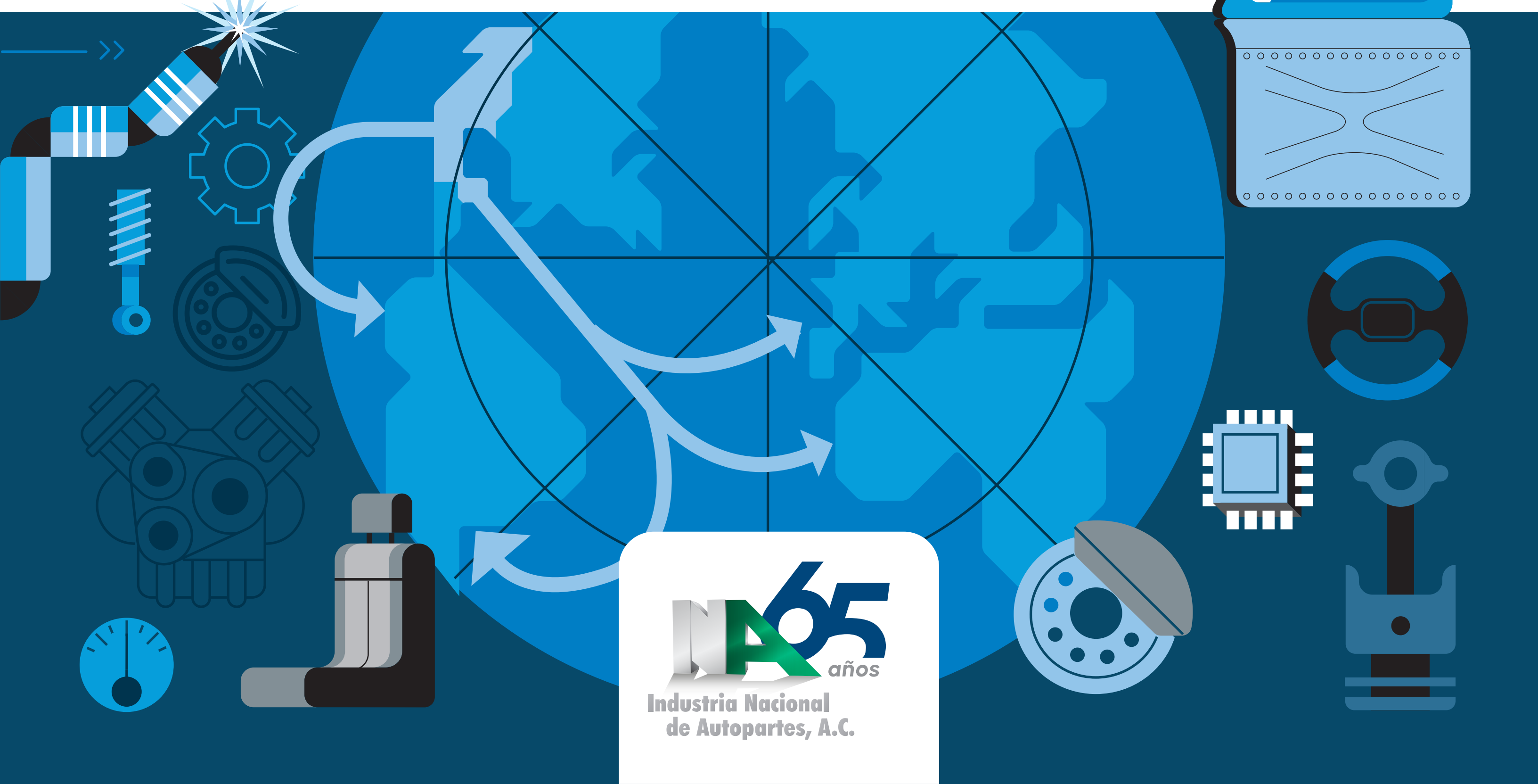
THE OTHER SIDE OF THE COIN

CHAPTER 6
THE AFTERMARKET IN THE MEXICAN AUTOMOTIVE INDUSTRY



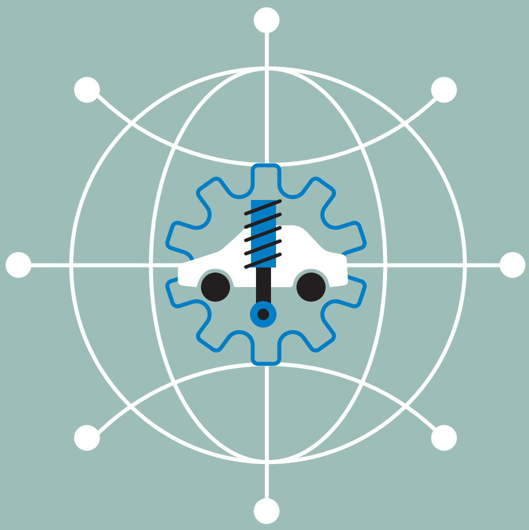
KEY IDEAS

Tables, figures and charts

I

THE AFTERMARKET

IN THE AUTOMOTIVE INDUSTRY



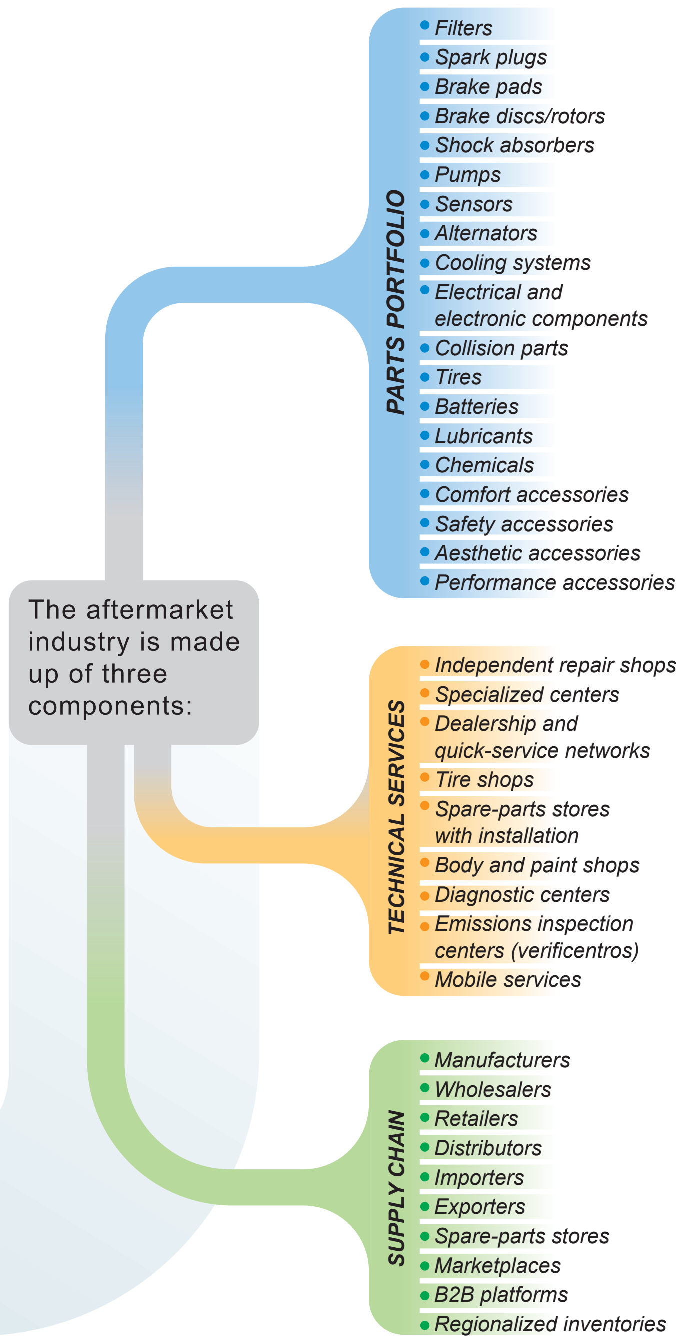
The National Auto Parts Industry expresses its sincere gratitude to the National Institute of Statistics and Geography (INEGI) for the support it has provided and for its ongoing commitment to ensuring that the information collected by the agency can be effectively accessed by the country's strategic sectors. Its collaboration has been essential to advancing a more precise understanding of the aftermarket in Mexico, as well as to identifying, based on reliable and accurate data, the industry's needs, challenges, and opportunities.

Thanks to the information generated by INEGI, it is now possible to publish this document and promote analytical tools such as the INA Aftermarket Monitor, a platform that improves planning, competitiveness, and decision-making within the national automotive ecosystem.

The automotive aftermarket comprises the goods, services, technical capabilities, and commercial channels that support a vehicle after its initial sale..

It goes well beyond selling spare parts. It also covers preventive maintenance, corrective repair, diagnostics, installation, accessories, consumables, tires, batteries, lubricants, tools, workshop equipment, technical software, body and paint services, remanufacturing, logistics, distribution and digital commerce. In industrial terms, it is the vehicle's "second economic cycle." It starts when the unit enters circulation and runs throughout its useful life.

The aftermarket exists because the automobile is a mechanical, electrical, electronic and digital system. As such, it is subject to wear, failure, obsolescence, accidents, updates and changes in use. Every kilometer driven uses up components like oil, filters, brakes, tires, belts and shock absorbers. Each one also brings a need for inspection, adjustment, diagnosis and replacement.



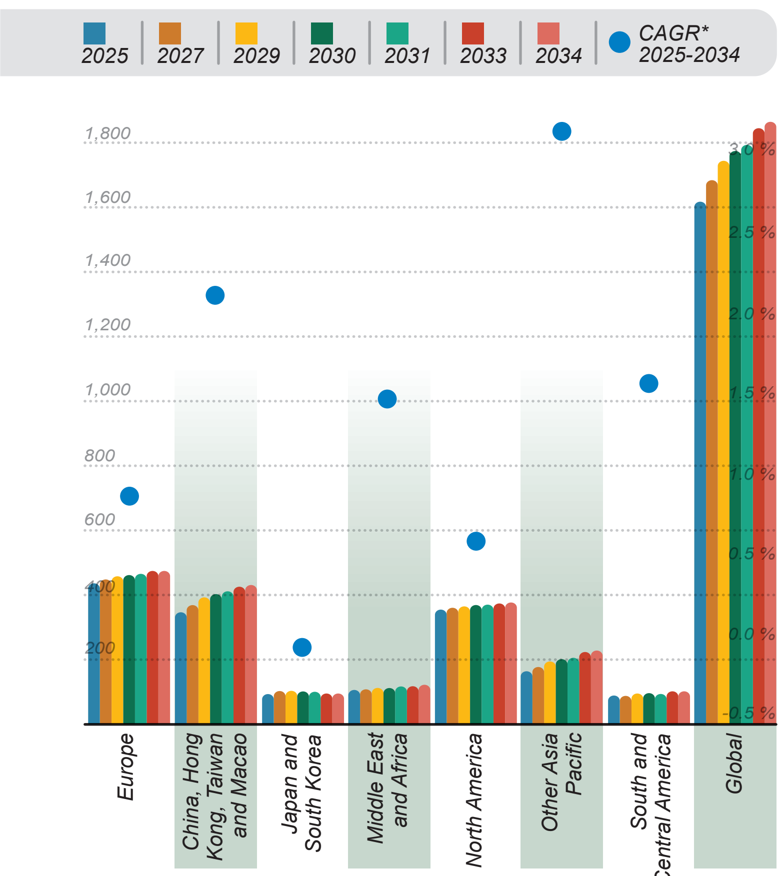
So this is not an industry that only makes, distributes and sells parts and components. It also provides maintenance and repair services for every type of vehicle on the road.

