



TAMAULIPAS

Strong and Competitive

Donna, Tx
December 2, 2015



TODOS POR TAMAULIPAS

STRATEGIC LOCATION



Land Area:
80,249 km²

Border (with USA): **370 km**

Shore Line (Gulf of Mexico): **433 km**



ECONOMICALLY ACTIVE POPULATION



Total Population: **3.5 Million**

EAP: **1.53 Million People**

Employed Population: **1.45 Million**

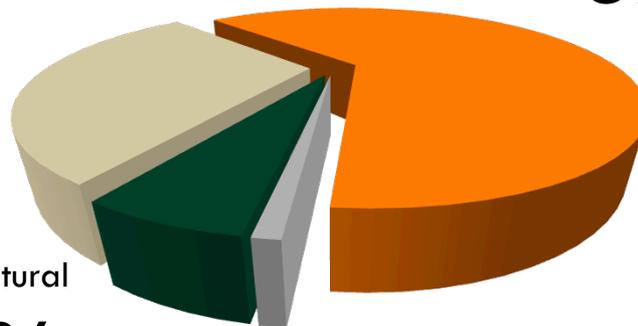


Commerce
and Services
62.3%

Industrial
30.5%

Agricultural
6.1%

Non Specified **1.1%**



LOGISTIC PLATFORM

13,986 km HIGHWAYS

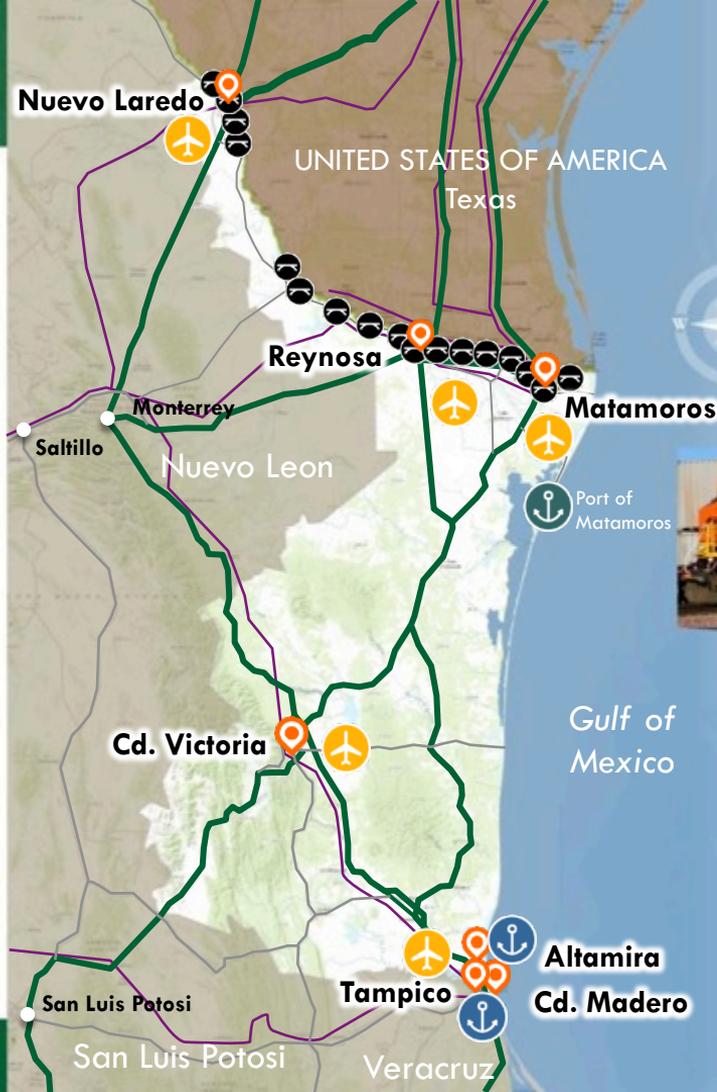
937 km RAILWAYS

5 INTERNATIONAL AIRPORTS

2 DEEP SEA PORTS

1 SEA PORT (Under construction)

17 INTERNATIONAL CROSSINGS



INTERNATIONAL CROSSING CONNECTIVITY



17 international crossings



15
Vehicular



2
Rail



ALTAMIRA & TAMPICO

13% increase in movement
height in 2014

30% commercial movement
of Mexican Region
Gulf of Mexico-Caribbean

115 connection ports

- Destinations:*
- Eastern US
 - Caribbean
 - South America
 - Panama
 - Costa Rica
 - Colombia
 - *Egypt*
 - *Middle East*
 - *Europe*
 - *Mediterranean*

