

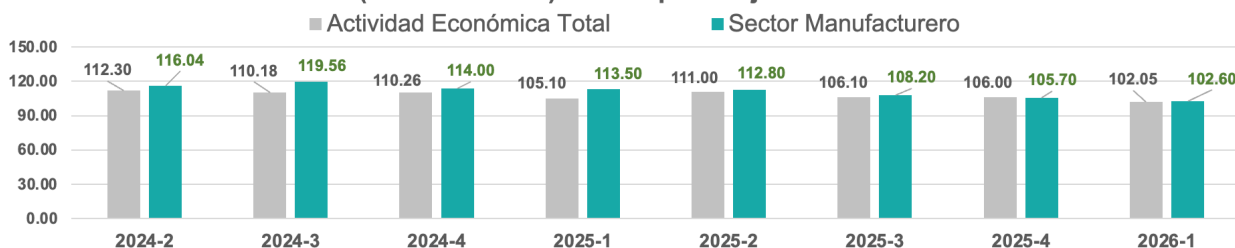
Análisis de coyuntura

- Al inicio de agosto el peso inicia con una depreciación de 0.11% o 1.9 centavos, cotizando alrededor de 17.36 pesos por dólar, con el tipo de cambio tocando un mínimo de 17.31 y un máximo de 17.37 pesos por dólar.
- Sobre finanzas públicas de México a junio, destaca la disminución de la deuda/PIB. El aspecto negativo es el recorte en gasto público en inversión física y la caída en la recaudación de ISR.
- A nivel regional durante la primera mitad de 2026, el consumo ha sido impulsado por el crédito pero, la morosidad va en aumento. Esto implica que el consumo no podrá mantener un crecimiento sostenido el resto del año.

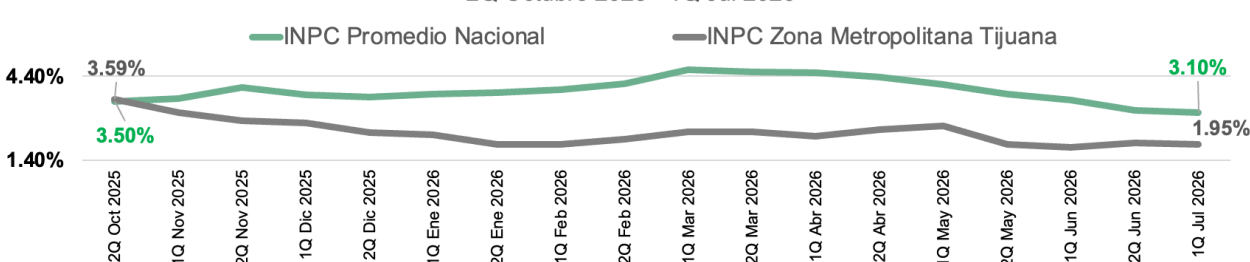
Situational analysis

- At the beginning of August, the peso depreciated by 0.11%, or 1.9 centavos, trading around 17.36 pesos per dollar, with the exchange rate reaching a low of 17.31 and a high of 17.37 pesos per dollar.
- Regarding Mexico's public finances as of June, the decrease in the debt-to-GDP ratio stands out. The negative aspect is the reduction in public spending on physical investment and the drop in income tax revenue.
- At the regional level, during the first half of 2026, consumption has been driven by credit, but delinquency rates are increasing. This implies that consumption will not be able to maintain sustained growth for the remainder of the year.

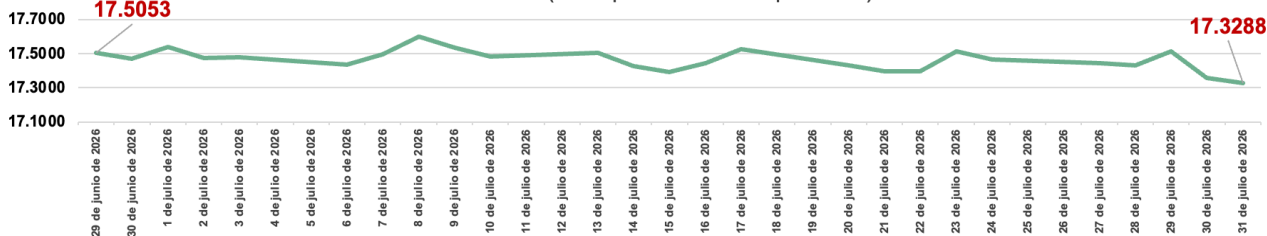
Indicador Trimestral de la Actividad Económica Estatal (ITAEE) (Base 2018=100) Índices para Baja California



