
PERSPECTIVA NACIONAL DEL COMERCIO Y DEL TRANSPORTE BINACIONAL ENTRE MEXICO Y ESTADOS UNIDOS

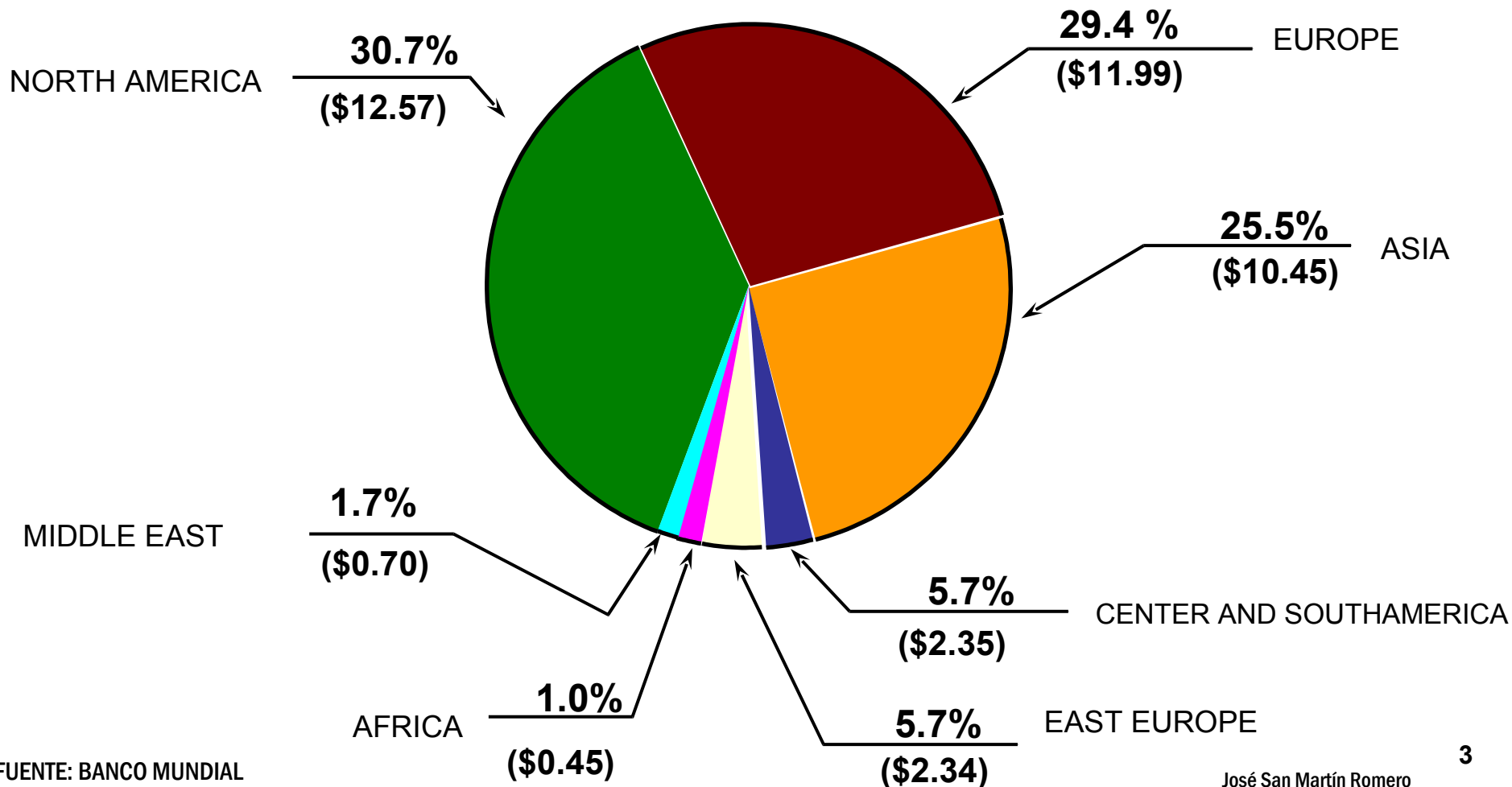
9 de mayo , 2006

CONTENIDO

- ➔ DESARROLLO ECONOMICO Y COMERCIAL DE ESTADOS UNIDOS Y MEXICO
- ➔ DESARROLLO Y DEMANDA DE INFRAESTRUCTURA DE TRANSPORTE
- ➔ PROGRAMA DE INFRAESTRUCTURA PARA EL TRANSPORTE TRANSFRONTERIZO

