



# Competitive Querétaro

ECONOMIC  
YEARBOOK  
2024





## MAURICIO KURI GONZÁLEZ

Constitutional Governor  
of the State of Querétaro

One of my government's goals is for Querétaro to be recognized as a state that offers great opportunities to the people of Querétaro through job creation, strengthening the health system, improving public safety, developing infrastructure, and caring for the environment.

Today, after three years of leading the government, I can say we are heading in the right direction. In just one more year, Querétaro has established itself as a national benchmark as it consolidates as a prosperous entity that offers a better quality of life to its inhabitants.

I have a great responsibility, which consists of continuing to strengthen the economy and to offer a better quality of life. It has not been an easy task achieving these goals, but the analysis of the most important indicators helps us evaluate the path we should take.

To allow citizens to be informed about the development of the state, the Ministry of Sustainable Development makes Competitive Querétaro Economic Yearbook 2024 available to the public. The document is made with the collaboration of various public and private institutions

The purpose is to present the determining factors for the entity's development, which will serve as an analytical tool to promote research and interest in understanding the progress of the state's economy.

I appreciate the daily work done by each of the public officers who make up this government. They have played a key role in the state's development. Once again, I restate my commitment to make Querétaro a better place to live, and I am certain that we will continue working together to take Querétaro to the next level.



**ING. MARCO A. DEL PRETE T.**

Secretary of Sustainable Development

In the Ministry of Sustainable Development our mission is to promote the economic development of the entity through the care of the environment, to promote a better quality of life and to maintain the competitiveness, productivity, investment attraction, employment generation and economic dynamism of our state.

We have a clear commitment, to take Querétaro to the next level and we achieve this through innovation, congruence, and commitment to environmental reality; in addition to this, we create alliances that generate synergies, to continue being a spearhead in new industries, as well as a national benchmark thanks to our resilient and flexible economy.

This Economic Yearbook is an instrument that provides a detailed description of the state's economic performance, offering accurate and up-to-date data on economic indicators, which allows the identification of trends over time, planning strategies for public policies, research, and case studies for informed decision-making.

I also acknowledge the commitment of the SEDESU team, state and municipal agencies, academic institutions, associations, and clusters, for their contributions to produce a document that will serve as a guide for decision-makers.

Teamwork allows us to have a competitive Querétaro that generates the conditions for powerful and sustainable growth.



# Contents

## 1 Sustainable Querétaro: environment

- 1.1 Geography
- 1.2 Environment and environment management
- 1.3 Sociodemography

## 2 Infrastructure and equipment

- 2.1 Urban development and housing
- 2.2 Hydraulic sector
- 2.3 Energy
- 2.4 Road and communications sector
- 2.5 Transportation and mobility

## 3 Prosperous Querétaro: Quality of Life

- 3.1 Economic development
- 3.2 Human development
- 3.3 Social development

## 4 Primary Sector

- 4.1 Evolution of primary sector
- 4.2 Activities in the primary sector
- 4.3 Livestock
- 4.4 Agricultural Census 2022
- 4.5 Aquaculture and fishing
- 4.6 Forestry
- 4.7 Mining
- 4.8 Inhabitants of rural areas

## 5 Secondary Sector

- 5.1 Economic development
- 5.2 Industrial sector
- 5.3 Triple helix
- 5.4 Industrial parks and zones
- 5.5 Environmental impact
- 5.6 Regulatory Improvement
- 5.7 Moody's and S&P Credit Ratings

## 6 Tertiary Sector

- 6.1 Commercial and service development
- 6.2 Commerce in Querétaro
- 6.3 Foreign Direct Investment (FDI)
- 6.4 Services
- 6.5 Micro, small and medium-sized enterprises (MSMEs)
- 6.6 Support and promotion of companies
- 6.7 Directory of chambers and associations of the sector

## 7 Tourism and culture

- 7.1 Tourism
- 7.2 Culture

## 8 Government Services

- 8.1 Branches of government
- 8.2 Government efficiency
- 8.3 Municipal governments



## Sustainable Querétaro: environment

Querétaro has a privileged location and physical conditions that allow for the development of biodiversity. The state government carries out actions with the purpose of generating economic development while taking care of the environment, because through its preservation it will be possible to provide a dignified future for the population.



# Sustainable Querétaro: environment

## 1.1 Geography

- 1.1.1 Geographic location and territorial division of the United Mexican States
- 1.1.2 Physiography and orography
- 1.1.3 Natural regions
- 1.1.4 Climate
- 1.1.5 Soil science
- 1.1.6 Hydrology
- 1.1.7 Biodiversity

## 1.2 Environment and environment management

- 1.2.1 Air
- 1.2.2 Water
- 1.2.3 Energy
- 1.2.4 Ecological Management (EO)
- 1.2.5 Natural Protected Areas (NPA)
- 1.2.6 Waste
- 1.2.7 Environmental education

## 1.3 Sociodemography

- 1.3.1 Population structure
- 1.3.2 Birth and fertility rates
- 1.3.3 Morbidity
- 1.3.4 Mortality and Life Expectancy
- 1.3.5 Civil Registry
- 1.3.6 Indigenous peoples
- 1.3.7 Migration

# SUSTAINABLE QUERÉTARO

11,690.6  
KM<sup>2</sup> OF SURFACE AREA

18  
MUNICIPALITIES

2,658

REGISTERED SPECIES  
OF ANIMAL AND INSECTS

5,987

REGISTERED SPECIES  
OF PLANTS AND FUNGI

20.6 °C

AVERAGE WEATHER

2,368,467

INHABITANTS BY 2020





1.1

# Geography

1.1.1

## Geographic location and territorial division of the United Mexican States

CONCEPT	VALUE KM <sup>2</sup>
<b>SURFACE</b>	
Total land area	1,964,375
Continental	1,959,248
Insular	5,127
<b>INTERNATIONAL LIMITS</b>	
United States of America	3,152
Republic of Guatemala	956
Belize <sup>1</sup>	193

Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Statistical and Geographic Yearbook by State 2021), 2024.

Note: <sup>1</sup>Excludes 85.3 km of maritime boundary in the bay of Chetumal.





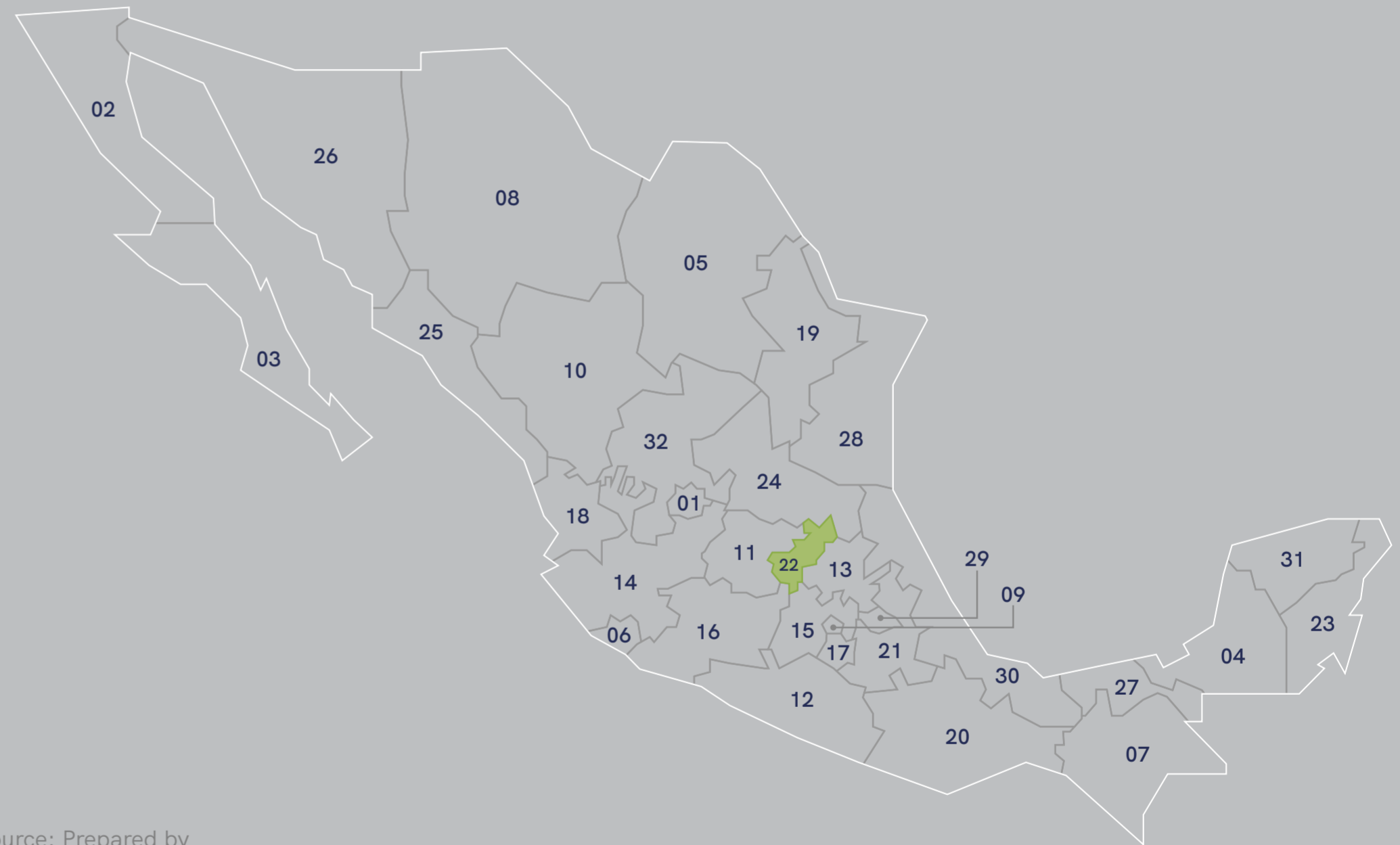


### Geographic aspects by state

#	STATE	SURFACE KM <sup>2</sup>	DISTRIBUTION	MUNICIPALITIES
1	Aguascalientes	5,615.7	0.3%	11
2	Baja California	71,450	3.6%	7
3	Baja California Sur	73,909.4	3.8%	5
4	Campeche	57,484.9	2.9%	13
5	Coahuila de Zaragoza	151,594.8	7.7%	38
6	Colima	5,626.9	0.3%	10
7	Chiapas	73,311	3.7%	124
8	Chihuahua	247,412.6	12.6%	67
9	Ciudad de México	1,494.3	0.1%	16
10	Durango	123,364	6.3%	39
11	Guanajuato	30,606.7	1.6%	46
12	Guerrero	63,595.9	3.2%	85
13	Hidalgo	20,821.4	1.1%	84
14	Jalisco	78,595.9	4.0%	125
15	Estado de México	22,351.8	1.1%	125
16	Michoacán de Ocampo	58,598.7	3.0%	113
17	Morelos	4,878.9	0.2%	36
18	Nayarit	27,856.5	1.4%	20
19	Nuevo León	64,156.2	3.3%	51
20	Oaxaca	93,757.6	4.8%	570
21	Puebla	34,309.6	1.7%	217
22	<b>Querétaro</b>	<b>11,690.6</b>	<b>0.6%</b>	<b>18</b>
23	Quintana Roo	44,705.2	2.3%	11
24	San Luis Potosí	61,138	3.1%	58
25	Sinaloa	57,365.4	2.9%	18
26	Sonora	179,354.7	9.1%	72
27	Tabasco	24,730.9	1.3%	17
28	Tamaulipas	80,249.3	4.1%	43
29	Tlaxcala	3,996.6	0.2%	60
30	Veracruz de Ignacio de la Llave	71,823.5	3.7%	212
31	Yucatán	39,524.4	2.0%	106
32	Zacatecas	75,275.3	3.8%	58
	<b>National</b>	<b>1,964,375</b>	<b>100%</b>	<b>2,475</b>

The country's internal political division is distributed among 32 states.

### Map of the United Mexican States with political division



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Socio-demographic Overview by State), 2024.

Source: Prepared by the authors with data from the National Institute of Statistics and Geography, 2024.



### Geographic position of the United Mexican States

#### EXTREME LATITUDES

##### TO THE NORTH

At monument 206, on the border with the United States of America. 32° 43' 06" North

##### TO THE SOUTH

At the mouth of the Suchiate River, bordering the Republic of Guatemala. 14° 32' 27" North

#### EXTREME LONGITUDES

##### TO THE EAST

At the southeast end of Isla Mujeres 86° 42' 36" West

##### TO THE WEST

On the Elephant Rock Point of Isla Guadalupe 118° 27' 24" West

Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Statistical and Geographic Yearbook by State 2021), 2024.



### Geographic location of Querétaro

The state is located in the center of the national territory. It borders the Estado de México, San Luis Potosí, Michoacán, Hidalgo and Guanajuato.

Its coordinates are: 21°40'12" north, 20°00'54" south, 99°02'35" east and 100°35'48" west.

### Territorial extension

Querétaro occupies a surface area of 11,690.6 km<sup>2</sup>, an area that represents 0.6% of the country's total. It is the sixth state with the smallest territorial extension.



## Division and territorial extension of the municipalities

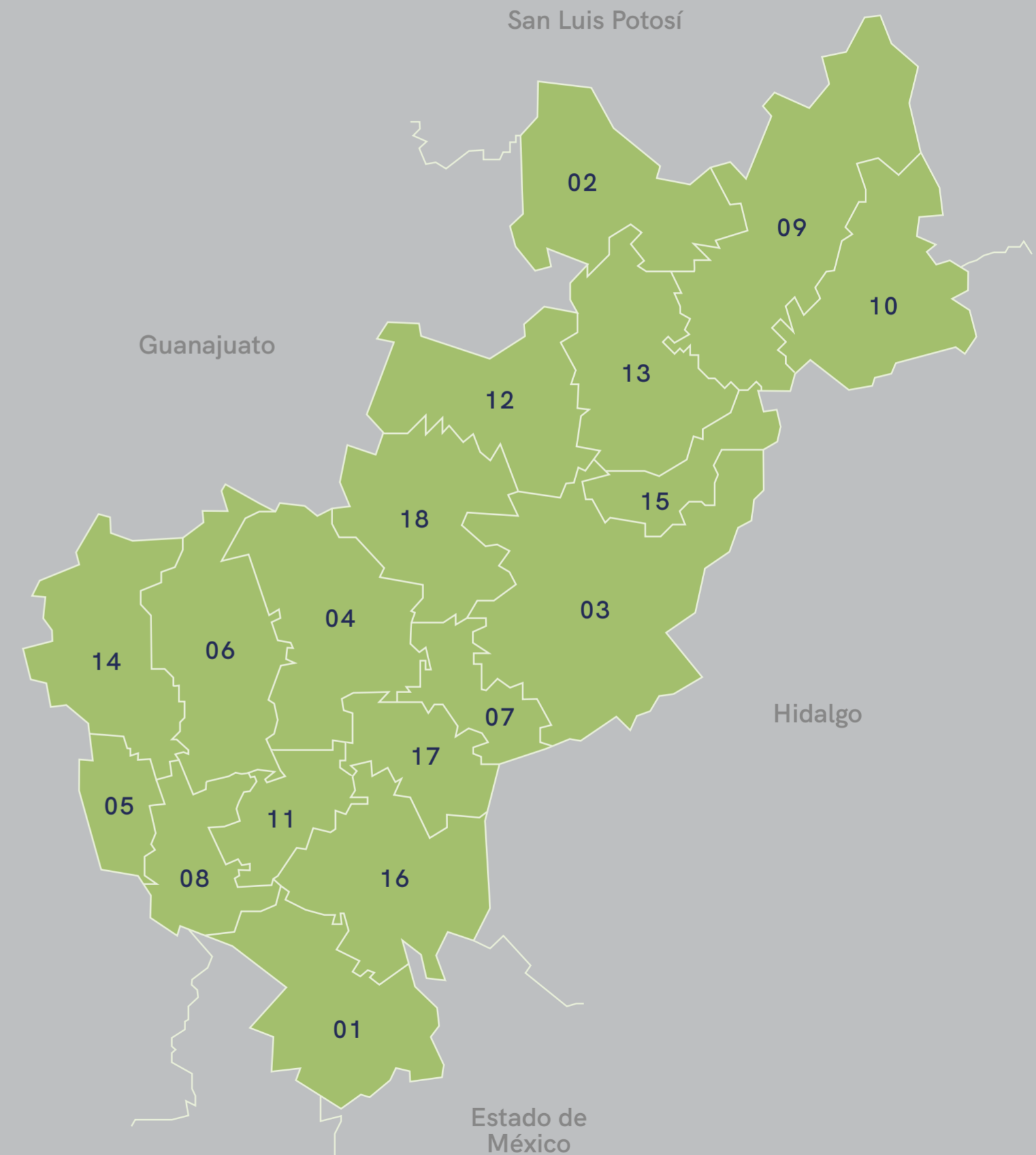
Querétaro is divided into 18 municipalities, each with particular characteristics that allow the state to have diverse resources and, consequently, a wide variety of supply of inputs.

### Geographic Aspects by municipality

#	STATE	SURFACE KM <sup>2</sup>	DISTRIBUTION	LOCATIONS
1	Amealco de Bonfil	713.3	6.1%	160
2	Arroyo Seco	732.1	6.3%	96
3	Cadereyta de Montes	1,347.4	11.5%	279
4	Colón	810.3	6.9%	157
5	Corregidora	234.9	2.0%	99
6	El Marqués	747.6	6.4%	312
7	Ezequiel Montes	300.2	2.6%	188
8	Huimilpan	388.1	3.3%	125
9	Jalpan de Serra	1,186.2	10.1%	155
10	Landa de Matamoros	719.4	6.2%	108
11	Pedro Escobedo	323.2	2.8%	113
12	Peñamiller	695.0	5.9%	138
13	Pinal de Amoles	712.1	6.1%	211
14	Querétaro	682.8	5.8%	206
15	San Joaquín	276.8	2.4%	51
16	San Juan del Río	770.9	6.6%	214
17	Tequisquiapan	369.6	3.2%	143
18	Tolimán	680.7	5.8%	119
	<b>Total</b>	<b>11,690.6</b>	<b>100%</b>	<b>2,874</b>

Source: Prepared by the authors with data from the National Institute of Statistics and Geography, 2024.

### Querétaro map with political division



Source: Prepared by the authors with data from the National Institute of Statistics and Geography, 2024.



1.1.2

### Physiography and orography

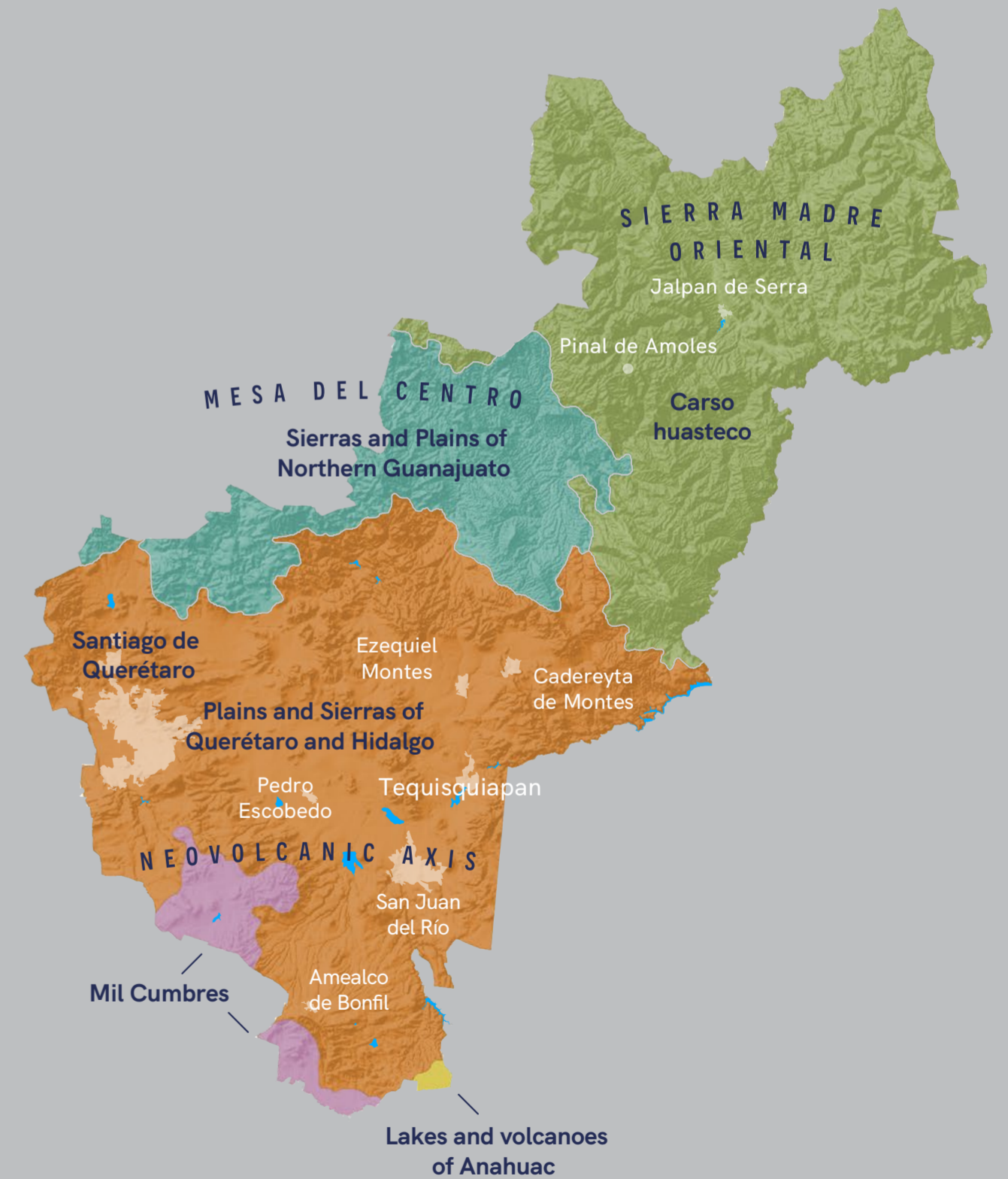
Mexico has 15 physiographic provinces; Querétaro is located within the area of influence of three of them:

- ▶ **Sierra Madre Oriental:** sedimentary rock is the most common on the surface of this province, this type of rock was uplifted and folded following an axis with an approximate south-north direction.
- ▶ **Mesa del Centro:** it is located in the center of the country and is mostly flat, characterized by wide plains interrupted by some mountain ranges. Its average altitude is 1,700 to 2,300 meters.
- ▶ **Mexican Neovolcanic Axis:** it is also known as Sierra Volcanic Transversal and is one of the provinces with the greatest variation in relief and rock types. It is the highest mountain range in the country, some peaks are crowned with permanent snow.

The surface area of these is distributed in various sub-provinces.

### Surface area by type of subprovince and main topofoms

SUBPROVINCE	TOPOFORMS	SURFACE
<b>SIERRA MADRE ORIENTAL</b>		
Carso Huasteco	Sierra	33%
	Plains	0.2%
	Typical cannon	3.4%
<b>MESA DEL CENTRO</b>		
Sierras and Plains of Northern Guanajuato	Sierra	10.8%
	Plateau	2.9%
<b>NEOVOLCANIC AXIS</b>		
Plains and Sierras of Querétaro and Hidalgo	Sierra	20.3%
	Lomerío	23.1%
	Plains	2.8%
Mil Cumbres	Sierra	2%
	Plains	0.5%
	Valley	0.7%
Lakes and volcanoes of Anahuac	Sierra	0.2%



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Geographical Aspects Querétaro), 2024.



## Main elevations

The highest geographical point in Querétaro is El Zamorano hill, located in the municipality of Colón, 40 km from the state capital. The summit reaches 3,340 meters above sea level and marks the territorial limit with the state of Guanajuato. It ranks 23rd nationally.

### Main elevations in Querétaro

HILL	ELEVATION (MASL)
El Zamorano	3,340
El Espolón	3,240
La Pingüica	3,160
Las Vigas	3,120
La Laja	3,120
La Calentura	3,060
Grande	2,820
Bravo	2,810
El Gallo	2,760
El Tejocote	2,720
La Peña Azul (Sierra)	2,700
Gordo	2,530
El Frontón	2,500
Peña de Bernal	2,430
Joya de las Papas	2,160

Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Geographical Aspects Querétaro), 2024.

Note: masl: meters above sea level.





1.1.3

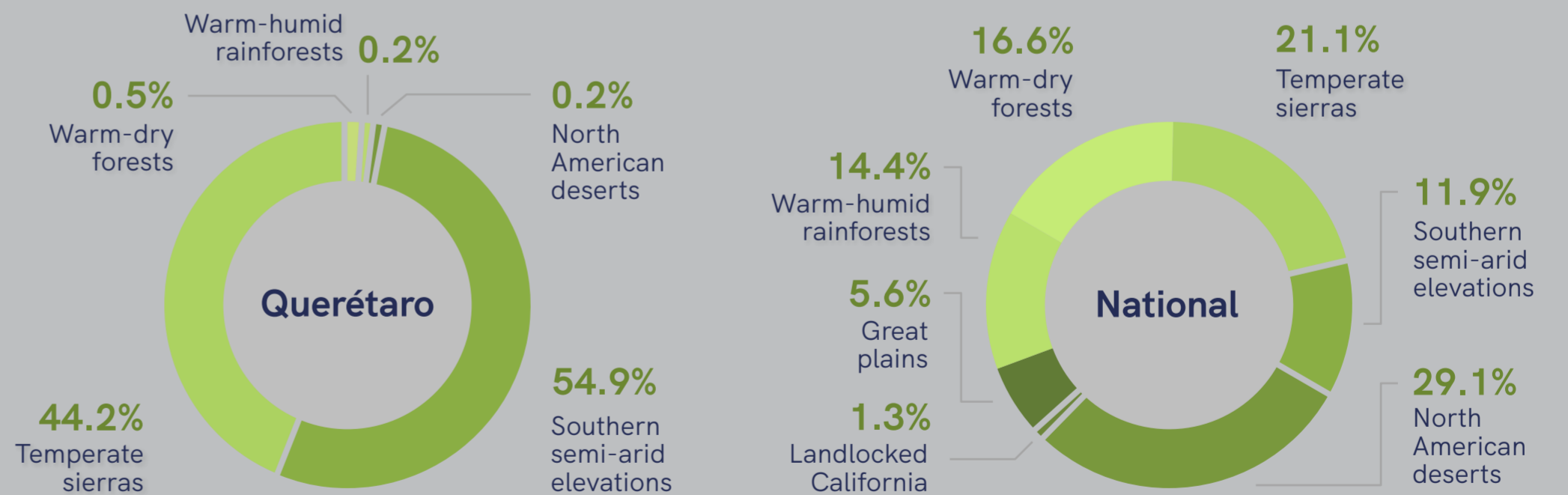
### Natural regions

#### Ecoregions

According to the Anuario Estadístico y Geográfico 2022 by state, natural terrestrial ecoregions are a regionalization that consider similar climatological, geological and edaphological conditions that represent different ecosystems of a region.

Of the total land area at the national level, the predominant ecoregion is the deserts of North America, while in Querétaro it is the semi-arid southern elevations.

### Distribution of land area by ecoregions in Querétaro and National (2022)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Statistical and Geographic Yearbook by State 2022), 2024.

Note: In the case of Querétaro, the regions are distributed as follows: 54.9% southern semi-arid elevations; 44.2% temperate mountain ranges; 0.5% warm-dry forests; 0.2% warm-humid forests; 0.2% North American deserts.



## Forestry surface

Querétaro has 737,821 hectares of forested area, of which 33.5% is forested and 66.5% is other forested areas.



Forest area by ecosystem in Querétaro (2022)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Statistical and Geographic Yearbook by State 2022), 2024.  
Note: Figures are expressed in hectares.

### 1.1.4

## Climate

Climate is the set of meteorological phenomena, such as air temperature, atmospheric pressure or air weight, winds and humidity.

Throughout Querétaro, the most predominant climates are:

- ▶ **Semi-dry temperate with summer rain, mainly in:** Cadereyta, Colón, El Marqués, Ezequiel Montes, Querétaro, San Juan del Río, Tequisquiapan and Tolimán.
- ▶ **Temperate sub-humid with summer rain, mainly in:** Amealco, Cadereyta, Huimilpan and San Juan del Río.
- ▶ **Semi-humid sub-humid with summer rain, mainly in:** Arroyo Seco, Jalpan de Serra and Landa de Matamoros.

## Climate profile

Distribution of land area by climate type (2021)

TYPE OR SUBTYPE	DISTRIBUTION
Warm sub-humid with summer rainfall	2.9
Humid semi-warm with abundant summer rainfall	1
Semi-humid sub-humid with summer rainfall	21.5
Humid temperate with abundant summer rainfall	1
Temperate sub-humid with summer rainfall	23.2
Semi-dry very warm and warm with summer rainfall	0.4
Semi-dry semi-warm with summer rainfall	9.1
Semi-dry temperate with summer rain	37.3
Dry semi-warm with summer rainfall	4.1
<b>Total</b>	<b>100</b>

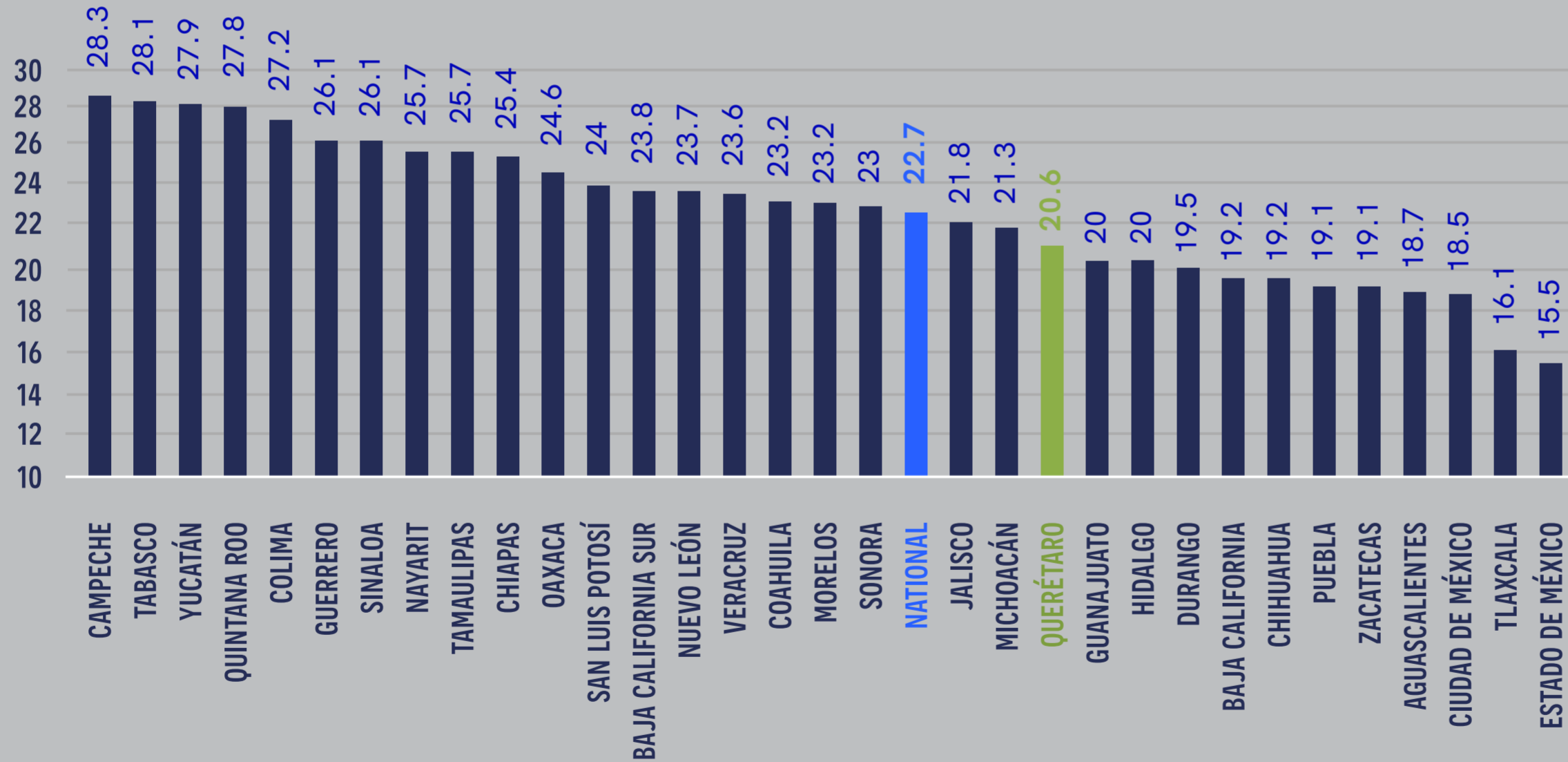
Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Statistical and Geographic Yearbook by State 2021), 2024.  
Note: Figures are expressed as a percentage.



### Average annual temperature

According to the National Meteorological Service and the National Water Commission, during 2023 the average temperature in Querétaro was 20.6 °C, 0.4 °C higher than that reported in 2022. The average temperature reached 22.7 °C nationwide.

### Average temperature by state (2023)



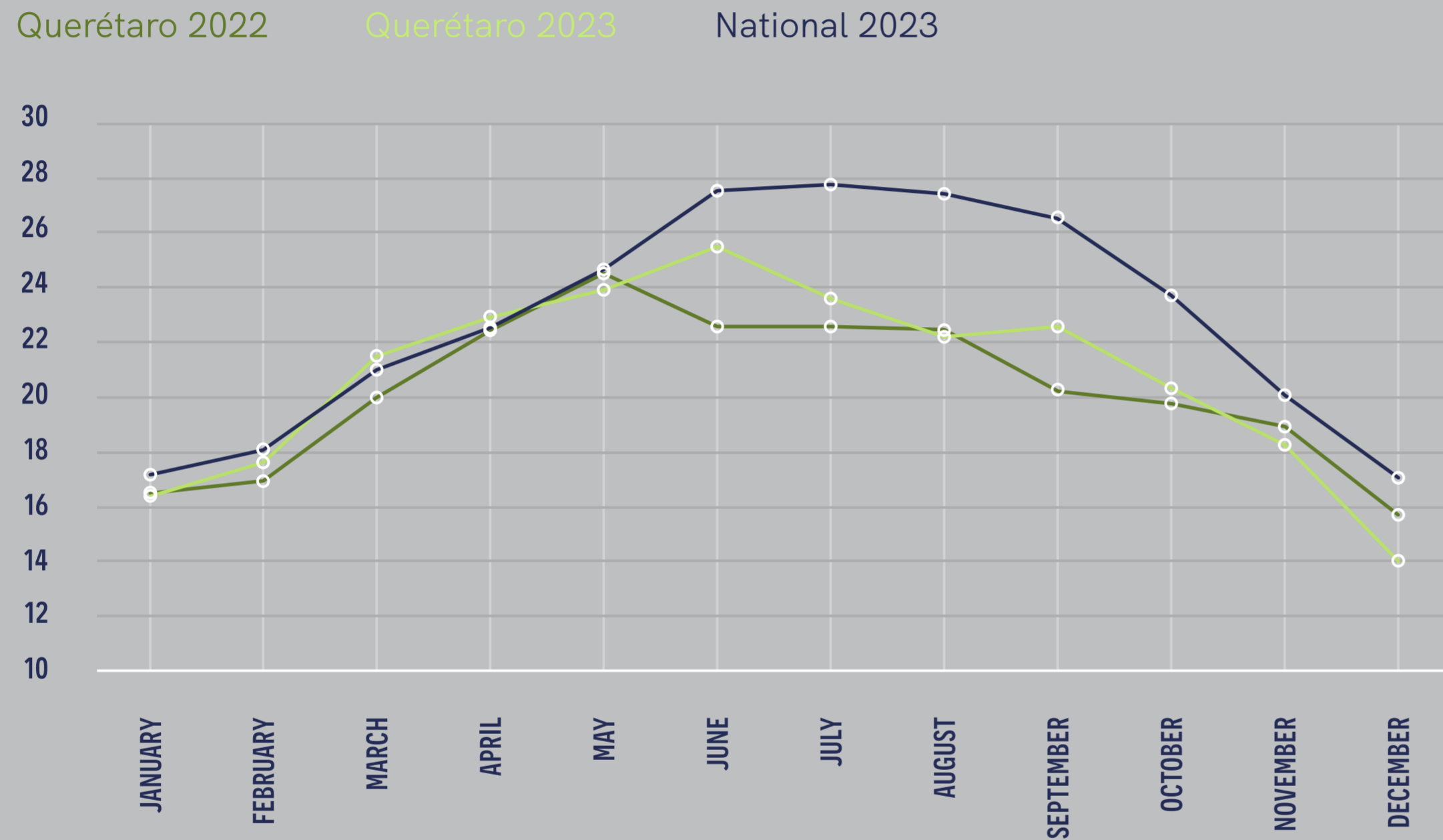
Source: Prepared by the authors with data from the National Meteorological Service (Monthly Summary of Temperatures and Rainfalls), 2024. Note: Figures are expressed in °C







### Average Temperatures in Querétaro and National (2022-2023)



Source: Prepared by the authors with data from the National Meteorological Service (Monthly Summary of Temperatures and Rainfalls 2021), 2024.

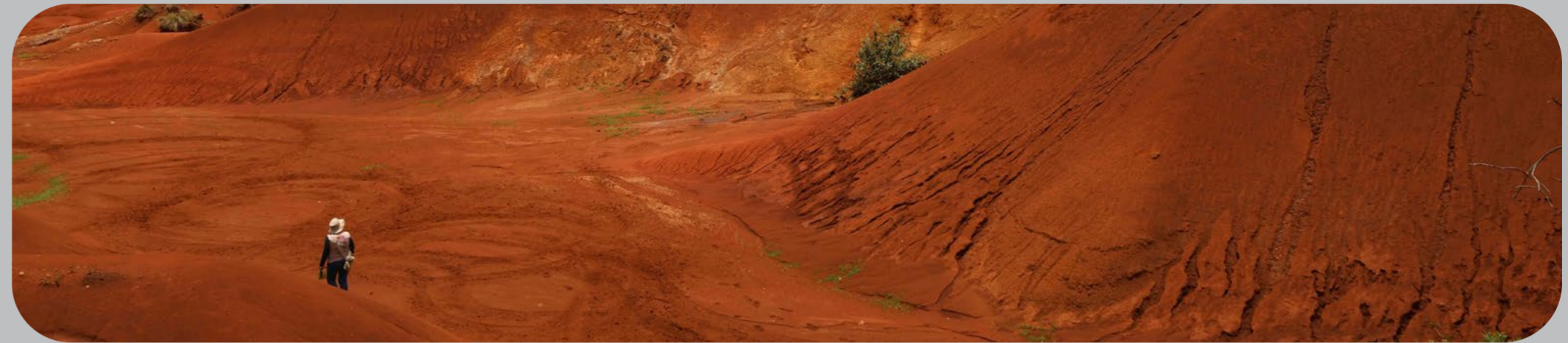
Note: The specific figures are reported in the table below in °C.

STATE	YEAR	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Querétaro	2022	16.4	16.9	19.9	22.5	24.5	22.5	22.5	22.3	20.1	19.7	18.9	15.7
	2023	16.3	17.6	21.3	22.8	23.8	25.4	23.5	22.1	22.5	20.2	18.2	14
National	2023	17.1	18	20.9	22.5	24.6	27.4	27.6	27.2	26.4	23.6	19.9	17



The maximum average temperature was reported in June, reaching 33.6 °C. This figure is 0.4 degrees higher compared to that published in 2022 in May, which was the warmest month.

The average minimum temperature was reported in January with 7.4 °C, lower than the figure published in 2022, during the same month. which the lowest temperature was reported, reaching 8.1 °C.



### 1.1.5

## Soil science

It is the study of soils based on their chemical, physical and biological properties. The importance of the discipline lies in the fact that, by knowing the characteristics of the terrain, it is possible to carry out a good agricultural, livestock, forestry, artisanal or civil engineering management.

Although soil is an important support for human activities, these can contribute significantly to its deterioration, the main causes of degradation being erosion, contamination and occupation to meet the requirements of urban and industrial growth.

According to the National Institute of Statistics and Geography (INEGI), in Querétaro there are more than 10 dominant soil groups, with different characteristics and uses.

### Type of soil and characteristics in Querétaro

TYPE OF SOIL	CHARACTERISTICS	DISTRIBUTION
Leptosol	They are very susceptible to erosion by various human activities.	30.5%
Phaeozem	Semi-dry and sub-humid climate soils, the relief where these soils develop is generally flat or slightly undulating.	23%
Vertisol	Through a tillage and drainage program, these soils are quite fertile for agriculture due to their high moisture retention capacity and their mineral exchange properties with plants. They are quite stable against erosion.	19.6%
Luvisol	Red, gray or light brown soils, generally fertile for agriculture. They are the fifth most widespread soil group in the country and are susceptible to erosion.	13.8%
Regosol	Soils with insufficient physical or chemical properties to place them in another soil group.	5.4%
Calcisol	It is one of the most widespread groups in the country, many crops in this type of soil are successful if they are fertilized.	1.7%
Cambisol	Young soils with some appreciable change in clay content or color between soil layers or horizons. They are moderately to highly susceptible to erosion.	0.9%
Planosol	They are typically found on flat grasslands that during some period of the year are covered by water, are poorly fertile, commonly with scattered shrubs and shallow root systems.	0.7%
Umbrisol	Soils of humid or sub-humid climate, mainly in mountainous environment. They are susceptible to erosion due to the effect of deforestation of the forest or jungle where they are continuously located.	0.3%
Other	-	4.3%

Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Geographical Aspects Querétaro), 2024.



## 1.1.6

## Hydrology

According to the Ministry of Environment and Natural Resources, Mexico has 37 hydrological regions, each of which contains at least one watershed, and no watershed is in more than one hydrological region.

### Surface hydrology

In terms of bodies of water and their characteristics, Querétaro is located on the Pacific Ocean slopes of the Lerma-Santiago region and on the Gulf slope of the Mexico-Pánuco area.

The Lerma-Santiago region is one of the most important in the country, with an area of 132,916 km<sup>2</sup>; it is made up of the Lerma-Toluca and Laja river basins, which represent 1.8% and 19.4% of the state's total water surface, respectively. The area has an average annual natural runoff volume of 13,061.6 cubic hectometers (hm<sup>3</sup>) and an average annual availability of 9,503.8 hm<sup>3</sup>.

### Surface hydrology of Querétaro

REGION	CUENCA	DISTRIBUTION OF THE STATE'S SURFACE AREA	SUB-BASIN	DISTRIBUTION OF THE STATE'S SURFACE AREA
Lerma-Santiago	Lerma-Toluca	1.8%	Atacomulco-Paso de Ovejas	1.8%
	Laja	19.4%	Apaseo	19.4%
			(Subway Drainage)	4.4%
Pánuco	Tamuín	23.2%	Santa María Bajo	18.6%
			Tamuín or Tampaón	0.3%
	Moctezuma	55.6%	Caracol drainage	7.1%
			Arroyo Zarco	0.5%
			Axtla	0.9%
			Extoraz	24.2%
			Moctezuma	6%
			Prieto	2.2%
			San Juan	14.3%
			Tecozutla	0.2%
<b>Total</b>		<b>100%</b>		<b>100%</b>

Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Geographical Aspects Querétaro), 2024.

The Pánuco region is located in the central part of the Sierra Madre Occidental and covers an area of 96,989 km<sup>2</sup>; it is made up of the Tamuín and Moctezuma river basins, covering a state water

surface area of 23.2% and 55.6%, that is, three quarters of the total. It has an average annual volume of natural runoff of 20,223.6 hm<sup>3</sup> and an average annual availability of 49,069.6 hm<sup>3</sup>.



### Aquifers in the state of Querétaro (2023)

HYDROLOGICAL-ADMINISTRATIVE REGION	AQUIFER	MUNICIPALITIES IT COMPRISES	R <sup>1</sup>	DNC <sup>2</sup>	VEAS <sup>3</sup>	DMA <sup>4</sup>
VIII. Lerma-Santiago-Pacífico	Valley of Querétaro	Corregidora, El Marqués and Querétaro	70	4	131.6	-65.6
	Valley of Amazcala	El Marqués	34	2.8	54.4	-22.2
	Valley of Buenavista	El Marqués and Querétaro	9.5	0.1	23.3	-13.9
	Valley of Huimilpan	Corregidora, Huimilpan and Pedro Escobedo	20	2	22.5	-4.5
IX. Northern Gulf	Valley of San Juan del Río	Amealco, Colón, El Marqués Huimilpan, Pedro Escobedo, Querétaro, San Juan del Río and Tequisquiapan.	277.9	0	334.8	-56.9
	Valley of Tequisquiapan	Colón, Ezequiel Montes and Tequisquiapan	108.1	2.6	110.6	-5.1
	Valley of Cadereyta	Cadereyta and Ezequiel Montes	4.1	0	3.7	0.4
	Tolimán	Cadereyta, Colón, Pinal de Amoles, Peñamiller, San Joaquín and Tolimán.	8.4	2.9	10.4	-4.9
	Valley of Amealco de Bonfil	Amealco	22.5	0.8	19.1	2.6
	Moctezuma	Cadereyta and San Joaquín	50	6.5	0.3	43.2
	Tampaón (sierra zone)	Arroyo Seco, Jalpan de Serra and Pinal de Amoles	49	13.6	2.9	32.5

### Sources of supply

According to the National Water Commission (CONAGUA), there are 653 aquifers nationwide. Querétaro is located at the confluence of 11 of them, which are presented on the following table.

Source: Prepared by the authors with data from the National Water Commission (Availability by Aquifer), 2024.

Notes: Figures are expressed in hm<sup>3</sup>/year

Figures correspond to the latest cut-off date (December 30, 2022), however, the publication of the same was in 2023.

DMA = R - DNC - VEAS

<sup>1</sup> Average Annual Recharge.

<sup>2</sup> Committed Natural Discharge.

<sup>3</sup> Groundwater Extraction Volume.

<sup>4</sup> Calculation of Average Annual Availability.



1.1.7

**Biodiversity**

It is defined as the variability of life that exists in an ecosystem, considering plants, animals, fungi and microorganisms. According to the National Commission for the Knowledge and Use of Biodiversity, Mexico is considered a megadiverse country, as it is part of a select group of nations with a great diversity of animals and plants; this group of countries represents close to 70% of the world's diversity of species.

Querétaro also has a wide biodiversity, mainly due to the interaction between physiographic provinces, as well as the presence of different geographic formations that favor the development of multiple ecosystems. There are a total of 7,879 species and 204,131 records of them.





### Animals and insects

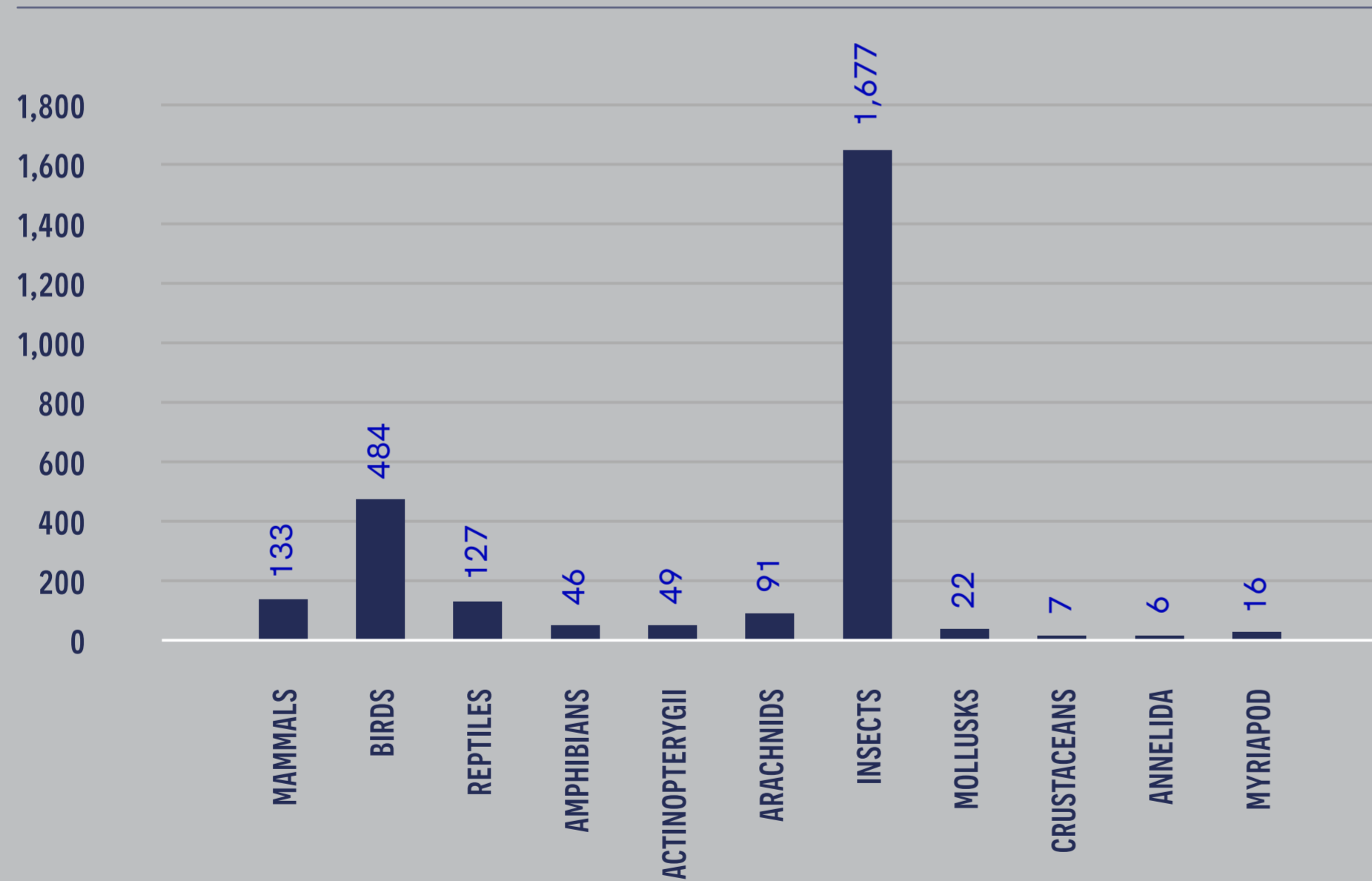
There are 2,658 species registered in the state. Insects predominate, representing 63.1% and 10.9% of the total number of insect species at the national

level, followed by birds with 18.2% and 43.4%, respectively.

Of the total number of species recorded, 13 are in danger of extinction: seven birds, four mammals and two actinopterygii.



Species registered by animal group in Querétaro (2023)



Source: Prepared by the authors with data from the National Commission for the Knowledge and Use of Biodiversity (Enciclo Vida), 2024.

Species with the most records by group in Querétaro (2023)

GROUP	TYPE OF SPECIES	NO. OF RECORDS	CATEGORY
Mammals	Malinche Mouse	1,126	Endemic
Birds	Cardinal flycatcher	3,274	Native
Reptiles	Mexican spiny lizard	456	Endemic
Amphibians	Cannon frog	272	Native
Actinopterygii	Atlantic molly	71	Native
Arachnids	Banded garden spider	199	Native
Insects	Monarch butterfly	825	Native
Mollusks	European garden snail	67	Exotic - invader
Crustaceans	Common pill-bug	20	Exotic
Annelida	Leech Helobdella socimulcensis	9	Native
Myriapod	Scolopendra tiger	12	Native

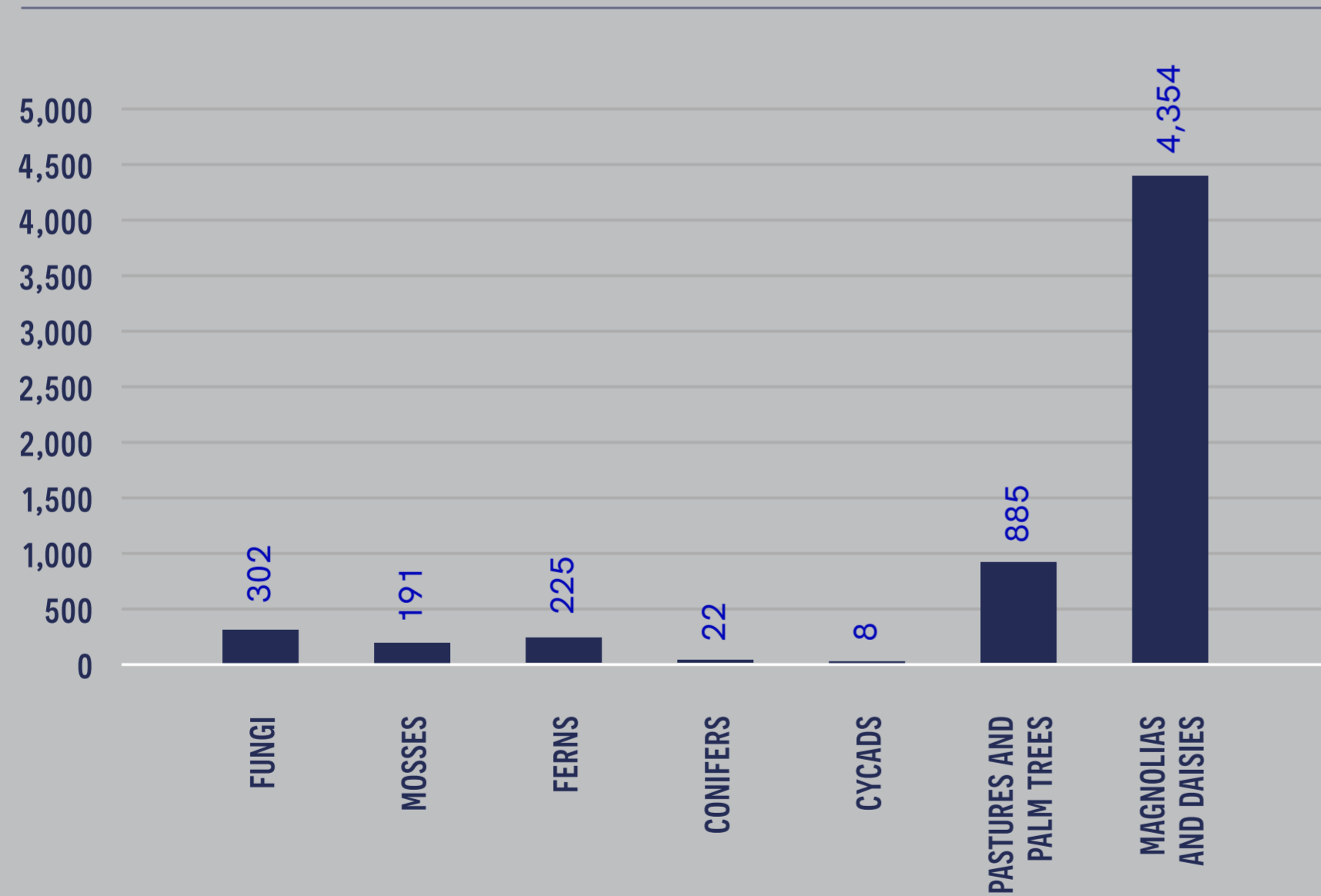
Source: Prepared by the authors with data from the National Commission for the Knowledge and Use of Biodiversity (Enciclo Vida), 2024.

## Plants and fungi

Querétaro has 5,987 species, among which magnolias and daisies stand out, representing 72.7% of the state total and 18.1% of the national total, followed by grasses and palms with 14.8% and 18%, respectively.

Of the total number of species recorded, 25 are in danger of extinction, including: 16 magnolias and daisies; three grasses and palms; two ferns; two conifers; and two cycads.

Species registered by plants and fungi group in Querétaro (2023)



Source: Prepared by the authors with data from the National Commission for the Knowledge and Use of Biodiversity (Enciclo Vida), 2024.



Species with the most records by group in Querétaro (2023)

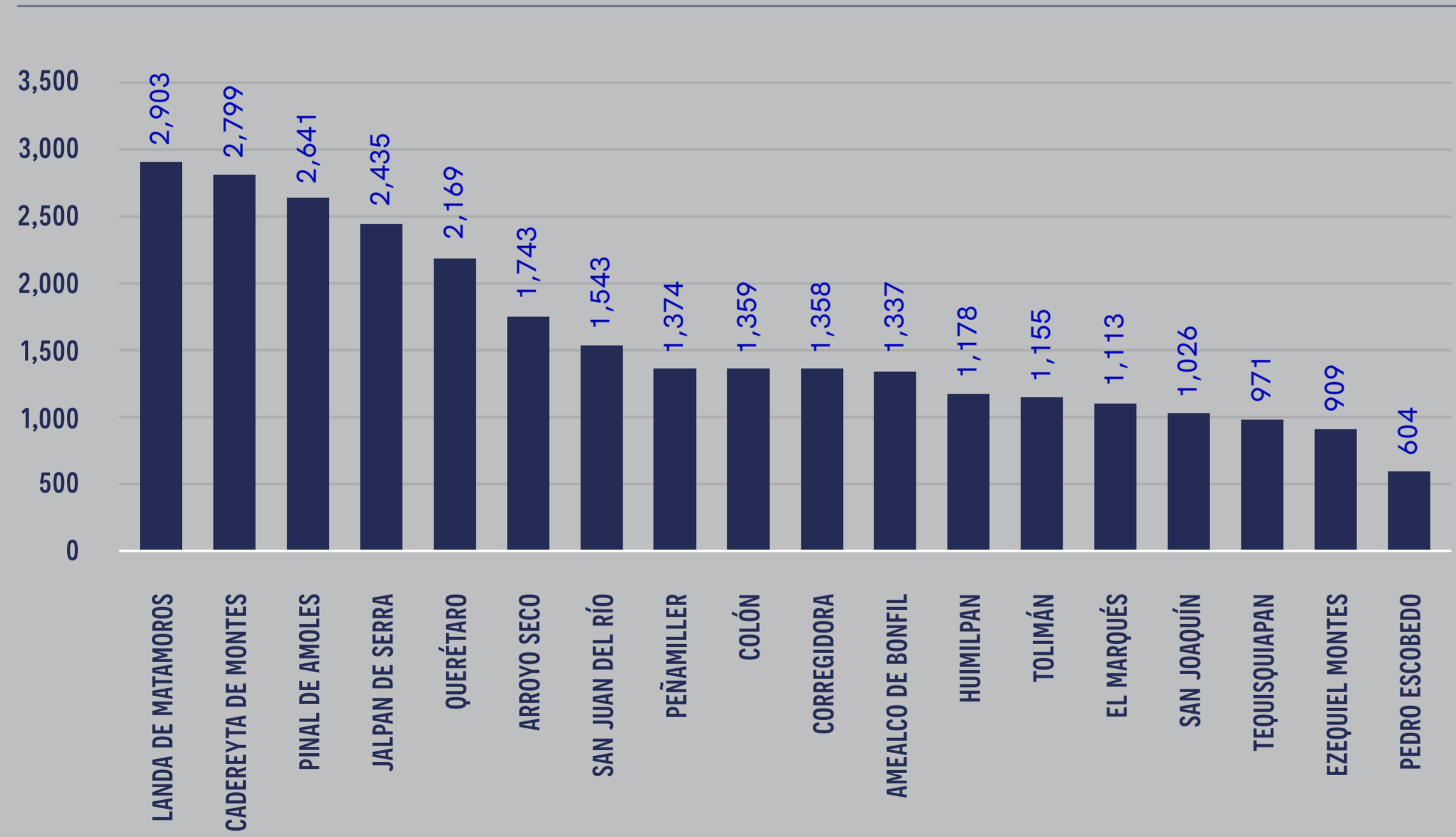
GROUP	TYPE OF SPECIES	NO. OF RECORDS	CATEGORY
Fungi	Turkey tail	43	Native
Mosses	Moss <i>Didymodon rigidulus</i>	49	Native
Ferns	Common millipede fern	90	Native
Conifers	White cypress	181	Native
Cycads	Chestnut dioon	20	Endemic
Pastures and palm trees	Corn	408	Native
Magnolias and daisies	Garambullo	634	Endemic

Source: Prepared by the authors with data from the National Commission for the Knowledge and Use of Biodiversity (Enciclo Vida), 2024.

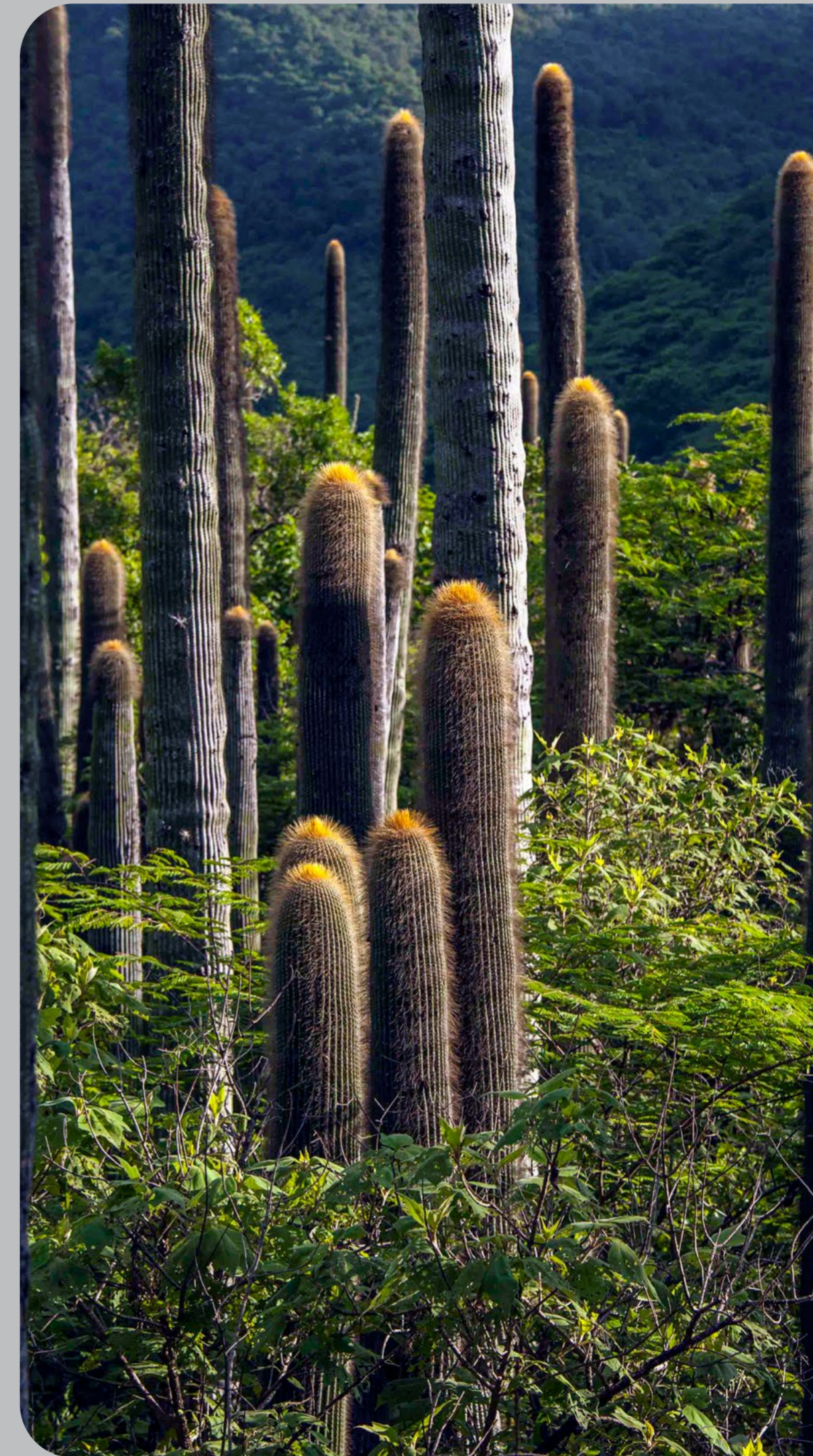


### Biodiversity by municipality

Registered species by municipality (2023)



Source: Prepared by the authors with data from the National Commission for the Knowledge and Use of Biodiversity (Enciclo Vida), 2024.







