

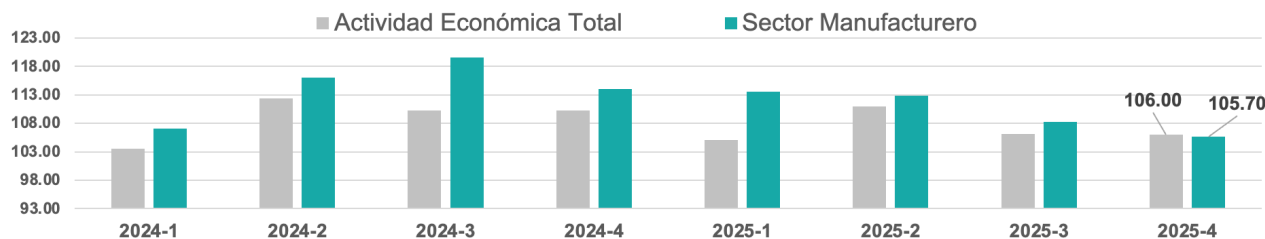
Análisis de coyuntura

- De 1993 a 2025, el consumo privado de México mostró en promedio un crecimiento mensual de 0.10% en mayo. Excluyendo los años de recesión (1995, 2001, 2009 y 2020) el promedio de crecimiento es de 0.31%. Para mayo de este año el INEGI estimó una caída de 0.02%.
- En el primer trimestre, en México, la formación bruta de capital fijo representó el 21.85% del PIB, su menor proporción desde el tercer trimestre de 2022, la menor desde 2022. Respecto al primer trimestre del año pasado, muestra una disminución de 0.84 pp. La caída en los últimos dos años ha sido a un ritmo de 1.18% por año, muy por encima las caídas anteriores, con excepción de la crisis de 1995, cuando cayó solo en ese año.

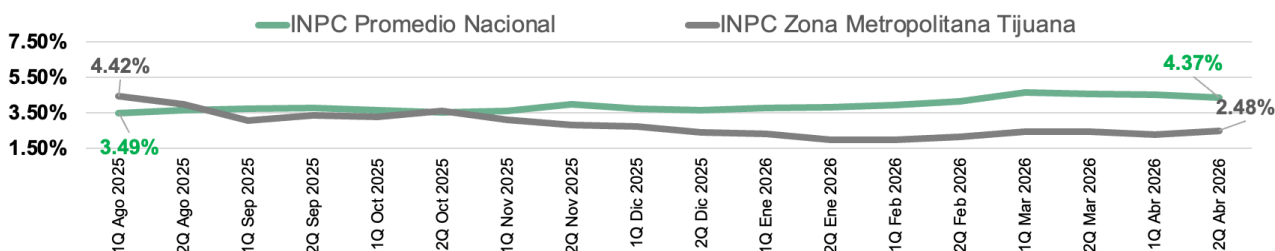
Situational analysis

- From 1993 to 2025, Mexico's private consumption showed an average monthly growth of 0.10% in May. Excluding the recession years (1995, 2001, 2009, and 2020), the average growth is 0.31%. For May of this year, INEGI estimated a decrease of 0.02%.
- In the first quarter, gross fixed capital formation in Mexico represented 21.85% of GDP, its lowest proportion since the third quarter of 2022. Compared to the first quarter of last year, it shows a decrease of 0.84 percentage points. The decline over the last two years has been at an annual rate of 1.18%, significantly higher than previous declines, with the exception of the 1995 crisis, when it fell only in that year.