Inflación Quincenal Acumulada Anualizada 2Q Octubre 2025 - 1Q Jul 2026



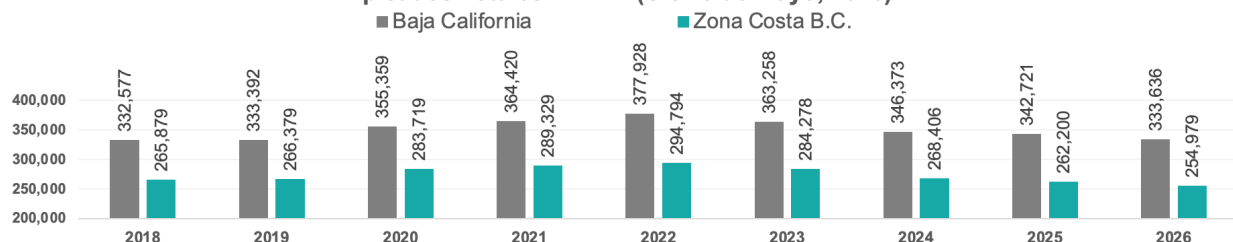
Tipo de Cambio (MXN / USD) Paridad Diaria (Valor para fecha de liquidación)



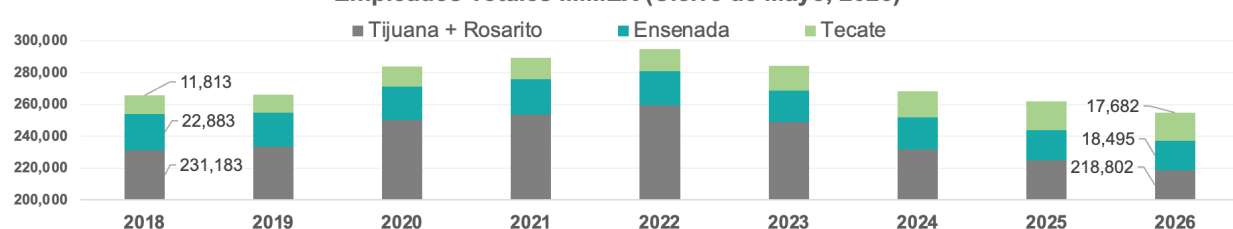
Fuentes: INEGI y Banco de México (Banxico).

Estadísticas del Mercado Laboral (1 de 2)

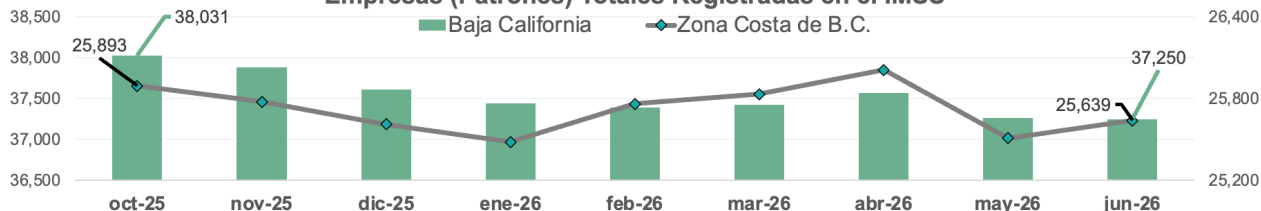
Empleados Totales IMMEX (Cierre de Mayo, 2026)



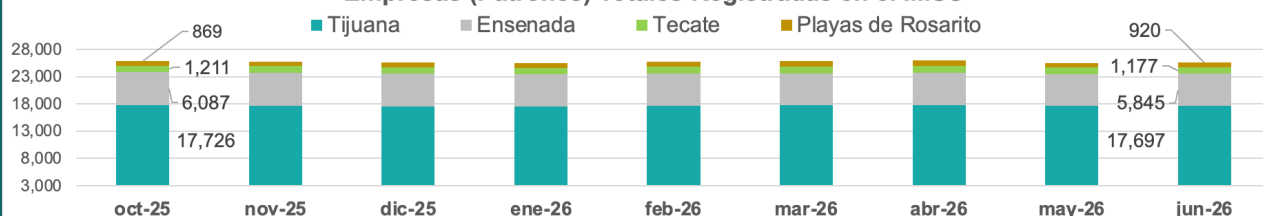
Empleados Totales IMMEX (Cierre de Mayo, 2026)



