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Mexico:
Where Opportunity Meets Profit

April 2025



2025 Año de La Mujer Indígena

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II. Competitive Advantages

III. Economic Integration

IV. Plan México

V. Tax Incentives



2025 Año de La Mujer Indígena

Overview of Mexico's Economic Strength

- Mexico ranks as the **12th largest economy globally**, with a GDP of $1.8 trillion.[1] **Economic growth is forecasted at 2.1% in 2024 and 2.3% in 2025.**[2]

- The IMF highlights Mexico's **robust macroeconomic policies and resilience against global risks**. Additionally, its strategic position makes it a key beneficiary of global supply chain shifts, **attracting record Foreign Direct Investment (FDI)** and driving sustainable growth.[3]

- The **government's fiscal deficit is projected to decrease** from 5.9% of GDP in 2024 to 3.9% in 2025, reducing borrowing needs from MXN $1.99 trillion to MXN $1.43 trillion.[4]



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1/ International Monetary Fund, "World Economic Outlook Database," last modified October 2024, accessed January 2, 2025, https://www.imf.org/external/datamapper/NGDPD@WEO/OEMDC/ADVEC/WEOWORLD.
2/ Centro de Estudios de las Finanzas Públicas, *"Paquete Económico 2025, Criterios Generales de Política Económica,"*published November 20, 2024, accessed January 3, 2025, https://www.cefp.gob.mx/indicadores/gaceta/2024/iescefp0462024.pdf.
3/ International Monetary Fund. Western Hemisphere Dept. "Mexico: 2024 Article IV Consultation and Review Under the Flexible Credit Line Arrangement-Press Release; Staff Report; and Statement by the Executive Director for Mexico", *IMF Staff Country Reports* 2024, 317 (2024), accessed January 3, 2025, https://doi.org/10.5089/9798400292620.002
4/ Centro de Estudios de las Finanzas Públicas, *"Paquete Económico 2025: Aspectos Relevantes de Finanzas Públicas,"*published November 15, 2024, accessed January 6, 2025, https://www.cefp.gob.mx/publicaciones/documento/2024/cefp0422024.pdf.

Overview of Mexico's Economic Strength

- **Inflation** is projected to **decline** to 3.8% in 2025, remaining within Mexico's central bank (Banxico) target range of 3% ± 1%.[1] As an **independent institution,** Banxico ensures **stable monetary policy**, fostering investor confidence through transparency and autonomy.

- **Total trade exceeded $1 trillion**. Exports to the U.S. were 83% non-oil, with automotive products making up 35.7% of manufacturing exports.[2]

- **Pro-investment policies and trade agreements**, including the Mexico-USA-Canada Agreement (**USMCA**) and the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (**CPTPP**), bolster Mexico's position as a nearshoring hub.



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1/ Centro de Estudios de las Finanzas Públicas, *"Paquete Económico 2025, Criterios Generales de Política Económica,"*published November 20, 2024, accessed January 3, 2025, https://www.cefp.gob.mx/indicadores/gaceta/2024/iescefp0462024.pdf.
2/ Banco de México, *"Balanza de productos manufacturados -no maquila-,"* accessed January 6, 2025, https://www.banxico.org.mx/SieInternet/consultarDirectorioInternetAction.do?sector=1&accion=consultarCuadroAnalitico&idCuadro=CA180&locale=es.

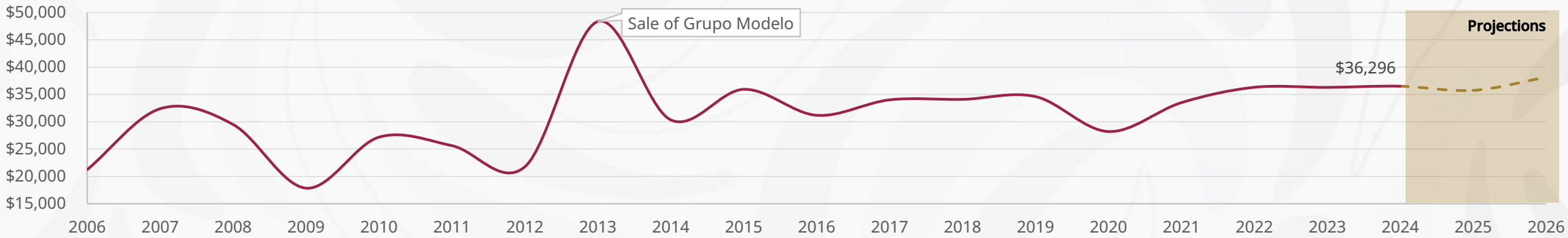
I. Trade & Investment



Foreign Direct Investment Trends[1]

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Figure 1. Foreign direct investment flows to Mexico (2006-2023) (Million USD)



Note: The FDI projections for 2024, 2025, and 2026 are based on Mexico's Central Bank Survey of Expectations from Private Sector Economic Specialists, published December 16, 2024.

- **9th-largest FDI recipient in the world**
- **3rd among OECD member countries**
- **4th in the Americas**
- **2nd in Latin America**



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1/ Secretaría de Economía, "Informe Estadístico sobre el Comportamiento de la Inversión Extranjera Directa en México (Tercer Trimestre de 2024)," published November 15, 2024, accessed January 6, 2025, https://www.gob.mx/cms/uploads/attachment/file/963441/Informe_Congreso_2024_3T.pdf.

Foreign Direct Investment Trends[1]

Figure 1. Foreign direct investment inflows to Mexico by country 2018-2023 (Millions USD)

Country of Origin	Total FDI (2018-2023)	%
United states	$80,514	39.7
Spain	$23,657	11.7
Canada	$20,274	10.0
Germany	$13,365	6.6
Japan	$11,944	5.9
Total	$203,042	100

Figure 2. Foreign direct investment inflows to Mexico by economic sector 2018-2023 (Millions USD)

Economic Sector	Total FDI (2018-2023)	%
Industrial	$103,102	50.8
Services	$72,008	35.5
Extractive	$15,900	7.8
Commerce	$10,931	5.4
Agriculture	$1,099	0.5
Total	**$203,042**	**100**



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1/ Secretaría de Economía, "Informe Estadístico sobre el Comportamiento de la Inversión Extranjera Directa en México (Tercer Trimestre de 2024)," published November 15, 2024, accessed January 6, 2025, https://www.gob.mx/cms/uploads/attachment/file/963441/Informe_Congreso_2024_3T.pdf.

Foreign Direct Investment Trends

As of the closing of 2024, million current dollars

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By December of 2024, Mexico recorded FDI of 36,872 million USD, a figure 2.3 percent higher compared to that reported for the same period in 2023.

FDI Integration Q4 2024

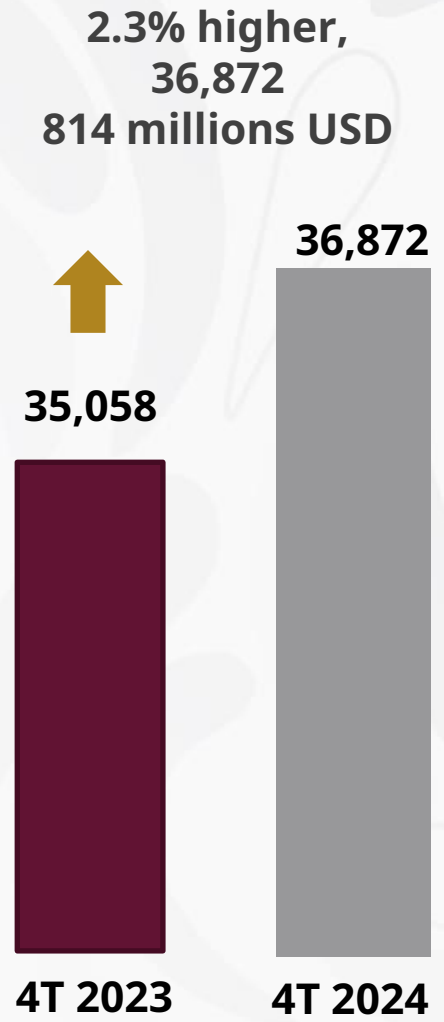
3,956
Mexican Companies with FDI

5,598
Trust Agreements

35
Foreign Legal Entities



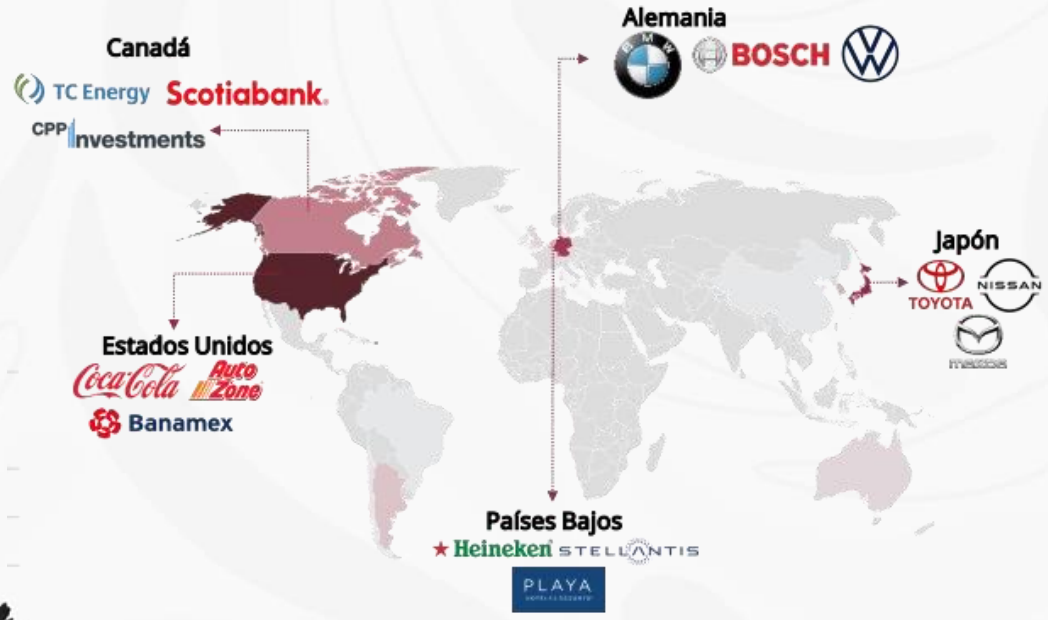
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Foreign Direct Investment Trends[1]

By country of origin in 2024, million current dollars

The United States remains Mexico's primary investment partner, accounting for 45% of total flows. For this period, Japan and Germany occupy the second and third places, respectively; both are long-standing trading partners in our country.



