RENACIMIENTO MAYA
YUCATÁN
GOBIERNO DEL ESTADO | 2024 ◇ 2030

SETY
SECRETARÍA DE ECONOMÍA Y TRABAJO DE YUCATÁN

# Plan Yucatán

## Industrial Policy of the State of Yucatán 2025–2050

### A Vision for Industrial Development, Competitiveness, and Quality Jobs

Cambridge Industrial Innovation Policy

UNIVERSITY OF CAMBRIDGE

RENACIMIENTO MAYA
YUCATÁN
GOBIERNO DEL ESTADO | 2024 - 2030
SETY
SECRETARÍA DE ECONOMÍA Y TRABAJO DE YUCATÁN

Design by www.dangould.co.uk and Deborah Harward.
Images from Adobe and Government of Yucatán.

# Contents

# Foreword

Yucatán is at a critical juncture when it comes to consolidating its economic development and defining the direction of its industrial future. The dynamism experienced by the state requires strategic vision, the capacity for coordination, and public policy grounded in evidence, planning, and a long-term perspective.

*Plan Yucatán: Industrial Policy of the State of Yucatán 2025–2050* is founded on the conviction that economic growth must be built through order, vision, and shared responsibility, avoiding fragmented efforts and directing public decision-making towards common objectives of competitiveness, prosperity, and sustainable development.

It is no coincidence that Yucatán is experiencing this important moment in its development. The expansion of the Port of Progreso, the arrival of the Maya Train freight service, the strengthening of logistics infrastructure, and the promotion of new industrial corridors are redefining the way our state connects with México and the world. These projects represent a historic opportunity to position Yucatán as a strategic hub for manufacturing, logistics, innovation, and trade in the south-east of the country.

In the Ministry of Economy and Labour, we undertook an extensive analytical exercise in collaboration with the Institute for Manufacturing at the University of Cambridge, with the support of Open Society Foundations, to identify the capabilities, challenges, and opportunities shaping Yucatán's productive development. This process enabled us to examine strategic issues such as human talent, energy infrastructure, logistics connectivity, business capabilities, and the sectors with the greatest potential to strengthen the state's competitiveness in the coming decades.

This effort is based on a fundamental premise: government decisions must respond to the real needs of Yucatán. For this reason, this policy has been developed through evidence, dialogue, and identifying factors that can drive more robust, competitive, and inclusive industrial development. This document translates that effort into a clear roadmap for action to prepare the talent required by emerging industries, strengthen the infrastructure, energy, and logistics conditions that will support economic growth, and strategically leverage the port expansion, freight railway, and industrial corridors.

The objective is to ensure that this development results in tangible opportunities for Yucatán's families, better-paid jobs, more competitive businesses, and greater integration of our productive enterprises into regional, national, and international value chains.

In the spirit of the Maya Renaissance, "Renacimiento Maya", we understand that Yucatán's industrial development is not separate from our identity. On the contrary, it is a contemporary expression of it, reflecting the organisational capacity, collective effort, talent, and strong sense of belonging that have distinguished this land for generations, now serving a modern, competitive, and inclusive economy. From the Ministry of Economy and Labour, we will continue to drive this process forward with responsibility and commitment, so that Yucatán not only takes advantage of the opportunities before it but also strategically channels them for the benefit of its people, its businesses, and the future we are building together.

**Jorge Ermilo Barrera Novelo**

**Minister of Economy and Labour of the State of Yucatán**

# Executive summary

## Yucatán 2050: A Vision for Industrial Renaissance

**The administration led by President Claudia Sheinbaum Pardo marks a new chapter in México's productive development policy.** Through Plan México, the Federal Government has reaffirmed the role of industrial policy as a fundamental instrument for enhancing competitiveness, attracting investment, strengthening national technological capabilities, accelerating the development of strategic sectors, and ensuring that the benefits of economic growth translate into shared prosperity for the population.

**Yucatán has a historic opportunity to embark upon a new phase of economic development.** The reorganisation of global supply chains, the relocation of investment to North America, the energy transition, and rapid technological change are reshaping the world economy. Those regions able to develop talent, innovation, infrastructure, and productive capabilities will be best placed to capture the benefits of this new industrial era. And Yucatán has the foundations to be one of them.

### *The potential for transformation is significant*

*Closing the productivity gap with the rest of the country could generate over USD700 million in additional economic output each year for Yucatán's economy.*

**Plan Yucatán: Industrial Policy of the State of Yucatán 2025–2050 is founded on a fundamental premise: economic growth alone does not guarantee prosperity.** Although Yucatán is one of México's most dynamic economies, recording the country's second-highest rate of economic growth between 2014 and 2024, significant challenges remain in relation to productivity, wages, innovation, and inclusion.

### *Yucatán 2050: the future we are building today*

*The aim is to establish Yucatán as a national and international leader in sustainable, competitive, and inclusive industrial development, where industry is the engine of economic growth, quality employment, and social wellbeing. By 2050, Yucatán will be one of México's most competitive and sustainable states, recognised for its leadership in innovation, the strength of its high-value-added industries, its highly skilled workforce, and its capacity to generate shared prosperity.*

## A state positioned for investment and growth

**The state combines a set of attributes that rarely converge within a single territory:** institutional stability, a high quality of life, public safety, a strategic location between the Gulf of Mexico and the Caribbean, a strong network of higher education and research institutions, manufacturing strength, and expanding logistics and energy infrastructure.

**Located in south-eastern México, Yucatán stands out as one of the safest and most peaceful states in the country, providing an ideal environment for business development and investment.**

*Figure ES-1. Yucatán: a unique combination of strengths*

**STABILITY & SECURITY**

A trusted environment for investment and long-term growth

**QUALITY OF LIFE**

A high standard of living supported by excellent services and cultural amenities

**STRATEGIC LOCATION**

A gateway connecting key markets across the Gulf of Mexico and the Caribbean

**TALENT AND RESEARCH EXCELLENCE**

World-class universities, research institutions and a skilled workforce

**MANUFACTURING STRENGTH**

A competitive industrial base with expertise across automotive, aerospace, food and apparel manufacturing

**The state has established itself as one of the leading industrial hubs in southern and south-eastern México.** Yucatán's manufacturing sector generates around 40% of the manufacturing value added produced in the country's south-eastern region, accounts for 22% of Yucatán's employment, and represents more than 90% of the state's goods exports.

**This industrial strength combines a solid foundation in traditional sectors, such as food and beverages and apparel manufacturing, with growing specialisation in more technologically sophisticated activities.** Particularly notable is the manufacture of transport equipment, which has become Yucatán's leading export sector, reflecting the state's increasing integration into national and international value chains.

**Yucatán also has one of the strongest scientific ecosystems in the country.** The state ranks third nationally in terms of the number of research centres, and seventh for scientific and technological laboratories. This scientific capacity represents an exceptional competitive advantage for developing knowledge-intensive industries, particularly in areas such as biotechnology, digital technologies, renewable energy, and advanced manufacturing.

**At the same time, Yucatán is building a world-class logistics platform.** The expansion and modernisation of the Port of Progreso will enable it to accommodate vessels of up to 60,000 tonnes and support the development of new specialised terminals linked to liquefied natural gas, green hydrogen, shipbuilding, and other high-value-added activities. Integration with the Maya Train freight service, the industrial corridors associated with the *Polos de Desarrollo para el Bienestar*, and the road network will strengthen regional and international connectivity, facilitating the integration of value chains and access to new markets.

**These strengths make Yucatán one of the most attractive platforms for investment in southern México and a strategic gateway to the markets of North America, Central America, the Caribbean, and Europe.**

## Five pillars for building Yucatán's industrial renaissance

Plan Yucatán: Industrial Policy of the State of Yucatán 2025–2050 sets out a comprehensive strategy based on five strategic pillars aimed at strengthening the fundamental capabilities required for long-term economic development. This strategy incorporates a cross-cutting vision of shared prosperity to ensure that economic growth translates into opportunity, social mobility, and wellbeing for all regions and population groups.

1. **Human talent,** focused on developing, attracting, and retaining the talent required to compete in advanced and knowledge-intensive industries.
2. **Strategic and sustainable industrial infrastructure,** aimed at establishing a logistics, energy, and digital platform with national and international reach.
3. **Innovation and technology for development,** focused on transforming science, technology, and knowledge into productive solutions, innovative businesses, and new industrial capabilities.
4. **Supply chain development and regional integration,** aimed at strengthening local supply chains, connecting the territory's productive capabilities, and integrating Yucatán's businesses into national and global value chains.
5. **Global engagement and investment attraction,** focused on positioning Yucatán as a competitive and trusted destination for investment through stronger connections with markets, companies, and strategic partners at both national and international levels.

*Table ES-1. Five strategic priorities for building a more competitive, innovative, inclusive, and sustainable Yucatán*

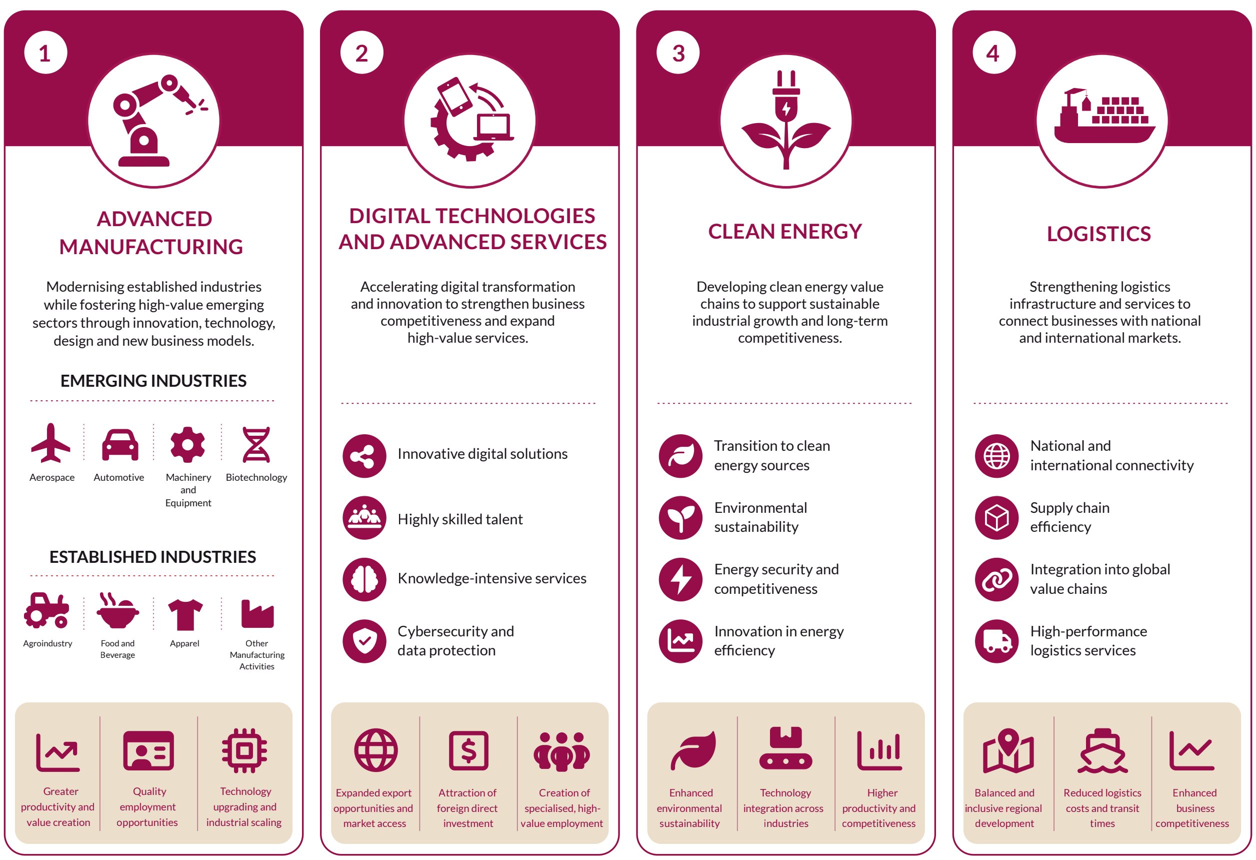
| Strategic pillar | 2030 | 2035 | 2040 | 2050 |
|---|---|---|---|---|
| **1. Human talent** | Build the talent capabilities required for industrial transformation | Scale talent development to support productive sophistication | Consolidate a competitive talent ecosystem | Yucatán is established as a national leader in the development, attraction, and retention of highly specialised talent, capable of driving advanced, knowledge-intensive, high-value-added industries. |
| **2. Strategic and sustainable industrial infrastructure** | Build the foundations for logistics and productive integration | Develop competitive industrial corridors | Position Yucatán as a regional industrial and logistics hub | Yucatán is established as the leading industrial and logistics hub in south-eastern México and a Latin American benchmark, with modern, sustainable infrastructure integrated into major national and international markets. |
| **3. Innovation and technology for development** | Build the capabilities for innovation and technological development | Scale innovation to support productive sophistication | Consolidate a leading innovation and technology ecosystem | Yucatán is established as a national and international leader in applied innovation, with an ecosystem that transforms science, technology, and knowledge into productive solutions, innovative businesses, and advanced industrial capabilities. |
| **4. Supply chain development and regional integration** | Build the foundations for local productive integration | Scale the development of regional value chains | Consolidate Yucatán's integration into national and international value chains | Yucatán is established as a strategic hub within national and global value chains, supported by a competitive, specialised local supply base that is deeply integrated into the state's industrial development. |
| **5. Global engagement and investment attraction** | Build the foundations of an attractive investment environment | Scale promotion and engagement with global markets | Consolidate Yucatán's position as a strategic investment destination | Yucatán is positioned as a global destination for high-value-added investment, recognised for its certainty, talent, infrastructure, and capacity to attract, develop, and retain long-term strategic projects. |

