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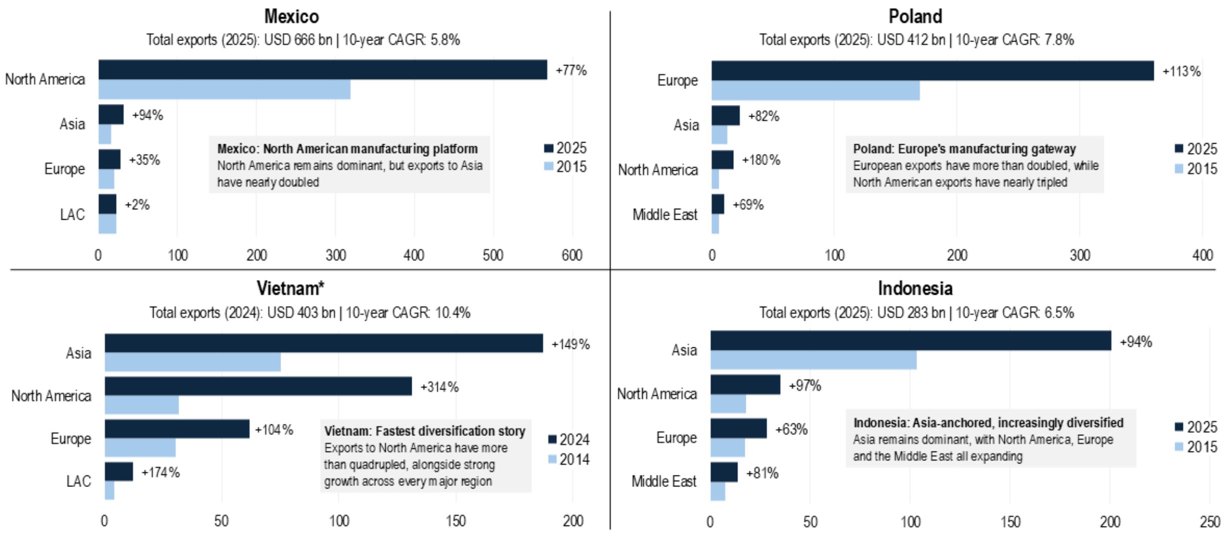
Emerging Manufacturing Hubs Are Expanding Beyond Their Regional Bases

Mexico, Vietnam, Poland and Indonesia remain anchored in their home regions, but exports to other major markets have expanded substantially over the past decade.

Selected Countries: Four Largest Export Regions, USD bn (2015 & 2025)



Note: *Vietnam data is for 2014 and 2024. LAC – Latin America and the Caribbean. Source: UN Comtrade, Trade Map, ANDAMAN PARTNERS Analysis

Mexico, Poland, Vietnam and Indonesia are becoming much larger pieces of the global manufacturing map. Together, the four now export roughly USD 1.8 trillion annually. Mexico leads at USD 666 billion, followed by Poland at USD 412 billion, Vietnam at USD 403 billion and Indonesia at USD 283 billion.

Over the past decade, their total exports have grown at annual rates ranging from 5.8% in Mexico to 10.4% in Vietnam. What makes the shift particularly interesting is that growth is spreading beyond each country's traditional regional base.

Vietnam's exports to North America have risen 314% over the decade, while its exports to Asia are up 149%. Poland's exports to North America have increased 180%, even as Europe remains overwhelmingly its largest market. Mexico remains deeply tied to North America, where exports have grown 77%, while its exports to Asia have nearly doubled. Indonesia tells a similar story from an Asian base, with exports to North America up 97% and to the Middle East up 81%.

The result is a broader network of manufacturing platforms with different geographic strengths. For companies, that creates more options for sourcing, production and market access across North America, Europe and Asia. Global supply chains are becoming more distributed, but regional anchors still matter. The emerging winners are increasingly those that can combine a strong home-region position with expanding access to markets further afield.

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