



Mexico: global economic bright spot

Strong macroeconomic fundamentals and a wealth of resources spell golden returns

As the 12th-largest economy in the world and the current chair of the G20—the world's 20 most powerful countries—Mexico has begun its internationalization drive in earnest. With a President dedicated to equality, development and prosperity, Mexico is now one of the most advanced countries in Latin America, and is flying in terms of economic growth where other countries are reining in spending due to falling revenues and slowing economic growth.

With a recently liberated oil sector and a thriving silver industry, Mexico is a real hotbed of opportunities for investors looking for long-term rewards. As José Ángel Gurría, secretary general of the Organization for Economic Co-operation and Development, said: "Mexico is not a country that people want to invest in just because is fashionable."

Investors do not work with fashion, they vote with their money and they expect their investments to grow. In order to achieve that, they want to leave their investments for 10, 20 or 30 years, because they are confident that the country is going forward in the midst of a turbulent and troubled world."

President Peña Nieto's administrative focus of improving governance and increasing investment via the tool of his ambitious reforms, from the energy sector to education and telecommunications has buoyed sentiment among domestic and foreign investors.

The new reforms have given Mexico more opportunities, and marks the beginning of a new era that the country and its population needs to take full advantage of. Now Mexico has the power to achieve the objectives they have always dreamed of, such as: equality, development and prosperity.

Mexico was the first Latin American member of the Organization for Economic Co-operation and Development (OECD)—since 1994—and is considered an upper-middle income country by the World Bank, and has the fifteenth largest nominal GDP and the tenth largest GDP by purchasing power parity. The economy is strongly



Gerardo Ruiz Esparza
Secretary of Communications and Transport

linked to those of its North American Free Trade Agreement (NAFTA) partners, especially the United States.

Mexico ranks sixth in the world and first in the Americas by number of UNESCO World Heritage Sites with 32, and is one of the most visited countries in the world with approximately 14 million international arrivals the last year.

Powerful growth from a solid base

According to Goldman Sachs, by 2050 Mexico is expected to become the world's fifth largest economy, whereas PricewaterhouseCoopers (PwC) estimated in January 2013 that by 2050 Mexico could be the world's seventh largest economy. What these major companies both expect is that the Mexican economy will go from strength to strength on the back of the reforms the current administration has made, and from the particular benefits the country has, both geographically, and in its human capital.

Mexico is a prominent member of institutions such as the UN, the WTO, the G20 and the Uniting for Consensus. And as gateway to Latin America, Mexico can trade with a single market of over 500 million people. According to the World Bank and the World



President Peña meets President Obama, reaffirming the strong bilateral relationship

Economic Forum, Mexico today is one of the most competitive countries in Latin America and one of the most attractive emerging markets for investment anywhere in the world, highlighting the position of strength it is starting its race for further development.

According to UNCTAD, Mexico has record foreign direct investment, with \$3.8 billion in 2013, higher than many developed countries, such as Spain, Germany and Holland. The flows have come mainly in recent years from the United States of America (56.4%).

Growing with the U.S.

"We are two sovereign nations that work together in both our national interests and with mutual respect," Barack Obama President of the United States of America said in a recent interview when asked about the relationship that the two neighbors share.

While both Presidents Obama and Peña Nieto face various national and international

challenges, analysts have encouraged these leaders to work together on international issues that are of vital importance for both countries. Peña has changed the focus of the fight against cartels by modernization the economy, and simultaneously encouraged the media to devote less coverage beheadings and shootings and talk about other issues such as the reform program.

As President Peña says, "First I want to extend a warm welcome to President Barack Obama in this, his fifth visit to the country, which makes it to Mexico the country most visited during his tenure, which gives us great pleasure and a great welcome honor. This is your home."

And the relationship between the existing superpower and the rapidly developing one will continue to grow and strengthen, off the back of the spectacular reforms made, and the innovative and hard working nature of Mexico. Opportunities are ripe in the heart of Central America, starting with Mexico.

