

Jalisco

American Industries

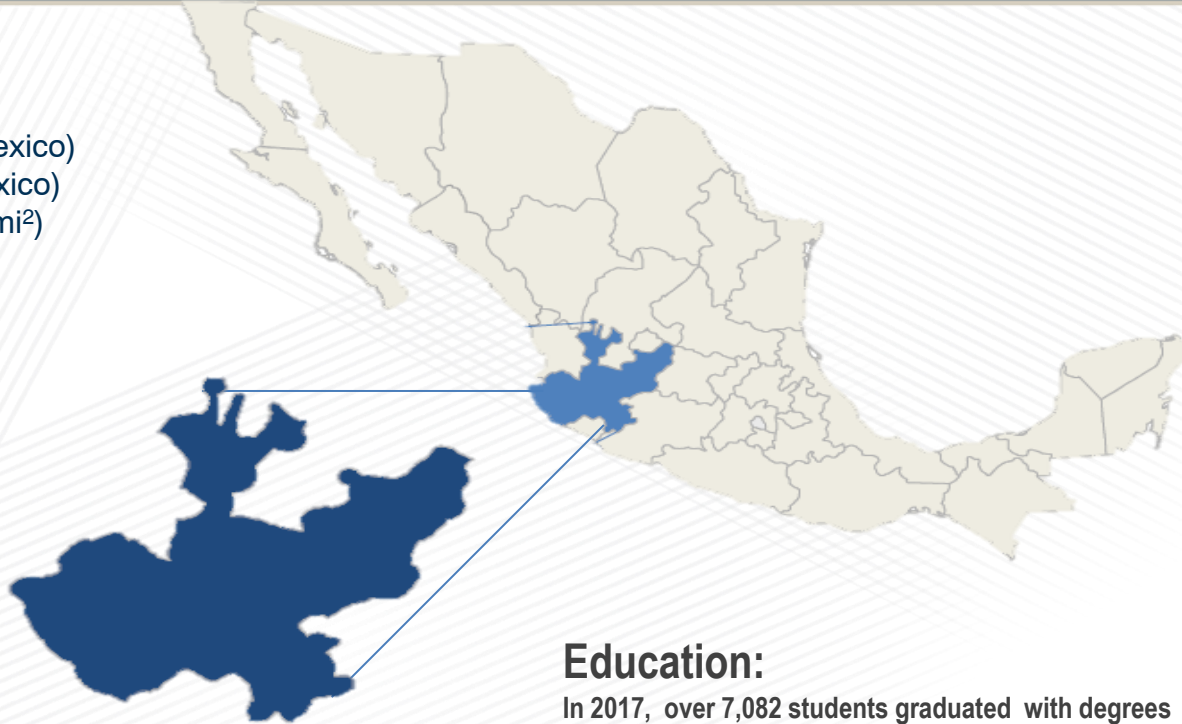
Site Selection – Regional Overview

Guadalajara, Jalisco, México



Jalisco at a glance

- **Surface:** 78,588 km² (30,343 mi²) (4% of Mexico)
- **Population:** 8.06M Inhabitants (6.5% of Mexico)
- **Population density:** 100 per km² (260 per mi²)
- **Municipalities:** 125
- **Main cities:**
 - Guadalajara (Metro)
 - Puerto Vallarta
 - Lagos de Moreno
- **Nearest ports of entry:**
 - Manzanillo, Col.
 - Lazaro Cardenas, Mich.



Population:
8.06 Million Inhabitants

By gender

Women	Men
51%	49%

By Working age group

15 & over	<15
66%	34%

By age range

0 - 14	15 - 64	65+
27.4%	65.4%	7.2%

Education:

In 2017, over 7,082 students graduated with degrees in Engineering

This represents 6% of the nation's total graduates in the same field of study.

Source: PROMEXICO

Jalisco at a glance

Jalisco is 2nd in new attraction of FDI nationwide, contributing 7.6% of the Mexico's new FDI.

