





17.7

Million habitants

9.3

million inhabitants in Mexico City



Together, they form the largest consumer market in the country with 26.9 million consumers

Economic strenghts





contribution to national Gross
Domestic Product (GDP)

9.6%

of the national GDP in the manufacturing industry



national workforce participation

8.3%

in accumulated Foreign Direct Investment (FDI)

1° place

in Economic Units with over 701 thousand, representing nearly 13% of the national total

13

years without strikes in the manufacturing sector.



Sources:

- -ENOE-INEGI, Il trimestre 2023; Secretaría del Trabajo y Previsión Social, 2023; Secretaría de Economía, 2006 il Tim. 2024.
- -Estadísticas Situación Laboral INEGI, 2022; Secretaría de Educación, Ciencia, Tecnología e





Air connectivity





Rail Connectivity





Access to Ports



Dry Ports



More than 1,3 thousand km Of railway tracks

More than 16 thousand km

Of road network

2 international airports

as part of the Metropolitan Airport System (SAM), along with AICM



Sources:

-INEGI-AEGEUM, 2022.

-SEDECO-GEM, 2023.

Communication infrastructure





The most important logistics HUB in Mexico

 Connecting to the Pacific. Gulf, Bajio, West and Central Mexico



Dry ports:

- Puerta México, in Toluca
- Pantaco in Tlalnepantla Azcapotzalco



Passenger trains in operation

- · Interurban train, Mexico Toluca
- Suburban Train of the Mexico Valley



Freight train:

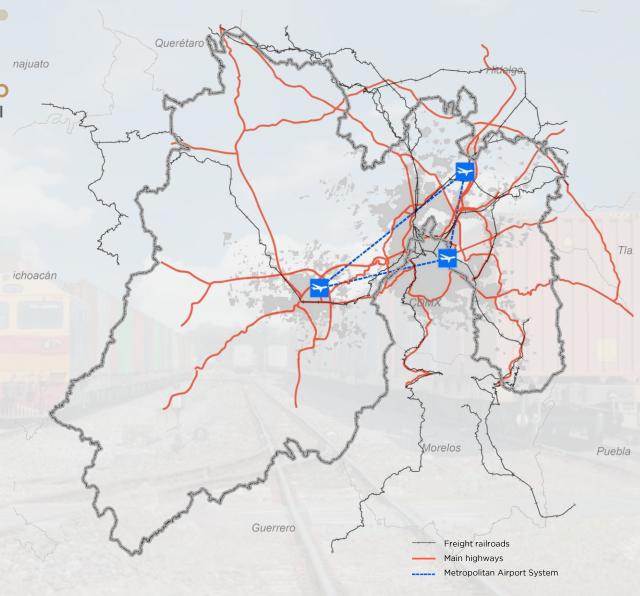
- Operating freight routes: 743 km
- Freight companies: Kansas City Southern, Ferrovalle, Ferrosur and Ferromex

Connectivity for freight trains:

- North America (United States y Canada)
- · Pacific and Gulf of Mexico
- · North, West, Bajio and Southeast Mexico

Sources:

- -AEGEUM-INEGI, 2022.
- -Sistema Ferroviario Mexicano, 2023.
- -Instituto Mexicano del Transporte-Red Nacional de Caminos 2023

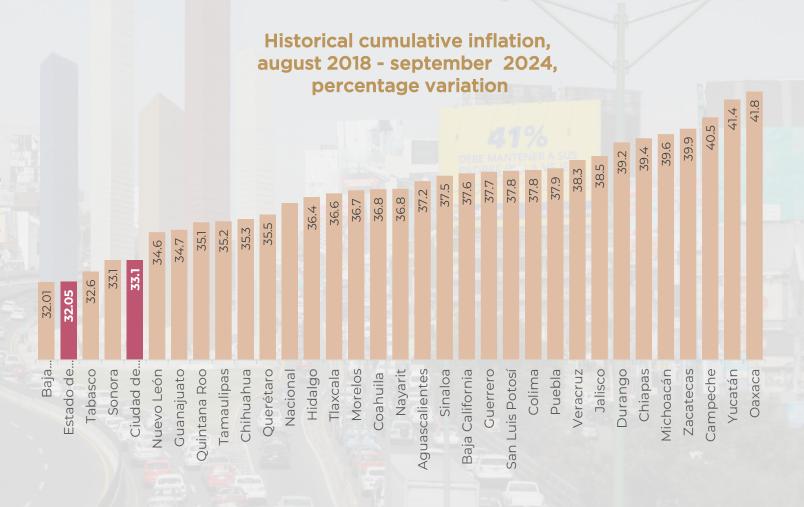


Price stability



We are the second economy with the greatest price stability in the country, having recorded the lowest cumulative inflation in the period from July 2028 to September 2024

74 months



Source:

INEGI. Índice Nacional de Precios al Consumidor



Skilled workforce



8.2 million

people employed in our region, we have the largest labor force in the country

3 thousand 460

institutions of higher and secondary education

1.2 million

students enrolled in higher and secondary education

Sources

-ENOE-INEGI, IV trimestre, 2023; Consolidado Estadístico , GEM. 2023-2024. -CONAHCYT, 2024; Secretaría de Educación, Ciencia, Tecnología e Innovación del GEM. 2023-2024.

+ 4 million

students from basic to postgraduate level, we have the largest enrollment nationwide

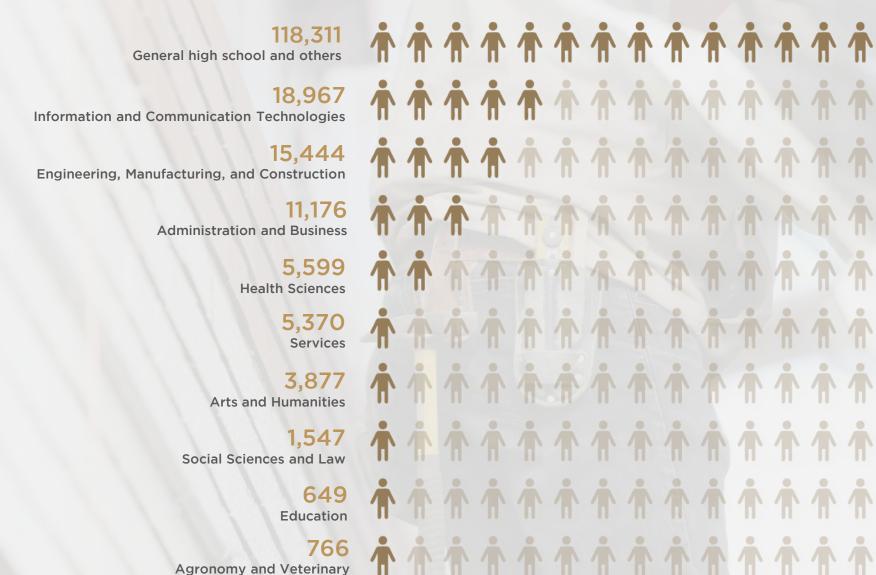
2 mil 428

researchers from the National Researchers System (6% of the national total)

- Level 3: 78
- Level 2: 318
- Level 1: 1,408
- Candidate: 595
- Emeritus: 29



Graduates by field of study



Source:

- Secretaría de Educación, Ciencia, Tecnología e Innovación.