SHARE OF THE GLOBAL WORLD GROSS PRODUCT BY REGION 2004

WGP = \$40.8 TRILLONES DE USD

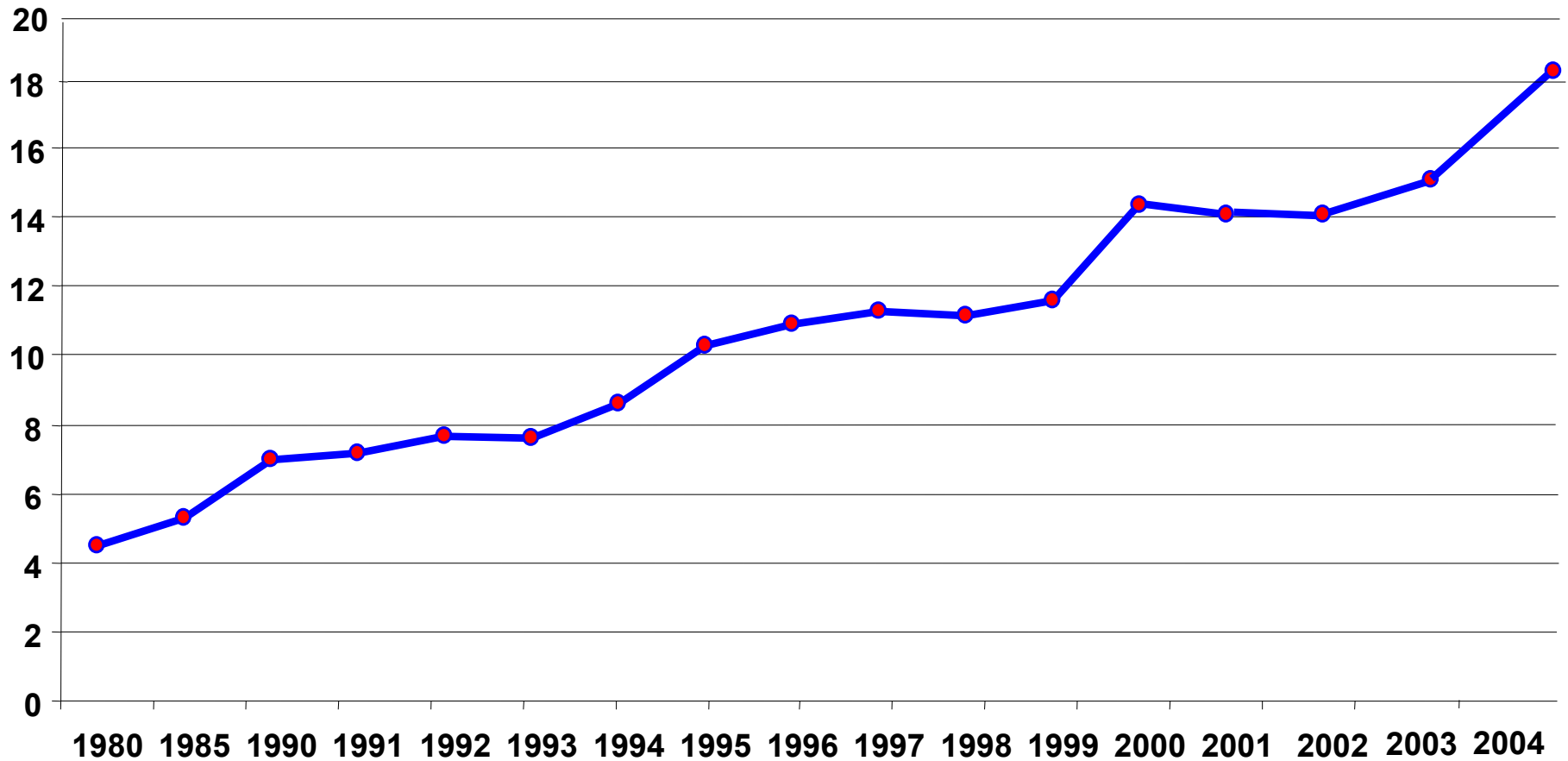


DESARROLLO DEL COMERCIO INTERNACIONAL

1980 = 4.5 TRILLONES DE USD

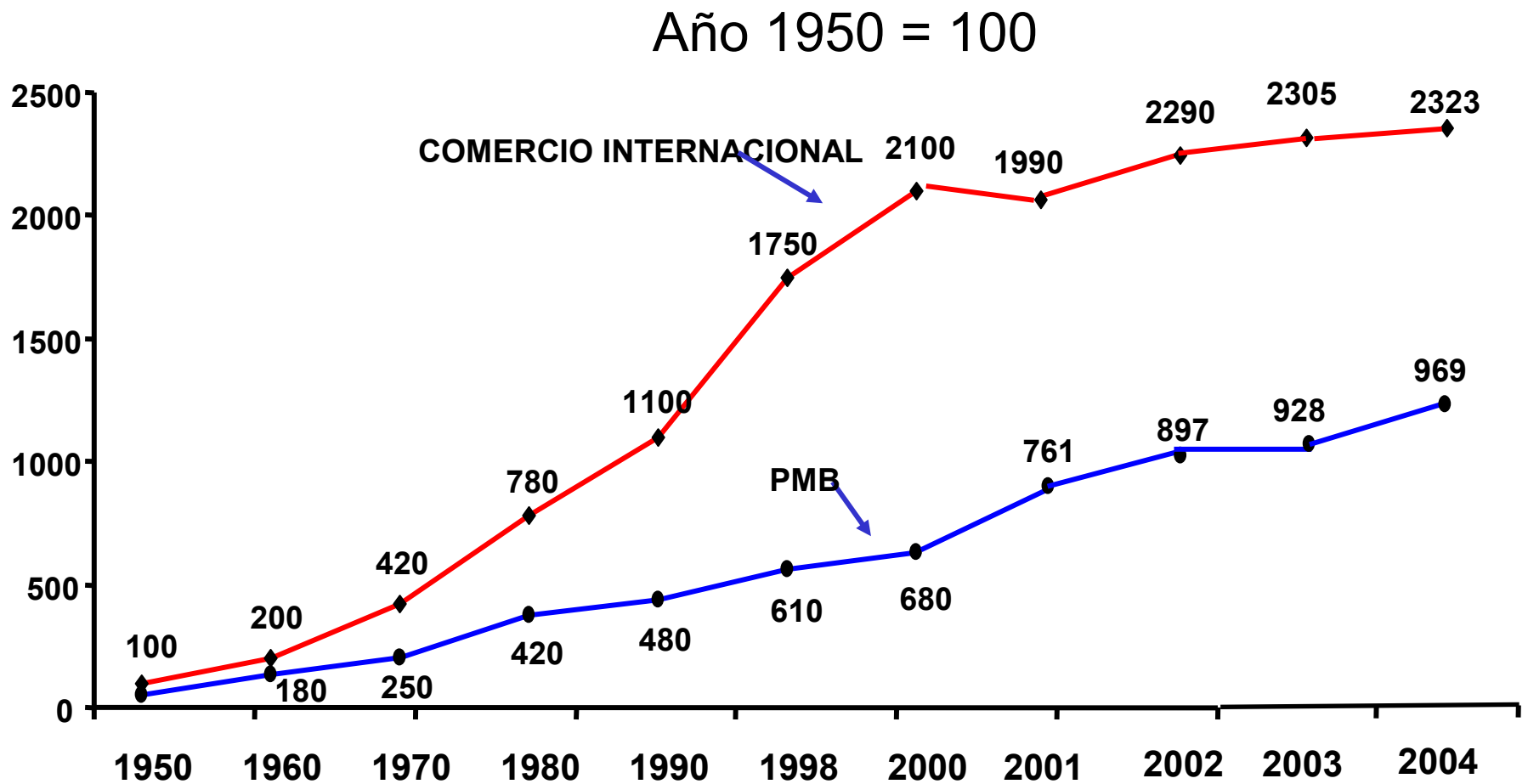
2004 = 18.6 TRILLONES DE USD

CRECIMIENTO DEL COMERCIO MUNDIAL



TCMA = 5.9%

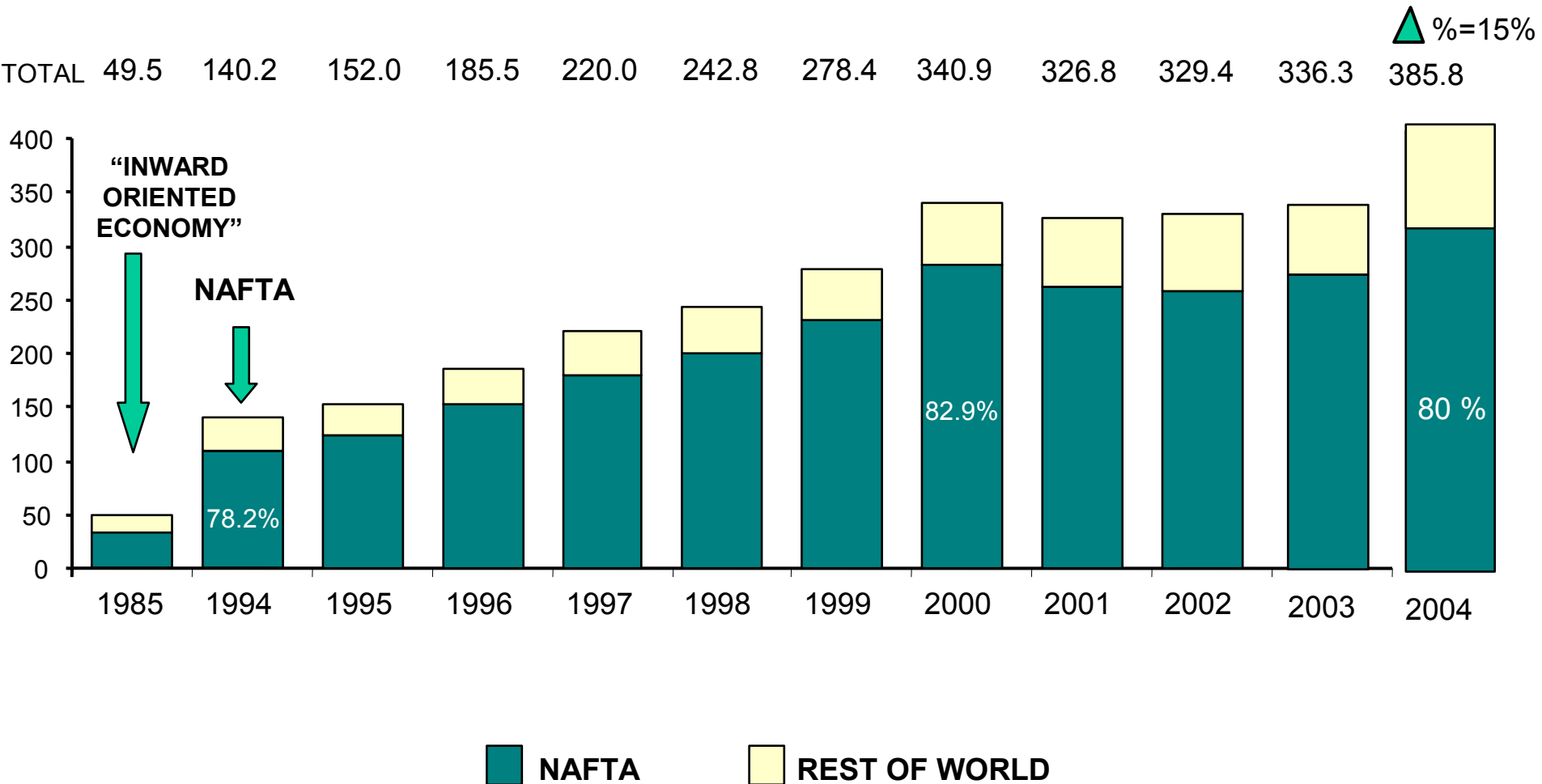
EVOLUCION DEL PRODUCTO MUNDIAL BRUTO Y DEL COMERCIO INTERNACIONAL



MEXICO'S INTERNATIONAL TRADE BY REGION

1985 - 2004

(Billion dlls.)



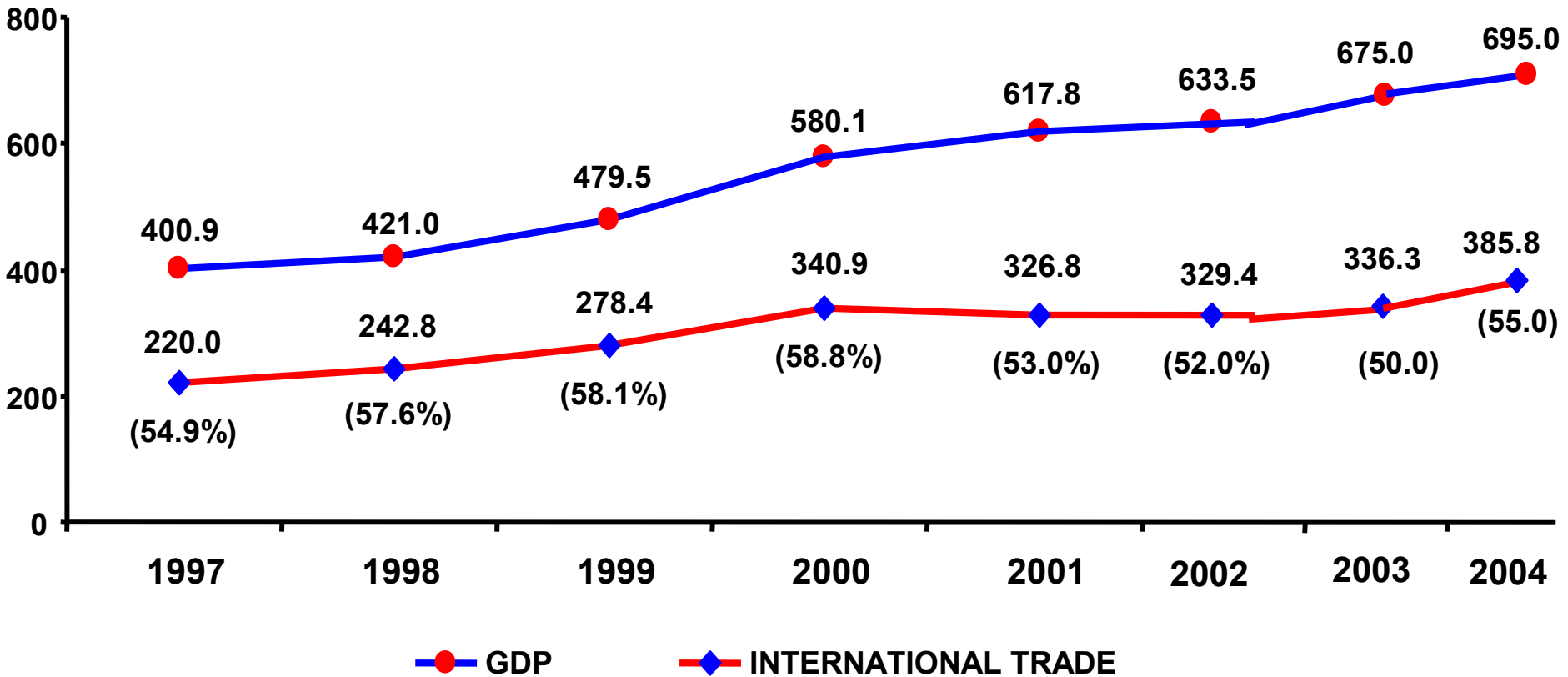
NOTA: oil exports included

Source: BANCOMEXT, S.N.C.

