

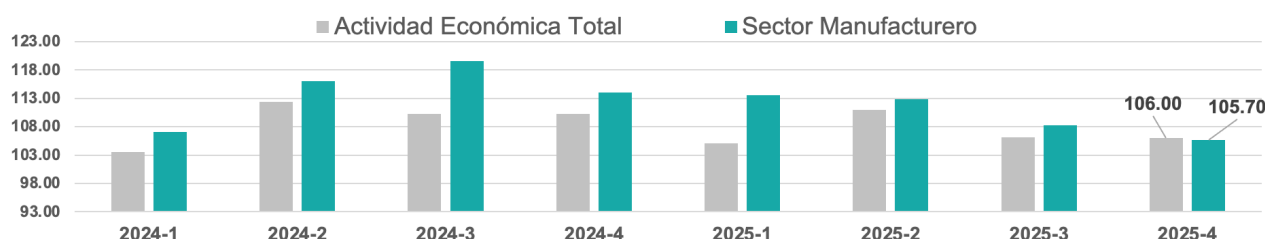
Análisis de coyuntura

- Los costos de fletes marítimos han subido significativamente por la guerra. Esto es algo que provocó presiones fuertes después de la pandemia, por lo que aún no se puede cantar victoria con la inflación.
- En México, la actividad económica creció 1.20% mensual y 2.17% anual en abril. El impulso se debió principalmente a la construcción, que creció 7.63% mensual, el mayor desde agosto del 2020. Este crecimiento se estima fue impulsado por las obras relacionadas al Mundial de Fútbol.
- En 2026, el empleo en México ha crecido en 26 mil personas. Esto se explica por un aumento de 370 mil empleos en la informalidad y una pérdida de 343 mil empleos formales.

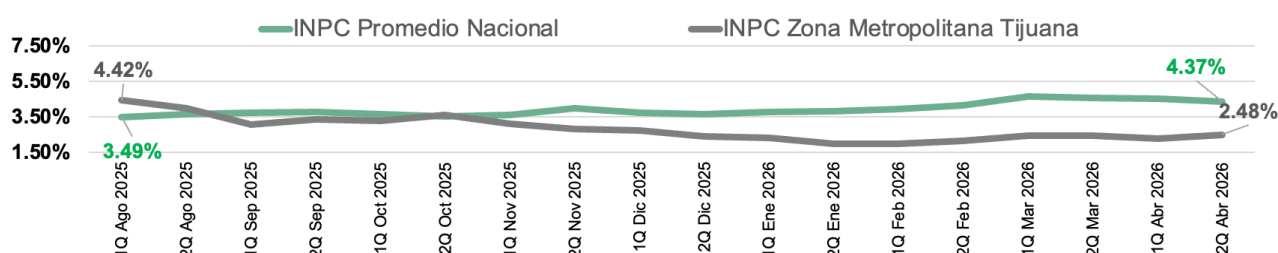
Situational analysis

- Shipping costs have risen significantly due to the war. This has put significant pressure on inflation since the pandemic, so it's too early to declare victory.
- In Mexico, economic activity grew 1.20% month-on-month and 2.17% year-on-year in April. This growth was primarily driven by construction, which grew 7.63% month-on-month, the highest rate since August 2020. This growth is estimated to have been fueled by construction projects related to the World Cup.
- By 2026, employment in Mexico is projected to increase by 26,000 people. This is attributed to an increase of 370,000 informal jobs and a loss of 343,000 formal jobs..

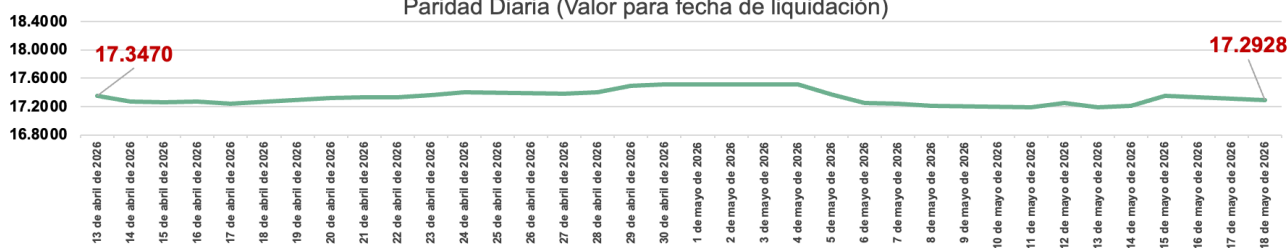
Indicador Trimestral de la Actividad Económica Estatal (ITAEE)
(Base 2018=100) Índices para Baja California



