Government procedures and services available to foreign investors and businesses will now become more accessible and simpler according with Mexico’s most recent trade developments. The Six Comprehensive Strategies outlined on May 30, 2014, by President Peña Nieto included a new “single window” for the health sector in order to promote exports by eliminating up to 80% of the regulatory burden on exporters. President Peña Nieto underlined Mexico’s role in promoting the export of foodstuff, supplements, cosmetics, and agrochemicals. The single window falls within the ambit of the second of the Six Strategies; namely accelerating economic growth by removing barriers as well as supporting entrepreneurs and small and medium-sized enterprises.

Mikel Arriola, Federal Commissioner for COFEPRIS, emphasized that 70,000 small and medium sized companies, which represent 5% of Mexico’s Gross Domestic Product (GDP), will witness an increase in revenues, sales, and overall improvement. Moreover, entrepreneurs and businesses will have the opportunity to save up to 2 billion of pesos in the next five years as the single window allows for an easier administrative process.

Since its implementation, the single window continues to significantly reduce trade timeframes. This new tool is part of Mexico’s efforts to reduce and improve regulatory proceedings in order to promote a more competitive export sector. In fact, all businesses will enjoy a 90% decrease in

Source: US Census Bureau, Statistics Canada and BANXICO

Value = US billion dollar

*Advanced Technology Products, US Census Bureau, Foreign Trade Division
their administrative work burden, which is expected to be reduced from 20 hours down to 2 hours. From Sonora to Chiapas, all thirty-one states (and Mexico D.F.) are expected to benefit from the single window. This complements some of the other economic strategies that are being implemented across Mexico. In particular, the CCE President, Gerardo Gutiérrez, highlighted the importance of deregulating the economy, not least the health sector, in light of the fact that the commercial value of export products regulated by the Commission increased to $83.3 billion. This figure accounts for 22% of Mexico’s total export of domestic products. Likewise, the strategic framework is being implemented to achieve the elimination of trade and export barriers will involve accrediting certificates of free sales and exports, valid from one to five years. This strategy has already been proved to be successful in its operations, as the federal government has issued 720 certificates for free sales and 80 certificates for exports.

Companies in the health sector are confident that exports of products regulated by the Commission will increase to nearly $159 million. President Peña Nieto has affirmed that because of the complexity, depth, broad scope, and speed of this reform, we cannot fully appreciate the benefits that are still to come and that will no doubt strengthen Mexico’s role as a world trade competitor.

Mexico Advances on Intellectual Property Protection

Mexico is advancing on the approval and implementation of an ambitious reform agenda, making countries around the world look at Mexico for inspiration to modernize their economies. Mexico’s forward-looking approach to intellectual property protection and, in particular, the leadership shown on the use of legal software in Mexico, are all examples of what is being accomplished. This work will drive real benefits to Mexican citizens, businesses and the economy, and such policy will foster further innovation.

In this regard, Mexico’s efforts to strengthen software user compliance with the law have been recognized by important software industry associations. Last June, the BSA | The Software Alliance, the leading advocate for the global software industry, awarded a Verafirm certification to SAT, Mexico’s tax authority, for its proactive and pioneering leadership.

Verafirm is a branded Certification for Organizations that have implemented International Standardization Organization (ISO) aligned software asset management (SAM) practices. Thus, Verafirm certifies that SAT has strong IT governance and is compliant with its software license agreements – and that its SAM processes are aligned to the ISO standard. This is a remarkable distinction for SAT best practices.

SAT is the first tax authority in the world to be awarded Verafirm Certification status. SAT’s impressive efforts in implementing best-in-class practices will cover a network of 38,000 machines in 31 states and the federal district.