# The sectors that will drive Yucatán's future

The industrial development strategy focuses on four sectors with the potential to accelerate productive transformation, attract investment, and generate high-value-added employment.

1. **Advanced manufacturing**, including modernising traditional industries with the development of new capabilities in aerospace, automotive, machinery and equipment, and biotechnology.
2. **Digital technologies and advanced services,** driving artificial intelligence, data analytics, industrial automation, cybersecurity, and knowledge-based services.
3. **Clean energy,** leveraging the state's competitive advantages to participate in the energy transition and develop new industrial value chains linked to sustainable technologies.
4. **Logistics,** consolidating Yucatán's position as a strategic hub for trade, distribution, and supply chains serving México and North America.

*Figure ES-2. Strategic sectors for Yucatán's industrialisation and growth*



## Ten goals to transform Yucatán by 2050

**The ten goals of Plan Yucatán translate the state's long-term vision into concrete, measurable, and action-oriented outcomes.** The goals address the state's challenges and opportunities and are aligned with the priorities and targets of Plan México, while incorporating the objectives set out in the Maya Renaissance State Development Plan 2024–2030 and the sectoral medium-term state plans, ensuring coherence between the long-term industrial vision and the existing planning instruments.

*Figure ES-3. Ten goals to transform Yucatán by 2050*

### I. Human talent

1. Eliminate the wage gap with the rest of the country.
2. Create an additional 40,000 jobs in medium- and high-technology manufacturing subsectors.

### II. Strategic and sustainable industrial infrastructure

3. Triple the share of electricity generated from renewable sources.
4. Halve greenhouse gas emissions.

### III. Innovation and technology for development

5. Triple the number of patents registered annually.
6. Position Yucatán among the five federal entities with the highest proportion of economic units using digital technologies.

### IV. Supply chain development and regional integration

7. Position Yucatán among the ten federal entities with the highest level of economic complexity in the country.
8. Increase the share of verifiable local sourcing in the state's strategic manufacturing demand to 50%.

### V. Global engagement and investment attraction

9. Eliminate the productivity gap with the rest of the country, particularly in manufacturing and high-value-added services.
10. Increase the share of medium- and high-technology goods and services exports to 50% of the state's total exports.

## An invitation to invest in the future

**Plan Yucatán is more than a public policy document.** It is a shared vision for building an economy capable of competing in the industries of the future. It is a commitment to generating greater value added, driving innovation, developing world-class talent, and consolidating modern infrastructure that connects Yucatán with the world's leading markets.

**The ambition is clear: to position Yucatán among the five most competitive states in México; to eliminate the productivity gap with the rest of the country; to create tens of thousands of jobs in industries of greater technological sophistication; to strengthen innovation; and to build a sustainable and inclusive economy.**

**For businesses, investors, and strategic partners, the message is clear: Yucatán offers stability, a strategic location, talent, infrastructure, scientific capabilities, and a long-term vision supported by a comprehensive industrial policy.** For México, it represents an opportunity to build a new competitive and sustainable industrial development hub. For its people, it offers the opportunity to transform economic growth into shared prosperity.

**Yucatán's industrial renaissance has already begun. The invitation is to build it together.**

# Introduction

## Yucatán's industrial renaissance

The world is entering a new era of economic and industrial competition, and México has responded through Plan México, once again placing industrial policy at the centre of national economic development. Today, Yucatán is experiencing a similar moment at state level: the expansion of the Port of Progreso, the Maya Train freight service, and the *Polos de Desarrollo para el Bienestar* industrial hubs are transforming the conditions for industrial development.

However, this is not the first time Yucatán has faced a period of productive transformation. During the late nineteenth and early twentieth centuries, the state established itself as one of México's principal economic engines through the henequen (*sisal*) agro-industry, whose integration into international markets made Yucatán an economy deeply connected to global trade.

Following the decline of this activity, the state pursued new development strategies based on trade and services, as well as manufacturing, particularly in the food and beverage industries and apparel production. While these processes generated employment and integrated the state into new productive chains, they also left unresolved the challenge of advancing towards activities characterised by greater technological content, innovation, and value added.

Today, Yucatán once again stands before an opportunity for transformation. Unlike previous periods, the objective is to build the capabilities required to compete in knowledge-intensive, technology-driven, and sustainable industries. In this context, the Maya Renaissance can also be understood as an industrial renaissance: a new stage of economic development that draws on the state's entrepreneurial and export-oriented tradition to project it towards the industries of the future.

Yet opportunities alone do not guarantee development. Seizing them requires a shared vision, coordination across institutions, and an evidence-based strategy capable of guiding public and private decision-making towards common objectives. The challenges are significant. Although Yucatán is among the most dynamic economies in the country, productivity, wage, and innovation gaps continue to constrain the state's ability to generate higher levels of prosperity. Closing the productivity gap relative to the national average would significantly increase the wealth generated within the state, with an estimated potential of over USD700 million in additional economic output annually, resources that could translate into higher incomes, better jobs, increased investment, and improved living standards for Yucatán's families.

The Industrial Policy of the State of Yucatán 2025–2050 stems from this conviction. Plan Yucatán provides a roadmap for strengthening the capabilities that will determine the state's competitiveness in the coming decades, structured around five strategic pillars: Human talent, Strategic and sustainable industrial infrastructure, Innovation and technology for development, Supply chain development and regional integration, and Global engagement and investment attraction.

This strategy incorporates a cross-cutting vision of shared prosperity to ensure that economic growth translates into opportunity, social mobility, and wellbeing for all regions and population groups. In the spirit of the Maya Renaissance, this policy views industrial development as a means of building a more prosperous, competitive, and inclusive state. The decisions taken today will shape Yucatán's productive structure for decades to come. This document is an invitation to build that future together, guided by a long-term vision, evidence-based decision-making, and a shared commitment to transforming Yucatán's historic opportunity into prosperity for present and future generations.

# 1. Why an industrial policy for Yucatán?

## 1.1 A new context for industrial development

The international economic environment has undergone profound transformations in recent decades. Slowing global growth, disruptions arising from the pandemic, digital transformation, the green transition, geopolitical tensions, and the resulting reconfiguration of value chains have highlighted the limitations of a model based on cost efficiency and highly concentrated global supply chains alone.

These transformations create significant development opportunities, but they also increase the risk of falling behind for territories that fail to develop, in a timely way, the capabilities required to participate in the industries of the future (UNIDO, 2025). In response, many countries have re-embraced industrial policy as a tool for strengthening productive capabilities, reducing strategic dependencies, enhancing economic resilience, and accelerating the transition towards new technologies (UNIDO, 2025; ECLAC, 2026).

International experience demonstrates that economic development does not occur by chance. Countries that have successfully transformed their productive structures in a sustained way have done so through long-term industrial strategies supported by strong institutions, investment in infrastructure, human talent development, innovation, and effective mechanisms of collaboration between the public and private sectors (Chang et al., 2013; UNIDO, 2020).

## 1.2 México and the industrial policy renewal

North America has emerged as one of the strategic regions for the reconfiguration of value chains. Trade tensions, reshoring, nearshoring, and friendshoring processes, together with the pursuit of greater supply chain resilience, have strengthened regional integration. But geographical advantages alone are not enough. Growing competition among countries and regions requires the development of productive, technological, and innovation capabilities that enable territories to capture a greater share of the value generated by these transformations (UNIDO, 2025; ECLAC, 2026).

This vision is reflected in Plan México, which sets out a strategy aimed at strengthening strategic sectors, increasing regional integration, developing national suppliers, and capitalising on the opportunities arising from the relocation of investment. This reinforces the importance of states developing their own industrial capabilities and strategies in coordination with national policy.

However, the benefits of these transformations are not distributed automatically across territories. A small number of states account for the majority of the country's manufacturing exports, foreign direct investment, and technological capabilities. This makes it essential for entities such as Yucatán to develop a long-term industrial vision that enables them to integrate into emerging regional dynamics, strengthen sectors with specialisation potential, develop innovation ecosystems, and build the capabilities needed to increase their participation in national and international value chains.

In a context defined by profound technological, geopolitical, and environmental transformations, the absence of an industrial strategy is no longer a neutral position but a choice that can deepen productive and technological lag. For Yucatán, this means designing a long-term strategy capable of transforming its productive structure, strengthening its business base, generating learning and innovation processes, and increasing its participation in higher-value-added activities within regional and global value chains.

## 1.3 The opportunity for Yucatán

Yucatán has particularly favourable conditions to take advantage of this new international context. The expansion of the Port of Progreso, the Maya Train freight service, the development of the *Polos de Desarrollo para el Bienestar* industrial hubs, investments in logistics and energy infrastructure, and growing interest from national and international companies are redefining the state's competitive advantages.

However, the benefits of these transformations are not distributed automatically across territories. International experience demonstrates that the regions that are most successful at attracting higher-value-added investment are those with a clear strategy, capable institutions, and a sustained commitment to developing productive capabilities and innovation. For Yucatán, this means strengthening its business base, developing talent, promoting innovation, consolidating strategic sectors, and facilitating the integration of local companies into national and international value chains.

In a context characterised by profound technological, economic, and environmental transformations, the absence of an industrial strategy is not a neutral position. On the contrary, it can result in missed opportunities for investment, employment, and productive development. This policy, therefore, seeks to provide the state with a long-term vision capable of transforming today's opportunities into sustained prosperity.

## 1.4 Legal foundation and strategic alignment

The state legal framework explicitly establishes the government's responsibility to promote economic development through comprehensive and permanent public policies. Article 87 of the Political Constitution of the State of Yucatán mandates the State to design instruments that foster economic development and to organise a comprehensive development planning system grounded in a long-term vision, environmental sustainability, and territorial equity.