FDI Q4 2024
36,872 millions USD

Figure 1. Top 5 countries with the highest FDI in Mexico

Country of origin	FDI 2024	%	Change in position compared to 2023
Top 5	**26,683**	**81%**	
USA	16,513	45%	Same
Japan	4,285	12%	▲ 2
Germany	3,788	10%	▲ 2
Canada	3,216	9%	▼ 1
Netherlands	1,881	5%	▲ 3



2025 Año de La Mujer Indígena

1/ Secretaría de Economía, "Informe Estadístico sobre el Comportamiento de la Inversión Extranjera Directa en México (Tercer Trimestre de 2024)," published November 15, 2024, accessed January 6, 2025, https://www.gob.mx/cms/uploads/attachment/file/963441/Informe_Congreso_2024_3T.pdf.

Foreign Direct Investment Trends[1]

By federal entity in 2024, million current dollars

FDI Q4 2024
36,872 millions USD

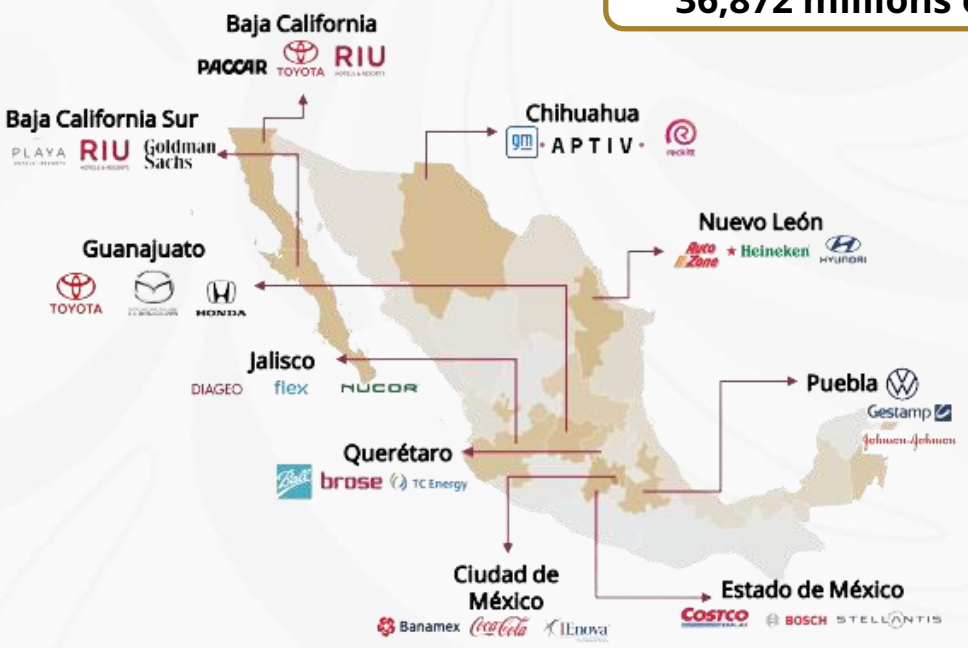


Figure 1. Top 10 entities with the highest FDI in Mexico

Federal Entity	FDI 2024	%	Change in position compared to 2023
Top 10	**29,261**	**79%**	
1. Ciudad de México	14,427	39%	Same
2. Estado de México	2,642	7%	▲ 4
3. Baja California	2,479	7%	▲ 4
4. Nuevo León	2,098	6%	▼ 1
5. Chihuahua	1,497	4%	Same
6. Guanajuato	1,442	4%	▲ 8
7. Baja California Sur	1,353	4%	▲ 4
8. Puebla	1,168	3%	▲ 16
9. Jalisco	1,100	3%	▼ 5
10. Querétaro	1,055	3%	Same

79% of the FDI received in the fourth quarter of 2024 was concentrated in ten federal entities of the country.



1/ Secretaría de Economía, "Informe Estadístico sobre el Comportamiento de la Inversión Extranjera Directa en México (Tercer Trimestre de 2024)," published November 15, 2024, accessed January 6, 2025, https://www.gob.mx/cms/uploads/attachment/file/963441/Informe_Congreso_2024_3T.pdf.

Foreign Direct Investment Trends

By sector in 2024, million current dollars and percentage

FDI Q4 2024
36,872 millions USD

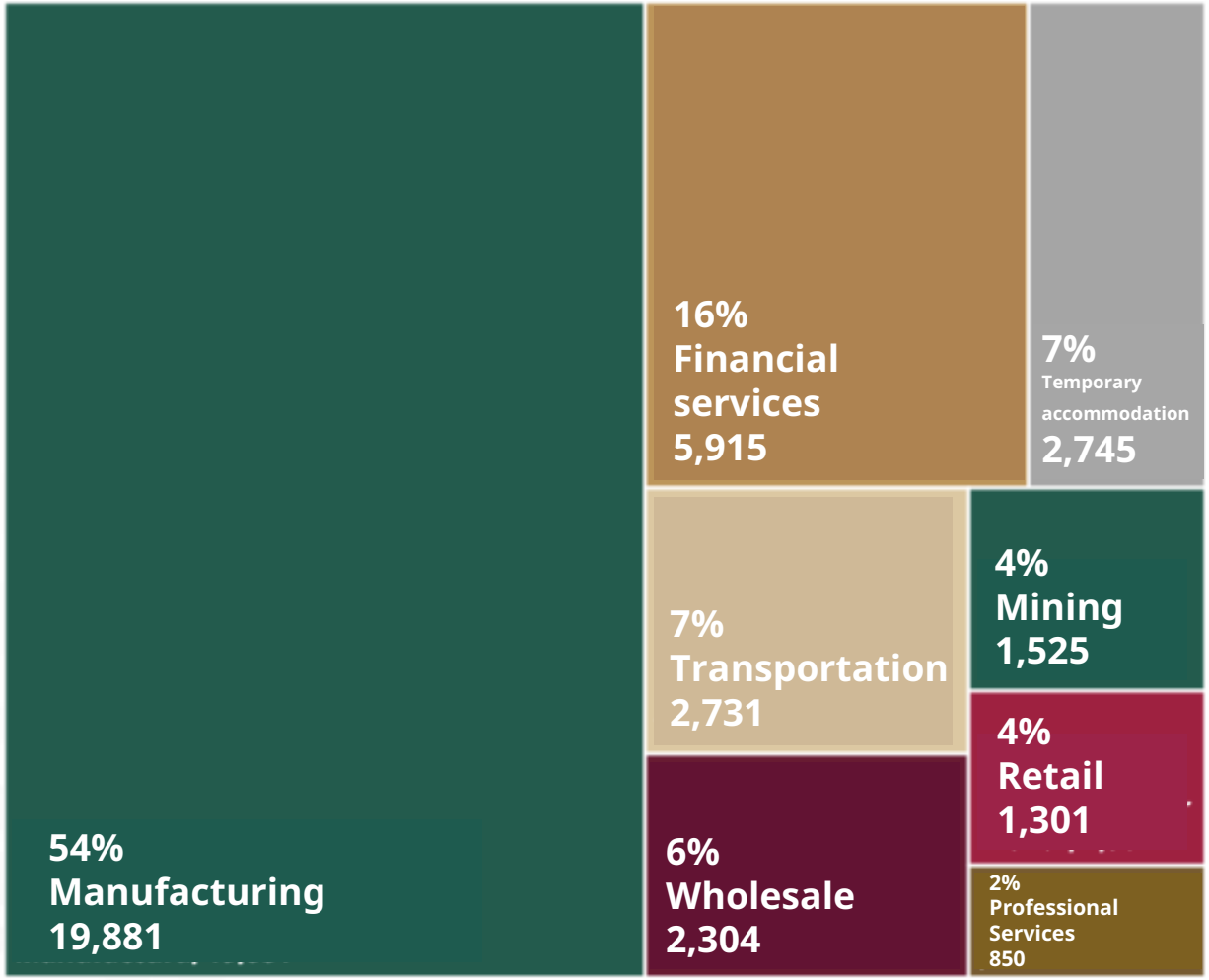
Mexico is a hub for specialized manufacturing that requires increasing capital as demand grows in its industries, both nationally and internationally.

54% of FDI corresponds to the manufacturing sector, with the following main industries:

- Transportation equipment (50%)
- Beverages and tobacco (20%)
- Computer equipment (9%)
- Chemical (6%)
- Basic metal industries (4%)

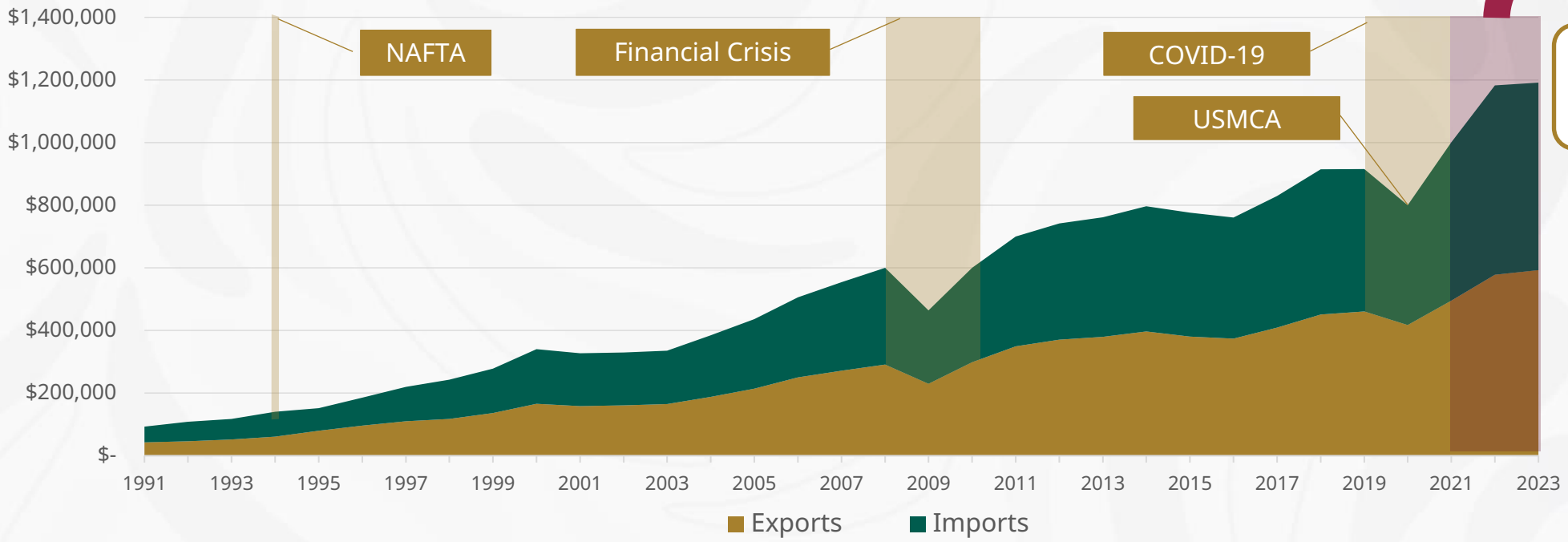


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Mexico is an Exporting Powerhouse[1]

Figure 1. Mexico's exports and imports (Millions USD, 1991-2023)



Consecutive export records
(2021, 2022, and 2023)

>1,000
Billion USD
Total Trade
(2021, 2022 and 2023)

≈600
Billion USD
Exports
(2023)

This consistent export growth has positioned Mexico as the **9th largest exporter worldwide**



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1/ Banco de México, "Balanza comercial de mercancías de México (sin apertura de maquiladoras)," accessed January 2, 2025, https://www.banxico.org.mx/SieInternet/consultarDirectorioInternetAction.do?sector=1&accion=consultarCuadroAnalitico&idCuadro=CA176&locale=es.