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Unlicensed Software Installation Rate in Mexico

![Image](image_url)

Source: The Software Alliance and INSEAD eLab

Unlicensed Software Installation Rate in Mexico

<table>
<thead>
<tr>
<th>Year</th>
<th>61%</th>
<th>60%</th>
<th>57%</th>
<th>54%</th>
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<tbody>
<tr>
<td>2007</td>
<td></td>
<td></td>
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<tr>
<td>2009</td>
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<tr>
<td>2011</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>2013</td>
<td></td>
<td></td>
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<tr>
<td>2013</td>
<td></td>
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</tr>
</tbody>
</table>

Source: The Software Alliance and INSEAD eLab

### Estimated Economic Impact of Increase software use

<table>
<thead>
<tr>
<th>MEXICO</th>
<th>Licensed Software</th>
<th>Pirated Software</th>
<th>Value Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>GDP benefit: from a 1% increase in software use ($US M)</td>
<td>693</td>
<td>347</td>
<td>347</td>
</tr>
<tr>
<td>GDP return: from $1 invested in software use ($US)</td>
<td>74</td>
<td>28</td>
<td>46</td>
</tr>
</tbody>
</table>

Source: The Software Alliance and INSEAD eLab
NEWS on the U.S.-Mexico Cross-Border Trucking Pilot Program

On July 28th, 2014 FMCSA’s Motor Carrier Safety Advisory Committee’s (MCSAC) subcommittee on the U.S.-Mexico Cross Border Long Haul Trucking Pilot Program held a public hearing. The testimony suggests the three-year cross border pilot program will show Mexican carriers fully-qualified and capable of operating safely and in compliance with US laws and regulations.

NAFTA Related Events

ELECTRICÓN 2014
October 8th – 10th, 2014
Trade show for the Electrical Construction Industry.
Location: Expo Guadalajara. Guadalajara, Jalisco
Phone: 52 (33) 1812-4458, 52 (33) 1812-4459
E-mail: contacto@electricon.com.mx
Website: http://www.electricon.com.mx/

FIMODA 2014
October 16th- 18th, 2014
Exhibition for the fashion and apparel industry, offering products from manufacturers in the State of Guanajuato.
Location: Poliforum León. León, Guanajuato
Phone: 52 (477) 710-7000 Ext. 7232
E-mail: contacto@fimoda.com.mx
Website: http://fimoda.com.mx/

EXPOIMIQ 2014
October 22nd - 24th, 2014
Exhibition on products and services for the chemical and petrochemical industry.
Location: Centro de Convenciones Tres Centurias. Aguascalientes, Ags.
Phone: 52 (33) 1617-4073, 52 (44) 9145-5262
E-mail: alex@sicarne.org; c6.sicarne@gmail.com; mf.sicarne@gmail.com
Website: http://www.sicarne.org/exposicarne.php

FIGAP 2014
October 22nd – 24th, 2014
Exhibition dedicated to the agricultural and livestock industries.
Location: Expo Guadalajara. Guadalajara, Jalisco
Phone: 52 (33) 3641-8119
E-mail: contacto@figap.com
Website: http://www.figap.com

EXPOSICARNE 2014
October 22nd - 24th, 2014
Trade show on specialized equipment and supplies for the cattle industry and symposium on beef cattle production.
Location: Centro de Convenciones Tres Centurias. Aguascalientes, Ags.
Phone: 52 (33) 1617-4073, 52 (44) 9145-5262
E-mail: alex@sicarne.org; c6.sicarne@gmail.com; mf.sicarne@gmail.com
Website: http://www.sicarne.org/exposicarne.php

BAJAMAK INDUSTRIAL EXPO
October 23rd, 2014
Manufacturing industries showcasing their supplying requirements for their product operations.
Location: Parque Industrial Valle Bonito. Tijuana, Baja California
Phone: 52 (666) 554-3233
E-mail: info@bajamak.com
Website: http://www.bajamak.com

AEROSPACE MEETINGS GUADALAJARA 2014
October 27th - 29th, 2014
International suppliers’ forum for the aerospace industry in Mexico
Location: Expo Guadalajara. Guadalajara, Jalisco
Phone: 52 1 (55) 5504-7178, 52 (55) 6719-3080
E-mail: dandrade@advbe.com
Website: http://www.bciaerospace.com/mexico/en/

