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日本とメキシコの相互補完性を 最大限に活かす必要性

数年前、政府、民間企業および専門家が東京とメキシコシティにおいて日墨間の自由貿易協定のメリットについて評価を行った際、両国が貿易交渉を行うべき理由として挙げられたことの一つは、両国の相互補完性でした。両国経済が競合関係になかったばかりか、日墨の企業や生産者は生産、市場、供給網においてそれぞれに有利な条件を模索していたことから、専門家らは、この相互補完性が貿易協定によって制度化され、促進されれば、貿易・投資のフローが増加するであろうという結論に至りました。実際、2005年4月にメキシコ日本経済連携協定（EPA）が発効すると、両国の企業や生産者はそれぞれ相手国におけるビジネスを拡大、また日本企業はメキシコにおける投資機会を活用するようになったため、貿易・投資のフローは増加し始めました。

Mexico-Japan Trade and Investment Complementarities

JAPAN	MEXICO
World's 2 nd largest economy	World's 14 th largest economy
Average age of population: 43 years	Average age of population: 27 years
World's 4 th country in trade in goods	World's 15 th country in trade in goods
High saving rates	Economy in need of complementing domestic investment with FDI
8 th source of FDI in the world	4 th place among emerging economies in FDI attraction
Leading producer and exporter of high technology products	Importer of high technology products
Highly trained labor force	Abundance of young and trained labor force
Importer of 65% of its food consumption (World's 2 nd importer)	Producer and exporter of agro food products

両国間の貿易は2004年から2008年の間に40%も増加し、EPAには全般的にプラスの効果が認められるにもかかわらず、現在の貿易・投資の額は本来のポテンシャルに比べるとまだまだ低いといえます。日本、メキシコともに世界で上位15カ国に入る貿易大国であり、またメキシコは新興國中第4位の外国直接投資（FDI）受入国ですが、日本の貿易総額に占める対メキシコ貿易はわずか1%にも満たず、メキシコにとっての対日貿易も全体のわずか3%に過ぎません。

貿易・投資を伸ばすために メキシコと日本がすべきこと

制度面では、両国政府はEPAの枠組みにおいて市場アクセスの改善、特にメキシコ産食品の対日輸入アクセスの拡大を目指し協議を続けています。さらに、両政府は相互に訪問ミッションを実施したり、相手国においてビジネス拡大を図る企業に対し必要なインセンティブを与えるなど、EPAの普及活動を拡大させる必要があります。

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The need to maximize complementarities between Japan and Mexico

Several years ago, when governments, private sectors, and academia were evaluating the merits of a free trade agreement in Tokyo and Mexico City, one of the most often cited rationales for justifying trade negotiations between Japan and Mexico was the complementarities factor. Then, precisely because the two economies were not competing with each other, but rather their firms and producers were finding mutually beneficial traits in production, markets, and supply chains, experts concluded that those complementarities would serve in the increase of trade and investment flows if institutionalized and promoted through a trade agreement. Indeed, with the implementation of the Mexico-Japan Economic Partnership Agreement (EPA) in April, 2005, trade and investment flows started to increase as industries and producers from the two countries expanded their business in each other's markets and Japanese companies took advantage of investment opportunities in Mexico.

Notwithstanding the overall positive performance of the EPA, bilateral trade grew 40 percent between 2004 and 2008, after five years of its implementation, trade and investment numbers are still short of their true potential. Although both Japan and Mexico are among the world's top 15 trading nations, and Mexico is the fourth largest recipient of foreign direct investment (FDI) among emerging economies, today, Mexico represents less than one percent of Japan's total trade. And for Mexico its trade with Japan accounts for only three percent of its total trade.

Steps to improve bilateral trade and investment

Institutionally, in the framework of the EPA, the governments are engaged in ongoing discussions for granting better market access, especially for Mexican food products imported to Japan. Moreover, both governments have to continue expanding promotional activities, fostering reciprocal trade and business missions, and providing necessary incentives for businesses which are planning to expand either in Mexico or Japan.