… and a Leader in Key Sectors

Automotive[1]	**3rd** largest exporter worldwide
Medical Devices[1]	**4th** largest exporter worldwide
Agribusiness[2]	**4th** largest exporter worldwide
Metal mechanics[1]	**10th** largest exporter worldwide
Electronic[1]	**10th** largest exporter worldwide
Aerospace[3]	**12th** largest market worldwide
Pharmaceutical[4]	**12th** largest market worldwide
Processed food[5]	**9/10 leading companies** have a presence in Mexico



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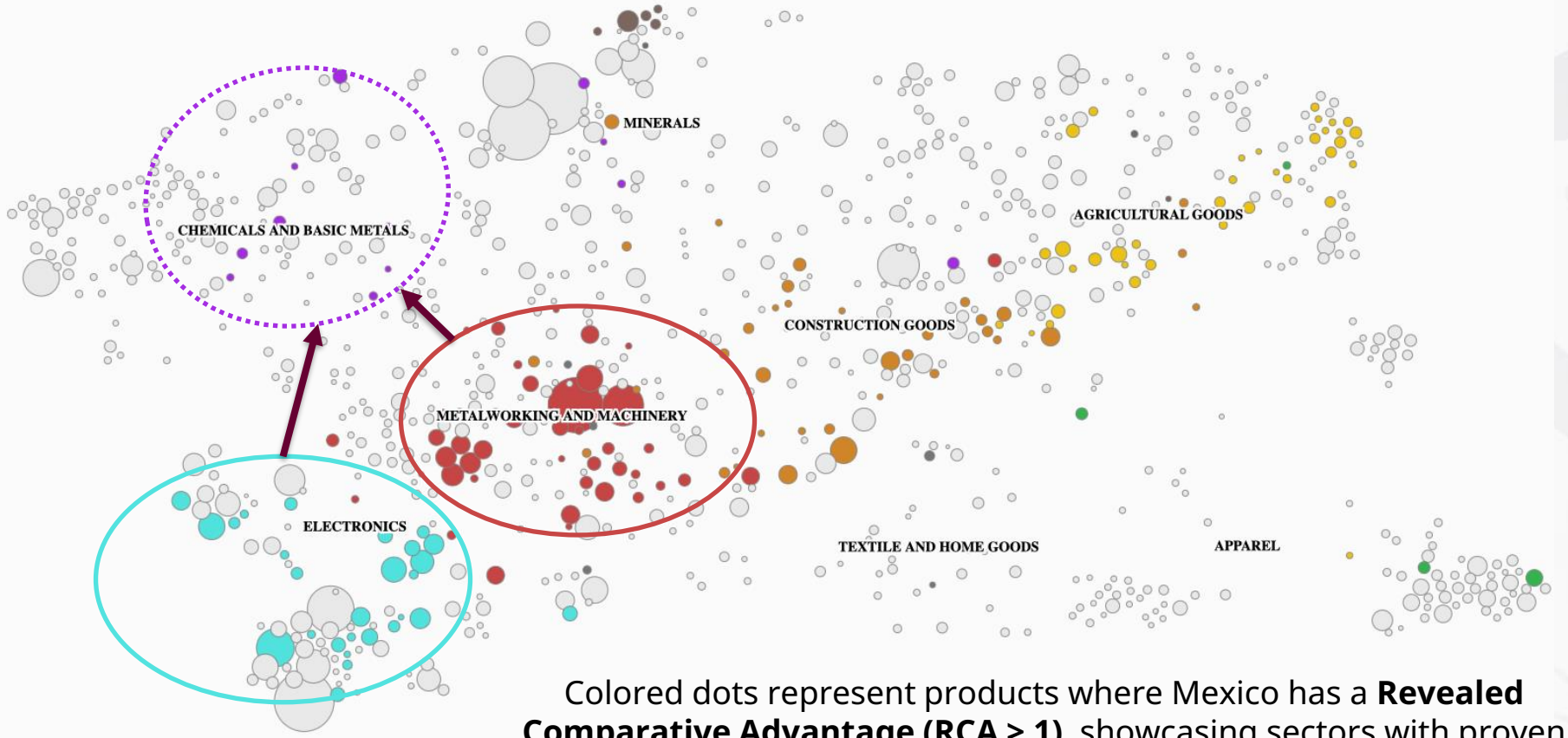
1/ Secretaría de Economía, "Balance económico 2024: Industria, comercio e inversiones," accessed January 7, 2025, https://www.gob.mx/se/prensa/balance-economico-2024-industria-comercio-e-inversiones?idiom=es
2/ Secretaría de Agricultura y Desarrollo Rural, "México, estrella productora y exportadora," accessed January 7, 2025, https://www.gob.mx/agricultura/es/articulos/mexico-estrella-productora-y-exportadora
3/ Federación Mexicana de la Industria Aeroespacial, A.C., "Conoce la Industria," accessed January 7, 2025, https://femiamx.com/#!/-conoce-la-industria-2/
4/ Sistema de Cuentas Nacionales, INEGI., "Industria Farmacéutica," accessed January 7, 2025, https://www.gob.mx/cms/uploads/attachment/file/119065/Sector_Industria_Farmaceutica.pdf
5/ Secretaría de Agricultura y Desarrollo Rural, "Principales exportaciones de México," accessed January 7, 2025, https://www.gob.mx/agricultura/articulos/principales-exportaciones-de-mexico#:~:text=M%C3%A9xico%20cuenta%20con%20caracter%C3%ADsticas%20privilegiadas,al%20campo%20como%20un%20%23OrgulloDeM%C3%A9xico

Mexico's Economy has a Strong Base in Manufacturing with Potential for Higher Complexity Growth

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Mexico's export economy is anchored in **high-complexity clusters** like metalworking and electronics, reflecting a robust industrial base.

Proximity to nearby products in chemicals and pharmaceuticals signals **opportunities to expand into other complex sectors**.



Colored dots represent products where Mexico has a **Revealed Comparative Advantage (RCA > 1)**, showcasing sectors with proven global competitiveness.



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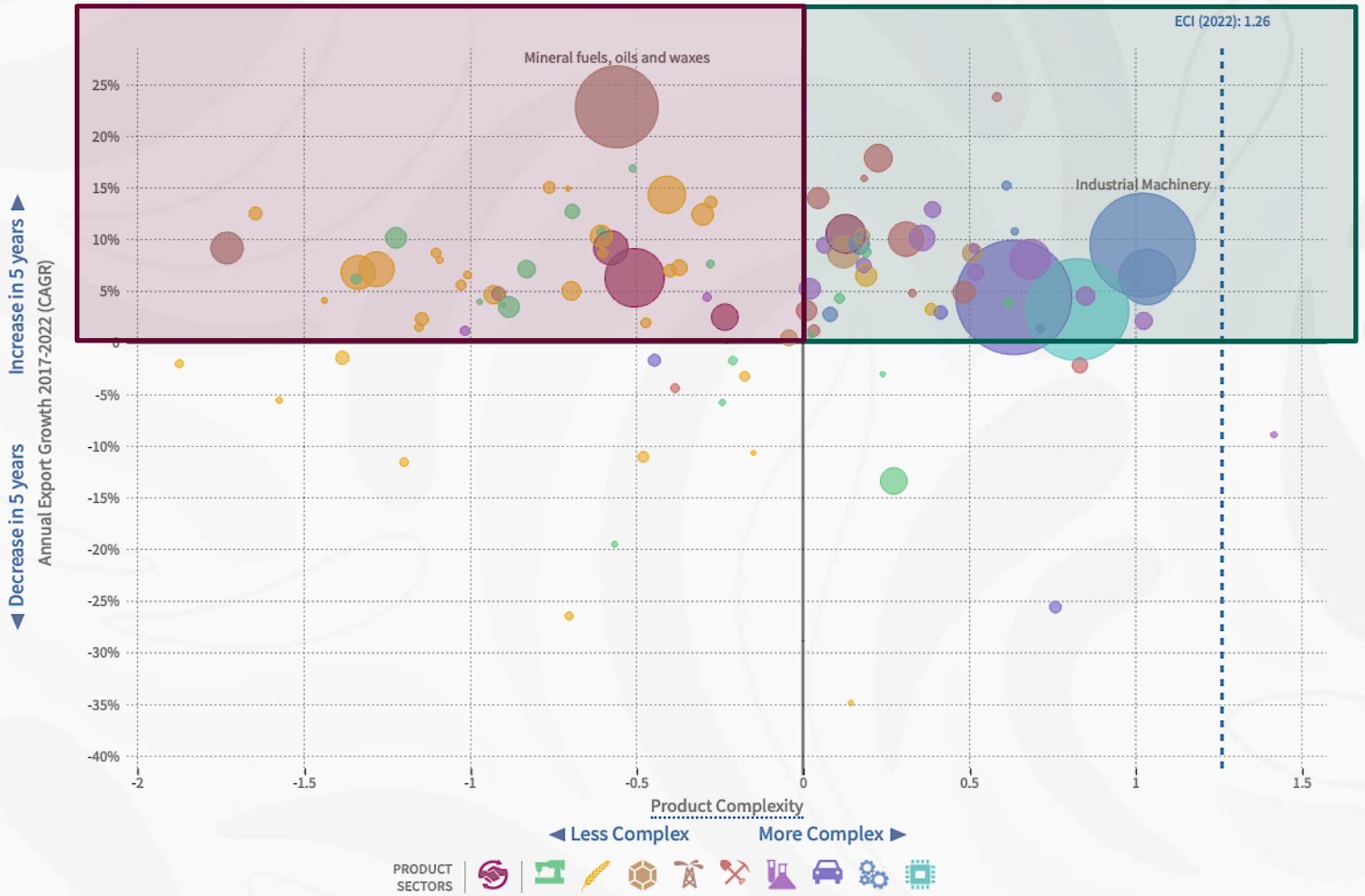
1/ Harvard Growth Lab, *"Mexico Product Space,"* accessed January 6, 2025, https://atlas.hks.harvard.edu/explore/productspace?exporter=country-484.

