

Welcome to Jalisco

**The Oasis for Investment in
Mexico**



01

Jalisco Premier Investment Destination



Mexico: Trade Without Borders

13 Free Trade Agreements with preferential access to 50 countries



- Economic Partnership Agreement
- México-EFTA Free Trade Agreement
- Cooperation and Bilateral Agreements



- United States-Mexico-Canada Agreement (USMCA)
- Mexico-United States Bilateral Affairs
- México-Canadá Bilateral Affairs
- Foreign Trade Information System (SICE)



- Pacific Alliance
- Latin American Integration Association (ALADI)
- Free Trade Agreement with Central America



- Trans-Pacific Partnership (TPP)
- Trade relations between Japan and Mexico



5 states with the greatest potential in Mexico

according to KPMG



The Center Western Region

One of Mexico's most dynamic economic corridors

The state is part of the **Centro-Occidente** (Center-Western) Macroregion, which has over **21 million inhabitants**.

This macro region includes **Jalisco**, Guanajuato, Querétaro, Aguascalientes, San Luis Potosí, Zacatecas, and Michoacán.

Together, the region accounts for:

- Over **25% of Mexico's GDP**.
- A major share of **manufacturing exports** (automotive, aerospace, electronics, and agri-food).
- **One out of every five pesos** that Mexico exports is produced in these seven states.

Jalisco alone has over **8 million inhabitants**, representing approximately **6.5% of Mexico's total population**.



Jalisco: A strategic investment hub in Mexico

4th

Contributor to Mexico's MDD (~7%)

Ranking	Entity	GDP 2024 (mdd)
1	Mexico City	\$215,886
2	State of Mexico	\$128,509
3	Nuevo León	\$114,444
4	Jalisco	\$103,559
5	Guanajuato	\$65,038

8th

Destination for Mexico's foreign investment
(3th quarter 2025)

Main DFI Recipients



Advanced Manufacturing (\$703)



Agroindustry (\$61)



Hospitality (\$109)



Financial Services (\$36)



IT & Professional services (\$18)

5th

Largest exporter in Mexico
(3th quarter 2025)

Leading Exports Sectors



Electronics



Transport and Equipment



Drinks and Tobacco



Plastic & Rubbers



Food Industry



IMCO results on regional competitiveness

INVESTMENT ATTRACTION

3rd place &
53.89 pts

Competitiveness:
medium-high

Best performance:
average age

TALENT ATTRACTION

4th place &
52.71 pts

Competitiveness:
medium-high

Best performance:
households with
access to piped water

INVESTMENT RETENTION

1st place &
53.89 pts

Competitiveness:
medium-low

Best performance:
fewer highway
robberies

TALENT RETENTION

4th place &
63.58 pts

Competitiveness:
medium-high

Best performance:
fewer people earning
below the welfare line

Bajío region = **3rd** place



States:

Aguascalientes

Colima

Guanajuato

Jalisco

Querétaro

Michoacán

Nayarit



Jalisco's Talent Advantage

120 Universities



Universities with STEM programs graduate more than 30,000 students annually

4.2M Economically active people



~60% under age 35, offering a young, adaptable, and tech-savvy workforce

Top 5 Mexican States

With the highest enrollment in higher education and post graduate studies annually

305,353

Higher education graduates annually

22,588

Post graduate studies annually

30,000

STEM annual graduates

- > Home to top-tier private and public education institutions
- > Competitive labor costs compared to the U.S. and Asia, with high quality standards
- > Strong ties between universities and companies
- > Active recruitment from neighboring states within the Centro-Occidente Macroregion.



Jalisco's Strategic Connectivity

2 Nearby Seaports



Express shipping to North America, South America, Asia and Oceania

2 International Airports



International Departures:

