

Oportunidades de Nearshoring en México



United States' Biggest Exports

Total Value of U.S. Exports by Country



Note: This visualization shows countries where the U.S. has \$1 billion or more in exports.

How to read this map: Size and color of the countries correspond to the value of U.S. exports to those countries. Countries appear bigger and darker as the value of U.S. exports to those countries is higher. E.g. Canada.

Article & Sources:
<https://howmuch.net/articles/us-exports-imports-trade-balance>
 United States Census Bureau- <https://www.census.gov/>

United States' Biggest Imports

Total Value of U.S. Imports by Country



Note: This visualization shows countries from where the U.S. imports \$1 billion or more of goods.

How to read this map: Size and color of the countries correspond to the value of U.S. imports from those countries. Countries appear bigger and darker as the value of U.S. imports from those countries is higher. E.g. China.

Article & Sources:
<https://howmuch.net/articles/us-exports-imports-trade-balance>
 United States Census Bureau - <https://www.census.gov/>

Geopolitical Rivalry: US\$105 trn Global GDP

China as USA peer competitor,
72.1% of US GDP

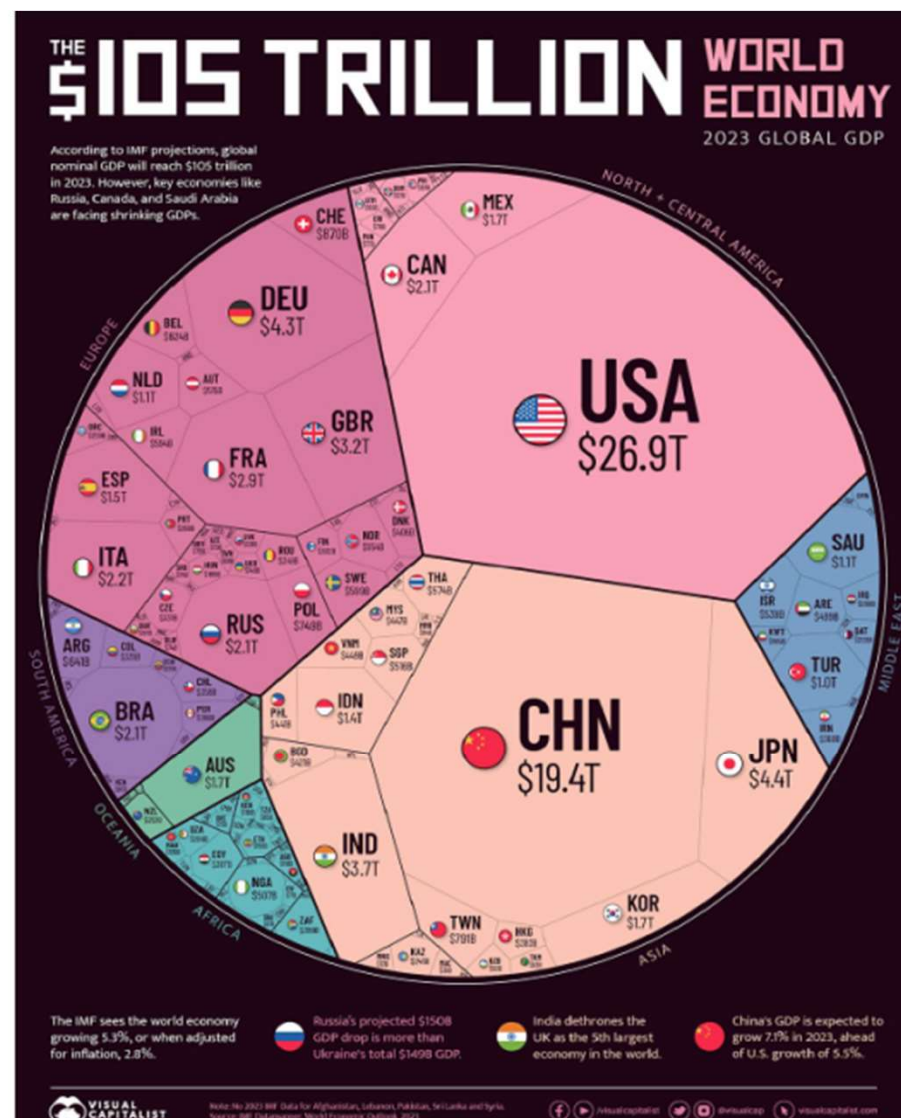
EU (\$17.1)+ Japan (\$4.4) next
tier as net surplus areas.

Rise of \$Trillion class powers:

India - \$3.7 trn

Brazil & Russia - \$2.1 trn each

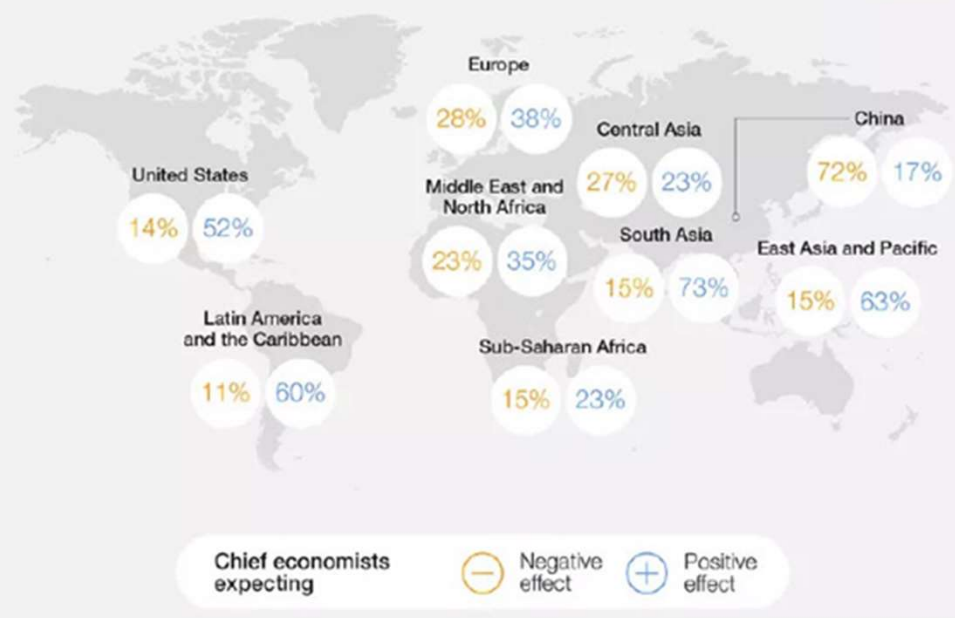
Korea, Australia, Mexico -
\$1.7 each



Industrial Policy Means More Protectionism, Intervention, Less Free Market Competition

Economic impact of supply chains' changes

WORLD ECONOMIC FORUM



Source: WEF. 2023

New era of industrial policy

WORLD ECONOMIC FORUM

Over the next three years, chief economists expect the recent trend of stronger industrial policy to:



Changing face of globalization

WORLD ECONOMIC FORUM

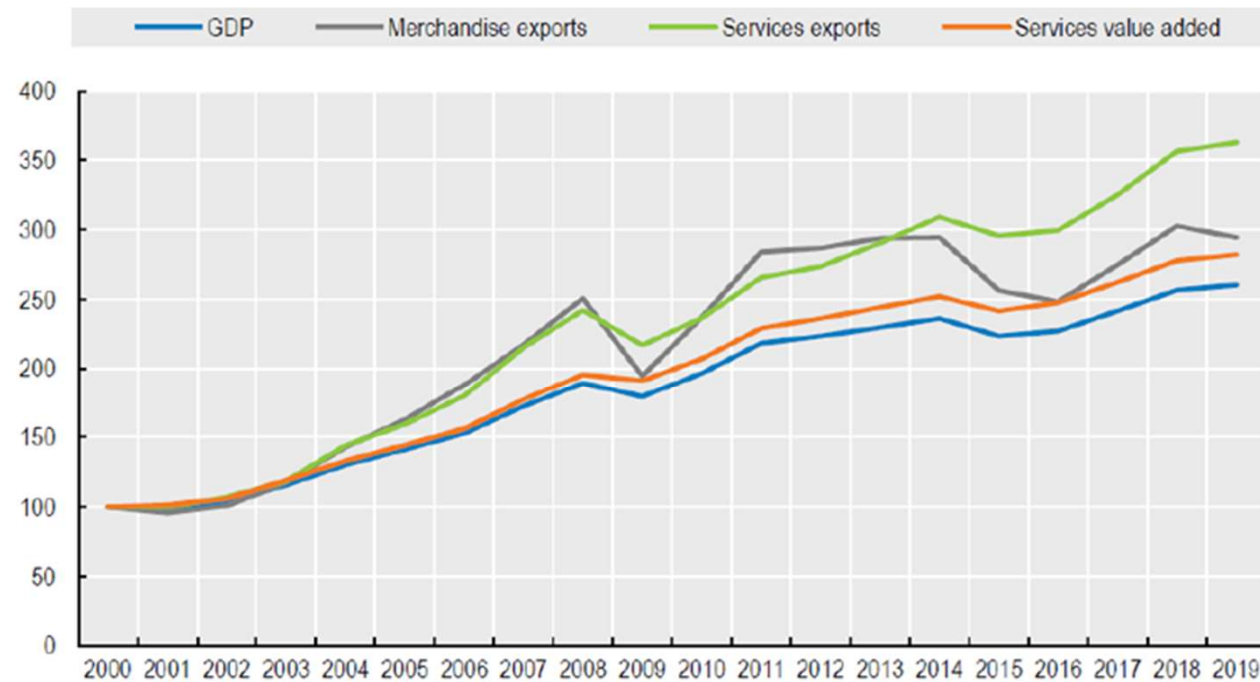
100% expect changes in the structure of global supply chains over the next three years

Corporate strategies expected to shape global supply chains over the next three years:



Asia shifting from Global Factory to Global Services Provider – as digital cross-border services grow faster than merchandise trade (Richard Baldwin)

