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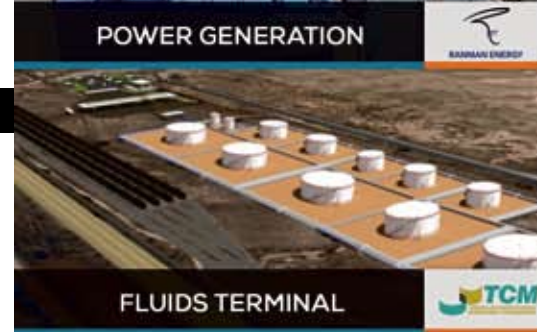
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San Luis Potosi, Mexico

# INDUSTRIAL PARKS IN

# EVOLUTION



FOR A DECADE, INDUSTRIAL PARKS IN MEXICO HAVE CEASED TO BE LAND WITH BASIC INFRASTRUCTURE TO TRANSFORM THEMSELVES INTO DEVELOPMENTS THAT HAVE INTEGRATED VALUE PROPOSITIONS AIMED TO SATISFY THE REQUIREMENTS OF DOMESTIC AND FOREIGN COMPANIES, FROM SUSTAINABLE ALTERNATIVES THAT HELP TO REDUCE OPERATING COSTS AND SERVICES WHICH HAVE CONTRIBUTED TO INCREASE THE LOYALTY AND PRODUCTIVITY OF THE EMPLOYEES.



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- **FLOORS.** 17 cm of thickness, concrete MR38 with metal fiber.
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**T**he industrial parks developed in Mexico have a new face. Today the golden rule of the developers and real estate managers is to leave behind the traditional schemes to offer industrial complexes with global specifications in both construction and services.

“From about ten years till now, industrial parks built in Mexico are of the same quality that you can find in Germany, France or the United States, they are industrial parks with global specifications both in construction and in the required geometries, I mean the width of the streets, courtyards, to the heights of the industrial buildings, to the systems against fire. I have visited countries with many industrial parks and those of Mexico are at the level of the best, so we have investors from different parts of the world, because they know that the standards here are global,” is the opinion of Gerardo Ramírez, National director of JLL Industrial.

He emphasizes that industrial parks are a private capital infrastructure that will grow at a rate of two or three percent in the coming years. “We have the great advantage that in the next 15 years we will generate our own internal consumption and that will keep us growing, so industrial parks will continue to grow at least at the rate of approximately two percent in the whole Mexican Republic.”

For Sergio Argüelles González, president and general director of FINSA, the industrial parks will continue their evolution towards areas of welfare generation for the communities, both for their economic impact and for their environmental and social footprint.

It must be highlighted that FINSA introduced the first industrial park in 1993, which was dedicated to the automotive industry in Mexico, hand in hand with Volkswagen. “This concept allows suppliers in the automotive industry to operate under the ‘just in time’ and ‘just in sequence’ programs, which result in significant savings in operation time, as well as reduced inventories and packaging costs, to mention some benefits. The concept is replicated later in other locations such as Ramos Arizpe, for General Motors; in Aguascalientes for Nissan, Daimler and Infiniti, and more recently with a second dedicated industrial park in the state of Puebla, for AUDI,” says the president of FINSA.

Lyman Daniels, president of CBRE Mexico, declares that foreign investors that arrive to the country’s industrial parks already know what to expect. “The majority of important clients recognize that Mexico has registered a significant evolution of space, of modernization, of type of

“**The automotive and aerospace sectors are creating a big industry in the Bajío, from Querétaro, Celaya and Irapuato to the north in San Luis Potosí, Zacatecas and Aguascalientes, the number of operations there is impressive.**  
Rubén Imán,  
general director  
of ONEST Logistics.

”

industrial warehouses that we have here and that compares perfectly with the same product that is in the United States or Europe. There are very important developers here in the country that develop in other parts of the world, who handle the same standards here, for example, the height of the ceilings, the size of the doors, the distance between columns, then you apply it another market and have the same success.”

He also indicates that today, 34 percent of users of industrial parks are linked to the automotive sector and 31 percent to logistics. “For example, those who deliver goods in Mexico City and the warehouses are outside, but by region, the north and the Bajío have their specialty.”



Photo: CBRE

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FINSA Guadalupe, Nuevo León, Mexico.

“The industrial parks will continue their evolution towards spaces of generation of well-being for the communities, as much for its economic impact as for its environmental and social footprint.

Sergio Argüelles González, president and general director of FINSA.

”

## NORTH, CENTRAL AND BAJÍO: INDUSTRIAL REGIONS

The president of CBRE Mexico reports that the state with the largest industrial space is Nuevo León, specifically its capital, Monterrey, with almost nine million square meters. Nevertheless, he comments that the Bajío in general is growing, that is to say, the states of San Luis Potosí, Aguascalientes, Guanajuato and Querétaro. “The Bajío is a market that has grown faster than the others but Monterrey has been a monster since before and will continue to be important. Our projection will continue growing, perhaps not as fast as before but it will continue to grow.”

In markets like San Luis Potosí, current average incomes are the lowest, informs Daniels. “It’s a market that is consuming faster and has little inventory. The market in Puebla, which is more specialized, has also grown a lot, it has a high percentage unoccupied. In San Luis Potosí the average is three dollars with 65 cents per square meter of average rent. Puebla is three dollars with 80 cents. These prices are not bad compared with those of Mexico City, where the average is five dollars with 10 cents. A little more than a dollar difference or a little over 24 percent difference is not such a critical range. My point of view, is that there is a constant demand and that the demand for industrial space in the country is still very healthy.”

He says that most users rent, which has become a key trend. “I don’t see a drastic change because many coming companies do not want to have changes in their accounting rules, they do not want assets in books that are not supporting production. Therefore, rent is an expense that it is sometimes much more appropriate.”

Gerardo Ramírez explains that in JLL Industrial they have identified three industrial zones in Mexico. “We have three regions that we study because they differ by product. First is the northern zone, which is the region that is bordered by the United States, our main commercial partner, and there is something very typical there which is the maquiladora industry. Then there is the central region where Mexico City, Puebla and Toluca, are aimed to serve a population of 25 million inhabitants. The third is the Bajío zone, which has been in vogue for the last seven years, because there has arrived several companies related to the automotive, aerospace, food and agroindustrial industries.”

He states that in the Bajío has registered the greatest demand for industrial space, especially as suppliers continue to come from the automotive sector. “I think it’s about four years to keep them coming, so there’s an increase in demand in that zone. In Querétaro you can find Toyota and Bombardier, then they are still needing suppliers, which means that in the last five years more than 20 industrial parks have appeared in that zone.”

The National Director of JLL Industrial emphasizes that in the Bajío the customers of the industrial parks basically are Asian, besides they prefer to buy that to rent because that it is their business model. “There is a lot of land sales and a lot of key industrial warehouses sales in hand or built to suit industrial warehouses.”

He points out that in 2016 there was an increase in the stock of industrial warehouses of around 5.7

million square meters, which represented an increase of 8.3 percent compared to 2015, which he defines as an increase higher than Mexico’s growing, that is to say, at rates of two per cent on average.

The general director of FINSA states that the cost of land depends on its availability in the market, and, of course, the demand. “In markets that are mature, higher costs prevail, while other markets that are growing can find good opportunities in terms of cost of land and incentives.”

He declares that the states of the country that are most attractive for the development and investment of industrial parks are located in the northwest, Chihuahua and Baja California; northeast, Coahuila and Nuevo León; Bajío, Guanajuato, Querétaro, Aguascalientes; and in the center, State of Mexico and Puebla.

Besides, he informs that the characteristics most sought by companies of industrial parks are location, certainty in the supply of infrastructure -electricity, water, among others- connectivity, access to labor, expansion capacity, security and supply of services of value-added.

For Rubén Imán, general director of ONEST Logistics, the most important area of the country is the Bajío, since it coincides that the automotive and aerospace sectors are creating a great industry, from Querétaro to Zacatecas. “The number of operations there is impressive. With the opening of the Bajío, from the automotive and aerospace, an economic town was created, so today there is a very important new center of consumption, with a very high purchasing power in that area. And Monterrey will remain an industrial and high-trade place. Guadalajara as always has also been very commercial. In Mexico City, the heart of the country, about 30 percent of sales are carried out, while in the surrounding areas, from 0 to 400 kilometers, 60 percent of sales are generated, including the Bajío, where is Guanajuato, Michoacán, Querétaro, Aguascalientes and San Luis Potosí. Querétaro is more technological, there are

“From about ten years till now, industrial parks built in Mexico are of the same quality that you can find in Germany, France or the United States, they are industrial parks with global specifications both in construction and in geometries.

Gerardo Ramírez,  
National director  
of Industrial JLL.

”

“The majority of clients recognizes that Mexico has registered an important evolution in industrial space, of modernization, of types of industrial warehouses, that we have here, that perfectly compares and knows is the same product that United States or Europe have. There are very important developers in the country that develops in other parts of the world, and manage the same standards.

Lyman Daniels, president of CBRE Mexico.

”

many people trained to work in the plants, so there are many who have the knowledge of how to find technical jobs very well paid in the automotive manufacturers.”

He concludes that “Mexico is living a very interesting moment to come here, the methods are already proven, we are the eleventh economy of the world, with some problems but the country is going forward again. It’s a good time for any Japanese economy or whatever it is to establish in the country.”