1
WHY IS THE AFTERMARKET RELEVANT?

The relevance of the aftermarket ties directly to the size of the vehicle fleet. Worldwide, the number of vehicles in use is expected to continue growing, reaching 1.9 billion light-duty vehicles in 2034, up from 1,600 million in 2025. Rising prices for new vehicles, uncertainty surrounding battery electric vehicles (BEVs), and the reliability of older vehicles along with affordable maintenance, are key factors that have contributed to the increasing age of vehicle fleets.

VEHICLES IN OPERATION (VIO) FOR KEY REGIONS

Millions of vehicles



*Compound annual growth rate.

Source: INA with S&P Global data.

In the specific case of Mexico, INEGI reports 54.3 million vehicles in operation, representing a 43% increase over the past decade and defining the potential demand base for spare parts, maintenance and repair in the country.

MOTOR VEHICLES

Light-duty vehicles, passenger buses and freight trucks

millions of units

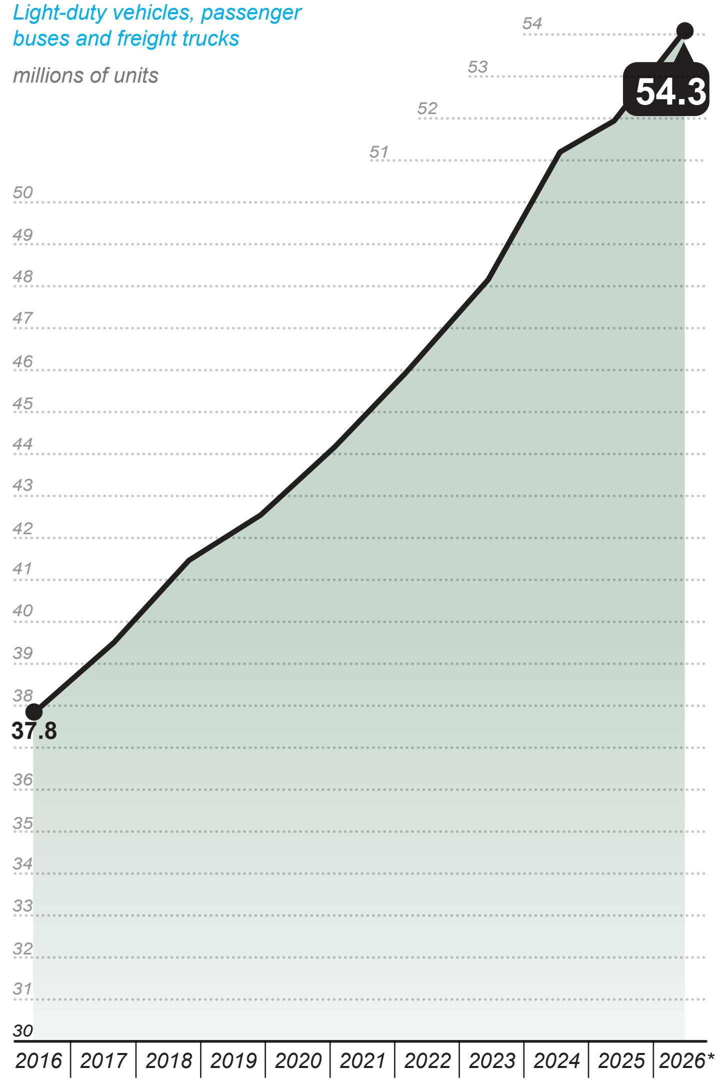


*Figure as of May 2026.

Source: INA with INEGI data.

The vehicle fleet takes in different vehicle classes and service types. That makes it possible to size the distinct needs of private cars, passenger transport and freight units. So the aftermarket does not hang on new-vehicle sales alone. Above all, it depends on the size, age, intensity of use, technological complexity and operating conditions of the units already on the road. In Mexico, the average vehicle is 16.2 years old, and about 66% of units are under 20 years old. That puts Mexico's vehicles among the oldest in the world.

MOTOR VEHICLES

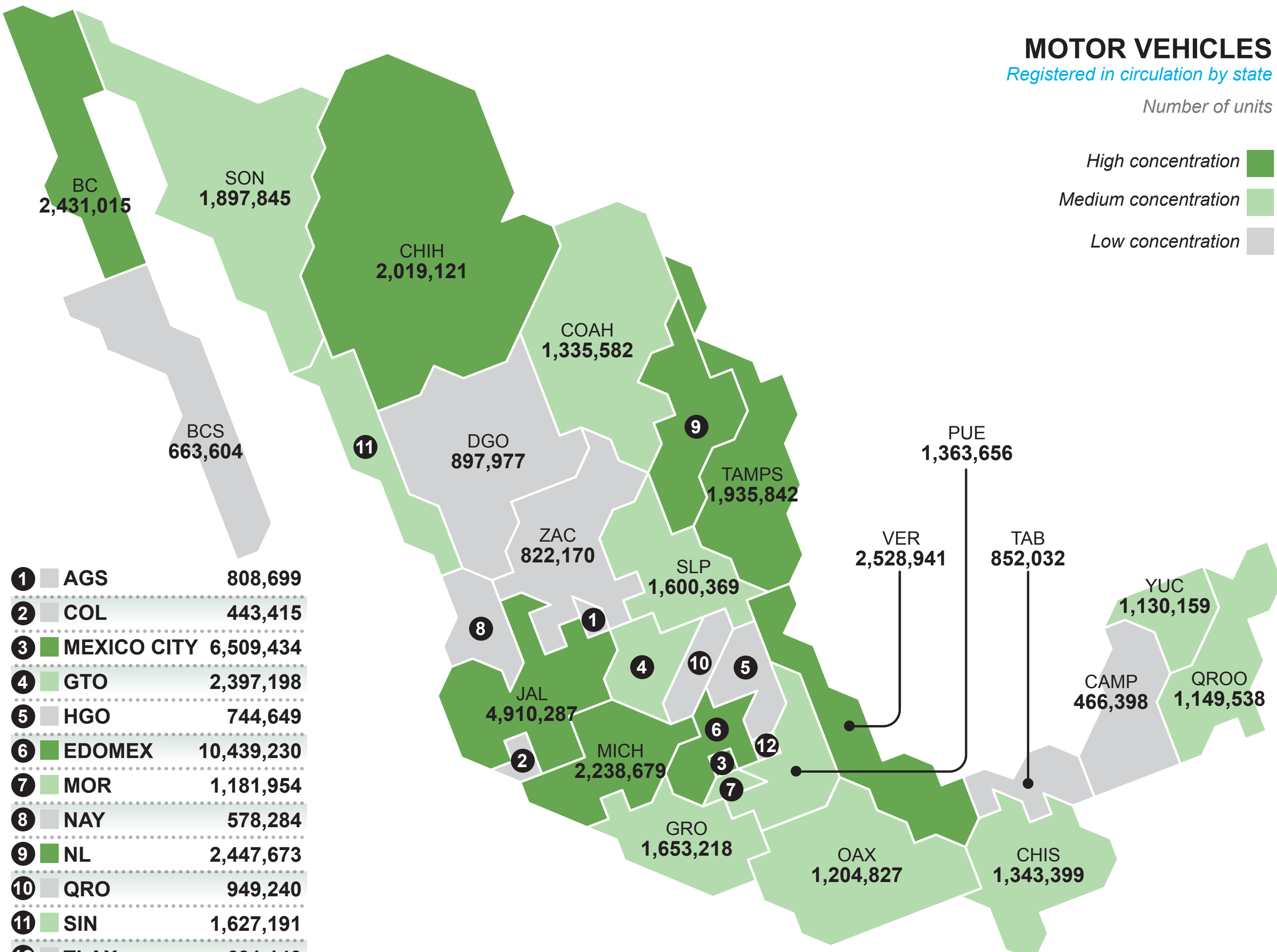
Registered in circulation by state

Number of units

High concentration

Medium concentration

Low concentration



1	AGS	808,699
2	COL	443,415
3	MEXICO CITY	6,509,434
4	GTO	2,397,198
5	HGO	744,649
6	EDOMEX	10,439,230
7	MOR	1,181,954
8	NAY	578,284
9	NL	2,447,673
10	QRO	949,240
11	SIN	1,627,191
12	TLAX	691,140

Source: INA with INEGI data

**The map includes motorcycles.*

On the technology side, advanced driver assistance systems (ADAS) are catching on fast. As they spread across the vehicle fleet, they open up new maintenance and repair work in the parts market, including calibration and replacement services.

By 2035, more than 1,100 million vehicles in operation worldwide are expected to be equipped with various levels of ADAS, with a compound annual growth rate (CAGR) of 8.5%. Furthermore, adoption is projected to reach 71% of vehicles in operation by 2035, compared to 38% in 2025. By 2035, 69% of vehicles in North America and 62% in Europe will be equipped with ADAS, representing a significant increase from current levels.

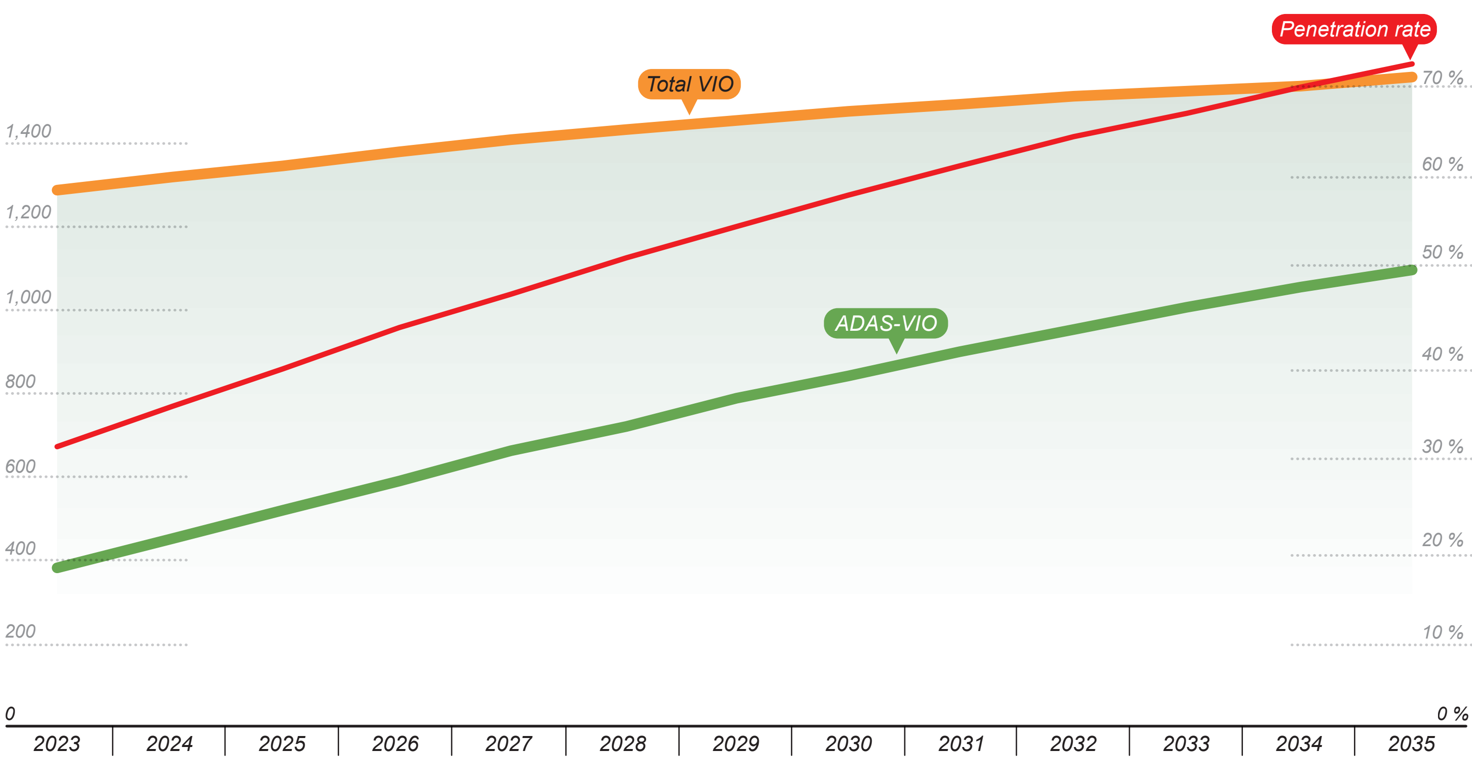
Finally, a key factor for the aftermarket industry is its lower exposure to external shocks compared to the auto parts sector for vehicle assembly or the new vehicle market, since demand in this sector is closely linked to the number of vehicles in circulation within the domestic market.

