Focus Mexico

SME Study-trip to Mexico – Nov 3rd – 6th

Business Sweden Mexico

The #FocusMexico SME Study-trip enables Swedish SMEs to discover their potential in Mexican market

What is it?

The Focus Mexico SME Study-trip is a **4-day program in Mexico covering Mexico City and Monterrey**, where participants will have a firsthand experience of opportunities across one of the fastest growing large economies in the world

The program will take participants through a **well-curated and dedicated meeting program** to learn from leading companies, industrial associations and governmental agencies in the country about **how to enter and succeed in Mexico**

Note: SME defined as < 250 employees, turnover < EUR 50 mn, not subsidiary of large corporation.

Why should I join?

1. Build **market insight through direct engagements** with leading experts on the ground
2. Create a network and **establish relationships** with local stakeholders and decision-makers
3. Leverage **Sweden's positioning and brand** as an innovative and sustainable country

#FocusMexico is an initiative launched by Business Sweden to help Swedish companies expand and win business in Mexico

Focus Mexico is a Business Sweden initiative to support Swedish companies expand and win business in Mexico

Key overall goals of Focus Mexico include:

1. **Increase Swedish companies' share of export and presence in Mexico**
2. Strengthen competitiveness of Swedish businesses in Mexico and the region through participation in the Study Trip Delegation
3. Develop investment promotion to increase interest in Mexico as an investment destination from the region

Gain insights about key trends and recent developments in sustainable manufacturing, digitalization and industrialization in Mexico

Mexico

# of Swedish companies

~ 110

Example of focus* the Focus Mexico SME Study-trip

Renewable Energy

Industrial manufacturing

Automotive and mobility

13 th	Largest economy in the world
48 %	Economically active population
15 th	Largest exporter in the world
1 st	U.S. trade partner
$ 1.8 trillion	GDP
131 M	Population
2.5%	Unemployment rate
50 +	Countries with trade policy
82 %	Exports destinated to the U.S.
$ 14 K	GDP per capita

Source: World Bank, DataMexico, The United States Census * Tentative focus areas – to be determined once participants are confirmed

Helena Carlsson, Sweden's Trade and Invest Commissioner to Mexico and Central America

"*Mexico's dynamic and resilient economy, a key global player and the second largest in Latin America, presents a natural and stable partnership for Swedish companies seeking expansion. Its strategic position as a nearshoring hub, skilled workforce, and business-friendly climate align with Sweden's strengths in innovation and sustainable technology, fostering deep, mutually beneficial ties.*"

Mexico offers considerable potential, although outcomes differ depending on suitability and location

Mexico fit lens: What works and challenges

+ **Proximity** to the U.S. supports shorter lead times, lower logistic costs and access to the North American region

− **Compliance and transparency** require structured internal processes and controls, particularly for export-oriented operations

+ **Export-oriented** operating frameworks support cost-efficient setups, particularly those integrated into North American supply chains

− **Security considerations** can increase operating costs depending on location and industry

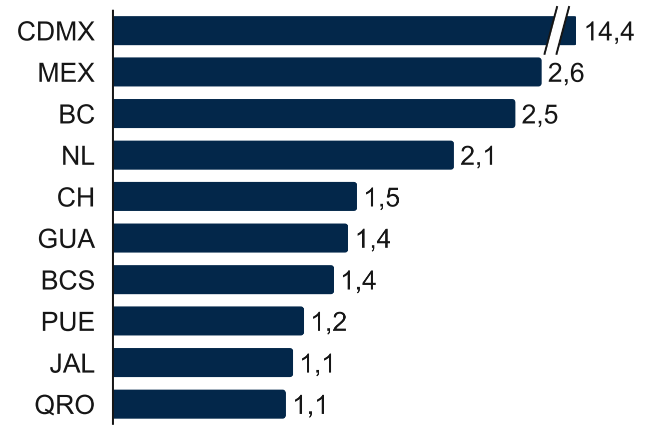
+ **Trade relations** remain strong globally, with North American trade remaining relatively stable and predictable

− **High exposure to the U.S.** market increases sensitivity to external demand cycles and periodic trade policy reviews under USMCA

+ **Access** to large domestic market that also enables reach to other competitive markets while maintaining cost competitiveness

− **Levels of informality** and application of international standards vary across regions, requiring careful partner and supplier selection