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# JAPANESE TRADITION

IN AGUASCALIENTES

"Aguascalientes is undoubtedly a State with a recognized production capacity and human talent for the development and growth of the automotive market, being characterized for important attractions and competitive advantages that includes the excellent performance and production system which Nissan already has in Aguascalientes, highly skilled labor; geographical location in the center of the country which grants a strategic position towards the border and maritime ports facilitating access to the import and export market; excellent communication routes -roads and rails networks- that keep the connection with the rest of the country; access to high quality supplies and an attractive economic infrastructure for investors," says Herman Morfin, director of Corporate Communications, Nissan Mexicana.

Following the kick off of A2 plant production, Nissan together with Vesta -a company dedicated to industrial real estate development- established a providers park called Douki Seisan Park, located in the manufacturing complex of the Japanese brand in Mexico, Nissan Aguascalientes Plant A2, with the purpose of integrating a solid providers base in the region.

Douki Seisan Park has five buildings operated by POSCO, MAPC, TACHI-s and Sanoh, among others, and where more than 790 direct employees work today.

Besides, last year the Nissan University was created, the first corporate university in the automotive sector in Mexico based in Aguascalientes that "seeks to raise



FOR MORE THAN THREE DECADES, NISSAN HAS CONTRIBUTED TO THE ECONOMIC AND INDUSTRIAL DEVELOPMENT OF THE STATE OF AGUASCALIENTES. IT WAS 1982 WHEN THE NISSAN A1 AND NISSAN A2 PLANT WAS INAUGURATED IN 2013, AND IN A SHORT TIME THEY HAD CONSOLIDATED AS THE MOST IMPORTANT MANUFACTURING COMPLEXES IN MEXICO, WITH A CUMULATIVE PRODUCTION OF 562,080 UNITS IN FISCAL YEAR 2016. BOTH PLANTS, IN A SAME LINE TODAY PRODUCES A VEHICLE EVERY 34 SECONDS, INCLUDING SOME OF THE MOST POPULAR VEHICLES IN THE COUNTRY.

the level of formal education and officially validate the skills of the company's employees, enhancing their competitiveness. The first generation will conclude by the end of this year a program of studies at the level of University Technical Superior in Maintenance, directed especially for the manufacture personnel of Nissan in Mexico and with 70 percent of real practices in the plant," comments Herman Morfin.

## Nissan Mexicana in Aguascalientes

**562,080 VEHICLES**  
were produced at A1 and A2 plants in  
Aguascalientes during fiscal year 2016.

**1 VEHICLE EVERY 34 SECONDS**  
is produced at Nissan's A1 and A2 plants.

**2016 IS THE YEAR**  
in which the Nissan University  
was born in Aguascalientes.

**8,000 DIRECT JOBS** generated  
by Nissan Mexicana in Aguascalientes.

Source: Nissan Mexicana.

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# FROM SLOVENIA TO MEXICO

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The Industrial City of Xicoténcatl III (CIX) located in the State of Tlaxcala adjoins the States of Puebla, Hidalgo and the State of Mexico, which are the main centers of consumption and raw materials in the country; it is also close to the port of Veracruz, the most important for import and export movements. Also, its road network allows a fast movement of merchandise.

It is the CIX III where TBP decided to settle to be close to its customers Audi and Volkswagen. "The opportunity offered by these industrial parks has no comparison, the great accessibility speaking of communication and transportation allows us to be interconnected with our customers and thus ensure a dynamic and positive business, any company that wishes to invest outside its country of origin must turn to see Mexico as the best option," says Danijel Mursec, TBP CEO.

He also highlights that "each foreign company positioned in Mexico shows that the country is the perfect place to invest, with mutual collaboration between companies. And it is not surprising that a global acceptance is generated that increasingly allows foreign companies to come to Mexico."

## BOWDEN CABLES FOR AUDI AND VOLKSWAGEN

The TBP CEO indicates that the main idea when founding the company TBP was to have a strategic place close to serve its customers in a timely manner. "In the same way, the Government of the State of Tlaxcala facilitated that our headquarters outside Industrial City Xicoténcatl III. Over time we realized of the great workforce that lies in this place, so we could not choose a better place. Our main customers are the german assembly plants VW and Audi, but we also work hand in hand with other suppliers and companies in the automotive industry, such as HBPO, Fujikura, Alpha Industries and soon with the german company Brose."

Tovarna Bordenov in Plastike manufactures six different

Bowden cables for the Audi Q5 van; however, the diversity of its production system allows it to produce Bowden cables for different brands and for a range of functions, either for door system or for the mechanism for car's hood, it all depends on the requirements of the client.

The company TBP was born in the 60's, although in Europe, around 1902, Bowden cables were already in use, created for the automotive industry by the Irishman Ernest Monnington Bowden, hence the name; the first patent was registered in 1896. In this context the company TBP has accomplished to diversify Bowden cables and has extended its scope of application.

[www.tbp.si/en](http://www.tbp.si/en)

# GERMAN INVESTMENT

Stories of success

IN SILAO

IT IS IN SILAO, IN GUANAJUATO PUERTO INTERIOR, AND IS THE LARGEST IN AMERICA AND THE THIRD OF THE FIRM BEHIND THOSE OPERATING IN GERMANY AND CHINA. THIS IS THE PRODUCTION CENTER OF BEIERSDORF MANUFACTURING MEXICO, WHICH ON JULY 18 COMPLETED THREE YEARS SINCE IT STARTED OPERATIONS IN MEXICO WITH AN INVESTMENT CLOSE TO 130 MILLION DOLLARS.



**B**eiersdorf has been present in Mexico since 1959 through its main brands: Nivea, Eucerin, Labello and Nivea Men, which are well positioned in the likes of Mexican consumers.

On July 18, 2014, the company of German origin opened its second plant in Mexico, in Guanajuato Puerto Interior (GPI), which according to Juan Pablo Leymarie, managing director of Beiersdorf Manufacturing Mexico, "offered a sum of factors that allows economic development of our production center, as well as the personal development of our collaborators, who have access to facilities such as a kindergarten and a community center. As for the business, the logistics and infrastructure advantages are part of the services that helped us decide for the GPI. The Mexicans' confidence and willingness to work has exceeded the expectations of the company."

He emphasizes, that industrial cities like GPI allows the development of companies in line with the growth and development of the staff.

At the Beiersdorf Manufacturing Mexico Production Center, built on an area of 34,000 square meters, the production capacity is of 280 million pieces per year, although production may vary per year. "Beiersdorf will always be interested in growth. Every expansion program goes hand in hand with the investment available," comments Leymarie.

And as part of its social commitment to the Silao community, the Beiersdorf production plant, which has generated more than 700 direct jobs, contributes to the care of the environment by reducing 55 percent of CO<sub>2</sub> emissions, 20 percent in water use and 50 percent in energy use compared to other similar plants.

Likewise, it is certified Leadership in Energy and Design LEED Platinum. "It is the highest that the LEED system offers, something unusual for industrial buildings because of its large size. It is an achievement that we are proud of," says managing director Beiersdorf Manufacturing Mexico.

## Beiersdorf Manufacturing Mexico Production Center

**OCTOBER 17, 2012,**  
was the first stone  
of the plant **placed.**

**USD\$130 MILLION**  
is the **amount invested.**

**34,000 M<sup>2</sup>** covers the area  
on which the complex is **built.**

**280 MILLION PIECES**  
per year is its annual  
**production capacity,** although  
it may vary every year.

**700 DIRECT JOBS**  
generated, with a variety  
of professional levels.

**55% in CO<sub>2</sub> EMISSIONS,**  
**20% in WATER USE**  
**50% in ENERGY USE**  
that the plant has managed  
to **reduce.**

Source: Beiersdorf

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## THE 'LAND OF THE RAISING SUN' IN GUANAJUATO

KYB, A PIONEERING JAPANESE COMPANY IN HYDRAULIC TECHNOLOGY, INAUGURATED ITS SECOND PLANT IN GUANAJUATO PUERTO INTERIOR IN WHICH IT MAKES SHOCK ABSORBERS FOR BRANDS LIKE MAZDA.

**A**fter investigating among several possible places to start operations in Mexico, KYB decided to install in 2012 its first plant in Guanajuato, State that in the opinion of Tetsuo Ando, president of KYB Mexico, "offers a range of benefits such as location and infrastructure, as well as an attractive supplier base. Besides, the Government of Guanajuato made the process simpler and easier, providing advice and support to locate and train our workers."

"He emphasizes that KYB is committed to the expansion of its operations in Mexico and the acceptance of its products in the market will be the starting point to consider the installation of a new plant. "For us the decision to choose Guanajuato Puerto Interior was very easy, since it was a very convenient location, which includes a Customs House, access to the main roads, proximity to the Guanajuato International Airport and a railway station in the same place."

Also, Tetsuo Ando indicates that another factor that led them to choose the industrial city of Guanajuato Puerto Interior was the labor force. "Mainly, it was the workforce, mexican employees are among the best in

the world. Also, as many of the automotive components are for export markets, the wide range of trade agreements Mexico has, is very beneficial. Furthermore, the closeness to the United States is also key in the decision to set our operations in Mexico".

He underscores that Mexico is positioning itself as the fastest growing country in the automotive industry. "As more and more companies in the automotive sector are setting in the Bajío area, the participation in the global market is growing at a great rate. Not only OEMs are establishing their operations in Mexico, but also Tier 1 and Tier 2 suppliers. The production and export levels are setting new records each passing year and we consider that Mexico is positioning itself as the fastest growing country in the automotive industry."

