

MEXICO
INDUSTRY SGICP®
EL MEDIO INFORMATIVO DE LA INDUSTRIA MANUFACTURERA

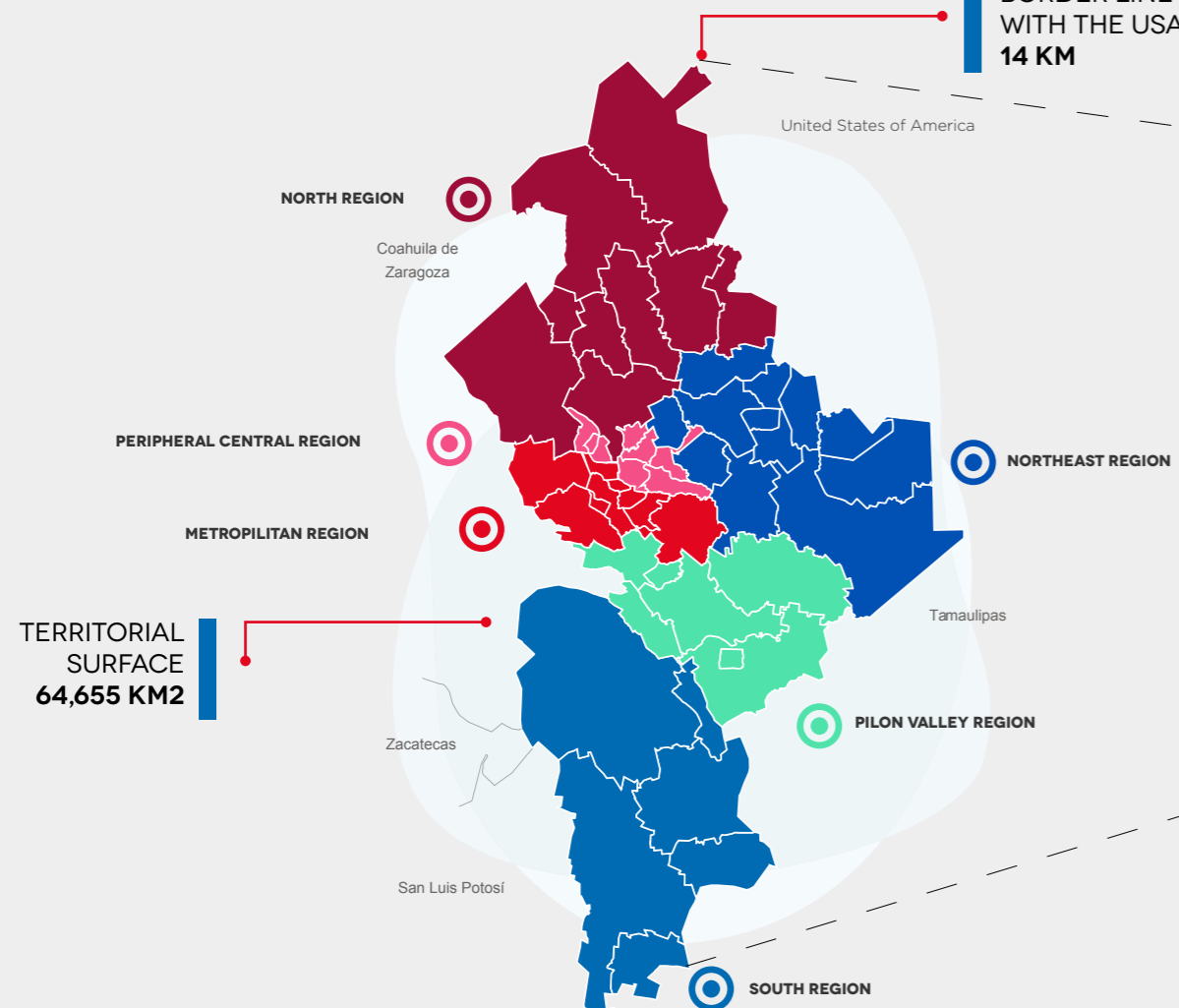
NUEVO LEON

www.mexicoindustry.com

NUEVO LEON STRATEGIC LOCATION

LOCATED IN NORTHEASTERN MEXICO,
BORDERING THE UNITED STATES
(NUEVO LEON/TEXAS)

BORDER LINE
WITH THE USA
14 KM



United States of America



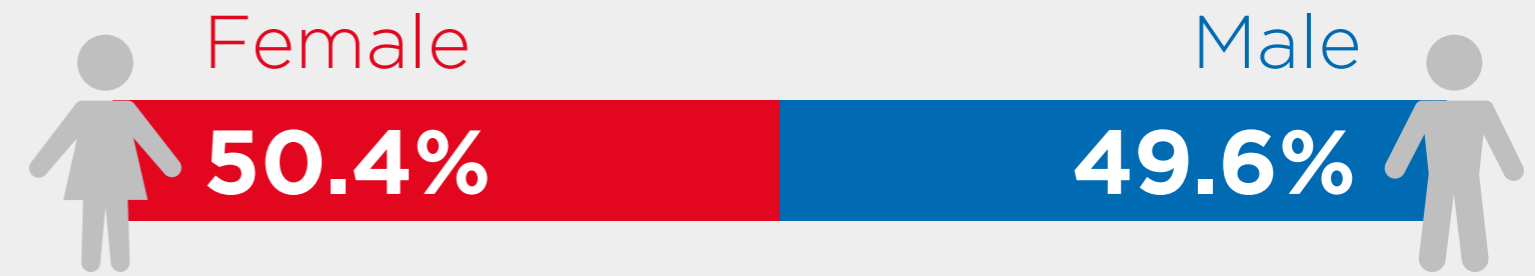
GULF OF MEXICO

PACIFIC OCEAN

Mexico



NUEVO LEON DEMOGRAPHIC PROFILE



Total Population
5,129,505
INHABITANTS



URBAN
94.8%



RURAL
5.2%







EAP: **2,713,337.1**
(ECONOMICALLY ACTIVE POPULATION)

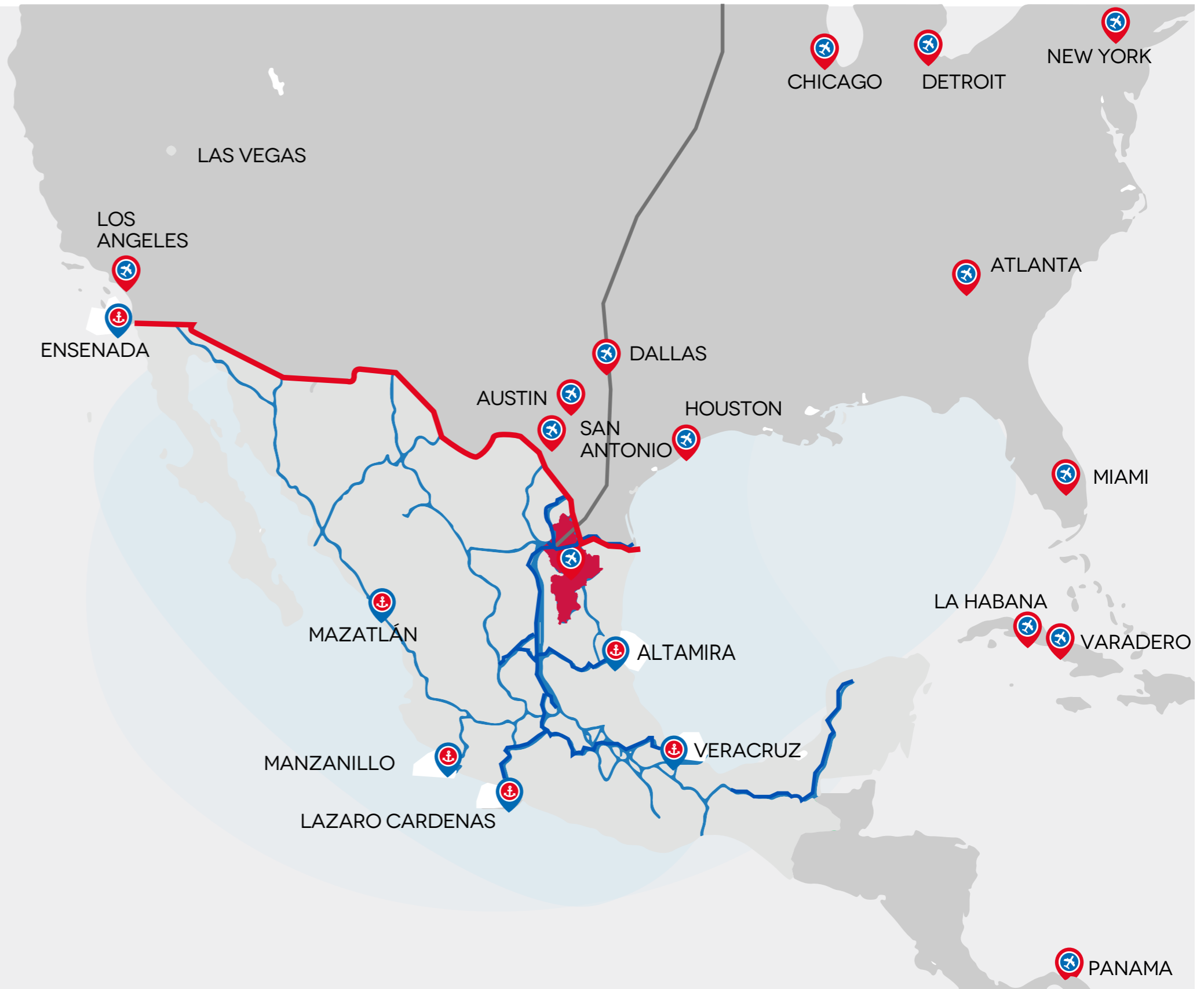
MANUFACTURING INDUSTRY	588,708
COMMERCE	449,318
VARIOUS SERVICES	265,102
SOCIAL SERVICES	220,772
CONSTRUCTION	198,645
RESTAURANTS AND ACCOMMODATION	190,095
AGRICULTURE, CATTLE RAISING, FORESTRY, HUNTING AND FISHING	40,913
TRANSPORTATION, COMMUNICATION POSTAL SERVICE AND STORAGE	181,700
PROFESSIONAL SERVICES, FINANCING AND CORPORATIVE	271,671
GOVERNMENT AND INTERNATIONAL ORGANISMS	80,227
EXTRACTIVE ELECTRICITY INDUSTRY	18,422
NOT SPECIFIED	8,483