"Mexico is not a country that people want to invest in just because is fashionable."

José Ángel Gurría, Secretary General, Organization for Economic Co-operation and Development

Mexico/U.S. trade relations reach new pinnacle

The flow of goods between these two economies is becoming a flood benefiting both

The rise of Mexico has been long and steady, and the economic growth spectacular when the issues the country faces with the drug cartels are taken into consideration.

The reforms are wide ranging and will touch every corner of Mexican society, especially improving the lives of the population living in the Southern states. But the reforms that excite and engage many international investors is without doubt the ones that affect the energy and infrastructure sectors.

With huge sums of money available, the government is looking to use the good faith it has won on international markets over the past decades to good use, and fire the economic growth into the upper levels of prosperity.

Juan Acra, president of the Energy Commission (COPARMEX) agrees that the energy sector is about to get the inward investment it has been crying out for. And with this investment, the country will be able to achieve its goals of becoming a world leader in the production.

He explains, "Without any doubts the recent energy reform is on of the most important reforms of the century, because it really is a reform where Mexico is included as part of the energy revolution that is happening in the world. In Mexico we have a great potential in natural resources (oil resources), and this undoubtedly requires private participation to reach the maximum potential of the production of oil, gas and of the development in general of the country."

Although six of every 10 pesos invested in the frame of the programme will be financed with federal or state budgets, the private



The recent energy reforms are the most significant for decades

sector is also expected to play a key role in infrastructure extension and upgrading under a recently implemented law on public-private partnerships (PPPs). According to the Finance Minister, Luis Videgaray, the infrastructure plan will add between 1.8 and 2 percentage points to Mexico's GDP growth rates by 2018, and, in conjunction with the structural reforms approved last year, it will create around 350,000 additional jobs in the formal sector every year.

Considering that infrastructure appears a significant hurdle to Mexico's competitiveness and the country developed a significant infrastructure gap with Asia and the OECD in the 1980s, it is good news that additional resources are being devoted to it. However, implementation challenges loom ahead, given often weak public oversight

and widespread corruption at state and local levels.

In this globalized market Mexico is competing to attract more FDI with many other nations, hence it is necessary to project an image of leadership and competitiveness to international investors, especially as world attention has been focused on one of its main competitors in the region, the recent FIFA World Cup host, Brazil. However, with the reforms, the Mexican economy now has the tools as well as the desire to become the major player in the region.

Mexico needs to promote the growth and strength of the historical bilateral relations with the U.S., and today the U.S. is the leading country for FDI into Mexico.

Mexico has a network of 12 FTAs with 44 countries, 28 Agreements for the Promotion

and Reciprocal Protection of Investments and nine trade agreements.

The country has become a reference in the aerospace and automotive industry. Thus, the NAFTA agreement has favored the competitiveness of its automotive industry and maquiladora, which already employs more than one million workers.

Mexico is the sixth largest exporter of instruments and appliances used in medical, surgical, dental and veterinary. Furthermore, it has positioned itself as the fifth apparel supplier worldwide, exporting goods worth only \$7,000 million in 2011. The growth experienced by the country is also reflected in the telecommunications industry, which grew by almost 12% during the first quarter, thanks to satellite TV, wireless and long distance.



Juan Acra
President, Energy Commission (COPARMEX)



With access to both the Pacific and the Gulf, Mexico has a privileged position



The standard of logistical support in the country is second to none in the region

Mexico, providing the corridor for world growth

Resource-rich state is ripe for investment in infrastructure, all signs point to huge expansion

The current Mexican government has unveiled a significant program of infrastructure spending to unleash the country's potential after the recent competitiveness enhancing reforms of the energy, financial, fiscal and telecommunications sectors. The huge Ps7.7 trn (\$586 bn) National Infrastructure Program for 2014 - 18 includes commitments to enhance key areas of the energy (Ps3.9trn), housing (Ps1.9trn) communications and transport (Ps1.3trn), as well as water infrastructure (Ps417bn), healthcare (Ps73bn) and tourism (Ps181bn) sectors.