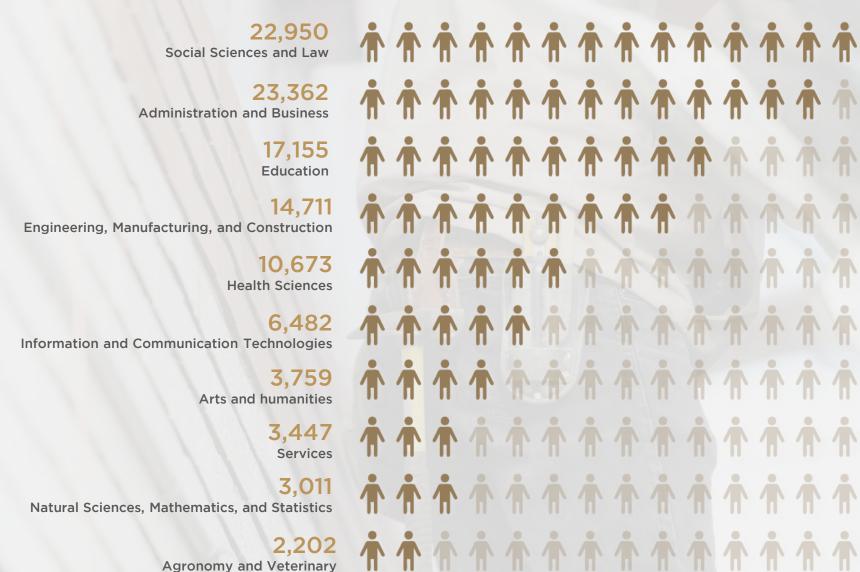
181 thousand 946

students graduated from

upper secondary education in the 2023-2024 school year



Graduates by field of study



107 thousand 752

students graduated from higher education in the 2023-2024 academic year

Source:

Employed Professionals



One million 530 thousand

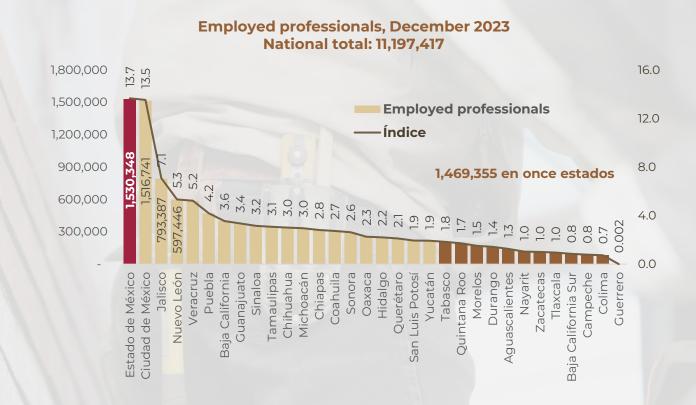
professionals are employed

10%

more employed professionals than those registered jointly in Jalisco and Nuevo Leon

We employ more professionals

than eleven federal entities combined





Salaries paid to professionals

The incomes of professionals from the State of Mexico are lower:

11.3%

compared to those paid nationally

52.4%

compared to those of Nuevo Leon

56.4%

compared to those of Mexico City

49.6%

compared to those of Baja California

9°

entity where the lowest salaries are paid

Average monthly income paid to professionals December 2023





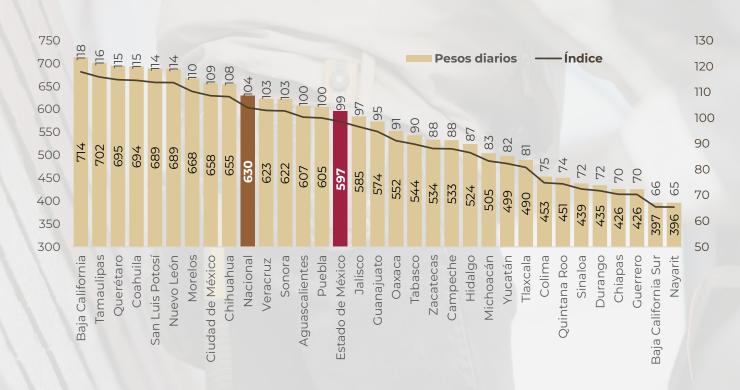


The salaries paid to workers in the State of Mexico in the manufacturing industry are:

5% lower than those paid nationally

They are inferior to those paid in the leading states generating value in the national manufacturing industry

Average wages paid to IMSS-registered workers in the transformation industry, august 2024





More than 3 thousand 800 companies More tan 233 thousand

Property regime:

75 142 2 municipalized private state-owned

Main activity	Developments	Percentages
Industrial	63	29%
Logistics	104	48%
Mixed	52	23%
Total	219	



State of Mexico we have

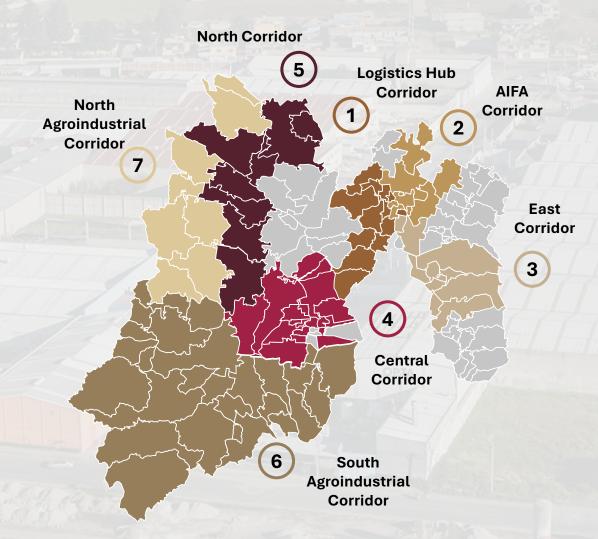
7 Strategic Productive Corridors (SPC)



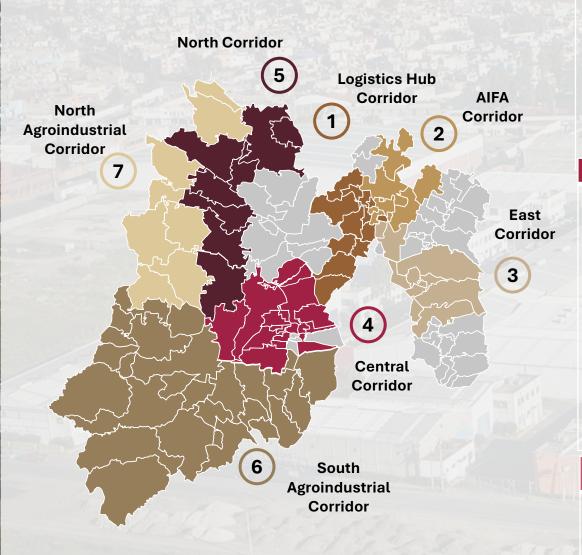


They stand out for their location, economic vocation and connectivity

- 1. Logistics Hub Corridor
- 2. AIFA Corridor
- 3. East Corridor
- 4. Central Corridor
- 5. North Corridor
- 6. South Agroindustrial Corridor
- 7. North Agroindustrial Corridor



Strategic Productive Corridors (SPC)



Note: preliminary version

Source:

Ministryof Economic Development, 2024..