Inflación Quincenal Acumulada Anualizada
1Q Agosto 2025 - 2Q Abr 2026



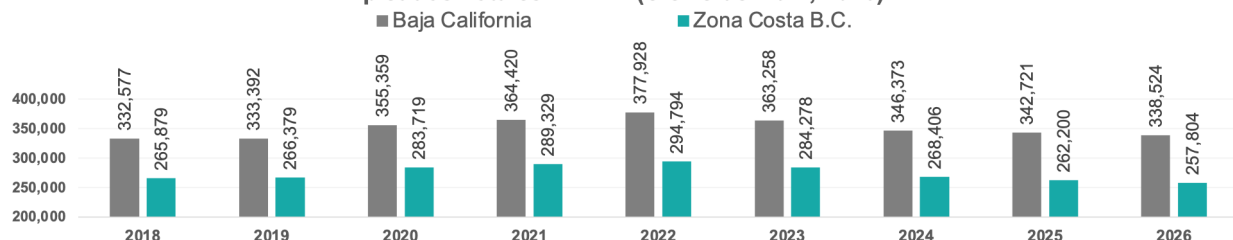
Tipo de Cambio (MXN / USD)
Paridad Diaria (Valor para fecha de liquidación)



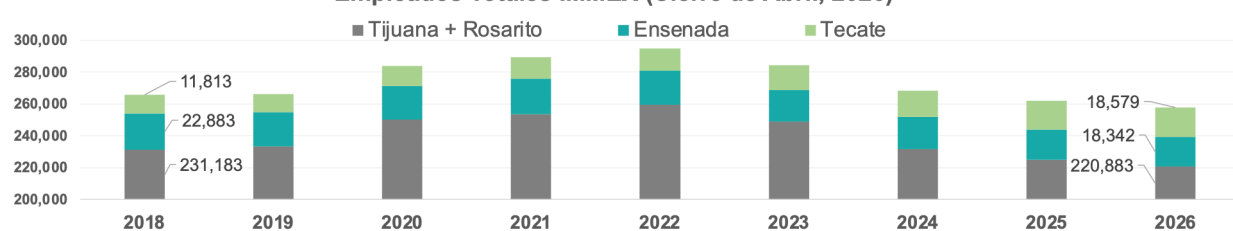
Fuentes: INEGI y Banco de México (Banxico).

Estadísticas del Mercado Laboral (1 de 2)

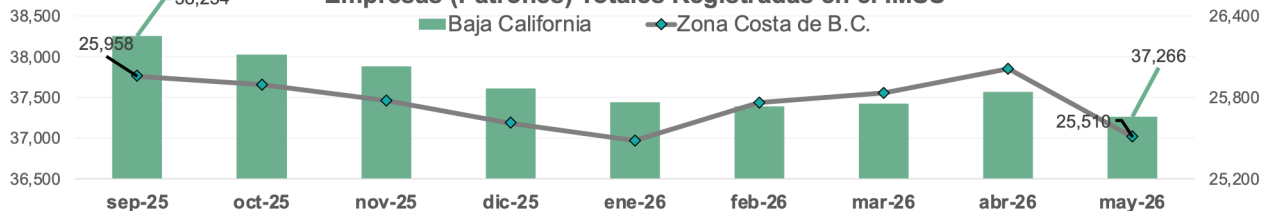
Empleados Totales IMMEX (Cierre de Abril, 2026)