### OIL PUMPS FOR CVT AND SHOCK ABSORBERS

And although the company KYB started in Mexico with the manufacture of oil pumps for CVT, in its new plant, included the production of shock absorbers due to the growth of the automotive industry in the Bajío area. Its second plant, inaugurated in May 2016, required an investment of 50 million dollars, although they are in the process of a new expansion, which will increase the final amount of the investment.

Currently KYB supplies oil pumps for CVT to Jatco Mexico as well as shock absorbers to Mazda. "And we are ready to provide Toyota and Nissan," says Ando.



**“**The right conditions that have been developing overtime have made the decision to come to Mexico very easy for most companies. The trade agreements with North America, Europe and Asia make the process of export easy and cost efficient.

Tetsuo Ando, KYB Mexico president.

**”**

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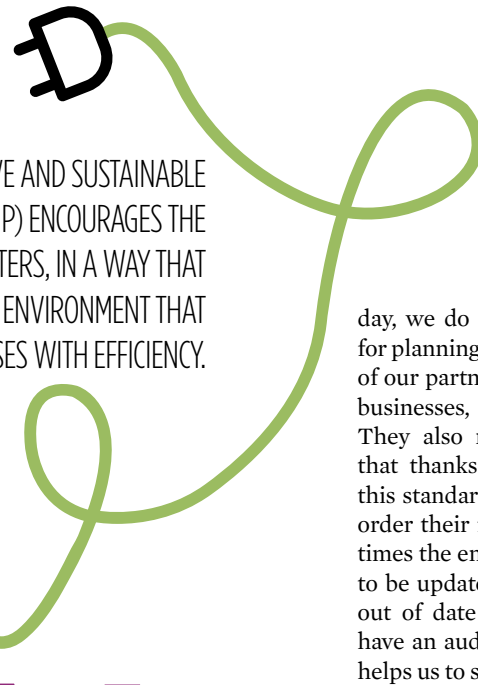
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WITH THE PURPOSE OF PROMOTING THE DEVELOPMENT OF COMPETITIVE AND SUSTAINABLE INDUSTRIAL PARKS, THE ASSOCIATION OF INDUSTRIAL PARKS (AMPIP) ENCOURAGES THE IMPLEMENTATION OF BEST PRACTICES IN ENVIRONMENT PROTECTION MATTERS, IN A WAY THAT THE COMPANIES ESTABLISHED IN INDUSTRIAL BUILDINGS OPERATE IN AN ENVIRONMENT THAT ALLOWS THE DEVELOPMENT OF ITS BUSINESSES WITH EFFICIENCY.

# Green INDUSTRIAL PARKS



day, we do not give ourselves time for planning and we know that many of our partners have quality in their businesses, but it must be showed. They also made us the comment that thanks to being submitted to this standard, they took the time to order their files, for example, many times the environmental impact has to be updated, because it is already out of date and you can suddenly have an audit or an infraction, so it helps us to stay current."

Regarding sustainability the AMPIP operates with work groups that currently focus in energy matters to achieve that sustainable parks can access the Mexican Wholesale Electricity Market and offer their tenants more competitive costs.

“We believe that not everything should be business, but also each company has the moral obligation to contribute to society and that is kind of the philosophy we have tried to promote in the AMPIP.”

Claudia Ávila Connelly, executive director of AMPIP.



Photographer: Mario Martínez.

## SUSTAINABLE INDUSTRIAL PARKS OF AMPIP

Intermex	Industrial Park Carolina	Clean Industrial Park (2016)
FINSA	FINSA Iztapalapa	Sustainable Industrial Park (2013)
IAMSA	Vie Verte Mexicali	Green Industrial Park (2015)
	Vie Verte Querétaro	2016
	Industrial Park Valle Bonito	2016

Source: AMPIP.

**B**yond selling or leasing industrial quality properties, the developers of industrial parks are obligated to offer value added as in any other industry whether in goods or services, especially in a global context where the competence increases daily and more demanding consumers show up.

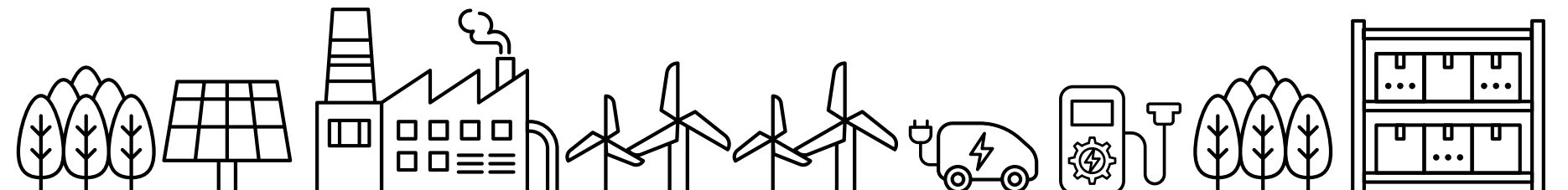
In an interview Claudia Ávila Connelly, executive director of AMPIP, states that over the past few years they started to notice that clients don't simply seek to rent but that the building show the implementation of environmental care practices.

"Also in the AMPIP we have had a learning curve through the alliances that we have established and we see that sustainability is not just environment as it is sometimes understood, but it also implies that the business be economically viable.

As well, there is a bond with society, now we can't think in a business that is not linked to benefit the social side, it is not an isolated part but it has to be integrated in a harmonious way," declares Ávila Connelly.

Three years ago the Sustainability Comitee of the AMPIP created the recognition 'Green Industrial Park' a self-diagnosis realized by industrial parks to identify actions in three specific aspects: power saving, water saving and waste management. "This self-diagnosis is done through an online questionnaire which has to reflect the compliance and then the file is submitted to the approval of the Sustainability Committee and if it is approved the recognition will be granted, that although it is not official because it is not granted by an authority, it does have for us an institutional validity and it has been very successful, because for our partners it's been a tool that allows them to meet with that market's demand as a step that eventually can't have the official certificate of Environmental Quality," she adds.

Besides, she explains that the recognition 'Green Industrial Park' helps industrial parks to order records, identify and describe processes. "Because many times, day by



## ¿WHAT IS THE GREEN INDUSTRIAL PARK?

Source: AMPIP.

As a first action to promote the protection of the environment, in 2013, AMPIP established the 'Green Industrial Park Recognition'.

Based on specific criteria to distinguish those developments that have taken actions to reduce water consumption, energy and pollutant emissions to the environment.

Candidates should also prove the compliance of current standards in these areas and provide evidences of commitment for Continuous Improvement through either training, process optimization, substitution of obsolete equipment or any similar action.

### Green Industrial Park is a development:

a) with actions in energy, water and environmental protection that comply with minimum parameters or above the ones established in the Mexican or international valid regulations; and b) that follows permanent and verifiable actions for the improvement of processes, equipment and systems, with a positive impact in the preservation of natural resources and environmental protection.

## SAFE INDUSTRIAL PARKS

Currently the AMPIP develops criteria to create to 'Safe Industrial Park' recognition, which is starting to be a market demand.

"We are very active in the subject of sustainability because we also see that worldwide there is a tendency to take industrial developments to another level, as a new generation of safe, sustainable and quality industrial parks. We have seen that these ideas have been well received by the AMPIP partners, because it is not an issue that occurred to us or that comes out of the concerns of our partners, an association that represents the sector must always be attentive to what occurs in the market and what the membership requires, for that we exist, to attend them, because for them it would be more complicated to do it individually than in a group", says the executive director of AMPIP.

In fact with the purpose of showing the advantages of industrial parks and make them more attractive to investment, since 1999 the AMPIP promotes the certification of industrial real estate developments in Mexico under the Mexican Standard for Industrial Parks that verifies the compliance of quality standards in the design of territorial area of the industrial park, as well as of internal infrastructure and the public services. With that it is intended that the industrial park provides certainty to its tenders, guaranteeing the availability of industrial area in optimum conditions for the manufacturing operations.



FINSA Iztapalapa

**AMPIP** represents owners, investors and managers of parks and industrial buildings

**250 INDUSTRIAL PARKS**  
are represented by the **AMPIP**.

**+2,500 national and foreign tenants**  
are located in the industrial parks members of the **AMPIP's**.

**90% OF THE MARKET**  
for the **large-scale** segment covers **AMPIP**.

**AT LEAST 10,000 SQUARE METERS**  
is the size of the **industrial warehouses** that agglomerate the **AMPIP**.

**6 INDUSTRIAL PARKS**  
of the **AMPIP** have **certifications** that guarantee the **care of the environment**.

Source: AMPIP

"For us the basic thing is the Mexican Standard because from there we start in terms of quality. This year, the 2015 version has already been published, and we now have more than 20 industrial parks in the process of certification, because I believe we have succeeded in implementing that quality culture of which ten years ago there was not much interest, but today people already has realized that in addition to being healthy to implement best practices always to be in continuous improvement in the parks, customers value it and finally the market also redeems. So, today we see that there is a different attitude; there is a lot of proactivity in implementing these policies," indicates Claudia Ávila.

She concludes that in Mexico there are parks with the same quality standards that are handled in the United States and Canada, as customers demand it. "In the industrial parks we represent, we have about 2,500 companies established; of those 42 percent are of American origin, so they need to operate under certain standards, to which they are accustomed to there, so developers are forced to offer that same standard in order to attract customers."

