

Statistical Outlook

Mexico, USA, Canada and other markets.



**Industria Nacional
de Autopartes, A.C.**

Short version

Light Vehicles Jan – Dec 2017

Auto parts Jan – Nov 2017

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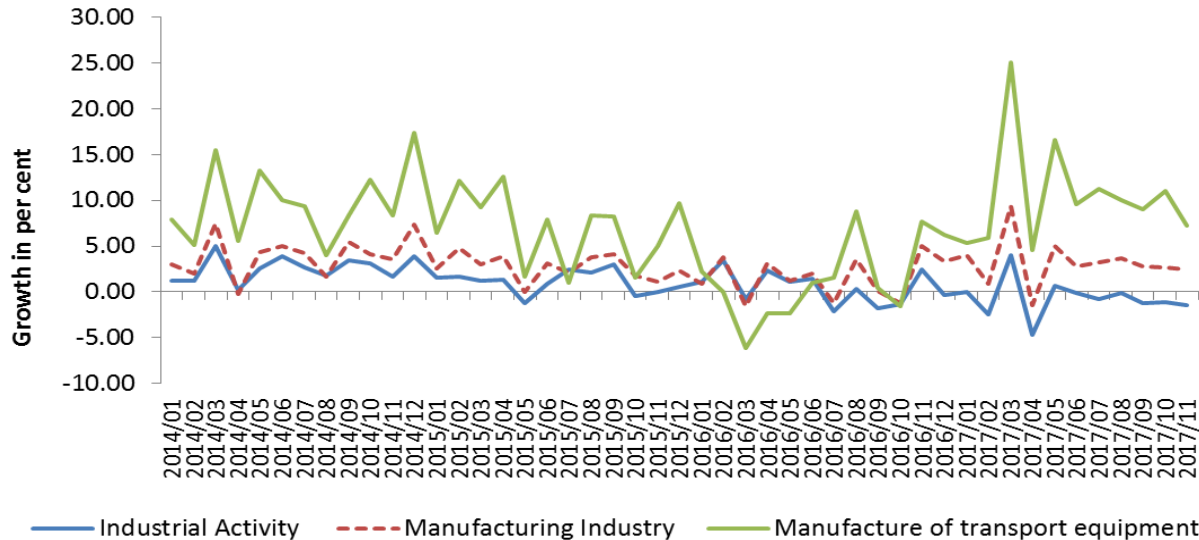
Summary

Mexico

Mexican economic environment	During November of 2017, industrial production in Mexico decreased (-) 1.51 per cent, in regards to the same month of the previous year.
Light vehicles	Between January and December of 2017, production of light vehicles in Mexico reached 3,773,569 units, which represent an increase of 8.89 per cent in comparison of the same period of last year.
Light vehicles for exports	Between January and December of 2017, production of light vehicles for exports in Mexico reached 3,102,604 units, which represents an increase of 12.08 per cent in regards of the same period of last year.
Heavy vehicles	Between January and November of 2017, production of heavy vehicles in Mexico reached 141,472 units, which represent an increase of 1.47 per cent in comparison of the same period of last year.
Heavy vehicles for exports	Between January and November of 2017, production of heavy vehicles for exports in Mexico reached 105,516 units, which represents an increase of 7.02 per cent in regards of the same period of last year.
Auto parts	Between January and November of 2017, production of auto parts in Mexico reached 81,140 million dollars which represents an increase of 11.06 per cent in regards of the same period of last year.

1 - Mexican economic environment

Industrial Production in Mexico, 2014 – Nov 2017 (annual average rate of growth)



Concept	Var – Nov % 2016 vs 2017
Industrial Activity	(-) 1.51 %
Manufacturing Industry	2.41 %
Manufacture of transport equipment	7.23 %