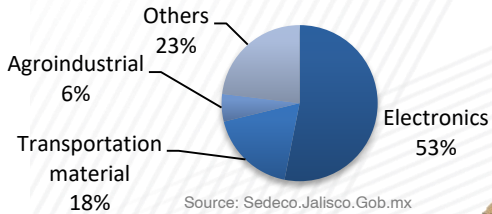
★ 8th Place Nationwide
Trade
\$98 Billion USD/Year



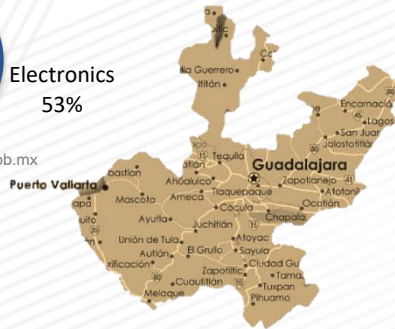
■ Exports ■ Imports

Source: Instituto de Información Estadística y Geográfica 2016

Jalisco International Commerce Main Industries 2016



Source: Sedeco, Jalisco, Gob.mx



Source: Inadem.gob.mx

Key Sectors

- Electronics
- Agroindustrial
- Construction products and services
- Tourism Services
- Chemical Products

Growing Sectors

- Logistic Services
- Medical Services
- Information Technology
- Renewable energy sources
- Research and development
- Wood furniture industry
- Textile industry

★ 8th Place Nationwide
IMMEX Establishments
+280

★ 8th Place Nationwide
IMMEX Employment
+130,000

Source: Mexico-now.com

IMMEX is defined as an instrument to temporarily import goods and services that will be manufactured, transformed or repaired, and then re-exported without payment of taxes, compensatory quotas, and other specific benefits

- Minimum export +500 KUSD
- Minimum 10% income from exports

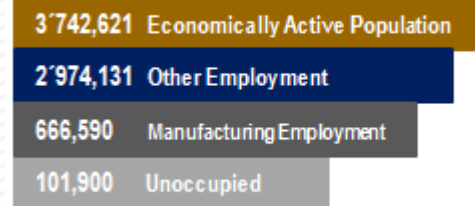


Guadalajara Metro area can offer competitive labor costs, the availability of qualified labor and the lowest turnover rate in Mexico's 3 largest cities (2013: 2.1%) and the border area with the United States.

Guadalajara Metropolitan Area

- **Surface:** 2,734 km² (920 mi²)
- **Population:** 4,434,878 Inhabitants
- **Elevation:** 1,870 m. (6,131 ft.)
- **Avg. Temp.:** 11°C – 26°C
- **Dis. to Laredo, TX:** 1010 km (626 mi.)
- **FTL Cost:** \$1001.16 USD
- **IMMEX Companies:** +138 (GDL/Zapopan)
- **IMMEX Employment:** +53,300 (GDL/Zapopan)

Jalisco Labor Statistics



Source: STPS-INEGI. Encuesta Nacional de Ocupación y Empleo.

Source: Sedeco.Jalisco.Gob.mx

Guadalajara Metro Area

Wages

		Total Cost (USD/Hr)	
Unskilled Labor	Minimum Operator C		\$2.72
	Maximum Operator AA		\$3.90
<i>Operator C - AA</i>			
Skilled Labor	Minimum Qualified Operator		\$4.31
	Maximum CnC Operator		\$4.66
<i>Qualified Operator – CnC Operator</i>			

Source: AI cost model

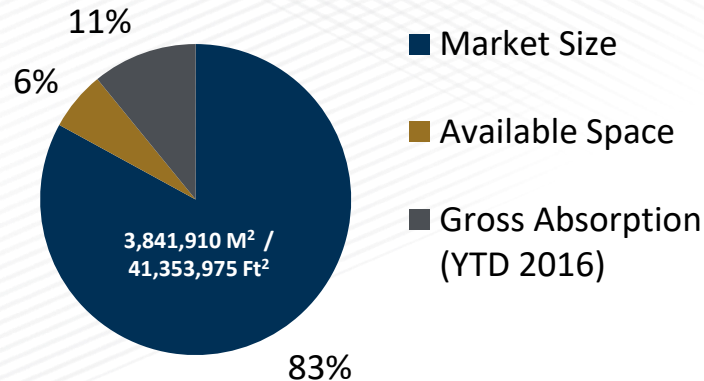
Real Estate (Q4 2016)

