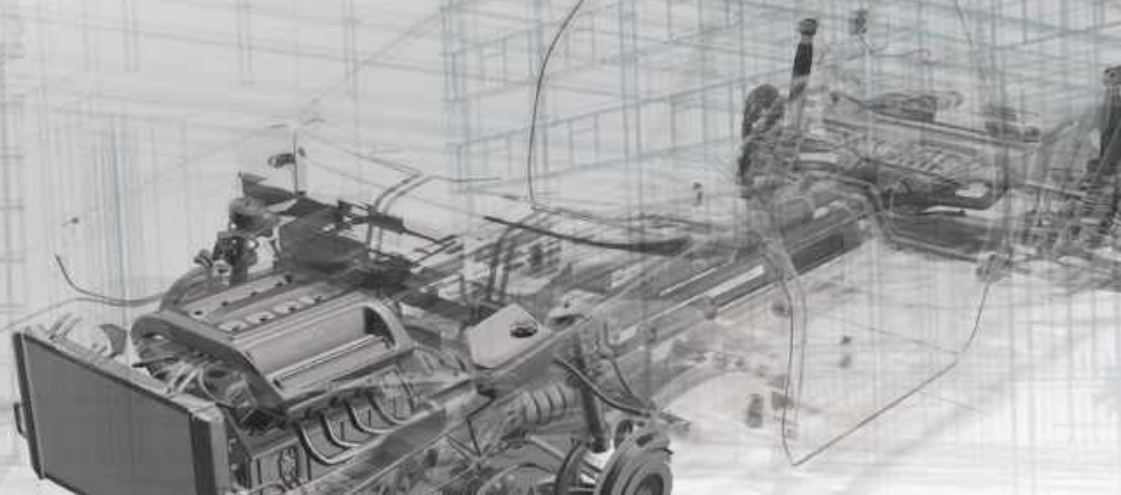


INDUSTRY IN TLAXCALA, MEXICO



TLAXCALA
CONSTRUIR Y CRECER JUNTOS
GOBIERNO DEL ESTADO 2017-2021





Tlaxcala has initiated a new stage of industrialization. We are one of the best well connected and safest states in Mexico, with an average annual employment growth rate over 8 percent.

We have the necessary infrastructure and strategic geographic location in the center of the country that grant us access to the huge consumers market of Puebla City and Mexico City, as well as their international airports, which are the main access points for supplies and goods, including Veracruz maritime port, which is the busiest in the Mexican Republic.

We are part of the Puebla-Tlaxcala metropolitan area, one of the most economic developed areas in the Americas, which is currently distinguished by the boom of the automotive industry. With attitude and decisiveness, we have took advantage of our regional potential to be more competitive and foster the growth of other important sectors such as chemical, textile and tourism, with a vision that favors the linkage between the productive and educational sectors.

Our Entity holds a vocation of integration with Mexico that we want it to grow towards the world. We count with an orderly public administration, stable, and without debt, that is focused on remove obstacles, solve problems and to promote productive projects in order to accompany business community, diversify the investment and to consolidate the business environment that fosters the opening of new job sources.

We live in times of reforms that open opportunities, and in Tlaxcala we recognize the possibility to join the international trends and show the world how proud we are of being who we are: A great state which generates value and wealth.

Marco Mena

Governor of the State of Tlaxcala

STRATEGIC SECTORS IN TLAXCALA

Automotive

Metal-mechanical

Textile and clothing

Chemical and petrochemical

Building products

Food industry

Wood products

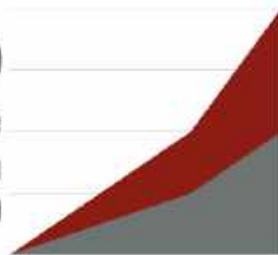




AUTOMOTIVE SECTOR

The state of Tlaxcala has been important for automotive industry, 13 countries have invested in this sector, giving a total amount of 49 companies of this field, 29 of them are direct suppliers (TIER 1) of main OEMs.

