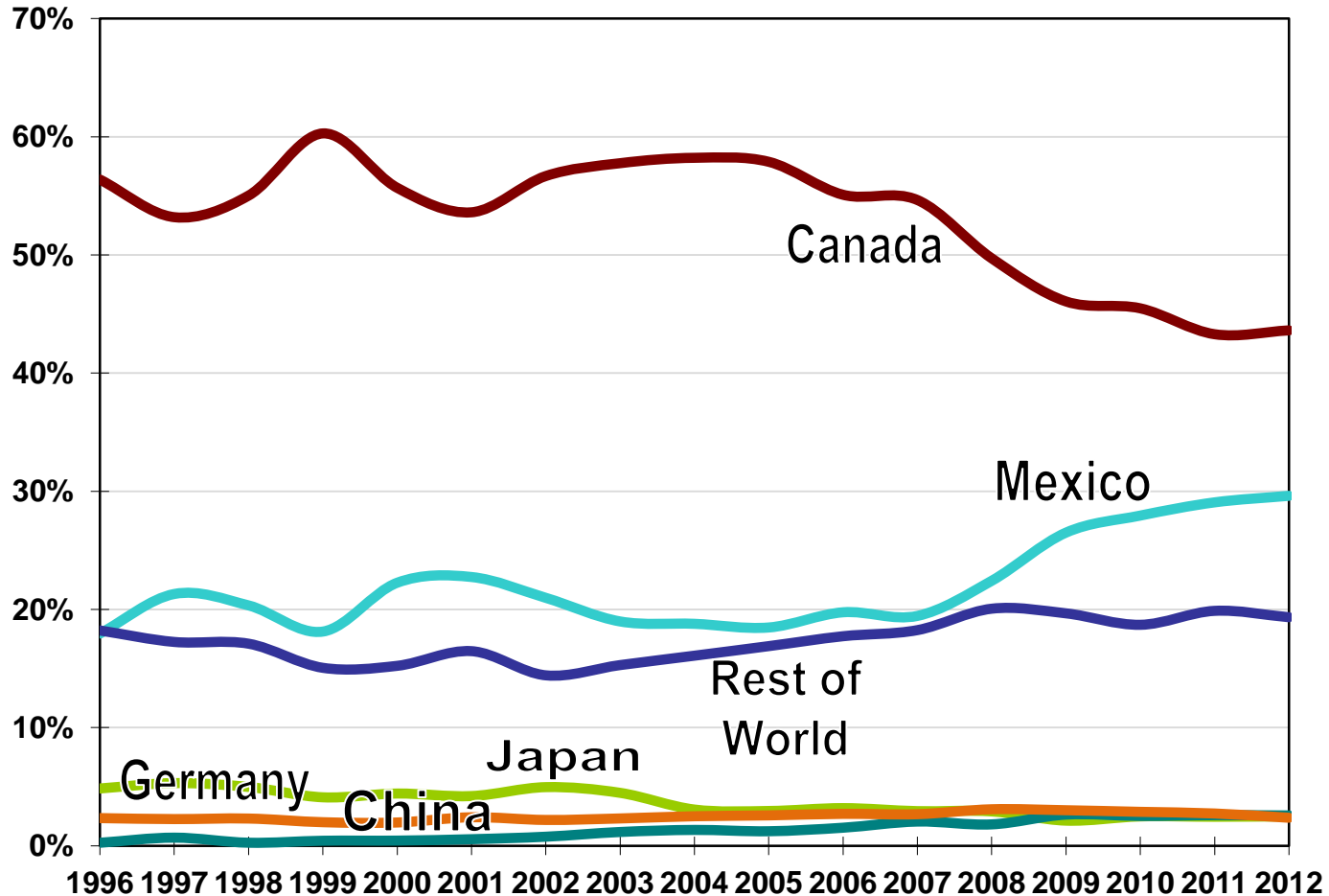
U.S. motor vehicle parts imports (%)



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.**