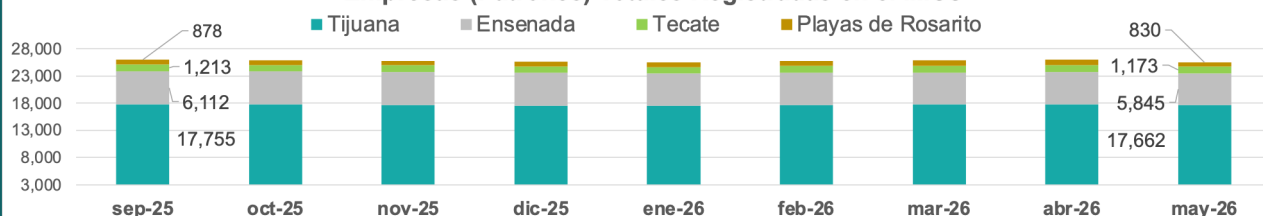
Empleados Totales IMMEX (Cierre de Abril, 2026)



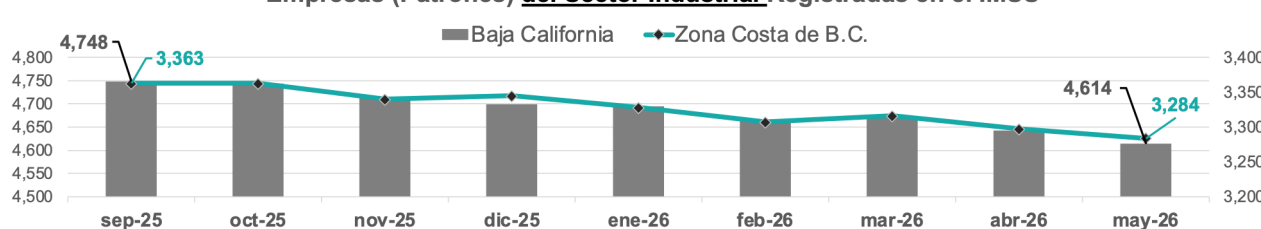
Empresas (Patrones) Totales Registradas en el IMSS



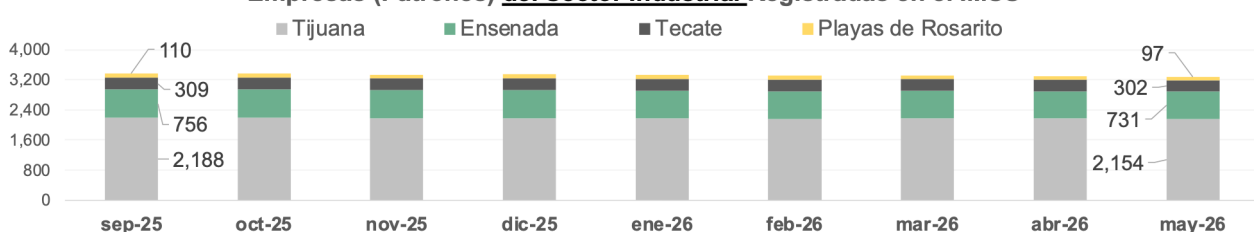
Empresas (Patrones) Totales Registradas en el IMSS