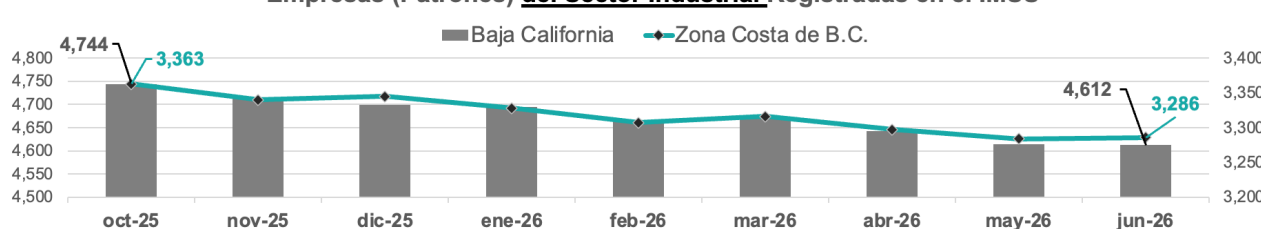
Empresas (Patrones) Totales Registradas en el IMSS



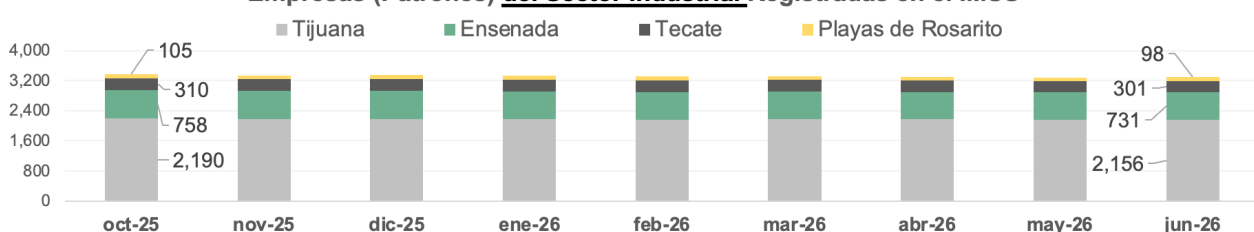
Empresas (Patrones) Totales Registradas en el IMSS