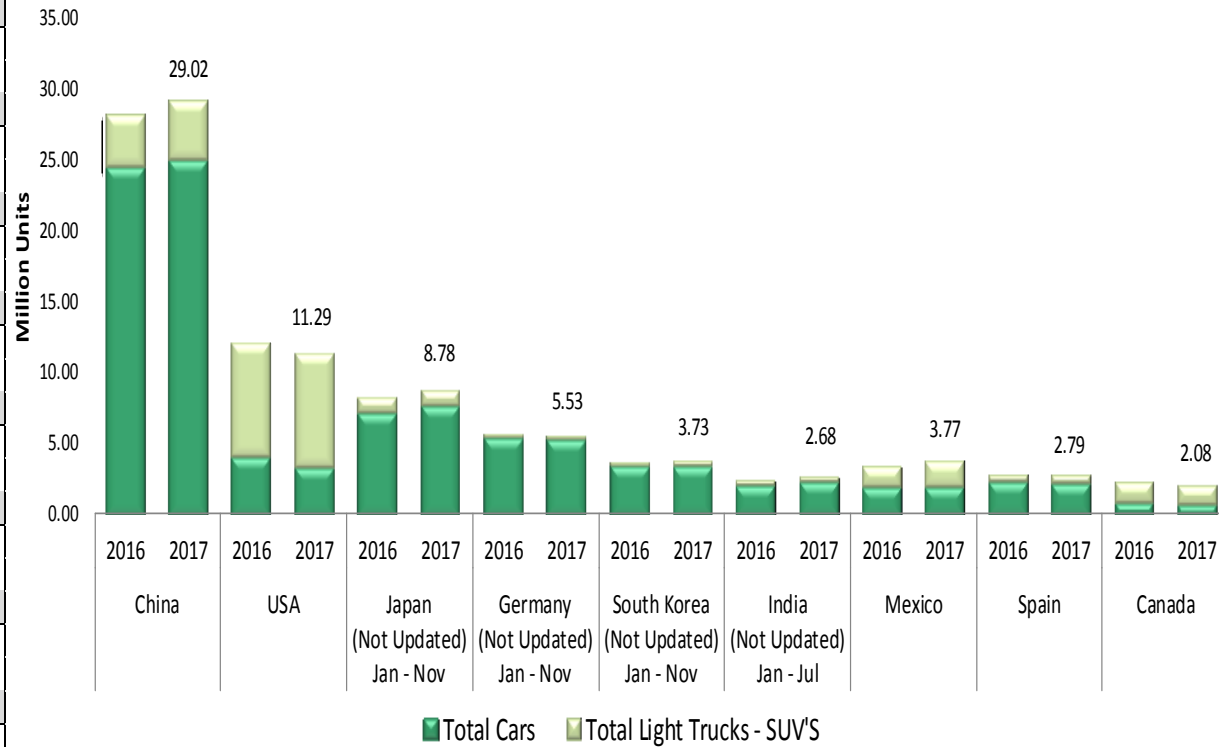
Source: INEGI



	(Million Units)		Var %
	2016	2017	
Total Cars	24.31	24.81	2.02%
Total Light Trucks - SUV'S	3.69	4.21	13.96%
Total Production	28.01	29.02	3.60%
Total Cars	4.01	3.29	-18.02%
Total Light Trucks - SUV'S	8.09	8.00	-1.12%
Total Production	12.10	11.29	-6.72%
Total Cars	7.19	7.66	6.48%
Total Light Trucks - SUV'S	1.11	1.12	0.91%
Total Production	8.30	8.78	5.74%
Total Cars	5.38	5.28	-1.81%
Total Light Trucks - SUV'S	0.29	0.25	-13.55%
Total Production	5.67	5.53	-2.41%
Total Cars	3.47	3.47	0.22%
Total Light Trucks - SUV'S	0.23	0.26	10.24%
Total Production	3.70	3.73	0.85%
Total Cars	2.02	2.28	13.05%
Total Light Trucks - SUV'S	0.42	0.40	-3.89%
Total Production	2.43	2.68	10.16%
Total Cars	2.00	1.91	-4.45%
Total Light Trucks - SUV'S	1.47	1.87	27.00%
Total Production	3.47	3.77	8.89%
Total Cars	2.31	2.24	-3.03%
Total Light Trucks - SUV'S	0.51	0.54	5.84%
Total Production	2.83	2.79	-1.42%
Total Cars	0.77	0.68	-11.23%
Total Light Trucks - SUV'S	1.56	1.40	-10.14%
Total Production	2.33	2.08	-10.50%