	Millions Tons	(%)
Total Movement	24.1	
Imports	13.8	57
Exports	7.9	33
Cabotage	2.4	10



FOREIGN DIRECT INVESTMENT

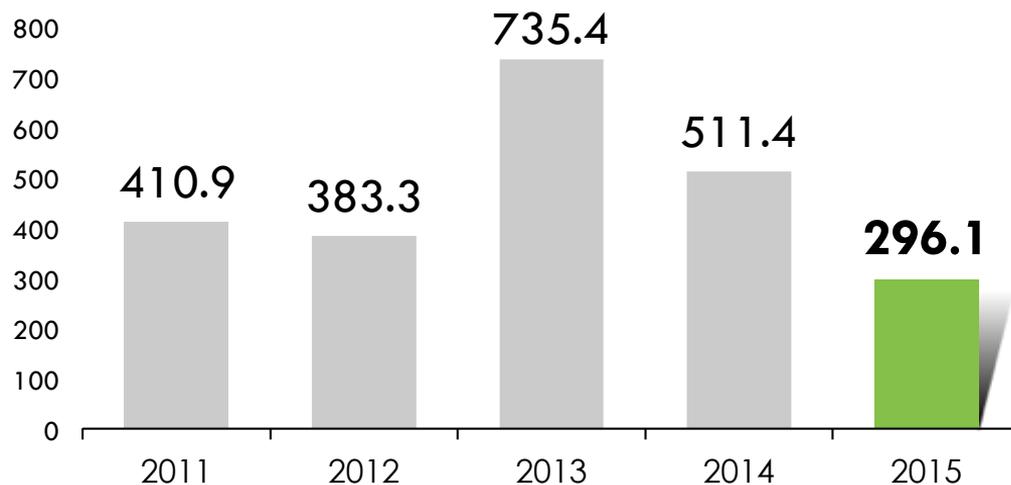
		2014 (%)
UNITED STATES OF AMERICA		84.2
NETHERLANDS		6.6
SOUTH KOREA		5.0
FRANCE		2.1
CANADA		1.4

\$6,663 US MD

796 Companies

Accumulated 1999-2015

**Investment in the last
5 years: \$2,337.1 US MD**





401
Establishment



213,824
Employment

TAMAULIPAS COMMERCE (IMPORT-EXPORT)

Nuevo Laredo-Laredo

12,000

DAILY COMMERCIAL TRUCKS consolidate the region as the most important of America foreign trade



Nuevo Laredo-Reynosa

39%

HIGHWAY FREIGHT
Import & Export 2014

\$171,400
US MD

Nuevo Laredo-Matamoros

52.2%

RAIL FREIGHT
Import & Export 2014

\$45,745
US MD



TAMAULIPAS EXPORTS

Tamaulipas state is the country's **6th largest exporter**, with exports amount of **\$ 22,943.6 US MD**



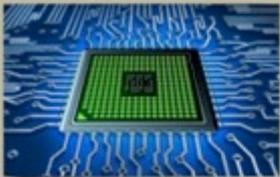
1st place

in exports of **chemical industry**



3rd place

in manufacturing **accessories, electrical and computer power generation**



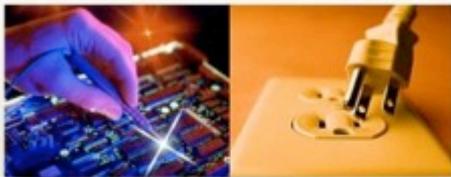
4th place

in manufacturing **computer equipment, communication, measurement and other equipment, electronic components and accessories**



