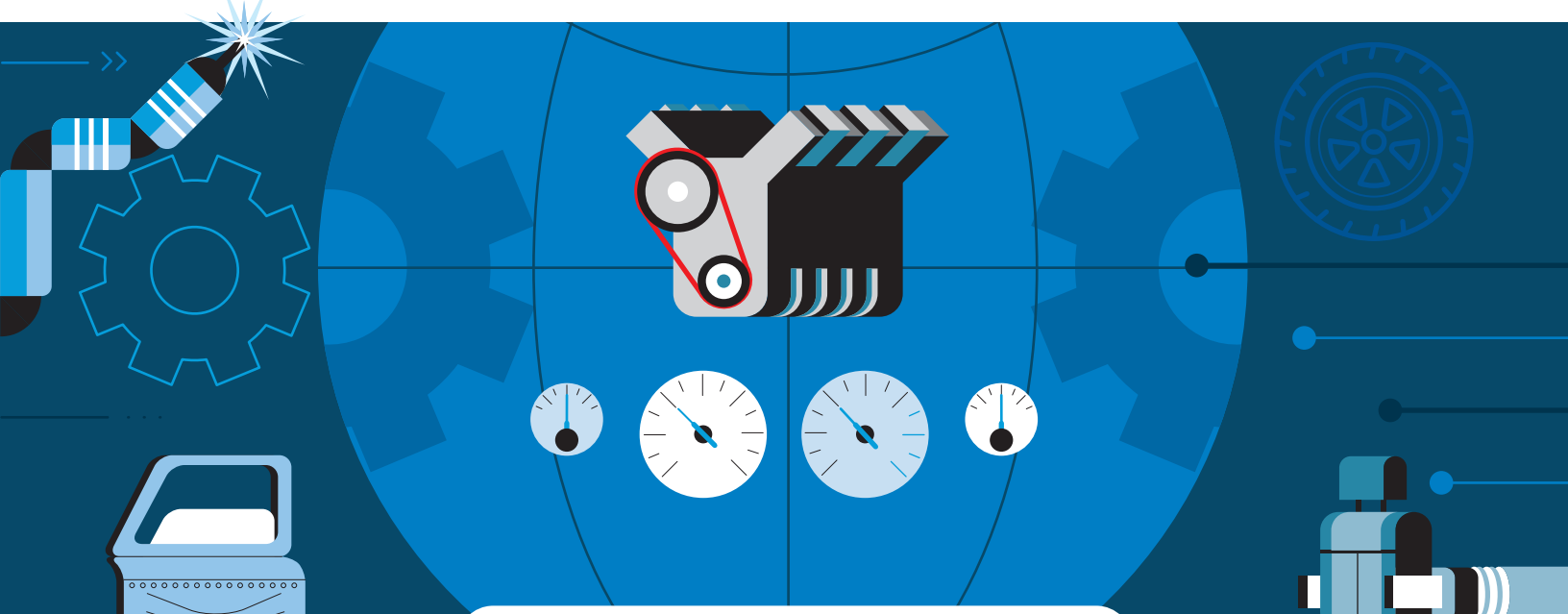
THE OTHER SIDE OF THE COIN

CHAPTER 4
STRENGTHENING VALUE CHAINS IN THE MEXICAN AUTOMOTIVE INDUSTRY

SUPPLIER DEVELOPMENT PROGRAM PLAN MEXICO-IFC-INA



Plan México

IFC International Finance Corporation WORLD BANK GROUP

INA Industria Nacional de Autopartes, A.C.

KEY IDEAS

Plan México

IFC International Finance Corporation WORLD BANK GROUP

INA Industria Nacional de Autopartes, A.C.

I

THE RECONFIGURATION OF THE AUTOMOTIVE INDUSTRY: INTEGRATION AND STRENGTHENING OF LOCAL SUPPLIERS

1

THE MEXICAN AUTOMOTIVE INDUSTRY FACING THE CHALLENGES OF THE NEW INTERNATIONAL CONTEXT

The automotive industry is a key driver of the Mexican economy and a strategic pillar of North American international trade. Mexico ranks as the world's fourth-largest producer of automotive components and the leading supplier to the United States, with more than 1,400 companies in the automotive sector— or 1,800 when including all companies active in the sector— generating approximately 850,000 jobs in the auto parts industry. The sector accounts for 43% of U.S. auto parts imports and attracts 35% of manufacturing FDI in Mexico, underscoring its strategic role in regional competitiveness.

LARGEST PRODUCER OF AUTO PARTS WORLDWIDE

LEADING SUPPLIER OF AUTO PARTS TO THE UNITED STATES (43% OF ITS IMPORTS)

+2,000 COMPANIES

+850,000 JOBS IN THE AUTO PARTS INDUSTRY

$3.50 USD OUT OF EVERY $10 USD IN MANUFACTURING FDI

However, the current international context presents new challenges. Technological transition, trade tensions, and new production integration models require strengthening local supply chains and reducing dependence on external inputs.

Source: INA, based on information from ITC and INEGI, 2025.

2

SAME MARKET, MORE PLAYERS

According to PwC data, in 2024 the global automotive industry entered a period of reconfiguration and intensifying competition. The market maintains its global scale, while new original equipment manufacturers (OEMs) are gaining prominence and seek to position themselves among the industry leaders, driving more competition and accelerating innovation. This environment marks a key transition, in which the industry evolves toward more efficient, technologically advanced, and differentiation-oriented models, creating opportunities for companies that invest in adaptation and strategic capabilities.

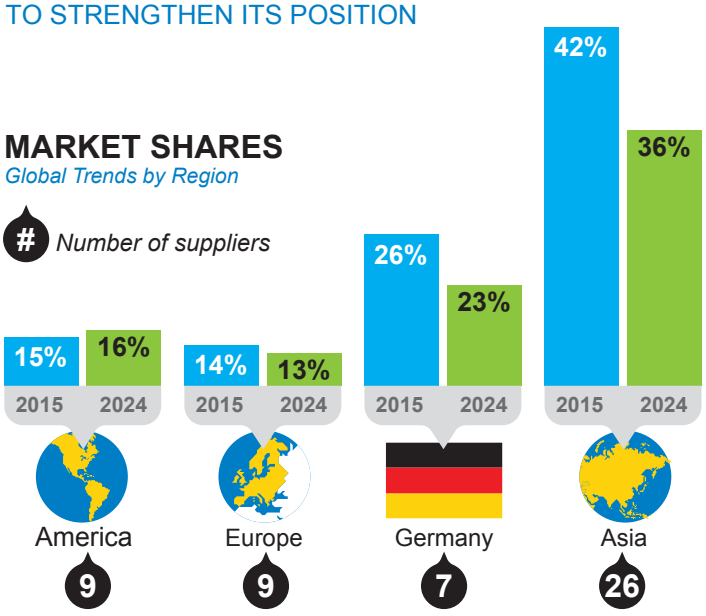
IN SHORT, COMPETITORS ARE GROWING, WHILE ESTABLISHED MANUFACTURERS ARE ADJUSTING THEIR MARKET SHARE.

This evolution is contributing to a decrease in the competitiveness of manufacturers and suppliers in other regions of the world. Trends in global market share in 2015 and 2024 reflect this: a decrease in Europe (-1%), Germany—the leading supplier of auto parts—(-3%), and Asia (-6%).

ON THE OTHER HAND, AMERICA CONTINUES TO STRENGTHEN ITS POSITION

MARKET SHARES

Global Trends by Region



Source: INA, with information from PwC, 2025

3
DEVELOPING A STRONG SUPPLY CHAIN

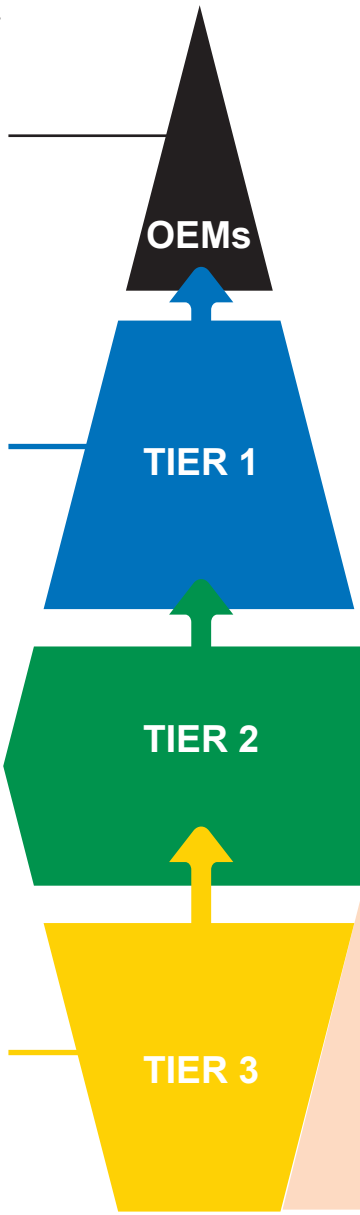
In the automotive industry, the relationship between OEMs and Tier 1, Tier 2, and Tier 3 suppliers forms an integrated and strategic supply chain.