EVOLUTION MEXICO'S GDP AND INTERNATIONAL TRADE EVOLUTION

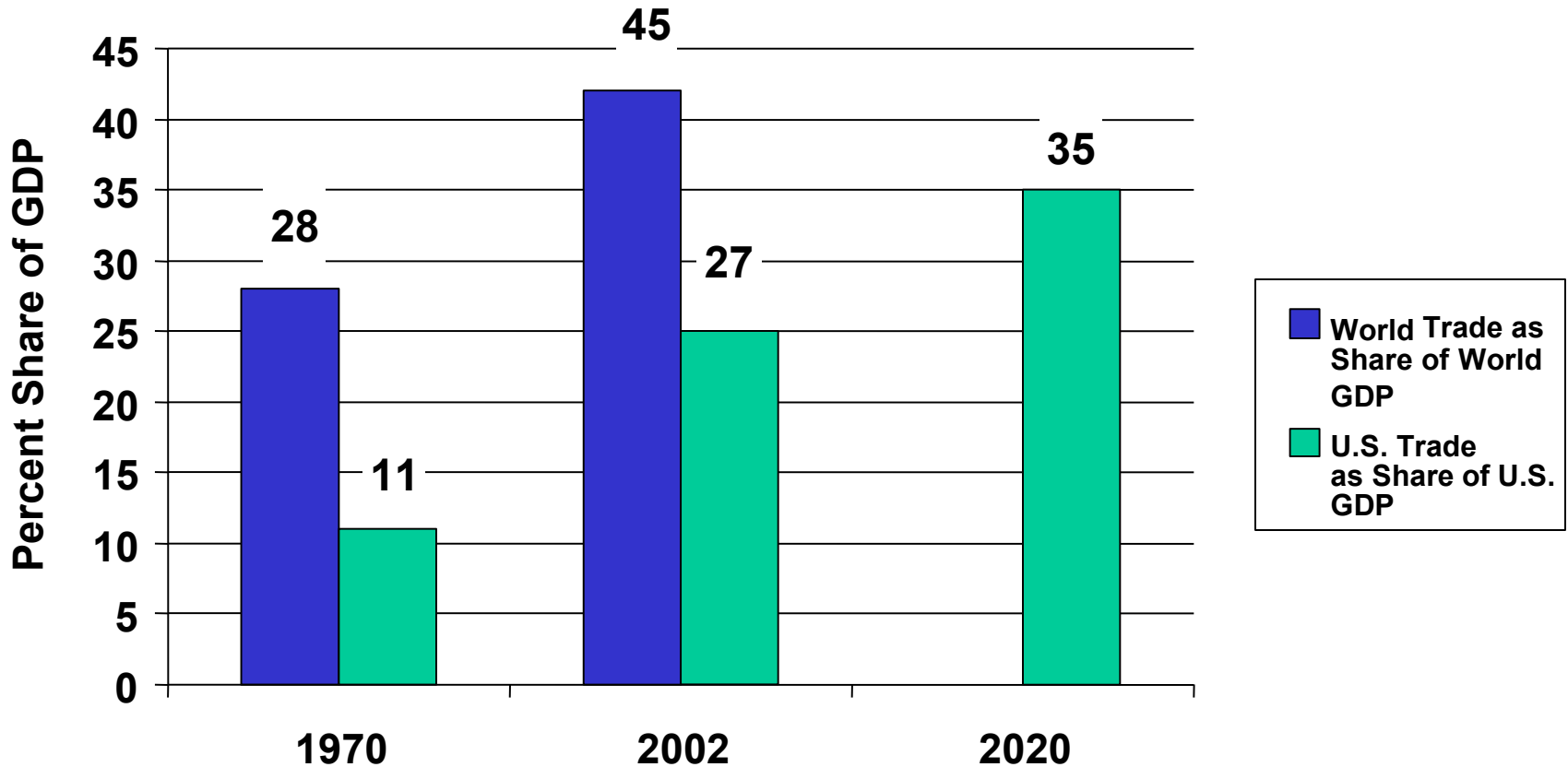
(Billions of \$USD)

The Mexican international trade is equivalent to 55% of this GDP



World and U.S. Merchandise Trade

Trade is growing and now accounts for over 27% of U.S. GDP, up from 11% in 1970...it is expected to increase to 35% by 2020



Source: World Bank, Bancomext and Federal Highway Administration

US FREIGHT GROWTH RATES (Post 9/11 forecast)

Total movement (yr 2002) 10 billion tons
Domestic: 8.5 billion tons
International: 1.5 Billion tons

TONNAGE
FORECAST
2002-2020

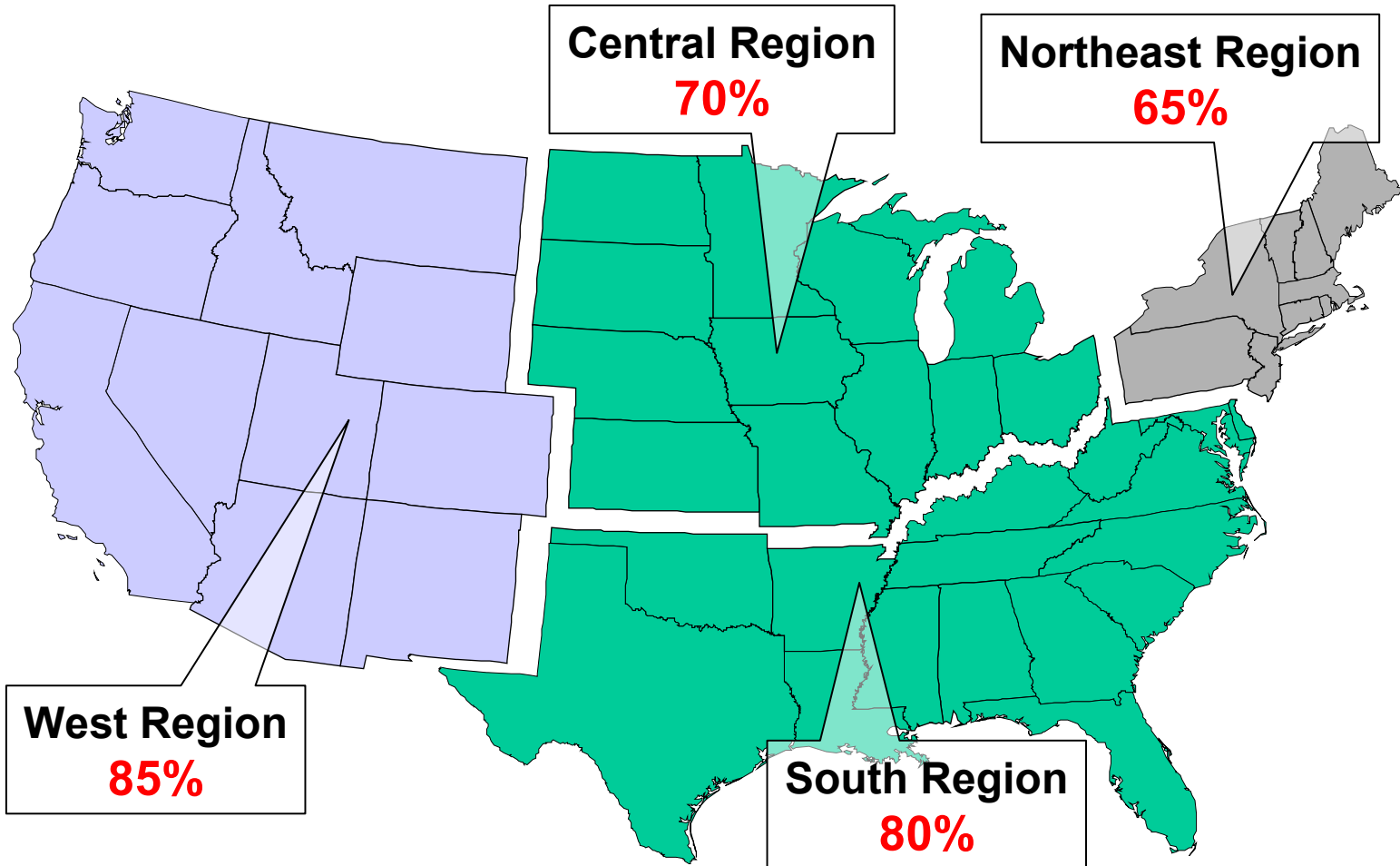
DOMESTIC

- AAGR = 2.4%
- CUMULATIVE = 113%

INTERNATIONAL

- US/CANADA = 2.8%/ year (99% total)
- US/MEXICO = 5.4%/year (217% total)
- US/ROW = 2.6%/year (77% total)

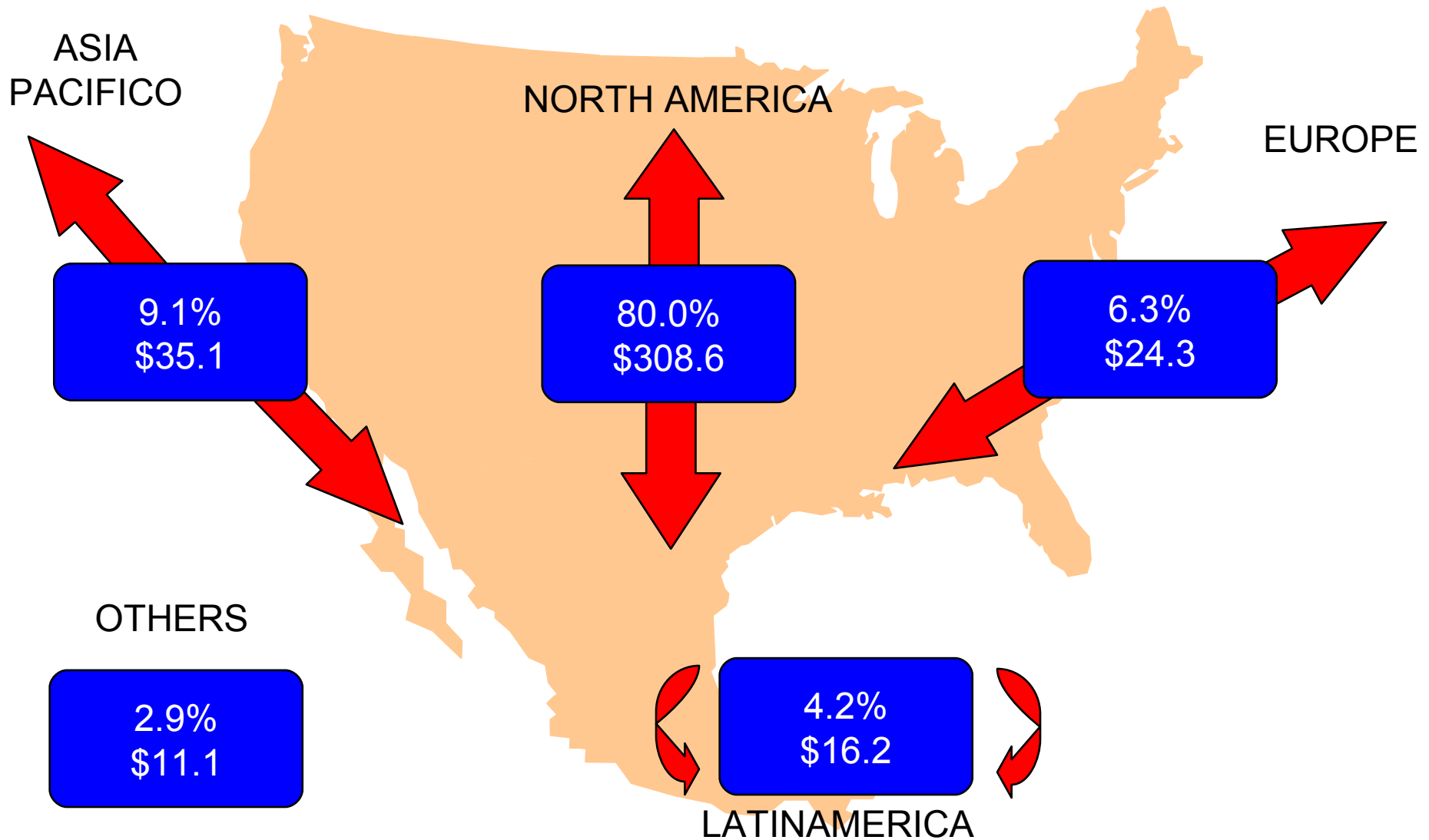
Freight Tonnage Growth Forecast by Region, 2000-2020



