



20 AYUNTAMIENTO
DE TIJUANA

SEDETI

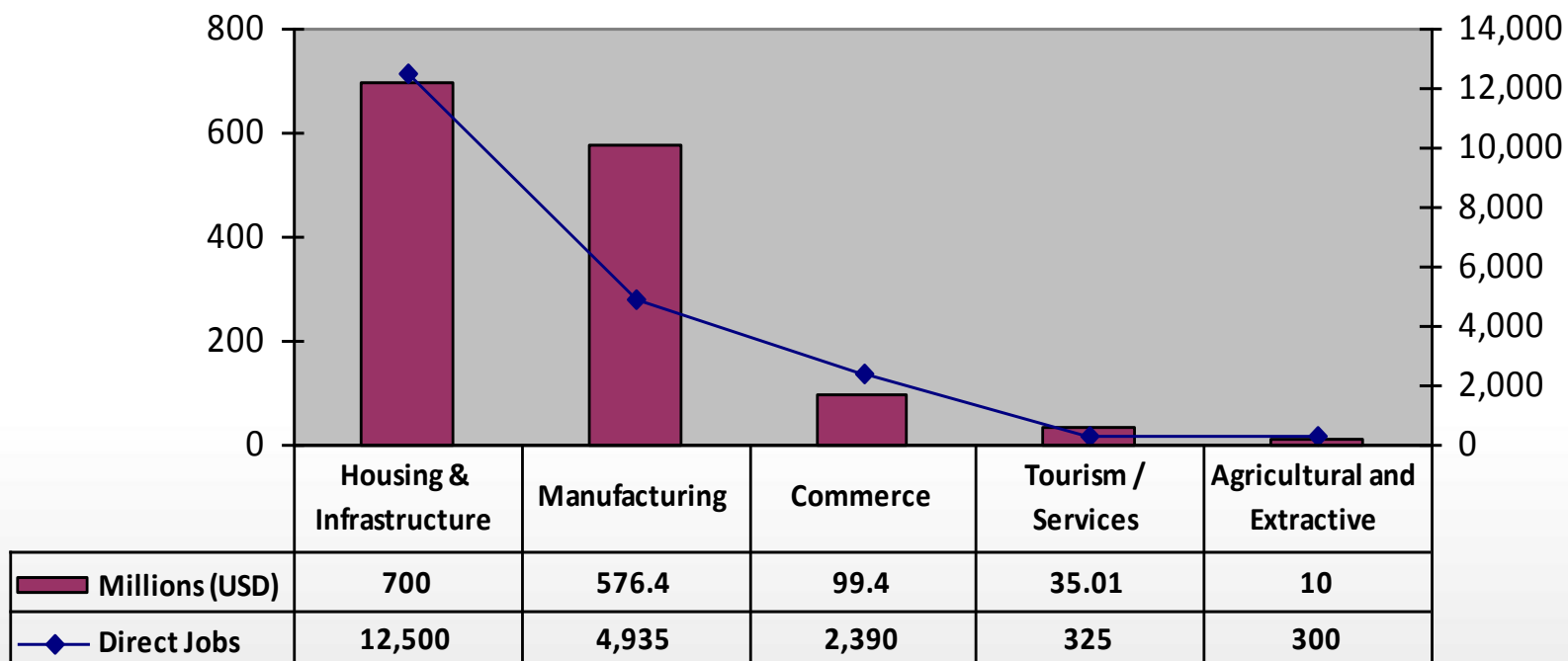
SECRETARÍA DE
DESARROLLO ECONÓMICO
DE TIJUANA



Supply Chain Opportunities in Tijuana's Key Industries

