## Administrative Registry of the Light Vehicle Automotive Industry, December 2025

Next publication: February 10, 2026

**Table 1. Percentage changes in production, exports, and sales of light vehicles (original figures).**

| Production, exports and sales | December | | Cumulative total for the year 2025 |
|---|---|---|---|
| | Monthly growth (%) | Annual growth (%) | Annual growth (%) |
| Production | -24.28% | 8.45% | -0.90% |
| Exports | -17.99% | -14.55% | -2.68% |
| Sales | 4.10% | 4.97% | 1.35% |

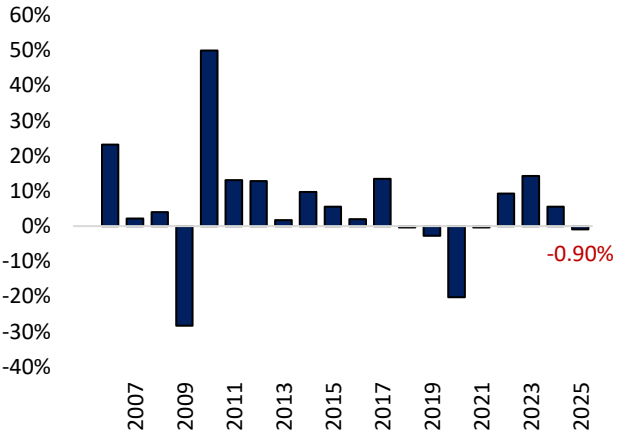
Source: GF BASE with information from INEGI

### Production

The Administrative Registry of the Light Vehicle Automotive Industry showed that, for the year as a whole, production totaled 3,953,494 light vehicles, representing an annual decline of 0.90%, the first drop for a full year since 2021. In fact, this is the third largest decline in a year, behind only the declines in 2009 (-28.31%) and 2020 (-20.23%), periods considered to be recessions.

In December, production totaled 243,961 units, representing an annual growth rate of 8.45%, breaking a streak of four consecutive months of annual declines and marking the highest growth since March. However, compared to the all-time high for the same month, recorded in 2017, December production fell by 7.38%.

**Figure 1.** Light vehicle production each year




Source: GF BASE with information from INEGI

Internally, light vehicle production is divided into two types: 1) light trucks, which accounted for 77.85% of total production in December and include pickups, SUVs, and minivans, and 2) automobiles, which accounted for 22.15% of total production and include compact, subcompact, and luxury cars. For the year, light truck production accounted for 77.20% of total production, while car production accounted for 22.80%.

**Light trucks**

In December, production of this type of vehicle showed annual growth of 8.24%, breaking a streak of three consecutive months of declines and representing the highest growth since March. However, year-to-date, production of this type of vehicle shows weakness, growing only 0.34%, the lowest increase since 2020, when production was affected by the pandemic.

Within the light truck segment, SUVs are the most important in terms of light vehicle production, accounting for 59.26% of light truck production in December and 46.14% of total production for the month. In this context, SUV production in December registered an annual increase of 1.45%, ending a three-month streak of declines. However, for the year, SUV production registered growth of only 0.19%, the lowest since 2020 when a decline was recorded due to the pandemic.

On the other hand, the second most important segment in production is Pick Up, which accounted for 40.56% of light truck production in December and 31.58% of total production, registering annual growth of 20.27%. However, for the year as a whole, this segment recorded growth of 0.78%, the lowest since 2020, when production in this segment fell by 4.79% annually.

**Automobiles**

Production of this type of vehicle grew by 9.20% in December, the largest annual increase since January 2025. Year-to-date, this type of vehicle shows a 4.90% annual decline, the first contraction since 2022.

Internally, the compact car segment, which is the most important in the automobile category and the third most important segment in total production, recorded an annual decline of 4.12%, adding up to six months of contractions, which had not been seen since June 2021 to May 2022, when it fell for 12 consecutive months. It is worth mentioning that in December, this segment accounted for 71.83% of automobile production and 15.91% of total production. In the year to date, production in this segment fell 6.98%, the largest decline since 2022. Meanwhile, subcompact car production grew 2.19% annually in the year to date, while luxury car production increased 0.31% annually. These segments accounted for 20.38% of total light vehicle production in 2025.