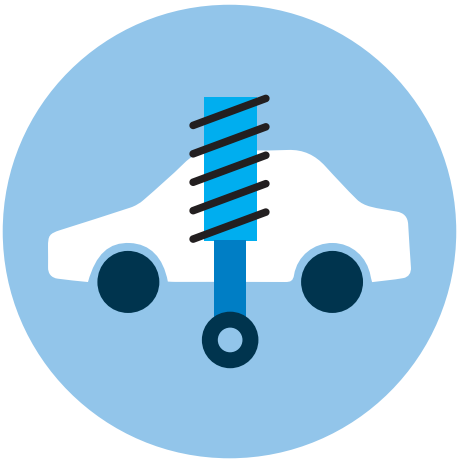
They occupy the top tier of the production structure. They assemble the final vehicle and define technical specifications and quality standards that guide the rest of the supply chain.

Companies with high technological capacity that supply complete systems and advanced modules directly to OEMs, such as engines, transmissions or electronic components.

They supply Tier 1 companies with subassemblies and specialized parts, ensuring operational continuity and access to critical components.

They form the base of the pyramid and are responsible for supplying for supplying raw materials, basic parts, and essential services to Tier 2 companies.



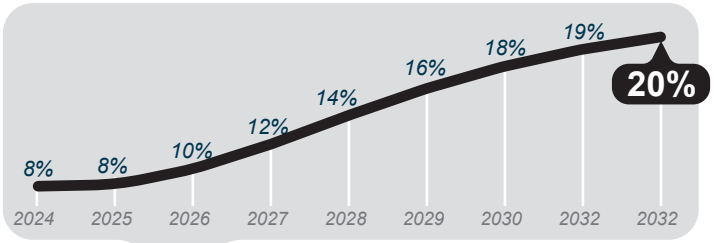


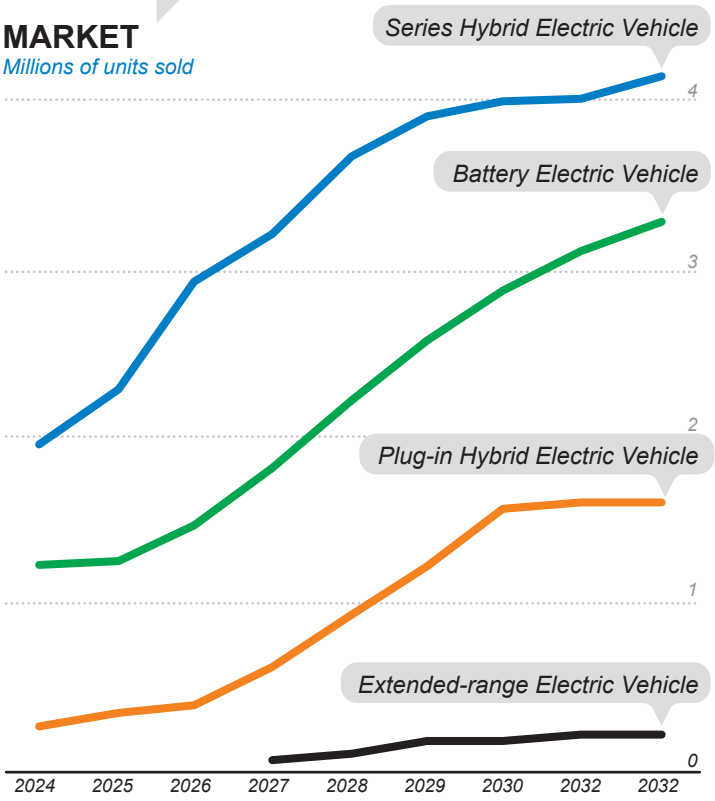
THE TIERED STRUCTURE ENSURES EFFICIENCY, CLEAR ALLOCATION OF RESPONSIBILITIES, AND COORDINATION TO MEET GLOBAL STANDARDS. BUT IF ONE PART FAILS, THE ENTIRE CHAIN IS AFFECTED.

IN THE NEW CONTEXT OF THE AUTOMOTIVE INDUSTRY, THE MID- AND LOWER-TIER LEVELS OF THE SUPPLY CHAIN—TIER 2 AND TIER 3 SUPPLIERS—HAVE BEEN PARTICULARLY VULNERABLE, AS THEY OFTEN LACK THE CAPACITY AND FINANCIAL RESOURCES REQUIRED TO INNOVATE AND SCALE, ESSENTIAL CONDITIONS IN A HIGHLY COMPETITIVE ENVIRONMENT. THEREFORE, IN NORTH AMERICA, PRIORITY HAS BEEN GIVEN TO THE LOCAL PRODUCTION OF COMPONENTS, REDUCING DEPENDENCE ON SUPPLIERS OUTSIDE THE REGION.

4
LOCAL INNOVATION, GLOBAL COMPETITIVENESS

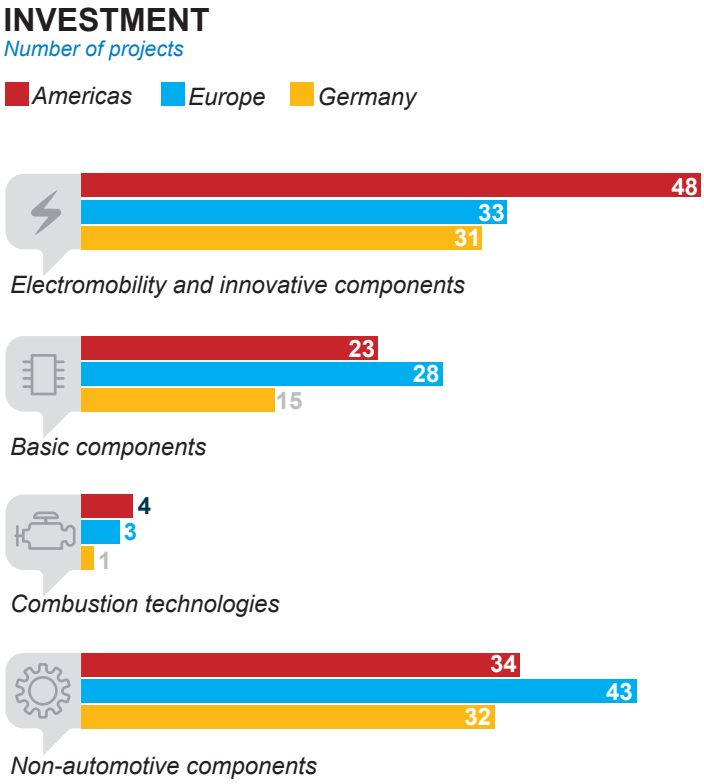
Furthermore, this innovation cycle is also driving growth in a strategic sector: electromobility. Trends indicate that the EV market in North America will experience sustained growth over the next eight years, with a projected growth of 20% by 2032, driven primarily by sales of hybrid electric vehicles (SHEVs) and battery electric vehicles (BEVs).





Source: INA, with information from MEMA and AutoForecast Solutions, 2025

In this context, during the period 2018-2025, INVESTMENT PROJECTS IN THE AMERICAS HAVE CONCENTRATED ON ELECTROMOBILITY AND INNOVATIVE COMPONENTS —SURPASSING EUROPE AND GERMANY—, followed by non-automotive components, basic components, and finally, combustion technologies.



