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Economic Partnership Agreement メキシコ日本経済連携協定

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マツダ、ホンダ、日産がメキシコに 新工場建設へ

メキシコは自動車生産国として、また、主要な自動車輸出国としても成長を続け、米国、欧州、南米や日本などの高い品質基準を要求する市場向けにも輸出を行っています。2011年に256万台を生産した同国は、今日では世界第5位の生産国であり、小型自動車のグローバル生産国として第8位にランクされています。メキシコの持つ競争優位性には、数十年にわたる自動車の生産と輸出の実績、自由貿易協定による主要マーケットへの優先的アクセス、物流網、有能な労働力や競争力のある生産コストがあげられます。こうした要因により、日本の自動車メーカーによるメキシコへの生産拠点の移転が加速しています。

2011年6月、マツダはグアナフアト州サラマンカ市に5億ドルを投資して、新しい製造拠点を建設すると発表しました。このメキシコにおける事業は住友商事との合併で行い、2013年後期に製造を開始、年間14万台の生産を目指します。新工場ではメキシコ国内市場並びにブラジル及び米国市場向けとして、マツダ2（日本名：デミオ）とマツダ3（同アクセラ）のサブコンパクトモデルを製造します。

Leading car manufacturing countries in 2011			
Ranking	Country	Units produced (millions)	Change (%) compared with 2010
1	China	18.42	0.8%
2	USA	8.65	11.5%
3	Japan	8.40	-12.8%
4	Germany	6.31	6.9%
5	South Korea	4.66	9.0%
6	India	3.94	10.7%
7	Brazil	3.41	0.7%
8	Mexico	2.68*	14.4%
9	Spain	2.35	-1.4%
10	France	2.29	2.9%

Source: The International Organization of Motor Vehicle Manufacturers (OICA)
 *According to the Mexican Automotive Industry Association, 2011 production was 2.56 million units

2011年8月、ホンダもまたグアナフアト州セラヤ市に8億ドルを投じて、メキシコにおける同社2番目となる工場を建設し、低燃費のサブコンパクトカーを製造して北米市場の需要に対応すると発表しました。新工場は年20万台の生産能力を有し、2014年に操業を開始します。同社の既存工場はハリスコ州のエルサルトル市に位置し、CRVを生産しています。

さらに、2012年1月には、日産が20億ドルを投資してメキシコに第3工場を建設すると正式に発表しました。新工場の立地先はアグアスカリエンテスで、年間17万5千台を製造します。同社は2011年には60万台超の自動車を組立て、そのうち三分の二を輸出しており、生産規模においてメキシコ最

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Mazda, Honda and Nissan to build new production plants in Mexico

Mexico continues to grow as a vehicle manufacturer and as a leading exporter of cars to highly demanding markets such as the United States, Europe, South America and Japan. With 2.56 million vehicles produced in 2011, Mexico is today the world's fifth largest exporter and ranks eighth as global manufacturer of light vehicles. The country's competitive advantages include its decades-long history of car production and exports, preferential access to key markets through its free trade agreements, logistics, qualified labor, and competitive production costs. These factors are prompting Japanese automakers to accelerate the migration of production to Mexico.

In June 2011, Mazda Motor announced a US\$ 500 million initial investment in a new production facility in the city of Salamanca, State of Guanajuato. The Japanese auto maker, which established an alliance with Sumitomo Corporation for its Mexican venture, is to begin vehicle production in late 2013, with an annual output of 140,000 units. The new plant will produce the Mazda 2 and Mazda 3 subcompact models destined for the domestic market, but also to Brazil and the United States.



Mazda's new manufacturing plant project in Salamanca, Guanajuato (Central Mexico)

In August 2011, Honda also announced that it will set up its second manufacturing plant in Mexico for fuel-efficient subcompact vehicles production in Celaya, State of Guanajuato with an investment of US\$ 800 million to cover demand for markets in North America. The new manufacturing plant will start operations in 2014 with a production capacity of 200,000 units per year. Honda already has a plant in El Salto, Jalisco, which produces the CRV model.

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大のメーカーです。

メキシコの自動車分野の急成長は輸出面にも反映され、特に北米市場では、昨年販売された乗用車の8台のうち1台は、同国で生産する日本メーカーを含むメキシコの自動車メーカーから輸入されています。また、南米と欧州は自由貿易協定の交渉により特惠関税を得て輸出が促進されているため、メキシコ製自動車にとって有力な成長市場となっています。

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Moreover, in January 2012, Nissan made official the construction of its third Mexican plant with an investment of US\$ 2 billion. The new facility will be located in Aguascalientes, and it will produce over 175,000 units per year. The Japanese automaker is the largest in Mexico in terms of production volume with more than 600,000 vehicle assembled, exporting two-thirds of them in 2011.

Mexico's rapid growth of its automotive sector is also reflected in its export penetration, particularly in the North American market, where one in every eight vehicles sold there last year were imported from Mexican car manufacturers, including those from Japanese automakers producing in Mexico. Moreover, South America and Europe are also growing markets for Mexican-made cars whose exports are facilitated by tariff preferences negotiated through free trade agreements.

