



**American Industries®**

Site Selection - Shelter Administrative Services - Industrial Real Estate

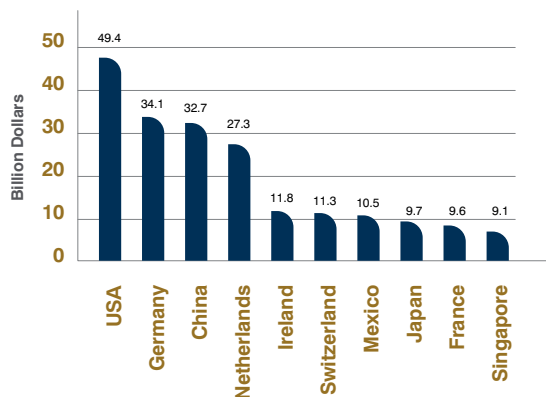
## Medical Devices Industry

*The Global Devices Market is constantly expanding, and Mexico is one of the top manufacturing centers in the world.  
The country offers agility in logistics and supply chain advantages.*

### Global Exports

The total value of global exports for medical devices reached US 205.5 billion in 2020. Mexico ranks seventh among the main exporting countries in the world.

**Medical Devices  
Global Exports 2020**  
*Top Exporters*

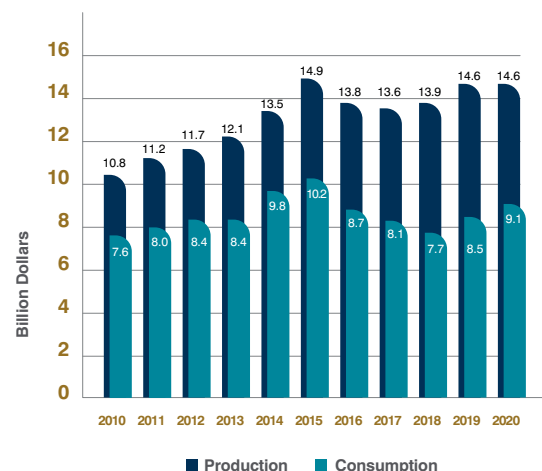


Source: American Industries with ITC Trade Map data.

### Mexico

In 2020, the production of medical devices in Mexico was valued at US 14.6 billion dollars with a compound annual growth rate (CAGR) of 3.1% over the last 10 years, while consumption reached US 9 billion dollars and a CAGR of 1.8%

**Production & Consumption**  
*Mexican Medical Devices Industry*



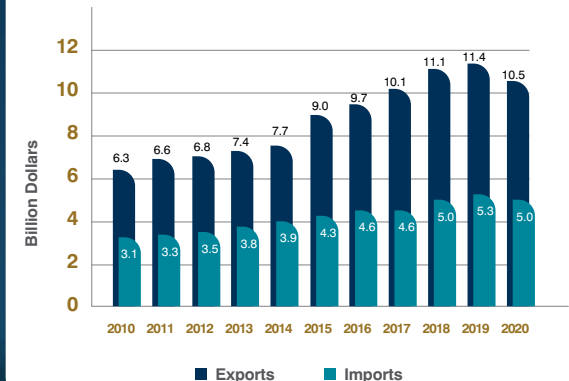
Source: American industries with INEGI and ITC Trade Map data.

### International Trade

Mexico's strategic location, free trade agreements, high-quality human capital and low operating costs provide many opportunities for international companies.

Mexican exports of medical devices reached US 10.5 billion in 2020 and grew at a CAGR of 5.3% over the last 10 years. In the same period, the percentage of national production that was exported increased from 58% to 72%.

**International Trade**  
*Mexican Medical Devices Industry*



Source: American Industries with ITC Trade Map data.