The Economic Development and Employment Promotion Law reinforces this mandate by providing for the creation of a strategic instrument that includes an economic diagnosis, regional analysis, identification of productive specialisations, integration of value chains, and the definition of priority sectors. The law also establishes the need for monitoring and evaluation mechanisms, underscoring the continuous and structured nature of industrial policy.

In addition, the regulations governing special economic zones establish that the State Government will participate in the design and implementation of a development programme aimed at setting out public policies and actions based on a comprehensive and long-term approach. Furthermore, the Public Administration Code assigns responsibility for the design and implementation of industrial development policies to the Ministry of Economy and Labour. Taken together, this legal framework not only empowers the State to pursue an industrial strategy but also requires it to do so as an essential component of its public responsibilities.

This policy is also aligned with national and state objectives aimed at achieving balanced and territorially inclusive economic development. The National Development Plan 2025–2030 emphasises the need to reduce regional disparities through strengthening productive capabilities, developing supply chains, creating *Polos de Desarrollo para el Bienestar* industrial hubs, developing strategic infrastructure, and generating decent employment.

Similarly, the Maya Renaissance State Development Plan 2024–2030, through its strategic guideline "An economy with shared prosperity and the revitalisation of the countryside", seeks to strengthen economic development by promoting entrepreneurship and socially oriented businesses, encouraging investment and productivity, and supporting the development of strategic productive sectors.

# 2.

# Yucatán 2050: the future we are building today

## 2.1 Vision 2050 of Plan Yucatán

The Industrial Policy of the State of Yucatán 2025–2050 envisions consolidating the state as a national and international benchmark for sustainable, competitive, and inclusive industrial development, where industry is the engine of economic growth, quality employment, and social wellbeing. By 2050, Yucatán will be one of México's most competitive and sustainable states, recognised for its leadership in innovation, the strength of its high-value-added industries, its specialised talent, and its capacity to generate shared prosperity.

Under this vision, Yucatán is projected to become a dynamic industrial territory and a logistics and investment hub, capable of attracting high-value-added productive investment within a regulatory environment that provides certainty, supported by efficient and state-of-the-art industrial infrastructure, innovative businesses integrated into national and international value chains, and academic and research institutions working closely with industry. Industrial development will build upon the economic strengths of each region to promote balanced, inclusive, and environmentally sustainable growth.

## 2.2 Ten goals to transform Yucatán by 2050

The ten goals of Plan Yucatán translate the state's long-term vision into concrete, measurable, and action-oriented outcomes. Their definition is based on the principal challenges identified through the diagnostic assessment. They are also aligned with the priorities and targets of Plan México and incorporate the objectives established in the Maya Renaissance State Development Plan 2024–2030 and the sectoral medium-term plans, ensuring consistency between the long-term industrial vision and the existing planning instruments.

*Figure 1. Ten goals to transform Yucatán by 2050*

### I. Human talent

#### 1. Eliminate the wage gap with the rest of the country.

**Current situation:** Relative wage compared with the national average: 83%, ranking 25th.

**Reference period:** 2025.

**Indicator:** State annual average daily wage of workers affiliated with the Mexican Social Security Institute (IMSS) relative to the national average

**Source:** Ministry of Labour and Social Welfare. Daily wage of workers affiliated with the IMSS by federal entity.

#### 2. Create an additional 40,000 jobs in medium- and high-technology manufacturing subsectors.

**Current situation:** 9,971 people employed in medium- and high-technology manufacturing subsectors.

**Reference period:** 2023.

**Indicator:** Employment in subsectors such as the chemical industry; machinery and equipment manufacturing; the manufacture of computer, communications, measuring, and other electronic equipment, components, and accessories; the manufacture of electrical accessories, appliances, and power generation equipment; and the manufacture of transport equipment.

**Source:** INEGI. Economic Census.

## II. Strategic and sustainable industrial infrastructure

### 3. Triple the share of electricity generated from renewable sources.

**Current situation:** 15% of electricity generated in the state.

**Reference period:** 2025.

**Indicator:** Percentage share of electricity generated from renewable sources as a proportion of total state generation.

**Source:** Yucatán Energy Agency. Medium-Term Programme 2025–2030: Energy Wellbeing and Emissions Mitigation Programme.

---

### 4. Halve greenhouse gas emissions.

**Current situation:** 4.40 $tCO_2e$ per capita.

**Reference period:** 2022.

**Indicator:** Tonnes of carbon dioxide equivalent emissions per capita.

**Source:** Yucatán Energy Agency. Medium-Term Programme 2025–2030: Energy Wellbeing and Emissions Mitigation Programme.

## III. Innovation and technology for development

### 5. Triple the number of patents registered annually.

**Current situation:** In 2024 the number of patents registered in the state declined by 38.5%, placing Yucatán 22nd nationally, with a rate of 0.6 patents per 100,000 members of the economically active population.

**Reference period:** 2025.

**Indicator:** Patents per 100,000 members of the economically active population.

**Source:** Mexican Institute for Competitiveness (IMCO). State Competitiveness Index.

---

### 6. Position Yucatán among the five federal entities with the highest proportion of economic units using digital technologies.

**Current situation:** In Yucatán 26.89% of economic units use at least one digital technology in their operations, placing the state 17th nationally.

**Reference period:** 2023.

**Indicator:** Ranking and percentage of economic units using information and communication digital technologies.

**Source:** NEGI. Economic Census.

# IV. Supply chain development and regional integration

## 7. Position Yucatán among the ten federal entities with the highest level of economic complexity in the country.

**Current situation:** Economic complexity score of 0.31, ranking 16th nationally.

**Reference period:** 2024 for the Economic Complexity Index (ECI); 2023 for value-added and productivity census indicators.

**Indicator:** Yucatán's position in the Economic Complexity Index; number of strategic industrial branches or classes with gross census value added per economic unit or per employee above the state average; share of medium- and high-technology sectors in industrial production.

**Source:** DATA México, Ministry of Economy; INEGI, Economic Census.

---

## 8. Increase the share of verifiable local sourcing in the state's strategic manufacturing demand to 50%.

**Current situation:** 108 large-scale economic units, out of 10,354 in Yucatán, reported productive collaboration agreements.

**Reference period:** 2023.

**Indicator:** Percentage of strategic manufacturing intermediate consumption supplied by local providers; value of local purchases by anchor companies; number of certified local suppliers; participation of micro, small, and medium enterprises (MSMEs) in supplier development programmes.

**Source:** INEGI, Economic Census.

# V. Global engagement and investment attraction

## 9. Eliminate the productivity gap with the rest of the country, particularly in manufacturing and high-value-added services.

**Current situation:** Relative productivity of the economy: 55%; manufacturing sector: 45%; professional, scientific, and technical services: 78%.

**Reference period:** 2023.

**Indicator:** Labour productivity relative to the national average (value added per employee).

**Source:** INEGI. Economic Census.

---

## 10. Increase the share of medium- and high-technology goods and services exports to 50% of the state's total exports.

**Current situation:** 34.7% of exports.

**Reference period:** 2025.

**Indicator:** Percentage of total export value represented by subsectors such as the chemical industry; machinery and equipment manufacturing; manufacture of computer, communications, measuring, and other electronic equipment, components, and accessories; manufacture of electrical accessories, appliances, and power generation equipment; and manufacture of transport equipment.

**Source:** INEGI. Annual exports by SCIAN activity subsector in Yucatán.

## 2.3 How was Plan Yucatán developed?

The preparation of Plan Yucatán: Industrial Policy of the State of Yucatán 2025–2050 was based on a comprehensive methodology that combined document review, statistical analysis, and participatory processes. In the initial stage, the principal planning documents were reviewed at both national and state levels, incorporating the findings generated through the processes carried out under those planning instruments. These documents included Plan México, the State Development Plan, and the medium-term state plans, with the aim of ensuring that the vision and objectives of the policy were aligned with current development priorities and the aspirations of the people of Yucatán.

This planning exercise was not limited to a documentary review; it was built through an extensive collaborative process that included the working groups convened for the preparation of the State Development Plan, as well as strategic meetings and thematic working groups addressing a range of issues that are now reflected in the pillars of the policy. These efforts were designed to deepen understanding of the needs, expectations, and priorities of the sectors and stakeholders involved in each area.

At the same time, a statistical analysis of economic, social, environmental, and territorial indicators was conducted, taking into account trends at state, national, and international levels to identify challenges, opportunities, and long-term drivers of transformation. In addition to the consultation and participation mechanisms undertaken, sectoral dialogue forums will be convened to support the preparation of strategic sector plans. These forums will facilitate coordination among the public sector, the private sector, academia, and wider society, enabling the development of shared roadmaps to guide sustainability and strengthen the competitive capabilities of each sector.

# 3. Challenges & opportunities for Yucatán's industrial development

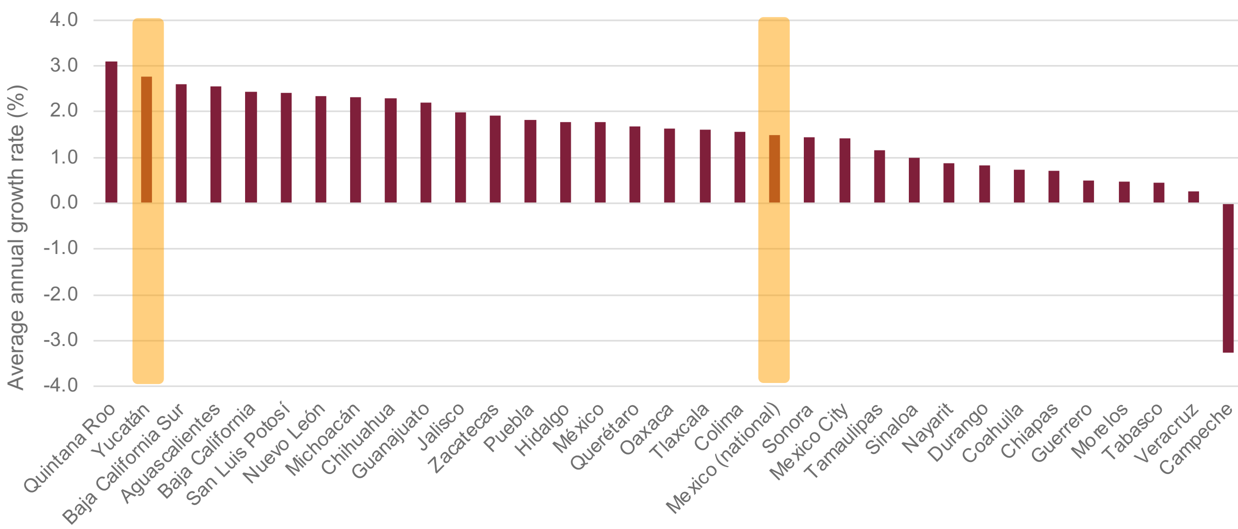
The economic dynamism that has characterised Yucatán over the past decade has established the state as one of the fastest-growing economies in México. This performance is underpinned by a combination of strengths that provide favourable conditions for advancing a new phase of industrialisation, including an export-oriented manufacturing sector, a strong base of educational and research institutions, the availability of human talent, and logistics and energy infrastructure that is being expanded and modernised.

## Yucatán stands out among the fastest-growing economies in the country.

Between 2014 and 2024, the state's GDP grew at an average annual rate of 2.8%, the second highest in México after Quintana Roo (3.1%). This performance exceeds the national average of 1.5% and surpasses that of highly industrialised states such as Baja California (2.4%), Nuevo León (2.3%), Jalisco (2.0%), and Querétaro (1.7%) (Figure 2). The pace of growth recorded is comparable to that of economies such as New Zealand and South Korea over the same period (World Bank, 2026).