1.2

# Environment and environment management

1.2.1

## Air

Air pollution is a phenomenon that occurs through the alteration of the natural composition of the air, generated by the emission of physical, chemical or biological agents. As a result, it can generate an important health problem for the population, as well as an alteration of ecosystems and climate.

To address air pollution, the creation of public policies aimed at reducing air pollution is of great importance for climate change mitigation.

Main emission categories by pollutant (base year 2021)

POLLUTANTS <sup>1</sup>	SUBCATEGORY
PM <sub>10</sub>	Agricultural burns (21.2%)
	Domestic combustion (14.7%)
	Tillage (11.7%)
PM <sub>2.5</sub>	Agricultural burns (29.3%)
	Domestic combustion (20.4%)
	Forest fires (10.8%)
SO <sub>2</sub>	Cement and lime industry (34.7%)
	Glass production (19.4%)
	Chemical industry (13.7%)
CO	Private cars (23.7%)
	Motorbikes (19.1%)
	SUV Trucks (14.0%)
NO <sub>x</sub>	Truck tractors (23.4%)
	Private cars (12.5%)
	Biogenic (12.1%)
COV	Biogenic (29%)
	LP gas handling and distribution (22.3%)
	Industrial surface cleaning (9.1%)
NH <sub>3</sub>	Livestock emissions (83.1%)
	Domestic ammonia emissions (7.7%)
	Fertilizer application (5.4%)
CN	Truck tractors (40.2%)
	Agricultural burns (23.6%)
	Buses (8.6%)

## Pollutant emissions

Querétaro’s emissions inventory is a strategic instrument for monitoring air quality, because through knowledge of the type and quantity of pollutants emitted by the different sectors or categories, it allows the implementation and evaluation of actions and control measures.

Source: Prepared by the authors with information from the Environmental Control Division (Ministry of Sustainable Development), 2024.

Note: <sup>1</sup> PM<sub>10</sub>, airborne particles with an aerodynamic diameter of 10 µm or less; PM<sub>2.5</sub>, airborne particles with an aerodynamic diameter of less than 2.5 microns; SO<sub>2</sub>, sulfur dioxide; CO, carbon monoxide; NO<sub>x</sub>, nitrogen oxides; VOC, volatile organic compounds; NH<sub>3</sub>, ammonia; CN, cyanide.



### Atmospheric monitoring

The Ministry of Sustainable Development (SEDESU) has the Air Quality Monitoring System of the State of Queretaro (SMCAQ), which provides information on the behavior of the pollutant criteria and generates statistical data, with which decisions can be made to protect the health of the population.

The SMCAQ operates in accordance with the provisions of NOM-156-SEMARNAT-2012, and the information is reported in the official media of the State Air Quality Monitoring Center (CEMCAQ) and in the National Air Quality Information System (SINAICA); it complies with the guidelines for the publication of the Air and Health Index (ICARS) established in NOM-172-SEMARNAT-2019. There are currently six stations in operation:

### Air quality monitoring stations in Querétaro (2023)

STATION	CODE	LOCATION
Carrillo Puerto	CAP	Centro Cultural Comunitario Felipe Carrillo Puerto, Alfonso Reyes No. 500, Col. Plutarco Elías Calles, Querétaro, Qro.
Corregidora	COR	Municipality Palace and services of Corregidora, Ex Hacienda el Cerrito No. 100, Col. El Pueblito, Corregidora, Qro.
Epigmenio González	EPG	Delegación Municipal Epigmenio González, Tlálloc No. 102, Col. Desarrollo San Pablo, Querétaro, Qro.
Félix Osores	FEO	Monitoring station Félix Osores, CECYTEQ campus 5, Kiliwas s/n, Col. Cerrito Colorado, Querétaro, Qro.
Josefa Vergara	JOV	Delegación Municipal Josefa Vergara, Calle 21, No. 1000, Col. Lomas de Casa Blanca, Querétaro, Qro.
San Juan del Río	SJR	UAQ Campus San Juan del Río, Av. Río Moctezuma 249, Z/O Secc. B, San Cayetano, San Juan del Río, Qro.

Source: Prepared by the authors with information from the Environmental Control Division (Ministry of Sustainable Development), 2024.

Air quality performance during 2023 reported an average of more than 97% of validated data, exceeding the minimum established in current regulations, which is 75%. For the same year, in the Querétaro Metropolitan Zone, ozone was the pollutant with the lowest percentage of days with good air quality, with 26%.

### Air quality distribution in the Metropolitan Area of Querétaro (2023)

AIR QUALITY	O <sub>3</sub>	PM <sub>10</sub>	PM <sub>2.5</sub>	CO	SO <sub>2</sub>	NO <sub>2</sub>
Good	26%	31%	40%	100%	85%	100%
Acceptable	62%	26%	48%	0%	15%	0%
Poor	12%	36%	11%	0%	0%	0%
Very bad	0%	6%	1%	0%	0%	0%
Extremely bad	0%	1%	0%	0%	0%	0%

Source: Prepared by the authors with information from the Environmental Control Division (Ministry of Sustainable Development), 2024. Note: The acronyms of the contaminants refer to: O<sub>3</sub>, ozone; PM<sub>10</sub>, particulate matter with an aerodynamic diameter of 10 µm or less; PM<sub>2.5</sub>, particulate matter with an aerodynamic diameter of less than 2.5 microns; CO, carbon monoxide; SO<sub>2</sub>, sulfur dioxide; NO<sub>2</sub>, nitrogen dioxide.



For the San Juan del Río area, PM2.5 was the pollutant with the lowest percentage of days with good air quality with 59%.

### Air quality distribution in San Juan del río (2023)

AIR QUALITY	O <sub>3</sub>	PM <sub>10</sub>	PM <sub>2.5</sub>	CO	SO <sub>2</sub>	NO <sub>2</sub>
Good	69%	0%	59%	100%	95%	100%
Acceptable	31%	0%	29%	0%	5%	0%
Poor	0%	0%	12%	0%	0%	0%
Very bad	0%	0%	0%	0%	0%	0%
Extremely bad	0%	0%	0%	0%	0%	0%

Source: Prepared by the authors with information from the Environmental Control Division (Ministry of Sustainable Development), 2024.

Note: The acronyms of the contaminants refer to: O<sub>3</sub>, ozone; PM<sub>10</sub>, particulate matter with an aerodynamic diameter of 10 µm or less; PM<sub>2.5</sub>, particulate matter with an aerodynamic diameter of less than 2.5 microns; CO, carbon monoxide; SO<sub>2</sub>, sulfur dioxide; NO<sub>2</sub>, nitrogen dioxide.



CO and NO<sub>2</sub> pollutants remained at good air quality throughout the year in both the Querétaro Metropolitan Zone and San Juan del Río.

In the Querétaro Metropolitan Zone, NO<sub>2</sub>, CO and SO<sub>2</sub> met the maximum permissible limits (MPL) established by environmental health standards; in San Juan del Río all pollutants met them, except for PM<sub>2.5</sub>.





### Pollutant emissions by original source (year base 2021)

SOURCE	EMISSIONS (T/A) <sup>1</sup>							
	PM <sub>10</sub>	PM <sub>2.5</sub>	SO <sub>2</sub>	CO	NO <sub>x</sub>	COV	NH <sub>3</sub>	CN
Fixed	1,841.4	900.7	1,675.2	2,104.7	5,878.5	4,994.1	43.6	11.8
Of area	5,946.0	4,458.9	204.1	34,340.9	2,475.6	49,764.4	18,931.6	394.5
Natural	-	-	-	-	5,663.7	27,860.4	-	-
Mobile	1,566.5	1,137.2	317.7	113,831.8	32,881.0	13,405.7	335.3	562.9
<b>Total</b>	<b>9,354.0</b>	<b>6,496.9</b>	<b>2,197.1</b>	<b>150,277.3</b>	<b>46,898.7</b>	<b>96,024.6</b>	<b>19,310.5</b>	<b>969.2</b>

Source: Prepared by the authors with information from the Environmental Control Division (Ministry of Sustainable Development), 2024.  
Note: <sup>1</sup> Tons per year.

### Sources of pollution

- ▶ **Fixed:** These are those established for the purpose of developing industrial, commercial, service or activity operations or processes.
- ▶ **Aerial:** They are the result of diverse, numerous and dispersed anthropogenic activities that cannot be efficiently included as fixed sources, which represent a significant percentage of pollutant emissions.
- ▶ **Biogenic:** These are hydrocarbons emitted by vegetation as a result of plant growth, defense and reproduction mechanisms, as well as Volatile Organic Compounds (VOC) and nitric oxide (NO) from denitrification of soils.
- ▶ **Mobile:** They contribute significantly to emissions inventories, since all internal combustion vehicles circulating on roads generate emissions into the atmosphere.

Other emissions that should be taken into account include those generated as a consequence of urban and industrial development or those caused by forest fires.



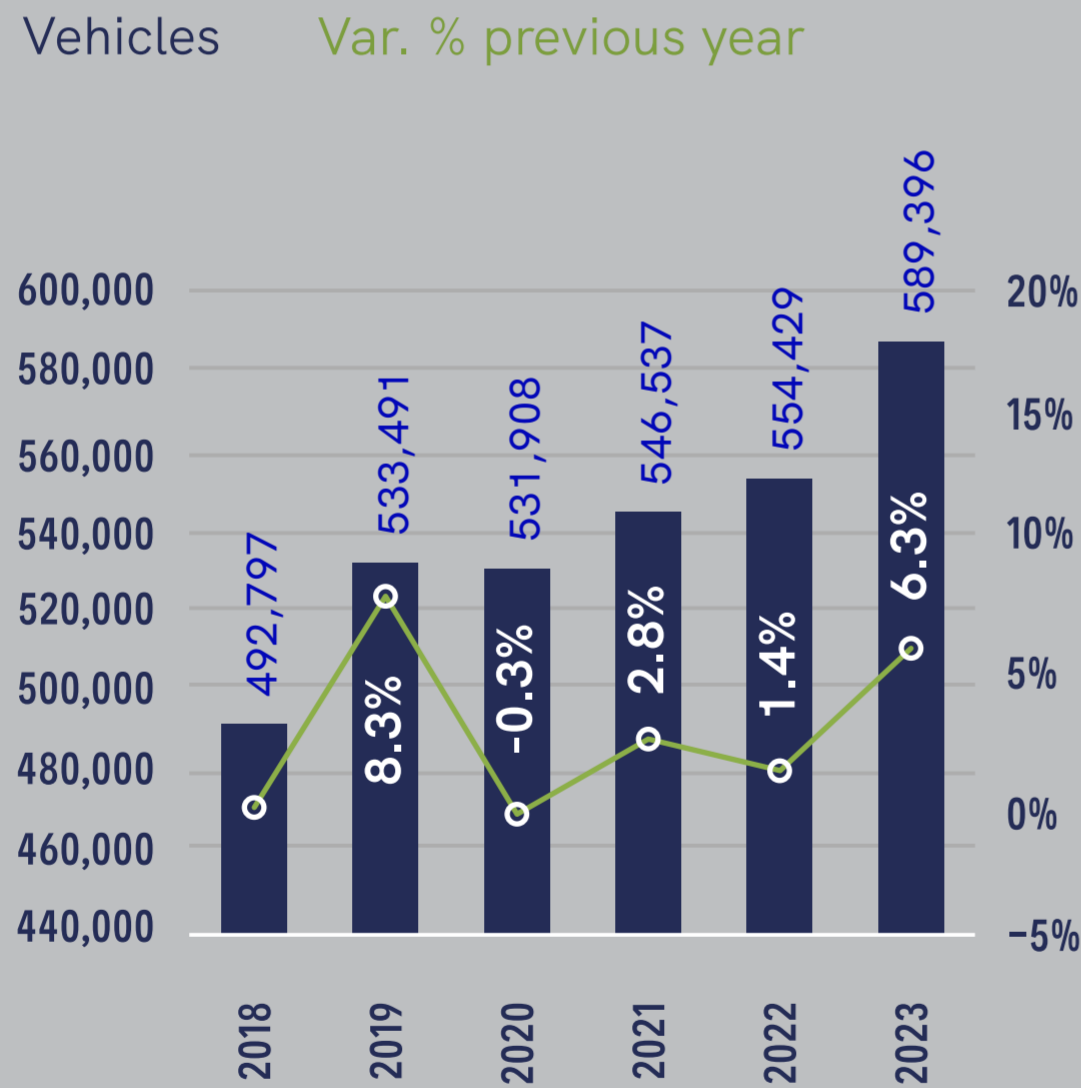


# SUSTAINABLE QUERÉTARO: ENVIRONMENT

In 2023, according to the Ministry of Planning and Finance, there were 878,865 motor vehicles in circulation in Querétaro, of which 589,396 were automobiles. The figure was 6.3% higher than that recorded in 2022.

Corregidora is the municipality with the highest density of vehicles in circulation with respect to its total population, followed by Querétaro and Huimilpan.

## Evolution of registered automobiles in circulation in Querétaro (2018-2023)



Source: Prepared by the authors with information from the Ministry of Finance, 2024.

Note: The 2018 figure for Var. % was not presented because the number of cars registered in circulation in 2017 was not available.

## Registered automobiles in circulation by municipality (2023)

MUNICIPALITY	TOTAL AUTOMOBILES	AUTOMOBILES PER 10,000 INHABITANTS
Amealco de Bonfil	9,088	1,360
Arroyo Seco	1,953	1,486
Cadereyta de Montes	8,434	1,221
Colón	7,889	1,175
Corregidora	70,931	3,337
El Marqués	43,190	1,864
Ezequiel Montes	7,325	1,623
Huimilpan	7,824	2,126
Jalpan de Serra	3,655	1,337
Landa de Matamoros	1,868	994
Pedro Escobedo	11,207	1,448
Peñamiller	1,927	1,007
Pinal de Amoles	1,585	579
Querétaro	337,220	3,212
San Joaquín	955	1,142
San Juan del Río	58,690	1,971
Tequisquiapan	12,592	1,744
Tolimán	3,063	1,097
<b>Total</b>	<b>589,396</b>	<b>2,489</b>

Source: Prepared by the authors with information from the Ministry of Finance, 2024.





## Prevention and control of atmospheric pollution

The Ministry of Sustainable Development, through the Undersecretary of the Environment, prevents and controls air pollution through the State Vehicle Verification Program, the support of various training programs and permits.

During 2023, 554,172 vehicles were verified in the 44 vehicle verification centers distributed in 10 municipalities in the state of Querétaro.

In order to ensure that industrial establishments properly report their polluting emissions, a training course was given, in which 553 participants, specifically 256 companies, registered to participate.



Likewise, through the Online Procedures Platform, 802 Annual Operation Cards (COA) were entered in 2023, a document through which the report for the registration of pollutant transfer emissions is

submitted by individuals or organizations engaged in industrial, commercial, agricultural or service production under state jurisdiction that have sources of air pollutant emissions.



### 1.2.2

## Water

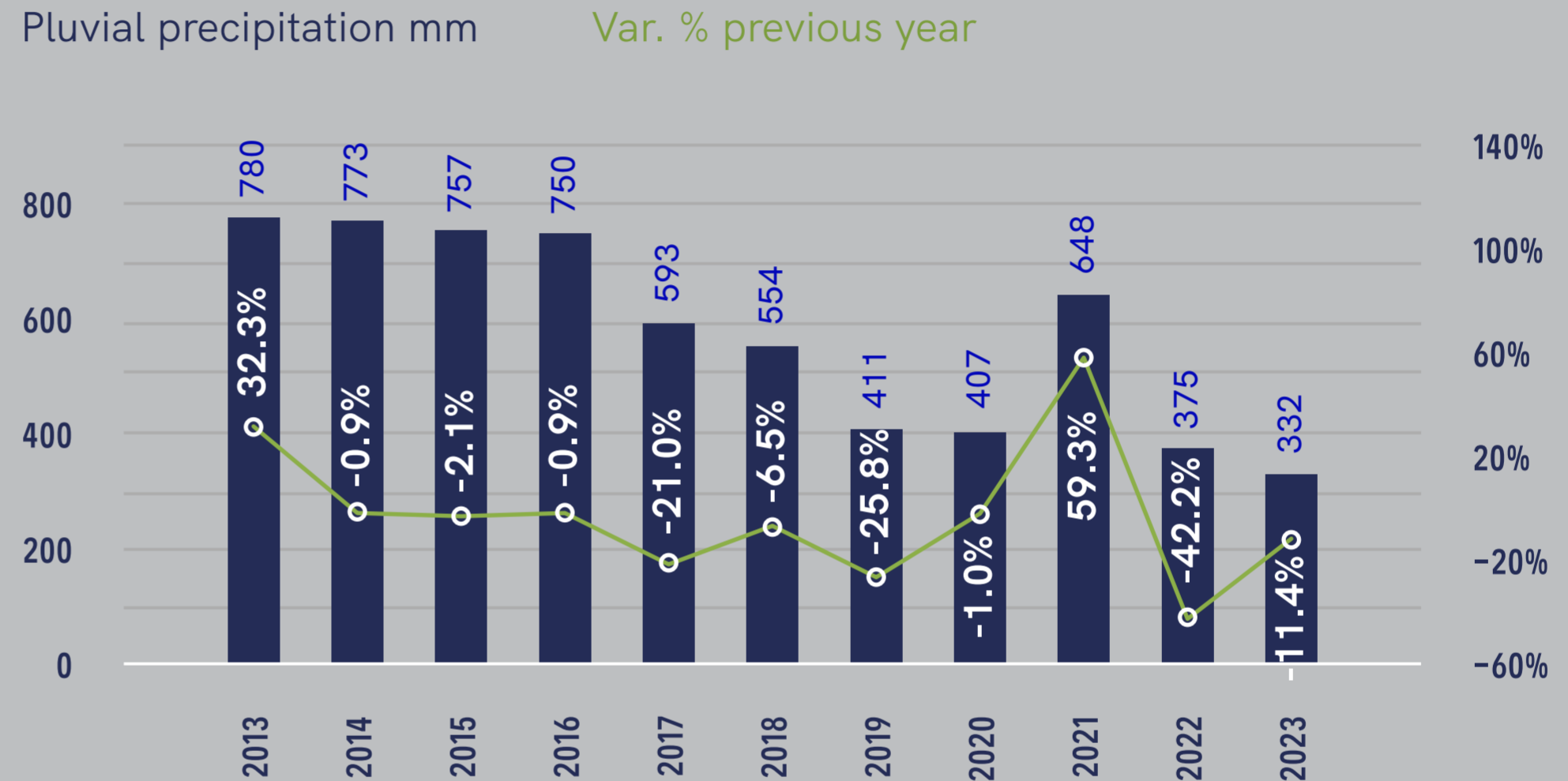
In Querétaro, as well as throughout the country, water stands out as a fundamental element that affects various aspects of economic, social and environmental life. According to the report of the Bajo Tierra organization, between 2019 and 2022, the entity ranked sixth nationally in water stress, being one of the four regions with the highest hydrological vulnerability.

The State Water Commission (CEA) provides efficient, sufficient and quality water supply to the state's population, which is of great relevance due to the constant population growth.

### Pluvial precipitation

Annual precipitation in Mexico varies according to the region and the specific climatic conditions of each year. In 2023, at the national level it reported 589.9 mm, compared to 2022, rainfall decreased by 153.5 mm, equivalent to -20.6%.

### Evolution of annual precipitation in Querétaro (2013-2023)



Source: Prepared by the authors with data from the National Water Commission (Monthly Summary of Temperatures and Rainfalls), 2024. Note: Figures are expressed in thousands (mm).

Among the states with the highest precipitation levels in 2023 are: Tabasco (1,820.7 mm); Chiapas (1,701.4 mm); Colima (1,371.4 mm); Veracruz (1,269.8 mm); and Morelos (1,142.4 mm).

By 2023, Querétaro's annual precipitation was 332.2 mm per year, making it one of the states

with the lowest precipitation levels at the national level. The figure reported for this year is the lowest since 1999, when rainfall was 251.2 mm.

The months with the highest rainfall were July and August, with 66.4 mm and 71.8 mm, respectively.



### Water treatment

Due to the state’s hydrological vulnerability, water treatment in the state has become even more important, since it allows its reuse in productive activities that traditionally consume drinking water and, at the same time, contributes to protecting the environment.

Therefore, the State Water Commission (CEA) has set important objectives in this area. Throughout 2023, investments were made in projects to expand wastewater treatment plants in the municipalities of Amealco and San Joaquín; sewage and sanitation works, mainly in the Metropolitan Area of the capital of Querétaro, , as well as maintenance of various treatment plants throughout the state.

The Commission collects used water from all municipalities, except San Juan del Río, through the drainage system and takes it to treatment plants where it is processed to be reused or returned to its natural condition.

In 2023 CEA operated 42 treatment plants, through which it treated an annual volume of 32,537,412.54 m<sup>3</sup>, with 23,607,176.5 m<sup>3</sup> from the Metropolitan Area and 8,930,236.1 m<sup>3</sup> from the interior of the state.

### Inventory of wastewater treatment plants CEA Querétaro (2023)

MUNICIPALITY	NO. OF PLANTS	INSTALLED CAPACITY (LPS)
Amealco de Bonfil	2	57
Arroyo Seco	1	1
Cadereyta de Montes	2	24
Colón	4	27.5
Corregidora	3	448
El Marqués	6	163
Huimilpan	6	29
Jalpan de Serra	2	21
Landa de Matamoros	3	5.5
Pedro Escobedo	1	15
Pinal de Amoles	1	4
Querétaro	6	964.4
San Joaquín	1	6
Tequisquiapan	2	65
Tolimán	2	10.5
<b>Total</b>	<b>42</b>	<b>1,840.9</b>

Source: Prepared by the State Water Commission, 2024. Note: lps=liters per second







1.2.3

Energy

Energy Agency of the State of Querétaro

Created on October 1, 2021, it is a decentralized agency of the State Public Administration with technical, operational and managerial autonomy. Effective as of January 1, 2022.

It is committed to strengthening and expanding infrastructure through new plans, programs and public and private investment projects for the consolidation of the energy sector in Querétaro.

Among its main objectives are the following:

- ▶ To meet the state’s electricity demand needs.
- ▶ To develop projects to strengthen the transmission and distribution infrastructure.
- ▶ To guarantee electricity sufficiency for investors for the next six years.

Energy landscape in Mexico

Power generation

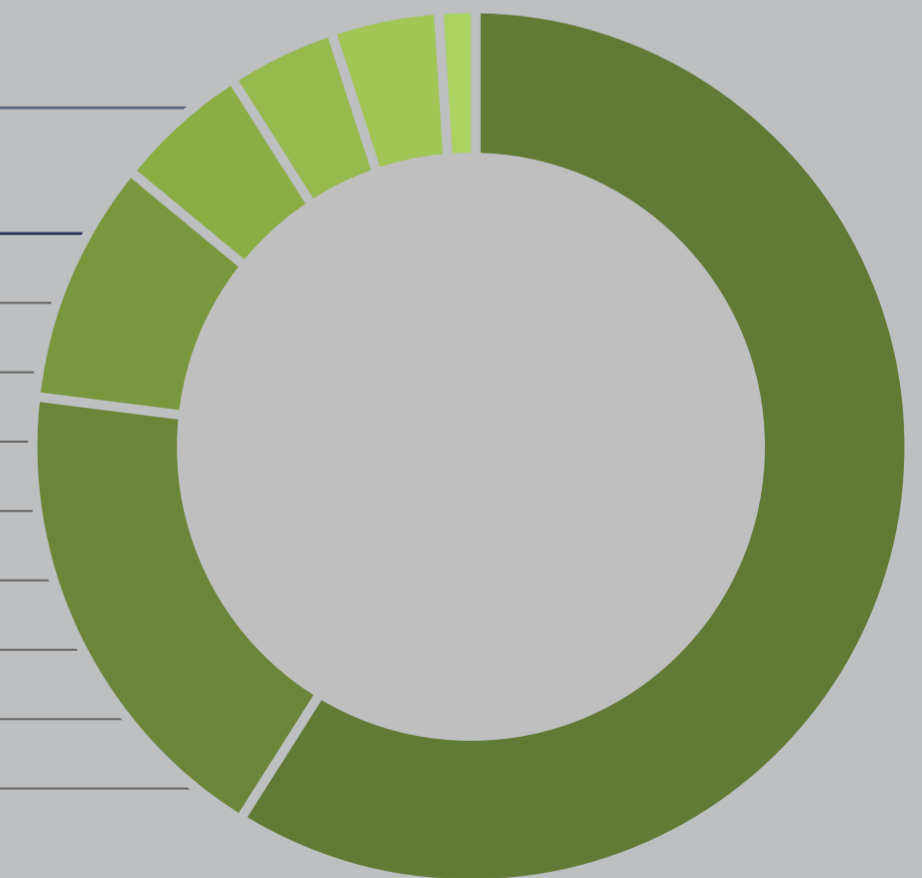
According to the National Energy Control Centers’s (CENACE) Statistics on Intermittent and Firm Aggregate Cleared Energy Generated (MWh) in the National Electric System (SEN), it is estimated that Mexico provides electric energy service to more than 125 million Mexicans. During 2023, the country generated 346,329.3 Giga Watts hour (GWh) of energy.

More than half of the energy generated in 2023 was through combined cycle, followed by renewables.

Energy generation through renewable sources was distributed as follows: 32.5% wind; 32.3% hydroelectric; 28.6% photovoltaic; 6.5% geothermoelectric; and 0.2% biomass.

Energy generation by source in Mexico (2023)

POWER GENERATION SOURCE	GWh	DISTRIBUTION
Combined cycle	203,623.8	58.8%
Renewable energy	63,733	18.4%
Conventional thermal	31,202.7	9%
Turbo gas	17,851.6	5.2%
Carboelectric	14,234.2	4.1%
Nucleoelectric	12,043.4	3.5%
Internal combustion	3,640.7	1.1%
<b>Total</b>	<b>346,329.4</b>	<b>100%</b>



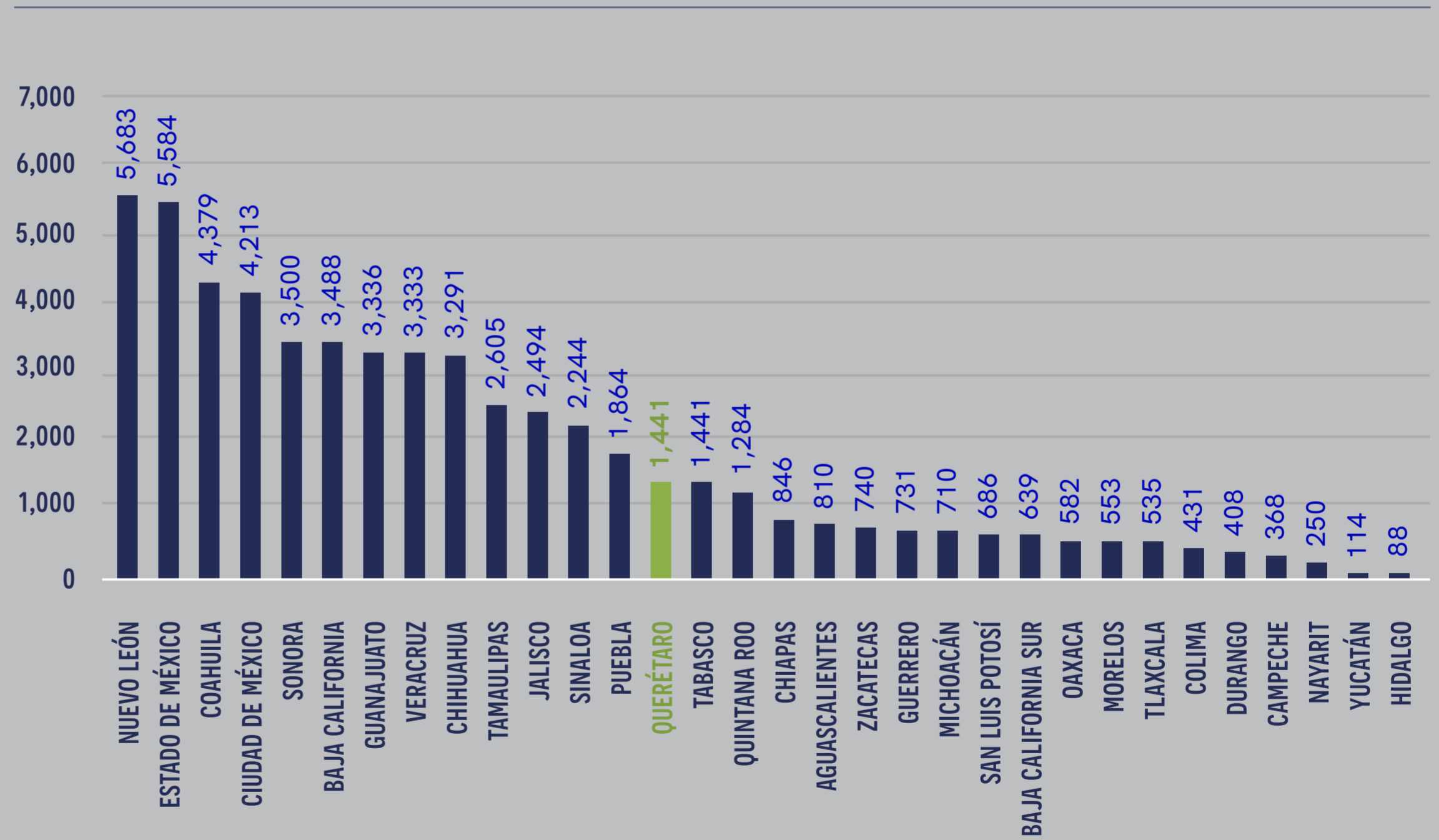
Source: Prepared by the authors from information of the Energy Agency in the state of Querétaro (National Electric System), 2024.



### Energy demand

In 2022, the states that demanded the highest volume of energy were: Nuevo Leon, the Estado de México and Coahuila together accounted for 26.7% of total demand. Querétaro ranked 15th with 1,411 MW, equivalent to 2.5% of the total.

Electricity demand by state (2022)



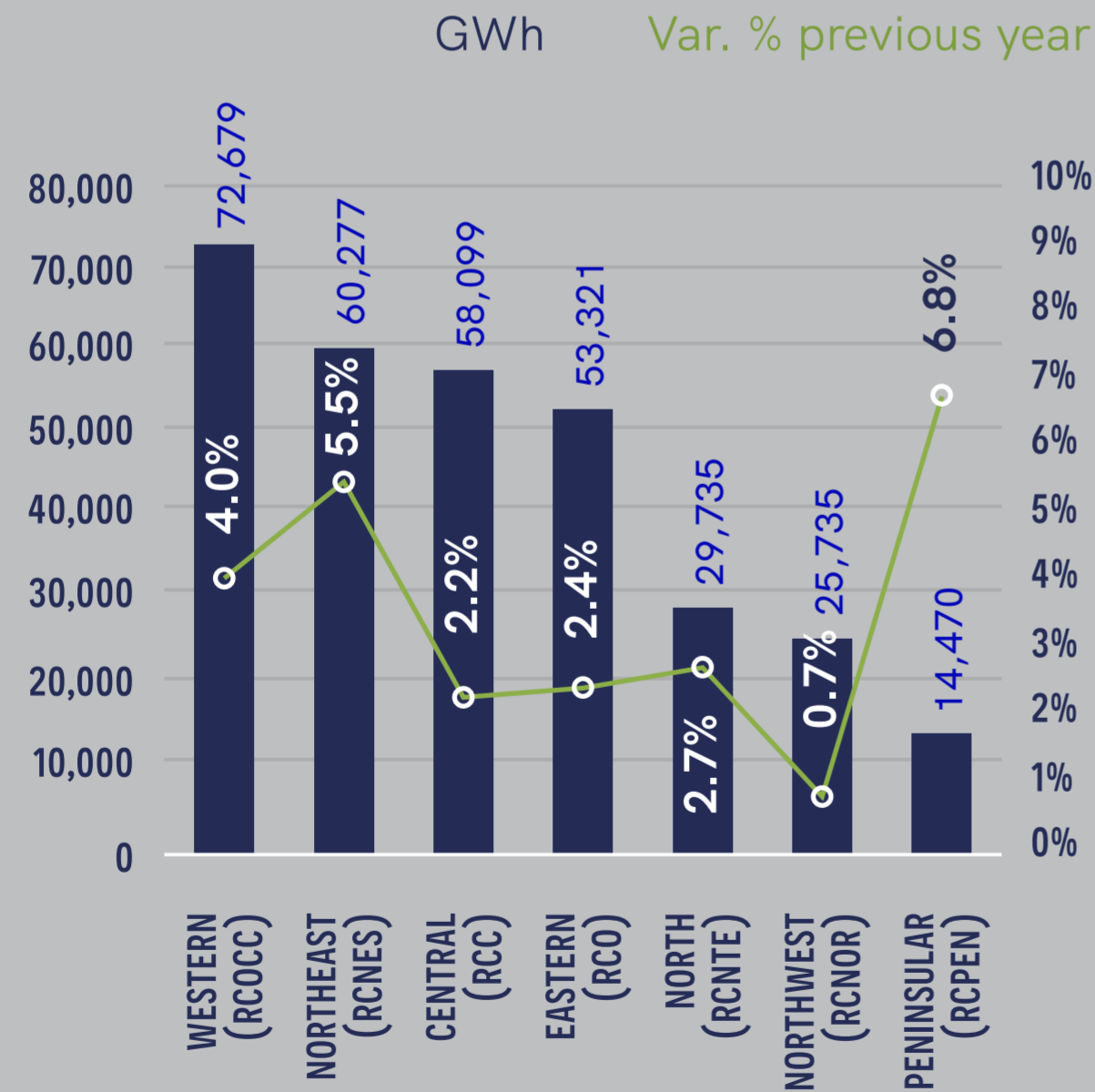
Source: Prepared by the authors with information of the Energy Agency in the state of Querétaro (National Electric System), 2024. Note: Figures are expressed in MW.



## National consumption

During 2022, according to the control regions, the country reported energy consumption of 314,316 GWh, with the Western Region having the highest consumption, followed by the Northeast Region and the Central Region, in which Querétaro is located.

### Energy consumption by Control Regions (2022)



Source: Prepared by the Energy Agency in the state of Querétaro with data from the National Electric System, 2024.

Note: Figures are expressed in GWh



## Energy outlook in Querétaro

### Electric infrastructure in Querétaro

#### Transmission line capacity

Throughout Querétaro, 322 km of power transmission lines run at a voltage of 400 kV, approximately 191 km of lines at a voltage of 230 kV and 680 km of lines at a voltage of 115 kV.

#### Substation capacity

There are five 230 kV to 115 kV transformation substations in the state through 230 kV lines, which operate to meet the state's own demand. This allows estimating a total capacity of 1,325 MVA of electrical energy.



### Power generation

During 2022, the installed capacity interconnected to the grid by Querétaro was 591 MW, coming from the combined cycle technology in the El Sauz power plant, which is in the process of expanding generation, thus increasing from the aforementioned figure to 897.5 MW.

The wind farm in the municipality of Huimilpan, with an installed capacity of 30 MW, is also in operation.

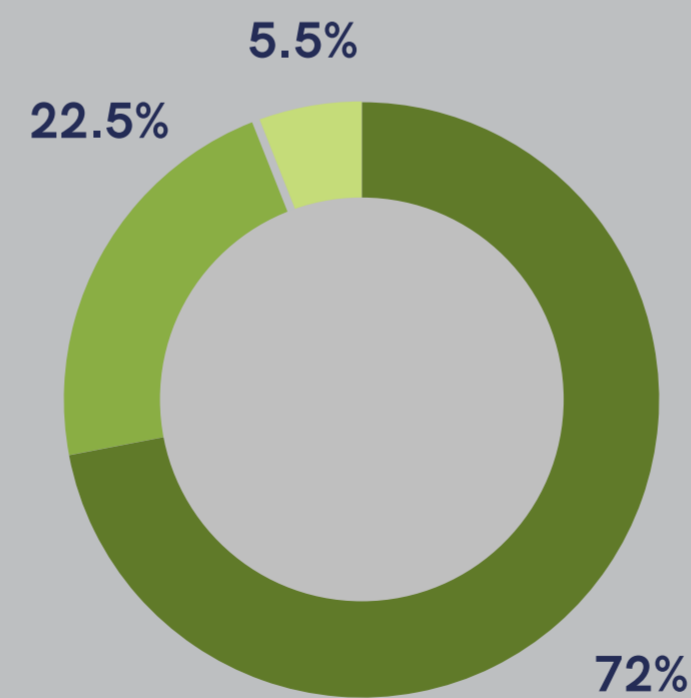
### Energy demand

Meeting the state's demand for electricity is one of the most important challenges facing the state, since securing this energy supply will increase the state's competitiveness, attract new investments and promote economic growth.

In 2022, the maximum demand in the entity was 1,307 MW, which is lower than the entity's installed capacity of 1,325 MW. This demand is largely represented by the industrial sector.

### Energy demand distribution by sector in Querétaro (2022)

- Industrial
- Residential and Utilities
- Commercial



Source: Prepared by the authors with information from the Energy Agency of the State of Querétaro, 2024.





## Renewable energy in Querétaro

Currently, the use of non-renewable resources to generate electricity produces a high amount of polluting gases, which is why the use of renewable energies is an important alternative to deal with it. In addition to the latter, it would allow an increase in energy generation, satisfying the demand in an optimal way.

## Photovoltaic energy

The Mexican territory has a location with the potential to take advantage of photovoltaic energy compared to other countries. Its importance lies in the fact that all states can benefit from the generation of this type of energy, since it is not limited to a specific area or condition.

## Photovoltaic energy potential by municipality in Querétaro

MUNICIPALITY	PEAK SOLAR HOURS	DAILY PHOTOVOLTAIC ENERGY PRODUCTION (MWh)	YEARLY PHOTOVOLTAIC ENERGY PRODUCTION (MWh)	ANNUAL IRRADIANCE (KWh/M <sup>2</sup> )
Amealco de Bonfil	6	2.2	801.9	2,241.6
Arroyo Seco	5.3	2	716.5	2,031.7
Cadereyta de Montes	5.8	2.2	808.3	2,285.3
Colón	6.1	2.2	804.6	2,284.2
Corregidora	6.1	2.3	835.5	2,359.5
El Marqués	6.1	2.2	818.1	2,323.5
Ezequiel Montes	5.8	2.2	809.8	2,301.2
Huimilpan	6	2.2	805.5	2,281.7
Jalpan de Serra	5.3	1.9	700.6	1,999.7
Landa de Matamoros	5.3	1.9	703.6	1,987.9
Pedro Escobedo	6.1	2.2	816.6	2,329.6
Peñamiller	5.3	2.2	794.6	2,261.9
Pinal de Amoles	5.3	2	744.9	2,065.6
Querétaro	6.1	2.3	832.6	2,379
San Joaquín	5.8	2	743.1	2,067.4
San Juan del Río	6.1	2.2	810.1	2,307.8
Tequisquiapan	5.8	2.2	810.3	2,308.8
Tolimán	5.8	2.2	805.7	2,298.5

Source: Prepared by the Energy Agency of the State of Querétaro, 2024.



### Bioenergy

Obtained by transforming biomass into biofuels, it is attractive because it is renewable and has a lower environmental impact than fossil fuels.

In Querétaro, there are two biogas energy production plants with a capacity of 2.75 MW and 1.05 MW, corresponding to the municipal sanitary landfill and the San Pedro Mártir wastewater treatment plant, respectively.



### Wind energy

In Mexico, there are areas with wind speed regimes that reach up to 35 km/h. In the municipalities of the state, wind speeds in the range of 10.8 km/h to 7 km/h were recorded. These speeds allow

wind power systems to be used for stand-alone and grid-connected systems. The wind farm in the municipality of Huimilpan is currently operating with a net capacity of 30 MW.



1.2.4

### Ecological Management (EO)

The Ecological Land Management of the State of Querétaro is an environmental policy instrument that consists of planning and applying measures aimed at regulating, inducing and evaluating land use and programming the management of natural resources and productive activities, in order to achieve environmental protection, as well as the preservation and sustainable use of natural resources, based on the analysis of deterioration trends, their possible recovery and their potential for use.

### Ecological Management Programs

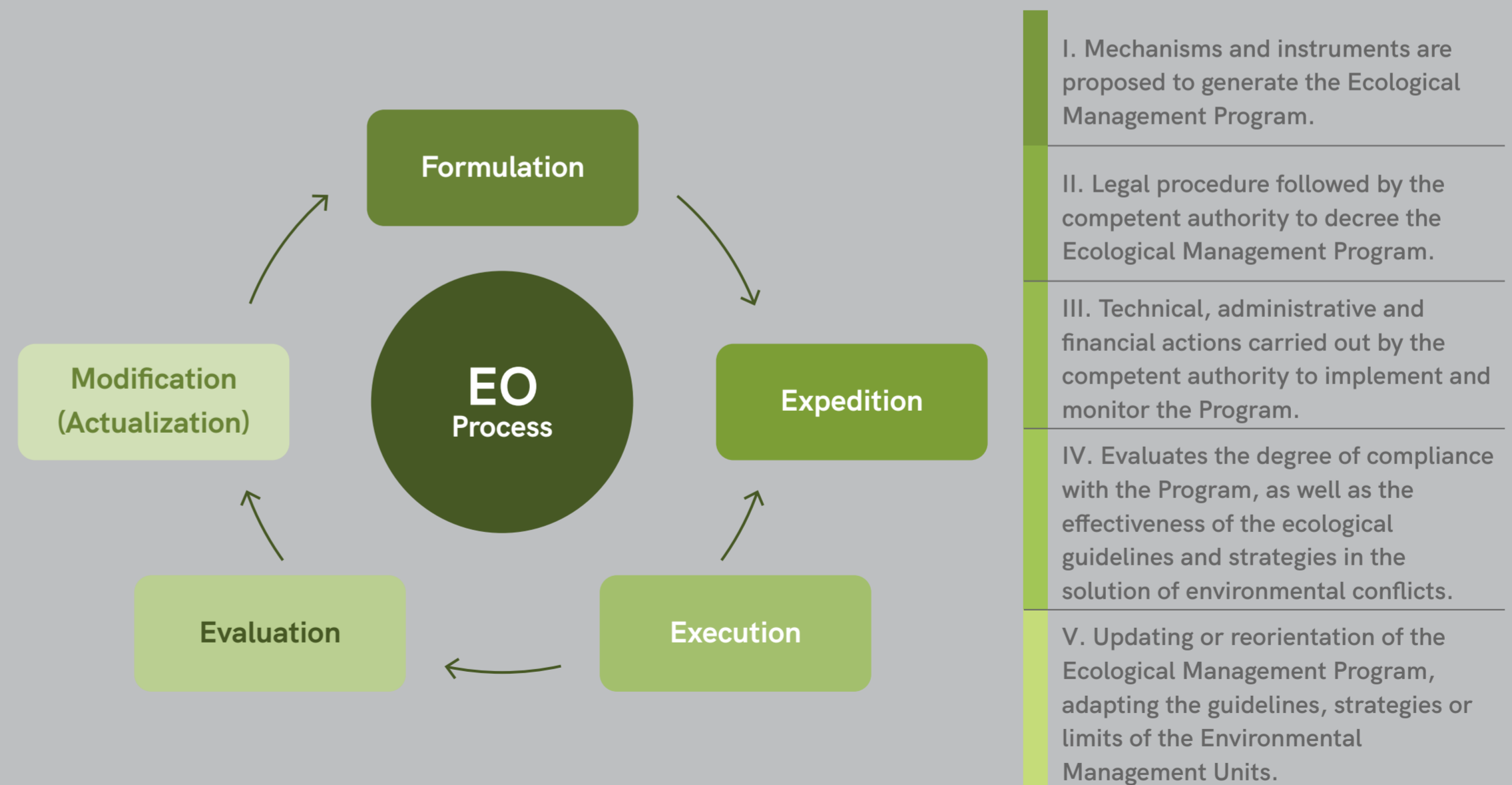
The ecological management of the state's territory is carried out through the ecological management programs, which will be:

- ▶ **Regional:** When they cover the entire territory or a part involving more than one municipality of the state territory.
- ▶ **Local:** When it covers part or all of the territory of a municipality.

### Ecological Management Process

It is the set of actions and activities carried out in stages, for the generation of the ecological management program, which consist of:

#### Ecological Management stages (2023)



Source: Prepared by the Directorate of Environmental Planning (Secretariat of Sustainable Development), 2024.



## General Ecological Management Program in the Territory (POEGT)

With publication in the Official Gazette of the Federation on September 7, 2012, the Federal Government through the Ministry of the Environment and Natural Resources (SEMARNAT) issued the POEGT, regionalizing the national territory into Biophysical Environmental Units (UAB), which are integrated based on the main environmental factors: climate, relief, vegetation and soil.

Ten ecological guidelines, 44 general strategies and four environmental policies were established to manage the UABs:

- ▶ Preservation
- ▶ Protection
- ▶ Restoration
- ▶ Sustainable use



### Biophysical Environmental Units in which Querétaro is located

REGION KEY	UAB <sup>1</sup>	UAB NAME <sup>1</sup>	DEVELOPMENT DRIVERS	DEVELOPMENTAL ADJUVANTS	DEVELOPMENT PARTNERS	OTHER INTERESTING SECTORS	ENVIRONMENTAL POLICIES	PRIORITY LEVEL OF ATTENTION
5.17	30	"Karst Huasteco Norte"	Forestry	Mining and preservation of flora and fauna	Agriculture and livestock	PEMEX and indigenous peoples	Preservation, sustainable use and restoration	Low
	44	Sierras and Plains of Northern Guanajuato	Agriculture and preservation of flora and fauna	Livestock and mining		Indigenous peoples	Restoration and sustainable use	High
18.8	52	Plains of Northern Guanajuato	Agriculture and preservation of flora and fauna	Agriculture, social development, livestock and mining	Population	PEMEX and indigenous peoples	Restoration and sustainable use	Medium

Sources: Prepared by the Environmental Planning Directorate (SEDESU, General Ecological Management Program in the Territory 2012), 2024.  
<sup>1</sup>Biophysical Environmental Unit.





## Regional Ecological Management Program in the State of Querétaro (POEREQ)

Published in the Official Gazette of the Government of the State of Querétaro “La Sombra de Arteaga” on September 5, 2022 and registered in the Public Registry of Property under registry folio 00000100/0003 on October 20, 2022.

This is based on compliance with the POEGT issued by SEMARNAT; the POEREQ published in 2009; the integration of the Natural Protected Areas issued in the state; the Environmental Management Units of the Local Ecological Management Programs (POEL) issued by the state's municipalities; and the provisions of the State Land Use and Urban Development Program (PEOTDU).



The POEREQ regionalizes the territory into 327 Environmental Management Units (UGA), each of which has an environmental policy, guidelines and ecological strategies for the protection, conservation, restoration and sustainable use of

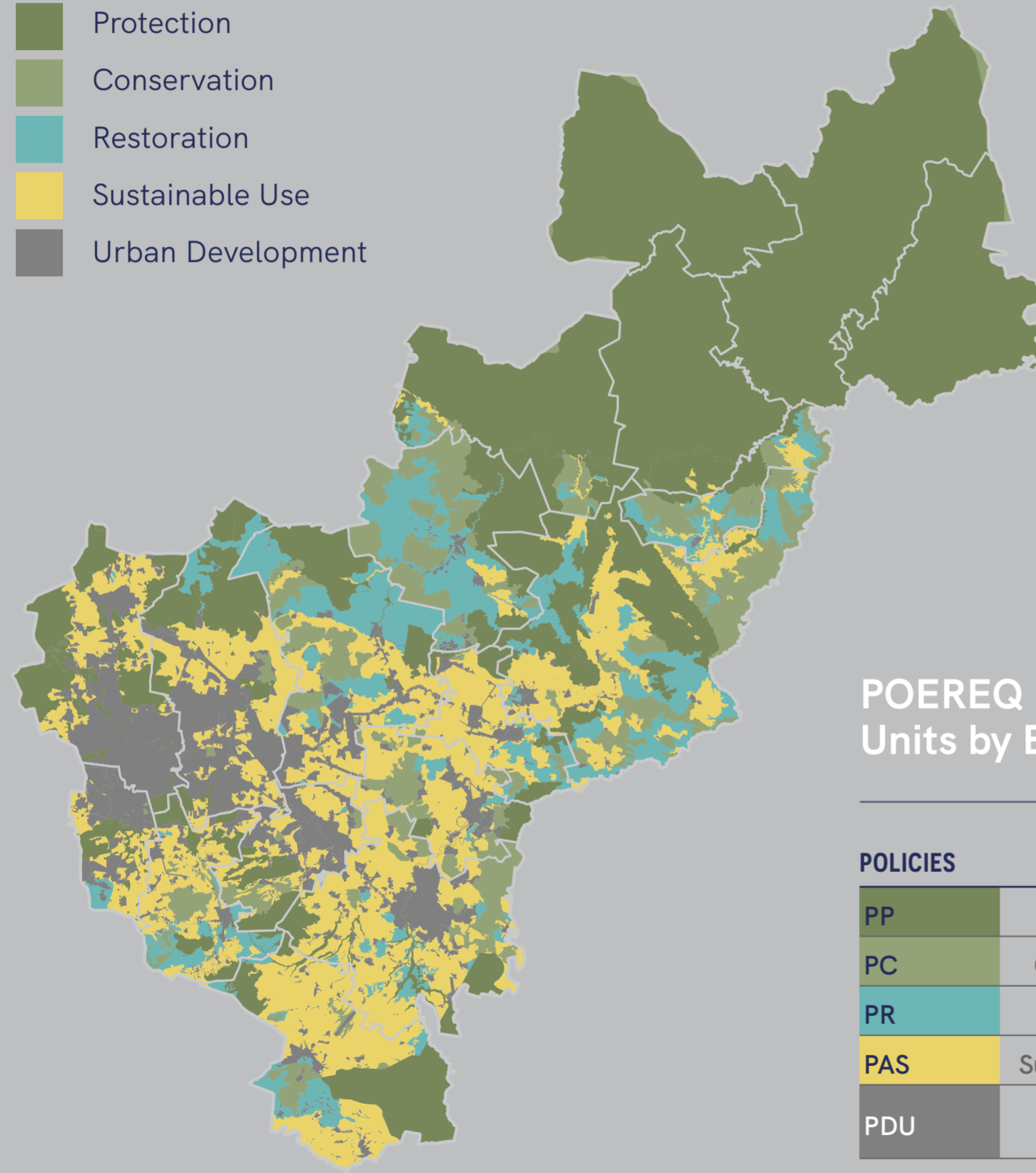
natural resources applicable to this regionalization, as well as environmental regulation criteria to ensure sustainable development in the use of the territory and human settlements.



### Distribution of CGU's in Querétaro

#### Policies

- Protection
- Conservation
- Restoration
- Sustainable Use
- Urban Development



Source: Prepared by the Directorate of Environmental Planning (Secretariat of Sustainable Development), 2024.

### POEREQ Environmental Management Units by Environmental Policy

POLICIES		CGU TOTAL	% OF TERRITORY
PP	Protection	108	49.3%
PC	Conservation	86	10.1%
PR	Restoration	53	9.4%
PAS	Sustainable Use	51	20.7%
PDU	Urban Development	29	10.5%
<b>Total</b>		<b>327</b>	<b>100%</b>

Source: Prepared by the Directorate of Environmental Planning (Secretariat of Sustainable Development), 2024.

### POEREQ Objectives

- 1** To regulate, outside of population centers, the activities of the territory with the purpose of protecting, conserving and preserving the environment; restoring and making sustainable use of natural resources.
- 2** To strengthen and establish Natural Protected Areas and other conservation instruments.
- 3** To restore disturbed ecosystems and degraded areas.
- 4** To conserve productive areas for agricultural, livestock and forestry activities.
- 5** To establish ecological regulation criteria for the protection, conservation, restoration and sustainable use of natural resources within the ecologically ordered territory and population centers

Querétaro is an orderly and balanced state in its development, which, based on the protection and conservation of its natural and cultural heritage, has improved the well-being of its inhabitants. Its urban development is comprehensive, equitable and efficient, centered on the people who live there, respecting the natural environment of the territory and the needs of its regions, maintaining a sufficient relationship between the natural resource base, green areas and the population.



## Local Ecological Management Programs (POEL)

POELs are issued by local municipalities, whose dimensions allow them to define local strategies to address environmental problems and conflicts within their territory.

### POEL relation in Querétaro

MUNICIPALITY	APPROVAL	GAZETTE   SOMBRA DE ARTEAGA
Regional	23/08/22	05/09/22
Querétaro	29/04/14	13/05/2014   16/05/2014
Corregidora	14/12/16	01/02/2017   10/02/2017
Huimilpan	28/03/18	31/03/2018   12/04/2018
El Marqués	11/04/18	20/04/2018   01/06/2018
Pedro Escobedo	12/01/17	Enero 2017   17/02/2017
Colón	08/02/18	15/02/2018   23/02/2018
Tequisquiapan	28/09/15	30/09/2015   30/10/2015
Amealco	22/04/16	25/04/2016   24/06/2016
San Juan del Río	13/10/17	16/02/2018   12/01/2018
Cadereyta	14/11/17	09/05/2018
San Joaquín	06/09/18	01/09/2018   21/09/2018
Tolimán	13/09/18	28/09/2018   25/09/2018
Ezequiel Montes	16/01/20	31/03/20

Source: Prepared by the Directorate of Environmental Planning (Secretariat of Sustainable Development), 2024.

As of 2023, there are 13 POELs in force in the municipalities of Amealco, Cadereyta, Colón, Corregidora, El Marqués, Ezequiel Montes, Huimilpan, Pedro Escobedo, Querétaro, San Joaquín, San Juan del Río, Tequisquiapan and Tolimán. This ecological planning covers 67.2% of the state territory where 95.5% of the total population lives. The rest of the districts are part of Natural Protected Areas (NPA).

Querétaro is the first state in Mexico to have environmental instruments for the planning and management of natural resources and land use and destination, with a focus on sustainability.

## Linking Ecological Management and Urban Development

In compliance with articles 69 and 93 of the Environmental Code of the State of Querétaro (CAEQ), the updates of the municipal urban development programs of San Juan del Río and Tequisquiapan have been carried out in

compliance with the observance and linkage of the local and regional ecological management programs; they included works, actions and strategies to mitigate and compensate for the environmental impacts generated by development; they have also established mechanisms to ensure compliance with the environmental criteria of the environmental regulation of human settlements.

In compliance with articles 10 section XVII, 69 and 95 of the CAEQ, the evaluation of the congruence of the regional ecological planning, in the control and surveillance of land use, is carried out through the environmental report issued by SEDESU and the environmental opinion as support in the federal procedures.



### 1.2.5

## Natural Protected Areas (NPA)

These are state zones that have been subject to the protection regime through a decree to conserve natural environments, safeguard biodiversity, make sustainable use of natural resources, preserve and improve the quality of the environment and the environmental benefits provided by ecosystems.

### NPA in the state

In Querétaro there are areas that, due to their physical and biological importance, the environmental services they provide or the special interest of the state, should be subject to preservation, conservation or restoration programs.



For this purpose, protection declarations are issued to indicate that an area is under a protection regime.

In 2023, the state had 16 PNAs within 13 of the 18 municipalities, of which five are federal, six

state and five municipal. The decreed areas total 439,772.2 hectares, representing 38% of the state's surface area.



## Natural Protected Areas in the state of Querétaro

	ORDER	PROTECTED NATURAL AREA	CATEGORY	MUNICIPALITIES	SURFACE (HECTARES)	DISTRIBUTION OF THE STATE'S SURFACE AREA
Federal order		Cerro de las Campanas	National Park	Querétaro	3.8	0%
		El Cimatario	National Park	Corregidora Huimilpan Querétaro	2,447.9	0.2%
		Sierra Gorda	Biosphere Reserve	Arroyo Seco Jalpan de Serra Landa de Matamoros Peñamiller Pinal de Amoles	383,567.4	32.8%
		Forestry Protected Area	Natural Resources Protection Area	Amealco de Bonfil San Juan del Río	23,255.0	2%
		Peña Colorada	Natural Resources Protection Area	Querétaro and El Marqués	4,843.6	0.4%
State order		Mario Molina Pasquel "El Pinalito"	State Reserve	El Marqués	1,592.5	0.1%
		El Tángano	Zone Subject to Ecological Conservation	El Marqués Huimilpan Querétaro	717.7	0.1%
		Benito Juárez river bank	Population Center Ecological Preservation Zone with Intraurban Park Subcategory	Querétaro	27.6	0%
		Tángano II	Ecological Reserve Zone	El Marqués Huimilpan	137.6	0.01%
		Peña de Bernal	Protected Landscape	Ezequiel Montes Tolimán	263.9	0.02%
		El Batán	Ecological Reserve Zone	Corregidora	3,341.6	0.3%
Municipal order		Western Zone of Microbasins	Zone Subject to Ecological Conservation		12,234.1	1.1%
		Jurica Poniente	Population Center Ecological Preservation Zone with Intraurban Park Subcategory		224.1	0.02%
		Cañada Juriquilla	Population Center Ecological Preservation Zone with Intraurban Park Subcategory	Querétaro	22.1	0%
		Sierra de El Raspiño	Population Center Ecological Preservation Zone with Intraurban Park Subcategory		4,104.2	0.4%
		Cerro Grande	Population Center Ecological Preservation Zone with Intraurban Park Subcategory		2,989.2	0.3%

Prepared by the authors with data from the Environmental Planning Department (Ministry of Sustainable Development), 2024.



### Projects supported for Conservation and Natural Protected Areas (2023)

PROJECT NAME	BENEFICIARIES
Weaving El Zamorano Stage Carrizal	Colon municipality

Source: Prepared by the authors with information from the Environmental Planning Department (Ministry of Sustainable Development), 2024.

## NPA management programs

These are guiding planning and regulatory instruments that establish activities, actions and basic guidelines for the management and administration of NPAs.

### Management programs of Natural Protected Areas in the state of Querétaro

REGIME	PROTECTED NATURAL AREA	PUBLICATION DATE	JUSTIFICATION
State	Benito Juárez river bank	Summary-4 June 2010	The vegetation cover and the body of water present in the NPA help regulate the temperature in the north of the city, filter the air, recharge the aquifer and produce a qualitative change in the urban landscape. At the time of publication, it was home to 25% of the total number of migratory waterfowl arriving to the national territory.
	El Batán	Summary-3 June 2016	Its ecosystem is in a good state of conservation, its landscape is made up of diverse types of vegetation and an orography that has allowed it to serve as a refuge for numerous species of fauna; it serves as a buffer to the expansion of the urban sprawl.
	El Tángano	Summary-21 September 2005	Soil conservation within the area is vital because it is the support and source of nutrients for the vegetative cover. At the time the program was published, there were 180 plant species recorded, of which 26 have some medicinal or edible use, as well as a total of 54 species that migrated to the area because there are conditions that allow them to live.
	Peña de Bernal	Summary-24 June 2011	The Peña de Bernal is a tourist attraction that provides an important economic benefit for the entire region, it is considered a remarkable geological element, since it is an intrusive igneous formation unique in the country; it is an important place for the Otomí-Chichimeca culture; it is an important geological element that protects the town of Bernal from the winds coming from the north.
Federal	Sierra Gorda Biosphere Reserve	September 1999	The reserve has flora species that are endemic or listed as threatened, rare, endangered or subject to special protection; it has valuable hydrological resources, as well as medium and high slopes that are important water catchment and supply areas that promote ecological processes and water supply for local communities.

Source: Prepared by the authors with information from the Environmental Planning Department (Ministry of Sustainable Development; La Sombra de Arteaga, volumes: CXXXVIII, CXLIII, CXLIV, CXLIX; Sierra Gorda Biosphere Reserve Management Program), 2024.



## 1.2.6

**Waste**

As a result of the intensification of industry in Mexico and the increase in the population's demand for goods and services, waste generation has increased considerably. Querétaro has a broad legal framework that establishes rules for its management.

On December 3, 2021, a law for the prevention, integral management and circular economy of state waste was published in the official newspaper "La Sombra de Arteaga", in order to increase the productivity of the materials that constitute them, propitiate the regeneration of natural resources and mitigate the release of greenhouse gases, seeking economic prosperity and social equity.

**Municipal solid waste (MSW)**

In Querétaro, during 2023, the estimated daily generation of MSW in the state reached 2,753 tons per day, 5.7% higher than the figure reported for 2022. Of the total tons, 80% come from the Querétaro Metropolitan Area and 72% are organic waste that can be treated for later use.

According to data presented in SEMARNAT's basic diagnosis for integrated waste management, the state's projected per capita contribution is 1.2 kilograms, which is higher than the national average of 0.9 kilograms.

Total estimated net greenhouse gas emissions for the state in 2021 were 9,806.82 Gg/yr of CO<sub>2</sub>e, with the waste sector contributing 6.97% of total emissions according to the 2021 base year inventory.

**Special handling waste**

In 2023, Querétaro will generate an estimated 7,000 tons of this waste per day, of which 58.2% will be recovered and the rest will be confined in landfills. In the same year, 488 Environmental Service Providers were authorized for waste management.

In order to prevent the waste generated from being deposited in final disposal sites and shorten its useful life, in 2023 the Ministry of Sustainable Development authorized a diversion of 300,243 tons distributed as follows:

- ▶ 276,997 tons as soil improver in accordance with NOM-004-SEMARNAT-2002.
- ▶ 3,277 tons as cattle feed.
- ▶ 14,861 tons in authorized draught bank for restoration.
- ▶ 5,108 tons as raw material for other production processes.



## Landfills in Querétaro (2023)

NAME OF DISPOSAL SITE	MUNICIPALITY WHERE IT IS LOCATED	ESTIMATED RECEPTION (TON/DAY)	PUBLIC OR PRIVATE	OBSERVATIONS
Relleno Sanitario Veolia Residuos Bajío S.A. de C.V.	Querétaro	900	Private	Receives from the municipality of Querétaro
Arroyo Seco landfill	Arroyo Seco	10	Public	Receives from the municipality of Arroyo Seco
CEMIRQ landfill	Colón	1,000	Private	Receives from the municipality of Ezequiel Montes, Cadereyta de Montes, Pinal de Amoles, San Joaquín, Corregidora, Tolimán and Pinal de Amoles
Huimilpan landfill	Huimilpan	13	Public	In procedure with PEPMADU (out of operation)
Jalpan de Serra landfill	Jalpan de Serra	18	Public	Receives from the municipality of Jalpan de Serra and Pinal de Amoles
Landa de Matamoros landfill	Landa de Matamoros	15	Public	Receives from the municipality of Landa de Matamoros
San Juan del Río landfill	San Juan del Río	270	Public	Receives from the municipality of San Juan del Río and Pedro Escobedo
Tequisquiapan landfill	Tequisquiapan	60	Public	Receives from the municipality of Tequisquiapan

Source: Prepared by the Environmental Control Division (Ministry of Sustainable Development), 2024.