50%
of the companies are
new investments from
2011 to 2019



29 TIER 1

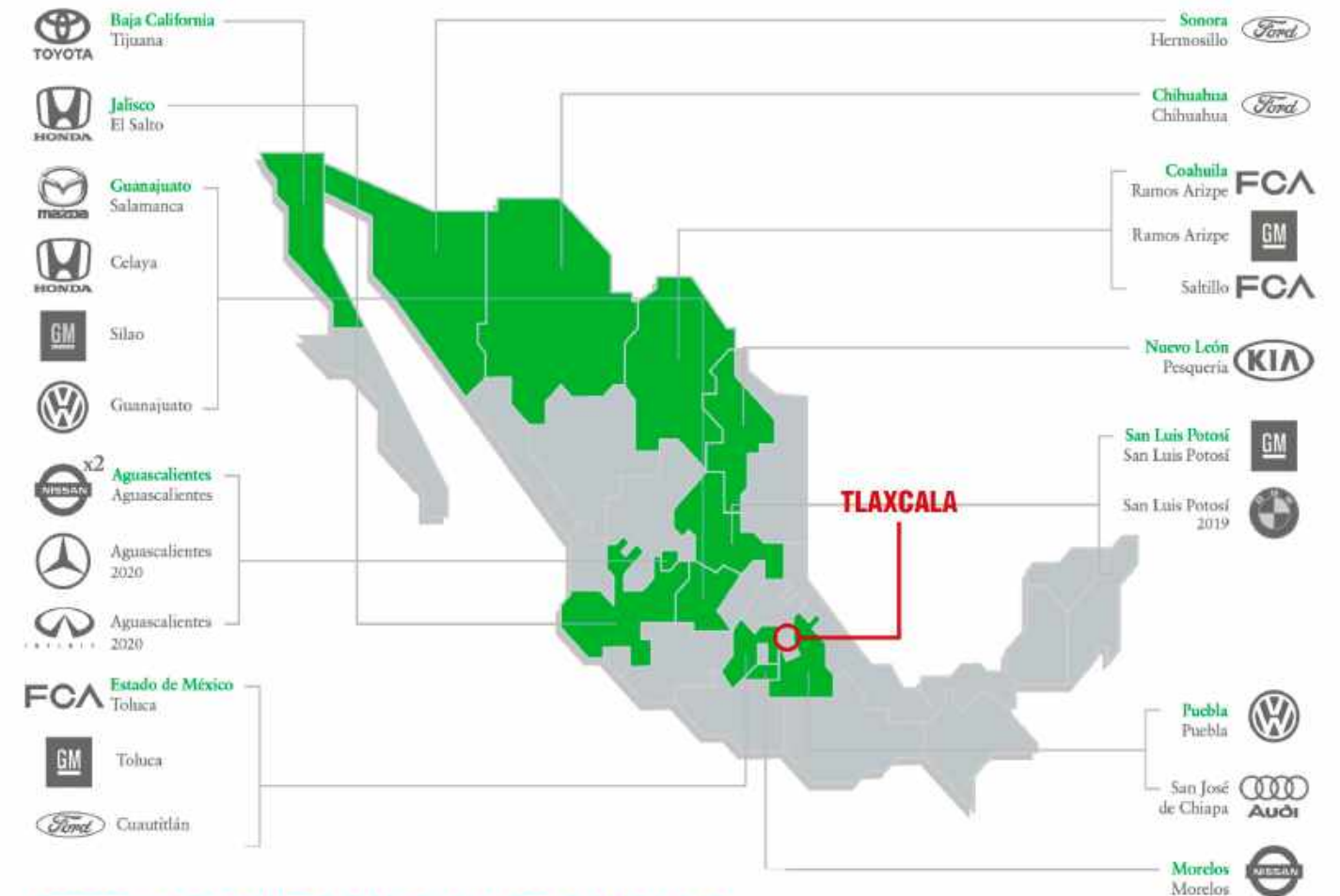
18 TIER 2

2 TIER 3

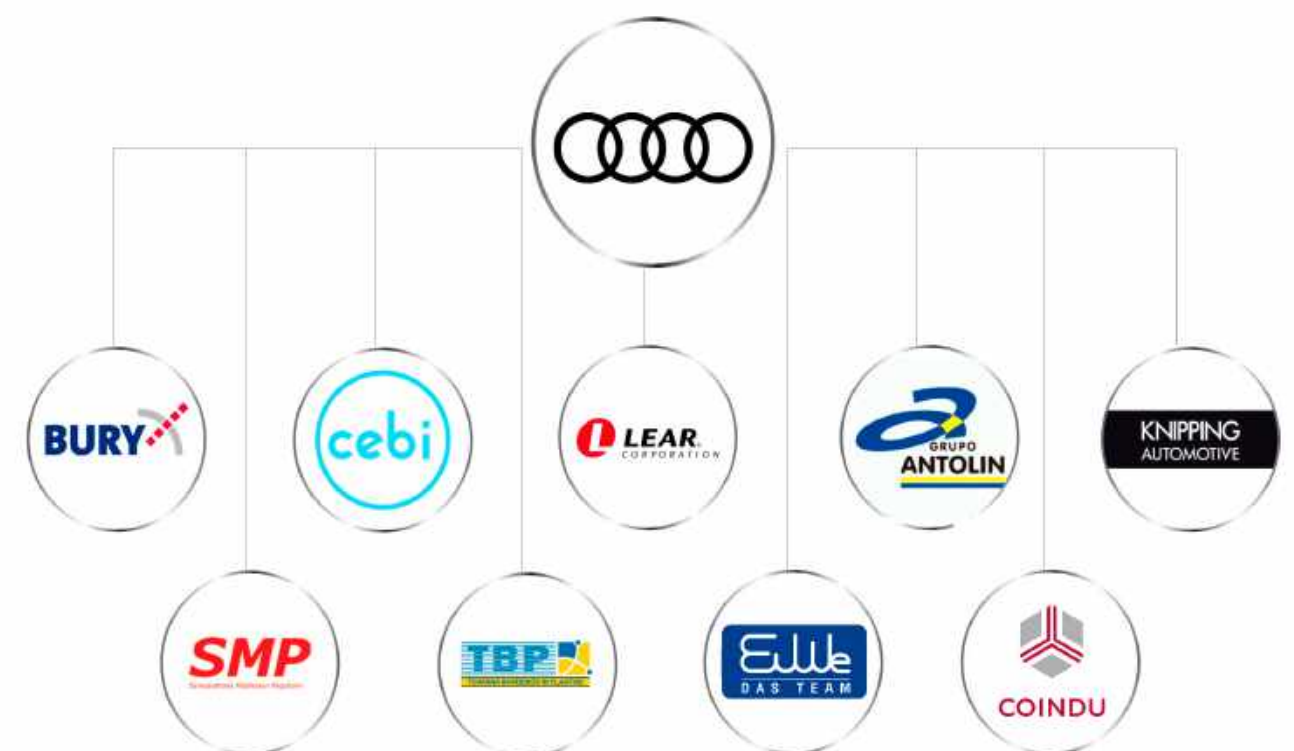
Countries with direct investment in Tlaxcala