1. Logistics Hub Corridor

- 1. Cuautitlán
- 2. Tultitlán
- 3. Naucalpan de Juárez
- 4. Huixquilucan
- 5. Cuautitlán Izcalli
- 6. Atizapán de Zaragoza
- 7. Tlalnepantla de Baz
- 8. Coyotepec
- 9. Huehuetoca
- 10.Teoloyucan
- 11 Tamatastián

4. Central Corridor

- 1. Capulhuac
- 2. Ocoyoacac
- 3. San Antonio la Isla
- 4. Zinacantepec
- 5. Rayón
- 6. Tianguistenco
- 7. Toluca
- 8. Xonacatlán
- 9. Chapultepec
- 10.Mexicaltzingo
- 11. Calimaya
- 12. Lerma
- 13. Metepec
- 14. Otzolotepec
- 15. San Mateo Atenco
- 16. Tenango del Valle

Municipalities covered

- Economic: 54
- · Agro-industrial: 34
- Total: 88

2. AIFA Corridor

- 1.Jaltenco
- 2.Tecámac
- 3.Zumpango
- 4.Tonanitla
- 5.Tultepec
- 6.Nextlalpan
- 7. Melchor Ocampo
- 8. Hueypoxtla
- 9.Temascalapa

5. North Corridor

- 1. Almoloya de Juárez
- 2. Acambay de Ruíz Castañeda
- 3. Atlacomulco
- 4. Soyaniquilpan de Juárez
- 5. Jilotepec
- 6. Timilpan
- 7. Ixtlahuaca
- 8. Jocotitlán

7. North Agroindustrial Corridor

- 1. Aculco
- 2. El Oro
- 3. Polotitlán
- 4. San Felipe del Progreso
- 5. San José del Rincón
- 6. Temascalcingo
- 7. Villa de Allende
- 8. Villa Victoria

3. East Corridor

- 1. La Paz
- 2. Texcoco
- 3. Coacalco de Berriozábal
- 4. Chalco
- 5. Chicoloapan
- 6. Chimalhuacán
- 7. Ecatepec de Morelos
- 8. Ixtapaluca
- 9. Nezahualcóyotl
- 10. Valle de Chalco Solidaridad

6. South Agroindustrial Corridor

- 1. Almoloya de Alquisiras
- 2. Ixtapan del Oro
- 3. Joquicingo
- 4. Malinalco
- 5. Ocuilan
- 6. San Simón de Guerrero
- 7. Zumpahuacán
- 8. Santo Tomás
- 9. Sultepec
- 10. Tenancingo
- 11. Luvianos
- 12. Tonatico
- 13. Amatepec
- 14. Valle de Bravo
- 15. Villa Guerrero
- 16. Zacazonapan
- 17. Zacualpan
- 18. Amanalco
- 19. Coatepec Harinas
- 20.Tlatlaya
- 21. Donato Guerra
- 22. Ixtapan de la Sal
- 23.Otzoloapan
- 24.Tejupilco
- 25.Temascaltepec 16
- 26.Texcaltitlán



Strategic sectors

Secondary sectors

- Energy
- Construction
- Manufacturing Industries
 - Automotive
 - Chemical
 - · Food
 - Textile
 - Plastics
 - Beverages and Tobacco
 - Paper and Printing
 - Metal Products
 - **Pharmaceutical**
 - Furniture Manufacturing

Sector terciario

- Commerce
- Logistics
- Financial and Insurance Services
- Real Estate Services
- Waste Management
- Professional, Scientific, and Technical Services



Energy



National data

1° place

with one thousand 439 economic units

1° place

with 7.4% of this sector's GDP at the national level

Statal data

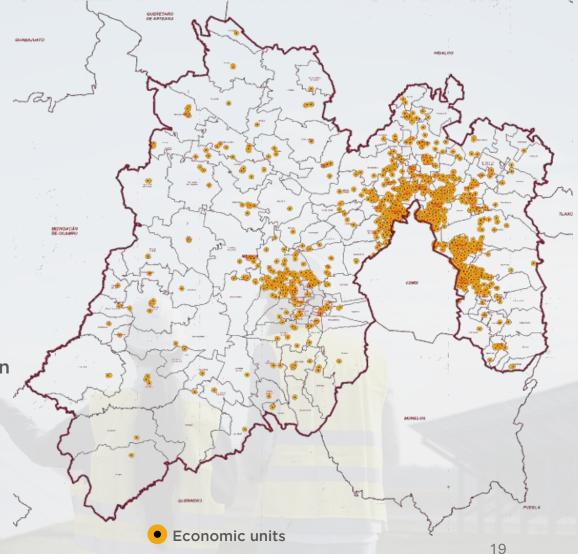
1.1% contribution to the state economy

14 mil 945

employed individuals

1.4%

of the state's foreign direct investment



Sources:

DENUE-INEGI, May 2024. GDP-INEGI, 2022. ENOE - INEGI, 2nd quarter of 2024. Ministry of Economy, 2006 - 2nd quarter of 2024.

Construction



National data

6.7% of the national construction sector

One thousand 508 economic units

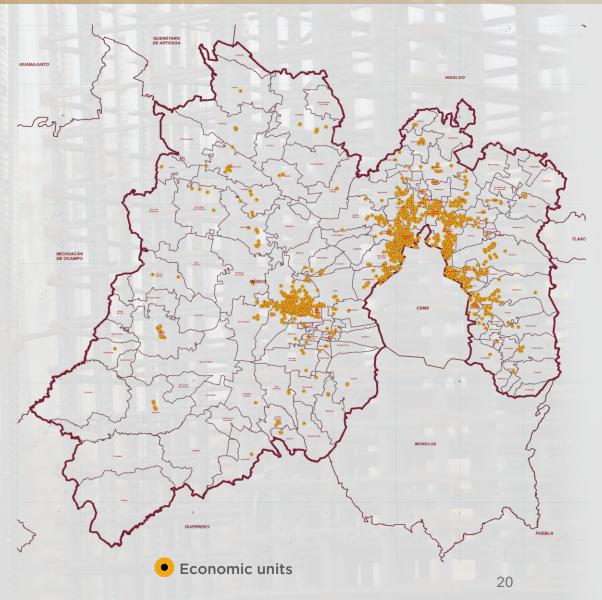
> Statal data

4.0% of the state economy

666 thousand 423 employed individuals 12.9% of the state's foreign direct investment

Sources:

DENUE-INEGI, May 2024. GDP-INEGI, 2022. ENOE – INEGI, 2nd quarter of 2024. Ministry of Economy, 2006 – 2nd quarter of 2024.



