



Automotive Industry in Mexico

December, 2020



The Automotive Industry in Mexico

Light Vehicles



Commercial Vehicles



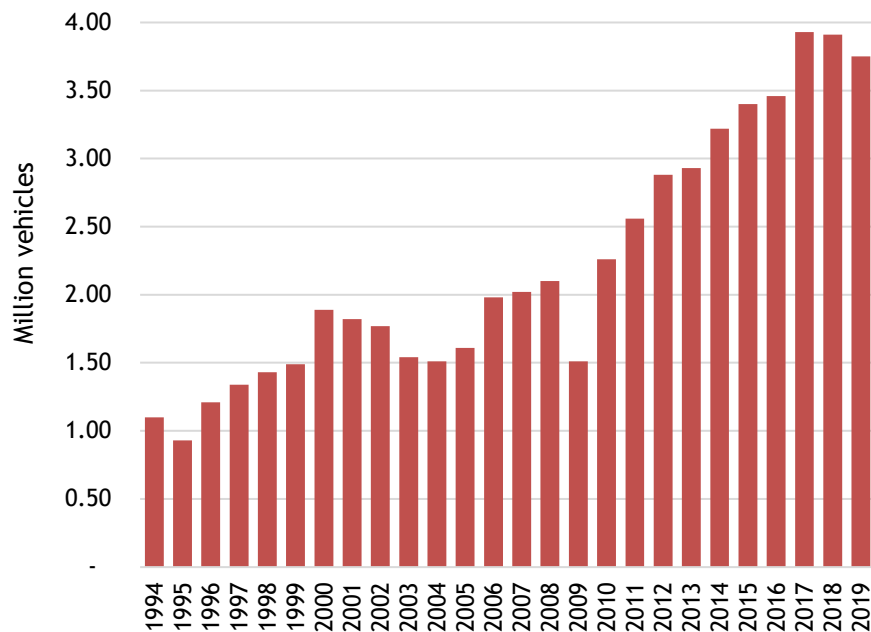
Practically all the world players are present in Mexico!