Empresas (Patrones) del Sector Industrial Registradas en el IMSS

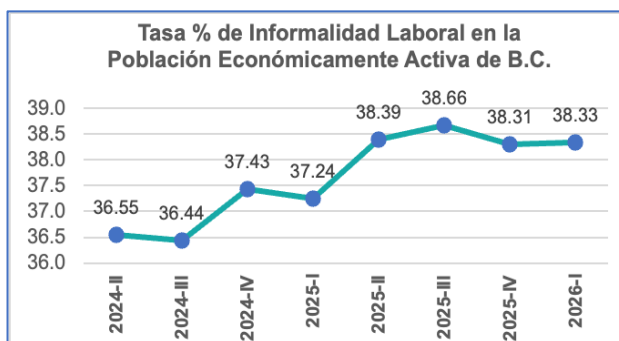
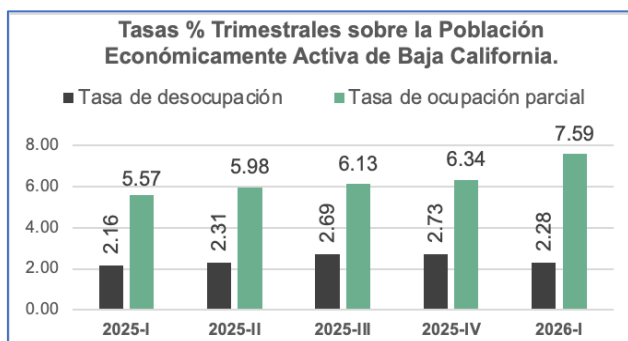
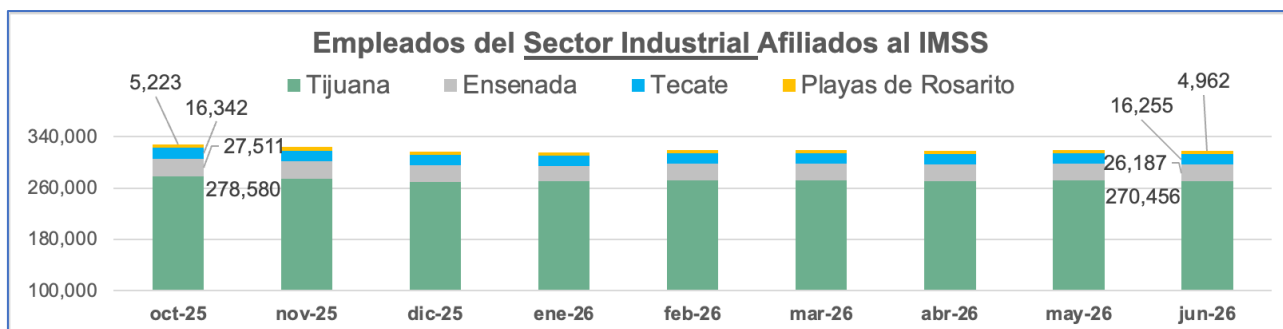
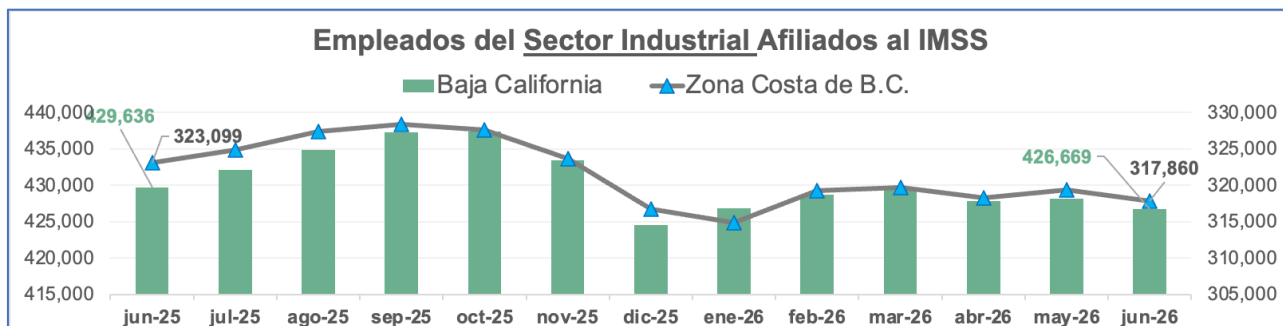
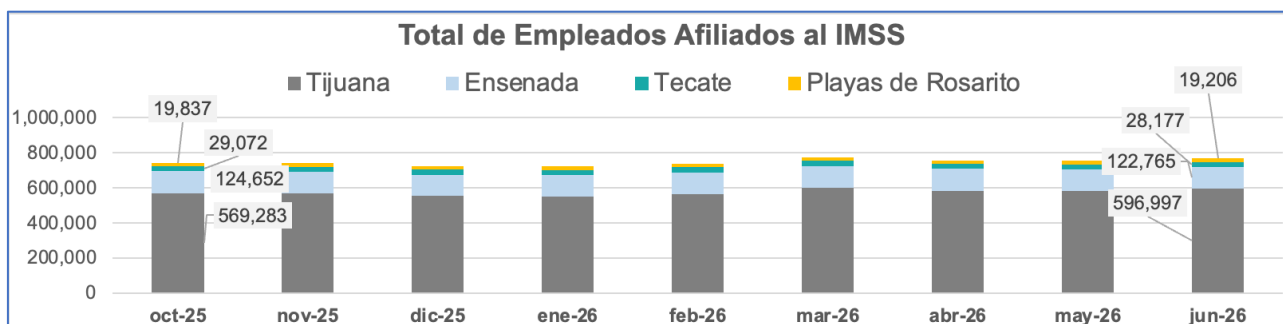
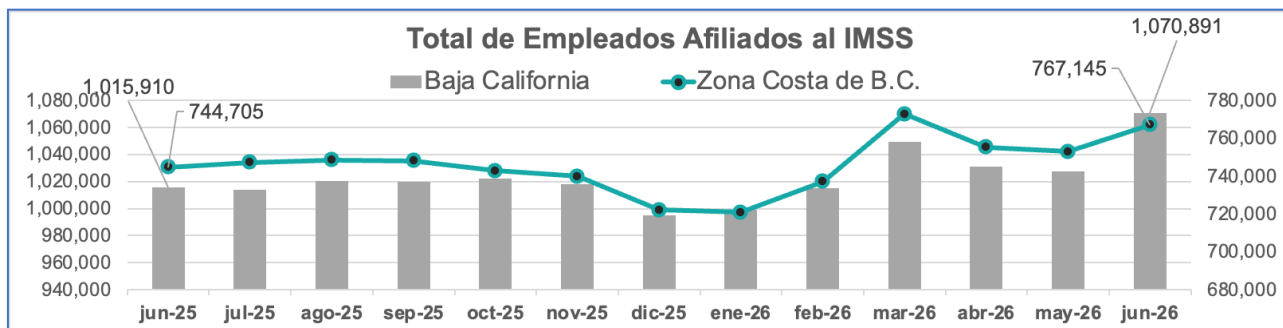


Empresas (Patrones) del Sector Industrial Registradas en el IMSS



Fuentes: INEGI e IMSS.