Mexico has Advanced in Global Economic Complexity

Rising from 30th in 1995 to 21st in 2022

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- High-growth, high-complexity sectors, like industrial machinery, showing strong growth.
- Large trade value with potential for further growth but moderate complexity.





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1/ Harvard Growth Lab, *"Mexico Growth Dynamics,"* accessed January 6, 2025, https://atlas.hks.harvard.edu/countries/484/growth-dynamics.

II. Competitive Advantages



Youthful and Skilled Workforce[1]

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10º

10th most populous country.
(>130M people)

+60M

Over 60 million economically active individuals

29y

Median age of 29 years

175K

+175K STEM graduates in 2023
(+70% in engineering, manufacturing, and construction)

Top 10
OECD

Among top 10 OECD countries for STEM graduates
(2nd for technical graduates and 4th for professional graduates)



2025 Año de La Mujer Indígena

1/ Secretaría de Economía, Subsecretaría de Comercio Exterior, *El Poder del Talento Mexicano: Transformando regiones,* Ciudad de México, 2024, accessed January 6, 2025, https://www.gob.mx/cms/uploads/attachment/file/947099/Talento_mexicano_2da_edicion.pdf.

Robust Infrastructure Network

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118
Ports and Terminals

50
Custom Offices
(18 with the U.S.)

+27,500km
Railway Network

80
Airports
(65 International)

+189,000km
Road Network



1/ Secretaría de Economía, Invierte en México: El momento mexicano, published September 2024, accessed January 6, 2025, https://www.gob.mx/cms/uploads/attachment/file/947098/Inversion_2da_version_ESP_a.pdf.

Harnessing Renewable Energies to Drive a Sustainable Future

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Mexico aimed to generate at least 35% of its energy from clean and renewable sources by 2024, with 80.1% of new capacity by 2038 projected to come from clean energy and storage systems.[1]

Between 2024 and 2030, Mexico will add 194 transmission projects and 135 distribution projects, including **5,719 km of new transmission lines**, to strengthen its energy infrastructure and support growing demand.[1]

16%
of total capacity added by 2027
solar

Mexico has an annual average solar insolation of approximately 5.5 kWh/m²/day, making it one of the countries with the greatest potential for solar energy generation in the world.[2]

20%
of total capacity added by 2027
wind

Mexico possesses exceptional wind resources, particularly in the Isthmus of Tehuantepec, one of the world's windiest regions with average speeds of 8–10 m/s. The country has the potential to double its current installed wind capacity.[3]



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1/ Juan Carlos García de la Cadena Gómez, *"¿Cuánto potencial para la generación de energía solar hay en México?"* Beetmann Sustainable Future, published May 11, 2023, accessed January 6, 2025, https://beetmann.com/cuanto-potencial-para-la-generacion-de-energia-solar-hay-en-mexico/.
2/ Secretaría de Energía, *"Programa de Desarrollo del Sistema Eléctrico Nacional (PRODESEN) 2024-2038,"* accessed January 6, 2025, https://www.cenace.gob.mx/Docs/16_MARCOREGULATORIO/Prodecen/20%202024-2038%20Cap%C3%ADtulos%201%20al%206.pdf.
3/ Asociación Mexicana de Energía Eólica, "Inicio," accessed January 6, 2025, https://amdee.org/es_es/home-2/.

Strengthening Security to Foster Investment Confidence

Key pillars

- Consolidating Mexico's National Guard to ensure law enforcement efficiency
- Addressing root causes of violence
- Enhancing intelligence and investigation capabilities
- Ensuring seamless coordination between federal and state entities

Objectives

- Reducing organized crime and high-impact offenses
- Neutralizing violence generators and dismantling criminal networks
- Focused attention on high-incidence zones
- Strengthening actions to apprehend key violence instigators in each region

Decrease in homicides[1]

-22.4%

Between September 2024 and March 2025



2025 Año de La Mujer Indígena

1/ Presidencia de la República, "Versión estenográfica: Presidenta destaca reducción de 19 homicidios dolosos diarios de septiembre 2024 a marzo 2025, gracias a la Estrategia Nacional de Seguridad," accessed March 31, 2025, https://www.gob.mx/presidencia/prensa/presidenta-destaca-reduccion-de-19-homicidios-dolosos-diarios-de-septiembre-2024-a-marzo-2025-gracias-a-la-estrategia-nacional-de-seguridad?idiom=es

Security: Improvements and Opportunities for Investment

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Mexico has implemented various strategies to strengthen security, creating a more stable investment environment:

Security perceptions

- Decrease in perceived insecurity from **73.7% in 2018 to 61.7% in 2024**[1]
- Downward trend in states with the highest perception of insecurity.[2]
- As of January 2025, **federal crimes decreased by 39.5%,** while **common law crimes dropped by 44.3% in theft** and **32.7% in firearm discharges.**[3]

Business security and confidence

- **39% of companies feel safer** than the previous year (vs. 17% in 2023).[4]
- This improvement is related to an **increase investments in internal security by the private sector**. [4]

Strategic security protection

- **80% coverage** of the Tourist Police in Mexico City.[5]
- **217,000 Armed Forces personnel** deployed throughout the country. [3]
- **143,169 state and municipal police officers** are reinforcing security in different regions.[6]

Financial investigation and intelligence

- Creation of the **National System of Investigation and Intelligence** to improve institutional coordination.
- **12 intelligence and investigation units** operating in strategic areas.
- Collaboration between the FIU, FBI, and FinCEN to **identify *Business Email Compromise (BEC)*** fraud.



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1/ ENSU 2018 and 2024, accessed March 31, 2025, shttps://www.inegi.org.mx/app/saladeprensa/noticia/9587 and chrome-extension://efaidnbmnnnibpcajpcglclefindmkaj/https://www.inegi.org.mx/contenidos/programas/ensu/doc/ensu2018_diciembre_presentacion_ejecutiva.pdf
2/ Presidencia de la República, Informe de Seguridad 25 de marzo de 2025, accessed March 31, 2025, https://www.gob.mx/presidencia/es/articulos/version-estenografica-conferencia-de-prensa-de-la-presidenta-claudia-sheinbaum-pardo-del-25-de-marzo-de-2025
3/ Presidencia de la República, Informe de seguridad 9 de enero 2025, accessed March 31, 2025, https://www.gob.mx/presidencia/articulos/version-estenografica-conferencia-de-prensa-de-la-presidenta-claudia-sheinbaum-pardo-del-9-de-enero-de-2025-387640
4/ Sondeo de seguridad Empresarial AMCHAM, accessed March 31, 2025, https://amcham.org.mx/files/Envios/Eventos24/Sondeo/KitAliados/10o_Sondeo_de_Seguridad_Empresarial_AMCHAM.pdf
5/ Comunicado 2940 Policía Turística noviembre 2022, accessed March 31, 2025, https://www.ssc.cdmx.gob.mx/comunicacion/nota/2940-la-policia-turistica-de-la-ssc-celebro-su-tercer-aniversario-de-brindar-auxilio-visitantes-nacionales-y-extranjeros-en-la-ciudad-de-mexico#:~:text=Asimismo%2C%20destac%C3%B3%20que%20la%20unidad,la%20ciudad%3A%20centro%2C%20sur%20y
6/ Censo Nacional de Seguridad Pública Estatal, accessed March 31, 2025, https://www.inegi.org.mx/programas/cnspe/2024/

III. Economic Integration



31 Bilateral Investment Treaties (BIT) with 30 Countries[1]

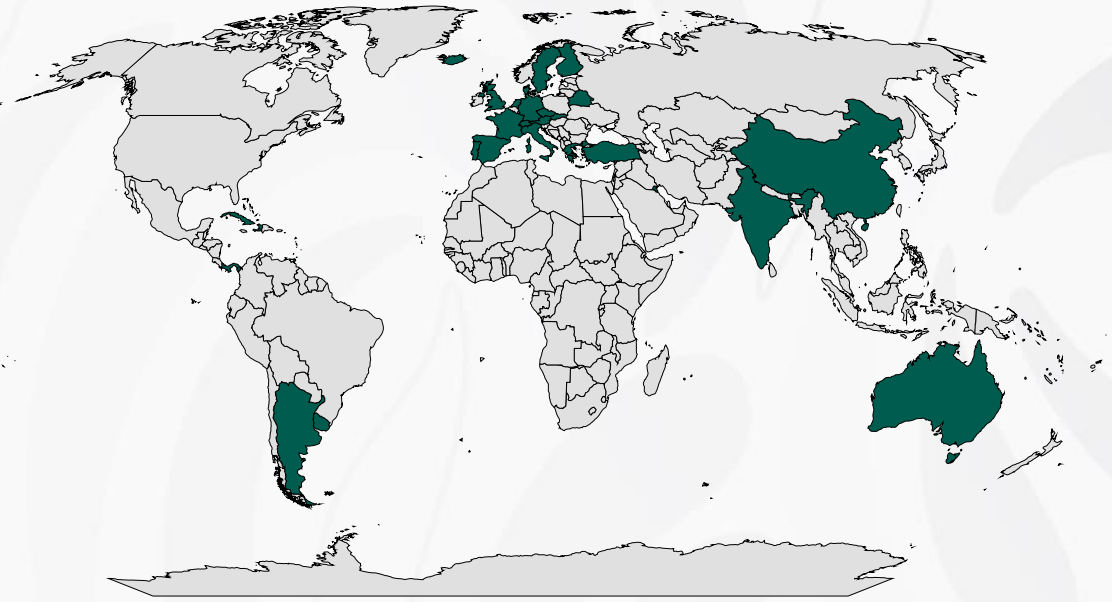
BITs are international treaties designed with the purpose of promoting international investment flows and providing certainty to the operations carried out by foreign investors.

Key benefits of BITs

1. Level playing field for competition.
2. Legal protection for investors and investments.
3. Guaranteed control over investments.
4. Investor-State dispute resolution mechanism.

Mexico ranks 3rd in the Americas for BITs in force, leading North America and closely behind Chile and Argentina in Latin America.

