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Between Industrial Success and Economic Fragility: The Auto Parts Sector and the Limits of Regional Development in Querétaro

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ABSTRACT:
This article analyzes the current situation of the automotive sector, with particular emphasis on the auto parts industry, in the State of Querétaro during 2025. It evaluates both its contribution to regional economic growth and the structural risks associated with a high level of sectoral dependence. The central objective is to critically examine the role this sector has played in employment generation, the increase in state gross domestic product, and Querétaro's integration into global value chains, while also identifying the vulnerabilities derived from this development model in an increasingly uncertain international context.
Using an analytical approach grounded in the literature on regional development, productive specialization, and global value chains, the study integrates recent statistical evidence, public policy analysis, and specialized academic contributions. The findings show that the auto parts sector has consolidated itself as one of the main economic engines of the state; however, this specialization has generated high exposure to external factors, such as restrictive trade policies in the United States, increasing competition from the Chinese automotive sector, and the limited integration of local suppliers into high value-added segments.
The conclusions indicate that, although the automotive sector has driven economic growth in Querétaro, its predominance poses significant risks to long-term economic resilience. In this regard, the article underscores the need to diversify the state's productive structure by strengthening other strategic sectors, in order to reduce vulnerability to external shocks and promote more balanced and sustainable regional development.

KEY WORDS: Automotive industry, auto parts sector, regional development, economic diversification, global value chains, Querétaro economy

INTRODUCTION

The automotive sector has consolidated itself as a pillar of economic development in the State of Querétaro in 2025, contributing significantly to formal employment, the attraction of foreign direct investment, and regional growth. According to data from Líder Empresarial (2025), this industry represents approximately 31.3% of the state's Gross Domestic Product (GDP), generating tens of thousands of direct and indirect jobs and consolidating an integrated manufacturing network for vehicles and auto parts. The strong dynamism of the sector in Querétaro has been reinforced by the state's integration into North American value chains under the United States–Mexico–Canada Agreement (USMCA), as well as by the establishment of industrial coordination mechanisms such as the Querétaro Automotive Cluster, which brings together firms, academic institutions, and government to promote competitiveness, innovation, and the development of specialized human capital (Red Estatal de Clústeres de Querétaro, 2024; El Economista, 2024).

However, this high degree of sectoral concentration also entails significant structural risks. First, economic dependence on the automotive sector makes the state economy vulnerable to external shocks, such as fluctuations in international demand or changes in trade policies in key destination markets. For example, the threat of imposing 25% tariffs on Mexican products by the Donald Trump administration—particularly on vehicles and auto parts exported to the United States—has generated market uncertainty and pressure on investment decisions within the automotive industry (Castigo en Bolsa…, 2025).

Second, the growing importation of Chinese vehicles represents an additional challenge for the national and regional automotive industry. In recent years, China has become one of the main suppliers of imported vehicles to Mexico, surpassing even the United States as a source of foreign vehicles. According to Mexico's central bank (Banxico), in the first months of 2025, vehicles exported from China accounted for nearly 30% of total vehicle imports into Mexico, reflecting the sustained growth of Chinese brands such as BYD, SAIC, Chery, and JAC in the Mexican market (China Becomes Mexico's Top Car Supplier…, 2025). In 2023, Chinese vehicle imports accounted for approximately 20% of total new vehicle sales in the country and nearly one-third of all imported vehicles that year (Fastmarkets, 2024; MarkLines, 2024).

This increase in imports contrasts with the relatively low participation of Mexican production in the domestic market, given that a large share of vehicles produced in Mexico is destined for export—mainly to the United States and Canada—while a growing portion of domestic sales comes from imported vehicles, particularly those of Chinese origin (MarkLines, 2024). For instance, in 2023 approximately 66.4% of vehicles sold in Mexico were imported, with sales of vehicles manufactured in China contributing substantially to this trend (MarkLines, 2024).