GERMANY	
AUSTRIA	
SLOVENIA	
SPAIN	
UNITED STATES	
INDIA	
ITALY	
JAPAN	
LUXEMBOURG	
SWITZERLAND	
POLAND	
PORTUGAL	
CHINA	

LIGHT VEHICLES MANUFACTURING PLANTS IN MEXICO



TIER 1 COMPANIES IN TLAXCALA



TIER 1 COMPANIES IN TLAXCALA



ARCOMEX

EUWE EUGEN WEXLER DE MÉXICO

INTERAUTO SUNSHADE AND PLASTIC DIVISION

ISI AUTOMOTIVE DE MÉXICO

JOPP AUTOMOTIVE DE MÉXICO

SE BORDNETZE – MÉXICO

INTEMEC

SONAVOX

KATHREIN

BM PLASTIC



HONDA

SCHLEMMER



BURY-TLAXCALA

COINDU MÉXICO



GLOBAL FLOCK DE MÉXICO



DARANJO MÉXICO

ADIENT / JOHNSON CONTROLS



EUWE EUGEN WEXLER DE MÉXICO

GRAMMER AUTOMOTIVE PUEBLA

ADIENT / JOHNSON CONTROLS

KATHREIN



Mercedes-Benz

EISSMANN AUTOMOTIVE GROUP



FIAT CHRYSLER AUTOMOBILES

LEAR CORPORATION



EUWE EUGEN WEXLER DE MÉXICO

SMP AUTOMOTIVE SYSTEMS MÉXICO



METAL-MECHANIC SECTOR

In 2020 Tlaxcala, will go from the fifth to the third place in the production of long steel nationwide. During 2016, Tlaxcala registered through the IMMEX program (Manufacturing Industry, Maquiladora and Export Services) and the Tariff Preference Level quotas, export sales of steel for 27.8 million dollars made by tlaxcalan companies. This was informed by the Delegation of the Secretariat of Economy (SE) in the State.

Representative companies



SIMEC GROUP

Special steel for the automotive industry, structural profiles, commercial profiles and steel rod



GREENBRIER

Rail freight cars (gondola and tank car)



TREFILADOS INOXIDABLES DE MÉXICO

Bars and wires of stainless steel, special welding of alloys



SCHNEIDER ELECTRIC

Transformers, switches, cabinets, control boards



FETSA

Transformer tanks, habitats for petrochemical industry



TEXTILE AND CLOTHING SECTOR

In the sixties, this sector was the backbone of the State, nowadays is the second industry with the main contribution to the State's Gross Domestic Product. According to INEGI (National Institute of Statistics and Geography), 18% of employed personnel in Tlaxcala work in that business.

Representative companies



PROVIDENCIA
BED COVERS WITH DISNEY
EXCLUSIVITY LICENSE



ANTEXTEXTIL
THREADS FOR THE
AUTOMOTIVE INDUSTRY



BEKAERT
MATTRESS FABRICS



ZENTRIX
MANUFACTURE OF
SPORTSWEAR



GALIA TEXTIL
TEXTILE PRODUCTS FOR
HOSPITALS



CHEMICAL AND PETROCHEMICAL SECTOR

The chemical industry of the state holds the 16th place in production of chemicals nationwide. In Tlaxcala it represents 14% of manufacturing industry GDP, and 3% of nationwide industry. Plants located in the state count with prominent research and development departments, generating projects of innovation and technological development. This sector is transversal and it counts with capabilities and solutions that impact other sectors, specially to textile, automotive and food industry.

Representative companies



BAYER DE MÉXICO
CROP SCIENCE DIVISION
Biofungicides and biopesticides



DOW CHEMICAL
Polyurethane solutions,
biofungicides and biopesticides



RESIRENE
Synthetic resins



MEXICHEM
Synthetic resins and PVC compounds



BISSÚ
Cosmetics

BUILDING PRODUCTS

Tlaxcala is an expert in the production of concrete sleepers, mold making, production of slabs and alveolar walls, as well as the manufacture of ceramic products, porcelain slabs and bathroom furniture.

REPRESENTATIVE COMPANIES



ITISA

Concrete sleepers, prefabricated structures, and concrete elements



PORCELANITE LAMOSA

Tiles and slabs



OWENS CORNING

Fiberglass fabric



AMERICAN STANDARD

Bathroom furniture



NOVACERAMIC

Extruded bricks for walls and roofs, and slabs

AGROINDUSTRY SECTOR



On March 2017, Tlaxcala was the second state with the highest funding growth within the agricultural and livestock sector nationwide, with a rise of 1,694% of credits, only behind Nuevo León which is ranked in first place.

Representative companies



CEBADAS Y MALTAS

Malt for brewing industry, it is part of Modelo Group



LA MORENA

Chiles in vinegar, sauces, purée, canned beans



Café Punta del Cielo
El Gran Café de México.

CAFÉ PUNTA DEL CIELO

Roasting and packaging gourmet coffee



DRISCOLL'S

Strawberries and other berries



AGROMAS

Balanced feed for animals, member of Gruma Group



DXN

Food supplements based on ganoderma fungus

WOOD PRODUCTS SECTOR

Specifically located in the northern region of the State, sawmills are essential in the economic development of the population while taking care of ecosystem that surrounds it.

The production of wood is strong and demand of main furniture manufacturers companies of central area of the country is growing.

Representative companies



Kimberly-Clark de México

KIMBERLY-CLARK
DIAPERS AND WET WIPES



HEXÁGONOS MEXICANOS
CARDBOARD-BASED PACKAGING



CELULOSA DE
FIBRAS MEXICANAS, S.A. DE C.V.