**Table 2. Light vehicle production by segment (original figures).**

| Light vehicle segments | December | | Cumulative for the year 2025 | |
|---|---|---|---|---|
| | Production | Annual growth (%) | Production | Annual growth (%) |
| **Light trucks** | **189,933** | **8.24%** | **3,052,163** | **0.34%** |
| SUV's | 112,555 | 1.45% | 1,958,966 | 0.19% |
| Pick Ups | 77,036 | 20.27% | 1,091,081 | 0.78% |
| Minivans | 342 | -27.85% | 142,463 | -44.29% |
| **Automobiles** | **54,028** | **9.20%** | **901,331** | **-4.90%** |
| Compacts | 38,811 | -4.12% | 663,419 | -6.98% |
| Subcompacts | 11,377 | 26.44% | 142,463 | 2.19% |
| Luxury cars | 3,840 | - | 95,449 | 0.31% |
| **Total** | **243,961** | **8.45%** | **3,953,494** | **-0.90%** |

Source: GF BASE with information from INEGI

In 2025, the three brands with the highest production of light vehicles in Mexico were:

- General Motors (21.69% of total production), with an annual decline of 3.59%, the largest since 2021.
- Nissan (16.66% of total production), with an annual decline of 1.70%, the first contraction since 2022.
- Ford (10.55% of total production), with annual growth of 7.89%, marking five consecutive years of growth in production.

It is worth mentioning that the two automakers that have historically been the most important in Mexico had not recorded declines in production in the same year since 2020 and, before that, since 2009.

Nissan's lower production this year is due to the fact that, in February, the company announced plans to reduce its global production capacity by 20% and that, in total, it would reduce its global production from the current five million units to four million units by fiscal year 2026. In addition, in July, it announced that it would close the CIVAC plant in Cuernavaca and transfer its production to the plant in Aguascalientes, with the aim of reducing global production from 3.5 million (not including production in China) to 2.5 million units.

In December, General Motors accounted for 16.19% of production, Nissan for 14.57%, and Ford for 14.27%. Together, they represent 45.04% of cumulative production, making them the most important automakers in the country. It is noteworthy that General Motors recorded a 29.80% annual drop in production during the month, due to a 20-day technical shutdown that began on December 15. Nissan and Ford, on the other hand, recorded annual increases in December of 5.21% and 55.58%, respectively.

**Table 3. Percentages changes in production by brand (original figures).**

| Brand | December | | Cumulative for the year 2025 | |
|---|---|---|---|---|
| | Production | Annual growth (%) | Production | Annual growth (%) |
| General Motors | 39,504 | -29.80% | 857,431 | -3.56% |
| Nissan | 35,556 | 5.21% | 658,536 | -1.70% |
| Ford Motor | 34,811 | 55.58% | 417,280 | 7.89% |
| Chrysler | 33,412 | 28.00% | 396,281 | -5.52% |
| Volkswagen | 18,078 | 40.66% | 335,716 | -12.19% |
| Toyota | 21,442 | 15.90% | 310,152 | 26.59% |
| KIA | 21,170 | 6.38% | 288,100 | 6.43% |
| Mazda | 9,606 | -29.61% | 174,524 | -16.62% |
| Honda | 10,220 | -3.59% | 158,757 | -18.42% |
| Audi | 8,820 | 31.33% | 146,579 | 1.63% |
| BMW | 3,840 | - | 95,449 | 0.31% |
| Mercedes Benz | 4,133 | 124.74% | 57,063 | -0.83% |
| Acura* | 2,251 | 7403.33% | 32,943 | 109710.00% |
| JAC | 1,118 | -51.52% | 24,683 | -2.79% |
| **Total** | **243,961** | **8.45%** | **3,953,494** | **-0.90%** |

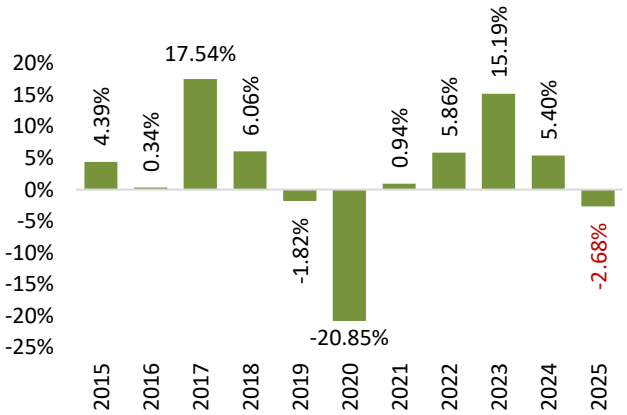
Source: GF BASE with information from INEGI
*Acura is currently manufacturing the ADX model at Honda's plant in Celaya, Guanajuato, since in January 2025.