This context generates a third structural risk: the potential erosion of the local auto parts production chain. Although Mexico maintains a favorable trade balance in auto parts—where exports significantly exceed imports—the participation of Chinese suppliers in specific niches has begun to increase, particularly in lower value-added components. This trend could limit the participation of Mexican suppliers and reduce incentives to invest in innovation and technology in the medium term (The Other Side…, 2025). While imports of Chinese auto parts still represent a relatively small fraction of total imports, their upward trend and competitive pressure have implications for the productive structure.

The dynamics of Chinese vehicle imports have also sparked debate regarding Mexican trade policy. In 2025, the government announced tariff increases of up to 50% on automobiles and auto parts imported from countries without trade agreements—including China, India, and South Korea—with the aim of fostering domestic production and reducing pressure from low-cost imports (Reuters, 2025; AP News, 2025). While these measures seek to counteract the loss of market share to imported products and protect the local industry, they also pose risks of trade retaliation, potential price increases for consumers, and diplomatic tensions, particularly with markets such as China, with which Mexico has no free trade agreement.

Within this global panorama, Querétaro's strategic role in the Mexican automotive sector entails both significant opportunities and substantial vulnerabilities. Its solid industrial base and integration into North American chains have been fundamental to local economic growth; however, exposure to external tariff policies, competition from Chinese vehicle imports, and Mexican consumers' growing preference for imported vehicles underscore the need for productive diversification and strategies aimed at increasing local content and technological innovation within Querétaro's automotive industry. An integrated analysis of these risks is essential for designing public policies and business strategies capable of sustaining regional development in an increasingly competitive and uncertain global environment.

BACKGROUND

The specialization of the State of Querétaro in the automotive sector cannot be understood as a spontaneous process, but rather as the result of decades of strategic decisions, favorable structural conditions, and deliberate public policies aimed at positioning the state as a competitive node within advanced manufacturing in Mexico.

This trajectory is closely linked to changes in the global economy, Mexico's structural reforms, and the integration of global value chains in internationally trade-intensive sectors, among which the automotive industry has gained prominence (Banda Ortiz, Gómez Hernández, & Carrión Ruiz, 2016).

Mexico's trade liberalization beginning in the 1990s, with the signing of the North American Free Trade Agreement (NAFTA), created incentives for regions with logistics infrastructure and competitive labor forces to orient themselves toward export-oriented industries (Rodríguez-Pose, 2013). In this context, Querétaro positioned itself geographically as a strategic point within the Bajío region, which has emerged as one of the country's main automotive manufacturing hubs. Querétaro's connectivity to major national logistics corridors and its proximity to U.S. and Canadian markets favored the location of automotive and auto parts firms, particularly those oriented toward export production (Campos Vázquez & Campos Ortiz, 2023).

Beyond geostrategic positioning, the state developed specialized industrial infrastructure beginning in the early 2000s, promoting the construction of industrial parks designed specifically to attract high value-added manufacturing investments, particularly auto parts suppliers (Insights Tetakawi, 2018). This infrastructure enabled the generation of agglomeration economies, where proximity between supplier firms and final buyers reduced transaction costs and facilitated the creation of integrated supply networks—an advantage that other industries with lower productive density, such as certain service sectors or agro-industrial activities, were unable to replicate as effectively.

The formation of specialized human capital has been another pillar of the automotive sector's success in Querétaro. The state gradually strengthened its technical and professional educational institutions, aligning academic programs with the needs of advanced manufacturing, engineering, and applied technology. Institutions such as the Universidad Politécnica de Querétaro developed specific programs in automotive engineering and advanced manufacturing, contributing to the creation of a skilled labor force that reduced initial training costs for firms and attracted investments of greater technological complexity (Gereffi, 2018). This alignment between education and productive needs distinguished the automotive sector from others that did not generate comparable demand for specialized technical profiles.

From a public policy perspective, the State Development Plans (Planes Estatales de Desarrollo, PED) have played a decisive role in consolidating the automotive sector as a pillar of Querétaro's development model. The 2016–2021 State Development Plan explicitly included the automotive sector among its strategic axes, recognizing it as a high-impact industry for economic growth, formal employment, and the attraction of foreign direct investment (Government of the State of Querétaro, 2016). This plan established lines of action aimed at strengthening productive infrastructure, promoting technological innovation, and facilitating the integration of local suppliers.