## Controlled sites in Querétaro (2023)

NAME OF DISPOSAL SITE	MUNICIPALITY WHERE IT IS LOCATED	ESTIMATED RECEPTION (TON/DAY)	PUBLIC OR PRIVATE	OBSERVATIONS
Amealco de Bonfil Final Disposal Site	Amealco de Bonfil	30	Public	Receives from the municipality of Amealco and Huimilpan
Cadereyta de Montes Disposal Site	Cadereyta de Montes	-	Public	Out of operation by the municipality
Corregidora, El Paraíso Disposal Site	Corregidora	-	Private	In procedure with PEPMADU (out of operation)
Peñamiller Disposal Site	Peñamiller	17	Public	Receives from the municipality of Peñamiller
San Joaquín Disposal Site	San Joaquín	5.5	Public	Out of operation by the municipality

Source: Prepared by the Environmental Control Division (Ministry of Sustainable Development), 2024.

## Final disposal sites

Querétaro had 13 operating sites in 2023. Of the total, eight were considered sanitary landfills and five, although built as sanitary landfills, were considered controlled sites due to non-compliance with operational characteristics.

A total of 97% of the urban solid waste generated in Querétaro was confined in sanitary landfills and 3% in controlled sites.

In the entity, nine municipalities deposited their urban solid waste in a different municipality and three municipalities had self-managed sites that, for administrative reasons, remain closed.

In order to optimize waste collection and transportation, the transfer stations served five municipalities: Pinal de Amoles, El Marqués, Tolimán, Cadereyta de Montes (El Doctor) and Landa de Matamoros (El Madroño).





### Actions for the efficient management of MSW and special handling waste

To improve integrated waste management, in 2023, support was provided for a waste project in the amount of 4,275,000 pesos.

#### Projects benefiting from waste management in Querétaro (2023)

PROJECT NAME	BENEFICIARIES	AMOUNT APPROVED
Development of the State Information System on Integrated Waste Management and Circular Economy.	SEDESU	\$4,275,000

Source: Prepared by the Environmental Control Division (Ministry of Sustainable Development), 2024.

### Circular economy

The promotion of this model is one of the main objectives of the Ministry of Sustainable Development. During 2023, through the Circular Economy System Phase II, it was sought to develop capacities in organizations located in the state, through the formulation of initiatives for cleaner production, optimizing processes, cost savings and waste prevention.

In addition, based on circularity strategies such as recycling, reuse and eco-design, energy optimization, product exchange, shared use of infrastructure and collaboration in the value chain

were favored. Finally, it is intended to contribute to the implementation of business models that contemplate sustainable consumption, impact investment and information technologies.

The Circular Economy System is projected to scale to a critical mass of participating clusters, companies and institutions, started in 2021 with 55 organizations and seeks to consolidate, by 2027, close to one thousand actors that drive business competitiveness through Circular Economy initiatives.



## Strategic lines and actions of the Circular Economy System

In 2023, phase II of the scaling-up of the Querétaro Circular Economy System was developed with four business chains that brought together 56 companies and 130 participants, who formulated 97 projects with significant economic and environmental benefits.

### Economic benefits of projects in Querétaro (2023)

CONCEPT	AMOUNT
Economic benefits	216.5 Millions of pesos
Materials and wastes avoided and utilized	12,004 Tons/year
Water saved or recirculated	614,884 m <sup>3</sup> /year
Energy saved or generated from renewable sources	20.9 millions of kWh/year
Carbon emissions avoided	633,337 ton Co2eq/year

Source: Prepared by the authors with data from the Environmental Control Division (Ministry of Sustainable Development), 2024.

In addition, during this phase, an SME chain was developed with 15 companies that acted as suppliers to the industry located in the state.





## 1.2.7

**Environmental education**

SEDESU, through the Environmental Education Department, maintains close ties with the population in order to raise awareness and strengthen environmental education through workshops, events, courses and training. In 2023, the department integrated 11,117 people into its activities, exceeding the figure reached in 2022 by 468.

Among the activities carried out are the following:

- ▶ **Support and advice to companies and civil society organizations.** In coordination with the Aeronautical University of Querétaro (UNAQ), the Environmental Promoters Training Course was held in November 2023, with the participation of 349 people from educational institutions, companies, municipal officials, civil society organizations and the general public.



- ▶ **Support to educational institutions.** In conjunction with the State Commission for Higher Education Planning in Querétaro (COEPES) and the Technological University of San Juan del Rio (UTSJR), the conference “EAS Pavilion 2023 Environmental Education for Sustainability” was held. Thirty-five educational activities took place and 2,800 people attended.
- ▶ **Reforestation activities.** Reforestation was carried out in the municipality of El Marqués to promote actions to mitigate climate change and conserve biodiversity, in coordination with a group of young scouts.

- ▶ 34 environmental awareness talks were given in companies, subdivisions and schools.
- ▶ A collection center was set up in the Los Encinos subdivision in the Municipality of El Marqués.
- ▶ Holding of the second beekeepers’ symposium. Conferences, workshops and round tables were held on the importance of beekeeping in the state of Querétaro. The activity was held at the Marista University facilities. The event was attended by 195 people, including students, beekeepers and the general public.



1.3

# Sociodemography

1.3.1

## Population structure

According to the 2020 Population and Housing Census, published by INEGI, a total of 126,014,024 people are registered nationwide, a figure that reports a growth of 5.4% compared to 2015, when 119,530,753 people were registered.

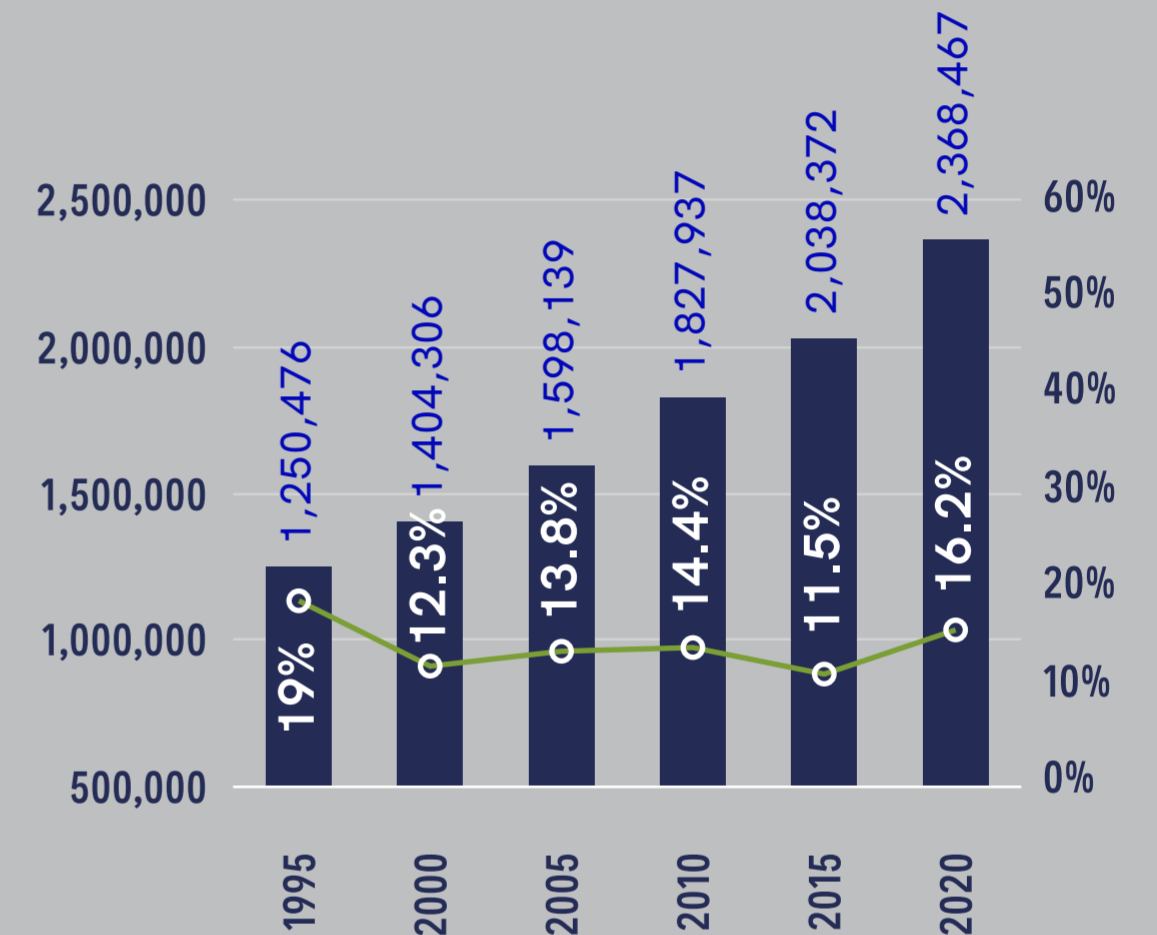
The states that concentrated the largest volumes of population were: Estado de México (16,992,418 people); Ciudad de México (9,209,944); Jalisco (8,348,151); Veracruz (8,062,579); and Puebla (6,583,278).

Querétaro registered 2,368,467 inhabitants, placing it in 21st place among the most populated states.

Population growth in the state has remained constant, however, from 1995 to 2020 it has increased by 89.4%.

## Population growth in Querétaro (1995-2020)

Population      Var. % previous five-year period



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (XI General Population and Housing Census 1990, Population and Housing Count 1995, XII General Population and Housing Census 2000, II Population and Housing Count 2005, Population and Housing Census 2010, Intercensal Survey 2015, Population and Housing Census 2020), 2024.

During 2020, in Querétaro 51.2% (1,156,820) of the population were women and 48.8% (1,211,647) were men. The growth rate from 2015 to 2020 was 30.4% and 28.8%, respectively.



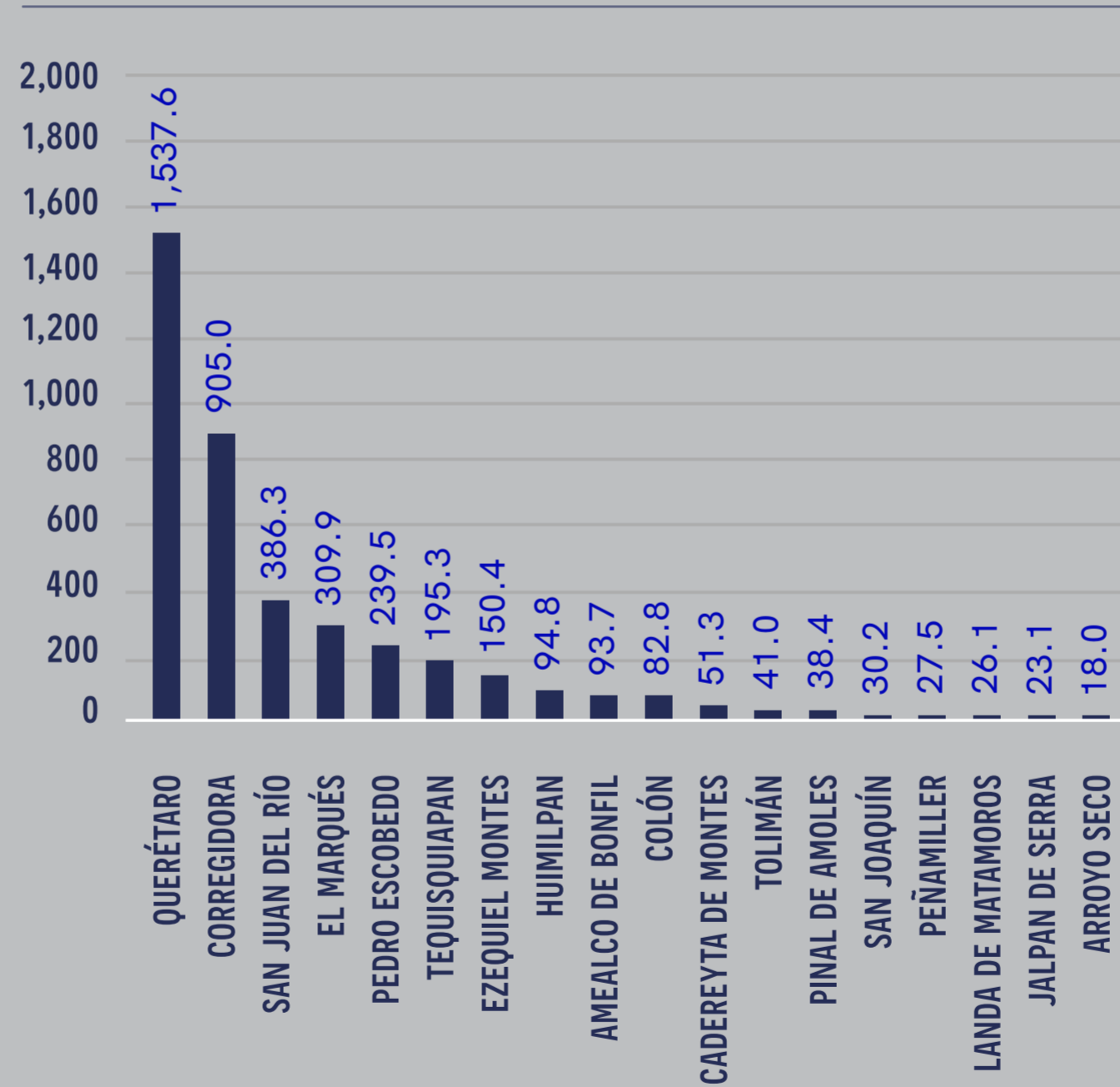
### Population density

At the national level, the population density is 64.1 inhabitants per square kilometer; however, some states stand out for having very large population concentrations.

Among the states with the highest population density are: Ciudad de México, 6,163.4 inhabitants/km<sup>2</sup>; Estado de México, 760.2 inhabitants/km<sup>2</sup>; Morelos, 404.1 inhabitants/km<sup>2</sup>; Tlaxcala, 336.0 inhabitants/km<sup>2</sup>; and Aguascalientes, 253.9 inhabitants/km<sup>2</sup>.

Querétaro reports 202.6 inhabitants/km<sup>2</sup>, a figure that places it in 6th place, indicating that it has a high level of population density.

Population density by municipalities (2020)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Population and Housing Census 2020), 2024.  
Note: Figures are expressed in inh/km<sup>2</sup>.



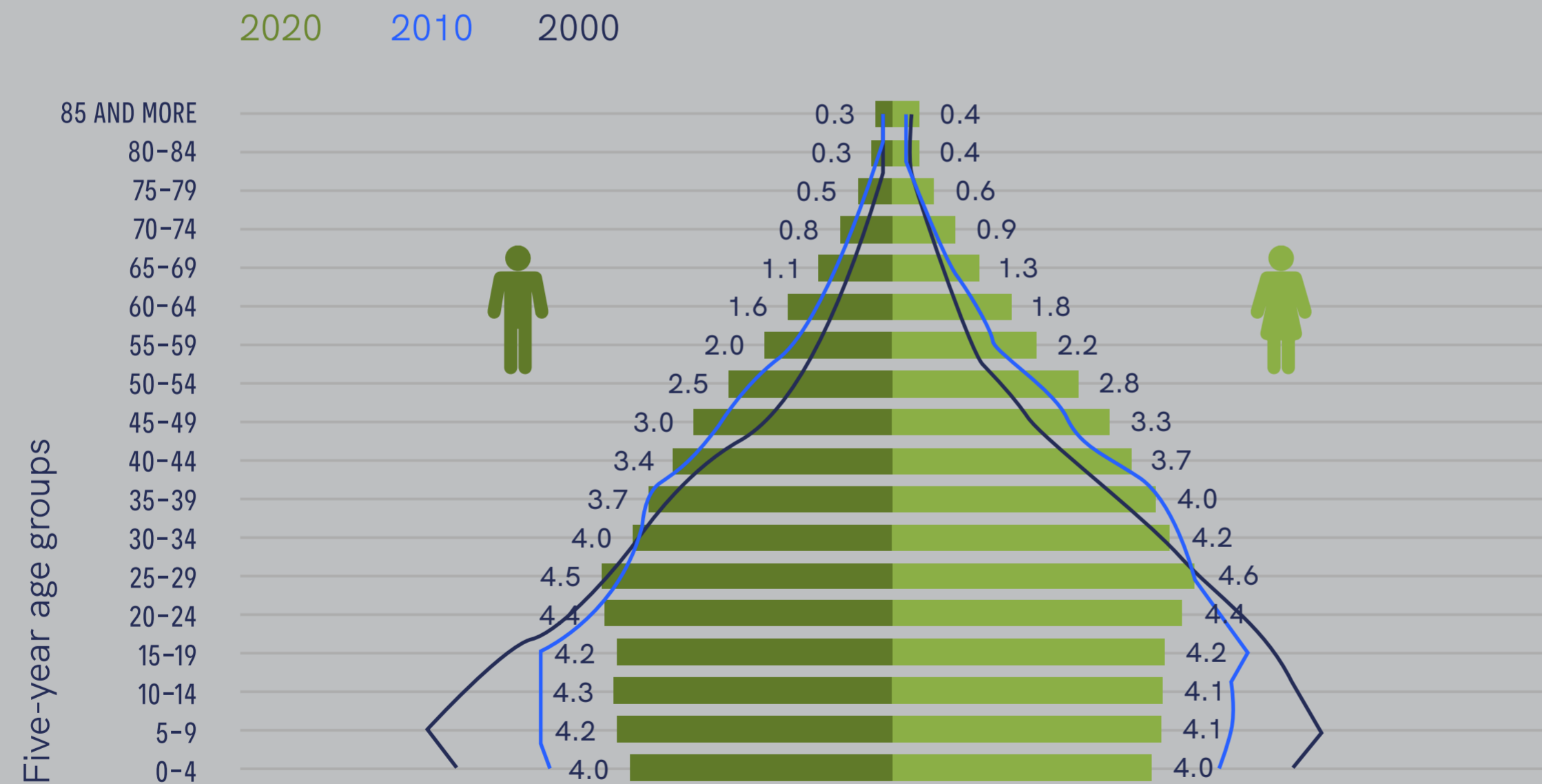


# Population dynamics in the state

According to the National Population Council, the average age of the population in Querétaro in 2023 was 29 years, in 2020 the indicator was 28 years and in 2013 it was 25 years.

The 2020 population pyramid shows a decrease in the base compared to 2000 and 2010. In 2020, the age groups between 20 and 29 years old were more representative, hence Querétaro is perceived as a young state.

Population structure dynamics in Querétaro (2020)



Source: Prepared by the National Institute of Statistics and Geography (Census of Population and Housing 2020), 2024. Note: Percentages may not add up to 100%, due to rounding that generates insignificant differences.





### Population dynamics in the municipalities

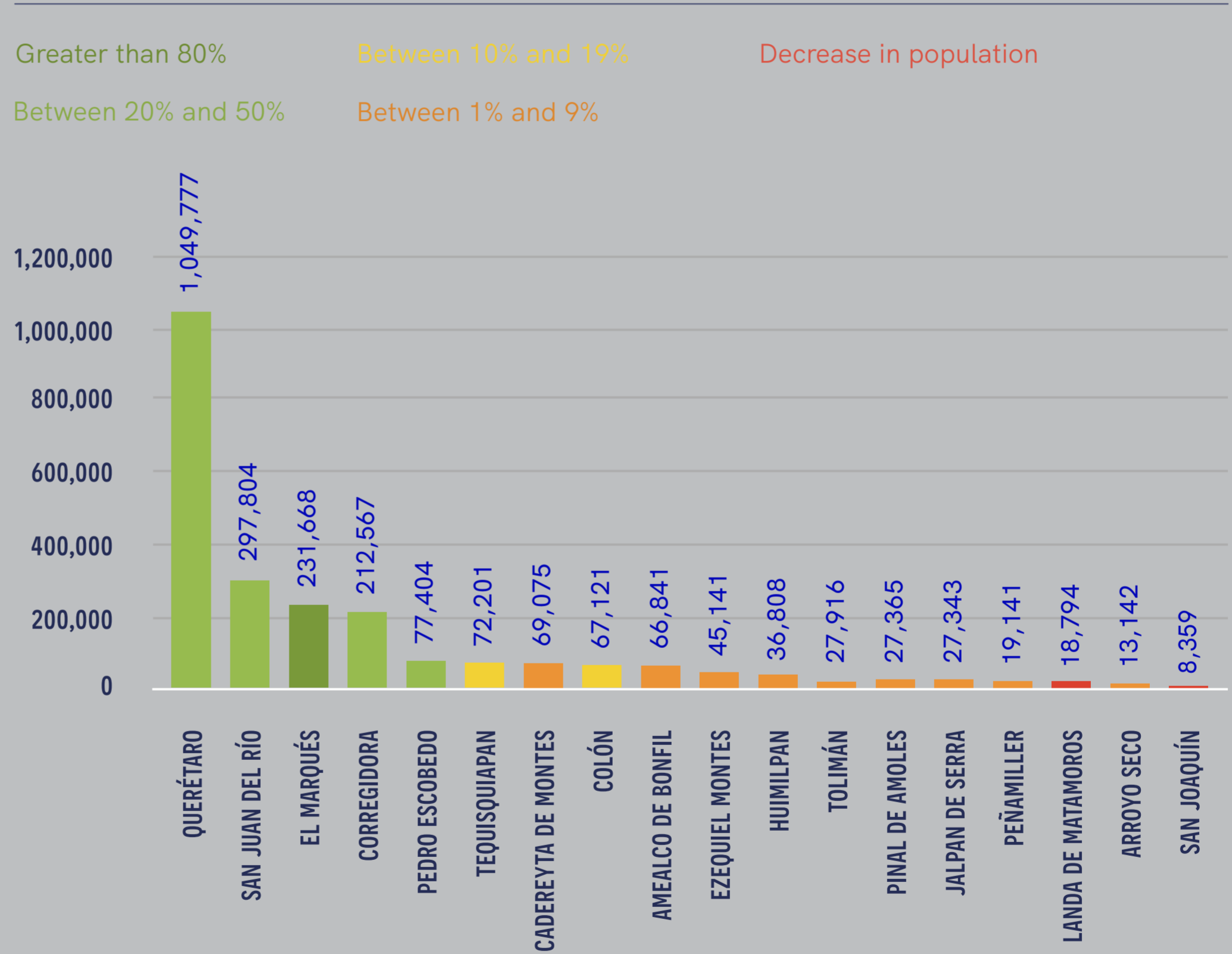
The municipality with the largest population was Querétaro, followed by San Juan del Río, El Marqués and Corregidora. Together they account for 75.7% of the state’s population.

On the other hand, the districts with the lowest population were San Joaquín, Arroyo Seco, Landa de Matamoros and Peñamiller. Together, they account for only 2.5% of the total.

The municipalities concentrate their population mainly in the following age groups:

- ▶ 5 to 9 years old: Amealco de Bonfil, Cadereyta de Montes, Colón, Ezequiel Montes, Pedro Escobedo, San Joaquín and Tolimán.
- ▶ 10 to 14 years old: Arroyo Seco, Huimilpan; Landa de Matamoros, Peñamiller, Pinal de Amoles, San Juan del Río and Tequisquiapan.
- ▶ 15 to 19 years old: Corregidora.
- ▶ 25 to 29 years old: El Marqués and Querétaro.

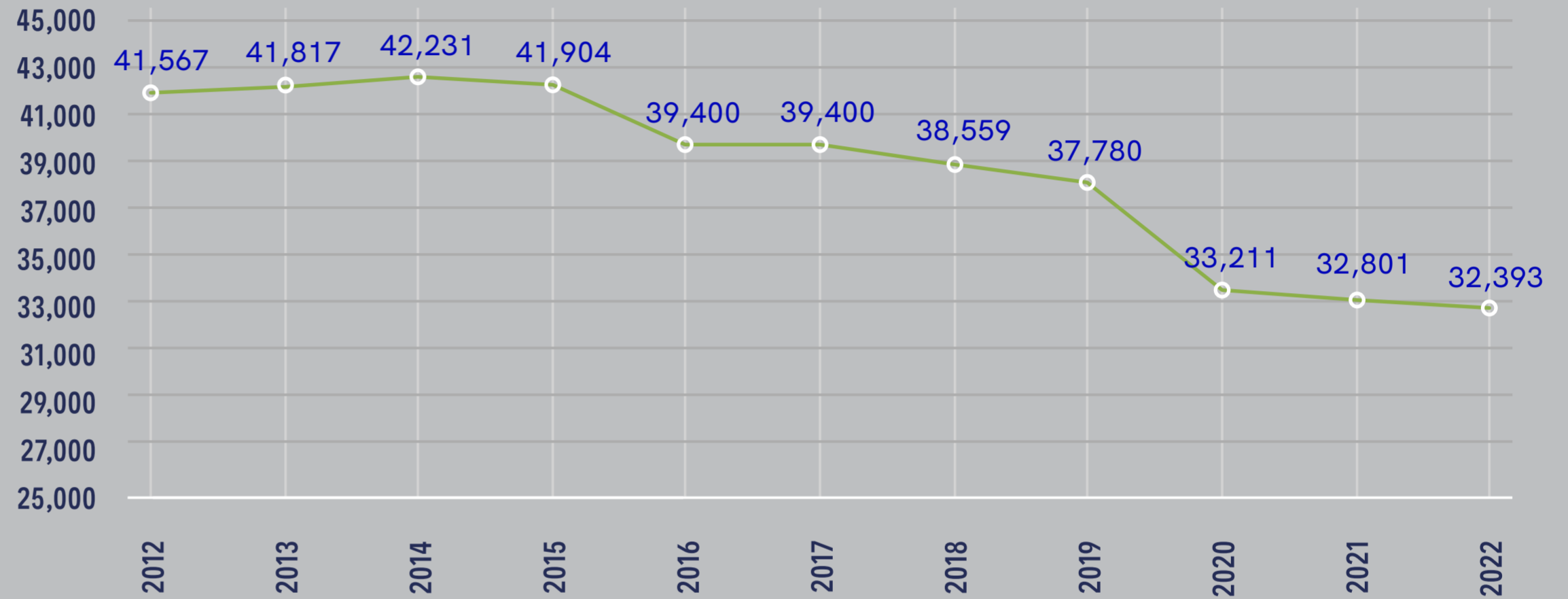
Population by municipality in Querétaro (2020)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Population and Housing Census 2020), 2024. Note: The colors represent population growth levels from 2010 to 2020.



### Registered births in Querétaro (2012-2022)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Birth and fertility rates), 2024.

### 1.3.2

## Birth and fertility rates

### Birth

In 2022, 1,891,388 births were registered nationwide, a figure that maintains an annual variation of -1.1%, with 50.8% being male and 49.2% female.

During the same year, 32,393 births were registered in Querétaro, a figure that maintains an annual variation of -1.2% and -22.1% with respect to 2012. The aforementioned figure represents 1.7% of the national figure.

Of the total number of births during 2022 in Querétaro, 49.2% were female and 50.8% were male.

The trend of teenage pregnancies in the state continues to decline. In 2012 the percentage of teenage pregnancies was 17%, by 2021 the figure stood at 12.7% and in 2022, the figure decreased to 12.1%, being the state with the second lowest percentage of teenage pregnancies.

### Birth in Querétaro (2019-2022)

YEAR	TOTAL	WOMEN	MEN	VAR. % PREVIOUS YEAR	TEENAGE PREGNANCY
2019	37,780	18,714	19,066	-4.1%	14.2%
2020	33,211	16,893	16,318	-12.1%	12.8%
2021	32,801	16,167	16,634	-1.2%	12.7%
2022	32,393	15,950	16,443	-1.2%	12.1%

Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Birth and fertility rates), 2024.





### Fertility rates

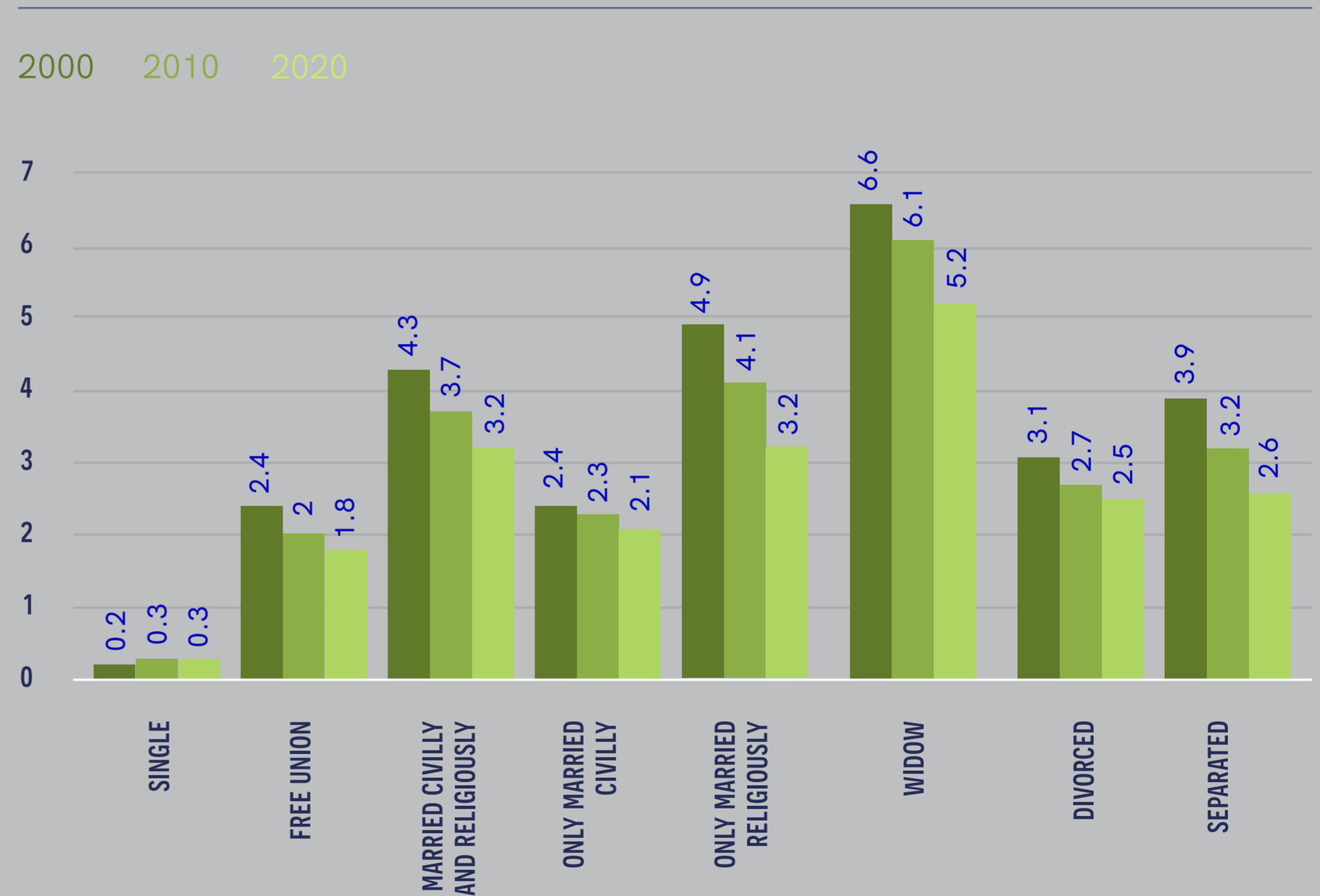
#### Average number of births (2010-2020)

LEVEL	2010	2015	2020
National	2.6	2.3	2.1
Querétaro	2.6	2.3	2.0

Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Birth and fertility rates), 2024.

Marital status is an influential factor that determines the average number of children born. According to figures reported by the National Institute of Statistics and Geography (INGEI), the highest value is among widowed women aged 12 years and older, reaching an average of 5.2 children in 2020; however, the figure shows a downward trend.

#### Average number of live births by marital status in Querétaro (2000-2020)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Birth and fertility rates), 2024. Note: The average number of children born was considered based on women aged 12 years and older.



1.3.3

### Morbidity

According to the Ministry of Health, “morbidity” is defined as any subjective or objective separation from the state of physiological or psychological well-being. State or municipal morbidity is defined as the content of general or selected diseases, according to the state or municipality where the patient usually resides.

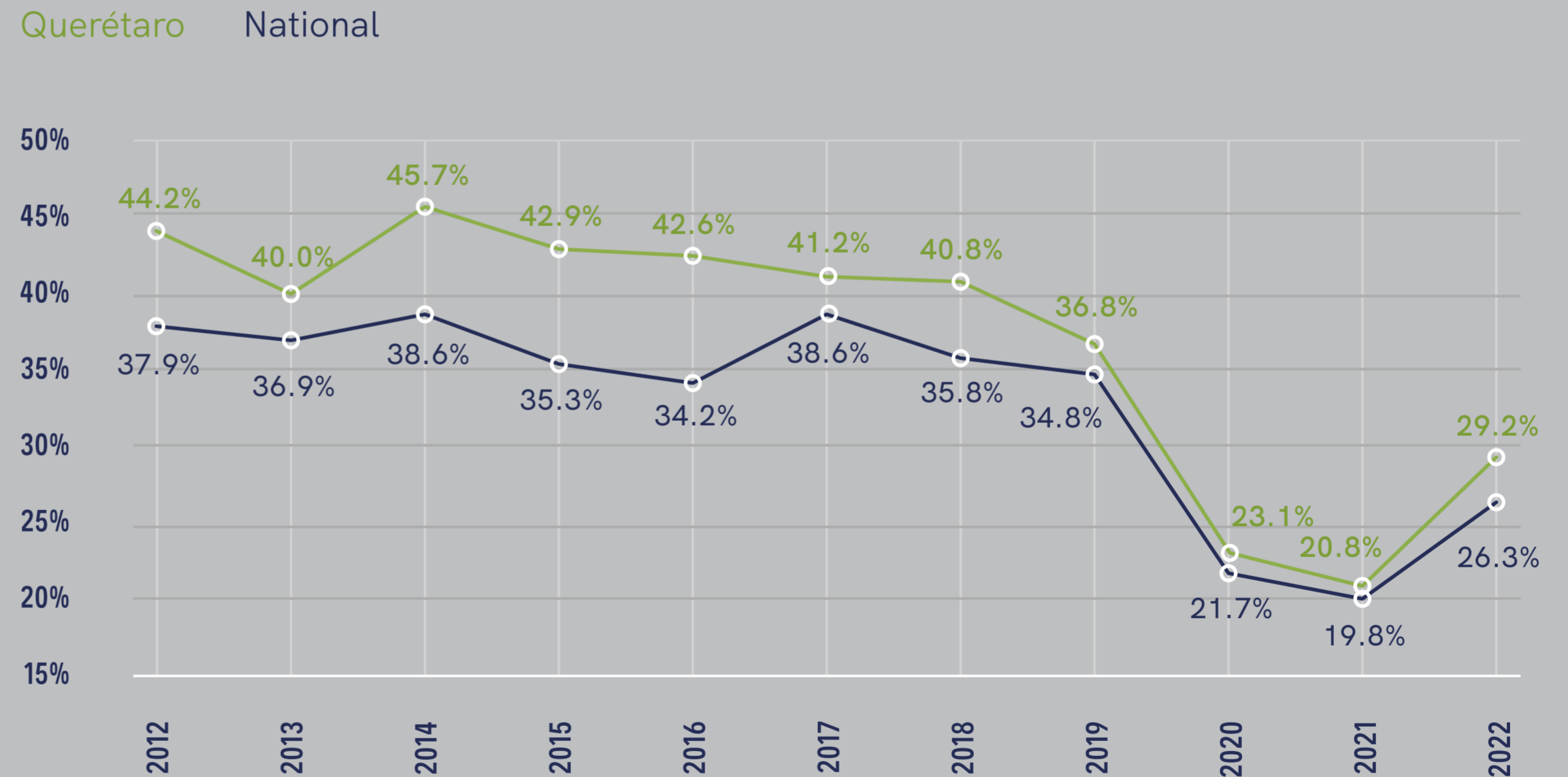
### Epidemiological profile

The morbidity rate throughout the years presented has maintained a similar trend, both at the national and state levels; however, the latter has remained at higher levels. Despite this, the gap between the two has shown a reduction. In 2012, the value reported at the state level was higher by 6.3 percentage points, while this decreased to 2.9 percentage points in 2022.

From 2012 to 2022, the national average morbidity rate was 32.7%, while at the state level the figure stood at 37%.

In both cases, in 2022, the rate will increase by 8.4 percentage points for the state figure and 6.5 percentage points for the national figure.

Evolution of the morbidity rate in Querétaro and National (2012-2022)



Source: Prepared by the authors with data from the Ministry of Health (Morbidity Yearly Book 1984-2022), 2024. Note: The calculation was made considering the population reported for each year in the Morbidity Yearbooks.



## Main causes of disease registered in the health sector of Querétaro (2022)

CONDITION	QUERÉTARO	VAR. % 2022 VS. 2021 <sup>1</sup>	NATIONAL <sup>2</sup>	DOMESTIC PARTICIPATION
Acute respiratory infections	356,396	70.9%	16,118,536	2.2%
COVID-19	78,641	20.0%	3,195,409	2.5%
Intestinal infections by other organisms	62,382	23.2%	3,201,789	1.9%
Urinary tract infection	59,756	14.1%	3,231,627	1.8%
Gingivitis and periodontal diseases	16,443	47.9%	903,703	1.8%
Conjunctivitis	14,638	28.5%	563,994	2.6%
Obesity	14,509	76.1%	821,255	1.8%
Ulcers, gastritis and duodenitis	13,420	3.7%	919,629	1.5%
Acute otitis media	8,433	34.2%	472,538	1.8%
Arterial hypertension	8,007	12.8%	581,045	1.4%
Motor vehicle transportation accidents	7,863	-0.9%	173,689	4.5%
Vulvovaginitis	6,974	5.0%	510,602	1.4%
Non-insulin-dependent diabetes mellitus (type II)	6,585	7.8%	476,600	1.4%
Intoxication due to scorpion stings	4,477	5.6%	274,727	1.6%
Domestic violence	3,330	-0.7%	-	-
Peripheral venous insufficiency	3,062	37.2%	185,118	1.7%
Influenza	2,693	-	251,169	1.1%
Dog bites	2,187	31.7%	-	-
Prostate hyperplasia	1,628	31.0%	118,636	1.4%
Gunshot and stab wounds	1,435	-	-	-
Other causes	15,974	18.2%	1,703,346	0.9%
<b>Total</b>	<b>688,833</b>	<b>43.2%</b>	<b>34,200,888</b>	<b>2.0%</b>

Source: Prepared by the authors with data from the Ministry of Health (Morbidity Yearly Book 1984-2022), 2024.

Note: <sup>1</sup> "Influenza" and "firearm and sharps injuries" were not recorded among the leading causes of disease during 2021, which is why it was not possible to calculate the percentage change for 2022.

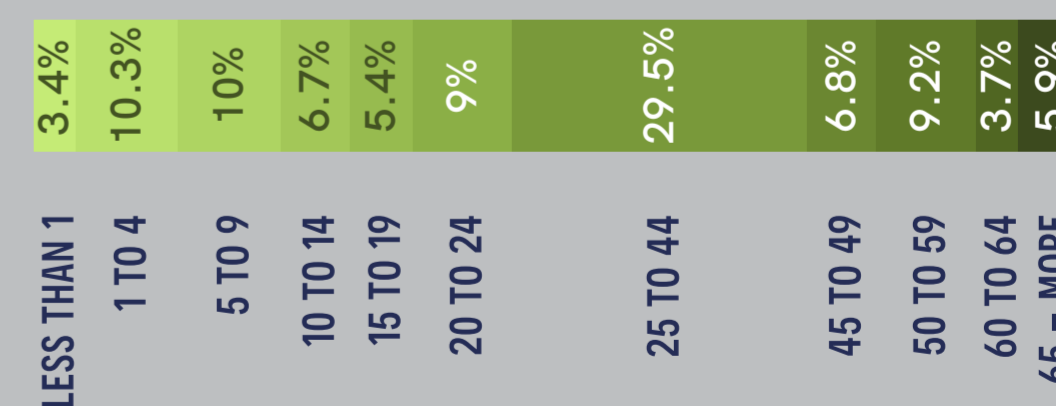
<sup>2</sup> For the national case, "domestic violence", "dog bites" and "firearm and sharp injuries" were not registered among the main causes of disease in 2022, which is why the figure was not included and the state participation was not carried out.

In Querétaro, during 2022, 688,833 cases of diseases were reported, a figure that maintains an annual variation of 43.2% and represents 2% of the national figure.

Keeping the 2021 trend, acute respiratory infections were again the most predominant, followed by COVID-19.

Illnesses predominated in those aged 25 to 44 years, followed by those aged 1 to 4 years.

## Distribution of the main causes of disease registered in the health sector by age group in Querétaro (2022)



Source: Prepared by the authors with data from the Ministry of Health (Morbidity Yearly Book 1984-2022), 2024.

Note: categories are expressed in years of age.



1.3.4

### Mortality and Life Expectancy

#### Mortality

In 2022, 847,716 deaths were registered nationwide, maintaining an annual variation of -24.5%, with 56.2% being male and 43.7% female.

During the same year, 13,551 deaths were registered in Querétaro, a figure that maintains an annual variation of -24.7% and 61.4% with respect to 2012; it represents 1.6% of those reported in Mexico.

It is important to note that the value reported for Querétaro in 2022 shows a trend closer to that recorded before the COVID-19 pandemic.

Of the total number of deaths during 2022 in Querétaro, 43.7% were women and 56.3% were men.

Deaths registered in Querétaro (2012-2022)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Mortality), 2024.

Mortality in Querétaro (2019-2022)

YEAR	TOTAL	WOMEN	MEN	NOT SPECIFIED	VAR. % PREVIOUS YEAR
2019	10,816	4,816	5,999	1	2.3%
2020	15,114	6,256	8,856	2	39.7%
2021	18,003	7,611	10,387	5	19.1%
2022	13,551	5,920	7,629	2	-24.7%

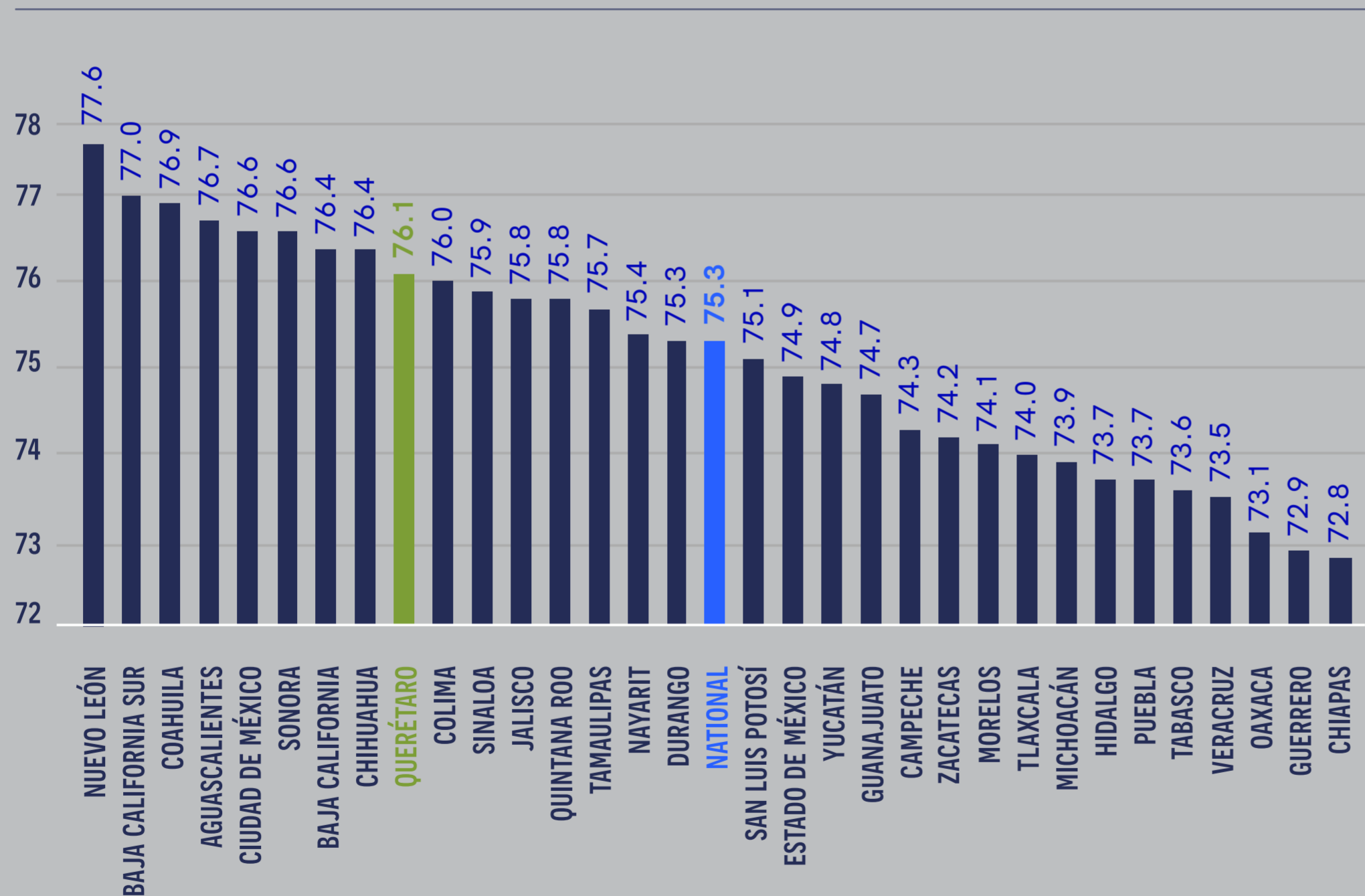
Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Mortality), 2024.



### Life expectancy

In 2023, Querétaro ranked as the 9th entity with the highest life expectancy, reaching 76.1 years, surpassing the national life expectancy of 75.3 years.

#### Life expectancy by state (2023)



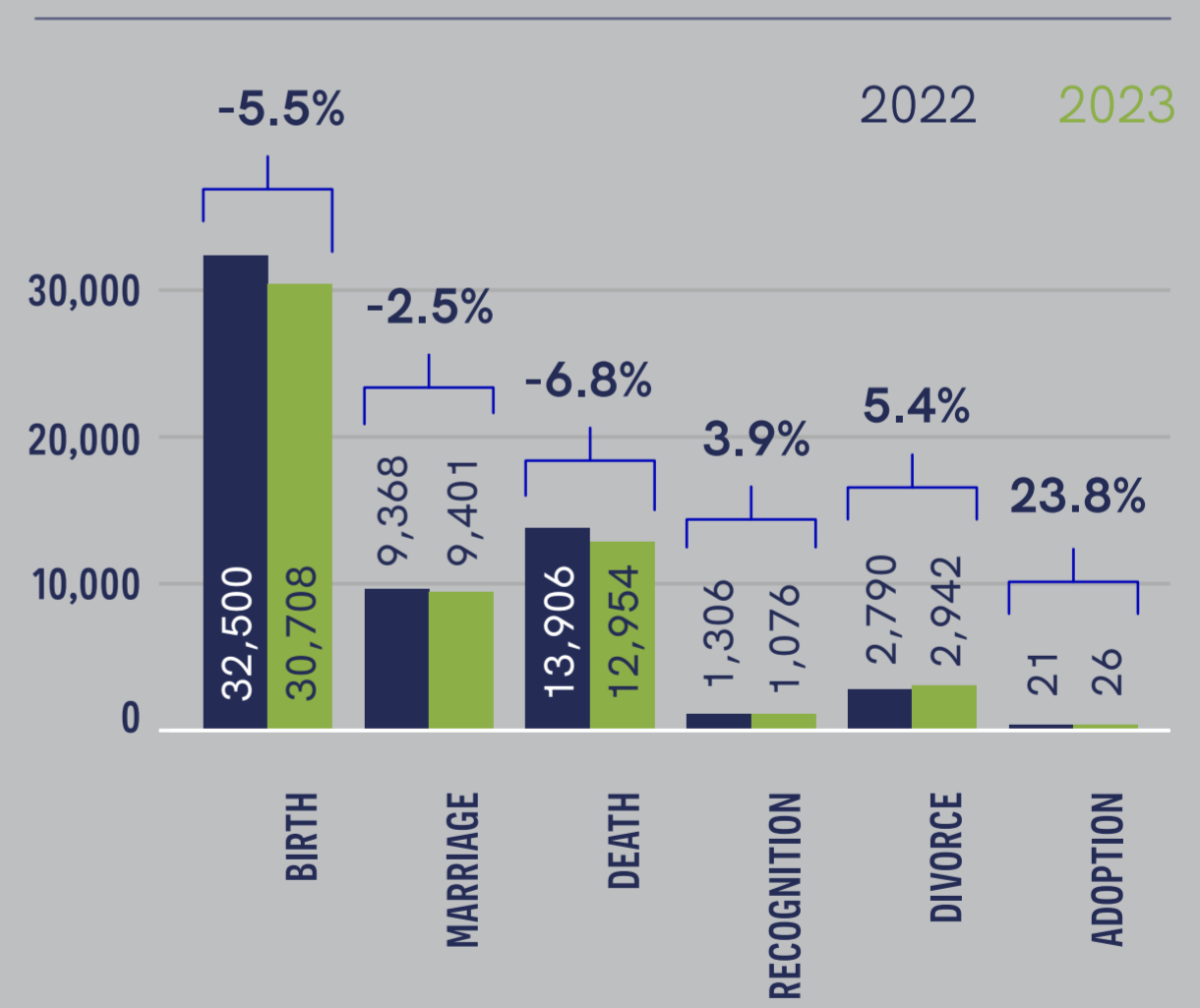
Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Mortality), 2024.

### 1.3.5

#### Civil Registry

During 2023, 57,107 acts and deeds were carried out at the civil registry, a figure that presented a decrease of 4.6% with respect to 2022. Of these, 53.8% were births, followed by deaths, which represented 22.7%.

#### Annual indicators of acts and facts of civil status of persons in Querétaro (2022-2023)



Source: Prepared by the authors with data from the State Civil Registry Office, 2024.



1.3.6

### Indigenous peoples

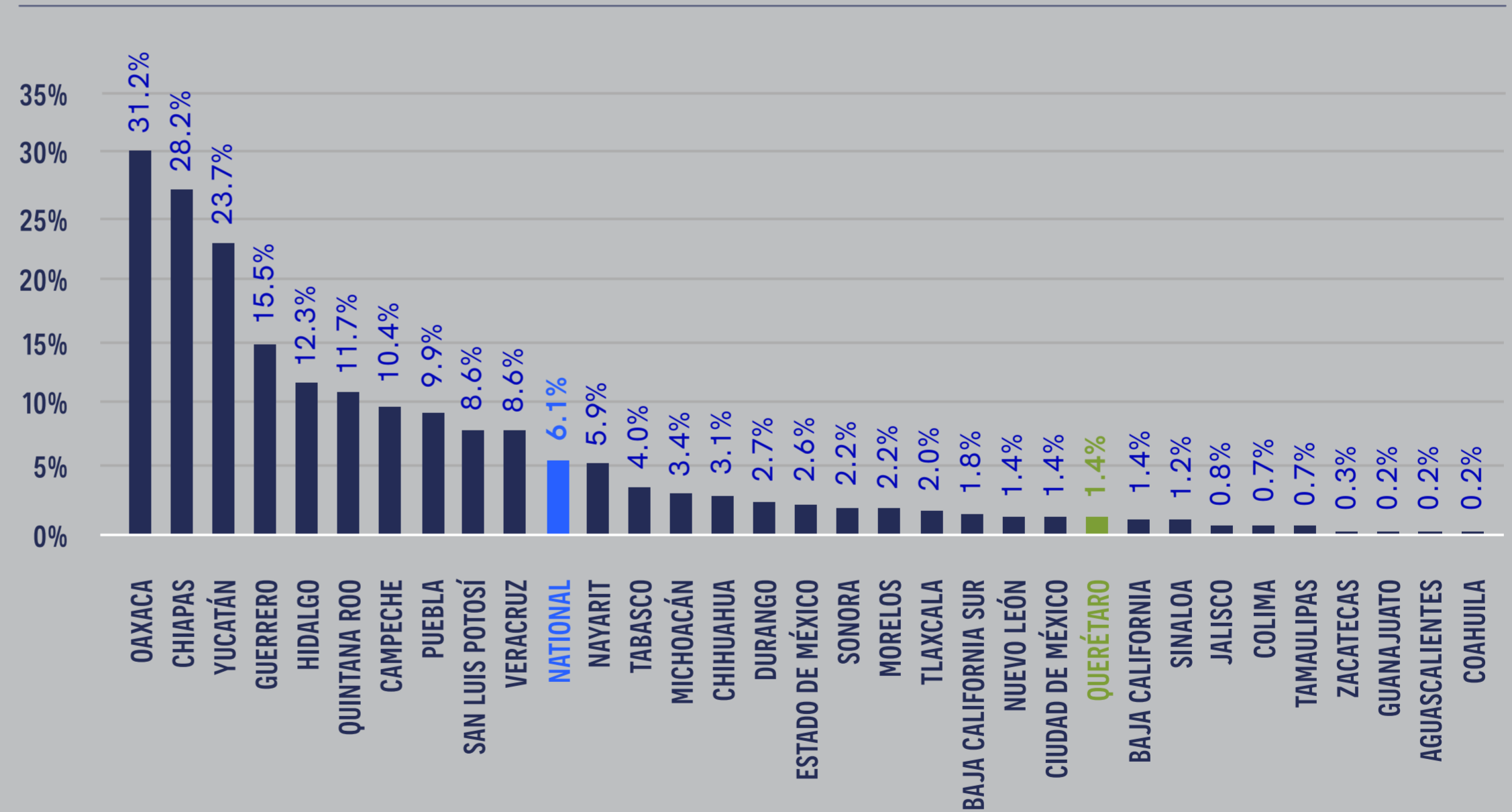
According to the Law of Rights and Culture of the Indigenous Peoples and Communities of the State of Querétaro, they are human collectives whose members are descendants of settlers who inhabited the region before the beginning of colonization and who have maintained political, economic, social and cultural practices that existed before the conformation of the state, giving it a multicultural present.

### Population representation of speakers of indigenous languages

Information published by the 2020 Population and Housing Census reveals that, nationwide, 7,364,645 people aged three years and older speak an indigenous language, of which 48.6% are men and 51.4% are women.

In Querétaro, 31,383 people aged three years and older speak an indigenous language, making it one of the states with the lowest number of speakers.

Population rate of indigenous language speakers by state (2020)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Population and Housing Census 2020), 2024. Note: To calculate the rate, the population aged 3 years and older was considered.

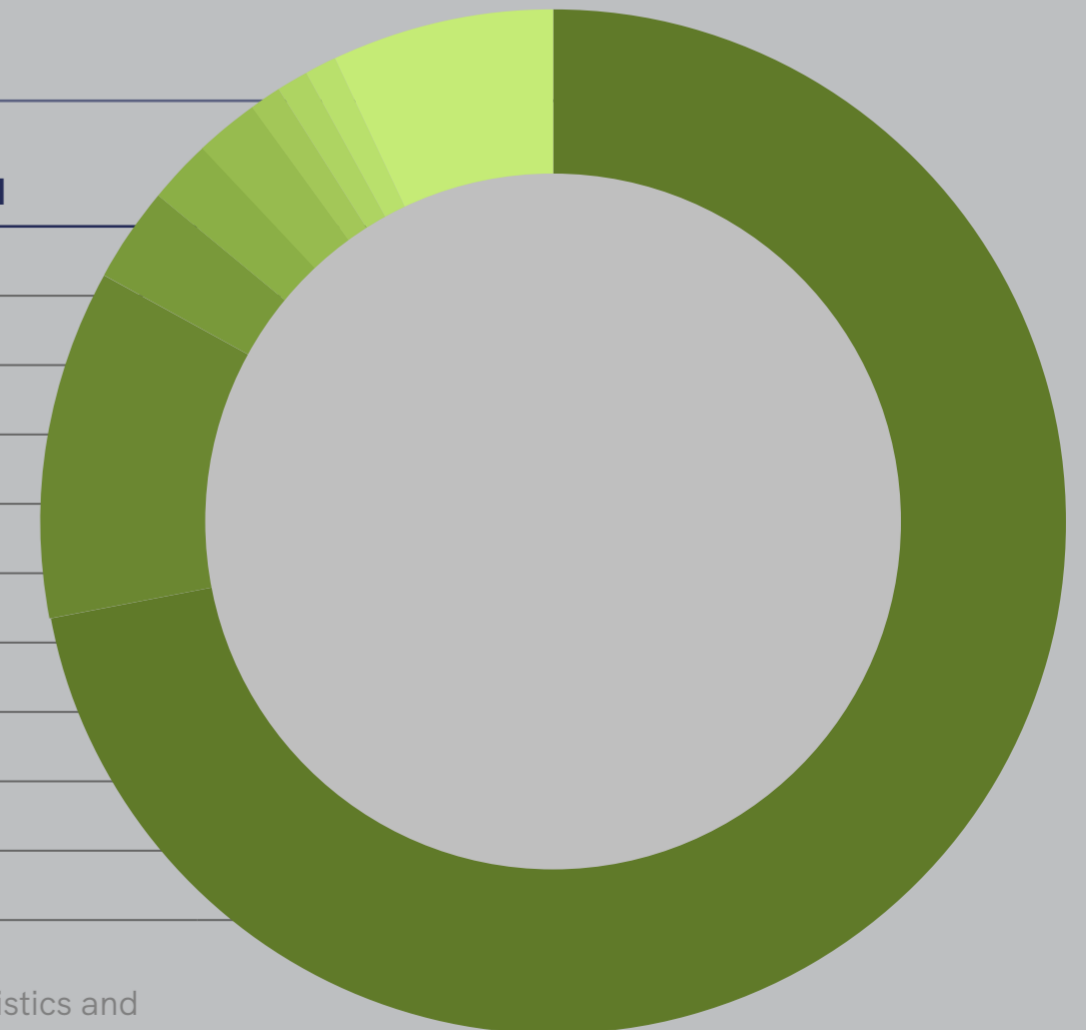


Of the total number of speakers at the state level, 50.8% are women and 49.2% are men, while only 1.9% do not speak Spanish, only one indigenous language.

Otomi is the predominant indigenous language in the state, with a total of 22,433 speakers, followed by Nahuatl with 3,442.

Distribution of speakers by indigenous language in Querétaro (2020)

INDIGENOUS LANGUAGE	SPEAKERS	DISTRIBUTION
Otomí	22,433	71.5%
Náhuatl	3,442	11.0%
Mazahua	810	2.6%
Zapoteco	720	2.3%
Mixe	494	1.6%
Mixteco	462	1.5%
Totonaco	436	1.4%
Tarasco	369	1.2%
Others	2,217	7.1%
<b>Total</b>	<b>31,383</b>	<b>100%</b>

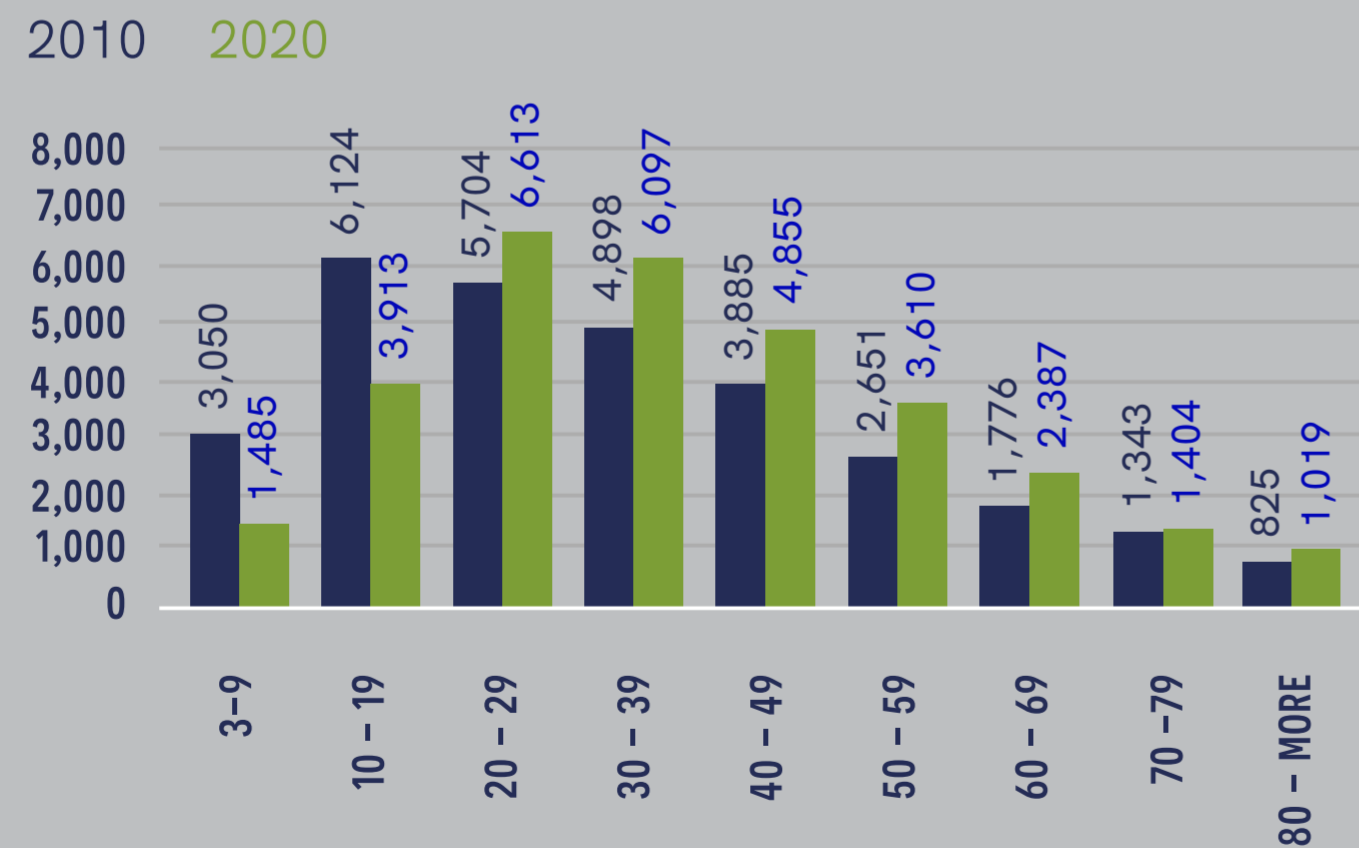


Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Population and Housing Census 2020), 2024.



From 2010 to 2020, the population aged three years and older speaking an indigenous language increased by 1,127 people. Despite the increase, the age groups from 3 to 19 years old showed a decrease in speakers, a situation that could be understood as an absence of teaching indigenous languages to new generations.

Population 3 years old and over speaking indigenous language by age group in Querétaro (2010-2020)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Population and Housing Census 2020), 2024.  
 Note: Categories refer to years.

## Level of education

In order to promote education for speakers of an indigenous language, Querétaro has indigenous schools throughout several municipalities, both for preschool and elementary school.

According to statistics from the Unit of Services for Basic Education in the State of Querétaro (USEBEQ), during the 2022-2023 school year, indigenous schools at the preschool level showed an increase of 0.6% in enrolled students with respect to the 2021-2022 school year, reaching 2,910 students. In addition, there was an increase of 0.1% in existing enrollment, which represents those who complete the school year; the percentage of graduates also increased, in this case by 0.1%.

