

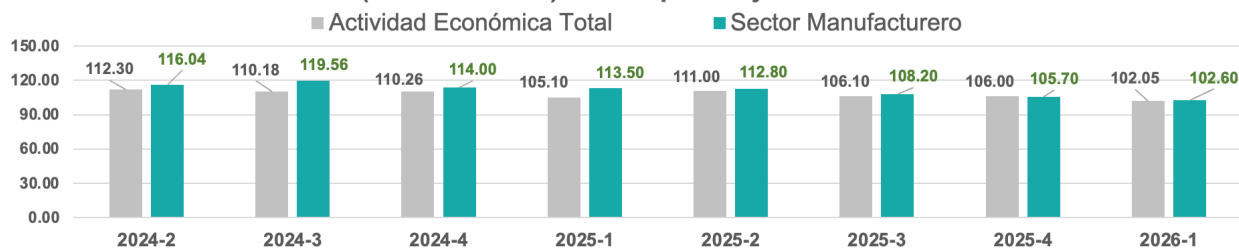
Análisis de coyuntura

- El peso inicia septiembre con apreciación de 0.05% o 0.8 centavos, llegando a 16.91 pesos por dólar, nuevo mínimo y desde el 29 de mayo de 2024. **Pros de la apreciación del peso:** Ayuda a bajar la inflación y sube el rendimiento en dólares de instrumentos denominados en pesos. **Contras de la apreciación del peso:** Pérdida de poder adquisitivo de las remesas, Pérdida de competitividad de exportaciones y Desincentiva la entrada de inversión extranjera directa.
- Entre los 35 principales países de los que más importa EEUU, China registró el arancel efectivo promedio más alto, con 19.99%, seguido de Camboya (19.41%), Indonesia (13.40%), Turquía (12.23%) y Japón (10.49%). **México se ubicó en la posición 29**, con un arancel efectivo promedio de 2.90%, disminuyendo desde el 3.40% registrado en junio. El arancel promedio cobrado a México es el menor desde febrero del 2025.

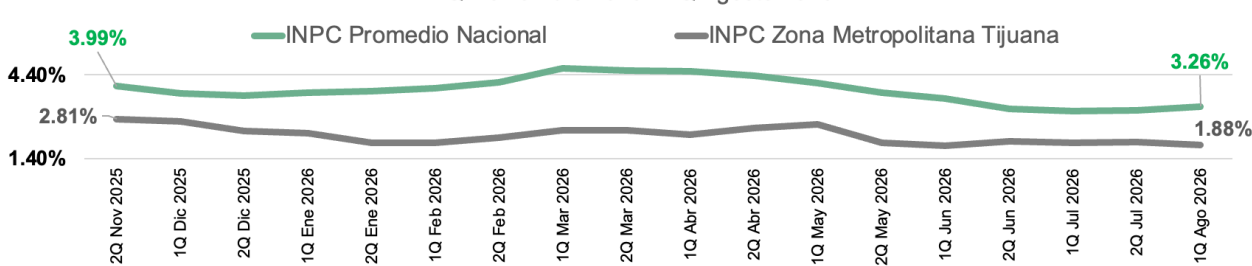
Situational analysis

- The peso begins September with an appreciation of 0.05% (or 0.8 centavos), reaching 16.91 pesos per dollar—a new low since May 29, 2024. **Pros of the peso's appreciation:** it helps lower inflation and increases the dollar-denominated return on peso-denominated instruments. **Cons of the peso's appreciation:** a loss of purchasing power for remittances, a loss of export competitiveness, and a disincentive for foreign direct investment inflows.
- Among the top 35 countries from which the U.S. imports goods, China recorded the highest average effective tariff at 19.99%, followed by Cambodia (19.41%), Indonesia (13.40%), Turkey (12.23%), and Japan (10.49%). **Mexico ranked 29th** with an average effective tariff of 2.90%, down from the 3.40% recorded in June. The average tariff applied to Mexico is the lowest since February 2025.