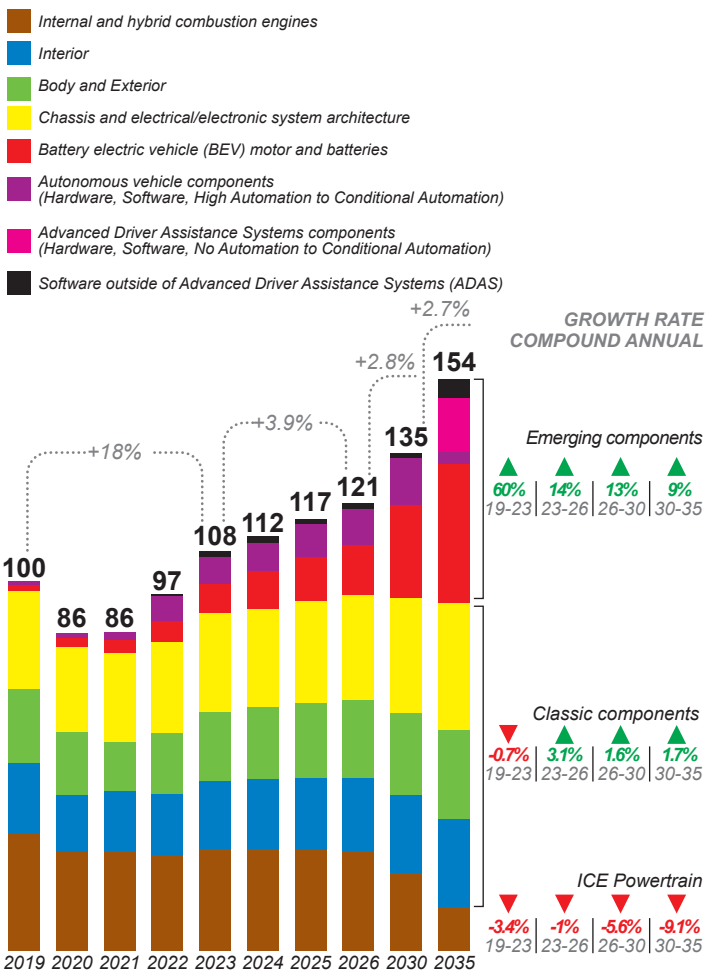
The transition to the production of high value-added components linked to electromobility —software, batteries, and electronic architecture— is defining the competitiveness of those participating in the industry. In this context, the Mexican automotive sector is prioritizing vertical integration and capability development—across all levels of the supply chain—over horizontal growth—focusing on only one level of the chain—positioning itself as a key player.

Source: INA, with information from PwC, 2025

Data from Boston Consulting Group (BCG) highlights that the most in-demand components by 2035 will be those linked to electrification, software, and autonomous vehicles. Similarly, semiconductors, batteries, and components related to electrification already offer greater profitability compared to traditional components such as interiors, chassis, or powertrains.

VALUE POOLS

Global demand for automotive components will be stable through 2035, but shift towards electrified, software-defined and automated vehicles will create higher-growth segments

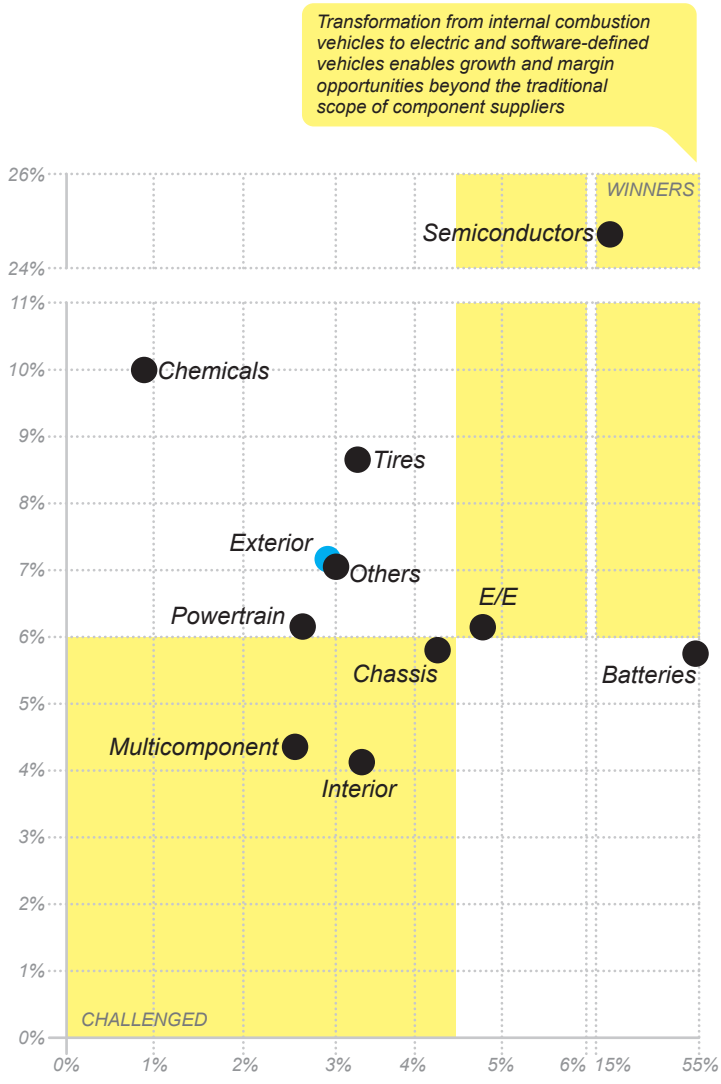


Revenue x EBIT

On average diversified suppliers posted relatively lower performance, especially compared to semiconductor and battery business

Average EBIT margin and compound annual growth rate (CAGR) of revenue for 754 global suppliers by subsector

Compound annual growth (CAGR) of revenue, 2018-2023



Source: INA, with information from Boston Consulting Group

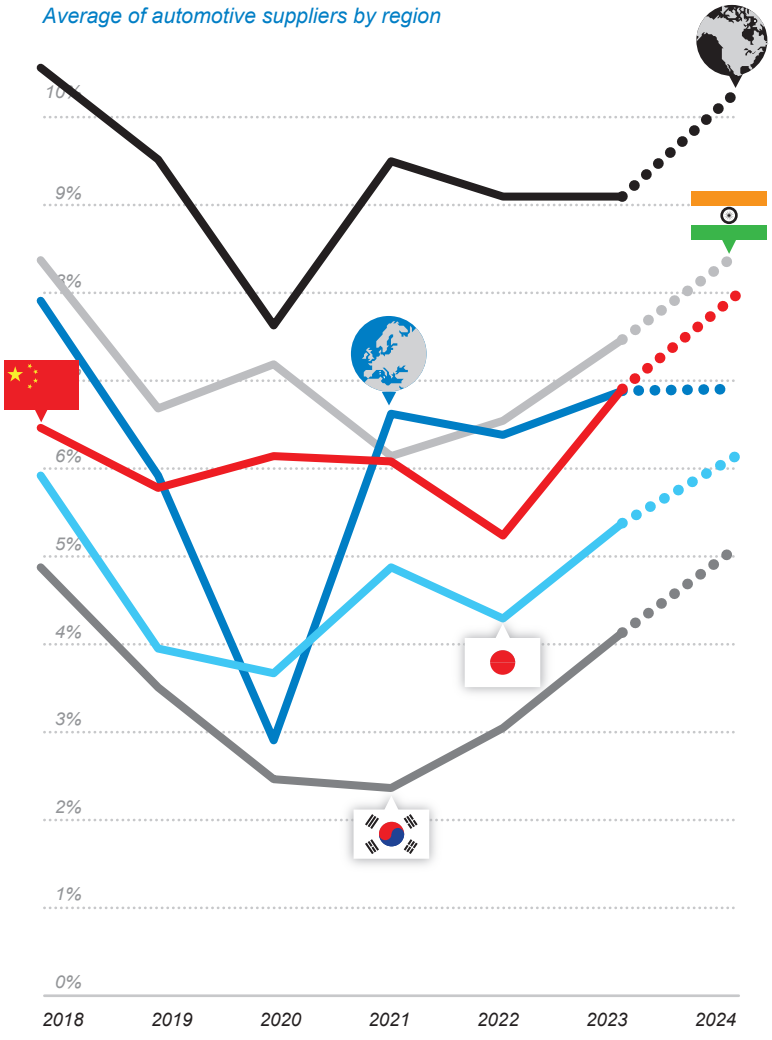
5
ALLIANCES AS AN ENGINE OF COMPETITIVENESS

North American suppliers have led global profit margins since 2018. Meanwhile, China, as an emerging player, has recorded profit margins of between 5% and 6%, surpassing Europe in 2023 and ranking only behind India and North America in 2024.