 **2.5 MILLION**
TOTAL LABOR FORCE



NUEVO LEON CONNECTIVITY

-  AIR
-  PORT
-  I-35
-  INTERNATIONAL BORDER
-  FERROMEX
-  KANSAS CITY SOUTHERN



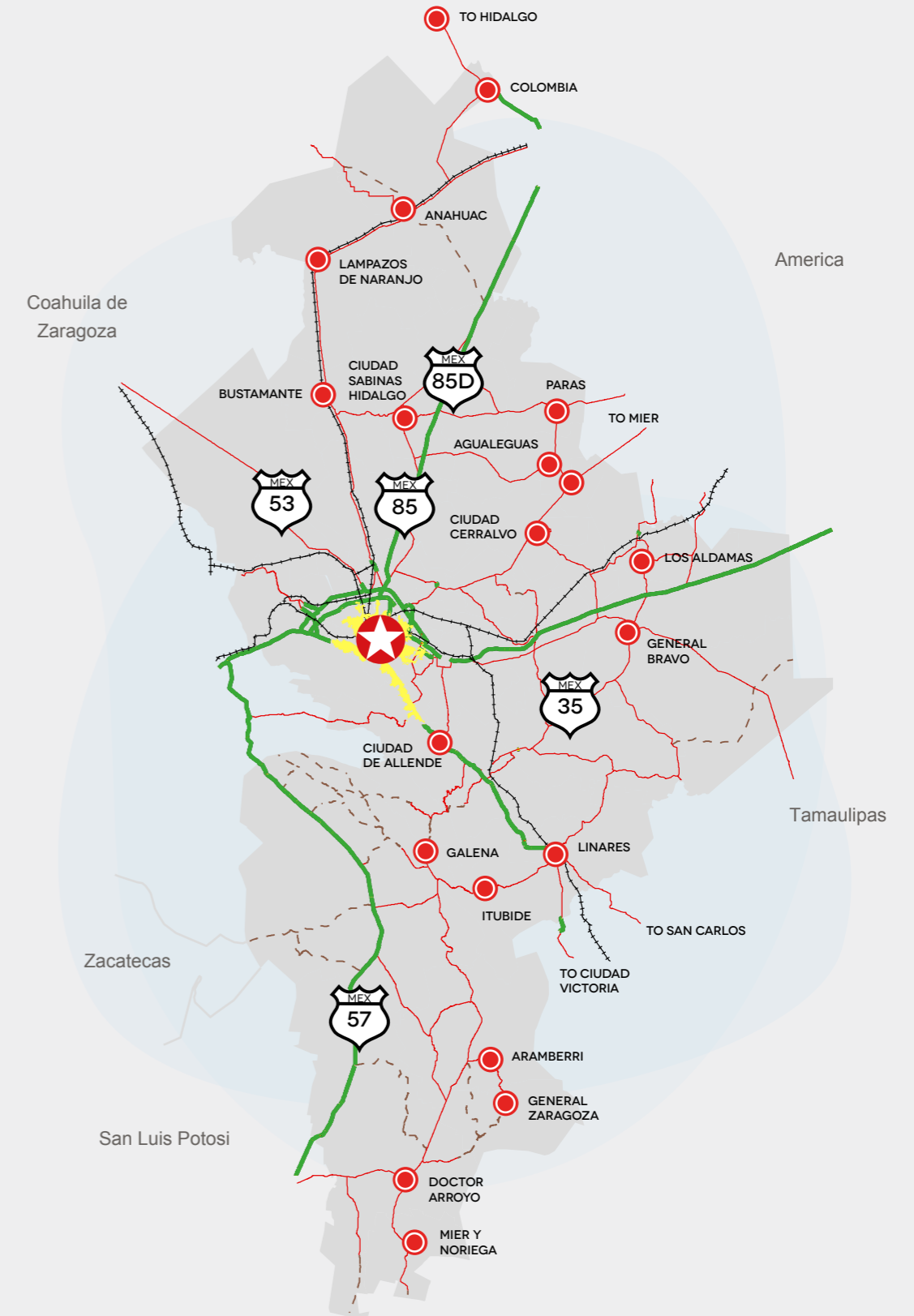
NUEVO LEON ROAD CONNECTIVITY

NUEVO LEON
7,245 KM
ROADS AND HIGHWAYS

LINKING
ECONOMIC
REGIONS

DISTANCE FROM **NUEVO LEON** TO

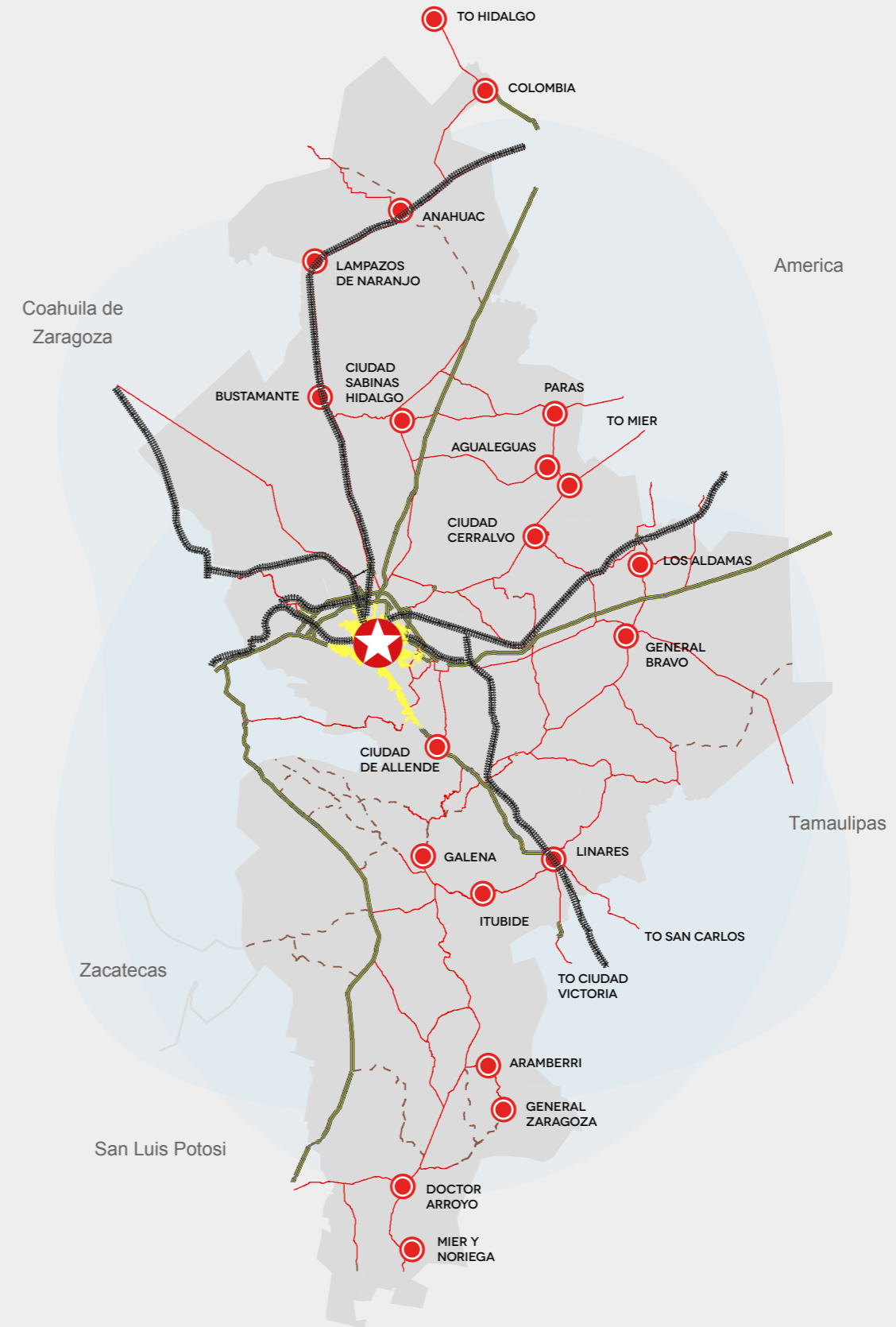
MEXICO MAIN CITIES	KM	MILES	USA MAIN CITIES	KM	MILES	CANADA MAIN CITIES	KM	MILES
Aguascalientes, Ags.	569	354	Atlanta, GA.	2,007	1247	Calgary, QC.	3,682	2,288
Cd. Juarez, Chih.	1,177	731	Chicago, IL.	2,473	1537	Edmonton, AB.	3,952	2,456
Cd. Victoria, Tam.	285	177	Cleveland, OH	2,819	1752	Montreal, QC.	3,744	2,326
Ciudad de Mexico, CDMX.	910	565	Dallas, TX.	916	569	Ottawa, ON.	3,646	2,266
Guadalajara, Jal.	792	492	Detroit, MI.	2,828	1,757	Quebec, QC	4,002	2,487
Guanajuato, Gto.	684	425	Houston, TX.	732	455	Regina, SK.	3,276	2,036
Nuevo Laredo, Tam.	221	137	Los Angeles, CA.	2,458	1,527	Toronto, ON.	3,210	1,995
Queretaro, Qro.	704	437	New York, NY.	3,353	2,083	Vancouver, BC.	3,421	2,126
Saltillo, Coahu.	87	54	San Francisco, CA.	3,071	1,908	Victoria, BC.	3,983	2,475
Tijuana, B.C.N.	2,349	1,460	Seattle, WA.	3,751	2,331	Winnipeg, MB.	2,997	1,862