Enrolled, existing and graduated students, teaching staff and schools in indigenous pre-schools at the end of the school year, by municipality (school year 2022-2023)

MUNICIPALITY	ENROLLED STUDENTS <sup>2</sup>	STUDENTS IN EXISTENCE <sup>1</sup>	GRADUATED STUDENTS <sup>1</sup>	TEACHERS <sup>2</sup>	SCHOOLS <sup>2,3</sup>
Amealco de Bonfil	1,170	1,210	578	57	28
Cadereyta de Montes	566	559	202	33	23
Colón	27	29	10	2	1
Ezequiel Montes	235	236	108	11	7
Tolimán	912	894	308	44	25
<b>Total</b>	<b>2,910</b>	<b>2,928</b>	<b>1,206</b>	<b>147</b>	<b>84</b>

Source: Prepared by the authors with data from the Educational Planning Department of the USEBEQ, 2024.  
 Note: Indigenous preschool is the educational service provided to indigenous children from three to five years of age, to teach them the Spanish language prior to their entry into primary education. It serves as preschool education in kindergartens.  
<sup>1</sup>Students in existence and graduates reported in the F911 statistical capture of end of cycle 2022-2023 October 2023.  
<sup>2</sup>Enrolled students, teaching staff and schools reported in the F911 statistical capture for the start of the 2022-2023 cycle in October 2022.  
<sup>3</sup>The quantification of schools is expressed in terms of shifts offered by the same campus and not in terms of physical plant.





At the primary level, the number of students decreased by 0.1%, reaching 5,862 in the 2022-2023 school year, 5,793 of them in existence and 999 graduates. Terminal efficiency for the cycle was 101.8%.

Enrolled, existing and graduated students, teaching staff and schools in indigenous elementary schools at the end of the school year by municipality (school year 2022-2023)

MUNICIPALITY	ENROLLED STUDENTS <sup>2</sup>	STUDENTS IN EXISTENCE <sup>1</sup>	GRADUATED STUDENTS <sup>1</sup>	TEACHERS <sup>2</sup>	SCHOOLS <sup>2,3</sup>
Amealco de Bonfil	3,531	3,482	593	156	24
Cadereyta de Montes	1342	1335	231	74	35
Ezequiel Montes	440	439	75	22	8
Tolimán	549	537	100	28	7
<b>Total</b>	<b>5,862</b>	<b>5,793</b>	<b>999</b>	<b>280</b>	<b>74</b>

Source: Prepared by the authors with data from the Educational Planning Department of the USEBEQ, 2024.

Note: Indigenous primary is the educational service provided to indigenous children from six to eleven years of age, to teach them the Spanish language prior to their entry into secondary education.

<sup>1</sup>Students in existence and graduates reported in the F911 statistical capture of end of cycle 2022-2023 October 2023.

<sup>2</sup>Enrolled students, teaching staff and schools reported in the F911 statistical capture for the start of the 2022-2023 cycle in October 2022.

<sup>3</sup>The quantification of schools is expressed in terms of shifts offered by the same campus and not in terms of physical plant.





During the 2022-2023 school year, 7,036 students who speak an indigenous language will be enrolled in elementary, middle and higher education, registering an increase of 10.8% with respect to the 2021-2022 school year. The municipality of Amealco de Bonfil concentrated 42.4% of the total number of students, followed by Tolimán with 24.3%, Cadereyta de Montes with 14.8%, Querétaro with 11.5% and Ezequiel Montes with 3.7%.

Compared to the previous school year, the highest growth was in the municipality of Ezequiel Montes with 119.3%, followed by Querétaro with 76.7%, Cadereyta de Montes with 64.9%, Corregidora with 47.4% and Tolimán with 31.7%.

### Indigenous language-speaking students served at different educational levels (school year 2022-2023)

MUNICIPALITY	PRESCHOOL	ELEMENTARY	SECONDARY	HIGH SCHOOL	HIGHER EDUCATION
Amealco de Bonfil	296	1,878	596	196	15
Arroyo Seco				3	
Cadereyta de Montes	228	624	167	11	14
Colón	2	67		4	17
Corregidora	17	3		5	3
El Marqués	4	4	1	12	
Ezequiel Montes	24	235		2	
Huimilpan					
Jalpan de Serra		3	1	3	12
Landa de Matamoros				2	
Pedro Escobedo		2			
Peñamiller				1	
Pinal de Amoles				4	
Querétaro	27	77	76	69	562
San Joaquín				1	
San Juan del Río		2	1	13	35
Tequisquiapan				4	1
Tolimán	37	1136	336	203	
<b>Total</b>	<b>635</b>	<b>4,031</b>	<b>1,178</b>	<b>533</b>	<b>659</b>

Source: Prepared by the authors with data from the Unit of Services for Basic Education in the State of Querétaro (Directorate of Educational Planning), 2024.



1.3.7

### Migration

In recent years, society worldwide has moved from one country to another, mainly for reasons such as violence, lack of job opportunities, natural disasters and socio-political crises, in order to obtain stability and increase their well-being.

Querétaro receives a significant number of migrants, mainly interstate, due to factors such as economic growth, security and opportunities that the state offers to its population.

### Migratory phenomenon

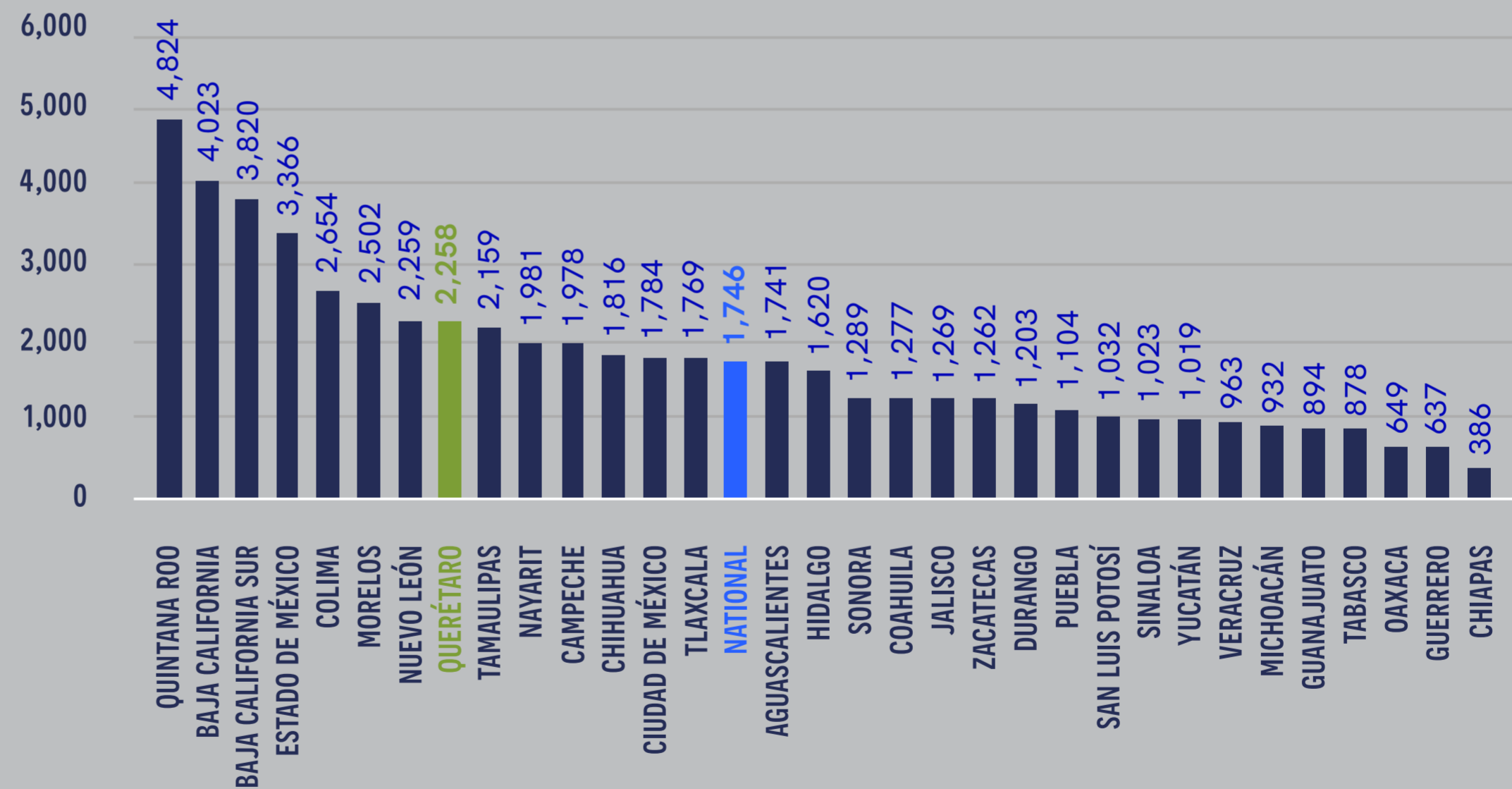
The evolution of migration in Querétaro has been a phenomenon that has been increasing over the years. During 1980, the outflow of native-born persons was greater than the inflow of new arrivals. However, by 2020, the number of people who arrived in the entity was 3.4 times higher than the number of people who emigrated from the state.

### Interstate migration

In 2023, nationally, 22,602,077 people lived in a different state to the one in which they were born, Querétaro accounted for 2.5% of them, that is, 568,945.

Querétaro ranked 8th in terms of the concentration of people born in another state per 10,000 inhabitants.

Population born in another entity per 10,000 inhabitants by state (2023)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (National Survey of Demographic Dynamics), 2024.

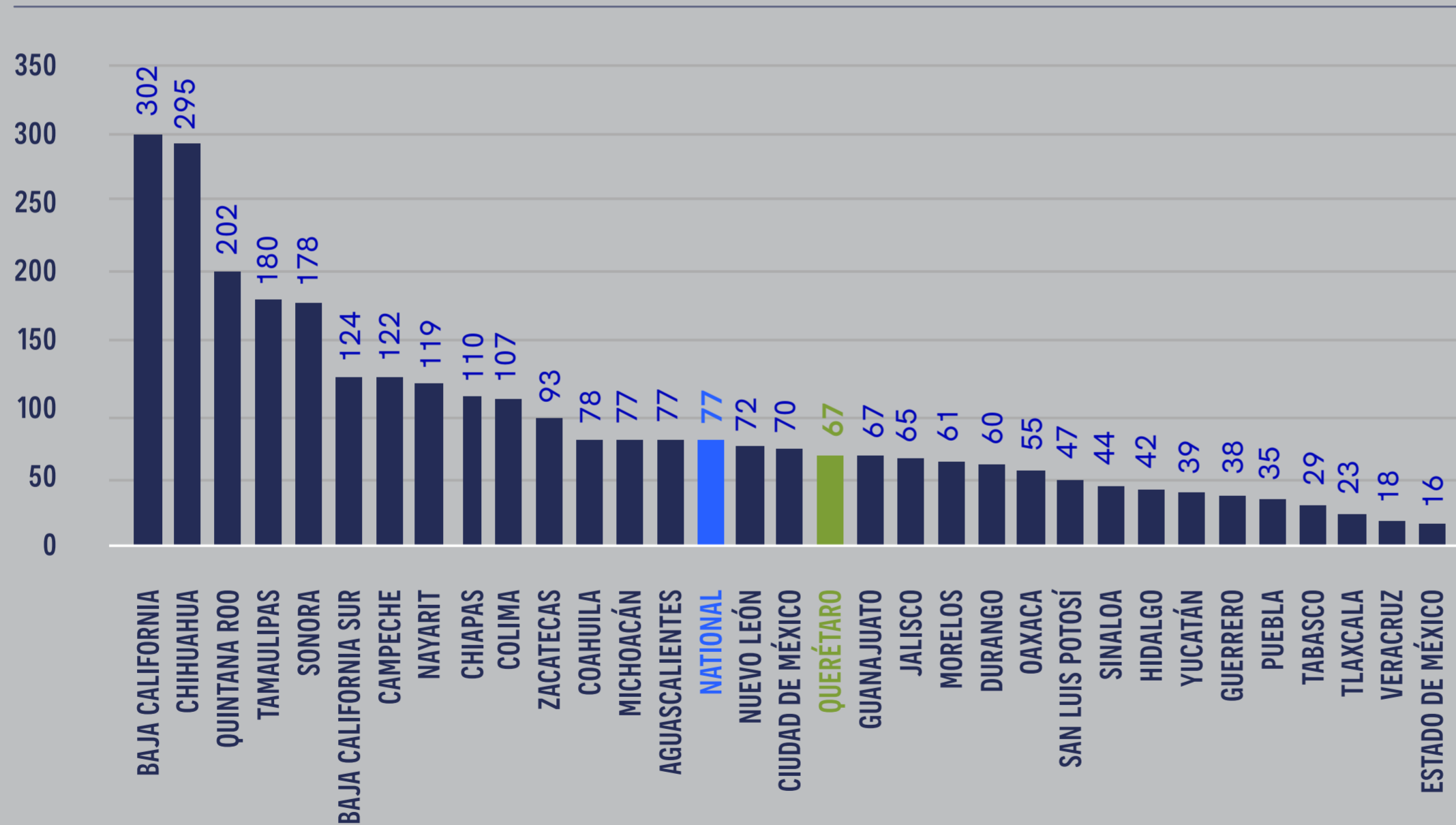


### International migration

Regarding international migration, 994,325 people who lived in Mexico were born in another country. In Querétaro, this figure is 16,779 people, or 1.7% of the national total.

Querétaro ranked 18th in terms of people living in the state who were born in another country per 10,000 inhabitants.

Population born in another country per 10,000 inhabitants by state (2023)

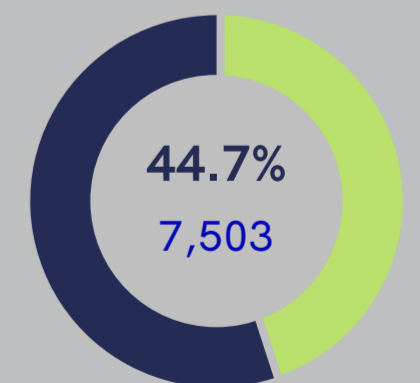
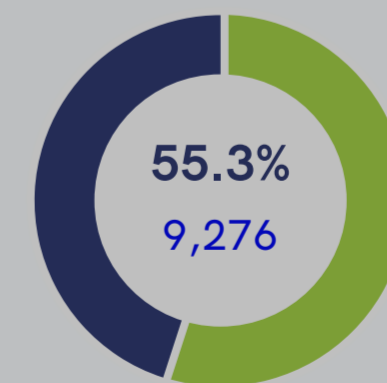


Of the 16,779 foreigners living in the state, 55.3% (9,276) are of Mexican nationality.

### Status of possession of Mexican nationality of the population born in another country in Querétaro (2023)

With nationality

Without nationality



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (National Survey of Demographic Dynamics), 2024.

Source: Prepared by the authors with data from the National Institute of Statistics and Geography (National Survey of Demographic Dynamics), 2024.

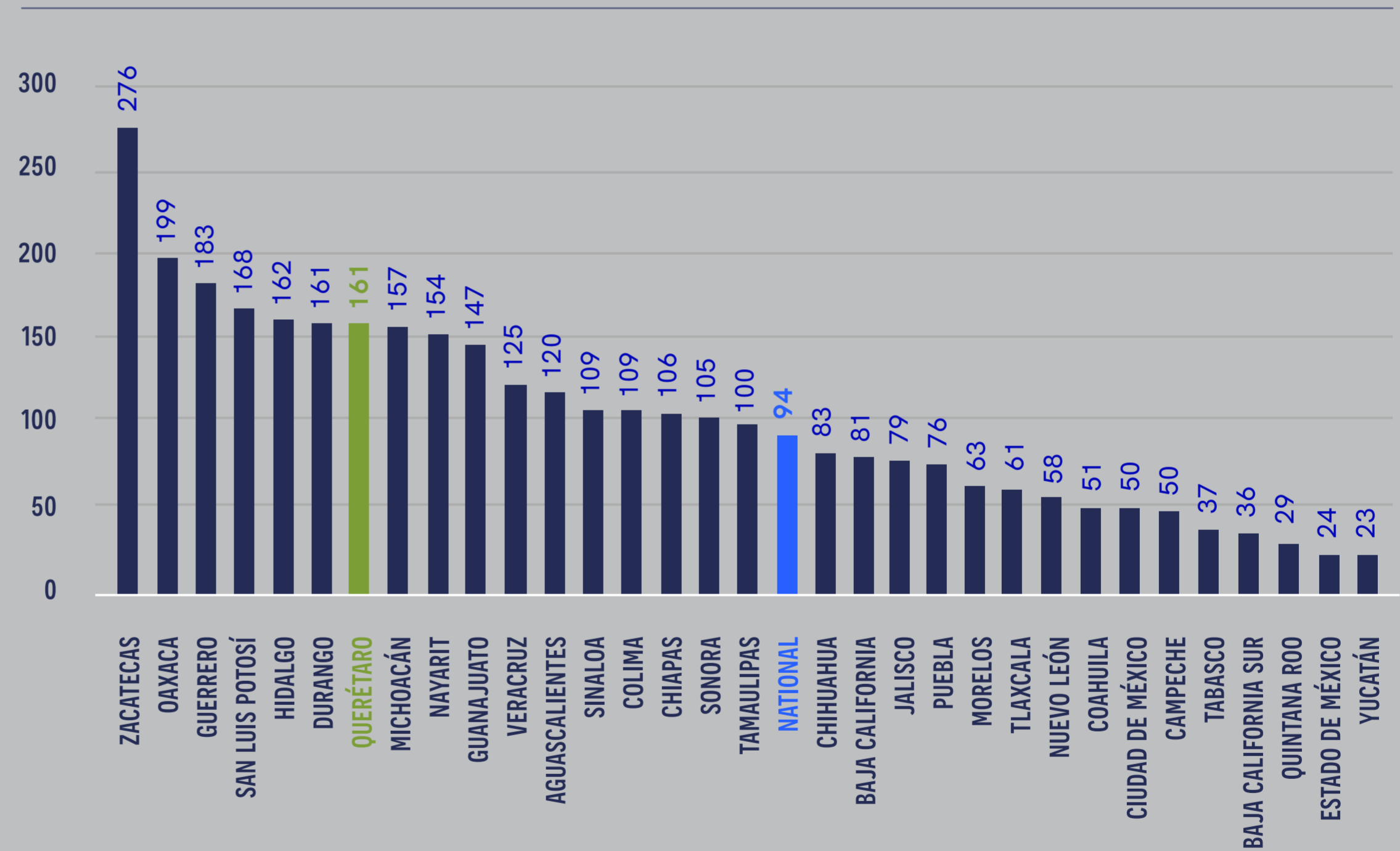


### State migration

Nationally 1,219,710 people changed their place of residence in 2023, with respect to August 2018, of which, 40,469 people migrated from Querétaro.

The state ranks among the first places in terms of people who emigrate per 10,000 inhabitants.

Emigrant population per 10,000 inhabitants by federal entity (2023)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (National Survey of Demographic Dynamics), 2024.  
Note: The information refers to people who changed their place of residence from 2018 to 2023.

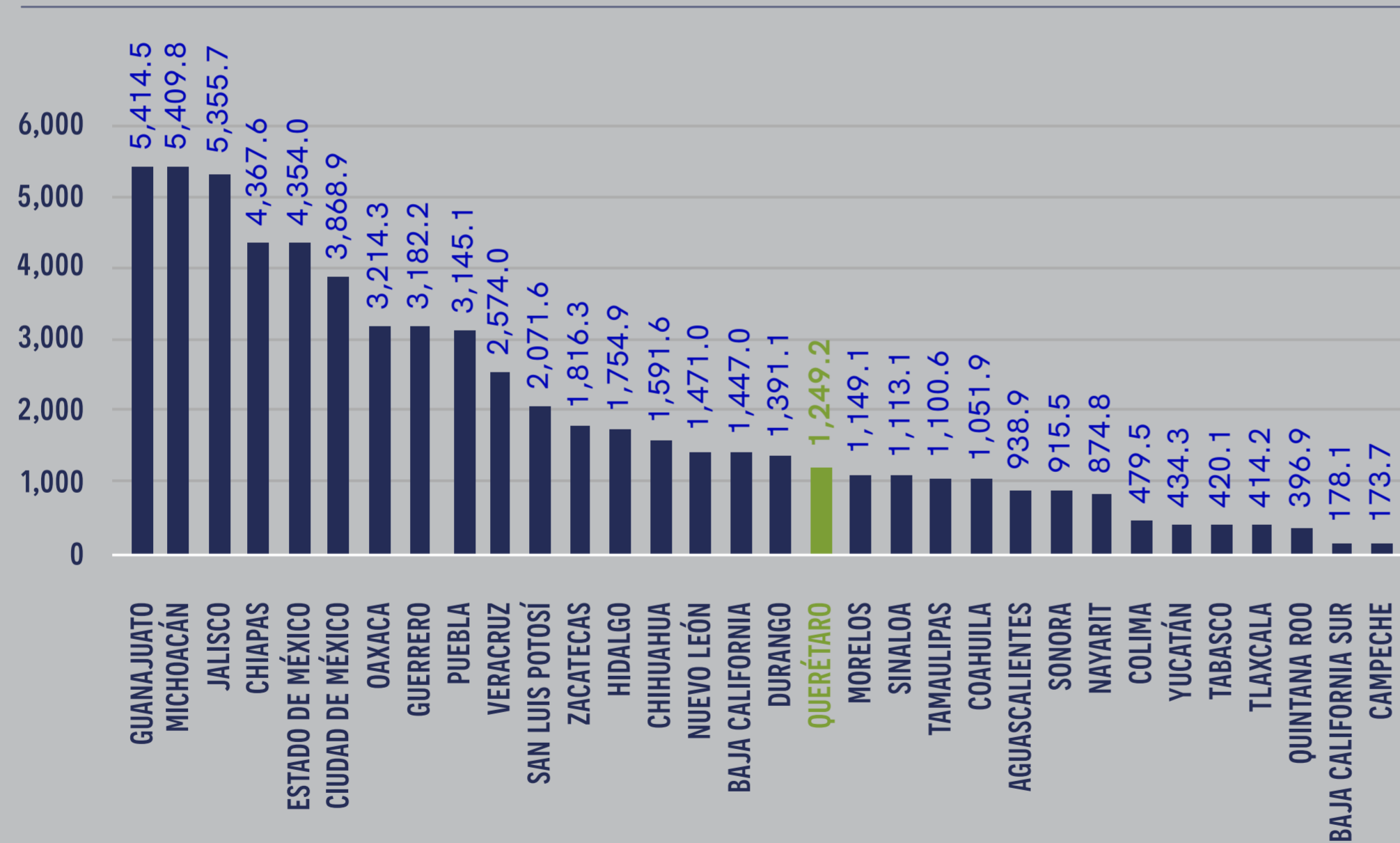


### Remittances

In 2023 Mexico received 63,319.8 MDD in remittances, exceeding the amount recorded in 2022 by 7.6%. States such as Guanajuato, Michoacán and Jalisco have the highest flow. Querétaro received 1,249.2 MDD, representing 2% of the national total.

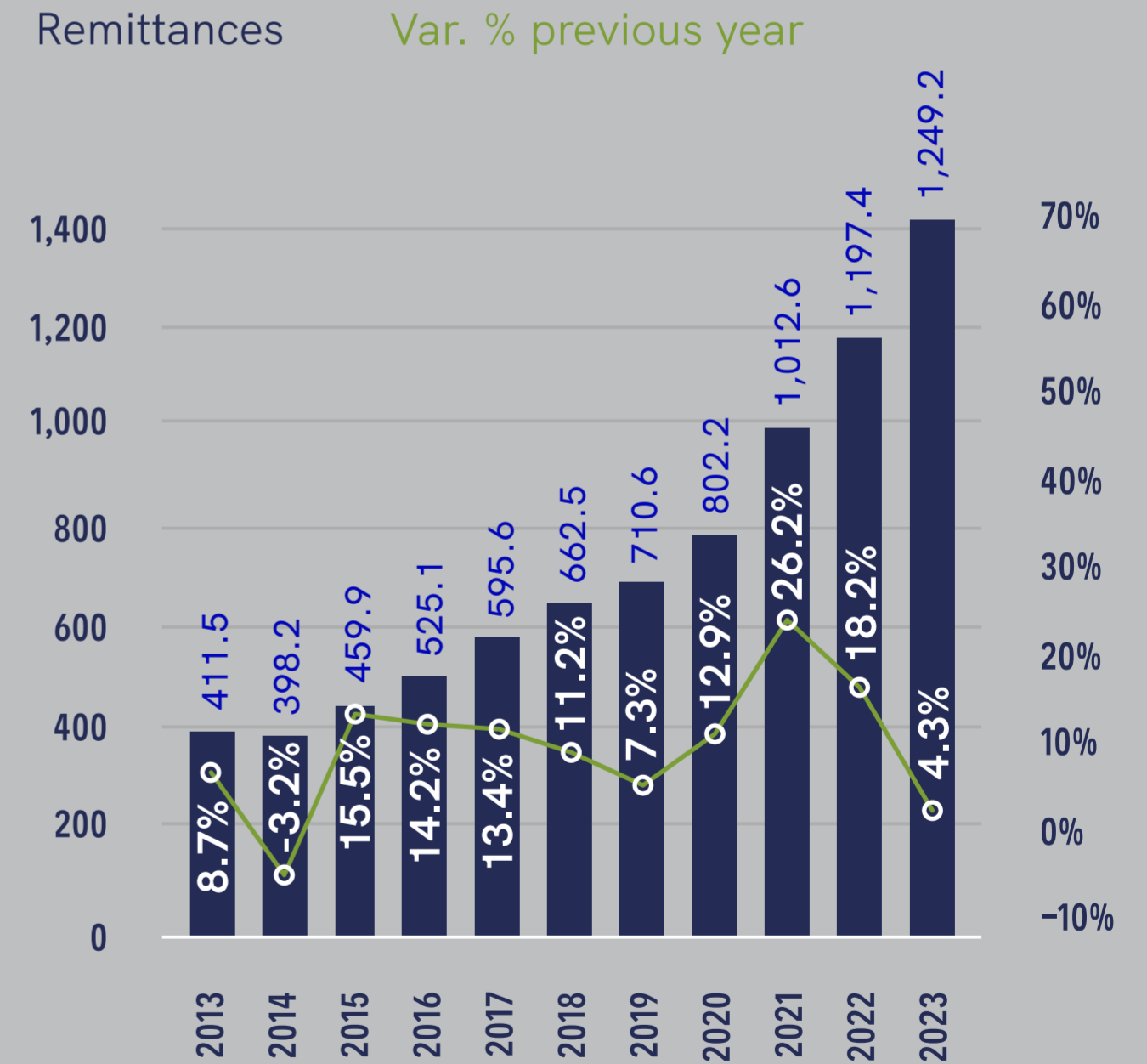
Among the states with the highest annual growth are: Chiapas (38.5%), Estado de México (23.8%), Ciudad de México (22.6%), Puebla (14.5%) and Yucatán (10.7%); Querétaro ranked 17th, with a growth of 4.3%.

Remittance income by state (2023)



Source: Prepared by the authors with data from Banco de México (Economic Information System - Remittances by State), 2024. Note: Figures are expressed in millions of dollars.

Evolution of remittance income in Querétaro (2013-2023)



Source: Prepared by the authors with data from Banco de México (Economic Information System - Remittances by State), 2024. Note: Figures are expressed in millions of dollars.



## 2

## Infrastructure and equipment

Government policies in Querétaro are aimed at ensuring that the state continues to be a benchmark in logistics, an objective that is planned to be achieved through the development and expansion of various social areas and economic sectors. Therefore, optimizing the operation of public transportation and hydraulic and pluvial infrastructure is crucial to maintain sustainable mobility and ensure a good quality of life for the inhabitants.



## 2 Infrastructure and equipment

### 2.1 Urban development and housing

- 2.1.1 Urban development
- 2.1.2 Housing

### 2.2 Hydraulic sector

- 2.2.1 Hydraulic infrastructure of the State Water Commission (CEA)
- 2.2.2 Water Infrastructure Municipal Water and Sewerage Board (JAPAM)

### 2.3 Energy

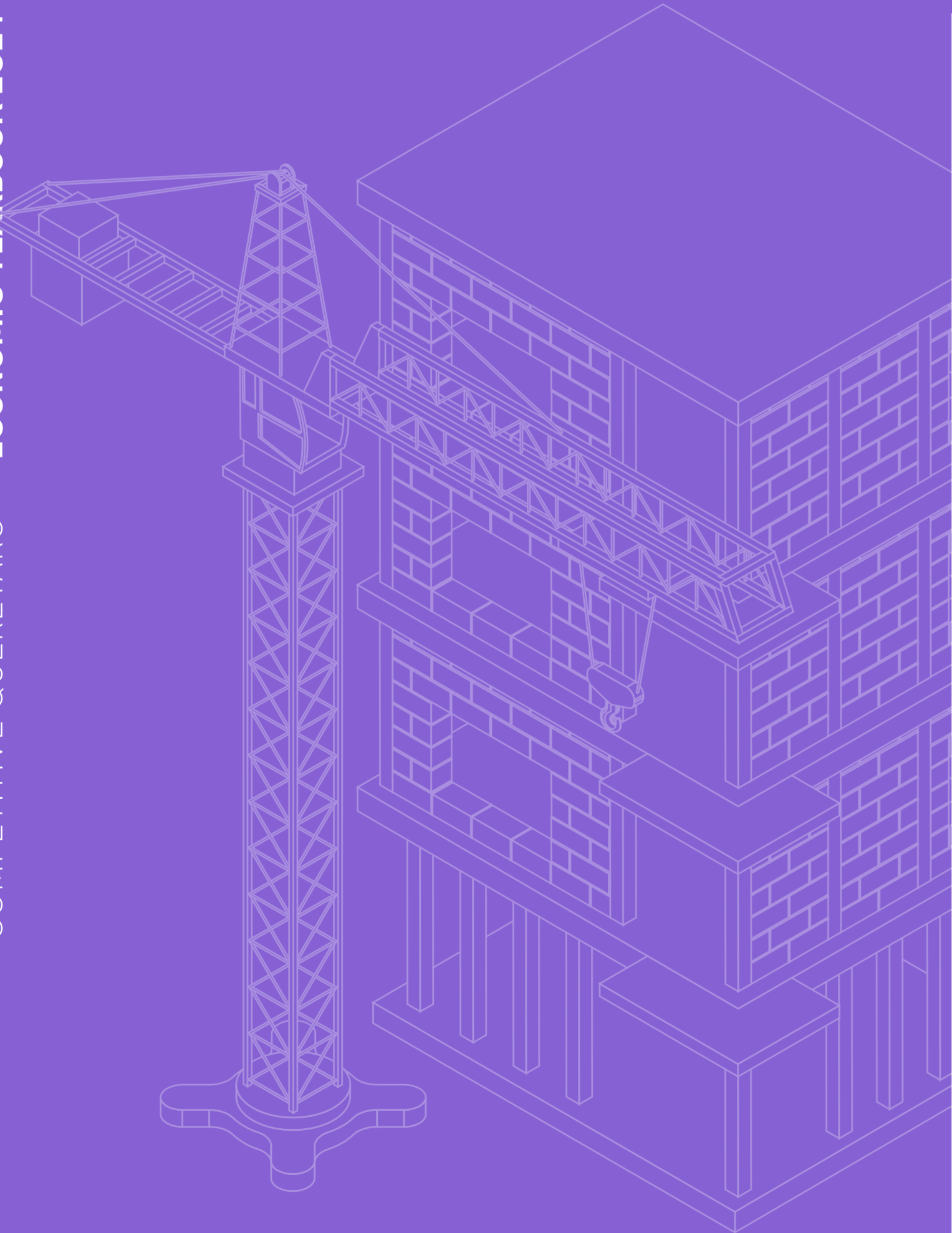
- 2.3.1 National Electric System
- 2.3.2 Domestic gas

### 2.4 Road and communications sector

- 2.4.1 Road infrastructure

### 2.5 Transportation and mobility

- 2.5.1 Railway infrastructure
- 2.5.2 Vehicle Verification Program
- 2.5.3 Querétaro International Airport (AIQ)
- 2.5.4 Querétaro Bus Terminal (TAQ)
- 2.5.5 Mobility





# INFRASTRUCTURE AND EQUIPMENT

140

INFRASTRUCTURE  
WORKS

24

DIRECT COMMERCIAL  
ROUTES FROM AIQ

344

PUBLIC TRANSPORTATION  
ROUTES

167,981,694 M<sup>3</sup>

DRINKING WATER PRODUCED BY  
THE STATE WATER COMMISSION

692,663

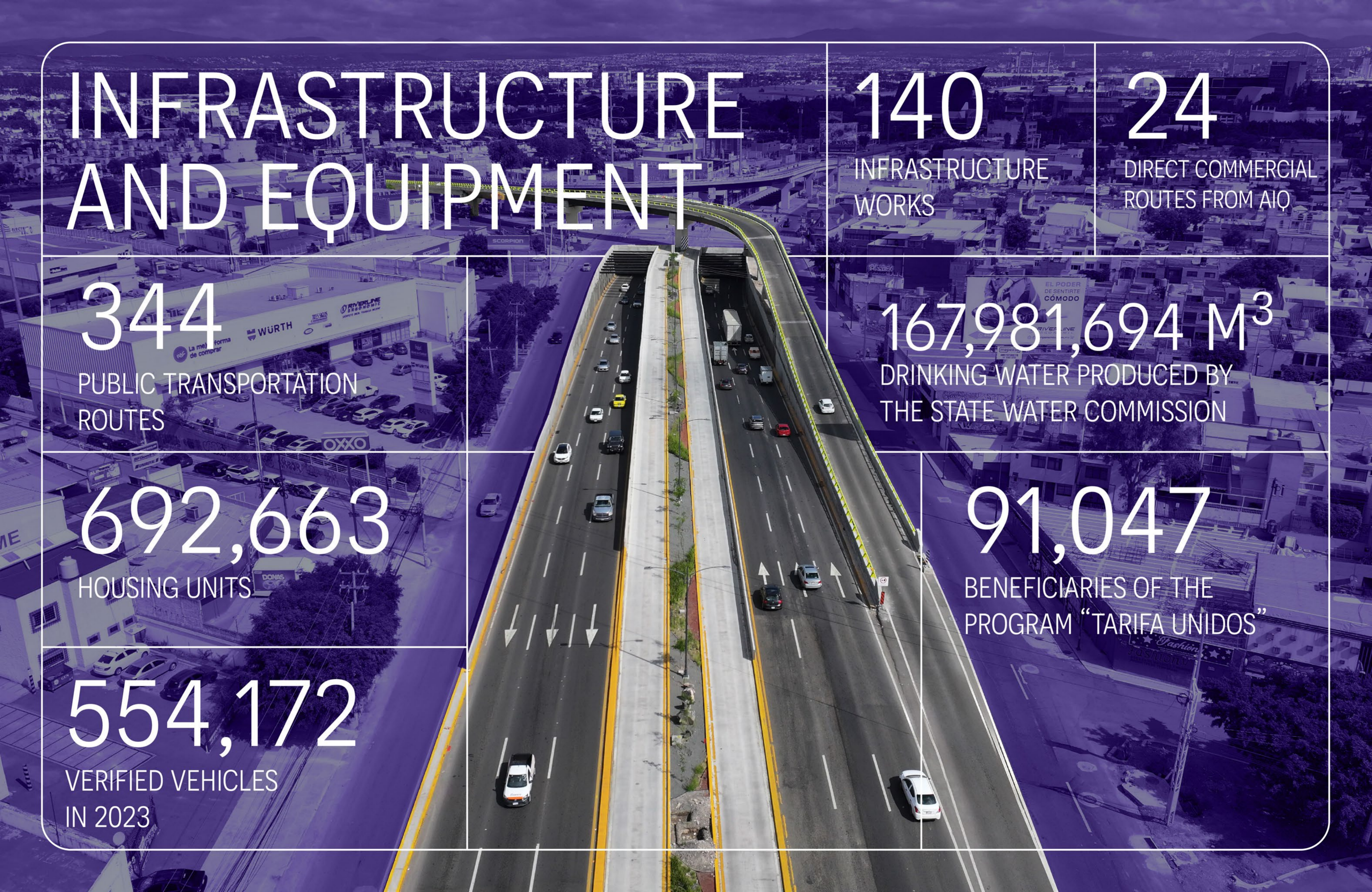
HOUSING UNITS

91,047

BENEFICIARIES OF THE  
PROGRAM "TARIFA UNIDOS"

554,172

VERIFIED VEHICLES  
IN 2023





## 2.1

# Urban development and housing

## 2.1.1

## Urban development

The Ministry of Urban Development and Public Works (SDUOP) promotes and supervises programs, projects and execution of community works in the state of Querétaro, in addition to regulating city growth and preserving the built cultural heritage, promoting the right to the city and an inclusive policy focused on people, through the guiding principles of universal accessibility, sustainable mobility and integral human development.

With the objective of having better roads, which will reduce travel times for citizens, as well as optimal infrastructure, in 2023, the SDUOP carried out several important works, among which the following stand out:

- ▶ **Municipality of Querétaro:**
  - ▶ Integral project Paseo 5 de febrero (2,300,000 beneficiaries)
  - ▶ Construction of the Courthouse (1,163,687 beneficiaries)
  - ▶ Comprehensive project for the construction of the new operational building for the State Police (2,368,467 beneficiaries)
- ▶ **Municipality of El Marqués:**
  - ▶ Modernization of state highway No. 540 from kilometer 17+260 to the junction with state highway No. 500 (1,597,941 beneficiaries).
- ▶ **Municipality of Jalpan de Serra:**
  - ▶ Conservation and restoration of the Mission of Santiago de Jalpan (59,279 beneficiaries).





### Urban development programs

During 2023, the following programs were developed:

- ▶ Ezequiel Montes Urban Development Municipal Program
- ▶ Cadereyta de Montes Municipal Program
- ▶ Amealco de Bonfil Municipal Program

In accordance with the provisions of Article 44 of the General Law of Human Settlements, Land Use Planning and Urban Development, the consistency opinions of the following programs were issued:

- ▶ Tolimán Urban Development Municipal Program
- ▶ Pedro Escobedo Urban Development Municipal Program
- ▶ Querétaro Urban Development Municipal Program
- ▶ San Juan del Río-Tequisquiapan Metropolitan Area Management Program



In addition, the following programs were registered in the Public Registry of Property of the State of Querétaro:

- ▶ Pedro Escobedo Urban Development Municipal Program
- ▶ Tequisquiapan Urban Development Municipal Program
- ▶ Tolimán Urban Development Municipal Program
- ▶ Querétaro Urban Development Municipal Program
- ▶ San Juan del Río-Tequisquiapan Metropolitan Area Management Program



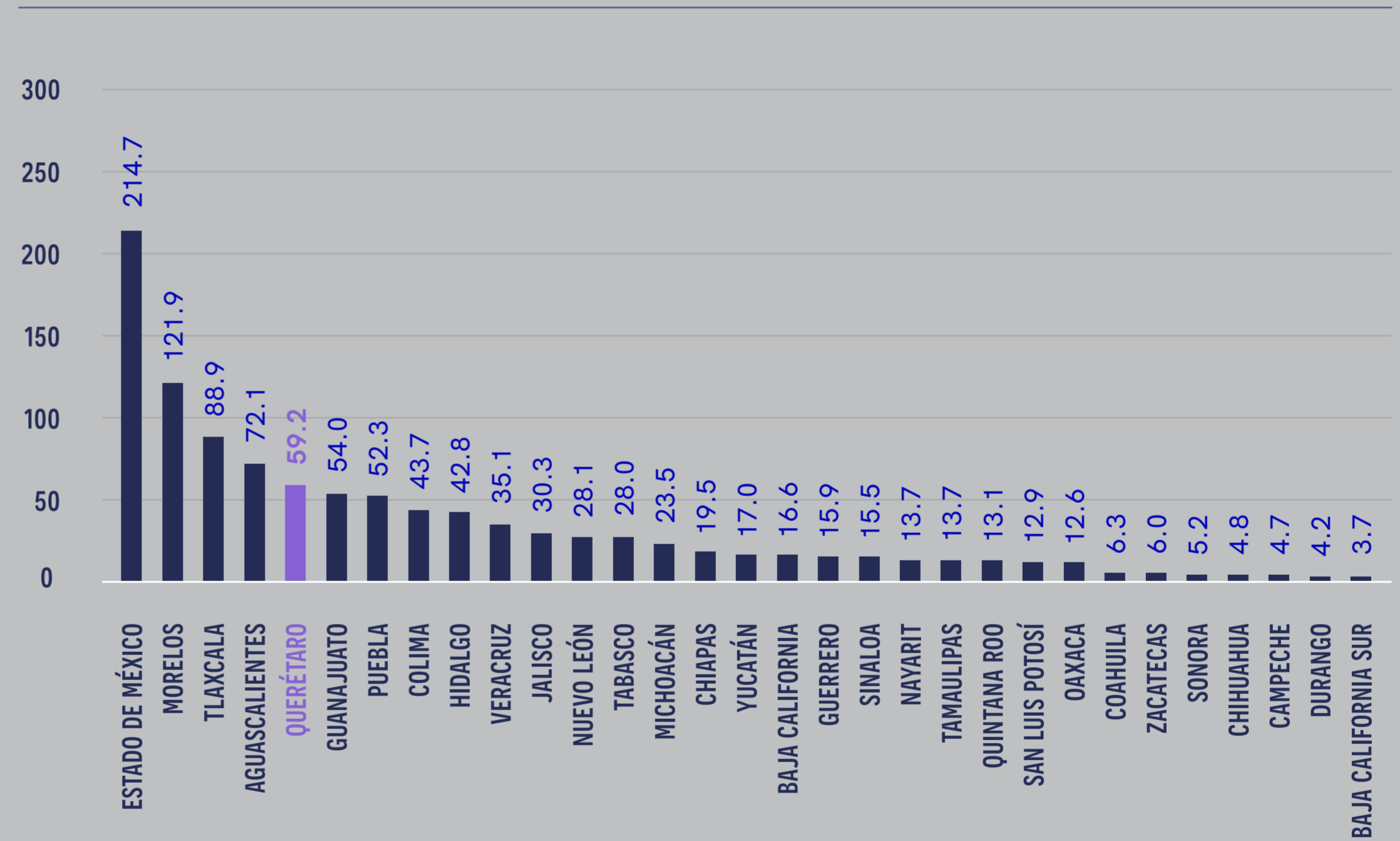


2.1.2

### Housing

In 2022, according to data obtained through the National Survey of Household Income and Expenditures (ENIGH), there were 36,968,871 households nationwide. Querétaro is positioned among the first places in terms of housing density, which could be explained by the arrival of people to the state, who demand a place to live.

Density of housing units by state (2022)



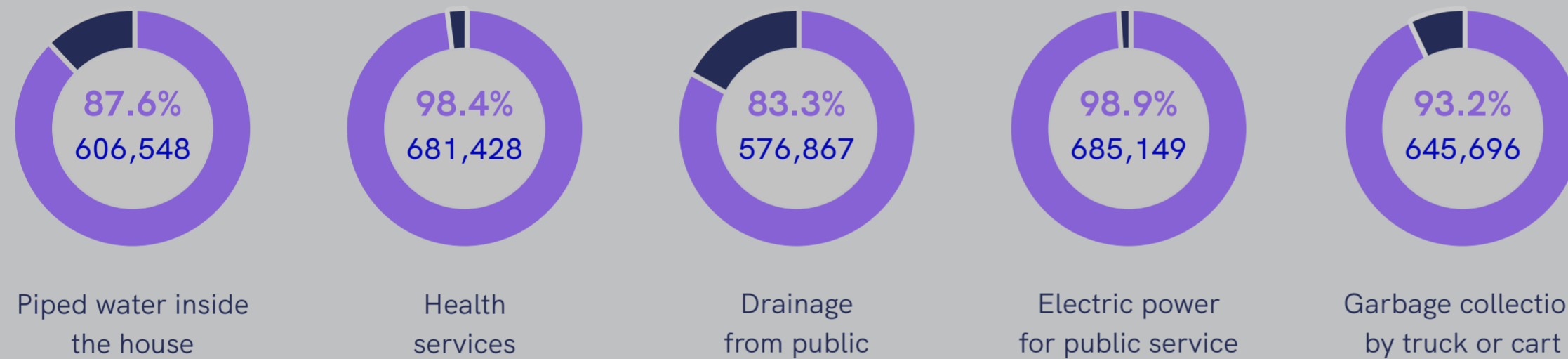
Source: Prepared by the authors with data from the National Institute of Statistics and Geography (National Survey of Household Income and Expenditures), 2024.

Note: The calculation was made considering the surface area in km<sup>2</sup>.

In order to better visualize the data, Ciudad de México, which has the highest housing density with 1,972.8 housing units, was not presented in the graph.



### Availability of services with respect to total housing units in Querétaro (2022)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (National Survey of Household Income and Expenditures), 2024.

Note: Absolute values refer to the total number of dwellings with the services listed.

In 2022, according to the ENIGH, there were 692,663 housing units in Querétaro, representing 1.9% of the national total. More than 80% of them had services that met the basic needs of the people living in them.

Of the total housing in the state, 63.5% corresponded to owned housing; 15.9% to rented; 9.6% to borrowed; 7.6% to owned housing, but they are paying for it; 2.7% to intestate or in litigation and 0.7% to another situation.

### Housing units by equipment in Querétaro (2022)

EQUIPMENT	ABSOLUTE	RELATIVE
Light meter	664,056	95.9%
Laundry	656,224	94.7%
Shower	600,277	86.7%
Water tank on roof	531,934	76.8%
Sink	489,491	70.7%
Gas heater or other	292,353	42.2%
Solar water heater	203,808	29.4%
Water pool, tank or reservoir	143,380	20.7%
Stationary gas tank	96,652	14%
Water pump	96,251	13.9%
Cistern or water tank	92,419	13.3%
Air conditioning	12,491	1.8%
Heating	6,833	1%
<b>Total housing</b>	<b>692,663</b>	<b>100%</b>

Source: Prepared by the authors with data from the National Institute of Statistics and Geography (National Survey of Household Income and Expenditures), 2024.

In addition to living in a house, having good equipment in the house dignifies people's lives and allows them to have better conditions for their development and coexistence.



## 2.2

# Hydraulic sector

## 2.2.1

## Hydraulic infrastructure of the State Water Commission (CEA)

In order to achieve an optimal supply of drinking water to the population of Querétaro, it is of great importance to have quality hydraulic infrastructure. In order to meet this objective, CEA places special emphasis on maintenance, as well as on continuous investment to expand the infrastructure network.

### Drinking water situation in Querétaro (2022-2023)

CATEGORY	UNIT	2022	2023
Treatment coverage	Percentage	59.6	54.8
Locations served	Unit	1,920	1,920
Sources of supply	Unit	300	301
Annual production volume	m <sup>3</sup>	167,441,961	167,981,694
Storage tanks	Unit	1,021	1,021
Daily storage capacity	m <sup>3</sup>	219,391	219,391
Drivelines	km	1,916	1,925
Distribution network	km	7,118	7,182
Contracted outlets	Unit	497,337	509,614

Source: Prepared by the State Water Commission (CEA), 2024.

### Sources of supply

These are the places or means through which the water supply for human, industrial and agricultural consumption is obtained. These sources consist mainly of wells, rivers, dams, springs and water-wheels. The state is supplied with drinking water by the State Water Commission (CEA).

CEA had a production of drinking water equivalent to 167,981,694 m<sup>3</sup> in 2023, where 25% of this total came from Aqueduct II, through 301 supply sources consisting mainly of wells.

### Storage tanks

In 2023, CEA had a total of 1,021 drinking water storage tanks, with a daily storage capacity of 219,391 m<sup>3</sup>, whose main function is to store, regulate and distribute water in a safe and efficient manner, aspects that guarantee that the needs of users are effectively met.

Of the total number of tanks in operation, 853 supplied the interior of the state, with the exception of San Juan del Río, reaching a daily storage capacity of 219,391 m<sup>3</sup>, while the remaining 168 tanks supplied the metropolitan area of the state.



### Pipeline and distribution networks

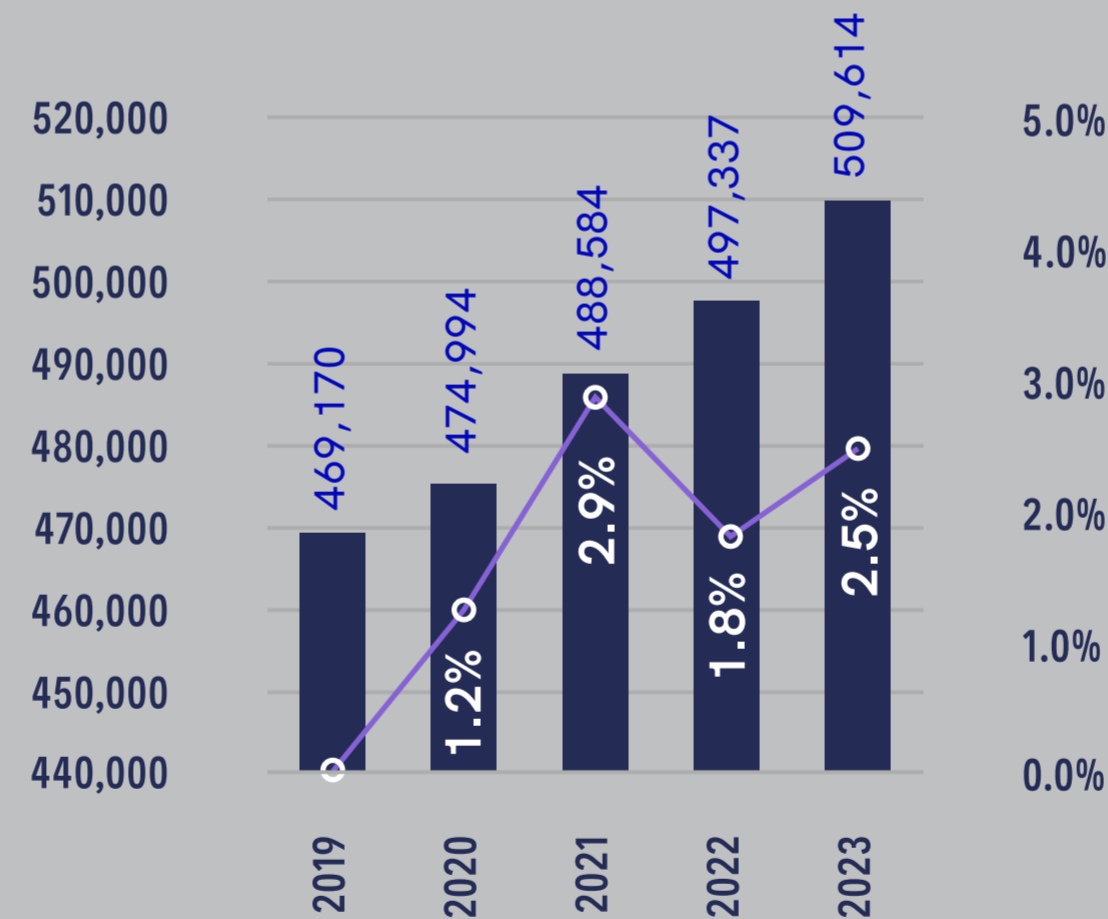
From 2022 to 2023, the CEA increased the length of drivelines by 0.5% and distribution lines by 0.9%, reaching 1,925 km in drivelines, 83.8% of which are located within the state, and 7,182 km in distribution networks. The increase in this infrastructure is important to guarantee the efficient supply of drinking water to the population of Querétaro.

### Contracted outlets

By the end of 2023, CEA reached a total of 509,614 taps installed with drinking water service, which represents an increase of 2.5% over 2022. Of the total, 94.9% corresponds to domestic taps, 0.1% to industrial taps, 4.1% to commercial taps and 0.9% to other types of taps.

### Querétaro contracted outlets (2019-2023)

Contracted outlets Var. % previous year



Source: Prepared by the authors with data from the State Water Commission, 2024.

Note: In 2019, the percentage variation is not reported, due to the fact that the number of outlets contracted for 2018 is not available.





### Water treatment plants

These are facilities designed to purify water and make it safe for human consumption; CEA has five water treatment plants that play a crucial role in supplying drinking water to communities, ensuring that it is safe and meets the quality standards established to protect public health.

Of the total installed capacity of CEA's water treatment plants, 92.7% corresponds to Acueducto II, located in the municipality of Cadereyta de Montes. It is worth mentioning that, in addition to the plants, CEA makes the water from the wells drinkable by means of on-site devices that guarantee 100% of the drinking water in totally healthy conditions.



Water treatment plants in operation in Querétaro (2022-2023)

MUNICIPALITY	WATER TREATMENT PLANTS	INSTALLED CAPACITY (LITERS PER SECOND)	ANNUAL VOLUME OF DRINKING WATER SUPPLIED (MILLIONS OF M <sup>3</sup> )	
			2022	2023
Cadereyta de Montes	Acueducto II	1,500	40.4	43.3
Jalpan de Serra	Jalpan and Tancoyol	70	1.3	1.8
Pinal de Amoles	Chujeje	25	1.1	1.3
San Joaquín	Aguacatillo	4.5	0.3	0.3
<b>Total</b>	<b>5</b>	<b>1,599.5</b>	<b>43.1</b>	<b>46.7</b>

Source: Prepared by the State Water Commission, 2024.





## 2.2.2

### Water Infrastructure Municipal Water and Sewerage Board (JAPAM)

JAPAM is a single decentralized agency in charge of managing and providing drinking water and sewerage services in the municipality of San Juan del Río. During its 31 years of service, it has provided sanitary drainage, sanitation and drinking water to 98% of the population, managing and operating 40 wells.

In 2023, the district had 1,331 km of distribution pipeline and 95,168 taps, which, in their commercial, domestic and industrial modalities, presented a variation with respect to 2022 of 3.3%, 1.5% and 121.6%, respectively.

There are 10 treatment plants in operation, serving 133,071 inhabitants, with an average treated flow of 29,300 m<sup>3</sup> per day. In 2023, JAPAM invested \$16,224,241.6 million pesos in its operation and maintenance.

In order to improve the service provided to the citizens, that same year, JAPAM carried out several actions in conjunction with the National Water Commission, among which the following stand out:

#### Drinking water situation in the municipality of San Juan del Río (2023)

CONCEPT	2023	VAR. % VS. 2022	
Pipelines	Of distribution (km)	1,331	0.5%
	Of conduction (km)	168	1.1%
Operating wells	40	0%	
Daily production (liters per second)	759.7	3.5%	
Average daily extraction volume (m <sup>3</sup> )		65,642.3	3.5%
	Commercial	4,530	3.3%
Outlets	Of construction	162	128.2%
	Of municipal dependency	92	3.4%
	Domestic	87,071	1.5%
	Livestock	2	0%
	Industrial	370	121.6%
	Mixed	2,941	1.4%

Source: Prepared by the Municipal Drinking Water and Sewerage Board, 2024.

- ▶ Expansion of 3.4 km of sanitary sewer coverage, with an investment of MXN \$9.7 MM.
- ▶ Expansion of 4.2 km of drinking water supply and distribution pipeline, with an investment of \$ MXN 7.4 MM.
- ▶ Construction of a 1,500 m<sup>3</sup> storage tank to strengthen JAPAM's operational drinking water system, with an investment of MXN \$18.1 MM.
- ▶ Replacement of 1.4 km of drinking water conduction, supply and distribution lines, with an investment of MXN \$1.5 MM.
- ▶ Supply and installation of 5,113 micro-meters, with an investment of \$6.96 million pesos, to indirectly improve the continuity and quantity of drinking water service, promote savings and optimization of drinking water service through greater control of the population's consumption and achieve a reduction in the operating agency's commercial loss rate.



## Interactive Museum of Water Culture (MICA)

Its objective is to disseminate information about the culture of water care, in order to avoid its pollution and waste, strengthening the reflection with educational activities and digital entertainment. It is the only Interactive Museum with a water care theme in the state of Querétaro and the third in the country.

During 2023, the museum registered 22,269 physical visitors and 3,062 virtual visitors through its online page. On the other hand, a maintenance investment of \$125,370 was made.

As part of the promotion of water culture, \$1,665,000 was invested to carry out actions that will have a positive impact on water culture.



One of them was the campaign for the care and support of water resources and biodiversity “Aguas con el agua” (Care the water), which was carried out in conjunction with the National Water Commission. Through this, the new ECA

was installed to strengthen the new eco-techniques that help the water resource, being the first to be executed by a government agency or dependency.



## 2.3

# Energy

## 2.3.1

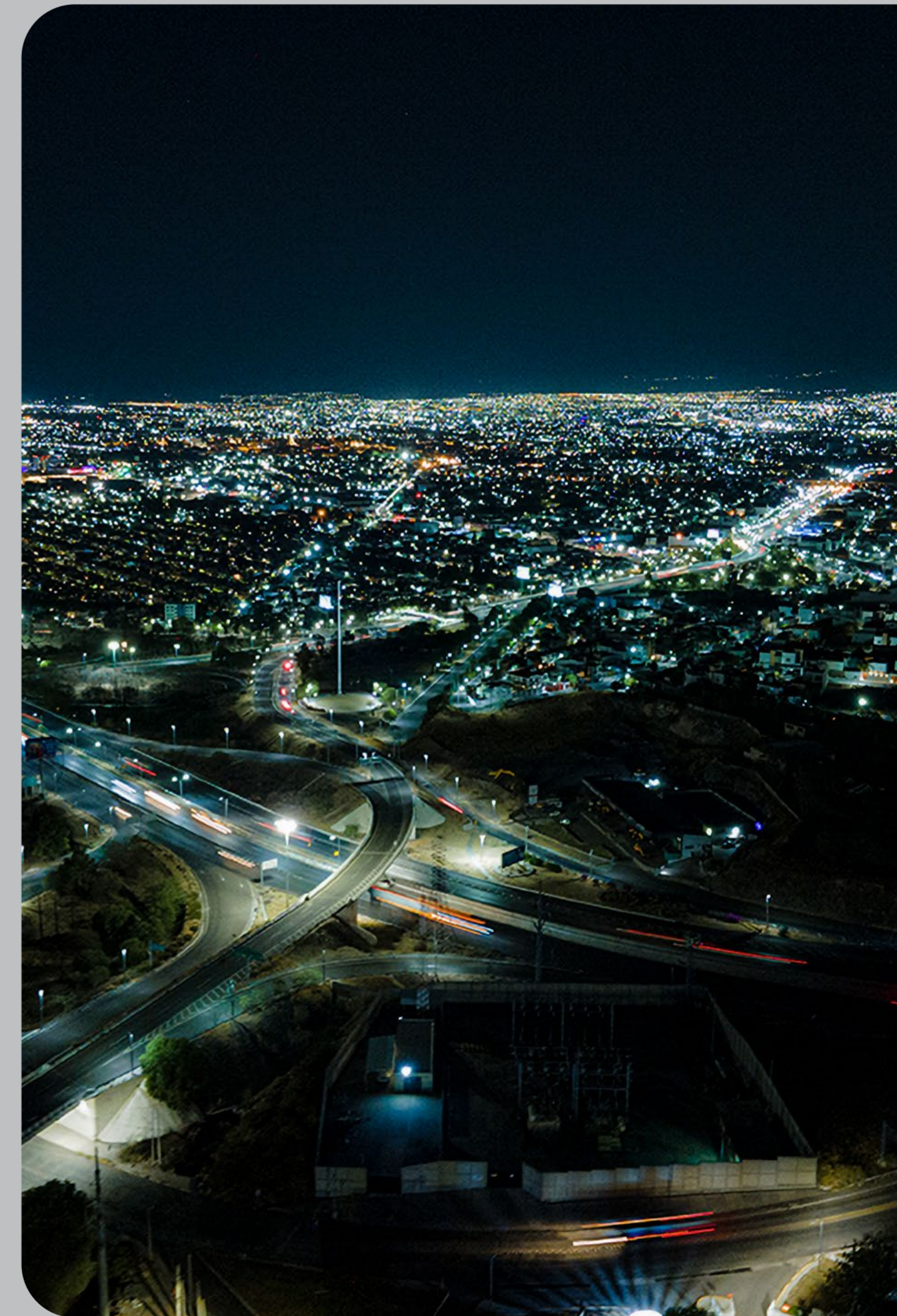
## National Electric System

The National Electric System is comprised of the National Transmission Network (RNT); the General Distribution Networks (RGD); the Power Plants that deliver electric power to the RNT or the RGD; and CENACE's equipment and facilities used to carry out the operational control of the SEN:

- ▶ **National Transmission Network (RNT).** System comprising the electrical networks used to transport energy to the DGRs and end users (includes voltages equal to or greater than 69 kV).
- ▶ **General Distribution Networks (RGD).** They are used to distribute electric power to the general public (medium voltage networks with levels higher than 1kV and lower than 69 kV; low voltage networks with levels equal to or lower than 1kV).

The National Energy Control Center (CENACE) is a decentralized public body that exercises operational oversight of the National Electric System (SEN), keeps the Wholesale Electricity Market active and guarantees fairness in access to the National Transmission Network and the General Distribution Networks.

The Federal Electricity Commission is an important body for the generation and supply of energy in the country.





## Federal Electricity Commission (CFE)

Created on August 14, 1937, the CFE is a public company that provides electric energy to the country, it is a state-owned productive enterprise, with its own assets and legal personality. It currently has 194 power plants, a transmission network of 110.6 thousand kilometers, and a distribution network of 894.2 thousand kilometers.

In 2023, CFE's revenues were MXN \$639,844 MM, 3.1% higher than in 2022, due to a higher volume of energy sales of 8,660 GWh.

According to the Investment Program, an investment is considered to be distributed from 2023 to 2029, accumulating an amount of MXN \$536,326 MM. In 2023, the amount invested was MXN \$90,059 MM, distributed as follows: MXN \$48,010 MM for generation; MXN \$21,201 MM for transmission; MXN \$8,431 MM for distribution; and MXN \$12,417 MM for others.

## Electric power generation

At the end of 2023, the installed generation capacity of the CFE together with the Independent Power Producers (IPPs) was 61,449 MW, 2.6% higher than the figure reported for 2022. Fossil fuels accounted for 84.8% of its total generation, while 15.2% came from clean energies.

## Transmission

The CFE maintains exclusivity in transmission activities in Mexico, the CFE network considers voltage levels between 69 and 400 kV, with a length of 110,558.44 kilometers.

## Distribution

The networks consist of medium-voltage networks with levels between 2.4 and 34.5 kV, as well as low-voltage networks with levels from 110 to 220 V. At the end of 2023, the length of the distribution networks was approximately 894,206 km.

## Coverage

In 2023, 48.2 million customers were served. The CFE estimates that more than 99.3% of the country's population has access to electricity; distribution channels reach more than 160 thousand localities.

## Jobs in the energy sector

According to the Mexican Social Security Institute, at the end of 2023, the generation, transmission and distribution of electricity registered 1,522 people, which represents a participation of 0.2% of the total number of workers in the state, with 26.1% (398) women and 73.9% (1,124) men.

Of the total number of jobs in this sector nationwide (97,497), Querétaro represents 1.6%.

The average salary by gender is \$1,090.8 for women and \$1,237 for men.