CELULOSA DE FIBRAS MEXICANAS
DIFFERENT TYPES OF PAPER AND
WITH DIFFERENT GRAMMAGES

COMPETITIVE ADVANTAGES

Security



Labor stability



Personalized attention



Strategic location



Infrastructure



Qualified labor force

SECURITY

Tlaxcala occupies first positions in national security indexes:

Second national place with lower criminal incidence.

National Observatory on Citizen Security, Justice and Legality (ONC).

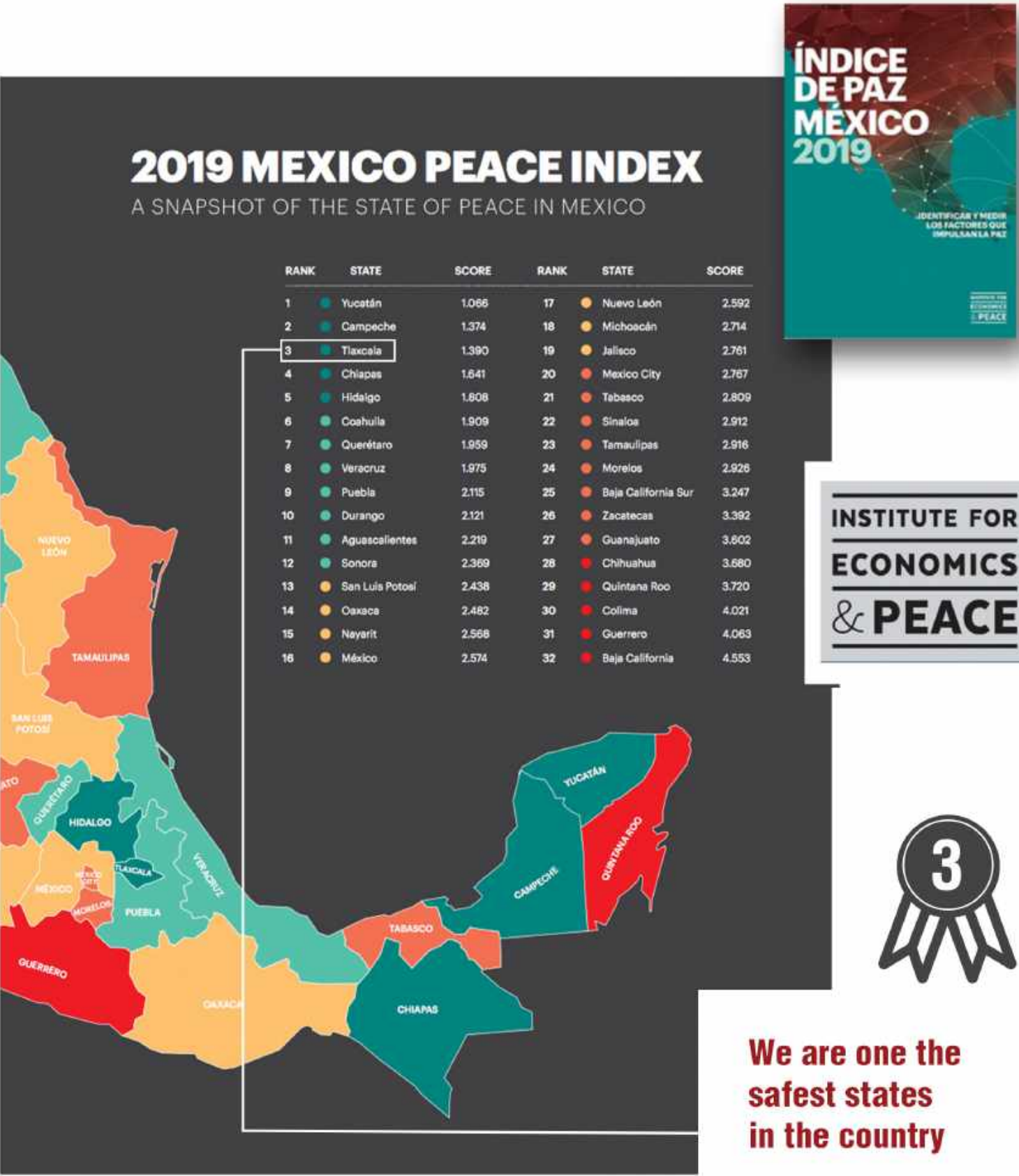
Safety perception rate (National Institute of Statistics and Geography).

National Public Safety Survey (National Institute of Statistics and Geography).