Figure 1. Countries with a BIT with México (2025)



Argentina, Australia, Austria, Bahrain, Belarus, Belgium-Luxembourg Economic Union, China, Cuba, Czech Republic, Denmark, Finland, France, Germany, Greece, Haiti, Iceland, India, Italy, Korea, Kuwait, Netherlands, Panama, Portugal, Singapore, Slovakia, Spain, Sweden, Switzerland, Trinidad and Tobago, Turkey, United Kingdom, and Uruguay.



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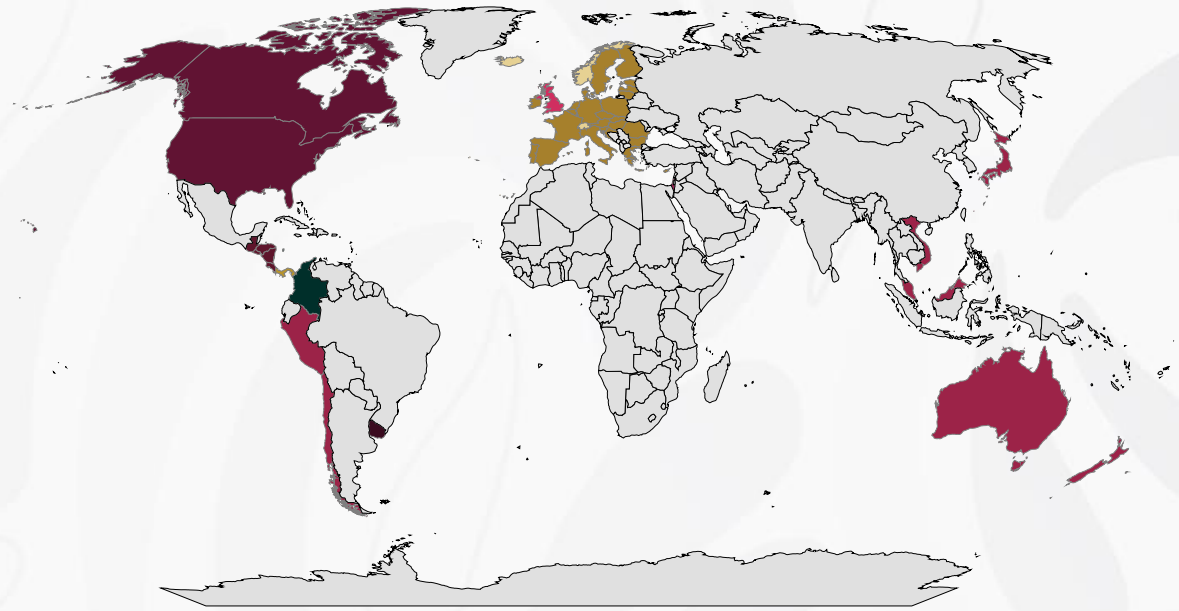
1/ United Nations Conference on Trade and Development, "International Investment Agreements Navigator," accessed January 6, 2025, https://investmentpolicy.unctad.org/international-investment-agreements/by-economy.

Mexico's Free Trade Agreements (FTAs)

Preferential access to 51 countries[1]

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Figure 1. Countries with FTA with Mexico (2025)



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Key benefits of FTAs

1. Connects Mexico to broader markets with reduced trade barriers.
2. Enhances competitiveness for Mexican exports.
3. Grants access to a wider variety of products and services.
4. Promotes technology transfer and collaboration across sectors.
5. Strengthens Mexico's role in global value chains.



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1/ Secretaría de Economía, "Invierte en México: El momento mexicano," published September 2024, accessed January 6, 2025, https://www.gob.mx/cms/uploads/attachment/file/947098/Inversion_2da_version_ESP_a.pdf.

Mexico's Free Trade Agreements (FTAs)

Preferential access to 1.3 billion consumers[1]

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Details for Major FTAs[2]

USMCA [enforced in 2020]
(3 countries)
- $1.6 trillion USD in trade (2023)
- 509 million consumers

CPTPP [enforced in 2018]
(11 countries across 3 continents)
- $78 billion USD in trade (2021)
- 697 million consumers

EFTA [enforced in 2000]
(5 countries)
- $45 billion USD in trade (2022)
- 147 million consumers

EU-MEXICO FTA [enforced in 2000]
(27 countries)
- $89 billion USD in trade (2023)
- 481 million consumers



2025 Año de La Mujer Indígena

1/ Secretaría de Economía, "Invierte en México: El momento mexicano," published September 2024, accessed January 6, 2025, https://www.gob.mx/cms/uploads/attachment/file/947098/Inversion_2da_version_ESP_a.pdf.
2/ Information on consumer by FTA comes from: U.S. Census Bureau, "International Database," accessed January 6, 2025, https://www.census.gov/datatools/demo/idb/#/table?dashboard_page=country&COUNTRY_YR_ANIM=2025&CCODE_SINGLE=*AY&subnat_map_admin=ADM1&CCODE=*AY,**&menu=tableViz&TABLE_YEARS=2025&TABLE_USE_RANGE=N&TABLE_USE_YEARS=Y&TABLE_STEP=1&TABLE_ADD_YEARS=2025&quickReports=CUSTOM&CUSTOM_COLS=POP.

The USMCA Heralds a New Era of Trade and Business in North America

Gobierno de México | Relaciones Exteriores Secretaría de Relaciones Exteriores | Economía Secretaría de Economía

Automotive components cross the Mexico-USA border 7-8 times before a vehicle is fully completed, showcasing deeply integrated supply chains.

$3 millions USD traded every **minute** in North America.[1]



2025 Año de La Mujer Indígena

1/ Center for Strategic and International Studies, *"The USMCA Strategic Initiative,"* accessed January 6, 2025, https://www.csis.org/programs/americas-program/usmca-strategic-initiative.

The USMCA Establishes Innovative Rules to Address 21st-Century Challenges

- **Streamlines customs procedures**, reducing processing times, increasing transparency, and enhancing cross-border efficiency.
- Facilitates **SME access to international markets** through digital trade and reduced compliance costs.
- **Strengthens labor and environmental standards** to ensure sustainable growth and responsible practices.
- Supports **integrated regional supply chains** in key industries like semiconductors, automotive, and agriculture.
- Establishes a **robust framework for data protection, e-commerce, and technology-driven trade**.
- Provides a **transparent and reliable** system for resolving trade disputes.

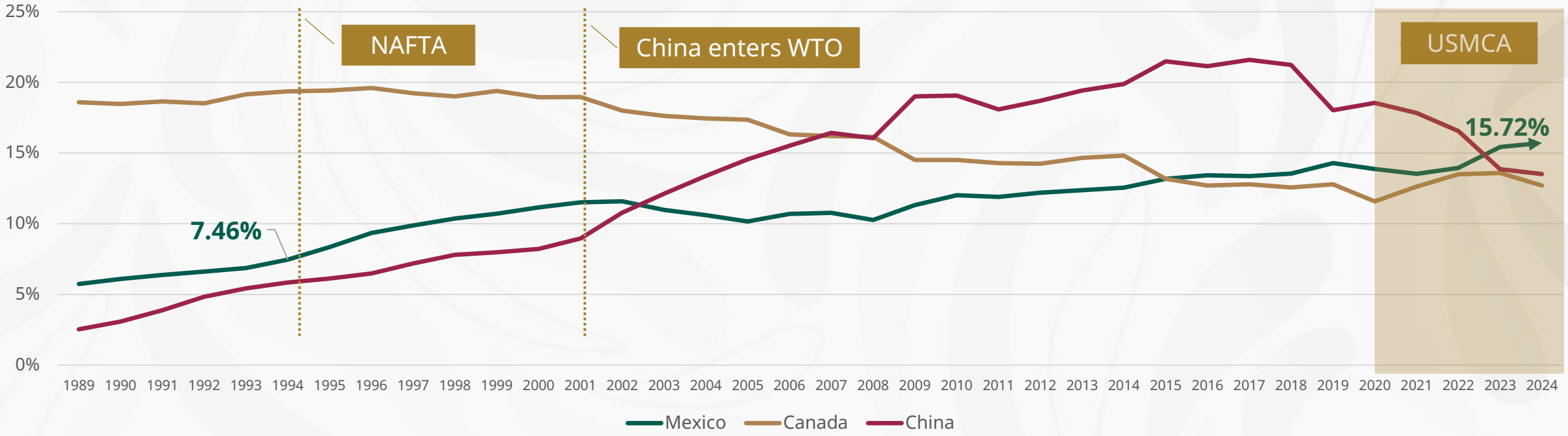


1/ Center for Strategic and International Studies, *"The USMCA Strategic Initiative,"* accessed January 6, 2025, https://www.csis.org/programs/americas-program/usmca-strategic-initiative.

Mexico is the Top U.S. Import Partner

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Figure 1. Market share of total US imports (top 3, %)





2025 Año de La Mujer Indígena

1/ U.S. Census Bureau, *"Foreign Trade: Data - Historical Series,"* accessed January 6, 2025, https://www.census.gov/foreign-trade/statistics/historical/index.html.

Mexico is the Top U.S. Import Partner

- **Mexico's** import share grew significantly from 7.46% ($49,493) in 1994 to 15.72% ($466,625) in 2024. This represents an 843% increase in the value of imports. Mexico overtook Canada in 2019 and became the top U.S. import source in 2023.

- Although the value of imports increased by 194% from 1994 to 2024, **Canada's** import share declined from 19.36% ($128,406) in 1994 to 12.71% ($377,239) in 2024, due to the growing prominence of Mexico and China.

- **China's** import share surged from 10.78% in 2002 (the year it entered the WTO) to a peak of 21.59% in 2017 (+100%). However, trade tensions and diversification efforts caused China's share to drop sharply to 13.86% in 2023.



2025 Año de La Mujer Indígena

1/ U.S. Census Bureau, *"Foreign Trade: Data - Historical Series,"* accessed January 6, 2025, https://www.census.gov/foreign-trade/statistics/historical/index.html.

IV. Plan México



Plan México:
A Roadmap to Industrial Transformation by 2030

Gobierno de México | Relaciones Exteriores Secretaría de Relaciones Exteriores | Economía Secretaría de Economía

KEY OBJECTIVES

- Develop a long-term strategy for regional development.
- Promote nearshoring to attract global supply chains.
- Boost national and regional production through import substitution.
- Relaunch the "Made in Mexico" program.
- Create high-quality jobs in manufacturing and services.
- Strengthen local supply chains with higher value-added contributions.
- Advance regional development through focused industrial and wellbeing hubs.

2030 GOALS

- Top 10 global economy.
- Over 25% investment-to-GDP ratio by 2025, 28% by 2030.
- 1.5 million jobs in strategic industries.
- 50% of public procurement sourced from Mexican industries, with increased domestic content across key sectors.
- Reduce approval timelines for investment processes from 2.6 years to 1 year by cutting 50% of bureaucratic steps.
- Promoting environmental sustainability through initiatives like water reuse and clean energy adoption.