Source: Transearch and HWA Freight Analysis Framework Project

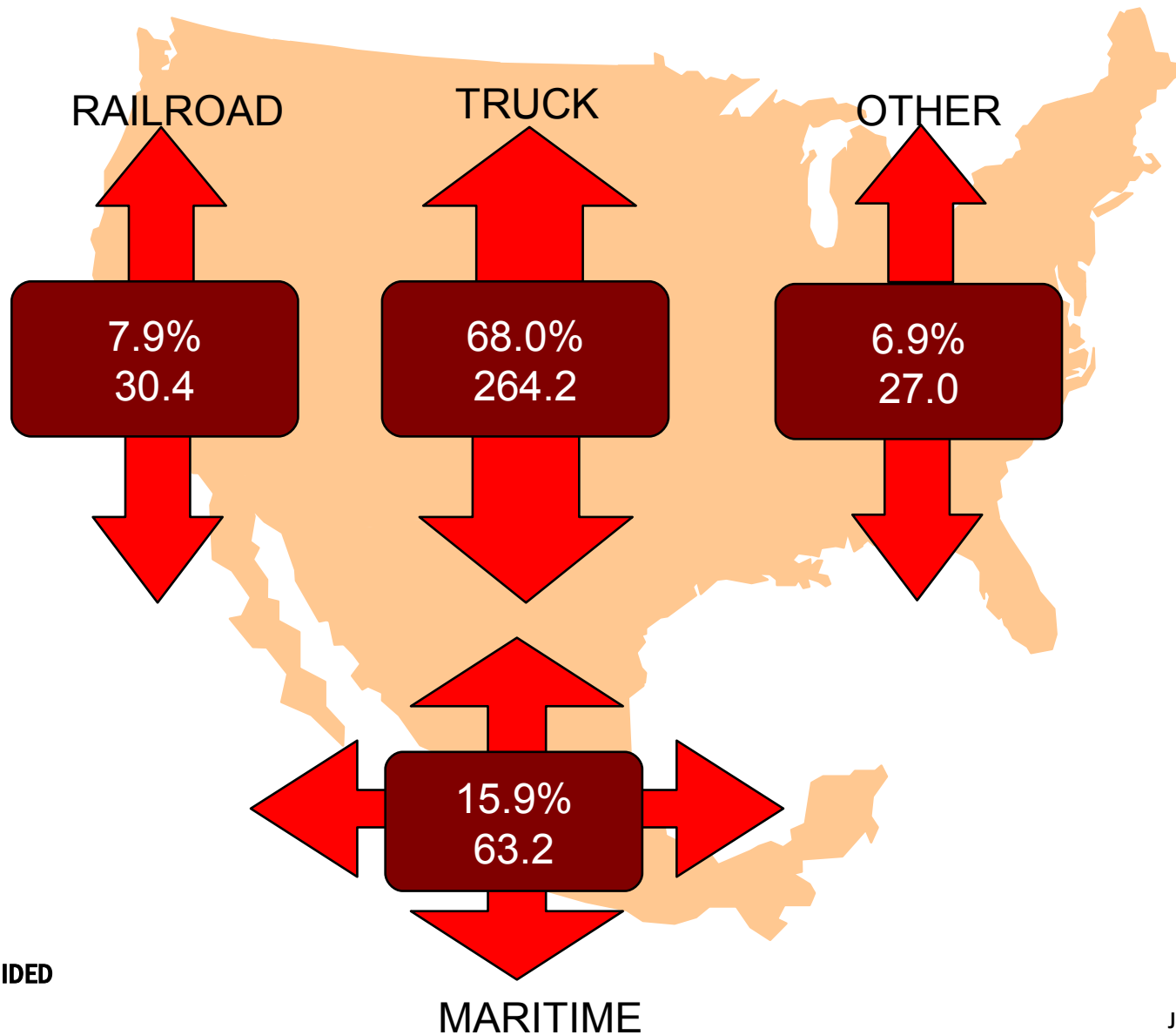
INTERNATIONAL TRADE OF MEXICO BY REGION 2004

TOTAL = \$ 385.8 BILLION USD



INTERNATIONAL TRADE OF MEXICO BY MODE OF TRANSPORT 2004

TOTAL = \$ 385.8 m M USD

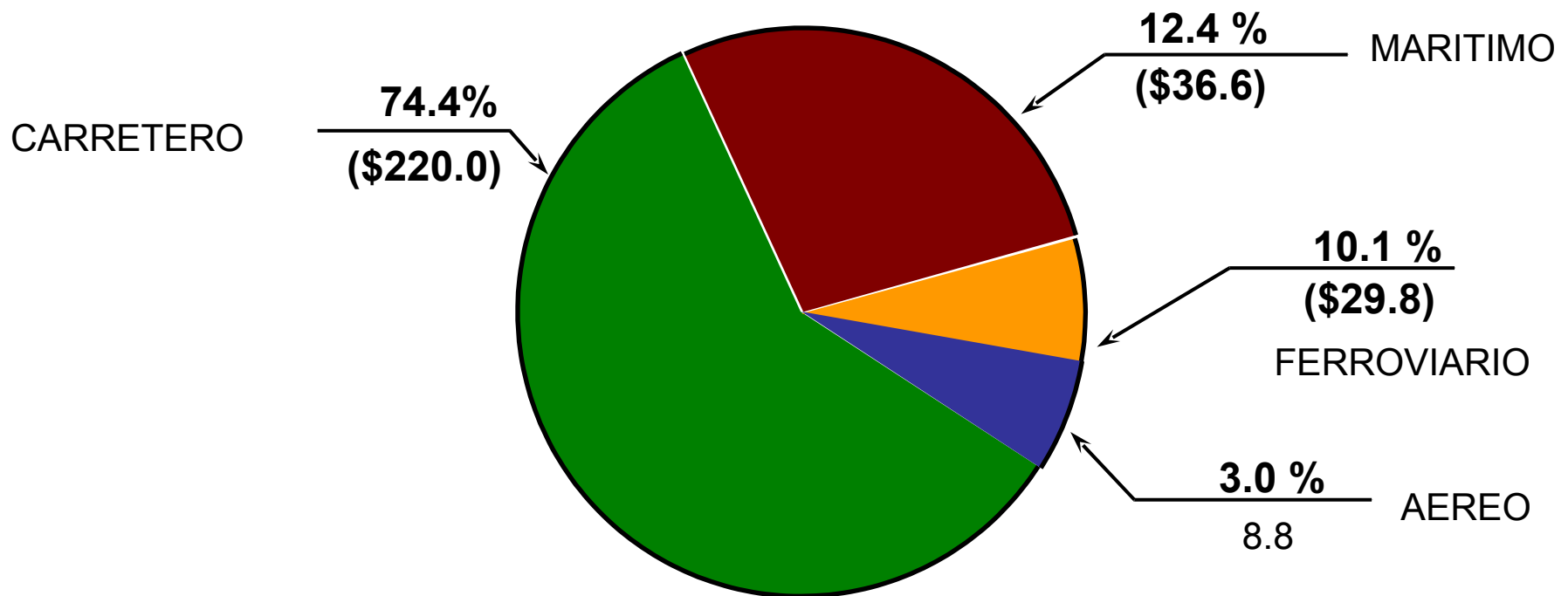


NOTA: OIL INCLUDED

SOURCE: SCT

COMERCIO BINACIONAL MEXICO-ESTADOS UNIDOS POR MODO DE TRANSPORTE 2004

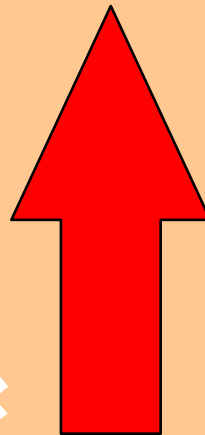
TOTAL: \$295.7 MIL MILLONES DE DLS.



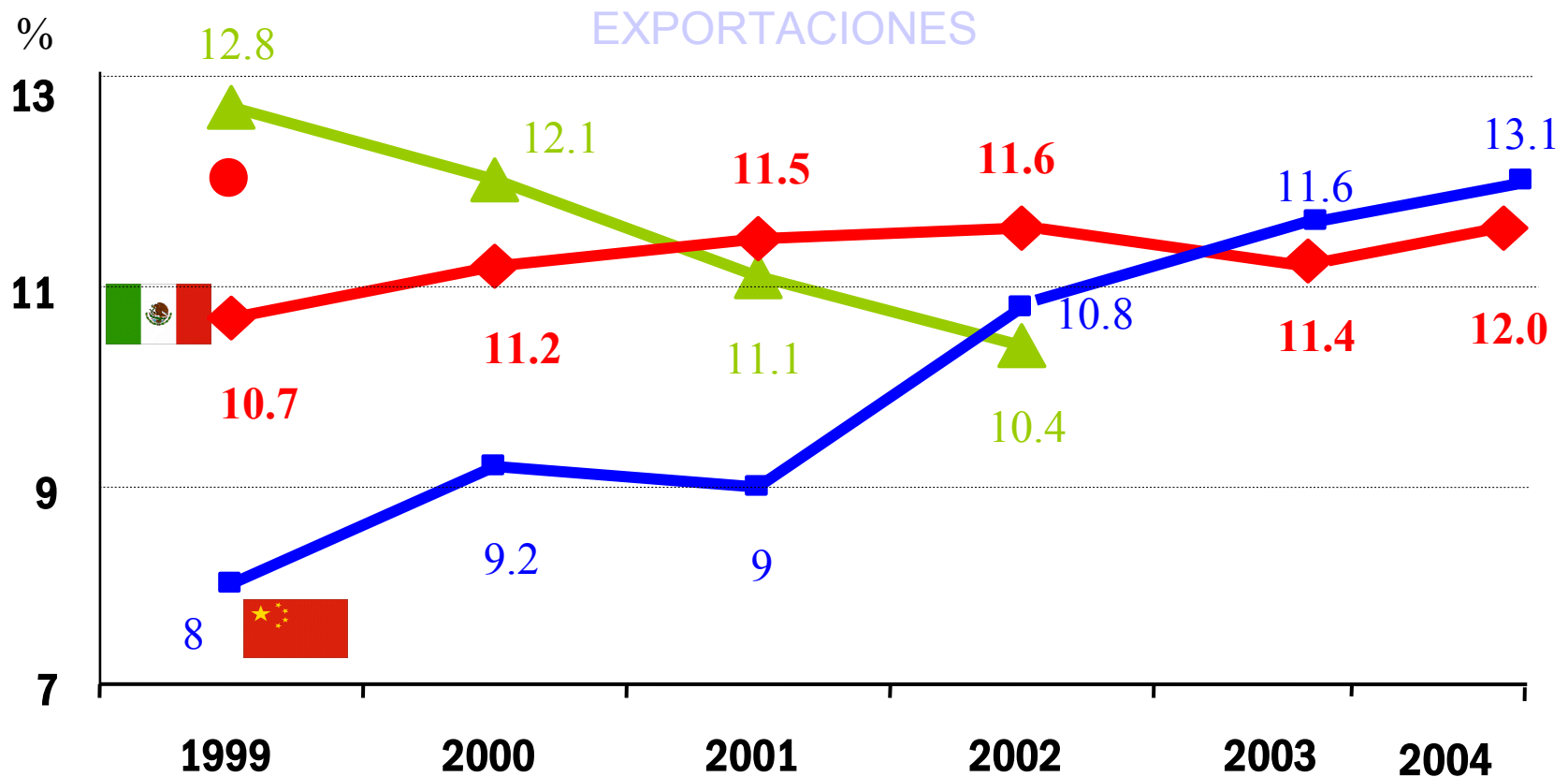
TRANSPORTE TRANSFRONTERIZO: \$ 236 mil millones (80 %)