2 - Production of light vehicles

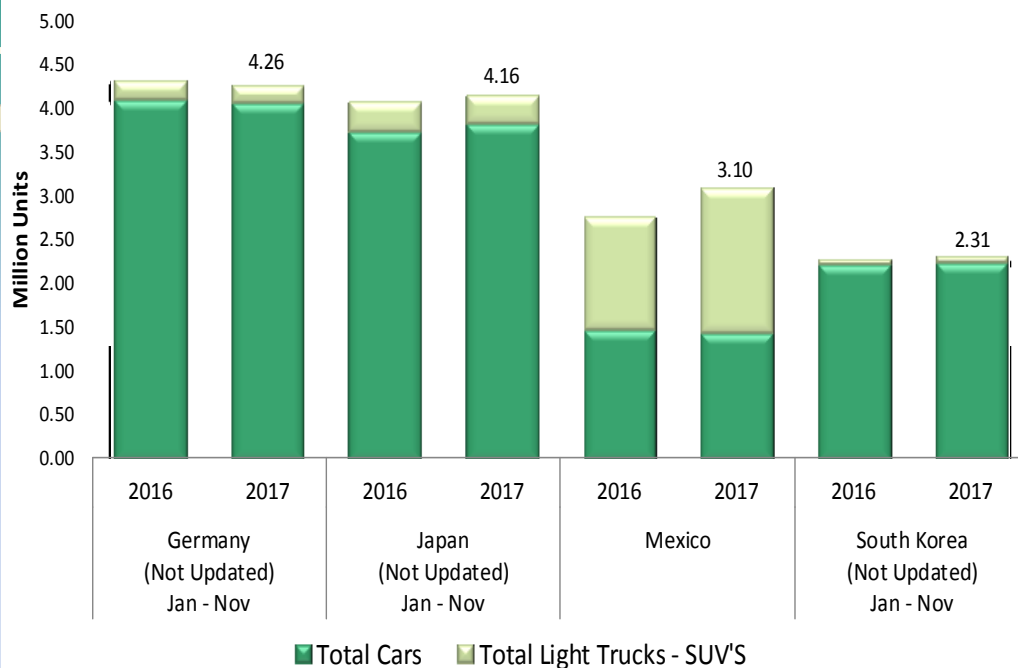
Jan – Dec 2016 vs 2017



Source: CAAM, JAMA, VDA, KAMA, SIAM, AMIA, ANFAC, Automotive News Data Center

3 - Production of light vehicles for exports

Jan – Dec 2016 vs 2017



	(Million Units)		Var %
	2016	2017	
Total Cars	4.11	4.07	-0.95%
Total Light Trucks - SUV'S	0.22	0.19	-12.47%
Total Export	4.33	4.26	-1.54%
Total Cars	3.74	3.82	2.36%
Total Light Trucks - SUV'S	0.35	0.34	-4.21%
Total Export	4.09	4.16	1.79%
Total Cars	1.48	1.44	-2.35%
Total Light Trucks - SUV'S	1.29	1.66	28.62%
Total Export	2.77	3.10	12.08%
Total Cars	2.22	2.24	0.97%
Total Light Trucks - SUV'S	0.06	0.07	10.77%
Total Export	2.29	2.31	1.24%