Diario Oficial Notices

http://dof.gob.mx

- Decree that issues the Hydrocarbons Income Law, the Mexican Oil Fund for Stabilization and Development Law and also amends the Federal Fees Law and the Fiscal Coordination Law. August 11th, 2014.
- Decree enacting the Electric Industry Law, the Geothermal Energy Law and amending the National Waters Law. August 11th, 2014.
- Decree enacting the Hydrocarbons Law and amending the Foreign Investment Law; Mining Law, and the Public-Private Associations Law. August 11th, 2014.
- Initiation of the anti-dumping investigation on imports of steel and Zamak handles originating from China (Mexican tariff items 8302.42.99 and 8302.49.99). August 12th, 2014.
- Initiation of the anti-dumping investigation on imports of ammonium sulfate originating from the USA and China (Mexican tariff item 3102.21.01). August 12th, 2014.
- Tariff rate quota for the importation of chicken and turkey. August 14th, 2014.
- Decree that establishes the National Energy Control Center. August 28th, 2014.
- Decree that establishes the National Natural Gas Control Center. August 28th, 2014.

Mexican Official Standards

- Amended NOM-010-STPS-1999, on safety and hygienic conditions in the workplaces for the handling of chemical substances. August 27th, 2014.
Selected Reading

Mexico’s New Banking Measures Aim to Increase Credit, Transparency
The overhaul of Mexico’s banking laws, enacted as part of President Enrique Peña Nieto’s wide-ranging economic and business structural changes, is designed to increase credit to small and medium-sized businesses while enhancing regulatory oversight and transparency. The new law has the potential to increase the productivity of small and medium-sized businesses and help workers borrow against their future income, improving social mobility and income distribution.

Infrastructure Projects in Mexico

Metrorrey Line 3
Sponsor: Nuevo Leon State Government
Location: Nuevo Leon
Project Value: $251 million
Spain’s Construcciones y Auxiliar de Ferrocarril (CAF) won a 20-year contract to build 26 trains for the Metrorrey rail system in Monterrey, Nuevo Leon. The contract covers specialized infrastructure and equipment for Metrorrey’s Line 3. CAF, which will supply 26 articulated trains to the Metrorrey system, will provide replacement parts for two years and training in a variety of areas, including vehicle operation, traffic control, supervision and maintenance.
Business Opportunities: engineering, steel products, parts and components, electronic equipment, control equipment, precision instruments, electrical material.

Norte III Power Plant
Sponsor: Federal Electricity Commission (CFE)
Location: Chihuahua
Project Value: $1 billion
The combined-cycle Norte III power plant located about 19 miles south of the border city of Ciudad Juarez will require an investment of $1 billion. The power plant will have an installed capacity of 928 megawatts to supply electricity to 2.6 million homes, or approximately 10 million people. The purpose is to generate energy by means of combined cycle technology comprising gas turbines, and vapor turbines.
Business Opportunities: engineering, construction material, turbines, electrical equipment, transmission lines, substations, precision equipment, control instruments.

Success Stories

Kia Motors to Build an Auto Plant in Mexico
Kia Motors, part of South Korea's Hyundai Group, will invest $1 billion in a new factory in Mexico to manufacture 300,000 small cars annually for North America and Latin America -- the first South Korean auto-assembly plant in Mexico. "This plant will serve the purpose of satisfying demand pressure due to the success of the brand in the U.S.,” Kia spokesman Michael Choo said. "Mexico is well-known for its skilled labor force and numerous free trade agreements (such as NAFTA) with about 40 countries." The Kia factory will be located in Pesqueria, Nuevo Leon, with the capacity to build 300,000 vehicles a year.

LG Innotek Opens Auto Parts Plant in Mexico
LG Innotek, a South Korean electronic materials and components producer, built its first overseas automotive electronic parts plant in San Juan del Rio, Mexico. The 34,000-square-meter plant began manufacturing motors for dual clutch transmission systems production last August and will expand manufacturing of other motors for antilock brake and electric power steering systems for its regional auto and auto parts makers by 2016.