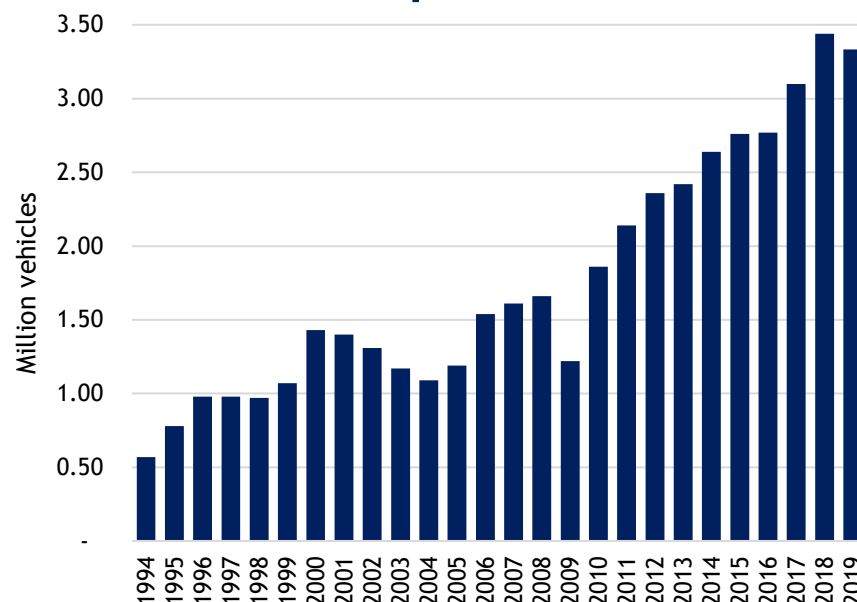
Mexican Production and Exports

Light Vehicles

Production



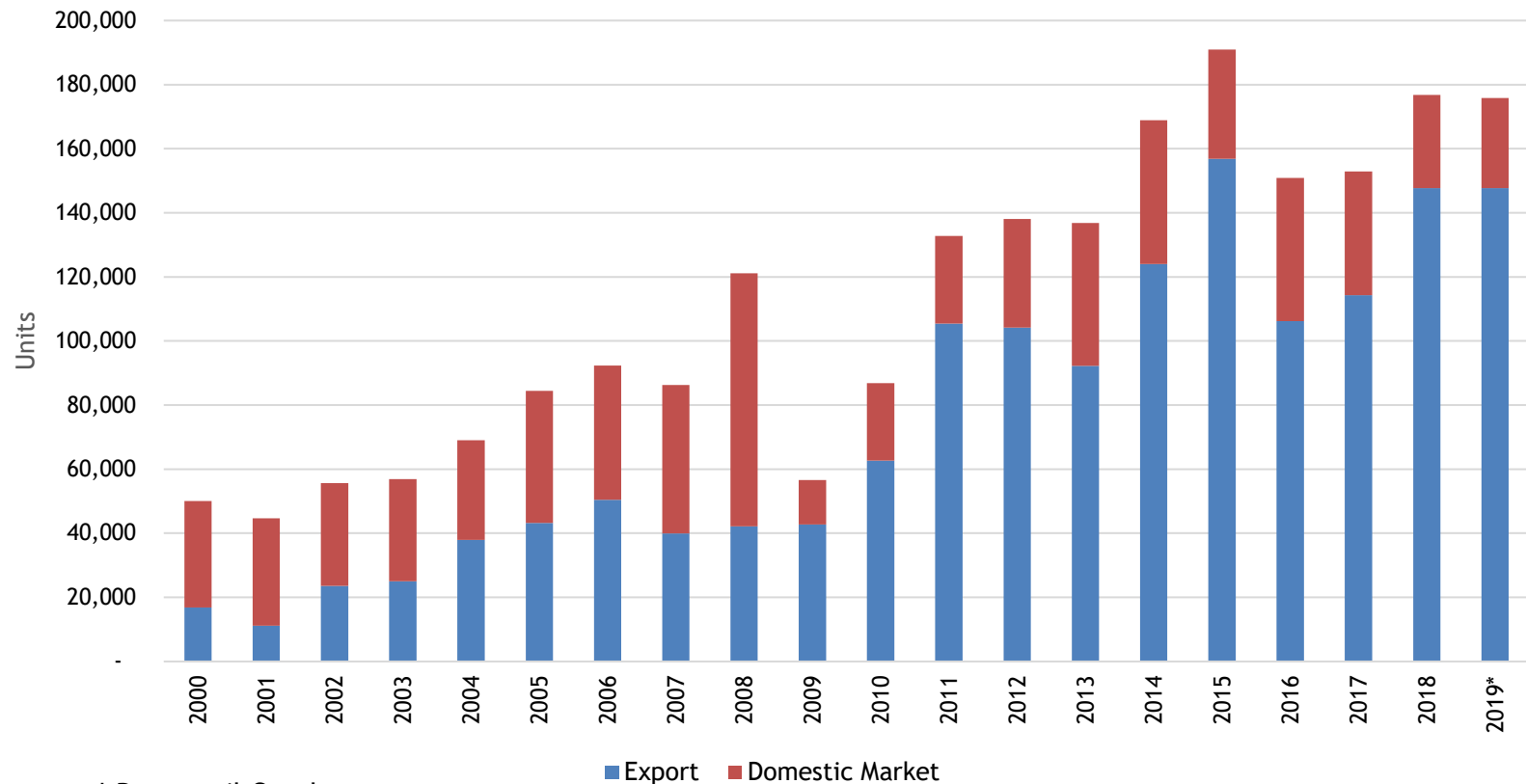
Exports



- Mexico contributes 4.2 % of world production.
- More than 88 % of the production goes to the export market.



Production of Heavy Vehicles in Mexico



* Data until October.

- The industry grew a little more than 3 times since the 2009 crisis.