<http://ampip.org.mx/en>

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- Standardization
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Our solutions apply to a wide range of industries:

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- Gas products
- Highly Tech equipment
- Measurement equipment
- Tire and plastics
- Telecommunications
- Led Technology
- Electronic Games Systems and Devices
- Software Products
- Water (showers, toilets, faucets, flow meters, etc.)
- Personal Protective Equipment (helmets, masks, footwear, etc.)

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SIMPLIFYING THE CONVERSION OF EXISTING INDUSTRIAL PARKS AND ENHANCING THE ACTIVITY OF COMPANIES OPERATING WITH SIMILAR REGIMES IN THESE PROPERTIES IS ONE OF THE ADVANTAGES GRANTED BY THE NEW DECREE FOR THE STRATEGIC BONDED WAREHOUSE (RFE, IN SPANISH) SUBMITTED IN FEBRUARY OF LAST YEAR BY THE TAX ADMINISTRATION SERVICE (SAT) IN MEXICO.

# RFE

FACILITATES  
EXTERNAL  
TRADE

## ANUNCIO

**"N**ow it is feasible for all industrial parks to become Strategic Bonded Warehouses. It is a very competitive customs operation scheme that decreases shipping costs and time in customs procedures in ports and borders. This regime consists in the introduction, for a limited time, of foreign, domestic or nationalized goods to the RFE's to be handled, storage, safeguard, exhibition, sell, distribution, elaboration, transformation or repair," explains in an interview Michele Porrino Perassi, executive director of WTC Industrial San Luis Potosí, the first authorized RFE in Mexico.

It is worth mentioning that the RFE is a property located within the circumscription of any customs, which is enabled for the introduction of goods. And in the case of the WTC Industrial San Luis Potosí, Strategic Bonded Warehouse has been a factor that has influenced in the decision of companies that have



decided to establish in the State and spearhead to attract new companies at operating under this regime. “They have considerable benefits when operating under this scheme and it gives them certainty in the customs operation that becomes savings for each company installed in an industrial park with these services,” says Perassi.

Likewise, he emphasizes that the RFE is an additional attraction offered to companies with intensive flow of foreign trade, so it drives the commercial development of an industrial park. “It simplifies inventory control to manufacturers and logistics service providers, as well as bring foreign trade goods closer to consumers in minutes from their plants or distribution centers.”

According to the Mexican Government, this customs regime allows to strengthen the level of competitiveness of the country’s manufacturing industry, mainly of those whose operations are oriented towards international markets, reducing logistics costs and increasing the efficiency in the customs operations.

The benefits that the RFE provides to companies also imply control and reliability requirements in tax, customs and foreign trade matters that allow them to develop in a strictly controlled environment, and additionally of granting several administrative facilities to taxpayers who obtains the authorization to enable a property as RFE and to those who obtain the authorization to destine goods to that regime (operators), as well as to make the procedures for these authorizations and the operation of the users more flexible.



**At the international level, similar models have been adopted to the Strategic Bonded Warehouse in terms of its operation, logistical facilities and objectives to promote economic development and international trade in certain regions.**

## AN RFE IN DURANGO

The Integral Center of Strategic Audited Services (CISEF), based in Gómez Palacio, Durango, is the first Strategic Bonded Warehouse authorized by the SAT as of the publication of the 2016 decree which makes the rules more flexible and adds advantages to this new scheme and their operators.

Zaira Padilla Ortiz, director of Operations of CISEF, states in an interview that within the RFE will be seven speculative industrial warehouses that will receive operators in the short term. “The building in which we are located, already had previous infrastructure, so we are rehabilitating these industrial warehouses so that they meet the general characteristics that companies require. This facilitates in a short term that operators can install and benefit from the regime. For those who have particular building of construction needs of an industrial warehouse with defined characteristics we have additional land to build the build to suit”.

And although the area authorized to develop the CISEF is 12.4 hectares, this RFE can grow based on the needs of the industrial sector. “This RFE benefits two sectors of industry: first, are those companies that want to settle in the country under the most competitive operating nowadays tax scheme and those that are already operating foreign trade in Mexico and want to benefit from the virtues of the RFE to store, distribute, sell, exhibit or even produce their merchandises; besides, Gómez Palacio offers a privileged geographical point, and one example is that we are six hours away from the main border with the United States, which is Nuevo Laredo, and four hours away from the port of Mazatlán, in the Pacific. We have a very important point of connectivity at a national level.”

Currently, the calling of the CISEF region has been oriented to the automotive sector but thanks to its geographical location there is interest in another kind of industry, for example, as a fuel distribution center. “As a result of the energy reform, the scheme still increases the competitiveness of this kind of industry, but I do not want to mention that in the Comarca Lagunera also prevail the food sectors, particularly meat products, as well as milk and its derivatives and the metal-mechanical sector,” says Ortiz.

She points out that the objective of CISEF is to encourage and grant facilities to import and export companies allowing them to adopt new ways of operating and doing business by reducing their times, as well as their logistical and administrative costs.

Next November, the General Customs Administration will review that the CISEF complies with the requirements of equipment and infrastructure to authorize the beginning of the operations. “By doing so, it commences the reception of operators; by having the infrastructure for the operators in these industrial warehouses they can obtain almost immediate authorization.”



## BENEFITS OF THE RFE

Fiscal	Operating	Administrative
Immediate certification of VAT/ IEPS, at demonstrating that they have the authorization of RFE operator.	The extension can be obtained automatically, upon request.	No minimum surface area is required to obtain authorization.
It will be applied a DTA of 1.76 to a thousand for fixed assets and a fixed quota for the rest of the merchandise.	Immediate registration in the register of importers of specific sectors, once it proves that it has the authorization of RFE operator.	There is no need to submit a study demonstrating the economic and financial viability of the RFE project, with a favorable opinion issued by BANOBRAS.
Introduction to the RFE national and international merchandise final for storage, exhibition, sale and distribution, without these being destined to the regime of RFE, which will not be considered exported.	It will be possible to carry out the clearance of goods for their introduction to the RFE regime, and the extraction of the same, before any customs, even on non-working days and hours.	The extension can be obtained automatically, upon request.
	The term of stay of the goods will be 60 months for merchandise in general and for the validity of the authorization for machinery and equipment.	The requirement to submit certified copies of the articles of incorporation and their amendments is eliminated.
	The establishment of Manufacturing, Maquiladora Industries and Export Services (IMMEX) within an RFE will be allowed.	It is not required to present a positive opinion on compliance with tax obligations.
	The origin of the goods can be rectified within three months of the clearance of the goods, provided that no powers of verification have been exercised.	The requirement to submit a simple copy of the concession title of the Integral Port Administration is eliminated.
	National or nationalized merchandise can be extracted from the RFE to re-enter the domestic market without being considered as import, provided that they don't exceed 60 months and don't have modifications.	It is not necessary to submit written document with the approval of General Direction of Integral Administration Port of the SCT (Secretariat of Communications and Transportation).
	If it is located adjacent to a fiscal warehouse located in the border strip of the country, they may carry out the joint clearance.	The construction of the project may be planned in modules.

Fuente: [www.sat.gob.mx](http://www.sat.gob.mx)



# A city with industrial V O C A T I O N

WHAT STARTED AS THE GREAT IDEA OF A GROUP OF ENTREPRENEURS TODAY, 11 YEARS AFTER STARTING OPERATIONS, HAS BECOME AN UNPRECEDENTED BUSINESS AND INFRASTRUCTURE PROJECT IN LATIN AMERICA, WHICH HAS BEEN THE SPEARHEAD OF THE ECONOMIC DEVELOPMENT OF THE PARKS AND INDUSTRIAL CORRIDORS OF THE STATE OF GUANAJUATO, AS WELL AS TRIGGER OF THE ATTRACTION OF INVESTMENTS TO MEXICO. IT IS THE GUANAJUATO PUERTO INTERIOR, DEVELOPED OVER AN AREA OF 1,200 HECTARES THAT HOUSE MORE THAN 100 COMPANIES THAT HAVE SECURED A HISTORICAL INVESTMENT FOR MORE THAN 3,500 MILLION DOLLARS AND GENERATED MORE THAN 16,000 REAL JOBS.



**I**n the heart of Mexico, in the State of Guanajuato, there were no industrial parks, however, the creation of the Guanajuato Puerto Interior (GPI) detonated them. In the municipality of Silao de la Victoria, where the GPI is located, more than 100 companies have been established to form an industrial and business complex where there are also universities, research centers, malls, financial district and, of course, industrial parks.

“The GPI has been a reference of the new industrial parks, the new face of Mexico of this kind of modern parks. The GPI has promoted good practices and changed the concept of the industrial cities from that of 20 years ago, where inside there were no parking lots for companies and they parked in the streets, here it is prohibited and we have patrols to fine the trucks that park in the street. We proposed the companies that their operations had to be within their land, so that in the construction of the industrial warehouse a 10 percent has to be garden and a 40 percent maneuvering yard, that gives you a totally different structure where 16,500 people are working here and 2,000 boys are studying at the National Polytechnic Institute (IPN). We have a city with almost 20,000 people and 13,000 vehicles coming in and out every day. We have approximately 925 hectares for the industrialization of the 1,380 hectares of the whole park, the rest are roads,

## Guanajuato Puerto Interior

**11 YEARS** of operation. | **1,200** hectares.

### 4 INDUSTRIAL PARKS:

Santa Fe I, Santa Fe II, Santa Fe III and Santa Fe IV.