However, S&P Global warns that, although the aftermarket is better positioned than most retail subsectors to weather tariff increases, supply chain players will need to strengthen their diversification strategies to ensure business continuity in the face of potential trade, logistics, or market disruptions.

FORECAST

Vehicles in operation (VIO) equipped with ADAS

Millions of vehicles



Source: INA with S&P Global data.

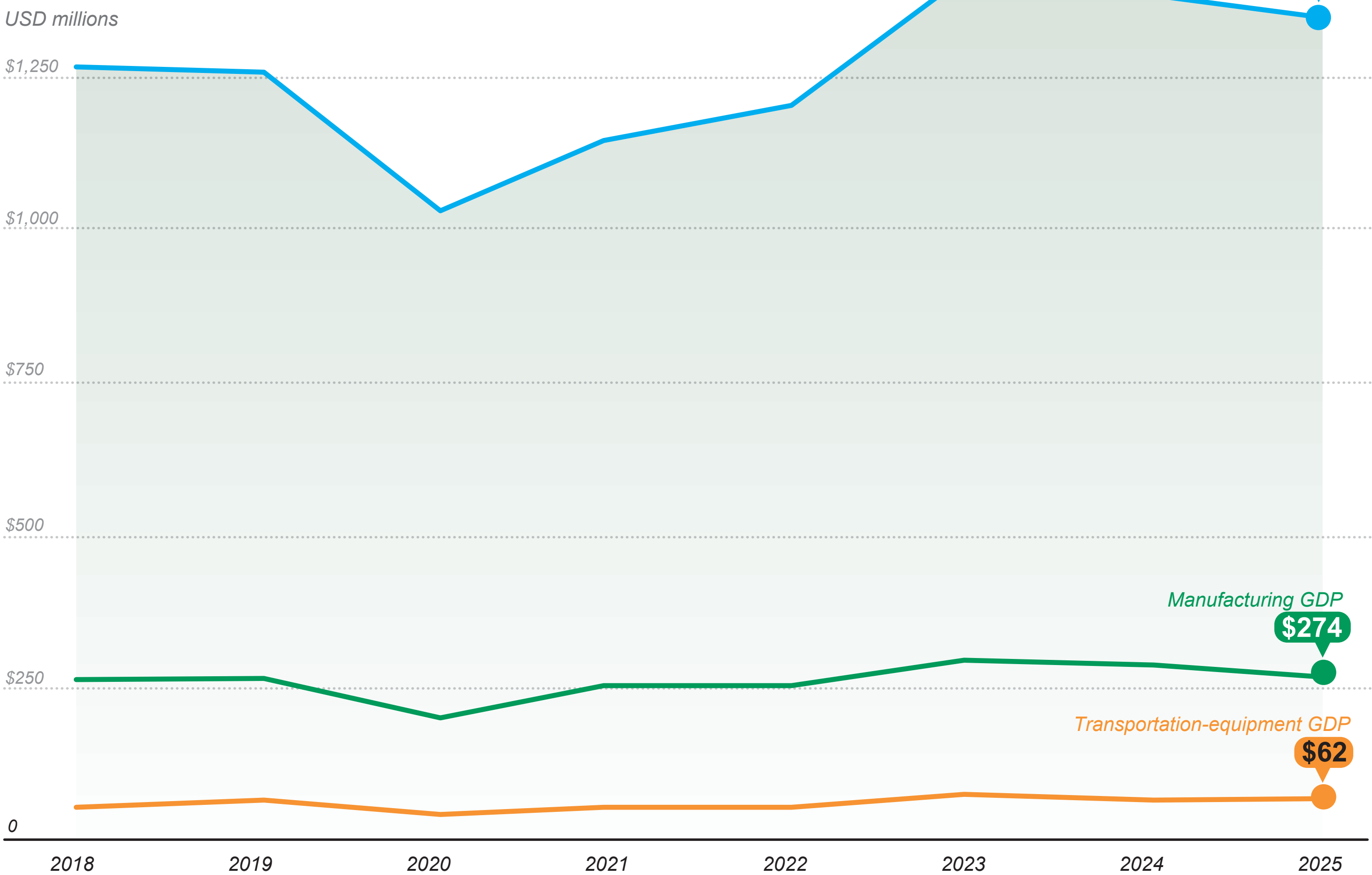
2
THE GROWING AFTERMARKET DEMAND IN MEXICO

Any full read of the aftermarket's place in the Mexican economy has to start with where it sits in the national productive structure. In 2025, Mexico's real GDP stood at USD 1.35 trillion, and manufacturing made up 20.3% of it. Within manufacturing, transportation-equipment carried real strategic weight: 22.6% of manufacturing GDP and 4.6% of total GDP.

These figures confirm something important. The automotive industry is not just one of the main engines of national manufacturing. It also builds the productive, technological and commercial base that the market for replacement parts, maintenance and vehicle repair sits on.

GDP

Manufacturing and transportation equipment as a part of total GDP

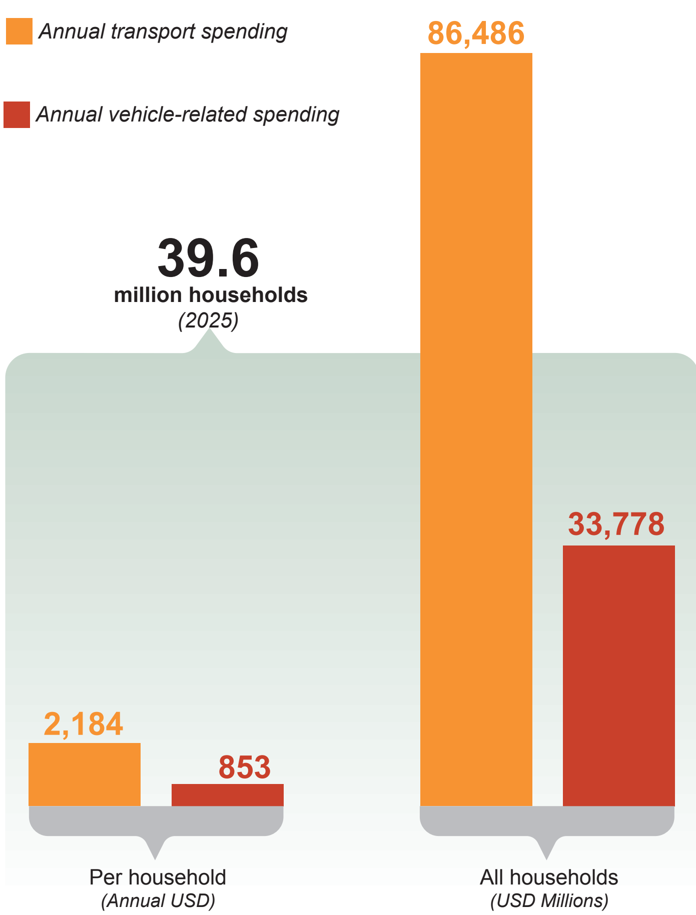


Source: INA with INEGI data

On the demand side, household spending backs up this productive weight. In 2025, Mexico had 39.6 million households, each spending close to USD 2,184 a year on transport. That category takes in vehicle purchases, maintenance, accessories, vehicle services and communications. The part tied directly to vehicle use and upkeep, namely spare parts, accessories, maintenance, fuel and automotive services, came to USD 853 per household. That is 39% of what Mexican households spend on transport overall.

This growth in spending is driven by the increasing number of Mexican households owning cars. Between 2018 and 2025, car ownership rose from 34.6 to 42.4 units per 100 households, reflecting a steady increase in the adoption of cars as everyday assets.

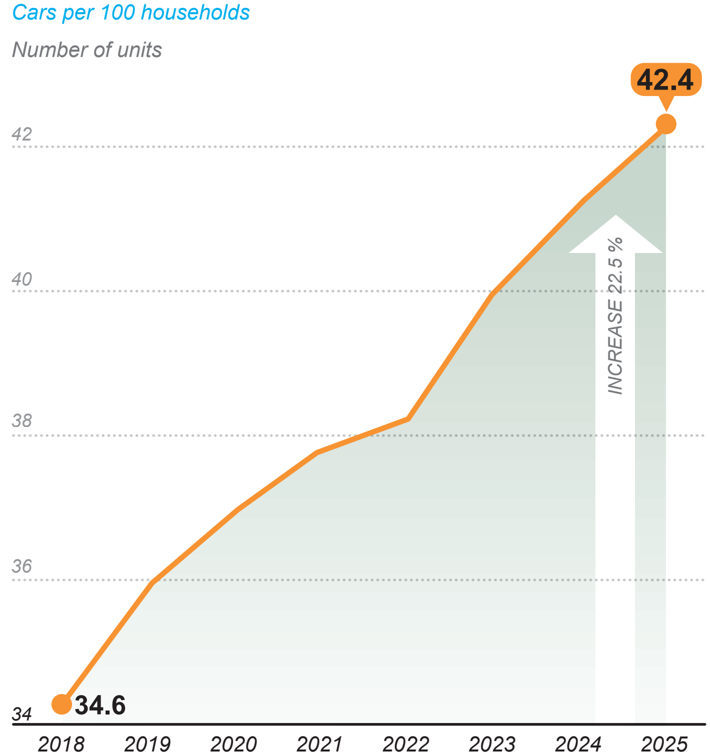
This increase has direct implications for the aftermarket. As more households own a car, the potential consumer base for auto parts, accessories, maintenance, fuel, and automotive services expands. Consequently, the growth of the household vehicle fleet not only strengthens immediate demand for aftermarket products and services but also generates a pattern of recurring consumption throughout the vehicle's lifecycle.



Source: INA with INEGI and Bank of Mexico data.

MOTOR VEHICLES

Cars per 100 households



Source: INA with INEGI data.