Nuevo Leon as part of the Mexican automotive industry



It is the most important manufacturing industry in the country

It represents 20% of the national manufacturing GDP

March 2020



But

***The Coronavirus arrived to
North America!***

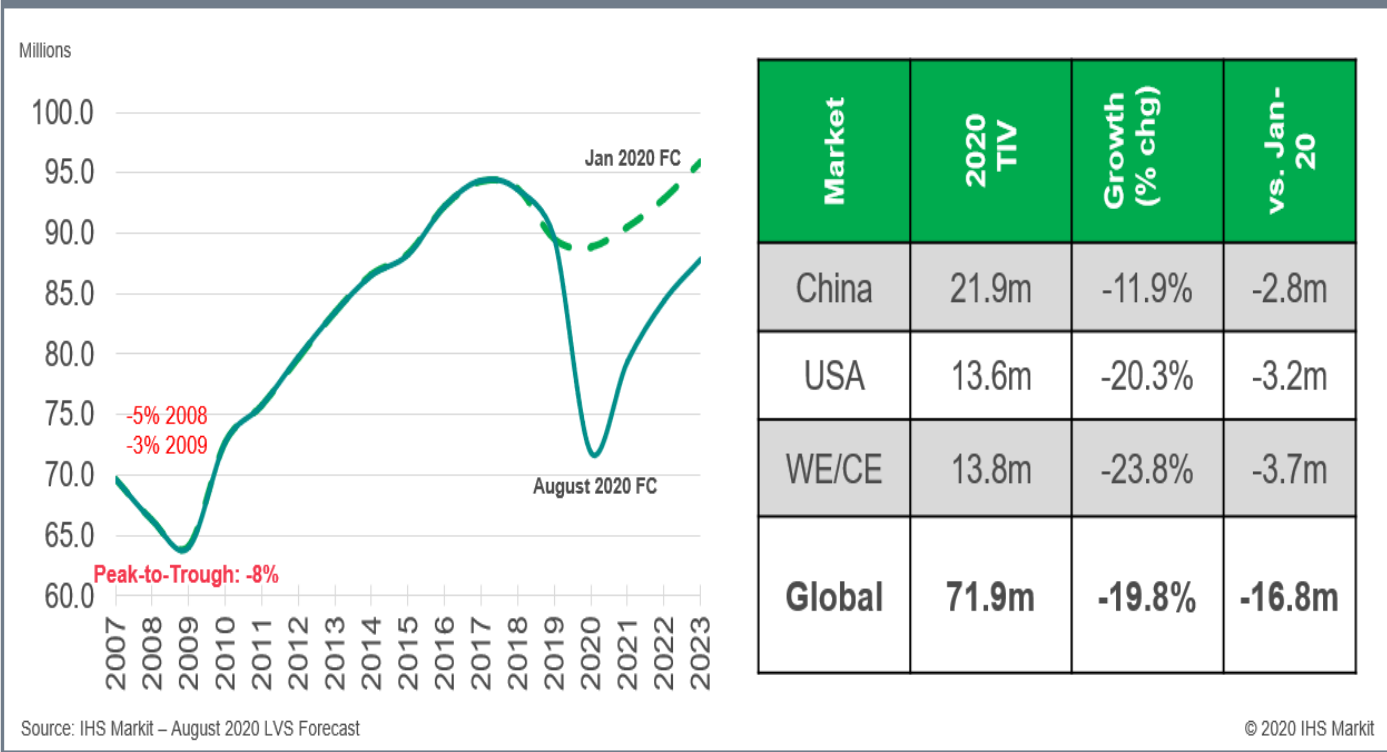
Global Situation due to Covid-19



RED NACIONAL DE CLUSTERS
DE LA INDUSTRIA AUTOMOTRIZ

Near-Term: Cautious Upgrades as Much of the World Re-opens – yet 2020 Autos Outlook Remains Far Worse than 2-year Decline During Great Recession of 2008/09