### 2.3.2

## Domestic gas

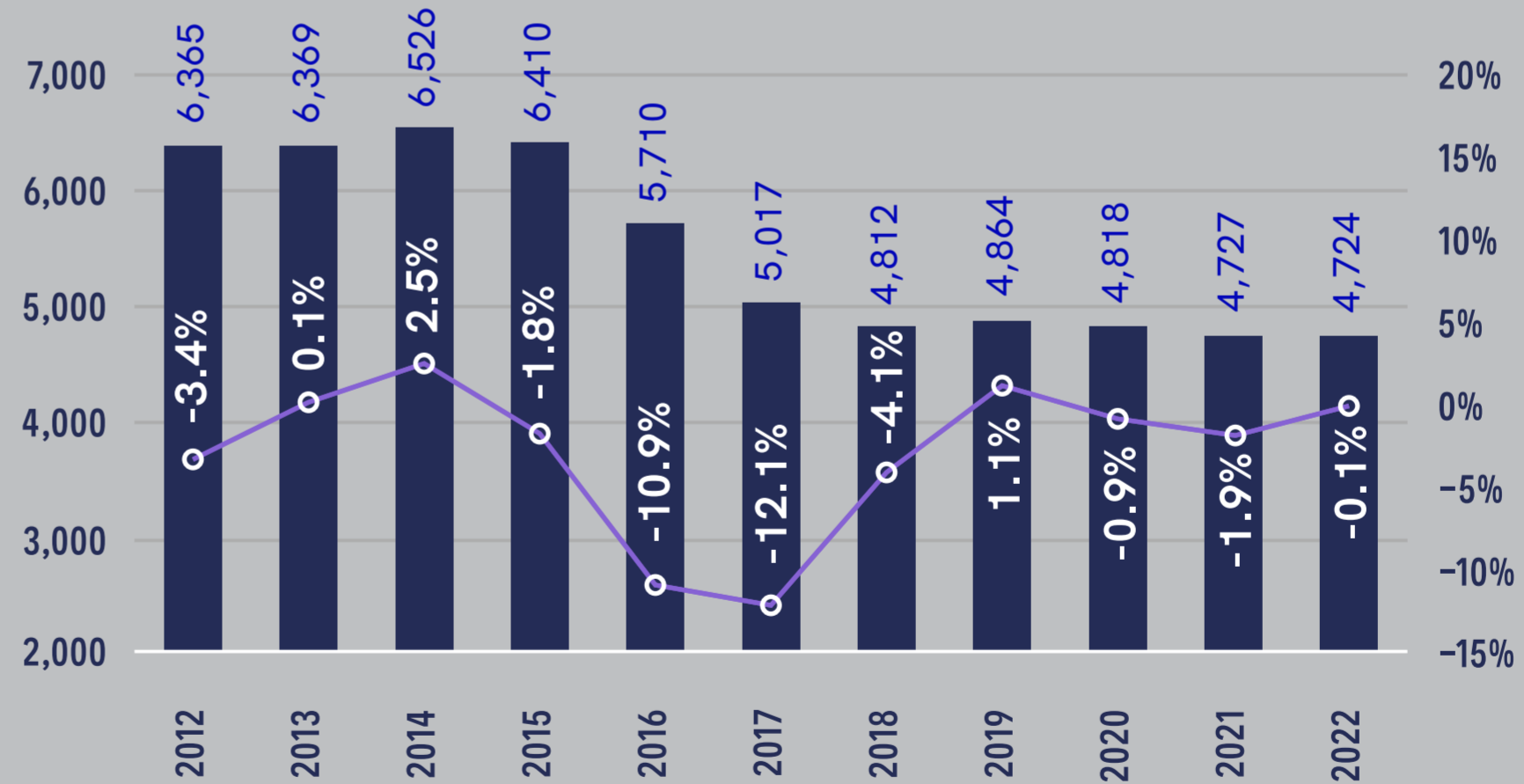
According to the National Hydrocarbons Commission, governments and international communities are increasingly concerned about the effects of climate change, which is why the transition to renewable energies and natural gas is increasing day by day. This resource plays a fundamental role as it constitutes an abundant and competitive primary energy source.

## Domestic gas production

With figures reported by the National Council of Humanities, Sciences and Technologies (CONAHCYT) during 2022, gas production was 4,724 billion cubic feet per day, however, production is on the decline. Of the total, 55.4% was marine production and 44.6% was land production.

### Domestic gas production (2012-2022)

Production    Var. % previous year



Source: Prepared by the authors with data from the National Council of Humanities, Sciences and Technologies (Gas production), 2024.  
Note: Figures are expressed in billions of cubic feet.



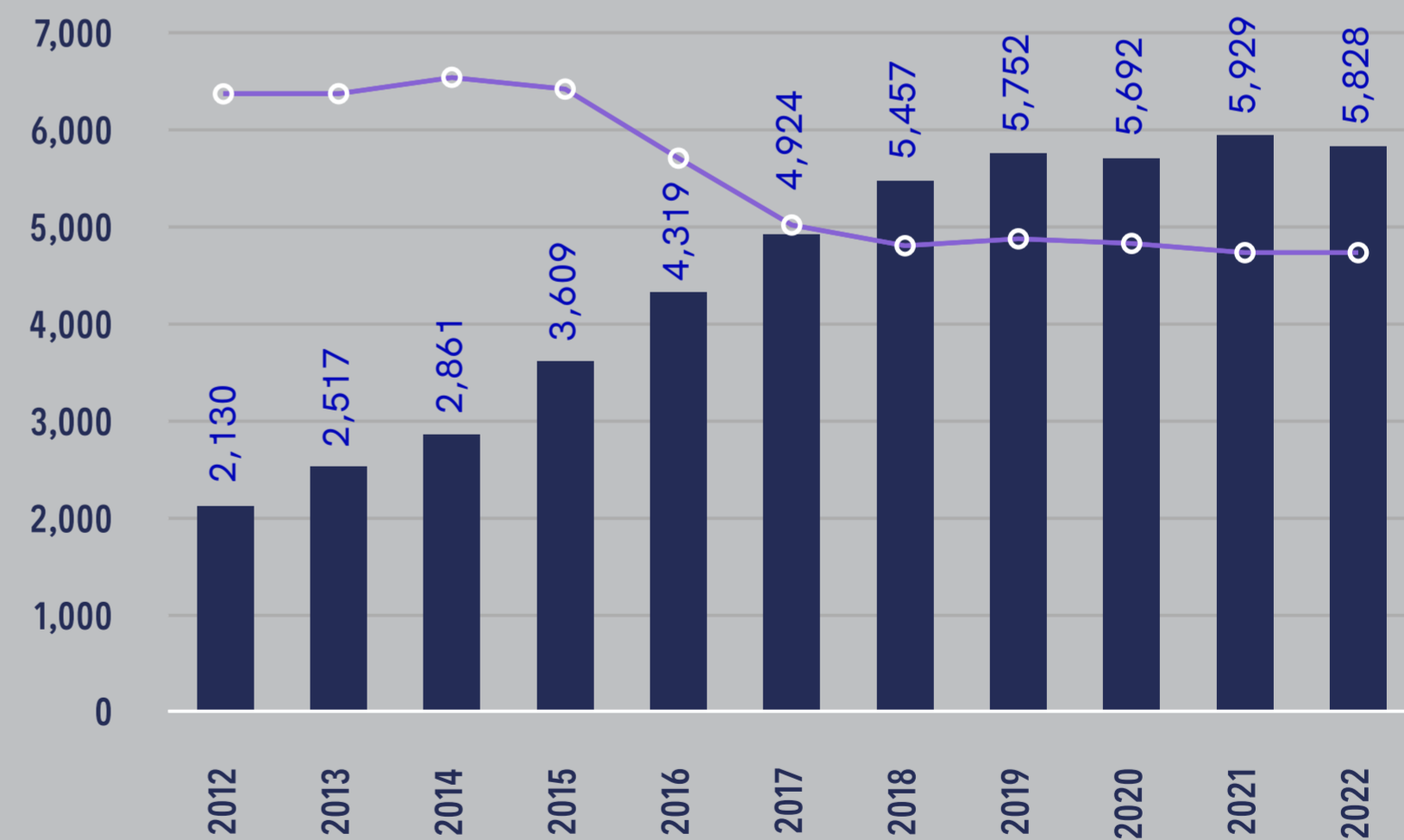
## Total gas imports

In recent years, natural gas imports have exceeded the volume of domestic production; during 2022, total gas imports stood at 5,828 billion cubic feet per day. 72% of the total demand for natural gas consumed in the country is met by imports.

## Total imports and domestic production (2012-2022)

Total imports

National production



Source: Prepared by the authors with data from the National Council of Humanities, Sciences and Technologies (Natural gas imports), 2024.

Note: Figures are expressed in billions of cubic feet.



## 2.4

# Road and communications sector

The State Infrastructure Commission (CEI) has the objective of providing the population with highways, roads, streets and infrastructure through the planning and execution of public works, maintenance and conservation.

Throughout 2023, CEI carried out 140 infrastructure works throughout the state, a figure that was close to doubling the number of works carried out during 2022, which were 73; for the current year, the following stand out:

- ▶ Modernization and widening of 3.4 km of State Highway 540 Querétaro-Chichimequillas, from the bridge that crosses the San Luis Potosí beltway to the vicinity of the town of Santa María Begoña, in the municipality of El Marqués. The work, with an investment of more than 130 million pesos, included the widening from two to four lanes, sidewalks, bicycle lanes, the widening of the vehicular bridge at the intersection with the federal highway and a new bridge over the Querétaro River, which will speed up the traffic of more than 9,200 vehicles that circulate daily in this area.
- ▶ Modernization of the road from the town of Cerro Gordo to El Sitio, in the municipality of San Juan del Río; 19 million pesos were invested to benefit more than 144,000 inhabitants of the region. This road was widened from two to four lanes, sidewalks were built, street lighting was installed, pluvial drainage was implemented and road signs were installed.
- ▶ Modernization with hydraulic concrete of the roads between the towns of El Lindero and La Tinaja in Arroyo Seco; Derramadero and Bucareli in Pinal de Amoles; and the access road to the town of El Rayo, which is part of the municipalities of Arroyo Seco and Jalpan de Serra. More than 20.2 million pesos were invested in the modernization of these roads.
- ▶ The execution of social works in more than 80 neighborhoods and localities in the state, with an investment of more than 690 million pesos. These works included the replacement of more than 51 km of drinking water, drainage and rainwater infrastructure networks, as well as the modernization of pavements on more than 39 km of streets and roads.

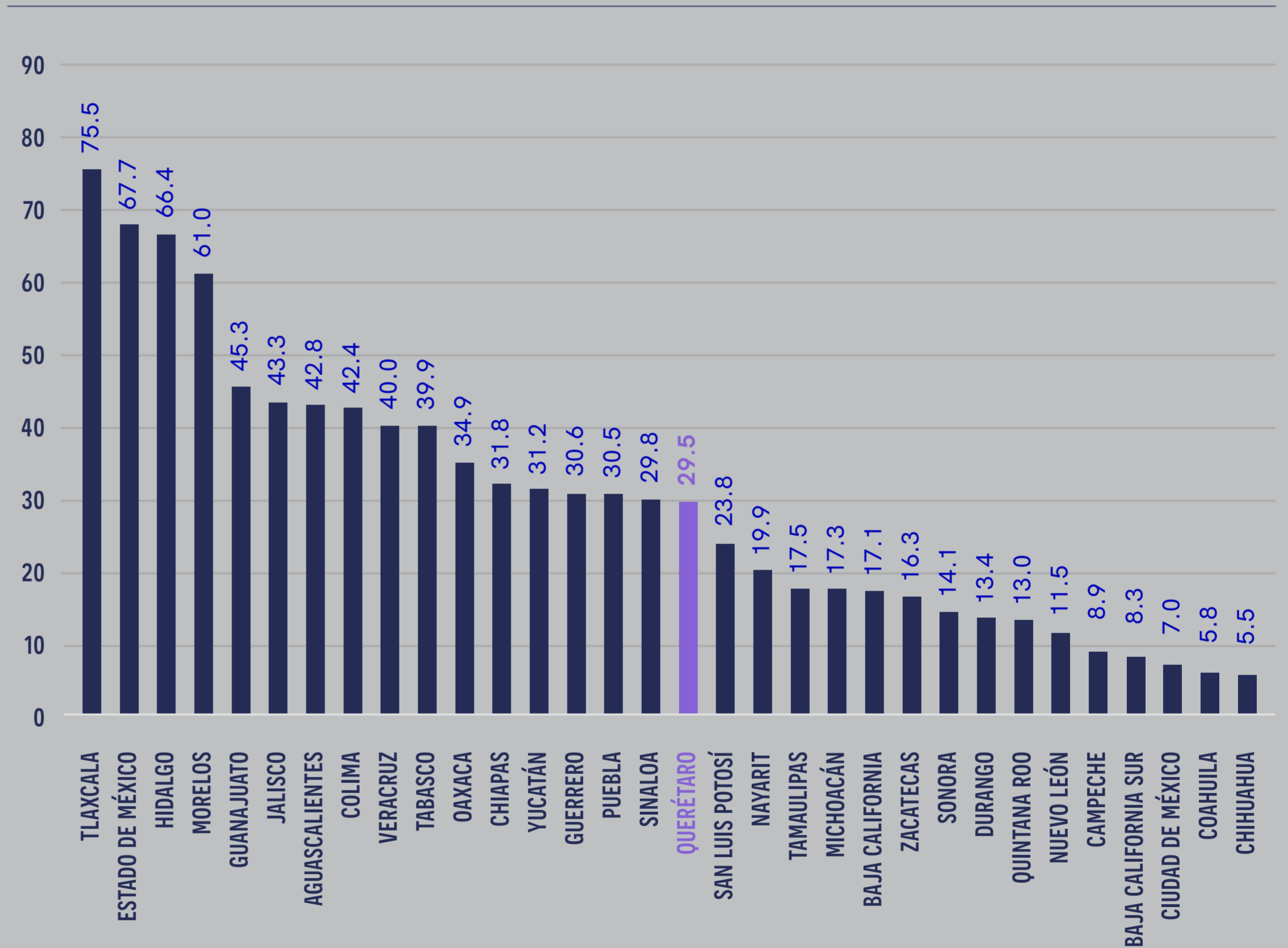


### 2.4.1

## Road infrastructure

In 2022, according to the Statistical Yearbook of the Infrastructure, Communications and Transportation Sector, published by the Ministry of Infrastructure, Communications and Transportation, there is a total of 402,622 km of National Road Network nationwide, Querétaro concentrates 0.9%, or 3,451 km.

National Highway Network with respect to the total surface area by state (2022)



Source: Prepared by the authors with data from the Ministry of Communications and Transportation (Statistical Yearbook of the Infrastructure, Communications and Transportation sector 2022), 2024.





Querétaro is located on the axis that connects the metropolitan area of the Valley of Mexico with Nuevo Laredo and Ciudad Juárez; both highways are important for national communication.

The highway infrastructure makes the state a point of interconnection and distribution of private, tourist and cargo traffic to various destinations in the country. Vehicles from three strategic regions of the Mexican Republic circulate through the Querétaro network: the metropolitan area of the Valley of Mexico; the northern area, comprising San Luis Potosí and Nuevo León; and the western area.

The state highway network is distributed throughout the different regions of the state, with the central region accounting for 40.2%, followed by the semi-desert with 23.9%.



Distribution of the state highway network by region (2023)

REGION	ROAD KILOMETERS
Center	483.4
South	249.0
Sierra Gorda	169.1
Semidesert	287.0
<b>Total</b>	<b>1,187.4</b>

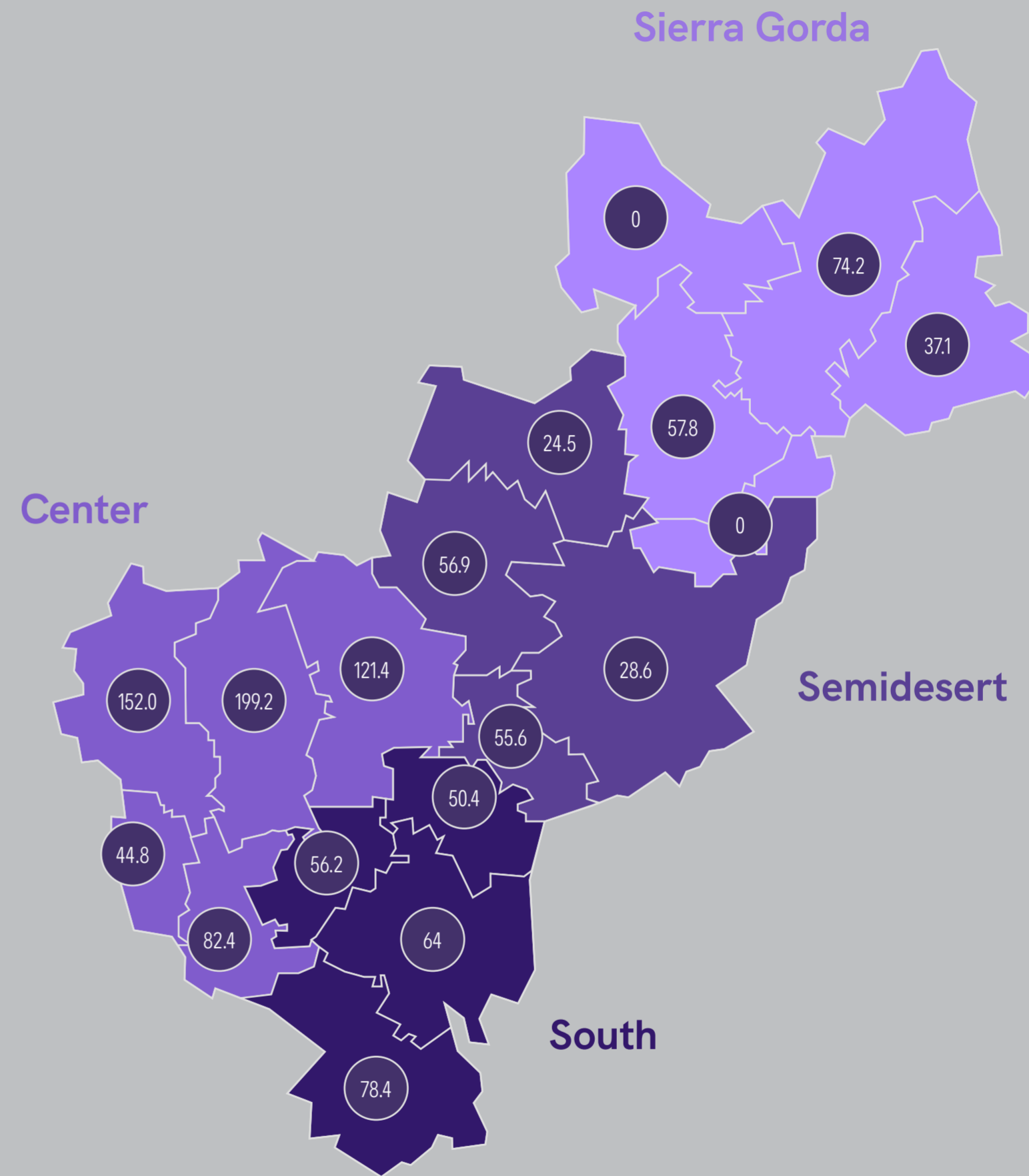
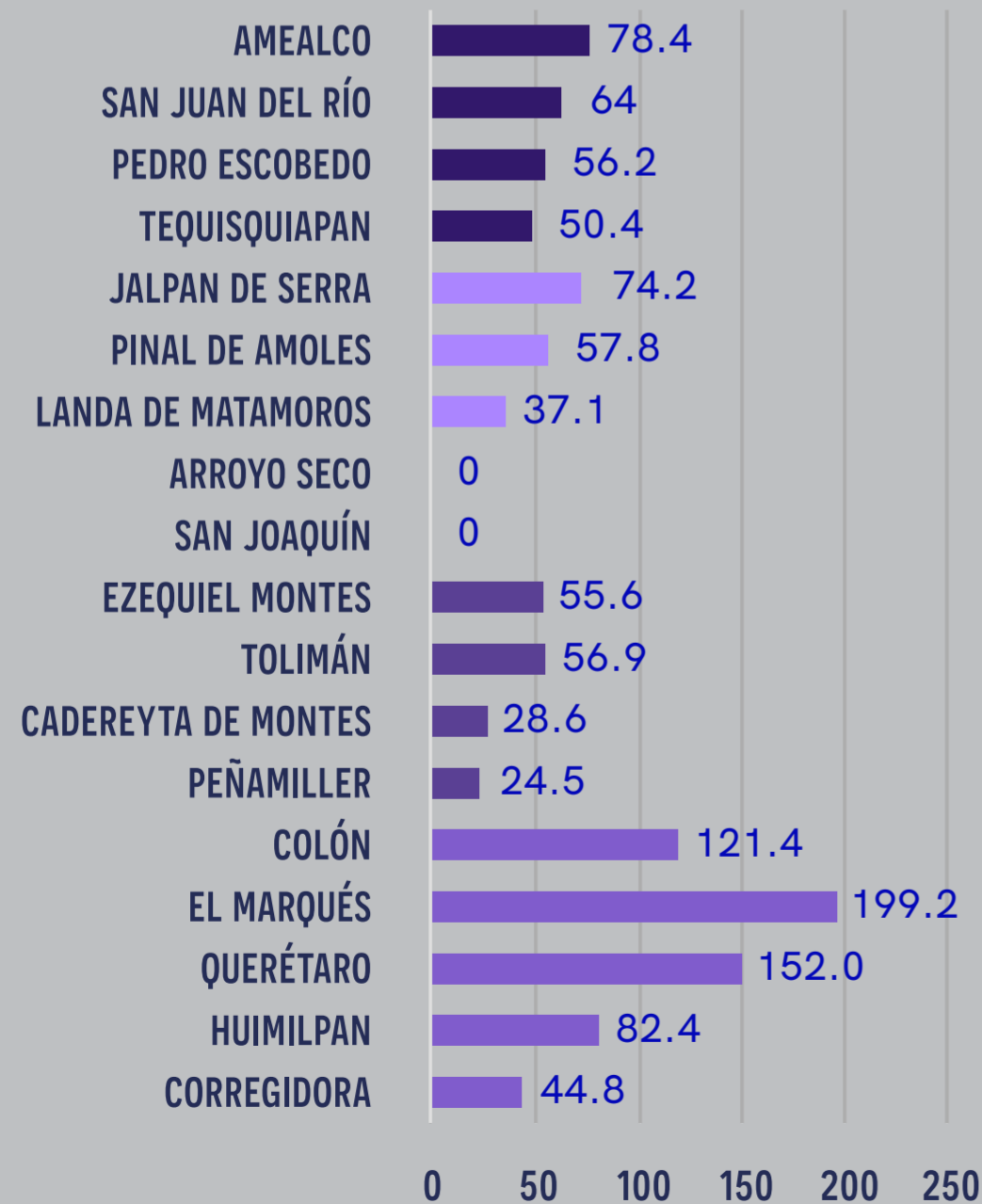
Source: Prepared by the State Infrastructure Commission, 2024. Sierra Gorda areas: Pinal de Amoles, Arroyo Seco, Jalpan de Serra, Landa de Matamoros and San Joaquín; Semidesert: Cadereyta de Montes, Ezequiel Montes, Peñamiller and Tolimán; Center: Colón, Corregidora, Huimilpan, El Marqués and Querétaro; South: Amealco de Bonfil, Pedro Escobedo, San Juan del Río and Tequisquiapan.



The municipality of El Marqués tops the list of municipalities with the greatest extension of highways, followed by Querétaro, both belonging to the central region.

## Road infrastructure by municipality in Querétaro (2023)

South Sierra Gorda Semidesert Center



Source: Own preparation with information from the State Infrastructure Commission, 2024.  
Note: Figures are expressed in kilometers.  
Arroyo Seco belongs to the Sierra Gorda zone and San Joaquín to the semidesert.



## 2.5

# Transportation and mobility

## 2.5.1

## Railway infrastructure

The Railway Transportation Regulatory Agency promotes a safe, efficient and competitive system, carrying out regulatory, verification and surveillance activities for the operation, exploitation, construction, conservation and maintenance of the infrastructure, as well as the sector's public transportation service.

With data reported as of May 2023, Mexico's railroad infrastructure consisted of 23,731 kilometers of track in operation, distributed as follows: 17,643 km on concessioned main track, 4,533 km on secondary track and 1,555 km on private tracks.

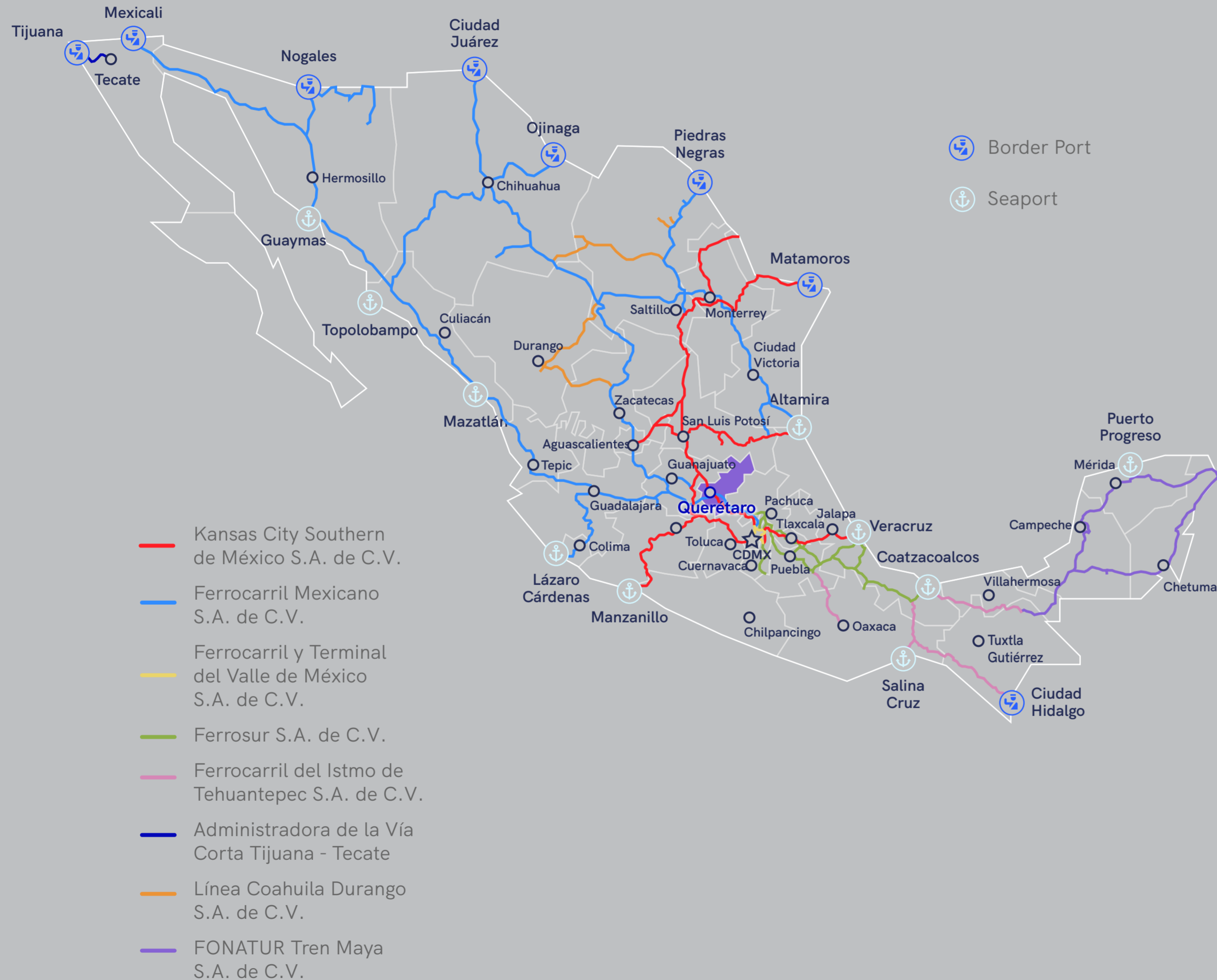


Currently, the concessionaires and assignees that provide freight transportation services in the Mexican Railroad System (SFM) are:

- ▶ Kansas City Southern de México, S.A. de C.V. (KCSM).
- ▶ Ferrocarril Mexicano, S. A. de C. V. (FERROMEX).
- ▶ Ferrocarril del Istmo de Tehuantepec, S. A. de C. V. (FIT).
- ▶ Ferrosur, S. A. de C. V. (FERROSUR).
- ▶ Ferrocarril y Terminal del Valle de México S. A. de C. V. (FERROVALLE).
- ▶ Línea Coahuila Durango, S. A. de C. V. (COAHUILA-DURANGO).
- ▶ Administradora de la Vía Corta Tijuana-Teacate, S. A. de C. V. (ADMICARGA).



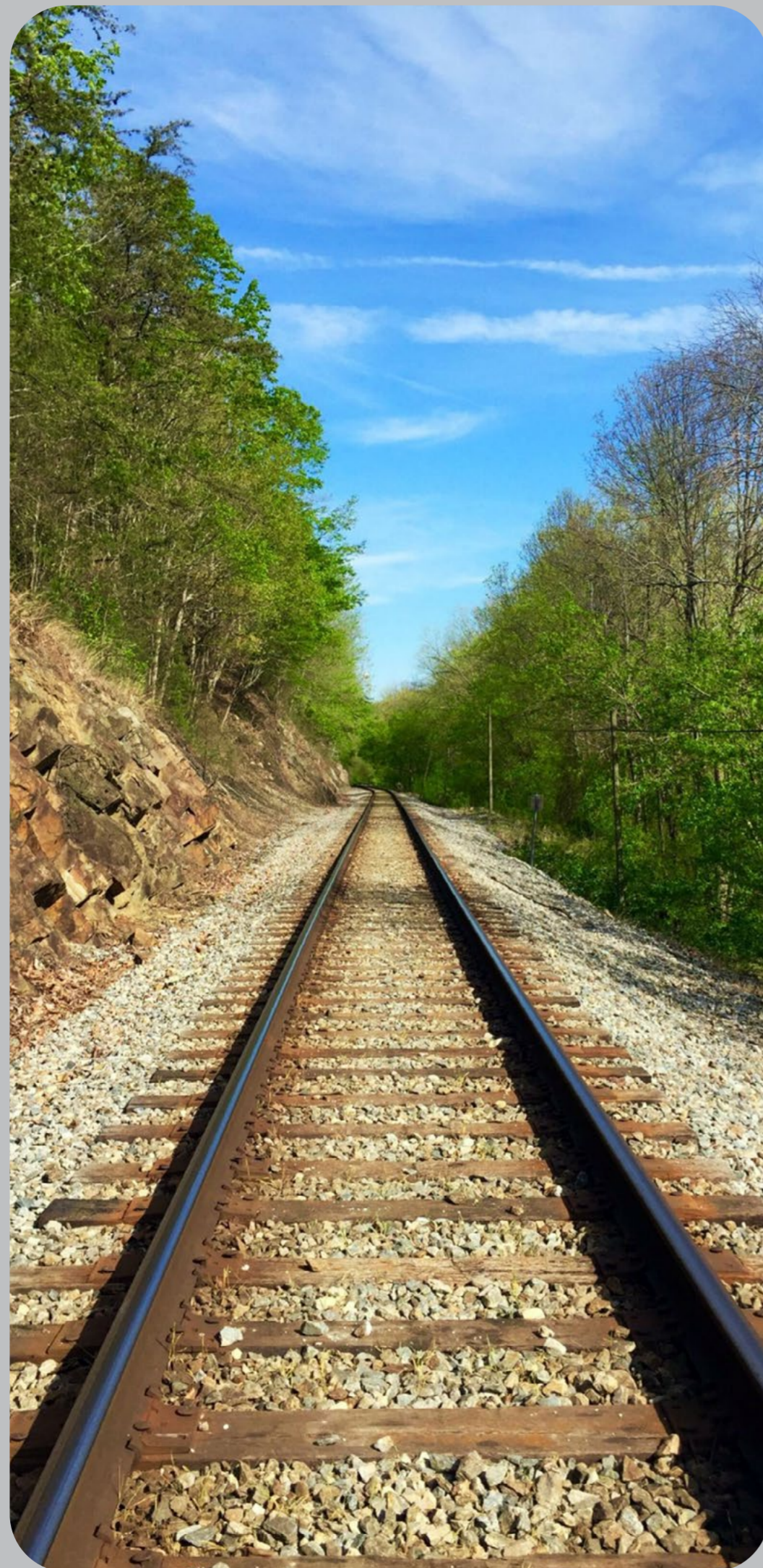
Railway infrastructure



While those that provide passenger service are:

- ▶ Suburban Railroad of the Metropolitan Area of the Valley of Mexico.
- ▶ Puebla-Cholula Tourist Railroad.
- ▶ Chihuahua-Pacific Railroad.
- ▶ Tequila Express Railroad.
- ▶ Tijuana-Tecate Short Track Railroad.

FONATUR Tren Maya S.A. de C.V. has a mixed assignment for the provision of public freight and passenger railroad transportation services, as well as the Infrastructure National Fund, which has an assignment for the provision of intercity public passenger transportation services on the Mexico-Toluca route.



### Freight transportation

According to the Pulse of the Mexican Railroad System, during 2023 the SFM mobilized 2.1 million loaded cars, moving 131.5 million net tons, 2.4% higher than the figure reported in 2022.

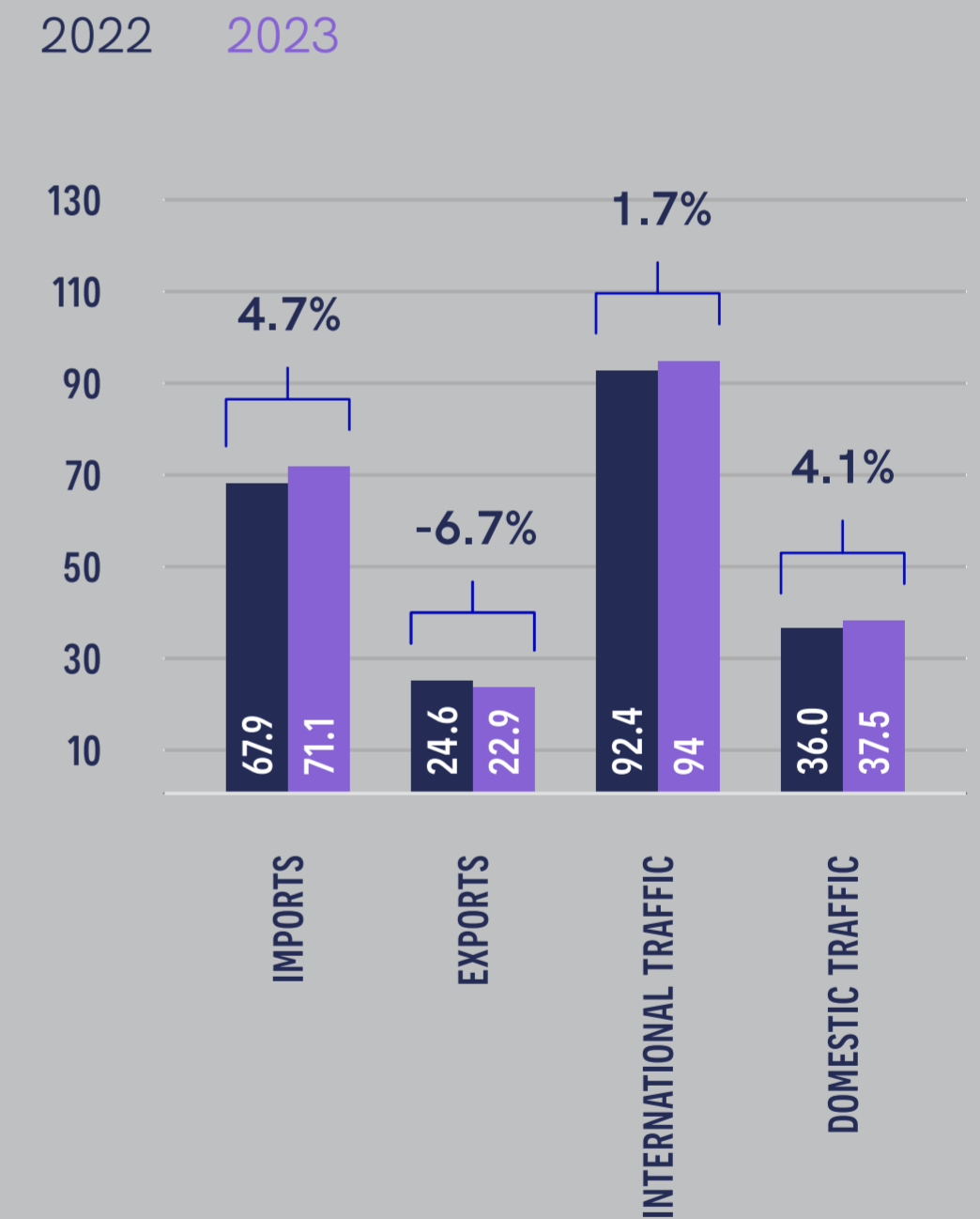
### Cargo transported in the Mexican Railroad System (2022-2023)

CONCEPT	2022	2023	VAR. %
Loaded cars (millions)	2.03	2.10	3.4%
Net tons (millions)	128.5	131.5	2.4%
Tons-kilometers (millions)	87,071.3	92,132.2	5.8%
Average distance (km)	677.8	700.8	3.4%

Source: Own preparation with information from Railway Transportation Regulatory Agency (Mexican Railroad System Pulse), 2024.

From January to December 2023, 37.5 million tons corresponding to domestic traffic and 94 million tons corresponding to international traffic were transported, of which 71.1 million tons were imports and 22.9 million tons were exports.

### Foreign trade cargo movement in the Mexican Railroad System (2022-2023)



Source: Own preparation with information from Railway Transportation Regulatory Agency (Mexican Railroad System Pulse), 2024.  
Note: Figures are expressed in millions of tons.



Regarding the 131.5 million tons transported during 2023, industrial products accounted for 48.5% of the same, followed by agricultural products with 35.2%.

### Cargo transported by product group in the Mexican Railroad System (2022-2023)

PRODUCT GROUP	2022	2023	VAR. %
Agricultural	34.0	35.2	3.4%
Animal by-products	0.3	0.3	-6.7%
Forestry	1.1	1.1	-1.8%
Industrial	60.0	63.8	6.3%
Inorganic	5.9	6.0	2.2%
Minerals	12.3	9.1	-25.7%
Oil and petroleum products	14.9	16.0	7.6%
<b>Total</b>	<b>128.5</b>	<b>131.5</b>	<b>2.4%</b>

Source: Own preparation with information from Railway Transportation Regulatory Agency (Mexican Railroad System Pulse), 2024.

Note: Figures are expressed in millions of tons.

### Passenger transportation

Although there are few trains for passenger transportation, it is of great importance, mainly for the movement of people, as well as for tourism.

During 2023, the number of passengers transported amounted to 45.8 million, 99.6% of which were regular suburban passengers and 0.4% tourist passengers.

### Passengers transported in the Mexican Railroad System (2022-2023)

SYSTEM	2022	2023	VAR. %
Other modalities	0.16	0.17	6.3%
Suburban	40.9	45.7	11.8%
<b>Total</b>	<b>41.0</b>	<b>45.8</b>	<b>11.8%</b>

Source: Own preparation with information from Railway Transportation Regulatory Agency (Mexican Railroad System Pulse), 2024.

Note: Figures are expressed in millions of passengers.

### Railroad infrastructure in Querétaro

Querétaro has a location, as well as a railroad infrastructure that is considered important for the transportation of cargo, mainly to the north of the country.

The state's railroad infrastructure is comprised of 510.8 kilometers of track in operation, distributed as follows: 354 km of concessioned main track, 90.6 km of secondary track and 66.2 km of private track.

Currently, the concessionaires and assignees that provide freight transportation services in the Mexican Railroad System (SFM) in the state are:

- ▶ Kansas City Southern de México, S.A. de C.V. (KCSM).
- ▶ Ferrocarril Mexicano, S. A. de C. V. (FERROMEX).



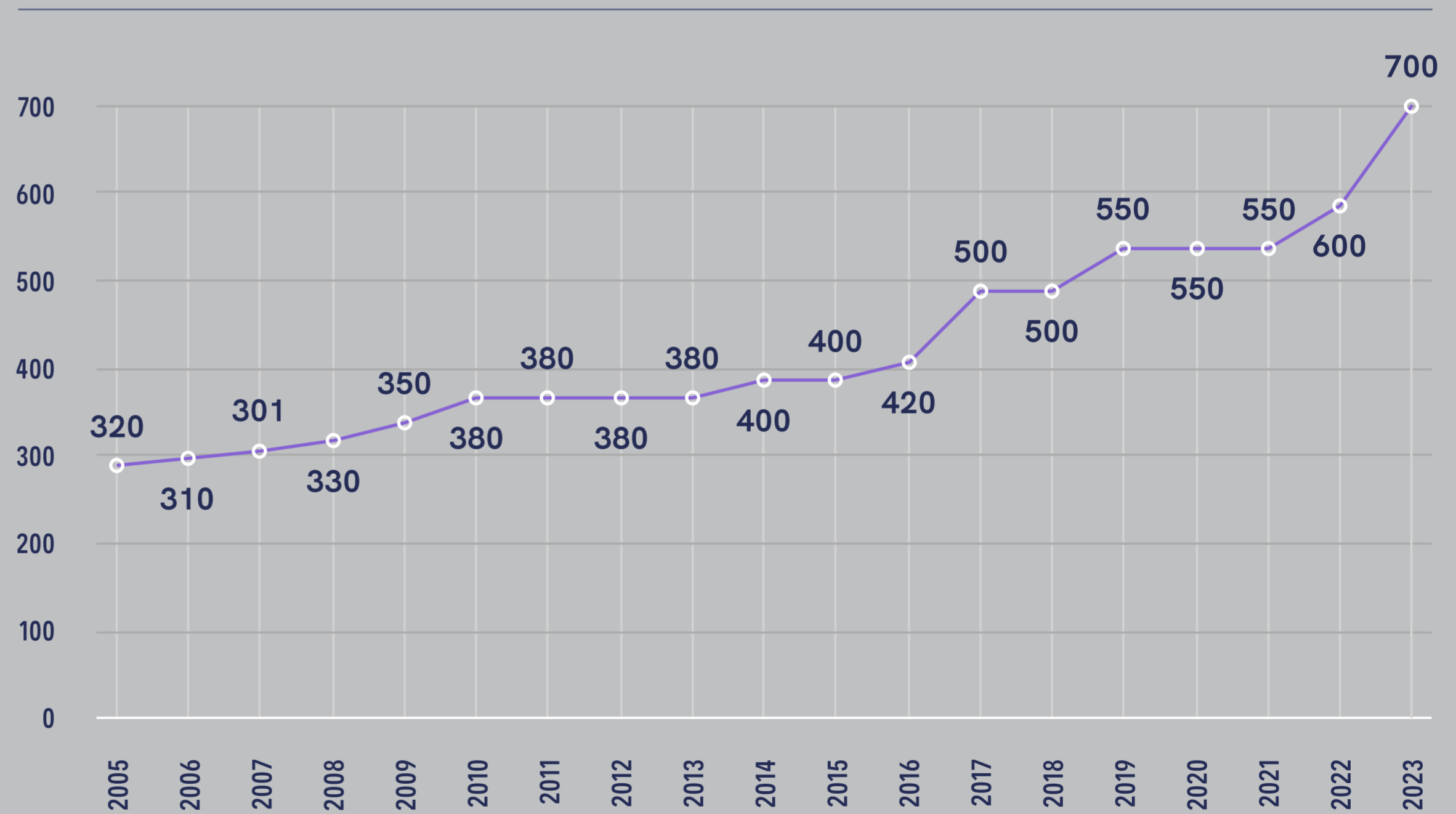
2.5.2

### Vehicle Verification Program

Based on the Environmental Code of the State of Querétaro, the Secretary of Sustainable Development (SEDESU) has the authority and responsibility to regulate mobile sources of atmospheric emissions, as well as to issue the State Vehicle Verification Program.

In order to comply with the Program, vehicles will be subject to the verification of pollutant emissions in the Verification Centers authorized by the SEDESU, during the periods established in the current Semiannual Vehicle Verification Program. In 2005, the verifiable vehicle fleet was 300,000 units; by 2023, the figure reached 700,000, which represented a growth of more than double in 18 years.

Verifiable vehicle fleet (2005 - 2023)



Source: Prepared by the authors with data from the Environmental Control Division (SEDESU), 2024.  
Note: Figures are expressed in thousands of vehicles.

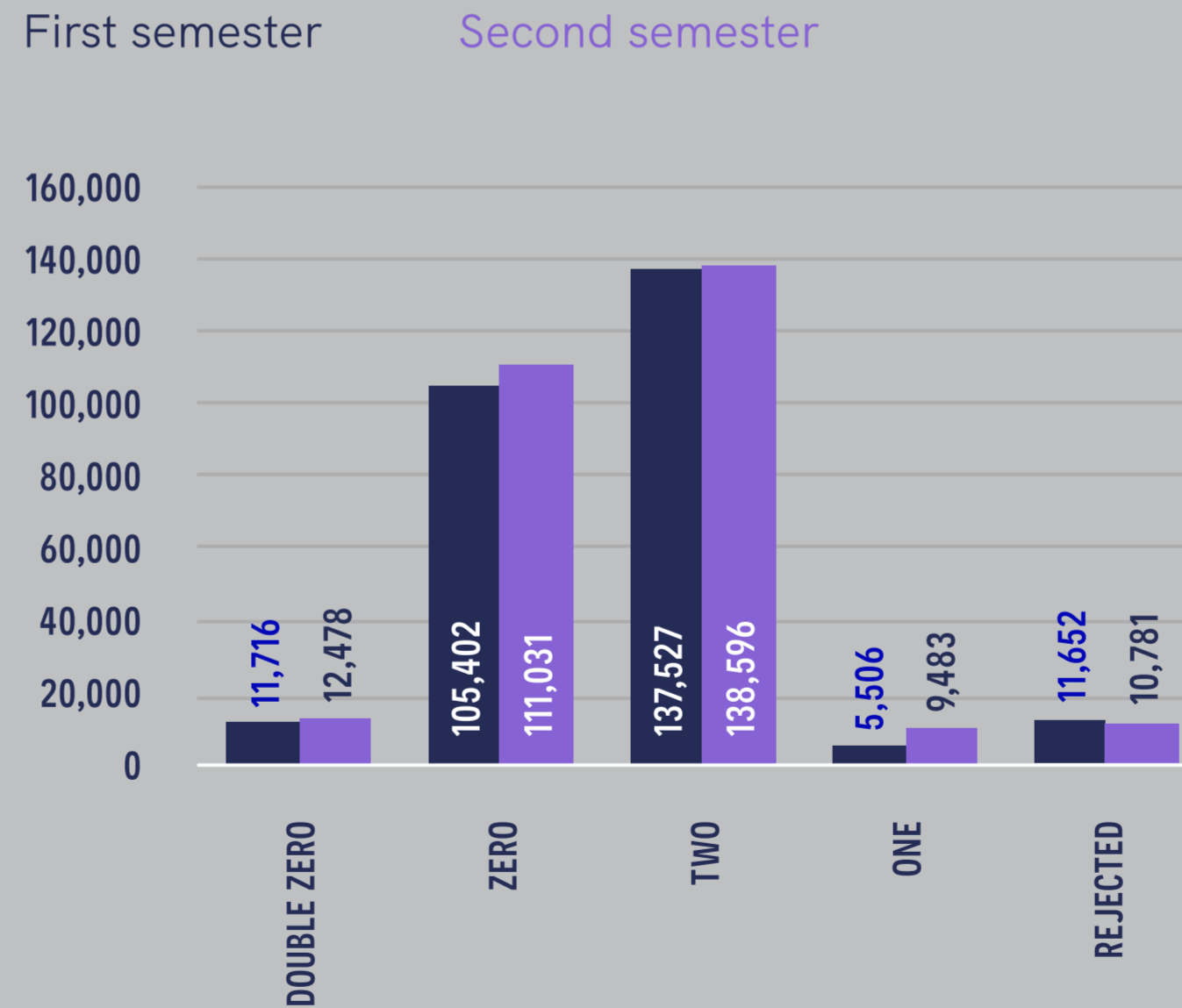


In 2023 the number of vehicles verified was 554,172. During the first half of the year, 271,803 units were verified, while in the second half the figure rose to 282,369, maintaining variations of 10.8% and 5.6%, respectively, compared to the amounts reported during the same semesters in 2022.

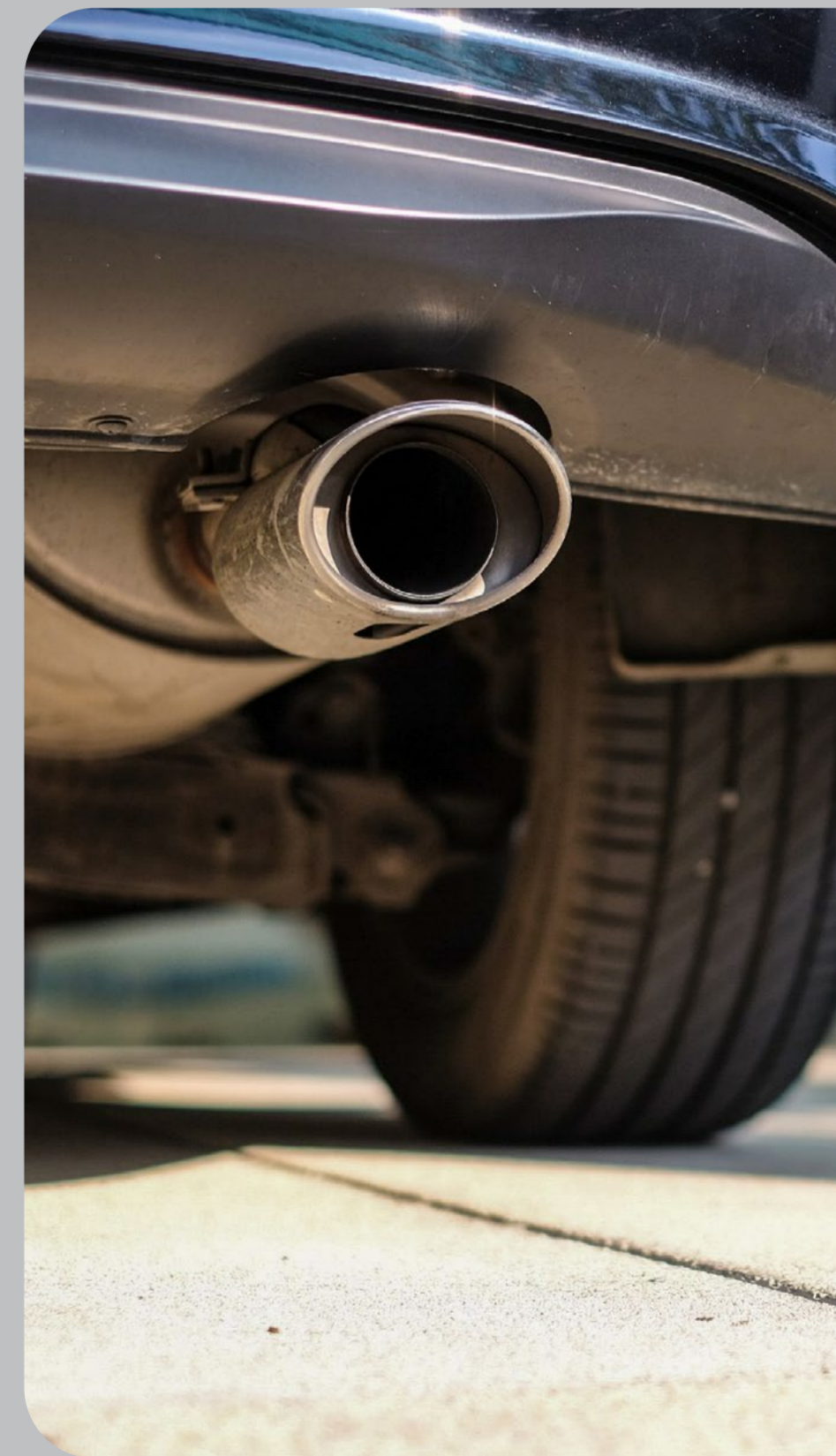
According to the modality, the “two” type certificate was the most requested by the public, reaching 50.6% of the total number of verifications issued during the first half of the year and 49.1% in thesecond half of the year. The rest corresponded to double zero, zero, one and rejection certificates, i.e., those vehicles that did not comply with the corresponding regulations.

Additionally, certificates issued for hybrid and electric vehicles are considered. During 2023, 1,421 holograms were issued, 53.3% more than in 2022.

### Vehicle Verification State Program (2023)



Source: Prepared by the authors with data from the Environmental Control Division (SEDESU), 2024.







## 2.5.3

## Querétaro International Airport (AIQ)

Opening in November 2004, AIQ is located in the municipalities of El Marqués and Colón, 22 km from Querétaro's capital city. Its facilities are spread over an area of 688.5 hectares, in which it has:

- ▶ **Dedicated infrastructure for business and corporate aviation:** 2 Fixed Base Operators (FBO), Airbusiness and Redwings.
- ▶ **An aircraft maintenance hangar, which is the second largest in Latin America:** TechOps itself serves Aeromexico, JetBlue, American Airlines, Alaska Airlines, Sun Country, Mesa Airlines and Delta Airlines.

The AIQ runway is 40 cm thick hydraulic concrete, 4,200 m long x 45 m wide, 09-27 magnetic



orientation, visual aids and VOR/DME location system and horizontal and vertical signage for day and night operations.

It is complemented by two parallel bearings, four high-speed and two central 45° medium-speed bearings.

Additionally, it has four aprons, a 23-position commercial apron with a surface area of 133,900 m<sup>2</sup>, a 6-position cargo apron with a surface area of 48,100 m<sup>2</sup>, a 35-position general aviation apron with a surface area of 24,300 m<sup>2</sup> and a 24,800 m<sup>2</sup> maintenance services apron.



### Airlines

At year-end 2023, the airlines operating at the airport (Aeroméxico, American Airlines, TAR Aerolíneas, United Airlines, Viva Aerobús and Volaris) offered 24 direct commercial routes, 18 to domestic destinations and 6 to international destinations. Through them, the main hubs, business and vacation destinations in Mexico and the United States are served.

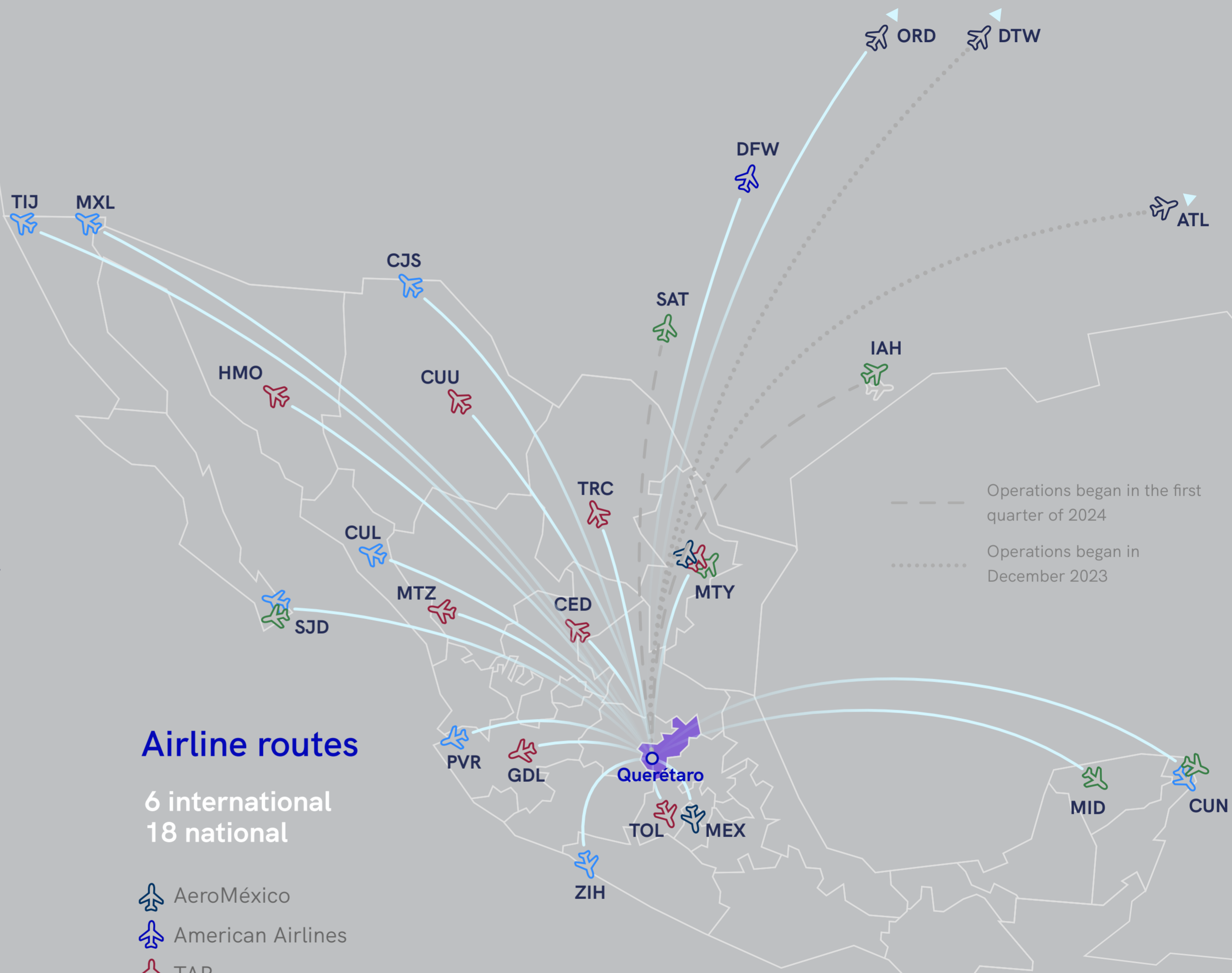
Advances in airline routes:

- ▶ In July, Volaris opened routes to destinations such as: Ixtapa, Culiacán, Ciudad Juárez, Mexicali.
- ▶ In July, Viva Aerobus opened the route to Los Cabos.
- ▶ In December, after achieving FAA Category 1 status, VivaAerobus opened San Antonio and Houston routes.

### Airline routes

6 international  
18 national

- Aeroméxico
- American Airlines
- TAR
- United
- Viva Aerobús
- Volaris



--- Operations began in the first quarter of 2024

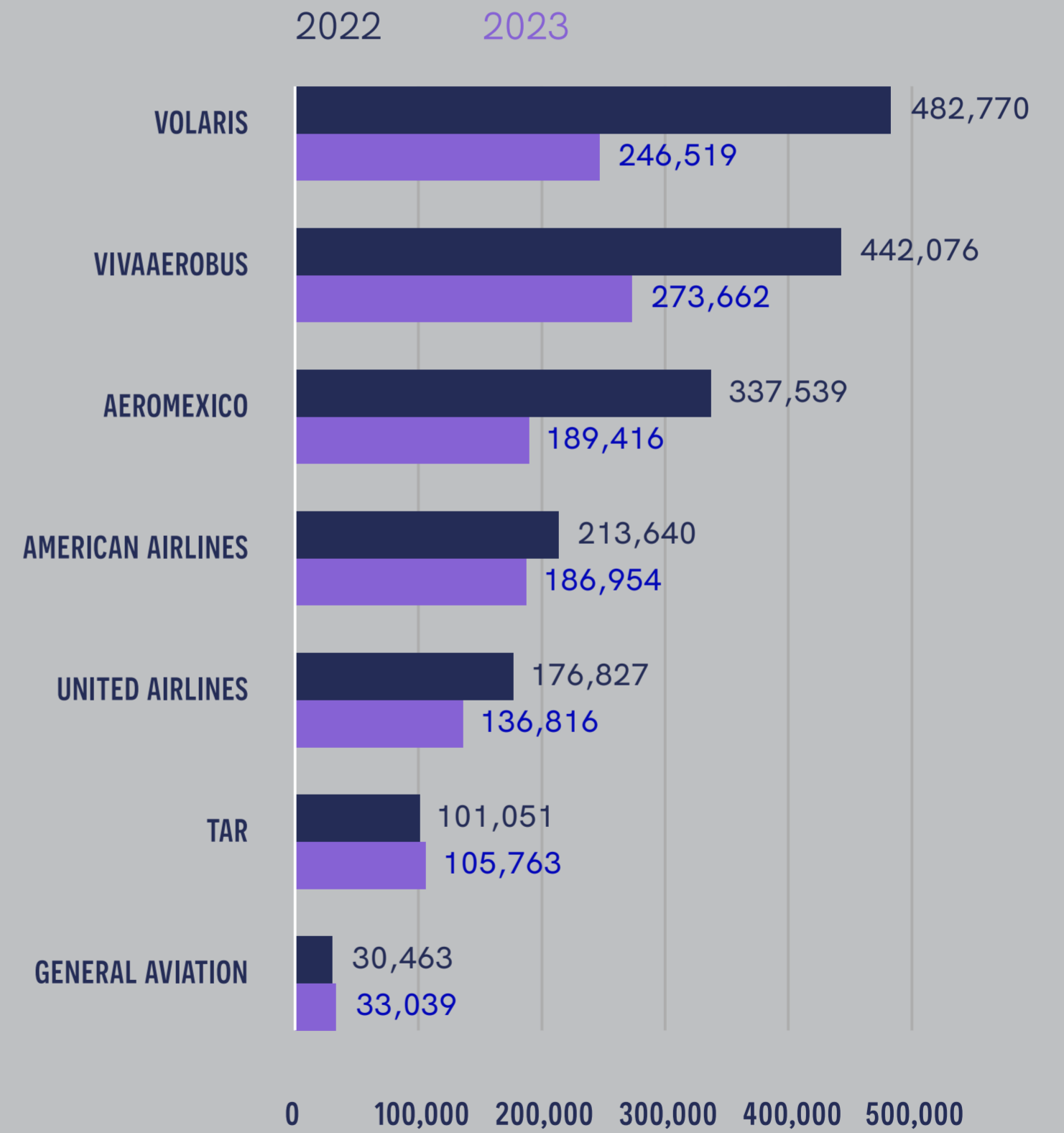
..... Operations began in December 2023



Regarding the number of passengers transported, of the six airlines operating at AIQ, Volaris was close to doubling the figure reported in 2022, obtaining an annual growth in 2023 of 95.8%, followed by Aeroméxico (78.2%), VivaAerobus (61.5%), United Airlines (29.2%) and American Airlines (14.3%). TAR, as well as general aviation, showed a decrease.