Figure 1. Global services output and services exports



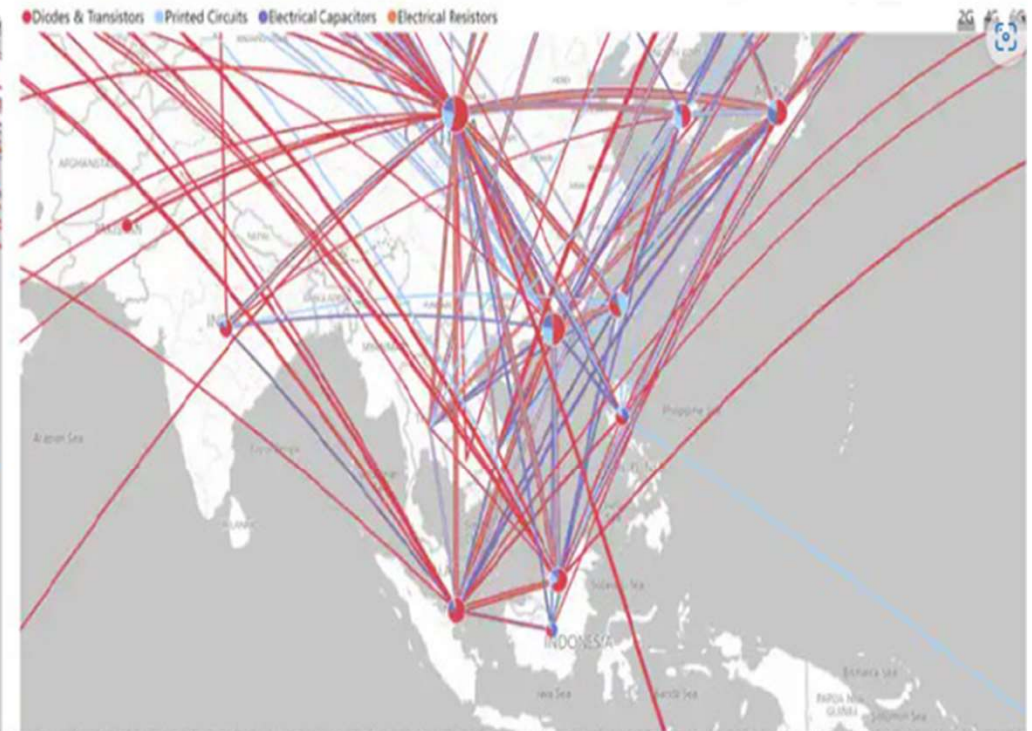
East and SE Asia region is biggest link in global electronic components trade

Global trade in electronic components (Q2 2021)



Source: IHS Markit *Global Trade Atlas*(GTA). Flows above USD 25 million in Q2 2021.

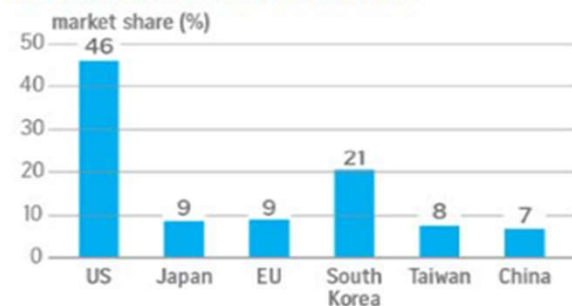
Global trade in electronic components (Q2 2021) Zoom into East & Southeast Asia



Source: IHS Markit *Global Trade Atlas*(GTA). Flows above USD 25 million in Q3 2021.

73% chips made in Asia: 22.5% value contribution from ASEAN (SIA/McKinsey)

GLOBAL INDUSTRY OVERVIEW



GLOBAL MANUFACTURING CAPACITY

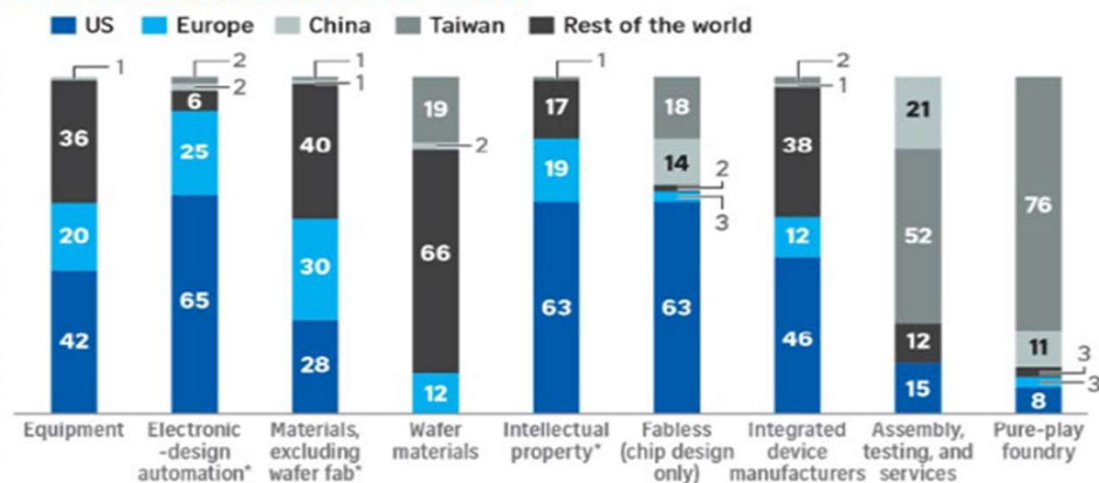


ASEAN'S INVOLVEMENT IN THE GLOBAL VALUE CHAINS

• Second-largest semiconductor exporter globally, with a **22.5%** share of global semiconductor exports

• **Five** Asean states are among the world's top 15 semiconductor exporters

2020 SALES ALONG THE VALUE CHAIN



NOTE: *Based on 2018 sales

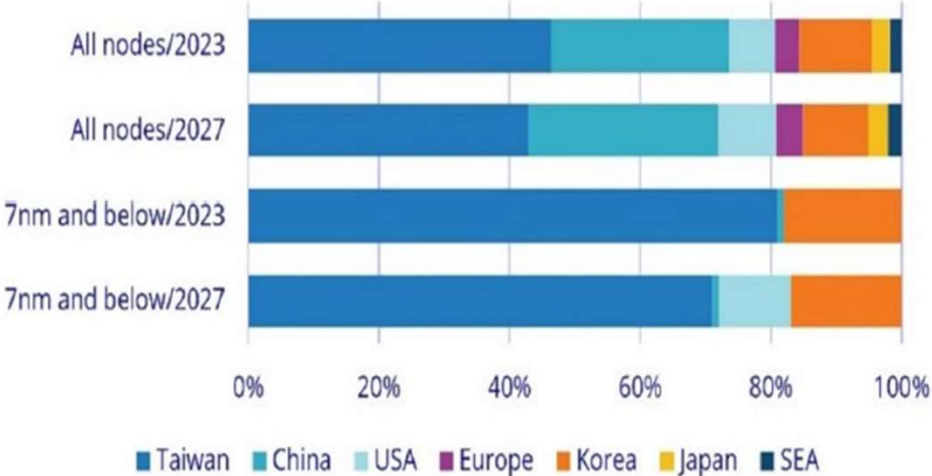
SPREAD OF SPECIALISATION IN THE SEMICONDUCTOR VALUE CHAIN ACROSS ASEAN



Sources: SEMICONDUCTOR INDUSTRY ASSOCIATION, BOSTON CONSULTING GROUP, MCKINSEY & COMPANY, EY STRAITS TIMES GRAPHICS

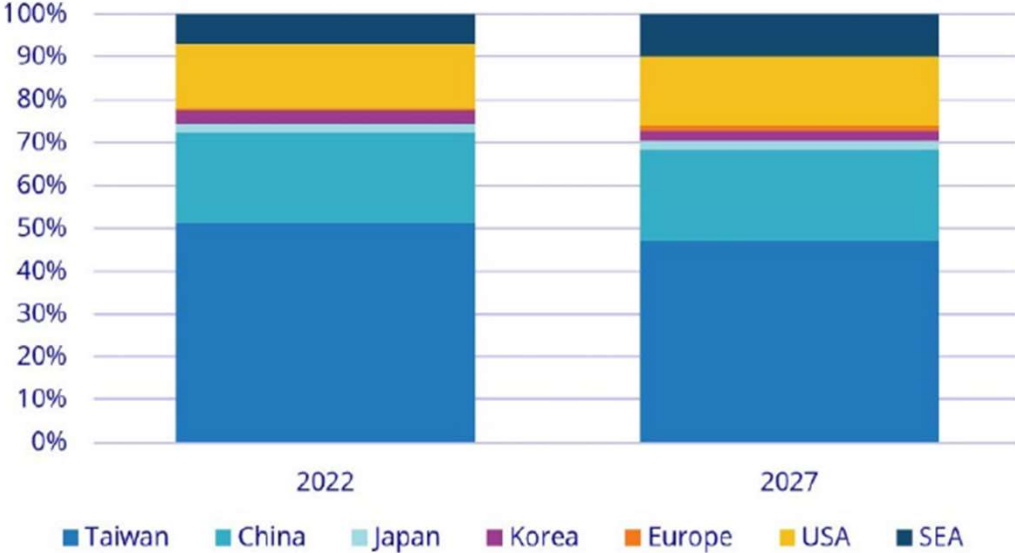
Southeast Asia (Malaysia and Vietnam) will reach 10% of global semiconductor share by 2027

Worldwide Semiconductor Foundry Market by Location, 2023-2027



Source: IDC 2023

Worldwide Semiconductor Assembly and Test Market Share by Location, 2022-2027



Source: IDC 2023

Asia has 6-7% capacity growth: 14% of EVs

Global semiconductor chip shortage factors across metrics

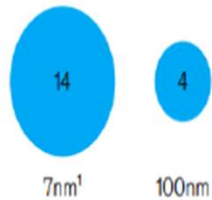
Global chip revenue, % change



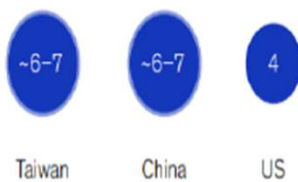
Global chip CAPEX for FABs, % change



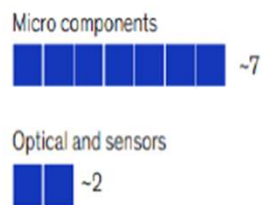
Production growth 2022-26 by node size, % CAGR



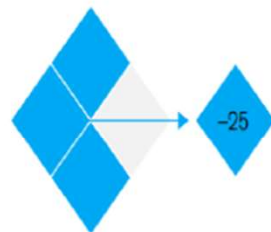
Production growth 2022-26 by geography, % CAGR



Lead times 2022-26 by device type, months



Capital spending for memory market 2022-26, % change

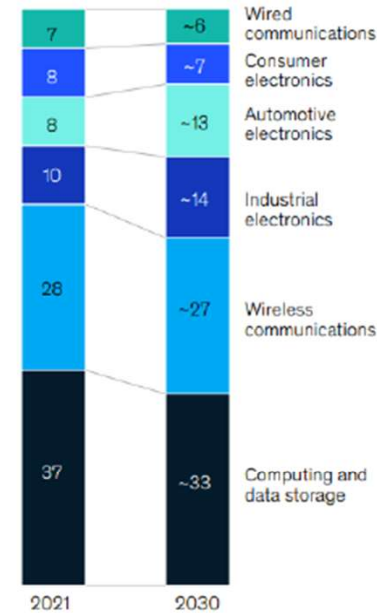


¹Nanometer.