*Figure 2. Yucatán is the second-most dynamic economy in México*

***Average annual growth rate of gross domestic product at 2018 prices, 2014–2024***




*Source: Ministry of Economy and Labour of the State of Yucatán, based on data from INEGI (2026). System of National Accounts of México. Gross Domestic Product by Federal Entity, base year 2018.*

This growth has been driven primarily by the manufacturing sector, wholesale and retail trade activities, and construction. Together, these sectors accounted for more than half of the growth of Yucatán's economy between 2014 and 2024 (INEGI, 2026). The state's security and legal certainty have also contributed to this growth. Yucatán ranks first as the most peaceful state in México according to the Mexico Peace Index 2026 (IEP, 2026) and second nationally in business security according to the 2024 Business Security Survey conducted by the American Chamber of Commerce of Mexico.

## Economic growth has not translated into shared prosperity.

Yucatán ranks among the ten states with the lowest wages for workers affiliated with the Mexican Social Security Institute in 2025 (STPS, 2026). The state also records a high rate of informality (59.3%) (INEGI, 2026b), reflecting the lower value added and lower productivity of economic activities in Yucatán.

The state's economic activities generate less wealth per worker than those of many other regions in the country. This gap is particularly evident in manufacturing and among larger firms, where output per worker remains less than half the national average. By contrast, professional, scientific, and technical services display a smaller gap, suggesting a stronger comparative performance in these activities (Table 1). This gap exists because a significant proportion of employment and business activity in Yucatán is concentrated in sectors and productive segments with lower technological intensity. As a result, the economic value generated per person employed is lower than in regions where technology-intensive activities predominate.

*Table 1. Productivity remains one of Yucatán's principal challenges*

| Productivity Gaps in Yucatán | Labor productivity relative to the national average | National ranking |
|---|---|---|
| Total economy | 55% | 28 |
| Manufacturing industries | 45% | 28 |
| Professional, scientific, and technical services | 78% | 16 |
| Microenterprises | 75% | 22 |
| Small businesses | 90% | 20 |
| Medium-sized businesses | 75% | 27 |
| Large businesses | 42% | 28 |

*Note: Labour productivity is measured as the ratio of gross census value added to total employment.*

*Source: Ministry of Economy and Labour of the State of Yucatán, based on data from INEGI (2024). Economic Census 2024: Final Results.*

## 3.1 Productive capabilities

### Yucatán has established itself as one of the leading productive and industrial hubs in south-eastern México.

The state's economic structure combines a domestic market driven primarily by trade with a growing export orientation supported by manufacturing and significant investment attraction in service activities (Table 2). Taken together, wholesale and retail trade generate close to one-third of both state value added and employment in Yucatán. Manufacturing, meanwhile, is the third-largest contributor to the state economy, accounting for 11.4% of value added in 2024. In addition, Yucatán leads manufacturing activity in south-eastern México, generating around 40% of the region's manufacturing value added (INEGI, 2026a).

## Manufacturing is a strategic sector for both productivity and labour market inclusion.

Although manufacturing in Yucatán has productivity levels below the national average, the sector has the potential to become a key driver of the state's economic growth. International evidence shows that strengthening manufacturing capabilities has been a critical factor in the development of economies such as Germany, the United States, Japan, South Korea, and, more recently, China. In México this relationship is also evident in the country's most industrialised states, where manufacturing has made a significant contribution to economic growth, employment generation, and integration into global value chains.

Manufacturing industries account for 22% of employment in Yucatán, making them the state's second-largest employer in 2023, after retail trade (23.5%). They also display a relatively high level of female participation (46.3%), exceeding that seen in sectors such as construction (13%) and wholesale trade (30.2%) (INEGI, 2024). This makes manufacturing a strategic sector for both productivity and labour market inclusion. Strengthening the manufacturing sector would also help to reduce informal employment. The state's productive capabilities reflect a combination of well-established strengths in traditional activities and growing specialisation in segments with greater scaling potential.

## The state's productive capacities reflect a combination of strengths in traditional industries and a growing specialisation in high-value sectors.

Within Yucatán's manufacturing landscape, several traditional activities continue to play a fundamental role in generating value added, employment, and exports; food manufacturing is a clear example of this strength. In addition to contributing 7.0% of state value added and accounting for 5.8% of employment, it ranks as the state's third-largest export sector (INEGI, 2024; INEGI, 2025c). Similarly, beverage and tobacco manufacturing, and apparel manufacturing, continue to maintain an important presence within the state economy.

*Table 2. The engines of Yucatán's economy*

| Rank | Value added, 2024 | Employment, 2023 | | | Exports, 2025 | Foreign direct investment, Q1 2018 - Q4 2025 |
|---|---|---|---|---|---|---|
| | | Total | Women | Men | | |
| 1 | Retail trade 14.8% | Retail trade 23.5% | 51.6% | 48.4% | Transportation equipment manufacturing 34.1% | Accommodation and food and beverage preparation services 24.9% |
| 2 | Wholesale trade 14.0% | Manufacturing industries 22.0% | 46.3% | 53.7% | Other manufacturing industries 20.6% | Financial and insurance services 20.1% |
| 3 | Manufacturing industries 11.4% | Accommodation and food and beverage preparation services 13.8% | 53.3% | 46.7% | Food manufacturing 17.7% | Manufacturing industries 14.8% |
| 4 | Construction 10.2% | Wholesale trade 6.0% | 30.2% | 69.8% | Apparel manufacturing 11.6% | Retail trade 6.8% |
| 5 | Real estate and rental services 9.6% | Other services 5.8% | 36.2% | 63.8% | Beverage and tobacco manufacturing 3.2% | Transportation, postal services and warehousing 6.7% |

*Source: Ministry of Economy and Labour of the State of Yucatán, based on data from INEGI (2026). Gross Domestic Product by Federal Entity (PIBE), base year 2018; INEGI (2025c). Annual exports by SCIAN activity subsector in Yucatán; INEGI (2024). Economic Census 2024: Final Results; Ministry of Economy (2025). Foreign Direct Investment in México: cumulative quarterly flows since the beginning of each year, by federal entity and economic activity.*

## Yucatán's manufacturing strength is also reflected in its international integration.

Manufactured goods account for more than 90% of the state's exports and constitute the principal link between Yucatán's economy and the global markets. This export specialisation has been accompanied by increasing diversification into activities with greater technological complexity. Particularly notable is the manufacture of transport equipment, whose share of exports has grown rapidly in recent years to become the state's leading export sector, accounting for 34.1% of state exports in 2025 (INEGI, 2025c).


## Advancing labour market inclusion remains a priority for industrial development.

While manufacturing offers an opportunity to strengthen the labour market inclusion of women, barriers that limit their participation and retention in employment persist. In the fourth quarter of 2025, only 51.4% of women in Yucatán participated in the labour market, a proportion higher than the national average of 45.7% but significantly lower than the participation rate for men, which stood at 78.5% (INEGI, 2026b).

The lower labour market participation of women is driven, among other factors, by the unequal distribution of domestic and care responsibilities, as well as the persistence of organisational practices and workplace cultures that are insufficiently inclusive. In Yucatán, women devote an average of 46 hours per week to unpaid domestic work, care work, and voluntary activities, almost twice the time spent by men. Although this gap is slightly smaller than the national average (2.2 times), it continues to affect women's ability to enter, remain in, and progress within the labour market (INEGI, 2025b). Furthermore, 21% of employed women in Yucatán reported having experienced some form of workplace violence in 2021, placing the state ninth nationally in terms of incidence rates (INEGI, 2022).

## There are also opportunities to improve the energy efficiency of economic activities.

Yucatán's energy intensity, understood as the amount of energy required to generate one unit of output, is slightly above the national average. This level also exceeds that of states with more developed industrial structures, such as Jalisco, the State of México, and México City, suggesting there is scope to improve the energy efficiency of the state economy (Government of Mexico, 2022; INEGI, 2026a).

With regard to greenhouse gas (GHG) emissions, the state is estimated to have recorded per capita emissions of 4.40 tonnes of carbon dioxide equivalent ($tCO_2e$) per inhabitant in 2023. This figure is below the national average, which reached 5.57 $tCO_2e$ per inhabitant in 2022. The principal source of emissions in the state in 2023 was electricity generation, accounting for 28.5% of total GHG emissions. This was followed by road transport, associated with the combustion of fossil fuels, which represented 26.5%, and cattle farming, which contributed 8.5% of total emissions (Ministry of Sustainable Development, 2024).

## 3.2 Innovation capabilities

### Yucatán has a strong institutional foundation for knowledge generation and the specialised development of human talent.

The Yucatán Research, Innovation and Technological Development System (SIIDETEY) plays a strategic role as a coordinating body linking the higher education institutions and the public and private research centres that form part of the system. Currently, SIIDETEY comprises 17 active institutions. In addition, Yucatán is home to 130 higher education institutions and 425 laboratories (SECIHTI, 2025). Thanks to this extensive scientific and technological infrastructure, Yucatán ranks third nationally in terms of the number of research centres and seventh for the number of scientific and technological laboratories (SECIHTI, 2025).

### This is complemented by a significant scientific community that contributes to research and the generation of specialised knowledge.

According to data from the National System of Researchers (SNII), Yucatán had 906 accredited researchers in 2025, placing the state 15th among México's federal entities by number of researchers and fifth in terms of researchers per 100,000 inhabitants (SECIHTI, 2026; 2025). The distribution of SNII researchers across scientific fields in Yucatán reveals a strong concentration in areas linked to natural sciences and strategic productive sectors (SECIHTI, 2026).

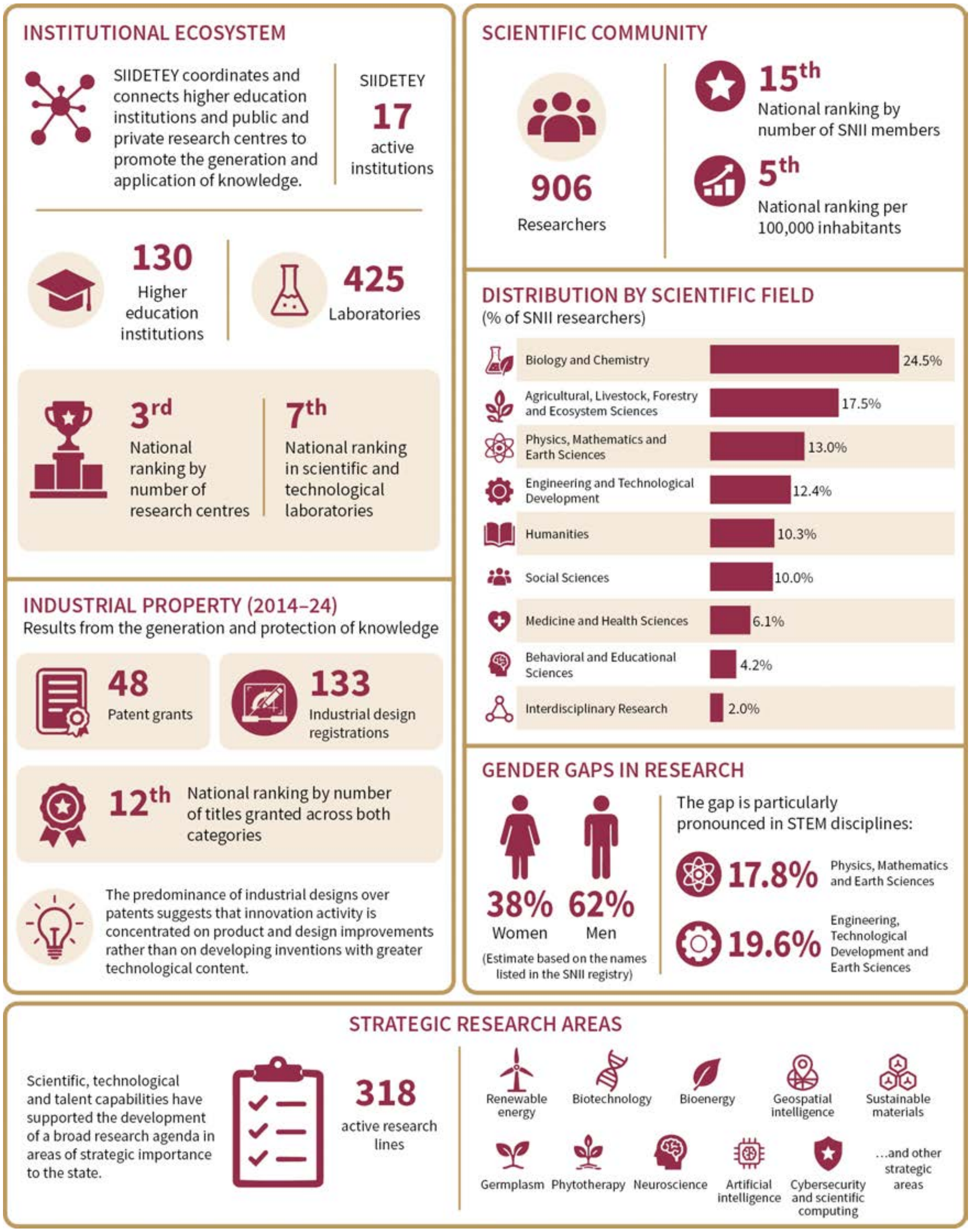
### Yucatán has developed capabilities for the generation and protection of innovation.

