

## Section 4 Automotive policies in Mexico, Thailand and India

World automobile sales volume declined in 2008 and 2009 due to sales drops in advanced economies but resumed growing in 2010. Since then, global automobile sales have remained firm, with sales in 2013 totaling more than 80 million units. Sales volume in emerging economies continued to grow even in 2008 and 2009, and have been higher than sales volume in advanced economies since 2011 (Figure II-2-4-1)<sup>225</sup>. Among emerging economies, China, (global No. 1), Brazil (No. 4) and India (No. 5) were among the top five markets in terms of automobile sales volume in 2013 (Table II-2-4-2). According to a forecast by FOURIN, an automotive research company, India is expected to become the third largest automobile market in the world in 2019, after the United States and China. ASEAN is expected to become the fourth largest market in the world in 2024 (Table II-2-4-3). The importance of emerging economies as sales markets is expected to grow further in the future.

As for global automobile production, five emerging economies were among the top 10 in 2012, reflecting their remarkable growth since 2005. Over the period, China rose from global No. 3 to No. 1 in automobile production volume, while India climbed from No. 12 to No. 6. Brazil moved up from No. 9 to No. 7, Mexico from No. 11 to No. 8 and Thailand from No. 14 to No. 10 (Table II-2-4-4).

Mexico has increased its production volume based on export growth at a time when growth in domestic sales volume remains weak compared with in other emerging economies. In 2013, Mexico was the fourth largest exporter of automobiles and related products in the world in terms of value and No. 1 among emerging economies (Table II-2-4-5).

We look at trends in automobile production volume, domestic sales volume and export volume in Mexico, Thailand and India. In India, which was the largest automobile producer among the three countries in 2013, has achieved production volume growth in line with the expansion of its domestic market<sup>226</sup>. Meanwhile, India's export volume is smaller than the other two countries' volumes. In Mexico, the second largest automobile producer among the three countries, domestic sales declined to 780,000 units in 2009. Although domestic sales surpassed 1.1 million in 2013 for the first time since 2007, the sales volume is smaller than in the other two countries. On the other hand, Mexico's export volume is the largest among the three countries and is more than double the volume of each of the other two. In Thailand, the difference between the domestic sales volume and the export volume is smaller than in the other two countries (Figure II-2-4-6; changes in production, sales and export volumes in each of the countries will be indicated in Figures II-2-4-8 to II-2-4-10, which are to be presented later).

From the above, we can see that the automotive industry is export-oriented in Mexico, domestic market-focused in India and is balanced between export and domestic sales in Thailand.

A breakdown of domestic market shares by manufacturer in Mexico, Thailand and India shows

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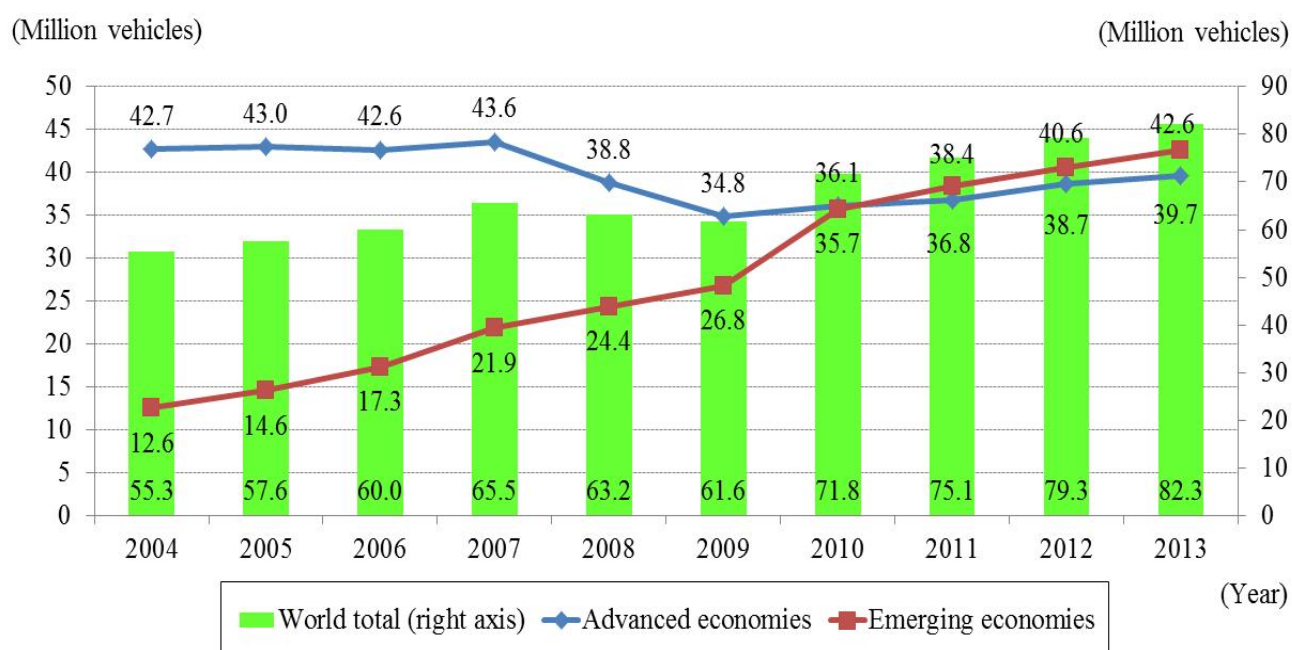
<sup>225</sup> This is the same as Figure I-1-1-14 that was presented earlier.

<sup>226</sup> Domestic sales volumes in India and Thailand in 2013 were lower than in 2012. In India, consumers continue to refrain from purchasing automobiles due to the high fuel costs and high interest rates amid the prolonged economic stagnation. In Thailand, sales volume increased steeply in 2012 due to a tax break for first-time automobile buyers, so sales fell back in reaction in 2013.

that foreign manufactures have a combined share of nearly 100% in Mexico and Thailand, while in India, local manufacturers hold a combined market share of approximately 36% (Figure II-2-4-7).

Below, we examine the characteristics of the three countries automotive policies as background factors that generated the different structures of their automotive industries.