The fastest demand growth will be in automotive and industrial sectors.

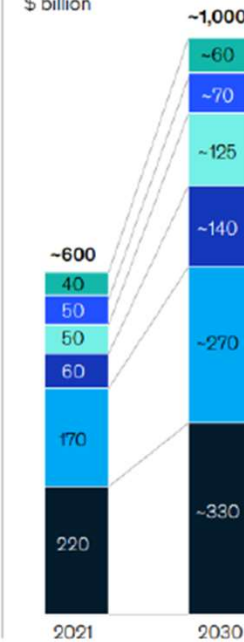
Global semiconductor market 2021-30

Market by vertical, % share

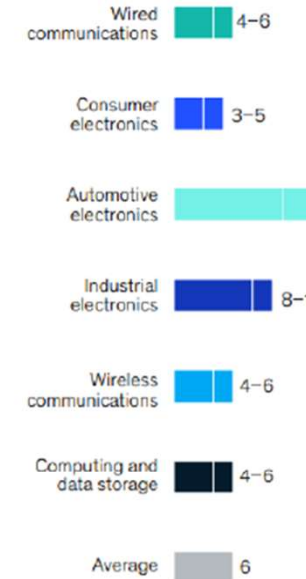


McKinsey & Company

Market by vertical, \$ billion

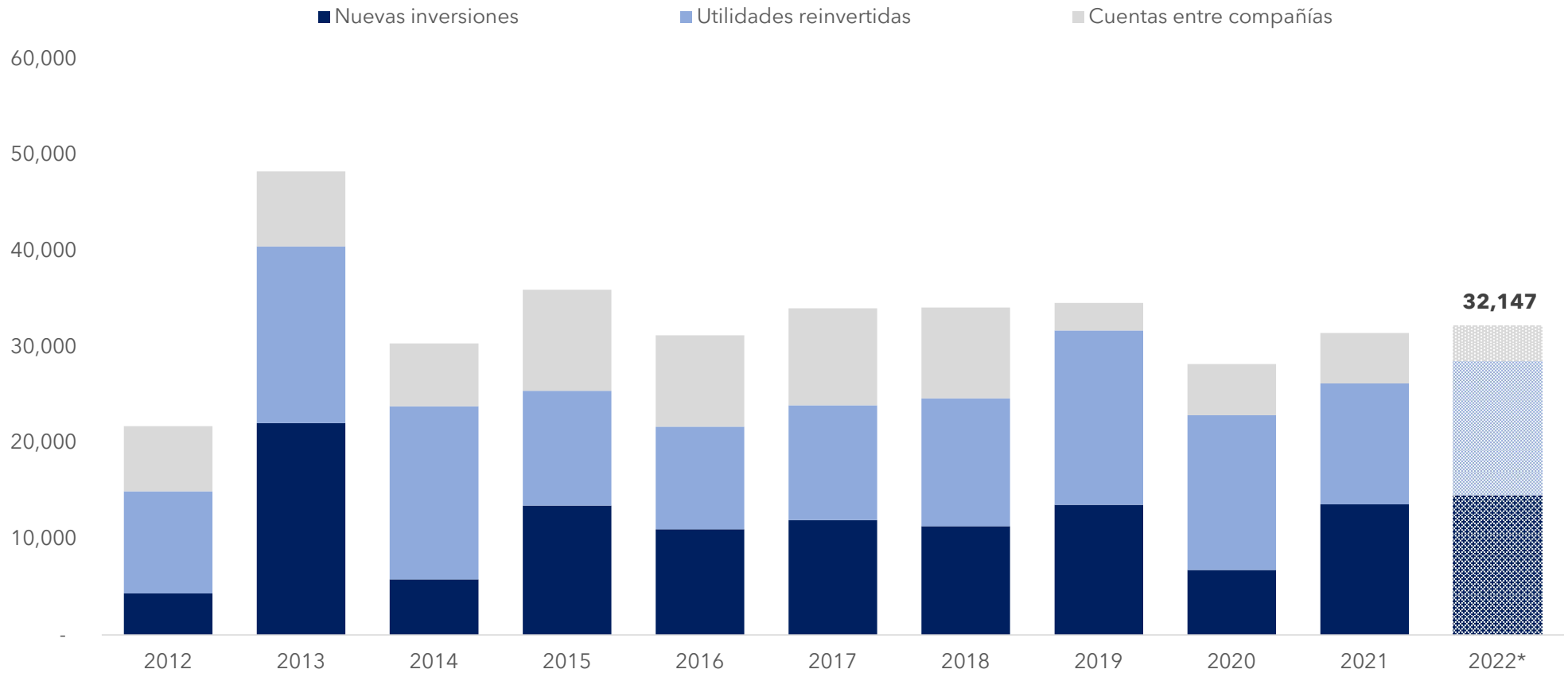


2021-30 % CAGR



Inversión Extranjera Directa

IED total, en millones de USD



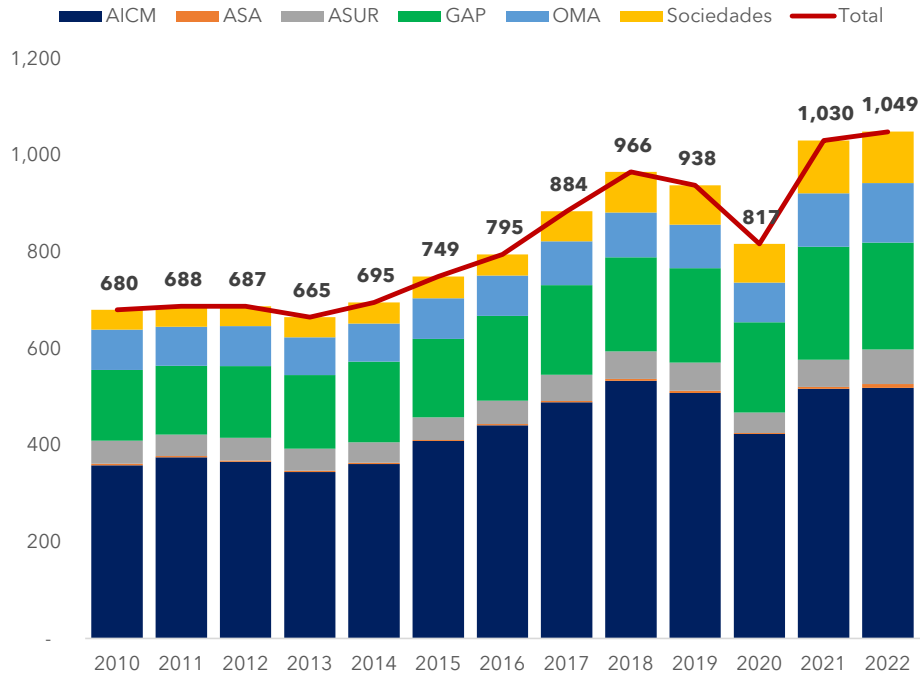
Fuente: Banco de México

* Datos hasta el 3T2022.