Manufacturing industries



National data

1° place

with 65 thousand 364 economic units

State data

21.9% of the state economy

99.2% of total

9.6% of the national manufacturing production

Over 1.2 million

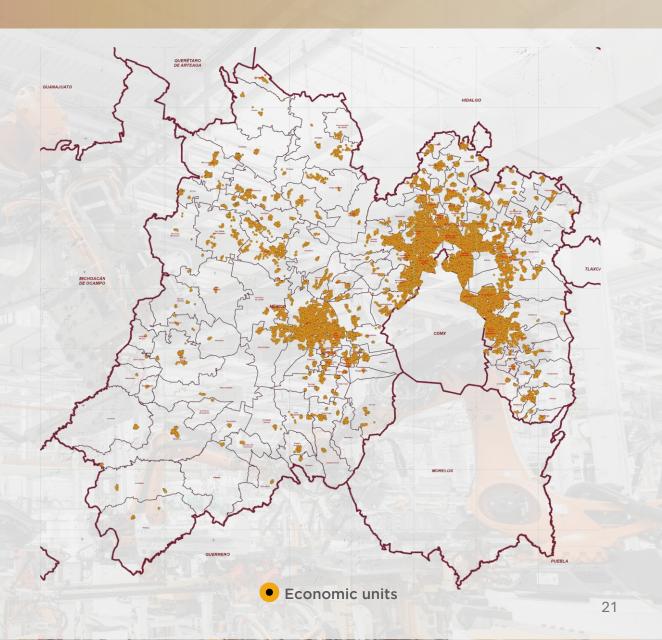
employed individuals

58.4%

of the state's foreign direct investment

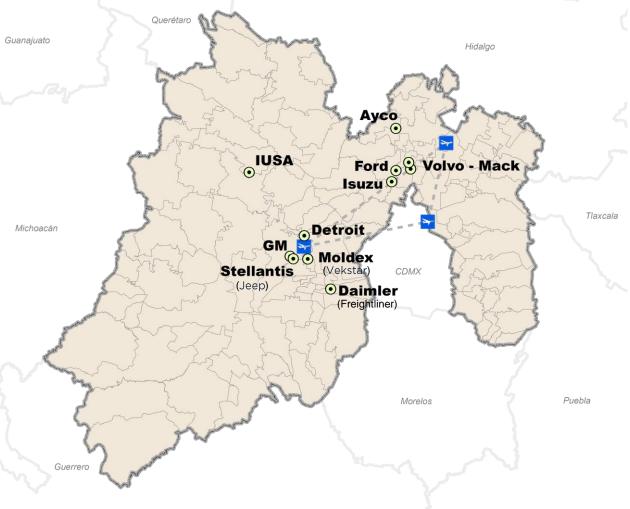
Sources:

DENUE-INEGI, May 2024.
GDP-INEGI, 2022.
ENOE - INEGI, 2nd quarter of 2024.
Ministry of Economy, 2006 - 2nd quarter of 2024.



Automotive industry ecosystem

Automobile assembly plants



Key figures

382,251

economic units, belong to the more than 150 supplier branches of the automotive industry.

assembly plants

12.6%

contribution to state value added.

Assembly plants

Automobiles, electric cars and vans.



1. Ford: Cuautitlan Izcalli (1964).

2. Moldex: Lerma (1986) (Flotilla).

3. Stellantis: Toluca (1968).

4. IUSA: Jocotitlan (ND).

Engines and transmissions.



1. General Motors: Toluca (1965).

2. Detroit: Toluca (ND).

Trucks, tractortrailers and buses.



1. Daimler (Freightliner):

Tianguistenco (1969).

2. Ayco: Huehuetoca (1986).

3. Volvo: Tultitlan (2000).

4. Mack: Tultitlan (2000).

5. Isuzu: Cuautitlan Izcalli (2009).



















Products produced in the State.





Chemical Industry



National data

1° place

with 975 economic units

1° place

with 27.1% of national production

2° place

with 22.0% of foreign direct investment

> Statal data

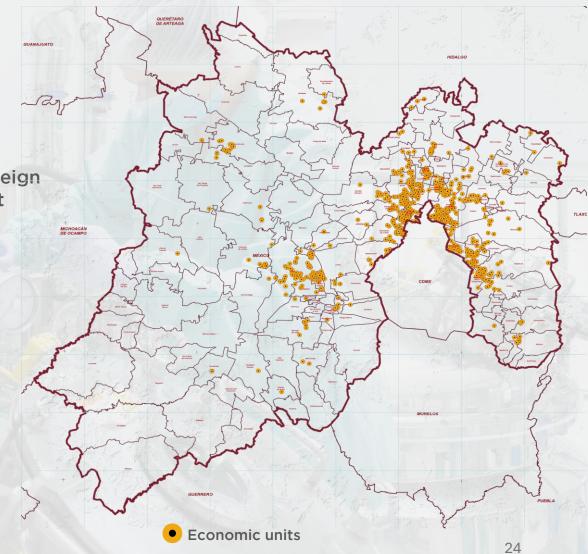
8.8% of the state's value added

49 mil 866

employed individuals

8.0%

of the state's exports



Sources:

DENUE-INEGI, May 2024. GDP-INEGI, 2022. Economic Censuses 2019. Ministry of Economy, 2006 – 2nd quarter of 2024.

Food Industry



National data

1° place

with 28 thousand 745 economic units

1° place

With 13.2% of national production

3° place

with 8.8% of exports.



5.9% of the state economy

131 thousand 865

employed individuals

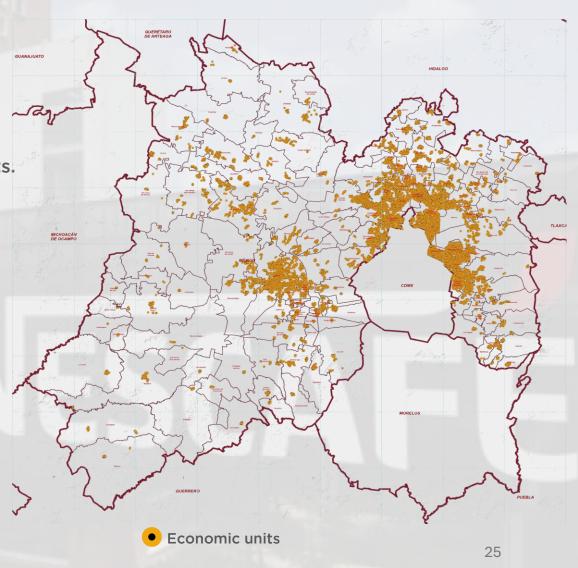
of the state's foreign direct

3.7%

investment

Sources:

DENUE-INEGI, May 2024. GDP-INEGI, 2022. Economic Censuses 2019. Ministry of Economy, 2006 - 2nd quarter of 2024