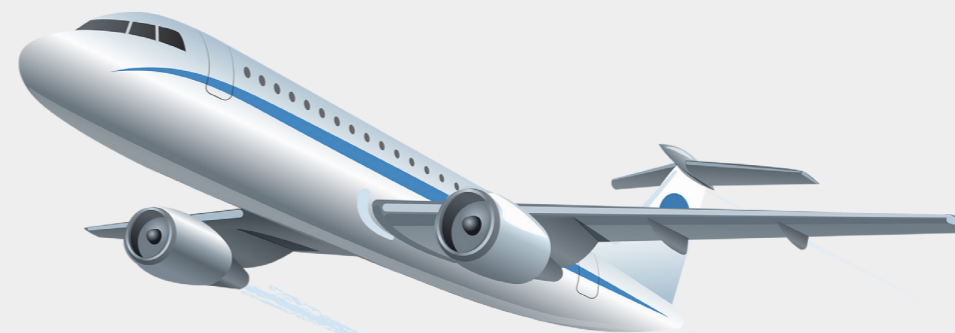
NUEVO LEON RAILROAD CONNECTIVITY

NAME OF ROUTES:

- A) FERROMEX
- B) KANSAS CITY SOUTHERN



NUEVO LEON AIR CONNECTIVITY



2 AIRPORTS



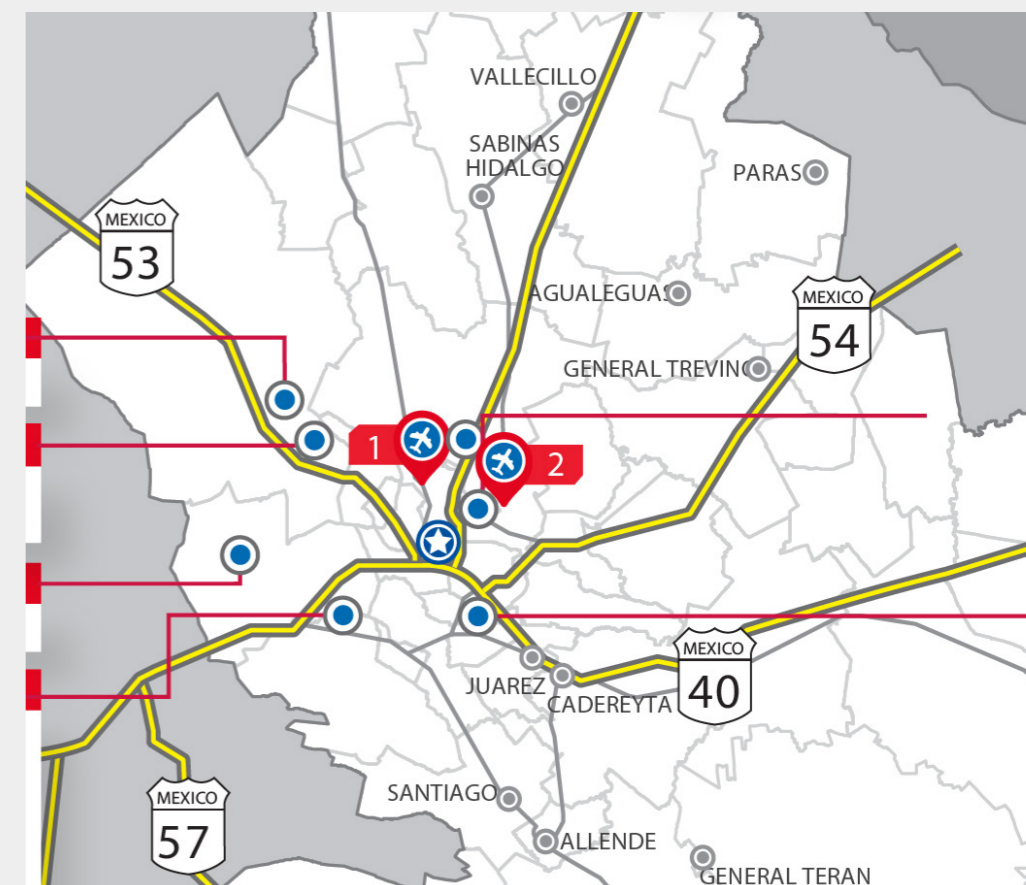
GENERAL MARIANO ESCOBEDO INTERNATIONAL AIRPORT

TYPE: PUBLIC
OPERATOR: GRUPO AEROPORTUARIO CENTRO NORTE
ADDRESS: MIGUEL ALEMAN HIGHWAY KM. 24
APODACA, N.L.



AEROPUERTO INT. DEL NORTE INTERNATIONAL AIRPORT

TYPE: PRIVATE
ADDRESS: HIGHWAY NUEVO LAREDO KM. 1006
APODACA, N.L.
PH. (81) 8030-9090



NUEVO LEON AIR CONNECTIVITY

AIRLINES

- AEROMEXICO
- AEROMEXICO CONNECT
- AMERICAN EAGLE
- CALAFIA AIRLINES
- COPA AIRLINES
- DELTA
- INTERJET
- MAGNICHARTERS
- TAR
- VIVA AEROBUS
- VOLARIS

CARGO AIRLINES

- AMERIJET
- AERO UNION
- ESTAFETA
- FEDEX EXPRESS
- MAS AIR
- REGIONAL CARGO
- AERO CARGA
- UPS
- DHL AVIATION

NATIONAL DEPARTURES

AGUASCALIENTES
CANCUN
CHIHUAHUA
MEXICO CITY
CIUDAD JUAREZ
CIUDAD OBREGON
COZUMEL
CULIACAN
DURANGO
GUANAJUATO
HERMOSILLO
HUATULCO
IXTAPA-ZIHUATANEJO
LA PAZ
LEON
LOS CABOS
LOS MOCHIS