**+100 COMPANIES** | **1 AERONAUTIC PARK**  
installed. | of 80 hectares.

**2,000 STUDENTS** of the Interdisciplinary Professional Unit of Engineering Campus Guanajuato of the **IPN**.

**13,000 UNITS** per day | **+16 REAL JOBS**  
is the vehicular flow. | generated.

**18 COUNTRIES** present. | **+3,500 MILLION DOLLARS**  
have been invested  
by foreign companies.

Source: Guanajuato Puerto Interior.

“The GPI has become an international reference of good practices where a set of synergies occurs, it is in reality a city with a very important industrial vocation. You have an airport, rail freight central, land connections, customs, which are not to be found anywhere else.

Luis Manuel Quiroz Echegaray, Guanajuato Puerto Interior CEO.

” service areas, etc.”, comments in interview Luis Manuel Quiroz Echegaray, Guanajuato Puerto Interior CEO. “The GPI has become an international reference of good practices where a set of synergies occurs, it is in reality a city with a very important industrial vocation. You have an airport, a central railway charge, land connections, customs, which are not to be found anywhere else,” says Quiroz Echegaray.

He adds that when viewing the GPI as a logistics platform, they also considered the creation of four industrial parks, which in turn were the stages of a large park, which has already been fulfilled.

The four industrial parks are Santa Fe I, Santa Fe II and Santa Fe IV, occupied one hundred percent, and Santa Fe III, which is sold at 80 percent. “We have an additional park that is the aeronautical park, 80 additional hectares where we already have all

the connection infrastructure; it is a new cluster that carries a totally different vocation because here we have automotive vocations, food products, footwear projects, distribution centers, construction centers, personal care, pharmaceutical, logistics, mechanics and plastic. So now we have the aeronautics and a Santa Fe VI which is a reserve of 70 hectares that will house companies that wants establish in the GPI, although we are not going to extend much because the design of roads does not give us more," comments Quiroz Echegaray.

In terms of connectivity, the GPI has the proximity of the Guanajuato International Airport, a multimodal rail terminal and a highway interconnection that is a strategic point that distinguishes this logistics and business center.

"There is a strategic point that Guanajuato has, because it is in the heart of the country. That gives us a strategic advantage, not only is the factor of the export, which was what in the beginning generated the maquiladoras, as it was its strategic location regarding the border. Now companies think of the duality of using the domestic market as a power and also export, and the most interesting area is the Bajío," emphasizes GPI CEO.



## WORD OF HONOR

In the GPI there are more than 100 Mexican companies but also from Japan, United States, Italy, Germany, Canada, France, South Korea, Austria, Brazil, Chile, Slovenia, Spain, Poland, Portugal, Switzerland, Taiwan, Tunisia and Holland origins. "There are 18 countries that we have here and among all of them have made an investment of 3.5 billion dollars, which is a trigger for all development of the entity," says the GPI CEO. And although the sector that predominates is the automotive sector, the strategic location of the GPI has allowed the installation of strategic distribution centers of several companies, especially footwear. "We have Coqueta, Emyco and Price Shoes which is going to install there and already bought the land; a medical distribution center for all state hospitals; industry of plastic and chemistry, these are the types of industries we have here, which gives us a certain diversification."

Luis Manuel Quiroz Echegaray underscores that "there is no company in Guanajuato that has been missed. Companies arrive to places that give them confidence. Companies believe in Guanajuato because the State has kept its promises. In Guanajuato there are five sexennials that are betting on the same project. So what a ruler offers to a company, the next one takes it as a word of honor. That is a generation of confidence and worth's a lot for foreign companies. Precisely when they see the infrastructure here, treatment plants, water control, solar cells for lighting, electrical substations, in synthesis, the quality in operation, is based on that quality to be established in the GPI".

The CEO concludes that the GPI is a city that is prepared and organized to operate five decades. "We are a city that has many components and that really facilitate a lot the operations of companies, because in first place we have already defined the future, which is one of the things that people know and we guarantee it. Those who define their future are the entrepreneurs themselves and they set their limits. We believe that what these that we are living today, that is well organized, lasts 40 or 50 years, then it depends on the entrepreneurs. The GPI is the specialist in the administration of the industrial city."

“Here the entrepreneurs own their land. Besides, another key concept is that entrepreneurs do not want to municipalize this industrial complex, because they want to receive the level of service which they are accustomed.

Luis Manuel Quiroz Echegaray.

”

<http://puertointerior.com.mx>

# ANUNCIO





IN 2018 WILL DETONATE THE FIRST INVESTMENTS OF THE SPECIAL ECONOMIC ZONES IN CHIAPAS, VERACRUZ, MICHOACÁN, GUERRERO, YUCATAN AND OAXACA, WHOSE OPINIONS WERE APPROVED IN JUNE OF THIS YEAR BY THE INTERSECRETARIAL COMMISSION OF SPECIAL ECONOMIC ZONES (CSEZs).



# SPECIAL

# ECONOMIC ZONES UNDERWAY

**A** Special Economic Zone (SEZ) is a geographically delimited area that offers a business environment with tax benefits, special customs regime, agile regulatory framework, competitive infrastructure and support programs. The objective is to attract productive investment and create jobs that multiply profits in the regions where they establish.

In an interview, Gerardo Gutiérrez Candiani, head of the Federal Authority for the Development of Special Economic Zones, declares that in 2018 the investment process will begin in different SEZs. "We will define a large polygon in each of the zones, where there will be sections to invest. The authority will have the power to grant concessions of federal land to a full administrator, there is going to be made, kind of an industrial park, that is, a

40 year concession with the possibility of renewal for another 40 years. All the extended polygons that will cover the zones will have federal land, and additionally, will have a modality called 'Sections', where the authority under certain requirements will allow that a private investment could also be full administrator of its own investment; this is especially thought for anchor companies and large investments that by its very nature, needs very large spaces of land and prefer to be on private property than in a franchised land. So these are the modalities."

Each polygon will be organized from the callings and natural comparative advantages of each SEZ. "On that we will promote the investment. Each zone is also chosen to have access to the main markets and basic infrastructure for that to be boost, and I mean access to ports, railways, roads and airports, so that this infrastructure help the SEZs become more competitive," explains Gutiérrez Candiani. It is worth mentioning, that potential investors have already been identified for the SEZs, as well as the establishment of the 'single window', which will simplify and streamline the procedures and regulations of companies in the SEZ and in the Area of Influence.







## CALLINGS OF THE SEZS

Puerto Chiapas, Chiapas	Agroindustry, auto parts, electronic and electrical.
Coatzacoalcos, Veracruz	Development of clusters of petrochemical, plastic, chemical and metallurgical industries.
Lázaro Cárdenas, Michoacán	Automotive, agroindustry, steel industry and metal-mechanics
Progreso, Yucatán	Information and communication technology, research and development, information processing and telecommunications services.
Salina Cruz, Oaxaca	Agroindustry, electronic and electrical, metal-mechanics, and textile-dressing chain.

Source: Federal Authority for the Development of Special Economic Zones

## SEZS AND INDUSTRIAL PARKS

The head of the Federal Authority for the Development of SEZs says that SEZs are windows of opportunity for developers of industrial parks. “We are going to invite the developers of industrial parks in Mexico, the Mexican Association of Industrial Parks, to participate in the tenders. They have a great experience, besides being very successful globally and can partner with local entrepreneurs or with international businessmen or go alone to develop macro industrial parks.”

He emphasizes, that there is a set of public policies that will help to encourage investment by developers of industrial parks in the SEZs. “First, there is a package of federal and local incentives; a ‘single window’, where the three levels of government will be synchronized so that all licenses, payments, facilities and openings can be done in a single exhibition, in record time and with great transparency, that helps a lot to the facilitation of companies.”



Photographer: Mario Martínez.

GERARDO GUTIÉRREZ CANDIANI

Head of the Federal Authority for the Development of SEZs.

Likewise, he adds that there will be a ‘Cluster of Services’ focused on foreign companies that come to Mexico for the first time. “In this cluster of services we are going to include financing, training, legal advice, customs agents, translators, everything the company needs for its installation and operation, with the main associations and business chambers in Mexico and their representations in the States, in the regions, there are going to be these facilities for the investor to arrive and have everything solved. I think it is a very inclusive project; it is a project with a vision where we are trying to encompass the whole circle of what investments need to be able to boost and generate in these SEZs.”

Gerardo Gutiérrez Candiani declares that both, already established entrepreneurs and national and international entrepreneurs could take advantage of the SEZ to generate new projects, manufacture new products and can be integrated. “And that through this incentive package they can generate a substitution of imports and can be produced many products in Mexico, without these conditions won’t be competitive. Callings are going to be promoted and that for obvious reasons are much more competitive in that zone and this will facilitate the work.”

He concludes that all SEZs are focused in transformation industries, therefore, competitiveness is very clear. “We are in geographical areas where there is a high competitiveness because we have access to the main markets worldwide, both Pacific and Gulf. You have sea, rail, and connectivity. Also, the conditions of legal certainty and constitutionals, that is why it is very important. And a third one, the whole package of tax incentives, non-fiscal, financial, credit, etc. All this is a very solid complement that is not found other parts of Mexico, and something really extraordinary had to be done, in addition to what has been done, so that the south-southeast could have a solid viability for investments to flow”.