YYZ, YVR, YUL, YQB

LAX, JFK, ORL, LAS, PHX, ORD, DTW, ATL, DFW,

SAT

PTY



Railroad Connectivity



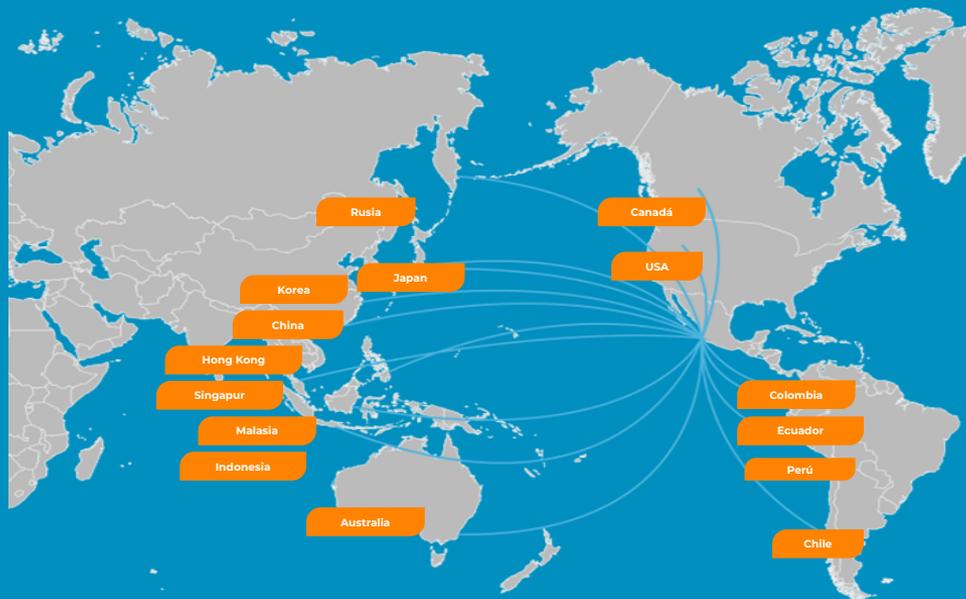
CPKC: Canadian Pacific & Kansas City
FerroSur
Ferrocarril Mexicano

Railroad Connectivity

CD. Juárez 1,874 km
Nuevo Laredo 1,291 km
Monterrey 1,416 km
Nogales 1,732 km
Lázaro Cárdenas 878 km
Manzanillo 355 km



Strategic Connectivity by Sea



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The Guadalajara Metropolitan Area is **just three hours away** from **Manzanillo**: Mexico's Largest Pacific Trade Port with Asia



#1 in container volume in Mexico



Handles **46%** of Mexico's **container cargo**



Primary Mexican port for imports from Asia, particularly China, Taiwan, Japan, and South Korea.



Regular routes with Kaohsiung, Yokohama, Shanghai, Busan and others.



Advanced deepwater berths for **high-volume shipments**



Ideal for nearshoring strategies, integrating Asian suppliers with North American manufacturing.

Source: ASIPONA. *Puerto de Manzanillo*

Strategic Connectivity by Air

Guadalajara International Airport

One of Mexico's busiest and most connected air hubs for cargo and passengers

- **#1 airport in Mexico for air cargo** (outside of Mexico City), handling over 190,000 tons annually.
- Hub for express and logistics companies (DHL, FedEx, UPS, Estafeta).
- Supports just-in-time deliveries for high-tech, automotive, and medical industries.
- Located within minutes of major industrial parks in the Guadalajara metro area.



Jalisco Exports, 3rd quarter of 2025

Annual
growth of **89%**

USD 13,839.7M
Q3 2025

VS

USD 7,320.3M
Q3 2024

“Jalisco is growing almost 10 times faster than the national average (9.2%)”

5th national
place

Surpassing border states
like Tamaulipas!

1st place among non-
border states
(for the 3rd consecutive
quarter)

“The cumulative total as of September 2025 (USD 32,546.4 M) exceeds all exports in 2024.”

Leader in electronics
manufacturing:

It represents **72%**
of total exports.

Annual growth of
174% in the
sector.