SECTOR DEVELOPMENT (CLUSTER)

Electric-Electronic



Automotive



Chemical & Petrochemical



Information Technology



Logistic



Medical



Energy



Agribusiness



Tourism



AUTOMOTIVE SECTOR



120 companies

45,000 labor force



Products:

- Galvanized steel
- Sheets
- Boards
- Harness
- Brake systems
- Security systems
- Seating
- Antennas
- Tubes for air conditioning
- Cables
- Components for slings
- Radios



ELECTRIC-ELECTRONIC SECTOR



93 companies

53,031 labor force

iQOR

MOTOROLA

ALCOM

EMERSON

CORNING

BLACK & DECKER

Rheem

Microsoft

SONY

LG

PENTAIR

KEMET
CHARGED

Spellman

tyco

Products:

- Energy and ballasts
- Car radios
- Batteries
- Radio equipment
- Televisions
- Switches for electronic circuits
- Installation of electronic components
- Transformers
- Inductors
- Power supplies
- Air conditioning
- Accessories A/C
- Manufacture of power tools
- Repairing computer hard drives



CHEMICAL-PETROCHEMICAL SECTOR



42 companies

8,400 labor force

BASF
The Chemical Company

Mexico Carbon
Manufacturing

DU PONT



FLEX

MG
GRUPPO MOSSI & GHISOLTI

NHUMC

سابك
sabic

BIOFILM
BIOFILM
SOLUCIONES A LA RESIDA

STYROLUTION

Dynasol

POLIOLES

KALTEX



Mexichem

Royal
Technologies

IBERDROLA

Products:

- Terephthalic Acid (PTA)
- Dimethyl Terephthalate (DMT)
- Titanium Dioxide
- Carbon Black
- Synthetic Rubber
- Bioriented Polypropylene Film
- PET
- PVC
- ABS

In Madero City the 10.1% of the oil is refined, Altamira produce the 80% of petroleum-based resins occurs.



ENERGY POTENTIAL

SOLAR RADIATION

Average 4.8 kWh/m²



OIL IN DEEP WATER, SHALLOW WATER & LAND



BASIC & SECONDARY PETROCHEMICAL

Refining 10.1% national
60% of the country resins



SHALE GAS

Basin of Sabinas, Burgos
and Tampico-Misantla Exploration Works



WIND POWER

26 registered projects
21,000 MW



BIOFUELS

Ethanol and Biodiesel Production
1st producer of sorghum 3.1 million tons
5th producer of sugarcane 3.7 million tons



BIOMASS

Power Generation from Waste
59.1 Millions kWh/year



ELECTRICITY

2nd place in national production
33,558 GWH
13% National Generation



NATURAL GAS

Associated: 4th National Place 74.51 Millions Ft³/ day
Non Associated: 1st National Place 37.3%



TAMAULIPAS STRONG AND COMPETITIVE



Attraction of investment and job creation



- Investment Promotion
- Established Industry support
- Supplier Development



TAMAULIPAS STRONG AND COMPETITIVE

45 EVENTS TO PROMOTE NATIONAL AND FOREIGN INVESTMENT



- **Energy:** The North American Prospect Expo, NAPE, y Offshore Technology Conference, OTC, in USA
- **Autoparts:** SAE World Congress in Detroit, Michigan, USA & Automotive Meetings in Guadalajara, Jalisco, México
- **Multisectoral** Logistic Summit & Expo, Caaarem & Expo Carga in México



TAMAULIPAS STRONG AND COMPETITIVE



INDUSTRY INVESTMENT (2011-2015)



- **104** companies
- **\$25,049 MDP**



posco

Mexichem.