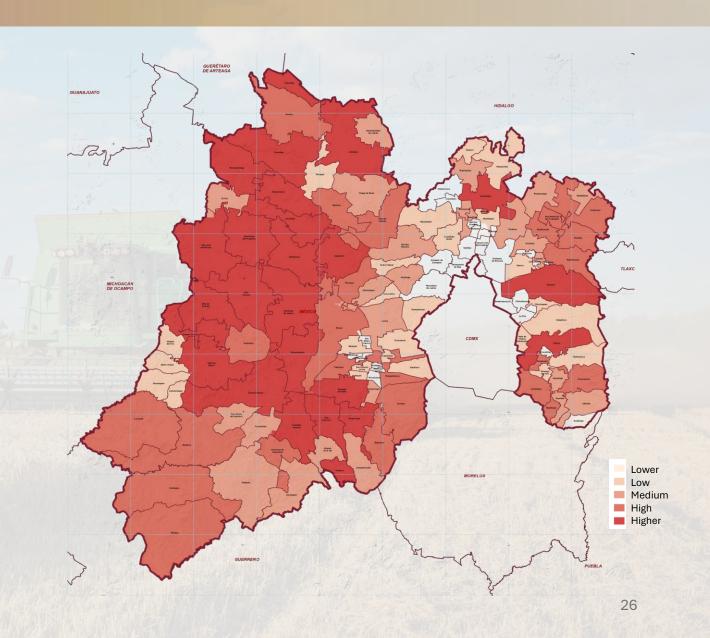


Municipalities by agricultural vocation



Main agricultural municipalities

- Villa Guerrero
- | Coatepec Harinas
- Tenancingo
- Almoloya de Juárez
- Jocotitlán
- Ixtlahuaca
- Villa Victoria
- Temascaltepec
- Jilotepec
- San José del Rincón
- Texcoco
- Chalco



Industria textil





1° place

with 14.6% of national production



2.6% of the state's value added

2.2% of the state's exports

102 thousand

455 employed individuals

0.3% of the state's foreign direct investment

6 thousand economic units Economic units

Sources:

-DENUE-INEGI, May 2024; Economic Censuses-INEGI, 2019. Exports by Federal Entity-INEGI, 2023, Ministry of Economy, 2006 - 2nd quarter of 2024

Plastics



National data

2° place

with thousand 119 economic units

2° place

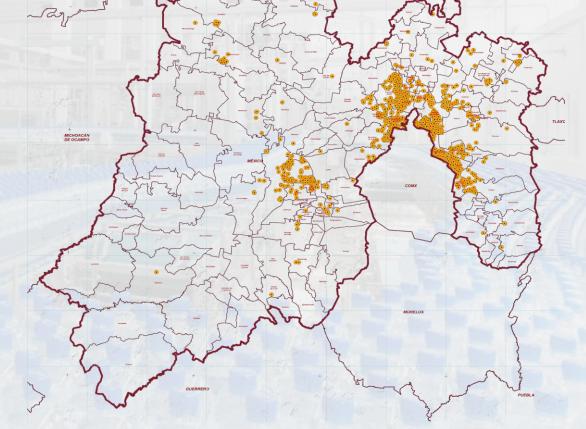
with 17.5% of national production



3.0% of the state's value added

55 thousand 483 employed individuals

O.5% of the state's foreign direct investment



Sources:

DENUE-INEGI, May 2024. Economic Censuses-INEGI, 2019. Exports by Federal Entity-INEGI, 2023. Ministry of Economy, 2006 – 2nd quarter of 2024..

Beverages and Tobacco



National data

1° place

with 4 thousand 775 economic units

Statal data

3.0% of the state's value added

0.9% of the state's exports

2° place

with 12.4% of national production

20,626

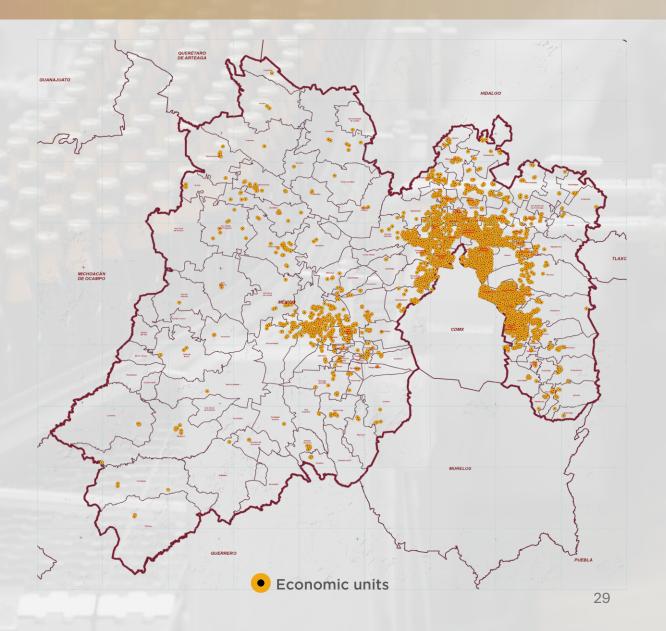
employed individuals

9.2%

of the state's foreign direct investment

Sources:

DENUE-INEGI, May 2024. Economic Censuses-INEGI, 2019. Exports by Federal Entity-INEGI, 2023. Ministry of Economy, 2006 – 2nd quarter of 2024..



Paper and Printing Industry



30

National data

1° place

with 17.7% of national production

2° place

wit 2,783 economic units

2° place

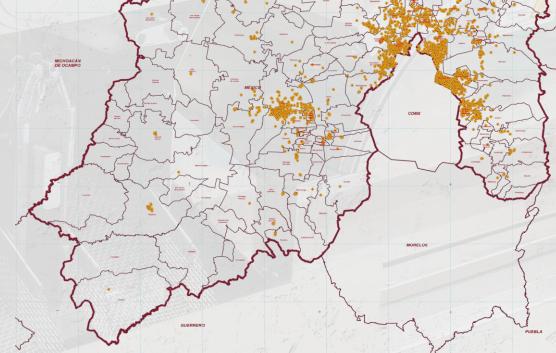
in attracting foreign investment with 19.0%

Statal data

2.4% of the state's value added

42 thousand 565 employed individuals

1.2% of the state's exports



Economic units

Sources:

DENUE-INEGI, May 2024. Economic Censuses-INEGI, 2019. Exports by Federal Entity-INEGI, 2023. Ministry of Economy, 2006 – 2nd quarter of 2024.