Industrial Parks

130 Industrial Parks

2 Technological Districts

3 Technological Parks



	IQ 2024	IQ 2025
Inventory (million m²)	6.41	7.09
Net absorption	103,255	123,111
Vacancy rate	1.8%	3.07%
Construction (m²)	428,225	692,104
Estimated investment (million USD)	299.76	484.47
To be built (m²)	546,059	1,643,425

Source: APIEJ





Access to Reliable Energy in Jalisco

Lower Cost



Lower cost of energy compared to other states in Mexico

High-Touch support



Site Selection: Directory of Industrial Parks Offering Guaranteed Power Supply

Infrastructure Financing



Partnerships with private companies to fund energy infrastructure, with costs amortized that are still lower than CFE (public) rates

Natural Gas Supply



Pipeline-delivered **natural gas available across all industrial zones**, sourced from Texas—the world's cheapest market

Jalisco is the first and ONLY state in Mexico with a dedicated Secretary of Energy

National leader in distributed generation (solar panels)

Geographical advantages for the development of renewable energy (Located in Mexico's high solar irradiance zone)

Strong presence of universities and R&D centers driving energy development

Express permits for power plants from 0.7 to 20 MW





Projects from Jalisco's energy portfolio

Electricity generation and demand in Jalisco

Electricity consumption (2024)

- Billed energy: **14.36 TWh**
- Losses: **10.8%**
- Total consumption: **15.91 TWh**

Electricity generation (2024)

- Total generation: **10.25 TWh**
- Conventional: **5.88 TWh**
- Clean energy: **4.37 TWh**



Key indicators

- Local generation coverage: **64.47% of state consumption**
- Clean energy share: **42.37% of the energy mix**
 - National average: **24.32%**





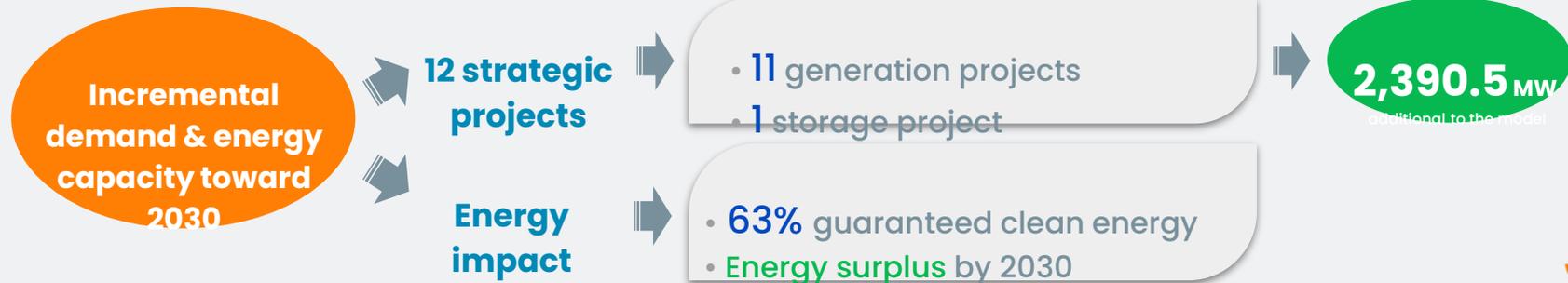
Strategic opportunities in clean energy generation

Distributed generation and self-consumption

- a) **Jalisco** is a national **leader in distributed generation**.
- b) Projected installation of more than **1,000 MW by 2030**.
- c) Need to strengthen **support mechanisms and incentives** for the adoption of photovoltaic systems.

Large-scale projects

- a) **High solar potential: 5.6 kWh/m²/day** (*among the highest worldwide*).
- b) Availability of **natural gas and wind power potential**.
- c) **+3,000 MW in new public and private projects** under development.



Project: **PURPLE LINE** *(unique at the national level)*

Objective:

Water reuse for Jalisco's **industrial and agricultural sectors** (currently 20 km), **expandable to additional regions** and aligned with **ESG compliance**.

Benefits:

- Potable water **savings**,
- **Reduced** overexploitation of aquifers,
- **Water sustainability**, and
- **Climate change mitigation**.

Main Achievements:

- **Benefited companies**
- **Public-private financing**
- **Investment returned** in reused water
- Interdepartmental coordination **with short-, medium-, and long-term impact**

El Salto
Purple
Line

- Installed capacity: 600 L/s (Feb 2026)
- Committed demand: 123.24 L/s
- Demand under review: 59.66 L/s
- Available capacity: 417.10 L/s

Current price

MXN \$17.70
per m³ + VAT



Public security investments

Escudo Jalisco

“More technology to protect the families of Jalisco.”