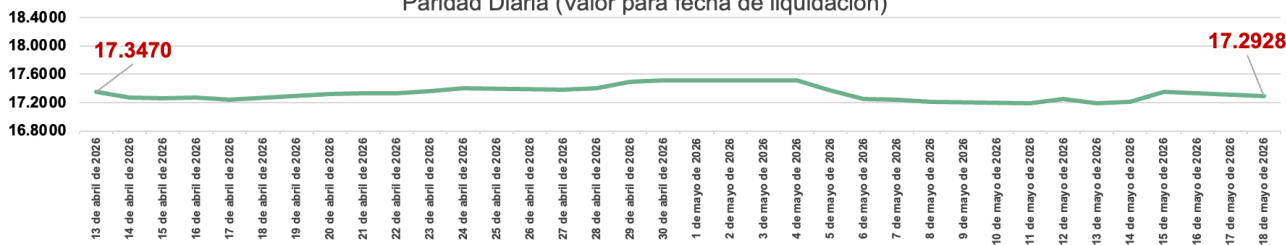
Indicador Trimestral de la Actividad Económica Estatal (ITAEE) (Base 2018=100) Índices para Baja California



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

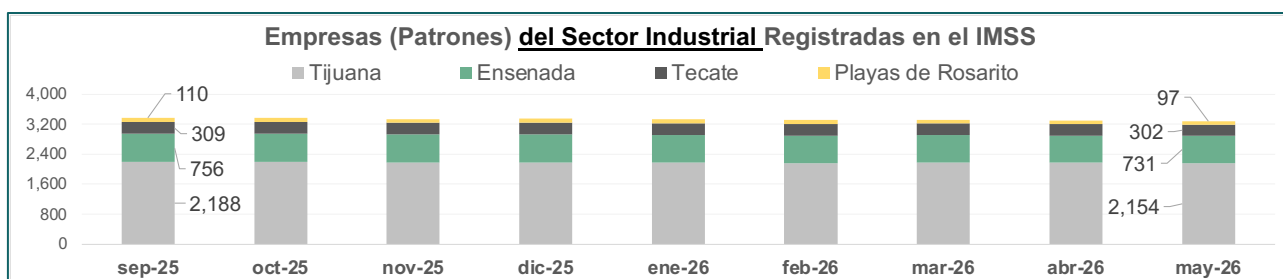
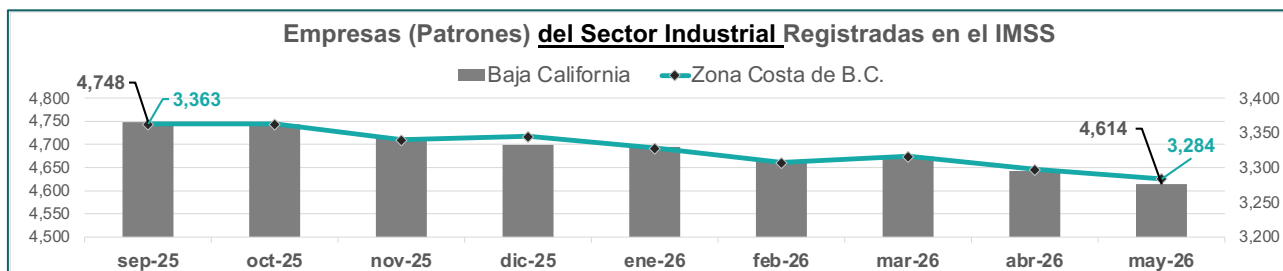
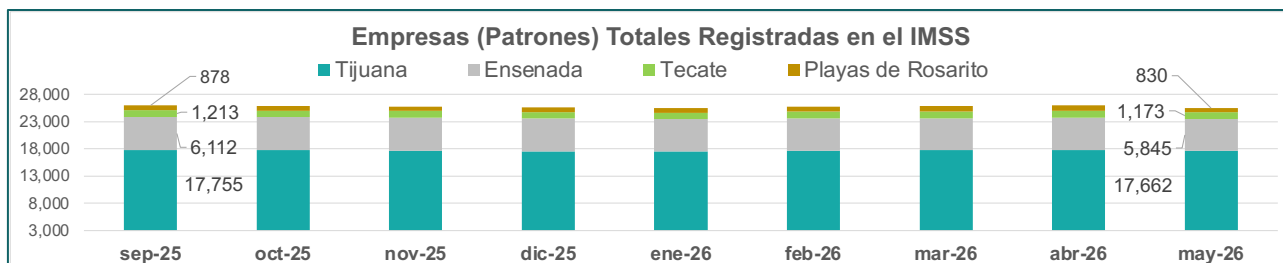
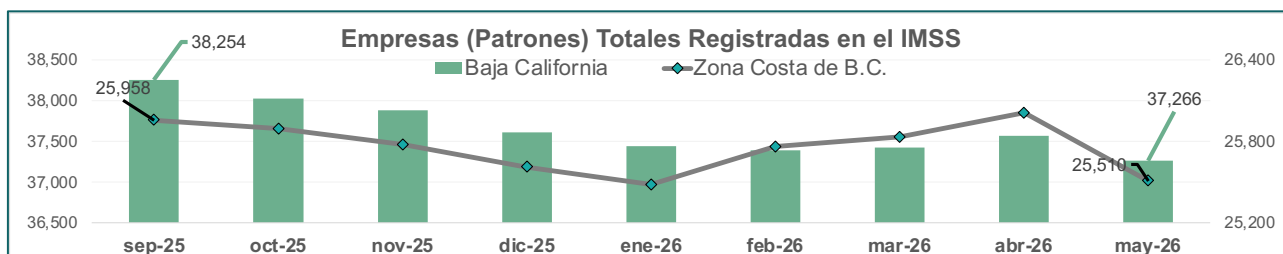
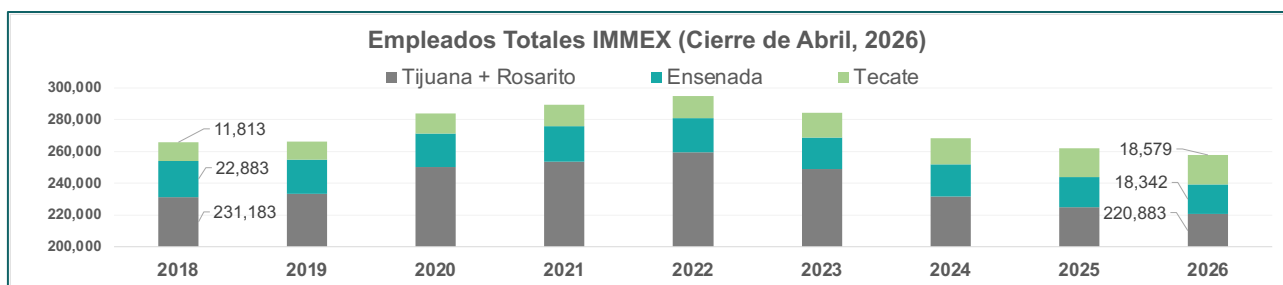
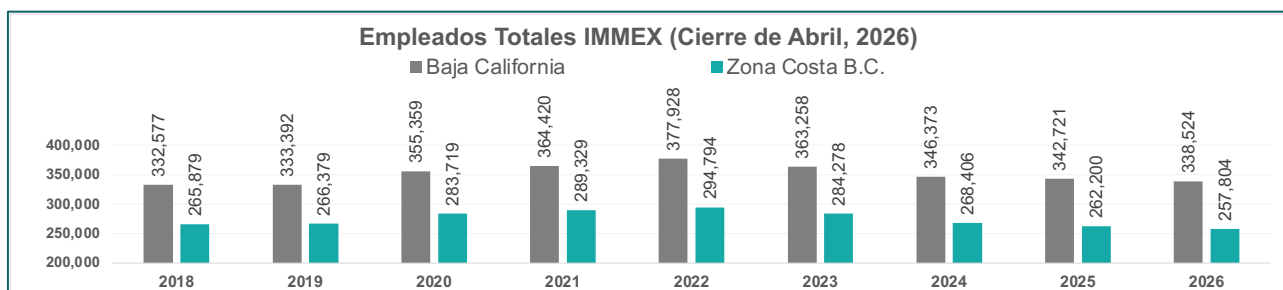