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



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



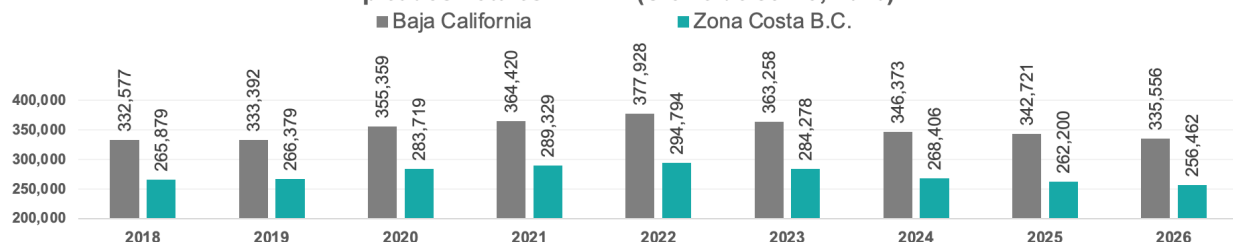
Tipo de Cambio (MXN / USD) Paridad Diaria (Valor para fecha de liquidación)



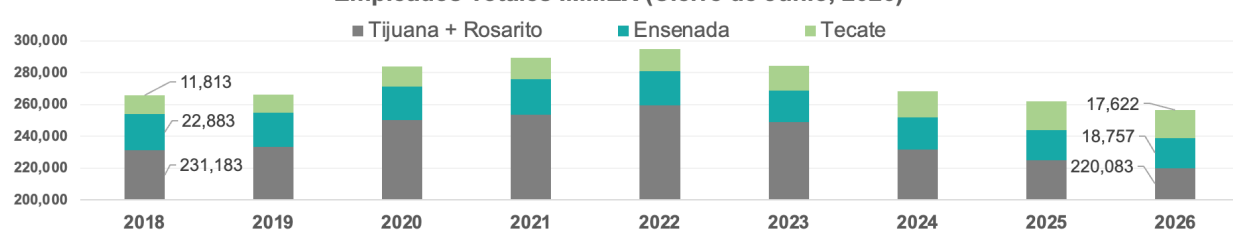
Fuentes: INEGI y Banco de México (Banxico).

Estadísticas del Mercado Laboral (1 de 2)

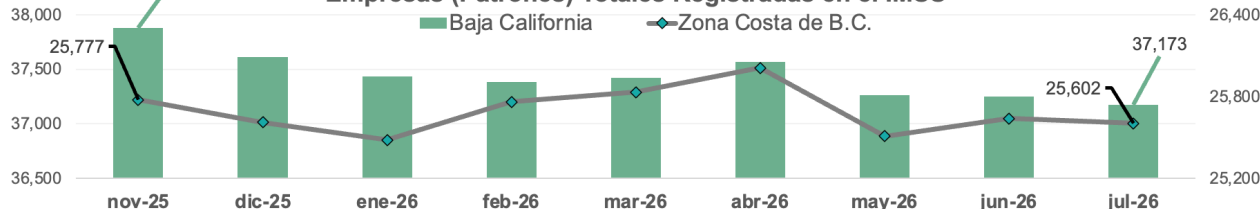
Empleados Totales IMEX (Cierre de Junio, 2026)



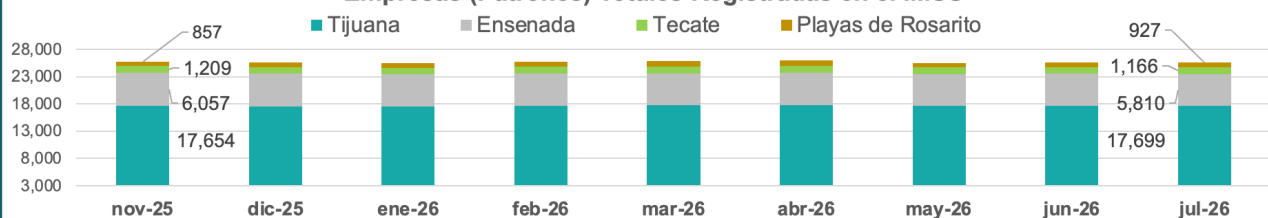
Empleados Totales IMEX (Cierre de Junio, 2026)