Between 2014 and 2024, a total of 48 patents and 133 industrial design registrations were granted to Mexican residents in Yucatán, placing the state twelfth nationally in terms of the total number of titles granted across both categories (IMPI, 2026).

### Gender gaps persist in participation in research activities, particularly in STEM disciplines.

From a gender perspective, based on the names of researchers included in the SNII register, approximately 38% are women and 62% are men, highlighting a participation gap that is particularly pronounced in certain STEM (science, technology, engineering, and mathematics) fields. Female representation is especially low in physical–mathematical sciences and earth sciences, where women account for only 17.8% of researchers, and in engineering and technological development, where they represent 19.6% (SECIHTI, 2026) (Figure 3).

*Figure 3. Yucatán has a strong innovation ecosystem*




*Source: Ministry of Economy and Labour of the State of Yucatán, based on data from IMPI (2026). Patents and registrations granted to Mexican residents by federal entity; SECIHTI (2026). Register of researchers with current accreditation in the National System of Researchers (SNII); SECIHTI (2025). Medium-Term Programme 2025–2030: Science, technology and innovation, diagnostic section. Government of the State of Yucatán.*

## The state's scientific, technological, and talent capabilities have supported the development of a broad research agenda in areas of strategic importance to Yucatán.

According to the Medium-Term Programme (PMP) 2025–2030, SIIDETEY is supporting 318 active research lines, including renewable energy, biotechnology, bioenergy, geointelligence, sustainable materials, germplasm, phytotherapy, neuroscience, artificial intelligence, cybersecurity, and scientific computing, among others. Box 1 presents some recent examples of innovation.

### *Box 1. Innovation with a Yucatán hallmark*

- ***KanAi Visión.*** *An artificial intelligence project applied to the agri-food sector through solutions for pig farms, integrating video surveillance and biometric technologies to optimise production management, prevent health risks, and improve animal welfare.*

- ***Tilapia Gen.*** *A biotechnology initiative serving the agri-food sector, particularly the aquaculture industry, through the genetic improvement of tilapia to increase growth rates, resilience, and productive performance.*

- ***Furbinary.*** *A circular economy project offering solutions to a range of productive sectors through the collection, repair, and commercialisation of electronic equipment, contributing to the reduction of technological waste and the environmental footprint.*

- ***Sargasea.*** *A biotechnology project serving the agri-food sector through a prototype developed by the Yucatán Scientific Research Centre (CICY) for the comprehensive use of sargassum. Applications include the production of edible mushrooms, biofertilisers, biogas, new materials, and predictive models for monitoring sargassum, among other uses with economic, social, and environmental benefits.*

- ***Aquox.*** *A biotechnology project supporting the clean energy and manufacturing sectors through technology developed by CICY for wastewater treatment and energy generation. The system is capable of removing up to 95% of contaminants present in water through a self-sustaining process that generates electricity during operation; produces no GHG emissions; and complies with applicable regulations (CICY, 2019; 2024).*

*Source: CICY (2019). CICY proposes a comprehensive strategy for the use of sargassum; CICY (2024). CICY transfers AQUOX® technology to the industrial sector.*

## 3.3 Human talent

### Yucatán has a broad upper-secondary and higher education offering.

Yucatán is home to 463 upper-secondary education institutions and 209 higher education institutions (SEGEY, 2026b). Mérida accounts for 27% of upper-secondary institutions and 76% of higher education institutions (SEGEY, 2026a), reflecting its role as the state's principal centre for academic and specialised training. This concentration supports the availability of talent and strengthens links between educational institutions, research centres, and businesses established within the metropolitan area. But it also highlights territorial disparities in access to educational opportunities, particularly at higher levels of education.

### Developing human talent is one of Yucatán's principal strengths for advancing productive transformation and innovation.

During the 2024/25 academic year, 18,701 students graduated from higher education programmes, of whom 54.9% were women, 3.3% were speakers of Indigenous languages, and 1.7% were persons with disabilities. Three out of every four graduates completed university degree or technological programmes, primarily in business and administration (24.5%), social sciences and law (18.7%), health sciences (18.0%), engineering, manufacturing and construction (15.4%), and information and communication technologies (3.6%) (ANUIES, 2025a).[1]

STEM programmes accounted for 28.3% of all higher education graduates. The gap was more pronounced among women, with only 19.4% of female graduates in the state completing STEM programmes, compared with 39.1% of male graduates. Women accounted for 37.7% of all STEM graduates; persons with disabilities represented 2.5% of STEM graduates; and speakers of Indigenous languages accounted for 5.0% (Figure 4).

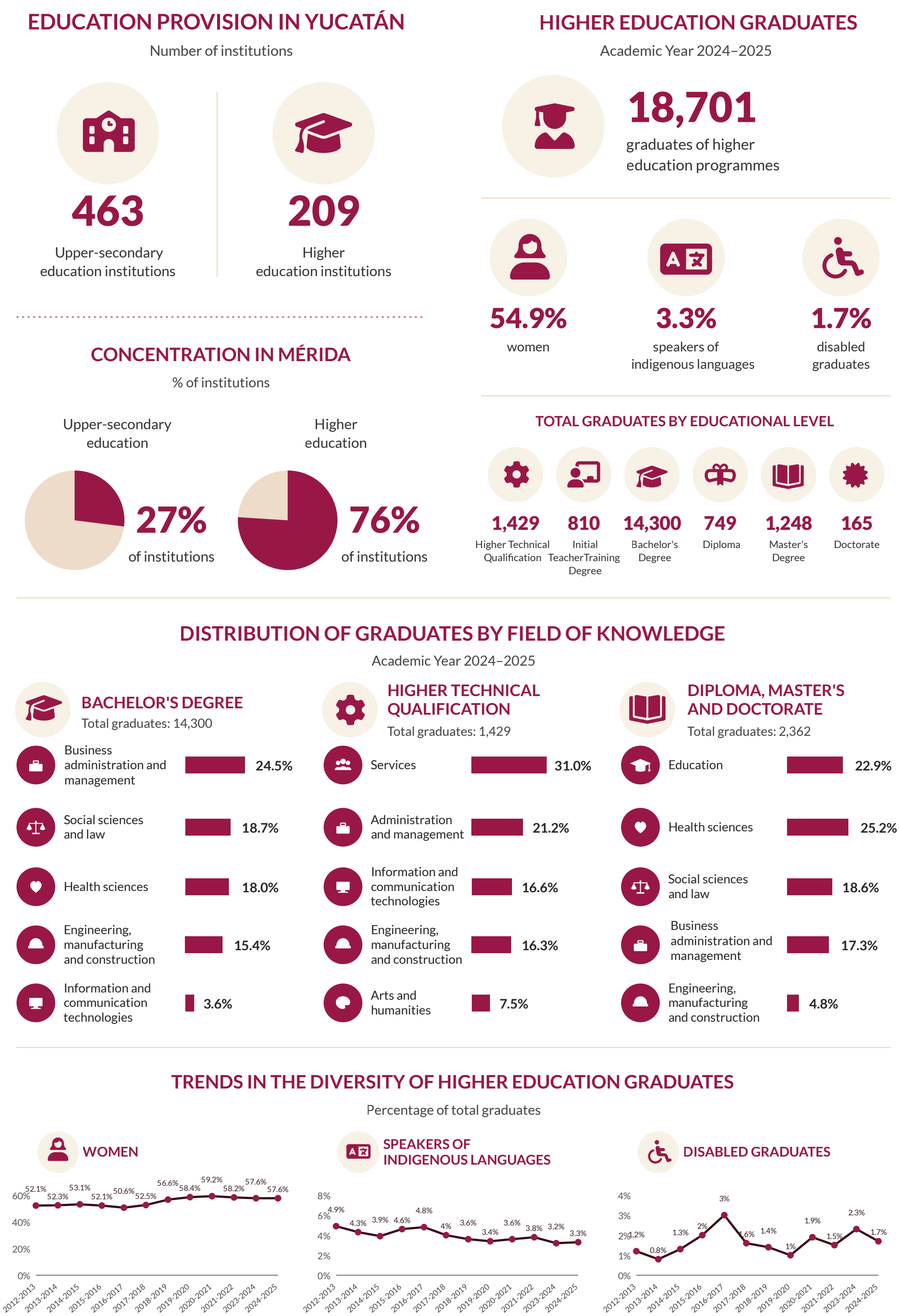
Over the last decade, women's participation in higher education has increased, particularly in STEM fields. But progress in the participation of persons with disabilities and Indigenous language speakers has been less consistent, with declines observed between 2020 and 2022, and again during 2023–24 (ANUIES, 2026b). This highlights the importance of strengthening policies that expand access, retention, and the development of diverse talent in areas that are strategic for the state's competitiveness and innovation.

### Yucatán has a demographic dividend that can accelerate industrial transformation.

The population aged 12 to 29 exceeds 740,000 people and represents approximately 29.8% of the state's population. But there are opportunities to further support the development of their capabilities and their integration into employment and entrepreneurship. Only 41.2% of young people in Yucatán access higher education, while 58.2% are employed in informal work arrangements (Ministry of Youth, 2025).

1 The ANUIES database includes public and private higher education institutions affiliated with the association and therefore does not represent the full universe of higher education institutions operating in the country.

*Figure 4. Human talent is one of Yucatán's principal strengths*




*Source: Ministry of Economy and Labour of the State of Yucatán, based on data from the National Association of Universities and Higher Education Institutions (2025). Statistical Yearbook of Higher Education Enrolment, Academic Year 2024–2025; Ministry of Education of Yucatán (2026). Statistical Report.*

## 3.4 Industrial infrastructure

### Yucatán's geographical location is one of its principal competitive advantages for industrial development.

Situated between the Gulf of Mexico and the Caribbean, the state enjoys privileged access to national and international markets, particularly the eastern and southern United States, Central America, South America, and Europe. This position facilitates its integration into global trade routes and makes it a strategic location for the movement of goods and the attraction of investment. This territorial advantage is reinforced by a network of road, port, airport, rail, and digital infrastructure that provides favourable conditions for industrial activity.