Source: VDA, JAMA, KAMA, AMIA

4 - Production of heavy vehicles in Mexico Jan - Nov 2016 vs 2017



Source: INEGI

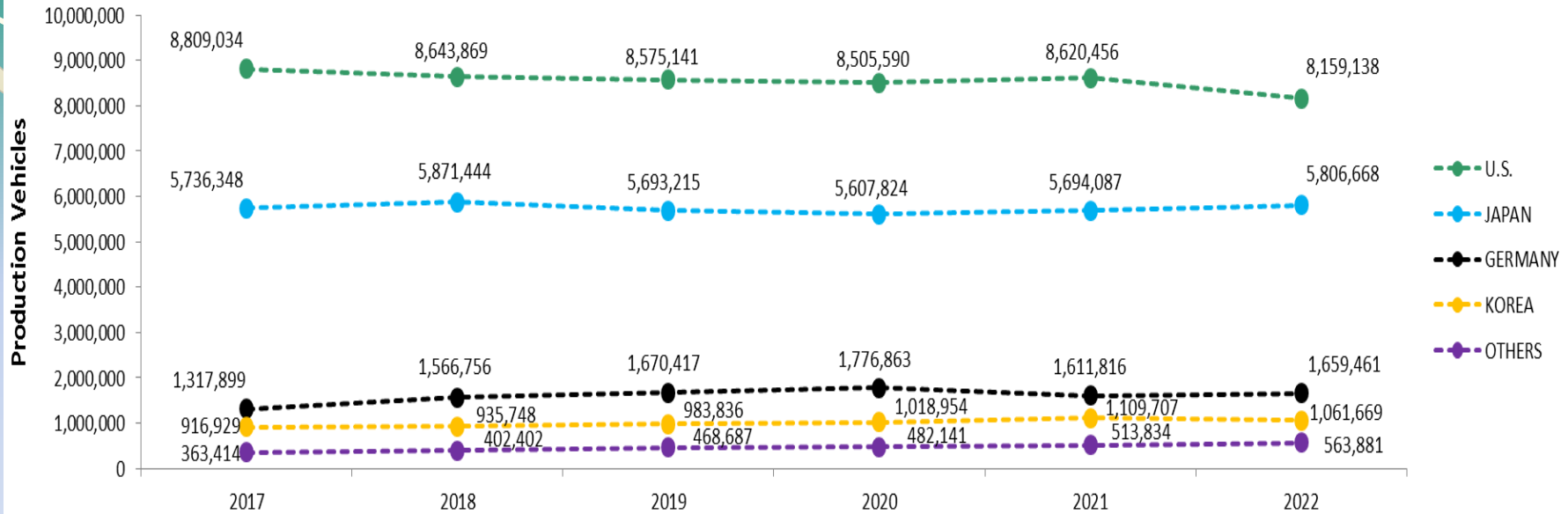
5 - Production of heavy vehicles for exports in Mexico Jan – Nov 2016 vs 2017



(Thousand Units)	2010	2011	2012	2013	2014	2015	2016	2016 Jan - Nov	2017 Jan - Nov	Var %
Total Export	62.65	105.39	104.16	97.50	124.02	156.89	106.16	98.60	105.52	7.02%