**Exports**

In December, 227,262 units were exported, showing an annual contraction of 14.55% compared to the same month in 2024, marking the fourth consecutive annual decline and the largest since December 2021. For the month of December, it is the largest decline since 2021 and, prior to that date, the largest on record.

In 2025, 3,385,785 light vehicles were exported, accumulating a 2.68% drop compared to 2024 (Figure 2), when exports reached an all-time high. This is the first decline in exports for a full year since 2020 (-20.85%) and prior to that date since 2019 (-1.82%).

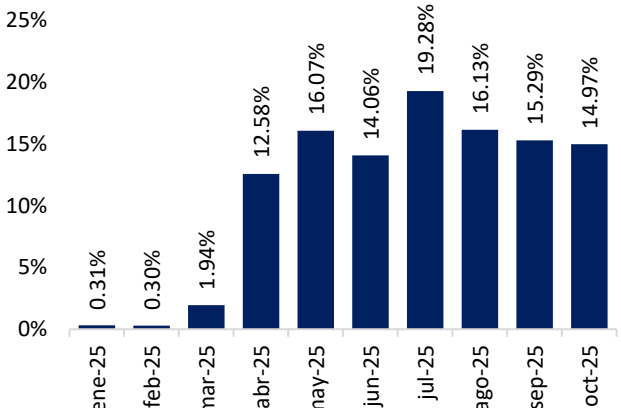
**Figure 2.** Cumulative growth in exports each year




Source: GF BASE with information from INEGI

The cumulative contraction in exports is mainly due to trade with the United States, as automotive exports to that country have fallen due to the imposition of sectoral tariffs. It should be noted that light vehicles and some auto parts, as well as heavy trucks, are subject to a 25% tariff, from which US content is excluded. As of August, the latest data available from the U.S. Department of Commerce, the average tariff charged on U.S. imports of light vehicles from Mexico was 14.97% (item 8703), up from 0.31% in January, before the Donald Trump administration took office (Figure 3).

**Figure 3.** Tariff charged in the United States on imports of passenger automobiles (heading 8703)



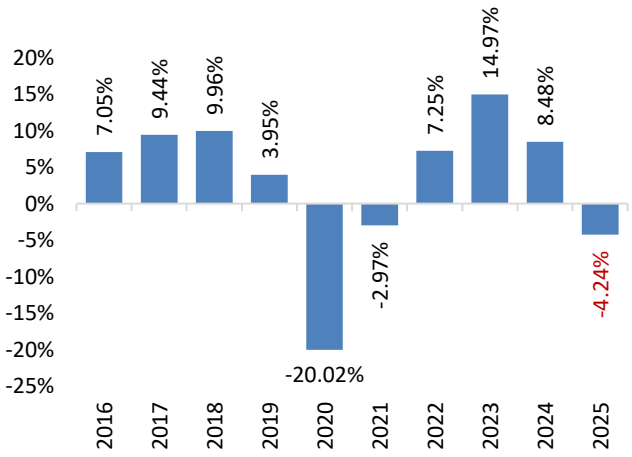

Source: GF BASE with information from USA Trade

In 2025, automotive exports to the United States fell by 4.24% (Figure 4). As a result, in 2025, automobile exports to the United States accounted for 78.38% of the total, down 1.27 percentage points from 2024 (79.66%). This led to Canada gaining market share, as exports to that country accounted for 11.11% of the total in 2025, up 2.66 percentage points from 2024.

The impact of the decline in total exports for the year is not uniform across brands, with Mazda standing out, whose exports have fallen 37.59% annually, Volkswagen with 16.19%, Mercedes-Benz with 13.58%, Chrysler with 4.86%, BMW with 7.32%, and General Motors with 0.93%.