Business Activity Concentration by state,
FDI 2024 (MUSD) – Top 10 states



- In 2024, Mexico recieved USD 36.8bn with 79% concentrated in 10 states
- Business Activity in Mexico is highly concentrated in a limited number of states
- Location choice has a material impact on operating costs, talent availability and tis exposure
- Manufacturing accounts for the majority of FDI inflows (54% in 2024), reinforcing the concentration of business activity in specific states

Source: Ministry of Economy, Mexico Business, Business Sweden Analysis

Mexico's Economic Scale Concentrates Nationally, but Regional Industrial Strength Determines Market Entry Success

Bottom *Growth ranking* *Top*

Table of comparative macro-economic variables at a national and regional level

	Manufacturing GDP*		Exports (USD)		FDI (USD)	
	Percentage of national GDP (2024)	y-o-y growth**	Value (2024)	y-o-y growth	Value (2024)	y-o-y growth
National	20.69%	-0.05%	$552.7 B	3.55%	$36.9 B	1.1%
Mexico City	0.77%	0.22%	$4.03 B	4.13%	$14.4 B	27.93%
Nuevo León	2.58%	0.73%	$57.3 B	2.30%	$2.1 B	-17.85%

Source: Government of Mexico, INEGI, IMCO, DataMéxico, SENER, CFE
*Foreign Direct Investment ** From 2023 to 2024

Regional Insights

- **Mexico's economic scale is concentrated nationally, exports and FDI capturing aggregate momentum, yet it diverges regionally**
  - Mexico City is economically central but not a manufacturing scale hub, while Nuevo León is export-intensive yet represents only a limited share of total national output, making regional positioning critical for entry
- **Manufacturing remains a Mexico's core growth engine**. Growth is shifting from volume to capability, favoring suppliers that deliver productivity, automation, sustainability, and reliability over low-cost capacity.

Grid Readiness and Industrial Execution Shape Energy Market Entry in Mexico

Bottom *Growth ranking* *Top*

Table of comparatives within the energy sector, national and by region

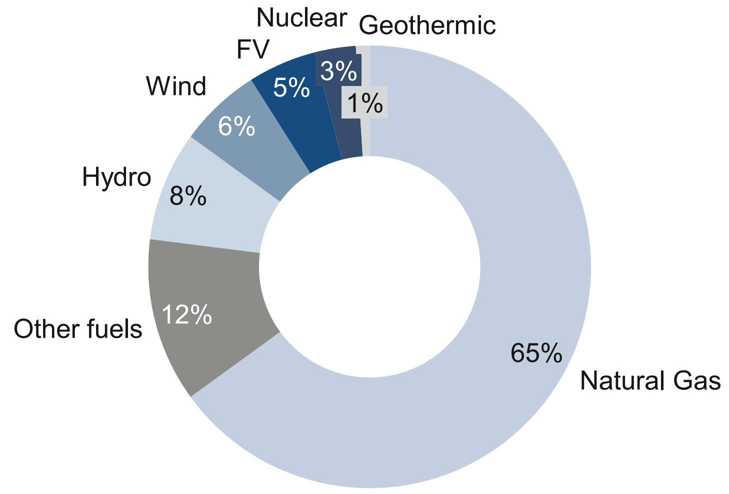
Energy (supply-demand bridge)
(Units in system-level/regional proxies)

	Highest consumption during the year (2024)	Installed generation capacity	Difference	Proyected demand 2030
National	55,528 MW/h	90,543 MW	35,015 MW	412,402 MW
	Regional highest consumption (2024)	Installed capacity in substations of high to medium tension		
Mexico City	6,303 * MW	13,122 * MVA	6,819 MW	
Nuevo León	7,816 * MW	10,628 * MVA	2,812 MW	