	USD/M ² /Month	USD/Ft ² /Month
Avg. Lease Rate	\$4.09	\$0.38

Source: JLL 2017 Research Report

“The Guadalajara Metropolitan Area is considered the city with the highest investment attraction potential in Mexico.”

- PROMEXICO



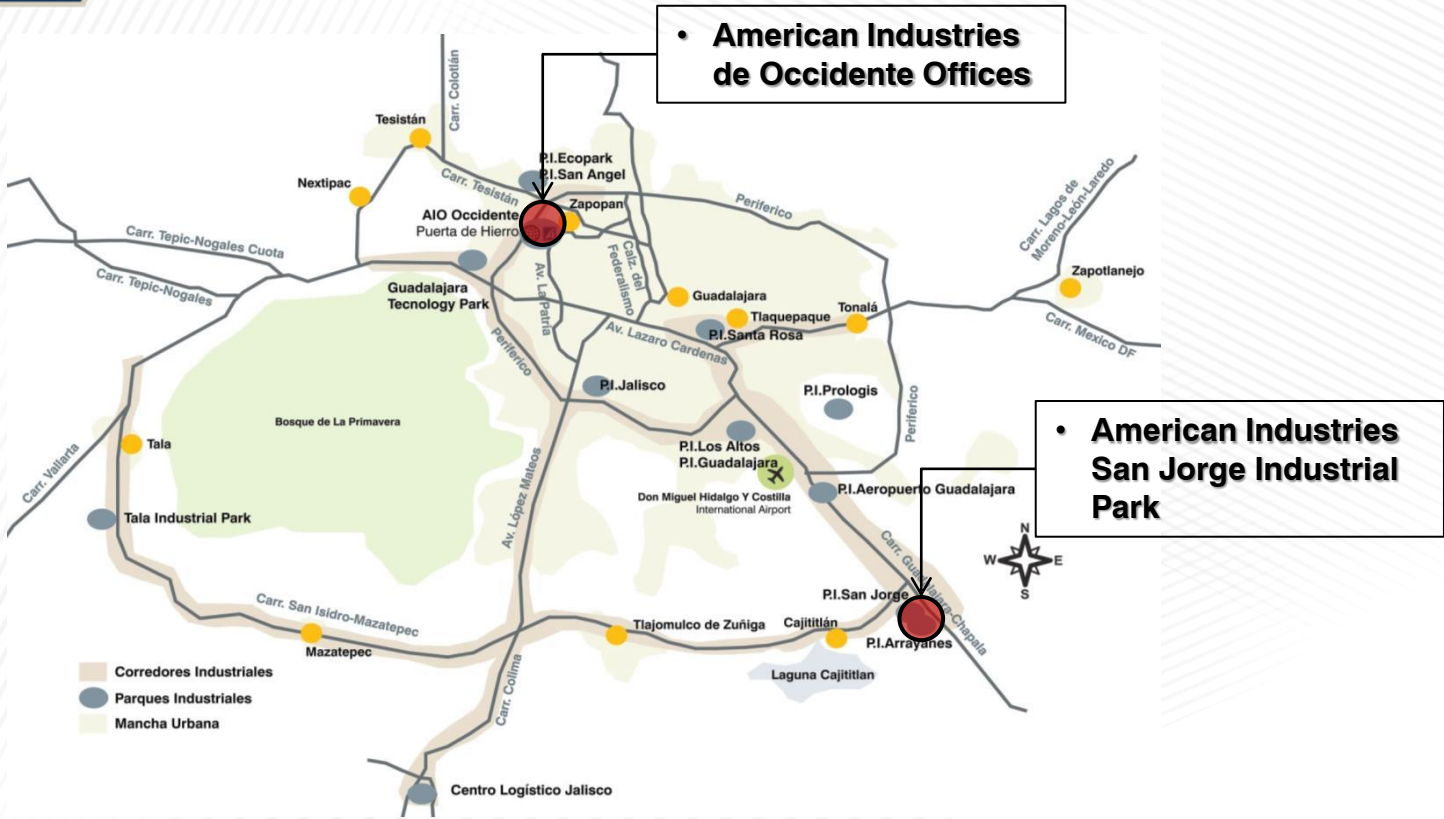
Jalisco at a glance

Guadalajara, known as the “Mexican Silicon Valley”, is home to about 40% of Mexico’s technology industry.

- +50 Industrial Parks
- 3 Technological Parks
- 1 Software Park
- 1 multimedia Park
- 1 Automotive Industrial Park



Site Selection – Guadalajara, Jal.



Site Selection – Regional Overview

Lagos de Moreno, Jalisco, México



Site Selection – Lagos de Moreno

Lagos de Moreno, Jalisco

- **Surface:** 2,797 km² (1079 mi²)
- **Population:** 153, 817 Inhabitants.
- **Nearest ports of entry:**
 - Manzanillo, Col.
 - Lazaro Cardenas, Mich.
- **Elevation:** 1,877 m. (6,158 ft.)
- **Avg. Temp.:** 16°C
- **Dis. to Laredo, TX:** 876 km (544mi.)



City	Distance
Monterrey, Nuevo León	812 km
Mexico City (DF)	564 km
Guadalajara, Jalisco	102 km

Lagos de Moreno is located within the industrial triangle of the 3 largest cities in Mexico: Mexico DF, Guadalajara and Monterrey. Within a radius of 400 km is 80% of the Mexican market, 70% of the industrial establishment, 70% of international trade, 70% of exports and 60% of the total population of the country.