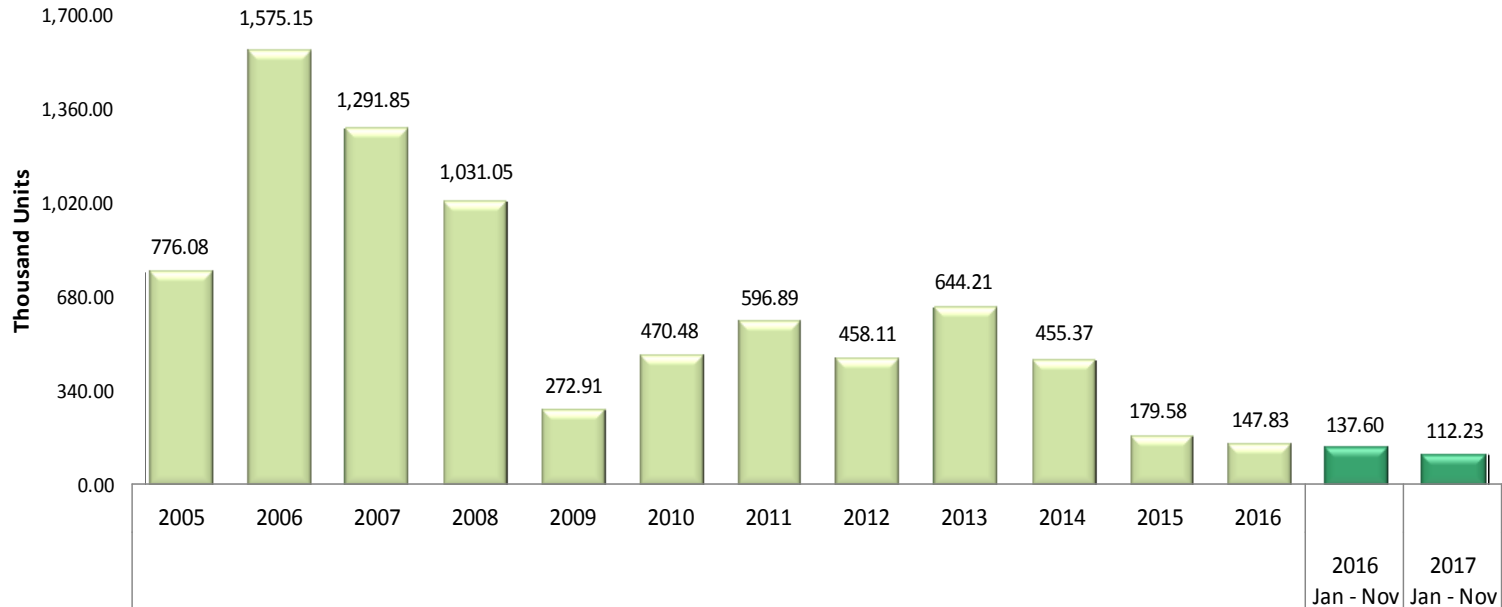
Source: INEGI

6 - Forecast of light vehicles production in NAFTA, 2017 - 2022



Source: IHS Markit (January, 2018)








7 - Imports of used vehicles in Mexico Jan – Nov 2016 vs 2017

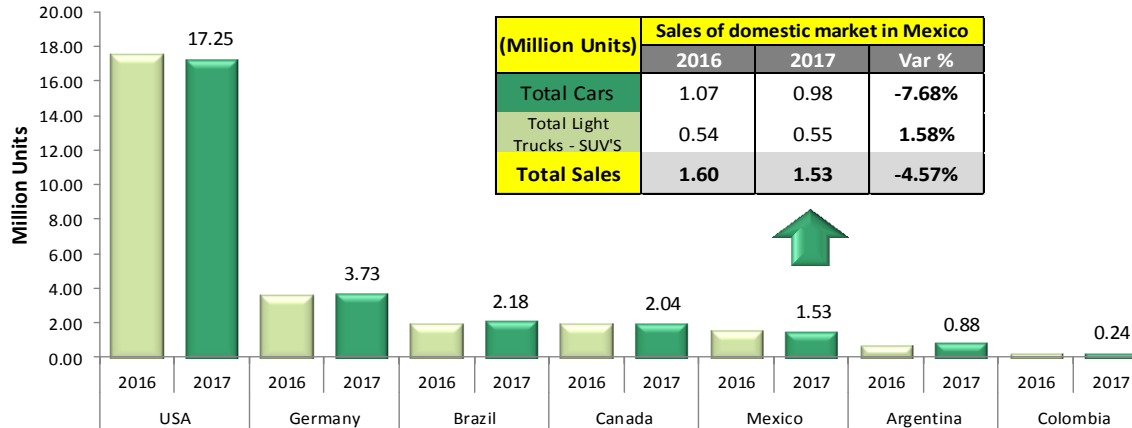


(Thousand Units)	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2016 Jan - Nov	2017 Jan - Nov	Var %
Imports of used vehicles	776.08	1,575.15	1,291.85	1,031.05	272.91	470.48	596.89	458.11	644.21	455.37	179.58	147.83	137.60	112.23	-18.44%

Source: INA with information from AMDA and AMIA

8 - Sales of domestic market of light vehicles at our main exports markets Jan – Dec 2016 vs 2017