Metal Industries



National data

1° place

witg 8 thousand 375 economic units

2° place

with 11.9% of national production

5° place

with 7.3% of exports

Statal data

2.2% of the state's value added

54 mil 748

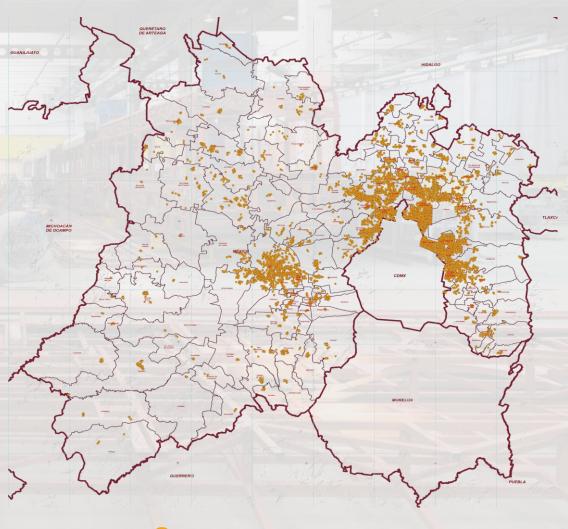
employed individuals

0.4%

of foreign direct investment

Sources:

DENUE-INEGI, May 2024. Economic Censuses-INEGI, 2019. Exports by Federal Entity-INEGI, 2023. Ministry of Economy, 2006 – 2nd quarter of 2024.



Municipalities with a vocation for metallic mining





Municipality/Mine	Type og Mineral	
Zacazonapan Mine:Tizapa	Silver, lead, zinc, cooper and gold	
Zacualpan Mine:Guadalupe	Silver, lead, zinc and gold	

Mines in operation

Municipalities with a m	nining vocation for metallic minerals	
- El Oro.	- San Simón de Guerrero.	
- San José del Rincón.	- Tejupilco.	
- Donato Guerra.	- Luvianos.	
- Ixtapan del Oro.	- Amatepec.	
- Temascaltepec.	- Tlatlaya.	
- Valle de Bravo.	- Zacualpan.	
- Zacazonapan.	- Sultepec.	
- Otzoloapan.	- Almoloya de Alquisiras	
- Santo Tomás.		



Sources

-Secretaría de Economía, 2023

⁻Instituto de Fomento Minero y Estudios Geológicos del Estado de México (IFOMEGEM).

Pharmaceutical Industry



National data

3° place

with 113 economic units

2° place

with 18.9% of national production

2° place

with 19.8% of foreign direct investment

> Stat

Statal data

1.9%

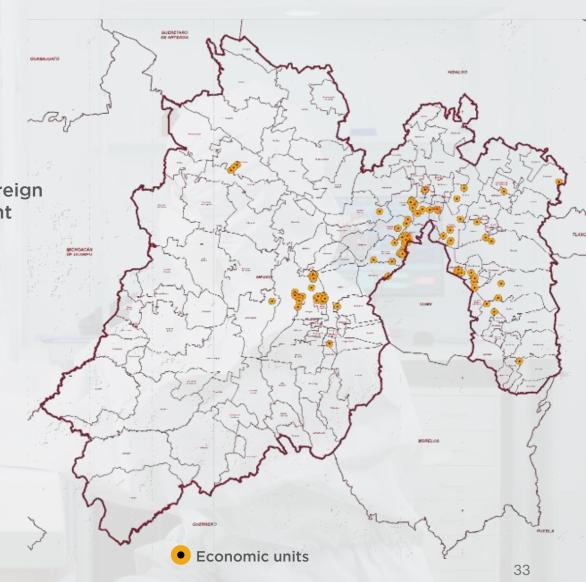
of the state's value added

13 mil 567

employed individuals

Sources:

- DENUE-INEGI, May 2024.
- •Economic Censuses-INEGI, 2019.
- •Ministry of Economy, 2006 2nd quarter of 2024.



Furniture Manufacturing



National data

2° place with 3 thousand 243 economic

1° place with 16.0% of national production

Statal data

units

0.7% of the state's value added

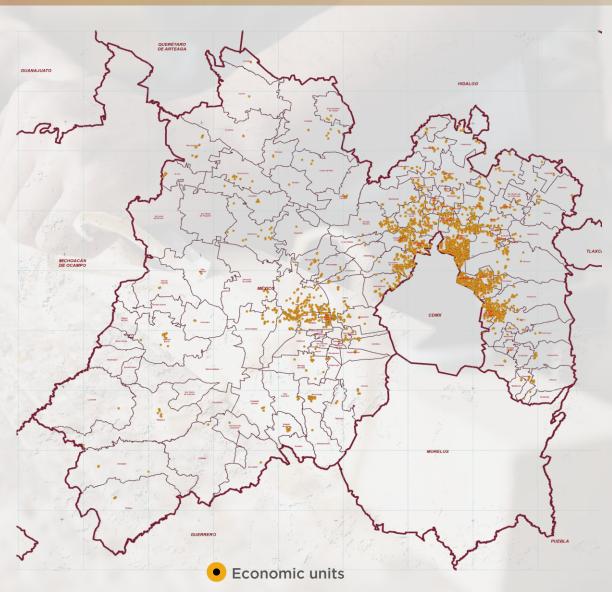
22 mil 336 employed individuals

0.2% of the state's exports

O.O3% of the state's foreign direct investment

Sources:

DENUE-INEGI, May 2024. Economic Censuses-INEGI, 2019. Ministry of Economy, 2006 – 2nd quarter of 2024





Commerce



National data

1° place

with 354 thousand 823 economic units

2° place

with 11.3% of national commerce

Statal data

24.0% of the state economy

+1.8
millon
employed
individuals

10.9% of foreign direct investment

Economic units 36

Sources:

DENUE-INEGI, May 2024.
GDP-INEGI, 2022.
ENOE-INEGI, 2nd quarter of 2024.
Ministry of Economy, 2006 – 1st quarter of 2024.

Logistics





Statal data

Main international logistics platform in Mexico

7.2% of the state's GDP 2 thousand 761 economic units

617 thousand 377 employed individuals

0.9% of foreign direct investment

Distribution centers operating in the entity



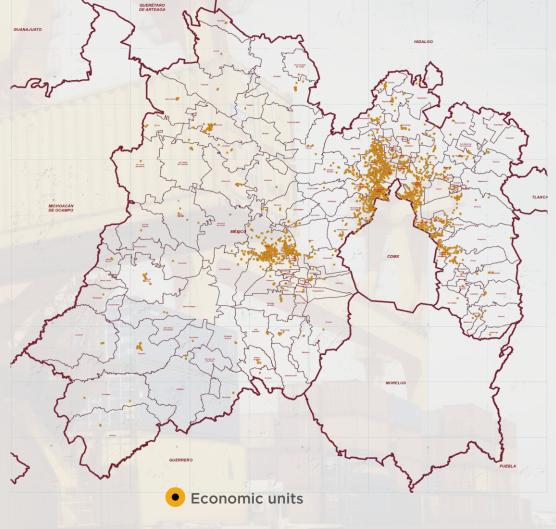








-DENUE-INEGI, mayo 2024; PIB-INEGI, 2022. ENOE-INEGI, 1° trimestre de 2024; Secretaría de Económica, 2006 – 1er trimestre de 2024



Financial Services



National data

2° place with 8 mil 753 economic units **3° place** with 6.9% of the antional GDP

Statal data

2.8% of the state economy

18 thousand 975 employed individuals 10.8% of foreign direct investment

Economic units

Sources:

DENUE-INEGI, May 2024. Economic Censuses of 2019. Ministry of Economy, 2006 – 2nd quarter of 2024..