Tipo de Cambio (MXN / USD) Paridad Diaria (Valor para fecha de liquidación)



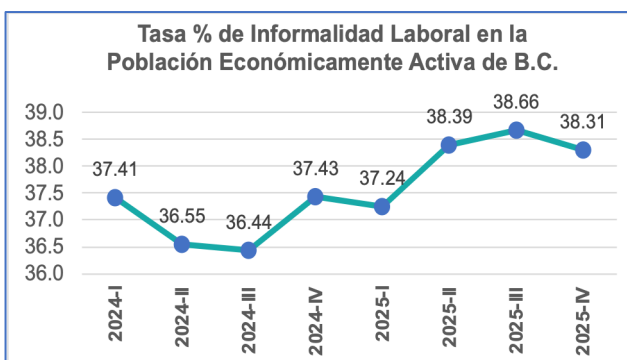
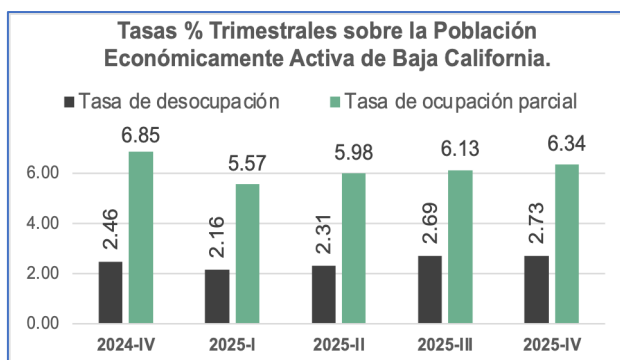
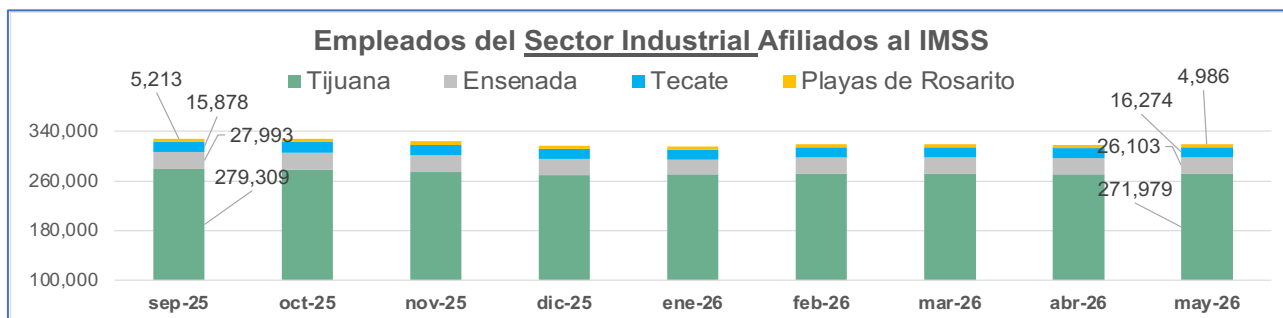