Similarly, the 2021–2027 State Development Plan reaffirmed the importance of the automotive industry, highlighting it as one of the key economic activities for consolidating Querétaro as an advanced manufacturing hub and for strengthening its integration into global value chains, particularly within the context of nearshoring (Government of the State of Querétaro, 2021). This document emphasizes governmental intent to support sector expansion through fiscal incentives, innovation and training programs, and actions aimed at developing local suppliers capable of integrating into global production networks.

Beyond state plans, the academic literature highlights the importance of industrial cluster models, which in Querétaro materialized in the creation of the Querétaro Automotive Cluster. This cooperative scheme between the public sector, firms, and academia seeks to facilitate institutional coordination, promote technological innovation, and develop local productive capacities (Iturralde González, 2024). The consolidation of the cluster has been a key factor in attracting Tier 1, Tier 2, and Tier 3 supplier investments, generating productive linkages that have reinforced the competitiveness of the automotive industry relative to sectors lacking similar articulation, such as certain service niches or agro-industry.

Nevertheless, the decision to center a significant portion of industrial development strategy on the automotive industry has not been free of criticism. A first structural critique concerns the vulnerability associated with excessive specialization. The regional development literature warns that strong concentration in a single sector exposes economies to external shocks, such as fluctuations in global demand, changes in trade policies among key partners, or disruptions in global supply chains (Rodríguez-Pose, 2013). This risk is particularly relevant for Querétaro, given that a substantial share of automotive production is destined for external markets, rendering the local economy sensitive to geopolitical and economic events beyond its control.

A second critique focuses on the potential crowding out of other productive sectors. By allocating resources— both public and private—to automotive sector expansion, some authors argue that the development of other economic activities with diversification potential, such as agro-industry, digital culture, or high value-added services, may be constrained (Crossa & Ebner, 2020). This situation can generate growth patterns in which productive density is concentrated in automotive activities, leaving other sectors with fewer resources to compete effectively for investment or specialized human capital.

Additionally, strong dependence on transnational capital in the automotive industry has been noted as limiting the capacity of local public policies to act autonomously in the face of external corporate decisions, such as plant relocations, process automation, or shifts in technological demand (Crossa & Ebner, 2020). This phenomenon can hinder the implementation of policies aimed at strengthening the domestic market or developing sectors more oriented toward the local economy.

In sum, the background of automotive development in Querétaro reveals a deliberate trajectory consistent with public policies oriented toward advanced manufacturing and global integration, explicitly supported in the two most recent State Development Plans. However, this strategy has also generated criticism regarding its potential impact on economic resilience and the relative effectiveness of concentrating resources on a single sector without complementary diversification policies.

THEORETICAL FRAMEWORK

Productive specialization and regional development

Productive specialization is a central concept in regional development theory, describing how territorial economies concentrate on specific activities to leverage competitive advantages, generate welfare, and connect to global markets. According to Gereffi (2018), global value chains (GVCs) allow regions to integrate into international production networks, potentially translating into economic growth and job creation through collaboration with transnational firms in advanced manufacturing and export processes. This integration has been a fundamental driver for developing regions seeking to attract foreign direct investment and increase labor productivity.

The literature also emphasizes that while specialization enables economies of scale and productive linkages, it can generate structural vulnerabilities when territories depend excessively on a single sector. Rodríguez-Pose (2013) argues that high productive concentration can reduce a region's capacity to adapt to exogenous shocks, such as technological change, adverse macroeconomic conditions, or transformations in international trade. This is particularly true when institutions and public policies fail to facilitate economic diversification or adaptation to new productive realities.