Empresas (Patrones) del Sector Industrial Registradas en el IMSS

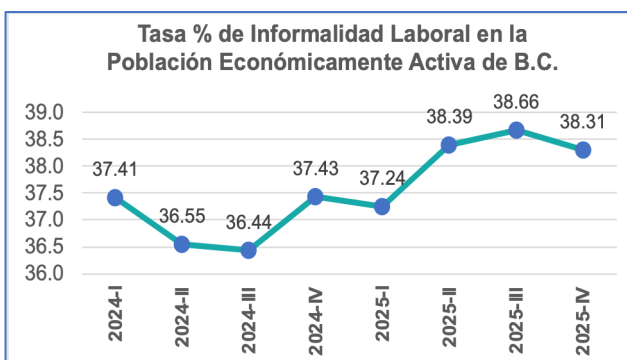
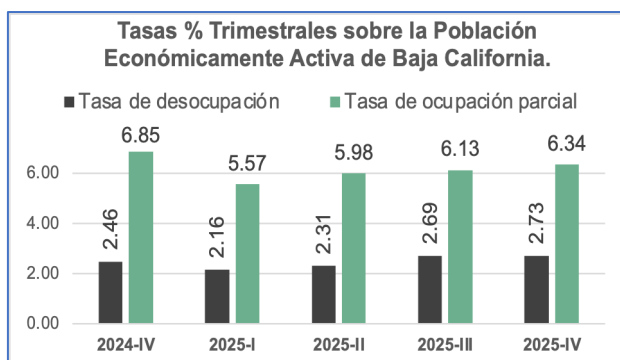
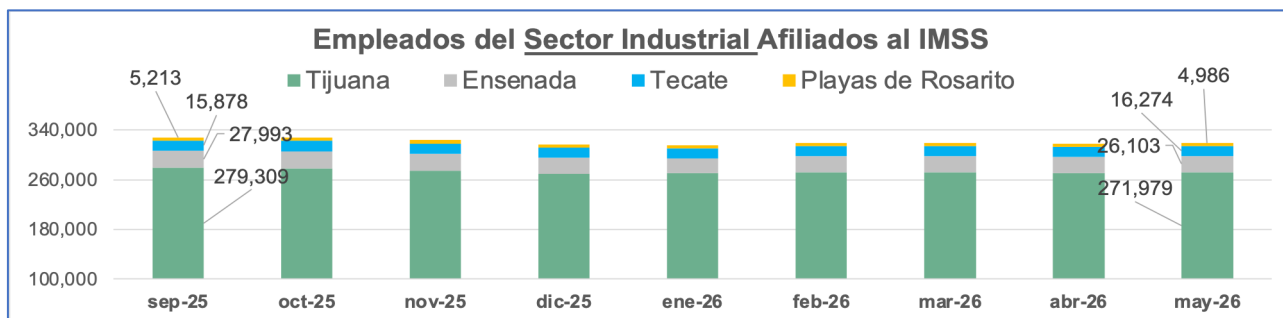
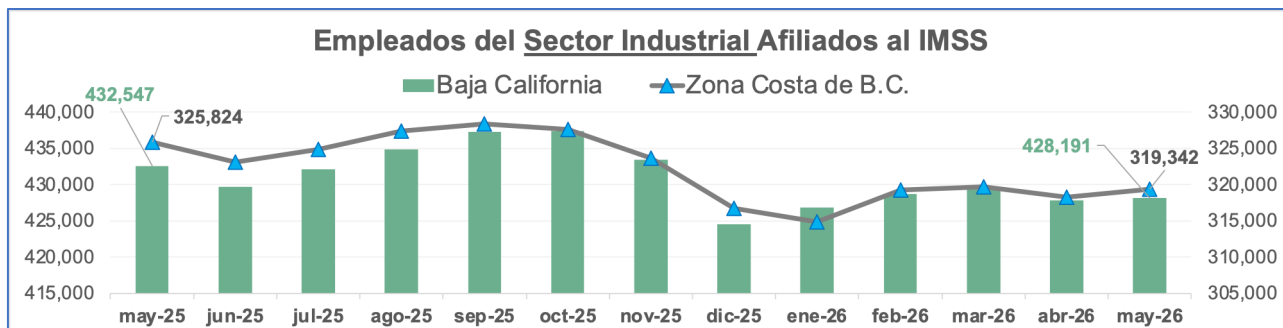
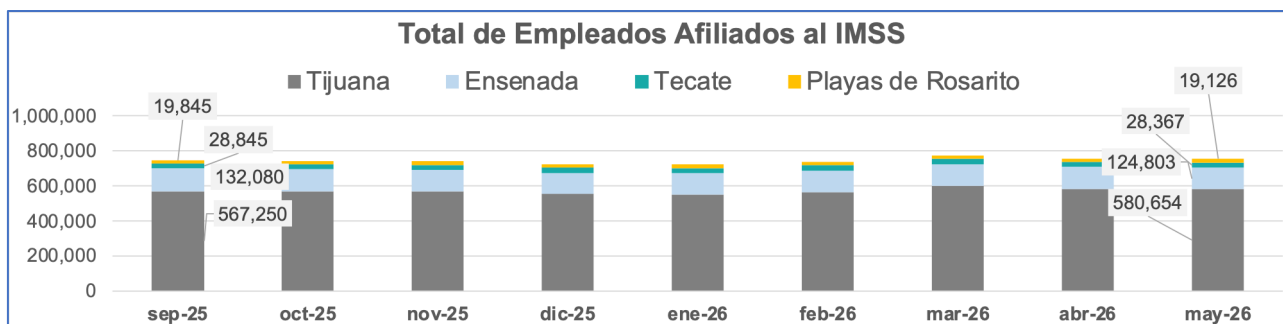
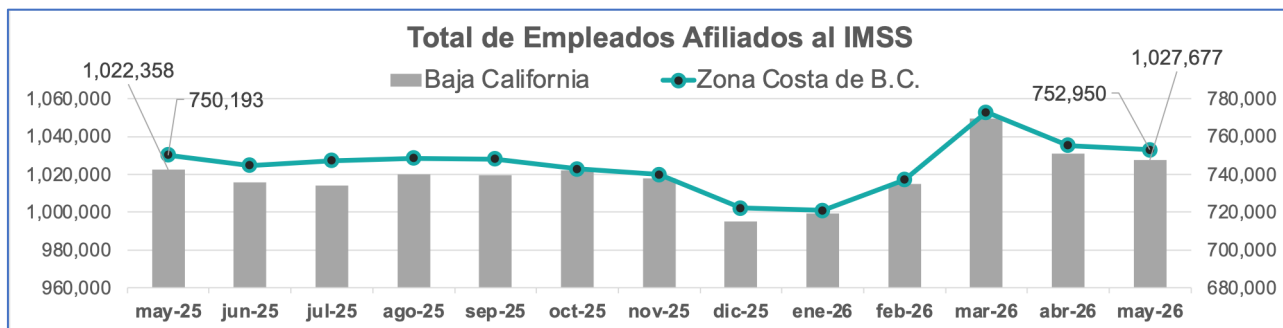