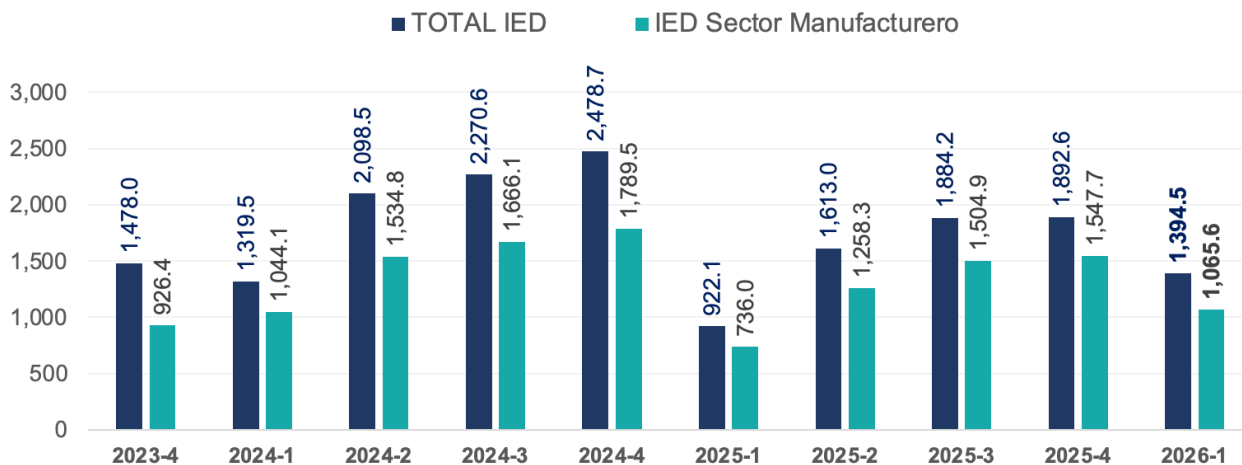
Estadísticas del Mercado Laboral (2 de 2)



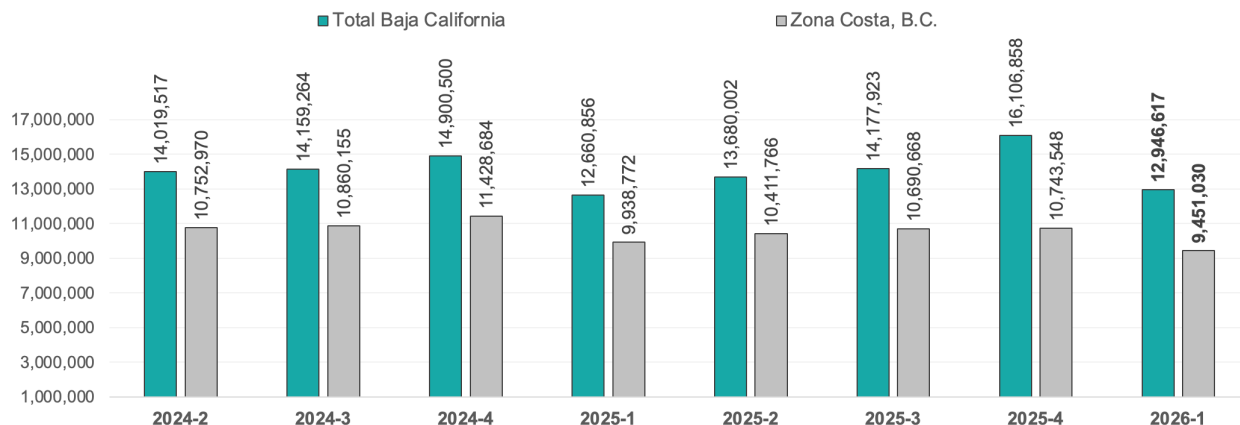
Fuentes: IMSS, INEGI y ENOE.