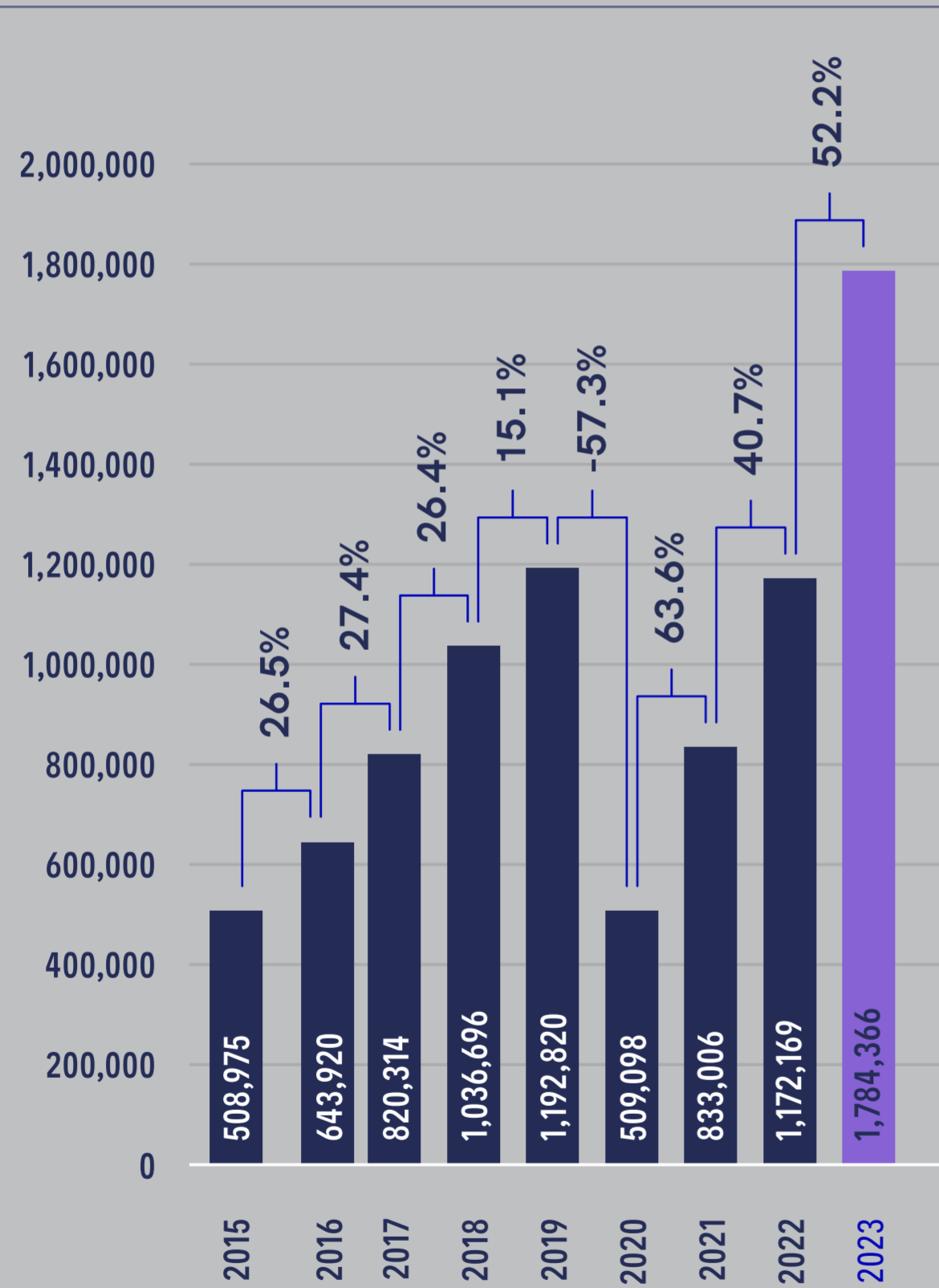
Passengers transported by airlines (2022-2023)



Source: Prepared by the authors with information from Querétaro International Airport, 2024.



### Annual transported passengers (2015-2023)



Source: Prepared by the authors with information from Querétaro International Airport, 2024.

### Passengers

During 2023, the number of passengers transported through AIQ was 1,784,366, showing an annual growth of 52.2%, or 612,197 more than in 2022. Compared to 2015, the value shows an increase of 250.3%.

Relevant data during 2023:

- ▶ AIQ ranked 16th in passengers transported among the 63 airports in Mexico, advancing 5 positions with respect to 2022.
- ▶ 75% of passengers flew domestic and 24% international.
- ▶ August was the month in which most passengers were transported, accumulating 10.2%, followed by July (9.7%), December (9.7%) and October (9.5%).





### Operations

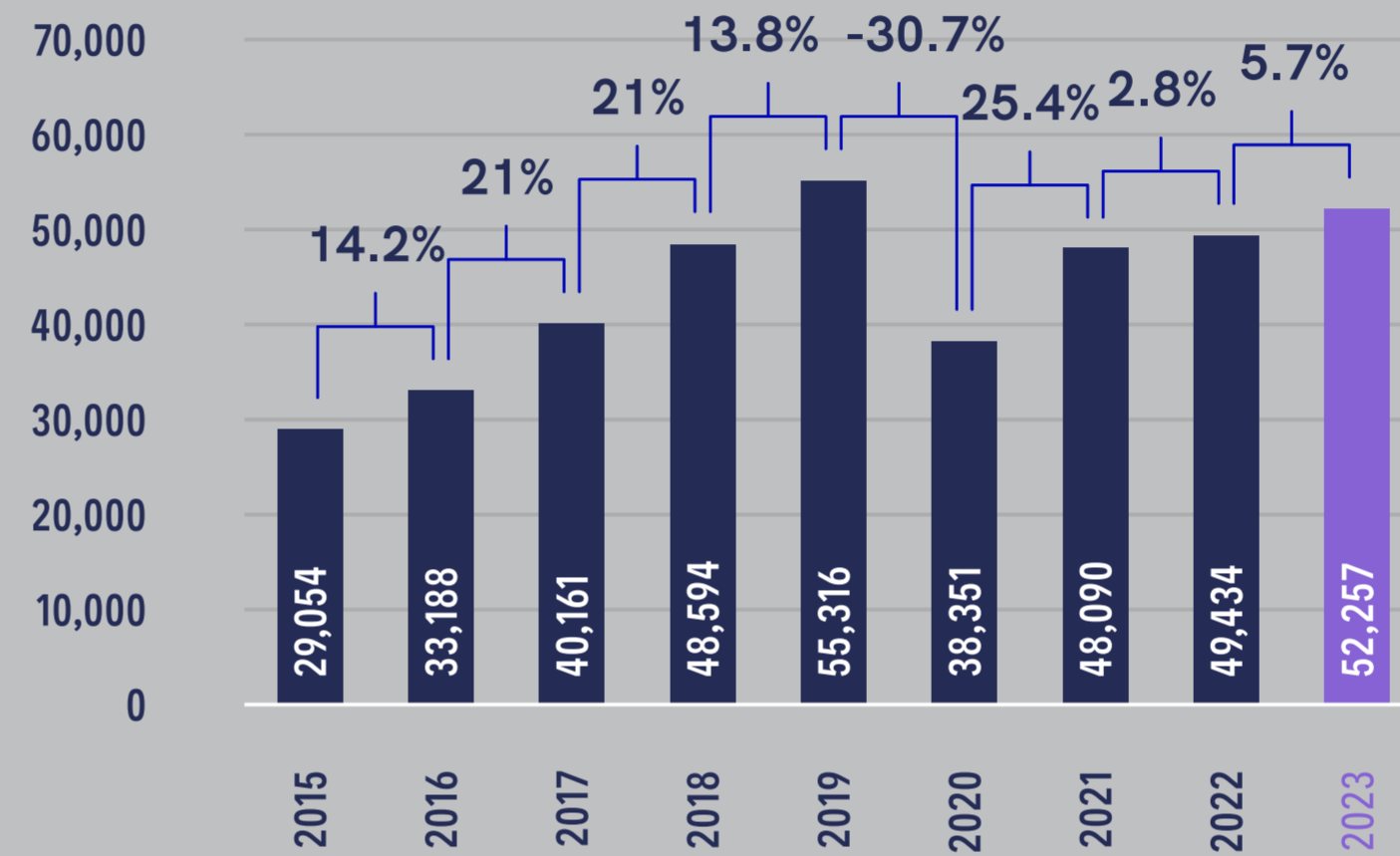
In 2023, the number of operations registered at AIQ was 52,257, showing an annual growth of 5.7%. Compared to 2015, the value shows an increase of 79.9%.

Relevant data during 2023:

- ▶ AIQ ranked 10th in terms of operations, maintaining the position reported in 2022.
- ▶ May was the month with the highest number of operations, accumulating 9.9% of operations, followed by July (9.1%), September (9%) and March (8.9%).

Commercial and general aviation operations showed annual growth of 14.4% and 3.8%, respectively, while cargo operations decreased by 4.8%.

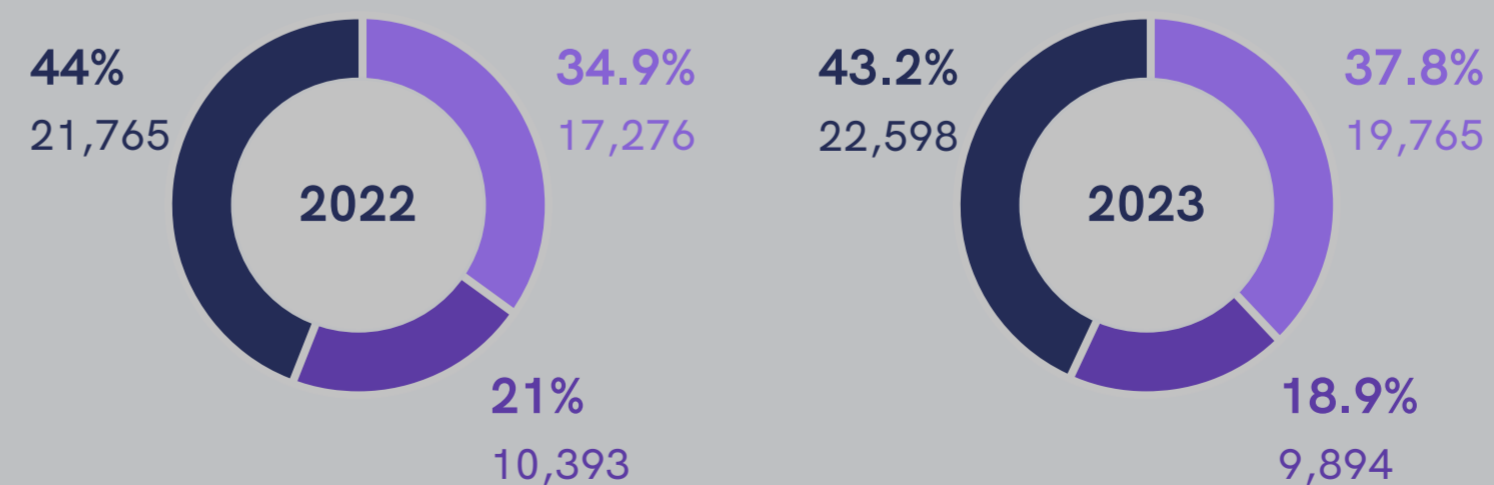
#### Annual operations (2015-2023)



Source: Prepared by the authors with information from Querétaro International Airport, 2024.

#### Balance by type of operation (2022-2023)

Commercial Cargo General aviation



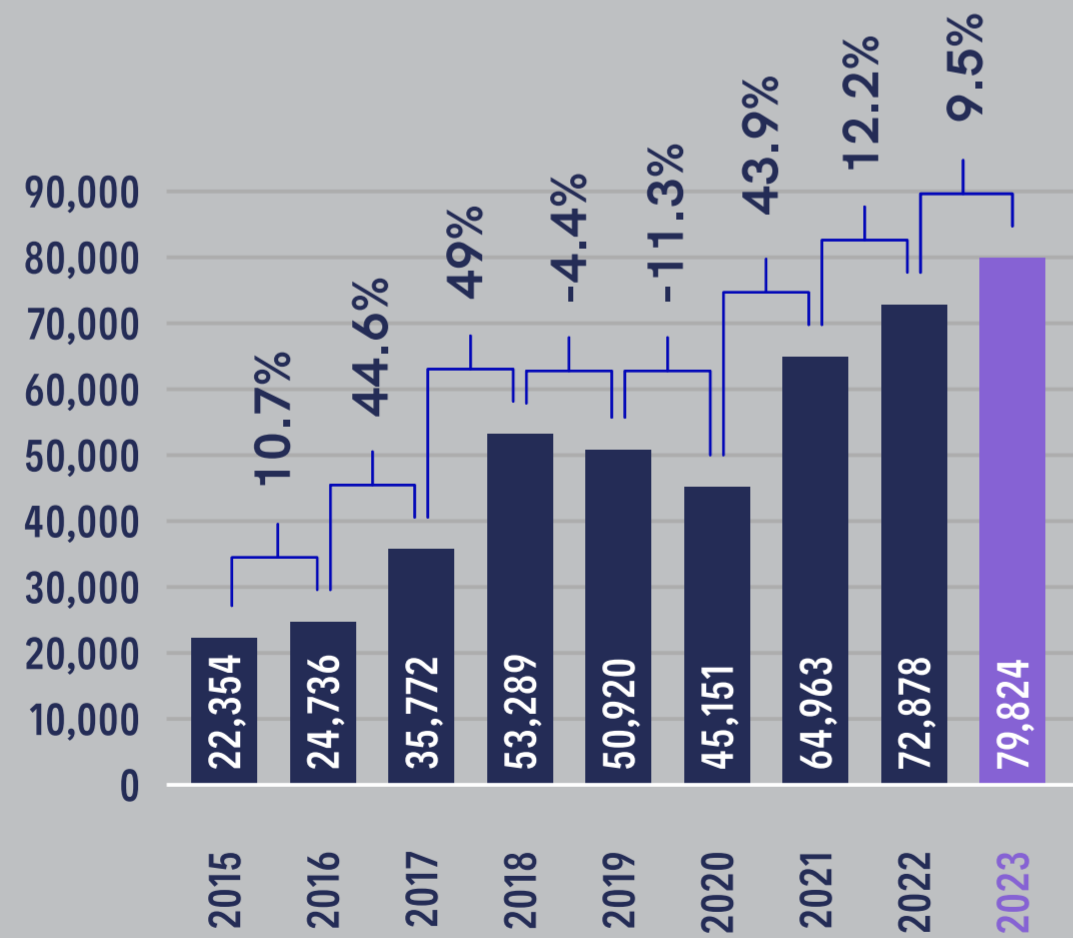
Source: Prepared by the authors with information from Querétaro International Airport, 2024.



## Tons transported

By the end of 2023, the tons of cargo transported through AIQ increased by 9.5% compared to 2022, reaching 79,824. From 2015 to 2023, the amount has grown by 257.1%.

### Tons of cargo per year (2015-2023)



Source: Prepared by the authors with information from Querétaro International Airport, 2024.

Relevant data during 2023:

- ▶ AIQ ranked 4th nationally in tons transported.
- ▶ Domestic cargo accounts for 62.5% and international cargo for 37.5%.
- ▶ June was the month with the highest number of tons transported, accumulating 9.5%, followed by March (9.3%), August (8.9%) and March (8.9%).

The companies that provided services in the cargo area were: DHL, FEDEX, Mercado Libre, UPS and TSM. Both DHL and FEDEX operate their own domestic and international hubs with direct flights connecting to their hubs in the United States to facilitate the import and export of your shipments. For their part, DHL and Mercado Libre established their base of operations in Mexico at AIQ, from where they operate their own exchange centers nationwide.

## Certifications

It received its fifth Civil Aerodrome Certificate for complying with national and international aeronautical regulations, being the first airport to do so out of the 63 commercial airports in the country.



## 2.5.4

**Querétaro Bus Terminal (TAQ)**

During 2023, the TAQ mobilized 10 million users through 149 platforms and 191 waiting boxes. It registered 511 thousand bus departures, of which 268 thousand were first class and luxury, 122 thousand regular and 121 thousand feeder.

The first class lines have destinations in the first cities of the country, as well as in the United States: Austin, Dallas, Atlanta, Chicago, Garland, Houston, San Marcos, Raleigh and Texas.

While the regular and feeder lines serve intermediate points, communities in the states bordering Querétaro, as well as municipalities and tourist sites.

**Infrastructure and equipment**

The TAQ occupies an area of 119,777.98 m<sup>2</sup>, has 18 commercial premises, 3 fast food franchises, 4 ATMs, 4 parcel service premises, 5 waiting rooms, 2 parking lots with a total of 319 parking

spaces and 2 cab stands with 24-hour service, 1,200 cabs with an average of 428 thousand services per year.



### 2.5.5

## Mobility

The Mobility Agency of the State of Querétaro (AMEQ) is the agency in charge of designing, coordinating and evaluating public policies, programs and actions related to mobility and inter-connectivity between transportation services, as well as monitoring, supervising and applying the necessary measures to ensure that public and specialized transportation services are provided in accordance with the Law.

The AMEQ updates and renews the list of concessions and permits in the Public Transportation Registry, which includes all units with permits to operate in the state. In 2023, there were 10,953 units circulating in the State, derived from having 6,997 concessions, 3,808 permits and 148 registrations for the provision of collective public service.

### Total number of units in the Public Transportation Registry circulating in Querétaro (2023)

SYSTEM	UNITS
Taxi	4,799
Mixed	100
Touristic	8
Vehicle storage and warehousing	20
Collective	2,007
Dragging and salvage	63
<b>Total</b>	<b>6,997</b>

Source: Prepared by AMEQ, 2024.

Collective transportation rates have been established since December 21, 2018, published in the "Agreement whereby the rate applicable to the collective public transportation service in the State of Querétaro is determined and authorized." in the Official Gazette of the Government of Querétaro "La Sombra de Arteaga". The document establishes the fare at 11.00 pesos for general users and a transfer of 5.50 pesos; for users with a preferential card the cost is 9.00 pesos and the transfer is 4.50 pesos.





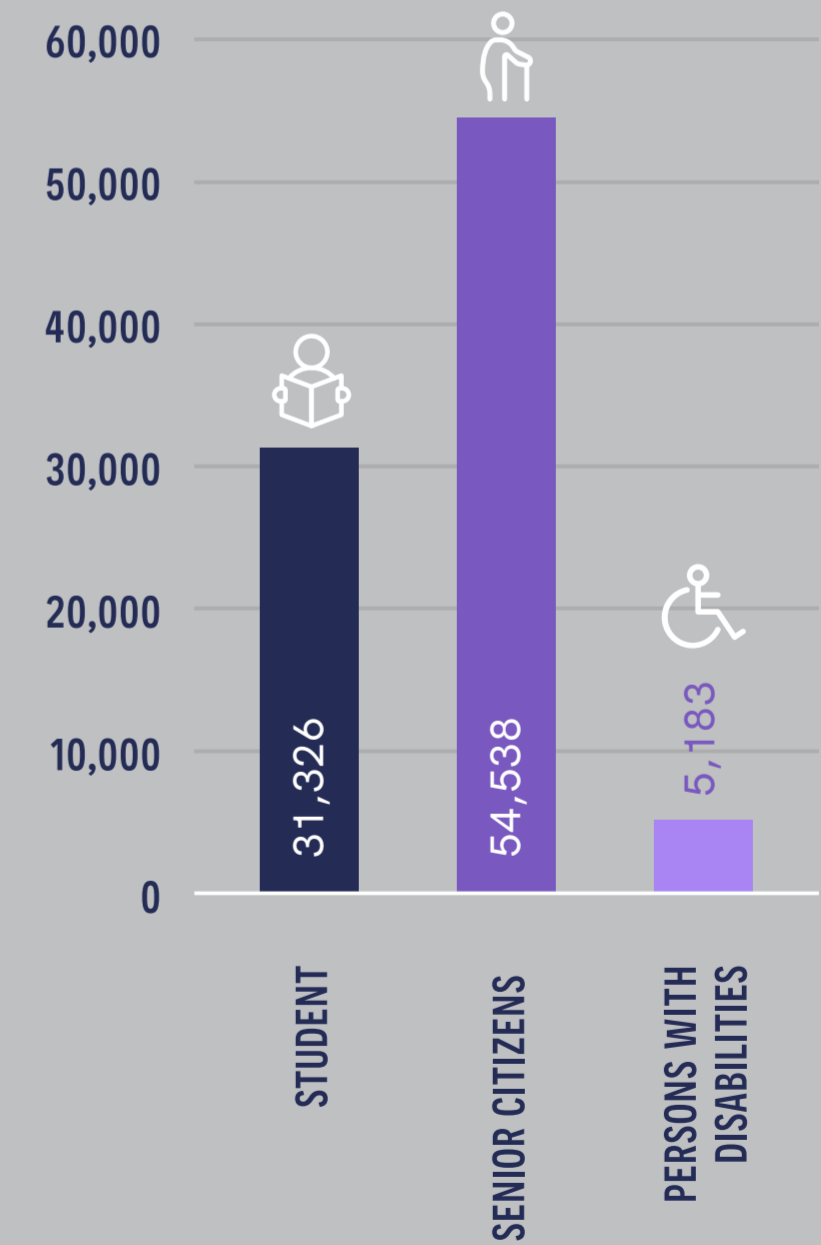


In 2023, AMEQ began to fully operate the “Tarifa Unidos” Urban Public Transportation Service Subsidy Program in the Querétaro Metropolitan Area, which grants students, senior citizens and people with disabilities a collective transportation fare of 2.00 pesos and 0.00 pesos for transfers when they have a preferential card.

During this period, 36,171 new beneficiaries were added and 29,850 grants were renewed, bringing the total number of beneficiaries of the Program at the end of 2023 to 91,047. The “Tarifa Unidos” program was used 12,832,568 times and had a count of 930 electronic validators for its use.



Total number of activated preferred cards (2023) Launch of the Tarifa Unidos (United Tariff) Program



Source: Prepared by AMEQ, 2024.



### Public Transportation Routes

As a result of the re-engineering of the routes in the state of Querétaro, by the end of 2023 there will be a total of 344 routes divided into three areas: Metropolitan Area, which represented 66.7% of the total, the San Juan del Río Zone, covering 24.8%, and the Tequisquiapan Area with 8.3%.

#### Total mass transit routes by unit type and zone (2023)

TYPE	METROPOLITAN AREA	SAN JUAN DEL RÍO	TEQUISQUIAPAN	GENERAL TOTAL
Inter-municipal	57	5	7	69
Suburban	59	44	17	120
Urban	107	40	8	155
<b>Total</b>	<b>223</b>	<b>89</b>	<b>32</b>	<b>344</b>

Source: Prepared by AMEQ, 2024.





## 3

## Prosperous Querétaro: Quality of Life

Through various governmental efforts, we seek to guarantee a good quality of life for the inhabitants of Querétaro, by means of strategies aimed at achieving an integral and harmonious relationship in the areas of human and social development, education, the labor market, sports and entertainment, security, and health.



# 3

## Prosperous Querétaro: Quality of Life

### 3.1 Economic development

- 3.1.1 Employment
- 3.1.2 Labor peace

### 3.2 Human development

- 3.2.1 Education
- 3.2.2 Health
- 3.2.3 Sports and entertainment
- 3.2.4 Youth
- 3.2.5 Human Development Index (HDI)

### 3.3 Social development

- 3.3.1 Security
- 3.3.2 Accesibility
- 3.3.3 Poverty and Inequality
- 3.3.4 Regional development programs
- 3.3.5 Social development programs



# PROSPEROUS QUERÉTARO

5<sup>o</sup>

STATE WITH THE  
BEST SALARY

10<sup>o</sup>

STATE WITH THE BEST  
HDI NATIONALLY

1,126,361

EMPLOYED POPULATION

1,684

SPORTS AND  
LEISURE SPACES

1,622,038

PEOPLE AFFILIATED  
TO HEALTH SERVICES

661,254

STUDENTS REGISTERED FOR  
THE 2023-2024 SCHOOL YEAR

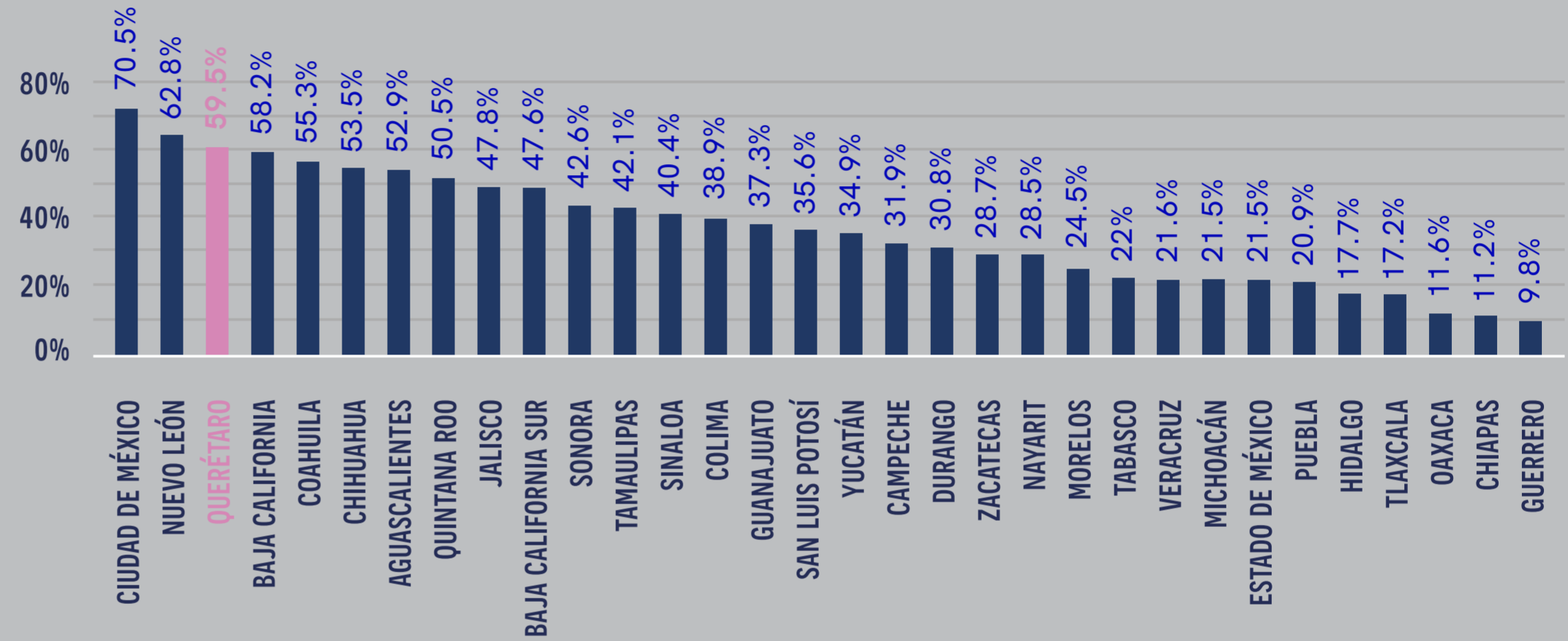




3.1

# Economic development

### Rate of insured jobs with respect to the Economically Active Population (2023)



Source: Prepared by the authors with data from the Mexican Social Security Institute (dynamic query) and the National Institute of Statistics and Geography (National Occupation and Employment Survey), 2024.

Note: The values of insured jobs were obtained by averaging the insured jobs for the 12 months of the year. Regarding the Economically Active Population, the values for the four quarters of 2023 were averaged.

3.1.1

## Employment

The generation of well-paid jobs is considered one of the State Government's priority objectives, as it improves the quality of life of the citizens and gives them the possibility of having better opportunities, both in the labor and personal spheres.

## Registered insured workers

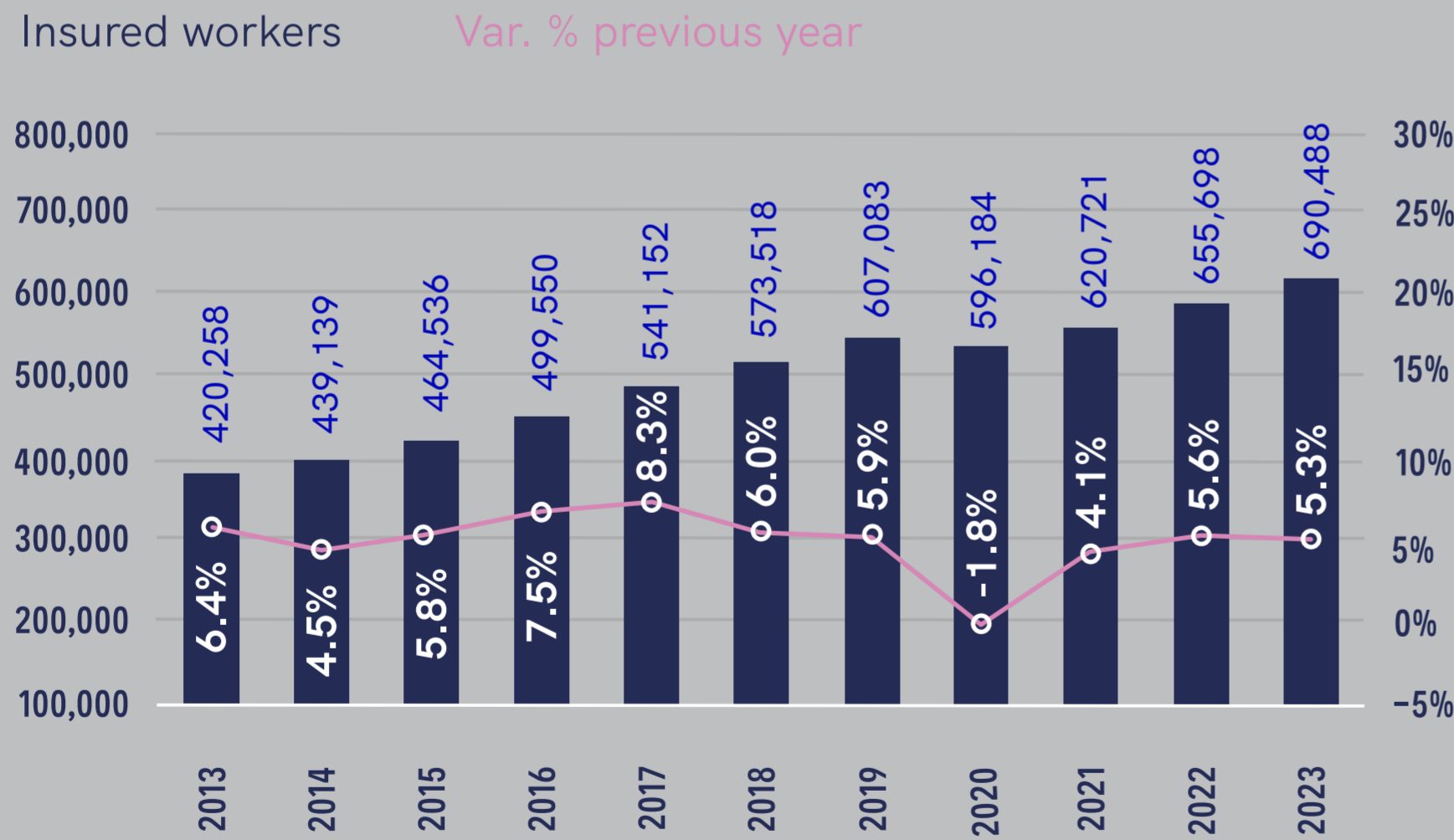
According to the Mexican Social Security Institute (IMSS, by its Spanish acronym), over the 12 months of 2023, a total of 21,938,304 insured jobs were averaged nationwide, 3.1% were reported in Querétaro, that is, 690,488.8.

With respect to the absolute value of insured jobs, the state ranked 11th, however, in the rate of insured jobs with respect to the Economically Active Population, it ranked among the first places.



The evolution of insured jobs in Querétaro over the years has maintained a positive trend, from 2013 to 2023 these have increased by 270,230, maintaining mostly growth rates above 4%.

### Insured workers in Querétaro (2013-2023)



Source: Prepared by the authors with data from the Mexican Social Security Institute (Dynamic consultation), 2024.

Note: The values of insured jobs were obtained by averaging the insured jobs for the 12 months of the year.

Of the total number of jobs insured in the state during 2023, 40% (276,161) were jobs held by women and 60% (414,326) by men.

### Insured jobs by sector in Querétaro (2022-2023)

SECTOR	2022	2023	VAR. %	PARTICIPATION WITH RESPECT TO NATIONAL FIGURE <sup>1</sup>
Processing industry	237,064	245,054	3.4%	4.1%
Services for businesses, individuals and the home	126,852	134,290	5.9%	2.9%
Commerce	109,229	115,382	5.6%	2.6%
Construction industry	58,931	64,002	8.6%	3.5%
Social and community services	59,784	61,922	3.6%	2.7%
Transportation and communication	37,620	42,218	12.2%	2.8%
Agriculture, livestock, forestry, fishing and hunting	21,083	21,800	3.4%	2.9%
Electric power industry and drinking water collection and supply	3,650	3,879	6.3%	2.5%
Extractive industries	1,814	1,893	4.3%	1.4%

Source: Prepared by the authors with data from the Mexican Social Security Institute (Dynamic consultation, jobs by economic sector), 2024.

Note: The values of insured jobs were obtained by averaging the insured jobs for the 12 months of the year.

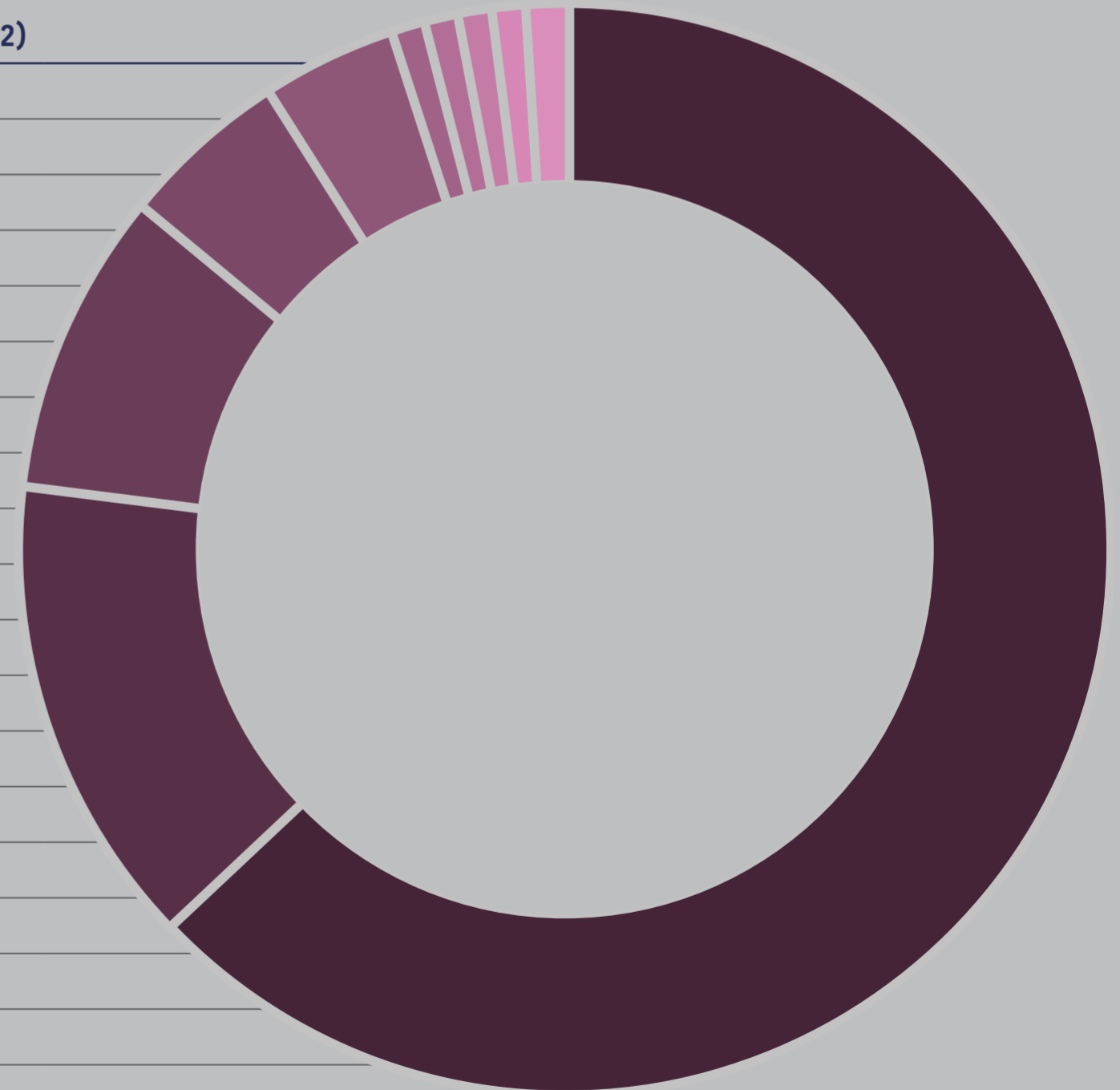
<sup>1</sup> The figures refer to the participation of each sector in Querétaro with respect to those reported at the national level, during 2023.



At the end of 2023, the largest number of jobs were concentrated in the capital of Querétaro, while the largest annual variation occurred in the municipality of San Joaquín, where the jobs increased more than double.

Distribution of insured workers by municipality in Querétaro (December 2023)

MUNICIPALITY	EMPLOYMENT	DISTRIBUTION	VAR. % (2023 - 2022)
Querétaro	437,080	62.9%	4.6%
El Marqués	98,738	14.2%	7.3%
San Juan del Río	65,661	9.4%	3.1%
Corregidora	36,855	5.3%	0.4%
Colón	24,949	3.6%	8.6%
Pedro Escobedo	10,633	1.5%	10.5%
Tequisquiapan	6,370	0.9%	8.6%
Ezequiel Montes	5,344	0.8%	2.3%
Amealco	3,174	0.5%	10.9%
Huimilpan	2,557	0.4%	9.4%
Cadereyta de Montes	2,151	0.3%	-0.05%
Jalpan de Serra	764	0.1%	12.7%
Tolimán	269	0.04%	5.9%
Pinal de Amoles	251	0.04%	9.6%
San Joaquín	347	0.05%	119.6%
Landa de Matamoros	70	0.01%	27.3%
Arroyo Seco	56	0.01%	21.7%
Peñamiller	13	0.002%	0%



Source: Prepared by the authors with data from the Mexican Social Security Institute (Dynamic consultation), 2024.

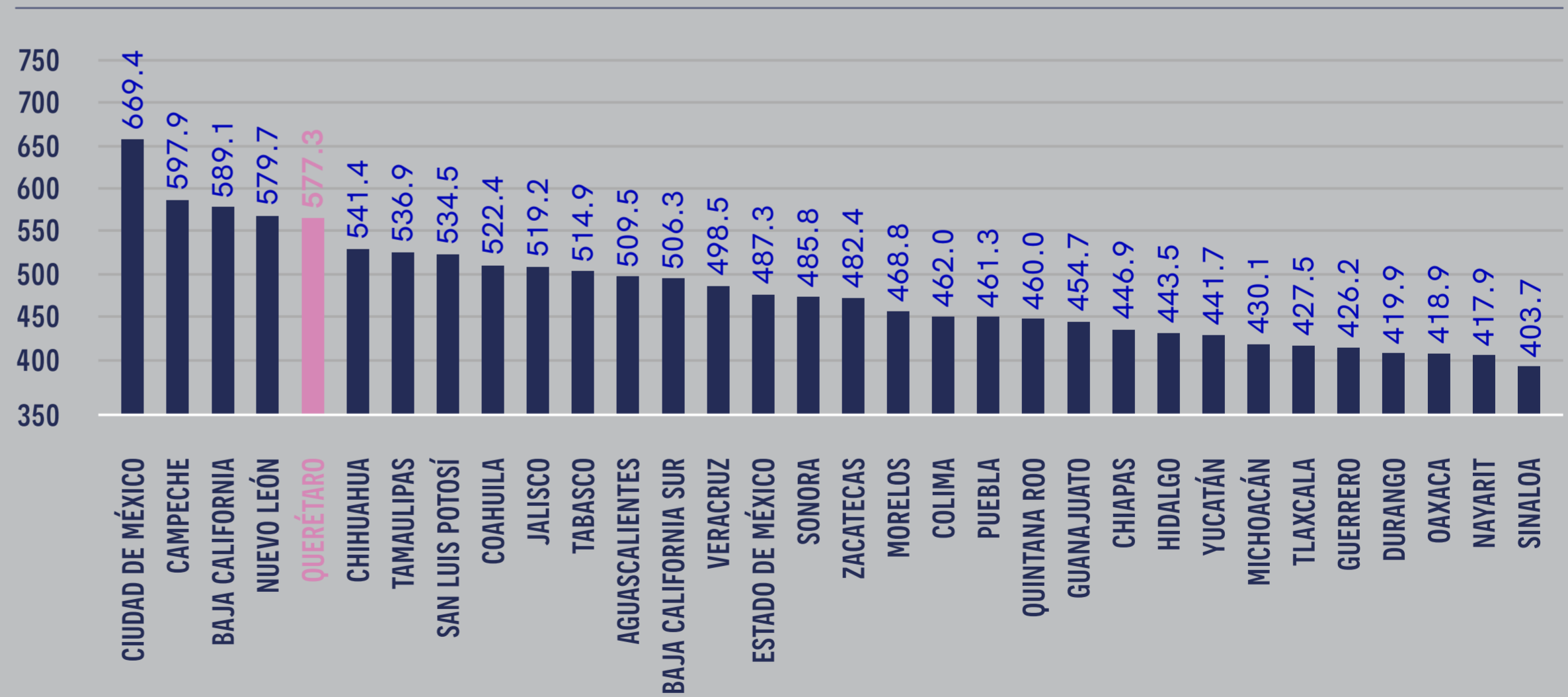




### Income levels

According to the Ministry of Labor and Social Welfare, during 2023, the average daily wage associated with IMSS-insured workers nationwide was 491.7 pesos. Querétaro ranked as the 5th state with the highest wage, reaching 577.3 pesos, a value that maintains a difference of 92.2 pesos with respect to the highest wage at the national level.

Daily wage associated with IMSS-insured workers by state (2023)

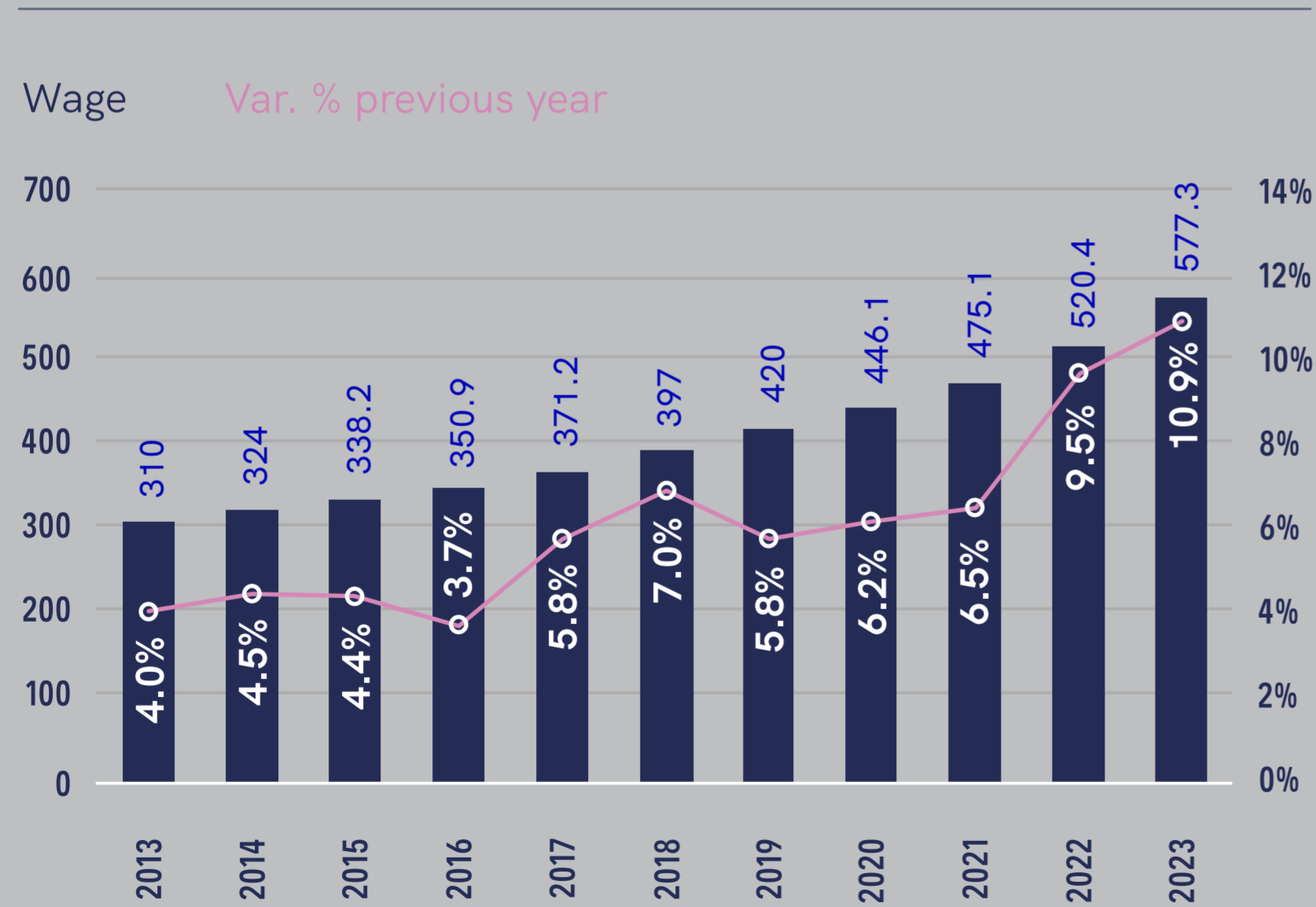


Source: Prepared by the authors with data from the Ministry of Labor and Social Welfare (Administrative Wage Records), 2024.



From 2013 to 2023, the wage has evolved positively, maintaining annual growth rates above 3.5%.

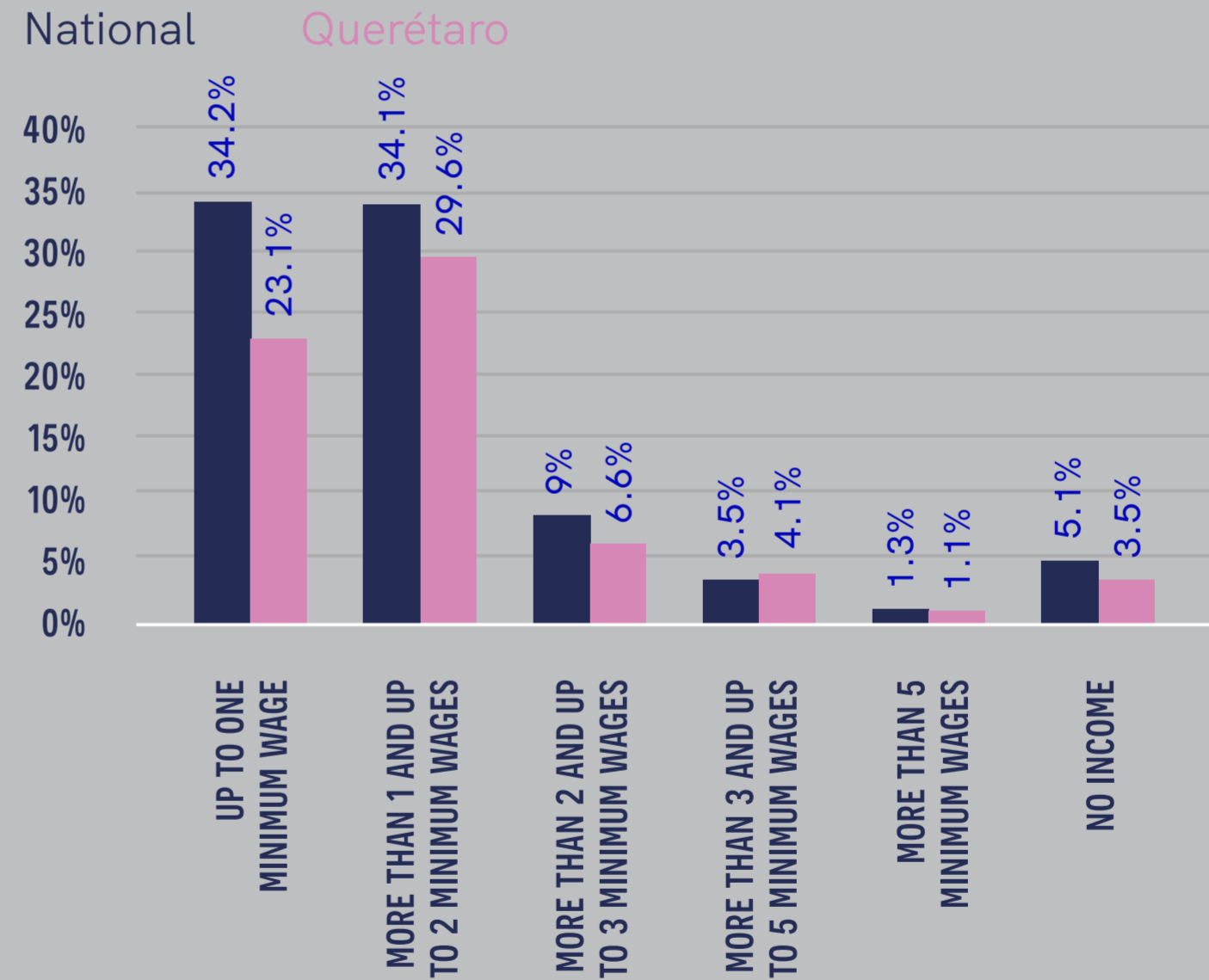
Daily wage associated with IMSS-insured workers in Querétaro (2013-2023)



Source: Prepared by the authors with data from the Ministry of Labor and Social Welfare (Administrative Wage Records), 2024.

According to the National Occupation and Employment Survey (ENOE, by its Spanish acronym), an average of 1,126,361 people were employed in Querétaro during 2022. In terms of income level, Querétaro has a lower percentage of the population in the lowest income categories.

Distribution of population occupied by income level in Querétaro and National (2023)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (National Occupation and Employment Survey), 2024.

Note: The sum of the columns for both classifications does not equal 100% because the population that did not specify information about their income level was not considered. For Querétaro, this figure represents 32%, and for the national level, it represents 12.9%.

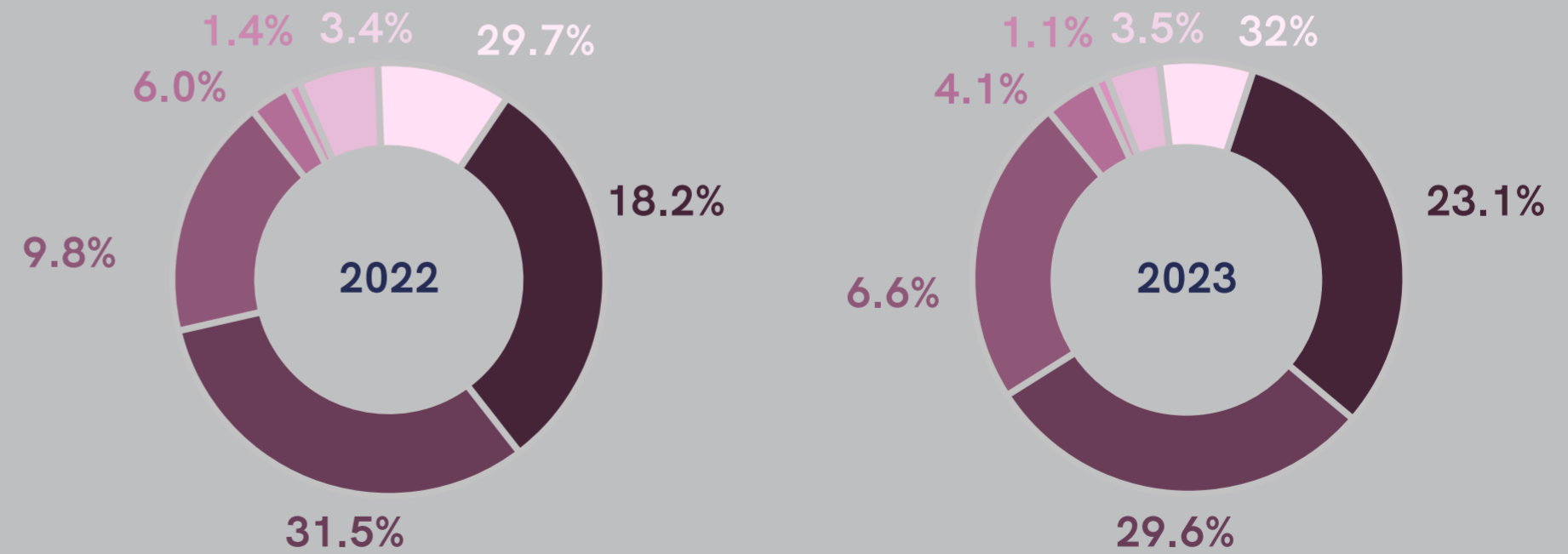
The values used to calculate the distribution for each category were obtained through the average of the four quarters of the year.



In Queretaro during 2023, 154,502 women earned incomes of “up to one minimum wage”, which represents 32.4% of the total number of women in the employed population, while in the case of men, only 106,165 were under this condition, a figure that represents 16.4% of the total number of employed men.

From 2022 to 2023, the number of employed persons earning up to one minimum wage increased by 73,999 and those earning more than 1 and up to 2 minimum wages by 10,426. The subsequent categories suffered a decrease in the number of people.

### Distribution of population occupied by income level in Querétaro (2022-2023)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (National Occupation and Employment Survey), 2024.

Note: The values used to calculate the distribution for each category were obtained by averaging the four quarters of the year.



### National Employment Service (SNE, by its Spanish acronym)

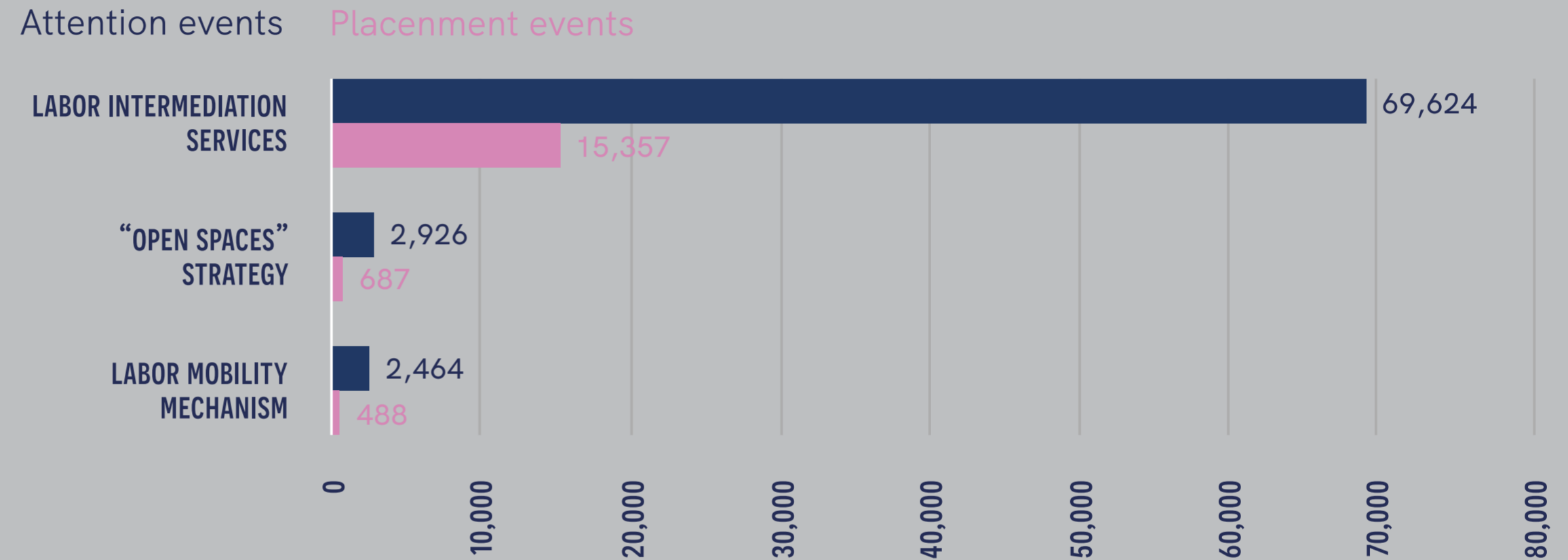
The Ministry of Labor, through the National Employment Service (SNE), has various services, strategies and programs focused on linking people to job opportunities and professional mobility abroad, which provide assistance and help place them in the labor market.

During 2023, several events and programs were held in Querétaro:

#### Labor intermediation programs

- ▶ **Job placement services.** Job bank, job fairs and expos, massive recruiting and job portal.
- ▶ **“Open Spaces” Strategy.** It provides personalized attention to job seekers with disabilities, senior citizens, released and pre-released persons and other priority groups, as well as to employers who seek to be inclusive, in order to promote the necessary conditions for the placement of these groups in a job and thus achieve their social and labor inclusion.

### Labor intermediation services and subprogrammes of the Employment Support Program (2023)



Source: Prepared by the authors with information from the Ministry of Labor of the Executive Branch of the State of Querétaro with data from the National Employment Service, 2024.

Note: The “Labor Mobility Subprogrammes” section includes the “Labor Mobility Mechanism” and “Mexico-Canada Seasonal Agricultural Workers” categories.

- ▶ **Labor mobility mechanism.** It links qualified personnel to facilitate their placement with foreign employers seeking to fill vacancies in non-agricultural positions, mainly in the United States and Canada.
- ▶ **Mexico-Canada seasonal agricultural workers.** It links and follows up with selected agricultural workers who are integrated into Canadian agricultural companies through legal, regulated, dignified and effective work.

These actions generated 75,014 attention events and 16,532 placements.



### Job training

The Ministry of Labor, through the SNE, promotes job training as a strategy aimed at job seekers who need instruction to develop new skills that will enable them to enter the labor market more easily.

In order to meet this objective, 8,757 training events were held in 2023, 1,196 more than in 2022. In addition, 382 training courses were carried out.

The figures reported in this section include training events and courses of the training subprogramme of the State Employment Program (Training Support for Self-Employment, Scholarships for Talent Training Subprogramme and Women Transportation Operators Subprogramme).

### State Employment Program

#### Subprogramme for Promotion of Self-Employment

- ▶ **Training Support for Self-Employment.** For the benefit of 1,491 people, the support aims to strengthen or reconvert the skills of job seekers, so that they can undertake a productive activity on their own account
- ▶ **Equipment Support for Self-Employment.** Grants -in kind- furniture, machinery, equipment and/or tools, to those job seekers who intend to integrate a productive initiative on their own account, giving punctual follow-up to the project for one year, from the delivery of the support. During 2023, 431 people benefited from this program.





### “No Gap” Distinctive Subprogramme

The “No Gap” Distinction was awarded to 79 companies committed to gender equality, which implemented good labor practices projects to eliminate situations of harassment and workplace violence, the wage gap and all types of discrimination against women due to maternity, family care, health, marital status or age, among others.

### Unemployment Insurance Subprogramme

We benefited 3,177 people in order to reduce the difficulties they face in their search for employment by providing job placement services, training and economic support to facilitate their incorporation into a productive activity in the shortest possible time.

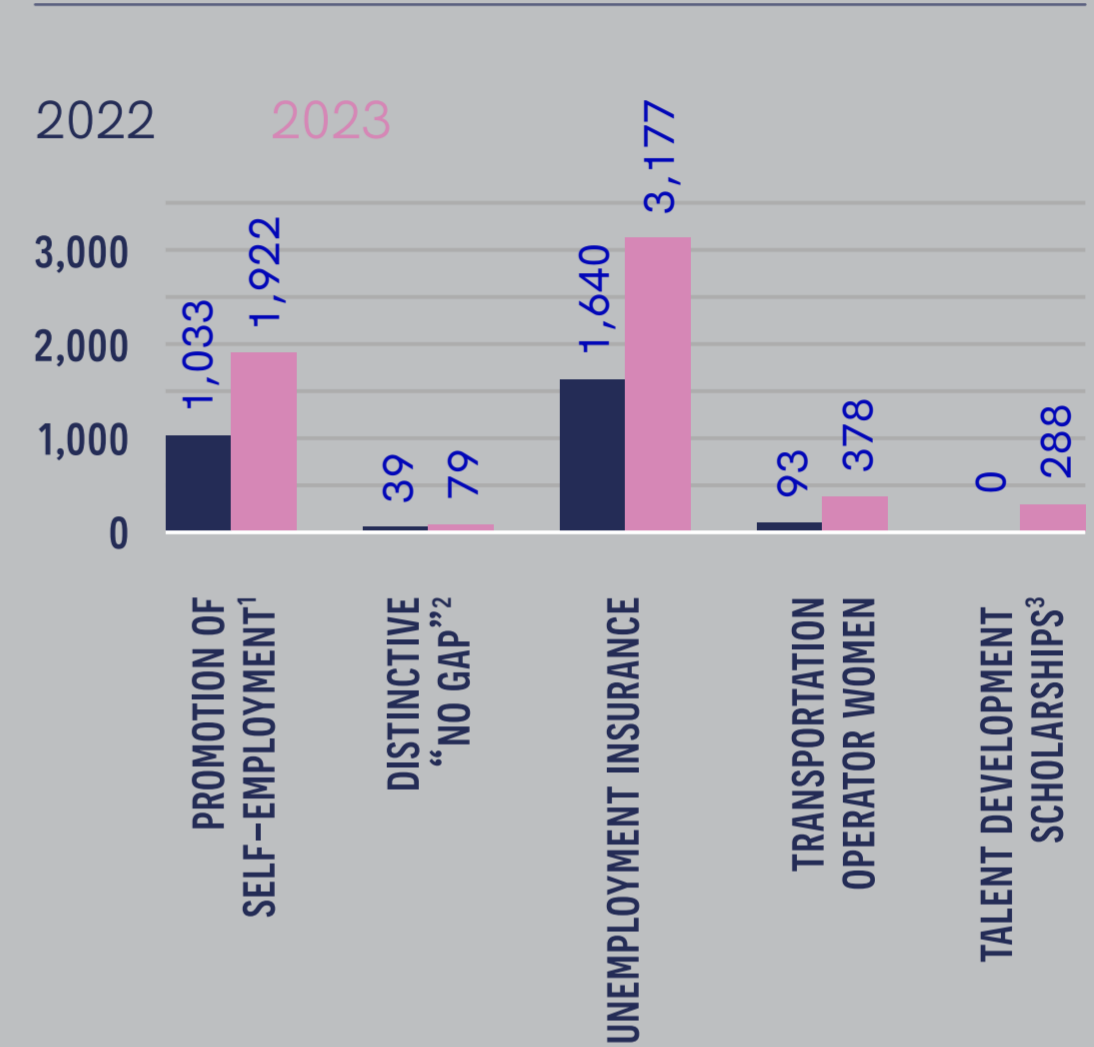
### Women Transportation Operators Subprogramme

The necessary conditions were created for the labor insertion of women by specializing their job profiles according to the requirements of the labor market, specifically in the personnel transportation sector. Groups of women were trained for two months and, depending on their aptitudes, were granted a type C license to insert them into the labor market in this sector. The program benefited 378 women.

### Talent Development Scholarships subprogramme

In accordance with the requirements of the labor market, the necessary conditions were created for the labor insertion of men and women in companies that require training before hiring, benefiting 288 people.

Beneficiary evolution by subprogramme (2022 - 2023)



Source: Prepared by the authors with information from the Ministry of Labor of the Executive Branch of the State of Querétaro (National Employment Service), 2024.

Note: <sup>1</sup> The reported figure is the sum of beneficiaries from the "Training Support for Self-Employment" and "Equipment Support for Self-Employment" programs.

<sup>2</sup> Refers to benefited companies.

<sup>3</sup> For 2022, no information was reported for this subprogram.

In 2023, SNE maintained its ISO 9001:2015 Certification, in order to promote a continuous improvement scheme for job seekers and companies and to continue providing a better service.