**Figure II-2-4-1 Trends in the automobile sales volume in advanced economies and emerging economies**



Notes 1:

Major advanced economies and regions: Ireland, Israel, Italy, UK, Austria, the Netherlands, Canada, Greece, Australia, Singapore, Switzerland, Sweden, Spain, Slovakia, Slovenia, Taiwan, Czech Republic, Denmark, Germany, Japan, New Zealand, Norway, Finland, France, the U.S., Belgium, Portugal, and Luxembourg;

Major emerging economies: UAE, Argentina, Iran, India, Indonesia, Ukraine, Uzbekistan, Uruguay, Egypt, Croatia, Colombia, Saudi Arabia, Thailand, China, Chile, Turkey, Pakistan, Hungary, the Philippines, Brazil, Bulgaria, Viet Nam, Venezuela, Belarus, Poland, Malaysia, South Africa, Mexico, Romania, and Russia.

Notes 2: For some countries, calculation of figures started after 2004.

Source: MarkLines.

**Table II-2-4-2 Number of automobile sales volume worldwide (2005, 2013)**

2005			2013		
	Volume	Share (%)		Volume	Share (%)
Total	57,629,349	100.0	Total	82,279,420	100.0
1 the U.S.	17,455,520	30.3	1 China	21,984,079	26.7
2 Japan	5,841,694	10.1	2 the U.S.	15,952,523	19.4
3 China	5,758,189	10.0	3 Japan	5,370,251	6.5
4 Germany	3,547,618	6.2	4 Brazil	3,767,254	4.6
5 UK	2,825,686	4.9	5 India	3,242,301	3.9
6 Italy	2,497,519	4.3	6 Germany	3,212,518	3.9
7 France	2,497,494	4.3	7 Russia	2,777,447	3.4
8 Spain	1,798,625	3.1	8 UK	2,595,713	3.2
9 Brazil	1,704,526	3.0	9 France	2,166,273	2.6
10 Canada	1,627,774	2.8	10 Canada	1,779,860	2.2
11 India	1,439,613	2.5	11 ROK	1,539,855	1.9
12 Russia	1,298,342	2.3	12 Italy	1,389,203	1.7
13 ROK	1,173,463	2.0	13 Thailand	1,264,273	1.5
14 Mexico	1,131,768	2.0	14 Indonesia	1,196,375	1.5
15 Australia	988,269	1.7	15 Australia	1,136,227	1.4
16 Thailand	701,181	1.2	16 Mexico	1,100,757	1.3
17 South Africa	575,640	1.0	17 Argentina	943,950	1.1

Source: MarkLines.

**Table II-2-4-3 Automobile sales forecast worldwide (2019, 2024)**

2019		2024	
	Volume (thousand vehicles)		Volume (thousand vehicles)
1 China	29,495	1 China	34,055
2 the U.S.	17,500	2 the U.S.	18,500
3 India	7,000	3 India	13,000
4 Brazil	5,100	4 ASEAN	6,753
5 Japan	4,800	(of which, Indonesia)	3,400
6 ASEAN	4,795	(of which, Thailand)	1,800
(of which, Indonesia)	2,000	5 Brazil	5,300
(of which, Thailand)	1,550	6 Japan	4,700
7 Russia	3,850	7 Russia	4,500
8 Germany	3,600	8 Germany	3,600
9 UK	2,700	9 UK	2,850
9 Italy	2,700	10 France	2,800
11 France	2,530	11 Italy	2,600
12 Canada	1,740	12 Iran	2,000
13 ROK	1,570	13 Canada	1,830
14 Iran	1,500	14 Mexico	1,700
15 Mexico	1,400	14 Spain	1,700

Source: *World Automotive Statistical Yearbook 2013* (Fourin, Inc.).

**Table II-2-4-4 Automobile production volume worldwide (2005, 2012)**

2005			2012		
	Volume	Share (%)		Volume	Share (%)
Total	66,141,739	100.0	Total	82,736,295	100.0
1 the U.S.	11,946,653	18.1	1 China	19,271,808	23.3
2 Japan	10,799,659	16.3	2 the U.S.	10,332,626	12.5
3 China	5,707,688	8.6	3 Japan	9,886,368	11.9
4 Germany	5,499,060	8.3	4 Germany	5,611,269	6.8
5 ROK	3,699,350	5.6	5 ROK	4,557,738	5.5
6 France	3,549,008	5.4	6 India	4,144,529	5.0
7 Spain	2,752,467	4.2	7 Brazil	3,174,131	3.8
8 Canada	2,676,378	4.0	8 Mexico	3,022,947	3.7
9 Brazil	2,530,840	3.8	9 Canada	2,463,364	3.0
10 UK	1,803,053	2.7	10 Thailand	2,453,717	3.0
11 Mexico	1,690,878	2.6	11 Russia	2,239,545	2.7
12 India	1,631,058	2.5	12 France	1,982,273	2.4
13 Russia	1,356,633	2.1	13 Spain	1,927,517	2.3
14 Thailand	1,125,316	1.7	14 UK	1,527,146	1.8
15 Italy	1,038,352	1.6	15 Czech Republic	1,091,468	1.3

Source: MarkLines.