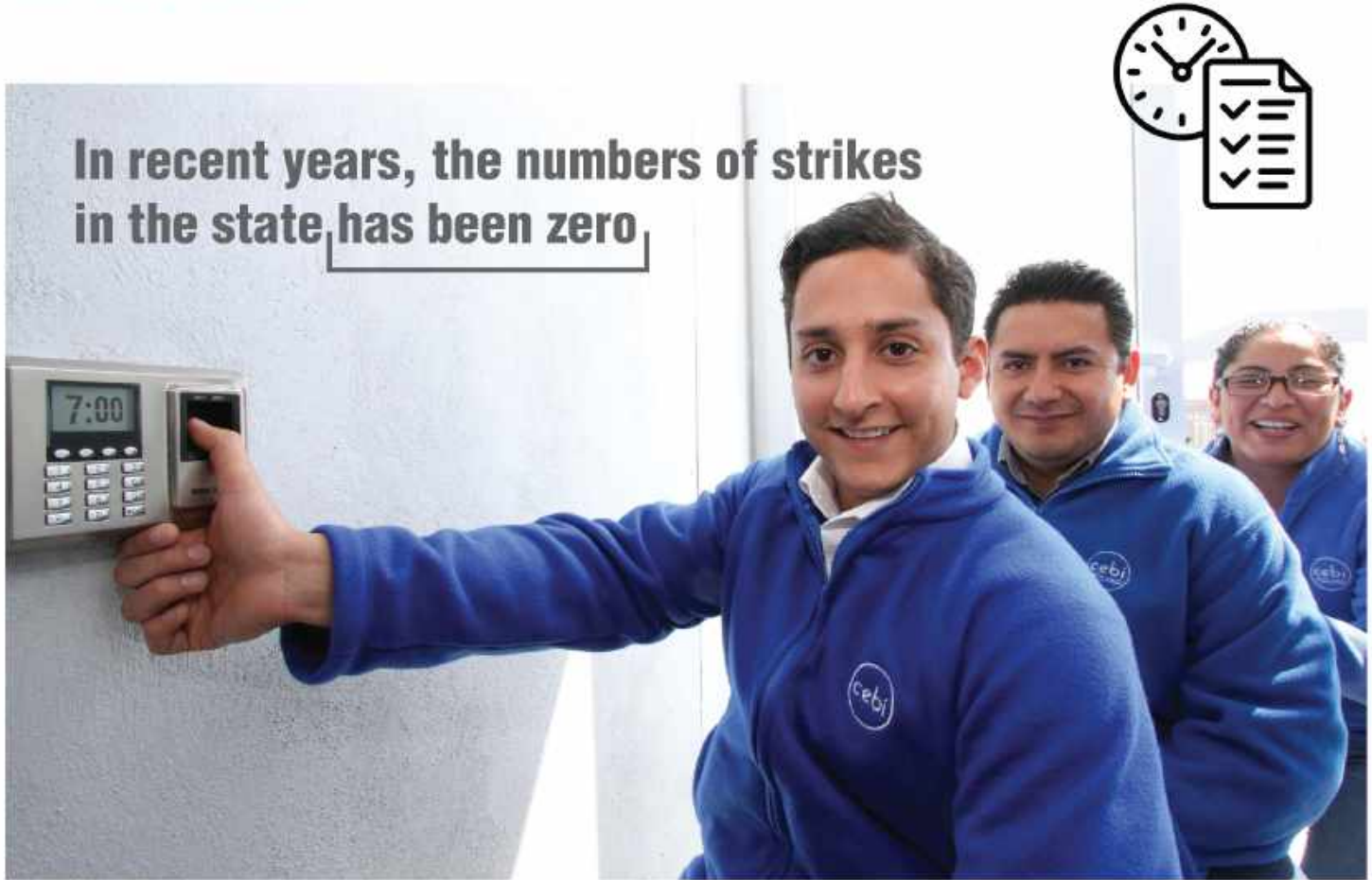


From 2013 to 2016, according to the American Chamber Mexico, Tlaxcala was the second state with the least challenges in terms of business security.

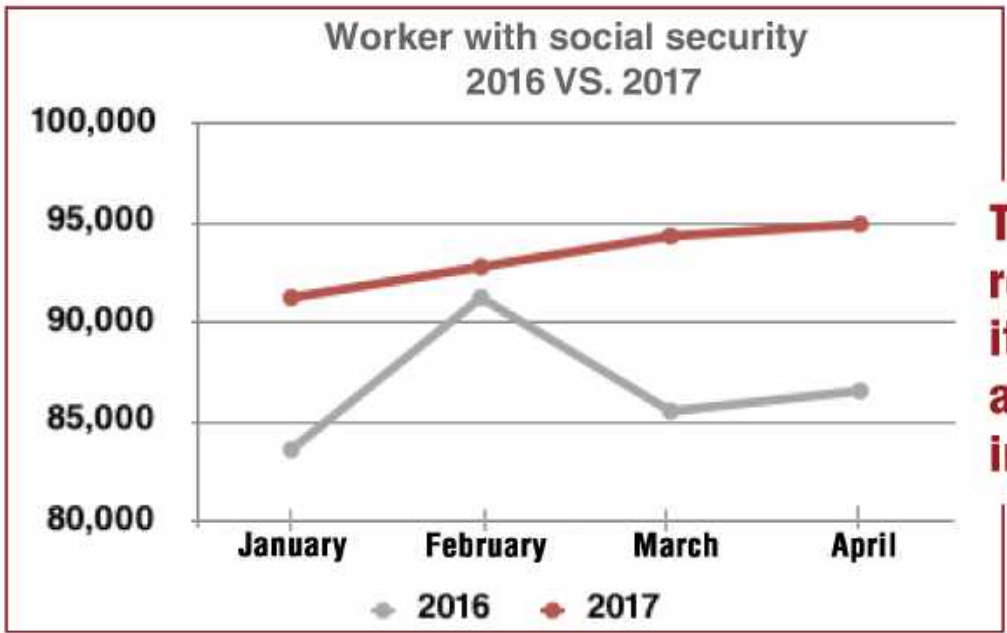
Mexico Peace Index



LABOR STABILITY



During 2017, Tlaxcala has occupied the first places at national level in terms of percentage growth of jobs generated.