IN THE LONG TERM, NORTH AMERICAN SUPPLIERS ARE EXPECTED TO BECOME GLOBAL LEADERS IN SUPPLY CHAIN CAPABILITIES

EBIT MARGIN

Average of automotive suppliers by region

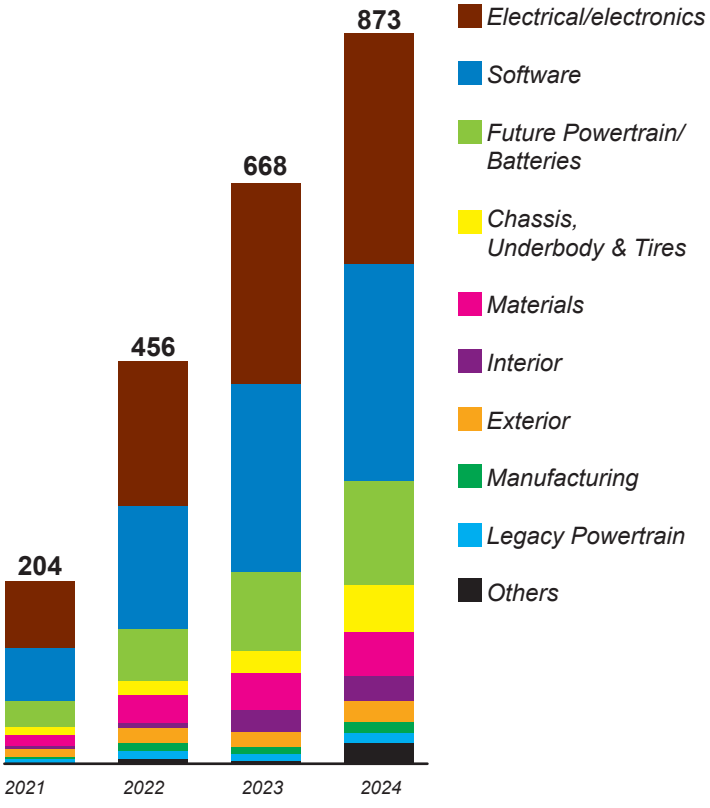


NORTH AMERICA'S STRENGTH IN SUPPLY CHAINS IS BASED ON ITS STRATEGIC ALLIANCES TO ACCELERATE THE ADOPTION, DEVELOPMENT, AND PRODUCTION OF NEW COMPONENTS.

According to data from BCG Partnership Tracker, suppliers have focused primarily on signing agreements that guarantee access to electronic components and advanced software. Under this premise, the alliances that the United States, Mexico, and Canada build as a region will be crucial for increasing competitiveness in new technologies and electromobility.

Partnerships

Suppliers are making alliances to ensure access to technologies, mainly in electrical/electronic components and software



Source: INA, with information from Boston Consulting Group.

6

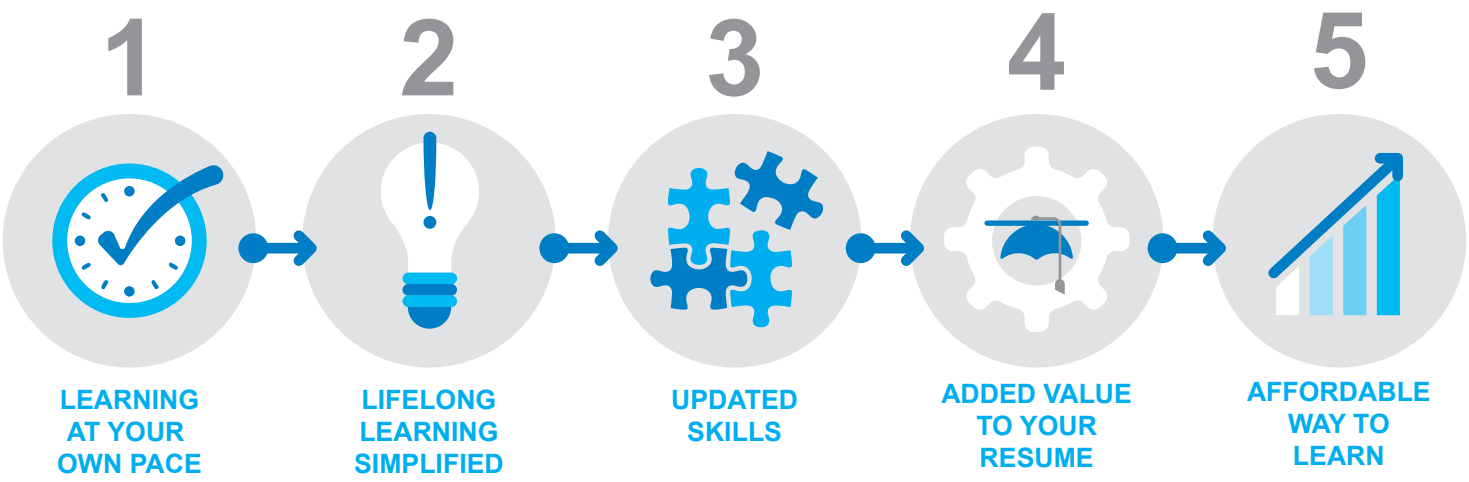
INA AND ITS COMMITMENT TO STRENGTHENING LOCAL SUPPLIERS

In line with its commitment to strengthening local suppliers, the National Auto Parts Industry Association (INA), in collaboration with the National Center for Higher Education Evaluation (CENEVAL), has introduced a micro-credential model: short, flexible training courses focused on developing key technical and digital skills for the automotive industry.

These micro-credentials recognize highly valued skills that are not always acquired through formal, long-term degrees, and respond to the growing need for continuous learning demanded by today's labor market in the face of technological advancements and the productive transformation of the sector. In this context, investment in these types of programs directly impacts organizational productivity and the employability of talent.

MICRO-CREDENTIALS

The evolution of professional learning in a digital world

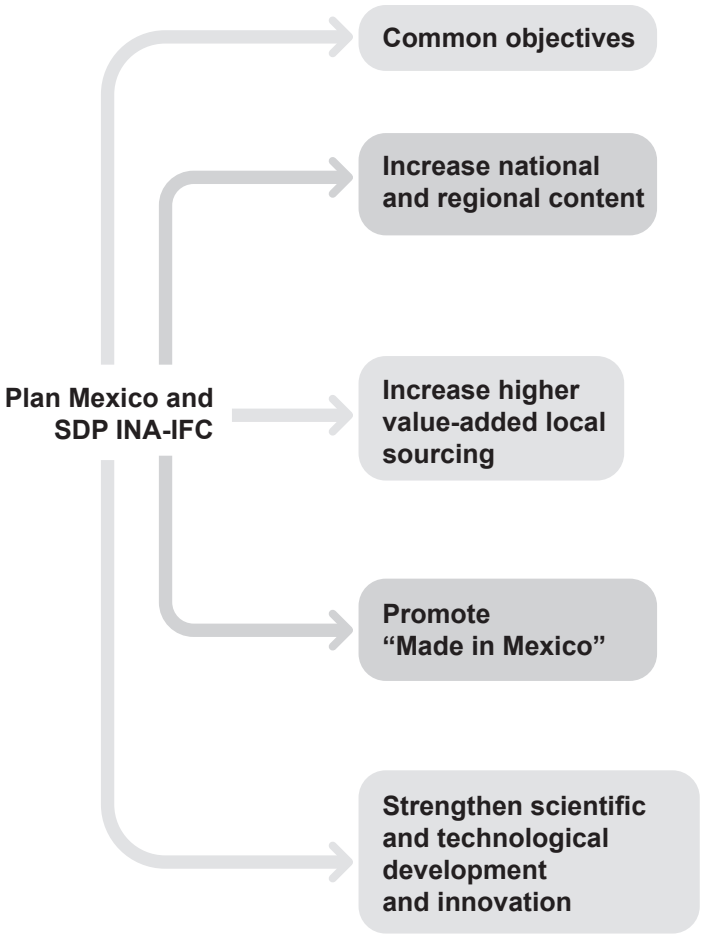


Micro-credentials have their origin in the evolution of shorter and more flexible learning practices that already existed in continuing vocational training, but which were reinforced thanks to digitalization, the need to certify specific skills, and the labor market's need for more adaptable profiles. Digital sectors such as information technology boosted their development, while the COVID-19 pandemic accelerated their adoption as a rapid reskilling tool.