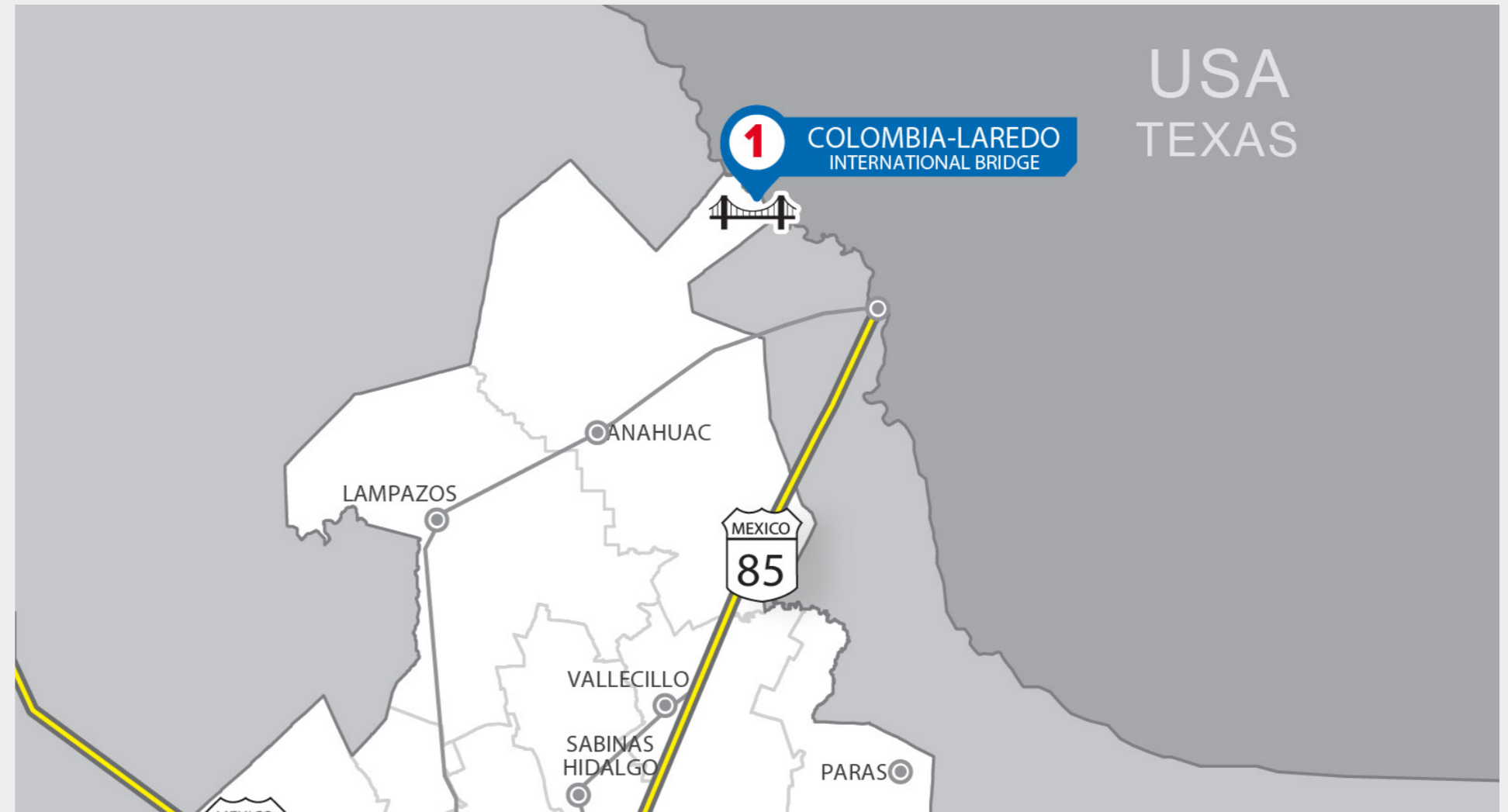
MAZATLAN
MERIDA
MEXICALI
MORELIA
OAXACA
PALENQUE
PUEBLA
PUERTO VALLARTA
QUERETARO
SAN LUIS POTOSI
TAMPICO
TIJUANA
TOLUCA
TUXTLA GUTIERREZ
VERACRUZ
VILLA HERMOSA

INTERNATIONAL DEPARTURES

ATLANTA
CHICAGO
DALLAS
DETROIT
DENVER
HOUSTON
LAS VEGAS
LOS ANGELES
MIAMI
NEW YORK

ORLANDO
SAN ANTONIO
LA HABANA
VARADERO
PANAMA
REP. DOMINICANA
PUNTA CANA

NUEVO LEON INTERNATIONAL CROSSINGS



NUEVO LEON INDUSTRIAL PARKS INFRASTRUCTURE



CIENEGA DE FLORES

1. ROCA DESARROLLOS CIENEGA DE FLORES
2. CPA-LOGISTICS CENTER ADN
3. LAS AMERICAS INDUSTRIAL PARK
4. EVALTA MTP
5. NEXXUS ADN INDUSTRIAL PARK
6. EL NACIONAL INDUSTRIAL PARK
7. METRO ALIANZA F35 | METRO ALIANZA
8. DIAMANTE INDUSTRIAL PARK
9. DIAMANTE II INDUSTRIAL PARK

MONTERREY

1. MONTERREY INDUSTRIAL PARK

SALINAS VICTORIA

1. METRO ALIANZA SALVIC
2. NEXXUS ADN II INDUSTRIAL PARK
3. HOFUSAN INDUSTRIAL PARK
4. INTERPUERTO MONTERREY

ESCOBEDO

1. VYNMSA ESCOBEDO PARK I
2. VYNMSA ESCOBEDO PARK II
3. NEXXUS ESCOBEDO CENTER INDUSTRIAL PARK
4. METRO ALIANZA ESCOBEDO
5. CPA LOGISTICS CENTER ESCOBEDO
6. GP ESCOBEDO SIC INDUSTRIAL PARK
7. STIVA JARAL INDUSTRIAL PARK
8. PUERTA DEL NORTE LOGISTICS PARK
9. ESCOBEDO INDUSTRIAL PARK
10. TECNOCENTRO INDUSTRIAL DEVELOPMENT
11. IGS ESCOBEDO INDUSTRIAL CENTER