Empresas (Patrones) del Sector Industrial Registradas en el IMSS



Fuentes: INEGI e IMSS.

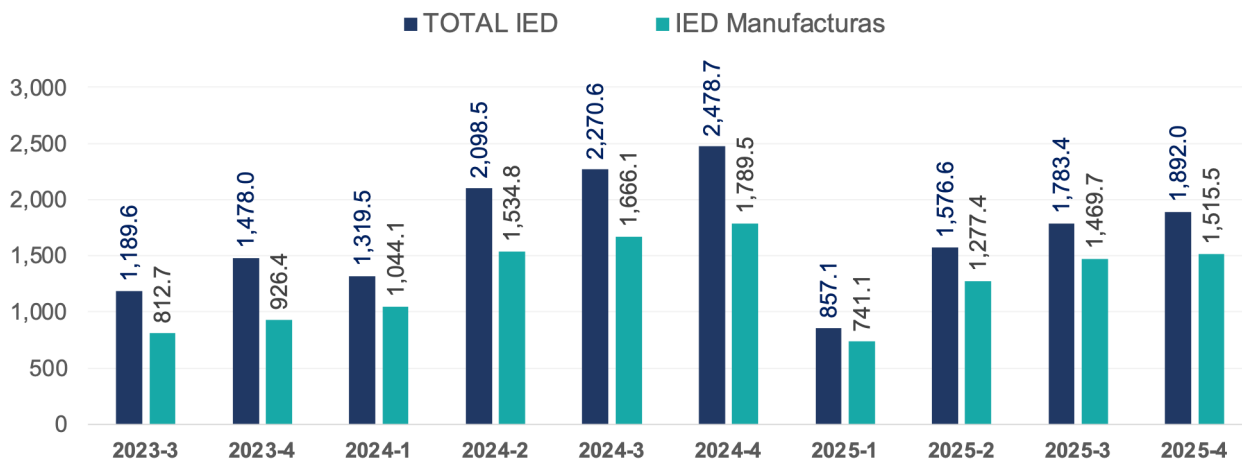
Estadísticas del Mercado Laboral (2 de 2)