From the private sector point of view, governmental involvement guaranteeing trade facilitation and promotion of investment could entice them to explore opportunities. Moreover, with the ensuing economic recovery, companies are again looking at opportunities overseas. The recovery is propelling trade growth, and the external sector is the main driver of economic recovery, both in Mexico and Japan. However, the challenge remains for Japanese and Mexican companies to

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民間セクターの視点からすると、政府の関与により貿易簡素化や投資促進のための制度作りがなされることで、新たなビジネスに挑みやすくなっています。さらに、景気の回復が確かなものとなったことで、企業は再び海外でのビジネス機会に目を向けています。景気回復により貿易が伸びていますが、メキシコ、日本にとって輸出は経済改善のための主軸となります。しかしながら、日墨の企業が互いの市場に存在するビジネス機会を認識し、相互補完性のメリットをより活かすためには、課題も残されています。日本では特に、再び上向いてきたとはいえ、その経済はすでに成熟しており、また出生率の低下や人口の高齢化による税負担の重圧により消費市場は十分に拡大していないため、企業は今後市場拡大の余地が大きいメキシコとの相互補完性を活用していく必要があるでしょう。

一方、メキシコ企業は国内景気の低迷と、最大の輸出先である米国での急激な販売の落ち込みの影響に苦戦しました。経済の回復と共に輸出は再び上昇していますが、将来また不況に見舞われたときの対策として、市場を多様化させることに力を注いでいます。アジアは、今後メキシコが貿易の拡大に重点を置くべき地域であり、特に日本は、地域で唯一メキシコが貿易協定を締結している相手国であるのみならず、最初の250年の取引は散発的であったとしても、4世紀もの長きにわたり相互に有益な交易関係を築いてきた歴史を持つ重要なビジネスパートナーです。

世界不況をチャンスと捉える

金融危機とそれに伴う各種業界における生産オペレーションの再編により、企業は競争力維持のための戦略の見直しを迫られました。一方、世界の金融システムのみならず、破綻の危機に陥った様々な産業を支えるために政府が介入を行ったことは、長期的な経済の安定が政策上重視されていることを意味します。貿易・投資の多様化は、輸出のほぼ8割を米国に依存するメキシコにおいては特に、継続的に努力を行うべき課題です。今後、日本市場はメキシコが輸出を拡大すべき市場としてさらに重要になるでしょう。同時に、原子力、再生可能エネルギー、省エネ、交通、航空宇宙、自動車、通信、インフラ、サービスなどの分野において日本企業が高い技術とノウハウを有することに加え、政府が日本企業の海外での事業入札を支援する新政策を打ち出したことは、これらの分野でプロジェクトを開発することが求められているメキシコに多くのビジネスチャンスが存在することを意味します。

メキシコ企業もまた、アジア地域において市場を拡大しています。日本においても自動車部品から食品まで多様な分野で販売を伸ばしており、食品分野ではアボカド、アスパラガス、メロン、マンゴー、マグロ、豚肉、牛肉、ビール、テキーラなどのメキシコ産品が日本市場でのシェアを拡大してきました。

Japanese Imports of Pork Meat Products (HS0203)

Unit: US\$ Million

		2007	2008	2009
1	U.S.A.	1,221.6	1,703.8	1,609.3
2	CANADA	741.7	885.4	969.5
3	DENMARK	716.9	802.5	686.3
4	MEXICO	222.9	292.3	247.0
5	CHILE	204.0	117.8	147.1
6	AUSTRALIA	4.6	3.0	1.6
7	SPAIN	1.2	1.1	0.7

Source: Ministry of Finance of Japan

Statistical Comparison of Mexico and Japan

	MEXICO	JAPAN
Population	106.9 million (2008)	125.8 million (2009)
GDP	US\$875 trillion (World's 14 th , 2009)	US\$5,068 trillion (World's 2 nd , 2009)
Exports	US\$229.7 billion (2009)	US\$580.8 billion (2009)
Imports	US\$234.4 billion (2009)	US\$552.3 billion (2009)
M-J Bilateral Trade	2.8% of Total (2009)	0.9% of Total (2009)
FDI Inflow	US\$23.2 billion (2008)	US\$24.6 billion (2008)

Source: SE with data from SE, INEGI, BANXICO, IMF, Ministry of Finance of Japan, and Statistic Bureau of Japan

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realize the opportunities in each other's markets and better take advantage of complementarities. The latter seems to be obvious among Japanese companies, which have to expand in overseas markets, since the Japanese economy, although growing again, is already mature and its consumer market is not expanding sufficiently due to the country's declining birth rate and fiscal burdens resulting from an expanding elderly population.