Under the name Campus INA, the platform integrates specialized content in electromobility, advanced manufacturing, industrial safety, and technical leadership, aligned with the real needs of the automotive value chain. This model supports employees in transitioning toward self-directed and lifelong learning, essential for suppliers seeking to increase their added value.

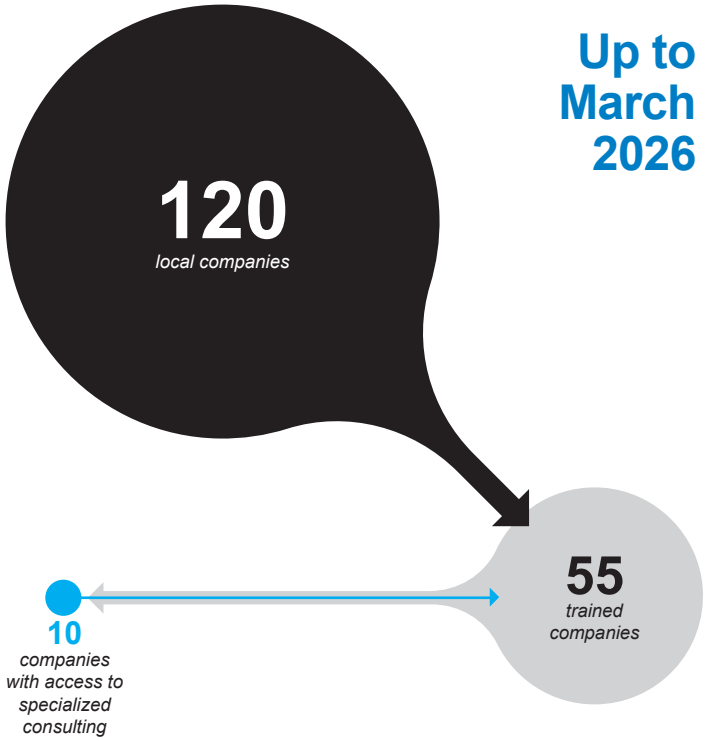
At the same time, INA and the International Finance Corporation (IFC) of the World Bank Group have launched the Supplier Development Program (SDP), a demand-driven model designed to integrate Mexican SMEs —mainly Tier 2 and Tier 3 suppliers— into the supply chain of large companies in the sector.

The SDP, whose implementation has delivered significant results in countries such as Turkey and Vietnam, does not constitute a direct response to the regional content requirements of the RVC; however, it aligns with the Plan Mexico 2030, which sets a goal of increasing national content by 15% in the value chains of strategic sectors such as automotive, aerospace, electronics, and semiconductors. The SDP is therefore a strategic instrument to strengthen the national ecosystem of suppliers, especially SMEs that have the potential to integrate into the supply chain.



Source: INA, with data from the World Bank

DURING ITS IMPLEMENTATION, THE PROGRAM ENVISIONS THAT 120 LOCAL COMPANIES WILL RECEIVE INDIVIDUALIZED DIAGNOSTICS, 55 OF THEM WILL BE TRAINED, AND 10 WILL HAVE ACCESS TO SPECIALIZED CONSULTING TO OBTAIN INTERNATIONAL CERTIFICATIONS, FUNDAMENTAL FOR THEIR INTEGRATION INTO GLOBAL VALUE CHAINS.

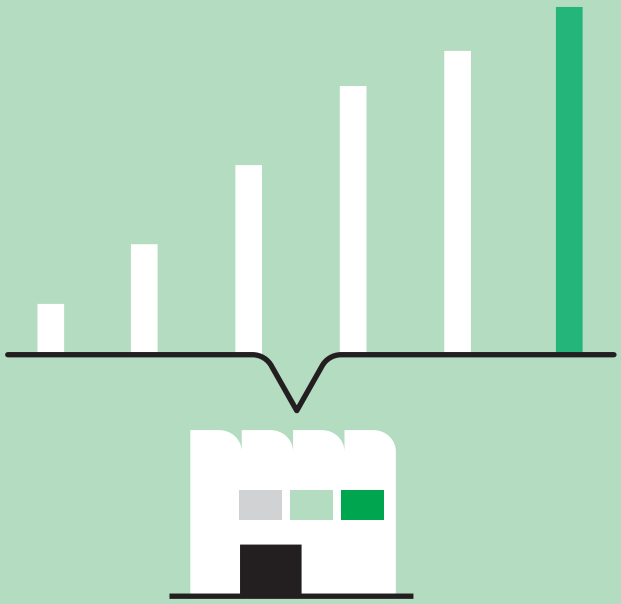


This initiative is a strategic effort to strengthen Mexico's industrial capacity and the competitiveness of Mexico and North America.
By empowering Mexican SMEs, it ensures that national manufacturing not only maintains its regional leadership but is also prepared to face the challenges of a constantly evolving industry.

Source: INA, with information from the World Bank and the Government of Mexico

II

SUPPLIER DEVELOPMENT PROGRAM PLAN MEXICO-IFC-INA



1

RECONFIGURATION OF SUPPLY CHAINS AND STRENGTHENING LOCAL SUPPLIERS

The realignment of supply chains has become a structural trend in the global economy. In an environment marked by geopolitical tensions, logistical disruptions, and new industrial policies, countries are seeking to strengthen their productive autonomy. In North America, this transformation is accelerating within the framework of the USMCA and the Mexico Plan, with particular emphasis on the automotive and auto parts sector. This new vision reflects the recognition that industrial resilience no longer depends solely on open trade, but also on the regional capacity to produce high-value-added goods.

Mexico has taken continuous steps to achieve this goal. According to statistics from the National Institute of Statistics and Geography (INEGI), between 2012 and 2020, the share of Mexican value added in exports increased from 65.7% to 77%.

These data illustrate the progress toward stronger integration in North American value chains and a strengthening of domestic content in strategic sectors. The next challenge is to broaden the base of local suppliers with strong technological and innovation capabilities that guarantee long-term competitiveness.

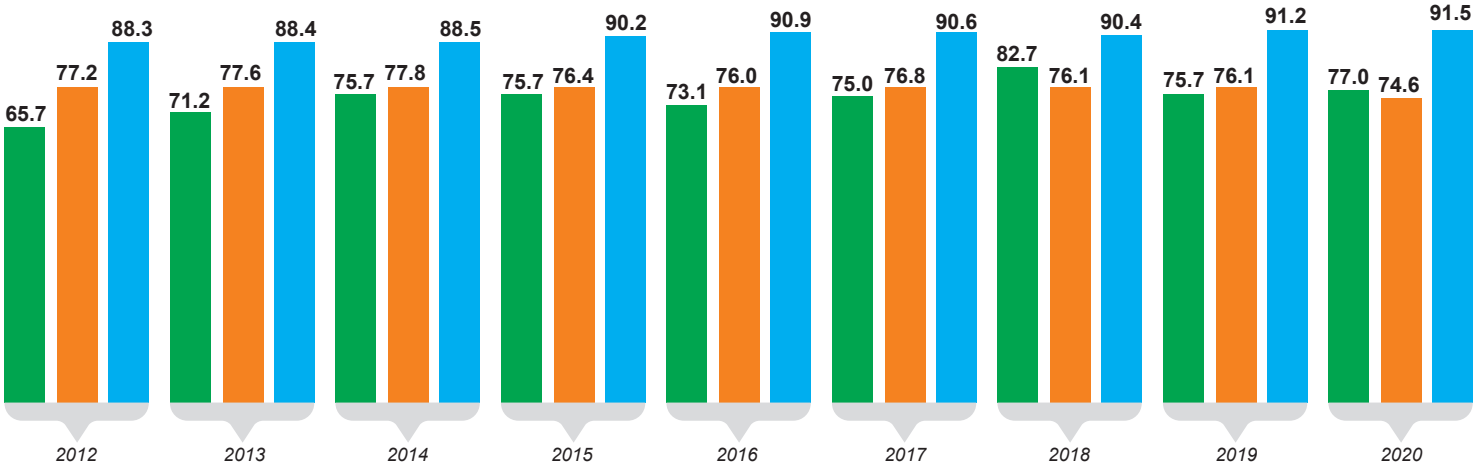
The SDP is part of this effort, integrating more national companies, primarily SMEs, into regional value chains in the auto parts sector. The program identifies, trains, and helps local companies achieve certification to international standards such as IATF 16949 and ISO 9001, where Mexico already holds a strong competitive position, with the goal of increasing supplier efficiency by 46%, and ensuring that at least half of the trained companies establish new business relationships with global automakers.