Source: Lagos.gob.mx



Lagos de Moreno

- **Economically Active population:** 60,662
- **Occupied Population:** 57,022
- **% Occupied EAP:** 94%

Based on 2010 Census results

Permanent and Temporary Urban Workers	
Processing Industry (April 2012)	
Branch	No of workers
Food processing	4,382
Construction, reconstruction and assembly of transportation equipment and parts	1,504
Manufacture of metal products (except machinery and equipment)	1,041
Manufacture, assembly, and refurbishment of machinery and various parts (except electronics)	681
Footwear fabrication and leather processing	679

Key Economic Sectors

- Automotive
- Agroindustrial
- Food processing
- Footwear manufacture
- Leather goods
- Commerce

The geographical position of Lagos de Moreno has led world-class companies to seek business opportunities in the country's central industrial area (Bajío region).

Source: PROMEXICO



Polymer-Technik
Elbe GmbH



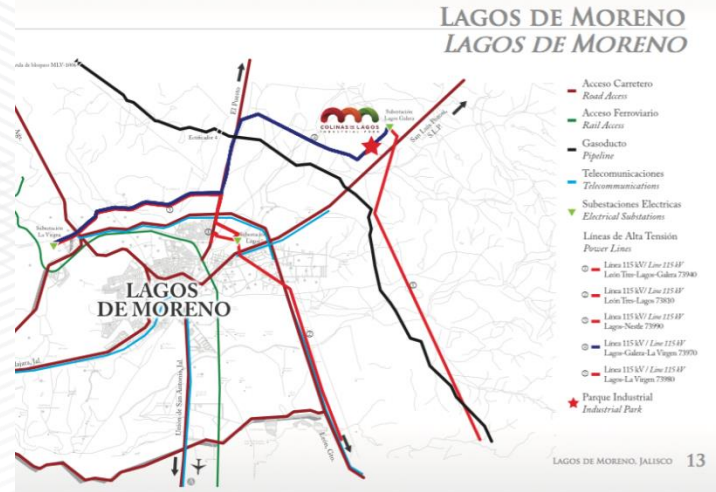
The potential of Lagos de Moreno to be a strong competitor in the Bajío corridor is also underpinned by an infrastructure of services and urban and industrial facilities that is backed by the federal and state governments.