The case of Querétaro: automotive specialization and productive linkages

In the State of Querétaro, the automotive industry has played a predominant role in regional economic transformation over recent decades. Unlike other states that relied on low-technology industries or domesticmarket sectors, Querétaro specialized in the manufacture of auto parts and automotive components, becoming a strategic node within the Bajío automotive cluster. Studies on productive networks and the international division of labor show that states without final vehicle assemblers, such as Querétaro, can achieve significant growth when supplier firms integrate into global value chains and deploy technologically advanced production processes (Arciniega Arce, 2023).

Automotive specialization in Querétaro has been supported by several interrelated factors:

Geographic and logistical location: proximity to major corridors leading to the United States and Canada reduces transportation costs and facilitates export competitiveness.

Specialized human capital: the orientation of educational programs toward engineering and technical manufacturing has reinforced the supply of skilled labor essential for advanced industries.

Institutional cluster promotion policies: mechanisms such as the Querétaro Automotive Cluster have coordinated efforts among government, academia, and firms to attract investment and strengthen productive linkages.

These factors, integrated into recent State Development Plans, have conceptualized the automotive sector as a strategic engine for employment generation, foreign direct investment, and technological modernization.

Risks of extreme specialization: international evidence

Despite the benefits observed in specialized regions, numerous studies highlight the structural risks associated with dependence on a single industrial sector. Two emblematic international cases are particularly illustrative and serve as contrasts to Querétaro's experience:

Detroit (United States): the fragility of automotive mono-industry

Detroit, historically known as the "Motor City," depended heavily on the automotive industry throughout much of the twentieth century. However, extreme concentration in a single sector ultimately generated a fragile and poorly resilient economy in the face of global change. Academic research shows that the region experienced a profound industrial crisis when demand patterns shifted, international competition intensified, and major corporations reorganized production outside the region, leading to declining manufacturing output, massive job losses, and urban decay. This case demonstrates that automotive specialization, while capable of generating economic dynamism in certain periods, can result in severe regional crises when the dominant industry loses competitiveness or faces prolonged external shocks.

The Ruhr region (Germany): specialization and the need for productive reconfiguration

Germany's Ruhr region, traditionally a hub of heavy industry (including automotive and steel), has faced similar challenges of structural change. The literature on specialization and regional restructuring policies indicates that regions highly dependent on traditional industries—even in developed contexts—face adaptation problems and require diversification and industrial reconversion strategies to avoid prolonged decline. While some regions have successfully reconfigured through "smart specialization" policies emphasizing innovation, education, and technological diversification, others have experienced constrained growth by concentrating on industrial activities with declining global dynamism.

Productive specialization in Querétaro and its implications

Querétaro's decision to bet on the automotive industry must be interpreted within a regional development framework and global productive integration. However, the international experiences discussed above warn of the possibility that a "specialization trap" may limit growth options when the dominant sector faces structural difficulties or radical technological change, such as the transition toward electric vehicles and more complex supply chains.

In this regard, Viramontes Romero (2022) directly analyzes the current situation of micro, small, and mediumsized enterprises (MSMEs) in Querétaro's auto parts sector, identifying both their contributions to employment and regional economic activity and the limitations that restrict their full integration into global value chains. The author notes that although these firms constitute a key component of the local automotive ecosystem, their participation is largely concentrated in low value-added segments, with limited technological capacity and weak bargaining power vis-à-vis transnational corporations.

From this theoretical perspective, specialization poses a fundamental trade-off: maximizing current competitive advantages versus ensuring a diversified and adaptable productive base for the future. This dilemma is particularly relevant for export-oriented regions such as Querétaro, where integration into international markets amplifies both development opportunities and exposure to external risk.

DEVELOPMENT

Economic impact of the auto parts sector in Querétaro

The auto parts sector has consolidated itself as one of the fundamental pillars of the State of Querétaro's economy, both due to its direct contribution to state GDP and its integration into the automotive industry's global value chains. According to recent sectoral estimates, in 2024 Querétaro ranked as the fifth largest national producer of auto parts, with production value exceeding USD 9.6 billion, representing approximately 7.8% of national output (Mexico Now, 2024). This figure reflects the sector's magnitude within the national context and confirms the state's strategic role within the Bajío automotive corridor.