For further information on IATF 16949 and Plan Mexico, please refer to the links.

EXPORTS OF GOODS AND SERVICES

Share of domestic value added by country

Percentage share



Source: INA, with data from INEGI

2
SERVICES AND INPUTS DEVELOPED UNDER THE PROGRAM

THE PROGRAM STARTS WITH THE SPECIFIC SUPPLY NEEDS OF ANCHOR OR LEADING COMPANIES, AND THEN IDENTIFIES, EVALUATES, AND STRENGTHENS THE CAPABILITIES OF DOMESTIC SUPPLIERS ABLE TO MEET THOSE DEMANDS. IN THIS AREA, INA, AS THE LEADING ASSOCIATION IN THE SECTOR, COORDINATES THE OUTREACH AND DIALOGUES WITH TIER 1 AND TIER 2 COMPANIES, FACILITATING THE IDENTIFICATION OF KEY SOURCING REQUIREMENTS FOR THE IMPLEMENTATION OF THE SDP IN MEXICO.

A TOTAL OF 35 REQUIREMENTS WERE IDENTIFIED:

8 SERVICES

1. Automation and Integration Services
2. Manufacturing of assembly machines and automation services for auto parts assembly processes
3. Specialized preventive and corrective maintenance services for plastic injection molding equipment and machines
4. Design, manufacturing, and maintenance of high-precision plastic injection molds
5. Engineering, maintenance, and repair services for tooling
6. Technical support services for information technology, including monitoring, consulting, technical support, installation, configuration, repair, and troubleshooting of computer equipment and IT infrastructure
7. Collection, recovery, and disposal of waste and special-handling materials
8. Comprehensive EHS compliance and certification services

5 INDIRECT INPUTS

1. Manufacturing of heavy-duty cardboard packaging designed to protect metal parts during transport and storage
2. Supply of specialized industrial lubricants for plastic injection molding machines, compatible with high-temperature and high-pressure operations
3. Tooling: Specialized dies and cutting tools
4. Rubber accelerators
5. Materials used for abrasive blasting processes

22 DIRECT INPUTS

1. Raw materials and heat treatments for high-strength carbon steels
2. Forged and cold-drawn tubes of SCM 435 grade steel
3. Manufacturing of stainless steel tubes using the hydroforming (Blow Forming) process for automotive applications
4. Medium and large stamped parts from cold-rolled steel
5. Machining of parts from various steels to high-precision tolerances
6. Production of cast iron parts for structural components of brake systems
7. Corrosion-resistant surface finishing for assemblies, tubing, and stampings for small and large steel parts
8. Specialized carbon steel bolts with galvanized coatings
9. Raw materials of carbon steel, stainless steel, and aluminum sheets
10. Metal stampings intended to substitute imports currently sourced from Turkey
11. Manufacturing of inserts, clips, and wire forms in materials such as brass, bronze, and aluminum
12. Production and machining of aluminum castings (High Pressure Die Casting) with partial anodizing and future technologies such as friction stir welding
13. Production of aluminum die castings for brake system valves in heavy vehicles.
14. Casting of aluminum and stainless steel parts for cooling system and engine components.
15. Extrusion and passivation of aluminum parts.
16. Surface finishing for non-ferrous material parts, small aluminum and copper stampings for electrical connectivity in the electronics sector.
17. Full and selective coatings for metal inserts used in hybrid plastic-metal parts.
18. Manufacturing of high-strength plastic injection molded parts for heavy and medium commercial vehicles.
19. Production of electric motors, vents, and plastic parts for automotive radiator systems.
20. Supply of high-quality plastic raw materials and polymers, engineering polymers for injection molding processes.
21. Manufacturers of plastic resins as raw materials, produced in Mexico or compliant with USMCA regional content requirements
22. Vibration welding processes for joining plastic parts

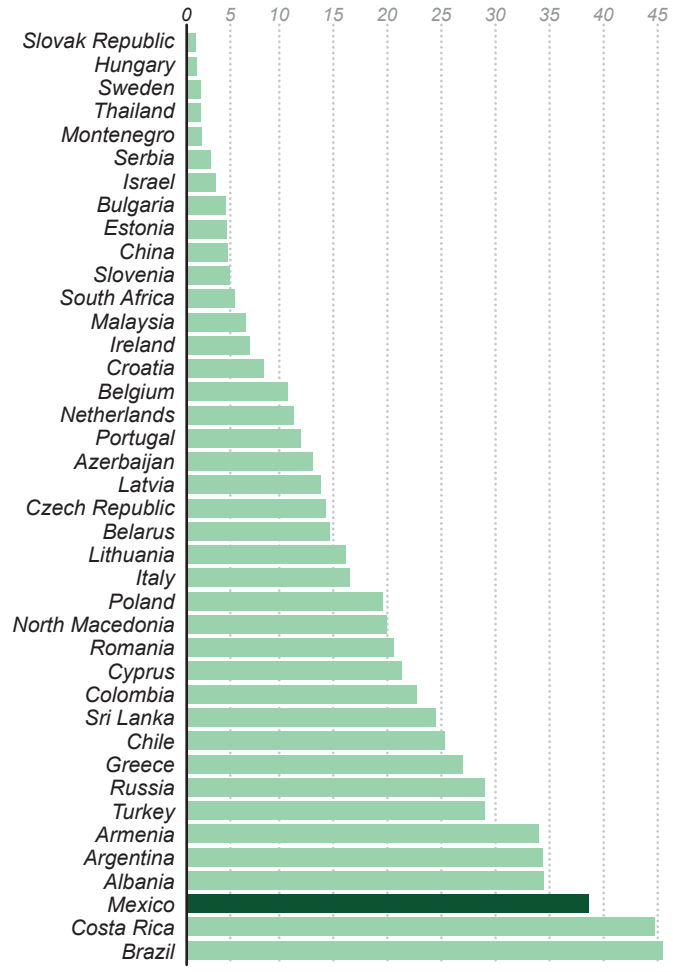
3
FINANCING

The implementation of the SDP is coordinated by IFC-INA, with the objective of facilitating the participation of state governments, automotive clusters, and other key stakeholders. It combines financing, advisory services, and upstream co-investment, supporting companies from project conception to execution. We have the support of Mexico's National Bank for Foreign Trade (Bancomext) and Nacional Financiera (Nafin).

Financing is key to this process because, according to the World Bank, access to long-term bank financing supports higher export and investment levels, thereby increasing the likelihood that a domestic firm will become an exporter. A one percentage point increase in capital is associated with a 0.7% increase in export sales growth.

Medium-sized companies in Mexico, Brazil, Costa Rica, Argentina and Turkey identify access to financing as the main obstacle to their growth.

ACCESS TO FINANCING REMAINS A MAJOR CONSTRAINT



Note: Latest available data for all countries, a selection of high-income and upper-middle-income countries. The data correspond to medium-sized enterprises, defined according to the ES methodology as those with between 20 and 99 employees.

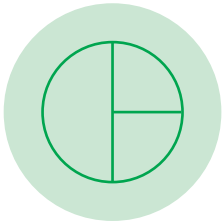
THEREFORE, THE SDP ENTAILS NO COST FOR PARTICIPATING COMPANIES, AS IT IS AN EXPRESSION OF INA AND IFC'S COMMITMENT TO STRENGTHENING THE AUTO PARTS MANUFACTURING ECOSYSTEM IN MEXICO.