MOVIMIENTO DE PASAJEROS MEXICO-EUA 2003 (Millones)

	# de vehículos	# pasajeros
Automoviles	88.1	193.7
Autobuses	0.32	3.75
Peatones		48.7
	TOTAL	246.15



PARTICIPACION DE LOS PRINCIPALES COMPETIDORES DE MEXICO EN EL MERCADO DE ESTADOS UNIDOS



CRECIMIENTO DE LA INFLUENCIA DEL LEJANO ORIENTE EN NAFTA 2005

COMERCIO INTERNACIONAL MEXICO-CHINA

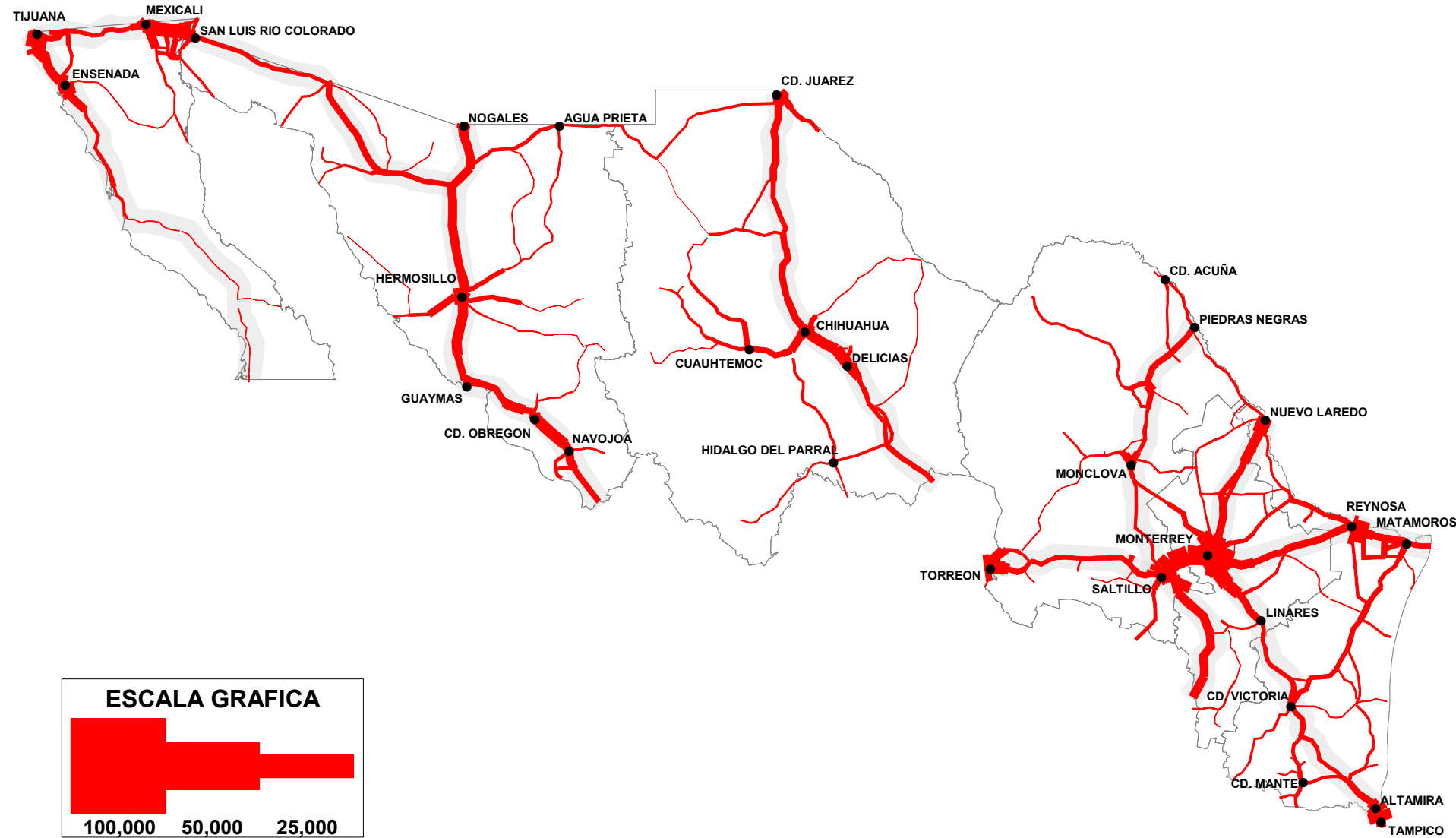
- ➔ México importa de China cerca de \$ 12 mil millones de dls.
- ➔ México exporta a China alrededor de \$ 600 millones de dls.
- ➔ El déficit comercial para México es de \$11 mil 400 millones de dls.

COMERCIO INTERNACIONAL EUA- CHINA

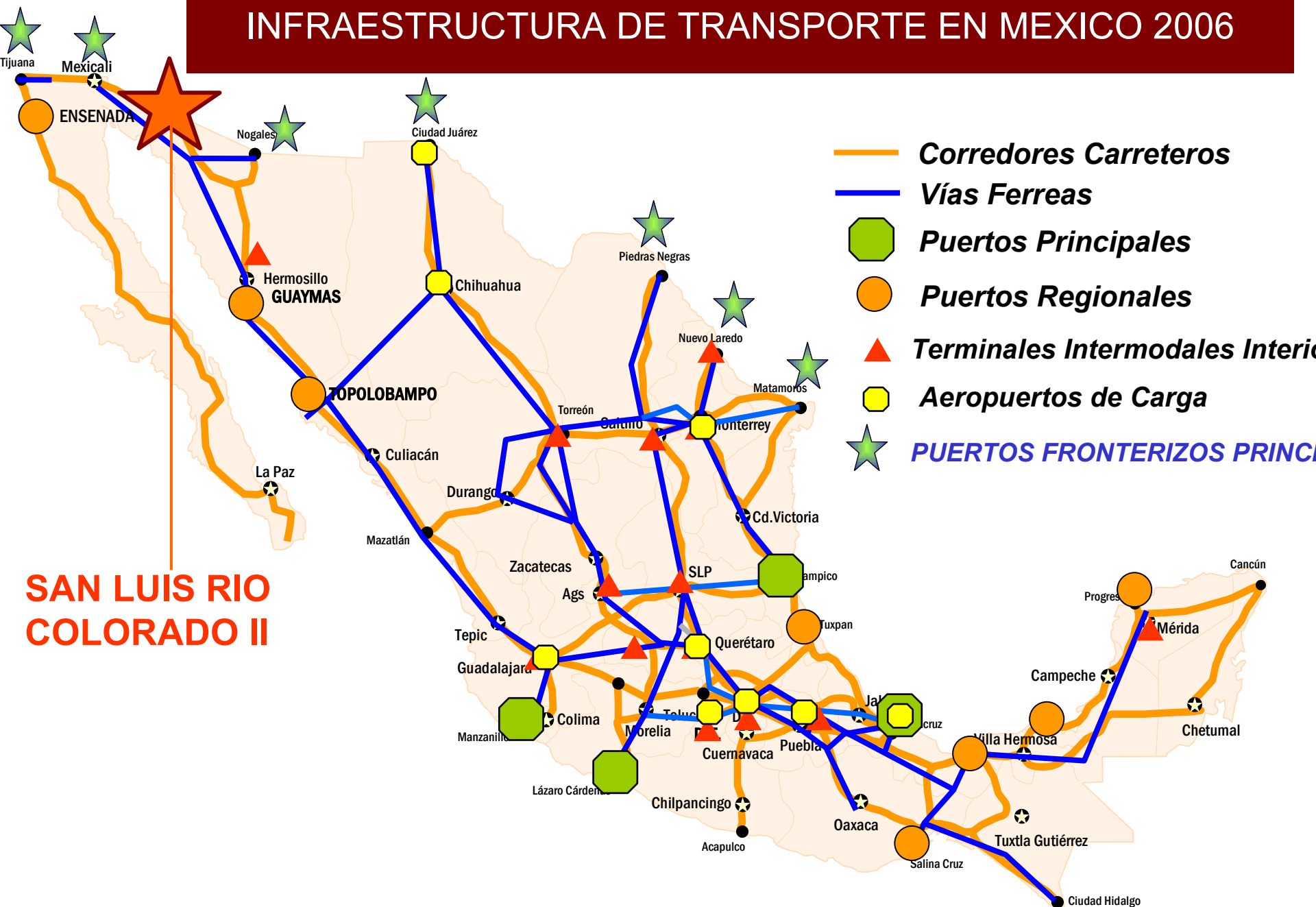
- ➔ Estados Unidos importa de China \$170 mil millones de dls.
- ➔ Estados Unidos exporta a China \$34 mil millones de dls.
- ➔ El déficit comercial para EUA es de \$ 136 mil millones de dls.