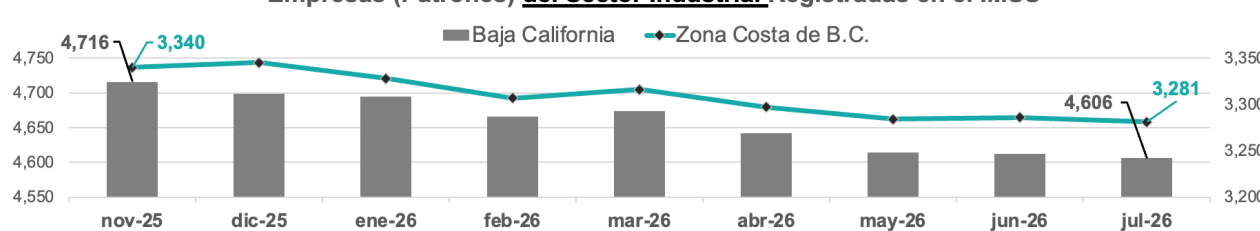
Empresas (Patrones) Totales Registradas en el IMSS



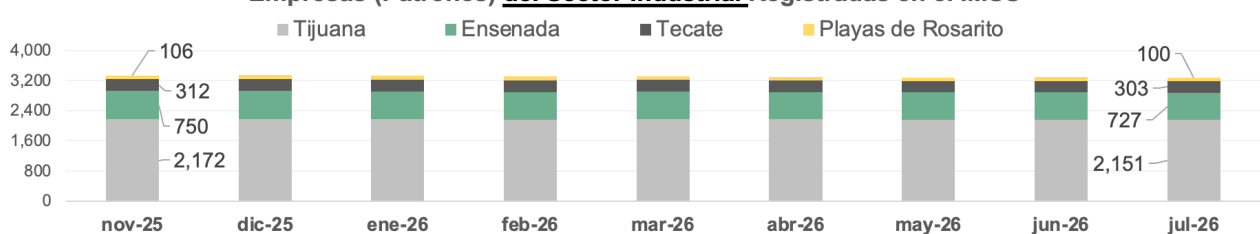
Empresas (Patrones) Totales Registradas en el IMSS