Howa Inaugurated a New Production Plant in Aguascalientes
Howa Textile Industry, a Japanese car interiors manufacturer, inaugurated one more link in Mexico’s auto supply chain with a new production plant located in Aguascalientes. With an initial investment of $29.5 million, the new 4,200 square-meters facility will employ 35 workers out of the 200 forecasted once full capacity is reached. The plant will start producing car interiors. Lozano de la Torre, Governor of Aguascalientes, said that “the State has recovered its position as a role model for development, economic growth and quality of life both in Mexico and abroad”.

Faurecia Expands its Plant in Puebla
France-based Faurecia Interiores will inaugurate an additional production center for their plant installed in Ciudad Textil Industrial Park in Puebla, generating 60 direct jobs. The expansion represents a $25 million investment in new capacity to increase seats and steering wheels production. Just last year, Faurecia inaugurated its fifth plant at the State of Puebla with an investment of $23 million, generating 700 jobs in the production of car interiors, mainly seat covers.

Mitchell Plastics Opens Facility in Queretaro
Mitchell Plastics, a Canadian tier-one supplier of automotive interior mechanisms and decorative components, started operations in Queretaro. The $30 million investment will initially employ 250 people, but the goal is to reach 600 within two years and there are plans of expansion. Mark Asselin, General Manager, Mitchell Plastics Queretaro, expressed his appreciation of the employees for the work done in vacuum forming, plastics injection, injection molding and multi-injection, since they thereby contribute to the growth of both the company and the automotive sector.

Mexico Economic Update

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Montana

In 2013, Montana's exports to Mexico reached $56 million, up $43 million from their level in 1993. In the first half of 2014, Montana exported $53 million worth of products to Mexico, an increase of 92.6% in comparison with the same period last year.

Among all U.S. states, Montana was ranked 46th as an exporter of goods to Mexico in the first semester of 2014.

In 20 years of NAFTA, Montana's exports to Mexico have increased by 331%.

Since NAFTA was implemented, Montana's sales to Mexico have grown at an annual average rate of 7.6%. In 2013, the exports to Mexico increased by 5.7% with respect to the previous year.

Mexico is an important trading partner to Montana. It was ranked as the 4th largest export market for goods from Montana in the first six months of 2014, illustrating the impact of NAFTA for Montana's growing businesses. Mexico accounted for 7% of Montana's exports worldwide in the January-June period of 2014.

Exports to Mexico
1993 - 2013 (Billions of US Dollars)

Mexico is a large market for products from Montana

Sorted by 2013 Exports to Mexico, total value in millions of US dollars

<table>
<thead>
<tr>
<th>NAICS</th>
<th>Description</th>
<th>Exports to Mexico</th>
<th>Exports to the World</th>
<th>Mexico's Share</th>
<th>Rank among state Exports to Mexico</th>
<th>Rank among state Exports to the World</th>
</tr>
</thead>
<tbody>
<tr>
<td>212</td>
<td>Minerals and ores</td>
<td>13.3</td>
<td>121.5</td>
<td>11.0%</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>336</td>
<td>Transportation equipment</td>
<td>12.3</td>
<td>36.7</td>
<td>33.6%</td>
<td>2</td>
<td>7</td>
</tr>
<tr>
<td>111</td>
<td>Agricultural products</td>
<td>9.9</td>
<td>67.1</td>
<td>14.8%</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>331</td>
<td>Primary metal manufacturing</td>
<td>4.5</td>
<td>77.7</td>
<td>16.1%</td>
<td>4</td>
<td>9</td>
</tr>
<tr>
<td>325</td>
<td>Chemicals</td>
<td>2.6</td>
<td>165.2</td>
<td>1.5%</td>
<td>5</td>
<td>1</td>
</tr>
<tr>
<td>321</td>
<td>Wood products</td>
<td>2.0</td>
<td>17.3</td>
<td>11.3%</td>
<td>6</td>
<td>14</td>
</tr>
<tr>
<td>327</td>
<td>Nonmetallic mineral products</td>
<td>1.8</td>
<td>38.4</td>
<td>4.6%</td>
<td>7</td>
<td>5</td>
</tr>
<tr>
<td>324</td>
<td>Petroleum and coal products</td>
<td>1.5</td>
<td>37.0</td>
<td>4.1%</td>
<td>8</td>
<td>6</td>
</tr>
<tr>
<td>333</td>
<td>Machinery, except electrical</td>
<td>1.5</td>
<td>56.1</td>
<td>2.6%</td>
<td>9</td>
<td>4</td>
</tr>
<tr>
<td>311</td>
<td>Food and kindred products</td>
<td>0.8</td>
<td>31.3</td>
<td>2.6%</td>
<td>10</td>
<td>8</td>
</tr>
</tbody>
</table>