Carga Aeroportuaria

Evolución de la carga aeroportuaria por Grupo Aeroportuario

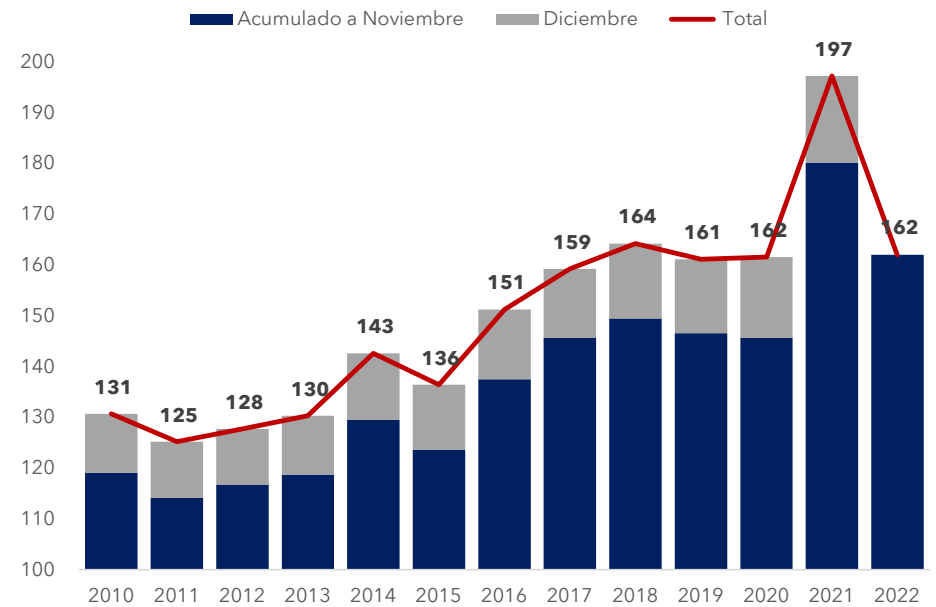
Miles de toneladas, 2010-Noviembre 2022



Fuente: Agencia Federal de Aviación Civil

Evolución de la carga en el Aeropuerto de Guadalajara

Miles de toneladas, 2010-Noviembre 2022

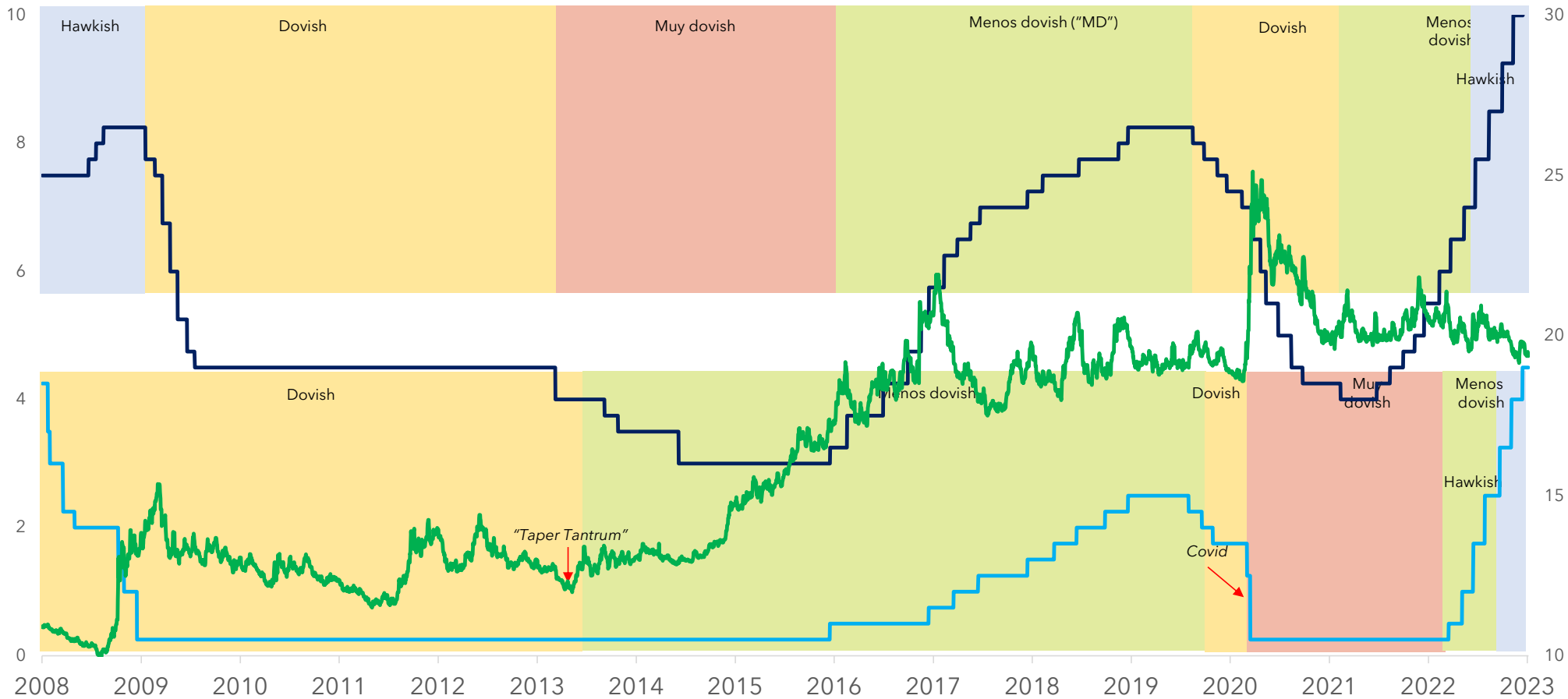


Fuente: Agencia Federal de Aviación Civil

Política monetaria y tipo de cambio

Tasas de referencia, en porcentajes. Tipo de cambio Dólar-Peso mexicano

FED Banxico USDMXN

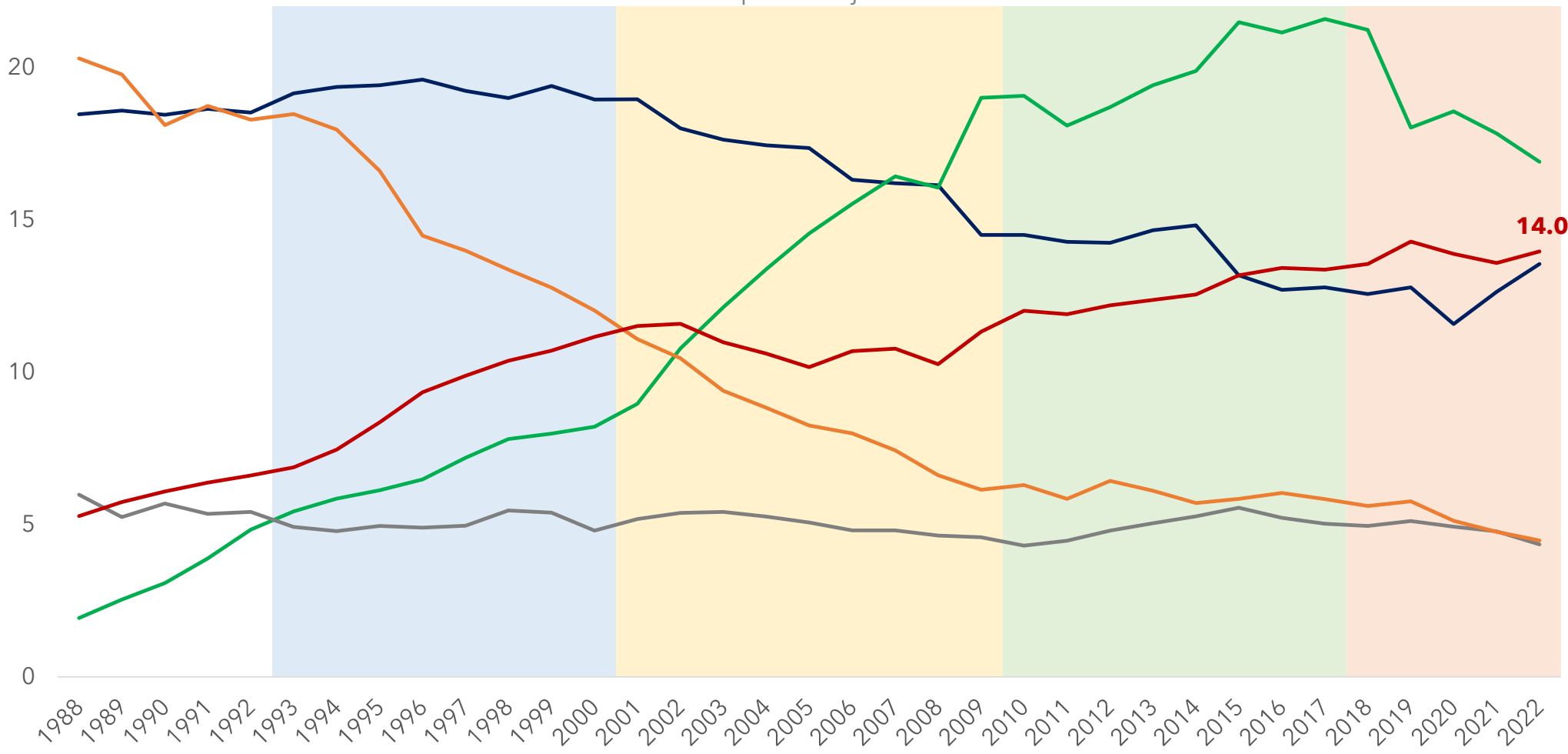


Fuente: FRED, Banco de México, CMM

13 Al 4 de enero

Participación de mercado en Estados Unidos

Participación en las importaciones, top 5 países
En porcentaje

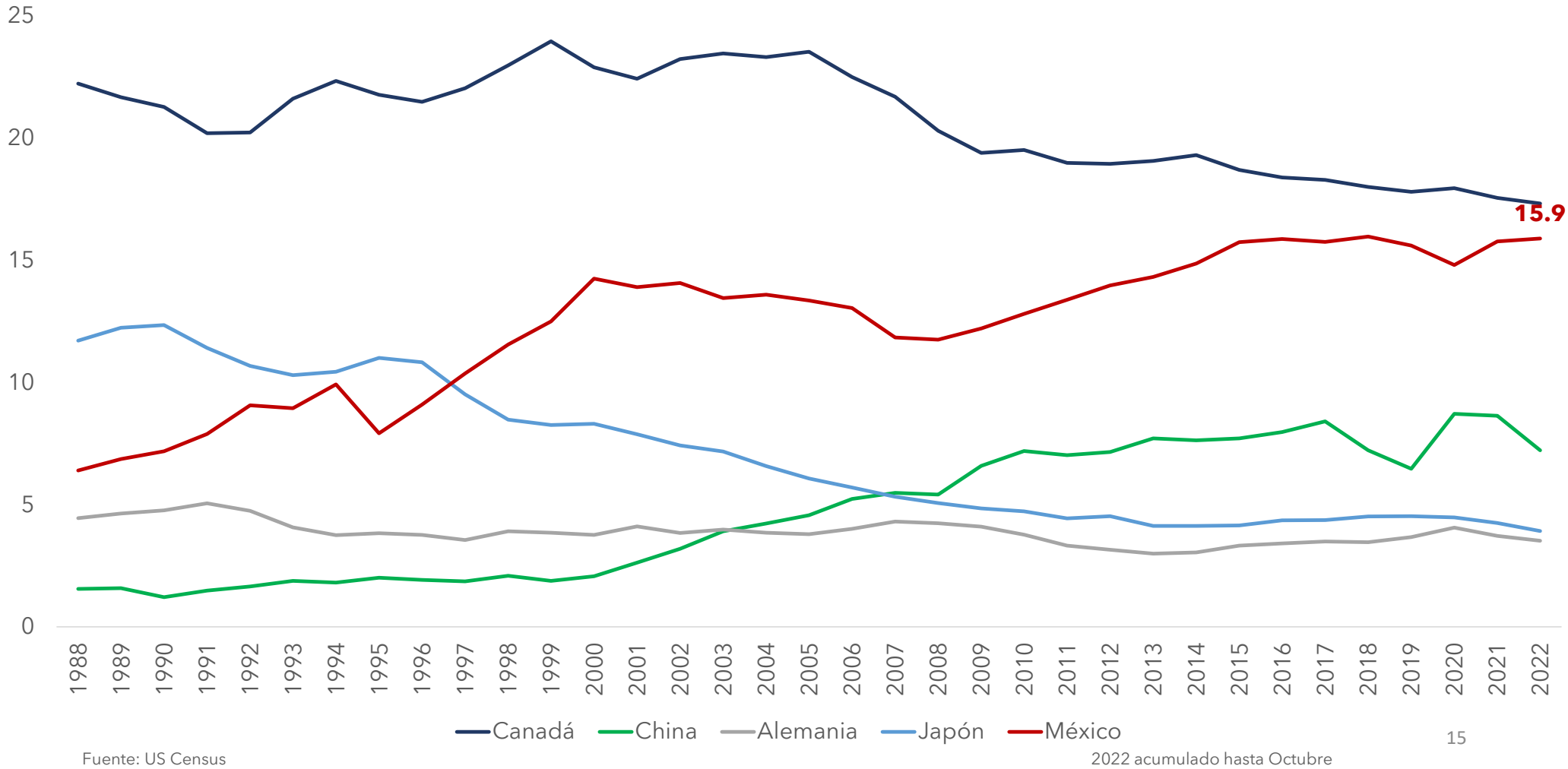


Fuente: US Census