Global Light Vehicle Sales Outlook



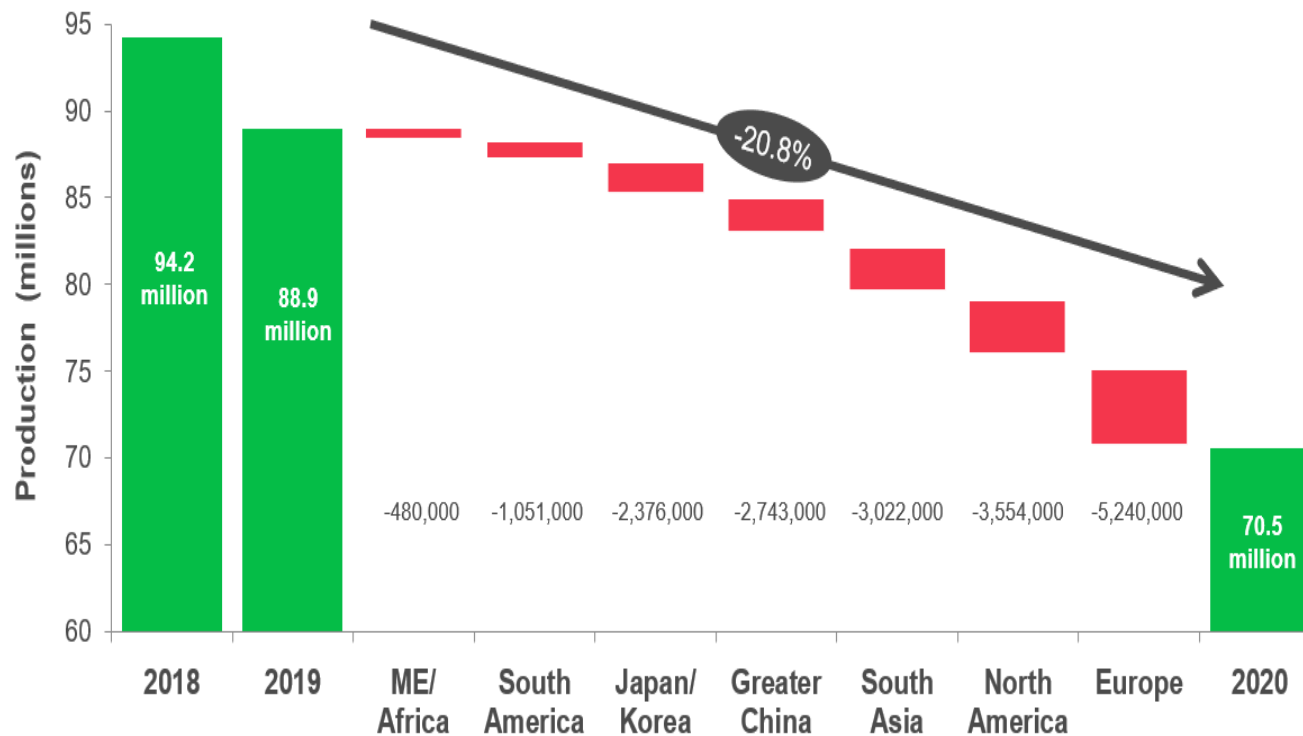
Global Production Impact



RED NACIONAL DE CLUSTERS
DE LA INDUSTRIA AUTOMOTRIZ

Global Light Vehicle Production

COVID-19 Impact Encompasses All Markets, Including Key Major Markets; Volatility Remains a Concern



Source: IHS Markit Light Vehicle Production Forecast

© 2020 IHS Markit. All Rights Reserved.



CLAUT
CLUSTER AUTOMOTRIZ DE NUEVO LEÓN A.C.

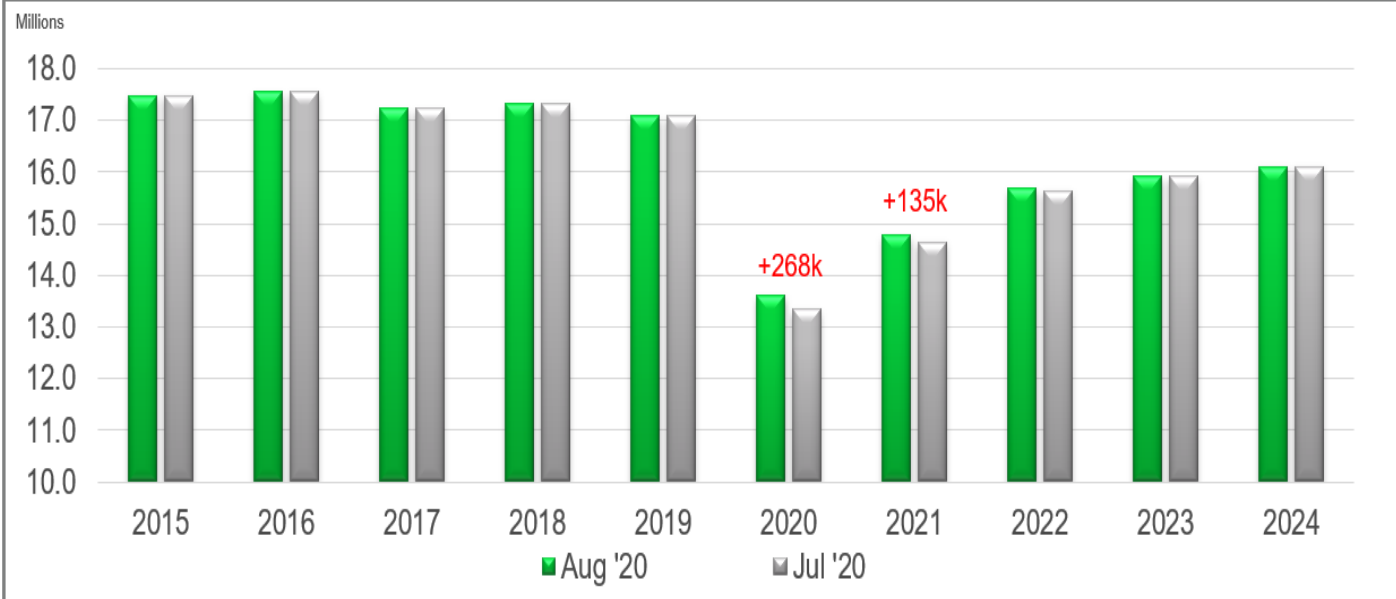
Global Situation – United States



US: July Sales Advance Recovery in Auto Demand Since April, but Uncertainty and Risk Remain in Second Half of 2020

RED NACIONAL DE CLUSTERS DE LA INDUSTRIA AUTOMOTRIZ

US: COVID-19 Impacted Light Vehicle Sales Forecast (August 2020)



	2020	2021	2022	2023
% Growth YoY	-20.3%	+8.6%	+6.2%	+1.4%
Vol Delta vs. Pre-Crisis Jan Forecast	-3,218,000	-1,813,000	-736,000	-526,000