Only exports to the United States have seen a more significant decline, with Mazda falling 51.57% year-on-year, Audi 15.97%, Mercedes-Benz 16.64%, Volkswagen 15.15%, KIA 14.84%, Chrysler 5.09%, Nissan with 8.88%, Honda-Acura with 7.11%, and General Motors with 1.17% (Table 4). Overall, in 2025, these brands exported 197,768 fewer units to the United States than in 2024.

**Figure 4.** Cumulative growth of exports to the United States by year




Source: GF BASE with information from INEGI

**Table 4. Variation in cumulative exports to the United States, by brand (cumulative for 2025)**

| Brand | Annual variation for 2025 | Unit variation |
|---|---|---|
| Toyota | 30.46% | 69,398 |
| Ford Motor | 2.98% | 10,688 |
| BMW | 0.76% | 292 |
| General Motors | -1.17% | -8,313 |
| Chrysler | -5.09% | -15,991 |
| Honda - Acura | -7.11% | -15,043 |
| Nissan | -8.88% | -28,994 |
| KIA | -14.83% | -24,778 |
| Volkswagen | -15.15% | -35,006 |
| Audi | -15.97% | -8,918 |
| Mercedes Benz | -16.64% | -2,648 |
| Mazda | -51.57% | -58,077 |

Source: GF BASE with information from INEGI

It is important to note that the cumulative decline in automotive production by brand is closely related to the variation in exports to the United States and reflects the adjustments that companies are making to adapt and absorb the impact of tariffs. It is concerning that the decline in production by Mazda, Volkswagen, Chrysler, Nissan, Honda-Acura, and Mercedes-Benz is occurring at the same time and to a similar extent as the decline in exports to the United States. It can be concluded that in these cases, automotive production in Mexico is directly affected by the tariffs imposed by the Trump administration and that companies have not been able to prevent the decline in production through increased exports to alternative destinations (Table 5).

In contrast, the decline in KIA exports to the United States has not been reflected in a decline in production of this brand in Mexico, as it has grown by 17,400 units compared to 2024 (Table 5), implying that more is being produced to meet domestic demand, accumulate inventories, and ship to other export destinations. In 2025, KIA exports show a growth of 5.4% or 11,194 units compared to 2024.

**Table 5. Cumulative variation in exports to the United States (January to December) and comparison with cumulative variation in production in Mexico during the same period.**

| Brand | Cumulative change in exports to the United States | Cumulative change in total production |
|---|---|---|
| Toyota | 69,398 | 65,145 |
| Ford Motor | 10,688 | 30,504 |
| BMW | 292 | 298 |
| Mercedes Benz | -2,648 | -476 |
| General Motors | -8,313 | -31,641 |
| Audi | -8,918 | 2,356 |
| Honda - Acura | -15,043 | -2,942 |
| Chrysler | -15,991 | -23,145 |
| KIA | -24,778 | 17,400 |
| Nissan | -28,994 | -11,405 |
| Volkswagen | -35,006 | -46,596 |
| Mazda | -58,077 | -34,779 |

Source: GF BASE with information from INEGI

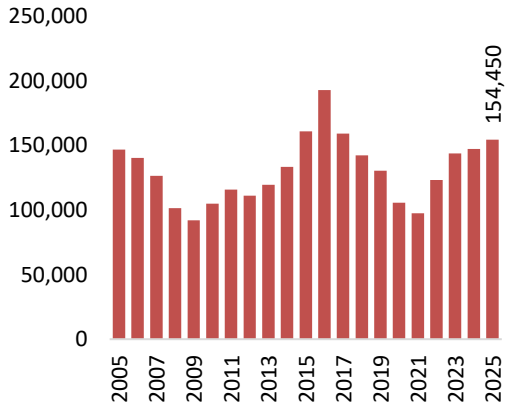
**Sales**

In December 2025, 154,450 units were sold in Mexico, showing an annual growth of 4.97%. With this, annual growth was recorded in 7 of the 12 months of the year. However, compared to the historical high recorded for the same month in 2016, sales accumulated a drop of 19.87%.

Nissan was the automaker with the highest sales for the month (18.96% of the total), followed by General Motors with 13.93% of the total. Nissan's sales grew by 16.03% year-on-year, its highest annual growth since February 2025. Similarly, General Motors saw an 11.24% year-on-year increase in sales, the highest since May 2024.