Joerns



Cal-Comp



TAMAULIPAS STRONG AND COMPETITIVE



INVESTMENT INDUSTRY INSTALLATION PROCESS (2015)

- **21** companies
- Investment **\$29,239 MDP**
- **3,832 jobs**
 - Automotive Parts
 - Medical Equipment
 - Precipitated silica, synthetic silicates
 - Medical Products
 - Protective metal boxes electric appliances and electronic
 - Motors and filters for swimming pools



TAMAULIPAS STRONG AND COMPETITIVE



ESTABLISHED INDUSTRY SUPPORT

- **746 meetings**
- **59 expansions & 34,593 jobs**



INCENTIVES

- **293 companies supported in strategic sectors with savings up to \$163 MDP** in staff training, economic subsidies by government procedures and payroll tax



TAMAULIPAS STRONG AND COMPETITIVE



SUPPLIER DEVELOPMENT

- **5 supplier meetings in auto parts, electric and electronic industry and energy sectors. 785 bidders and 114 companies of Maquiladora Manufacturing Industry and Export Services, Immex**
- **180 companies with direct and indirect supplies were incorporated.**





RIO BRAVO

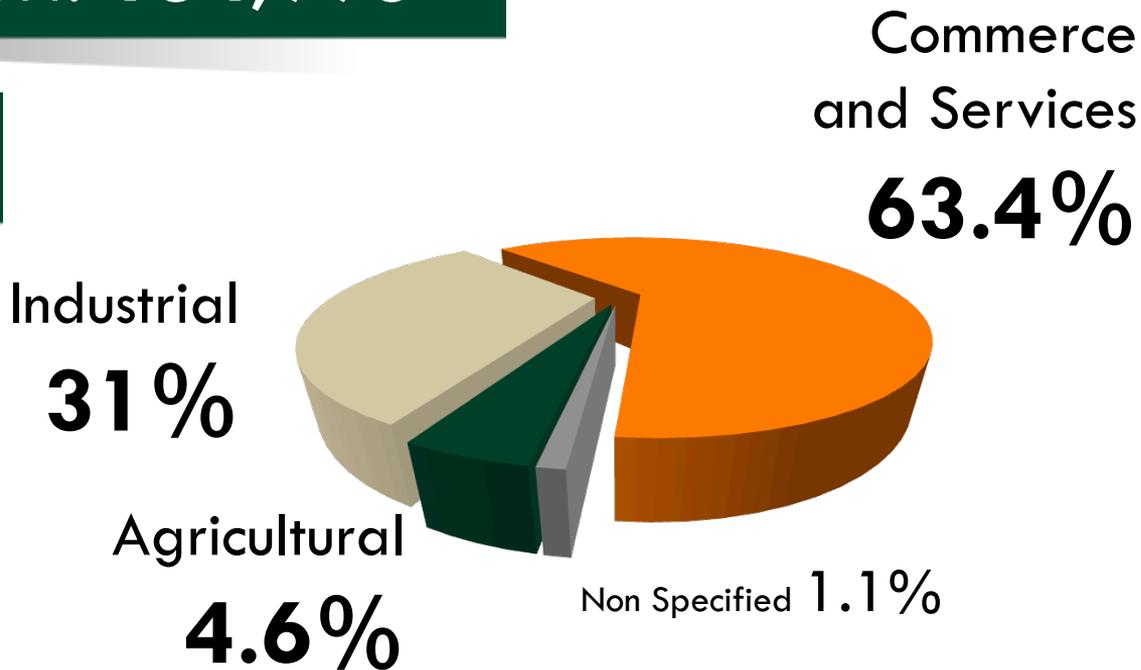
TAMAULIPAS



RIO BRAVO POPULATION

Total Population: **134,995**

EAP: **54,133**



ACTIVIDADES ECONÓMICAS

■ EMPRESAS: 4,255

Destaca: comercio al por menor, servicios de alojamiento temporal y preparación de alimentos e industria manufacturera

■ Planta de generación de energía eléctrica (511 MW)

Principales
industrias:



NORTH ECONOMIC CORRIDOR

North Economic Corridor



The economic calling of the Port of Matamoros' influence zone can be described as:

- Oil industry
- Maquiladora industry
- Agricultural production
- Fishing industry
- Production of stone aggregates
- Import of various goods