Estadísticas de Inversión y Comercio Exterior

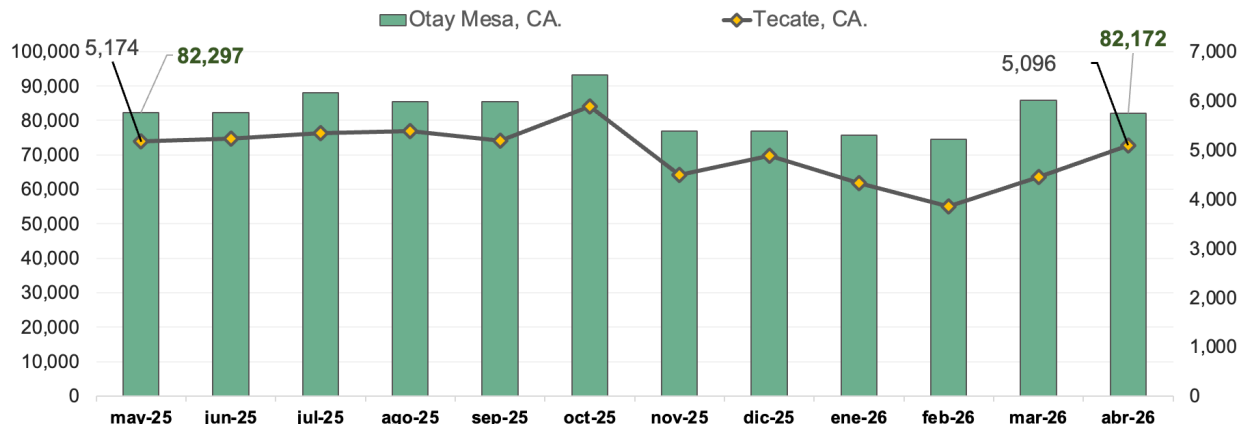
Inversión Extranjera Directa (IED) en Baja California Cifras Trimestrales en Millones de USD



Exportaciones Sector Manufacturero, Montos Trimestrales en Miles de USD



Cruce de Tractocamiones de Carga (Llenos) hacia los EE.UU. (Cifras Mensuales por Garita)



Fuentes: RNIE, SE GobMX, INEGI y GSA (Gob. EE.UU.).

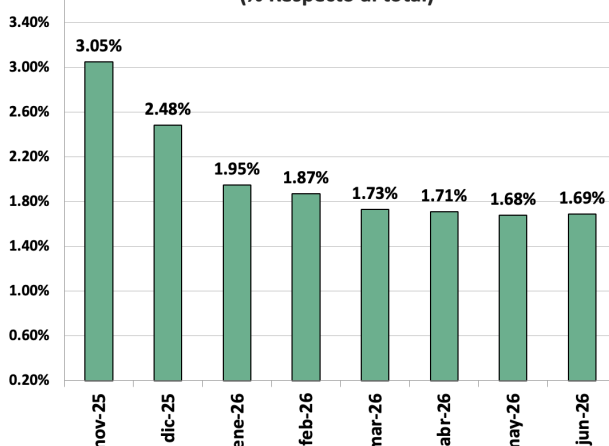
Estadísticas IMMEX

ESTABLECIMIENTOS IMMEX (No. de Naves Industriales)					
INDUSTRIAL BUILDINGS WITH IMMEX PERMIT					
	2023	2024	2025	Jun-26	Tendencia
NACIONAL (MX)	12,393	12,817	12,528	12,635	▲
BAJA CALIFORNIA	2,143	2,198	2,119	2,120	▲
ZONA COSTA	1,678	1,709	1,638	1,640	▲
TIJUANA	1,308	1,324	1,279	1,276	▲
ENSENADA	171	160	145	147	▲
TECATE	161	168	157	159	▲
PLAYAS DE ROSARITO	38	57	57	58	=
MEXICALI	465	489	481	480	▲
FUENTE / SOURCE: SNICE (S.E.) JUNIO-2026.					

PROGRAMAS IMMEX AUTORIZADOS (En Funcionamiento)					
AUTHORIZED IMMEX PROGRAMS (In Operations)					
	2023	2024	2025	Jun-26	Tendencia
NACIONAL (MX)	6,033	6,100	5,964	5,998	▲
BAJA CALIFORNIA	1,127	1,106	1,064	1,067	▼
ZONA COSTA	921	903	861	868	▲
TIJUANA	699	681	663	670	▲
TECATE	105	111	98	97	▼
ENSENADA	93	82	72	75	▲
PLAYAS DE ROSARITO	24	29	28	26	▼
MEXICALI	206	203	203	199	▼
FUENTE / SOURCE: SNICE (S.E.), JUNIO-2026.					

EMPLEADOS IMMEX (INEGI)					
IMMEX EMPLOYEES (INEGI)					
	2023	2024	2025	May-26	Tendencia
NACIONAL	2,914,332	2,892,555	2,796,849	2,814,347	▲
BAJA CALIFORNIA	363,258	346,373	342,721	333,636	▼
ZONA COSTA	284,278	268,406	262,200	254,979	▼
TIJUANA + ROSARITO	248,944	231,596	225,114	218,802	▼
ENSENADA	19,854	20,274	18,983	18,495	▲
TECATE	15,480	16,536	18,103	17,682	▼
MEXICALI	78,980	77,967	80,521	78,657	▼
FUENTE / SOURCE: INEGI, MAYO - 2026					

Rotación de Personal Mensual IMMEX
Tendencia Zona Costa, B.C.
(% Respecto al total)