2022 acumulado hasta Octubre

Principales destino de exportación de Estados Unidos

Participación en las exportaciones, top 5 países
En porcentaje

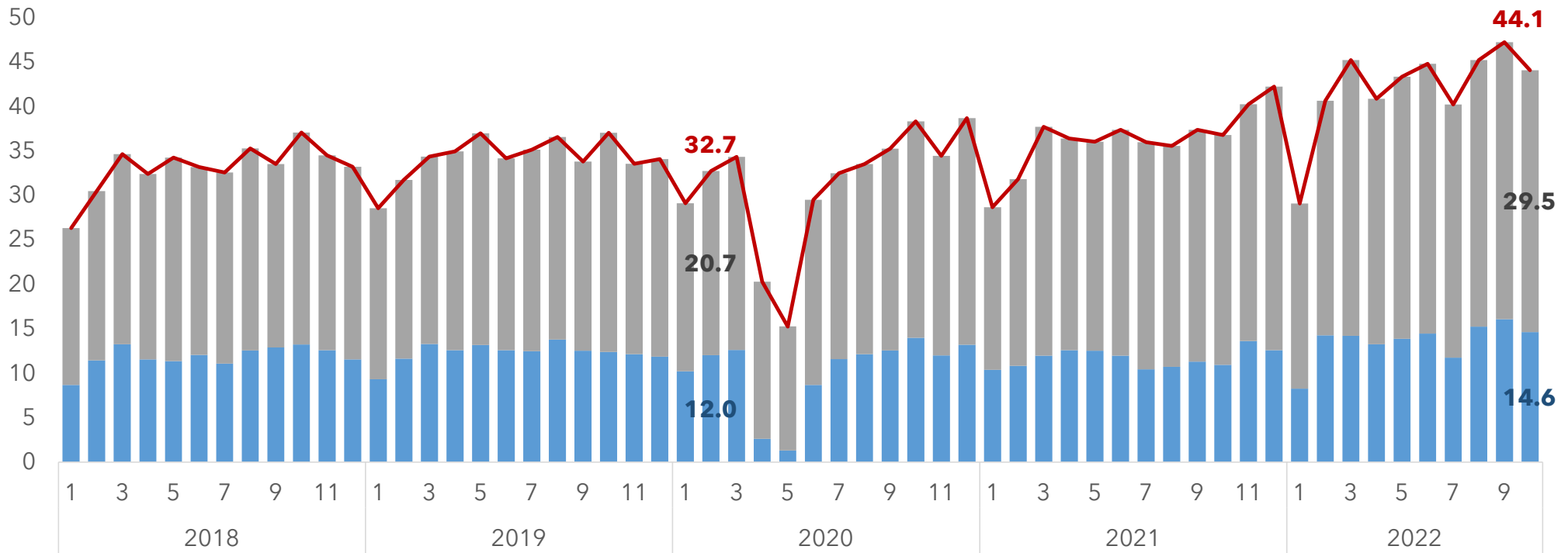


Fuente: US Census

Nivel histórico de las exportaciones manufactureras

Exportaciones manufactureras (miles de millones de dólares)

■ Industria automotriz y de autopartes ■ Otros — Total manufactura



Fuente: INEGI

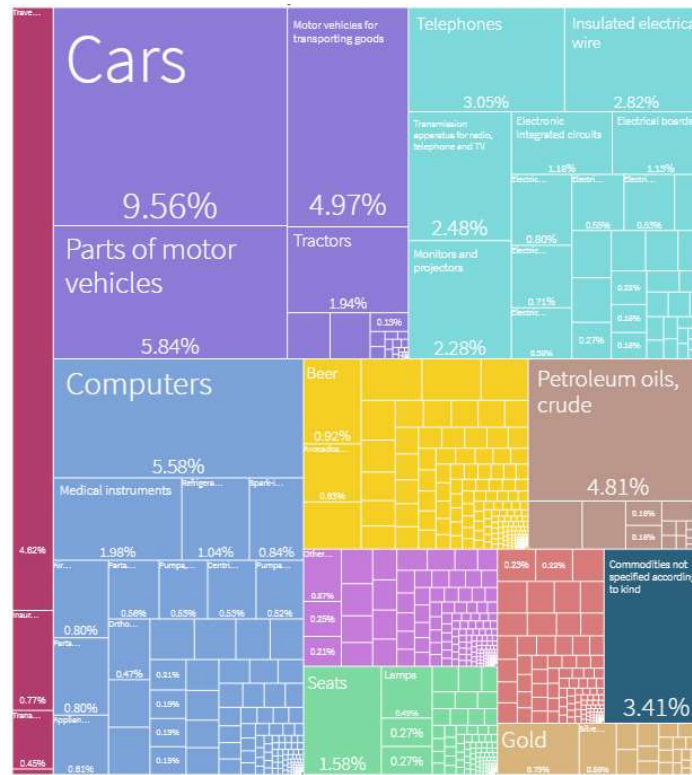
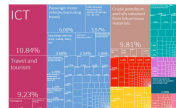
Octubre

México es más complejo de lo que se piensa...

Exportaciones 1982
\$ 28.3 B

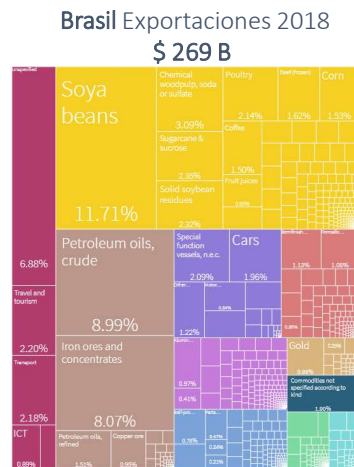
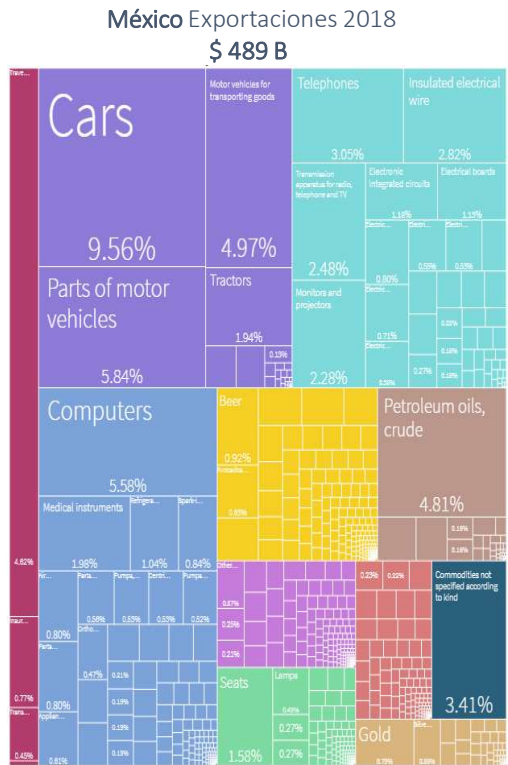


Exportaciones 1993
\$ 66.9 B
2.4 veces



Exportaciones
2018
\$ 489 B
17.3 veces

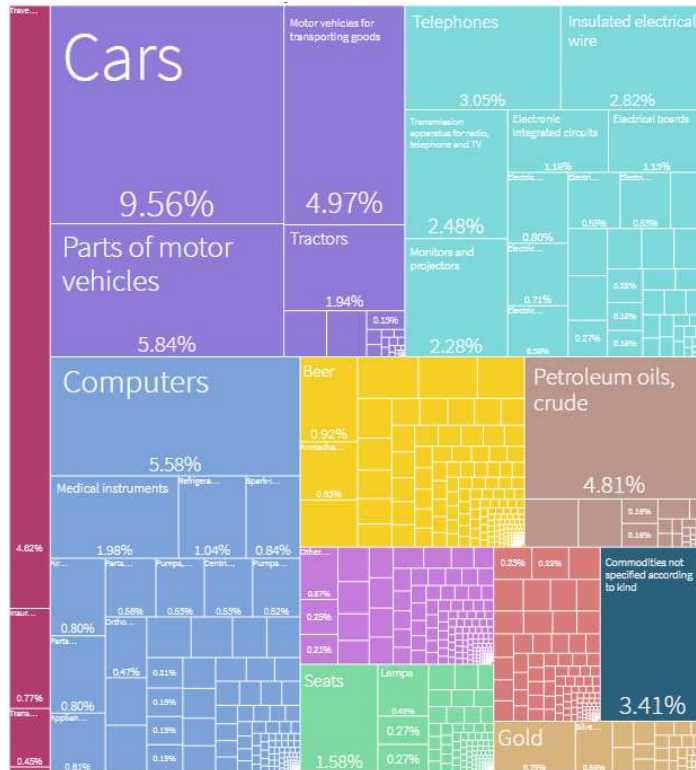
Más complejo que sus pares...