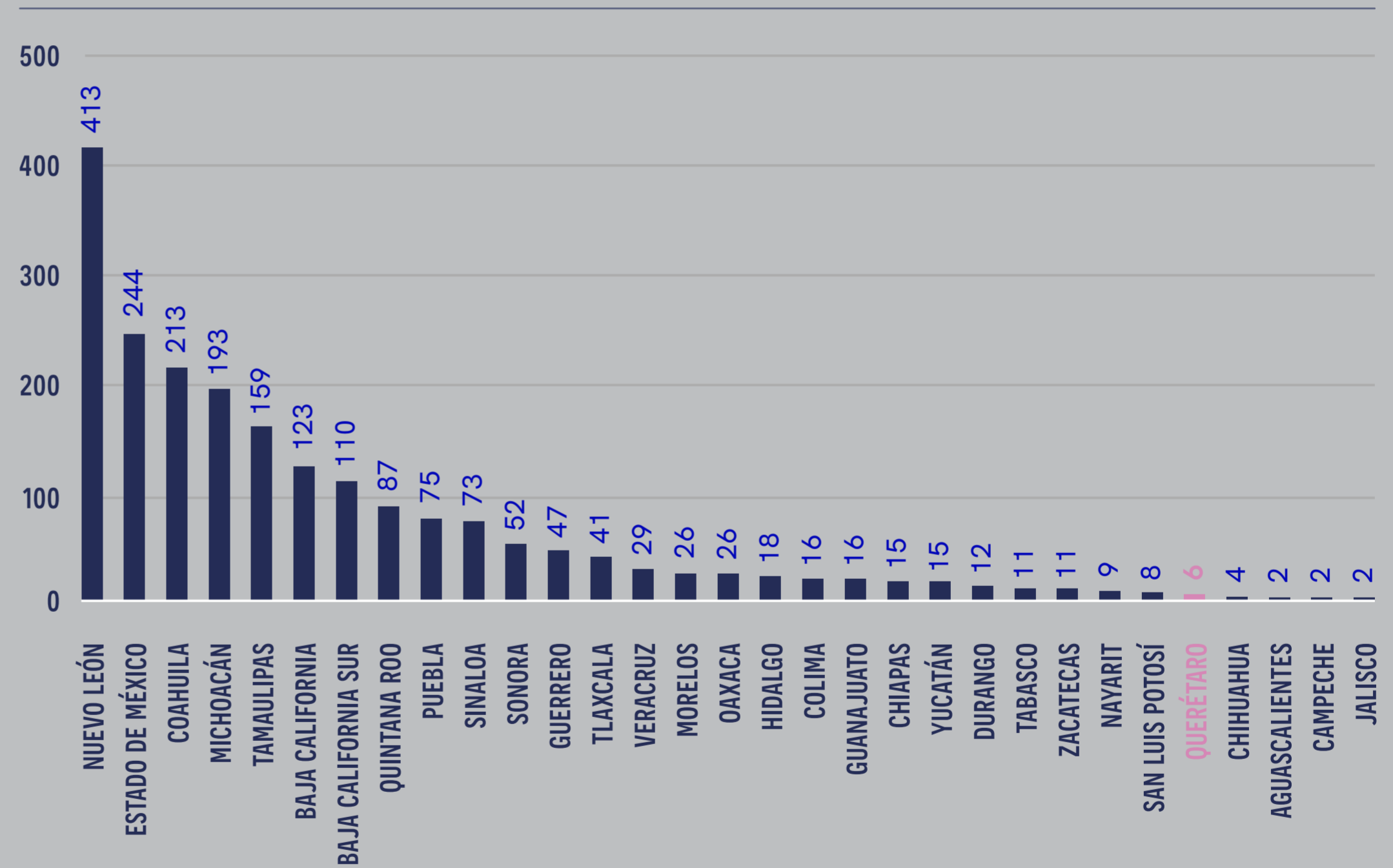
3.1.2

Labor peace

Strike registration

During 2022, 3,151 strike calls were registered nationwide, with Ciudad de México being the state that held 34.7% of them. In the case of Querétaro, only 6 were registered, occupying the 5th position with the fewest records.

Strike calls by state (2022)



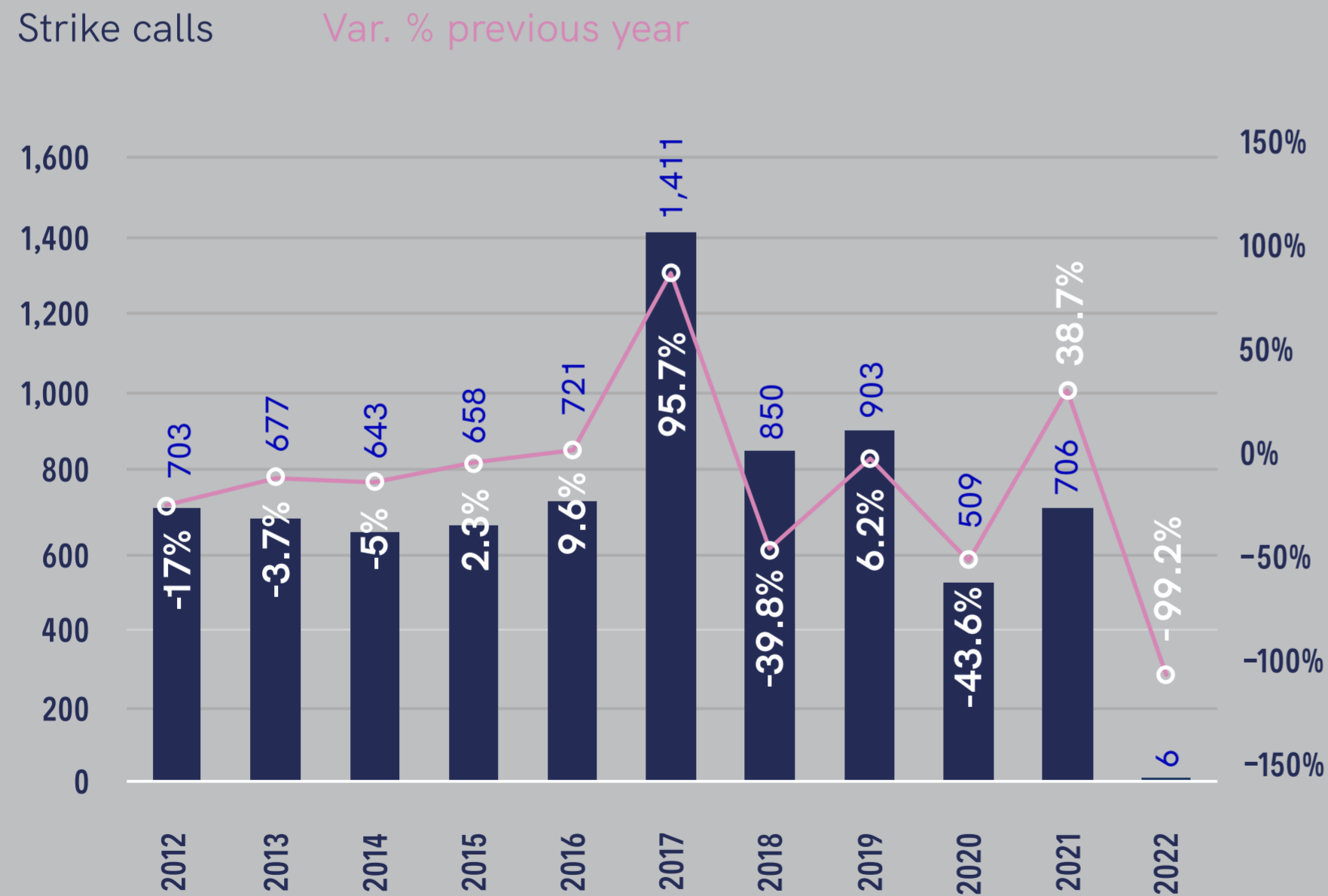
Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Labor Relations of Local Jurisdiction), 2024.

Note: For illustrative purposes, Ciudad de México was not included in the graph; however, it is the state with the highest number of strike calls with 1,093.



From 1991 to 2022, Querétaro registered a total of 18,459 strike calls -a figure that represents 2.3% of the national total- and only 28 strikes broke out, the last one being in 2016.

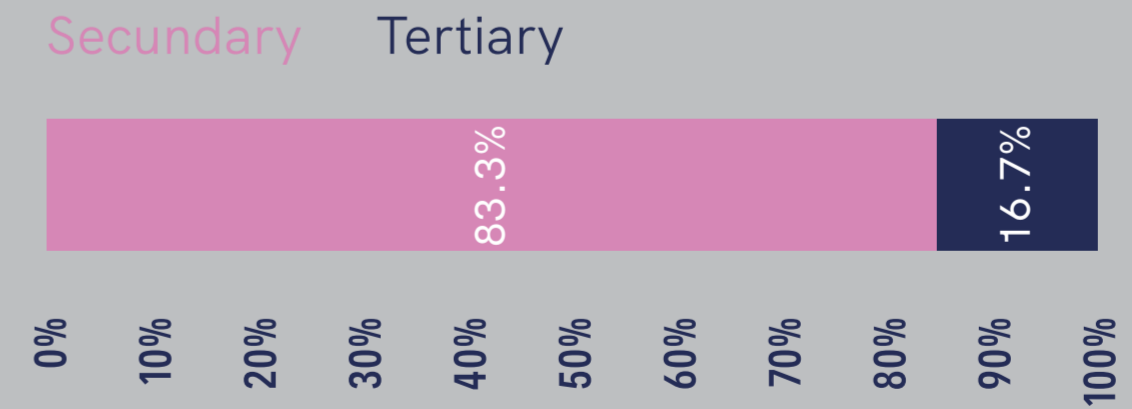
### Strike calls in Querétaro (2012-2022)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Labor Relations of Local Jurisdiction), 2024.

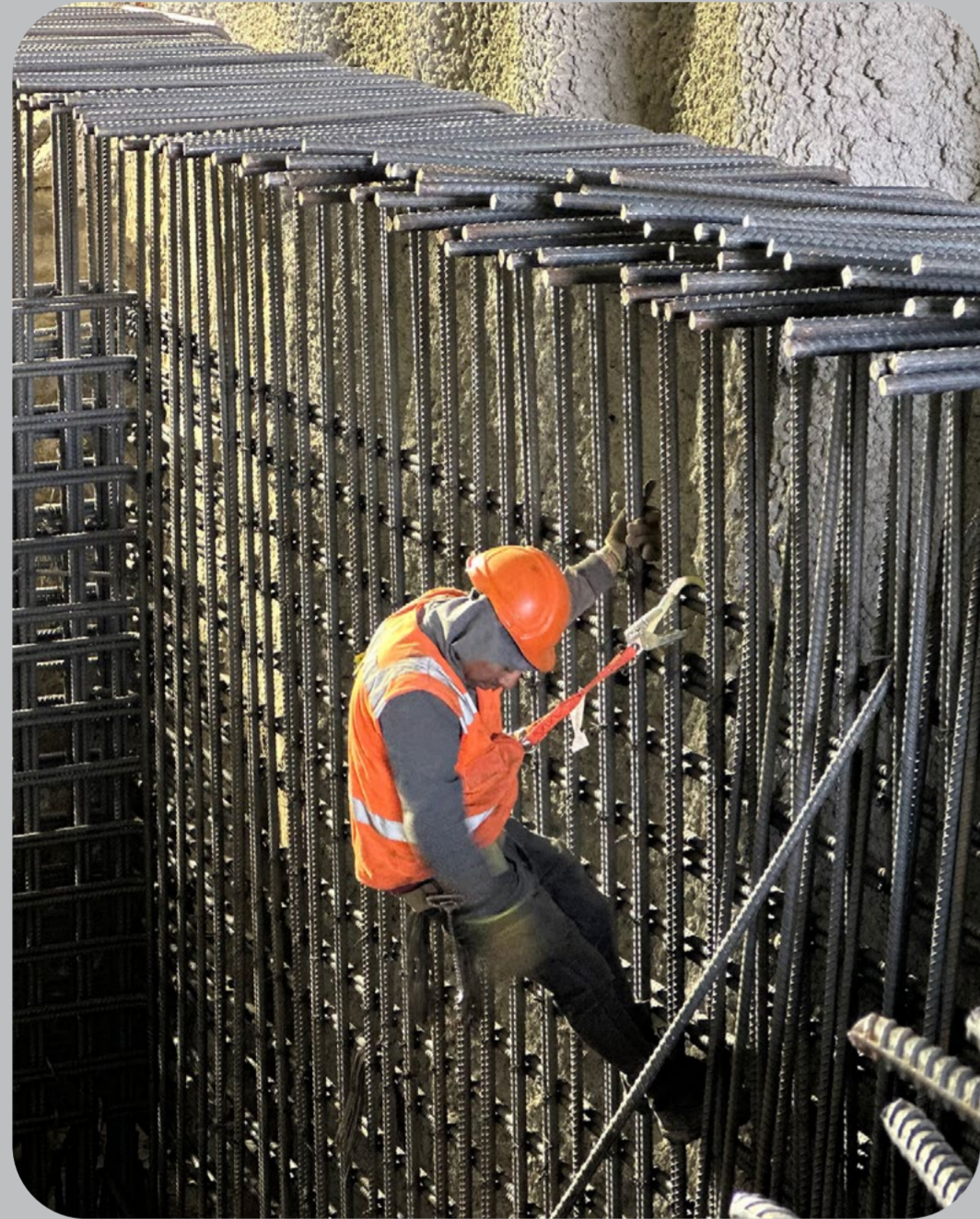
Of the total number of sites registered during 2022 in the state, 83.3% (5) were in secondary activity and 16.7% (1) in tertiary activity.

### Distribution of strike calls by economic activity in Querétaro (2022)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Labor Relations of Local Jurisdiction), 2024.

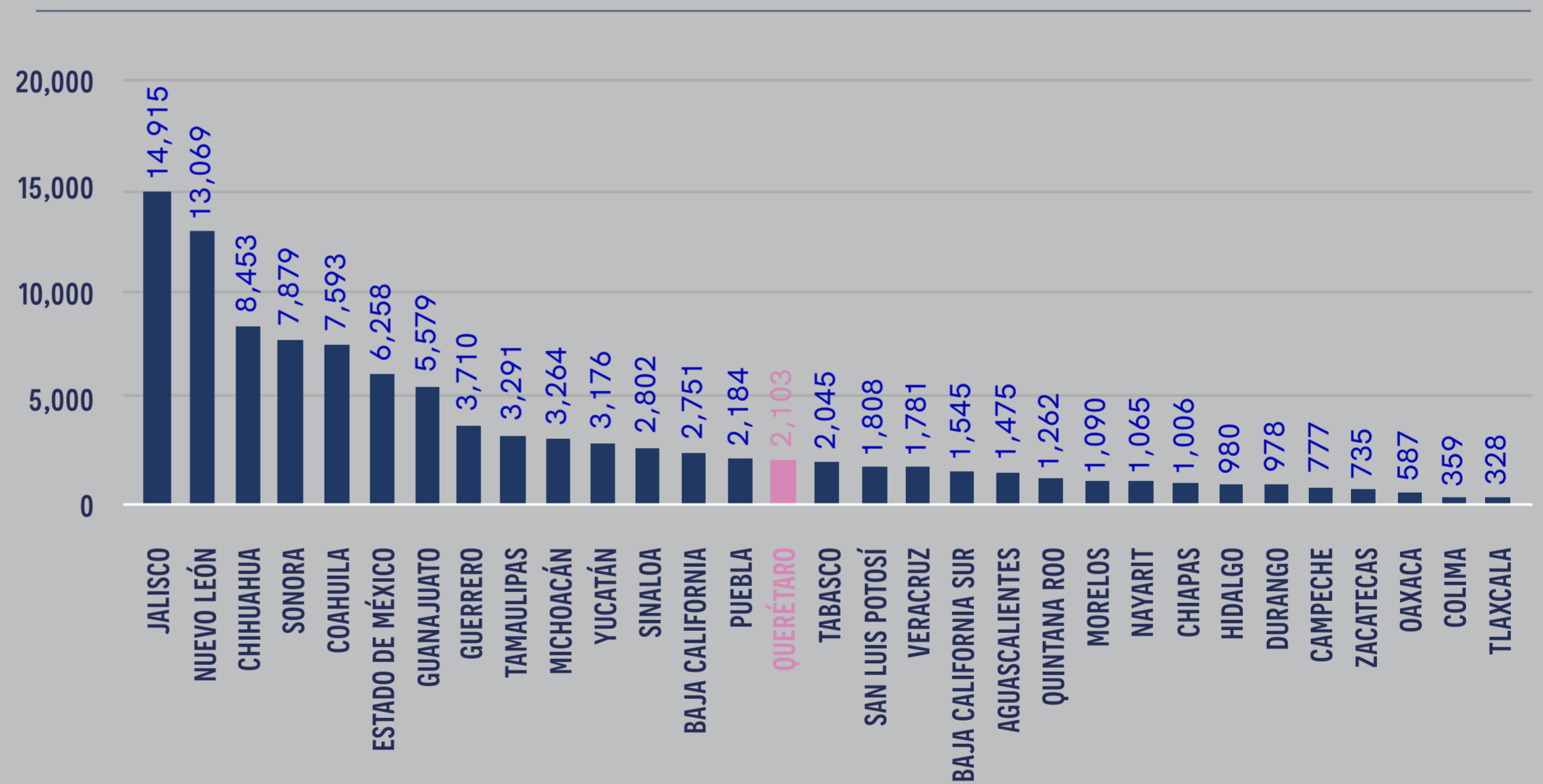




### Labor Disputes Register

Regarding labor disputes, in 2022, 138,420 were registered nationwide. In Querétaro, 2,103 were observed, representing 1.5% of the national total, placing it as the 17th state with the lowest number of registrations.

Labor disputes by state (2022)

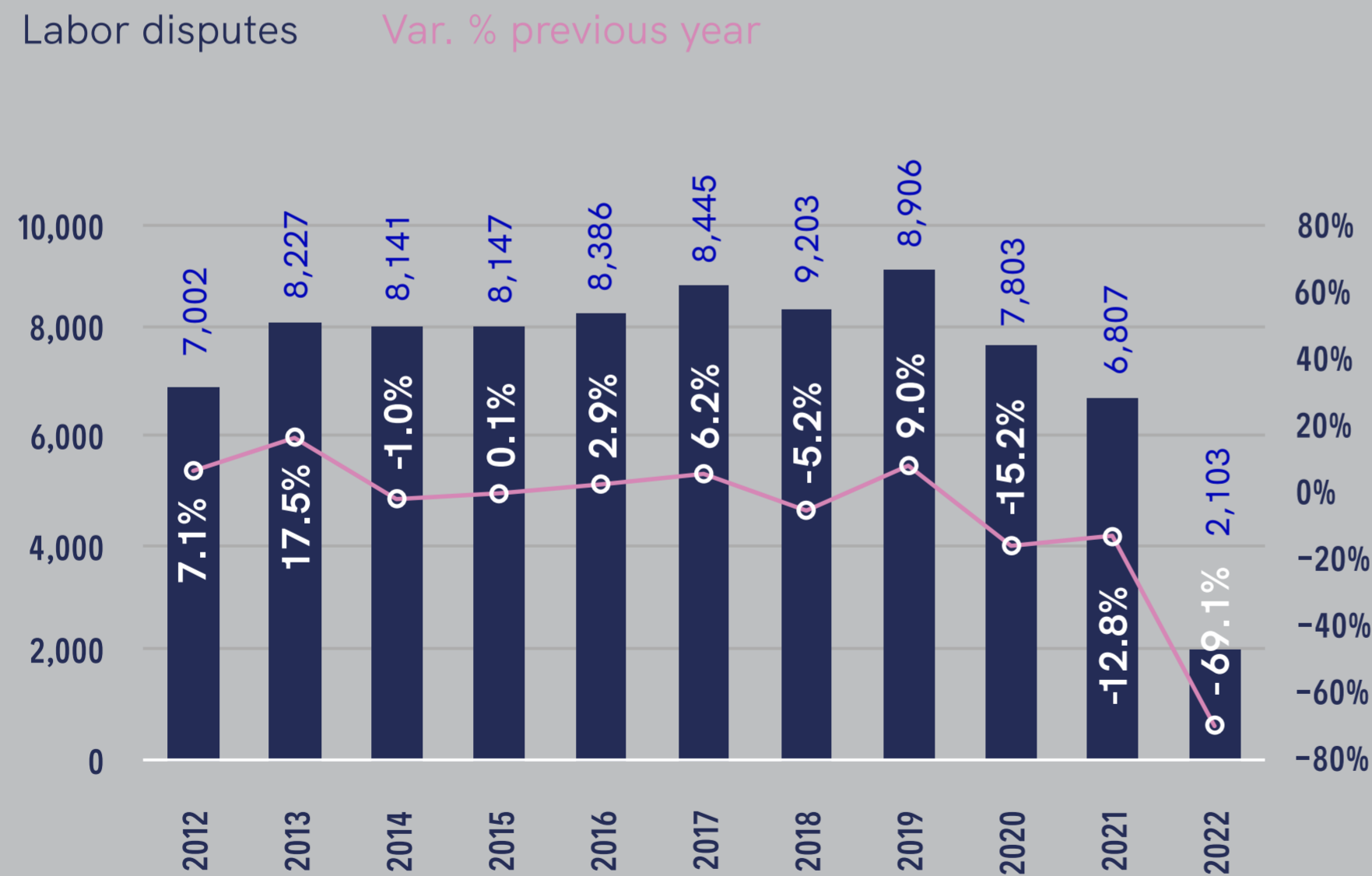


Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Labor Relations of Local Jurisdiction), 2024. Note: For illustrative purposes, Ciudad de México was not included in the graph; however, it is the state with the highest number of labor disputes with 33,572.



From 1991 to 2022, there is a record of 154,456 labor disputes in the state, being 1.3% collective disputes and 98.7% individual disputes. In 2022, of the total, 0.3% were collective and 99.7% individual.

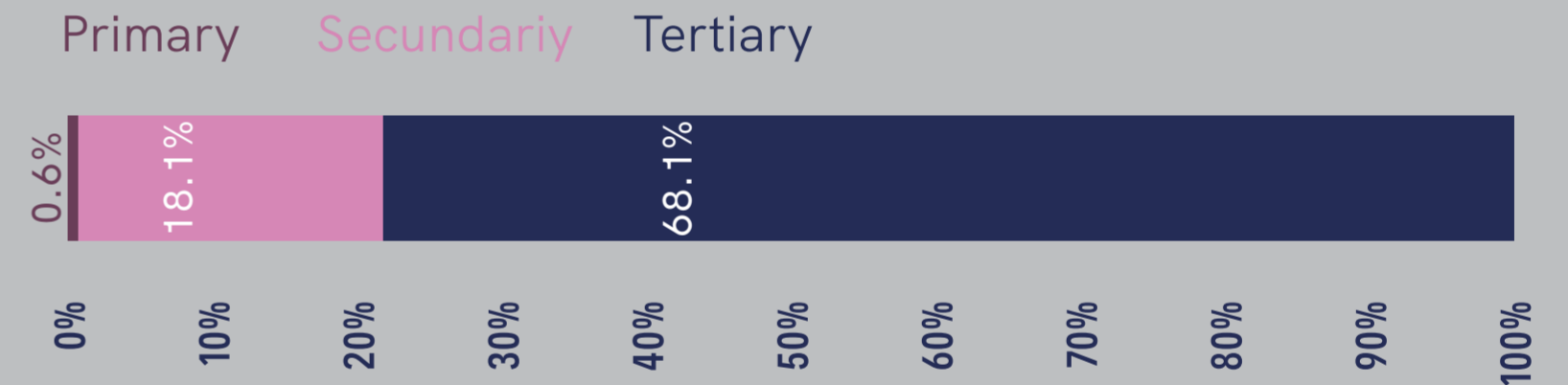
### Labor disputes in Querétaro (2012-2022)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Labor Relations of Local Jurisdiction), 2024.

With respect to economic activity, 0.6% (13) of the labor disputes occurred in primary activity, 18.1% (381) in secondary activity and 68.1% (1,432) in tertiary activity.

### Distribution of labor disputes by economic activity in Querétaro (2022)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Labor Relations of Local Jurisdiction), 2024.

On November 3, 2021, the Labor Conciliation Center of the State of Querétaro, a decentralized public agency of the State Public Administration and part of the Ministry of Labor, began operations. Its purpose is to offer workers and employers settlement services in their differences, strictly adhering to legal regulations, with the commitment to achieve consensus in balance and reasonableness, respecting their rights and obligations.



3.2

# Human development

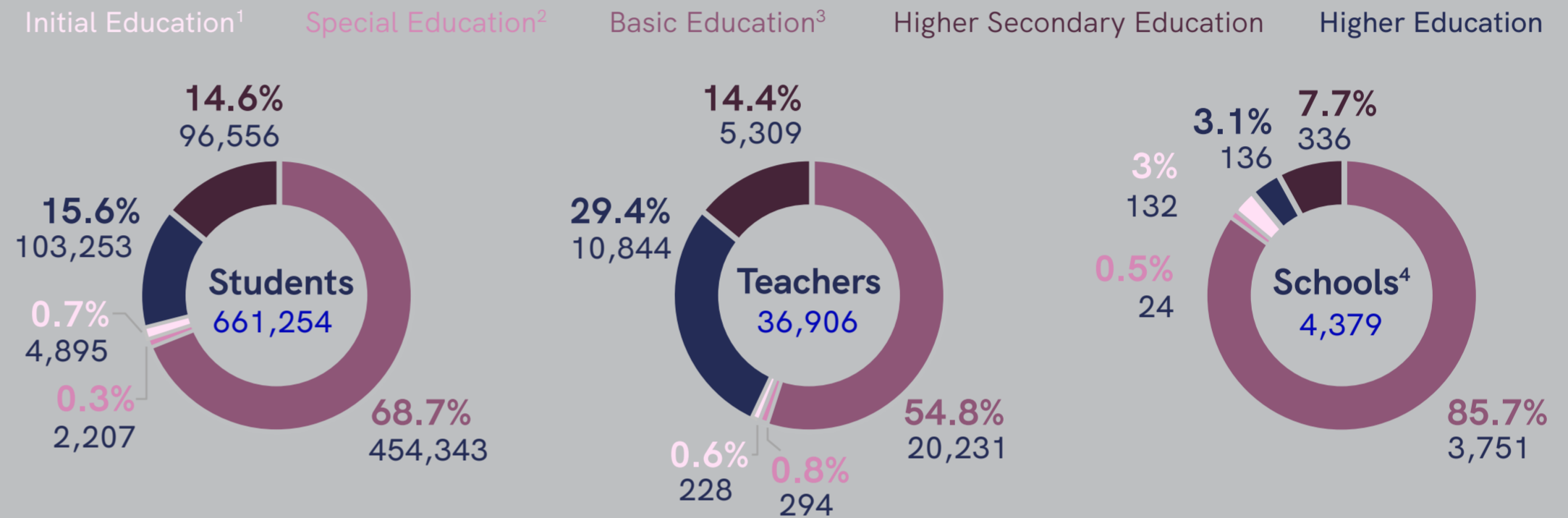
3.2.1

## Education

Education is a tool that allows citizens to develop knowledge, form their own criteria and provide them with the skills to adapt optimally to any situation.

In the state, it is structured in four stages: initial, basic, middle, high school and higher education. In addition to these four phases, special education is considered, which caters to gifted students and those with disabilities.

### Statistics in Querétaro (School year 2023-2024)



Source: Prepared by the authors with data from the Unit of Services for Basic Education in the State of Querétaro (Directorate of Educational Planning), 2024.

Note: <sup>1</sup> School-based system

<sup>2</sup> In addition, 7,998 students enrolled at different educational levels and served through the Regular Education Support Service Units (USAER, by its Spanish acronym) are served in special education, and are therefore not included in the total enrollment. The data referred to in this table correspond to the attention of the Multiple Attention Center (CAM, by its Spanish acronym).

<sup>3</sup> Includes 719 students served and 27 teachers of 1st grade of preschool in initial education.

<sup>4</sup> From the 2021-2022 cycle onwards, schools and not institutions will be counted at the higher level.

In the 2023-2024 school year, the number of students registered in Querétaro was 661,254, compared to the number of students registered during the 2022-2023 school year, the figure reported an increase of 1%, or 6,535 more students.

During the same period, the number of teachers decreased by 0.6% to 36,906. Schools increased 1% to 4,379 units.



Of the total number of students registered in the state, 75.8% were concentrated in public institutions and 24.2% in private institutions. For teachers, the distribution was 62.3% and 37.7%, while for schools it was 73.9% and 26.1%, respectively.

### Statistics by type of support in Querétaro (School year 2023-2024)

LEVEL	PUBLIC SUPPORT <sup>5</sup>			PRIVATE SUPPORT		
	STUDENTS	TEACHERS	SCHOOLS <sup>4</sup>	STUDENTS	TEACHERS	SCHOOLS <sup>4</sup>
Initial Education <sup>1</sup>	397	39	12	4,498	189	120
Special Education <sup>2</sup>	2,179	288	23	28	6	1
Basic Education <sup>3</sup>	371,891	14,644	2,980	82,452	5,587	771
Higher Secondary Education	71,489	2,889	175	25,067	2,420	161
Higher Education	55,144	5,139	44	48,109	5,705	92
<b>Total</b>	<b>501,100</b>	<b>22,999</b>	<b>3,234</b>	<b>160,154</b>	<b>13,907</b>	<b>1,145</b>

Source: Prepared by the authors with data from the Unit of Services for Basic Education in the State of Querétaro (Directorate of Educational Planning), 2024.

Note: <sup>1</sup> School-based system

<sup>2</sup> In addition, 7,998 students enrolled at different educational levels and served through the Regular Education Support Service Units (USAER), are served in special education, and are therefore not included in the total enrollment. The data referred to in this table correspond to the attention of the Multiple Attention Center (CAM, by its Spanish acronym).

<sup>3</sup> Includes 719 students served and 27 teachers of 1st grade of preschool in initial education.

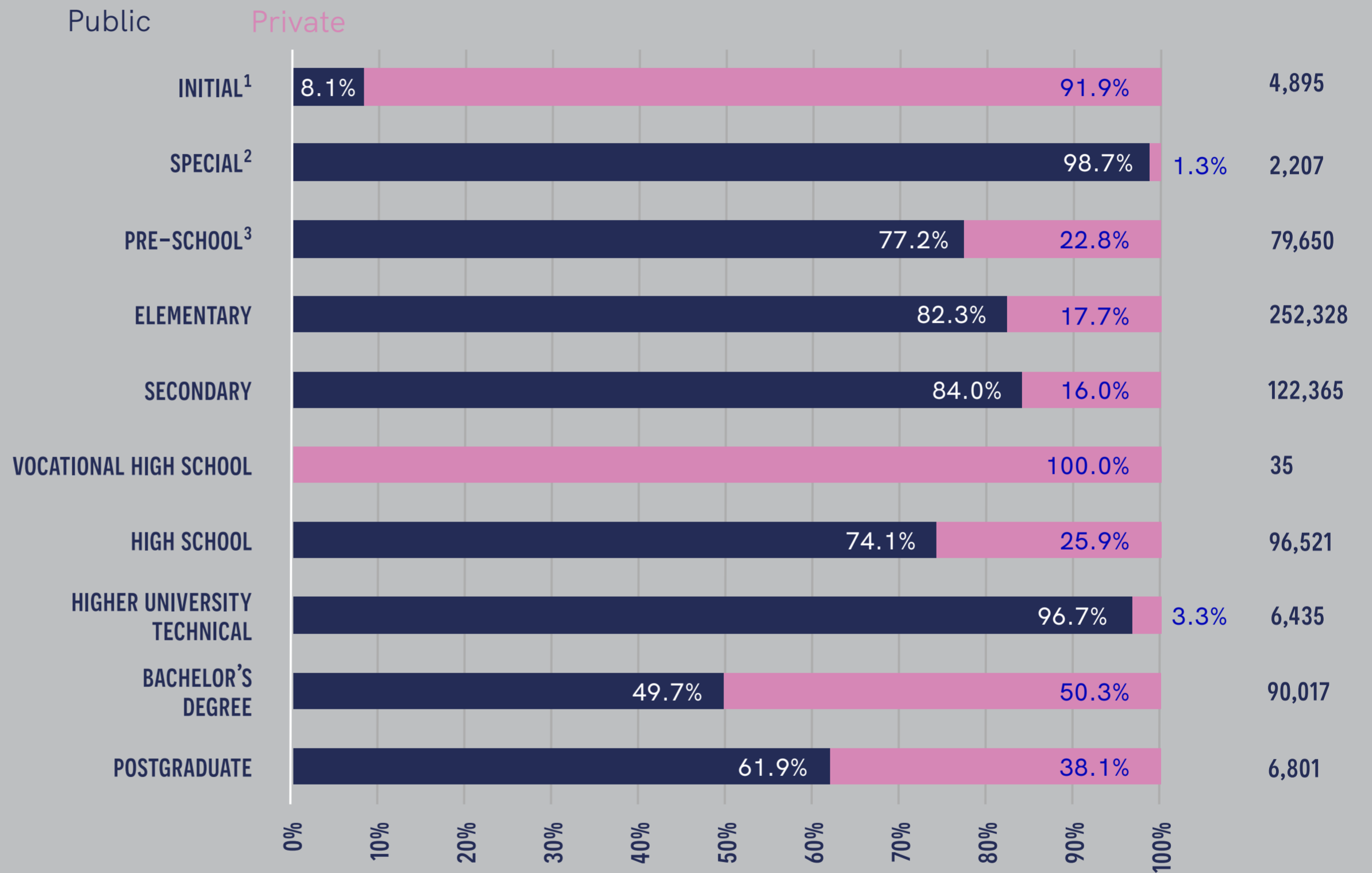
<sup>4</sup> From the 2021-2022 cycle onwards, schools and not institutions will be counted at the higher level.

<sup>5</sup> Public Support includes Federal, State, Federal Transferred and Autonomous support.



During the 2023-2024 school year, the primary education level concentrated 252,328 students, that is, 38.2% of the total number of students in the state, followed by junior high school with 122,365 (18.5%) and high school with 96,521 (14.6%).

### Distribution of students by type of support by level of education (School year 2023-2024)



Source: Prepared by the authors with data from the Unit of Services for Basic Education in the State of Querétaro (Directorate of Educational Planning), 2024.

Note: <sup>1</sup> Only school-based system

<sup>2</sup> In addition, special education serves 7,998 students enrolled in elementary schools who are served through the Regular Education Support Service Units (USAER); therefore, they are not included in the total enrollment. The data referred to in this table correspond to the attention of the Multiple Attention Center (CAM, by its Spanish acronym).

<sup>3</sup> Includes 719 students served and 27 teachers of 1st grade of preschool in initial education.

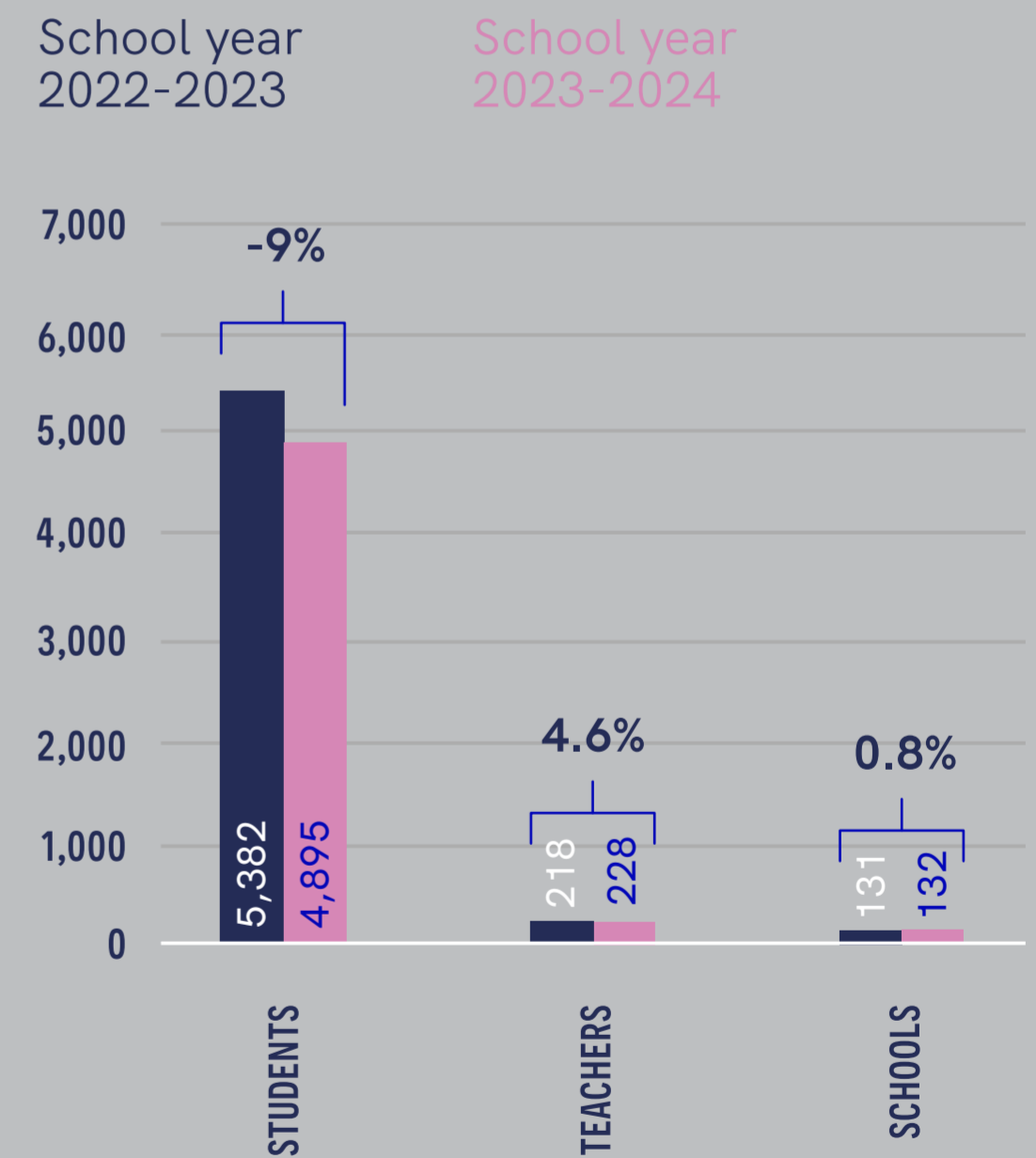


### Initial Education

It is the training provided to children under 3 years of age with the objective of enhancing their integral and harmonious development to enable them to obtain skills, habits, values, autonomy, creativity and attitudes that will be necessary for their personal and social performance.

Despite the importance of early education, during the 2023-2024 school year, only 0.7% of the total number of students in the state will be at this level.

### Initial education enrollment<sup>1</sup> in Querétaro (School year 2022-2023/2023-2024)



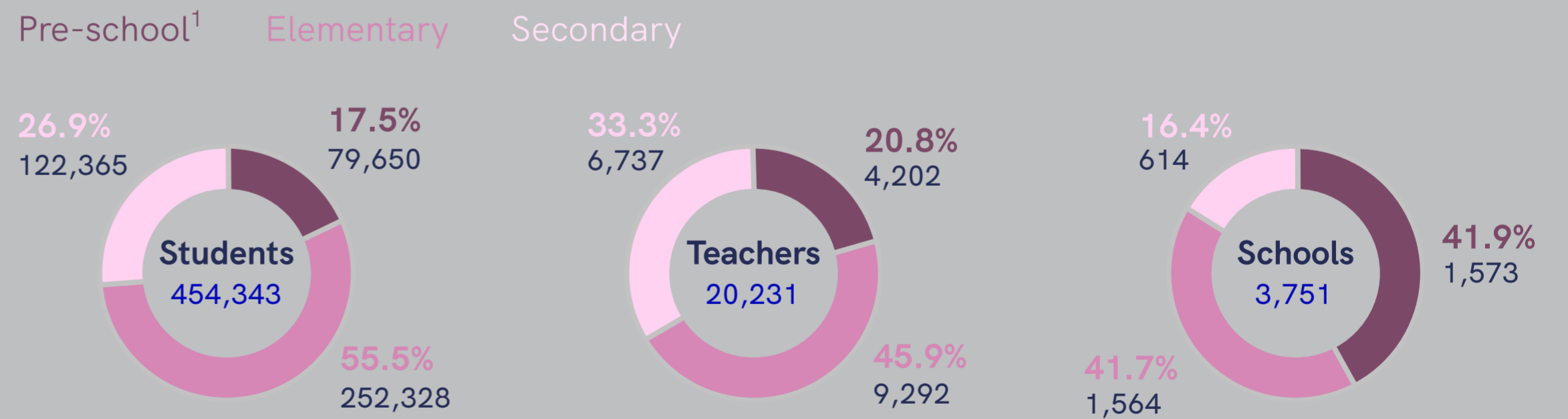
Source: Prepared by the authors with data from the Unit of Services for Basic Education in the State of Querétaro (Directorate of Educational Planning), 2024.  
Note: <sup>1</sup>School-based system



### Basic Education

It comprises three educational levels: preschool, elementary and high school. Within the state, this educational level concentrates the largest number of students. In the 2023-2024 school year, 454,343 students were enrolled, 0.2% less than in the 2022-2023 period. Of the total, 55.5% were in elementary school, 26.9% in secondary school and 17.5% in preschool.

### Basic education enrollment in Querétaro (School year 2023-2024)



Source: Prepared by the authors with data from the Unit of Services for Basic Education in the State of Querétaro (Directorate of Educational Planning), 2024.

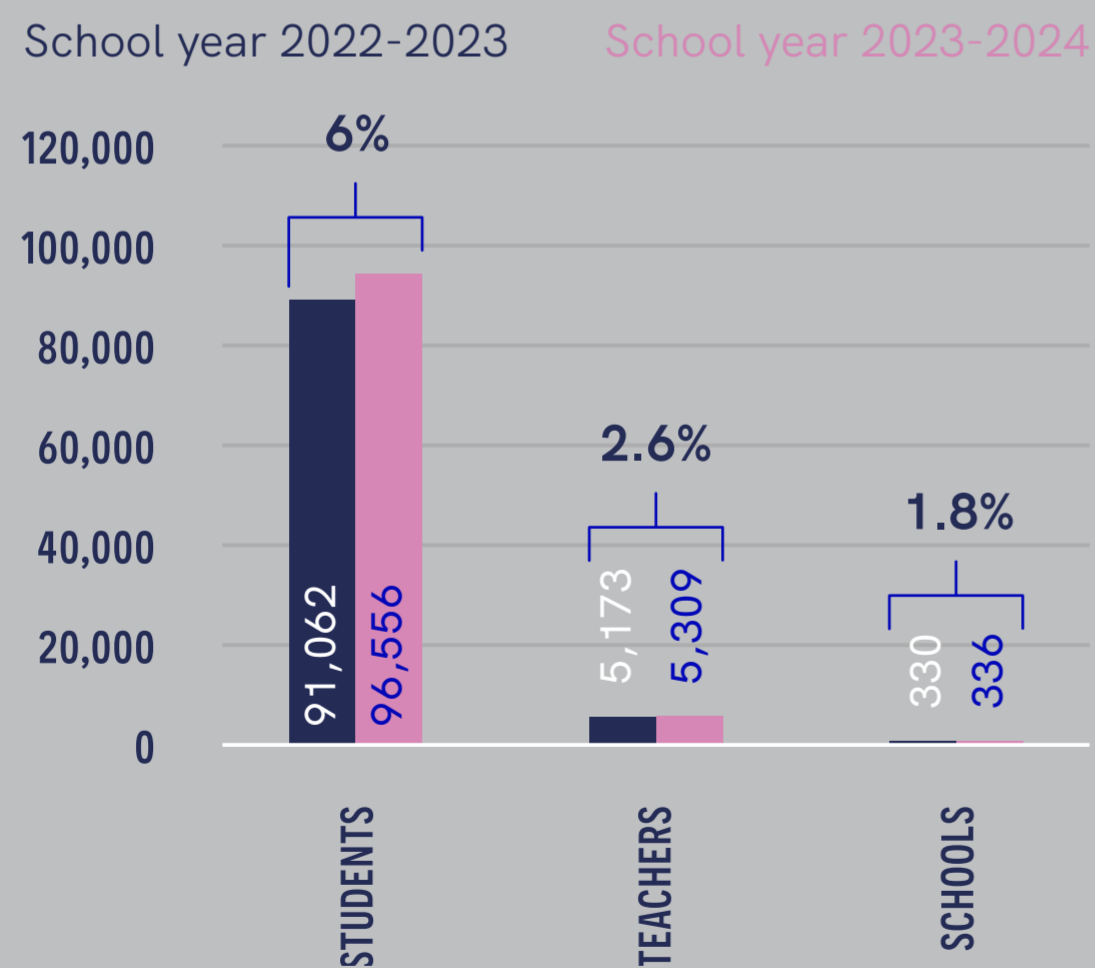
Note: <sup>1</sup>Includes 719 students served and 27 teachers from 1st grade of preschool in the initial education level.



### Higher Secondary Education

This level of education accounted for 14.6% of the total number of students in the state during the 2022-2023 school year, that is, 96,556 students, an increase of 6% with respect to the 2022-2023 period.

#### Statistics of higher secondary education in Querétaro (School year 2022-2023/2023-2024)



Source: Prepared by the authors with data from the Unit of Services for Basic Education in the State of Querétaro (Directorate of Educational Planning), 2024.

Of the total number of registered students, 69.1% are in a general high school, 30.8% in a technological high school and only 0.04% in a vocational high school.

#### Higher secondary education enrollment by municipality and system (School year 2023-2024)

MUNICIPALITY	GENERAL HIGH SCHOOL	TECHNOLOGICAL HIGH SCHOOL	VOCATIONAL HIGH SCHOOL	TOTAL
Amealco de Bonfil	1,744	482	0	2,226
Arroyo Seco	698	0	0	698
Cadereyta de Montes	2,615	0	0	2,615
Colón	606	1,392	0	1,998
Corregidora	5,063	4,461	0	9,524
El Marqués	4,721	1,116	0	5,837
Ezequiel Montes	1,930	48	0	1,978
Huimilpan	225	762	0	987
Jalpan de Serra	1,089	0	0	1,089
Landa de Matamoros	853	0	0	853
Pedro Escobedo	516	2,522	0	3,038
Peñamiller	489	274	0	763
Pinal de Amoles	675	238	0	913
Querétaro	33,767	12,260	26	46,053
San Joaquín	503	0	0	503
San Juan del Río	8,137	4,500	9	12,646
Tequisquiapan	1,822	1,700	0	3,522
Tolimán	1,313	0	0	1,313
<b>Total</b>	<b>66,766</b>	<b>29,755</b>	<b>35</b>	<b>96,556</b>

Source: Prepared by the authors with data from the Unit of Services for Basic Education in the State of Querétaro (Directorate of Educational Planning), 2024.

Note: As of the 2019-2020 cycle for the Centers of Technological Studies in Continental Waters, the basic component corresponds to the Technological high school service. The intermediate professional is defined as a technical professional service (terminal) in the SEP (by its acronym in Spanish) questionnaire F911.





### College of Technical Professional Education of the State of Querétaro (CONALEP-QRO, by its Spanish acronym)

It is a decentralized public body of the state government, whose mission is to train competitive people as technical professionals, so that they can transform their lives and thus become agents of change that generate common good.

### Campuses and educational offerings by area

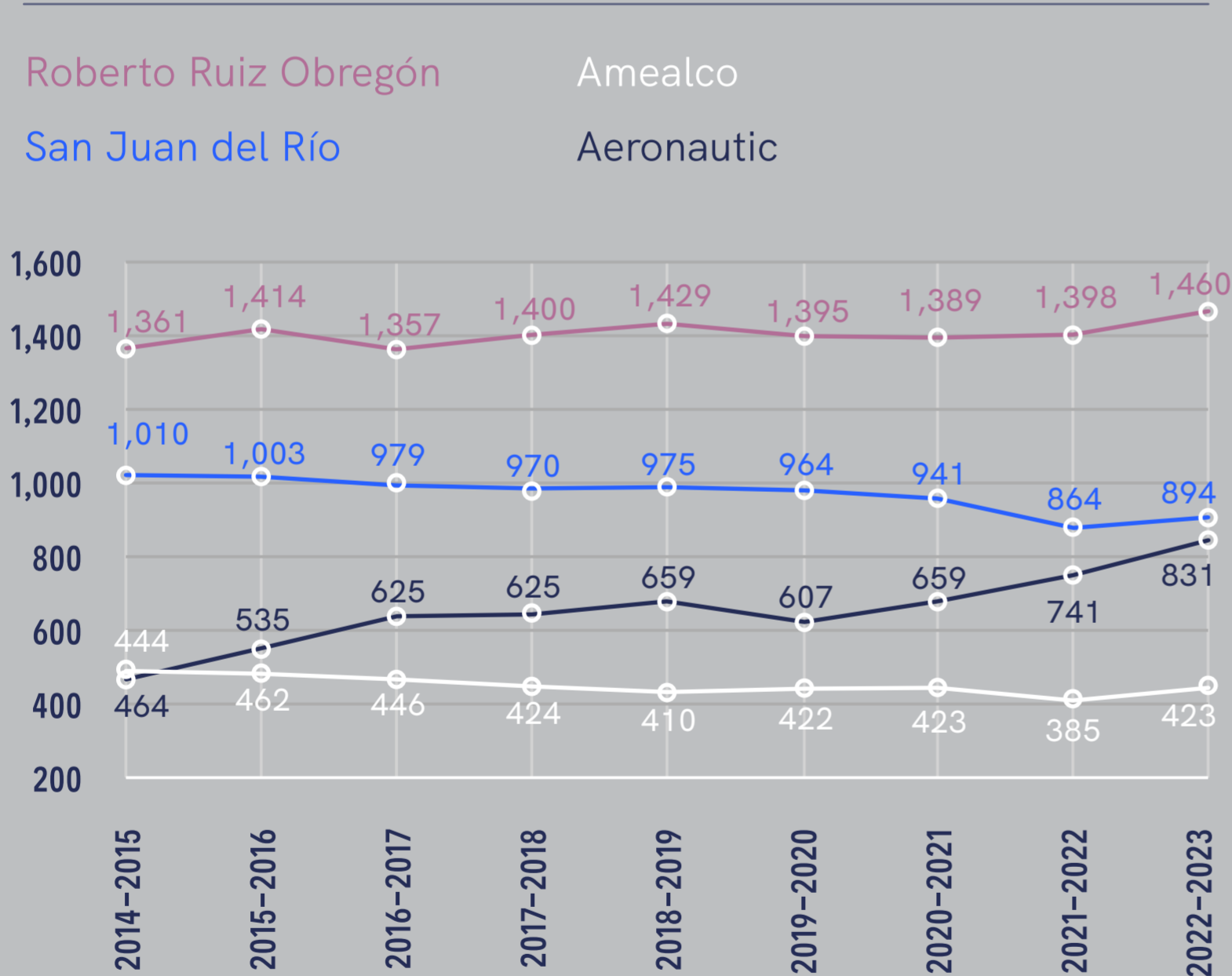
CAMPUSES	EDUCATION OFFER
Aeronáutico	Aviation Electronic Systems
	Aircraft Lamination and Coating
	Mechatronics
Amealco	Food and beverages
	IT
Automotive José Vasconcelos, Querétaro	Machine Tools
	Automotive Industry
	Autotronics
	Quality control
Roberto Ruiz Obregón, Querétaro	Food and beverages
	IT
	Machine Tools
	Industrial Electromechanics
San Juan del Río	Data Science and Artificial Intelligence
	Food and beverages
	Industrial Electromechanics
	Industrial Productivity
	Industrial Chemistry
	Automotive Industry

Source: Prepared by the authors with data from the Technical Professional Education School in Querétaro, 2024.



During the 2022-2023 school year, the enrollment at the four campuses shown in the following graph showed an increase with respect to the 2021-2022 school year: Aeronáutico 12.1%; Amealco 9.9%; Roberto Ruíz Obregón 4.4%; San Juan del Río 3.5%.

### Enrollment by campus (School year 2014-2015/2022-2023)



Source: Prepared by the authors with data from the Technical Professional Education School in Querétaro, 2024.

Note: The "Automotive José Vasconcelos" campus is not reported, since there is only a record of enrollment for one school year (2021-2022, the period in which it was opened); for that period, the value reported was 205.

The number of graduates at the end of the 2022-2023 school year was higher at the Roberto Ruiz Obregón campus, with 259 students graduated, a figure 0.8% lower than that reported for the 2021-2022 school year; the San Juan del Río campus registered 242 graduates (15.2% growth); the Aeronáutico campus 164 (26.2% growth); and Amealco 99 (3.9% decrease).

For the 2022-2023 school year, the dropout rate has decreased significantly with respect to the 2021-2022 school year, an aspect that favors the fulfillment of the institution's main mission.

### Academic and personnel information by campus in Querétaro (School year 2021-2022/2022-2023)

CAMPUS	STUDENTS BENEFITING FROM SOME TYPE OF SUPPORT		DROPOUT RATE AT THE END OF THE SCHOOL YEAR		TEACHING, MANAGEMENT AND ADMINISTRATIVE STAFF	
	2021-2022	2022-2023	2021-2022	2022-2023	2021-2022	2022-2023
Aeronautic	666	770	14.3	10.4	72	60
Amealco	385	444	44.0	6.9	59	51
Roberto Ruiz Obregón	1,392	0	27.4	9	140	140
San Juan del Río	864	874	17.0	9.4	79	80

Source: Prepared by the authors with data from the Technical Professional Education School in Querétaro, 2024.



### College of Scientific and Technological Studies of the State of Querétaro (CECyTEQ, by its Spanish acronym)

It is a decentralized public body of the state government. Its objective is to broaden the educational offer so that secondary school graduates can access a technological high school, in order to facilitate their incorporation into the labor market with the required skills, as well as to induce students' vocational preferences.

### Educational institutions and educational offerings by areas

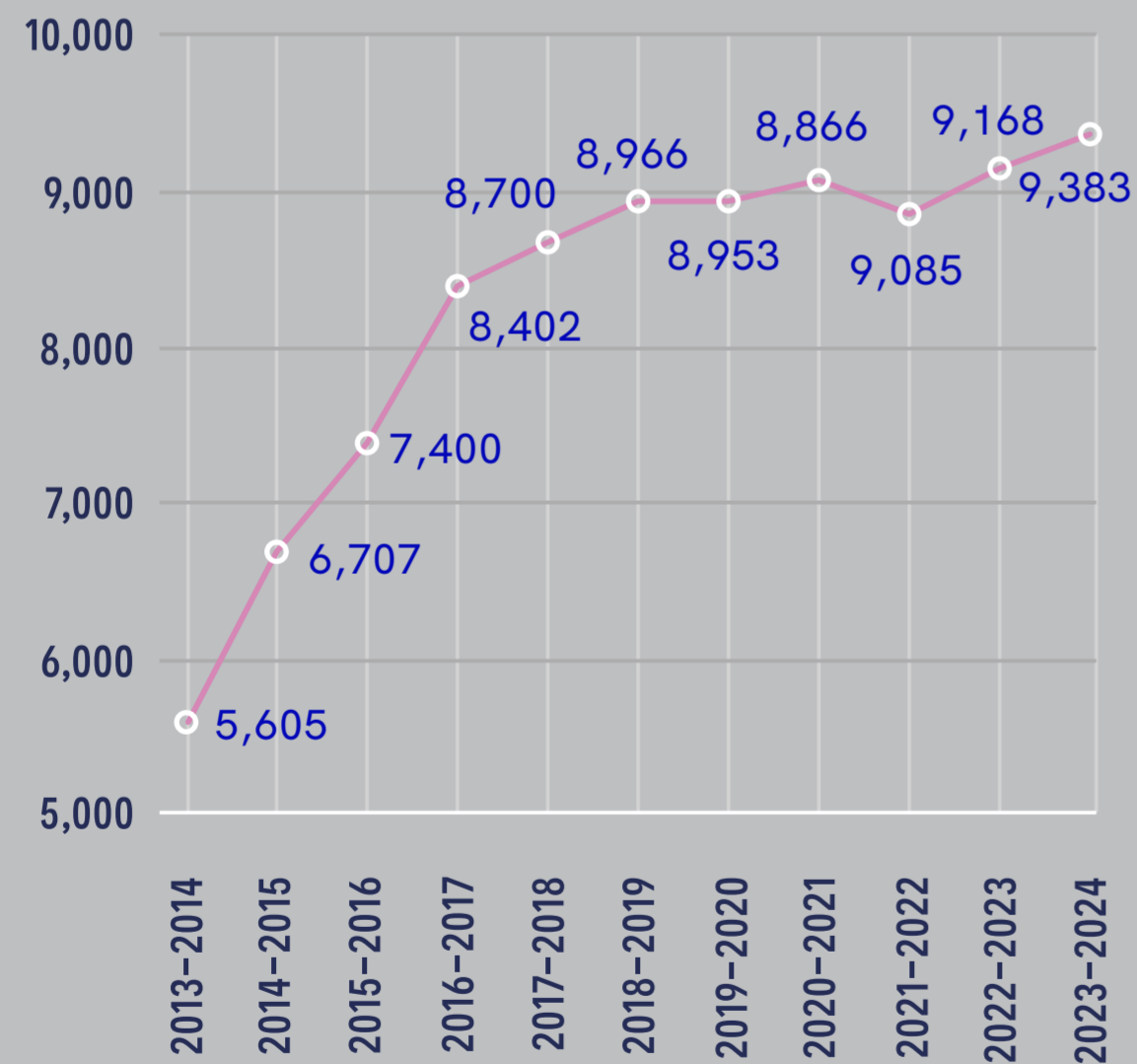
CAMPUSES	EDUCATION OFFER	CAMPUSES	EDUCATION OFFER
Corregidora	Programming	Montenegro	Industrial Production
	Administrative Management Processes		Administrative Management Processes
	Mechatronics		Mechatronics
	Logistics		Industrial Maintenance
Huimilpan	Biotechnology	Paso de Mata	Machine-Tools
	Programming		Administrative Management Processes
	Administrative Management Processes		Programming
	Industrial Maintenance		Electricity
La Esperanza	Mechatronics	Pedro Escobedo	Industrial Maintenance
	Industrial Maintenance		Logistics
	Electromechanics		Administrative Management Processes
	Administrative Management Processes		Computer Equipment Support and Maintenance
La Tinaja de la Estancia	Electromechanics	Peñamiller	Automotive Maintenance
	Administrative Management Processes		Administrative Management Processes
	Industrial Production		Programming
Menchaca	Administrative Management Processes	Pinal de Amoles	Administrative Management Processes
	Programming		Programming
	Mechatronics		Electronics
	Programming		Industrial Maintenance
San Juan del Río	Industrial Production	Querétaro	Mechatronics
	Industrial Processes (Engineering base)		Plastics Transformation
	Logistics		Administrative Management Processes

Source: Prepared by the authors with data from the School of Scientific and Technological Studies of the State of Querétaro, 2024.



Over the years, the number of students registered by CECyTEQ has maintained a growth trend. During the 2023-2024 school year, 9,383 students were reported, a figure that maintains an annual variation of 2.3%.

Enrollment registered by school year (School year 2013-2014/2023-2024)



Source: Prepared by the authors with data from the School of Scientific and Technological Studies of the State of Querétaro (general statistical information), 2024.

At the end of the February-June 2023 semester, 14 courses were offered, with the Administrative Management Processes course accounting for the largest number of students.

Enrollment by degree (Semester February-June 2022 / 2023<sup>1</sup>)

DEGREE	FEBRUARY-JUNE 2022	FEBRUARY-JUNE 2023
Administrative Management Processes	1,821	1,899
Mechatronics	1,458	1,488
Programming	1,418	1,462
Industrial Maintenance	1,044	1,095
Industrial Production	650	714
Logistics	576	621
Biotechnology	274	265
Electricity	154	162
Electronics	209	150
Plastics Transformation	123	139
Electromechanics	154	134
Automotive Maintenance	125	130
Machine-Tools	121	98

Source: Prepared by the authors with data from the School of Scientific and Technological Studies of the State of Querétaro (basic statistical information), 2024.  
Note: <sup>1</sup>Latest information available by degree.

For the same period, there were 12 campuses throughout the state, with the Querétaro Campus having the highest demand.

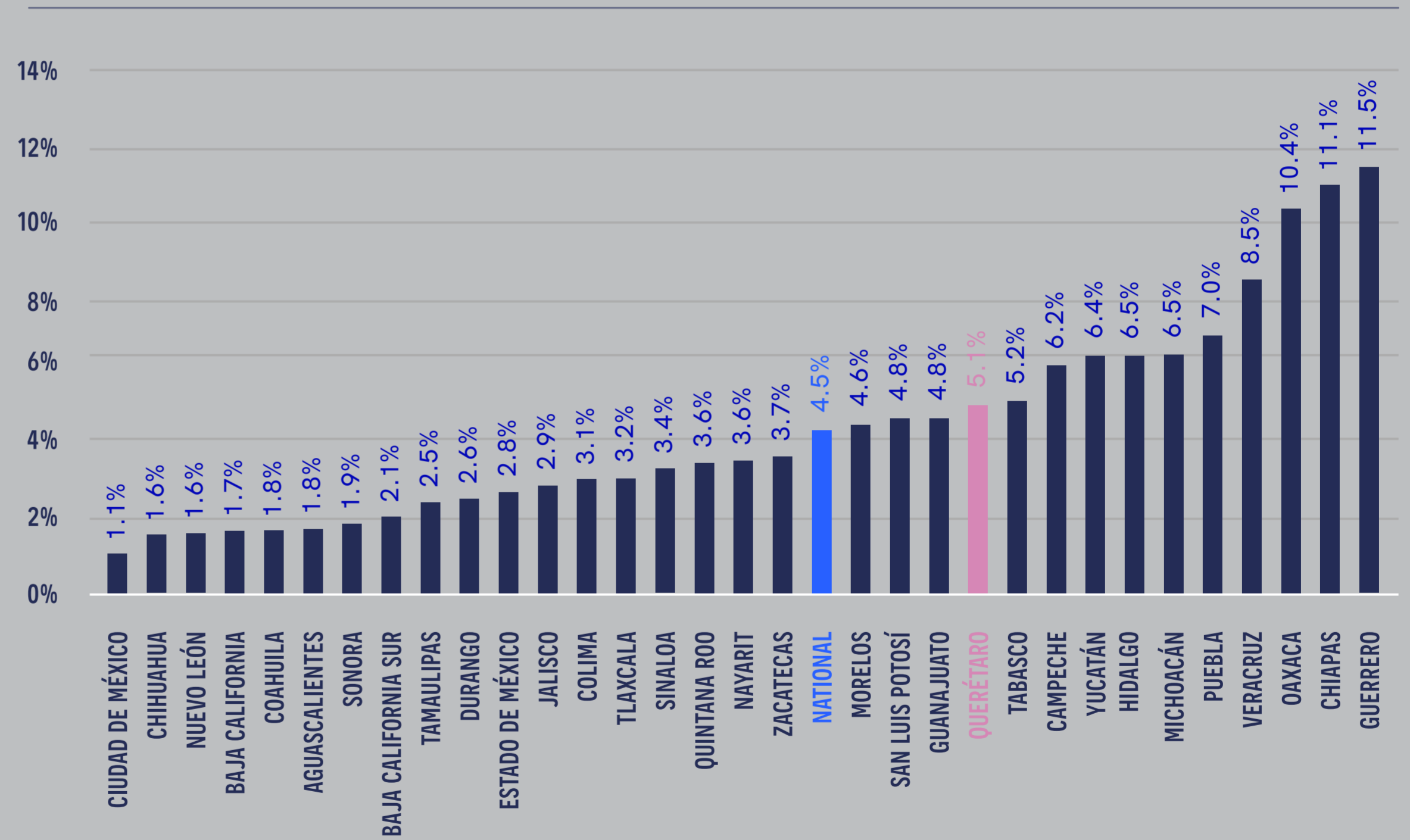
Enrollment by campus (Semester February-June 2022 / 2023<sup>1</sup>)

CAMPUS	FEBRUARY-JUNE 2022	FEBRUARY-JUNE 2023
Querétaro	1,699	1,680
Corregidora	1,364	1,393
Pedro Escobedo	1,106	1,162
Montenegro	734	786
Menchaca	608	653
Huimilpan	592	650
San Juan del Río	611	626
La Esperanza	326	352
Paso de Mata	383	348
Pañamiller	251	257
La Tinaja de la Estancia	206	226
Pinal de Amoles	247	224

Source: Prepared by the authors with data from the School of Scientific and Technological Studies of the State of Querétaro (basic statistical information), 2024.  
Note: <sup>1</sup>Latest information available by campus.