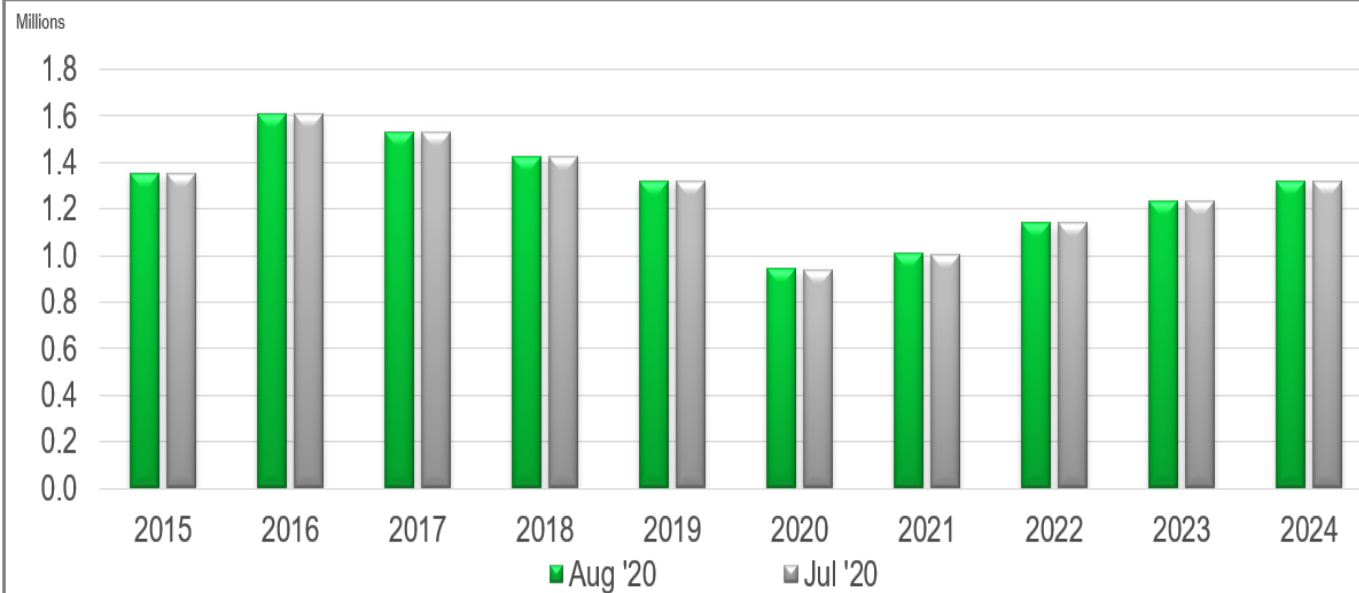
Global Situation – Mexico



RED NACIONAL DE CLUSTERS
DE LA INDUSTRIA AUTOMOTRIZ

Mexico: Not Expected to Avoid Global Recession

Mexico: COVID-19 Impacted Light Vehicle Sales Forecast (August 2020)



	2020	2021	2022	2023
% Growth YoY	-28.7%	+7.4%	+12.7%	+8.4%
Vol Delta vs. Pre-Crisis Jan Forecast	-340,000	-280,000	-182,000	-131,000



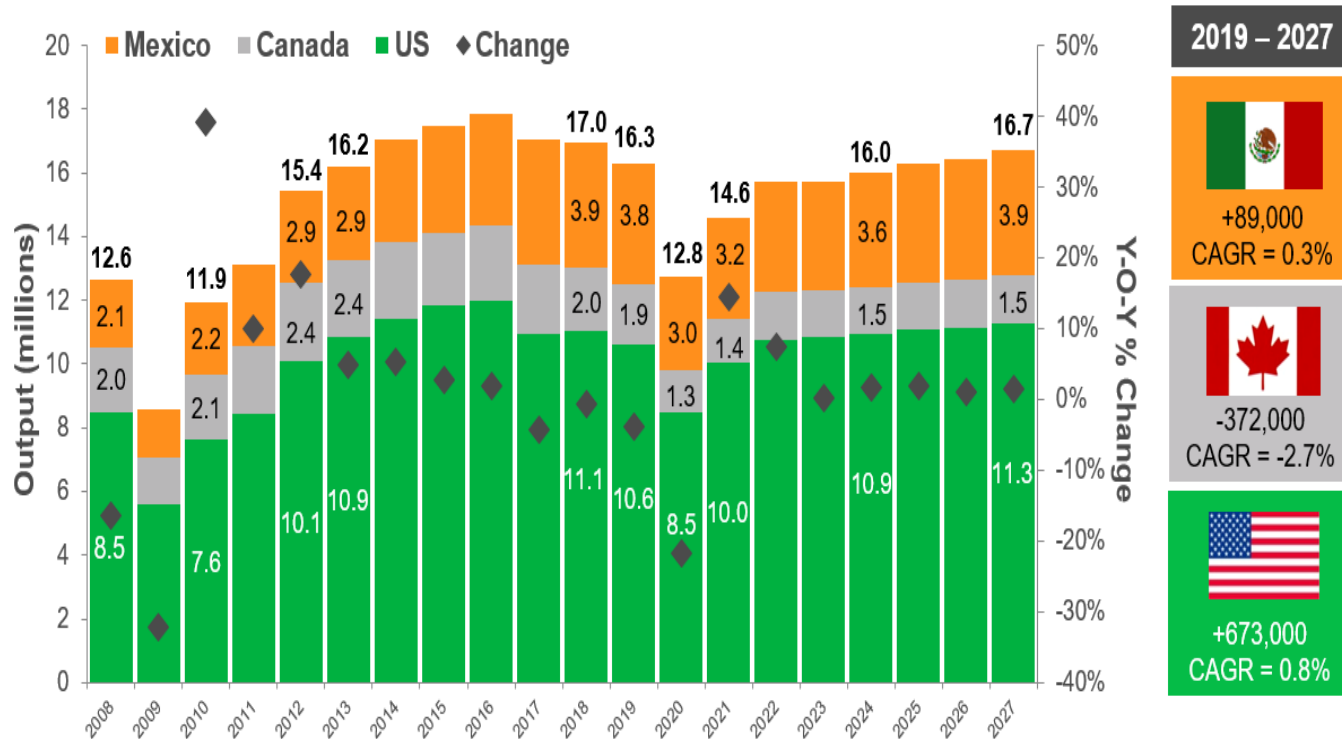
Light Vehicle Production in North America