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# High impact ROAD

## INFRASTRUCTURE

In Mexico, in the State of Tlaxcala, the Trust of Industrial City Xicoténcatl is located and it manages three industrial cities: Ciudad Industrial Xicoténcatl I, in Tetla; Ciudad Industrial Xicoténcatl II, in Huamantla; and Industrial City Xicoténcatl III, in Tlaxco. Recently, Ciudad Industrial Xicoténcatl I-Nicolás Bravo-Ciudad Industrial Xicoténcatl II-Huamantla highway was modernized and expanded to provide greater connectivity, safety and efficiency in the movement of people, goods and merchandises, which means greater speed and lower consumption of fuel, according to the Communications and Transport Secretariat (SCT).

This work, besides of reducing the time of travel of 35 to 15 minutes, contributes to intensify the exchange between the three industrial parks of auto parts, textiles and electronics established in that region, which, according to the SCT, encourages productive activities and job.

According to the Secretary of Communications and Transportation Secretariat, Gerardo Ruiz Esparza, the development of this type of infrastructure in Mexico seeks to connect production centers with ports, airports and borders to strengthen economic activities and the employment of Mexicans.

In an interview, the undersecretary of Infrastructure of the SCT, Óscar Raúl Callejo Silva, emphasizes that at

least in the last four years the strategy of the Mexican Government has been to develop high impact infrastructure. “We can’t decouple infrastructure from productivity and that it means competitiveness for the country. And that was finally the axis we followed to make the National Infrastructure Plan, in other words, that it had a logic that would boost, give and carry economic or social development. What good is to have industrial corridors if we do not have them connected? We must ensure that production has lower costs because we are going to save time, because less pollutants will be issued and, besides, less fuel will be consumed, and that is part of having an infrastructure not only agile but a high impact one.”

The undersecretary explains that high-impact infrastructure is also identified as ‘high specification’ infrastructure, which guarantees friendly geometries so that the roads are safe, with speeds of 110 km/hour, depending on the traffic jam.

He mentions that the industrial corridor of Bajío, between Querétaro and Aguascalientes, is an example of logistic and highway planning.

In fact, he reveals that it is from the international experience in road development, that Mexico has managed to develop infrastructure of high specifications. “We have put in practice those experiences, many of them about planning, better technologies, pavements, exploitation of tunnels and structures verification techniques. We try to give it a feedback, as the Japanese and the Germans have considerable advances in road infrastructure,” says Callejo Silva, who is the president of the Commission of Strategic Plan of the World Road Association, of which Mexico is one of the 121 members.

National  
Infrastructure  
Plan (NIP)  
2013-2018

291 STRATEGIC  
projects contain the NIP.

1.44 BILLION  
pesos of investment.

52 HIGHWAYS.

80 ROADS.

50 DISTRIBUTORS.

70% is the  
GLOBAL ADVANCE  
with 542,000 million pesos.

70% of private  
and 30% of public  
INVESTMENT.

50,000 km  
of federal highway network.

33,000 km  
of rural roads.

78% OF THE CARGO  
that moves in Mexico  
is done by boat,  
train and vehicle.

Source: Secretariat of Communications  
and Transport. Government  
of Mexico.

“We can’t decouple infrastructure from productivity and that it means competitiveness for the country.”

Oscar Raúl Callejo Silva,  
undersecretary of Infrastructure.



Photographer: Mario Martínez.

### CONNECTIVITY AND MOBILITY

The undersecretary of Infrastructure reveals that one of the key factors that influences in the decision making of foreign investors to establish in any State of the country is the location in terms of logistics. “They are interested in knowing where they are going to connect. In San Luis Potosí, for example, in the boulevard that runs through Querétaro, the industrial zone has grown a lot and several assembly plants are being established, because they know that from there they can reach Nuevo Laredo and from there to the East of the United States. The Bajío is the center of Mexico, so investors often make decisions based on location.”

In this context, Óscar Callejo mentions that the arrival of foreign investment in Mexico has also encouraged the approach of state governments to the SCT to express connectivity and mobility necessities. He affirms that Mexico is also attractive to investment as a logistics node thanks to the extension of its coastlines, besides its large ports that continues to double its capacity based on the actions taken in terms of road connectivity matters.

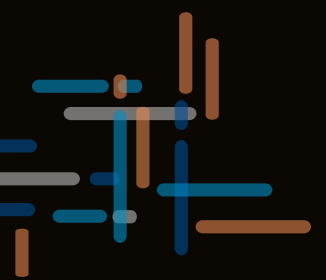
“Not only do the Americans use our ports, the Asians and the Europeans, also precisely because of the connectivity with the United States. Now Veracruz is the port that has more movement, of almost 25 million tons. The most used ports in the Pacific are Lázaro Cárdenas and Manzanillo, because by land they connect faster towards United States border,” says Callejo Silva.

He concludes that the purpose of the SCT is not only to have better roads, but to ensure that the country is more productive and compete more abroad, especially in a context where more foreign investment is expected to arrive to Mexico.



# THE MEXICAN AEROSPACE INDUSTRY ACCELERATES

ACCORDING TO MEXICO'S SECRETARIAT OF ECONOMY, FROM 1999 TO 2016, THE COUNTRY'S AEROSPACE SECTOR HAS ATTRACTED USD\$3,000 MILLION IN FOREIGN DIRECT INVESTMENT, WHICH HAS LANDED IN BAJA CALIFORNIA, CHIHUAHUA, QUERÉTARO, NUEVO LEÓN, SONORA, YUCATÁN AND NOW IN GUANAJUATO, WHERE ON JUNE 8, THE CONSTITUTIVE ACT OF THE AEROSPACE CLUSTER OF GUANAJUATO WAS SIGNED AND THE SKYPLUS LOGISTICS & AEROSPACE PARK IS BEING BUILT IN SILAO, THE FIRST PARK OF THE AEROSPACE INDUSTRY IN THE STATE.





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**I**n recent years Mexico's aerospace industry has grown rapidly. It is around the year 2000 when several original equipment manufacturers suppliers (OEMs) decided to establish in the country. Mexico has understood very well the aerospace industry and that is why there is a significant development of manufacturing operations in that sense," state in interview Luis Lizcano, general director of the Mexican Federation of Aerospace Industry (FEMIA).

It is worth mentioning that according to the information provided by ProMéxico, the Mexican aerospace sector is comprised by companies dedicated to manufacturing, maintenance, repair, adaptation, engineering, design and ancillary services (airlines, test laboratories and training centers, among others) of commercial and military aircraft.

He adds that investment opportunities in this industry are linked to the completion cycle of the aircraft and even to the reach of new suppliers. "For the size of the market that Mexico has we have many OEMs and many suppliers Tier 1, and in Tier 2 and Tier 3 there are important opportunities. Then the opportunities are in the suppliers of original equipment. Without a

**“Growth in the aerospace sector will continue as long as we know how to take advantage of the opportunity to develop the supply chain here in Mexico, to insert ourselves into the industry's supply chain schemes.”**

Luis Lizcano, general director of FEMIA.



Photographer: Eliodoro Diaz.



doubt, the development of the supply chain is a trigger for the sector and its future activities."

Likewise, reveals that in 2016 exports of the country's aerospace industry grew by an average of 10 percent per year. "If we take the last 12 years, from 2004 to 2016, we have an average annual growth of 15 percent, we are talking about that in 2004 they exported from 1,200 to 1,300 million dollars and in 2016 closed with 7,200 million dollars, which is an important quantitative jump, that is to say, five or six times in a period of 12 years in an industry where cycle times are long and where things move very slowly compared to other sectors."

Companies such as Bombardier, Grupo Safran, General Electric, Honeywell and Eurocopter have found in Mexico the conditions to develop design and engineering centers, laboratories and production lines capable of rapid evolution to handle more complex assignments in the development of new generations of engines, components and airframes.

"We estimate that approximately in our aerospace sector there are about 285 companies as such, but established in industrial parks are a little more, because there are between five or six plants belonging to a same company. Of these companies we practically have around 100, although there is still potential. We know that over time and with the programs we are developing in the organization there is also an increasing interest in being a member of FEMIA," says Luis Lizcano.

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## INDUSTRIAL PARKS FOR THE AEROSPACE INDUSTRY

Besides, the appealing of the geographic location, the availability of the technicians and engineers experts in worldwide advanced manufacturing, to those qualities it can be added the availability of industrial spaces.

The general director of FEMIA confirms that several aerospace plants are installed in industrial parks." Many of them, OEMs and Tier 1, even there is a fair amount of Tier 2 that are within industrial parks, and although the size of operations from the real estate standpoint is a bit smaller, for someone who is dedicated to operate, develop and operation of industrial properties, this has its charm, precisely because the contracts are much longer-term than those of other companies."

Currently, in the industrial complex Guanajuato Puerto Interior, SKYPLUS Logistics & Aerospace Park is being built, the first aerospace industry park adjacent to the Guanajuato International Airport, in addition to connecting with Mexico's most important seaports and the northern border with the largest market in the world, United States.

In an interview, Martín López, Sales Manager of SKYPLUS Logistics & Aerospace Park, declares that they decided to invest in Guanajuato Puerto Interior because it is the most important logistics industrial platform in Mexico that has consolidated with more than 100 first level companies from 18 countries and from different industries. "We believe that the first level infrastructure that the Guanajuato Puerto Interior has can allow us to have an additional competitive advantage to the services that we can offer in the park.