4
WHO IS IT FOR?

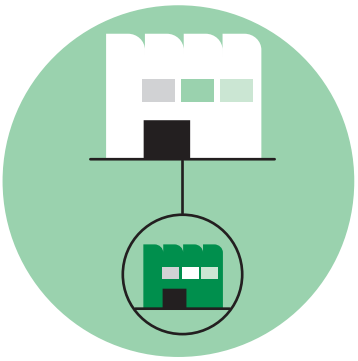
The program is aimed at:

Mexican auto parts companies with majority domestic ownership

Companies with valid tax registration status



Companies interested in integrating into or expanding their participation in global value chains



Companies with or without a prior relationship with an anchor company

Companies seeking training and internationally recognized certifications

5
EXPECTED RESULTS

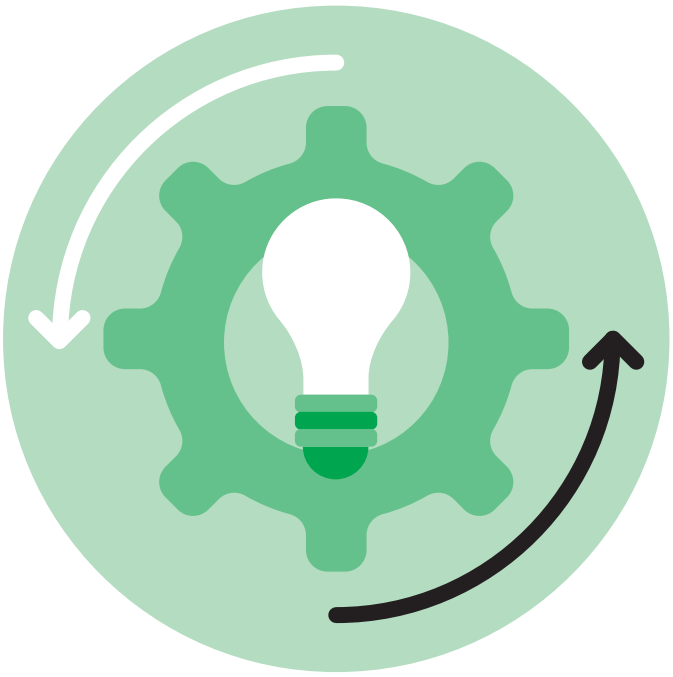
AS A DEVELOPMENT PROGRAM ALIGNED WITH THE HIGHEST INTERNATIONAL STANDARDS, COMPANIES WILL STRENGTHEN THEIR CAPABILITIES IN AREAS SUCH AS:

Leadership and Management:
Strategic vision, business models, customer insight, and commitment to to social and environmental responsibility.

Performance management:
Financial strategy and increasing business value creation.

Source: INA, with data from the World Bank

Operations Management:
Production systems management, quality management fundamentals and applicable standards, compliance with regulations and standards across automotive industry segments, talent management, environmental management, logistics and warehousing, fundamentals of foreign trade, marketing and digital commerce, digital transformation, AI and cybersecurity.



Innovation Management:
Innovation and technology management, project management, continuous improvement and minimum viable product (MVP) development.

FURTHERMORE, THE PROGRAM AIMS TO ENSURE THAT THE NEEDS—INPUTS OR PROFESSIONAL SERVICES—OF THE ANCHOR COMPANIES PARTICIPATING IN THE PROGRAM CAN BE MET BY PARTICIPATING SMES, STRENGTHENING LOCAL SUPPLIERS IN THE AUTO PARTS SECTOR, FOSTERING TRADE LINKS, AND PROMOTING THE DEVELOPMENT OF NATIONAL INDUSTRY.

6
BENEFITS OF THE PROGRAM FOR SMEs

Access to New Markets and Business Partnerships

The SDP was designed as a demand-driven model from large companies in the automotive sector. This allows Mexican SMEs to connect directly with anchor companies that account for 43% of U.S. auto parts imports.

By creating these opportunities, SMEs not only gain access to the domestic market, but also to the regional trade of the USMCA, where auto parts account for more than $120 billion annually.

Technical training to meet international standards

Advanced training focused on infrastructure and production processes.

This training is aligned with the requirements of the North American automotive industry, which demands high levels of quality and traceability.

Integration into global value chains

The SDP aims to increase domestic content in value chains by 15%, in line with the Plan Mexico 2030.

Selected SMEs can integrate into production processes in which automotive components may cross the border up to eight times before becoming part of a finished vehicle.

International certifications

The SDP offers support for SMEs to obtain key certifications such as IATF 16949, an essential standard for supplying automakers and Tier 1 suppliers.

Mexican suppliers will be able to compete on equal footing with global companies and participate in international tenders.

Specialized consulting

Up to twenty participating companies will be selected to receive personalized consulting focused on strategic topics such as advanced manufacturing processes, quality management, digitalization of operations, and product development.
This support helps close specific capability gaps and accelerate integration into the supply chain.

Development Finance

The support of NAFIN-Bancomext ensures that the program provides SMEs with financial solutions tailored to their needs. This is key to overcoming capital limitations and enabling investment in technological improvements, certifications, and expansion of production capacity. *The program offers flexible long-term financing options (5 to 30 years), including debt, equity, and hybrid structures, as well as sustainability instruments (green and sustainability-linked loans).*

Innovation, digitalization, and sustainability

The program promotes the technological transformation of participating companies, aligning with trends such as electromobility and smart manufacturing as drivers of industrial growth.

7
VALUE PROPOSTION FOR ANCHOR COMPANIES

Address Specific Sourcing Needs

The SDP begins with a preliminary assessment that identifies the specific needs of the anchor companies, whether for inputs or professional services.

This ensures that the selected suppliers are aligned with their requirements for quality, production capacity, innovation, and sustainability, reducing the risk of non-compliance.

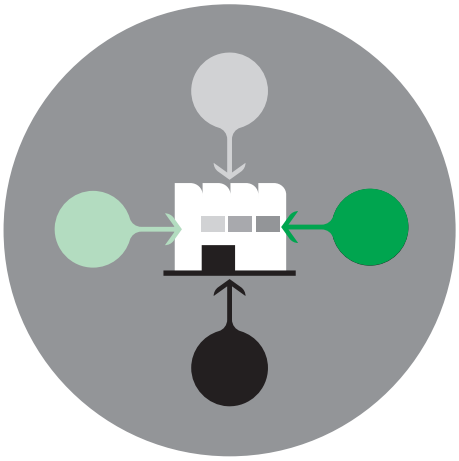
Reduced Procurement Costs

By strengthening certified and skilled local suppliers, anchor companies reduce their dependence on imports from outside the region.

This not only shortens logistics times but also reduces costs related to transportation, inventory, and tariffs, which can currently reach up to 25% for products outside the USMCA.

Improved Traceability

The SDP's technical support enables SMEs to adopt better quality control systems and international certifications such as IATF 16949.
For anchor companies, this translates into more robust traceability for each component, a critical element in a sector where parts cross borders up to eight times before being integrated into the final vehicle.



Strengthening the supply chain

Anchor companies diversify and secure their supply chains, reducing their exposure to global disruptions. This builds a more resilient and integrated supply chain.

New business opportunities

By working with stronger domestic suppliers, anchor companies not only meet their immediate needs but can also explore joint projects in innovation, electromobility, and digital manufacturing. This encourages product diversification, the incorporation of new technologies, and the shared development of solutions for the North American and global markets.

8
APPLICATION PROCESS

Registration
Interested companies submit the required documentation through the designated platform.

Interview
After the self-assessment is submitted, the program team conducts an interview to validate the results.
At the end of the process, a report is delivered outlining the diagnostic results and identifying the company's strengths, weaknesses, and recommendations.

Supplier Capability Self-Assessment

Companies that meet all the registration requirements participate in a workshop to learn how to use the digital self-assessment tool. *They then submit their self-assessment to identify their capabilities and potential.*

Supplier selection

Fifty-five companies are selected from the applicant pool to participate in the training program are announced. *The selection criteria are based on the needs of the anchor companies and the the availability of the minimum required capabilities.*