RED NACIONAL DE CLUSTERS DE LA INDUSTRIA AUTOMOTRIZ

Production Outlook

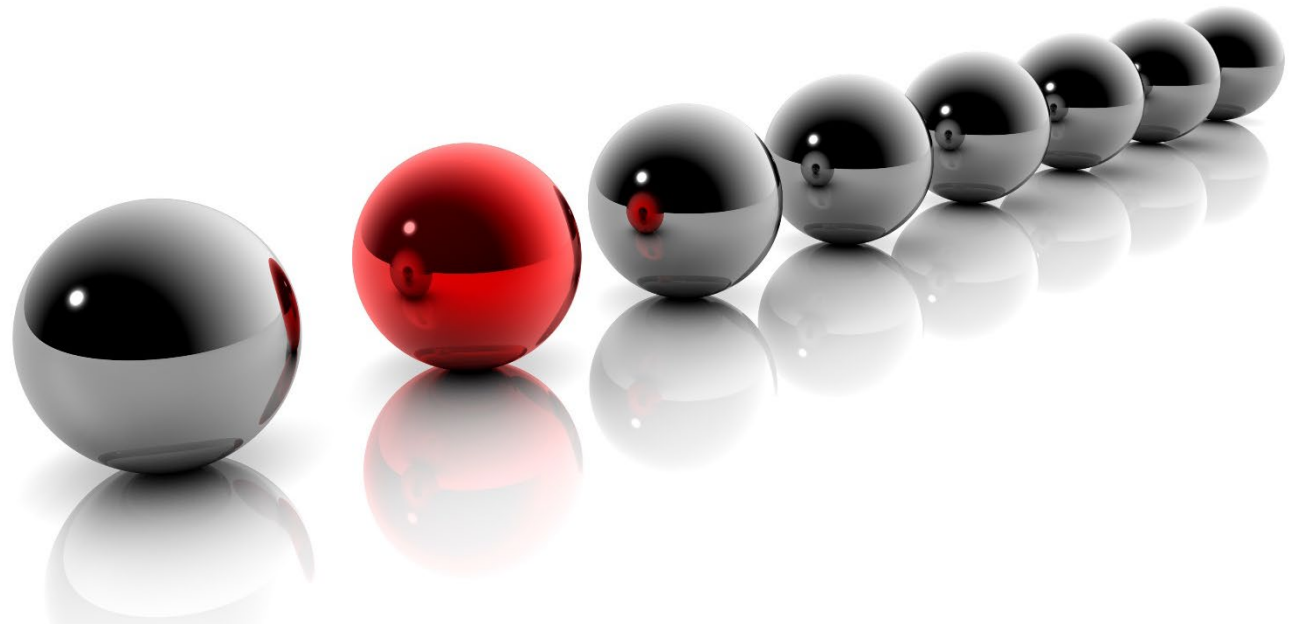
North American Light Vehicle Production by Country