### Industrial growth and the arrival of new investment have increased the importance of connectivity and logistics as key factors in territorial competitiveness.

One of the state's principal logistics assets is the Port of Progreso. Located approximately 36 kilometres from Mérida, it is Yucatán's main maritime hub and one of the most important ports in south-eastern México. Its location supports the peninsula's commercial integration with national and international markets and strengthens the state's participation in international trade.

At national level, the port maintains strategic connections with Gulf of Mexico ports such as Altamira and Coatzacoalcos, facilitating the movement of goods with other regions of the country. Internationally, Progreso operates maritime routes with some of the principal markets on the east coast of North America, including Houston, New Orleans, Jacksonville, and New York in the United States, as well as Montreal and Saint John in Canada. These connections enable competitive transit times and strengthen the state's export and import capabilities (ASIPONA, 2021).

**Taken together, the state's airport infrastructure constitutes a strategic platform for strengthening investment attraction and consolidating a multimodal transport system integrated with the Port of Progreso, industrial corridors, and regional projects such as the Maya Train freight service.**

Yucatán is served by Manuel Crescencio Rejón International Airport in Mérida, the state's principal air transport hub and one of the most dynamic airports in south-eastern México. Its location, less than forty kilometres from the Port of Progreso, supports the multimodal integration of logistics operations. The airport offers an extensive network of domestic and international connections linking the state to México's principal economic centres, as well as destinations in the United States, Canada, Central America, and the Caribbean. In addition to its importance for passenger transport, it plays a strategic role in air freight operations. The presence of global logistics companies, combined with installed capacity for specialised cargo handling, enables the movement of more than two thousand tonnes of freight per month and supports high-value-added industrial sectors (Federal Civil Aviation Agency, 2022).

## In the rail sector Yucatán is undergoing a period of transformation driven by development of the Maya Train.

After more than two decades without regular rail services, the state was reconnected to the national railway system with the launch of passenger services in 2023. This network connects Yucatán with Campeche, Quintana Roo, Chiapas, and Tabasco, strengthening regional integration across south-eastern México. The addition of the freight component will expand the region's logistics capabilities by providing an efficient alternative for the transport of goods. The system will leverage next-generation infrastructure designed for the combined operation of passenger and freight services, strengthening Yucatán's integration with regional logistics corridors and contributing to the competitiveness of the industrial sector.

## Strengthening the energy sector has become a strategic component of Yucatán's industrial competitiveness and energy transition.

Yucatán has 33 electrical substations and a transmission network spanning 1,499.2 km, as well as strategic natural gas infrastructure such as the Mayakán pipeline, whose expansion through the Cuxtal II project will strengthen the regional energy supply. In addition, the Federal Electricity Commission is developing two new combined-cycle power plants in Mérida and Valladolid, which will add more than 1,700 MW of installed capacity and reduce the electricity generation deficit facing the Yucatán Peninsula (Yucatán Energy Agency, 2024).

The state has also strengthened its position as one of the leading renewable energy hubs in southern and south-eastern México, accounting for the largest installed wind energy capacity in the peninsula region and ranking among the national leaders in interconnection contracts for distributed solar photovoltaic generation. In 2023 approximately 15% of the electricity generated in the state came from renewable sources (Yucatán Energy Agency, 2024).

Yucatán's energy infrastructure includes three wind farms and two photovoltaic parks, which together provide 298 MW of installed capacity. In addition, wind energy projects currently under development are expected to contribute a further 195 MW in the coming years, strengthening regional energy security and reinforcing Yucatán's attractiveness for energy-intensive industries and projects linked to the energy transition (Yucatán Energy Agency, 2024).

## The state's digital infrastructure continues to expand.

Yucatán has connectivity coverage reaching close to 98% of the population, supported by fibre-optic networks, mobile telecommunications infrastructure, data centres, and internet exchange points (Denis et al., 2025). Integration with the national fibre-optic network strengthens the system's resilience and redundancy, while the expansion of broadband services positions the Mérida Metropolitan Area as an attractive environment for data-intensive activities.

# 4. How will we turn the vision of Plan Yucatán into a reality?

## 4.1 Strategic pillars

The long-term vision of **Plan Yucatán: Industrial Policy of the State of Yucatán 2025–2050** is built upon five strategic pillars that together seek to strengthen the capabilities required to transform the state's productive structure, enhance its competitiveness, and ensure that the benefits of economic growth translate into greater opportunities for the entire population. These pillars respond to the principal challenges identified in the areas of talent, infrastructure, innovation, productive integration, and investment, and establish a roadmap for consolidating a sustainable, innovative, and territorially balanced model of industrial development.

The first pillar, **human talent**, recognises that the availability of specialised talent is an essential condition for productive transformation, and therefore seeks to strengthen workforce development, specialisation, and alignment with the needs of strategic sectors. The second pillar, **strategic and sustainable industrial infrastructure**, focuses on consolidating the logistics, energy, and digital capabilities required by a modern economy to integrate successfully into national and international value chains.

The third pillar, **innovation and technology for development**, is aimed at strengthening an ecosystem capable of generating, transferring, and applying knowledge to drive productivity and the development of new industries. The fourth pillar, **supply chain development and regional integration**, seeks to strengthen local supply networks, connect the productive capabilities of the territory, and integrate Yucatán's businesses into national and global value chains.

Finally, the aim of the fifth pillar, **global engagement and investment attraction**, is to position Yucatán as a competitive and trusted destination for investment through stronger connections with markets, businesses, and strategic partners at both national and international levels. These five pillars are complemented by the **cross-cutting vision of shared prosperity**, which ensures that the benefits of economic development reach all people and regions of the state by promoting economic inclusion, reducing social and territorial disparities, and creating quality employment.

Together, these pillars constitute the strategic framework that will guide the development of a more competitive, innovative, inclusive, and sustainable Yucatán by 2050.

*Figure 5. Five strategic priorities for building a more competitive, innovative, prosperous, inclusive, and sustainable Yucatán*

| Strategic pillar | 2030 | 2035 | 2040 | 2050 |
|---|---|---|---|---|
| **1. Human talent** | Build the talent capabilities required for industrial transformation | Scale talent development to support productive sophistication | Consolidate a competitive talent ecosystem | Yucatán is established as a national leader in the development, attraction, and retention of highly specialised talent, capable of driving advanced, knowledge-intensive, high-value-added industries. |
| **2. Strategic and sustainable industrial infrastructure** | Build the foundations for logistics and productive integration | Develop competitive industrial corridors | Position Yucatán as a regional industrial and logistics hub | Yucatán is established as the leading industrial and logistics hub in south-eastern México, and a Latin American benchmark, with modern, sustainable infrastructure integrated into major national and international markets. |
| **3. Innovation and technology for development** | Build the capabilities for innovation and technological development | Scale innovation to support productive sophistication | Consolidate a leading innovation and technology ecosystem | Yucatán is established as a national and international leader in applied innovation, with an ecosystem that transforms science, technology, and knowledge into productive solutions, innovative businesses, and advanced industrial capabilities. |
| **4. Supply chain development and regional integration** | Build the foundations for local productive integration | Scale the development of regional value chains | Consolidate Yucatán's integration into national and international value chains | Yucatán is established as a strategic hub within national and global value chains, supported by a competitive, specialised local supply base that is deeply integrated into the state's industrial development. |
| **5. Global engagement and investment attraction** | Build the foundations of an attractive investment environment | Scale promotion and engagement with global markets | Consolidate Yucatán's position as a strategic investment destination | Yucatán is positioned as a global destination for high-value-added investment, recognised for its certainty, talent, and infrastructure, and its capacity to attract, develop, and retain long-term strategic projects. |

### 4.1.1 Human talent

Human talent is one of the principal enablers of Yucatán's productive transformation. The state has important strengths in this area, including an extensive network of upper-secondary and higher education institutions and growing participation in STEM disciplines. But challenges remain in aligning educational provision with the needs of the productive sector.

#### Vision 2050

Yucatán has highly specialised human talent and is recognised for its ability to develop, attract, and retain talent, contributing to the state's leadership in high-technology and low-carbon industries.

#### Objective

Strengthening the development, specialisation, alignment, and retention of human talent to meet the needs of Yucatán's productive transformation, drive innovation, and enhance the state's competitiveness.

#### Roadmap to 2050

The proposed roadmap recognises that talent development is a cumulative process that requires the simultaneous strengthening of educational provision, engagement with the productive sector, and opportunities for labour market integration. The strategy is therefore structured around three complementary stages: first, building the capabilities needed to meet the current demands of industrialisation; second, scaling the specialisation, certification, and relevance of talent; and finally, consolidating an ecosystem recognised for its ability to develop, attract, and retain highly specialised human talent.

### *Box 2. CAST Yucatán: building the talent of the industrial renaissance*

*The consolidation of Yucatán as a hub of industrial development requires a comprehensive strategy to prepare people for the opportunities created by productive transformation. The first Technology Assistance and Services Centre (CAST) in south-eastern México will strengthen specialised technical training, skills certification, and links between education and industry.*

*CAST will position Yucatán as the leading provider of specialised technical talent in southern and south-eastern México by strengthening the training, upskilling, and certification of competencies aligned with the real needs of industry. Unlike traditional training models, the centre will combine specialised technical training, skills certification, technological assistance for businesses, and employment linkages, closing the gap between educational provision and the requirements of emerging productive sectors.*

*Its establishment responds to the growing demand for talent generated by the investments that are transforming the state's economic structure, particularly in manufacturing, logistics, technology, and energy transition industries. These investments could generate close to 200,000 jobs in the coming years, making a relevant and high-quality training system essential to ensure that these positions are filled by local talent.*

*In addition to training students, CAST will serve workers already in employment who require their skills to be updated or certified, strengthening lifelong learning as a mechanism for improving productivity, promoting labour mobility, and facilitating the adoption of new technologies by businesses. The centre will also provide technical assistance services aimed at improving productive processes, supporting the adoption of quality standards, and strengthening business competitiveness.*

*Within Yucatán's long-term vision, CAST is a fundamental component of transforming the availability of specialised talent into a sustainable competitive advantage, capable of attracting higher-value-added investment and strengthening the productivity and competitiveness of Yucatán's businesses.*

### 4.1.2 Strategic and sustainable industrial infrastructure

Strategic and sustainable industrial infrastructure is one of the principal enablers of Yucatán's economic and industrial transformation. The state has important strategic assets, including the Port of Progreso, the state road network, rail connectivity associated with the Maya Train freight service, and advances in energy and digital infrastructure. But challenges remain in coordinating these capabilities, particularly in relation to last-mile connectivity, logistics interoperability, digital coverage, and the territorial integration of productive areas. At the same time, the expansion of the Port of Progreso, the development of new industrial corridors, and growing demand for specialised infrastructure create a historic opportunity to consolidate Yucatán as a logistics and industrial platform with regional reach.

#### Vision 2050

Yucatán has modern, fully integrated, and sustainable industrial infrastructure that positions it as the leading industrial, logistics, and export hub in southern and south-eastern México, as well as a Latin American benchmark for competitiveness, sustainability, and innovation.