The economic weight of the automotive sector—within which auto parts constitute the dominant segment—is clearly reflected in its share of state GDP. Official data and specialized analyses indicate that by 2024 the automotive sector accounted for approximately 31.3% of Querétaro's GDP, equivalent to more than MXN 239 billion, making it the state's principal economic activity (Líder Empresarial, 2024). This high sectoral concentration explains why fluctuations in the automotive market have a direct impact on the state's overall economic performance.

From a foreign trade perspective, Querétaro's auto parts industry exhibits a strong export orientation. Transport equipment manufacturing—including auto parts—accounted for nearly 48% of state exports, with a value exceeding USD 8 billion in a recent year, with the United States as the primary destination (El Universal Querétaro, 2024). This high dependence on external markets reinforces competitiveness but also increases exposure to changes in international trade policy and external demand.

In terms of imports, the automotive and auto parts sector also shows strong dependence on foreign inputs, particularly high-technology components, specialized machinery, and intermediate materials. This pattern reflects the state's insertion into global value chains, where Querétaro primarily participates in manufacturing and assembly stages, with more limited presence in design, technological development, or the production of strategic components (Gereffi, 2018).

Business structure and employment generation

The auto parts ecosystem in Querétaro is composed of a large number of firms of varying sizes and levels of productive integration. It is estimated that approximately 972 companies linked to the automotive sector operate in the state, including Tier 1, Tier 2, and Tier 3 suppliers, as well as industrial services, logistics, and advanced manufacturing firms (Puerto Interior Guanajuato, 2025). Of these, roughly 376 correspond to manufacturing plants, evidencing a high level of industrial density.

This productive network has enabled the generation of a substantial volume of employment. According to recent estimates, the automotive sector in Querétaro generates more than 85,000 direct jobs, many associated with specialized manufacturing, engineering, and technical supervision activities (Neuron Business Media, 2024). These jobs tend to exhibit higher levels of formality and relatively higher wages compared to other sectors, contributing to improvements in certain labor welfare indicators.

Nevertheless, academic studies warn that the positive employment impact is not homogeneous across the sector.

Research on MSMEs in Querétaro's auto parts industry indicates that a significant proportion of these firms operate in low value-added segments, with limited technological capabilities and high dependence on contracts with large transnational firms, reducing their long-term stability and growth capacity (Viramontes Romero & Cabello, 2022).

Risks and academic critiques of automotive specialization

Despite the economic benefits described, the academic literature has articulated significant critiques of development models based on strong sectoral specialization. A first critique relates to the structural vulnerability faced by regional economies highly dependent on a single export sector. Rodríguez-Pose (2013) argues that such specialization reduces territories' adaptive capacity in the face of external shocks, such as global economic crises, technological change, or modifications to international trade rules.

In the automotive industry, these vulnerabilities are intensified by strong exposure to global corporate decisions and external trade policies. Studies on global value chains in Mexico indicate that although the automotive industry has boosted exports and employment, its productive linkages with the rest of the national economy remain limited, constraining spillover effects into other productive sectors (Crossa & Ebner, 2020).

A second academic critique points to the risk of crowding out productive diversification. By concentrating public resources, infrastructure, and human capital in a dominant sector, the development of other locally promising activities—such as knowledge-based services, digital technologies, or creative industries—may be inhibited (Campos-Vázquez & Campos-Ortiz, 2023). This phenomenon can generate a rigid economic structure that is poorly equipped to adapt to disruptive technological changes, such as the transition to electric vehicles or advanced automation.

Furthermore, research on industrial resilience indicates that regions highly specialized in automotive manufacturing may experience uneven recoveries from economic crises, depending on their degree of internal diversification and the strength of local firms (Rutherford, 2014). In this sense, Querétaro faces the challenge of balancing the current benefits of the auto parts sector with strategies that strengthen long-term economic resilience.

Overall, these analyses suggest that while the auto parts sector has been a key driver of Querétaro's economic growth, excessive dependence on this activity entails structural risks that must be considered in public policy formulation, particularly in a context of trade uncertainty, intensifying international competition, and accelerated technological transformation.