Source: PROMEXICO

Colinas de los Lagos Industrial Park

Companies confirmed to be Installed (As of December 2016)

No.	Empresa	Giro	Empleos	HAS.	ESTATUS	WEB
1	Bader Jalisco	Instalación de la Planta de Ventiduros para Interiores Automotrices	772	5.3	EN OPERACIÓN	badersenlathier.de/
2	Advics Manufacturing México	Manufactura y ensamblaje de frenos para automóviles	53	10	EN OPERACIÓN	advicsusa.com.mx www.advics.com.mx
3	Stanley Electric Manufacturing México	Fabricación de partes automotrices lumínicas	146	10	EN OPERACIÓN	stanleyusa.com/mexico/
4	Matsumo Industries México	Manufactura de piezas de automóviles	70	6.4	INICIA OPERACIONES EN EL SEGUNDO SEMESTRE DE 2017	ncc-matsumo.co.jp/
5	Miyazaki Seiko de México	Elaboración de rolos de alambre de acero de alta calidad y Borrás entrelazados en frío, Autopartes	17	7.4	INICIA OPERACIONES EN EL SEGUNDO SEMESTRE DE 2017	mryazaki.seiko.co.jp/en/
6	Nissinkoku Mexicana	Fabricación e ingeniería de moldes plásticos para el sector automotriz	20	3.2	INICIA OPERACIONES EN EL SEGUNDO SEMESTRE DE 2017	nissinkoku.co.jp/
7	PIE Compounding de México	Industrial Fabricación de Caucho y Hule	40	6.1	TERMINADA	polymer-technik.com/ piex-ehs.fr/les
8	Vanwerk Automotive de México	Fabricación partes automotrices	31	6.2	TERMINADA	corporate.vanwerk.com/
9	Wako Tech de México	Fabricación de partes aluminadas de sonda para el sector automotriz	350	3.27	EN CONSTRUCCIÓN	wacogroup.com/06uacalinea03454031mrvf&l=1
10	Yasunaga México	Fabricación de piezas de motor para maquinaria automotriz	38	3	EN CONSTRUCCIÓN	lineyasunaga.co.jp
11	Pioneer Corporación	Productos de Electrónica para Autos, Casa y Mercados comerciales (Baterías de navegación, Estéreo, Destinos)	400	4.3	EN CONSTRUCCIÓN	pioneer.jp
12	Nippon Pillar Packing Co	Fabricación de productos de sellados, sellos mecanicos (Empaques)	80	4	OPERANDO EN RENTA Y POR INICIAR OBRA	pillar.co.jp
13	Neuman Aluminium - Raufass Technology	Brazo de control para la suspensión de automóviles	147	5	EN CONSTRUCCIÓN	aurofasserneuman.com
14	UMC Electronics Co., Ltd.	Componentes electrónicos para la industria automotriz	1000	4.78	EN CONSTRUCCIÓN	umc.co.jp
15	Huang • Yu	Estampado y piezas de moldeado para la industria automotriz	70	2	POR INICIAR OBRA	huangyu.com
16	Winkelmann Group GmbH-Co.Kg	Amariguadores, poleas, calefacción y componentes de transmisión, sistemas de distribución de combustible	22	3	EN CONSTRUCCIÓN	winkelmanngroup.de
17	Hajime Precision Plastic Product de México	Productos de plástico moldeado por inyección de precisión con el uso de la resina de plástico de ingeniería	33	1	EN OPERACIÓN	http://www.hajimeindustry.jp/
18	Xin Paint	Manufacturas de piezas de plástico para automóviles con pintura y recubrimiento cromado	500	4	POR INICIAR OBRA	http://www.xinpaint.co.in/
19	Ishoku Planner	Manufactura de sistemas de audio para sector automotriz (Bocinas)	298	3	POR INICIAR OBRA	
TOTALES:			4,087	92		