Cameras and technology to protect more than **6 million people**, with a **+50% increase in video surveillance**

- Highway monitoring arches: **249** cameras
- Monitoring points: **2,010** cameras and **745** license plate reading points

“Legado” Program

Support for more than **6,000 state police officers** and **their families**

- *University scholarships for their children, medical coverage, housing support, etc.*

“We have one of the best-paid police forces in the country.”



Employment Leaders in Mexico

By the end of 2025, Jalisco ranks **third nationwide** and **first in Mexico's Central-West region**.

New Jobs nationwide

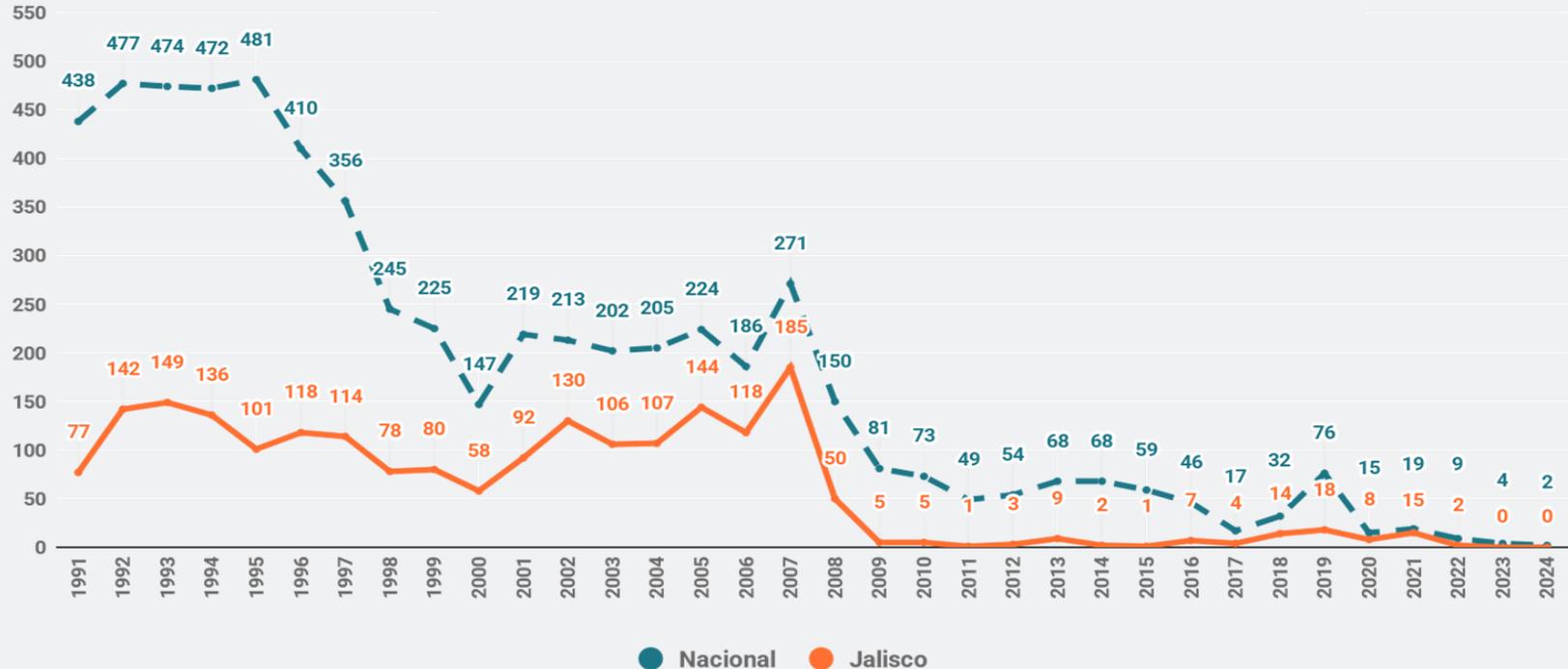


New Jobs Center-West region



A state with a stable labor landscape

Over a decade with with **minimum strike activity** in Jalisco.



Legal Certainty Offered by Jalisco



Unlike other states in Mexico, the selection of judges and magistrates in Jalisco will follow a **structured and merit-based process**. Candidates will undergo competitive examinations administered by prestigious universities.



A **standardized selection methodology** will be applied, with federal-level criteria differentiated where appropriate.