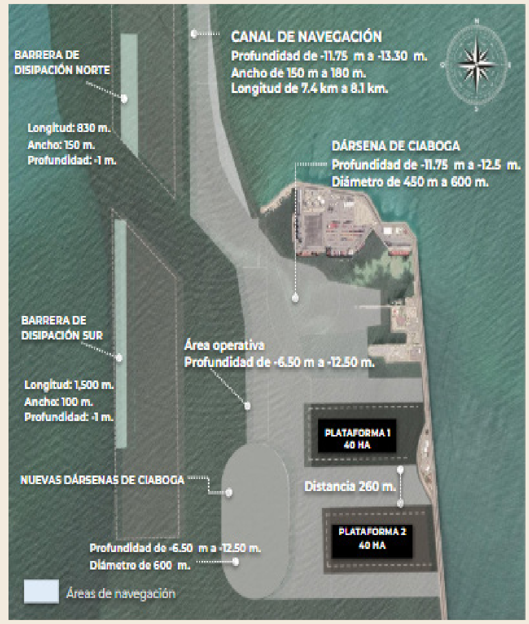
#### Objective

Developing strategic, integrated, and sustainable industrial infrastructure that strengthens territorial competitiveness, supports investment attraction, and facilitates the consolidation of Yucatán as an industrial and logistics platform of national and international significance.

#### Roadmap to 2050

The proposed roadmap will be implemented progressively through three stages focused on strengthening the integration of the state's industrial infrastructure systems. The first stage focuses on building the foundations of logistics and productive integration through modernising strategic infrastructure and strengthening territorial connectivity. The second stage seeks to develop competitive industrial corridors through greater coordination between logistics, energy, and digital infrastructure. And finally, the aim of the third stage is to position Yucatán as a regional industrial and logistics hub through specialised, resilient, and sustainable infrastructure that strengthens its integration into global supply chains.

### *Box 3. Expansion and modernisation of the Port of Progreso*




**Source:** *Ministry of Economy and Labour of the State of Yucatán, based on data from ASIPONA Progreso.*

*The expansion and modernisation of the Port of Progreso is a strategic project designed to align installed capacity with the current and future needs of the productive sector, with the aim of optimising cargo flows, reducing logistics times, and facilitating integration of the port with the state's industrial corridors.*

*The project has two main components: expanding the navigation areas, including the navigation channel and turning basin; and constructing two new operational platforms. Together, these investments are intended to strengthen the port's logistics, operational, and maritime service capabilities.*

*Expanding the navigation areas will improve manoeuvrability and access conditions for vessels with greater draught and cargo capacity. These enhancements will allow the port to accommodate ships of up to 60,000 tonnes.*

*And constructing the new operational platforms will enable the development of new port business lines, including specialised terminals for liquefied natural gas, liquefied petroleum gas, green hydrogen, ferrous scrap, shipbuilding, and other activities linked to import and export sectors.*

*ASIPONA Progreso and the Government of the State of Yucatán are carrying out feasibility studies and strategic engagement processes with companies operating in these sectors to identify operational requirements, infrastructure needs, and market opportunities. The objective is to guide port development towards high-value-added activities aligned with the strategic sectors targeted for growth in the state.*

*With these new capabilities, the port is being consolidated as a strategic asset for Yucatán's industrial transformation by strengthening its operational capacity, improving logistics connectivity, and creating more competitive conditions for investment attraction, international trade, and the integration of Yucatán into global supply chains.*

## 4.1.3 Innovation and technology for development

Yucatán has significant assets to support the development of a knowledge-based economy, including the presence of universities, research centres, scientific infrastructure, and a growing community of entrepreneurs and innovative businesses. But challenges remain in relation to knowledge transfer to the productive sector, the adoption of technology by businesses, financing for innovation, coordination among ecosystem stakeholders, and the generation of technological solutions aimed at addressing the state's economic, social, and environmental challenges.

### Vision 2050

Yucatán is recognised as a national and international leader in applied innovation, technological development, and knowledge generation, supported by a dynamic ecosystem that transforms science and technology into solutions that drive productivity, competitiveness, and sustainable wellbeing.

### Objective

Strengthening innovation, technological development, and knowledge-transfer capabilities to accelerate productive transformation, increase competitiveness, and consolidate a knowledge-based economy.

### Roadmap to 2050

The proposed roadmap envisions progress from strengthening scientific and technological capabilities, through a stage characterised by greater technology transfer and applied innovation, to the consolidation of an ecosystem capable of generating technology solutions, and innovative businesses that drive Yucatán's competitiveness and sustainable development.

## 4.1.4 Supply chain development and regional integration

Supply chain development and regional integration are among the principal challenges involved in consolidating the benefits of Yucatán's industrial transformation. The state has important strengths in this area, including an export-oriented manufacturing sector and the *Polos de Desarrollo para el Bienestar* industrial hubs as an emerging platform for the development of regional clusters. But challenges remain related to the limited level of verifiable local sourcing, the state's relatively low level of economic complexity, and the limited participation of MSMEs in productive collaboration schemes with anchor companies.

### Vision 2050

Yucatán is established as a strategic node within national and global value chains, supported by a competitive, specialised local supplier base that is deeply integrated into the state's industrial development.

### Objective

Strengthening integration of the state's productive value chains through the development of local suppliers, the territorial coordination of productive capabilities, and the integration of Yucatán's businesses into national and international value chains.

### Roadmap to 2050

The proposed roadmap recognises that productive integration is a cumulative process that requires the simultaneous strengthening of local supply networks, coordination among strategic sectors, and logistics connectivity with other regions. The strategy is therefore structured around three complementary stages: first, building the foundations of local productive integration; second, scaling the development of regional value chains; and finally, consolidating Yucatán's integration into national and international value chains.

### 4.1.5 Global engagement and investment attraction

Global engagement and investment attraction are decisive components of accelerating Yucatán's productive transformation. The state has significant competitive advantages when it comes to attracting high-value-added investment, including its strategic location between the Gulf of Mexico and the Caribbean, institutional stability, and expanding logistics infrastructure. Nevertheless, challenges remain in relation to the limited attraction of foreign direct investment in industrial sectors, the productivity gap relative to the rest of the country, and the modest share of medium- and high-technology exports within the state's total exports.

#### Vision 2050

Yucatán is positioned as a global destination for high-value investment, recognised for its certainty, talent, infrastructure, and capacity to attract, develop, and retain strategic long-term projects.

#### Objective

Promoting a reliable and attractive environment for national and international investment through strategic partnerships, comprehensive investment promotion strategies, and the effective use of global economic trends to strengthen industrial development and job creation.

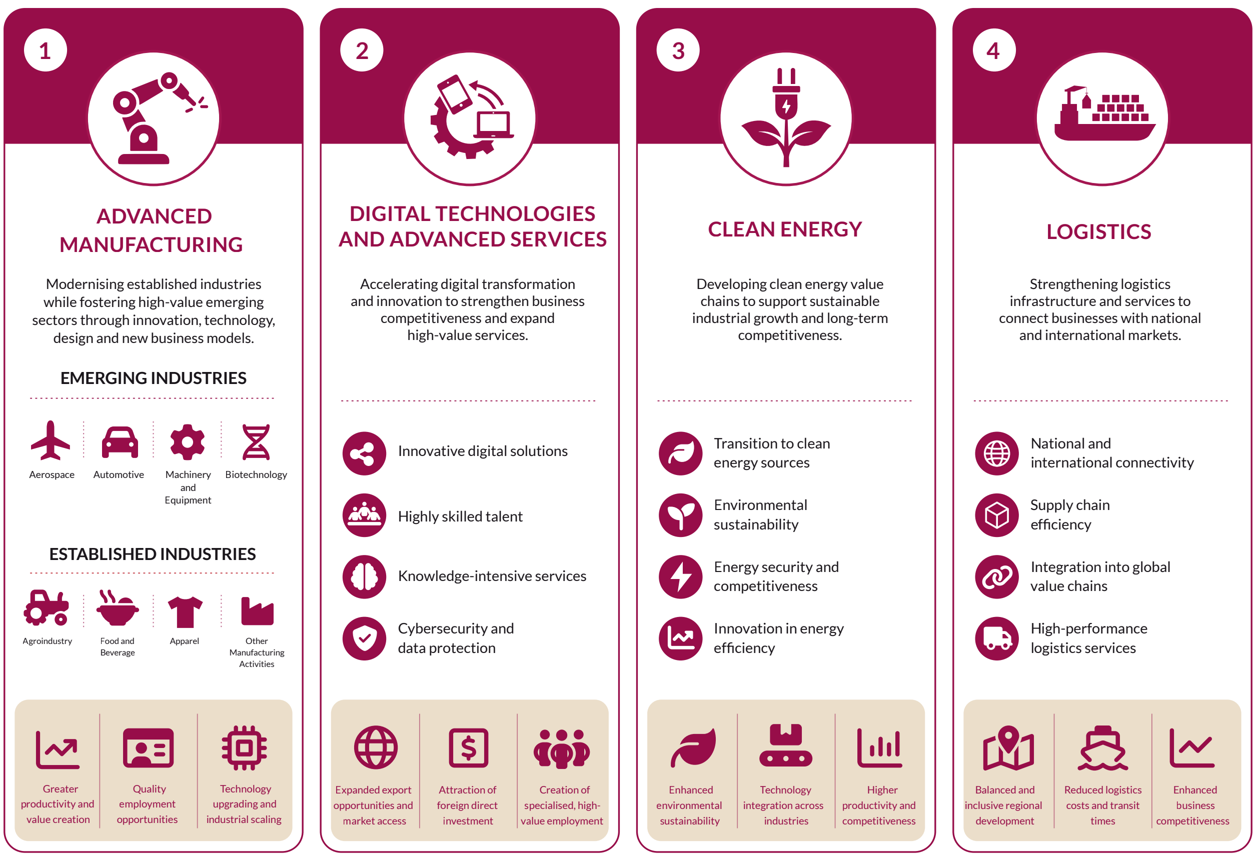
#### Roadmap to 2050

The proposed roadmap recognises that positioning Yucatán as an investment destination is a cumulative process that requires the simultaneous strengthening of international promotion, engagement with strategic markets, and the conditions that provide certainty for investment. The strategy is therefore structured around three complementary stages: first, building the foundations of an attractive investment environment; second, scaling promotion efforts and engagement with global markets; and finally, consolidating Yucatán's position as a strategic investment destination.

## 4.2 Strategic sectors

Plan Yucatán prioritises four strategic sectors with the potential to accelerate the state's productive transformation: advanced manufacturing, digital technologies and advanced services, clean energy, and logistics. These sectors were chosen for their capacity to generate greater value added, create formal and well-paid employment, attract investment, drive innovation, and strengthen Yucatán's integration into national and international value chains. They also align with global trends in reindustrialisation, the energy transition, digitalisation, and investment relocation that are reshaping territorial competitiveness.

*Figure 6. Strategic sectors of Plan Yucatán*




## Advanced manufacturing

Advanced manufacturing is the principal driver of Yucatán's industrial transformation. The strategy for the development of this sector combines two complementary processes: modernising traditional industries of significant economic and employment importance; and developing emerging industries with higher technological intensity. This approach recognises that industrial competitiveness depends on not only the products being manufactured but also the ability to incorporate technology, knowledge, design, and new business models into production processes.

Among the emerging industries, the aerospace, automotive, and machinery and equipment sectors stand out, having demonstrated strong dynamism in value added, exports, and foreign direct investment. Biotechnology also forms part of this group of industries, building on the state's specialised scientific and research capabilities. Biotechnology offers particularly relevant opportunities for sectors already established in Yucatán, including food production, agribusiness, healthcare, and solutions that support industrial sustainability. At the same time, traditional sectors such as agribusiness, food and drink manufacturing, and apparel will continue to play a central role in the state's productive structure, while advancing towards higher levels of value added, sustainability, and technological integration.

## Digital technologies and advanced services

Digital technologies and advanced services are a cross-cutting enabler for all productive sectors. Technologies such as artificial intelligence, data analytics, the internet of things, industrial automation, and cloud computing are transforming the way businesses design, produce, and commercialise goods and services. Their adoption makes it possible to increase productivity, strengthen competitiveness, and generate new knowledge-intensive economic activities.