La región del NAFTA tiene que tratar de lograr un mejor equilibrio comercial con otras regiones del mundo

TPDA EN LA RED CARRETERA DE LA FRONTERA NORTE DE MEXICO



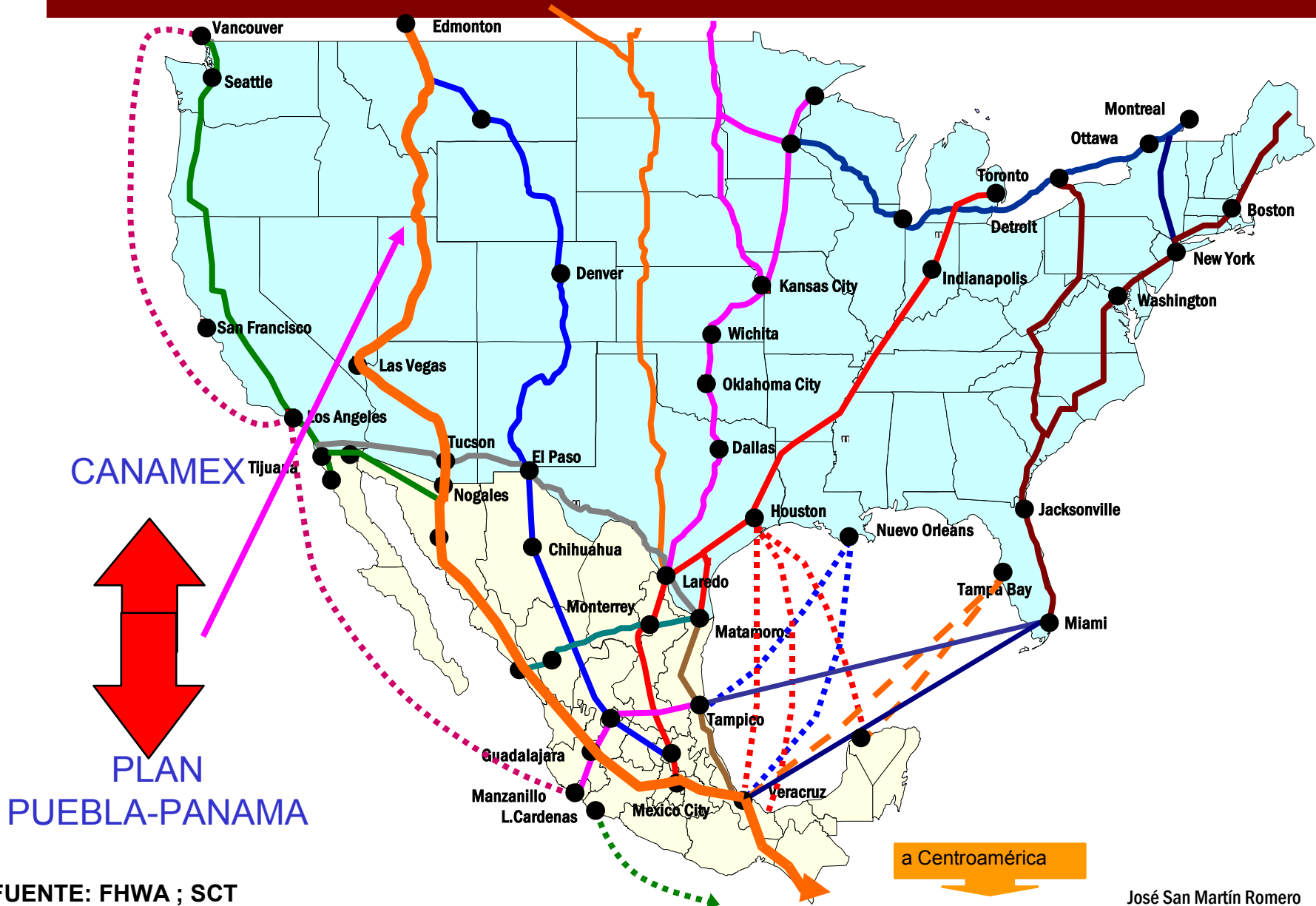
INFRAESTRUCTURA DE TRANSPORTE EN MEXICO 2006



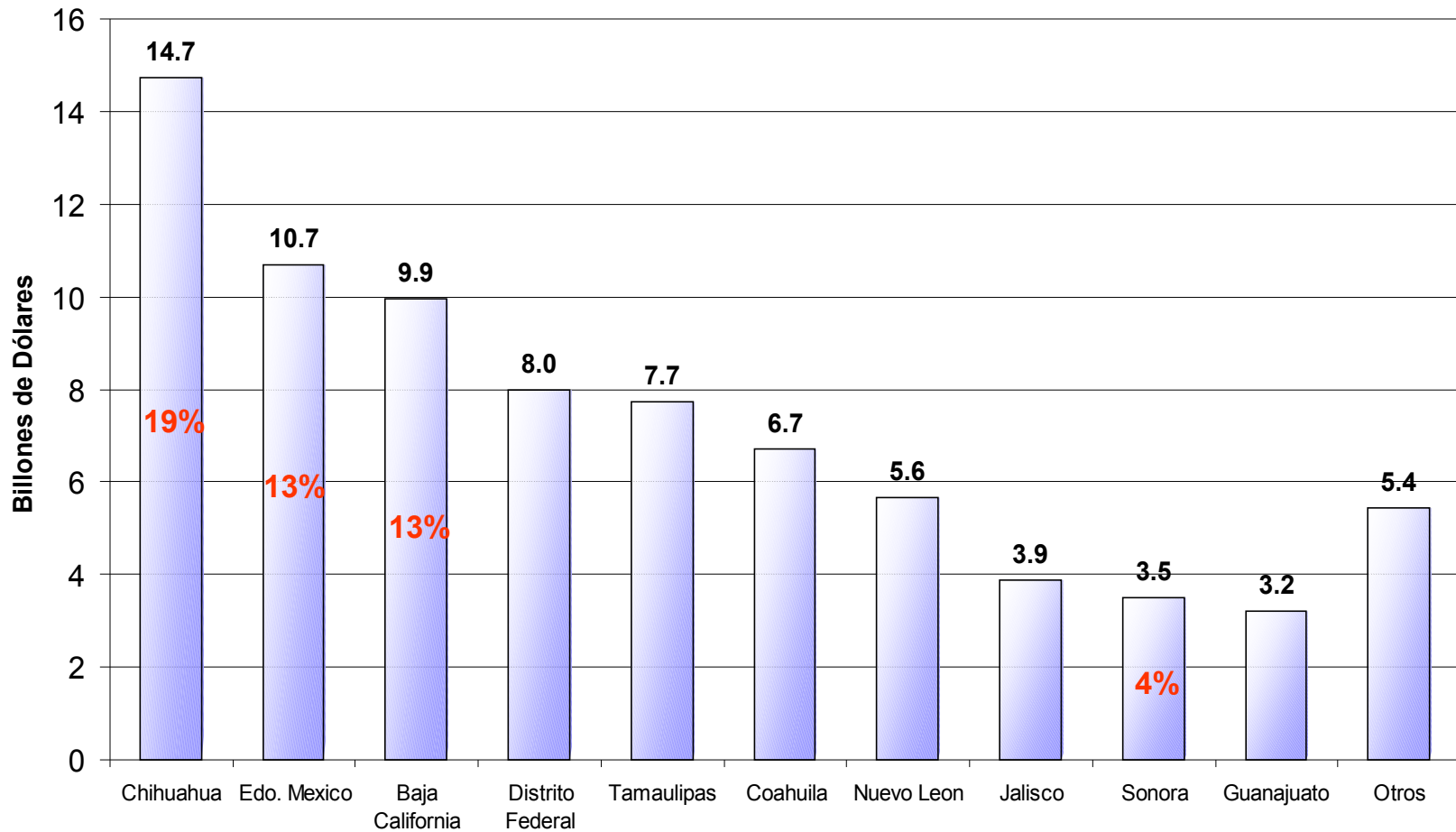
**SAN LUIS RIO
COLORADO II**

- **Corredores Carreteros**
- **Vías Ferreas**
- ◻ **Puertos Principales**
- **Puertos Regionales**
- ▲ **Terminales Intermodales Interiores**
- ◻ **Aeropuertos de Carga**
- ★ **PUERTOS FRONTERIZOS PRINCIPALES**

DESARROLLO DE CORREDORES ESTRATÉGICOS NORTEAMERICANOS SISTEMAS CARRETERO Y MARITIMO



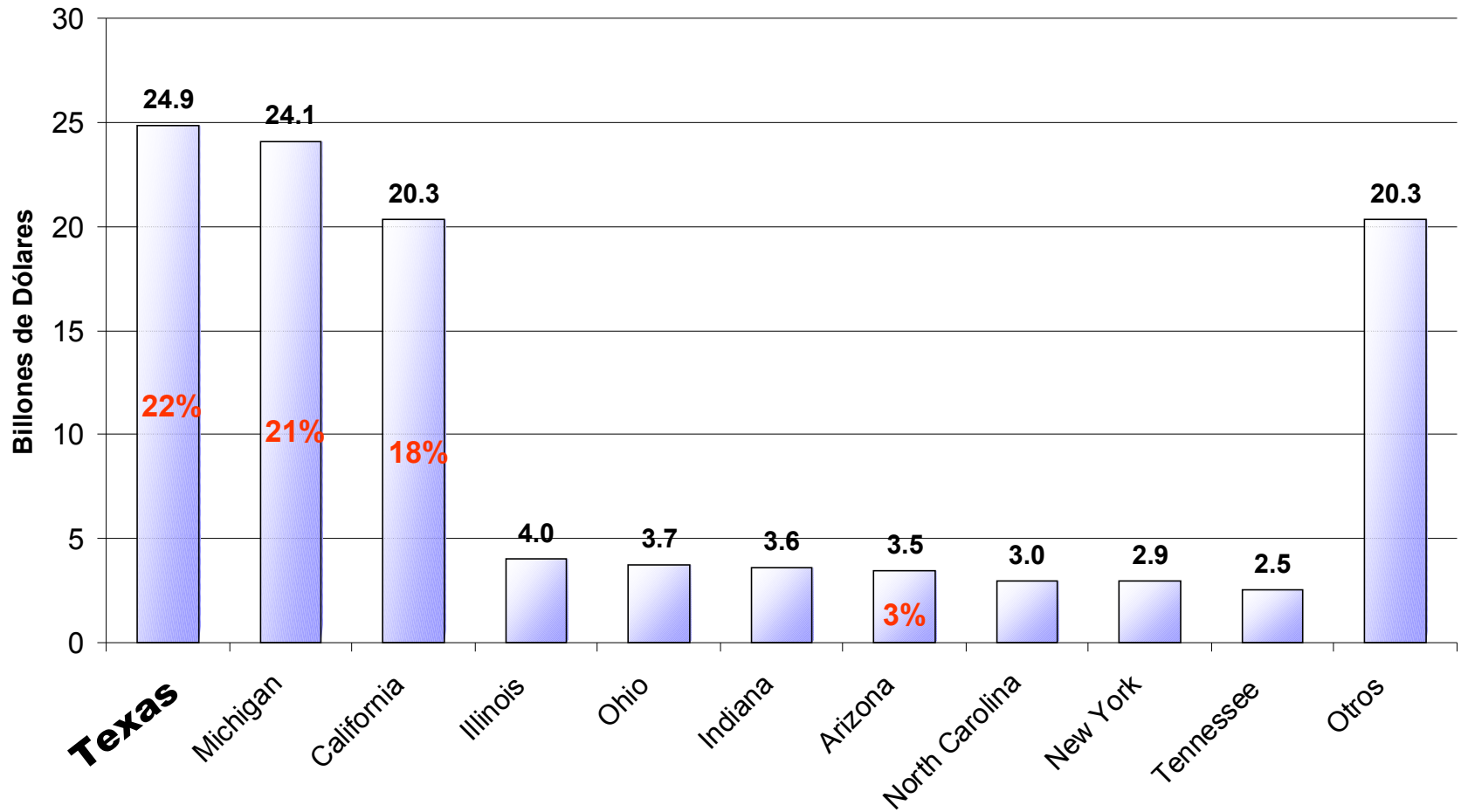
PRINCIPALES DESTINOS DE LAS EXPORTACIONES EUA - MÉXICO 2003



FUENTE: US Department of Transportation, Bureau of Transportation Statistics, Transborder Surface Freight Data

El Estado de Sonora recibe únicamente el 4% de las exportaciones de EUA a México.