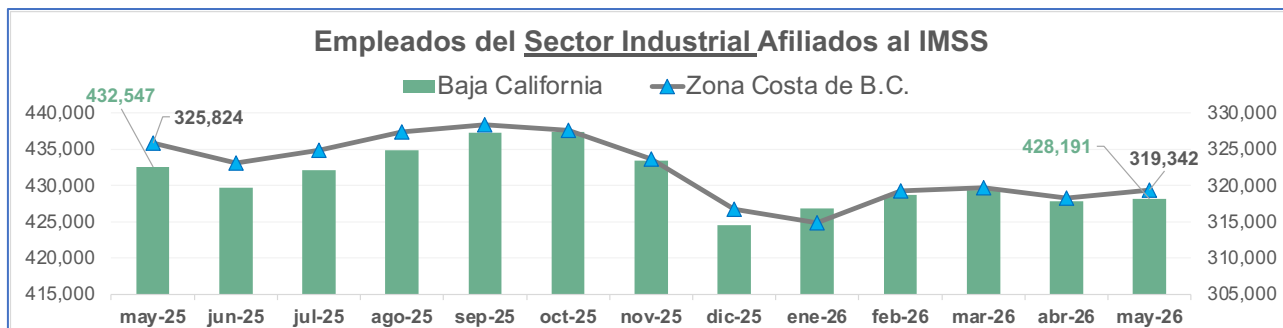
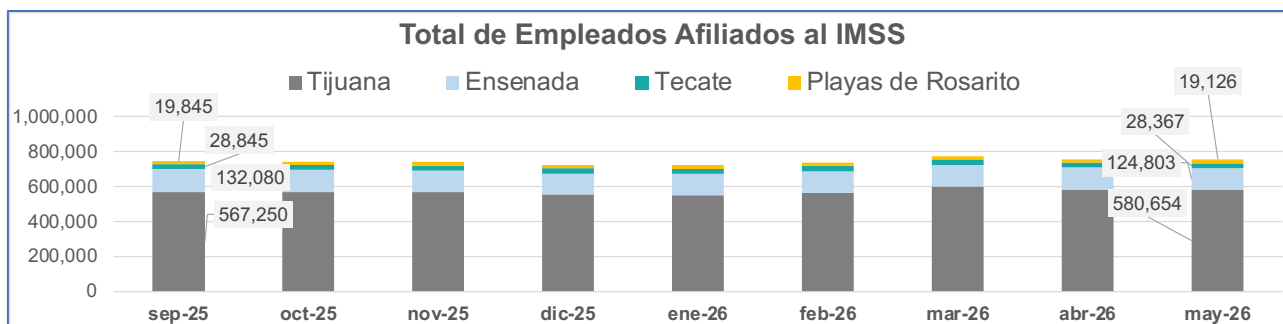
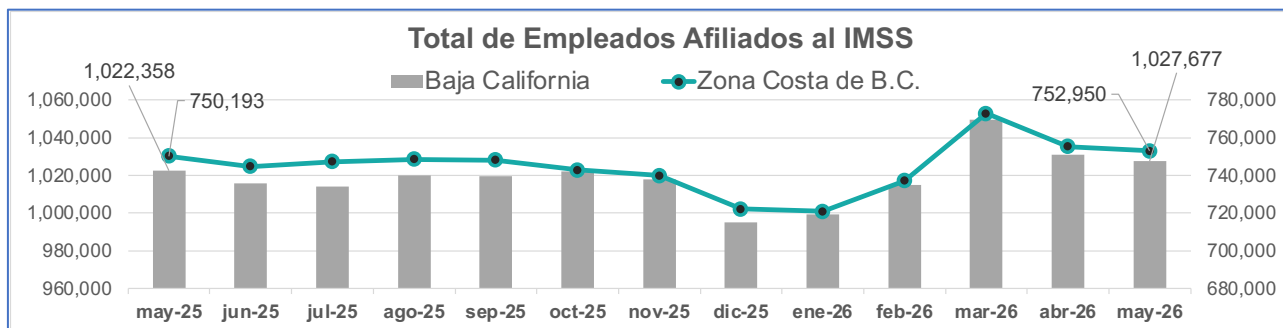
Fuentes: INEGI y Banco de México (Banxico).