Investment will be geared towards information and telecoms infrastructure, expanding access to Internet access for the whole country, better train transportation for both people and goods, deep-water oil exploration, new gas pipelines and the thorough modernization of 20 airports around the country.

It will also have a special focus on the south and southeast, home to around 40% of Mexico's poor, including states whose per-capita income is half the national average. A total of Ps1.3trn in this round of infrastructure investment has been earmarked for these regions, not including the investment planned by Petróleos Mexicanos (PEMEX).

In this context, and according to the government's projections for the impact of this round of funding, the program will be a powerful instrument to tackle income in-



Ovidio Noval Nicolau
General Manager, Coatzacoalcos Port

equality and poverty in the country.

Gerardo Ruiz Esparza, Secretary of Communications and Transport in the current administration recognizes that the wealth the country has generated over the last decade or so has not been distributed around the country, and that government can be a catalyst for the private sector to spread their capital around the Central American nation. "Infrastructure and development are inseparable concepts," he explains, "and with them investment will increase and modernized and create multiple opportunities.

"Mexico has the best conditions to be

converted into advantages: its productive capacity, geographical location, production costs and, importantly, the talent of its people and its strong and bold government, with its defined roadmap and final destination mapped out.

"The Program for Investment in Transport Infrastructure and Communications 2013-2018 will have a portfolio of projects that meet the guidelines of the National Development Plan. The focus is on the goal of building a prosperous Mexico, and with a cross strategy of democratizing productivity."

This increased and vastly improved domestic infrastructure will directly and indirectly benefit many companies that are working in the field of logistics in the country, allowing them to open up new markets within NAFTA and also with the wider trade blocks that Mexico is ingrained in.

As a country on the cusp of both North and South America, and with sea-lanes of communication with Europe, Asia and Africa open and ready to be exploited, Mexico stands to become an even bigger powerhouse of this vital aspect of modern commerce.

The Port of Coatzacoalcos, located on the Mexican Gulf shore, is one of these companies that will profit from the planned infrastructure spending, as will the regions that surround it, which have historically suffered from lack of infrastructure spending and also the development that comes with any increase in industrial output.

Coatzacoalcos has direct links to the U.S., and with the development of a transisthmus corridor that would link this bustling port with the Asian market, and in turn link that market to the southeastern coast of the U.S..

The Port of Coatzacoalcos is the busiest port in Mexico after Cayo Arcas explains its general manager, Ovidio Noval Nico-

lau, and the planned project to link up these two great bodies of water and trade gives him great hope for the future of the country and the port itself. However, he stresses that the infrastructure must be developed in a sustainable, managed way as there are many obstacles in the way, cost of developing the corridor being one of them, but also boundless opportunity.

"What is important about the port is its strategic location. Some 97.5% of the entire petrochemical industry of the country is based close to here, and I am talking about both basic and secondary petrochemicals. Proof of the importance of the area is the latest investment in Ethylene XXI, which is a Brazilian-Mexican consortium (with a 75-25 split). We are talking about an investment of \$5 billion dollars that are here."

This wealth of untapped potential will be fully realized when the spending kicks in soon, and will the planned development of the road and rail network will indeed benefit the majority of the population.

As Noval Nicolau says, "The idea of the Corridor is not a new way to compete with the Panama Canal, but instead to develop this corridor and to build industrial clusters along the corridor, so that it creates jobs for this area that has traditionally been forgotten, in places like Veracruz and Oaxaca mainly, but also in the states of Tabasco and Chiapas."

And as Ruiz Esparza explains, the savings in both cost and time that an efficient Mexico can make for its international clients will help it continue its strong growth. "Mexico is a great nation," he concludes, "and it may well be the major logistics platform of Latin America."

"As a country we have to generate substantial savings in the time and cost of transporting the goods that make up domestic production. We need to promote Mexico as an attractive center for FDI, and as well for Public-Private Partnerships."