PERSONAL OCUPADO IMMEX (CLASIFICADO POR ÁREA Y TIPO DE CONTRATACIÓN)							
IMMEX EMPLOYEES (CLASSIFIED BY AREA AND HIRING TYPE)							
		BAJA CALIFORNIA	ZONA COSTA, B.C.	TIJUANA + ROSARITO	TECATE	ENSENADA	MEXICALI
CONTRATADOS DIRECTAMENTE	TOTAL	331,941	253,456	218,562	16,400	18,494	78,485
	PRODUCCIÓN Y TÉCNICOS	291,045	223,901	193,056	14,625	16,220	67,144
	ADMINISTRATIVOS	40,896	29,555	25,506	1,775	2,274	11,341
SUBCONTRATADOS	TOTAL	1,695	1,523	240	1,282	1	172
	PRODUCCIÓN Y TÉCNICOS	917	764	158	605	1	153
	ADMINISTRATIVOS	778	759	82	677	0	19
FUENTE / SOURCE: INEGI (IMMEX PROGRAM DATABASE) MAYO-2026.							

Estadísticas IMMEX

CONSUMO DE BIENES Y SERVICIOS IMMEX DE ORIGEN MEXICANO					
CONSUMPTION OF IMMEX GOODS AND SERVICES OF MEXICAN ORIGIN.					
	2023	2024	2025	may-26	Tendencia
CIFRAS EN MILES DE PESOS / DATA IN THOUSANDS OF MXN					
NACIONAL (MX)	2,826,608,636	3,053,643,122	2,953,593,313	235,095,318	▲
BAJA CALIFORNIA	43,290,495	48,252,881	51,481,841	3,998,484	▼
ZONA COSTA, B.C.	17,812,477	21,064,512	26,654,013	2,079,708	▼
TIJUANA + ROSARITO	13,573,111	17,008,551	22,429,834	1,726,561	▼
TECATE	3,490,091	3,329,998	3,653,380	331,928	▼
ENSENADA	749,275	725,963	570,799	21,219	▼
MEXICALI	25,478,018	27,188,369	24,827,828	1,218,776	▼
FUENTE / SOURCE: INEGI (IMMEX PROGRAM DATABASE) MAYO-2026					

CONSUMO DE BIENES Y SERVICIOS IMMEX DE ORIGEN EXTRANJERO					
CONSUMPTION OF IMMEX GOODS AND SERVICES OF FOREIGN ORIGIN.					
	2023	2024	2025	may-26	Tendencia
CIFRAS EN MILES DE PESOS / DATA IN THOUSANDS OF MXN					
NACIONAL (MX)	4,186,013,961	4,367,932,105	4,566,096,459	387,446,281	▲
BAJA CALIFORNIA	325,554,892	341,001,167	390,972,951	35,502,907	▲
ZONA COSTA, B.C.	261,041,714	272,346,014	205,037,321	29,211,739	▲
TIJUANA + ROSARITO	239,092,867	201,492,211	13,675,546	16,058,380	▼
TECATE	10,893,616	59,368,626	75,354,903	11,916,666	▲
ENSENADA	11,055,231	11,485,177	116,006,872	1,236,693	▲
MEXICALI	64,513,181	68,655,147	185,935,630	6,291,168	▲
FUENTE / SOURCE: INEGI (IMMEX PROGRAM DATABASE) MAYO-2026					

CONSUMO DE INSUMOS (MATERIA PRIMA Y MATERIALES) DE ORIGEN EXTRANJERO					
CONSUMPTION OF SUPPLIES (RAW MATERIALS AND MATERIALS) OF FOREIGN ORIGIN					
	TOTAL 2023	TOTAL 2024	TOTAL 2025	may-26	Tendencia
CIFRAS EN MILES DE PESOS / DATA IN THOUSANDS OF MXN					
NACIONAL	5,057,553,954	4,880,212,574	5,141,369,685	451,938,646	▲
BAJA CALIFORNIA	634,033,156	688,262,458	748,143,240	55,018,187	▼
ZONA COSTA, B.C.	508,435,298	554,064,695	597,541,154	44,808,588	▼
TIJUANA + ROSARITO	472,283,938	491,527,056	492,956,801	35,117,807	▲
TECATE	15,342,119	41,016,543	103,890,161	8,102,287	▼
ENSENADA	20,809,241	21,521,096	694,192	1,588,494	▼
MEXICALI	125,597,858	134,196,763	130,009,470	10,209,599	▼
FUENTE / SOURCE: INEGI (IMMEX PROGRAM DATABASE) MAYO 2026					