Estadísticas del Mercado Laboral (1 de 2)



Fuentes: INEGI e IMSS.

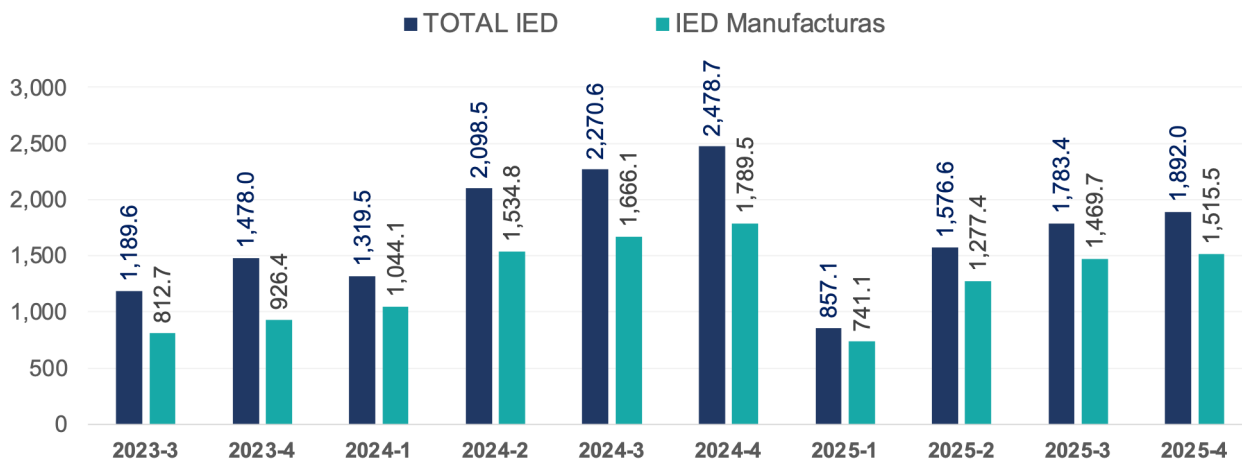
Estadísticas del Mercado Laboral (2 de 2)



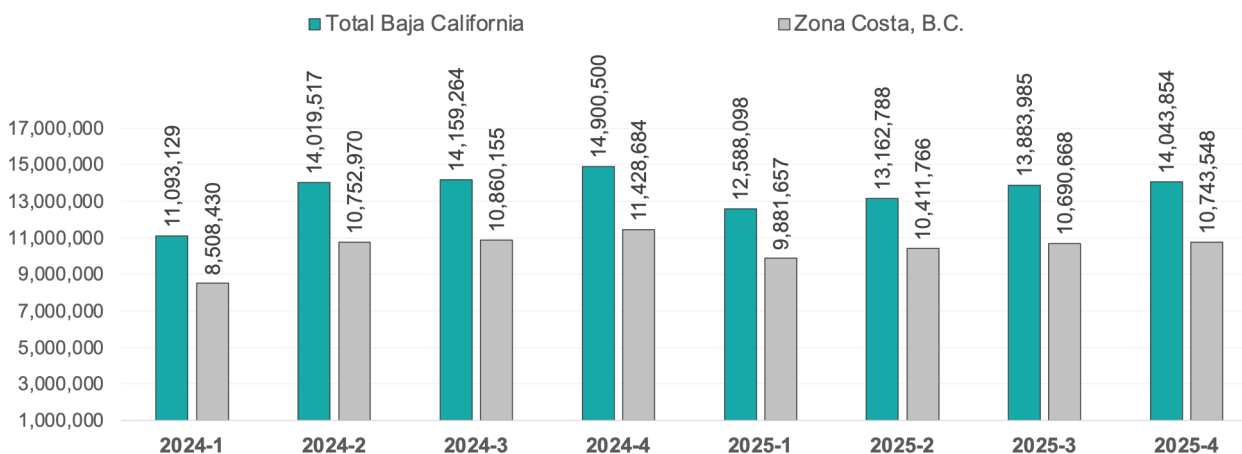
Fuentes: IMSS, INEGI y ENOE.

