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Expectativas de la industria metalmecánica y manufacturera para 2022

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Presidente Index Nacional



◆ Impacto Económico México 2021

- **Exportaciones: La más alta en los últimos 20 años**
- **Importación Activos: El más alto desde 2017**
- **Empleo: +103K adicionales año vs. Año**
- **Crecimiento IMMEX: 4.77%**




Manufactura en países TMEC



Empleo


8%

11% 

6%

Exportación


60%

62% 

68%

PIB

11%

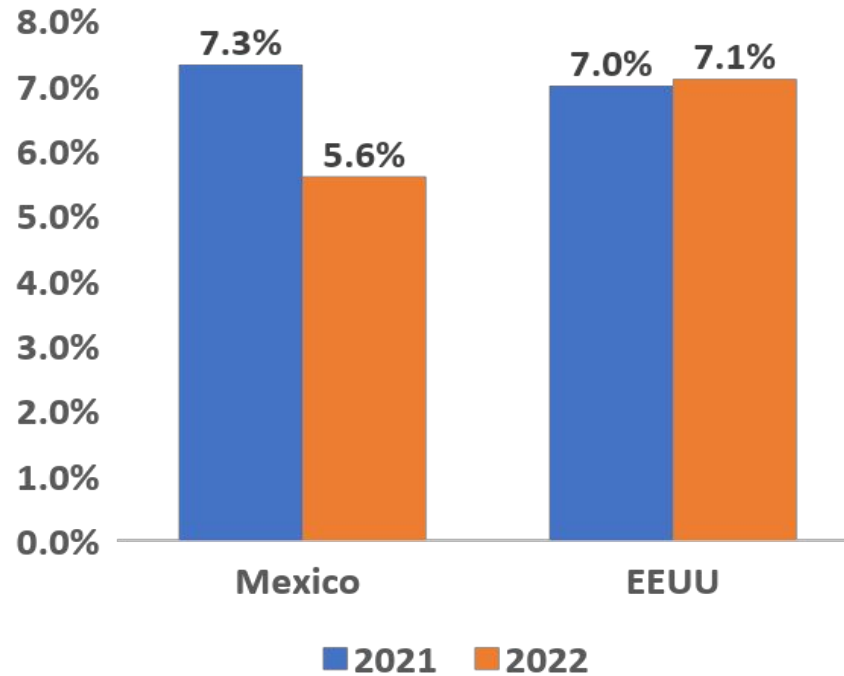
18% 

10%

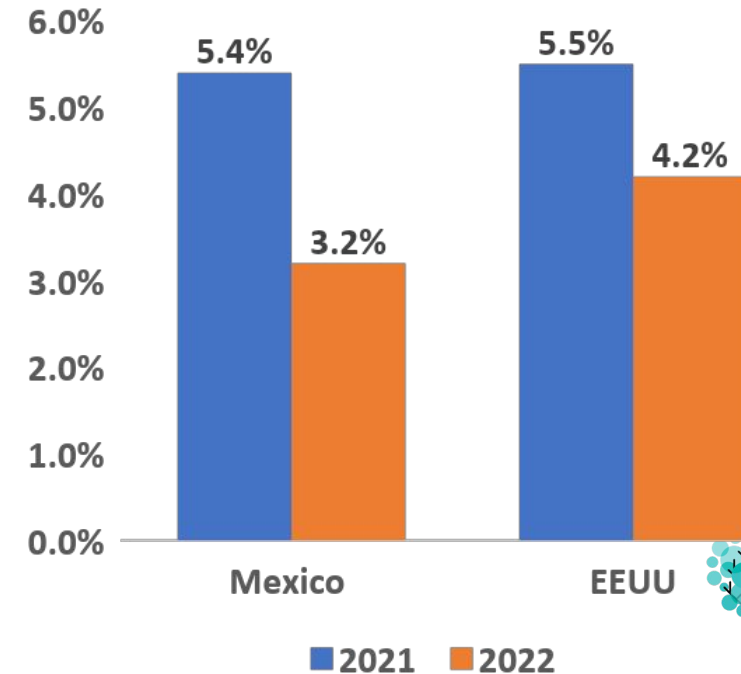


Expectativas Económicas 2022

Inflación

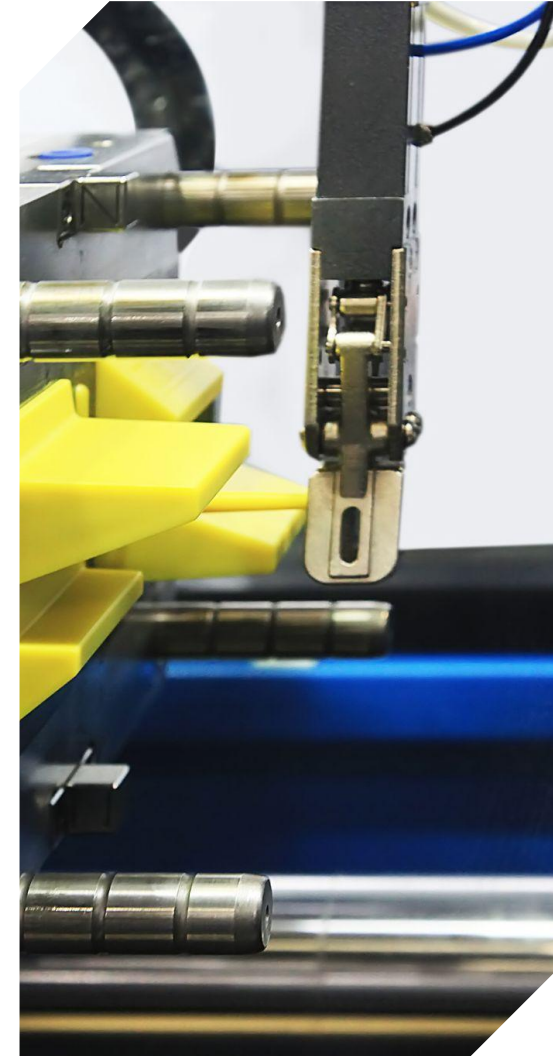
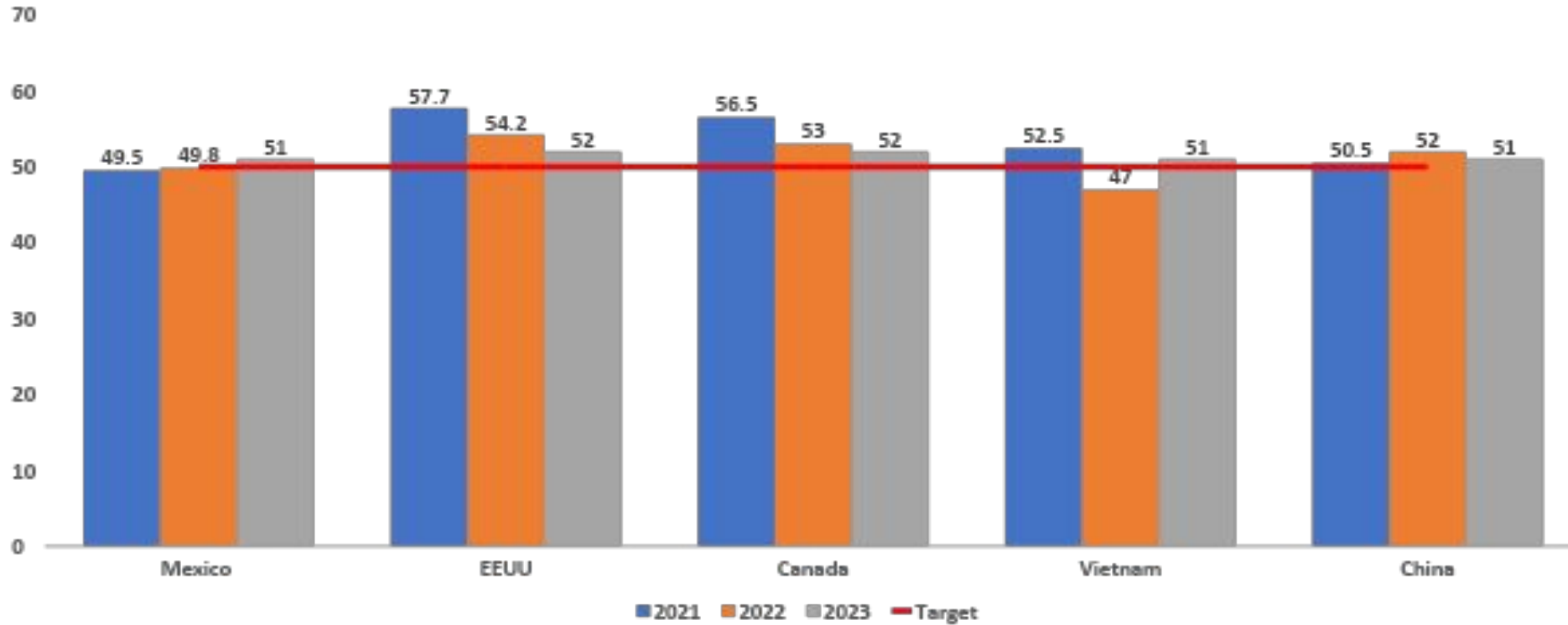