2025 Año de La Mujer Indígena

Regional Growth Through New Industrial Hubs

Strategic Industries

- Automotive and electromobility
- Chemicals and petrochemicals
- Pharmaceuticals and medical devices
- Agribusiness
- Semiconductors
- Consumer goods
- Aerospace
- Energy
- Textiles and footwear



100 new **industrial parks**

¿Why these industries?

- Expansion of existing sector
- New productive activities
- Substitution of industrial imports



Public Investment Supporting Plan México

Sector	Commitment	Note
Energy	$23.4 B USD for electricity generation, transmission and distribution infrastructure.	Achieve 45% clean energy in the national grid.
Oil & Gas (Pemex)	$17.3 B USD of avg. annual investment.	Boost domestic oil and gas production and expand refining capacity.
Water	+ $1 B USD for hydrological projects by 2025.	Rehabilitate waterways and modernize irrigation systems for 200,000 hectares of farmland.
Infrastructure	+ 3,000 km of new railways for freight and passenger use.	Enhance connectivity and modernize transportation networks to support economic growth.
Public Housing	$25.65 B USD to construct 1 million homes.	Improve access to housing and address the growing demand for affordable living spaces.



2025 Año de La Mujer Indígena

Streamlined Investment Through Digital Tools: Single Window for Investors VUI MX[1]

Gobierno de México | Relaciones Exteriores Secretaría de Relaciones Exteriores | Economía Secretaría de Economía

Through VUI MX, Mexico follows international best practices to attract investment, boost competitiveness, and create a better business climate in our country.

VUI MX provides:

1. **Transparency and legal certainty** in rules and procedures
2. **Streamlined processing times** for investors
3. **Support** throughout the investment process

Step-by-step guide on general procedures by economic sector.

Provides key information about investing in Mexico.

Quick response and guidance for all investment setup procedures.



2025 Año de La Mujer Indígena

1/ VUI MX: https://ventanillaunica.economia.gob.mx/

V. Tax Incentives



A Quick Guide to Mexican Taxes

Gobierno de México | Relaciones Exteriores Secretaría de Relaciones Exteriores | Economía Secretaría de Economía

Tax Jurisdiction	Tax Name	Description	Tax Rate
Federal	Value-Added Tax (IVA)	Flat ax on the sale of goods and services	16%
	Income Tax (ISR) – Individuals	Progressive tax on personal income	1.92%-35%
	Income Tax (ISR) – Industries	Flat tax on corporate profits	30%
	Special Tax on Production and Services (IEPS)	Excise tax on specific goods like alcohol, tobacco, and fuel	Varies by product (8%-50%)
	General Import Tax (IGI)	Tax on imported goods	Varies by product
State	Payroll Tax (ISN)	Tax on salaries paid by employers	Varies by state (1%-3%)
Municipal	Property Tax	Tax on real estate owned by businesses	Varies by municipality
	Rights for Utility Fees	Fees for services like water and waste management	Varies by municipality



2025 Año de La Mujer Indígena

Key Programs Driving Manufacturing Competitiveness: PROSEC

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Aimed at companies manufacturing specific goods, allowing them to import raw materials, machinery, and components with preferential tariffs, regardless of whether the final product is for export or the domestic market.[1]

Who It's For: Manufacturers in key sectors such as automotive, electronics, and aerospace.

Why It Matters: Enables cost savings on production inputs, boosting profitability and encouraging investment in strategic sectors.

Key Benefits: **Reduced import duties on inputs and machinery.**



2025 Año de La Mujer Indígena

1/ PROSEC https://www.snice.gob.mx/cs/avi/snice/progfom.prosec.acercade.html

Key Programs Driving Manufacturing Competitiveness: IMMEX PROGRAM

Gobierno de México | Relaciones Exteriores Secretaría de Relaciones Exteriores | Economía Secretaría de Economía

Designed for companies that temporarily import goods to perform industrial or service processes, including manufacturing, transformation, repair, or export activities.[1]

Who It's For: Companies involved in export-focused manufacturing or services.

Why It Matters: Helps lower operating costs and improve competitiveness for businesses exporting from Mexico.

Key Benefits:

- **100% exemption from General Import Tax (IGI).**
- Reduced compensatory fees (if applicable).

IMMEX 4.0

Integration of VAT and Special Tax Certification with the Export Manufacturing Program 4.0, reducing new company startup time by 50%.



2025 Año de La Mujer Indígena

1/ IMMEX Program https://www.snice.gob.mx/cs/avi/snice/progfom.immex.acercade.html

Strategic Tax Incentives for Investment and Nearshoring

Free Zones: Strategic Border Incentives

Special tax and investment benefits for companies operating near Mexico's northern border with the U.S. and southern border with Guatemala and Belize.

Key Benefits:

- **50% reduction in Value Added Tax (IVA) (from 16% to 8%).**
- Tax credit equivalent to one-third of Income Tax (ISR) incurred during the year or in provisional payments.



2025 Año de La Mujer Indígena

Strategic Tax Incentives for Investment and Nearshoring

New Fiscal Incentives to Foster Investment

Plan México introduces fiscal incentives to foster investment, dual education, and innovation.

Key Benefits:

- **Immediate Deduction** (up to 91%) for Fixed Asset Investment.
- **Additional 25% Deduction** for increased spending on training or innovation.



2025 Año de La Mujer Indígena

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Mexico:
Where Opportunity Meets Profit

April 2025



2025 Año de La Mujer Indígena

Plan México

Strategy for Equitable and Sustainable Economic Development for Shared Prosperity

First draft

Mission

- Long-term development plan for the country.
- Promote reshoring.
- Increase national and regional content. Import substitution.
- Relaunch the ”Hecho en México” (“Made in Mexico”) program.
- Create well-paid jobs in manufacturing and service sectors.
- Increase higher-value local supply chains.
- Promote poles for development and wellbeing, based on regional strengths.
- Expand access to high school and higher education and improve its relation to the development plan.
- Strengthen scientific and technological development and innovation.
- Promote continental integration.

2030 Goals

1. **Become one of the top 10 economies** by strengthening the domestic market and international participation.
2. **Boost investment-to-GDP ratio**, with investment rates above 25% by 2026 and above 28% by 2030.
3. **1.5 million additional jobs** in specialized manufacturing and strategic sectors.
4. **50%** of national supply and demand in strategic sectors will be made in Mexico.
5. **Increase by 15% the national content** in global value chains in these sectors: automotive, aerospace, electronics, semiconductors, pharmaceutical, chemical, and others.
6. **50% of public procurement** will be sourced nationally. Public procurement will be a development tool.
7. **Vaccines made in Mexico**: we will promote the development of pharmaceutical manufacturing processes and local packaging with emphasis on advanced biotechnology.
8. **Reduce from 2.6 to 1 year the time needed to set up an investment**: 50% fewer procedures and requirements, with a digital single window for investors.
9. **150,000 professionals and technicians per year**, with ongoing training aligned with strategic sectors and 100% dual education in technical high schools.
10. **Environmental sustainability**: promote investments with ESG practices such as water reuse, investment in clean energy with backup, solid waste management systems, and community impact actions.
11. **30% of SMEs with access to financing**.
12. **Become one of the 5 most visited countries worldwide**.
13. **Reduce poverty and inequality**.

Actions

January-April 2025

1. **January 9**: First session of the Regional Economic Development and Reshoring Advisory Council (CADERR).
2. **January 13**: Presentation of Plan México.
3. **Beginning January 15**: Monthly progress reviews of the private investment portfolio and 100 industrial parks.
4. **January 6-15**: Start of work between companies, universities, and government on strategic projects, such as, Olinia, Data Center, Drones, launch of Mexican Satellite, generic medicines and biosimilars, etc.
5. **January 17**: Publish Reshoring Decree for accelerated depreciation of new investment in fixed assets for Mexican global companies, without sector discrimination, valid until 2030. Presentation of the National Digital Investment Window.
6. **January 17**: Presentation of the National Simplification and Digitalization Law initiative.
7. **January 20-24**: Start of working groups with importing companies to develop local and regional suppliers, with North American tariff harmonization.
8. **February 3-7**: Launch Development Banking fund for MSMEs, suppliers/exporters with anchor companies.
9. **February 3-7**: Rules for energy consumption and programs for private sector participation in energy generation.
10. **February 17-21**: Relaunch of the “Hecho en México” (“Made in Mexico”) brand.
11. **February 17-21**: Mixed investment programs for infrastructure projects. Launch tenders in 2025 for projects requiring at least 100 billion pesos in private investment.
12. **February 17-21**: Create collaboration network for technical, curricular, and continuing education in middle and high schools, Ministry of Science, Humanities, Technology and Innovation, Economy, Tecnológico Nacional, IPN, UNAM, and business sector.
13. **February 24-28**: Publish decree that includes at least 1 development pole per industrial corridor as in the case of CIIT.
14. **February 24-28**: Creation of IMMEX 4.0 program.
15. **April 18-19**: Sign agreement between Bank of Mexico, Mexican Banking Association, and Federal Government to increase access to financing for SMEs by 3.5% annually.

Industrial Development Strategies

Reshoring Decree

- Immediate deduction (ID) of new investments in incremental fixed assets, applying the highest percentages to investments in high-technology sectors, research and development.
    - No distinction between foreign and Mexican companies.
    - No discrimination by industry or sector.
- **Additional deduction of 25%** of incremental spending to train workers in collaboration with educational and research institutions.
- The Decree will end in October 2030.

Poles of Wellbeing Decree

Legal Frameworks
Requirements

- Government contribution of land with Environmental and Social Impact assessment.

Planning Instruments

- Master Plan.
- Development programs.

Legal certainty

- Tax incentives, special customs regime, single digital window.

IMMEX 4.0

Consolidate the current IVA and IEPS Certification process with the new Export Manufacturing 4.0 Program within the Ministry of Finance.

- **This reduces the startup time for a new company by 50%.**

Development Banking

- **Reverse factoring flow**, where the bank estimates the risk of the anchor company and not of the MSME.
- **An anchor company** sells between 100 and 500 million USD annually, depending on the sector.
- **MSME supplier registry** for anchor companies.
- Design of supply chains **with scale and specialization.**

Public Investment

Energy

- **22,000 MW increase in energy generation by 2030**.
- First portfolio of **100 expansion and modernization projects for the National Transmission Network**.
- Investments to reach **54% participation of the Mexican State**.
- Production of **1.8 million barrels of oil.**

Water

- **17 infrastructure projects** benefiting 31 million people.
- **20 million USD of public investment** in water projects for 2025.
- **Sanitation** of water bodies, particularly the **Lerma Santiago, Atoyac, and Tula rivers.**
- **National Agreement for the Human Right to Water and Sustainability**: +21 billion pesos of private investment.
- **National Technification Program: 200,000 hectares** of irrigation benefiting 225,000 producers.
- A decree will be issued to regularize concessions and enable residents to access subsidies, credits, and programs.