II

CONTRIBUTIONS OF THE AFTERMARKET

TO MEXICO'S ECONOMY

1

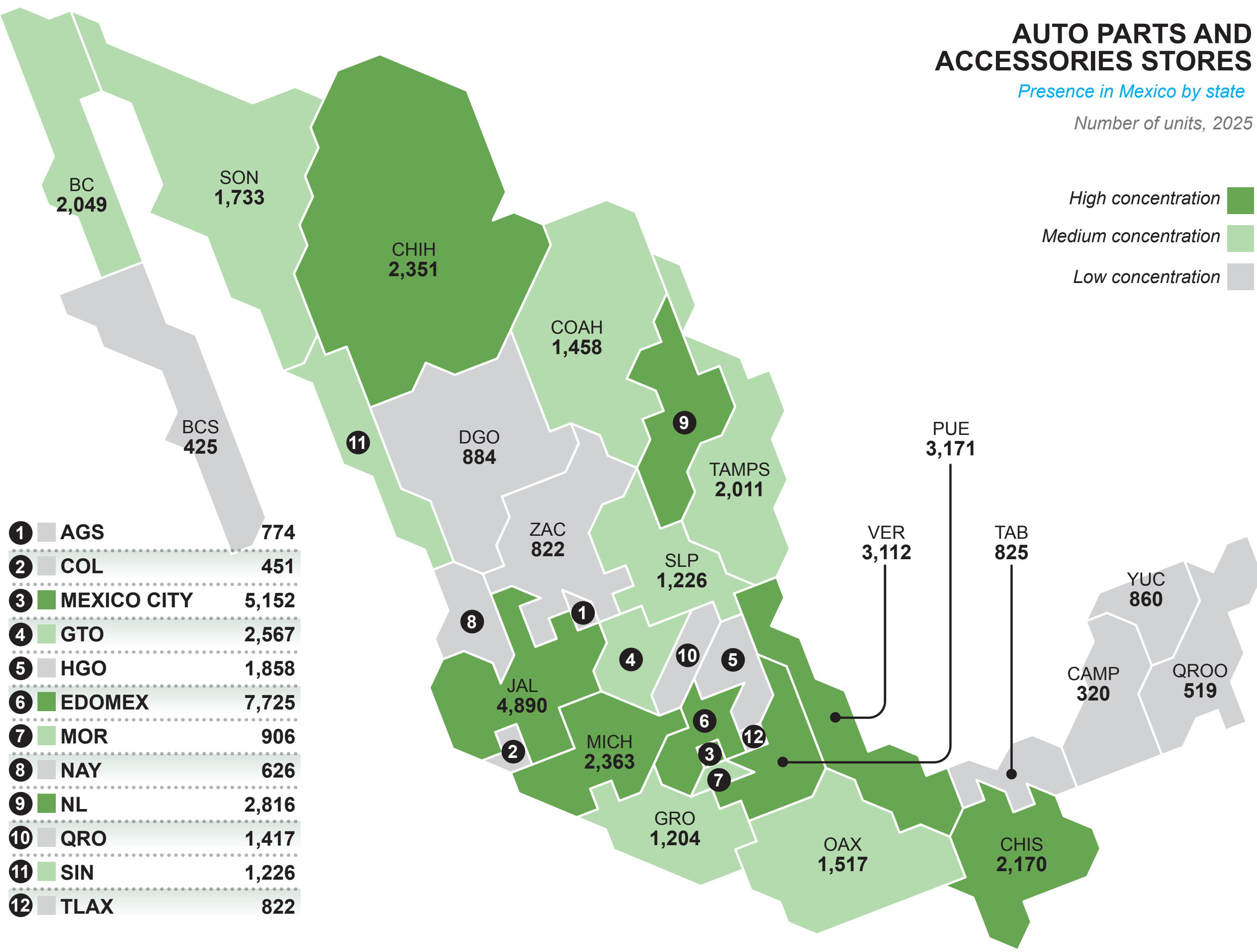
EMPLOYMENT AND INCOME LINKED TO THE AFTERMARKET

The aftermarket's economic relevance lies not only in its scale of consumption, but also in its capacity to generate employment and commercial activity at territorial level. In that sense the distribution of auto parts and accessories stores in Mexico closely tracks the concentration of the national vehicle fleet, confirming that the sector's supply tends to locate in markets with the greatest potential demand for maintenance, repair, and component replacement. This shows that the aftermarket operates as an employment-intensive commercial network, with a significant presence both in large urban centers and in states with high logistics, productive, and everyday-mobility activity.

AUTO PARTS AND ACCESSORIES STORES

Presence in Mexico by state

Number of units, 2025



1	AGS	774
2	COL	451
3	MEXICO CITY	5,152
4	GTO	2,567
5	HGO	1,858
6	EDOMEX	7,725
7	MOR	906
8	NAY	626
9	NL	2,816
10	QRO	1,417
11	SIN	1,226
12	TLAX	822

Source: INA with INEGI data.

Nevertheless, the comparison with the vehicle-fleet map reveals some differences. Puebla replaces Baja California, and Chiapas replaces Tamaulipas, pointing to expansion opportunities in states with a large vehicle fleet but a lower density of specialized establishments.

The aftermarket's future growth will depend not only on the rising number of vehicles, but also on the sector's ability to close territorial coverage gaps, strengthen distribution channels, and professionalize the commercial offering in markets with still-underserved demand.

When analyzing the labor structure by type of establishment, it becomes clear that the aftermarket is highly concentrated in the retail sector. Nationwide, the jobs generated by retail stores exceed those of wholesale trade by more than threefold, confirming the importance of points of sale close to the final consumer: repair shops, small fleets, and individual users.

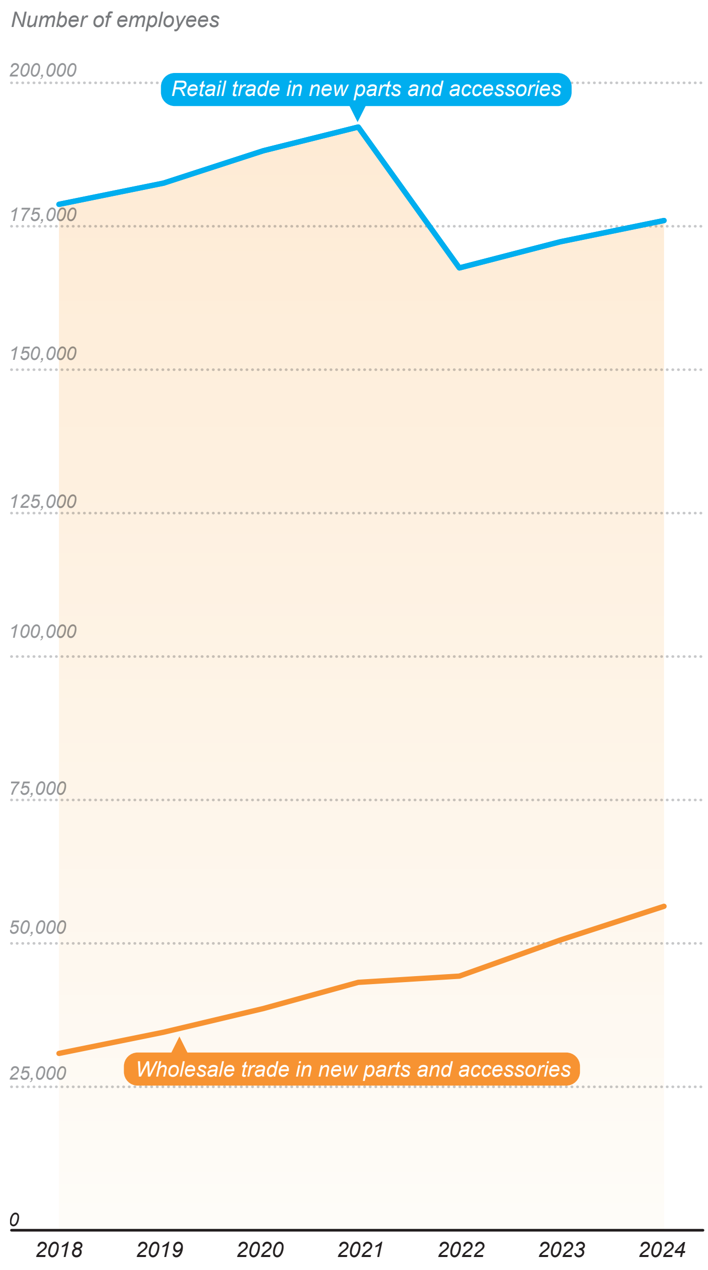
This characteristic reinforces the aftermarket's territorial role: it depends not only on large distribution centers, but on a broad network of establishments that directly serve the everyday demand for vehicle maintenance and repair.

Recent trends also reveal differing behavior. Between 2018 and 2024, retail-trade employment posted a marginal decline of 2.4%, which may be associated with operational-efficiency processes, channel digitalization, consolidation of establishments, or adjustments in the commercial structure.

By contrast, wholesale trade maintained a strong expansion path, with employment growth of 82.5% over the same period. This advance points to a strengthening of distribution, logistics, warehousing, and specialized-supply activities, increasingly relevant for serving a broad and geographically dispersed national market.

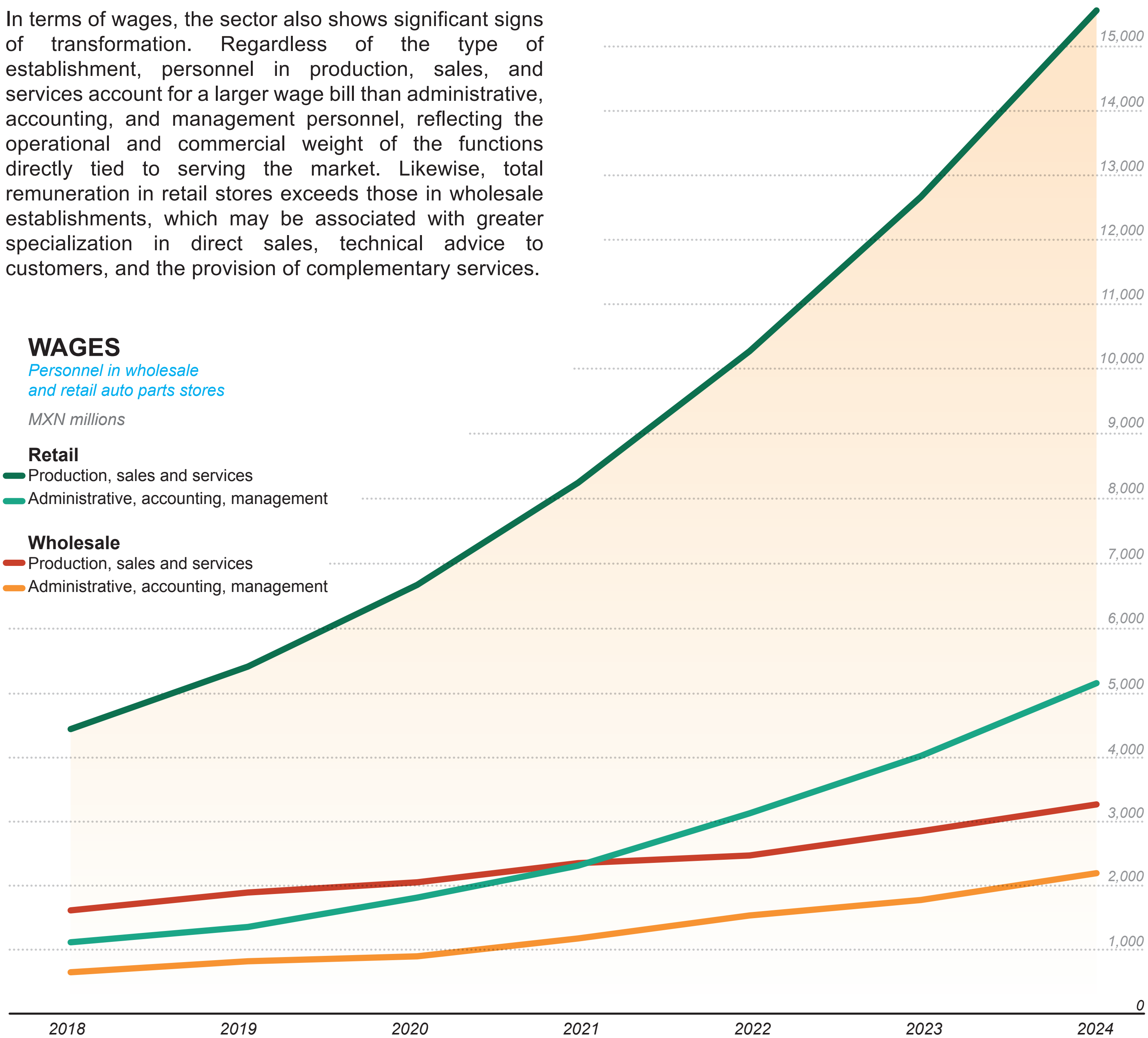
EMPLOYMENT

Wholesale and retail auto parts stores



Source: INA with INEGI data.