ABASOLO

1. EVALTA NLC

EL CARMEN

1. EVALTA CIP
2. EVALTA GTP

GARCIA

1. ADVANCE MONTERREY INDUSTRIAL PARK

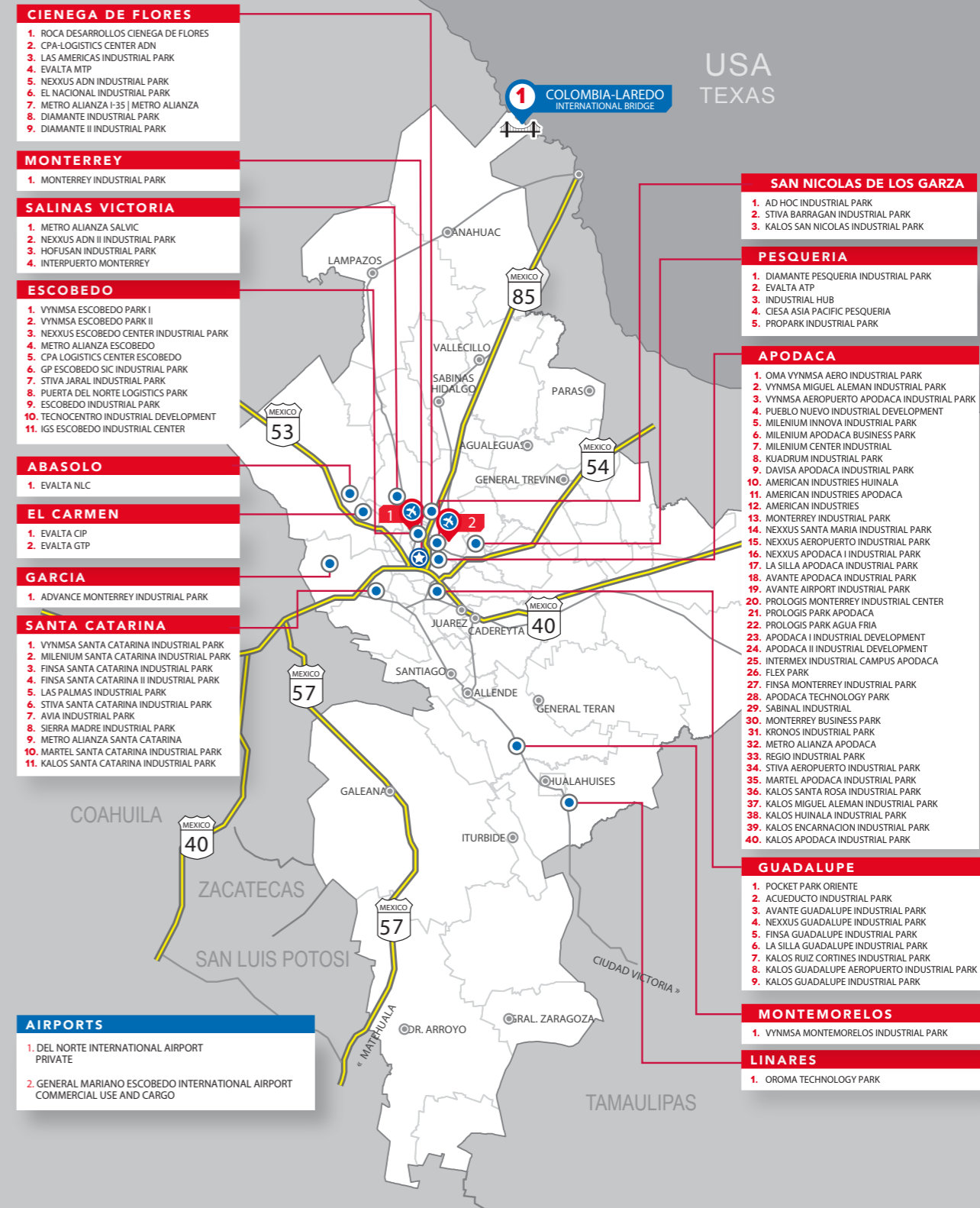
SANTA CATARINA

1. VYNMSA SANTA CATARINA INDUSTRIAL PARK
2. MILENIUM SANTA CATARINA INDUSTRIAL PARK
3. FINSA SANTA CATARINA INDUSTRIAL PARK
4. FINSA SANTA CATARINA II INDUSTRIAL PARK
5. LAS PALMAS INDUSTRIAL PARK
6. STIVA SANTA CATARINA INDUSTRIAL PARK
7. AVIA INDUSTRIAL PARK
8. SIERRA MADRE INDUSTRIAL PARK
9. METRO ALIANZA SANTA CATARINA
10. MARTEL SANTA CATARINA INDUSTRIAL PARK
11. KALOS SANTA CATARINA INDUSTRIAL PARK

AIRPORTS

1. DEL NORTE INTERNATIONAL AIRPORT PRIVATE
2. GENERAL MARIANO ESCOBEDO INTERNATIONAL AIRPORT COMMERCIAL USE AND CARGO

USA
TEXAS



SAN NICOLAS DE LOS GARZA

1. AD HOC INDUSTRIAL PARK
2. STIVA BARRAGAN INDUSTRIAL PARK
3. KALOS SAN NICOLAS INDUSTRIAL PARK

PESQUERIA

1. DIAMANTE PESQUERIA INDUSTRIAL PARK
2. EVALTA ATP
3. INDUSTRIAL HUB
4. CESA ASIA PACIFIC PESQUERIA
5. PROPARK INDUSTRIAL PARK

APODACA

1. OMA VYNMSA AERO INDUSTRIAL PARK
2. VYNMSA MIGUEL ALEMAN INDUSTRIAL PARK
3. VYNMSA AEROPUERTO APODACA INDUSTRIAL PARK
4. PUEBLO NUEVO INDUSTRIAL DEVELOPMENT
5. MILENIUM INNOVA INDUSTRIAL PARK
6. MILENIUM APODACA BUSINESS PARK
7. MILENIUM CENTER INDUSTRIAL
8. KUADRUM INDUSTRIAL PARK
9. DAVIS APODACA INDUSTRIAL PARK
10. AMERICAN INDUSTRIES HUINALA
11. AMERICAN INDUSTRIES APODACA
12. AMERICAN INDUSTRIES
13. MONTERREY INDUSTRIAL PARK
14. NEXXUS SANTA MARIA INDUSTRIAL PARK
15. NEXXUS AEROPUERTO INDUSTRIAL PARK
16. NEXXUS APODACA I INDUSTRIAL PARK
17. LA SILLA APODACA INDUSTRIAL PARK
18. AVANTE APODACA INDUSTRIAL PARK
19. AVANTE AIRPORT INDUSTRIAL PARK
20. PROLOGIS MONTERREY INDUSTRIAL CENTER
21. PROLOGIS PARK APODACA
22. PROLOGIS PARK AGUA FRIA
23. APODACA I INDUSTRIAL DEVELOPMENT
24. APODACA II INDUSTRIAL DEVELOPMENT
25. INTERMEX INDUSTRIAL CAMPUS APODACA
26. FLEX PARK
27. FINSA MONTERREY INDUSTRIAL PARK
28. APODACA TECHNOLOGY PARK
29. SABINAL INDUSTRIAL
30. MONTERREY BUSINESS PARK
31. KRONOS INDUSTRIAL PARK
32. METRO ALIANZA APODACA
33. REGIO INDUSTRIAL PARK
34. STIVA AEROPUERTO INDUSTRIAL PARK
35. MARTEL APODACA INDUSTRIAL PARK
36. KALOS SANTA ROSA INDUSTRIAL PARK
37. KALOS MIGUEL ALEMAN INDUSTRIAL PARK
38. KALOS HUINALA INDUSTRIAL PARK
39. KALOS ENCARNACION INDUSTRIAL PARK
40. KALOS APODACA INDUSTRIAL PARK

GUADALUPE

1. POCKET PARK ORIENTE
2. ACUEDUCTO INDUSTRIAL PARK
3. AVANTE GUADALUPE INDUSTRIAL PARK
4. NEXXUS GUADALUPE INDUSTRIAL PARK
5. FINSA GUADALUPE INDUSTRIAL PARK
6. LA SILLA GUADALUPE INDUSTRIAL PARK
7. KALOS RUIZ CORTINES INDUSTRIAL PARK
8. KALOS GUADALUPE AEROPUERTO INDUSTRIAL PARK
9. KALOS GUADALUPE INDUSTRIAL PARK

MONTEMORELOS

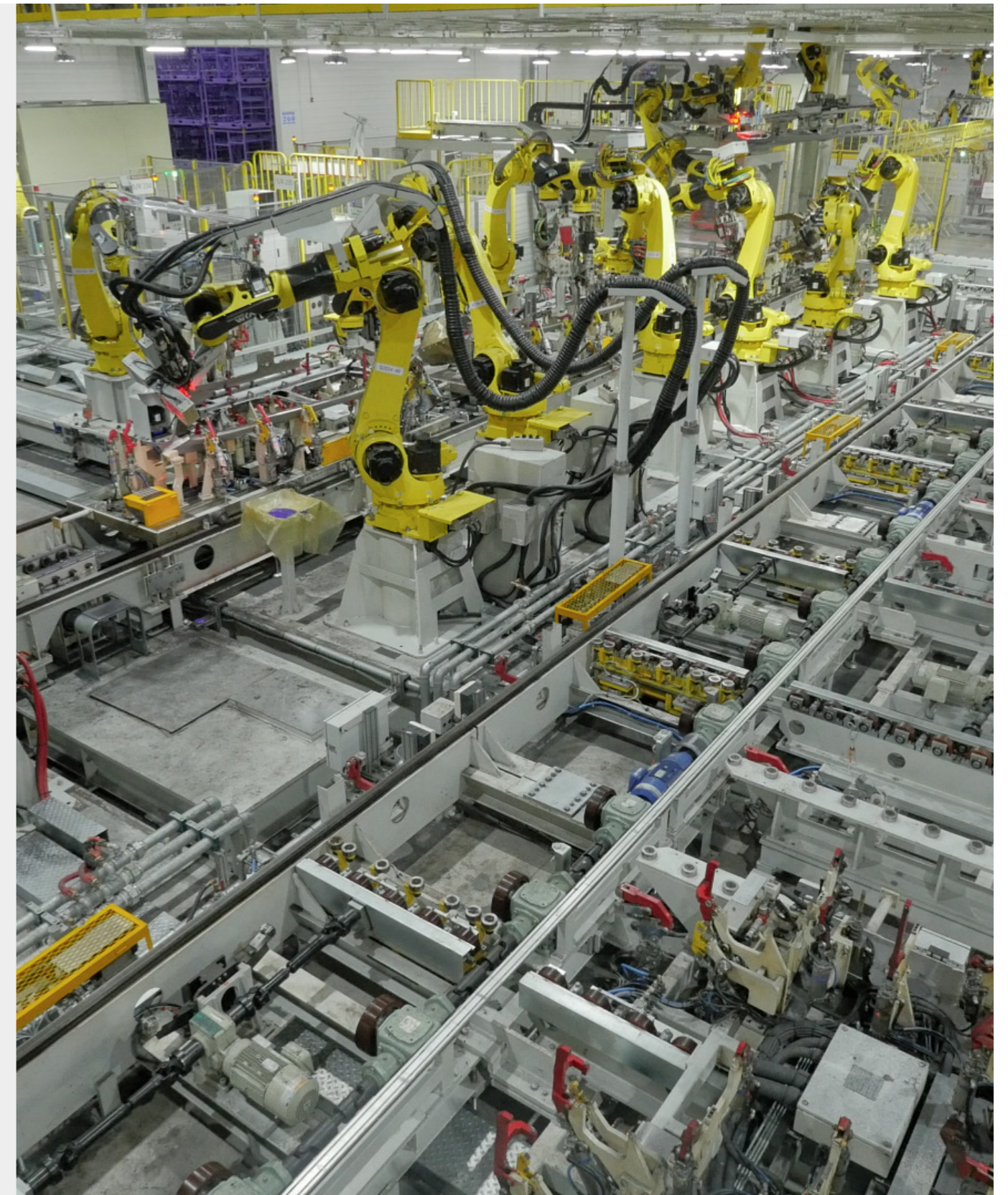
1. VYNMSA MONTEMORELOS INDUSTRIAL PARK

LINARES

1. OROMA TECHNOLOGY PARK

NUEVO LEON INDUSTRY 4.0 AND INNOVATION

Nuevo Leon is the first State in Mexico to launch an initiative that empowers the development of a **4.0 ecosystem**. It seeks to **boost industrial growth**, job creation and a highly skilled labor force. This initiative resulted from a **conjoint effort** between the State Government of Nuevo Leon, private sector representatives, academic institutions and R&D Centers.