**Table II-2-4-5 Trends in the export value of automobiles and related products in major countries or regions**

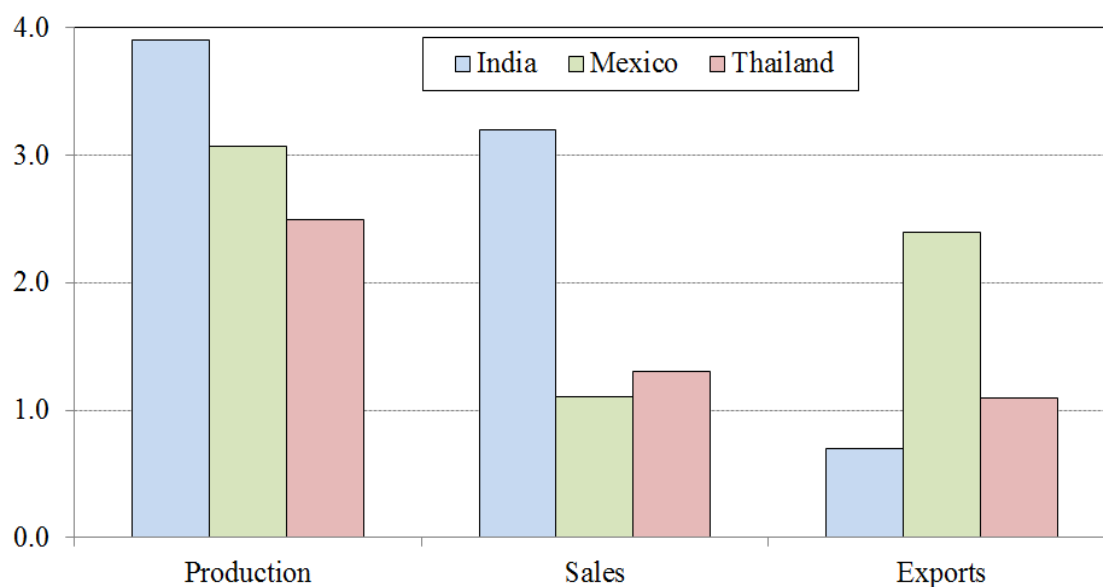
2013 ranking		Export value (billion dollars)			Comparison with previous year (%)			Share of export value in 2013 (%)
	(Year)	2011	2012	2013	2011	2013	2013	
	World	2,147.6	2,202.3	2,295.5	20.9	2.5	4.2	
1	Germany	248.7	236.8	243.9	21	-4.8	3	10.6
2	Japan	155.4	169.9	155	1.2	9.3	-8.7	6.8
3	the U.S.	118.4	131	132.9	18.5	10.7	1.4	5.8
4	Mexico	68.1	76	85.1	19.6	11.6	12	3.7
5	ROK	70.6	73.6	76.1	27.3	4.2	3.5	3.3
6	Canada	54.6	62.8	60.7	7.5	15.1	-3.5	2.6
7	UK	48.5	49.5	53.8	21.5	2	8.8	2.3
8	France	56	49	48.8	11.4	-12.4	-0.4	2.1
9	Spain	52.2	44.1	48.2	18.4	-15.5	9.4	2.1
10	China	38.7	43.6	46.4	32	12.7	6.5	2
11	Belgium	40.9	38.9	41.3	20.6	-4.9	6.2	1.8
12	Italy	35.5	32.6	35.3	17.7	-8.2	8.3	1.5
13	Czech Republic	29.7	28.8	30.5	21	-3.1	5.7	1.3
14	Thailand	19.3	25.5	26.8	-2.8	31.7	5.1	1.2
15	Poland	28.1	24.1	25.5	15.7	-14	5.8	1.1
16	Slovakia	18.3	20.3	22.5	30.4	11.1	11.1	1
17	Hungary	17.4	16.7	19	21.2	-4.2	13.7	0.8
18	Austria	19.2	17	18.5	22.4	-11.4	8.6	0.8
19	Sweden	19.5	16.7	17.1	36.2	-14.5	2.6	0.7
20	Brazil	15.3	13.9	15.1	13.6	-9.2	8.9	0.7
21	Netherlands	14.8	13.8	13.4	29.5	-6.5	-3.1	0.6
22	Romania	9.9	9.8	12.5	24	-0.2	26.9	0.5
23	India	10.2	10.5	10.8	21.7	3.4	2.6	0.5
24	Portugal	7.4	6.4	6.3	28	-13.3	-2.1	0.3
25	Taiwan	4.7	5.2	5.3	18	11.3	1.5	0.2

Notes: Total for the HS codes 8702-8704, 8706-8708, 840731-840734, 840790, 840820, 840991, 840999, and 854430.

Source: Global Trade Atlas.

**Figure II-2-4-6 Volume of automobile production, domestic sales and export in Mexico, Thailand and India in 2013**

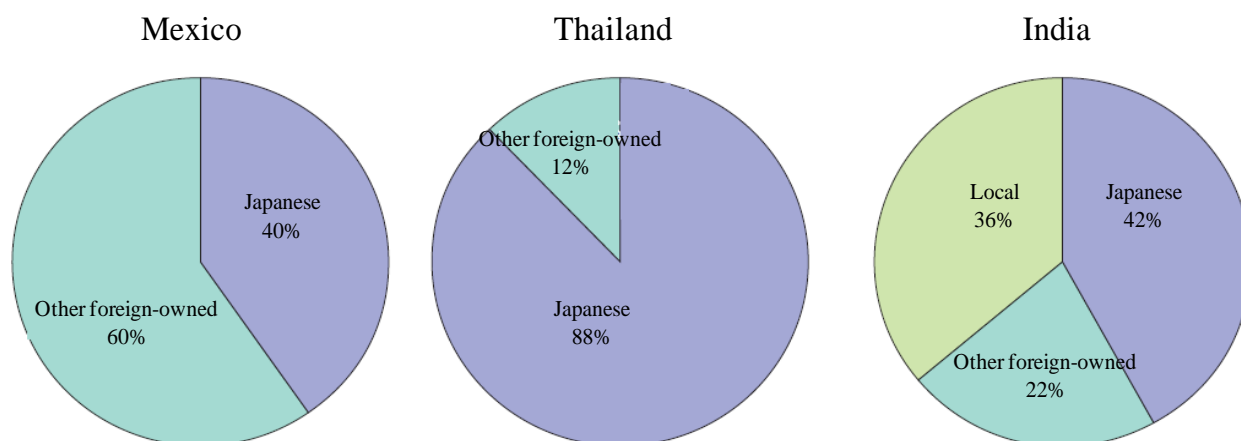
(Million vehicles)



Notes: Figures for Mexican exports are the production volume for export.

Source: Figures for production and sales are compiled from MarkLines, while those for exports are compiled from the Society of Indian Automobile Manufacturers (SIAM), the Mexican Automobile Industry Association (AMIA), the Federation of Thai Industries (FTI), and the CEIC Database.

**Figure II-2-4-7 Share of domestic sales by finished vehicle manufacturer in Mexico, Thailand, and India (classified into Japanese companies, other foreign-owned companies, and local companies. 2013)**



Notes: The share of local companies in Mexico and Thailand is less than 1% so this has been omitted.

Source: MarkLines.