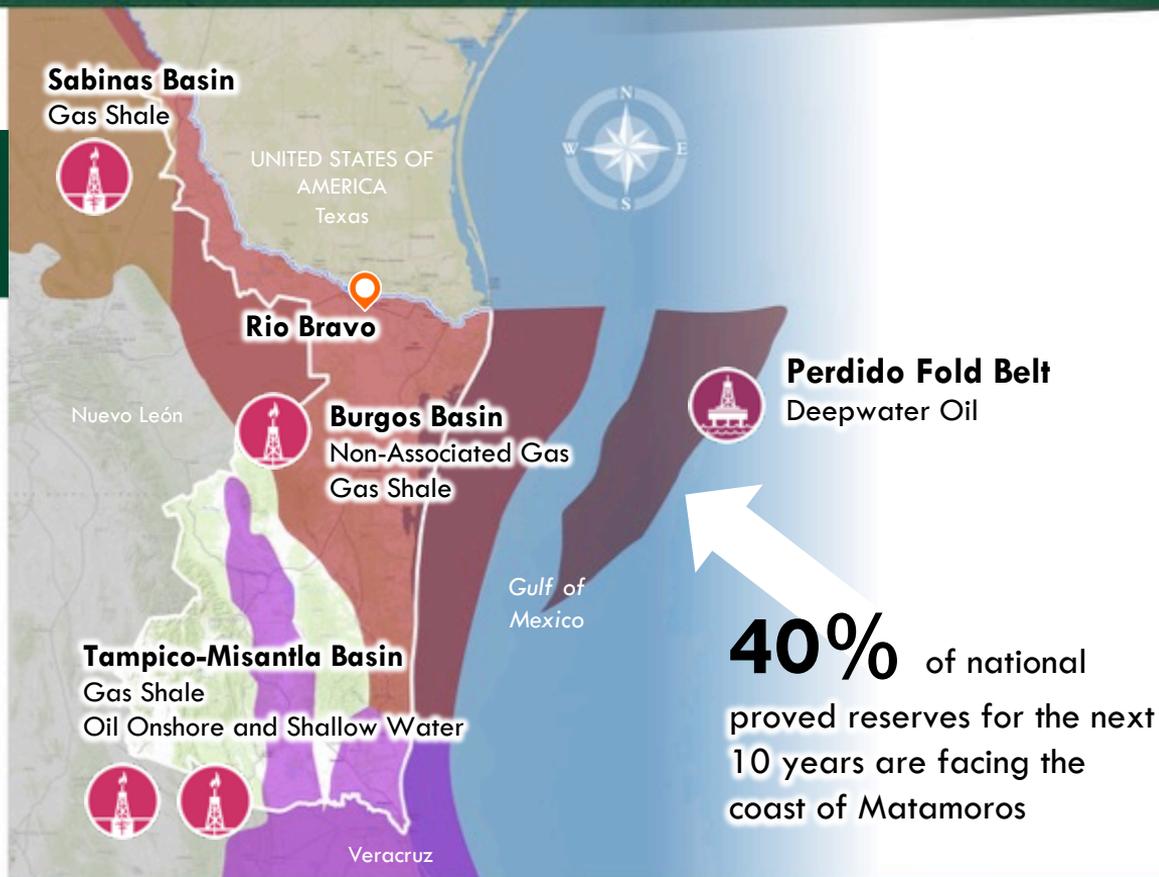


HYDROCARBONS POTENTIAL

Land Area: **80,249 km²**

59% with hydrocarbons potential

- **10 billion** Deepwater barrels
- **1st place** in Non-Associated Gas production 37.28%
- **10.1%** of domestic refining 117,500 barrels / day
- **4th nationally place** in the production of Associated Gas 74.51 million of ft³ per day



40% of national proved reserves for the next 10 years are facing the coast of Matamoros



RIO BRAVO DEVELOPMENT OVERVIEW

- **Create a new industrial development**
 - Light Industry
 - Trade Services
- **Conversion from light vehicles to cargo** in the International Río Bravo-Donna Bridge.
- **Encourage the establishment** of electric-electronic, auto parts and energy sectors
- **Binational Promotion** Río Bravo-Donna





Tamaulipas

GOBIERNO DEL ESTADO

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