In terms of wages, the sector also shows significant signs of transformation. Regardless of the type of establishment, personnel in production, sales, and services account for a larger wage bill than administrative, accounting, and management personnel, reflecting the operational and commercial weight of the functions directly tied to serving the market. Likewise, total remuneration in retail stores exceeds those in wholesale establishments, which may be associated with greater specialization in direct sales, technical advice to customers, and the provision of complementary services.



Source: INA with INEGI data.

The most significant growth in the wage bill came in retail stores, particularly among administrative, accounting, and management personnel, whose income increased more than fourfold between 2018 and 2024. They were followed by production, sales, and services personnel in those same establishments, with an increase of more than threefold.

This trend points to a gradual professionalization of the retail trade in auto parts and accessories, where administrative management, commercial capability, and technical knowledge become strategic factors for competing in a market of greater scale, territorial coverage, and operational complexity.

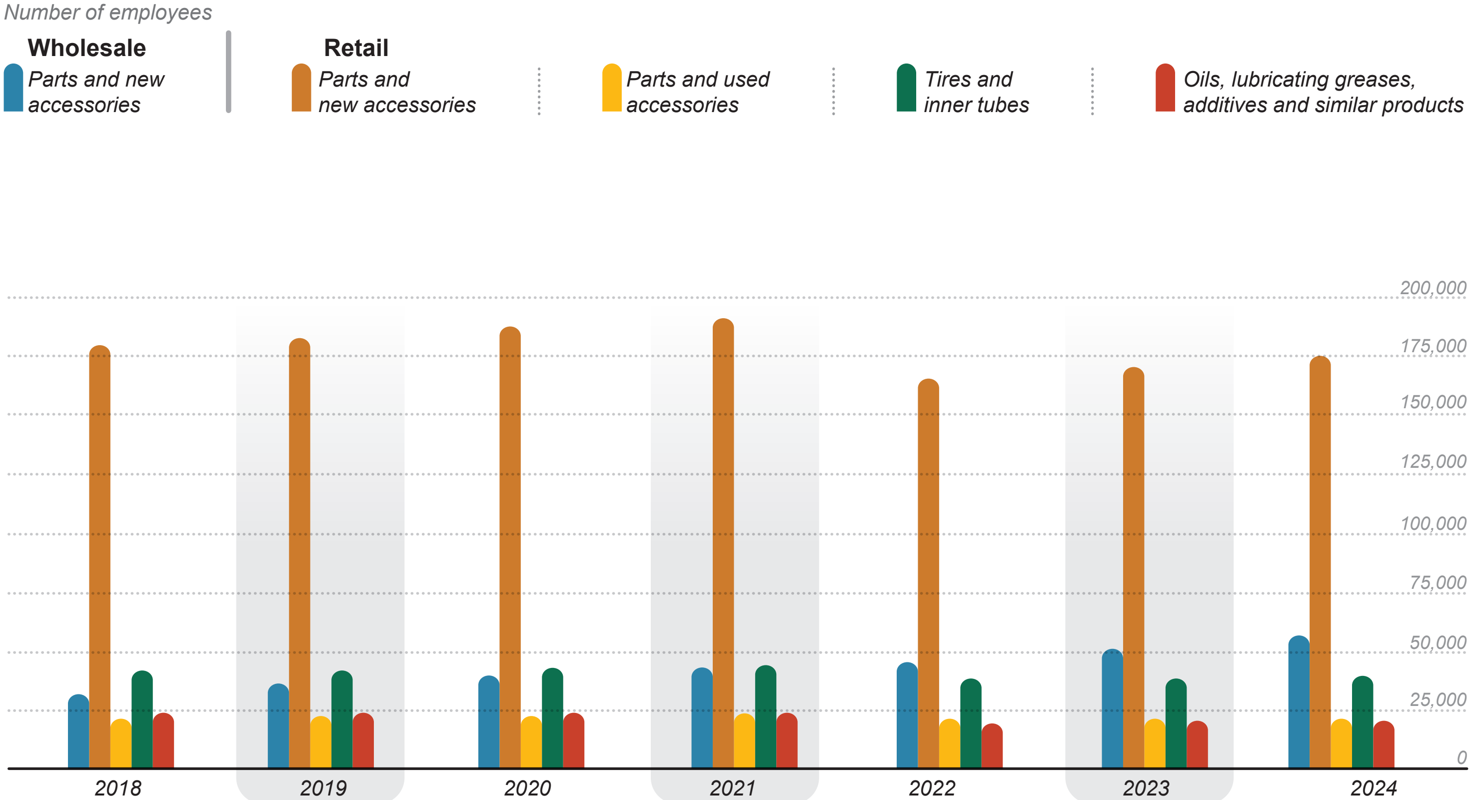
A closer look at the composition of employment by type of product traded confirms that the aftermarket is not a homogeneous market, but an ecosystem made up of activities with differing levels of labor intensity, specialization, and operational value.

Here, the retail trade in new parts and accessories leads to job creation by a wide margin, reflecting the weight of activities directly tied to the replacement, maintenance, and customization of the vehicle fleet.

EMPLOYMENT

By type of product traded

Number of employees



Source: INA with INEGI data.

For information on aftermarket services, see pages 16 and 18.

A notable change can be seen in the wholesale segment of new parts and accessories, which moved from third to second place among the activities considered, overtaking the retail trade in tires and inner tubes. This advance, together with 82.5% employment growth between 2018 and 2024, confirms the consolidation of the wholesale channel as a strategic component of the national distribution of auto parts.

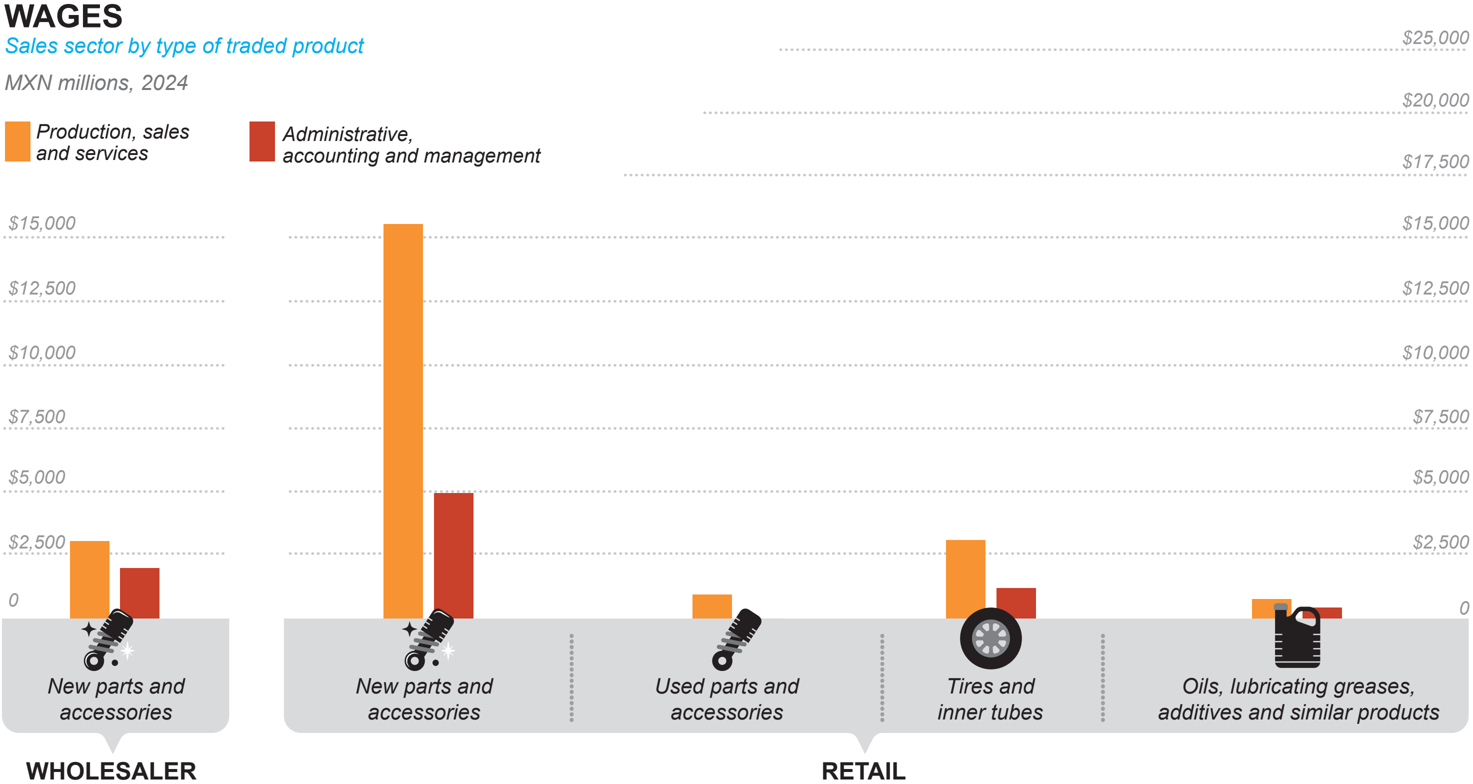
In terms of wages, the ranking by product traded follows a similar structure. The retail trade in new parts and accessories records the highest levels of total remuneration, both for production, sales, and services personnel and for administrative, accounting, and management personnel. It is followed by the wholesale trade in new parts and accessories in both labor profiles, reinforcing the economic importance of this segment within the aftermarket.

Taken together, these results present a clear picture: while retail trade concentrates most of the employment and drives the wage bill, the wholesale channel for parts and accessories emerges as one of the segments with the greatest expansion. This points to a maturation process in the Mexican aftermarket, in which direct consumer service coexists with a robust distribution infrastructure, key to sustaining territorial coverage, product availability and market efficiency

WAGES

Sales sector by type of traded product

MXN millions, 2024



Source: INA with INEGI data.