## **1. External economic policy and growth**

Starting in the 1960s, Mexico adopted policy measures to protect the domestic automotive industry, such as an import substitution policy (e.g., requirement for local assembly of automobiles and local

production of parts, and restrictions on the ratio of foreign ownership of parts manufacturers). However, following its debt crisis in 1982, Mexico accepted the IMF's recommendation and acceded to GATT (which is currently the WTO) in 1986, reducing tariff rates and relaxing import restrictions. In addition, Mexico promoted reforms such as easing restrictions on foreign ownership of Mexican companies, privatization of state-owned companies and financial liberalization. By taking advantage of its proximity to the United States, a huge market, Mexico developed itself into a manufacturing and export base, and its accession to NAFTA in 1994, provided an added momentum to this move. Under these circumstances, companies from Japan, the United States and European countries advanced into Mexico, including both automakers and auto parts makers. Since then, Mexico has continued to strengthen international economic partnerships by actively participating in the establishment of a free trade network involving countries and regions around the world, including Central and South American countries, European countries and Japan (Table II-2-4-11).

Thailand also adopted policy measures to protect the domestic industry, including an import substitution policy (e.g., requirements for local assembly of automobiles and local production of auto parts, restrictions on foreign ownership of Thai companies, restrictions on the number of production models, import bans and imposition of high tariff rates) starting in the 1960s. However, in the 1990s, Thailand carried out partial liberalization, including promotion of foreign direct investments in the parts industry because of the need to expand domestic demand and to improve the technological standards and build mass production capacity in order to meet increased demand. Following the Asian currency crisis in 1997, Thailand began to strengthen exports amid the stagnation of the domestic market. In the 2000s, the trend of liberalization accelerated in line with the trade liberalization trend under the ASEAN Free Trade Area (AFTA) agreement, as exemplified by the abolition of the requirement for local production of parts<sup>227</sup>. Thailand, which started to strengthen exports ahead of other ASEAN countries, pursued the vision of becoming the “Detroit of the Orient” and actively promoted such measures as inviting foreign investments and concluding FTAs with other countries, and as a result, it has become a global production base of pickup trucks<sup>228</sup>. In recent years, Thailand has also been devoting efforts to production of small passenger cars as an initiative to strengthen the eco-friendly car sector as another strategic pillar along with pickup trucks.

India, which has had local automakers for some time, thoroughly pursued policy measures to

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<sup>227</sup> The automotive industry in Thailand and other ASEAN countries has been developing due to complementary support regarding auto parts within the ASEAN region. Automakers have engaged in automobile production on an ASEAN-wide scale by complementing major parts across national borders through the use of tariff benefits provided by the Brand-to-Brand Complementation (BBC) scheme for auto parts, which was launched in 1988, and the ASEAN Industrial Cooperation (AICO: under this scheme, preferential tariff rates of 5% or less are applied to individual companies' mutual export projects within the ASEAN region subject to approval from relevant governments) scheme, which started in 1996 as an evolution of BBC, as well as tariff reductions under the AFTA agreement (Shimizu (2010)).

<sup>228</sup> The value of exports of trucks weighing 5 tons or less (HS870421) from Thailand in 2013 was 7.5 billion dollars, making the country the largest exporter of such trucks in the world.

protect the domestic industry, such as the requirement for local production, restrictions on foreign ownership of Indian companies and import control after becoming an independent country in 1947. Foreign companies operating in India at that time were forced to withdraw from the country as they failed to adapt to the strict requirement for local production and other regulations. Consequently, Indian companies maintained an oligopoly in the Indian automotive market for a long period of time. In the 1980s, India partially relaxed the restrictions on foreign companies, as exemplified by the conclusion of a four-wheel vehicle joint venture agreement between Suzuki Motor Corporation of Japan and Maruti Udyog Limited<sup>229</sup>, an Indian state-owned company. In the 1990s, companies from Japan, the United States, European countries and ROK, advanced into India one after another. However, the requirement for local production and export-import balancing requirement continued to be imposed on foreign companies based on memorandums of understanding (MOUs) concluded with the government of India. In the 2000s, these restrictions were judged to be in violation of WTO rules<sup>230</sup>, and India revised the existing policy and accelerated the opening of its market to the outside world. Under a new automotive policy set forth in 2002, India eased the restriction on investment by foreign companies through measures such as abolishing the minimum investment requirement for foreign companies and the local content requirement and permitting full foreign ownership of Indian companies. At the same time, India, positioned production of small cars, motorcycles and auto parts as the core sectors of the Indian automotive industry and set forth a policy of promoting exports and research and development<sup>231</sup>. In 2006, India formulated the Automotive Mission Plan 2006-2016<sup>232</sup>, which set medium- and long-term numerical goals for the period through 2016. One of the goals was becoming global No. 7 in automobile production volume by 2016, and this was attained in 2009, reflecting the rapid growth of the Indian automotive industry. In 2013, India formulated the National Electric Mobility Mission Plan 2020<sup>233</sup>, under which it aims to become a production and development base of electric vehicles.

As mentioned above, there are differences between the three countries in the timing, substance and degree of opening up to the outside world, and these differences have resulted in the different structures of their respective automotive industries. Even so, all of the three countries have been increasing exports by promoting deregulation and conclusion of FTAs amid the international trend of trade and investment liberalization. They have achieved development by also accepting foreign investments and establishing strategic platforms of production, exports and sales while taking advantage of their respective characteristics including their geographic locations and the size of the domestic markets.

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<sup>229</sup> In December 2006, the government of India decided to sell all of its shareholdings, and this company was fully privatized later.

<sup>230</sup> This case was taken up in Part II, Chapter 8 of the 2013 Report on Compliance by Major Trading Trade Partners with Trade Agreements:

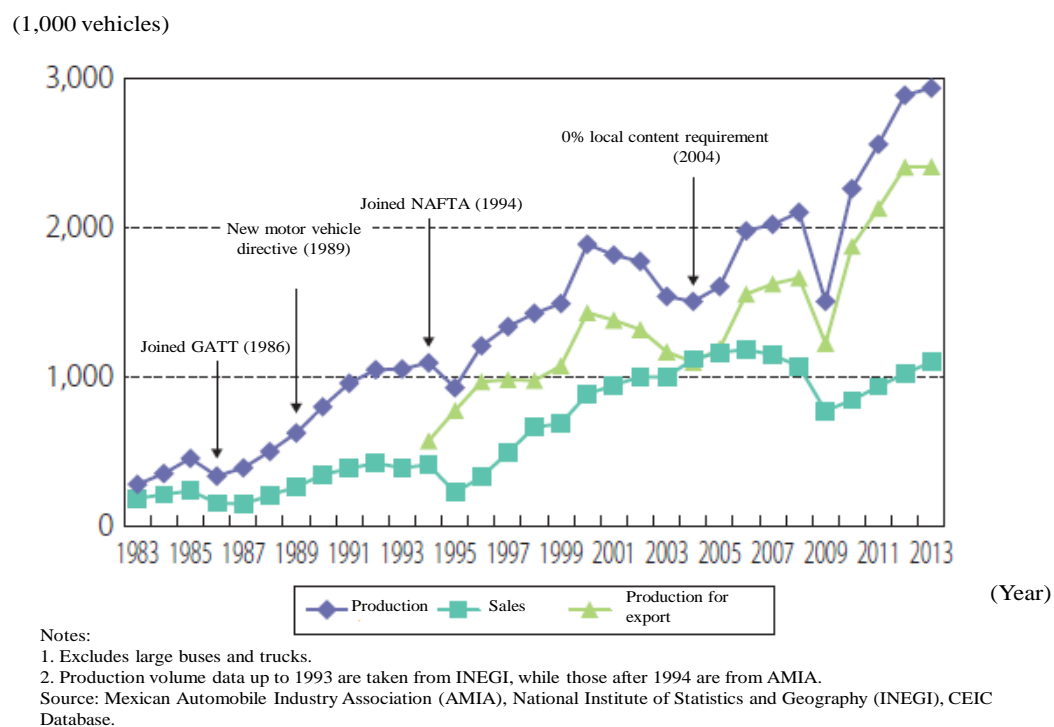
[http://www.meti.go.jp/english/report/downloadfiles/2013WTO/02\\_08.pdf](http://www.meti.go.jp/english/report/downloadfiles/2013WTO/02_08.pdf)

<sup>231</sup> Organization for Small & Medium Enterprises and Regional Innovation, JAPAN (2006)

<sup>232</sup> [http://www.dhi.nic.in/Final\\_AMP\\_Report.pdf](http://www.dhi.nic.in/Final_AMP_Report.pdf)

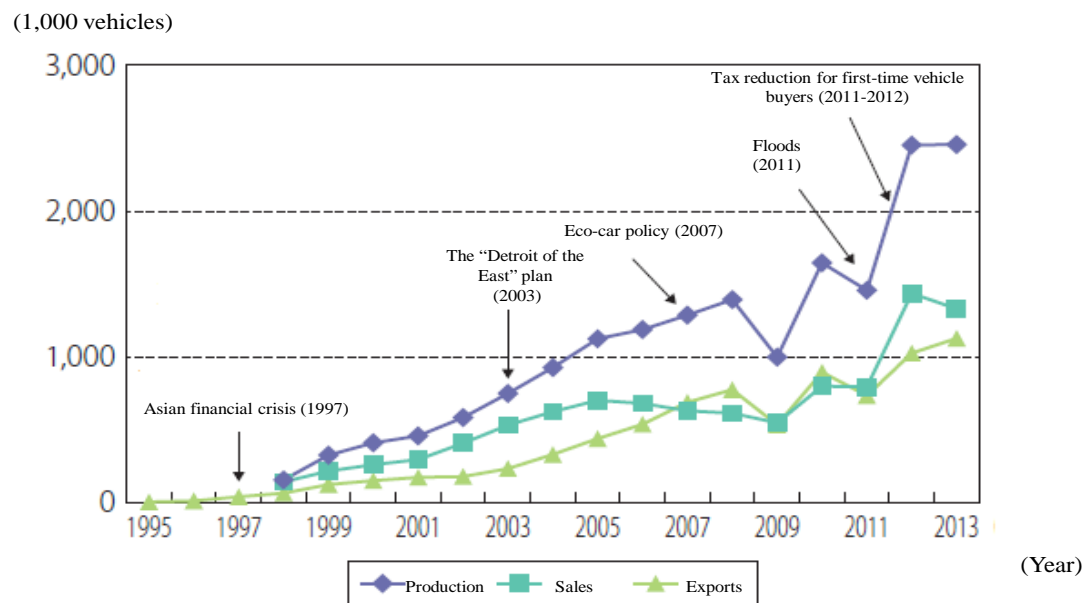
<sup>233</sup> <http://www.pib.nic.in/newsite/erelease.aspx?relid=91444>

**Figure II-2-4-8 Trends in the volume of automobile production, sales and production for export in Mexico**



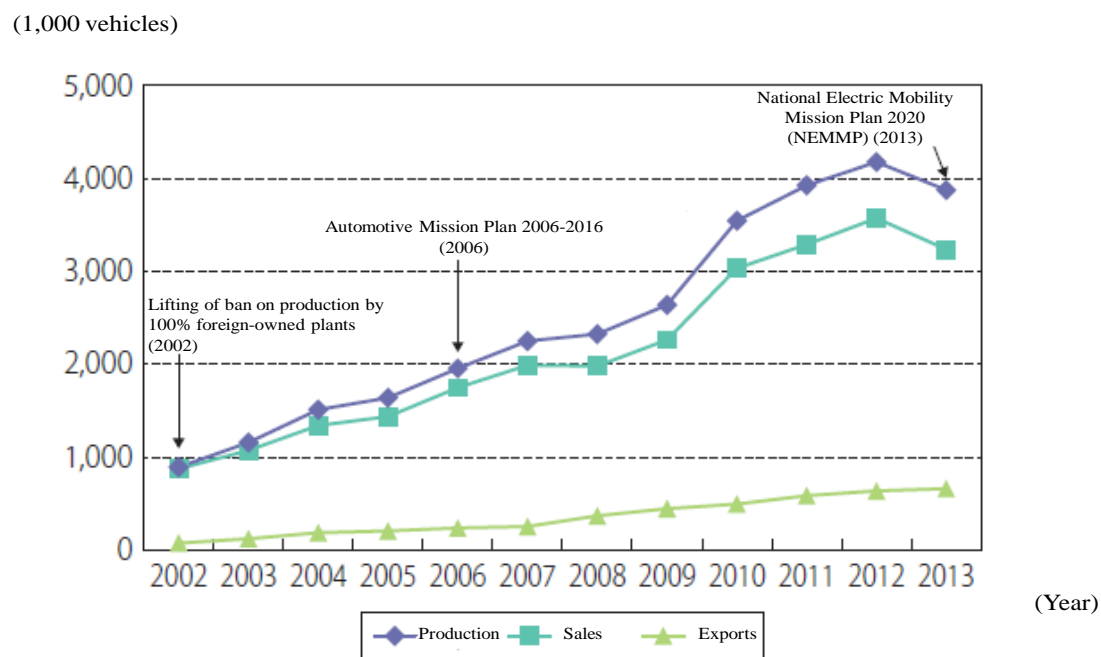
**Figure II-2-4-9 Trends in the volume of automobile production, sales and export in Thailand**





Source: Federation of Thai Industries (FTI), CEIC Database.