Empresas (Patrones) del Sector Industrial Registradas en el IMSS

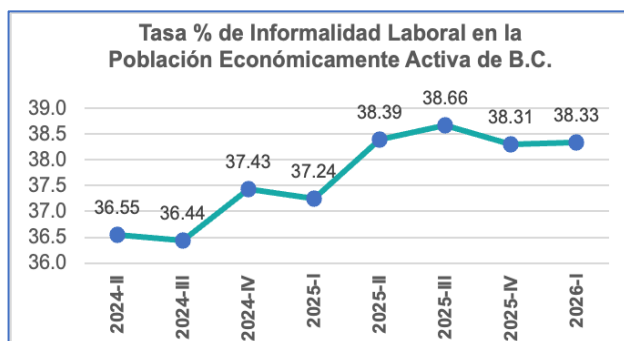
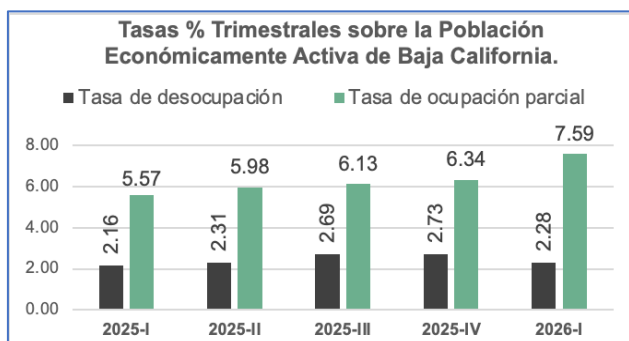
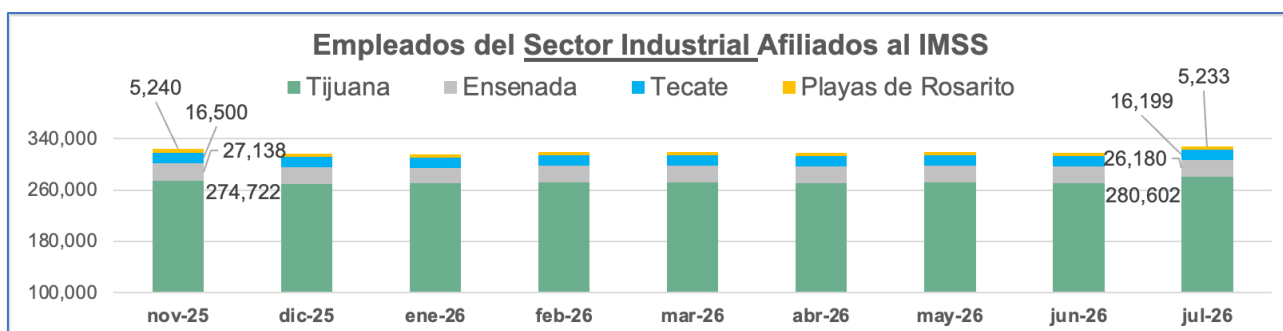
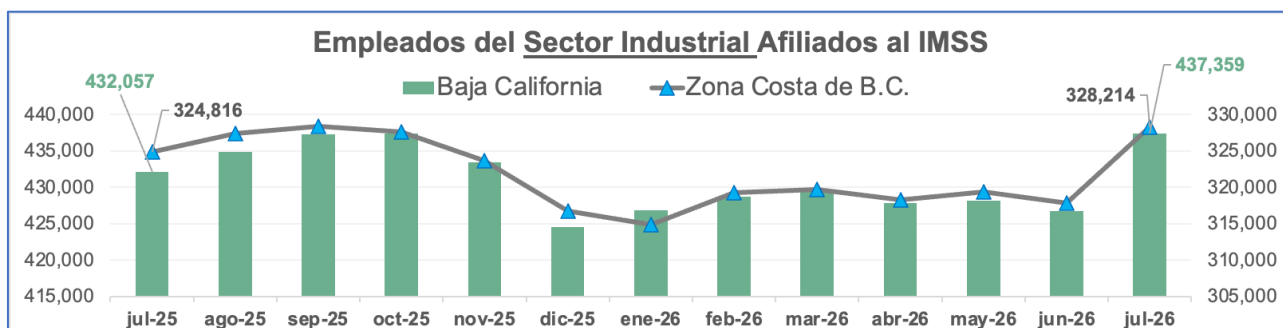
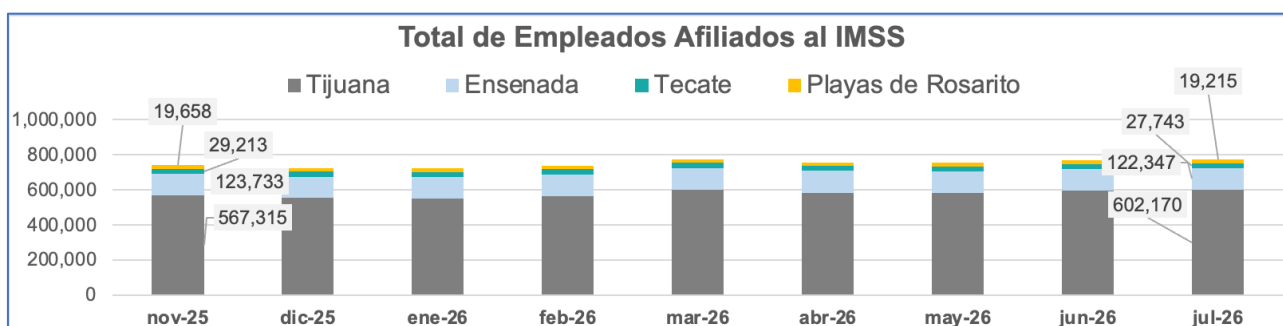
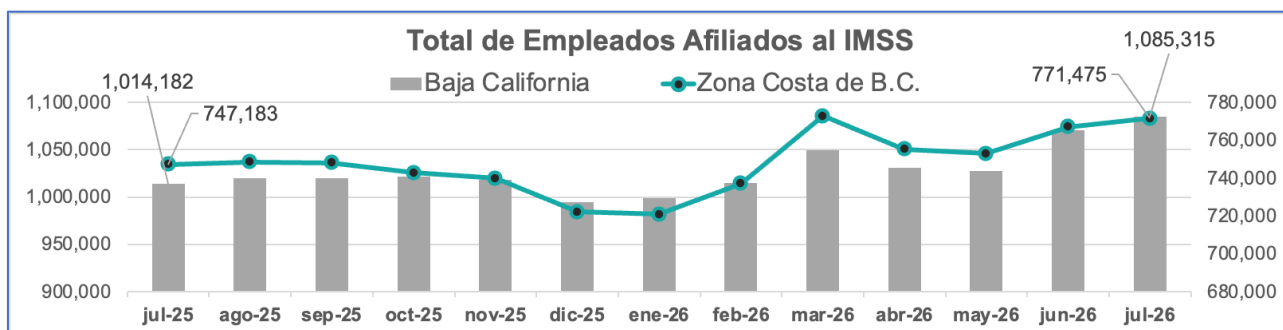