In 2025, a total of 1,524,638 units were sold, representing an increase of 1.35% compared to 2024, the lowest growth since 2020.

**Figure 5.** Light vehicles sales, December of each year




Source: GF BASE with information from INEGI

In 2025, the three brands with the highest sales of light vehicles in Mexico were (Table 6):

- Nissan (18.00% of total sales), with annual growth of 7.58%, accelerating from 5.38% last year.
- General Motors (13.00% of total sales), with an annual decline of 3.36%, the first for a full year since 2021.
- Volkswagen (9.05% of total sales), with an annual contraction of 0.15%, the first since 2022.

**Table 6. Percentage changes in sales for the six leading automakers (original figures).**

| Brand | December | | Cumulative for the year 2025 | |
|---|---|---|---|---|
| | Sales | Annual growth (%) | Sales | Annual growth (%) |
| Nissan | 29,279 | 16.03% | 274,461 | 7.58% |
| General Motors | 21,508 | 11.24% | 198,153 | -3.36% |
| Volkswagen | 14,128 | -0.58% | 137,970 | -0.15% |
| Toyota | 12,584 | 18.65% | 126,358 | 3.60% |
| KIA | 10,393 | 9.39% | 111,172 | 6.50% |
| Mazda | 8,843 | 1.91% | 107,004 | 7.22% |
| Others | 57,715 | 3.07% | 569,520 | -1.78% |
| **Total** | **154,450** | **4.97%** | **1,524,638** | **1.35%** |

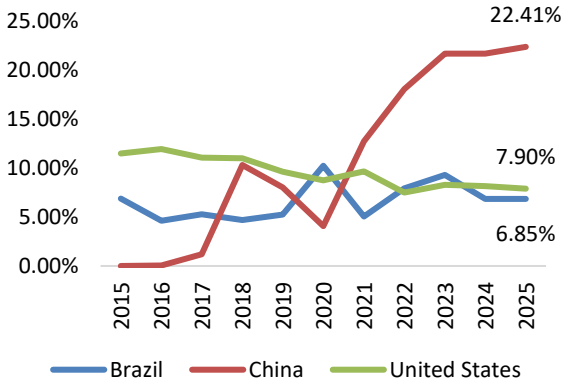
Source: GF BASE with information from INEGI

**Imported vs. Domestic light vehicle sales**

In December, 65.69% of sales in Mexico were imported cars, with 101,461 units sold. Domestic vehicle sales accounted for 34.31% of total sales. In the same month, 34,616 vehicles imported from China were sold, representing an increase of 8.36% compared to the same month in 2024. Sales of vehicles imported from China in December accounted for 22.41% of total light vehicle sales in Mexico and 34.12% of total imported vehicle sales. In the same month, the United States had a 7.90% share of total sales and Brazil had a 6.85% share.

During the year, 988,750 imported vehicles were sold, corresponding to 64.85% of the total of 2,025. This represented a 0.39% drop in sales of imported vehicles, while those of domestic origin showed a growth of 4.73%.

**Figure 6.** Proportion of total vehicles imported from China, the United States, and Brazil, December of each year




Source: GF BASE with information from INEGI

Although Nissan was the leading brand in total sales, General Motors had the highest sales of imported vehicles during the year, accounting for 17.77% of the total imported vehicles, with an annual growth of 0.30% compared to 2024. It was followed by Toyota, which accounted for 11.69% (annual growth of 0.52%), and Volkswagen with 7.74% of total imports (annual contraction of 9.40%).

**Domestic sales of hybrid and/or electric vehicles**[1]

In December 2025, hybrid vehicle sales stood at 15,169 units, up 13.89% compared to the same month in 2024. Meanwhile, sales of electric vehicles stood at 1,926 units, showing an annual decline of 5.63%. Over the year, sales of hybrid vehicles grew by 25.78% compared to the same period last year. This means that a total of 125,801 hybrid vehicles were sold in 2025. As for fully electric vehicles, a total of 20,923 units were sold in the year to date, representing a 13.86% drop compared to the same period in 2024.

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[1] Domestic sales of hybrid and/or electric vehicles are not considered in light car sales statistics, i.e., they are accounted for separately