Mexican companies, on the other hand, have suffered from impacts of the domestic recession and drastic declining of sales to their main export market, the United States. With the economic recovery, exports are on the rise again, however, companies are focused on market diversification as a way to shield themselves from future economic turndowns. Asia is one region where Mexico's trade diversification could accelerate in the coming years, and Japan stands out as a business partner, not only because it is the only country in the region with which Mexico has a preferential trade agreement, but also because of a long history of mutually beneficial trade relations, which albeit sporadically in the first two hundred and fifty years, is going back four centuries.

The global crisis as an opportunity

The financial crisis, and the reorientation and restructuring of manufacturing operations in several sectors, among other factors, have prompted industries to rethink their strategies to maintain competitiveness. On the other hand, governments' involvement in supporting the global financial system, but also industrial sectors that were in danger of economic collapse, has meant policies that favor long-term economic sustainability. Diversification in terms of trade and investment should be an ongoing effort, particularly in Mexico, which relies on the United States for close to eighty percent of its exports. In the coming years, the Japanese market could become an important destination for more of Mexico's exports. At the same time, Japanese technology and know-how in areas such as nuclear power, renewable energies, energy savings and energy efficiency, transportation, aerospace, automotive, telecoms, infrastructure, and services, in addition to the new policy of the government to assist Japanese firms to win international bidding contracts, mean opportunities in Mexico, which is in need of developing projects in many of these areas.

In Asia, Mexican companies are also diversifying their markets, including Japan in sectors as diverse as autoparts and food

取引先の拡大とビジネスミッションの実施

2010年2月にメキシコのフェリペ・カルデロン・イノホサ大統領が訪日した際には経団連主催の大規模なセミナーが開催され、日墨の企業家が参加しました。来る6月4日には、メキシコの経済大臣が東京を訪れ、日本自動車工業会や日本自動車部品工業会のメンバーに向けて講演を行います。その後7月には省エネと環境技術に特化した日本企業からなるビジネスミッションがメキシコを訪れます。さらに来年には、日本の航空宇宙企業による二度目のメキシコ訪問ミッションが計画されています。また今年4月には、メキシコシティで開催された三井物産のメキシコ支社設立100周年記念式典において、代表取締役が大掛かりな投資プロジェクトについて発表を行いました。このように多くの取り組みが行われてはいるものの、日墨のビジネス関係を新たな次元にまで高め、本来のポテンシャルの域に達するには、まだ努力が不十分であるといえます。



President Calderon at the ceremony of Mitsui in Mexico, on April 29, 2010

さらなるイニシアチブの必要性

日本政府と経団連が他国に向けて実施した視察ミッションの成功にない、メキシコにも再生可能エネルギー、原子力、旅客鉄道、港湾インフラ、環境プロジェクト、そして自動車や航空宇宙産業といった様々な分野におけるビジネス機会を紹介するため、経団連の日本メキシコ経済委員会率いる日本企業のエグゼクティブによるハイレベルミッションを受け入れる準備があります。さらに、日本企業は自動車部品産業といった分野ですでに北米地域の一部に組み入れられているメキシコにおけるサプライチェーンの統合にも関心を示しています。北米で事業を行う日本企業は、この地域における生産統合の一端を担う機会を見逃してはなりません。メキシコは自動車、自動車部品、エレクトロニクス製品に加え、航空機部品、再生可能エネルギー関連機器、IT、エンジニアリングサービスなどのサプライヤーとしても地域における重要性を増しています。さらに、ハイレベルミッションの派遣を実現させることにより、日墨相互の市場において事業機会を見つけるべき中小企業を支援したり、これまでに未開拓だった分野の掘り起こしやイノベーションの促進、そして墨日EPAのメリットの拡大を後押しすることができるでしょう。

products. In the latter, Mexican food producers of avocados, asparagus, melons, mangoes, tuna, pork, beef, beer, and tequila, have expanded their presence in the Japanese market.