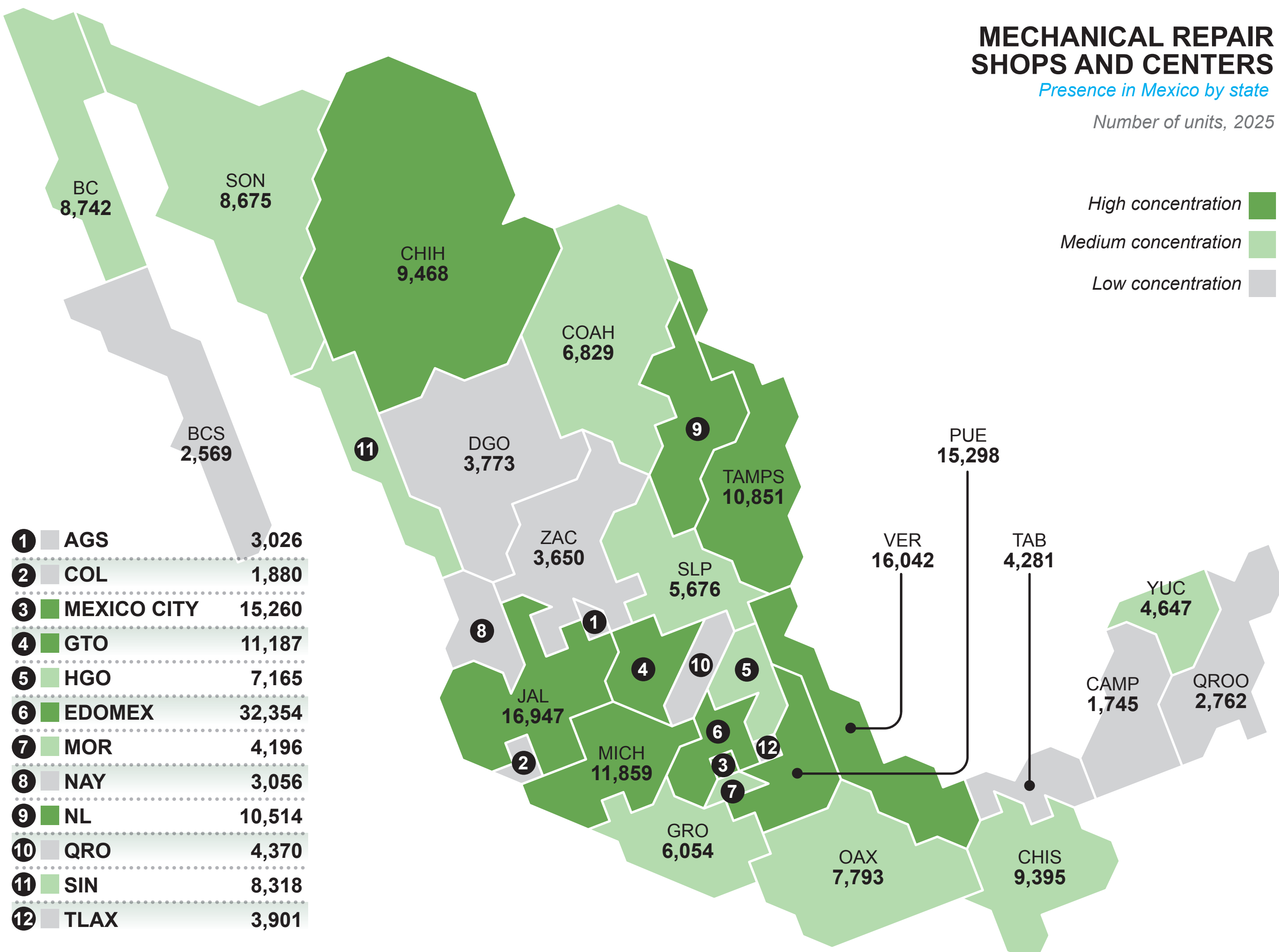
For information on aftermarket services, see pages 17 and 19

covers not only the sale of auto parts, accessories, and fuels, but also the network of establishments that sustains the repair and maintenance of the vehicle fleet. Comparing the presence of repair shops and repair establishments with the size of the vehicle fleet reveals notable differences. Mexico City stands out, ranking fifth in the number of general-repair establishments despite ranking second by vehicle fleet. Similarly, Nuevo León ranks ninth in establishments, although it ranks fifth by vehicle fleet.

MECHANICAL REPAIR SHOPS AND CENTERS

Presence in Mexico by state

Number of units, 2025



1	AGS	3,026
2	COL	1,880
3	MEXICO CITY	15,260
4	GTO	11,187
5	HGO	7,165
6	EDOMEX	32,354
7	MOR	4,196
8	NAY	3,056
9	NL	10,514
10	QRO	4,370
11	SIN	8,318
12	TLAX	3,901

Source: INA with INEGI data

These gaps suggest that the relationship between the vehicle fleet and the supply of services is not entirely proportional. Factors such as urban density, the cost of land, the formality of establishments, metropolitan mobility, and the concentration of specialized repair shops may shape the sector's territorial configuration.

Jobs linked to mechanical adjustment and repair services accounted for 351,248 positions, confirming the relevance of specialized repair shops and specialized services as an essential link in Mexico's vehicle-maintenance chain. Unlike the auto parts trade, this segment is directly associated with keeping the vehicle fleet functional, road safety, extending the useful life of the units, and even follow-up in the event of accidents.

Within this group, the general mechanical repair of automobiles leads by a wide margin, accounting for nearly two-thirds of total employment.

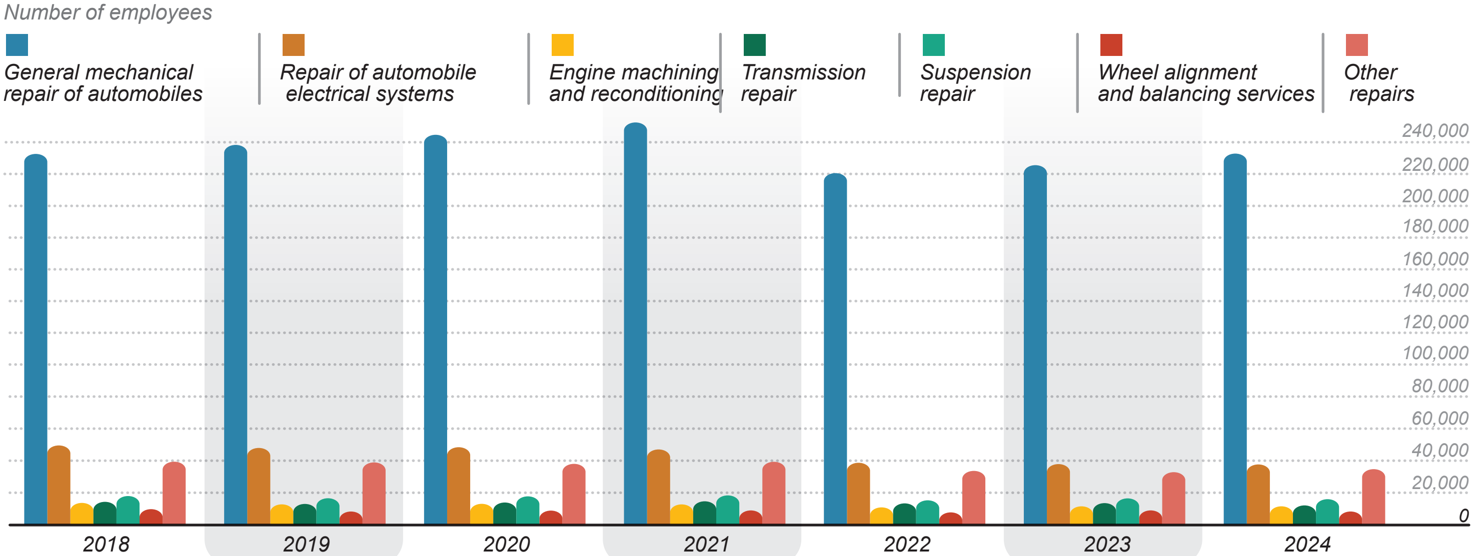
Moreover, between 2018 and 2024, this activity kept its employment level practically stable, with a marginal positive variation of 0.1%.

This behavior reveals its structural character within the aftermarket: even in periods of economic adjustment, demand for basic mechanical services remains relatively constant, since it responds to recurring needs for maintenance, repair, and the vehicle's everyday operation.
Likewise, after the adjustment seen in 2022 due to the effects of the pandemic, the sector staged a sustained recovery. Between 2022 and 2024, 14,012 additional jobs were created, equivalent to 4.2% growth. This trajectory points to a gradual normalization of demand for mechanical services and to the sector's capacity to reabsorb labor activity as use of the vehicle fleet stabilizes, mobility increases, and usual maintenance patterns recover.

EMPLOYMENT

by mechanical adjustment or repair service

Number of employees



Source: INA with INEGI data.

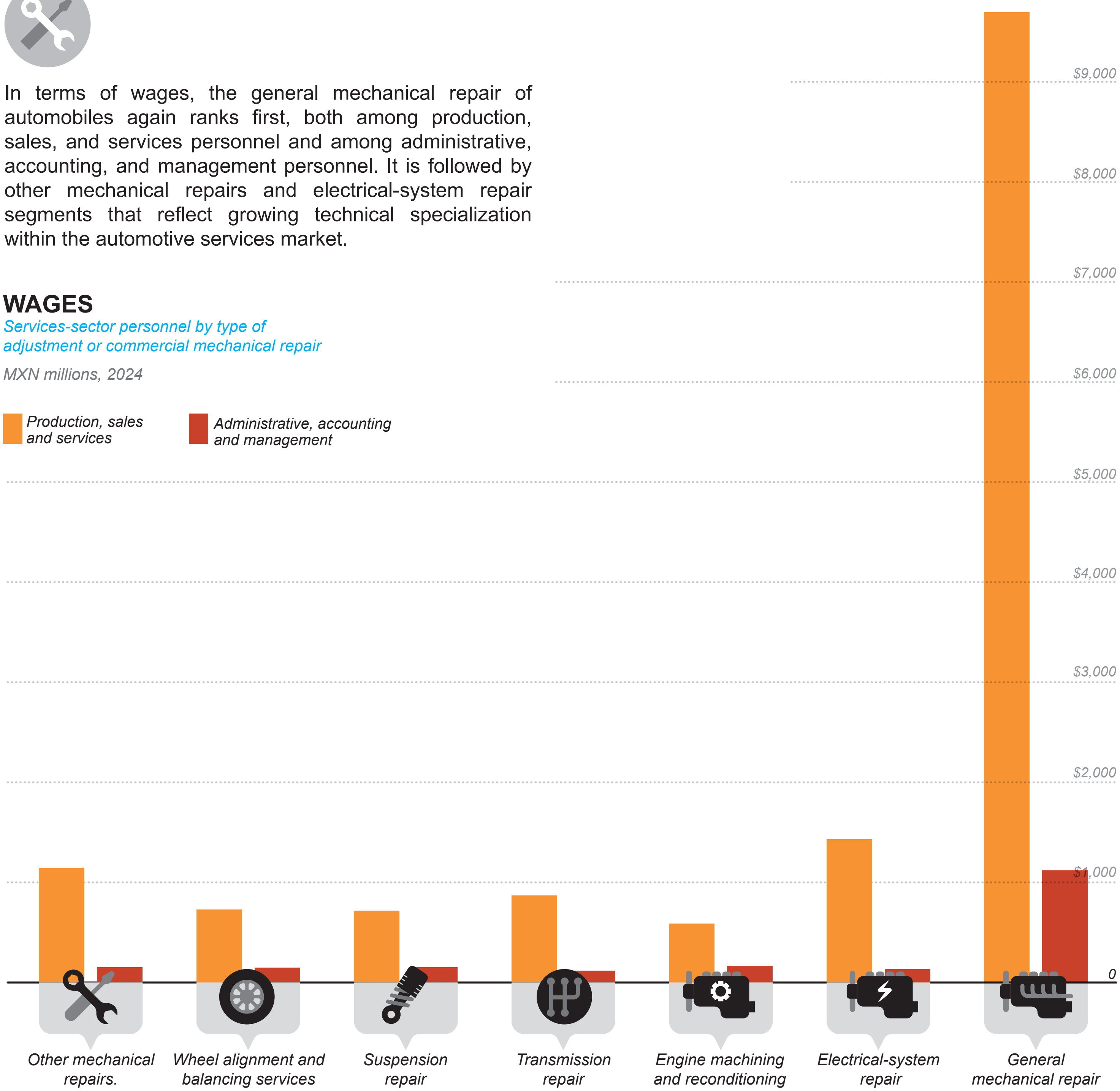
Details on employment in body and paint, upholstery and other non-mechanical repairs appear in page 18.