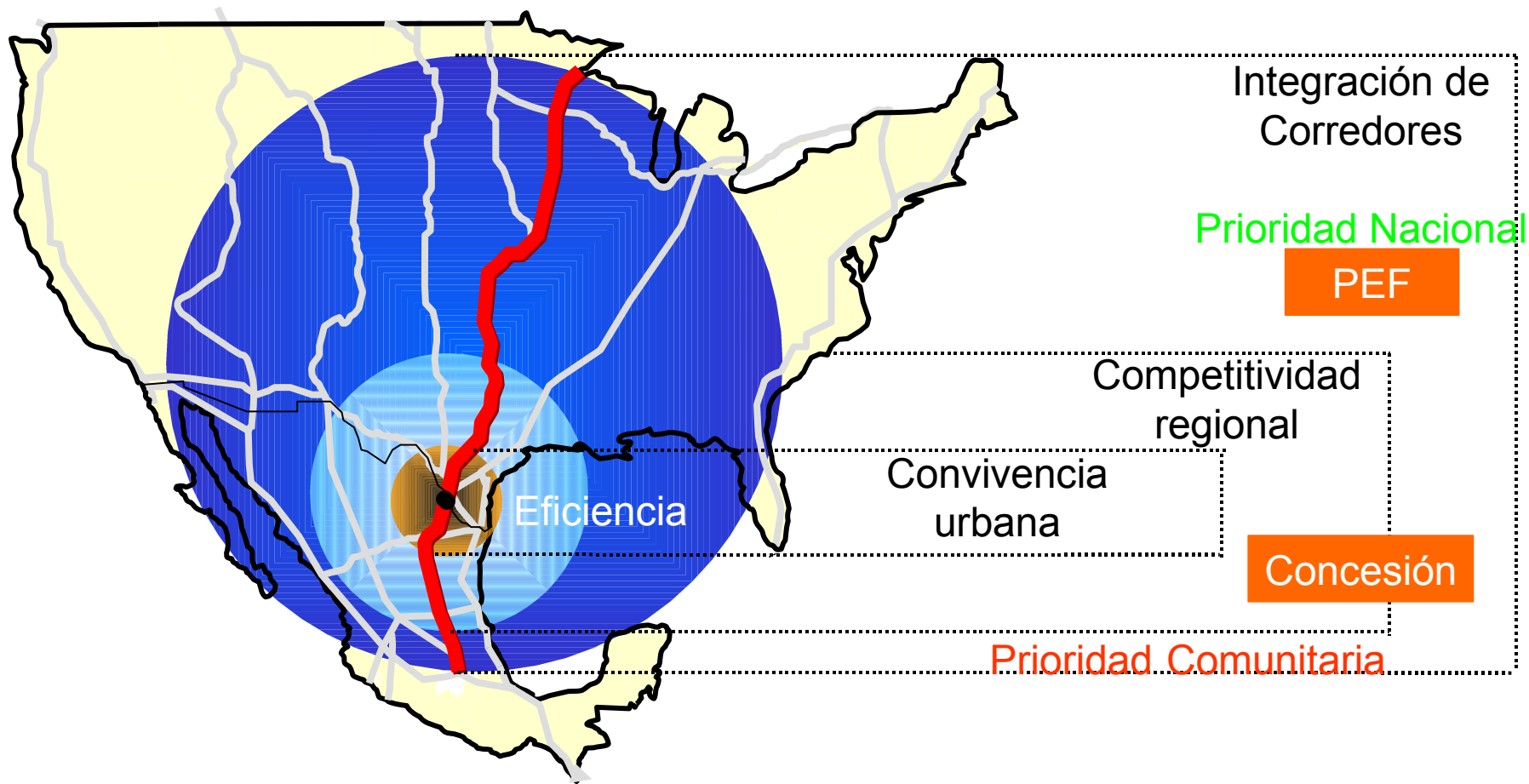
PRINCIPALES DESTINOS DE LAS EXPORTACIONES MEXICO – EUA 2003



FUENTE: US Department of Transportation, Bureau of Transportation Statistics, Transborder Surface Freight Data

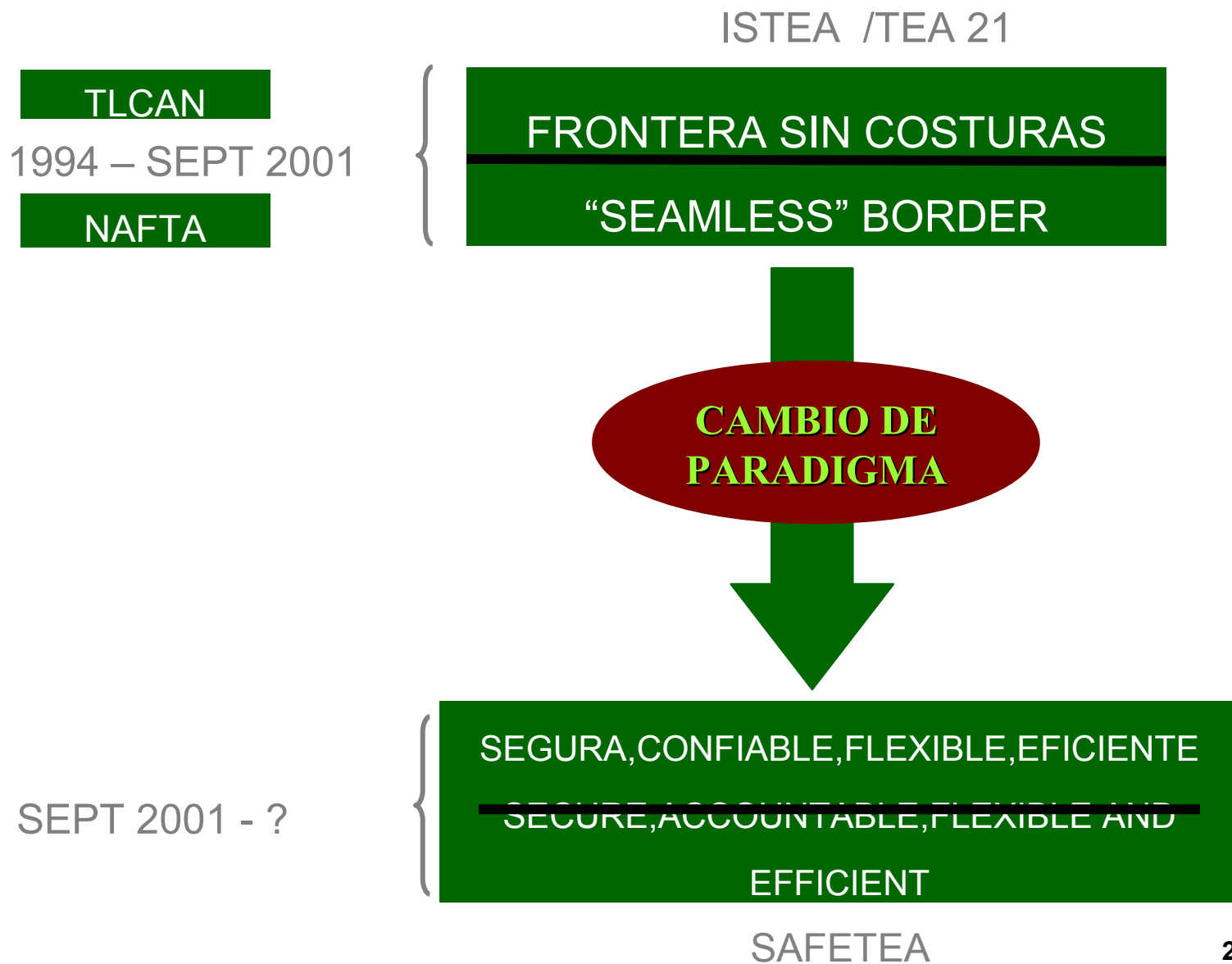
El Estado de Arizona recibe únicamente el 3% de las exportaciones mexicanas a EUA.