Companies established in Jalisco have the **certainty** that the first-instance judges handling their cases will be **experienced professionals**.



Jalisco will also include members of the **Administrative Justice Tribunal** in the process, while respecting their institutional autonomy.

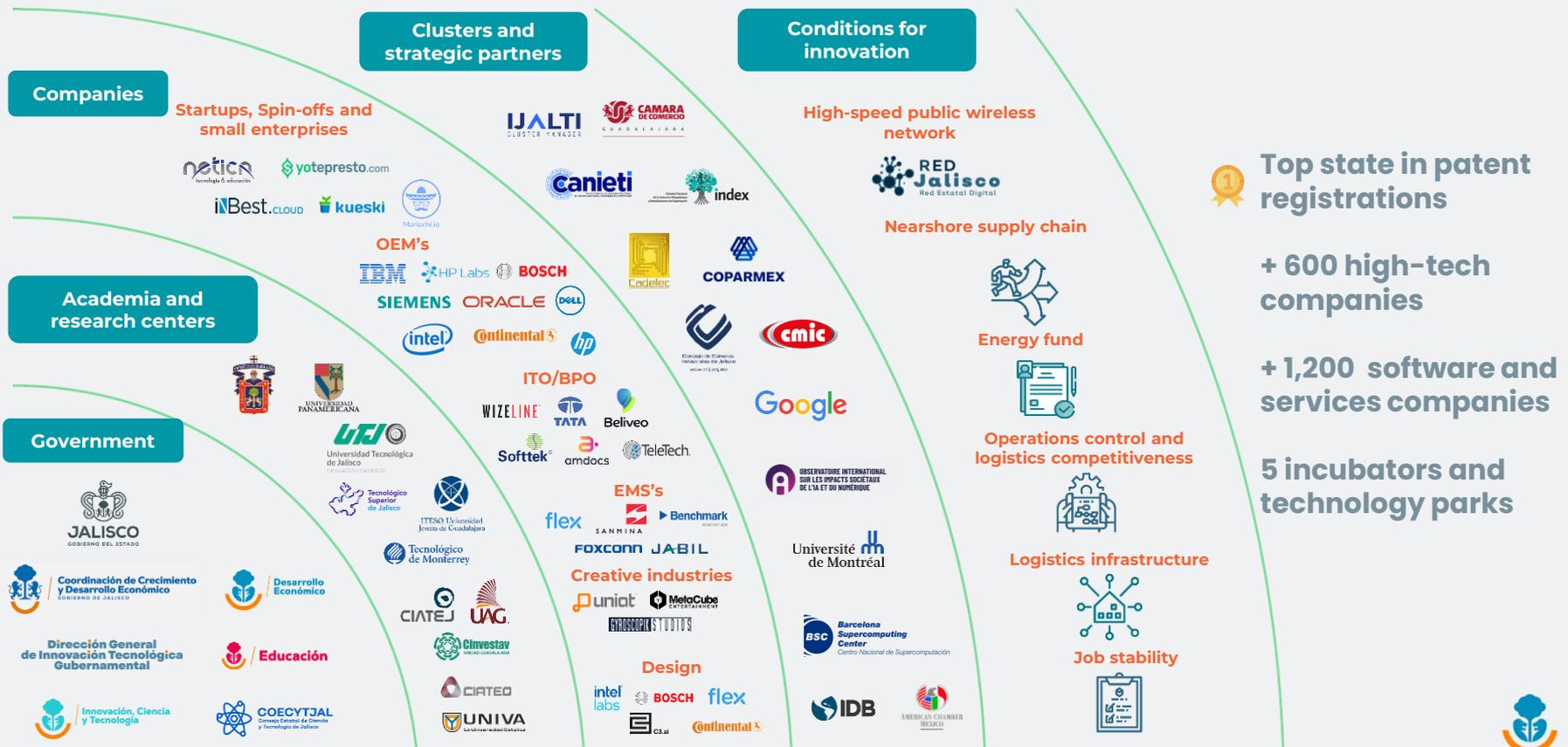


Requirements:

- **10 years** of professional experience for magistrate candidates and **5 years** for judges.
- **Gender parity** (50-50) will be ensured across all appointments.
- Random selection ("lottery") will be eliminated, **prioritizing merit and capability**.
- A single, rigorous evaluation process will include **legal, psychometric, and psychological testing**.