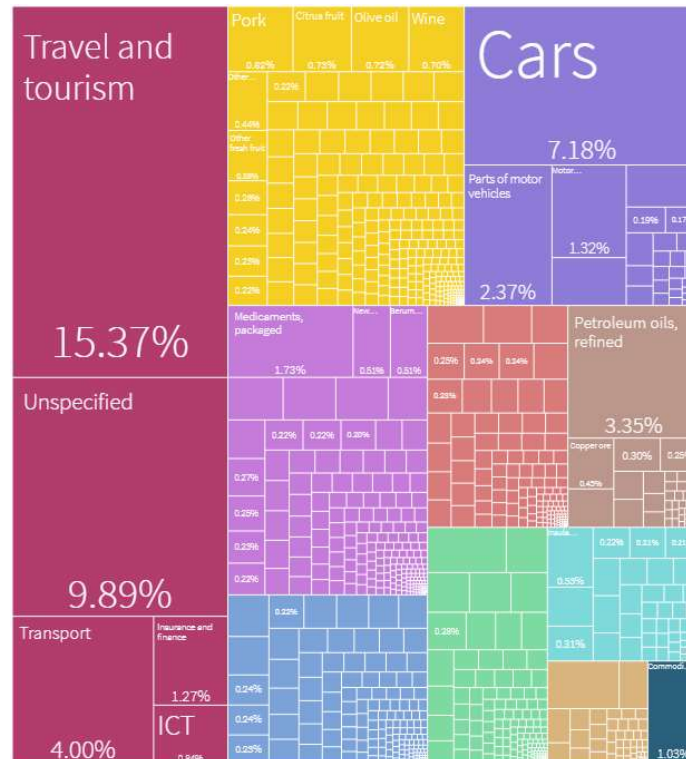
Fuente: *Atlas of Economic Complexity*, Harvard University

... y tan complejo como España

Exportaciones México 2018
\$ 489 B



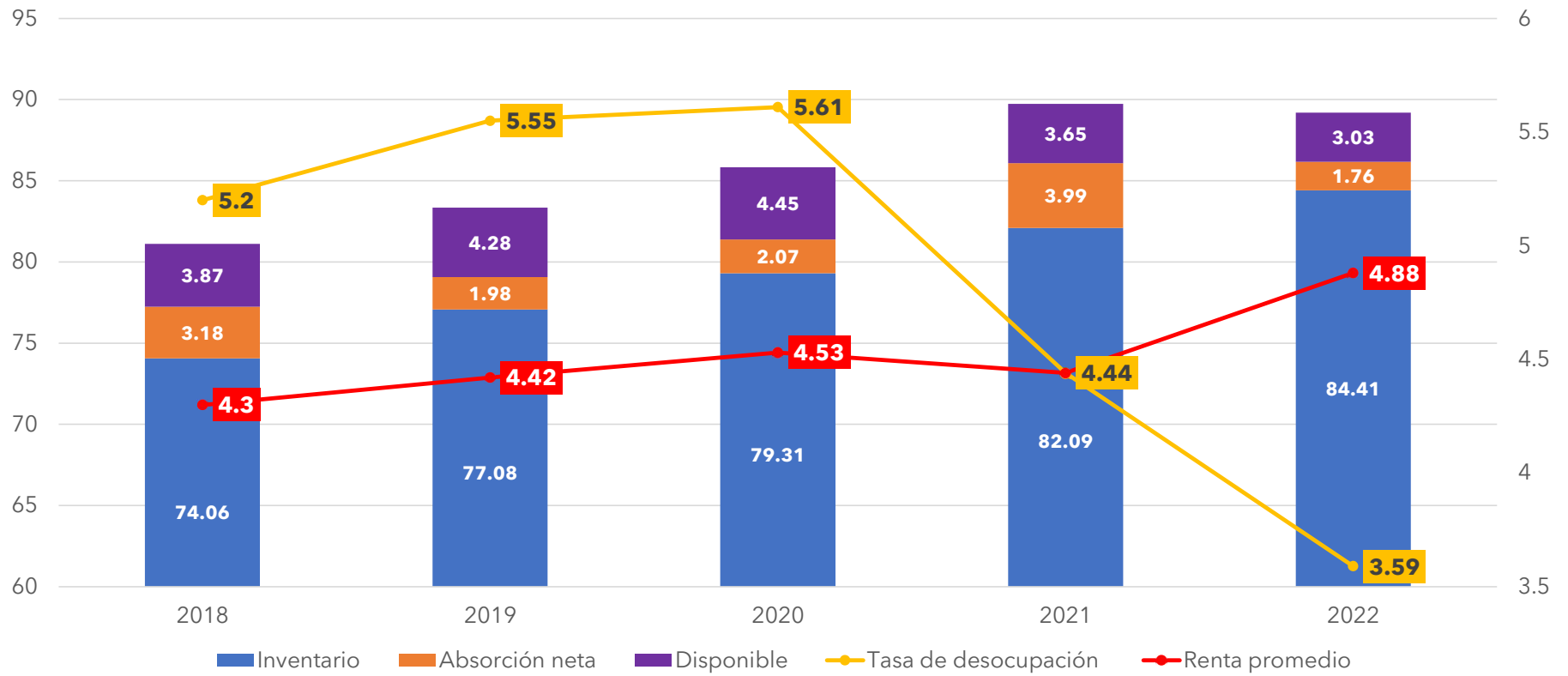
Exportaciones España 2018
\$ 479 B



Fuente: *Atlas of Economic Complexity*, Harvard University

Nearshoring

Potencial para México



Fuente: JLL Mexico Industrial Outlook 2022

TMEC - Oportunidades para fortalecer las cadenas de suministro

Incentivos para la adquisición de vehículos eléctricos e híbridos de Norteamérica en Estados Unidos

- **Crédito Fiscal** a 10 años incluido en **Ley de Reducción de la Inflación** (agosto 2022):
 - Vehículos usados hasta 4,000 dólares
 - Vehículos nuevos hasta 7,500 dólares

Producción de chips en América del Norte

- ***Chips and Science Act*** y ***Chips for America Strategy*** canalizan 50 mil millones de dólares para la producción de chips en Estados Unidos
- **Diálogo Económico de Alto Nivel entre Estados Unidos y México** (8 de septiembre de 2022): compromiso de trabajar en la identificación de oportunidades de inversión privada en la producción de chips, incluidos los insumos

Gracias...



JALISCO ROAD INFRASTRUCTURE

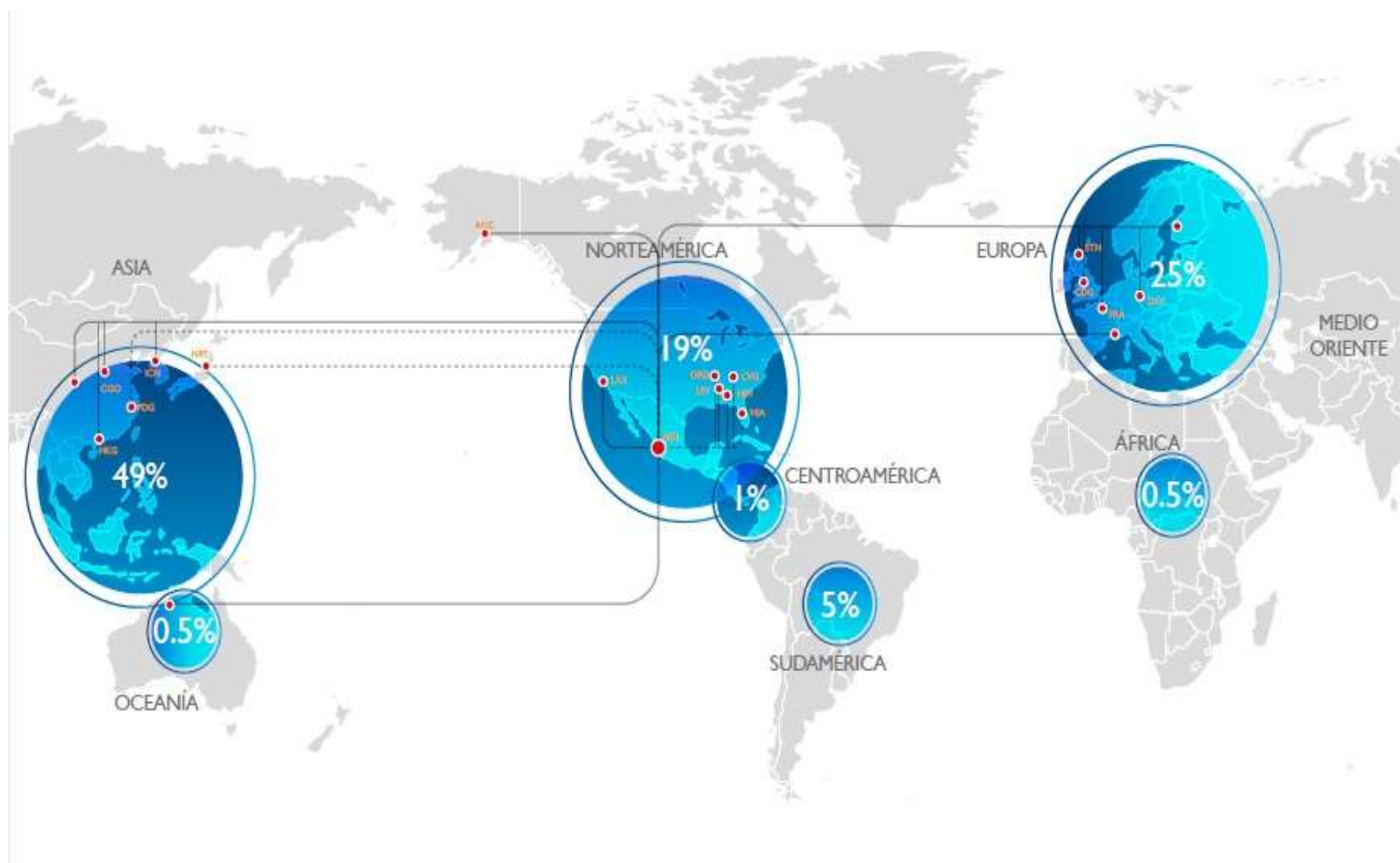


DISTANCES

FROM:	TO:	KM:
GUADALAJARA	AGUASCALIENTES	225
GUADALAJARA	CD. JUAREZ	1,520
GUADALAJARA	NUEVO LAREDO	977
GUADALAJARA	MEXICO CITY	546
GUADALAJARA	MANZANILLO	296
GUADALAJARA	NOGALES	1,715
GUADALAJARA	MONTERREY	740
GUADALAJARA	TAMPICO	750
GUADALAJARA	TEPIC	227
GUADALAJARA	VERACRUZ	775



GDL WW CARGO TRADE



JALISCO AIR-CARGO

USA

63 WEEKLY FREQUENCIES

- FedEx
- ABX cargo
- Cargo Lux
- Atlas air
- Mass Air
- DHL
- Aerounion
- UPS

ASIA

14 WEEKLY FREQUENCIES

- Korean Air
- Cathay Pacific
- Qatar Cargo

EUROPE

7 WEEKLY FREQUENCIES

- Air france
- Lufhtansa
- Panalipina
- Cargo Lux

CENTRAL AMERICA

7 WEEKLY FREQUENCIES

- Copa Airlines

91 WEEKLY FREQUENCIES

1ST IN VOLUME 2ND IN INTERNATIONAL OPERATIONS

MANZANILLO PORT SHIPPING CONNECTIONS



OCEAN NETWORK EXPRESS SHIPPING MEXICO



JALISCO HIGH TECH ECOSYSTEM





GUADALAJARA LOGISTIC POLE FOR 56% OF THE TOTAL COUNTRY AGROPECUARY



State	(Thousand of Tons)
Aguascalientes	2,126.20
Colima	3,181.57
Durango	7,170.94
Guanajuato	8,023.21
Jalisco	43,423.12
Michoacán	202,253.79
Nayarit	6,163.71
Sinaloa	11,869.93
Zacatecas	7,936.74
Total NW	292,149.21
% of Mexican NW States vs. National Output	56 %

PHARMA

INTERNATIONAL



NATIONAL



JALISCO COSMETIC & PERSONAL CAREA

Mexico is ranked in the **top 10 markets** in the world for cosmetics and personal care products, and it continues to be the **second-largest market** for beauty products in Latin America.