1
Tlaxcala registered its highest annual growth in 2017

Source: own elaboration with data of Mexican Institute of Social Security

PERSONALIZED ATTENTION



STRATEGIC LOCATION

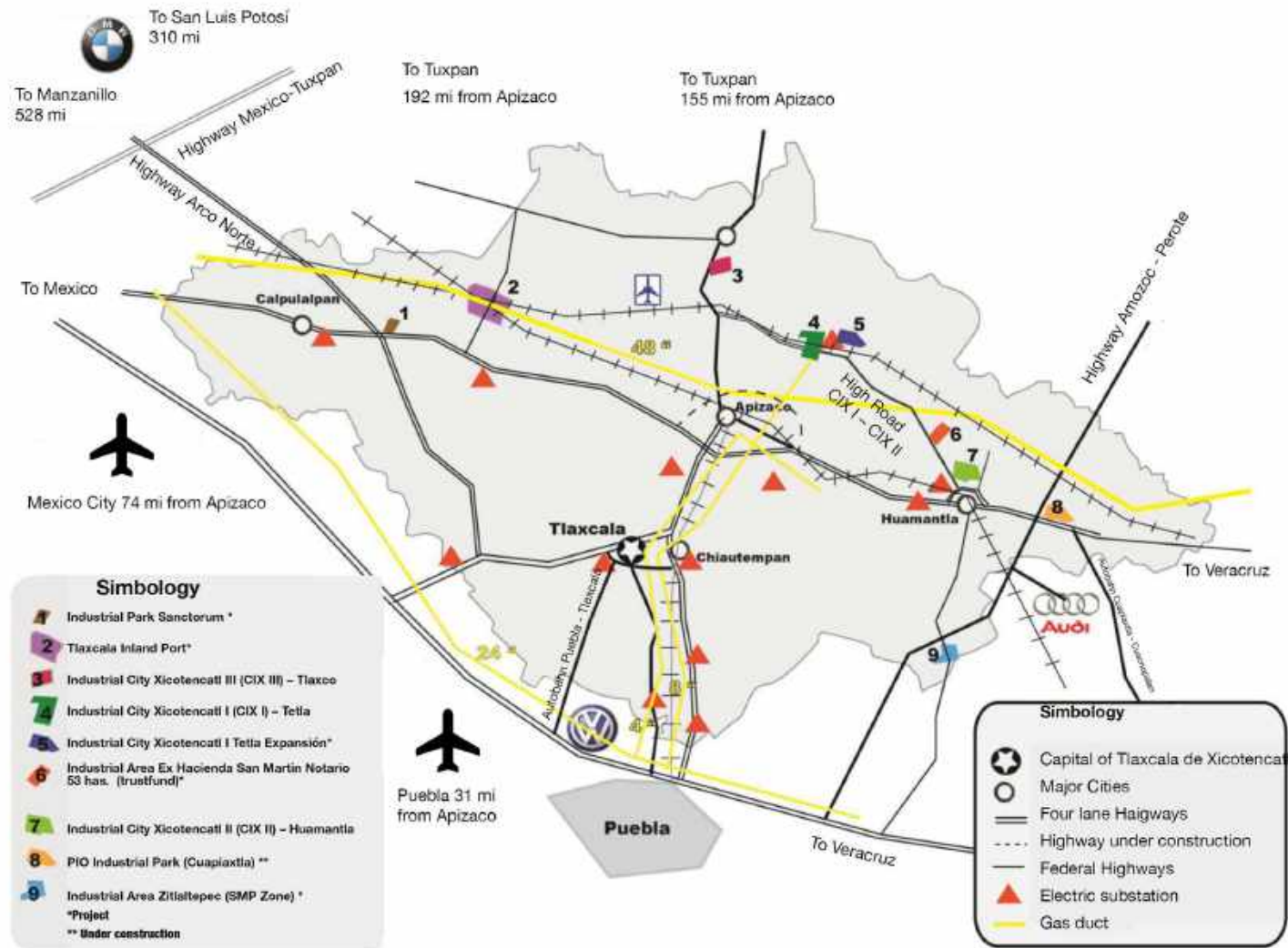


The metropolitan zone of Valle de México has a potential market of 21 million people and produces 17% of GDP.

INDUSTRIAL PARKS IN TLAXCALA



INFRASTRUCTURE



INDUSTRIAL PARKS

Our geographic location, industrial parks well connected to the main OEM's of the region, the closeness with airports and seaports, had turned us into **one of the most attractive destinations for investors.**

INDUSTRIAL CITY XICOTÉNCATL I (CIX I) - TETLA

INDUSTRIAL CITY XICOTÉNCATL II (CIX II) - HUAMANTLA

INDUSTRIAL CITY XICOTÉNCATL III (CIX III) - TLAXCO

INDUSTRIAL DEVELOPMENT ZITLATÉPEC

VESTA PARK TLAXCALA I

PARQUE INDUSTRIAL DE ORIENTE (PIO)

PRIVATE PARKS



TLAXCALA
CONSTRUIR Y CRECER JUNTOS
GOBIERNO DEL ESTADO 2017-2021

**INDUSTRIAL ZONES MANAGED
BY THE STATE GOVERNMENT**

INDUSTRIAL CITY XICOTÉNCATL I (CIX I) - TETLA



INDUSTRIAL CITY XICOTÉNCATL II (CIX II) - HUAMANTLA



INDUSTRIAL CITY XICOTÉNCATL III (CIX III) - TLAXCO



VESTA PARK TLAXCALA I



INDUSTRIAL DEVELOPMENT ZITLALTEPEC



PARQUE INDUSTRIAL DE ORIENTE (PIO)