Innovation ecosystem



Innovation ecosystem

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1st
place **in patent
applications**

&

2nd
place **in invention
applications**

Approximately **18%** of the national total
concentrated in Jalisco



Jalisco, host to international events

Guadalajara International Book Fair (FIL):

The largest book fair in the Americas, it gathers authors, publishers, and readers for discussions, signings, and cultural activities.

Tourist attraction: the **3rd** largest contributor to **national tourism GDP**, behind Quintana Roo and Mexico City.



2026 FIFA World Cup (Mexico–United States–Canada)

Guadalajara, the most culturally representative Mexican host city.

- Hosting four group-stage matches

  
REPÚBLICA DE COREA DEN/MKDCZ E/IRL

11 DE JUNIO 20:00 HRS MT

  
MÉXICO REPÚBLICA DE COREA

18 DE JUNIO 19:00 HRS MT

  
COLOMBIA COD/JAM NCL

23 DE JUNIO 20:00 HRS MT

  
URUGUAY ESPAÑA

26 DE JUNIO 18:00 HRS MT

HORA CENTRAL DE MÉXICO



02

Jalisco: Oasis for Investments in Mexico Key Public Policies under Governor Mr. Pablo Lemus



Strategic Economic Sectors 2024-2030



Software Sector

 **1,000 companies in the state**
+140,000 jobs

Potential: "The Mexican Silicon Valley": affordable scalability, talent density, and strategic access to North American markets

Focus: AI, software defined vehicles (SDVs), Quantum Computing



Semiconductors & Advanced Manufacturing

 **600 companies in the state**
+ 600,000 jobs

Potential: strong industrial base, skilled workforce, and proactive investment in education and infrastructure

Focus: The state is launching a public-private Advanced Semiconductor Park with global reach



Automotive Sector

 **150 companies in the state**
+30,000 jobs

Potential: The state prioritizes automotive & electromobility, boosting local production and regional value chains

Focus: Compliance with USMCA rules of origin



Health Sector

 **160 companies in the state**
+25,000 jobs

Potential: Jalisco's strong pharma sector, cost effective care, connectivity to big markets and a well developed hospitality industry

Focus: Consolidate as a destination for medical tourism



Agroindustrial Sector

 **12,000 companies in the state**
+170,000 jobs

Potential: Jalisco's agro-industry benefits from export demand

Focus: Diversify markets and USMCA revision



Logistics Sector

 **130+ Industrial Parks in the state**
+600,000 sq meters under construction

Potential: Jalisco offers strong potential with a diverse industrial base spanning electronics, automotive, food processing, and logistics

Focus: Expedite permits and licenses in coordination with municipalities

A Leader in Semiconductors in Mexico

Jalisco is home to Mexico's "Silicon Valley"

Strategic Advantages

Leads in IC and PCB design, hosting Intel, SK Hynix, and other 20+ design centers

Approx. \$890M in global tech investments (Intel, Bosch, Flex, etc.)

National Leader in Competitiveness

Jalisco ranks 4th out of 31 states in the 2025 State Competitiveness Index

It performs best in the following areas:

- 1st in patent registration
- 2nd economic diversification
- 4th in cargo volume



More than 60 years of Ecosystem Consolidation

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1962-1990

Manufacturing of electromechanic typewriters

The first R&D activities begin

1991-1998

Arrival of contract manufacturers OEM's

2001

Industry shift to low volume high added value.

Jalisco established the Council for Science and Technology along with a trust fund to promote innovation, patents and talent developemnt

2010-2020

Creation of the Secretariat of Science, Technology and Innovation

(First one in Mexico)

2022

Launch of Jalisco's Industrial Policy: Jalisco Tech Hub Act

Talent developemnt collaboration with Arizona State University (aligned with the US CHips & Science Act)