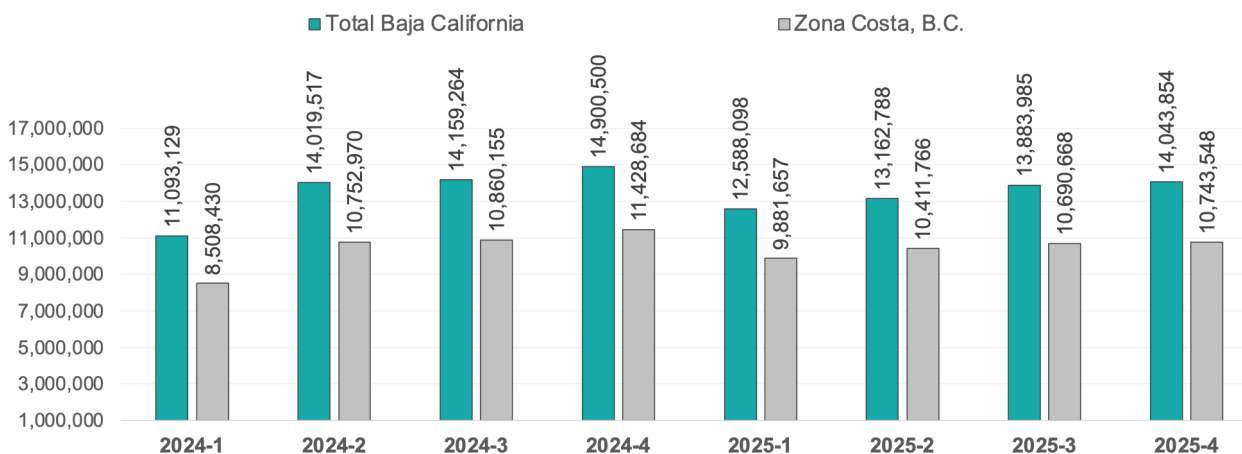
Fuentes: IMSS, INEGI y ENOE.

Estadísticas de Inversión y Comercio Exterior

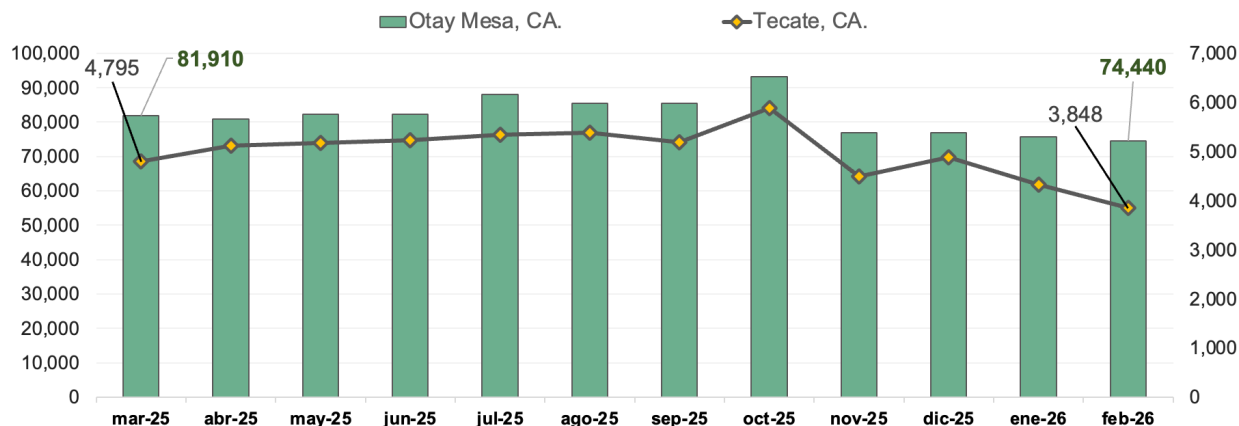
Inversión Extranjera Directa (IED) en Baja California Cifras Trimestrales en Millones de USD