Empresas (Patrones) del Sector Industrial Registradas en el IMSS



Fuentes: INEGI e IMSS.

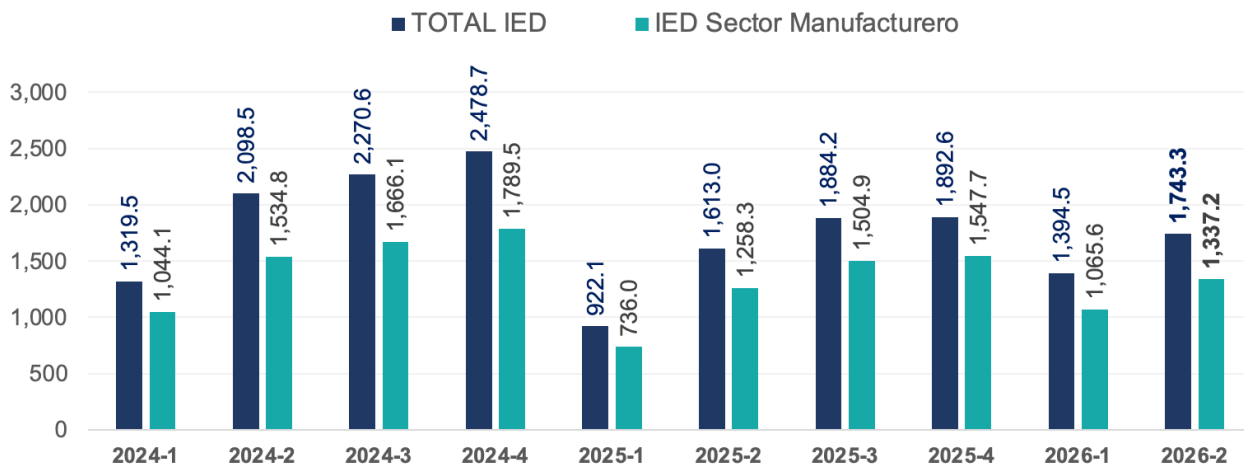
Estadísticas del Mercado Laboral (2 de 2)