Source: IHS Markit Light Vehicle Production Forecast



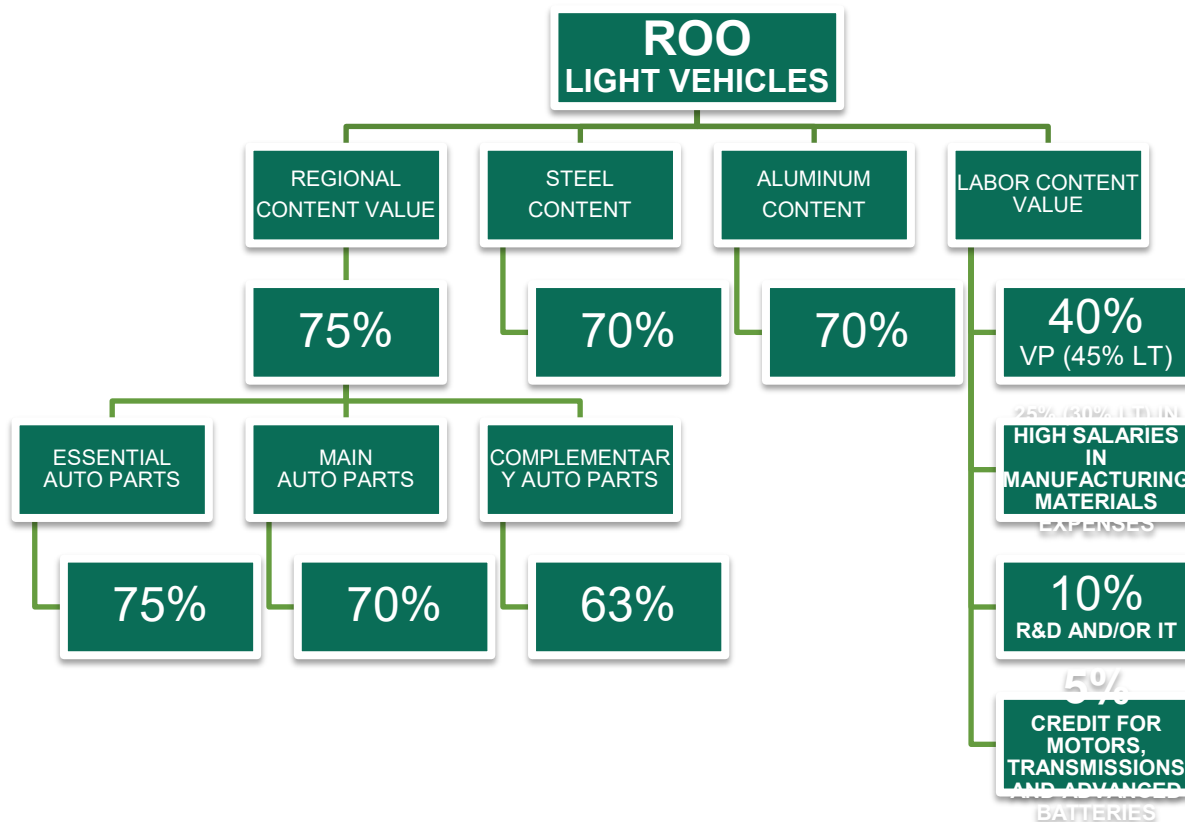
➤ **Then came USMCA**



Compliance with the T-MEC Rules



RED NACIONAL DE CLUSTERS DE LA INDUSTRIA AUTOMOTRIZ

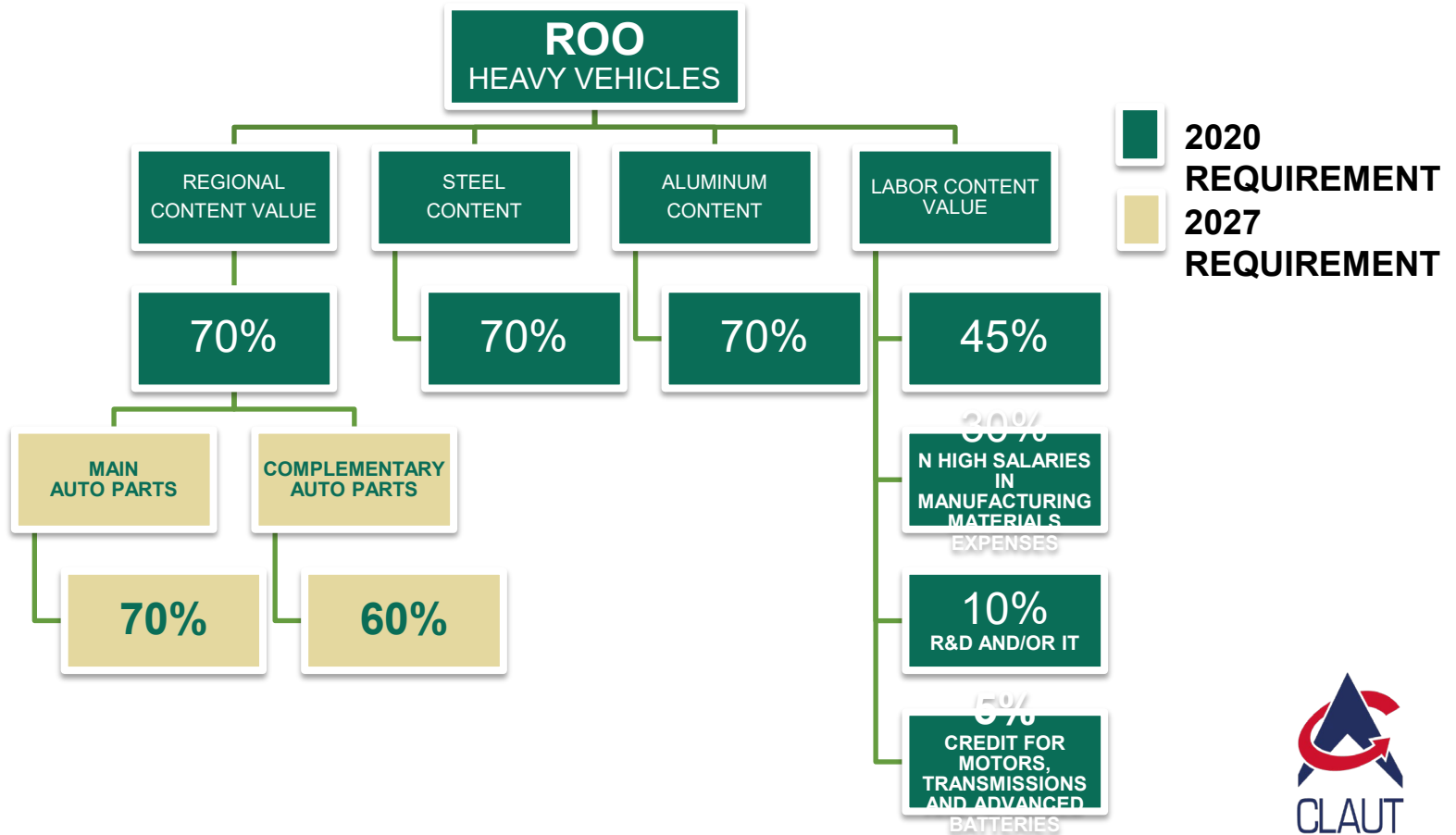


CLAUT
CLUSTER AUTOMOTRIZ DE NUEVO LEÓN A.C.

Compliance with the T-MEC Rules



RED NACIONAL DE CLUSTERS
DE LA INDUSTRIA AUTOMOTRIZ





**COLLABORATING
COMPETING
GROWING**

Cluster - Competitiveness



Taking advantage of collaboration and synergies with other companies



Direct relationship with the Government and Academia

Greater
Competitiveness



107 Members

OEM

CATERPILLAR® **DAIMLER**

INTERNATIONAL
ANAVISTAR COMPANY

JOHN DEERE

Tier 1

ACCURIDE **ARCONIC** **Convent Home** **CLARIOS** **DIE Automotive**

DRAXTION **Polomex** **DBG** **DENSO** **FIBOSA**

FRISA **GONHER** **HYUNDAI MOBIS** **KATCON** **MACIMEX**

MERITOR **Metalsa** **NELSON** **Nemak** **PROLAMSA**

QUIMICO **Rassini** **SISAMEX** **JOYSON** **Ternium**

TUPY **Vitro** **YAZAKI**

Tier 2