PIB





PMI Manufactura



Impacto del PMI en 2022

Crecimiento de Manufactura en EEUU +6.5%
Inversion en Capital en EEUU +7.7%
Utilizacion de la Capacidad de 88.3% a 89.7%

◆ Cambios radicales en la economía de EEUU



Inflación

La más rápida desde 1982



Empleo

+4.3 millones de personas dejaron sus empleos



Logística

Solo 1 de 3 contenedores llega a tiempo
Q4 Estabiliza Q2-2023



Omicron

21% decrementó el optimismo sobre recuperación



Factores Geopolíticos

1 de cada 7 líderes ve inestabilidad para crecimiento potencial



Energía en el Mercado

Gas Natural incrementa 50% su precio iniciando en Enero 2021

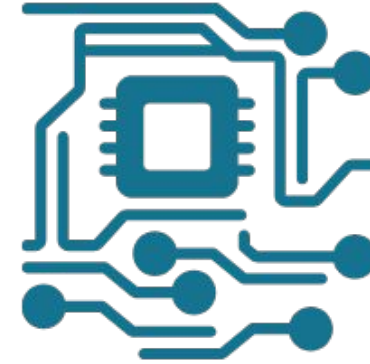
◆ ¿A dónde viene la inversión?



- Semiconductores
- Dispositivos Médicos
- Electrónica
- Comunicación



- Automotriz
- Metal mecánico
- Maquinaria
- Home improvement



- Farmacéuticos
- Electrónicos
- Semiconductores
- Dispositivos Médicos



◆ Retos para México 2022–2024

1. **Alta inestabilidad en Gobierno de EEUU**
2. **Reforma Energética en México**
3. **Adaptación al Ally Shoring y Near Shoring, creación de infraestructura**
4. **Alto énfasis en Mejorar el Negocio y bajo énfasis en Creación de nuevos negocios**
5. **Alta presión al Congreso de EEUU sobre TMEC**
6. **Re-Mapeo de estrategias de negocios – Automotriz y cadena de valor**



◆ Tendencias

Energy

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United States Senate
COMMITTEE ON FINANCE
WASHINGTON, DC 20510-6200

January 12, 2022

Ambassador Katherine Tai
600 17th Street NW
Washington, D.C. 20508

Dear Ambassador Tai:

- **State-Owned Preferences:** The Mexican government is actively pursuing policies to give preference to its state-run electricity provider and its state oil company (Petróleos Mexicanos) to the detriment of private competitors that often provide cleaner energy options. Mexico has suspended import permits for more than 80 energy companies; has ended permits for energy import facilities, which puts U.S. investment at risk; and is advancing a constitutional reform bill that would dissolve the Mexican power market, eliminate independent regulators, and cancel contracts and permits granted to private companies. Mexico's actions deprive private energy companies, including renewable energy companies, from market access, non-discriminatory treatment, and a level playing field in Mexico's energy sector.

USMCA earned broad support from bipartisan members of Congress, as well as stakeholders representing an array of interests. The Agreement promised to improve upon our existing trading relationship with Canada and Mexico, including through innovative provisions to swiftly address labor violations, promote agricultural market access through science-based decision-making, advance intellectual property rights protection, and improve the regulation of state-owned enterprises. Unless Canada and Mexico are held to their commitments under USMCA, however, U.S. workers, businesses, and farmers will be denied the full benefits they were promised. Therefore, it is of critical importance that USTR continue to diligently monitor Canada and Mexico's compliance with the Agreement and ensure that every chapter of the Agreement is fully enforced. We stand ready to work with you as closely in implementing USMCA as we did in negotiating and approving it.

We look forward to receiving a briefing soon regarding the progress made on addressing the aforementioned issues.





¡Gracias por su tiempo!



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