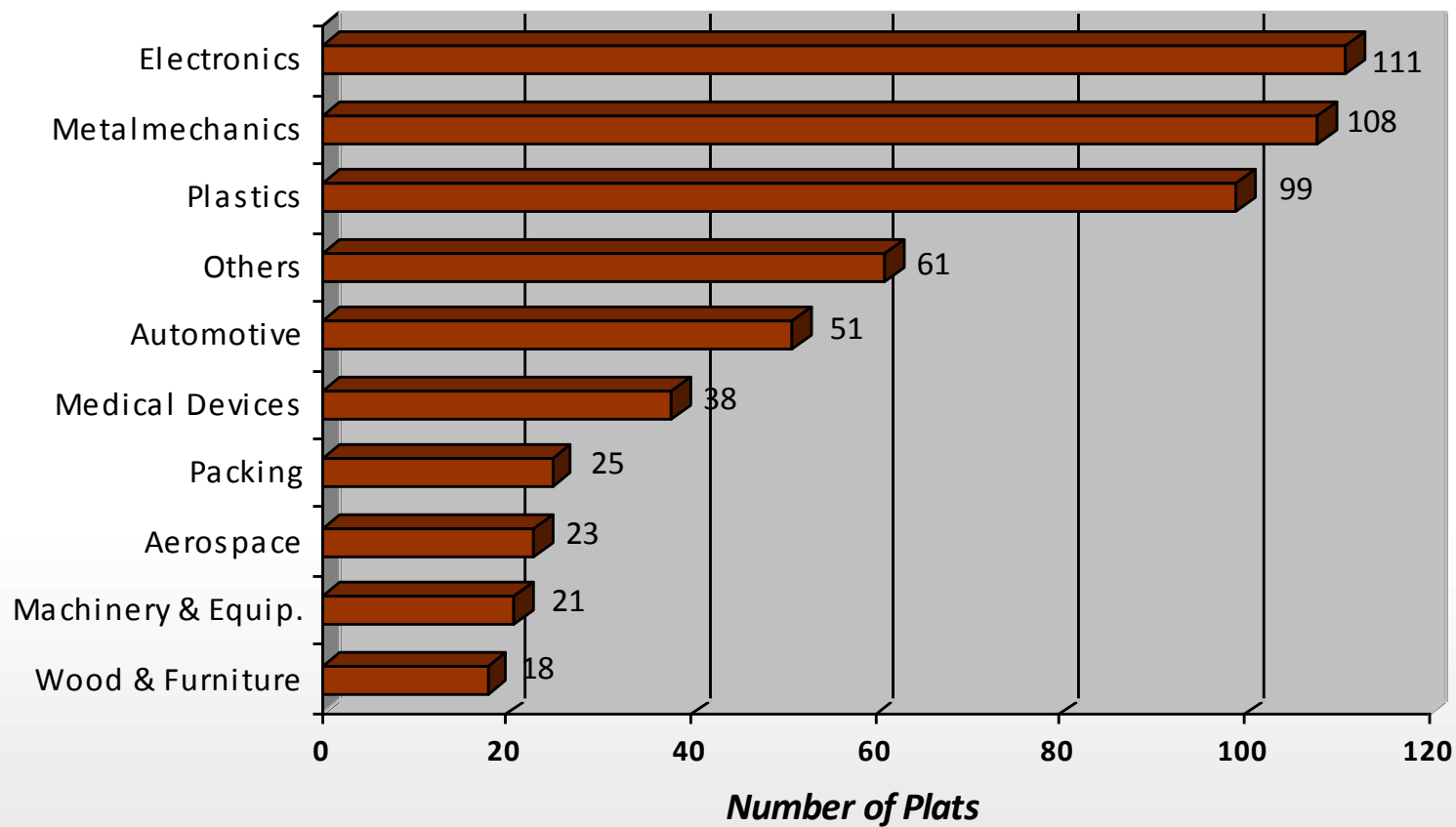
*A Study for Tijuana's economic
promotion at global markets.*

New Jobs & Investment by Sectors, Tijuana 2011



Source: SEDETI, with own data of 2011.