Transportation

- More than **3,000 kilometers of railway tracks** for passenger and cargo transport.
- Urban Mobility **Infrastructure**.

Professional and Technical Education

- Reduce the 31 high school subsystems to **only 2: general academic and technological/vocational**
- **Consolidation of upper secondary programs**:
    1. "The School Belongs to Us" Program
    2. Benito Juárez Universal Scholarship
    3. Expansion
- Two universities will become national**: Rosario Castellanos and Health**, which will serve **330,000** more students

Housing

- **1 million** social housing units built
- **1 million** housing units regularized
- **450,000** home improvements and expansions
- Freezing of balance and monthly payments for **2 million INFONAVIT loans**
- **148 architectural projects** between INFONAVIT and the Tecnológico Nacional de México

Regulatory Framework

Decrees

- **Reshoring** Decree
- **Development Poles** Decree
- Operation Rules for **Development Banking Programs**

Laws

- National Law of **Simplification and Digitalization**
- Secondary Laws for the **energy sector**
- **Updated** Mexican official norms (NOM)

Foreign Trade Policy

- **Trade** agreements
- **Tariff** policy
- Customs **intelligence**

Inter-Agency Coordination

- Economy - Ministry of Economy (SE)
- Science and Technology - Ministry of Science, Humanities, Technology and Innovation (SECIHTI)
- Environment - Ministry of Environment and Natural Resources (SEMARNAT)
- Tourism - Ministry of Tourism (SECTUR)
- Regional Economic Development and Reshoring Advisory Council (CADERR)
- Finance - Ministry of Finance and Public Credit (SHCP)
- Energy - Ministry of Energy (SENER)
- Health - Ministry of Health (SSA)
- Digital Transformation - Digital Transformation and Telecommunications Agency (ATDT)

Office of the President

Public Capabilities

- Good Governance - Ministry of Anti-corruption and Good Governance
- Communications - Ministry of Infrastructure, Communications and Transportation (SICT)
- Agriculture - Ministry of Agriculture and Rural Development (SADER)
- Defense - Ministry of National Defense (SEDENA)
- Education - Ministry of Public Education (SEP)
- Labor - Ministry of Labor and Social Welfare (STPS)
- Navy - Ministry of the Navy (SEMAR)
- Security - Ministry of Security and Citizen Protection (SSPC)
- Customs - National Customs Agency of Mexico (ANAM)

Why These Strategic Sectors and Products?

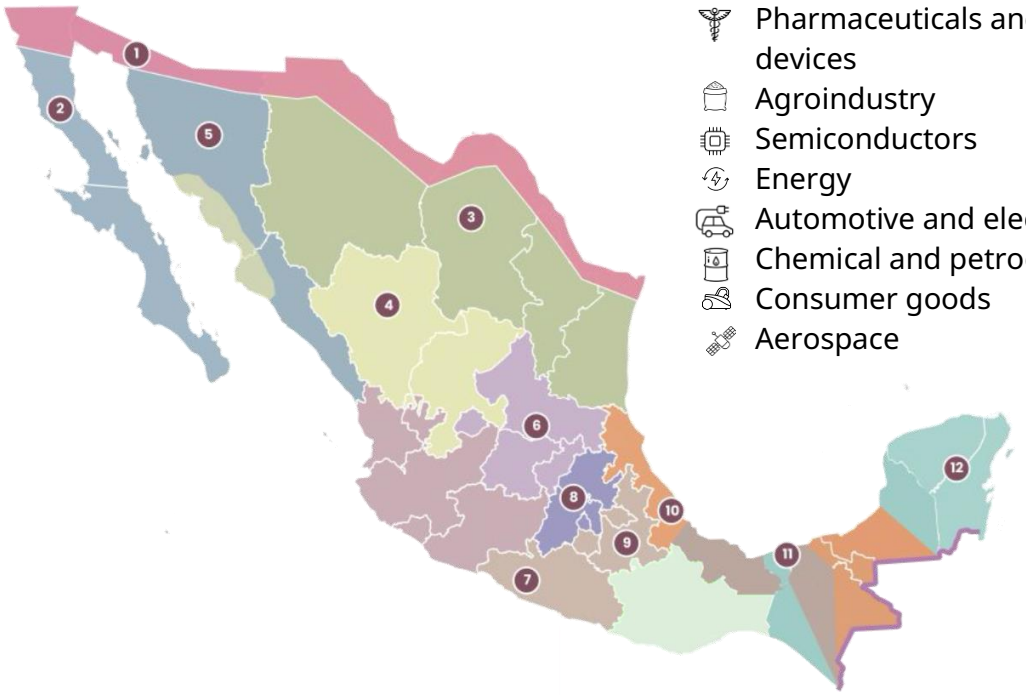
1. **Identification of Strategic Activities** – The activities must meet three key criteria:
    - Contribute to important goals:
        - Create better jobs: Activities that promote formal, well-paid jobs.
        - Combat climate change: Sectors that promote clean energy or reduce emissions.
        - Economic diversification: To reduce dependence on traditional or concentrated exports.
    - Supply-side viability: Mexico must have the technical capabilities, infrastructure, or natural resources necessary for production.
    - Demand-side viability: There must be an accessible market, either domestic or international.
2. **Classification of Strategic Activities** – The activities must also fall into one of these categories:
    - Expansion of existing sectors: Sectors where Mexico already produces but with potential to scale production and improve competitiveness.
    - New productive activities: Sectors where Mexico does not currently produce but can develop within a reasonable timeframe.
    - Industrial Import Substitution: Imported products or inputs fundamental to the country's industrial processes that could be manufactured locally.

The sectors mentioned are indicative only. There is a comprehensive plan for the rest of the sectors.

Poles of Wellbeing

Strategic Sectors

- Textiles and footwear
- Pharmaceuticals and medical devices
- Agroindustry
- Semiconductors
- Energy
- Automotive and electromobility
- Chemical and petrochemical
- Consumer goods
- Aerospace



Polygons

1. Border Region - 300 hectares, Nuevo Laredo
2. Gulf of California - 555 hectares, Hermosillo
3. North - AHMSA 740 hectares, Piedras Negras Binational Park 300 hectares
4. Durango - 470 hectares
5. Northwest - Plan Sonora
6. Bajio - 52 hectares, Celaya
7. Pacific - 608 hectares, Port Lazaro Cardenas
8. AIFA - 300 hectares, Tula
9. Center - 462 hectares, Puebla
10. Gulf - 935 hectares, dry port, Tamaulipas
11. Isthmus - 12 poles
12. Maya - 223 hectares, Merida and Progreso

100 New Industrial Parks

The polygons described here are indicative only; official designation will occur upon publication of the decree.

Sectors: Textiles and Footwear

2030 Goals

- **5% annual growth in sales**.
- 50% national content in finished products with local SME suppliers replacing imports from Asian countries.
- 30% increase in the use of recycled fibers.
- Substitution of 15% of sewing thread imports.
- Recover 49,000 jobs in the textile and footwear industry.

Key Projects

- **Job Recovery**
  - Description: Recover 20,000 jobs in the textile and footwear industry.
  - Location: Guanajuato, State of Mexico, Jalisco, Coahuila, Hidalgo, and Chihuahua.
- **20% increase in synthetic fiber production.**
- **Sales growth in the automotive and tourism sectors.**
  - Description: Alliance with automotive and tourism industries to grow sales at the industry level by 30%.

Regions

North, Bajío, Pacific, AIFA, Center.

Actions (2025 – 2027)

- **SE:**
  - Announce support for national industry with tariffs and elimination of temporary importation of finished products. End the pricing of finished goods below the raw material costs. Sign cross-sectoral agreement for the textile industry with other national industries. Maintain tariffs on 49 classifications of producers or finished products including garments and manufactured products.
- **Good Governance/Federal Public Administration:**
  - Public procurement from national suppliers and SMEs.
- **ANAM/Tax Administration Service (SAT):**
  - Increase customs collection, with smuggling controls.

Sectors: Pharmaceuticals and Medical Devices

2030 Goals

- **Attract 2 billion USD of annual investment in clinical research.**
- **15% increase** in the manufacturing of supplies, packaging, labels, pharmaceutical chemicals, blood derivatives, generic medications, machinery, connectable medical devices, glycosylated hemoglobin analyzer, hospital clothing, surgical instruments, prosthetics and osteosynthesis material, intraocular lenses for ophthalmology, inputs for peritoneal dialysis (dialysis bags), aseptic and antiseptic materials, and hospital furniture.
- Produce 90% of SRP-V, Rotavirus, influenza vaccines within **Mexico's National Vaccination Plan**.
- Achieve a **mixed investment project** to produce generics for diabetes and hypertension, for example: liraglutide, dapagliflozin, and valsartan.

Key Projects

- **mRNA Technology Vaccine Factory:**
  - Description: Private investment in the first mRNA technology vaccine production plant in Mexico for national consumption and export.
  - Location: AIFA Corridor.
- **Joint venture for diabetes generics**

Regions

Gulf of California, North, Pacific, AIFA.

Actions (2025 – 2030)

- **SSA/Federal Commission for Protection against Sanitary Risks (Cofepris):**
  - Campaign for authorization of extensions and low-risk modifications, medical devices, pesticides, and plant nutrients through presumed consent (afirmativa ficta).
  - Resolve presumed consent in the first instance.
  - Sign agreements with states to accelerate operation of the Federal Health System.
- **ATDT, Mexican Social Security Institute (IMSS)/Cofepris:**
  - Self-management of adhesion of new research centers after approval of the initial protocol.
  - 40-day response time reduction for clinical research authorizations.
- **SE/Development Banking:**
  - Present import substitution plan/develop local suppliers for the medical industry with factoring programs and preferential rates for R&D investment.
- **Cofepris:**
  - Join the WHO's List of National Regulatory Authorities of Confidence (WLA) by 2026.
- **ATDT/Cofepris:**
  - Simplification and Digitalization of procedures: Import permits, export support certificates.
- **IMSS/ SSA/ ATDT:**
  - Establish multi-annual consolidated purchase operation rules and distribution program with BIRMEX.
- **Ministry of Public Function (SFP)/ ATDT/Federal Public Administration:**
  - Public procurement from national producers and SMEs: gradual increase up to 60% by the sixth year.
- **SECIHTI/ SSA:**
  - Consolidate the production of active substances, generic medications, biocomparables, maquila manufacturing, patents, trademark registrations, technological licensing.