(Million Units)												
	2016	2017	Var %	2016	2017	Var %	2016	2017	Var %	2016	2017	Var %
	17.55	17.25	-1.75%	3.63	3.73	2.78%	1.99	2.18	9.42%	1.60	1.53	-4.57%
										(Referance)		
	2016	2017	Var %	2016	2017	Var %	2016	2017	Var %	1.60	1.53	-4.57%
	1.95	2.04	4.63%	0.72	0.88	22.51%	0.25	0.24	-6.09%			



Source: VDIK, ANFAVEA, AMIA, ADEFA, ANDEMOS, Automotive News Data Center

9 - Top selling vehicles of domestic market per Brand in Mexico Jan – Dec 2017

Rank	Brand	Units Jan - Dec
1	Renault - Nissan	396,743
2	General Motors	258,523
3	Volkswagen	233,942
4	Hyundai - Kia	133,247
5	Toyota	105,464
6	FCA	100,846
7	Honda	90,362
8	Ford	83,275
9	Mazda	54,163
10	BMW	21,615

Source: AMDA

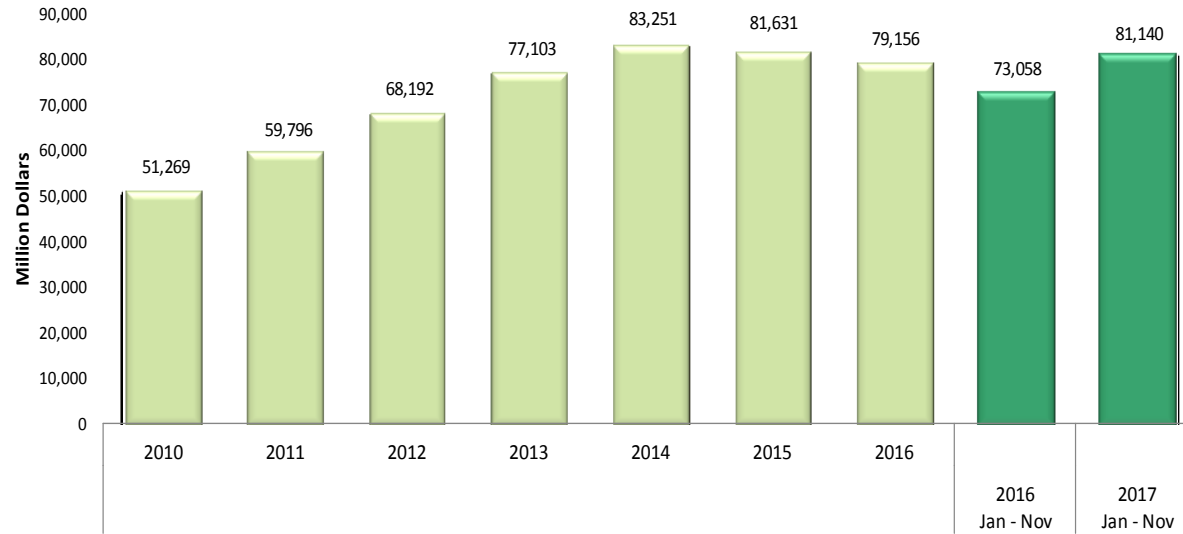
10 - Top selling vehicles of domestic market by Model in Mexico Jan – Dec 2017

Rank	Model	Units Jan - Dec
1	Nissan Versa	93,041
2	Nissan NP 300	75,324
3	Chevrolet Aveo	65,772
4	Volkswagen Vento	63,402
5	Nissan March	54,063
6	Volkswagen Jetta	45,246
7	Nissan Sentra	42,746
8	Chevrolet Spark	32,795
9	Honda CR-V	27,761
10	Honda X-Trail	25,645

Source: AMDA

11 - Production of auto parts in Mexico

Jan - Nov 2016 vs 2017



(Million Dollars)	2010	2011	2012	2013	2014	2015	2016	2016 Jan - Nov	2017 Jan - Nov	Var %
Total Production	51,269	59,796	68,192	77,103	83,251	81,631	79,156	73,058	81,140	11.06%

Source: System information: Monthly Survey of Manufacturing Industry (EMIM) INEGI