Real Estate Services



National data

1° place

with 7 thousand 091 economic units 2° place

with 13.9% of the national GDP

Statal data

14.1% of the state economy

27 thousand 626

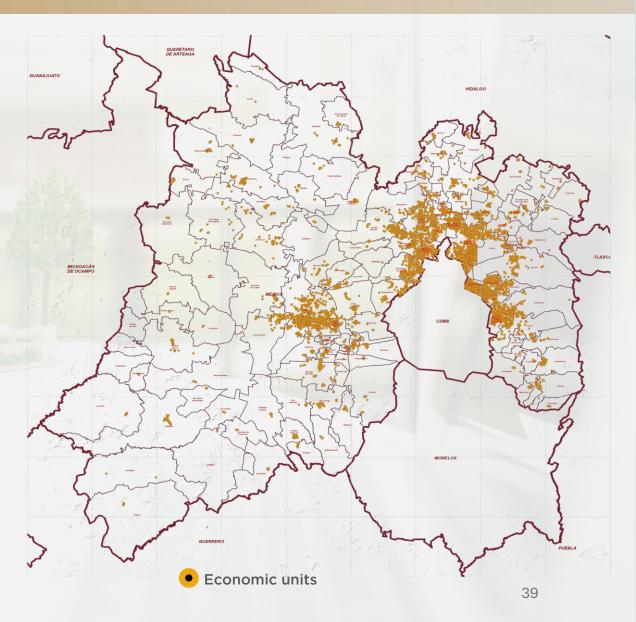
employed individuals

investment

1.0% of foreign direct

Sources:

DENUE-INEGI, May 2024. GDP-INEGI, 2022. Economic Censuses of 2019. Ministry of Economy, 2006 - 1st quarter of 2024



Waste Management



National data

1° place

with 12 thousand 395 economic units

5° place

with 5.4% of the national GDP

Statal data

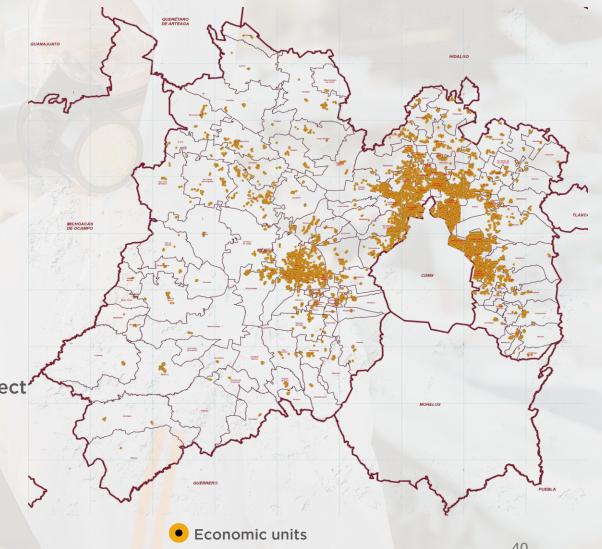
0.6% of the state economy

151 mil 476

employed individuals

0.1%

of foreign direct investment



Sources:

DENUE-INEGI, May 2024. GDP-INEGI, 2022. Economic Censuses of 2019. Ministry of Economy, 2006 – 1st quarter of 2024

Scientific and Technical Services



National data

2° place with 10 thousand 335 economic units

4° place

with 5.6% of the national GDP

Statal data

1.2% of the state's production

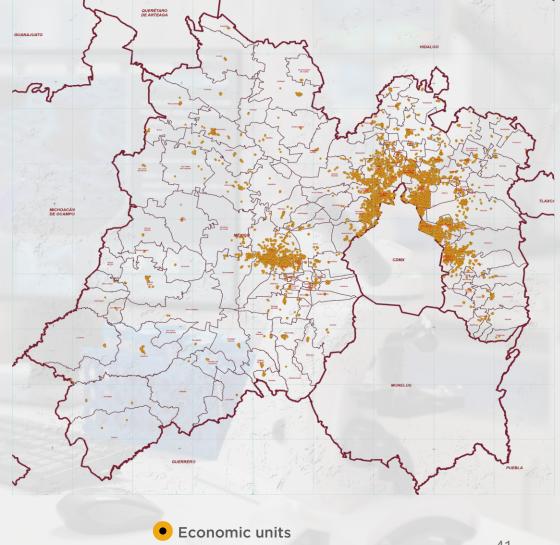
51 mil 183

personas ocupadas

0.3% of foreign direct investment

Sources:

DENUE-INEGI, May 2024. GDP-INEGI, 2022. Economic Censuses of 2019. Ministry of Economy, 2006 - 1st quarter of 2024



Distribution and Supply Units



Retail units

1° place

in grocery and miscellaneous stores, with, 88 thousand 615 (14.7%)

1° place

in department stores, with, 330 (11.4%)

1° place

in supermarkets, with 706 (11%)

3° place

in supermarkets, with, 3 thousand 534 (6.4%)

Supply Centers (CEDAS)

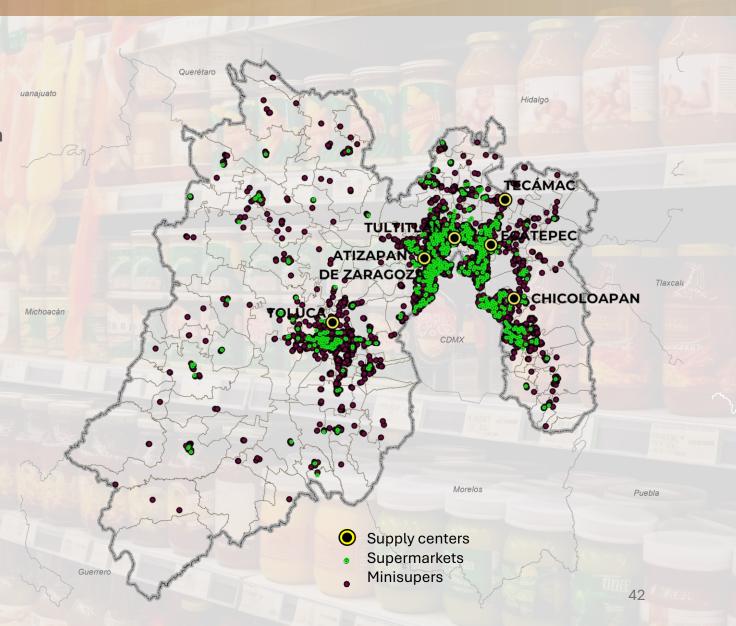
6 supply centers

Toluca, Ecatepec, Tultitlán, Atizapán de Zaragoza, San Vicente Chicoloapan y Tecámac

- 1,821 warehouses
- 1,680 comercial permises

Sources:

-Dirección General de Comercio, Gobierno del Estado de México, 2023.
 -DENUE-INEGI. 2022.