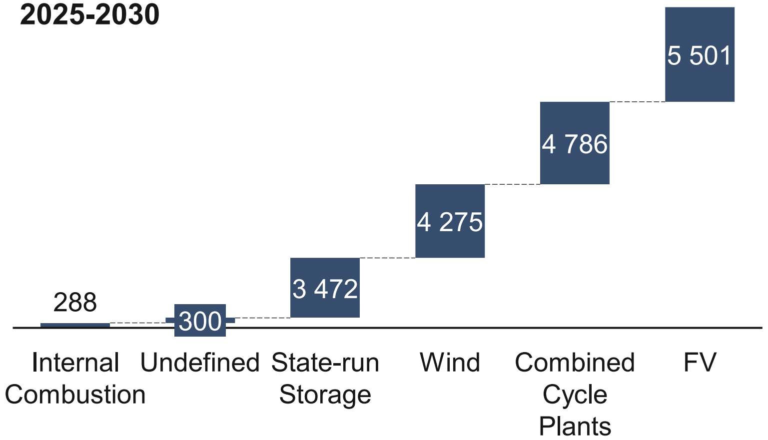
Sector Insights

- **Mexico's electricity system is still dominated by natural gas, with renewables playing a complementary role**, favoring technologies that enhance efficiency, reliability, and grid integration over mere renewable substitution
- **Project design, efficiency, and grid interaction will determine entry success, particularly in industrial regions.** As consumption rises and capacity margins tighten, solutions that optimize, de-risk, or reduce load intensity gain a clear advantage, especially regionally
- **Energy investment is flowing into scalable, flexible, and grid-compatible solutions** (solar, combined cycle, and storage) highlighting strong demand for infrastructure that supports industrial growth and system stability

Electric Matrix in Mexico, Jan-Sep 2025 by technology



Estimated planned investment amount (MUSD) 2025-2030



Source: Government of Mexico, INEGI, IMCO, DataMéxico, SENER, CFE
*Foreign Direct Investment ** From 2023 to 2024, México cómo vamos? (2025), PLEDASE

* Capacity in the **energy state variables** refers to installed substation transformation capacity (high-to-medium voltage). MVA and MW are treated as approximately equivalent at the system level. Demand corresponds to maximum observed regional load in 2024. Regional divisions are used as proxies for state boundaries.

Tentative

Well-curated meeting programs including workshops with industry associations and conglomerates will be setup across each target city as part of the study visit

THE 4-DAY SME DELEGATION PROGRAM 2026

Pre-arrival

Preparatory activities

- Assess best fit/interest with participants
- Knowledge-sharing sessions
- Participant companies' Export Validations

4-day Delegation Program

	Mexico City 2nd Nov	Monterrey 3rd Nov	Monterrey 4th Nov	Mexico City 5th Nov	Mexico City 6th Nov
Activities	**Arrival to Monterrey, Mexico**	**Kick-off & Regional Market Overview** • Welcome and delegation kick-off • Business Sweden market briefing • Overview of Mexico's industrial landscape • Introductory meeting with local stakeholders • Welcome dinner / networking	**Industrial Ecosystem & Innovation Deep Dive** • Introduction to Nuevo León's industrial ecosystem • Cross-sector knowledge sessions • Visit to innovation / R&D center, industrial park or selected companies • Networking with local stakeholders and business community	**Sweden–Mexico Day** • Flagship event for Swedish companies in Mexico • Sessions on policy, investment climate and sector opportunities • Cross-sector networking and matchmaking • Evening networking activity	**Institutional Meetings & Business Environment** • Meetings with key public and institutional stakeholders • Cross-sector business meetings and knowledge exchange • Optional follow-up meetings

Post-departure

Individual follow-up

- Business opportunities realization
- Continued individual support (based on outcome)
- Consulting support - Export validation (up to 16h of support**)

* We recommend arriving at least a day prior to the start of program activities.

* * Tentative – Individual sessions subject to change ** Engage Business Sweden consultants to dive deeper into selected market/s to validate your business potential. Key questions to be discussed and agreed upon beforehand. Export Validation projects should not previously have been granted during 2025.

Focus Mexico SME Study Trip will help you in (1) gain market insights, (2) Network Building and (3) Explore business collaborations and partner opportunities

1

Market insights

Build market insight through direct engagements with leading experts on the ground

2

Network-Building

Create a network and establish relationships with local stakeholders and decision-makers

3

Business Opportunities

Leverage Business Sweden's network to explore business collaboration and partnership opportunities with leading Indian companies and conglomerates

Participation fee

15 000 SEK

Participation fee

per company · excl. VAT and taxes

__Included__:

- **Participation: 1 representative per company**
  (+5 000 SEK for each additional participant)

__Not included__:

- **Out of the program transport; accommodation** (Est. additional costs for five days **~12 000 SEK pp***)

Registrations: https://events.business-sweden.com/events/cedc13a942

For more information, please contact: sofia.calvo@business-sweden.se

Note: Delegation pricing exclusive of VAT and taxes. * Estimated additional cost - To be determined once participants are confirmed

BUSINESS SWEDEN

THE SWEDISH TRADE & INVEST COUNCIL