

Mexico's Auto Parts Industry Shows Recovery at the Close of 2025 and Consolidates Its Strategic Role in North America: INA

- National auto parts production totaled USD 110.038 billion from January to November 2025, reflecting a year-over-year variation of -2.86%.
- In November 2025, production reached USD 9.877 billion, with +3.24% year-over-year growth, signaling a recovery toward year-end.
- Five auto parts segments accounted for 53% of national production, highlighting a highly specialized industry.

Mexico City, February 10, 2026. – The National Auto Parts Industry (INA) reported that Mexico's auto parts sector showed clear signs of resilience and recovery at the close of 2025, recording year-over-year growth of 3.24% in November, reaching production of USD 9.877 billion.

From January to November 2025, national auto parts production reached USD 110.038 billion, representing a 2.86% contraction compared to the same period of the previous year. This trend aligns with the slowdown observed in the U.S. automotive market—the primary destination for Mexican auto parts—which recorded cumulative production of 9,366,461 vehicles during the same period, a -1.67% variation compared to 2024.

Meanwhile, total U.S. auto parts imports amounted to USD 172.886 billion, a decrease of -3.10%, while imports originating from Mexico totaled USD 75.851 billion, reflecting a -1.85% annual variation. These figures confirm that Mexico remains the leading supplier of auto parts to the U.S. market, accounting for 43.87% of total imports during the January–November 2025 period.

Despite the challenging environment, Mexico consolidated its leadership as the main auto parts supplier to the United States, with shipments totaling USD 75.851 billion. In terms of foreign trade, Mexican auto parts exports reached USD 95.725 billion, while imports totaled USD 62.831 billion, resulting in a favorable trade balance of USD 32.893 billion.

The sector's production structure remained highly specialized. Electrical parts led production with a 19.3% share (USD 21.221 billion), followed by transmissions and clutches (9.8%, USD 10.821 billion), textiles, carpets and seats (9.1%, USD 9.982 billion), engine parts (8.0%, USD 8.821 billion), and suspension and steering components (6.7%, USD 7.367 billion). Together, these five segments represented 53% of total national production.

Regionally, the Northern region accounted for 44.0% of national production (USD 48.227 billion), followed by the Bajío region with 35.9% (USD 39.429 billion) and the Central region with 15.1% (USD 16.541 billion). At the state level, the leading producers were Coahuila (USD 16.740 billion), Guanajuato (USD 15.007 billion), Nuevo León (USD 14.366 billion), Chihuahua (USD 9.609 billion), and Querétaro (USD 8.610 billion). Collectively, the top ten states represented 86.9% of national production, reflecting a highly integrated and specialized value chain.

INA stated that the performance observed during the second half of 2025 confirms the adaptability and resilience of Mexico's auto parts sector, reaffirming its role as a strategic pillar of North America's automotive value chain.