Stepping-in business contacts and trade missions

During the visit to Japan by Mexican President Felipe Calderon Hinojosa in February 2010, Keidanren hosted a large business seminar with Japanese and Mexican entrepreneurs. On June 4th, Mexico's Minister of Economy will be in Tokyo to address members of the Japan Auto Parts Industries Association and the Japan Automobile Manufacturers Association. The coming month of July, a business mission of Japanese companies specializing in energy efficiency and green technologies will travel to Mexico; and next year, a second mission of Japanese aerospace companies to visit Mexico is being planned. In April, Mitsui & Co. celebrated one hundred years of operations in Mexico, with its President and CEO announcing in Mexico City important investment projects. All in all, these efforts are important but still insufficient to steer the business relationship to new highs and develop their true potential.

A bolder initiative needed

Replicating the success of missions to other countries organized by the Japanese government and Keidanren, Mexico is ready to host a high profile business delegation of Japanese companies lead by Keidanren's Japan-Mexico Business Committee to showcase opportunities in sectors such as renewable energy, nuclear power, transportation –with interest in passenger railways, port and logistics infrastructure, environmental projects, and automotive and aerospace industries. Moreover, Japanese companies are interested in the integration of Mexican supply chains of sectors such as autoparts, which are integrated in the North American region. The latter has not been missed by Japanese companies with North American operations seeking to be part of that regional integration of production. Besides automotive, autoparts, and electronics, Mexico is developing as a regional supplier of aeronautical parts, renewable energy equipment, IT and engineering services. Furthermore, the high profile mission could be a catalyst for medium and small companies that have yet to explore opportunities in each market; it will contribute to develop partnerships in new areas seldom explored until now; foster innovation; and maximize advantages provided by the Mexico-Japan Economic Partnership Agreement.

RESOURCE INFORMATION ON MEXICO TRADE AND INVESTMENT

- Office of the President of Mexico (メキシコ大統領府) : <http://www.presidencia.gob.mx>
- Mexico's Secretary of Economy (メキシコ経済省) : <http://www.economia.gob.mx>
- Embassy of Mexico in Japan (在日メキシコ合衆国大使館) : <http://www.sre.gob.mx/japon/>
- PROMEXICO (メキシコ貿易投資促進機関) : <http://www.promexico.gob.mx>
- Mexico's National Institute of Statistics, Geography and Informatics (メキシコ国立統計地理情報院) : <http://www.inegi.org.mx>
- Mexico's Central Bank, Banco de México (メキシコ銀行) : <http://www.banxico.org.mx>
- Mexico's Secretary of Agriculture, Livestock, Rural Development, Fisheries and Food (メキシコ農牧林漁業省) : <http://www.sagarpa.gob.mx>
- Mexico's Secretary of Energy (メキシコエネルギー省) : <http://www.sener.gob.mx>
- Mexico Tourism Board (メキシコ観光局) : <http://www.visitmexico.com>
- The Mexican Automotive Industry Association (メキシコ自動車工業会・AMIA) : <http://www.amia.com.mx>

自動車部品メーカー、製造拠点を 米国からメキシコへ移転

自動車需要の低迷と全世界的な自動車産業の再編が起きた結果、自動車部品サプライヤーは各地の生産拠点をよりコストが安く、質の高い労働力が豊富で、さらに製品デザインや技術革新を行うことが可能な国へと移設する動きが出てきました。北米市場に製品を供給している自動車部品メーカーの多くが、そのような生産拠点の移設先としてメキシコを選んでいきます。それは、人件費と輸送費が安く、ペソドルの為替が安定しており、製造業の競争力が高いからです。KPMGのコンペティティブ・オルタナティブ-2010年版国際ビジネス・ロケーションや、アリックス・パートナーズの2009年版生産アウトソーシングコスト・インデックスといった最近の調査でも、米国の製造業者にとってメキシコは中国、インドその他の新興国を抜いて最も生産コスト競争力の高い国であることが確認されています。実際、メキシコのエンジニアの高い能力を生かしたハイエンドな製品生産から労働集約的な生産に至るまで、自動車部品メーカーが次々とメキシコに生産拠点を設けています。それら企業の多くは米国にも拠点を有しています。他国企業の動きに倣い、日本の自動車部品メーカーも、以下の表が示すとおり、北米市場向け生産の一部をメキシコに移しています。