"We need to promote Mexico as an attractive center for FDI, as well as for Public-Private Partnerships."

Gerardo Ruiz Esparza
Secretary of Communications and Transport

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Mexican business: taking on the world

Leading Mexican businesses are increasingly confident in their product, and country

Mexico is an open economy shining through its free trade agreements, its ultra competitive costs, hugely privileged geographical position, and most of all, its young highly qualified human capital that can all but guarantee access to international markets.

Mexico is also one of the most competitive countries in the world for productive investment, specifically due to its macroeconomic and political stability, its low inflation, the impressive size and strength of its domestic market, the solid and ever improving economic growth rate, and its capacity to produce advanced high-tech products.

Moreover, Mexico's commercial openness has benefited Mexicans by both creating jobs, and promoting their products and services in international markets. Mexico's industrial sector has also benefited from the free trade and economic agreements the country has signed in recent years.

One company that is taking great care to fully exploit these competitive advantages is Grupo Galas Janel and its managing director Antonio Nacif. As he explains, "In the short term for this year we are really into our export strategy. We want to export more product where we are already exporting and boosting specially the brand "Made in Mexico".

"We are working with several agencies to unify a logo that every manufacturer in the industry can use in Mexico. If you arrive in Panama, Guatemala, Costa Rica and you see products with this logo, you will automatically know that it is made in Mexico.

"In addition we are evaluating acquisitions outside Mexico, mainly in the United States and South America. Our primary goal in growth, a bit difficult to achieve, is to get three digits above the growth level. We have an expectation of growth of between 2.4% and 3% by 2014 in the country, and we're talking about 13% growth.

"As for my challenges as a director of the company is fighting against imports, mainly from China, and we do it giving what other countries are not able to offer.

"We give better products, better service and better times. I can work with any client, we deliver to my clients in October or November materials that they were supposed to



Antonio Nacif
Managing Director, Grupo Galas Janel

be delivered in July or August because of the risk transfer. Furthermore, the handling of cases by the exchange rate is another major challenge, as is the challenge of promotion, advertising and communication.

"Communicating the quality and service of the products made in Mexico has been a very strong issue not just for me as well for all manufacturers in México. I think that we all need to do a more aggressive campaign in order to promote the benefits of domestic products against imported."

Looking to the future

Even as the head of such a forward thinking group, Nacif is keenly aware of where his company came from, and as he says, "Grupo Galas Janel is a 100% mexican private company leader in adhesive tapes, known worldwide, is present throughout the country and in more than 32 countries in the Caucasian, African and Asian American continent.

"Today we have eight manufacturing facilities in Mexico City, Toluca and Monterrey. We have over five thousand employees and we are exporting to 94 countries.



Manufacturing is a key driver of the economy, and looks set to continue forward

"I think we are at a key stage in Mexico, at a time "make it or break it." I have great faith that in the short term we can achieve growth of 5% or 6%, which would be ideal. That's assuming a good budget year and a significant improvement in security. For our company, we will try to integrate Mexico, manufacturing everything here, from domestic raw materials, importing less and exporting more."

As Arturo Báez, general manager of Ultramar explains, "We have two main routes currently - Playa del Carmen - Cozumel and Cancun - Isla Mujeres, and we are now building a fleet that will have a special design (designers that are Australian and Mexican), so I think it will be a very interesting mix, something to behold.

"On the other hand, we have a very important project for Quintana Roo and Cancun where there is a marine lagoon system that comes from the boardwalk of Cancun and goes towards Cancun hotel zone.

The Cancun hotel zone receives 200,000 passengers passing through one-way daily. People talk about bridges of four billion pesos. We think that this will not solve the problem because all cars will be congesting highways anyways.

"What we want to do is that the government would solve the problem by shipping a full day service, quality and comfortable. For now, we have all the support.