In terms of wages, the general mechanical repair of automobiles again ranks first, both among production, sales, and services personnel and among administrative, accounting, and management personnel. It is followed by other mechanical repairs and electrical-system repair segments that reflect growing technical specialization within the automotive services market.

WAGES

Services-sector personnel by type of adjustment or commercial mechanical repair

MXN millions, 2024



Source: INA with INEGI data

Details on employment in body and paint, upholstery and other non-mechanical repairs appear on page 18.

In the field of adjustment, cleaning, and aesthetic services or non-mechanical repair, the aftermarket shows a diversified mix that complements the traditional vehicle-maintenance offering. Within this segment, body and paint services lead job creation, closely followed by washing and lubrication activities that respond both to the vehicle's aesthetic and functional upkeep and to users' recurring care habits.

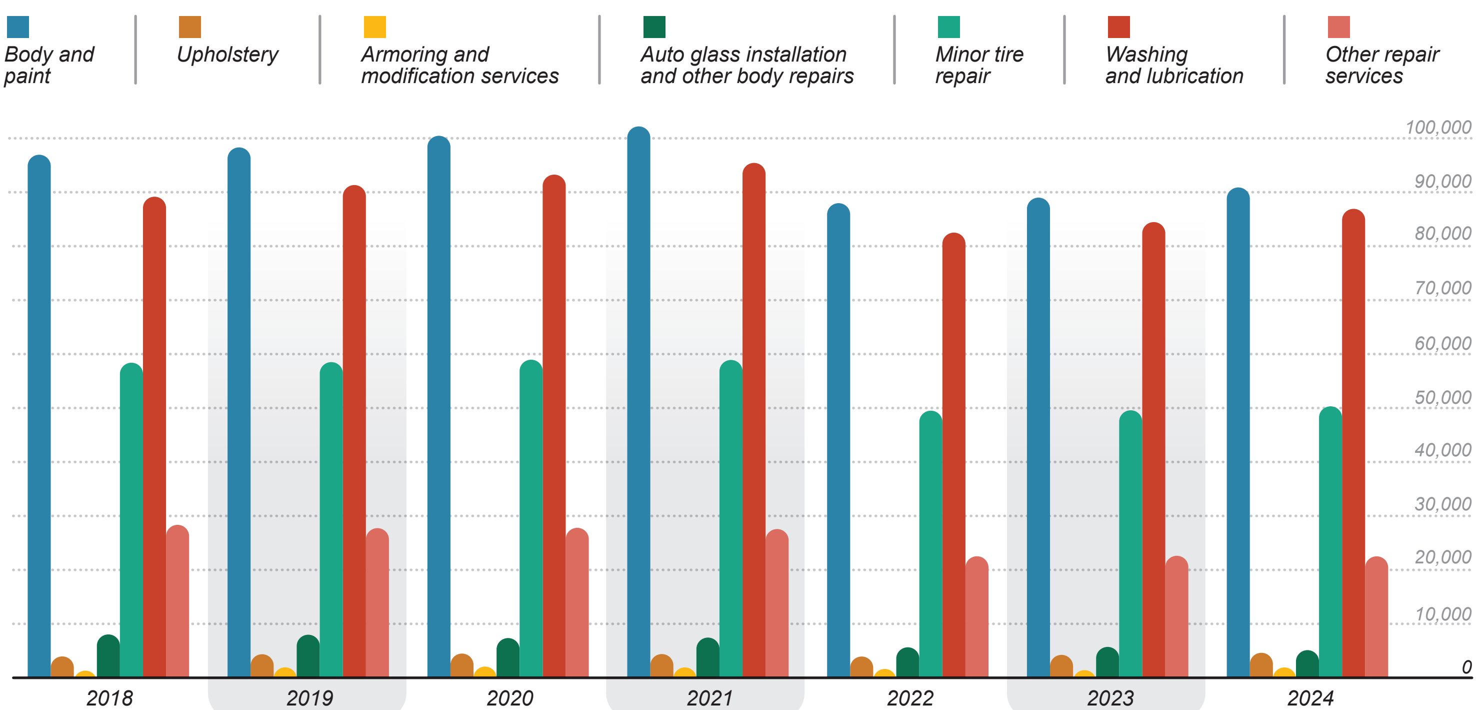
Minor tire repair also holds a relevant share, confirming the importance of quick-service work within the aftersales ecosystem. Although less technically complex than general mechanical repair, these services play an essential role in the everyday operation of the vehicle fleet, particularly amid heavy urban traffic, road wear, and intensive use of units.

Two activities with stable employment trajectories also stand out: upholstery, which grew 4.7% between 2018 and 2024, and armoring and modification services, up 3.9% over the same period. In both cases, the stability of their share of employment points to specialized niches within the aftermarket, tied not only to corrective maintenance but also to the customization, adaptation, and enhancement of vehicles.

TOTAL COMPENSATION

By adjustment, cleaning or aesthetic and non-mechanical commercial repair

Number of employees



Source: INA with INEGI data.

Details on employment in mechanical repairs appear on page 16.

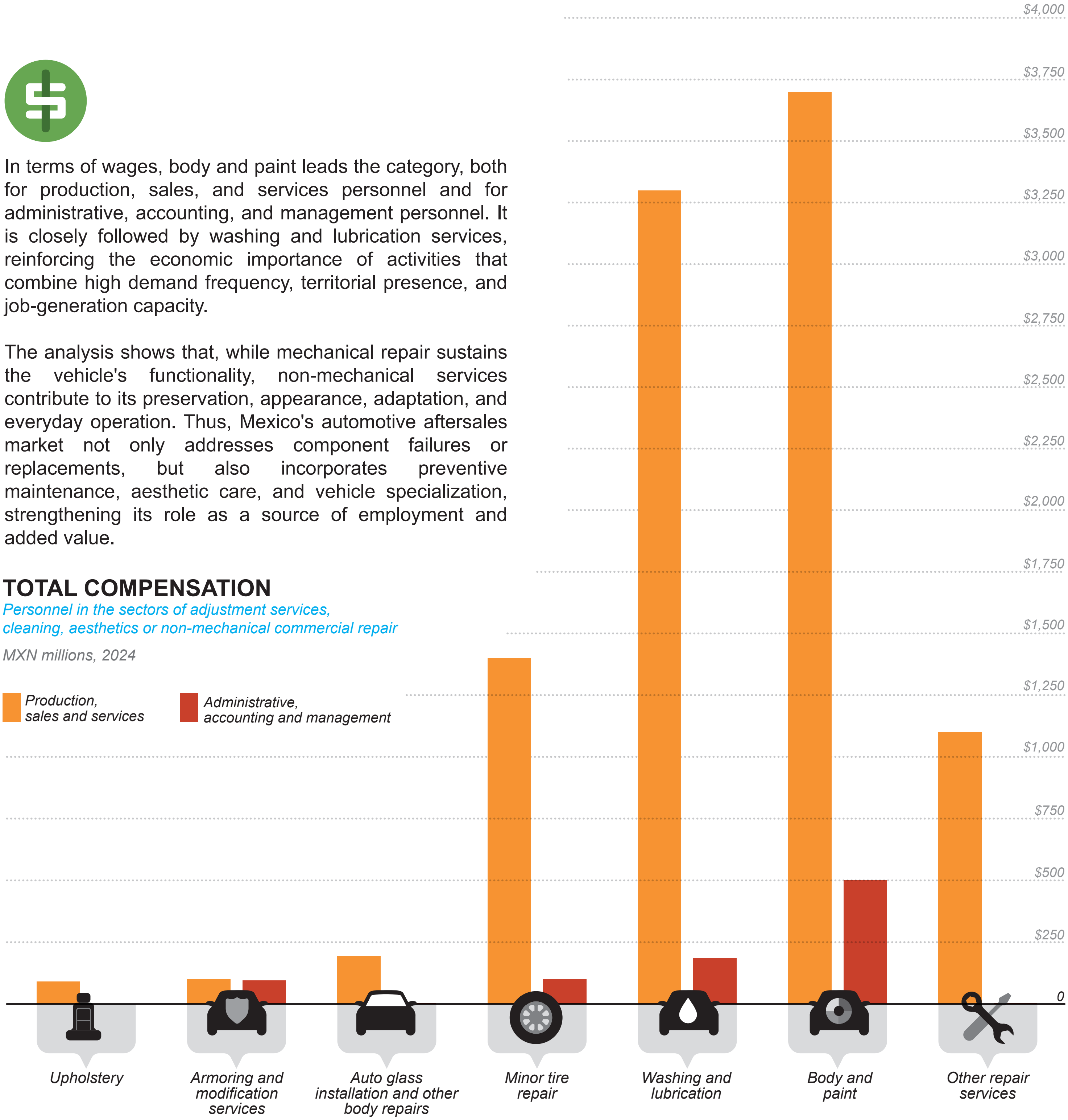
In terms of wages, body and paint leads the category, both for production, sales, and services personnel and for administrative, accounting, and management personnel. It is closely followed by washing and lubrication services, reinforcing the economic importance of activities that combine high demand frequency, territorial presence, and job-generation capacity.

The analysis shows that, while mechanical repair sustains the vehicle's functionality, non-mechanical services contribute to its preservation, appearance, adaptation, and everyday operation. Thus, Mexico's automotive aftersales market not only addresses component failures or replacements, but also incorporates preventive maintenance, aesthetic care, and vehicle specialization, strengthening its role as a source of employment and added value.

TOTAL COMPENSATION

Personnel in the sectors of adjustment services, cleaning, aesthetics or non-mechanical commercial repair

MXN millions, 2024



Source: INA with INEGI data.

Details on employment in mechanical repairs appear on page 16.

2
VALUE OF THE AFTERMARKET

The evolution of the chain's value over the past eight years allows for a deeper structural reading of the market.

The data provided by the National Institute of Statistics and Geography (INEGI) place the retail sale of gasoline and diesel among the products offered by the aftermarket. However, for the analytical purposes of this document, this product is separated from the rest of the items, in order to size more precisely the specific weight of the auto parts, accessories, maintenance and services directly associated with the upkeep of the vehicle fleet.