IN JALISCO

OXITENO
Evolution by chemistry
Manufacturing of specialized chemical products for beauty sector.

AIER
POR UN MUNDO MÁS LIMPIO Y SUSTENTABLE
Manufacturing Cleaning products for home with brands such as Cloralex and Pino!.

KOO
Chemical for home cleaning products.

MANUFACTURING PLANTS



JALISCO PLASTIC SECTOR

JALISCO HOLDS NATIONAL LEADERSHIP



759 Companies
25,000 Employees

Participation in
different areas of the
industry

AUTOMOTIVE

AEROSPACE

FOOD

PHARMACEUTICAL

AGROINDUSTRIAL

AERONAUTICAL

ELECTRONICS

CONSTRUCTION





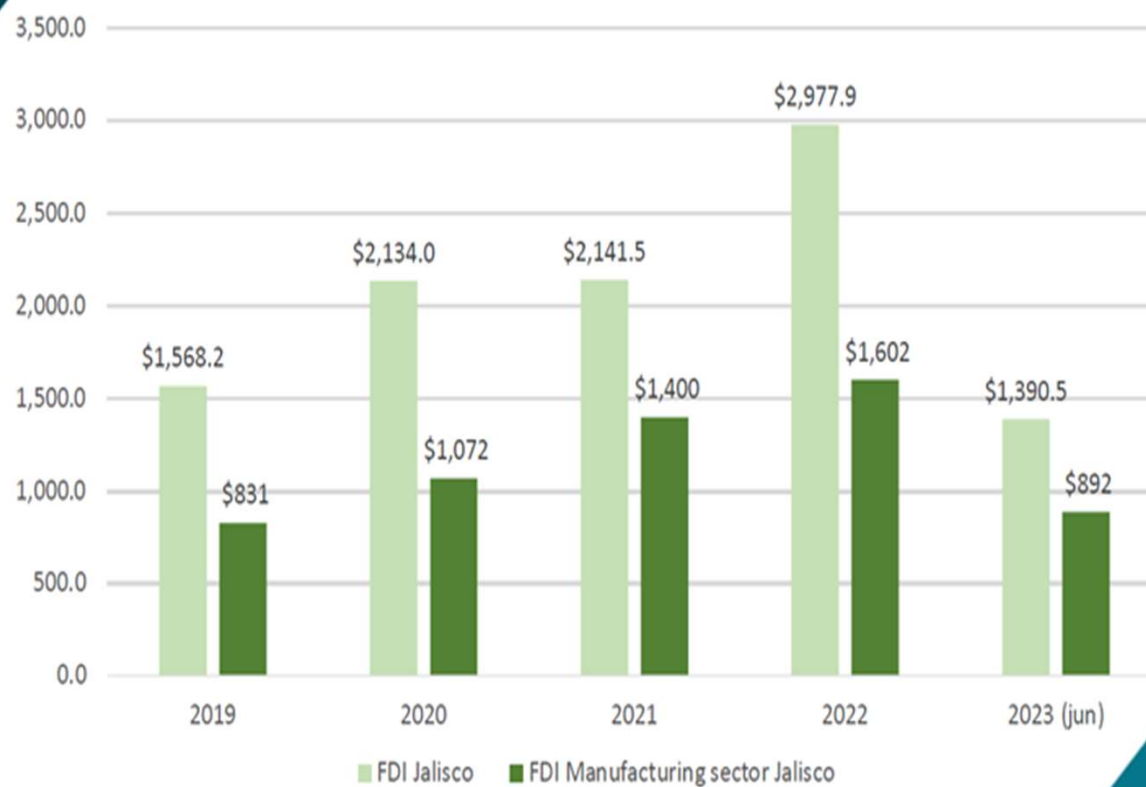
GDL TOTAL CARGO TRADE

YEAR	2019	2020	2021	2022
GRAN TOTAL	148,400 TONS	153,000 TONS	185.000 TONS	175,000 TONS



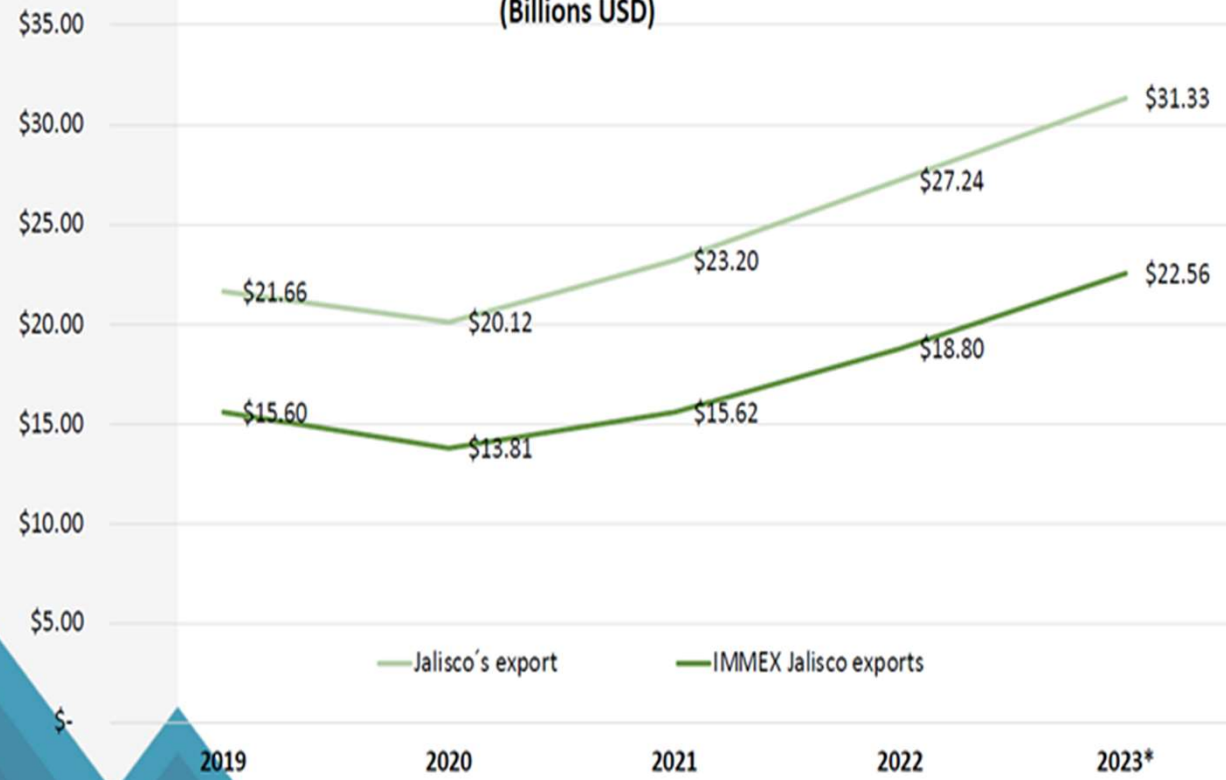
BUILDING THE FUTURE
OF JALISCO

FDI in Jalisco (2019-2023)



Source: index Occidente with Ministry of Economy data.

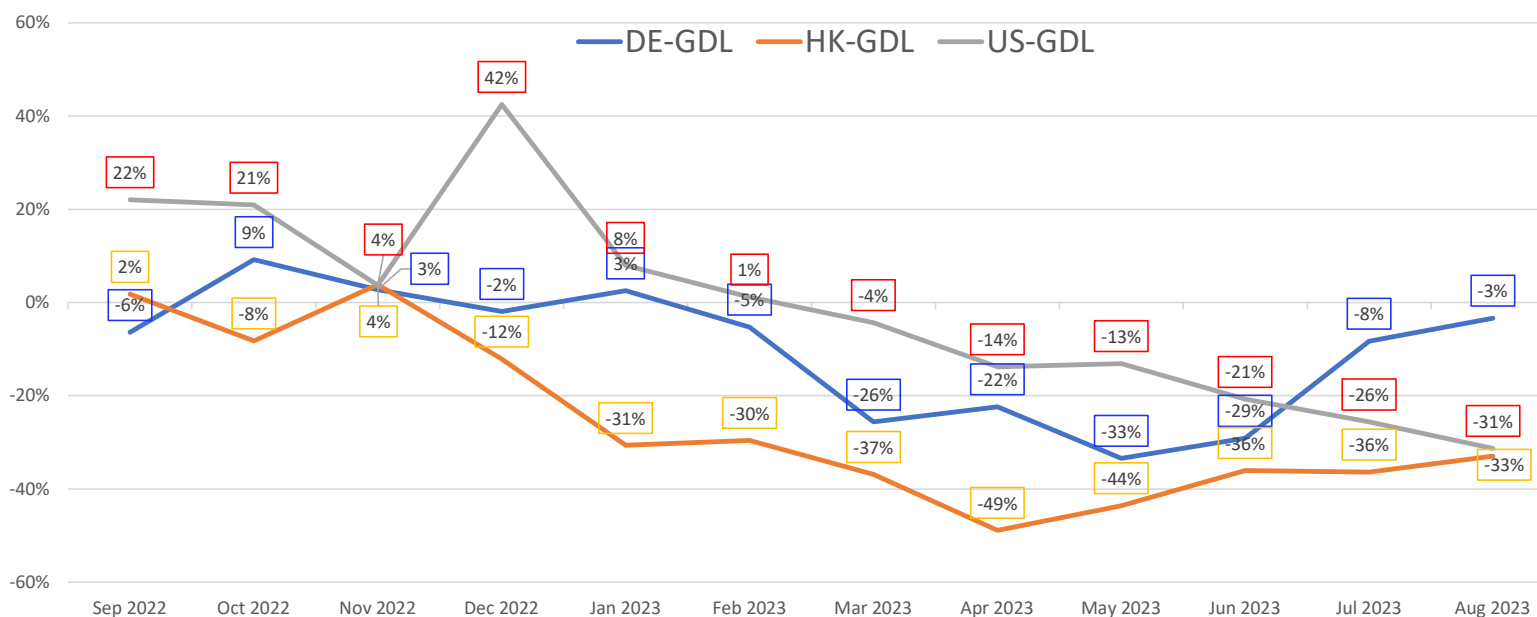
Jalisco's exports evolution 2017-2023* (Billions USD)



Source: index Occidente with INEGI data, 2023 estimated.