Exportaciones Sector Manufacturero, Montos Trimestrales en Miles de USD



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



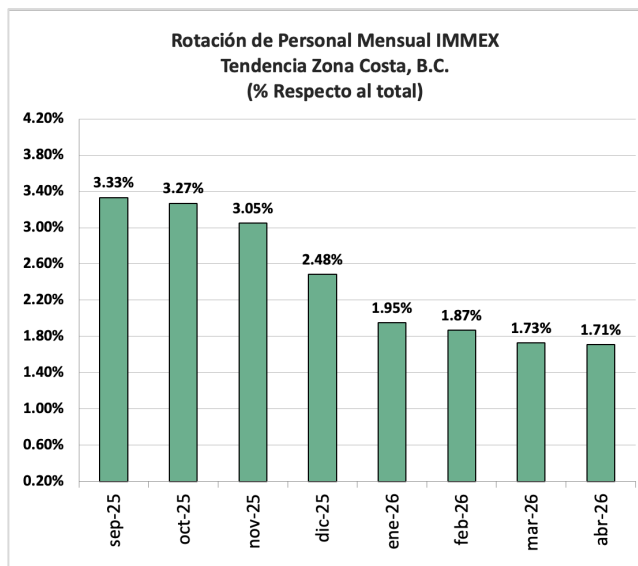
Fuentes: RNIE, SE GobMX, INEGI y GSA (Gob. EE.UU.).

Estadísticas IMMEX

ESTABLECIMIENTOS IMMEX (No. de Naves Industriales)					
INDUSTRIAL BUILDINGS WITH IMMEX PERMIT					
	2023	2024	2025	May-26	Tendencia
NACIONAL (MX)	12,393	12,817	12,528	12,601	▲
BAJA CALIFORNIA	2,143	2,198	2,119	2,113	▲
ZONA COSTA	1,678	1,709	1,638	1,636	▲
TIJUANA	1,308	1,324	1,279	1,274	▲
ENSENADA	171	160	145	146	▲
TECATE	161	168	157	158	=
PLAYAS DE ROSARITO	38	57	57	58	=
MEXICALI	465	489	481	477	▲
FUENTE / SOURCE: SNICE (S.E.) MAYO-2026.					

PROGRAMAS IMMEX AUTORIZADOS (En Funcionamiento)					
AUTHORIZED IMMEX PROGRAMS (In Operations)					
	2023	2024	2025	May-26	Tendencia
NACIONAL (MX)	6,033	6,100	5,964	5,992	▲
BAJA CALIFORNIA	1,127	1,106	1,064	1,069	▲
ZONA COSTA	921	903	861	867	▲
TIJUANA	699	681	663	668	▲
TECATE	105	111	98	98	=
ENSENADA	93	82	72	73	▲
PLAYAS DE ROSARITO	24	29	28	28	▼
MEXICALI	206	203	203	200	▼
FUENTE / SOURCE: SNICE (S.E.), MAYO-2026.					

EMPLEADOS IMMEX (INEGI)					
IMMEX EMPLOYEES (INEGI)					
	2023	2024	2025	Abr-26	Tendencia
NACIONAL	2,914,332	2,892,555	2,796,849	2,801,976	▲
BAJA CALIFORNIA	363,258	346,373	342,721	338,524	▲
ZONA COSTA	284,278	268,406	262,200	257,804	▼
TIJUANA + ROSARITO	248,944	231,596	225,114	220,883	▼
ENSENADA	19,854	20,274	18,983	18,342	▼
TECATE	15,480	16,536	18,103	18,579	▲
MEXICALI	78,980	77,967	80,521	80,720	▲
FUENTE / SOURCE: INEGI, ABRIL - 2026					



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	336,757	256,208	220,584	17,283	18,341	80,549
	PRODUCCIÓN Y TÉCNICOS	295,331	226,325	194,852	15,408	16,065	69,006
	ADMINISTRATIVOS	41,426	29,883	25,732	1,875	2,276	11,543
SUBCONTRATADOS	TOTAL	1,767	1,596	299	1,296	1	171
	PRODUCCIÓN Y TÉCNICOS	909	751	228	522	1	158
	ADMINISTRATIVOS	858	845	71	774	0	13
FUENTE / SOURCE: INEGI (IMMEX PROGRAM DATABASE) ABRIL-2026.							