CONSUMO DE INSUMOS (MATERIA PRIMA Y MATERIALES) DE ORIGEN MEXICANO					
CONSUMPTION OF SUPPLIES (RAW MATERIALS AND MATERIALS) OF MEXICAN ORIGIN					
	TOTAL 2023	TOTAL 2024	TOTAL 2025	may-26	Tendencia
CIFRAS EN MILES DE PESOS / DATA IN THOUSANDS OF MXN					
NACIONAL	1,930,715,473	2,002,563,675	2,324,437,390	178,310,752	▼
BAJA CALIFORNIA	23,145,798	20,025,151	20,878,562	1,497,548	▼
ZONA COSTA, B.C.	11,264,128	9,771,345	10,243,075	668,989	▼
TIJUANA + ROSARITO	9,412,866	8,616,185	9,103,237	564,362	▼
TECATE	512,815	344,583	445,646	54,870	▲
ENSENADA	1,338,447	810,577	694,192	49,757	▼
MEXICALI	11,881,670	10,253,806	10,635,487	828,559	▼
FUENTE / SOURCE: INEGI (IMMEX PROGRAM DATABASE) MAYO-2026					

PAGOS POR ALQUILER DE BIENES MUEBLES E INMUEBLES, SUMINISTRO DE PERSONAL, FLETES, SERVICIOS DE MAQUILA, SUBMAQUILA, REMANUFACTURA, SERVICIOS PROFESIONALES, TRÁMITES ADUANALES Y OTROS SERVICIOS.

PAYMENTS FOR MOVABLE AND REAL ESTATE PROPERTY RENTALS, PERSONNEL SUPPLY, FREIGHTS, MAQUILA SERVICES, SUBMAQUILA, REMANUFACTURING, PROFESSIONAL SERVICES, CUSTOMS PROCEDURES AND OTHER SERVICES.

CIFRAS EN MILES DE PESOS / DATA IN THOUSANDS OF MXN

	TOTAL 2023	TOTAL 2024	TOTAL 2025	may-26	Tendencia
NACIONAL	749,416,323	888,020,175	983,342,239	77,665,124	▼
BAJA CALIFORNIA	78,362,077	90,834,272	98,758,147	7,576,510	▼
ZONA COSTA, B.C.	54,744,873	62,523,110	67,672,206	5,094,190	▼
TIJUANA + ROSARITO	48,524,183	50,887,356	52,469,858	4,033,707	▼
TECATE	2,909,698	8,319,919	11,884,095	817,963	▼
ENSENADA	3,310,992	3,315,835	3,318,253	242,520	▼
MEXICALI	23,617,204	28,317,162	31,085,941	2,482,320	▼

FUENTE / SOURCE: INEGI (IMMEX PROGRAM DATABASE) MAYO-2026

INFORME GSA (CBP) DE LA GARITA COMERCIAL DE OTAY MESA, CA. (DICIEMBRE, 2025)

Otay Mesa Cargo Facility - FY 2025 and FY 2026 thru December

Workload	December 2024	December 2025	% Change	FY25 thru December	FY26 thru December	% Change
Total Trucks	76,392	76,843	0.59%	256,786	246,902	-3.85%
Full Trucks	55,349	58,812	6.26%	188,823	191,030	1.17%
Total Trucks	76,390	76,860	0.62%	256,787	246,950	-3.83%
Total Trains	14	13	-7.14%	45	44	-2.22%
Import Mdse Value (millions)	\$3,280.20	\$3,585.70	9.31%	11,329	11,610	2.48%
FAST + CTPAT % of Laden	34.30%	29.60%	-13.73%	38.30%	33.40%	-12.85%
Export Mdse Value (Millions)	\$1,831.90	\$1,511	-17.53%	\$6,529	\$5,133	-21.39%
Export Volume of AES ITNs	\$34,620.00	\$35,390	2.22%	\$115,658	\$113,872	-1.54%

INFORME GSA (CBP) DE LA GARITA COMERCIAL DE TECATE, CA. (DICIEMBRE, 2025)

Tecate Cargo Facility - FY 2025 and FY 2026 thru December

Workload	December 2024	December 2025	% Change	FY25 thru December	FY26 thru December	% Change
Total Trucks	4,381	4,879	11.37%	14,687	15,258	3.89%
Full Truck Containers	2,900	2,495	-13.97%	9,206	8,115	-11.85%
Total Truck Containers	4,381	4,880	11.39%	14,688	15,263	3.91%
Import Mdse Value (millions)	\$75.20	\$72.40	-3.75%	\$234.80	\$211.60	-9.90%
Export Mdse Value (millions)	\$24.60	\$26.90	9.39%	\$94.60	\$100.10	5.80%
Export Volume of AES ITNs	712	758	6.46%	2,461	2,672	8.57%

Fuente / Source: CBP (DECEMBER-2025)