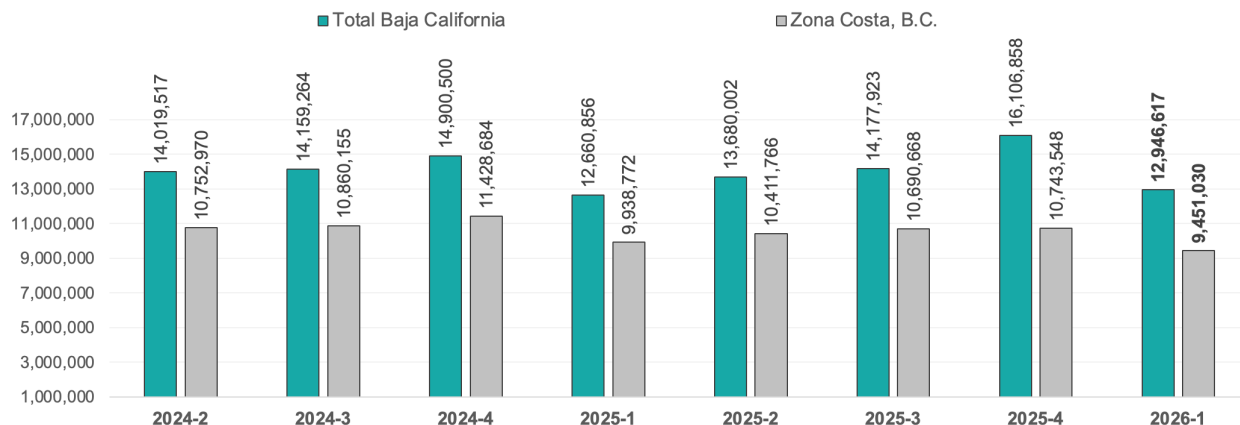
Fuentes: IMSS, INEGI y ENEO.

Estadísticas de Inversión y Comercio Exterior

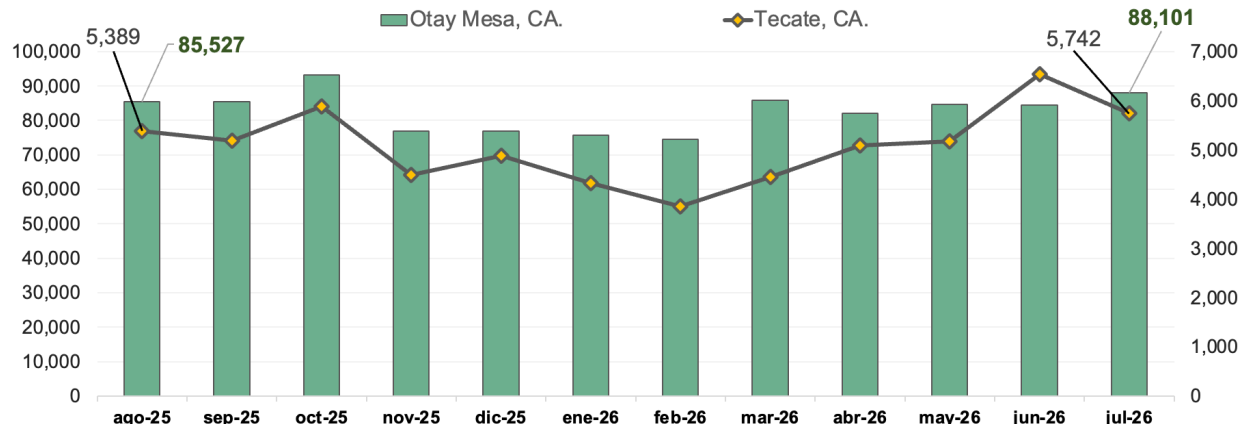
Inversión Extranjera Directa (IED) en Baja California Cifras Trimestrales en Millones de USD