Benefits of "Colinas de los Lagos"

- ✓ It incorporates Lagos de Moreno in the dynamic automotive corridor of El Bajío and will promote an economic boost to the region.
- ✓ It has a privileged geographic location, Nissan, BMW, and VW assembly plants are located within 200 km.
- ✓ It has de capacity to accommodate between 45 and 70 industrial companies.
- ✓ It will create new job opportunities for the region.

Mexico's Automotive Corridor

Distance from LAGOS DE MORENO to the main cities in the Bajío region:

- Guadalajara (102 km) – 2 hrs
- Queretaro (213 km) – 2 hrs 30 min.
- Leon (36 km) – 50 min.
- Silao (42 km) – 1 hr 10 min.
- Aguascalientes (44 km) – 1 hr 20 min.
- San Luis Potosi (150 km) – 1 hr 44min

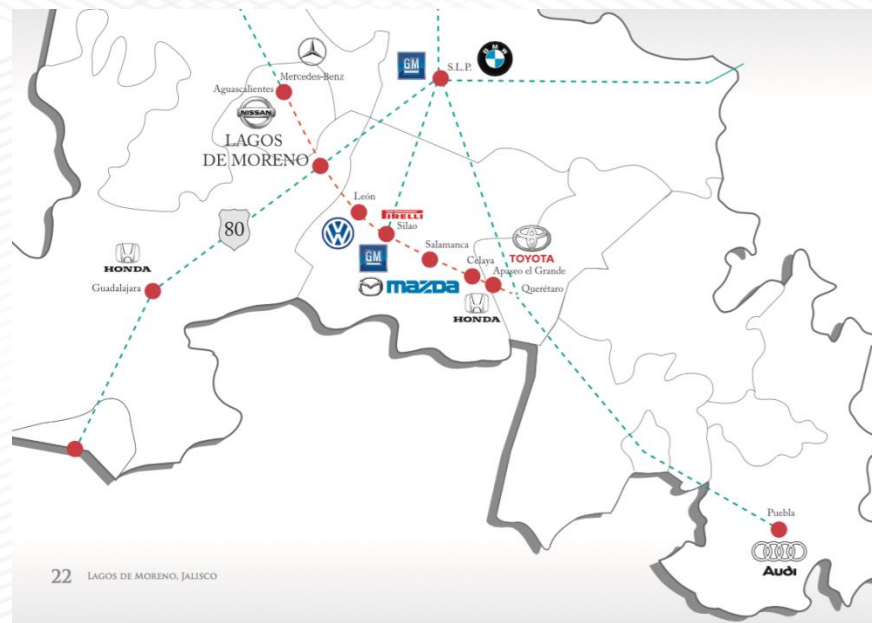
It is an important center of productivity for Mexico with large industries such as electrical, automotive and truck, aerospace, wireless telecom and trade in raw materials, groceries and metal products

Source: Bipcemex

This industrial corridor has international corporates like Honda, Mazda, General Motors, Nissan, Ford, Volkswagen, Toyota, Keihin and generally, various companies from countries like United States, Canada, Italy, France, Germany, Taiwan and Spain, among others.

Competitive Advantages

- ★ The natural and agricultural resources.
- ★ The achieved economies of scale and competitive costs.
- ★ The accumulated experience.
- ★ Indices of high specialization.
- ★ Strategic location.
- ★ Diversity in transportation (roads, railways, aircraft, or via telecommunications).
- ★ It has enough infrastructures to reach the distance of 8 hours at the border of US, 5 hours at the ports of Manzanillo and Lazaro Cardenas and about 4 hours to Mexico City.





American Industries

Site Selection - Shelter Administrative Services - Industrial Real Estate

Thank you!

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