**Figure II-2-4-10 Trends in the volume of automobile production, sales and export in India**



Source: Society of Indian Automobile Manufacturers (SIAM), CEIC Database.

**Table II-2-4-11 EPA/FTA partners of Mexico, Thailand, and India, and year of entry into force**

Mexico	
North America	North American Free Trade Agreement (NAFTA) / 1994
Latin America	Colombia (former G3) / 1995
	Chile / 1999
	Uruguay / 2004
	Peru / 2012
	Mexico-Central America Unified FTA / 2013 * Integrates three existing agreements with five countries: Costa Rica / 1995, Nicaragua / 1998, and the three countries of the Northern Triangle (Guatemala, Honduras, and El Salvador) / 2001. As this agreement had entered into force in all of the countries concerned as of September 2013, all of the earlier individual agreements have expired.
Asia & Pacific	Japan / 2005
Europe	EU / 2000 *New member countries have been added since 2000.
	EFTA (European Free Trade Association: Norway, Switzerland, Iceland, Liechtenstein) / 2001
Other	Israel / 2000

Thailand	
Latin America	Peru / 2011
Asia & Pacific	Japan (ASEAN / 2008, bilateral / 2007)
	ASEAN / 1992 (the Common Effective Preferential Tariff (CEPT) between the original six member countries was reduced to 0% in 2010)
	China (ASEAN / 2003)
	ROK (ASEAN / 2007)
	India (ASEAN / 2010)
	Australia (ASEAN & New Zealand / 2010, bilateral / 2005)
	New Zealand (ASEAN & Australia / 2010, bilateral / 2005)

India	
Asia & Pacific	Sri Lanka / 2000
	Singapore / 2005
	SAARC (South Asian Association for Regional Cooperation) / 2006 *The SAARC member countries are India, Pakistan, Bangladesh, Sri Lanka, Nepal, Bhutan, the Maldives, and Afghanistan.
	ASEAN / 2010

	ROK / 2010
	Malaysia / 2011
	Japan / 2011

Source: *Global Trade and Investment Report* (JETRO), *Membership of the WTO and Other Agreements* (JETRO website).

## **2. Diversification of export destinations**

Mexico adopted a strategy of strengthening exports at an early period and has strived to capture export markets by participating in the establishment of a free trade network involving countries and regions around the world centered on NAFTA. Thailand and India are also making efforts to strengthen exports. Below, we take a look at changes in the trends in shares of export destinations and in parts trade with regard to Mexico, Thailand and India.

Although Mexico has concluded FTAs with countries and regions around the world, the United States' share as a destination of exports of assembled automobiles from Mexico has stayed outstandingly large, despite a drop from 88.8% in 2000 to 75.8% in 2013. Meanwhile, the shares of South American countries, including Brazil, as export destinations has recently been increasing.

As for Thailand's exports, Europe's share as an export destination fell from a high level, 39.7%, in 2000 to 3.5% in 2013. In exchange, the shares of the Asia-Pacific region and the Middle East/Africa as export destinations grew except for Australia<sup>234</sup>, whose share remained large between 2000 and 2013. In the case of India, Europe's share fell from a high level, 46.9%, in 2000 to 21.8% in 2013. During the same period the shares of Central and South America and Middle East/Africa increased, while Sri Lanka was replaced by South Africa as the largest export destination country, reflecting the diversification of export destinations (Table II-2-4-12).

Next, we look at auto parts trade regarding Mexico, Thailand and India (Figure II-2-4-13).

In the case of Mexico, the United States had an outstandingly large share of around 90% as an export destination in 2013, although the share was slightly down compared with 2000. The United States also had a large share as an import source country in 2013. However, compared with its share as an export destination, the United States' share as an import source was relatively low, 63.8%, in 2013, down sharply from 2000. Meanwhile, the shares of Japan, China and ROK increased somewhat.

Regarding Thailand, the share of the Asia-Pacific region, particularly, ASEAN countries, as an export destination expanded, while the shares of Japan and the United States declined steeply. As for imports, Japan's share as an import source remained outstandingly large, but it declined from 76.6% in 2000 to 62.8% in 2013. Instead, the shares of China and Indonesia expanded.

In the case of India, the shares of the United States and Europe as export destinations remained stable at a high level between 2000 and 2013. On the other hand, the share of the Middle East/Africa except for Turkey declined. As for imports, the shares of Europe and ASEAN countries as import

<sup>234</sup> In 2005, when the Thai-Australian FTA took effect, the value of assembled automobiles exported from Thailand to Australia increased 69% from the previous year to 1.17 billion dollars, far outpacing the 3.5% growth in Thailand's overall exports (to 5.15 billion dollars).

sources, increased. By country, Japan's share fell steeply, while the shares of ROK, Germany, China and Thailand grew (Table II-2-4-14).

**Table II-2-4-12 Value and share of exports of finished vehicles from Mexico, Thailand and India (by major country, 2000, 2013)**

Mexico		(Million dollars, %)			
2000			2013		
Top countries/regions	Value of exports	Share	Top countries/regions	Value of exports	Share
World	21,480	100.0	World	50,028	100.0
ASEAN	0	0.0	ASEAN	70	0.1
EU27	572	1.1	EU27	2,514	5.0
1 the U.S.	19,083	88.8	1 the U.S.	37,899	75.8
2 Canada	1,557	7.2	2 Canada	2,299	4.6
3 Germany	570	2.7	3 Germany	2,075	4.1
4 Other	270	1.3	4 Brazil	1,991	4.0
5			China	1,386	2.8
6			Argentina	835	1.7
7			Colombia	825	1.6
			Other	2,718	5.4