Profundizando en las importaciones de GDL

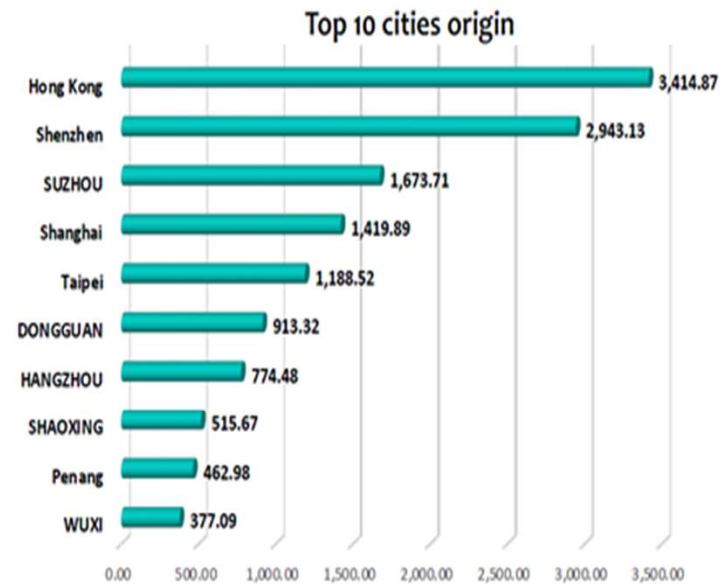
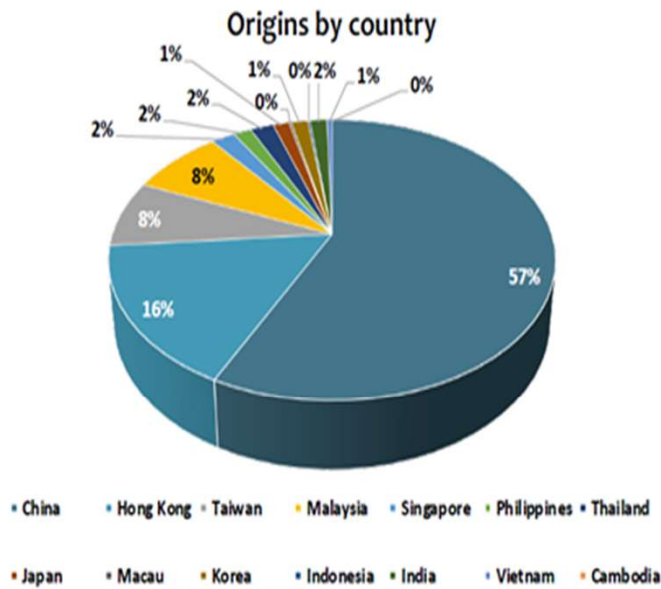
3 principales pares de mercados de importación de GDL en % Cambio de tasas interanual (12 meses consecutivos)



Imports from Asia to Guadalajara High-Tech industry



Tons annually imported from ASIA: 22,843

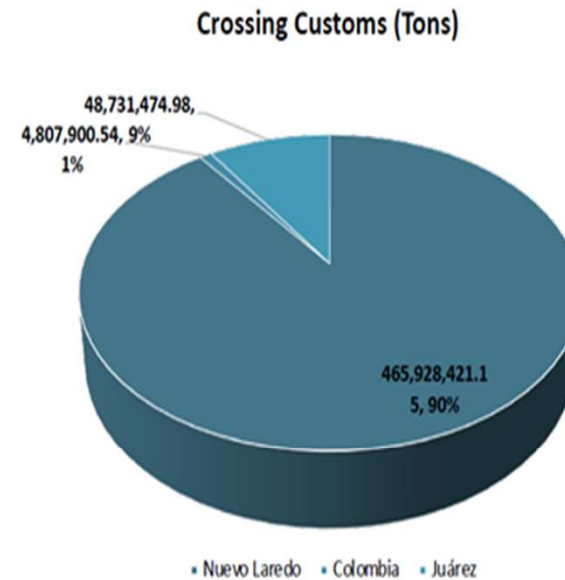
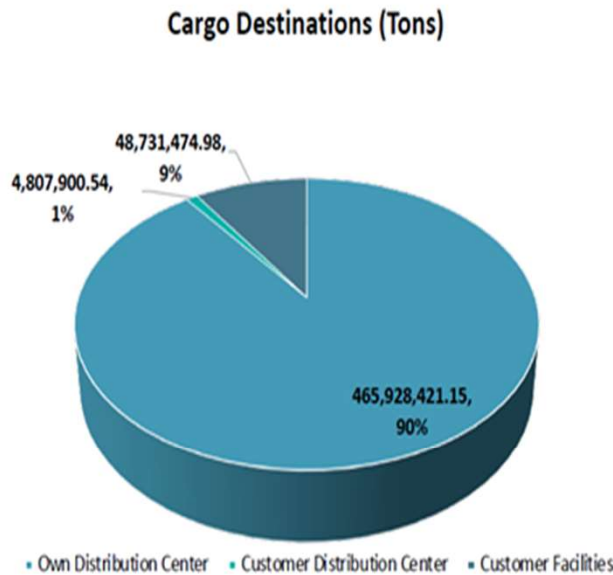


Source: index Occidente direct survey top Guadalajara exporters 2023.

Exports from Guadalajara to USA High-Tech industry



Tons annually exported to USA: 519 Millions



100% is FTL CARGO

Source: index Occidente direct survey top Guadalajara exporters 2023.

Top ten Routes by air cargo transported in International Regular Service

(Thousands of Tons)

Jan-Jun



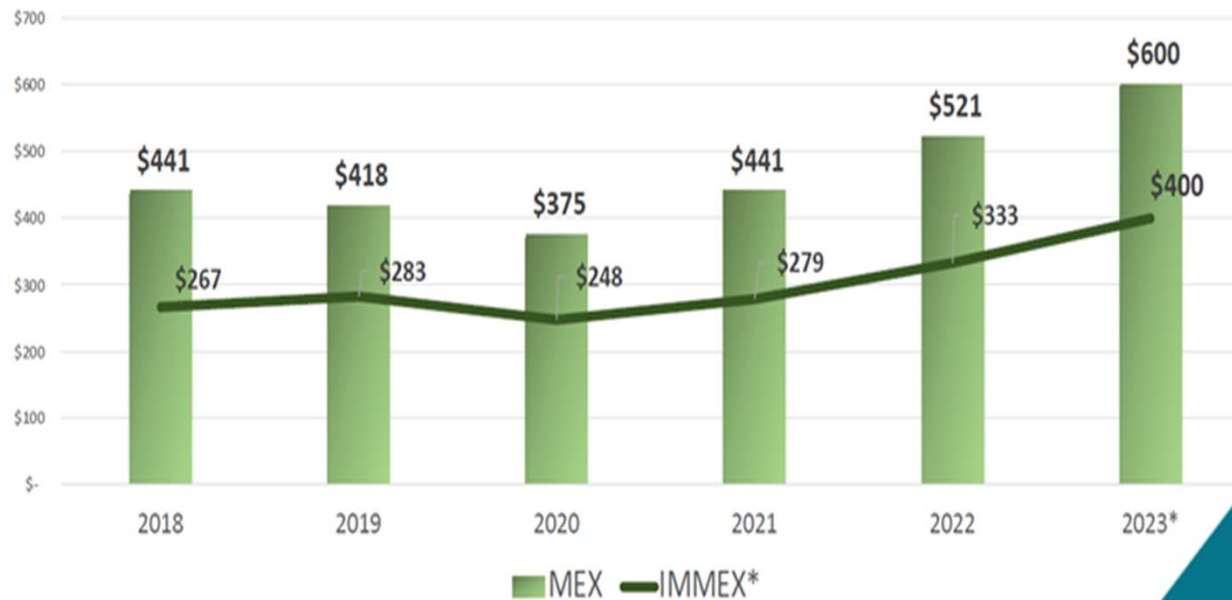
■ 2022 ■ 2023



Source: AFAC, <https://www.gob.mx/cms/uploads/attachment/file/866568/producto-aeropuertos-es-sep-23-26102023.pdf>

Maquiladora & Manufacturing export industry in Mexico

Mexico's export evolution
2018-2023*
(Billions USD)



Source: index Occidente with INEGI data, 2023 estimated* (IMMEX: electronics, automotive, machinery & equipment).

Opportunities for Business Expansion Nearshoring -USA



	240 products	17 sectors	USA worldwide imports (\$M)	México provided (%)
-	Total		647,957	19%
1	Transportation Equipment		144,813	35%
2	Computer Equipment		116,824	6%
3	Chemical Industry		72,523	2%
4	Electrical Accessories		65,870	28%
5	Machinery and Equipment		52,284	20%
6	Basic Metal Industries		50,328	17%
7	Plastic and Rubber Industry		48,118	13%
8	Metal Products		45,396	18%

Source: Compiled by Nafin - Bancomext with information from Trade Map (2021) | Note: M - million US dollars. The analysis considers: US Imports > 50 million USD from Asia, only intermediate goods (BEC), and Mexican Exports > 50 million USD annually to the USA.



GUADALAJARA AIRPORT DEVELOPMENT PROJECT

INTERNATIONAL AIRCARGO