Autoparts Suppliers to Relocate U.S. Manufacturing Operations to Mexico

As a result of the decrease in the demand for automobiles and the restructuring of the car industry worldwide, autoparts suppliers have been relocating their manufacturing operations to a handful of countries where production costs are lower, where supply of skilled labor is plentiful, and where product design and innovation is also available. For an increasing number of autoparts companies that supply to the North American market, Mexico is the preferred destination of such migration because of the competitiveness of its manufacturing sector with competitive labor and shipping cost and stable currency exchange of peso-dollar. Recent business surveys, including KPMG's Competitive Alternatives, 2010 Guide to International Business Location, and AlixPartners' 2009 Manufacturing-Outsourcing Cost-Index, show that Mexico is the most competitive country in the cost of manufacturing outsourcing for U.S. clients, surpassing China, India and other emerging countries. For from high-end manufacturing using local engineering talent to labor intensive production, Mexico is attracting autoparts suppliers, many of which are also located in the United States. Japanese autoparts suppliers have noticed this trend and they too are relocating part of their North American production to Mexico, as the table below shows.

Autoparts Manufacturing Projects in Recent Years in Mexico (Partial List)

NGK Insulators (Japan)	In 2010, investing US\$100 million, resumes its project to establish a new plant of diesel particulate filters (DPF).
Clarion (Japan)	In 2010, investing US\$3 million and employing fifty people, manufactures satellite navigation systems at its plant in Queretaro.
Ahresty (Japan)	In 2010, expands its foundry processing plant in Zacatecas doubling current auto parts output, with more than US\$4 million investment.
Nippon Kayaku (Japan)	In 2010, announced the construction of its second plant in Monterrey, to manufacture circuit boards, investing US\$14 million and employing up to 300 workers. The first plant constructed in 2009 currently employs 100 workers.
AKT Altmarker Kunststoff-Technik (Germany)	In 2009, signed a contract with The Offshore Group of Tucson, Arizona, for the provision of outsourced manufacturing support, or "shelter" services in Saltillo to produce molded autoparts, employing 83 workers.
Kinugawa Rubber (Japan)	In 2009, announced a plan to establish a manufacturing plant for weather strips in Guanajuato, investing US\$3 million and employing 80-90 workers.
Tokai Rubber Industries (Japan)	In 2009, transferred the production of hoses for automobiles from Ohio and Tennessee to Mexico.
American Axle Manufacturing (U.S.A.)	In 2009, closing its plant in Detroit, transferred the production of axles to Guanajuato.
Posco (Korea)	In 2009, opened a new plant in Altamira, Tamaulipas, to manufacture steel sheets for automobiles, investing US\$250 million and employing about 200 workers.
Hydro Aluminum (Norway)	In 2009, transferred the production of tubing products and extruded profiles from Michigan to Reynosa.
Kongsberg Automotive (Norway)	In 2008, closing its plants in Michigan, Texas, Ohio and Kansas, transferred their production to Reynosa, Nuevo Laredo and Matamoros, creating 355 jobs in Mexico.
Hitachi Chemical (Japan)	In 2008, established a new plant for the production of formed sheets for meter panel for automobiles, investing about US\$25 million and employing 100 workers.
Leoni Wiring System (Germany)	In 2008, opened its third plant in the country in Durango to manufacture cable harnesses for American commercial vehicles, eventually creating more than 1,000 jobs.
Schaeffler (Germany)	In 2008, opened its second plant in the country in Irapuato, Guanajuato, to manufacture rolling bearings and engine and chassis components, creating 400 jobs.
Hella KGaA Heuck (Germany)	In 2008, opened a new plant in Guanajuato to manufacture transmission range and pedal sensors mainly for the North American market, investing US\$45 million and employing 400 workers.

Source: Information compiled by Mexico's Secretary of Economy, Representative Office in Japan

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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