NUEVO LEON

RESEARCH AND TECHNOLOGY INNOVATION PARK (PIIT)

- 110** hectares exclusively for R&D centers
- 4** high technology business incubators
- 2,800** jobs created
- +300** linked projects
- +90** international agreements of the R&D center at PIIT



NUEVO LEON

13 FORMALIZED CLUSTERS



Automotive



Aerospace



IT & Software



Home Appliances



Interactive Media



Health



Tooling



Energy



Agrifoods



Tourism



Urban & Housing



Nanotechnology



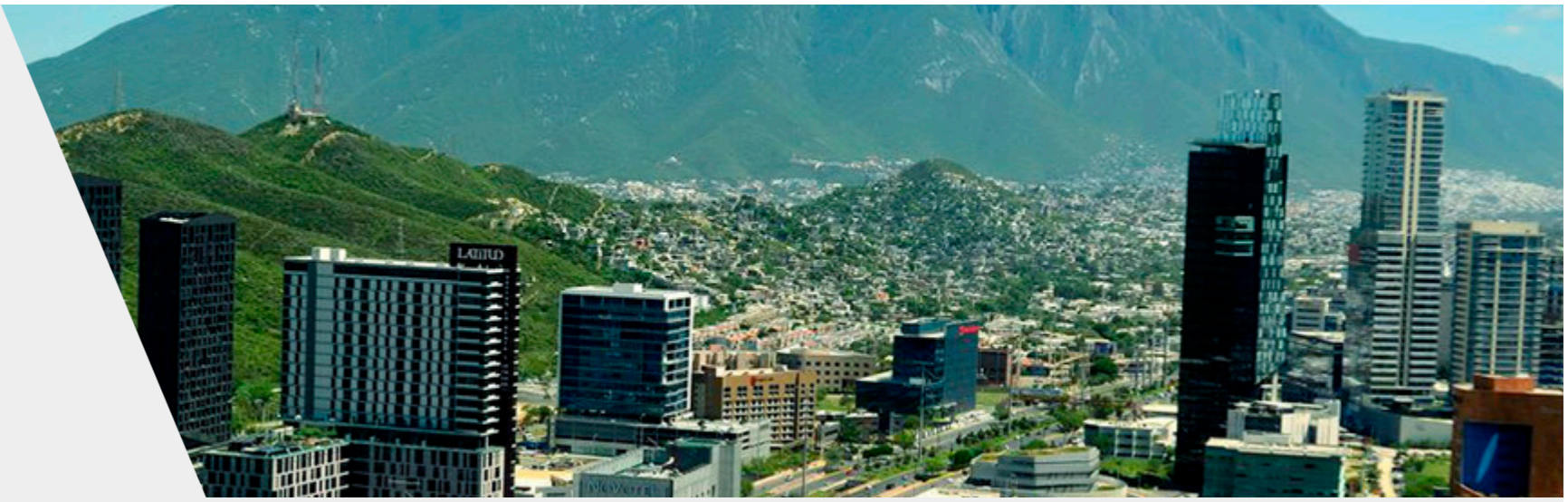
Biotechnology

NUEVO LEON

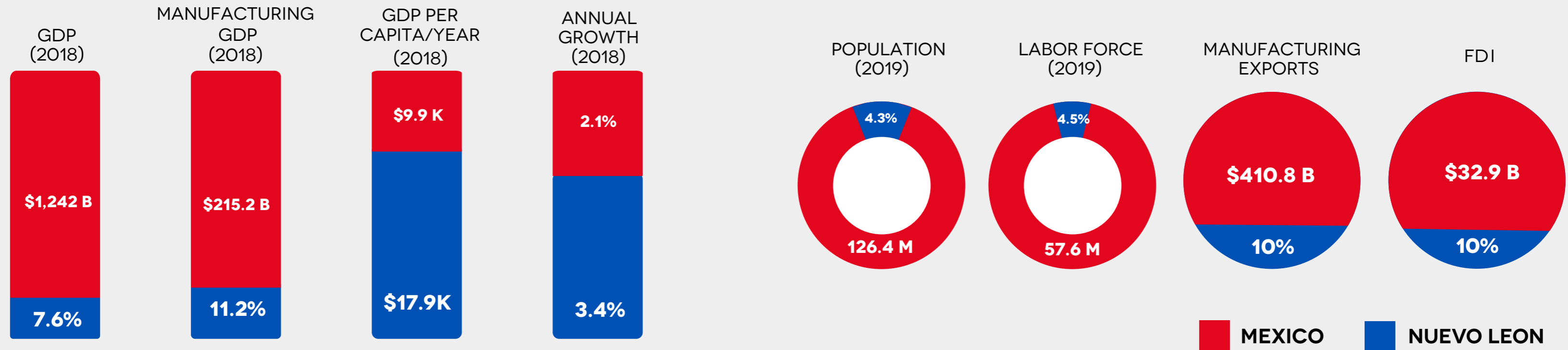
3,900 + FOREIGN CAPITALIZED COMPANIES

AUTOMOTIVE	HOME APPLIANCES	IT&SOFTWARE
ENERGY	FOOD AND BEVERAGE	OTHER
AEROSPACE		

NUEVO LEON ECONOMIC OVERVIEW



HIGHEST GDP PER CAPITA IN MEXICO



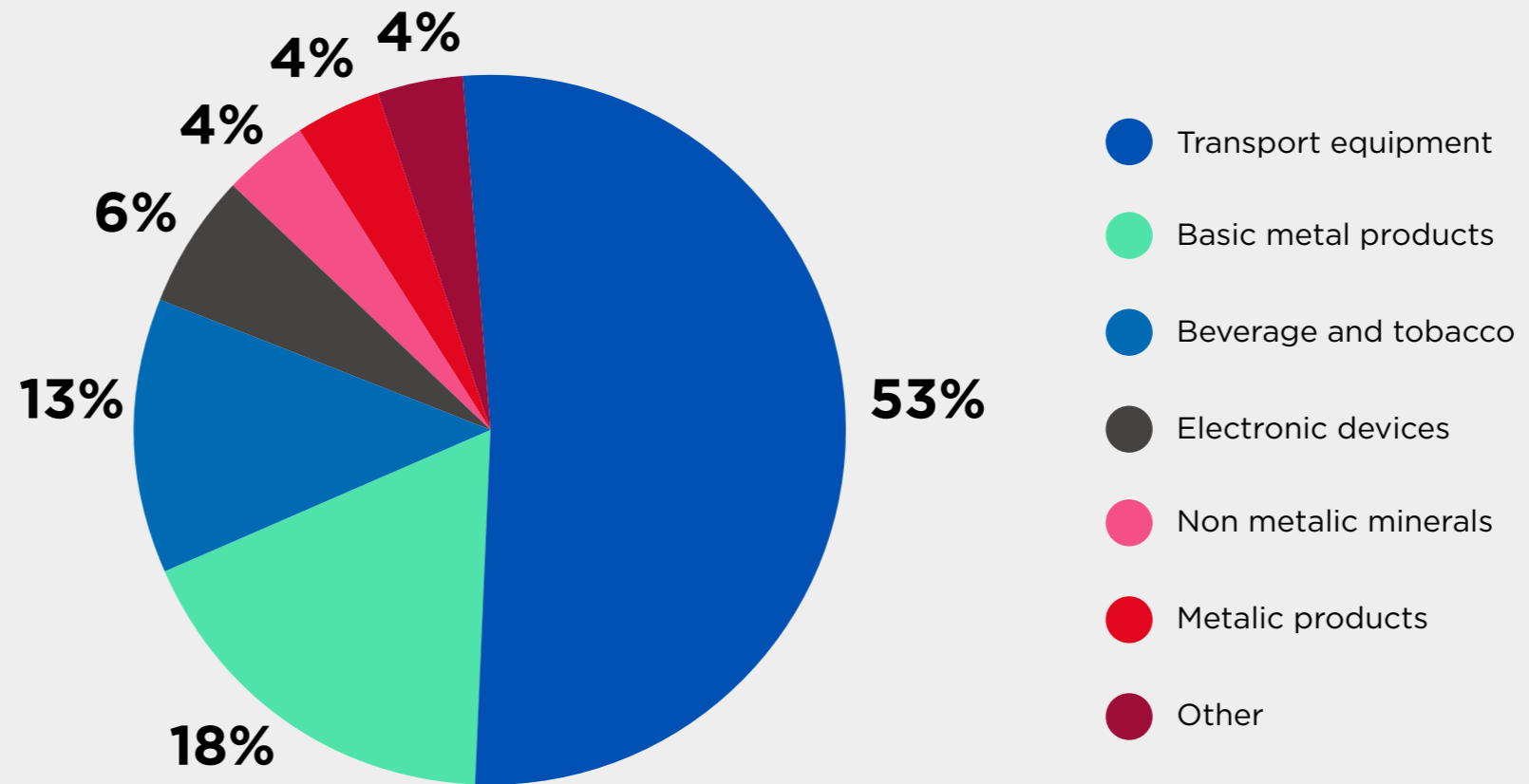
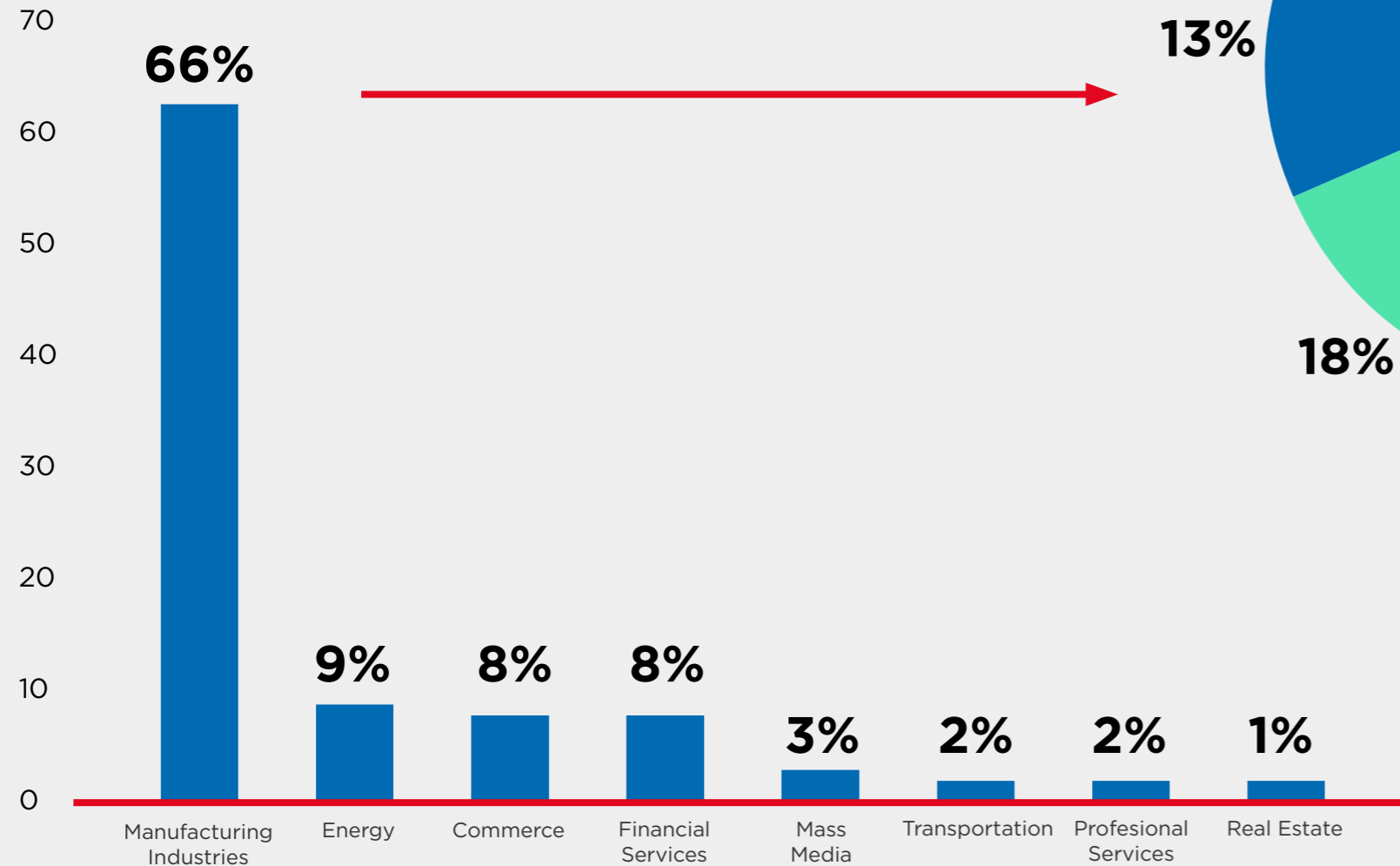
SOURCE: DATA NUEVO LEÓN