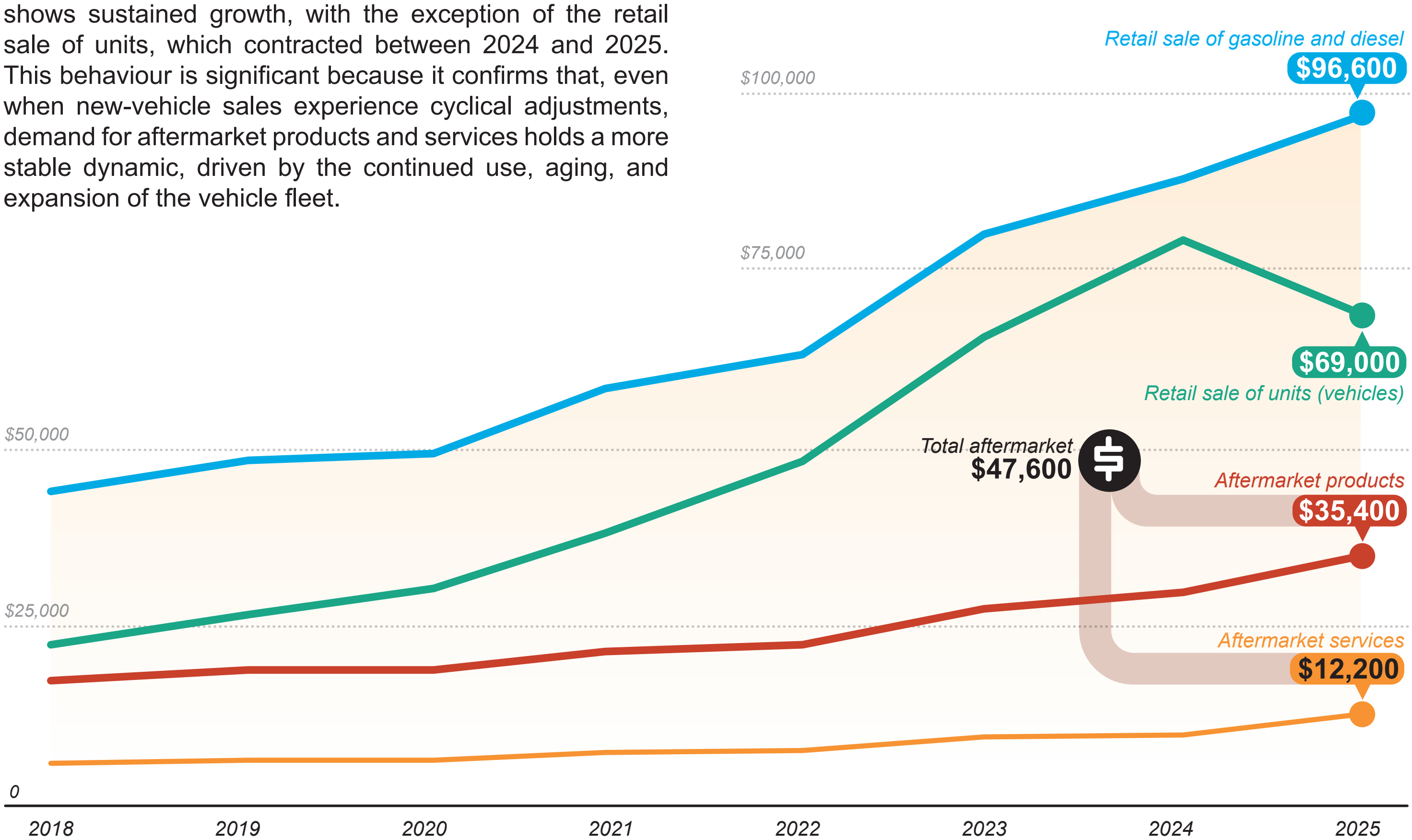
Between 2018 and 2025, every component of the chain shows sustained growth, with the exception of the retail sale of units, which contracted between 2024 and 2025. This behaviour is significant because it confirms that, even when new-vehicle sales experience cyclical adjustments, demand for aftermarket products and services holds a more stable dynamic, driven by the continued use, aging, and expansion of the vehicle fleet.

Under this classification, aftermarket services and products not linked to the sale of gasoline and diesel account for around 21% of the chain's total value, with an estimated amount of 47,600 USD millions.

MARKET VALUE

Value of aftermarket components

USD millions



Source: INA with INEGI data.

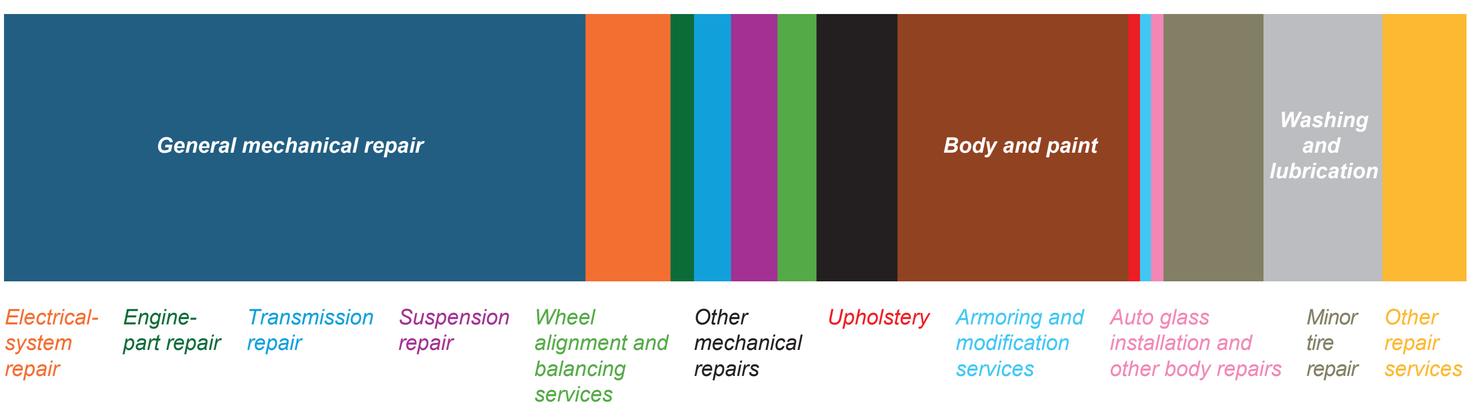
When breaking down the value chain as a whole, it becomes clear that the aftermarket and activities related to vehicle mobility constitute a market of significant economic scale. Product sales total 35,400 million dollars, driven primarily by the retail sale of new parts, which are a key component of recurring vehicle-related expenses. Added to this category are services, with an estimated value of 12,200 million dollars, among which general mechanical repairs stand out as one of the most significant operational activities within vehicle maintenance.

USD 35.4 billion

Value of product sales

USD 12.2 billion

Value of traded services



Source: INA with INEGI data.

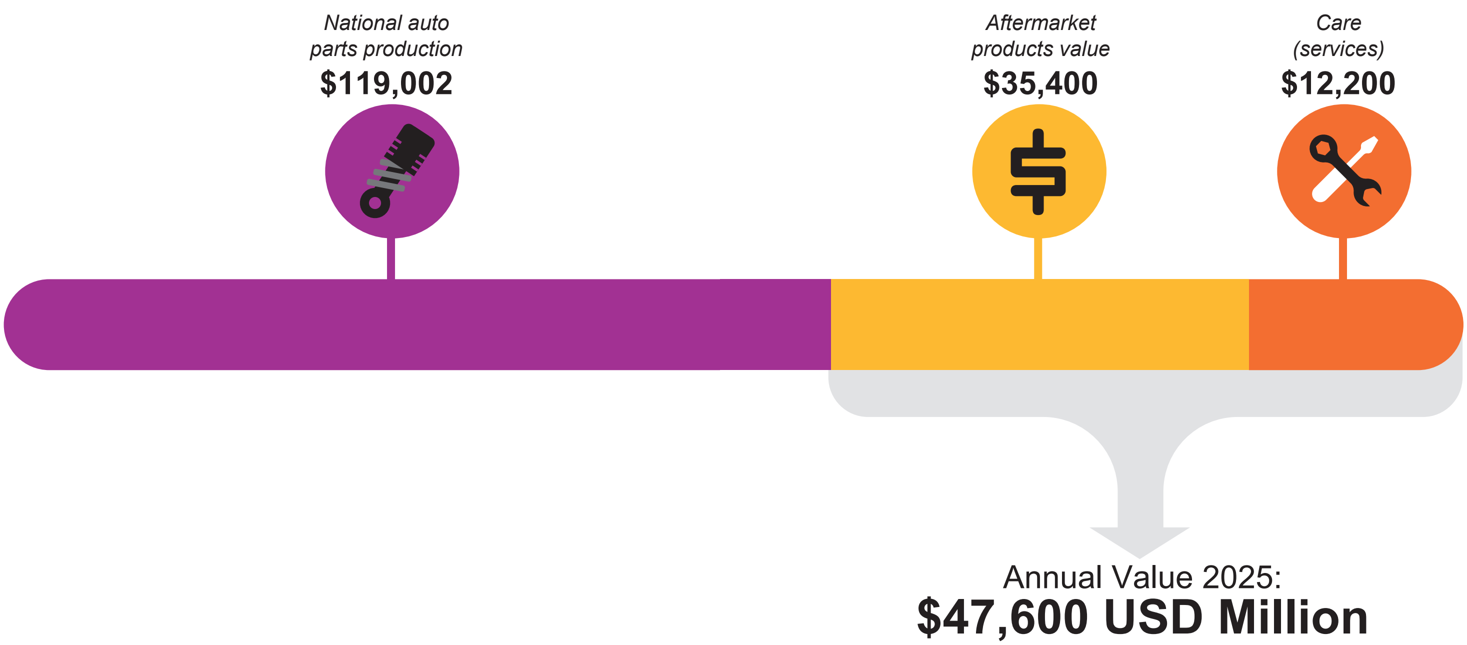
Looking at the chain as a whole, it becomes clear that auto parts production and the commercialization of aftermarket products and services are part of the same economic ecosystem. Each component performs a specific function, but all revolve around a common axis: the operation, renewal, and upkeep of the vehicle fleet.

This integrated perspective makes it possible to move beyond a fragmented view of the automotive market. Auto parts production feeds both vehicle manufacturing and the replacement market; the sale of aftermarket products ensures the availability of inputs for maintenance; and specialized services give shape to users' technical demand.

In this sense, the aftermarket should not be analyzed as an isolated segment, but as a structural piece within the vehicle's economic cycle. Its relevance lies in connecting the country's industrial capacity with the everyday demand of households, businesses, and fleets, generating value beyond the moment of the unit's production or initial sale. The Mexican automotive ecosystem thus rests on a continuous relationship among manufacturing, commercialization, use, maintenance, and vehicle renewal.

TOTAL VALUE OF THE MOBILITY CHAIN

USD millions



Source: INA with INEGI data.

CONCLUSION

The aftermarket represents an essential element of the Mexican automotive ecosystem, as it supports vehicles throughout their entire useful life and connects industrial production with everyday needs for mobility, maintenance, repair, and upkeep. Its importance lies not only in the sale of replacement parts or services, but also in its ability to sustain a broad economic network that is geographically distributed and deeply interconnected with households, businesses, repair shops, distributors, and specialized service providers. Reflecting on this sector means recognizing that a vehicle's value does not end with its manufacture or initial sale; on the contrary, it extends to every process of maintenance, diagnostics, replacement, modification, and repair that keeps the country's vehicle fleet operational. In this sense, the aftermarket has established itself as a strategic component for mobility, safety, employment, competitiveness, and the continuity of the automotive economic cycle in Mexico.

INA 65 años
Industria Nacional de Autopartes, A.C.

+52 (55) 5682 5862
www.ina.com.mx
INA Industria Nacional de Autopartes
INAOficialMx
Industria Nacional de Autopartes