INVESTMENTS IN TLAXCALA DURING THE PRESENT ADMINISTRATION

Aceros Especiales Simec Tlaxcala, S.A. de C.V.
Lear Mexican Tream Operations, S. de R.L. de C.V.
Grupo Antolin Tlaxcala, S. de R.L. de C.V.
Kimberly Clark de México, S.A. de C.V.
Convertidora de Papel, S.A. de C.V.
México Sonavox Electronics Co., S. de R.L. de C.V.
Aceros del Toro, S.A. de C.V.
Exfarma, S.A. de C.V.
Engie S.A.
Lohr México, S.A. de C.V.
Kromberg & Schubert México, S. de R.L. de C.V.
Ensamblés Bancor, S.A. de C.V.
Industrias BM de México S.A. de C.V.
DXN México, S.A de C.V.
EGP Magdalena Solar, S.A de C.V. (Enel Green Power)

TOTAL INVESTMENT: AROUND 1290 MILLION DOLLARS



QUALIFIED LABOR FORCE POPULATION AND WORK FORCE



Population: 1,336,516 inhabitants



Economically Active Population:

603,336 inhabitants



Mean age:

26 years old



Population density:

318 inhabitants per square kilometer



EDUCATIONAL OFFER - UNIVERSITIES



EDUCATIONAL OFFER – FOCUSED IN THE AUTOMOTIVE SECTOR



Bachelor's degrees:

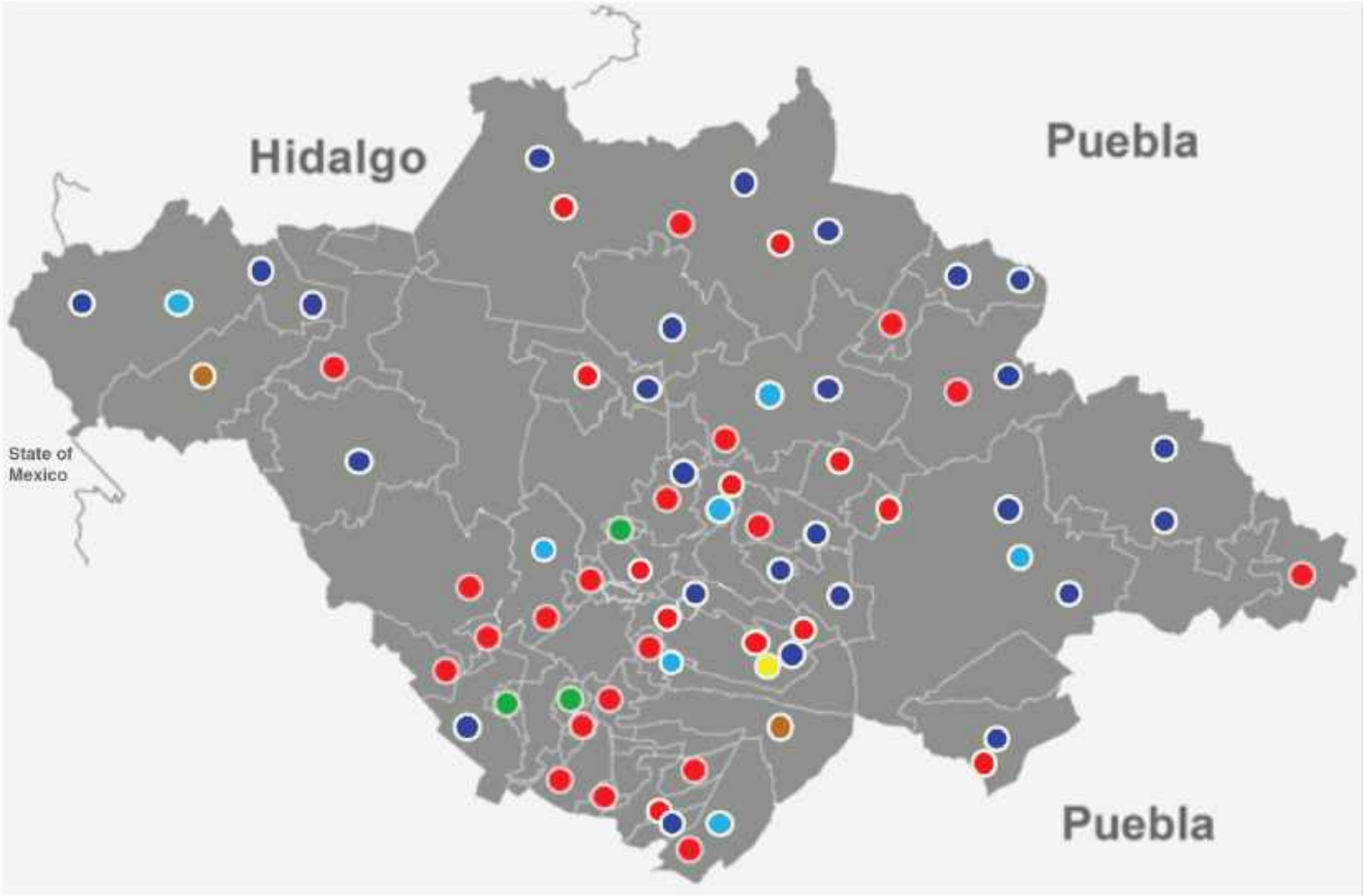
- Automotive Maintenance
- Machines and Tools
- Internal Combustion Engines
- Automotive Mechanic
- Mecatronics
- Automotive Electronics
- Automotive Processes



Professional Technician with Specialty in:

- Diesel Motors of Internal Combustion
- Industrial Engineering
- Engineering Materials
- Electromechanical Engineering
- Technotronic Engineering