Estadísticas IMMEX

CONSUMO DE BIENES Y SERVICIOS IMMEX DE ORIGEN MEXICANO					
CONSUMPTION OF IMMEX GOODS AND SERVICES OF MEXICAN ORIGIN.					
	2023	2024	2025	abr-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	231,550,706	▼
BAJA CALIFORNIA	43,290,495	48,252,881	51,481,841	4,241,416	▼
ZONA COSTA, B.C.	17,812,477	21,064,512	26,654,013	2,237,559	▼
TIJUANA + ROSARITO	13,573,111	17,008,551	22,429,834	1,854,644	▼
TECATE	3,490,091	3,329,998	3,653,380	359,291	▼
ENSENADA	749,275	725,963	570,799	23,624	▼
MEXICALI	25,478,018	27,188,369	24,827,828	2,003,857	▼
FUENTE / SOURCE: INEGI (IMMEX PROGRAM DATABASE) ABRIL-2026					

CONSUMO DE BIENES Y SERVICIOS IMMEX DE ORIGEN EXTRANJERO					
CONSUMPTION OF IMMEX GOODS AND SERVICES OF FOREIGN ORIGIN.					
	2023	2024	2025	abr-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	375,751,187	▼
BAJA CALIFORNIA	325,554,892	341,001,167	390,972,951	31,965,602	▼
ZONA COSTA, B.C.	261,041,714	272,346,014	205,037,321	25,623,930	▼
TIJUANA + ROSARITO	239,092,867	201,492,211	13,675,546	16,180,617	▲
TECATE	10,893,616	59,368,626	75,354,903	8,224,800	▼
ENSENADA	11,055,231	11,485,177	116,006,872	1,218,513	▼
MEXICALI	64,513,181	68,655,147	185,935,630	6,341,672	▼
FUENTE / SOURCE: INEGI (IMMEX PROGRAM DATABASE) ABRIL-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	abr-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	446,273,197	▲
BAJA CALIFORNIA	634,033,156	688,262,458	748,143,240	56,620,839	▼
ZONA COSTA, B.C.	508,435,298	554,064,695	597,541,154	44,252,447	▲
TIJUANA + ROSARITO	472,283,938	491,527,056	492,956,801	33,696,887	▲
TECATE	15,342,119	41,016,543	103,890,161	8,866,091	▲
ENSENADA	20,809,241	21,521,096	694,192	1,689,469	▼
MEXICALI	125,597,858	134,196,763	130,009,470	14,436,158	▲
FUENTE / SOURCE: INEGI (IMMEX PROGRAM DATABASE) ABRIL 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	abr-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	184,664,614	▲
BAJA CALIFORNIA	23,145,798	20,025,151	20,878,562	1,695,216	▼
ZONA COSTA, B.C.	11,264,128	9,771,345	10,243,075	798,603	▲
TIJUANA + ROSARITO	9,412,866	8,616,185	9,103,237	684,138	▲
TECATE	512,815	344,583	445,646	48,573	▼
ENSENADA	1,338,447	810,577	694,192	65,892	▲
MEXICALI	11,881,670	10,253,806	10,635,487	896,613	▼
FUENTE / SOURCE: INEGI (IMMEX PROGRAM DATABASE) ABRIL-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	abr-26	Tendencia
NACIONAL	749,416,323	888,020,175	983,342,239	83,424,107	▲
BAJA CALIFORNIA	78,362,077	90,834,272	98,758,147	8,395,485	▲
ZONA COSTA, B.C.	54,744,873	62,523,110	67,672,206	5,764,348	▲
TIJUANA + ROSARITO	48,524,183	50,887,356	52,469,858	4,383,261	▲
TECATE	2,909,698	8,319,919	11,884,095	1,121,136	▲
ENSENADA	3,310,992	3,315,835	3,318,253	259,951	▼
MEXICALI	23,617,204	28,317,162	31,085,941	2,621,137	▼
FUENTE / SOURCE: INEGI (IMMEX PROGRAM DATABASE) ABRIL-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)