Product Label	Mexican Exports 2020	Mexican % Share of Global Exports	Global Ranking
Instruments and appliances used in medical, surgical or veterinary sciences.	3,980	7%	4
Needles, catheters, cannulae and the like, used in medical, surgical, dental or veterinary...	2,698	9%	4
Electro-diagnostic apparatus, incl. apparatus for functional exploratory examination or for...	680	4%	7
Orthopaedic appliances	601	6%	5
Spectacle lenses of materials other than glass	458	8%	3
Ozone therapy, oxygen therapy, aerosol therapy, artificial respiration or other therapeutic...	430	3%	10
Tubular metal needles and needles for sutures, used in medical, surgical, dental or veterinary...	275	10%	3
Mechano-therapy appliances; massage apparatus; psychological aptitude-testing apparatus	270	4%	4
Syringes, with or without needles, used in medical, surgical, dental or veterinary sciences	147	3%	9

Source: ITC Trade Map

Mexico is the 3<sup>rd</sup> and 4<sup>th</sup> largest exporter internationally for lenses made with other material than glass, tubular metal needles, needles for sutures, and instruments and appliances for medical use, as well as needles, catheters, and mechano-therapy appliances, among other products.

## Foreing Direct Investment

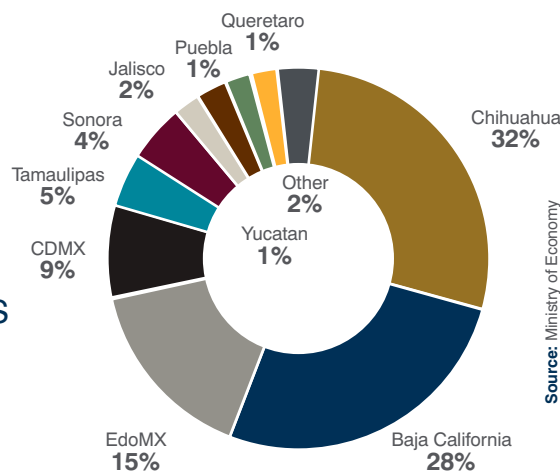
Mexico's proximity to one of the largest consumers of medical devices in the world, the United Sates, allows firms to respond quickly to changes in demand and thereby reduce inventory costs.

Moreover, the country has signed 30 **Reciprocal Investment Promotion and Protection Agreements (RIPPAs)** that provide foreign investors with a solid legal framework for doing business and have enabled the continuous flow of FDI into the country.

From 1999 to the second quarter of 2021 foreign direct investment reached a total of US 4,1 billion.

The state receiving the most IED in the medical devices industry was Chihuahua, followed by Baja California.

**Cumulative FDI from 1999-Q2 2021**  
**Mexican Medical Devices Industry**

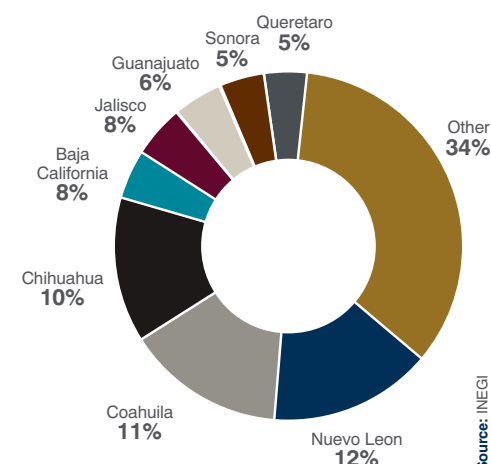


Mexico has more than 2,500 economic units related to the production of medical devices and employed more than 180,000 people in 2019 in the industry.

During this same period, Mexico's participation in subsectors 333-336, which includes the manufacture of machinery, computer equipment, communication equipment, measurement, medical equipment, electronic components among others, represented 39% of Mexico's entire manufacturing GDP, proof of the country's solid supplier base in the sector.

The states with the most participation in sectors are Nuevo Leon, Coahuila and Chihuahua.

**NAICS 333-336 Industry GDP/% Participation Per State 2019**



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