"Invest in Mexico because it is the most beautiful country in the world. I have travelled to many places and none are alike. I think it is our time and what better place to invest than this. As for my business, we are companies with a vision of quality and service. We have a happy business that can make others happy. We try to be the best with Ultramar, for the company, for Mexico, and for our clients."

"Invest in Mexico because it is the most beautiful country in the world. I think it is our time and what better place to invest than this."

Arturo Báez
General Manager of Ultramar

Lines of export open for business

This idea, that there is not only the need to increase and improve international trade but also the domestic market is one that is keenly felt in the logistics industry. Today, Ultramar is the largest maritime shipping transport company in Mexico, and as such keenly feels the

need to improve the two way trade of the country, as it will help bring about the needed improvements in infrastructure they need to grow the business further, which will, in turn, pay the government back many times over with the increase in tax returns and reduced payments out to both citizens and companies.

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Convene with natural beauty in Mexico

Not a newcomer on the tourism scene, a force reawakened by the power of its natural beauty

A new tourism policy and a new cabinet have already provided Mexico with a huge boost as regards its tourism industry. There is a real and visible effort on the part of the government to push the country as a destination for all times, and all kinds, of tourist visits. The spectacular and varied countryside, the beautiful and seemingly endless beaches, the ruins of ancient cultures, and the modernity of the current one, make Mexico a most attractive package that is almost unrivalled in the region, if not the world.

And the push from the government is fully supported by all ministers, with special attention paid by Claudia Ruiz Massieu, Secretary of Tourism. As she explains, it is not about focusing on one aspect of the sector, it is about holistically developing all of them, which will improve seasonality, geographical spread and access to both the revenue and the jobs the industry will provide for local populations.

She says, "We want to develop cultural tourism, sports tourism, adventure tourism, ecotourism, luxury tourism, and medical tourism—this segment particularly has a big opportunity to grow with the U.S. market."

"If we offer a complete all-in-one experience of beach, culture and gastronomy,



Claudia Ruiz Massieu
Secretary of Tourism

we'll have a much more powerful and more competitive destination internationally."

One destination that has taken the secretary's words very seriously and has actively looked for ways in which to diversify its offer is the Jardines de Mexico. This gorgeous park is located in the state of Morelos, very near the capital Mexico City.

It consists of seven themed gardens that are dressed with nature, monumental artis-

tic expressions and a modern architectural feel with spaces that draw guests towards enjoying quiet contemplation. It is truly a place to relax, meditate and amuse yourself, and could be said to be perfect for both brand and business events.

Jardines de Mexico is located in the municipality of Jojutla, and is just 15 miles away from Cuernavaca, on the Mexico-Acapulco freeway, at kilometer 129.

This complex was opened to the public in March of this year, and brings together a treasure trove of more than 521 plant species, most of them rescued from across Mexico.

Thanks to the 126 acres that make up the Jardines, and 193 million flowers grown yearly, it is rightly called the largest flower garden in the world. With multiple 'microclimates' that are as diverse as an ethereal Mexican desert, that encapsulate Japanese mysticism or the renaissance's geometry, all lovers of the botanical will find a space to relax.

Jardines de Mexico has a Convention Centre with eight halls, constructed out of

the highest quality, and the service it provides is of the highest standards. Couple this with the ExpoChriser, an exhibition space for more than 3,500.

Jardines de Mexico's logo represents a dahlia flower, Mexico's symbol, and a representation of the country's floriculture.

It is also a metaphor of the park's philosophy: to provide guests with an experience of quality and warmth, through gardens made

for the contemplation of the beauty of flowers that promote love and respect for nature.

Another company breaking the mould is Plaza Suites, an innovative apartment/hotel chain that, like Jardines is looking to attract customers with innovation, in a very Mexican way.

As Jaime Levy, CEO, says, "Today we have a unique product the rooms are very comfortable and great service. We do not skimp on creating something where the customer feels sufficiently comfortable, we wanted to do something different and innovative." And it is this innovation that allows these two very different companies to encapsulate the new, modern Mexico.

"We offer a complete, all-in-one experience of beach, culture and gastronomy."