Exportaciones Sector Manufacturero, Montos Trimestrales en Miles de USD



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



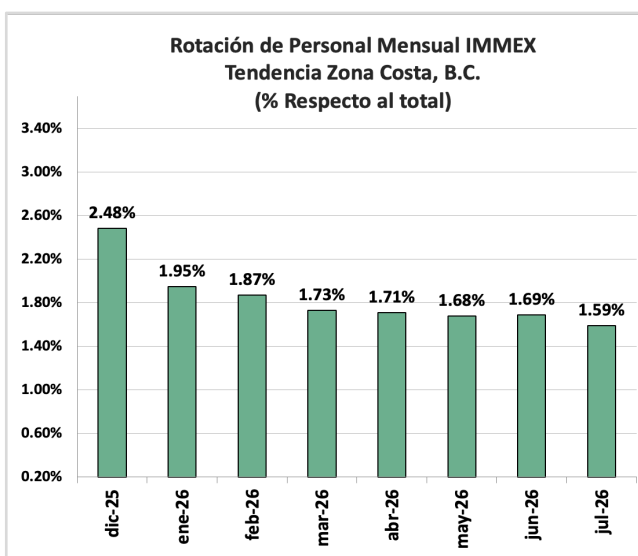
Fuentes: RNIE, SE GobMX, INEGI y GSA (Gob. EE.UU)..

Estadísticas IMMEX

ESTABLECIMIENTOS IMMEX (No. de Naves Industriales)					
INDUSTRIAL BUILDINGS WITH IMMEX PERMIT					
	2023	2024	2025	Jul-26	Tendencia
NACIONAL (MX)	12,393	12,817	12,528	12,658	▲
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	1,274	▼
ENSENADA	171	160	145	148	▲
TECATE	161	168	157	160	▲
PLAYAS DE ROSARITO	38	57	57	58	=
MEXICALI	465	489	481	480	=
FUENTE / SOURCE: SNICE (S.E.) JULIO-2026.					

PROGRAMAS IMMEX AUTORIZADOS (En Funcionamiento)					
AUTHORIZED IMMEX PROGRAMS (In Operations)					
	2023	2024	2025	Jul-26	Tendencia
NACIONAL (MX)	6,033	6,100	5,964	6,023	▲
BAJA CALIFORNIA	1,127	1,106	1,064	1,069	▲
ZONA COSTA	921	903	861	869	▲
TIJUANA	699	681	663	669	▼
TECATE	105	111	98	98	▲
ENSENADA	93	82	72	76	▲
PLAYAS DE ROSARITO	24	29	28	26	=
MEXICALI	206	203	203	200	▲
FUENTE / SOURCE: SNICE (S.E.), JULIO-2026.					

EMPLEADOS IMMEX (INEGI)					
IMMEX EMPLOYEES (INEGI)					
	2023	2024	2025	Jun-26	Tendencia
NACIONAL	2,914,332	2,892,555	2,796,849	2,818,178	▲
BAJA CALIFORNIA	363,258	346,373	342,721	335,556	▲
ZONA COSTA	284,278	268,406	262,200	256,462	▼
TIJUANA + ROSARITO	248,944	231,596	225,114	220,083	▲
ENSENADA	19,854	20,274	18,983	18,757	▲
TECATE	15,480	16,536	18,103	17,622	▼
MEXICALI	78,980	77,967	80,521	79,094	▲
FUENTE / SOURCE: INEGI, JUNIO - 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	334,277	255,255	220,029	16,470	18,756	79,022
	PRODUCCIÓN Y TÉCNICOS	293,015	225,446	194,277	14,713	16,456	67,569
	ADMINISTRATIVOS	41,262	29,809	25,752	1,757	2,300	11,453
SUBCONTRATADOS	TOTAL	1,279	1,207	54	1,152	1	72
	PRODUCCIÓN Y TÉCNICOS	598	540	53	486	1	58
	ADMINISTRATIVOS	681	667	1	666	0	14
FUENTE / SOURCE: INEGI (IMMEX PROGRAM DATABASE) JUNIO-2026.							