FIGURES IN USDOLLARS
SOURCE: DATA NUEVO LEON

NUEVO LEON FDI

MANUFACTURING INDUSTRIES

BY SECTOR



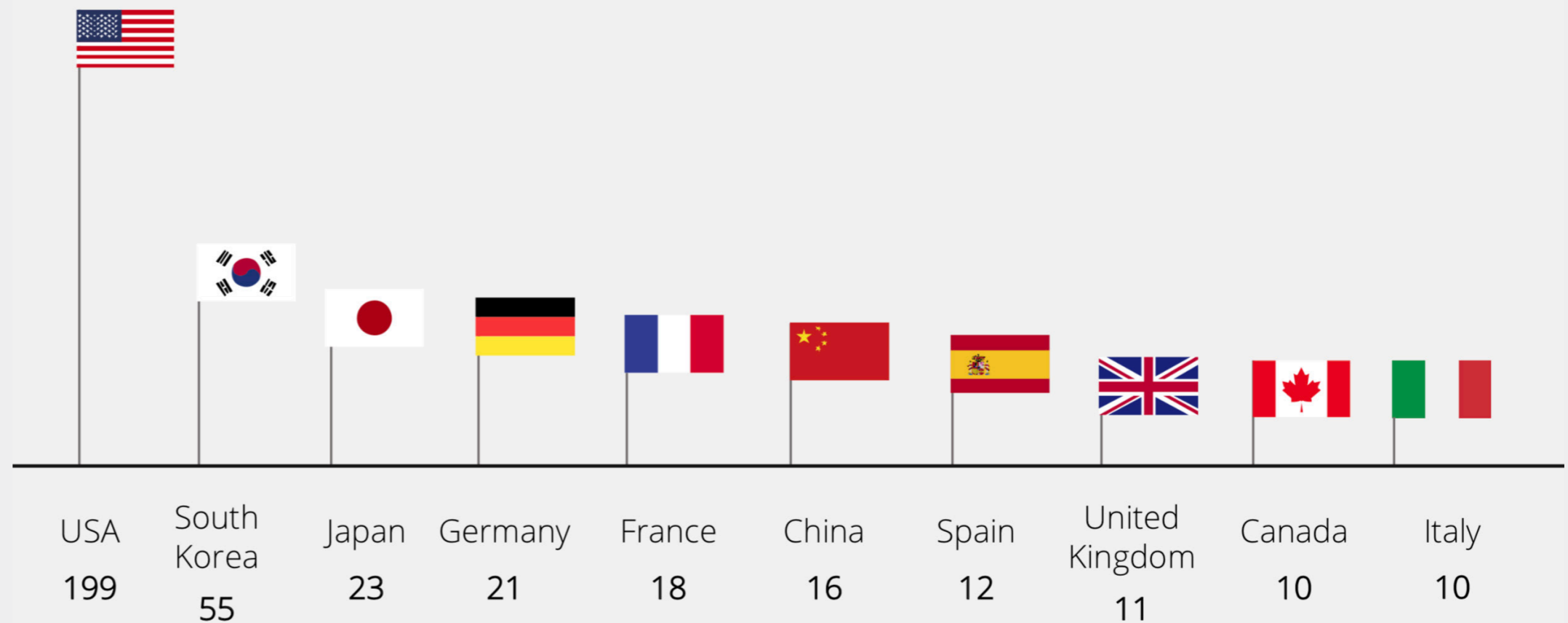
NUEVO LEON PROJECTS BY ORIGIN

**\$3.12 BILLION USD
(2019)**

“Ranked 1st on ease of doing business
by The World Bank”

In **2016** in attraction of foreign investment in Mexico.- In **2017**, in greatest number of new companies with foreign capital in the **National Registry of Foreign Investments** - In **2018** in attraction of foreign investment, representing **13%** of the country's total

2015 - 2019



NUEVO LEON

AUTOMOTIVE INDUSTRY

- The automotive sector represents the largest volume of investments and projects.
- The automotive sector generates **59,700 direct jobs and 65,000 indirect jobs.**
- World leader in the production of motors, batteries, and automotive glass. (signo de puntuación)
- OEMs (plural).