Within this infrastructure, some of the things that have mostly convinced us to invest is the existence of the container's rail terminal, which is the fastest growing in the country; the International Airport with daily flights to the main cities of Mexico and the United States, which gives it a great connectivity to the entire area."

In a property of 80 hectares of which 67 will be commercialized, SKYPLUS will be built in three stages, as López explains: "Based on the analysis of the construction, the park will be developed in three stages that will be completed according to the demand or the requirements. The first stage consists of approximately 30 hectares the urbanization has begun and will be completely on the fourth quarter of this year. The second stage is approximately 25 hectares, which will be completed by mid 2018 and, finally, the third stage will be completed on the first half of 2019."

For the SKYPLUS the initial investment will be for approximately USD\$22million in infrastructure, although the approximate total amount, that includes the companies that will install its plant, will be around USD\$190 million." Kind of companies go from the ones developing new products or parts of aircraft components, to development centers of prototypes development centers, parts manufacturing and aircraft systems, logistics and airport equipment companies. The truth is that the aerospace industry is very broad, we bring several companies from different areas," says the Sales Manager of the Aerospace Park.

For the president of FEMIA, the SKYPLUS is an example of an area of opportunity for investors to establish in Mexico in industrial spaces of the first level.

## DYNAMISM IN THE BAJÍO

The Sales Manager of SKYPLUS Logistics & Aerospace Park points out that the facilities of this aerospace park will strengthen the Bajío Region through greater competitiveness that will make it a high-end destination for aerospace manufacturing. "We see ourselves as a complement to what already exists in Querétaro, of the large companies that are established in that State that fortunately is next to Guanajuato. Finally, foreign investors are starting to identify macro regions, next they go to countries and within countries do not necessarily focus on a city or state, they analyze the availability of resources and infrastructure at the regional level, so I think the Bajío Region is a great success case, so far, mainly in the automotive industry but also it is already emerging as a leader in the aerospace industry."

Querétaro is one of the five States where the aerospace industry is concentrated, although according to Luis Lizcano, 19 of the 32 States currently carry out operations in this sector.

It is worth mentioning that the State of Querétaro entered the aerospace industry from the construction of the Intercontinental Airport, the installation of the Aeronautical University (UNAQ) and the Aerospace Park.

In an interview, Juan Corral Martín, president of the AeroCluster of Querétaro, indicates that the companies have decided to settle in the Querétaro aerospace cluster thanks to the government's plan to attract foreign direct investment. "Querétaro stands out unlike other States for receiving much of the foreign investment in the last 10 years, this can exceed 50 percent, considering that the cluster has less than 10 years of existence. The second is the focus on innovation and technology, and this is supported by its research and development centers, in particular by the National Center for Aviation Technologies which is about to be inaugurated and will focus mainly on composite materials.

He adds that the State has also distinguished itself for developing an education based on skills, that is to say, all the necessities in terms of training required by the aerospace sector and attended at a higher education level through the National School of Professional Technical Education (CONALEP).

José Antonio Velázquez, general coordinator of the AeroCluster of Querétaro, mentions that at the state level, they are also concerned about the development of the supply chain. "Constantly we are working on projects so that the leading companies arriving are complemented with companies already installed in Querétaro or that are needed to bring in to complement that supply chain. At a state level, at least in our cluster, we have six small and medium enterprises that are constantly looking for new opportunities to integrate into the supply chain."

[www.aeroclusterqueretaro.mx](http://www.aeroclusterqueretaro.mx)

## The Mexican aerospace sector

**7° IS THE PLACE** where Mexico has positioned itself as an aerospace supplier in the **United States market.**

**USD\$12.3 BILLION** is expected to be exported by the Mexican aerospace industry in 2020.

**7.7% IS THE GROWTH** in exports with which the aerospace industry started in 2017.

**USD\$3,000 BILLION** in Foreign Direct Investment has attracted the aerospace sector in Mexico from 1999 to 2016.

**287 AEROSPACE** companies and support entities are located in Baja California, Chihuahua, Jalisco, Nuevo León, Querétaro, Sonora, Coahuila and Yucatán.

Source: Secretariat of Economy.

He declares that Querétaro is one of the few States that has highly specialized industrial parks in the aerospace sector. "Where the airport is, within 10 kilometers radius you can find a wide range of aerospace companies and the Aerospace Park is an example, there it is Bombardier, Safran and other companies. We have other companies that are established in the Industrial Park Querétaro that is in the area of Santa Rosa Jáuregui, there are two plants of Safran and Arnova, these are the two main regions. Some other companies were already established in Querétaro, for example, ITP, formerly called ITR, which was recently acquired by Rolls Royce, they are established in the Industrial Park Benito Juárez and there are other small and medium companies that are not necessarily established in an industrial park."

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INDUSTRIAL WAREHOUSES THAT DOES NOT EXCEED 500 SQUARE METERS ARE DEVELOPED IN THE BAJÍO, IN STATES LIKE QUERÉTARO, TO RESPOND TO THE NEEDS OF SMALL AND MEDIUM COMPANIES (PYMES) THAT SERVES TO THE SUPPLY CHAIN OF THE METAL-MECHANICS, AUTOMOTIVE, WHITE GOODS, AERONAUTICS AND FOOD INDUSTRIES, MAINLY.

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# microparks

IN THE BAJÍO

**I**n the town of Tierra Blanca, in the municipality of El Marqués, in the State of Querétaro, in a modern and sustainable industrial environment, based on a functional architectural design, the industrial buildings that will form the first of several industrial microparks ATTA were built.

Neighboring the Industrial Park Querétaro, heading to the State of San Luis Potosi, it develops the industrial micropark ATTA, whose two first stages are already concluded. It is planned that the complete construction, made up of 140 industrial buildings, will be finished at the end of 2019.

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“Industrial micropark ATTA is built under condominium property regime, which guarantees the maintenance of the areas, with a fee that covers the street lighting, gardening of green areas and conservation of the water treatment plant, which gives PyMEs the opportunity to work in a safe, orderly place that also generates surplus value.

Gregorio Peláez,  
Construction director of ATTA.

”



## MEXICAN INVESTMENT

The development of the industrial micropark is backed up, by a capital investment of Mexican origin. “We are not against foreign capital, but practically as things are happening, the park starts with its own capital. The total investment in the park is roughly around 400 million pesos for the complete project. Today, the kick off began with approximately 30 million pesos and as the stages are developing the investment will be close to 400 million pesos,” declares Gregorio Peláez.

Foreign buyers who already have industrial warehouses in the ATTA micro industrial park are of Italian origin, although the Americans and Canadians have also shown interest. From Mexico there is capital that came from Puebla, Mexico City, Michoacán, Monterrey, Estado de México and other States in the center of the country. “Querétaro is today a State that many investors are looking at. There are people from Monterrey, we have investors practically from many states of the Mexican Republic. We are negotiating with investors of different countries, who are very interested in arriving to Querétaro for its geographic location and for the growth of the industry in the State and in the Bajío,” reveals the director of Construction of ATTA.

The industrial micropark is located in the State highway 500, that works as a loop that link San Luis Potosí from Mexico City, and at nine kilometers of San Luis Potosí-Querétaro highway.



[www.attamicroparque.com](http://www.attamicroparque.com)

“It is a self-construction project and from the sale we will continue with another stage of construction. It is a polygon of almost nine hectares, and it is an industrial zone in which we take care that they are small and medium companies with a light vocation and with dry processes, because where we are located there are no lines of drinking water with large quantities and we do not have well. That is to say, there may be manufacturing and logistics but up to a certain size. There are six stages and stage two is almost finished”, informs Gregorio Peláez, director of Construction at ATTA.

In Mexico, according to Peláez, few real estate developers have created spaces for Tier 1, Tier 2 and Tier 3 companies, as they have concentrated on large companies with buildings and speculative parks. “But the small companies that starts with one, two, three or four workers, and by doing a good job grow, stay immersed in the colony. In all of Mexico we have residential colonies that become commercial-industrial because these small businessmen

### Industrial buildings for PyMEs

**140 INDUSTRIAL WAREHOUSES** will constitute the ATTA micro industrial park.

**61 INDUSTRIAL WAREHOUSES** of 450 m<sup>2</sup> and 79 of 220 m<sup>2</sup>

**2019** is the year in which the **COMPLETE CONSTRUCTION** of the micropark is planned.

**700 to 1,200 JOBS** will generate industrial warehouses.

**30%** is the down payment with which an **ENTREPRENEUR** can invest in an ATTA.

Source: Micro industrial park ATTA.

have grown, but did not had the real opportunity to acquire a property in industrial places that allows them to be productive, work with three shifts, have greater service opportunities such as electricity and a place to make maneuvers. In fact there was not until recently, entrepreneurs that will give an opportunity to small and medium entrepreneurs.”

He emphasizes that Mexican PyMEs generate 98 percent of the formal employment in the country and more than 40 percent of the Gross Domestic Product (GDP), however, their limited access to credit is what has prevented them from acquiring their own property. “From there, comes the market analysis to understand that big industry requires a large base of companies that supplies a lot of services and products. Each one does something very specific, but among all we form a leaf that for us, is like the symbol of what PyME means and what we constitute as an economic block, and also alludes to the concept of micropark sustainability.”