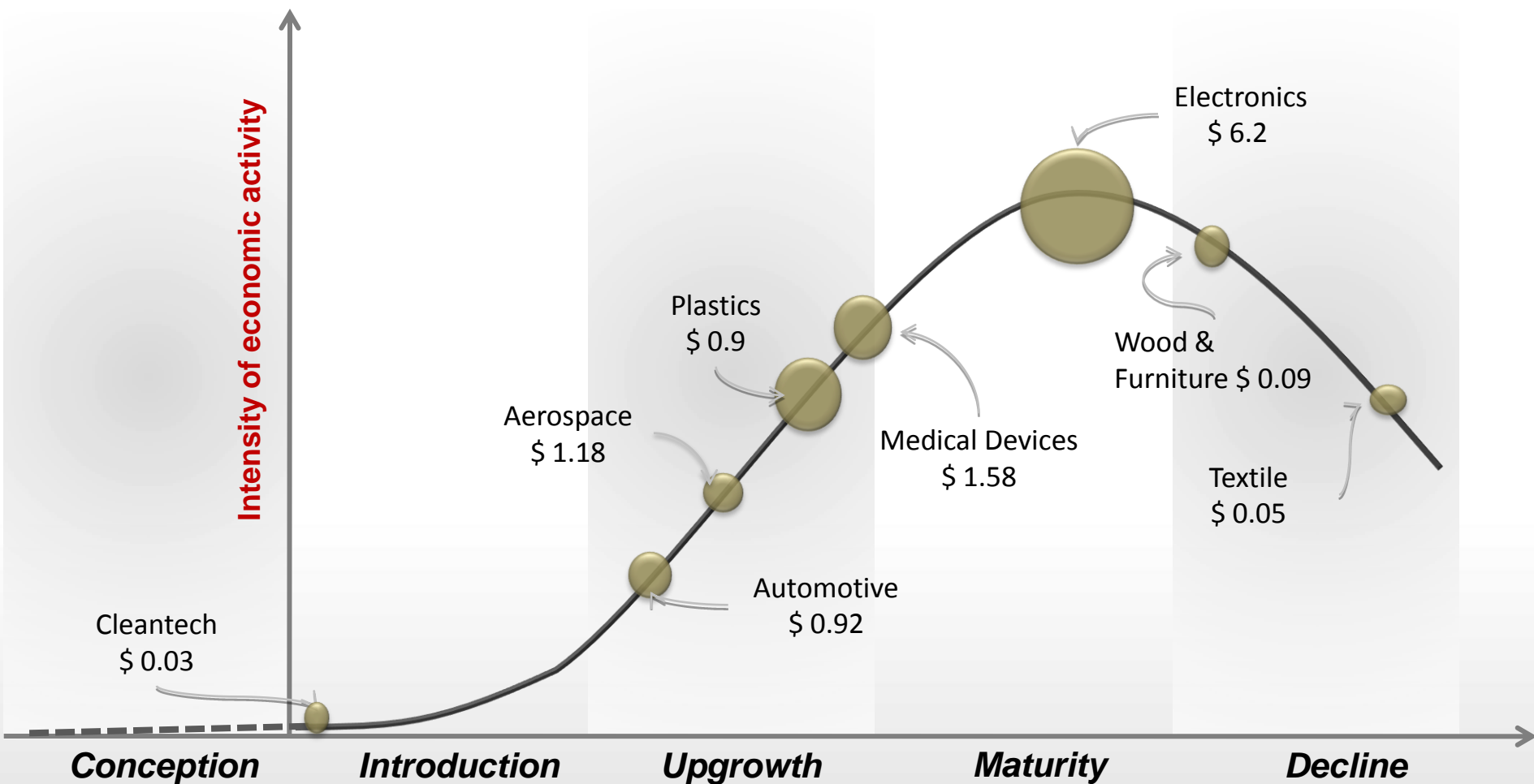
Industrial companies by sector.



Source: INEGI and SEDETI with own 2011 data.

Tijuana's Outstanding Clusters: Evolution and Integration.

Estimated Annual Market Demand (Billions of USD)



Evolution of economic activity.

AEROSPACE COMPANIES IN TIJUANA		
<i>Industrial Supplier Needs</i>	<i>(%) Frequency in survey companies.</i>	<i>Estimated local market demand (millions of USD).</i>
<i>Materials</i>		
1. Aluminum and metal alloys.	95%	270
2. Carbon fiber.	92%	110
3. Foam pieces.	87%	100
4. Optical fiber.	85%	65
5. Advanced and composite materials.	83%	67
6. Extruded hoses and other materials.	72%	25
7. Fiberglass.	65%	45
8. Wiring.	52%	40
9. Fur and natural upholstery parts.	40%	15
10. Synthetic microfiber or mixed fabrics.	35%	3
<i>Services</i>		
1. Metal stamping.	92%	80
2. Metal parts casting.	87%	60
3. Computer design.	72%	120
4. Aircraft electronic parts maintenance and repair.	68%	100
5. Plastic parts thermoformed.	62%	85
6. Modeling and flight simulation.	35%	5

*Estimated annual market demand **

U.S. \$1.18 Billions

Source: Surveyed companies by SEDETI.

*Considering foreign purchases made by global and local companies established in Tijuana.

MEDICAL DEVICES COMPANIES IN TIJUANA

<i>Industrial Supplier Needs</i>	<i>Frequency in survey companies. (%)</i>	<i>Estimated local market demand (millions of USD).</i>
Materials		
1. Plastic Films.	98%	260
2. Rubber Parts.	95%	130
3. Extruded materials.	91%	120
4. Micro screws and precision parts.	70%	54
5. Metal structures.	68%	10
6. Metalworking parts (by casting).	52%	15
7. Foam pieces.	45%	10
Services		
1. Sterilization.	98%	300
2. Microbiological laboratories (water analysis, biocides analysis, microorganisms identification, other plastic components analysis).	96%	170
3. Liquid injection molding (LIM).	95%	100
4. Calibration.	89%	80
5. Extrusion, film calibrated pipe (tubing & film).	87%	90
6. Blow molding plastic.	84%	40
7. MRO (Industrial Maintenance Service, repair and operation of machines).	83%	20
8. Machining of medical products.	74%	52
9. Dies and molds maintenance.	42%	8
10. Stampings.	35%	11
11. Nano electronic assembly.	25%	13
12. Rotational molding of plastic parts.	24%	14

*Estimated annual market demand **

U.S. \$1.58 Billions

Source: Surveyed companies by SEDETI.

* Considering foreign purchases made by global and local companies established in Tijuana.