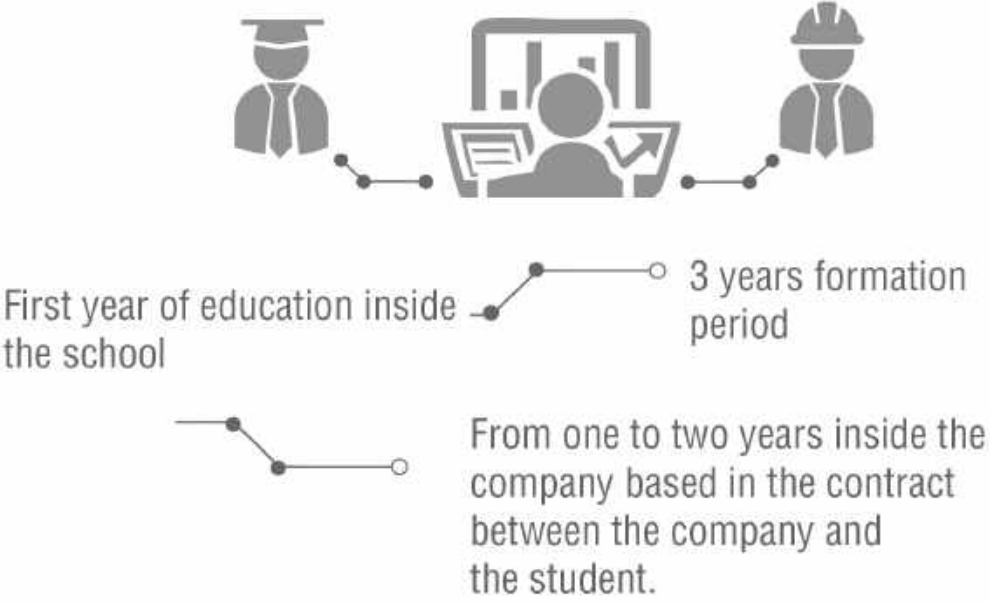
EDUCATIONAL INSTITUTIONS –TECHNICAL LEVEL



	 <div>Centro de Bachillerato Tecnológico Industrial (CBTIS)</div>	7		 <div>Centro de Estudios Científicos y Tecnológicos del Estado (CECYTE)</div>	32
	 <div>Centro de Estudios Tecnológico Industrial y de Servicios (CETIS)</div>	1		 <div>Centro de Educación Media Superior a Distancia (EMSAD)</div>	26
	 <div>Centro de Bachillerato tecnológico Agropecuario (CBTA)</div>	2		 <div>Colegio Nacional de Educación Profesional Técnica (CONALEP)</div>	3

MEXICAN MODEL OF DUAL FORMATION

TRAINING INSIDE THE COMPANIES AND SCHOOLS



► BENEFITS FOR THE COMPANY

- 1 Training of qualified personnel and certification in specific profiles.
- 2 Reduced training costs.
- 3 Low turnover of employees and optimization of time.
- 4 High productivity.



CONACYT CONSORTIUM

The Government of the State of Tlaxcala and CONACYT managed to develop the creation of the Research and Innovation Consortium of the State of Tlaxcala, with the objective of increasing the competitiveness and productive efficiency of companies in the automotive, chemical and textile sectors, in order to generate new knowledge on priority sectors and to build alliances with the industry of the State, articulating innovative and low environmental impact processes.



Applied Chemical Research Center (CIQA)

Chemical
Polymers
Advanced materials
Bio-technology
Environment



National Institute of Astrophysics, Optics and Electronics (INAOE)

Computational sciences
Artificial intelligence
Project engineering



Mexican Corporation of Research in Materials (COMIMSA)

Project engineering
Metal-mechanic manufacture engineering
Environmental engineering
Materials engineering



Center for Research and Technological Development in Electrochemistry (CIDETEQ)

Bio-electrochemistry
Nanotechnology
Electrochemistry engineering
Water treatment



Applied Innovation Center in Competitive Technologies (CIATEC)

Automotive testing services
Environmental impact analysis

AUTOMOTIVE CLUSTER CENTRAL ZONE (CLAUZ)



On April 21st 2017, with an investment of four million pesos, authorities from the Government of the State of Tlaxcala and Puebla signed the constitution of the Automotive Cluster Central Zone, which has the objective of strengthen the auto parts industry in the region and its funding members were: Volkswagen and Audi.





KATHREIN – GERMAN CAPITAL

"The strategic geographic location of the state widely benefits Kathrein's business, thanks to its easy access to the main ports of the country and the closeness with the OEM's. The Government of the state has been crucial for the installation and the operation of our plant, thanks to the efficient communication between the different Government institutions"

MARIO ENRIQUE SERRANO GARCÍA
DIRECTOR OF OPERATIONS - KATHREIN MOBILCOM
MÉXICO, S. DE R.L. DE C.V.

FERPER SPRINGS - ITALIAN CAPITAL

"The follow up from the Secretariat of Economic Development has been fantastic, beyond my expectations. I have been a plant manager in other states of the Republic and the administrative proceedings and permits take months to obtain, here in the other hand, with a phone call or with a visit to their offices you can solve them in a couple of days"

"Eagerness to learn, commitment and well established theoretical basis make the labor force of Tlaxcala easy to train"

GIANFRANCO M. PESENTI
PLANT MANAGER - FERPER SPRINGS DE MÉXICO,
S. DE R.L. DE C.V.



SONAVOX - CHINESE CAPITAL

"The Chinese delegation had various options to install its plant; Querétaro, Puebla, State of México, etc., and where we felt at home the most is Tlaxcala, here we had a personalized attention from the Government of the State"

FLORIAN HANFT
PLANT MANAGER - MEXICO SONAVOX
ELECTRONICS CO., S.A. DE C.V.



TLAXCALA
CONSTRUIR Y CRECER JUNTOS
GOBIERNO DEL ESTADO 2017-2021

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