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# HUMAN CAPITAL

FOR THE  
AUTOMOTIVE  
SECTOR

THE MEXICAN AUTOMOTIVE INDUSTRY SEEKS FOR SPECIALIZED TALENT. ACCORDING TO PROMEXICO, WITH MORE THAN 100,000 GRADUATING ENGINEERS PER YEAR, MEXICO IS FORMING HUMAN CAPITAL SPECIALIZED IN ADVANCED MANUFACTURING PROCESSES, HOWEVER, THE DEMAND IS INCREASING AND IS RAPIDLY CHANGING DUE TO CONSTANT TECHNOLOGICAL CHANGES AND TO THE QUALITY STANDARDS DEMANDED BY THE ASSEMBLY PLANTS INSTALLED IN THE COUNTRY.

Services, technology and automotive are the sectors that continue demanding specialized human resources, which also possess the ability to master more than two languages and to know the cultural codes of the transnational corporations based in Aztec land.

However, the sustained growth of the Mexican automotive industry has generated a number of challenges in terms of talent, as according to experts in the matter, there is a shortage of specialized staff and foreign companies are looking for continuity in their growth plans in the country.

The Secretariat of Economy notes that Mexico has consolidated as the seventh largest producer and fourth exporter of cars, as well as one of the main investment destinations of the main car companies (light and heavy) in the world: General Motors, Ford, FCA, Volkswagen, Nissan, Honda, BMW, Toyota, Volvo Trucks, Mercedes-Benz Trucks, Audi, BMW, Mercedes-Benz, Infiniti and Kia Motors. In the business of heavy vehicles manufacturing operations are carried on by companies such as Daimler, Kenworth, Hino, Isuzu, Mercedes-Benz, Volvo, Man, among others.

The automotive sector contributes more than three percent of the national Gross Domestic Product (GDP) and 18 percent of manufacturing GDP, generates foreign exchange for more than 52 billion dollars per year, and is responsible for about 900,000 direct jobs nationwide, informs the Mexican Association of Automotive Industry (AMIA).

At this moment in time, the demand for specialized human resources for the automotive sector also represents a challenge for Mexican universities, employment exchange and human resources consultants. In fact, Eduardo Pascual, deputy director of Talent of AON Mexico, em-

The dynamism of the automotive industry in Mexico has boosted the teaching of languages such as German, Japanese, French and English, as well as the insertion in these cultures.

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LÍNEA INDUSTRIAL



phasizes in an interview that one of the recurring concerns of foreign companies is to know if there is human capital available in the country. "We as a consultant help organizations reduce the risk of failure when they enter a country where it turns out that in the end there was no technical or enough talent. Our experience from the studies we have done is that we have found that in most cases we are providing the required talent. I would say that we still lack in the segment of technical professionals and technology, however, today many universities work with several technical careers."

For the Mexican universities the automotive industry has become a focus of attention, especially for those located in States where the manufacturers have decided to settle. For example, Puebla, home of Volkswagen and Audi. In this regard, Eugenio Urrutia, Academic vice-principal of the Popular Autonomous University of the State of Puebla (UPAEP), states that "Puebla is a university city where fortunately there is a lot of talent, just as in all, channels of detection must always be improve to make it easier, especially to the new companies that think to relocated in the city. When a company arrives to any place one of the things that take more into account is the availability of talent because that greatly reduces the complexity of the startup of the facilities and the learning curves of processes and operation."

Melba Eugenia Falck Reyes, a researcher at the Department of Pacific Studies at the University Center for Social Sciences and Humanities at the University of Guadalajara (UdG), reveals that one of the objectives of the Center for Japanese Studies (Ceja), opened last September, is to identify the demands of the Japanese business sector in Mexico. "For example, with the Engineering Center at the UdG to improve, modernize and update teaching programs, which has also been a requirement of Japanese companies. Many times students graduate from engineering but do not have the necessary knowledge for the demand, so they have to train them, which represent a cost for the company. So if we work closely, we can lower that cost through an update of the programs according to the new demands, which is an area that the universities in Mexico must work on."

The researcher adds that the States of Guanajuato and Aguascalientes are in the same line in the academic area, since they have also received investment from the automotive sector. "At the UdG, in Lagos de Moreno, the CULagos has already included a degree in Culture and Languages which includes Japanese, German and English. It has just been approved."

She emphasizes that Japanese assembly plants participate with a third of the production of cars in the country, which impacts on the generation of direct jobs. "Besides to exports, of every three cars Mexico exports, one is Japanese. This is linked to the training of human resources, with quality export of high-level, hence the training of human resources is key."

## ACADEMIC AND CULTURAL EXCHANGE

One sign that the automotive industry increasingly demands specialized human resources is the increase in the offer of academic exchange programs between Mexican and foreign universities.

In the case of Japan, Melba Eugenia Falck comments that the Japanese Government is promoting the agreement between Mexican and Japanese universities. "There are 26 Mexican universities, including the University of Guadalajara, that has agreements with Japan. The UdG has more than 13 agreements and the Center for Japanese Studies has been one of the major promoters of these agreements."

The Mexican researcher says that there has been a favorable situation for Mexico because the Prime Minister of Japan, Shinzo Abe, is promoting the internationalization of Japanese universities, in a way that Japanese students can go to institutions in other countries and more students are accepted in Japanese lands. In fact, next November, a symposium of rectors from Mexico-Japan will be carried out in Hiroshima, where they will discuss how to promote exchange programs.

She concludes that the exchange of students is fundamental. "A student who goes semester to any country returns with another vision about Mexico involved in the international economy. And depending on the country, they come back with a certain knowledge of the culture and language."

It is noteworthy, that through the Global Strategy Program more than 4,000 interns have left the country and through the Ministry of Education in Japan (Monbu-kagakusho) 20 Mexican students per year go to Japan.

The Academic vice-principal of the UPAEP states that this university already operates with the future in mind, especially since they are part of the Automotive

Cluster Centre Zone (CLAUZ) in the Puebla-Tlaxcala region and the presence of Audi and Volkswagen in Puebla. "This necessarily entails our concern to train students in the German language and in the German culture. That is why, we have German courses for those students who already speak English, can do it curricular or in a voluntary way. In addition to the courses we offer, we have an agreement with Volkswagen Language Center, which collaborates training people in this language. We have also established agreements with German universities, which allow students, especially in the Automotive Design Engineering career, to make stays usually one semester, although they may be one year, in such a way that students return prepared with some subjects learned over there, but above all with a more appropriate development of the German language because it is not a simple language."

He mentions that all students of the UPAEP are forced to carry out professional practices; in the case of engineering is an average of 480 hours. "In that way, we also work directly with the industry in the sense of providing practitioners, but they provide us with a very important supplement in education."

AON Mexico's deputy director of Talent points out that one of the challenges is to identify the major trends in the economy and business to predict where knowledge and talent needs will move. "Because that's where we have to influence the universities in order to start developing that talent, so that they start to create careers that does not exist today and that are going to be necessary in a short time. We have to look to the future, seek and understand where business, production processes and, in general, human development are moving, to know what we have to do with our students to open up opportunities for them, to generate them an appetite and eventually, generate job opportunities."

We do not want people to study careers for which there are no jobs, because they are no longer needed or because they have not been created. We have to go at a very good pace with global development."

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# MULTILINGUALISM

The dynamism of the automotive industry in Mexico has boosted the teaching of languages such as German, Japanese, French and English, as well as the insertion in these cultures, explains Eduardo Pascual. "We see that companies are hiring people who are very oriented towards using the English language as a business language that has become universal. This has happened in a different way, but still with greater intensity in some regions. For example, Bajío has become a region where Japanese and Korean companies are found in the automotive sector, and from the perspective of the language the employees that are starting at least dominate English and many of them are already studying Japanese or German for companies such as Volkswagen and Audi in Puebla, that use it, spite of English being the business language these companies use. In the language part the efforts are made in an articulated way, that is to say, at the same time the companies offer language courses for their employees and they look for options, even paying them, frequently, with their own resources. From the cross-cultural perspective I would say that it adapts a lot from the individual styles that occur in organizations."

In an interview, Florence Suzanne Grolleau, dean of Language and Culture Studies at the UPAEP, reveals that in Puebla the presence of

Volkswagen and Audi has changed the dynamics in language learning. "In the world, German is not one of the most learned languages, but here it is in fact the most studied language along with French as well as English. And that we owe it exclusively, to the automotive industry that came to establish here and we have to take it into account, without a doubt. And that is why at local level we should encourage that the high school student is already learning German."

She emphasizes that there is talent but the training is needed. "In fact, that's why certain companies decides to train their workers and invest two or three years in language learning."

Werner Voigt, a research professor at the UPAEP's International Commerce Faculty, says that Mexico must generate political will to invest money in language teaching. "It is indispensable to have immediately a body of professional teachers capable of teaching English. My suggestion would be to adopt the philosophy of Saudi Arabia and the People's Republic of China, that is, to import English teachers into the public education system and pay them a living wage. In Mexico we have English teachers in elementary and high school who earn 10,000 pesos a month, which is not going to attract real talents in the teaching of foreign languages."

He says in an interview, that the big multinational companies in the automobile industry of Puebla are desperately seeking trilingual talents. "For example, Audi insists on having lawyers, here in Puebla, who are able to speak English, Spanish and German with absolute fluency, but there is simply no one. The priority at this time should be to perfect the teaching of other languages. We have already reached an adequate level in technical education, in the necessary aspects to create generations and generations of good technicians, good administrators and academics. What we are lacking at the moment and desperately is multilingualism."

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