Estadísticas de Inversión y Comercio Exterior

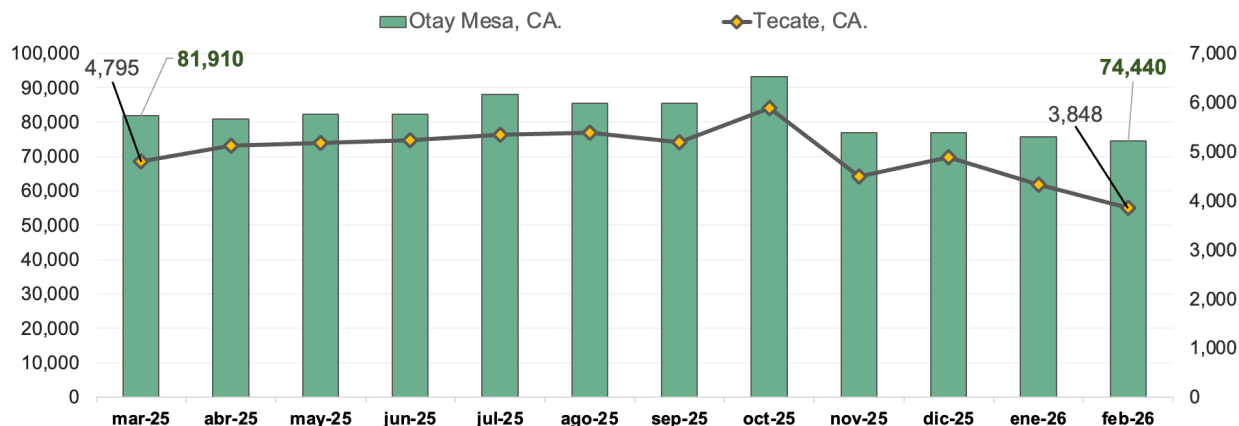
Inversión Extranjera Directa (IED) en Baja California Cifras Trimestrales en Millones de USD



Exportaciones Sector Manufacturero, Montos Trimestrales en Miles de USD



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



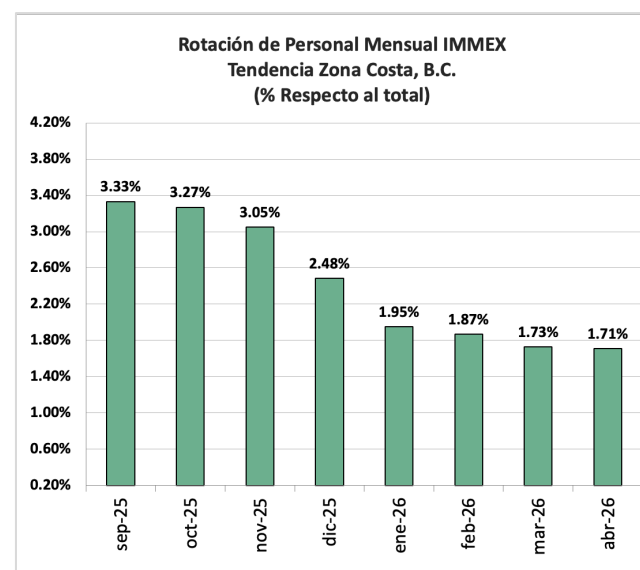
Fuentes: RNIE, SE GobMX, INEGI y GSA (Gob. EE.UU.).

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	Mar-26	Tendencia
NACIONAL	2,914,332	2,892,555	2,796,849	2,796,738	▼
BAJA CALIFORNIA	363,258	346,373	342,721	337,823	▼
ZONA COSTA	284,278	268,406	262,200	259,203	▼
TIJUANA + ROSARITO	248,944	231,596	225,114	222,707	▼
ENSENADA	19,854	20,274	18,983	18,693	▼
TECATE	15,480	16,536	18,103	17,803	▼
MEXICALI	78,980	77,967	80,521	78,620	▼
FUENTE / SOURCE: INEGI, MARZO - 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	336,381	257,833	222,530	16,611	18,692	78,548
	PRODUCCIÓN Y TÉCNICOS	295,363	228,309	197,081	14,824	16,404	67,054
	ADMINISTRATIVOS	41,018	29,524	25,449	1,787	2,288	11,494
SUBCONTRATADOS	TOTAL	1,442	1,370	177	1,192	1	72
	PRODUCCIÓN Y TÉCNICOS	671	613	109	503	1	58
	ADMINISTRATIVOS	771	757	68	689	0	14
FUENTE / SOURCE: INEGI (IMMEX PROGRAM DATABASE) MARZO-2026.							