ESTRATEGIA GENERAL DE TRANSPORTE BINACIONAL



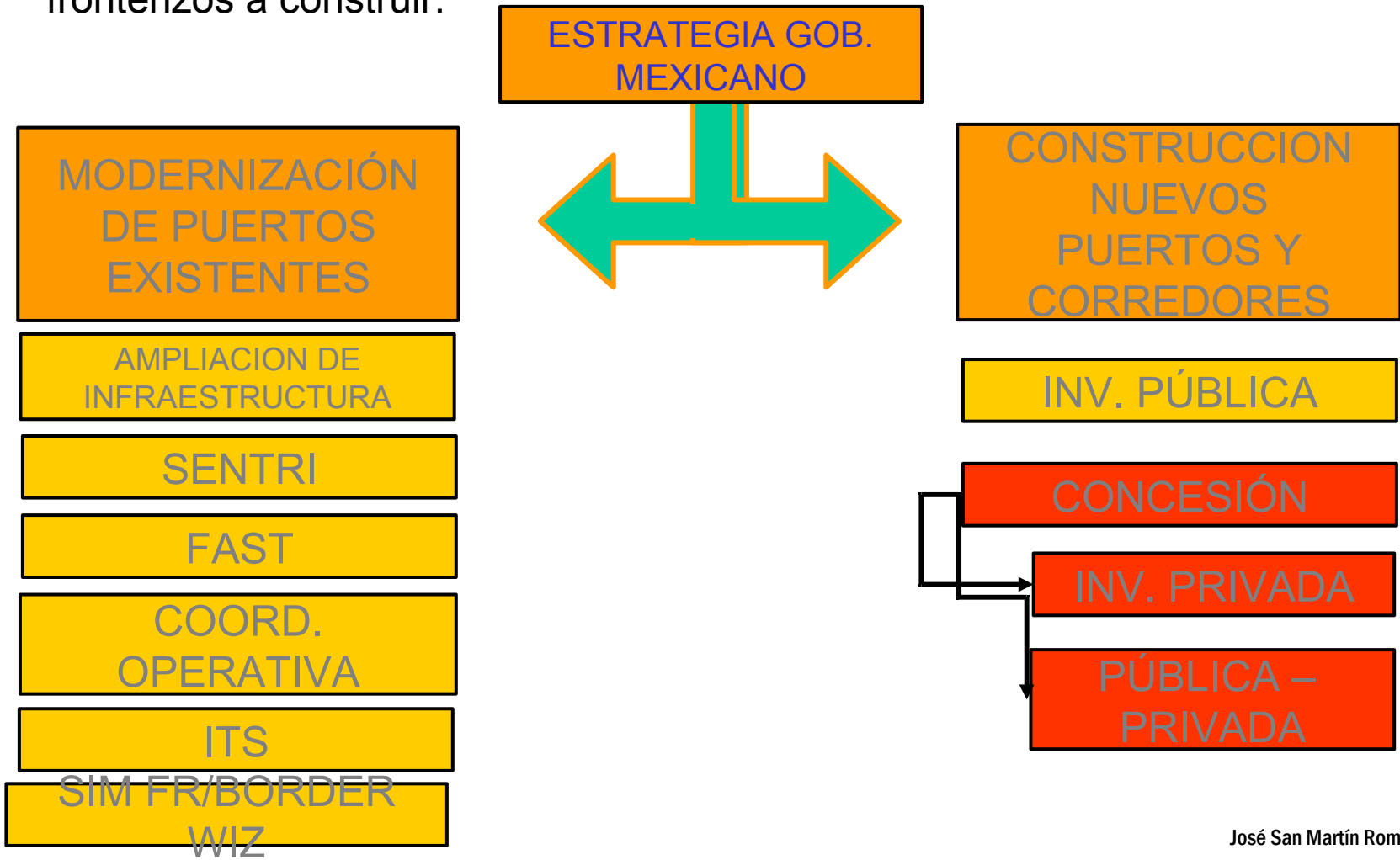
Seguridad territorial y operativa

ES NECESARIO TOMAR EN CUENTA EL NUEVO PARADIGMA PARA EL COMERCIO Y TRANSPORTE TRANSFRONTERIZO MEXICO-EUA-CANADA



IMPORTANCIA DE LOS PUERTOS FRONTERIZOS

- La seguridad y eficiencia de los puertos fronterizos es clave para la competitividad global vs. otros bloques económicos
- El Gobierno Mexicano trabaja en una estrategia de modernización de los puertos existentes, así como en la determinación de nuevos puertos fronterizos a construir.



OPTIMIZATION OF THE BORDER PORTS OF ENTRY SYSTEMS

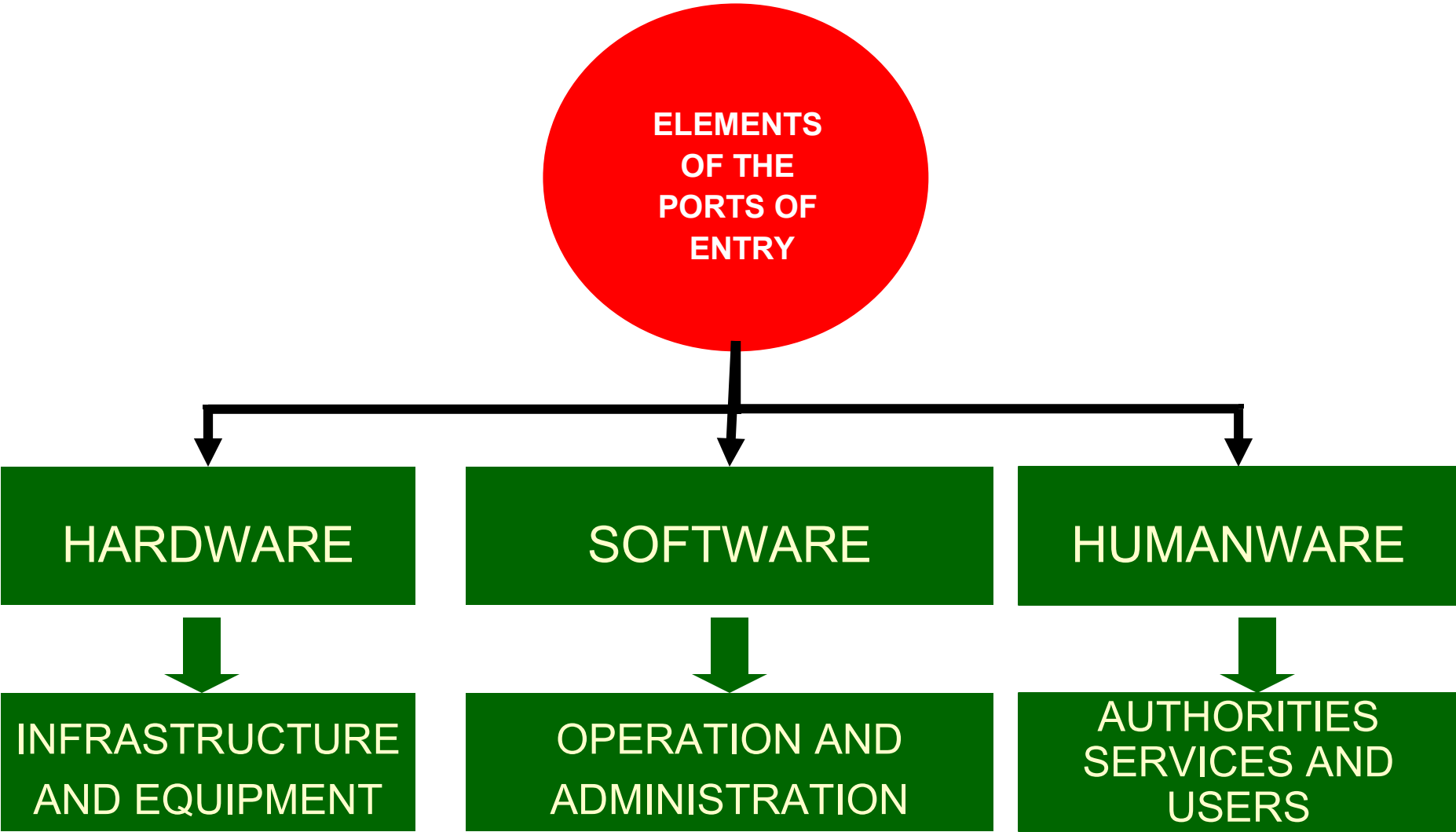


POLICY MAKING
INSTITUTIONAL
AGREEMENTS
BINATIONAL
STRATEGIES

FRAMEWORKS

- SECURITY AND SAFETY
- LEGAL
- REGULATORY / DE-REGULATORY
- ADMINISTRATIVE / INSTITUTIONAL
- COMMERCIAL (NAFTA)
- TECHNOLOGICAL
- LOGISTICS
- ENVIRONMENTAL
- SOCIAL
- CULTURAL

OPTIMIZATION OF THE BORDER PORTS OF ENTRY SYSTEMS



OPTIMIZATION OF THE BORDER PORTS OF ENTRY SYSTEMS

“HARD”
ELEMENTS



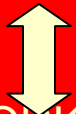
INFRASTRUCTURE

E

- BRIDGES AND CROSSINGS
- BUILDINGS
- INSPECTION AREAS
- WAREHOUSES AND YARDS (TRUCK & RAIL)
- HIGHWAY CORRIDORS
- RAILWAY CORRIDORS
- INTERMODAL CORRIDORS
- HIGHWAY ACCESSES AND BY-PASSES
- RAILWAY ACCESSES AND BY-PASSES
- INTERMODAL TERMINALS
- EQUIPMENT
- MAINTENANCE AND REHABILITATION
- SIGNALING
- TRANSPORT EQUIPMENT
- OTHERS

OPTIMIZATION OF THE BORDER PORTS OF ENTRY SYSTEMS

“SOFT” ELEMENTS



WORKING

PROCESSES

PROCEDURES AND

SYSTEMS

- ORGANIZATIONAL STRUCTURES
- BORDER DEVELOPMENT PLANNING
- ADMINISTRATIVE PROCESSES
- INSPECTION PROCEDURES
- OPERATING SYSTEMS
- PORTS OF ENTRY LAYOUT DESIGN
- INFORMATION SYSTEMS
- INTELLIGENT TRANSPORT SYSTEMS (ITS)
- CUSTOMS PROCEDURES
- SECURITY PROCEDURES
- MIGRATION FLOWS
- TRADE FLOWS LOGISTICS
- PASSENGER AND TOURISM FLOWS
- PERSONNEL TRAINING AND PROFESIONALIZATION
- CONNECTED SERVICES (3 PL's)
- BORDER CITIES URBAN DEVELOPMENT
- REGIONAL SUSTAINABLE DEVELOPMENT
- ENVIRONMENTAL AND SOCIAL ISSUES
- PORTS OF ENTRY COORDINATION

SÍNTESIS DE LA PROBLEMÁTICA GLOBAL EN PUERTOS FRONTERIZOS

- **Múltiples problemas de coordinación:**
 - Entre dependencias mexicanas.
 - Entre dependencias de EUA.
 - Binacionales, que se atenúan por relaciones personales mas no institucionales.
- **En los últimos 10 años el comercio ha crecido a tasas anuales de 2 dígitos, por lo que algunas instalaciones se han saturado.**
- **Cambios importantes en el perfil del usuario que requiere “atención personalizada”.**
- **No existen “estándares de desempeño”.**
- **Desequilibrios en la atención de asuntos de seguridad, congestionamiento y competitividad.**

Others Opportunities Areas of Logistics & Security

- Mexico and the US working on the development of transportation infrastructure have identified several areas as opportunities for logistic, safety and security through the following:
- Incorporation of ITS technology on transportation systems and border ports of entry.
- Fixing bottlenecks in the ports of entry and roadway approaches to the border POEs.
- SENTRI & FAST Lanes
- Development of operation simulation tools (Border Wizard/ Sim Fronteras) to improve the efficiency of border ports of entries.
- Geographic Information Systems (GIS)
- Development of binational transformation information exchange systems.
- New financing schemes for transportation infrastructure and inspection facilities at the border ports of entry