AUTOMOTIVE INDUSTRY IN NUEVO LEON

+200

AUTOMOTIVE COMPANIES

20%

OF THE NATIONAL AUTO PARTS PRODUCTION IS IN NUEVO LEON

#1

EXPORTING SECTOR IN NUEVO LEON

#1

EMPLOYER IN NUEVO LEON

MAIN AUTOMOTIVE COMPANIES

OEM



POLARIS®

DAIMLER



STRONG LOCAL TIER 1



The Automotive Cluster of Nuevo Leon is an association that works under the Triple-Helix Model (Universities+ Companies+Government) with over 120 members. Its main objective is to foster the competitiveness and development of the sector in the region.



NUEVO LEON HOME APPLIANCES INDUSTRY

- 41% of the national production of home appliances is made in Nuevo Leon. **(No. 1 state in household appliances production in Mexico.)**
- **+ 32,000 jobs.**
- It is estimated that for the year **2020** Nuevo Leon will produce more than **4 billion dollars** of household appliances.
- Best developed supplier base for home appliances sector.



HOME APPLIANCES INDUSTRY IN NUEVO LEON

41%
OF THE NATIONAL
PRODUCTION IS MADE
IN NUEVO LEON

+4
BILLION USD
ESTIMATED
FOR 2020

#1
SUPPLIER BASE FOR
HOME APPLIANCES
SECTOR

+32K
JOBS

MAIN COMPANIES

Whirlpool
CORPORATION

Carrier

**Johnson
Controls**

Danfoss

embraco

TRANE

LG Electronics

FRIEDRICH

clelac
Cluster de Electrodomésticos

The Home Appliances Cluster of Nuevo Leon is an association that works under the Triple-Helix Model (Universities+ Companies+Government) with over 50 members. Its main objective is to foster the competitiveness and development of the sector in the region.

NUEVO LEON IT & SOFTWARE INDUSTRY

- More than **400 IT companies**
- Nuevo Leon is among the top 6 Latin American cities and regions with the best level in technical training level for IT sector.
- **+100 university** programs related to the IT sector.
- **14,000+ Jobs** created by the IT sector.
- Ranked 1st with the lowest business costs for Digital Services (**KPMG's Study Competitive Alternatives 2016**).



The IT and Interactive Media Clusters of Nuevo Leon are associations that work under the Triple-Helix Model (Universities+ Companies+ Government) with X members. Their main objective is to foster the competitiveness and development of the sector in the region.



NUEVO LEON IT & SOFTWARE INDUSTRY

- **10th** best destination for IT, BPO, and call center providers (**A.T Kearny's Global Services Location Index 2017**).
- Strategic location and time zone (CST)
- **19 IT** clusters in **16** states with close to a thousand companies.
- **30 technology parks** in Mexico specialized in IT and BPO.
- **+500** thousand IT professionals.

IT & SOFTWARE INDUSTRY IN NUEVO LEON

+400

IT COMPANIES

TOP 6

IN TECHNICAL TRAINING
FOR THE IT SECTOR. (LAN)

+14K

JOBS

#1

LOWEST BUSINESS
COSTS FOR DIGITAL
SERVICES

+100

UNIVERSITY PROGRAMS
RELATED TO THE IT
SECTOR



MAIN COMPANIES



NUEVO LEON AEROSPACE INDUSTRY

- **+3,500 direct jobs** in the Aerospace Industry in Nuevo Leon.
- **+ USD 800 Million** in sales revenue in the **aerospace industry**.
- **Center for Research and Innovation in Aeronautical Engineering (CIIA)**, located in Del Norte Airport in Escobedo.
- By **2020**, Nuevo Leon will be the top **R&D** hub of the country for **advanced manufacturing and aerospace desing**.
- Nuevo Leon has an aero cluster conformed by **22 companies, 6 R&D centers, and 2 State Government dependencies**.

AEROSPACE INDUSTRY IN NUEVO LEON

20%

TIER 1 & TIER 2
SUPPLIERS

**AIRBUS
A32NEO**

TRAINING CENTER
FOR PILOTS,
TECHNICIANS AND
CREW

2

INTERNATIONAL
AIRPORTS

4

FAA CERTIFIED
REPAIR STATIONS

22

AIRCRAFT
MAINTENANCE
WORKSHOPS

2nd

LARGEST AIRCRAFT
FLEET IN MEXICO



NUEVO LEON AEROSPACE INDUSTRY



The Aerospace Cluster of Nuevo Leon is an association that works under the Triple-Helix Model (Universities+ Companies+Government) with over 40 members. Its main objective is to foster the competitiveness and development of the sector in the region.



Center for research and Innovation in Aeronautical Engineering.

Two academic programs:
-Aeronautical Engineering.
-Aeronautical maintenance.

MAIN COMPANIES



SOURCING OFFICES



NUEVO LEON HUMAN CAPITAL

"The vehicles produced by KIA Motors at Nuevo Leon's plant achieved the highest quality standards"
-J.D. Power 2019



11,000+
Technicians
graduate per year



5,800+
Engineers
graduate per year



20,000+
Bachelors
graduate per year

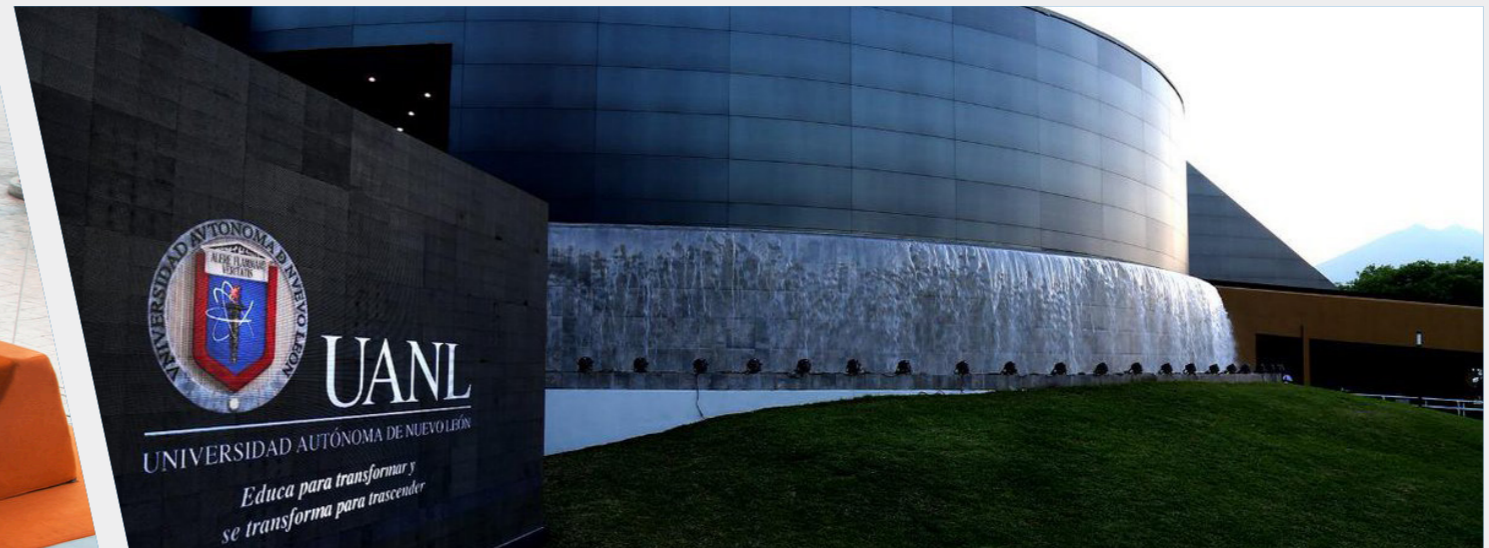


1,000+
Masters and PhD
graduate per year

NUEVO LEON UNIVERSITIES



U-ERRE



HIGHEST LIVING STANDARDS IN MEXICO.

-Mercer, 2019

- + **1,700** high cuisine restaurants
- + **52** highly regarded museums
- + **30** modern shopping centers
- + **15** certified hospitals
- + **8** golf courses



NUEVO LEON OUR SERVICES

A COMPREHENSIVE SYSTEM THAT COVERS A DIVERSITY OF AREAS ACCORDING TO THE NEEDS OF EVERY PROJECT.



**INVESTMENT
CONSULTANCY**



**BUSINESS
AGENDAS**



**NETWORKING
WITH LOCAL PART-
NERS AND POTEN-
TIAL SUPPLIERS**



**SITE
SELECTION**

MEXICO
INDUSTRY SGICP®
EL MEDIO INFORMATIVO DE LA INDUSTRIA MANUFACTURERA

NUEVO LEON



**Gobierno de
Nuevo León**

www.mexicoindustry.com