DISCUSSION

The results presented in the Development section confirm that the auto parts sector has been a fundamental engine of economic growth in the State of Querétaro, particularly in terms of employment generation, attraction of foreign direct investment, and export dynamism. However, when these findings are contrasted with the academic literature on regional development and productive specialization, relevant conceptual tensions emerge that allow for a critical assessment of the long-term sustainability of this model. From the perspective of global value chains, Gereffi (2018) argues that the integration of subnational regions into international production networks can generate accelerated growth, provided that mechanisms for technological upgrading and local capability building exist. In the case of Querétaro, the evidence shows successful integration into auto parts manufacturing, but predominantly in intermediate segments of the chain, with high dependence on imported inputs and external corporate decisions. This aligns with the observations of Crossa and Ebner (2020), who argue that Mexico's automotive industry has generated a "development mirage," increasing exports and employment without necessarily strengthening internal productive linkages or regional technological autonomy.

Rodríguez-Pose (2013), in turn, warns that highly specialized regions tend to exhibit lower resilience to external shocks, particularly when their productive structure depends on volatile international markets or the trade policies of core countries. This argument is especially relevant for Querétaro, given that a significant proportion of auto parts exports are destined for the United States and that the automotive sector is highly sensitive to regulatory, tariff, and technological changes. The reviewed literature suggests that while the sector's recent performance has been positive, its structural vulnerability could be amplified under scenarios of global slowdown, supply chain reconfiguration, or geopolitical tensions.

Additionally, Campos-Vázquez and Campos-Ortiz (2023) provide a critical perspective from regional analysis of the Bajío, noting that automotive sector expansion has tended to concentrate public and private resources, potentially limiting the development of other sectors with diversification potential. This phenomenon is evident in Querétaro, where priority given to the automotive industry has overshadowed more aggressive strategies to promote knowledge-based services, digital technologies, or cultural industries that could contribute to greater structural balance in the state economy.

Taken together, the theoretical discussion suggests that the Querétaro case reflects a classic regional development tension: short- and medium-term economic success derived from productive specialization versus the risks of sectoral dependence and structural fragility in the long term. The empirical evidence presented in this study confirms the relevance of these theoretical arguments and underscores the need to rethink the development model from a more diversified and resilient perspective.

CONCLUSIONS

The analysis of the auto parts sector in the State of Querétaro demonstrates that the state has successfully consolidated a strategic position within the national automotive industry and global value chains. The scale of production, export volumes, number of installed firms, and jobs generated confirm that this sector has been one of the principal drivers of state economic growth over the past two decades.

Nevertheless, the findings of this study also reveal that Querétaro's strong dependence on the auto parts sector— and on the automotive industry more broadly—entails significant structural risks. The high concentration of state GDP, manufacturing employment, and exports in a single sector increases the vulnerability of the local economy to external shocks, such as changes in international trade policy, fluctuations in global demand, accelerated technological transformations, or supply chain reconfigurations.

Moreover, the reviewed academic literature suggests that integration into global value chains does not, in itself, guarantee sustainable or inclusive development processes. In Querétaro's case, persistent challenges remain related to the limited participation of local firms in high value-added segments, dependence on imported inputs, and asymmetries between large transnational corporations and MSMEs in the auto parts sector (Viramontes Romero & Cabello, 2022). These conditions reinforce a growth model that, while successful in aggregate terms, exhibits long-term fragilities.

In this context, one of the main conclusions of this study is the need to advance toward a productive diversification strategy that complements—rather than replaces—the role of the automotive sector. A more decisive commitment to other sectors, such as knowledge-based services, the digital economy, cross-cutting technological innovation, high-value agro-industry, or creative industries, would help reduce sectoral dependence and strengthen the state's economic resilience.

Finally, the Querétaro case illustrates that the challenge does not lie in abandoning the automotive sector, but in redefining its role within a more balanced development strategy—one that prioritizes local innovation, strengthens domestic firms, and builds a diversified productive base capable of confronting future economic, technological, and geopolitical challenges.

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