Thailand		(Million dollars, %)			
2000			2013		
Top countries/regions	Value of exports	Share	Top countries/regions	Value of exports	Share
World	1,616	100.0	World	16,977	100.0
ASEAN	128	7.9	ASEAN	3,887	22.9
EU27	642	39.7	EU27	593	3.5
1 Australia	435	26.9	1 Australia	4,075	24.0
2 Italy	109	6.7	2 Saudi Arabia	1,398	8.2
3 Belgium	95	5.9	3 Indonesia	1,361	8.0
4 Spain	75	4.6	4 Philippines	982	5.8
5 Germany	71	4.4	5 UAE	698	4.1
6 New Zealand	63	3.9	6 Malaysia	626	3.7
7 Singapore	62	3.8	7 Oman	496	2.9
8 Portugal	62	3.8	8 Japan	479	2.8
9 UK	58	3.6	9 New Zealand	454	2.7
10 Turkey	53	3.3	10 Laos	438	2.6
11 Israel	38	2.4	11 Chile	433	2.6
12 Cyprus	38	2.4	12 Peru	342	2.0
13 Chile	34	2.1	13 South Africa	270	1.6
14 Greece	28	1.7	14 Iraq	247	1.5
15 Dominican Republic	24	1.5	15 Mexico	239	1.4
16 France	23	1.4	16 Russia	229	1.3
17 Saudi Arabia	22	1.4	17 Kuwait	208	1.2
18 Sweden	21	1.3	18 Turkey	208	1.2
19 Austria	20	1.2	19 Qatar	179	1.1
20 Hungary	16	1.0	20 UK	155	0.9
Other	269	16.6	Other	3,460	20.4

India		(Million dollars, %)			
2000			2013		
Top countries/regions	Value of exports	Share	Top countries/regions	Value of exports	Share
World	243	100.0	World	5,880	100.0
ASEAN	10	4.1	ASEAN	221	3.8
EU27	114	46.9	EU27	1,279	21.8
1 Sri Lanka	33	13.6	1 South Africa	863	14.7
2 Italy	27	11.1	2 UK	647	11.0
3 UK	24	9.9	3 Mexico	385	6.5
4 Netherlands	19	7.8	4 Algeria	323	5.5
5 Spain	15	6.2	5 Sri Lanka	233	4.0
6 Turkey	13	5.3	6 Australia	205	3.5
7 Bangladesh	11	4.5	7 Chile	198	3.4
8 Portugal	8	3.3	8 Bangladesh	179	3.0
9 UAE	7	2.9	9 UAE	165	2.8
10 Indonesia	6	2.5	10 Algeria	161	2.7
11 Nepal	5	2.1	11 Netherlands	152	2.6
12 Timor-Leste	5	2.1	12 Italy	142	2.4
13 Greece	4	1.6	13 Peru	112	1.9
14 Belgium	4	1.6	14 Saudi Arabia	112	1.9
15 Argentina	4	1.6	15 Egypt	111	1.9
16 Malta	4	1.6	16 Spain	107	1.8
17 Switzerland	4	1.6	17 Germany	93	1.6
18 Sweden	4	1.6	18 Libya	90	1.5
19 Chile	3	1.2	19 Nepal	76	1.3
20 Germany	3	1.2	20 Colombia	74	1.3
Other	40	16.5	Other	1,452	24.7

Americas  
Europe  
Asia & Oceania  
Middle East & Africa

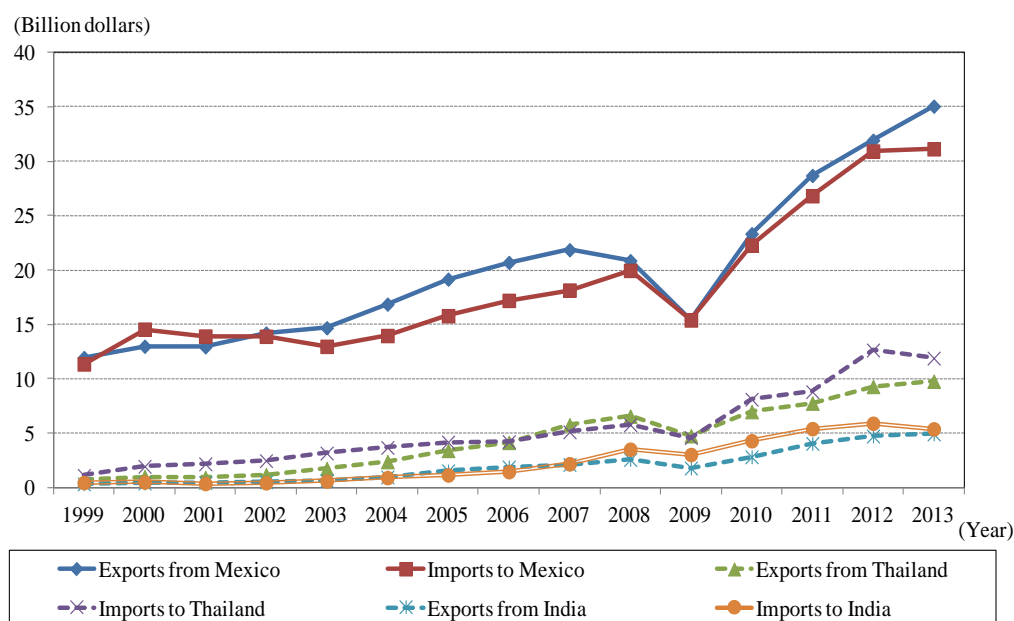
Notes:

1. Total value for HS codes 8702, 8703, and 8704.

2. Countries with a share of less than 1% have been omitted from the figures for Mexico.

Source: Global Trade Atlas.

**Figure II-2-4-13 Trends in the value of trade in automobile parts in Mexico, Thailand and India**



Notes: Total for chassis fitted with engines (HS8706), motor vehicle bodies (HS8707), motor vehicle parts (HS8708), engines and other parts mainly used for motor vehicles (HS840731-840734, 840790, 840820, 840991, 840999), and wiring harnesses (HS854430).  
Source: Global Trade Atlas.