Claudia Ruiz Massieu
Secretary of Tourism

Mexico's second to none medical care provision

Healthcare tourism is rising as price conscious clients look for high quality, affordable care

Mexico is already famous for its beaches, nightlife and incredible hospitality, but as always the Central American nation is not resting on its laurels, and will continue to develop all aspects of the sector, from the aforementioned mass tourism, to include a recent spike in interest of medical tourism for clients from around the world.

With its highly developed medical care sector, with high standards that meet all international requirements, and low cost treatment, Mexico is one of the go to destinations for clients looking to not only save money, but also to recuperate in surroundings that will help the recovery process.

Two shining lights in the sector that have seen remarkable growth over the past few years are the Consorcio Mexicano de Hospitales and Amerimed, healthcare providers that have performed so well in the Mexican market they are looking internationally for further expansion. The provision of bilingual staff and the latest medical equipment has seen the sector become even more competitive when compared with the U.S.

Amerimed, founded in 1994, is a leading light in this area, and took great advantage of the signing of NAFTA in 1993 by importing the best possible medical equipment, and also helped to turn the tide against the brain drain the country encountered previously to this by offering the chance to work at the highest possible level for newly qualified doctors.

As Rafael Espino de la Peña, managing director of Amerimed Hospitals explains, "We

attended in 2013 to about 25,000 patients, including inpatient and outpatient. Of these 25,000 were about 6,000 foreigners. It is very important to establish whether alliances with multinational insurers and for us to keep in mind as a preferred destination.

"The first is that Mexico has a hand exceptionally qualified medical work. Before in Mexico, in the time of 1982 and Miguel de la Madrid, there was a policy of opening up our major borders and then the crown jewel that is the North American Free Trade Agreement which was signed in 1993 with President Carlos Salinas.

"Our business model is very small and medium hospitals operative focused on tourism. Our staff are 100% bilingual, we have national and international certifications. We started in malls, but gradually we built and we have four new hospitals. It has not been easy. This chain was bought by a foreign doctor, and I started representing Amerimed as a tax lawyer and then invested in the business until he ended up being completely mine.

"In Mexico there has been much investment in public education leavers traditionally many doctors and there is a huge brain drain. Do we keep them here in Mexico? Not really. The second is that, with the opening of borders, may have had the best quality equipment and virtually the same costs as in the United States or any other country. And third but not least is the location. We're down to the U.S. and Canada, we have the North American Free Trade Agreement.

"There really is an effort by the government



Rafael Espino de la Peña
Managing Director, Amerimed Hospitals



Humberto Javier Potes
Managing Director, CMH

to sell to Mexico as an attractive investment destination and could be very profitable if managed correctly and think what the government has to do is to generate economic conditions."

And it is these economic conditions that spur the rest of the sector onwards and upwards in the search for, not only clients, but also the drive to provide the best possible care for these new clients.

Consorcio Mexicano de Hospitales (CMH), run by Humberto Javier Potes, managing director, is both looking outward for new clients, yet is also looking to provide the best possible care to local patients as well.

"Only 6% of the population has major medical insurance, that percentage has remained for 15 years and people do not have more options because there is more insurance options. We are getting us to design schemes with insurers to achieve insurance much cheaper place.

"With regard to international alliances, we have one with an insurance company in Mexico with GNP for low-cost insurance and we

develop a partnership with an insurance company in the U.S.

"We're making a lot of emphasis on units of medical tourism is to make a value chain, from the medical hospital, hotel, transport and facilitator who is who comes in contact with the patient in the U.S. We have currently identified five mutual funds that are investing in hospitals in Mexico, they are buying and building hospitals, so in that sense the market is moving, it is hot. What is missing is that investors in the U.S. and around the world see the health care system in Mexico and bet on us."

Growth in the domestic market as well as the external ones look set to catapult Mexico's health sector into the international limelight, and will solidify both Amerimed's and Consorcio's place as the leading players in the country, and beyond.

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