PARTICIPATING COMPANIES:
1st GENERATION

Company	Location	Website	Product	Supplier category
Adriano Engineering	*Nuevo Leon*	*https://adrianoengineering.com*	*Engineering*	*Engineering and development*
AGA Logística Ambiental	*Chihuahua*	*https://www.agademexico.com.mx*	*Environmental logistics*	*Logistics, packaging and environmental*
Alian Plastics	*Nuevo Leon*	*https://www.alian.mx*	*Plastics injection*	*Plastics and polymers*
ALT Ingeniería	*Queretaro*	*https://www.altingenieria.mx*	*Engineering*	*Engineering and development*
Anodizing & Ecoat México	*Queretaro*	*https://www.anodizing.mx*	*Anodizing and e-coating*	*Special processes*
Besoul Automation	*San Luis Potosi*	*https://besoulautomation.com.mx*	*Robotics*	*Automation and machinery*
C&C Compañías	*Queretaro*	*https://www.ccmaq.com*	*Automation*	*Automation and machinery*
CID Precision Tools	*Puebla*	*https://cidprecision.com*	*Precision CNC Machining*	*Metal and machined components*
CIDESI	*Queretaro*	*https://www.cidesi.com*	*Engineering*	*Engineering and development*
Cleanlab Solutions	*Queretaro*	*https://cleanlabsolutions.com*	*Laboratory*	*Quality, laboratory and metrology*
Clusol Mexicana	*Queretaro*	*https://www.clusolmexicana.com.mx*	*PTFE Coatings*	*Special processes*
Conplasa	*Aguascalientes*	*https://www.conplasa.com.mx*	*Industrial plastics*	*Plastics and polymers*
Crepé del Bajío	*Guanajuato*	*https://crepebajio.com.mx*	*Plastic films*	*Plastics and polymers*
Cuma Metal Manufacturing	*Queretaro*	*https://www.cumametal.com.mx*	*Machining*	*Metal and machined components*
Dacel Industrial	*Chihuahua*	*https://www.dacel.com.mx*	*Component machining*	*Metal and machined components*
Dismetronic Industries	*Queretaro*	*https://www.dismetronic.tech*	*IoT*	*Electrical/electronic*
Especialidades Térmicas	*Estado de Mexico*	*https://www.especialidadestermicas.com*	*Heat treatment*	*Special processes*
Grupo Bolca	*Aguascalientes*	*https://grupobolca.com*	*Precision machining*	*Metal and machined components*
Grupo Cubits	*Sonora*	*https://www.grupocubits.mx*	*Industrial Engineering*	*Engineering and development*
Grupo IPISA	*Estado de Mexico*	*https://www.ipisa.ws*	*Lubricants*	*MRO and indirect inputs*
Grupo Rosa Automatización	*Chihuahua*	*https://www.gruporosa.com.mx*	*Robotics*	*Automation and machinery*
HH Aleaciones	*Sonora*	*https://www.hhaleaciones.com*	*Metal alloys*	*Metal and machine components*
Imeyco	*Aguascalientes*	*https://www.imeyco.com.mx*	*PLC*	*Automation and machinery*
Industrias Volfre	*Hidalgo*	*https://www.proeesa.com.mx*	*Connectors*	*Electrical/electronic*
Innocentro Aeroespacial	*Baja California*	*https://www.innocentro.com*	*Precision machining*	*Metal and machined components*
Innovaa Ingeniería	*Queretaro*	*https://www.innovaaingenieria.com*	*Engineering*	*Engineering and development*
INNOVET	*Queretaro*	*https://innovet.com.mx*	*Thermoforming*	*Plastics and polymers*
Intekel Tecnología	*Veracruz*	*https://www.intekel.com*	*Industrial control*	*Automation and machinery*
ISGO Manufacturing	*Nuevo Leon*	*https://www.isgo.tech*	*Plastics injection*	*High-engineering plastic components*

PARTICIPATING COMPANIES:
1st GENERATION

Company	Location	Website	Product	Supplier category
Koragg México	*Estado de Mexico*	*https://www.koraggmexico.com*	*Surface treatments*	*Special processes*
Liant Technologies	*Coahuila*	*https://www.lianttechnologies.com*	*IoT*	*Automation and machinery*
Linmex Lubricantes	*Queretaro*	*https://linmex.mx*	*Lubricants*	*MRO and indirect inputs*
Lobmaq	*Durango*	*https://www.lobmaq.com*	*Machinery*	*Automation and machinery*
Maquitools	*Queretaro*	*https://www.maquitools.com.mx*	*Tools*	*Tooling*
Master Cut	*Nuevo Leon*	*https://www.mastercut.com.mx*	*Laser cutting*	*Metal and machined components*
Metalistik	*Aguascalientes*	*https://www.metalistik.com*	*Metallurgy*	*Metal and machined components*
MITCEN	*Puebla*	*https://www.mitcen.com.mx*	*Industrial machining*	*Metal and machined components*
Necontech México	*Sonora*	*https://www.newconcepttech.com*	*Plastic injection*	*Plastic injection, high-speed stamping (terminals, electrical contacts) and assembly*
Pamec Solutions	*Queretaro*	*https://www.pamecsoluciones.com.mx*	*Lean manufacturing*	*Engineering and development*
Peasa Autopartes	*San Luis Potosi*	*http://peasa.com.mx/*	*Steel tubes*	*Metal and machined components*
Proveedora de Cajas Especiales	*Jalisco*	*https://www.cajas-especiales.com.mx*	*Packaging*	*Logistics, packaging and environmental*
PSV	*Chihuahua*	*https://www.psv.com.mx*	*Logistics*	*Logistics, packaging and environmental*
QIS Reynosa	*Tamaulipas*	*https://www.integralmfc.com*	*Flexible manufacturing*	*Metal and machined components*
R&R Autoindustrial	*Queretaro*	*https://www.rrintegraciones.com.mx*	*Quality*	*Quality, laboratory and metrology*
Raloy Lubricantes	*Estado de Mexico*	*https://www.raloylubricantes.mx*	*Lubrication*	*MRO and indirect inputs*
Resortes Industriales Tollan	*Hidalgo*	*https://www.resortestollan.com.mx*	*Industrial springs*	*Metal and machined components*
SITCAM	*Durango*	*https://www.sitcam.mx*	*Waste*	*Logistics, packaging and environmental*
Spyro	*Queretaro*	*https://www.grupospyro.com*	*Product engineering*	*Engineering and development*
Steel & Trucks	*Nuevo Leon*	*https://www.steelandtrucks.com*	*Metal structures*	*Metal and machined components*
SV Tooling	*Aguascalientes*	*https://www.svtooling.com*	*Tooling*	*Tooling*
Takasago Engineering	*Queretaro*	*https://takasagomexico.com*	*Chemical engineering*	*Engineering and development*
TMIC	*Queretaro*	*https://www.tmicnet.com*	*Metrology*	*Quality, laboratory and metrology*
Tyrsa Troquelados	*Queretaro*	*https://www.troqueladostyrsa.com*	*Stamping*	*Metal and machined components*
Unicar Plastics	*Puebla*	*https://www.unicarplastics.com*	*Plastic injection*	*Plastics and polymers*
WDF Services	*Baja California*	*https://wdfservices.odoo.com*	*Inspection*	*Quality, laboratory and metrology*
Zuma Control	*Chihuahua*	*https://www.zumacontrol.com*	*Automation*	*Automation and machinery*

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ACRONYMS

ADAS: *Advanced Driver Assistance Systems*

BCG: *Boston Consulting Group*

BEV: *Battery Electric Vehicle*

CAGR: *Compound Annual Growth Rate*

CENEVAL: *National Center for Higher Education Evaluation*

EHS: *Environment, Health, and Safety*

EBIT: *Earnings Before Interest and Taxes*

eREV: *Extended-Range Electric Vehicle*

EV: *Electric Vehicle*

HW: *Hardware*

AI: *Artificial Intelligence*

IATF 16949: *International Automotive Task Force, automotive quality standard*

ICE: *Internal Combustion Engine*

FDI: *Foreign Direct Investment*

IFC: *International Finance Corporation (World Bank Group)*

INA: *National Auto Parts Industry Association*

INEGI: *National Institute of Statistics and Geography*

ISO 9001: *International Organization for Standardization, quality management standard*

L0: *No automation*

L1: *Driver assistance*

L2: *Partial automation*

L3: *Conditional automation*

L4: *High automation*

L5: *Full automation*

MEMA: *Motor & Equipment Manufacturers Association (United States)*

MVP: *Minimum Viable Product*

OEM: *Original Equipment Manufacturer*

SDP: *Supplier Development Program*

PHEV: *Plug-in Hybrid Electric Vehicle*

SHEV: *Series Hybrid Electric Vehicle*

SW: *Software*

USMCA: *United States–Mexico–Canada Agreement*

RVC: *Regional Value Content*

CONCLUSION

Through these actions, INA is strengthening the value chain in Mexico and North America by promoting a supplier development model that directly addresses the real needs of the industry and the challenges of the new automotive environment. The INA-IFC Program identifies the specific requirements of anchor companies and integrates Mexican SMEs through diagnostics, training, certifications, and access to financing, enhancing their technological capabilities and traceability to scale within global supply chains.

This approach contributes to increasing domestic content, reducing dependence on external inputs, and preparing suppliers for electromobility and advanced manufacturing.

This contributes to a more resilient and competitive production network, consolidating Mexico's leadership in the region and reaffirming the INA's commitment to the future of the automotive industry.

Plan México

IFC International Finance Corporation WORLD BANK GROUP

Industria Nacional de Autopartes, A.C.