These 10 sectors account for 94.9% of the state's total exports to Mexico, and account for 79.4% of the state's total exports to the World

Source: US Census with adjustments made by the World Institute for Strategic Economic Research (Wiser), and SE-NAFTA. 1993-1996 by SIC and 1997-2014 by NAICS.
San Luis Potosi

The geographical position of San Luis Potosi offers investors, suppliers and consumers quick and easy access to the global market, allowing companies to operate with competitive costs. The state also offers abundant natural resources, a modern and growing infrastructure, and a highly skilled pool of young workers who are perfectly capable of integrating added value to technology and advanced industrial processes. Additionally, the NAFTA Corridor and other major multimodal logistics routes make the state a world-class manufacturing hub to compete in the global markets.

Main cities: San Luis Potosí (pop. 723K, the capital), Soledad de Greciano (pop. 255K), Ciudad Valles (pop. 125K), Matehuala (pop. 77K)

Population: 2.58 million inhabitants (2010)
64% in urban areas

Education: 34K college students, 43% in engineering
92 Universities and technological institutes
162K Students enrolled in high schools and technical schools

Infrastructure: 3,365 miles of paved roads
252 miles of four lane highways
4,708 Trucking companies; 19,447 truck total
767 miles of railways link state’s main industrial centers and ports on both Atlantic and Pacific coasts
1 International airport: San Luis Potosí provides access to 3 cities in the U.S. and 16 domestic destinations with more than 4,949 flights annually, and all cargo services and logistics
3 Intermodal cargo terminals
2 Strategic naval anchorages
16 Industrial parks
327K Fixed telephone lines
77 Mobile telephone users per 100 inhabitants
285K Cable TV subscribers
214 Bank branches
723 ATMs

Gross Domestic Product (2012)

Transportation 6%
Mining 6%
Construction 5%
Other Services 13%
Commerce 13%
Manufacturing 27%
Financial Services 13%


Exports: $7.2 billion (2012)
Imports: $3.61 billion (2010)

Major exports: vehicles, autoparts, harnesses, motors, tires, electronic and electrical devices & components, plastics, boilers, airplane parts, clothes, kitchens, compressors, sugar, confectionery, snacks, chemicals, steel, refrigerators, ranges, furniture, medical devices, copper, gold.

Foreign Direct Investment (FDI): $2.5 billion (1999-2013)
FDI Companies: 370 (1999-2013)
Countries with major investments: The United States, Germany, Netherlands, United Kingdom, Japan, Spain, Canada.
The World Bank Ease of Doing Business in Mexico Ranking: 4th
Enforcing contracts: 19th
Dealing with construction permits: 7th
Starting a business: 6th
Registering property: 6th

Foreign Direct Investment (millions of U.S. dollars)

Source: Ministry of the Economy.

Foreign Direct Investment by Sector (1999-2013)

Manufacturing 75%
Commerce 13%
Other Services 3%

San Luis Potosi’s key economic sectors: automotive and auto parts, consumer electronics, electrical equipment, fabricated metal products, iron foundry and steel, chemicals, processed food, textile and apparel, mining (830 titled concessions covering 1.35 million hectares), IT and software, logistics, aerospace, furniture.

Contact: Paola Felix Beltran, (444) 834-36-00 Ext. 3702, paola.felix@sip.gob.mx