ABX **ABT** **ACEROTEK** **acument** **alb** **ALIAN**

AXC **Autycom** **BLACKHAWK** **B2** **DEEMAK** **DOSE** **MECATRONICS** **CATAFERRIS**

CAYBO **CUPRUM** **DIGA** **FROMAX** **EMDA** **EPK** **EVCO** **ESTERNO INDUSTRIAL DE MX** **FADIMA**

FALCO **FISACERO** **HERRAMIENTAS MONTERREY** **HERRAMIENTAS MONTERREY** **HUNTINGTON TOOL** **INDAC** **ISGO**

JONES PLASTE & ENGINEERING **KEY** **KOLD ROLL** **LACERT** **MACHINECARE** **MAK**

MESA **METALINSPEC** **METROLAB** **NAVA** **NEXON** **NGK** **PPD** **PPAK** **PROPRO** **STG MEX** **Standard Register** **STUCKI** **TDM**

trans-matic **Vivalde**

Academy and Government

Academic Institutions (9)

conalep **ICAMI** **ICET** **Tecnológico de Monterrey** **UANI**

UDEM **U-ERRE** **Universidad Regiomontana** **UT**

R&D Centers (4)

CDESI **CIMAT** **COA** **tecnalia**

Government Institutions (3)

Secretaría de Economía y Trabajo **Desarrollo Sustentable** **Instituto de Innovación y Tecnología**

Network of Mexican Automotive Clusters



RED NACIONAL DE CLUSTERS
DE LA INDUSTRIA AUTOMOTRIZ

Members





CLAUT