Distribution and Supply Units



Public Markets

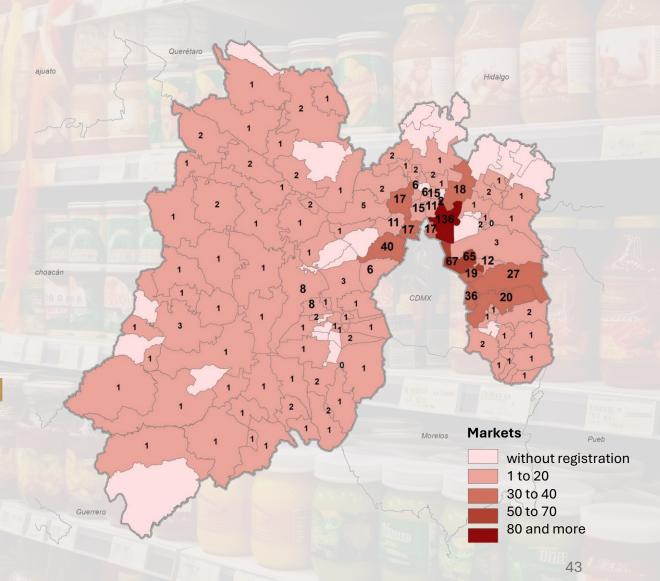
651 markets

- 509 municipalized
- 142 private

82 thousand 096
Comercial premises

Coverage
99 municipalities

59 thousand 620 tenants



Sources:

-Dirección General de Comercio, Gobierno del Estado de México, 2023.





Connectivity

2 international airports

Source: Agencia Federal de Aviación Civil. 2024. 39
heliports
Source: Agencia Federal de
Aviación Civil, 2024.

2
national
aerodromes
Source: Agencia Federal de

Aviación Civil, 2024.

electric vehicle charging points

in the central zone of Mexico (with CDMX) Source: Electromaps, sep 2024.



3 thousand 247 hospitals for outpatient consultation to hospitalization
Source: Secretaría de Salud, CLUES 2023.

15 thousand 687 hospital beds
Source: Secretaría de Salud, Ene 2023.

306
units with
hospitalization
Source: Secretaría de Salud, Ene 2023.

11 thousand 565 pharmacies
Source: DENUE, 2024.





Recreation

golf courses Source: Secretaría de Turismo, 2024.

sports stadiums of national and regional importance Source: SEDECO.

theaters and spaces for artistic, cultural, and sports events Source: DENUE-INEGI, 2023.

132 cinemas Source: DENUE-INEGI, 2023. 394 shopping malls Source: DGC, 2024.



Nature

15+77 national and state protected natural areas

Sistema Nacional de Áreas Protegidas (SINAP), 2024. Secretaría del Medio Ambiente y Desarrollo Sostenible-GEM, 2024.

parks for exploration and hiking Source: Secretaría de Turismo, 2024.

zoos and botanical gardens Source: Secretaría de Turismo, 2024.



Historical-Cultural

UNESCO World **Heritage Sites** Source: Secretaría de Turismo, 2024.

archaeological zones Source: Secretaría de Turismo, 2024.

12+25 magical/charming Towns Source: Secretaría de Turismo, 2024.

museums Source: Secretaría de Turismo, 2024.





Subsidies Nearshoring 2024



¿What is Nearshoring?



It is the relocation of companies seeking new investment horizons to get closer to their target market.

Some of the **benefits** they obtain when relocating include:

- transportation costs
- production costs in the new country
- trade agreements
- Relationship between the host country and the destination country
- financial and political matters.



Subsidies 2024

The Government of the State of Mexico, aiming to promote foreign investment and job creation, offers 2 subsidies to companies that relocate their employment sources to the State of Mexico:

ISERTP subsidy

100% subsidy for 60 months (following the start of operations).

Ecological tax subsidy

100% subsidy for 12 months (following the start of operations).

- Taxes on emissions of pollutants into the atmosphere.
- Ecological taxes on waste disposal, confinement, and storage.
- Taxes on emissions of pollutants into water.



Subsidies Nearshoring 2024



Subsidies provides by the State of Mexico



Strengthen social and economic development



Promote investment



Generate employment

About ISERTP

About ecological tax subsidy

About lodging taxes



Subsidies tha remain at 100%

Those hiring workers:

- Aged 60 years or older.
- Newly incorporated into the labor market.
- Of indigenous origin.
- Released due to the Amnesty Law.
- Single mothers.



iNew! 100% to promote nearshoring

- Companies that relocate or start operations in the State of Mexico
- Companies that increase their workforce



iNew! 100% for vulnerable individuals

- Domestic workers
- Repatriated compatriots



iNew! 50% for companies that implement a Waste Management Plan



iNew! to promote Nearshoring



iNew! to promote tourism

To individuals with stays exceeding 15 consecutive days in the region



Nearshoring Investment September 2023- August 2024



- In this period, 16 projects have been identified with an amount of 3,522.96 MDD that could be related to the Nearshoring phenomenon.
 - ❖ This represents **53.1%** of the investment amount of 6,631 MDD.

Investment by country of origin

- Of the 3,522.96 MDD raised by Nearshoring during the period from September 2023 to August 2024, 70.7% came from the United States.
- The remaining 29.3%, equivalent to 1,032.94 MDD, came from 5 countries:
 - Germany with 347.11 MDD (9.9%).
 - France with 320 MDD (9.1%).
 - Ireland with 300 MDD (8.5%).
 - Japan with 53.84 MDD (1.5%).
 - ❖ Sweden with 11.99 MDD (0.3%).



Nearshoring Investment September 2023- August 2024

- **Investment by Sector of Economic Activity**
 - Of the 3,522.96 MDD raised by Nearshoring during the period from September 2023 to August 2024, 91.5% was concentrated in three sectors;
 - ❖ Automotive with 2,421 MDD (68.7%).
 - ❖ Industrial park developments with 481 MDD (13.7%).
 - ❖ Energy with 320 MDD (9.1%).
 - Others with \$300 MDD (8.5%).



Annexes

Decree LIEM 2024



Article 10.- Taxpayers obligated to pay the tax on expenditures for personal labor remuneration will enjoy a 100% subsidy under the following terms and conditions:

- I. For the 60 months following the generation of employment, hiring, relocation, or start of operations, as the case may be, for the following taxpayers:
 - a. Companies that relocate their sources of employment from any Federal Entity other than the State of Mexico to this Entity during the fiscal year 2024.
 - b. Taxpayers who begin operations with their source of employment and fiscal domicile in the State of Mexico during the Fiscal Year 2024.
 - c. Those who, during the Fiscal Year 2024, increase their workforce. In this case, the subsidy will consider the tax generated concerning the new positions, taking as a base the highest declared workforce during the Fiscal Year 2023. It will apply only to the jobs created during the Fiscal Year 2024, above the mentioned workforce, and that meet the conditions established for this purpose.

Article 20.- For Fiscal Year 2024, the subsidy on the payment of Ecological Taxes is authorized under the following terms:

I. To taxpayers who start operations with their workplaces at their fiscal domicile in the State of Mexico, during Fiscal Year 2024, a 100% subsidy for the 12 months following the initiation on the tax of the Emission