Sectors: Agroindustry

2030 Goals

- Make export permits **contingent** on compliance with labor and environmental laws.
- **Promote** the creation of packaging, labeling, and export packaging cooperatives.
- **Double** cold chain storage capacity for exports.
- **Increase** agricultural financing through development and commercial banks by 30 billion pesos for cultivation and processing of basic and exportable foods.

Key Projects

- **Designations of Origin:**
  - Description: Promote collective brands and designations of origin for: Ponche de Granada, Guayaberas Yucatán, Chicle de Talpa Jalisco, Barro Canelo Tonalá, Jalisco, Birote Salado Guadalajara, Equipales Zacoalco de Torres, Jalisco, Chile Chiltepin Sonora, Sal de Colima, Carne Seca de Sonora.
- **SAF Plan (sustainable aviation fuel)**
  - Description: Reduce SAF dependency by 20% to benefit sugar mills and cane producers while developing the local ethanol market.
- **Special Plan for Campeche and Tabasco**
  - Description: Increase rice, milk, and meat production with pasteurization plant in Campeche and drying plant in Michoacán.
  - Location: Tabasco, Michoacán and Campeche.

Regions

Gulf, Isthmus, Maya, Border, South Central, North, Bajío, Pacific, AIFA Center.

Actions (2025 – 2027)

- **STPS:**
  - Announce IMSS Express program for avocado export orchards.
- **SADER:**
  - Announce purchase agreement for Sinaloa corn and relaunch of the “Maíz por México” program.
- Design a marketing program for buyers and producers that includes protection against international price and exchange rate fluctuations.
- Design and implement a program to support regionally grown crops with access to national and international markets.
- **ATDT/COFEPRIS:**
  - Allow electronic signatures and payments for sanitary inspections of exports. Digitize export certification and advertising notices in DIGIPRIS. Reduce processing times for pesticide registrations and eliminate errors in biocide registrations and new technologies.
- **Development Banking:**
  - Announce expansion of credit portfolio and guarantee programs. Announce program with capital for packing, bottling, and export companies.
- **SEP/ SECIHTI:**
  - Special program for technological universities to specialize in the Plant Variety Law.
- **SADER/National Water Commission (Conagua):**
  - Technology upgrades for at least 200,000 hectares of irrigation systems.

Sectors: Semiconductors

2030 Goals

- **Double local supply in equipment manufacturing: OEM, ODM, and CMO.**
  - 10% reduction in dependency, develop local suppliers of sensors, actuators, smart controllers, and systems and components for electric vehicles, including batteries.
- **Double the value of exports:** Reshore 10 billion USD in ATP operations.

Key Projects

- **Reshore ATP company**
  - Description: Secure investment from producer of more than 30% ATP.
  - Location: Jalisco.
- **AI semiconductor plant**
  - Location: Jalisco.

Regions

Northwest: Northern Border, Pacific, Sonora.

Actions (2025 – 2030)

- **SE:** Announce creation of IMMEX 4.0 with special section for semiconductors.
- **Collaboration with U.S.:** Semiconductor Alliance Mexico, International Technology and Security Innovation Fund, USMEC-USAID, US technical delegation on semiconductors and human capital development.
- **SECIHTI, Technical Universities and Technological Centers offer programs** in engineering (chemical, mechatronics, robotics, telecommunications, systems, industrial). Cybersecurity, programming and informatics specialists. Technicians and specialists in advanced manufacturing, logistics and machinery.
- **SE:** Harmonize security standards and end devices with North America.
- **SENER:** Guarantee energy supply.
- **ATDT:** Digital infrastructure (internet, software, data centers).
- **SAT/ANAM/ATDT:** 24/7 customs operations.

Sectors: Automotive and Electromobility

2030 Goals

- **10% increase** in vehicle production for domestic consumption.
- **15% increase** in national content of vehicles through import substitution of electronic components, expansion of aluminum auto parts production, and development of battery cell production for electric vehicles.
- **Manufacture trains** and/or their components in Mexico.
- Double **dual education** plans.

Key Projects

- **OLINIA**
  - Description: Design and assemble a 100% Mexican small electric car accessible to the general public.
- **"Routes of Wellbeing"**
  - Description: 10 electromobility projects in public transportation systems.
  - Location: Nuevo León, Mexico City, Jalisco, Guanajuato, Michoacán, Tamaulipas, Aguascalientes, Guerrero, and Oaxaca.

Regions

Northern Border, Pacific, North, Northwest, Bajío, Center.

Actions (2025 – 2030)

- **States/SICT:**
  - 10 public transportation projects with electromobility.
- **SEP/Universities/States/STPS:**
  - Extend dual education programs in State of Mexico, Coahuila, Jalisco, Guanajuato, Querétaro and Aguascalientes.
- **Technical schools/National College of Technical Professional Education (CONALEP):**
  - Implement professional English policy.
- **SE:**
  - Authorizations under Rule 8, of automatic notifications for steel imports, prior import permits for fuels, compliance certification for NOM 119-SCFI-2000, and regulations for logistics yards at AIFA Airport. Transparency of INEGI data.
- **SE/Development Banking:**
  - Announce development program for local suppliers of micro-alloyed steel, polymers, fasteners, bearings, plastic injection components, wiring harnesses, steering casting, etc.
- **ATDT/SICT/SHCP/SE:**
  - Harmonize requirements and eliminate administrative burdens across all three levels of government.
  - REPUVE (Public Vehicle Registry) must be a reliable and secure source of information. The portal, which is currently outsourced, should be brought back under direct control.
- **SENER/Technical Agency:**
  - Issue permits for legally compliant applications and issue regulations for charging stations and chargers.
- **Federal Government with States:**
  - Consolidation of the 10 emblematic electromobility projects.

Sectors: Chemical and Petrochemical

2030 Goals

- **10% annual growth beginning in year three.**
- Reactivate production capacity of Morelos and Cangrejera petrochemical complexes for ethane derivatives, increasing from 250,000 to 520,000 tons.
- **Double private investment projects in the industry.**
- **Substitute 14 billion USD in imports** of strategic products such as advanced polymers, lightweight compounds (carbon fiber), material refining, metal-mechanics, packaging materials, and structural components.

Key Projects

- **Reactivation of the Cangrejera complex**
  - Description: Investment to modernize the plant under the Cangrejera petrochemical refinery concept.
  - Location: Veracruz.

Regions

Baja, North, Pacific, AIFA, Center.

Actions (2025 – 2027)

- **SE:** Tariffs on products whose imports have increased by more than 100% in the last two years.
- **Petróleos Mexicanos (PEMEX)/Private sector (IP):** IP-Pemex agreement on petrochemical strengthening.
- **SECIHTI/States:** Dual education. Signing of agreements with 25 leading companies in the Central and Gulf regions.
- **Federal Attorney for Environmental Protection (PROFEPA)/ATDT:** Eliminate pre-verifications for precursor chemicals, modernize VUC (Single Trade Window). Implement USMCA Annex 12.
- **ANAM:** Allow imports of soda ash and potash through alternative authorized locations, reduce intrusive customs inspections to under 10%. Eliminate customs shipment retention, modernize Veracruz and Coatzacoalcos customs facilities.
- **PEMEX:** Increase secondary petrochemical production.

Sectors: Consumer Goods

Food and beverages, personal hygiene and cleaning products, home appliances, toys, handicrafts, furniture and decoration, consumer electronics (cellphones, TVs, etc.)

2030 Goals

- **20% increase in national content (cross-sector supply).**
- 35% increase in digital payments in retail.
- 10% increase value-added content in exports.
- 25% increase in consumer goods production.
- 40% increase in public procurement of consumer goods with SME participation.
- 100% of appliances and consumer electronics with recycling or reconditioning plans.
- 20% reduction in single-use plastic packaging, substituting recyclable or compostable materials.

Key Projects

- **Cross-industry integration program**
  - Description: Construction, tourism, health, and tier 1-3 manufacturing industries.

Regions

Border, Northwest, North, Bajío, Pacific, Center, Gulf, Isthmus, Durango.

Actions (2025 – 2027)

- **SE/Development Banking:**
  - Announce a development program for local suppliers for polymers in general with Pemex, virgin plastic pellets, textile and sewing materials, metal parts for chemistry sets, coated and recyclable paper, cardboard boxes, decorated cardboard, silicone, pigments, solvents, adhesives, 6V batteries, electronic chips, electric motors, recycled glass, kiln construction materials, various resins including sugar cane-based resins, controlled chemicals and additives, displays and meshes, polyethylene bags and boxes, injected PVC accessories, standard and decorated plastic bags, and metal parts.
- **ATDT/SAT:**
  - Eliminate administrative burdens for tax payments for businesses with annual sales under 200,000 pesos.
- **SE:**
  - 5-year QUOTA policy to strengthen national and regional toy and furniture industry for finished products and progressively for inputs and components.
- **Good Governance:**
  - Public procurement for national suppliers and SMEs.

Sectors: Aerospace

2030 Goals

- **Rank in the top 10 countries by value of aerospace production.**
- 10% increase in local and regional content of industry exports.
- Design and build components for a national constellation of observation satellites.

Key Projects

- **Lead the first 100% Latin American space mission.**
- **Complete engine integration in Mexico.**
  - Description: Become one of three countries able to fully assemble an engine for Safran.
- **100% Mexican satellite in orbit.**

Regions

Northwest, North, AIFA, Center, Gulf, Maya.

Actions (2025 – 2028)

- Approve Outer Space Law
- Offset with at least 0.5 to 1 national integration ratio
- **SE/Development Banking:**
  - Announce development plan for local suppliers of steel, polymers, fasteners, bearings, plastic injection components, wiring harnesses, steering casting, etc.
- **SENER/Technical Agency:**
  - Streamline permit processes
- **SE:**
  - Authorizations under Rule 8, automatic notifications for steel imports, prior permits for fuel imports, compliance certification for NOM 119-SCFI-2000, regulations for logistics yards at AIFA
- **SECIHTI:**
  - 2027 space mission
- **ATDT:**
  - New Geostationary Satellite in 2028:
    - Replaces Bicentenario satellite (operational until 2031).
    - 100 times current capacity.
    - HTS (High Throughput Satellite) technology for greater efficiency and speed.
    - Coverage of national territory and exclusive economic zone (at least 300 Gbps).
    - Will address digital inclusion needs (internet access points).
    - Satellite backhaul (high-capacity services for mobile networks).
    - Promote knowledge transfer through incorporation of Mexican components.