2023-2024

Foxconn to build the world's largest superchip manufacturing plant in Jalisco

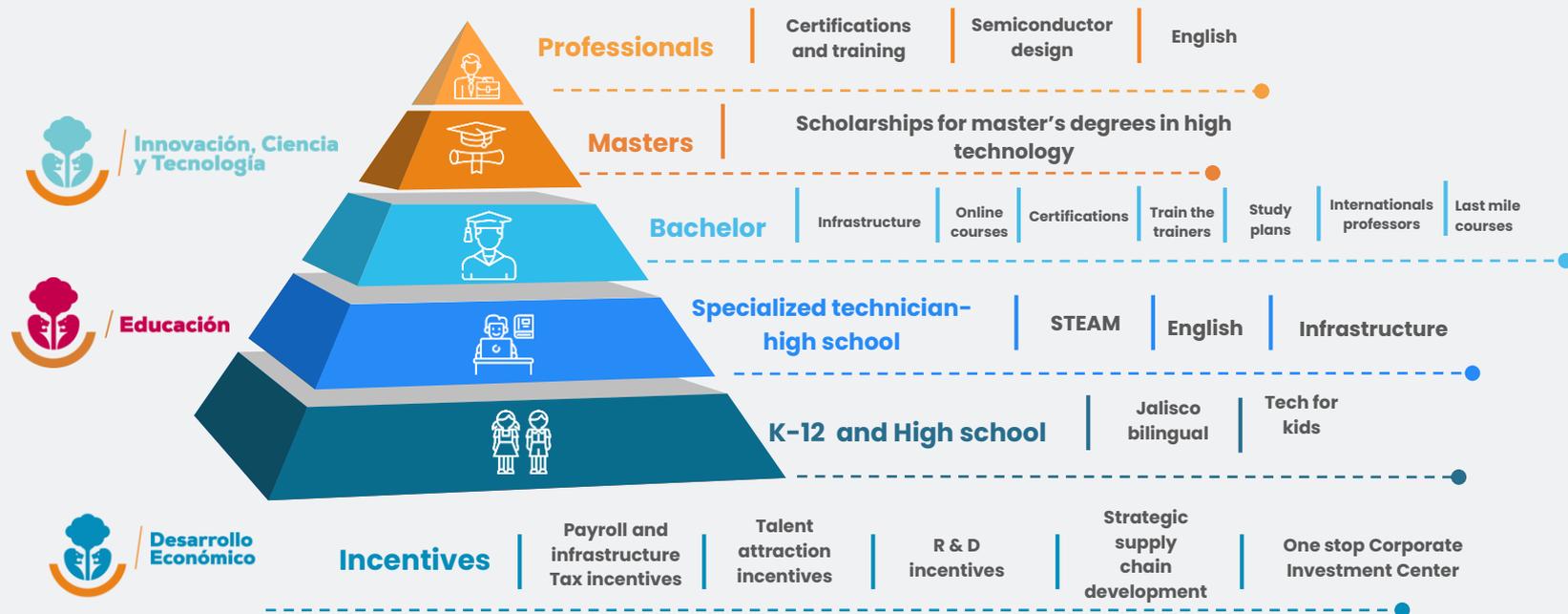
ASE Group and Micron announce major semiconductor investments in Jalisco





Jalisco Tech Hub Act for Talent Development

Jalisco is home to Mexico's "Silicon Valley"



Highly Specialized Talent development

Micro credential programs focused on IC and semiconductor design

Semiconductor company incubator

Local companies focused on semiconductor design

Shared Infrastructure

Equipped labs, classrooms, office space, etc.
Softlanding path

Home to the Semiconductor Design Center from Federal Government (Kutsari)

Talent Development



A one of its kind center in Mexico and Latin America: Federal and State of Jalisco Government, Private Sector and Academia collaborating to **nurture a long term pipeline of highly specialized talent for the global semiconductor Industry**

03

Incentives and Softlanding Welcome to Jalisco!



INVEST IN JALISCO

- One stop shop solution
- **High-touch support** to guide your company through every step
- **Support for all administrative procedures and permits at all levels**
 - City
 - State
 - Federal government
- **Aftercare services**





Strengthening Jalisco in the North American Supply Chain

**Incentives for CAPEX for
investing companies**



Identification of supply requirements
for exportable products

**Incentives for suppliers
of investing companies**



Identification of supplier
requirements **that support strategic
sectors**

Supplier Development Program



Financing



Linkages / value chain integration



Investor Incentives Offered by Jalisco





GOBIERNO
AL ESTILO
Jalisco

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Secretariat of Economic Development
Government of Jalisco