Current Japanese OEMs in Mexico				
Company	Plant location	2010 Production (in units)	2011 Production (in units)	2014 Projected production capacity (in units)
Nissan	●Aguascalientes (I, II*) ●Morelos	506,494	607,087	825,000
Honda	●Jalisco ●Guanajuato*	55,001	45,390	255,000
Toyota	●Baja California	54,278	49,596	55,000
Mazda	●Guanajuato*	-	-	140,000
Total production		615,773	702,073	1,275,000

Sources: Mexican Association of Automobile Manufacturers (AMIA) and companies' press releases

*New plants to start operations in 2013 and 2014

Japanese auto parts companies continue to migrate to Mexico

The announcements of new car assembly plants in Mexico are being followed by the installation of 22 new Japanese auto parts makers in the country from August 2011 to March 2012, with investments surpassing US\$ 760 million. Such investment trends will continue and it is estimated that by 2015 the number of new auto parts firms in Mexico could grow to 50 or more as assemblers expand vehicle production in the country.

Mexico's automotive clusters represent an opportunity for Japanese firms to diversify production and become more competitive by producing with lower costs and avoiding the risk of yen-based revenues from exports of production bases in Japan. Moreover, Mexico is attracting auto parts manufacturers as the country maintains its leading position as the main supplier of auto parts to the U.S. market, above Germany, Japan and Canada. In 2011, Mexico's exports of auto parts to the United States reached US\$ 65 billion, a growth of the 8.3% from the previous year.

* Revenues from exports have fallen 30% since 2008, as the yen has strengthened vis-à-vis the US dollar, the Euro and other major currencies.

日本の自動車部品会社、メキシコへの移管継続

メキシコにおける新規組立工場設立の発表に続き、2012年3月までに22の日系自動車部品会社が同国への新規参入を発表し、その投資額は合計で7億6千万ドルを超えました。この投資の傾向は今後も続くと考えられ、メーカーが生産を拡大する2015年には、メキシコに新規参入する自動車部品会社の数は50社以上に増えると予想されます。

メキシコの自動車産業クラスターにより、日系企業は生産拠点を分散化する機会を得、また低コストでの生産の実現によって競争力を一層高めることが出来ます。また、日本を生産拠点として輸出を行った場合に発生する、日本円をベースとした収益リスクに晒されることもなくなります*。さらに、ドイツ、日本、カナダの次にアメリカ市場の主要なサプライヤーとしての牽引的な地位を確立しているメキシコは、アメリカの顧客へ供給している自動車部品会社から注目されています。同国は2011年にはメキシコのアメリカ向け自動車部品の輸出で650億ドルに達し、前年度比で8.3%の成長を遂げました。

*アメリカドル、ユーロ、その他主要な通貨に対して円高となったため、2008年より輸出収入は30%減少しました。

Key aspects considered by Japanese auto parts firms in Mexico	
Location	<ul style="list-style-type: none"> • Proximity to clients, including OEMs • Land conditions and infrastructure • Industrial parks
Logistics	<ul style="list-style-type: none"> • Infrastructure conditions • Roads and railroads, access to ports • Customs clearance and border trade facilitation
Production costs	<ul style="list-style-type: none"> • Manufacturing costs • Taxes • Transportation costs
Human resources	<ul style="list-style-type: none"> • Experienced managers, preferably with knowledge of Japanese business culture and language. • Labor quality, education level and training • Japanese communities and schools in the region
Regulations & trade facilitation	<ul style="list-style-type: none"> • Legal, fiscal and labor laws • Federal and local incentives • Customs facilitation • Preferential import programs
Incentives and local government support	<ul style="list-style-type: none"> • State and local government incentives • Information sources at local level • Facilities and services • Direct support for business operations and start-up • Support for R&D programs

メキシコの自動車産業支援プログラム	
プログラム名	内容
自動車法令	外国の生産者に対して、税額控除、貸付、補助金等のインセンティブを付与。本法令の恩恵を受けるには、生産者は現地調達率、生産量、最低投資額の基準を満たさなければいけない。
IMMEX	製造工程やサービスに使用され、加工後は輸出される部品に対して一時的な輸入を免税とする。内容は、 ・輸入品に対する付加価値税（VAT）の控除（従価税率） ・補償金支払い免除 ・国内での購入品に対して付加価値税の支払い義務なし
PROSEC	・製造工程で使用され、国内で販売、または輸出される部品の輸入には特惠関税の税率を適用。 ・完成品のカテゴリーまたは製造会社のステータスに基づいて、輸入材料や機器へ適用される税率の大部分を0-5%とする。 ・国内で生産される部品が特定されることにより、現地サプライヤーの発展を促進
メキシコ経済省/プロメヒコ基金	経済発展をもたらすプロジェクトに対しインセンティブとして税額控除と補助金の付与
中小企業支援基金	ティア2と3の部品サプライヤーの発展と強化を促進
窓口一本化	単一または統合された電子窓口を通して、メキシコにおける海外貿易の手続きを簡易化するためのツール