**Table II-2-4-14 Major trading partners in the automobile parts sector in Mexico, Thailand and India (2000, 2013)**

Imports to Mexico						Exports from Mexico					
2000			2013			2000			2013		
Top countries/regions	Value of imports	Share	Top countries/regions	Value of imports	Share	Top countries/regions	Value of exports	Share	Top countries/regions	Value of exports	Share
World	14,562	100.0	World	31,144	100.0	World	12,992	100.0	World	35,059	100.0
ASEAN	5	0.0	ASEAN	239	0.8	ASEAN	5	0.0	ASEAN	133	0.4
EU27	1,767	12.1	EU27	3,720	11.9	EU27	454	3.5	EU27	877	2.5
1 the U.S.	10,949	75.2	1 the U.S.	19,856	63.8	1 the U.S.	12,077	93.0	1 the U.S.	31,346	89.4
2 Germany	1,565	10.7	2 Japan	2,108	6.8	2 Canada	289	2.2	2 Canada	1,209	3.4
3 Japan	758	5.2	3 Germany	1,740	5.6	3 Germany	268	2.1	3 Brazil	494	1.4
4 Canada	703	4.8	4 China	1,401	4.5	Other	358	2.8	Other	2,010	5.7
5 Brazil	285	2.0	5 Canada	1,105	3.5						
6 Other	302	2.1	6 Brazil	773	2.5						
			7 ROK	758	2.4						
			8 Nicaragua	518	1.7						
			9 Italy	407	1.3						
			10 Spain	402	1.3						
			Other	2,076	6.7						

## Imports to Thailand

2000			2013		
Top countries/regions	Value of imports	Share	Top countries/regions	Value of imports	Share
World	1,957	100.0	World	11,906	100.0
ASEAN	152	7.8	ASEAN	1,388	11.7
EU27	223	11.4	EU27	998	8.4
1 Japan	1,499	76.6	1 Japan	7,476	62.8
2 Germany	160	8.2	2 China	760	6.4
3 Philippines	101	5.2	3 Indonesia	675	5.7
4 the U.S.	45	2.3	4 Germany	429	3.6
5 Sweden	30	1.5	5 Philippines	421	3.5
6 Indonesia	29	1.5	6 the U.S.	305	2.6
7 Malaysia	21	1.1	7 ROK	252	2.1
8 Other	72	3.7	8 India	228	1.9
9			9 Sweden	140	1.2
#			France	138	1.2
			Other	1,082	9.1

## Exports from Thailand

(Million dollars, %)

2000			2013		
Top countries/regions	Value of exports	Share	Top countries/regions	Value of exports	Share
World	1,007	100.0	World	9,783	100.0
ASEAN	231	22.9	ASEAN	3,525	36.0
EU27	111	11.0	EU27	506	5.2
1 Japan	238	23.6	1 Indonesia	1,450	14.8
2 the U.S.	207	20.6	2 Japan	1,196	12.2
3 South Africa	91	9.0	3 Malaysia	1,153	11.8
Indonesia	82	8.1	4 South Africa	629	6.4
Malaysia	67	6.7	5 Brazil	577	5.9
India	41	4.1	6 India	573	5.9
Sweden	41	4.1	7 the U.S.	526	5.4
Belgium	39	3.9	8 Viet Nam	393	4.0
Philippines	36	3.6	9 Australia	329	3.4
Viet Nam	28	2.8	10 Taiwan	318	3.3
Taiwan	15	1.5	11 Philippines	299	3.1
Australia	10	1.0	12 Argentina	279	2.9
Other	112	11.1	13 China	212	2.2
			14 Pakistan	182	1.9
			15 UK	129	1.3
			16 Ecuador	122	1.2
			17 Egypt	121	1.2
			18 Cambodia	118	1.2
			19 Russia	98	1.0
			20 Belgium	96	1.0
			Other	1,667	17.0

## Imports to India

2000			2013		
Top countries/regions	Value of	Share	Top	Value of	Share
World	507	100.0	World	5,398	100.0
ASEAN	19	3.7	ASEAN	679	12.6
EU27	131	25.8	EU27	1,925	35.7
1 Japan	262	51.7	1 ROK	967	17.9
2 Germany	35	6.9	2 Germany	877	16.2
3 Italy	34	6.7	3 Japan	759	14.1
4 the U.S.	29	5.7	4 China	623	11.5
5 UK	28	5.5	5 Thailand	567	10.5
6 Brazil	25	4.9	6 the U.S.	208	3.9
7 ROK	21	4.1	7 Spain	189	3.5
8 France	12	2.4	8 Romania	183	3.4
9 Singapore	8	1.6	9 France	134	2.5
10 Thailand	7	1.4	10 Italy	132	2.4
11 Spain	6	1.2	11 Czech Republic	99	1.8
12 Other	40	7.9	12 Poland	79	1.5
13			13 UK	74	1.4
14			14 Sweden	66	1.2
15			15 Turkey	52	1.0
			Other	389	7.2

## Exports from India

(Million dollars, %)

2000			2013		
Top	Value of	Share	Top countries/regions	Value of	Share
World	412	100.0	World	4,934	100.0
ASEAN	21	5.1	ASEAN	476	9.6
EU27	108	26.2	EU27	1,361	27.6
1 the U.S.	102	24.8	1 the U.S.	1,065	21.6
2 UK	32	7.8	2 Turkey	406	8.2
Bangladesh	32	7.8	3 UK	299	6.1
Germany	30	7.3	4 Germany	292	5.9
Sri Lanka	22	5.3	5 Italy	243	4.9
UAE	15	3.6	6 Thailand	234	4.7
Italy	14	3.4	7 Brazil	234	4.7
Algeria	10	2.4	8 Japan	161	3.3
Egypt	9	2.2	9 Indonesia	137	2.8
South Africa	9	2.2	10 Egypt	134	2.7
Mexico	7	1.7	11 Mexico	133	2.7
France	7	1.7	12 China	127	2.6
Belgium	7	1.7	13 France	120	2.4
Turkey	6	1.5	14 UAE	103	2.1
Japan	6	1.5	15 South Africa	74	1.5
Malaysia	6	1.5	16 Bangladesh	72	1.5
Australia	6	1.5	17 Belgium	71	1.4
Singapore	6	1.5	18 Russia	69	1.4
Spain	5	1.2	19 Nepal	57	1.2
20 ROK	5	1.2	20 Malaysia	54	1.1
Other	76	18.4	Other	849	17.2

Americas
Europe
Asia & Oceania
Middle East & Africa

## Notes:

1. Total for chassis fitted with engines (HS8706), motor vehicle bodies (HS8707), motor vehicle parts (HS8708), engines and other parts mainly used for motor vehicles (HS840731-840734, 840790, 840820, 840991, 840999), and wiring harnesses (HS854430).

2. Lists only countries with a share of at least 1% (only as far as the top 20 countries).

Source: Global Trade Atlas.