Estadísticas IMMEX

CONSUMO DE BIENES Y SERVICIOS IMMEX DE ORIGEN MEXICANO

CONSUMPTION OF IMMEX GOODS AND SERVICES OF MEXICAN ORIGIN.

	2023	2024	2025	jun-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	234,192,216	▼
BAJA CALIFORNIA	43,290,495	48,252,881	51,481,841	3,692,876	▼
ZONA COSTA, B.C.	17,812,477	21,064,512	26,654,013	1,944,661	▼
TIJUANA + ROSARITO	13,573,111	17,008,551	22,429,834	1,581,847	▼
TECATE	3,490,091	3,329,998	3,653,380	340,294	▼
ENSENADA	749,275	725,963	570,799	22,520	▲
MEXICALI	25,478,018	27,188,369	24,827,828	1,748,215	▲

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

CONSUMO DE BIENES Y SERVICIOS IMMEX DE ORIGEN EXTRANJERO

CONSUMPTION OF IMMEX GOODS AND SERVICES OF FOREIGN ORIGIN.

	2023	2024	2025	jun-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	390,365,328	▲
BAJA CALIFORNIA	325,554,892	341,001,167	390,972,951	33,187,410	▼
ZONA COSTA, B.C.	261,041,714	272,346,014	205,037,321	26,964,840	▲
TIJUANA + ROSARITO	239,092,867	201,492,211	13,675,546	16,752,193	▲
TECATE	10,893,616	59,368,626	75,354,903	9,008,113	▼
ENSENADA	11,055,231	11,485,177	116,006,872	1,204,534	▼
MEXICALI	64,513,181	68,655,147	185,935,630	6,222,570	▼

FUENTE / SOURCE: INEGI (IMMEX PROGRAM DATABASE) JUNIO-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	jun-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	449,941,879	▼
BAJA CALIFORNIA	634,033,156	688,262,458	748,143,240	58,010,606	▲
ZONA COSTA, B.C.	508,435,298	554,064,695	597,541,154	46,588,822	▲
TIJUANA + ROSARITO	472,283,938	491,527,056	492,956,801	36,519,482	▲
TECATE	15,342,119	41,016,543	103,890,161	8,687,508	▲
ENSENADA	20,809,241	21,521,096	694,192	1,381,832	▼
MEXICALI	125,597,858	134,196,763	130,009,470	11,421,784	▲

FUENTE / SOURCE: INEGI (IMMEX PROGRAM DATABASE) JUNIO 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	jun-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	189,199,430	▲
BAJA CALIFORNIA	23,145,798	20,025,151	20,878,562	1,631,494	▲
ZONA COSTA, B.C.	11,264,128	9,771,345	10,243,075	828,223	▲
TIJUANA + ROSARITO	9,412,866	8,616,185	9,103,237	720,395	▲
TECATE	512,815	344,583	445,646	59,675	▲
ENSENADA	1,338,447	810,577	694,192	48,153	▼
MEXICALI	11,881,670	10,253,806	10,635,487	803,271	▼

FUENTE / SOURCE: INEGI (IMMEX PROGRAM DATABASE) JUNIO-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	jun-26	Tendencia
NACIONAL	749,416,323	888,020,175	983,342,239	81,341,514	▲
BAJA CALIFORNIA	78,362,077	90,834,272	98,758,147	8,190,423	▲
ZONA COSTA, B.C.	54,744,873	62,523,110	67,672,206	5,477,694	▲
TIJUANA + ROSARITO	48,524,183	50,887,356	52,469,858	4,359,734	▲
TECATE	2,909,698	8,319,919	11,884,095	846,096	▲
ENSENADA	3,310,992	3,315,835	3,318,253	271,864	▲
MEXICALI	23,617,204	28,317,162	31,085,941	2,712,729	▲

FUENTE / SOURCE: INEGI (IMMEX PROGRAM DATABASE) JUNIO-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)