Estadísticas IMMEX

CONSUMO DE BIENES Y SERVICIOS IMMEX DE ORIGEN MEXICANO					
CONSUMPTION OF IMMEX GOODS AND SERVICES OF MEXICAN ORIGIN.					
	2023	2024	2025	mar-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	241,517,101	▲
BAJA CALIFORNIA	43,290,495	48,252,881	51,481,841	4,804,951	▲
ZONA COSTA, B.C.	17,812,477	21,064,512	26,654,013	2,362,596	▲
TIJUANA + ROSARITO	13,573,111	17,008,551	22,429,834	1,941,273	▲
TECATE	3,490,091	3,329,998	3,653,380	389,274	▲
ENSENADA	749,275	725,963	570,799	32,049	▼
MEXICALI	25,478,018	27,188,369	24,827,828	2,442,355	▲
FUENTE / SOURCE: INEGI (IMMEX PROGRAM DATABASE) MARZO-2026					

CONSUMO DE BIENES Y SERVICIOS IMMEX DE ORIGEN EXTRANJERO					
CONSUMPTION OF IMMEX GOODS AND SERVICES OF FOREIGN ORIGIN.					
	2023	2024	2025	mar-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	387,365,791	▲
BAJA CALIFORNIA	325,554,892	341,001,167	390,972,951	32,279,394	▲
ZONA COSTA, B.C.	261,041,714	272,346,014	205,037,321	25,517,586	▲
TIJUANA + ROSARITO	239,092,867	201,492,211	13,675,546	15,560,366	▲
TECATE	10,893,616	59,368,626	75,354,903	8,681,483	▲
ENSENADA	11,055,231	11,485,177	116,006,872	1,275,737	▲
MEXICALI	64,513,181	68,655,147	185,935,630	6,761,808	▲
FUENTE / SOURCE: INEGI (IMMEX PROGRAM DATABASE) MARZO-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	mar-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	444,098,175	▲
BAJA CALIFORNIA	634,033,156	688,262,458	748,143,240	56,881,680	▲
ZONA COSTA, B.C.	508,435,298	554,064,695	597,541,154	43,188,604	▲
TIJUANA + ROSARITO	472,283,938	491,527,056	492,956,801	32,575,521	▲
TECATE	15,342,119	41,016,543	103,890,161	8,866,091	▲
ENSENADA	20,809,241	21,521,096	694,192	1,746,992	▼
MEXICALI	125,597,858	134,196,763	130,009,470	13,693,076	▲
FUENTE / SOURCE: INEGI (IMMEX PROGRAM DATABASE) MARZO 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	mar-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	184,437,833	▲
BAJA CALIFORNIA	23,145,798	20,025,151	20,878,562	1,736,658	▲
ZONA COSTA, B.C.	11,264,128	9,771,345	10,243,075	739,897	▲
TIJUANA + ROSARITO	9,412,866	8,616,185	9,103,237	634,588	▲
TECATE	512,815	344,583	445,646	49,114	▲
ENSENADA	1,338,447	810,577	694,192	56,195	▲
MEXICALI	11,881,670	10,253,806	10,635,487	996,760	▲
FUENTE / SOURCE: INEGI (IMMEX PROGRAM DATABASE) MARZO-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	mar-26	Tendencia
NACIONAL	749,416,323	888,020,175	983,342,239	77,505,297	▲
BAJA CALIFORNIA	78,362,077	90,834,272	98,758,147	7,674,409	▲
ZONA COSTA, B.C.	54,744,873	62,523,110	67,672,206	5,110,704	▲
TIJUANA + ROSARITO	48,524,183	50,887,356	52,469,858	4,002,118	▼
TECATE	2,909,698	8,319,919	11,884,095	816,201	▲
ENSENADA	3,310,992	3,315,835	3,318,253	292,385	▲
MEXICALI	23,617,204	28,317,162	31,085,941	2,563,705	▲

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