AUTOMOTIVE COMPANIES IN TIJUANA		
<i>Industrial Supplier Needs</i>	<i>Frequency in survey companies. (%)</i>	<i>Estimated local market demand (millions of USD).</i>
<i>Materials</i>		
1. Aluminum.	92%	105
2. Cables and harnesses.	89%	82
3. Fiberglass.	84%	85
4. Carbon fiber.	81%	75
5. Valves, Hoses.	74%	45
6. Resins.	45%	25
7. Optical fiber.	39%	35
Services		
1. Precision machining.	92%	124
2. Plastic molding by thermoforming.	84%	120
3. Plastic injection molding.	78%	115
4. Rectification of parts, platinized.	48%	85

*Estimated annual market demand **

U.S. \$0.92 Billions

Source: Surveyed companies by SEDETI.

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CLEANTECH COMPANIES IN TIJUANA		
<i>Industrial Supplier Needs</i>	<i>Frequency in survey companies. (%)</i>	<i>Estimated local market demand (millions of USD).</i>
Materials		
1. Cleanroom supplies.	85%	1.8
2. Solar glass.	82%	4.1
3. Metal alloys.	78%	3.8
4. Precision tools.	75%	2.5
5. Electronic components.	68%	1.5
6. Tools and small instruments.	63%	2.5
7. Chemicals.	15%	0.5
8. Paper and paper products.	12%	0.3
Services		
1. Verification.	78%	2.1
2. Computers and Copiers.	52%	1.7
3. Recycling of plastic and metal parts.	38%	0.8
4. Packing services.	25%	0.5
5. Industrial labeling and printing.	15%	0.2

*Estimated annual market demand **

U.S. \$0.03 Billions

Source: Surveyed companies by SEDETI.

* Considering foreign purchases made by global and local companies established in Tijuana.

ELECTRICAL & ELECTRONICS COMPANIES IN TIJUANA		
<i>Industrial Supplier Needs</i>	<i>Frequency in survey companies. (%)</i>	<i>Estimated local market demand (millions of USD).</i>
Materials		
1. Packaging.	48%	910
2. PCB tablets.	35%	650
3. Microprocessors.	28%	1,500
4. Plastic injection molding.	25%	850
Services		
1. Recycling services.	42%	635
2. Machine shop service.	32%	950
3. Labeling service.	24%	470

*Estimated annual market demand **

U.S. \$6.2 Billions

Source: Surveyed companies by SEDETI.

* Considering foreign purchases made by global and local companies established in Tijuana.

PLASTICS COMPANIES IN TIJUANA		
<i>Industrial Supplier Needs</i>	<i>Frequency in survey companies. (%)</i>	<i>Estimated local market demand (millions of USD).</i>
Materials		
1. Corrugated cardboard.	92%	110
2. Polymers.	87%	350
3. Resins.	85%	200
Services		
1. Molding services.	98%	100
2. Powder coating.	96%	85
3. Computer design services.	87%	75

*Estimated annual market demand **

U.S. \$0.9 Billions

Source: Surveyed companies by SEDETI.

* Considering foreign purchases made by global and local companies established in Tijuana.

METALMECHANICS COMPANIES IN TIJUANA		
<i>Industrial Supplier Needs</i>	<i>Frequency in survey companies. (%)</i>	<i>Estimated local market demand (millions of USD).</i>
<i>Materials</i>		
1. Metal sheets.	98%	290
2. Stamping oil.	82%	120
3. Thinner laquer.	75%	6
4. Aluminum brackets.	48%	20
<i>Services</i>		
1. Machining and mold making.	86%	150
2. Metal parts cleaning service.	85%	85
3. Pressed metal parts.	82%	80
4. Armed with metal parts.	74%	65

*Estimated annual market demand **

U.S. \$0.8 Billions

Source: Surveyed companies by SEDETI.

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WOOD & FURNITURE COMPANIES IN TIJUANA		
<i>Industrial Supplier Needs</i>	<i>Frequency in survey companies. (%)</i>	<i>Estimated local market demand (millions of USD).</i>
<i>Materials</i>		
1. Wood and chipboard.	98%	25
2. Ironwork pieces.	95%	10.5
3. Screws and metal accessories.	85%	4.1
4. Bottom cushions and upholstery materials.	68%	1.2
5. Adhesives.	65%	0.8
6. Laminates.	57%	0.5
7. Mixed fabric, microfiber.	43%	2.5
8. Vinyl.	28%	2.3
<i>Services</i>		
1. Computer design.	98%	1.2
2. Quality control.	95%	0.9
3. Services of industrial cleaning and hazardous waste management.	84%	1.2
4. Logistics.	72%	3.5
5. Communication services.	45%	2.1

*Estimated annual market demand **

U.S. \$0.09 Billions

Source: Surveyed companies by SEDETI.

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