Yucatán has experienced significant growth in activities such as scientific research and development, computer systems design services, and specialised consultancy services, reflecting the consolidation of an innovation ecosystem with the potential to integrate into global value chains. Strengthening this sector will contribute to accelerating business digitalisation, technology transfer, and the development of new knowledge-based enterprises.


## Clean energy

The energy transition represents both a challenge and an opportunity for Yucatán's industrial development. Internationally, value chains linked to renewable energy, energy storage, low-carbon hydrogen, and industrial electrification have become priority sectors for industrial policy because of their contribution to competitiveness, energy security, and sustainability.

Yucatán has significant advantages that position it to participate in this transition. The expansion of electricity infrastructure, the strengthening of natural gas supply, and the development of wind and solar projects are improving the conditions for attracting energy-intensive industrial investment. At the same time, these capabilities create opportunities to develop new economic activities associated with energy efficiency, specialised engineering services, and clean technologies.

## Logistics

Yucatán's geographical location and the expansion of its logistics infrastructure make logistics one of the pillars of its industrial development strategy. The expansion of the Port of Progreso, the Maya Train freight service, industrial corridors, and the modernisation of the transport network are strengthening the state's connectivity with national and international markets and creating favourable conditions for attracting productive investment.

Beyond the movement of goods, modern logistics incorporates digital technologies, advanced supply chain management, specialised warehousing, and high-value-added distribution services. These activities reduce costs, increase operational efficiency, and help to position Yucatán as a strategic logistics hub for south-eastern México and North America.

The combination of advanced manufacturing, digital technologies, clean energy, and logistics provides the foundation for an industrial strategy that is aligned with the state's productive and innovation capabilities. These sectors should not be viewed as isolated areas of activity but as components of an interconnected industrial ecosystem in which innovation, human talent, infrastructure, and sustainability become the drivers of long-term competitiveness.

# 5. How will progress be evaluated and the course corrected when necessary?

The productive transformation of Yucatán requires a long-term vision, as well as mechanisms that make it possible to monitor progress, identify challenges, and adjust public policy actions in a timely way. The success of Plan Yucatán will depend on not only defining objectives and strategies but also the capacity to measure results, learn from experience, and continuously strengthen interventions aimed at industrial development, competitiveness, and shared prosperity. Evaluation is therefore a fundamental component of public management and a tool for ensuring that the efforts undertaken translate into benefits for the population.

To this end, the plan will incorporate a set of indicators aligned with Vision 2050, the strategic pillars, the state's development goals, and medium-term plans. These indicators will enable the monitoring of key dimensions such as productivity, employment, wages, innovation, human talent development, industrial infrastructure, sustainability, and economic inclusion. Each indicator will be accompanied by a technical specification sheet detailing its definition, calculation method, unit of measurement, frequency, source of information, responsible entity, and baseline, with the aim of ensuring transparency, comparability, and methodological rigour.

Evaluation is not conceived solely as an accountability exercise but as a permanent mechanism for learning and continuous improvement. The regular monitoring of results will make it possible to identify progress, detect areas of underperformance, and implement the adjustments required to respond to changes in the economic, technological, and social environment. In this way, the evidence generated will become a key input for decision-making and for updating priorities whenever circumstances require it.

Responsibility for coordinating this process will rest with the Ministry of Economy and Labour, working in close collaboration with the Ministry for Planning and Evaluation, the government departments involved in implementing the strategy, and the various stakeholders that participate in the state's economic development ecosystem. Permanent spaces for dialogue and follow-up will also be promoted with the productive sector, academic institutions, research centres, and civil society, with the aim of incorporating complementary knowledge, perspectives, and capabilities that strengthen implementation of the plan.

Plan Yucatán is conceived as a dynamic instrument combining strategic vision, continuous monitoring, and the capacity to adapt. Measuring progress, correcting course when necessary, and reporting transparently will help to ensure that the state's productive transformation effectively contributes to building a more competitive, innovative, sustainable, and inclusive Yucatán, with opportunities for all people and regions.

# References


American Chamber of Commerce of México (2024). *Business Security Survey 2024*. https://amcham.org.mx/sondeoseguridad2024/

Chang, H. J., Andreoni, A. and Kuan, M. L. (2013). *International industrial policy experiences and the lessons for the UK.* Future of Manufacturing Project: Evidence Paper 4.

Denis, C., Ramírez, T. and González, E. (2025). *Digital connectivity assessment in the Yucatán Peninsula.* Internet Exchange Services Yucatán, EFTS Group. https://efts-group.com/wp-content/uploads/2025/01/20250131_Informe_Diagnostico_SMC_Yucatan_MX.pdf

Economic Commission for Latin America and the Caribbean (ECLAC) (2026). *Panorama de las Políticas de Desarrollo Productivo en América Latina y el Caribe, 2025: ¿cómo salir de la trampa de baja capacidad para crecer?* (LC/PUB.2025/14-P/Rev.1). Santiago.

Federal Civil Aviation Agency (2022). *Statistics on scheduled and charter commercial aviation across multiple indicators.* https://www.gob.mx/afac/acciones-y-programas/estadisticas-280404

Government of Mexico (2022). *Electricity consumption (GWh) by sector and federal entity.* https://energia.conacyt.mx/planeas/electricidad/consumo

Government of Mexico (2025). *Plan México: A strategy for equitable and sustainable economic development for shared prosperity*. https://www.planmexico.gob.mx

Institute for Economics and Peace (IEP) (2026). Mexico Peace Index 2026. https://indicedepazmexico.org/

Institute for Mobility and Territorial Urban Development (2025). *Medium-Term Programme 2025–2030: Territorial planning and urban development*. Government of the State of Yucatán.

Institute for the Development of Maya Culture of the State of Yucatán (2025). *Medium-Term Programme 2025–2030: Maya People, Root and Reason for Being.* Government of the State of Yucatán.

Mexican Institute for Competitiveness (IMCO) (2025). *State Competitiveness Index 2025*. https://imco.org.mx/indice-de-competitividad-estatal-2025

Mexican Institute of Industrial Property (IMPI) (2026). *Patents and registrations granted to Mexican residents by federal entity*. https://datosabiertos.impi.gob.mx/Paginas/Invenciones_cifras_Mapas.aspx

Ministry of Economy (2025). *Foreign direct investment in Mexico: cumulative quarterly flows since the beginning of each year, by federal entity and economic activity.* Third quarter 2025 data https://www.gob.mx/se/acciones-y-programas/competitividad-y-normatividad-inversion-extranjera-directa?state=published

Ministry of Economy and Labour of Yucatán (SETY) (2025). *Medium-Term Programme 2025–2030: Economic development.* Government of the State of Yucatán.

Ministry of Education of Yucatán (SEGEY) (2025). *Medium-Term Programme 2025–2030: Humanistic excellence in education.* Government of the State of Yucatán.

Ministry of Education of Yucatán (SEGEY) (2026a). *Statistical report.* https://estadisticaeducativa.segey.gob.mx/site/cifras

Ministry of Education of Yucatán (SEGEY) (2026b). *Participating upper secondary education subsystems*. https://bachillerato.yucatan.gob.mx/

Ministry of Infrastructure for Wellbeing of Yucatán (2025). *Medium-Term Programme 2025–2030: Infrastructure for wellbeing.* Government of the State of Yucatán.

Ministry of Labour and Social Welfare (STPS) (2026). *Salario diario asociado a trabajadores asegurados en el IMSS por entidad federativa*. https://www.stps.gob.mx/gobmx/estadisticas/salarios.htm

Ministry of Science, Humanities, Technology and Innovation of the State of Yucatán (SECIHTI) (2025). *Medium-Term Programme 2025–2030: Science, technology and innovation, diagnostic section.* Government of the State of Yucatán.

Ministry of Science, Humanities, Technology and Innovation (SECIHTI) (2026). *Register of researchers with current accreditation in the National System of Researchers*. https://secihti.mx/snii/archivo-historico-del-snii/

Ministry of Sustainable Development of Yucatán (2024). *State inventory of greenhouse gas emissions and compounds in Yucatán, 2010–2023*. Government of the State of Yucatán.

Ministry of Women of Yucatán (2025). *Medium-Term Programme 2025–2030: Substantive equality.* Government of the State of Yucatán.

Ministry of Youth of Yucatán (2025). *Medium-Term Programme 2025–2030: Youth. Government of the State of Yucatán.*

National Association of Universities and Higher Education Institutions (ANUIES) (2025a). *Statistical yearbook of higher education enrolment, academic year 2024–2025*. https://anuario.anuies.mx/

National Association of Universities and Higher Education Institutions (ANUIES) (2025b). *Statistical yearbook of higher education enrolment: Historical series*. https://anuario.anuies.mx/

National Institute of Statistics and Geography (INEGI) (2022). *National Survey on the Dynamics of Household Relationships (ENDIREH) 2021: Basic tabulations.*

National Institute of Statistics and Geography (INEGI) (2024). *Economic Census 2024: Final results.*

National Institute of Statistics and Geography (INEGI) (2025a). *National Statistical Directory of Economic Units (DENUE), May 2025 edition*. https://www.inegi.org.mx/app/mapa/denue/default.aspx

National Institute of Statistics and Geography (INEGI) (2025b). *National Time Use Survey (ENUT) 2024: Basic tabulations.* https://www.inegi.org.mx/programas/enut/2024/#tabulados

National Institute of Statistics and Geography (INEGI) (2025c). *Annual exports by SCIAN activity subsector in Yucatán*. https://inegi.org.mx/programas/exporta_ef/#tabulados

National Institute of Statistics and Geography (INEGI) (2026a). *System of National Accounts of Mexico. Gross Domestic Product by Federal Entity, base year 2018*. https://www.inegi.org.mx/programas/pibent/2018/#tabulados

National Institute of Statistics and Geography (INEGI) (2026b). *National Survey of Occupation and Employment (ENOE), population aged 15 years and over*. https://www.inegi.org.mx/programas/enoe/15ymas/#tabulados

Progreso National Port System Administration (ASIPONA) (2021). *Vessel scheduling.* https://www.puertosyucatan.com/pb/index.shtml

United Nations Industrial Development Organization (UNIDO) (2020). *Industrialization as the driver of sustained prosperity*. Vienna.

United Nations Industrial Development Organization (UNIDO) (2025). *Industrial Development Report 2026. The Future of Industrialization. Building Future-ready Industries for Sustainable Development*. Vienna.

World Bank (2026). Gross domestic product (annual % growth). https://databank.worldbank.org/source/world-development-indicators#

Yucatán Energy Agency (2024). *Medium-Term Programme 2025–2030: Energy wellbeing and emissions mitigation.* Government of the State of Yucatán.

Yucatán Scientific Research Centre (CICY) (2019). *CICY proposes a comprehensive strategy for the utilisation of sargassum.* https://www.cicy.mx/noticias-y-eventos/boletin-15-cicy-propone-estrategia-integral-para-el-aprovechamiento-del-sargazo

Yucatán Scientific Research Centre (CICY) (2024). *CICY transfers AQUOX® technology to the industrial sector*. https://www.cicy.mx/noticias-y-eventos/boletin-29-cicy-transfiere-tecnologia-aquox-al-sector-industrial


RENACIMIENTO MAYA
YUCATÁN
GOBIERNO DEL ESTADO | 2024 - 2030
SETY
SECRETARÍA DE ECONOMÍA
Y TRABAJO DE YUCATÁN

RENACIMIENTO MAYA

YUCATÁN

GOBIERNO DEL ESTADO | 2024 2030

SETY

SECRETARÍA DE ECONOMÍA
Y TRABAJO DE YUCATÁN

# Plan Yucatán

## Industrial Policy of the State of Yucatán 2025–2050

A Vision for Industrial Development, Competitiveness, and Quality Jobs

Cambridge Industrial Innovation Policy

UNIVERSITY OF CAMBRIDGE