Mexico's automotive sector support programs	
Program	Description
Automotive Decree	Provides incentives to foreign manufacturers including tax exemptions, credit and grants. Manufacturers must comply with local content requirements, volume of production, and minimum investment amounts to benefit from the Decree.
IMMEX	Allows temporary duty-free imports of parts for an industrial process or service to be exported after its transformation process. Benefits: • Exemption of Value Added Tax (VAT) on imports (ad valorem tariff-rate) • Exemption of compensation fees • No VAT on domestic purchases
PROSEC	• Allows imports of parts under preferential tariff rates, used in manufacturing certain goods which are sold in the domestic or export markets. • Establishes most tariffs between 0% and 5% for imported inputs and machinery, based on final goods and producing firms. • Promotes the development of local suppliers by defining which parts should be produced domestically
Ministry of Economy / ProMexico Fund	Provides tax exemptions and grants as incentives to projects generating economic development
SME Fund	Fosters development and consolidation of Tier 2 and 3 parts suppliers.
Simplified Window	A tool that simplifies all foreign trade procedures in Mexico through a single or unified electronic window.

Opportunities for local procurement

- Materials and components for auto parts manufacturing in accordance to Japanese car makers' specifications
- Outsourcing of parts by local manufacturers
- Contracts offered to construction firms for the new plants and facilities (subcontracting)
- Human resources, legal, fiscal, customs, marketing, trade facilitation and other related services
- Logistics and transportation

Recent announcements by Japanese auto parts makers in Mexico

From August 2011 to March 2012

Date	Company	Description	Location (State)	Investment amount (US\$ million)
August 2011	Jatco	Expansion of its production capacity for CVT transmissions	Aguascalientes	\$ 12.5
	Mitsui & Co. (2 nd phase)	Flat-rolled steel processing facility (joint venture with Nucor)	Nuevo Leon	\$ 12.5
	Koide Kokan	New manufacturing plant for precision steel tubes	Zacatecas	\$ 15
September	Alpha	Plant to produce automobile door handles, assembly and other processes	Jalisco	\$ 40
	Omron Automotive	Plant for electronic and electromechanical components	Guanajuato	\$30
	Daido Metal	Manufacturing plant for automobile bearings	Jalisco	\$ 30*
October	Mitsui & Co.	Flat-rolled steel processing facility (joint venture with Nucor)	Guanajuato	N/A
November	Ashimori Industry	Manufacturing plant for seatbelts, air bags and interior design products.	Guanajuato	N/A
December	Nishikawa Rubber	Plant for manufacturing and processing rubber products	Guanajuato	N/A
	Topre	Manufacturing plant to produce press parts.	Queretaro	\$ 52
	Kamiita Sosei	Expansion of its production plant	Baja California	\$ 3.9
	G-TEKT/H-ONE	Manufacturing of precision instruments	Guanajuato	\$ 46
2012 January	Tigers Polymer	Plant to produce hoses, sheets and high precision plastic molding parts	Guanajuato	\$ 13
	Denso	Plant to produce heating systems, ventilation and air conditioning (HVAC) units	Guanajuato	\$ 57
	Mitsui Chemical	Plant expansion to produce resins, solvents, polymers and engineering plastics	Aguascalientes	N/A
	Yachiyo	Manufacturing plant to produce fuel tanks, sheet-metal and plastic parts	Guanajuato	\$ 13
	Nifco	New plant for auto parts production	Guanajuato	\$ 12.5
	Maruichi Steel Tube	Steel tube production	Aguascalientes	\$ 10
	Kehin	Manufacturing plant to produce engine components, power train products and air conditioner systems	San Luis Potosi	\$ 35
February	Akebono Brake	New production facility to supply disc pad brakes	Guanajuato	\$ 100
	Kitagawa Iron Works	Manufacturing facility for auto parts	Aguascalientes	\$ 81.3
	Marubeni-Itochu Steel	New manufacturing facilities for the production and stocking of steel sheets	Aguascalientes	\$ 20
	Yorozu	Manufacturing plant to produce components	Guanajuato	\$ 70
March	Jatco (2 nd phase)	Expansion of its production capacity for manufacturing automatic transmissions	Aguascalientes	\$ 112.5
TOTAL	22 companies			US\$ 766.2 million

* Initial investment

Source: Information compiled by Mexico's Secretary of Economy in Japan, based on firms' official investment announcements

メキシコ日本経済連携協定オフィスとは

2005年にメキシコ日本経済連携協定(EPA)が締結されたことを機に、在日メキシコ大使館内にメキシコ経済省の駐日代表部が設置されました。日本におけるEPAの浸透を図り、日墨間の通商と投資の拡大を促進する役割を担っています。

Office of Mexico-Japan Economic Partnership Agreement

The enactment in 2005 of the Mexico-Japan Economic Partnership Agreement (EPA) prompted the establishment of the office of Mexico's Secretary of Economy in Japan as part of the Embassy of Mexico in Tokyo. The office oversees the implementation of the EPA and promotes expansion of business and investments between Mexico and Japan.

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