Illiteracy rate by state (2023)



### Illiteracy

According to the National Survey of Demographic Dynamics 2023, nationwide 4,470,201 people aged 15 and over are illiterate. Querétaro reported a total of 98,878 people, representing 2.2% of the national figure.

Source: Prepared by the authors with data from the National Institute of Statistics and Geography (National Survey of Demographic Dynamics), 2024.

Note: The calculation was made taking into account the population aged 15 years and older.



### 3.2.2

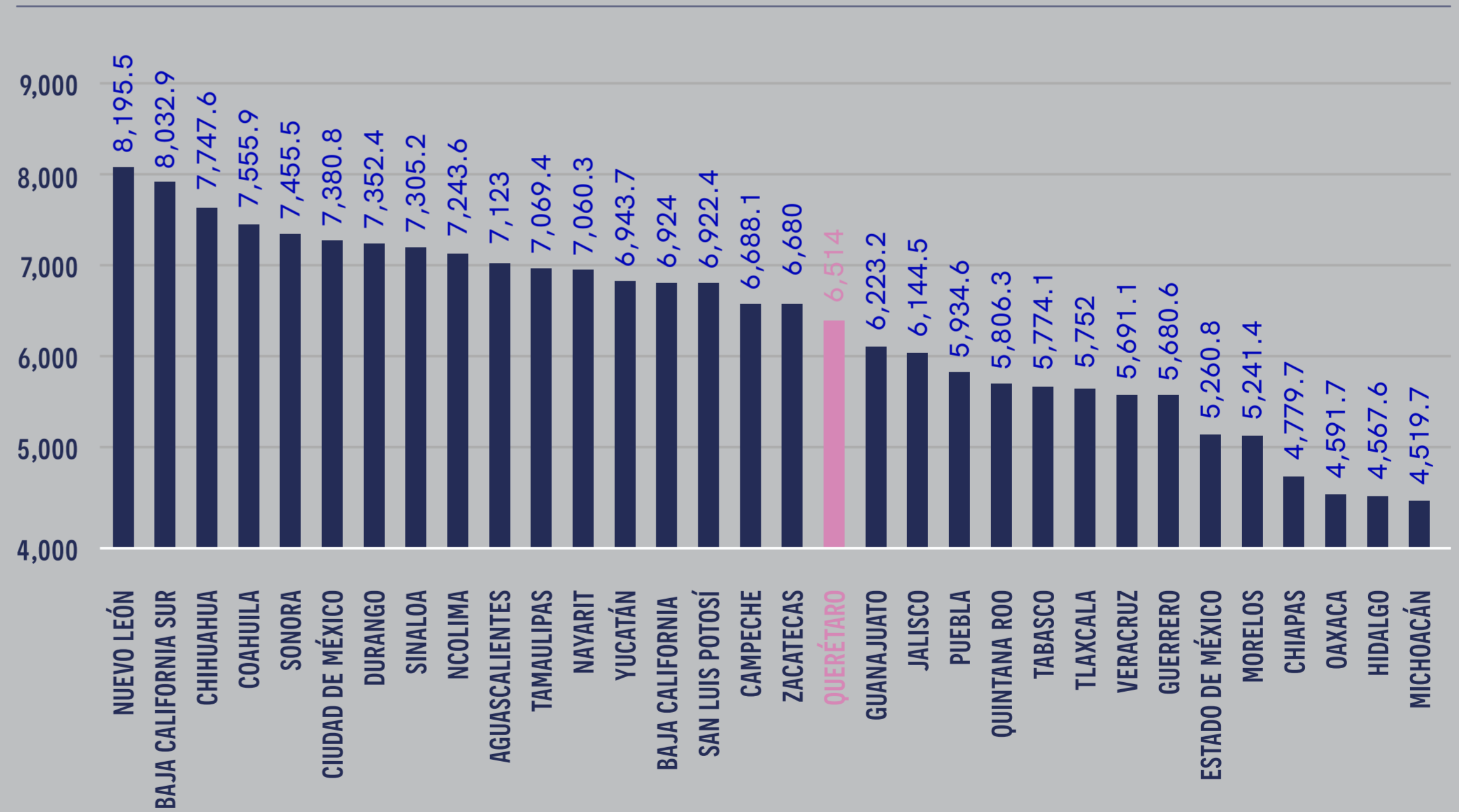
## Health

In the state, health services are provided through the Mexican Social Security Institute (IMSS, by its acronym in Spanish), the Health Services of the State of Queretaro (SESEQ, by its Spanish acronym), the Institute of Security and Social Services for State Workers (ISSSTE, by its Spanish acronym) and private health institutions. Together, these institutions allow citizens to have medical attention that allows them to have a better quality of life.

### Access to health services

In 2023, 80,377,109 people nationwide were affiliated with health services, Querétaro accounted for 2% of this number, or 1,622,038 people.

Population affiliated to health services per 10,000 inhabitants per state (2023)

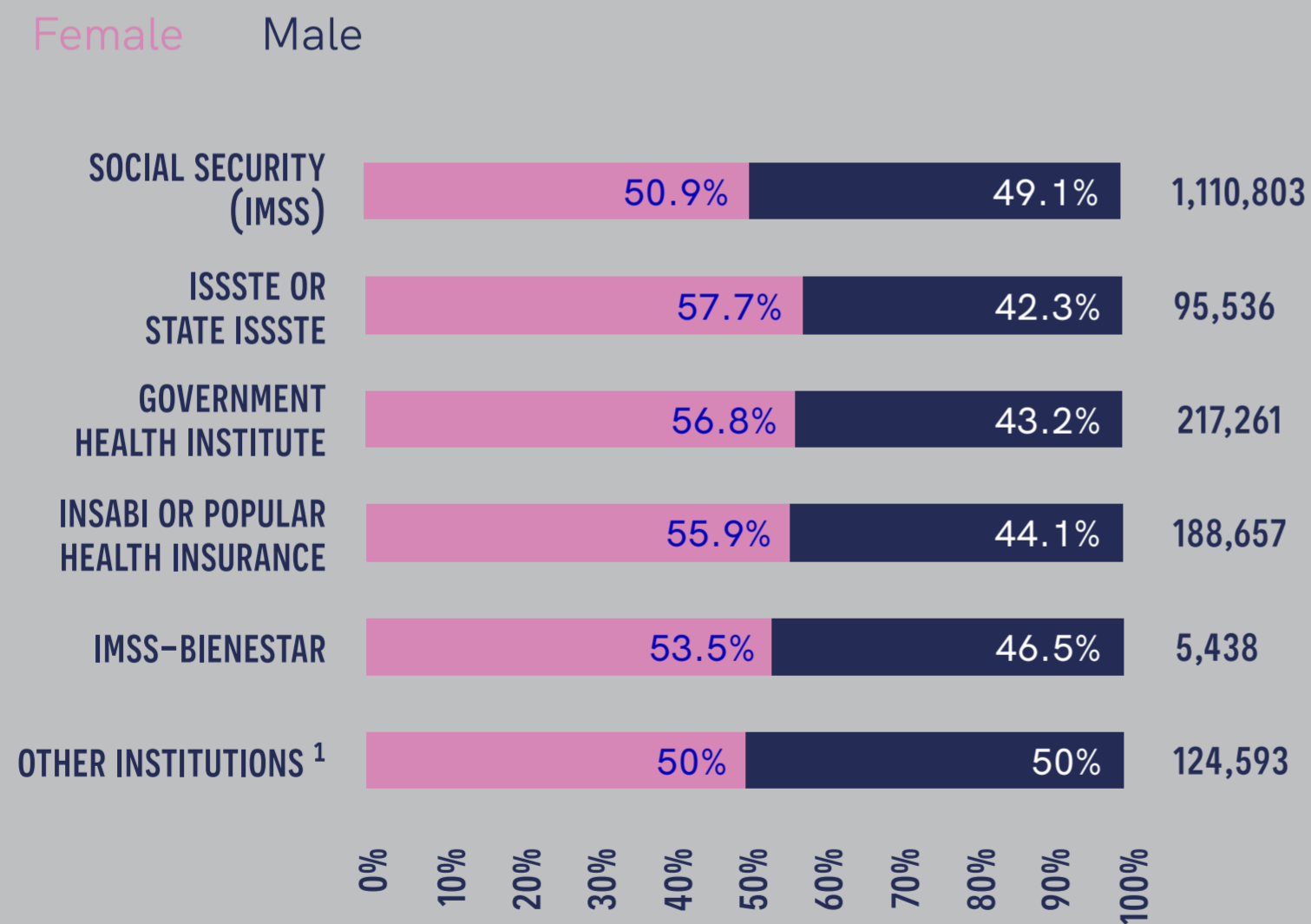


Source: Prepared by the authors with data from the National Institute of Statistics and Geography (National Survey of Demographic Dynamics), 2024.



Of the total population affiliated to health services in the state, 68.5% was affiliated to IMSS; 13.4% to a government health institute; 11.6% to INSABI (by its acronym in Spanish) or Seguro Popular (Popular Health Insurance); 7.7% to another institution; 5.9% to ISSSTE; and 0.3% to IMSS-Bienestar.

### Population affiliated to health institutions by sex in Queretaro (2023)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (National Survey of Demographic Dynamics), 2024.

Note: <sup>1</sup>Includes the population affiliated with PEMEX, Defense or Navy; private insurance and other institution.

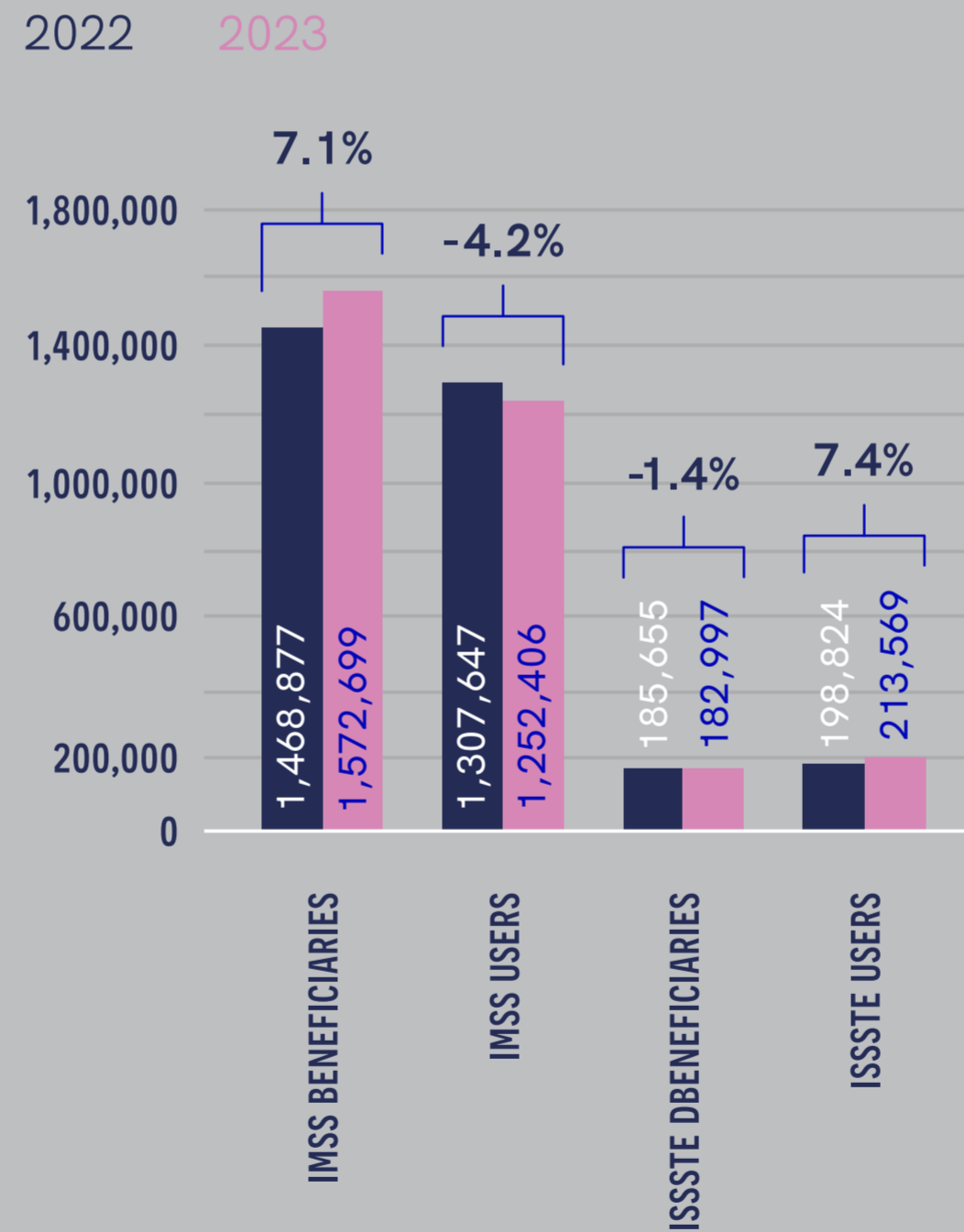




### Beneficiaries and users

In 2023, the number of people entitled to the Mexican Social Security Institute (IMSS, by its acronym in Spanish) was 1,572,699, while in the Institute of Security and Social Services for State Workers (ISSSTE, by its acronym in Spanish), this figure was 182,997. With respect to 2022, the former recorded an increase of 7.1%, while the latter showed a decrease of -1.4%.

Beneficiaries and user population by social security institution in Querétaro (December 2022-2023)



Source: Prepared by the authors with data from Health Services of the State of Queretaro (Mexican Social Security Institute and Institute of Security and Social Services for State Workers), 2024.

Querétaro is the municipality with the highest number of IMSS and ISSSTE beneficiaries, with 60.3% and 54.8%, respectively.

Beneficiary population by municipality in Querétaro (December 2023)

MUNICIPALITY	IMSS	ISSSTE
Amealco de Bonfil	13,503	3,245
Pinal de Amoles	0	1,276
Arroyo Seco	0	717
Cadereyta de Montes	14,195	4,906
Colón	16,386	2,383
Corregidora	118,849	17,115
Ezequiel Montes	12,629	2,326
Huimilpan	5,386	1,047
Jalpan de Serra	0	5,217
Landa de Matamoros	0	1,067
El Marqués	121,771	7,996
Pedro Escobedo	53,943	2,809
Peñamiller	0	956
Querétaro	947,908	100,328
San Joaquín	1,383	295
San Juan del Río	223,866	23,403
Tequisquiapan	37,806	5,010
Tolimán	5,074	2,901

Source: Prepared by the authors with data from Health Services of the State of Queretaro (Mexican Social Security Institute and Institute of Security and Social Services for State Workers), 2024.





### Health services infrastructure and equipment

Health services in Querétaro are offered through 5 hospitals, 2 of which are located in the municipality of Querétaro: 1) Specialties Hospital and 2) General Hospital of Querétaro. The rest are located in the districts of Cadereyta de Montes, Jalpan de Serra and San Juan del Río.

In 2023, the number of hospital beds showed a significant increase, mainly in the specialty hospital. The number of clinics increased slightly, while the rest of the hospital infrastructure categories remained the same.

### Hospital infrastructure of the Health Services in Querétaro (2022-2023)

HOSPITAL	HOSPITAL BEDS		OPERATING ROOMS		DELIVERY ROOMS		X-RAY CABINETS		DOCTOR'S OFFICES	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
Speciality	151	215	2	2	3	3	1	1	35	36
General Hospital of Querétaro	120	120	1	1	0	0	1	1	42	40
San Juan del Río	92	100	2	2	2	2	1	1	29	34
Cadereyta	64	64	1	1	1	1	1	1	10	9
Jalpan	30	30	1	1	1	1	1	1	12	14
<b>Total</b>	<b>457</b>	<b>529</b>	<b>7</b>	<b>7</b>	<b>7</b>	<b>7</b>	<b>5</b>	<b>5</b>	<b>128</b>	<b>133</b>

Source: Prepared by the authors with data from Health Services of the State of Queretaro, 2024.



At the state level, IMSS maintains a greater amount of material resources, however, the number of registered beneficiaries is 8.6 times greater than that of ISSSTE.

### Hospital infrastructure in social security institutions in Querétaro (December 2022-2023)

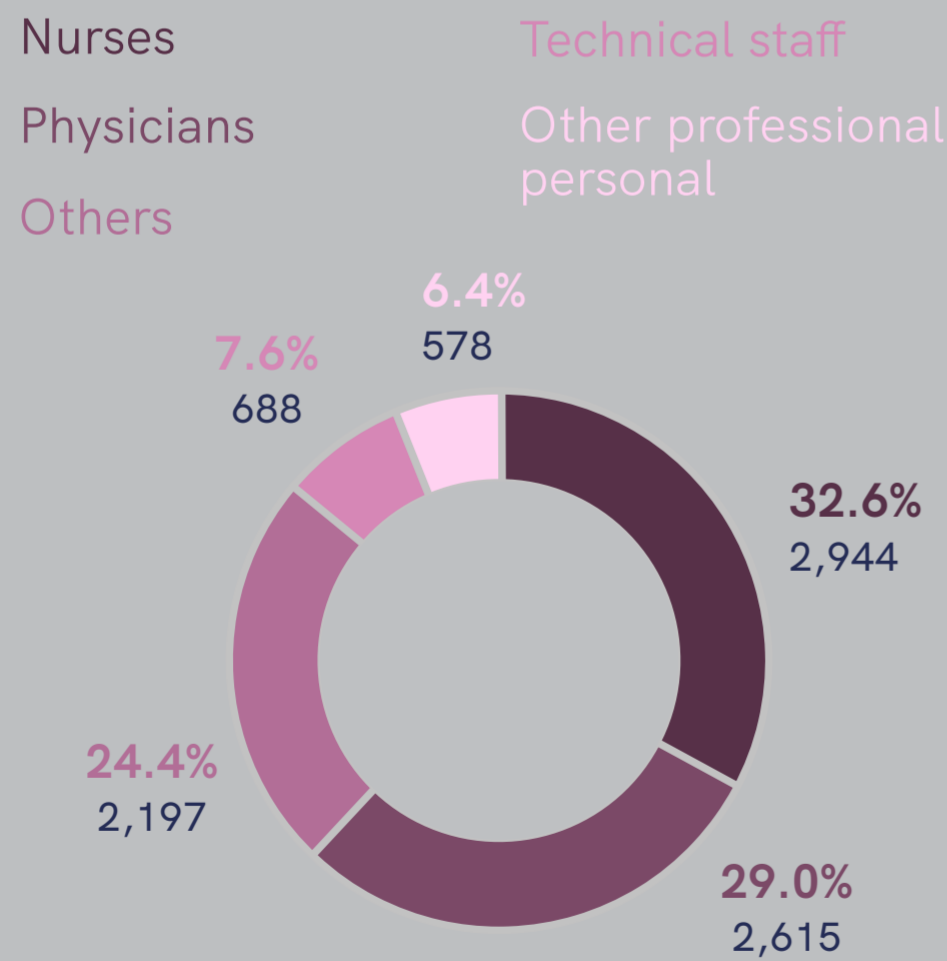
MATERIAL RESOURCES	IMSS		ISSSTE	
	2022	2023	2022	2023
Hospital beds	704	679	99	99
Non-Hospital beds	391	407	67	67
Incubators	22	53	4	14
Doctor's offices	365	381	84	74
Ambulances	10	21	11	5
Emergency areas	20	21	1	2
Intensive care areas	2	2	2	2
Laboratories	10	11	2	3
Radiology cabinets	17	17	3	6
X Ray equipment	19	19	10	10
Operating rooms	8	8	3	4
Delivery rooms	1	1	1	1
Blood banks	25	25	1	1
Drugstores	37	37	5	5

Source: Prepared by the authors with data from Health Services of the State of Queretaro (Mexican Social Security Institute and the Institute of Security and Social Services for State Workers), 2024.

## Human resources

The workforce involved in health services in 2023 was 9,022 people, representing an increase of 18.9% over 2022.

### Distribution of personnel in the health services in Querétaro (2023)



Source: Prepared by the authors with data from Health Services of the State of Querétaro, 2024.  
Note: Includes first level and second level.

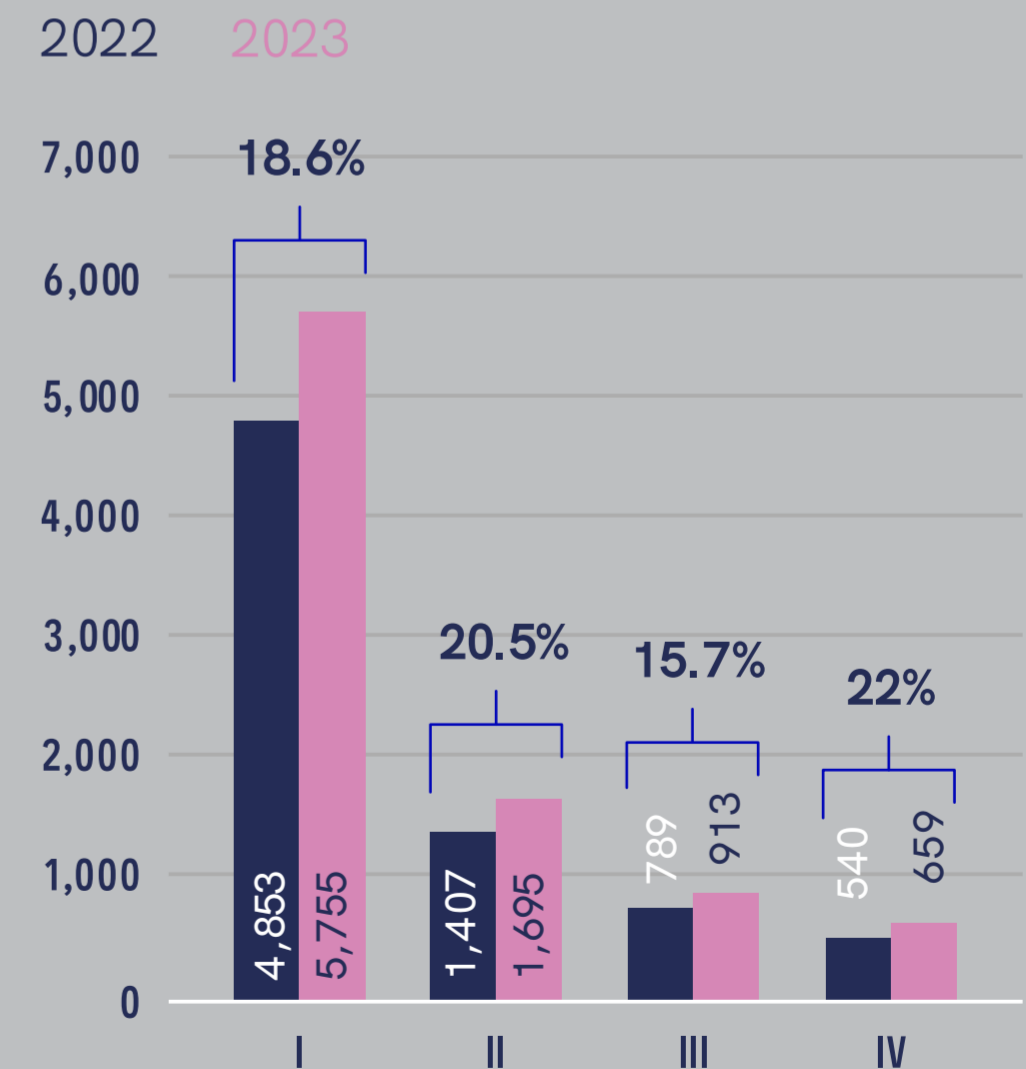


Health services are divided into four jurisdictions:

- ▶ I. Querétaro, Corregidora, El Marqués and Huimilpan.
- ▶ II. Amealco de Bonfil, Colón, Pedro Escobedo, San Juan del Río and Tequisquiapan.
- ▶ III. Cadereyta de Montes, Ezequiel Montes, Peñamiller, San Joaquín and Tolimán.
- ▶ IV. Pinal de Amoles, Arroyo Seco, Jalpan de Serra and Landa de Matamoros.

In 2023, the average annual growth of personnel in the four jurisdictions was 19.2%, while in 2022 it stood at 3.2%.

### Distribution of personnel in the health services in Querétaro by jurisdiction (2023)



Source: Prepared by the authors with data from Health Services of the State of Querétaro, 2024.



During 2023, IMSS had 9,248 people working, an increase of 8.6% over 2022. Of the total, 29.3% are medical personnel and 79.3% are non-medical personnel.

On the other hand, ISSSTE reported 1,123 employees, maintaining a 3.1% growth compared to 2022, with 39.9% being medical personnel and 63.2% non-medical.

### Inventory of the main human resources of social security institutions in the state of Querétaro (December 2023)

HUMAN RESOURCES	IMSS	ISSSTE
<b>Medical staff</b>	<b>2,495</b>	<b>435</b>
In direct contact with the patient	2,344	387
General physicians	91	63
Specialist physicians	1,421	141
Dentists	47	13
Residents	691	167
Interns	94	3
Other tasks	151	48
<b>Non-medical staff</b>	<b>6,753</b>	<b>688</b>
Paramedic staff	4,197	365
Infirmery	2,633	342
Auxiliar	864	94
General	1,097	149
Specialized	500	47
Interns	106	6
Others	66	46
Other paramedic staff	1,564	23
Auxiliary diagnostic and treatment services personnel	138	69
Administrative staff	1,626	140
Other staff	792	114
<b>Total</b>	<b>9,248</b>	<b>1,123</b>

Source: Prepared by the Health Services of the State of Queretaro with data from the Mexican Social Security Institute and Institute of Security and Social Services for State Workers, 2024.



3.2.3

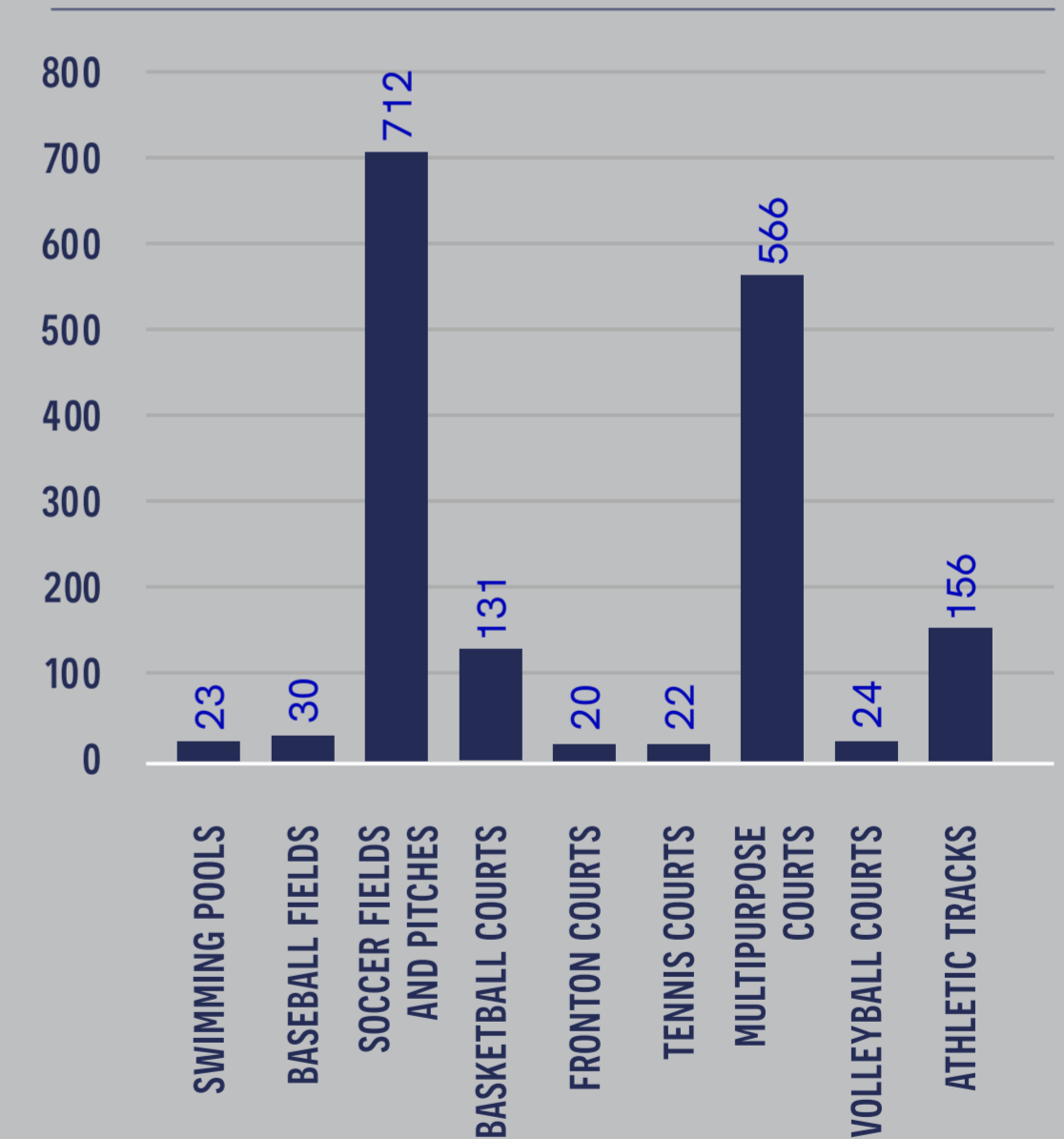
### Sports and Entertainment

The United Nations Educational, Scientific and Cultural Organization considers sport as a facilitator of development and peace in society, a promoter of tolerance and respect, as well as an element of empowerment for young people, children and women. Entertainment, on the other hand, is a fundamental element for the full and complete growth of individuals.

### Sports infrastructure

By the end of 2023, 1,684 sports and recreational spaces were registered in Querétaro. The largest number represent soccer fields and courts, followed by multi-purpose fields; together they represent 75.9% of the spaces

Number of sports facilities and infrastructure in Querétaro (December 2023)

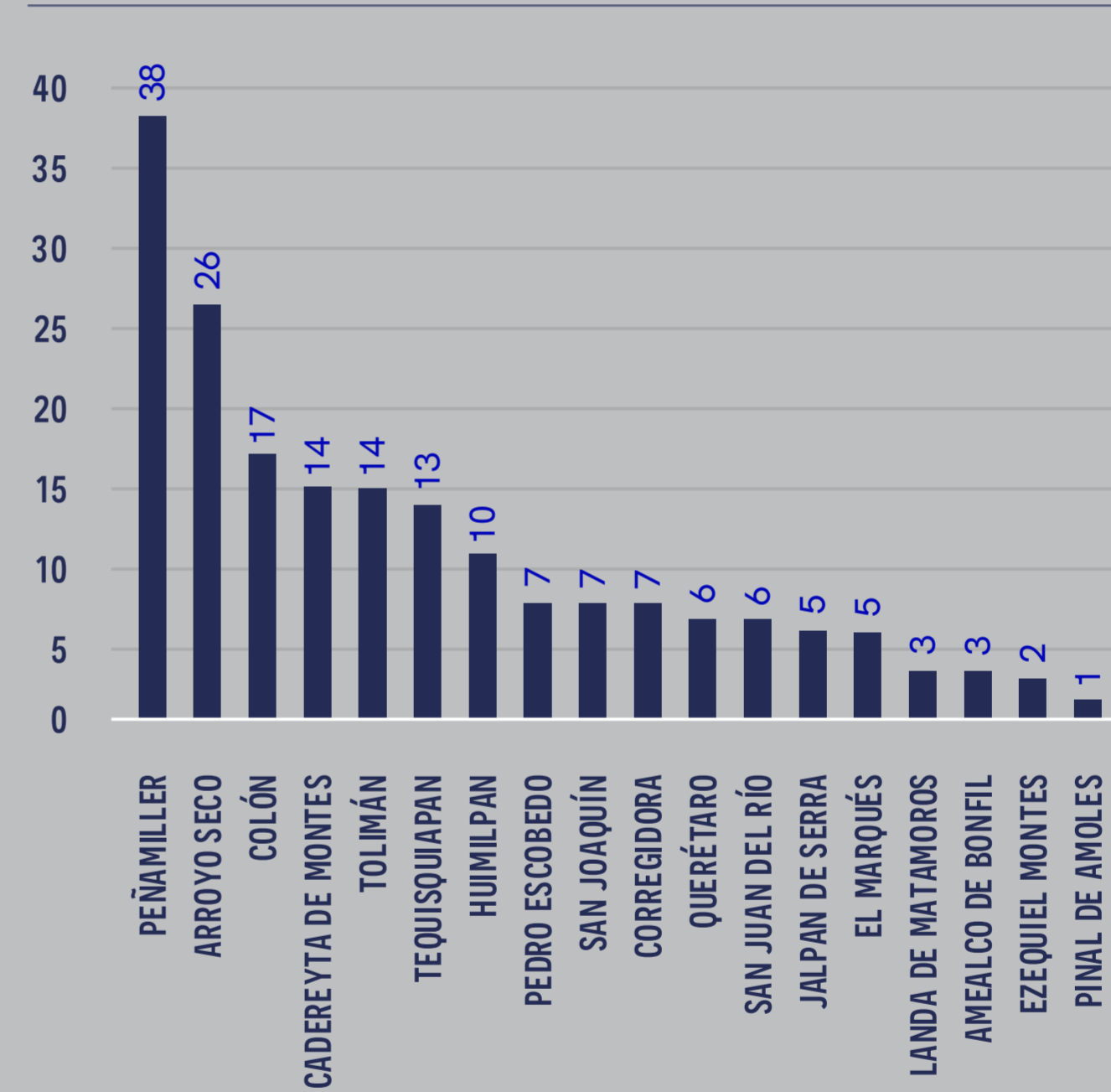


Source: Prepared by the authors with information from the Institute of Sports and Recreation of the State of Querétaro, 2024. Note: Only public spaces are considered. This information is constantly updated.



Peñamiller leads in the number of sports facilities per 10,000 inhabitants with 38 sites, followed by Arroyo Seco with 26 and Colón with 17.

Sports facilities per 10,000 inhabitants per municipality (2023)



Source: Prepared by the authors with information from the Institute of Sports and Recreation of the State of Querétaro, 2024.

Note: Of the 1,684 sports venues registered in the state, the distribution by municipality is as follows: Peñamiller - 72; Arroyo Seco - 34; Colón - 111; Cadereyta de Montes - 100; Tolimán - 40; Tequisquiapan - 96; Huimilpan - 38; Pedro Escobedo - 56; San Joaquín - 6; Corregidora - 140; Querétaro - 645; San Juan del Río - 173; Jalpan de Serra - 15; El Marqués - 122; Landa de Matamoros - 5; Amealco de Bonfil - 17; Ezequiel Montes - 11; and Pinal de Amoles - 3.



### Institute of Sports and Recreation of the State of Querétaro (INDEREQ, by its Spanish acronym)

INDEREQ aims to improve sports facilities and maintain them worthy for the different disciplines, as well as to make sports a daily practice in the state and renew the sports culture, through associations and social programs to contribute to the integral health of the person.

In 2023, a total of 4,624,527 visits were recorded in the Sports Units under INDEREQ's supervision and 11 sports facilities were rehabilitated, equipped and maintained in 8 municipalities in the state.

### Athlete participation in competitions

#### Participation in international competitions (2023)

COMPETITION	PARTICIPATING ATHLETES	OLYMPIC MEDALS
Central American and Caribbean Games 2023 in San Salvador	18	17
Americas Paralympic Games 2023 in Bogotá, Colombia	11	7
Pan American Games Santiago 2023 in Santiago, Chile	16	6

Source: Prepared by the authors with information from the Institute of Sports and Recreation of the State of Querétaro, 2024.

- ▶ **CONADE 2023 National Games:** 230 medals were obtained, 7th place for total medals and 9th for gold medals.
- ▶ **CONADE 2023 Paranaional Games:** 142 medals were obtained, 5th place nationally.

### Main achievements by INDERQ, 2023

- ▶ The promotion of sports practice increased through the Querétaro Marathon 2023, with the participation of over 17,800 people, representing a 20% increase compared to the previous year.
- ▶ Work continued on sports academies, with 70 soccer academies, 20 basketball academies, 59 sports initiation academies, and 20 flag football academies, providing sports equipment, uniforms, events, and tournaments to over 12,000 people.
- ▶ The "Actívate Aquí" Program had 7,023 users, of which 85% were women and 15% were men, providing 220,430 services through the 20 modules located in 13 municipalities of the State of Querétaro.
- ▶ Through the "Contigo en la Escuela" Program, sports facilities were rehabilitated, and sports equipment was delivered to 4 schools, benefiting 744 students.



## 3.2.4

**Youth**

The Ministry of Youth (SEJUVE, by its Spanish acronym) is the agency in charge of planning, formulating, implementing, coordinating and evaluating cross-cutting public policies aimed at the harmonious development of youth, within a framework of inclusion and equity of social, economic and cultural opportunities.

In accordance with the provisions of the Law for the Development of Youth in the State of Querétaro, the target population is considered to be the adolescent and youth sector in the age range of 12 to 29 years old in the State of Querétaro.

During fiscal year 2023, in order to integrate various programs and actions to contribute to the integral development of the state's youth, SEJUVE carried out two programs called "Ser tranquilidad, ser SEJUVE" and "Contigo rumbo joven", which aim to benefit up to 7,000 and 17,000 young people, respectively.







### “Ser tranquilidad, ser SEJUVE” Program

It consisted of providing psychological care to the state’s youth through the hiring of health professionals and scholarship holders, who provided their services through the following support modality:

#### Psychological counseling and emotional support

- ▶ **Psychological first aid:** through this initiative, emergency psychological care was provided.
- ▶ **Psychotherapy:** psychological counseling, both face-to-face and virtual, was provided to cases derived from the Program’s psychological first aid services, as well as referrals through official channels from other institutions.
- ▶ **Therapeutic group:** with the purpose of accompanying people within the Program, support networks were created to develop social skills and skills for the expression of emotions.

#### Promotion of psychoemotional health

- ▶ **Psychoemotional health campaign:** created to promote recommendations and techniques to promote preventive skills and habits of expression and identification of emotions, to encourage decision-making based on information and knowledge in psychoemotional health, all through digital or printed materials, as well as activations performed by the team of brigade members.

#### Development of psychoemotional skills

6,868

PSYCHOLOGICAL COUNSELING AND EMOTIONAL SUPPORT

171

PROMOTION BRIGADES OF PSYCHOEMOTIONAL HEALTH

19,819

DEVELOPMENT OF PSYCHOEMOTIONAL SKILLS

- ▶ **Learning in socioemotional health:** the main objective was to train, through brigades, young people from the work centers in psychoemotional and social skills, through workshops, conferences, classroom-by-classroom talks and other training resources, based on values such as gender equity and equality, and the youth perspective.



### “Contigo rumbo joven” Program

Youth economic development subprogramme

30

ENTREPRENEURS WITH FINANCIAL SUPPORT GRANTED

379

PARTICIPANTS IN THE ENTREPRENEURSHIP COMPONENT

60

WINNER ENTREPRENEURS

- ▶ "Emprendiendo CONTIGO" component: thanks to SEJUVE's trained personnel, young entrepreneurs were offered support and tools to contribute to and promote their professional and economic growth.

“Reconstrucción de tejido social” subprogramme

1,308

YOUNG PEOPLE WHO MADE USE OF THE FACILITIES “CASA SEJUVE”

15

SPORTS FACILITIES REHABILITATED

- ▶ “Casa SEJUVE” component: through its facilities, we provided emotional health care, psychoemotional health and educational development for young people.
- ▶ “Rehabilitación de Espacios Deportivos” component: by rehabilitating sports facilities, we sought to promote sports, culture and citizen participation.

“Fortalecimiento de la formación educativa de las juventudes” subprogramme

- ▶ “Revista de Divulgación Científica” component: scientific thinking was encouraged and brought closer to young people through the creation of a physical and digital space where young people shared the knowledge they have built to generate greater global competitiveness based on it, 21 articles and 2 journals were published for this purpose.



“Apoyo para el fomento y desarrollo de la participación social en jóvenes del estado de Querétaro” subprogramme.

150

AMBASSADORS

300

VOLUNTEERS

- ▶ “Ambassadors” component: fostered the social participation of young people, integrating a leadership network through activities, workshops, conferences, roundtables and excursions on the themes of social action, integration, sports and culture, and business training, with the aim of empowering young people and turning them into agents of change in their communities, neighborhoods and municipalities.
- ▶ “Volunteering” component: social participation was encouraged through a “volunteering program” that promoted social action, participation, social responsibility and sustainable development in the state.





3.2.5

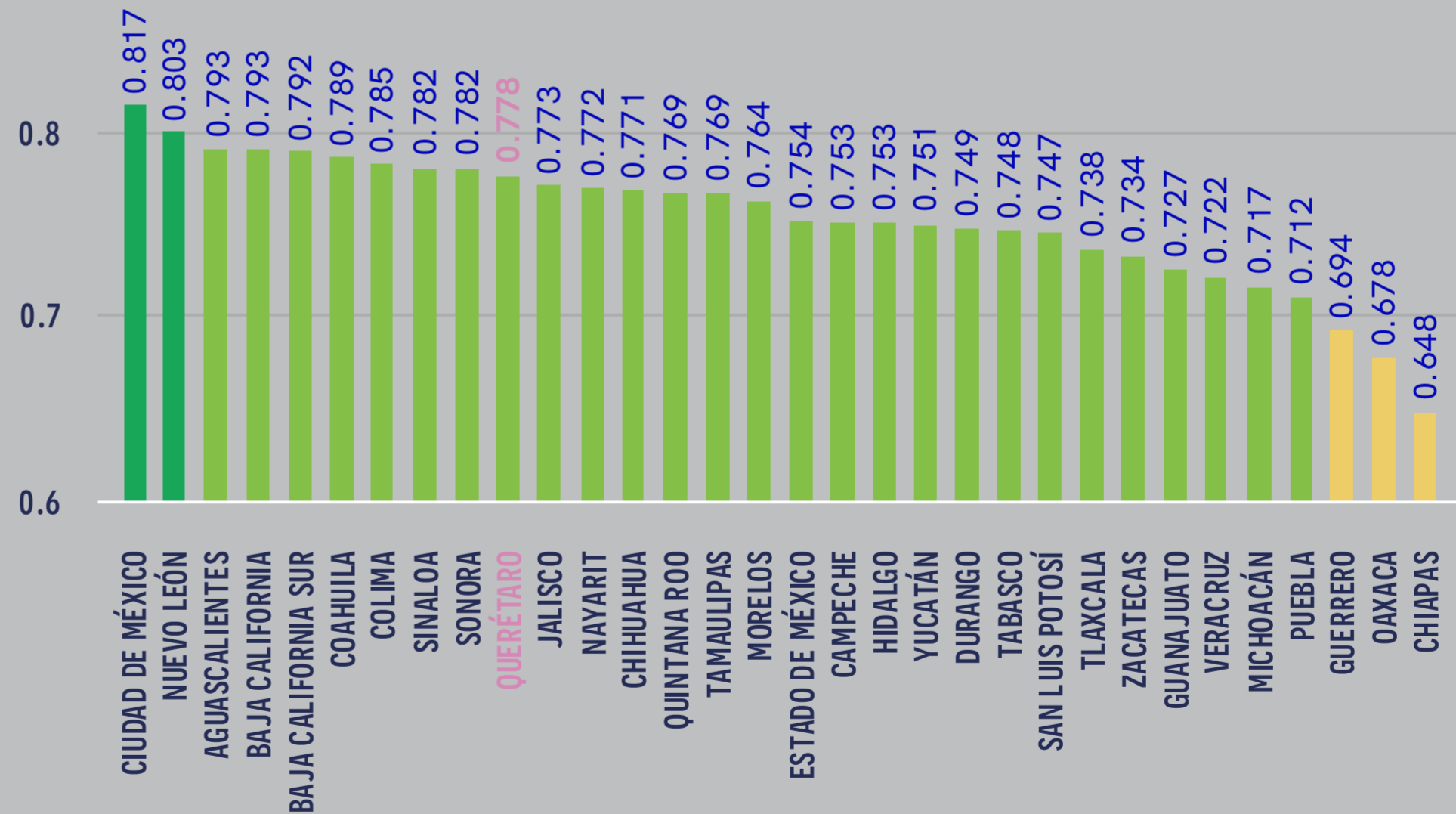
### Human Development Index (HDI)

Through the United Nations Development Program, the HDI is postulated, with the purpose of reorienting public debate towards the construction of an environment that guarantees human rights and meets the needs of the population, for which three dimensions are considered: 1) health, as measured by life expectancy at birth; 2) education, as measured by expected years of schooling and average years of schooling; and 3) income, measured by per capita income.

According to the Municipal Human Development Report 2010-2020, Querétaro ranked 10th in terms of average HDI per municipality, with a value of 0.778, reflecting a high level within the same.

### Municipal Human Development Index average by state (2020)

Very high level    High level    Intermediate level

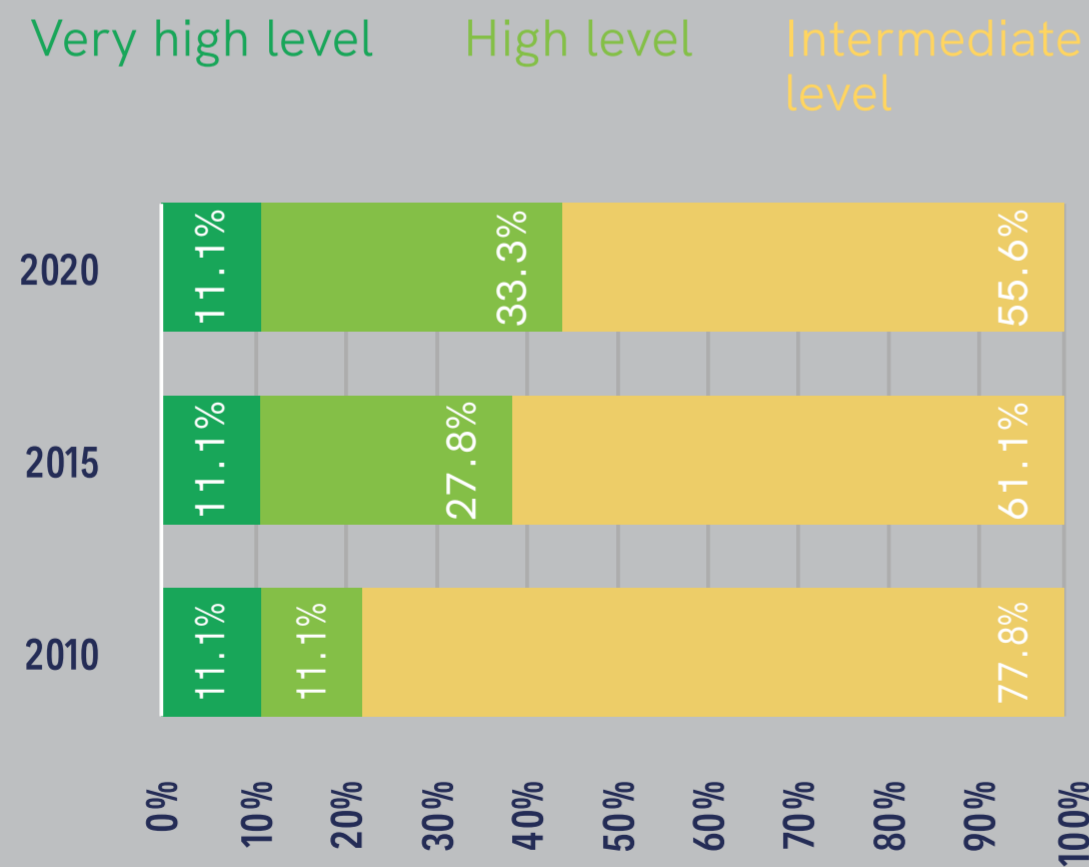


Source: Prepared by the authors with data from the United Nations Development Program (Municipal Human Development Report 2010-2020), 2024.



From 2010 to 2020, the state decreased the number of municipalities with a medium HDI level by 22.2 percentage points. In other words, 4 municipalities (El Marqués, Pedro Escobedo, Jalpan de Serra and Tolimán) now have a high HDI.

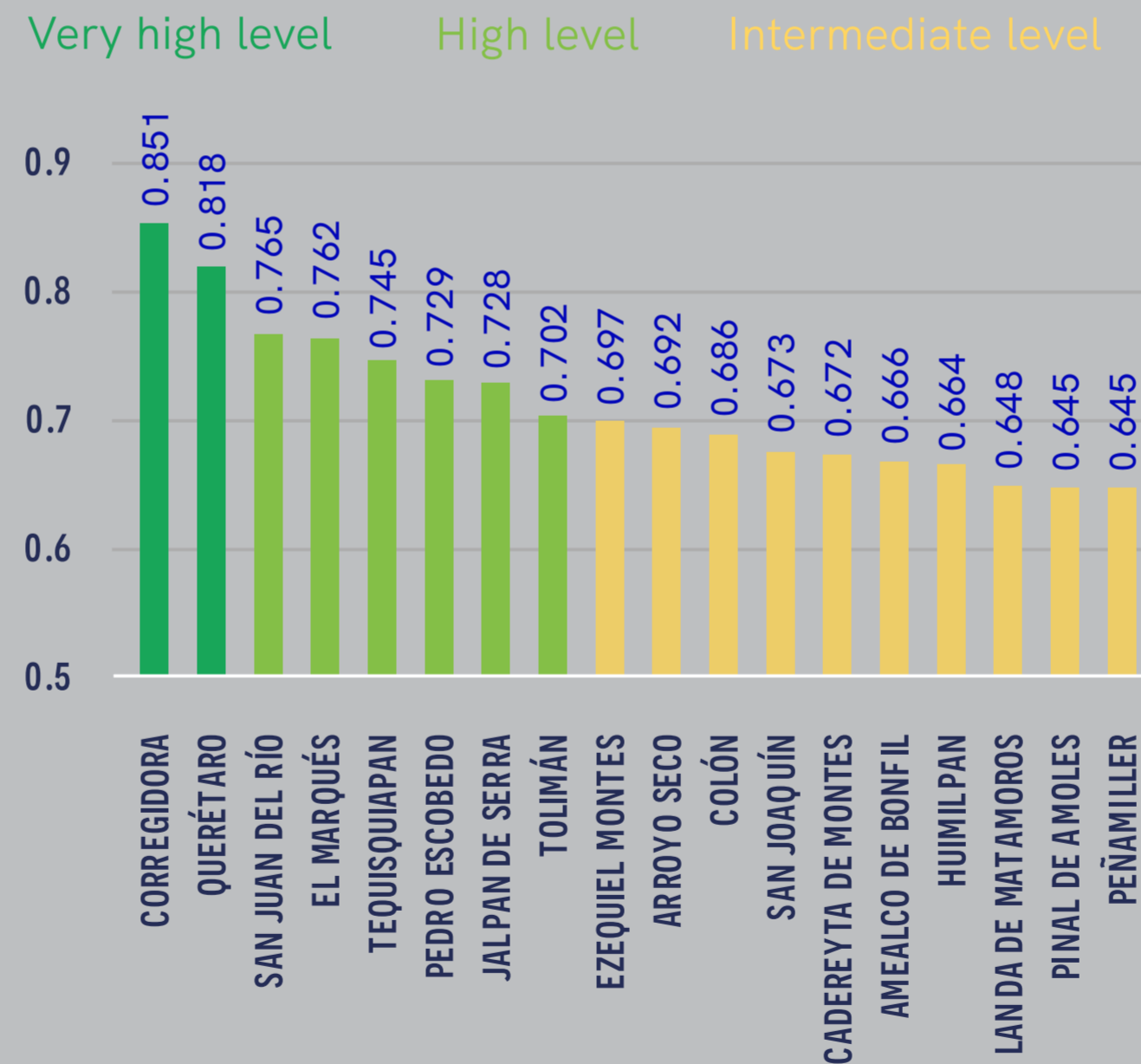
Distribution of municipalities according to their level of human development (2010-2020)



Source: Prepared by the authors with data from the United Nations Development Program (Municipal Human Development Report 2010-2020), 2024.

In 2020, with a value of 0.851, Corregidora was the municipality with the highest HDI in the state, a position it has maintained over time, reaching values in 2010 of 0.868 and in 2015 of 0.863. It is followed by Querétaro with a value of 0.818 for the most recent year, in 2010 it stood at 0.809 and in 2015 at 0.825.

Human Development Index by municipality in Querétaro (2020)



Source: Prepared by the authors with data from the United Nations Development Program (Municipal Human Development Report 2010-2020), 2024.





## 3.3

# Social development

## 3.3.1

## Security

In the current administration, one of the priority projects is to maintain the security of the state. To meet this objective, a historic investment of more than 4 billion pesos was made to improve the technology, equipment and development of new capabilities of the police force. In this way, the construction of the New Security Complex, which includes new buildings for the Ministry of Citizen Security and the State Police, was carried out in order to strengthen the security system at the state level.



Through the Ministry of Citizen Security, we work every day to maintain a safe state. For this reason, operations are implemented as part of a police strategy, with the purpose of safeguarding the integrity and rights of the people, as well as preserving public order and social peace.

According to the fifth edition of the Mexico Rule of Law Index 2022-2023 (IEDMX, by its Spanish acronym), prepared by the World Justice Project (WJP), Mexico has remained in first place in the Index for two consecutive years, ranking first in 4 of the 8 factors that comprise it: 1) Limits to governmental power; 2) Absence of corruption; 3) Fundamental rights; and 4) Criminal justice.

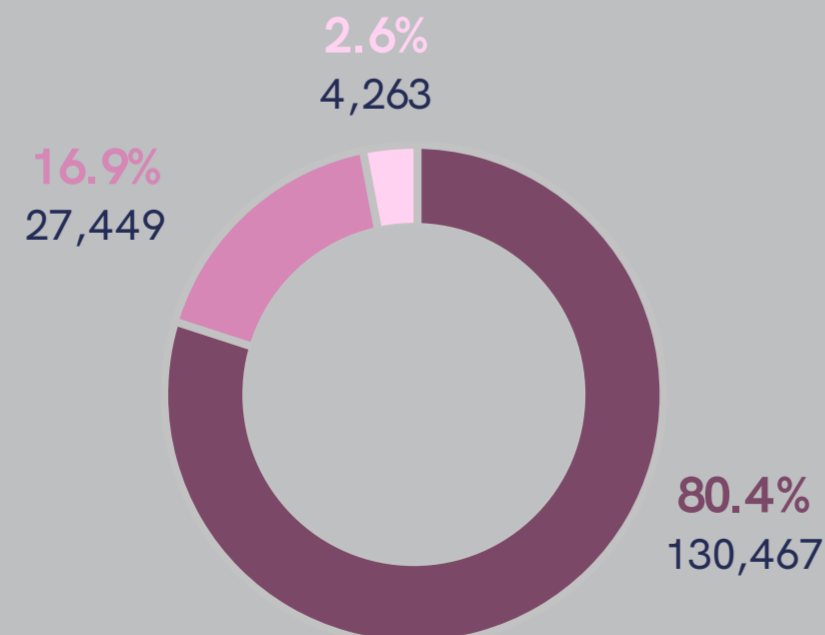


### Public services

Among the services provided by the Ministry of Citizen Security are the issuance of driver's licenses, permits to drive without license plates and certificates of no infraction. During 2023, a total of 162,179 documents were issued for the benefit of applicants.

#### Procedures issued by the Department of Public Services and Private Security of the Secretariat of Public Safety (2023)

- Licence
- Certificates of non-infringement
- Permits



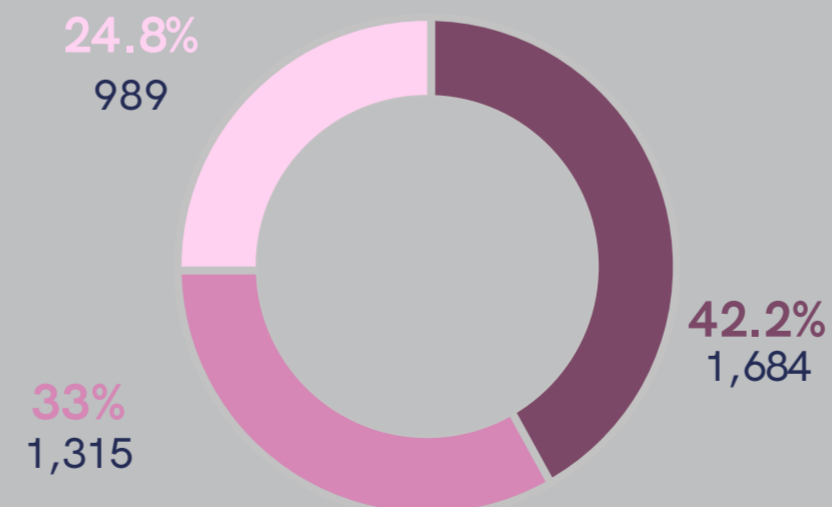
Source: Prepared by the authors with information from the Ministry of Citizen Security, 2024.

### Operatives and vehicle recovery

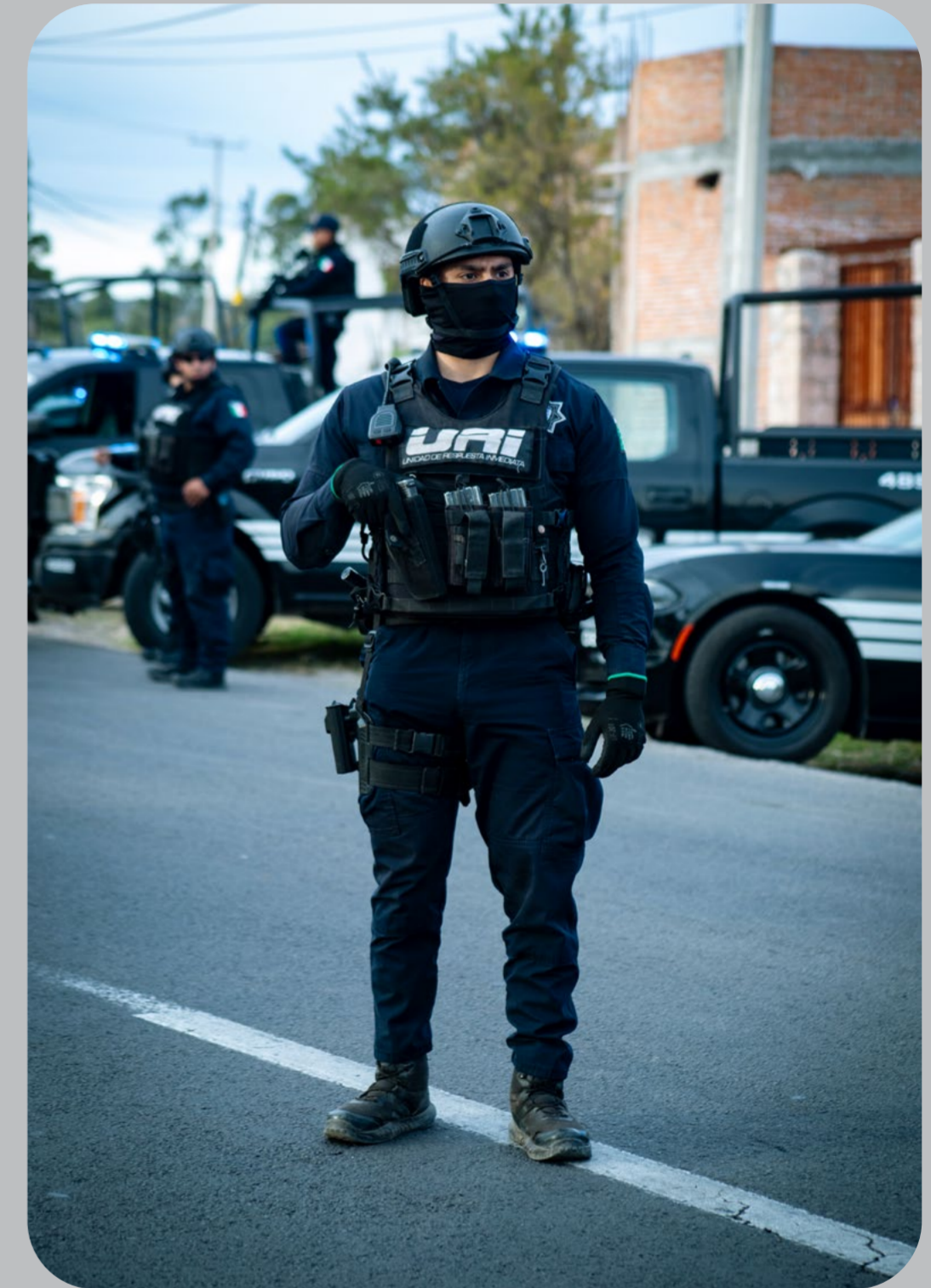
In the area of security and in order to prevent and reduce the incidence of violence, crime and administrative offenses, the State Police implemented 3,988 operations.

#### Operations carried out by the State Police (2023)

- Safeguarding state boundaries
- Road safety
- Prevention of property crime



Source: Prepared by the authors with information from the Ministry of Citizen Security, 2024.



In addition and addressing the facts that harm the people of Querétaro, 1,014 vehicles with a theft report were recovered, benefiting 22.6% of the affected citizens.



## Attention to guilds

For the Ministry of Citizen Security it is important to achieve links with society groups and guilds, which is why communication mechanisms were implemented to address, channel and respond to emergencies.

Currently, there are 100 instant messaging groups with different guilds and population groups in the state, for security, health and emergency services, through the channeling of requests to the corresponding authorities and timely police intervention.

The timely response to an emergency prevents the commission of a criminal act, encourages reporting, provides timely information on persons or vehicles related to the commission of such acts and creates a culture of reporting on cybersecurity so that, in the event of an event of this nature, it is channeled directly to the Cybernetic Police for follow-up.







## Prevention actions

Through the Center for the Social Prevention of Crime and Violence in the State of Querétaro and in order to follow up on the implementation of the State Program “Civics, Peace and Legality”, which aims to prevent crime and violence, during 2023, several actions were carried out, among which the following stand out:

- ▶ There were 21 programs aimed at: recovery of public spaces (10); social prevention actions (4); social responsibility activities (2); animal welfare (2); citizen participation (1); cultural activities (1); culture of peace activities (1).

## Everyday and civic justice

- ▶ The Proximity Police of Querétaro have carried out 548 settlement agreements with the Proximity Police, with a 95% effectiveness rate in the agreements fulfilled.
- ▶ Likewise, the Protocol for the Application of Community Work was issued as a guide to establish the steps to follow in order to promote measures to improve coexistence and contribute to the construction of safe communities.

## Alternative Dispute Resolution and Conflict Resolution Mechanisms

- ▶ With respect to criminal matters in which mediation, conciliation and restorative board sessions were held to reach agreements for the reparation of damages in favor of the victims of the crime, more than \$166,710,776.00 million pesos were recovered, and 15,171 people were assisted. In comparison with the year 2022, there was an increase of 80.7% in the reparation of damages in favor of crime victims.



## Children, adolescents and women

- ▶ Five thousand codes were delivered to use the app “Emergency button” to be used in case of a situation and there is no balance in the cell phone.
- ▶ A total of 16,034 identity cards were distributed as part of the Center’s participation in the Amber Alert Committee in Querétaro.
- ▶ The “Rights of Children and Adolescents” and “Civics, Culture, Peace and Legality” campaigns were implemented to raise awareness of various topics focused on peaceful coexistence.



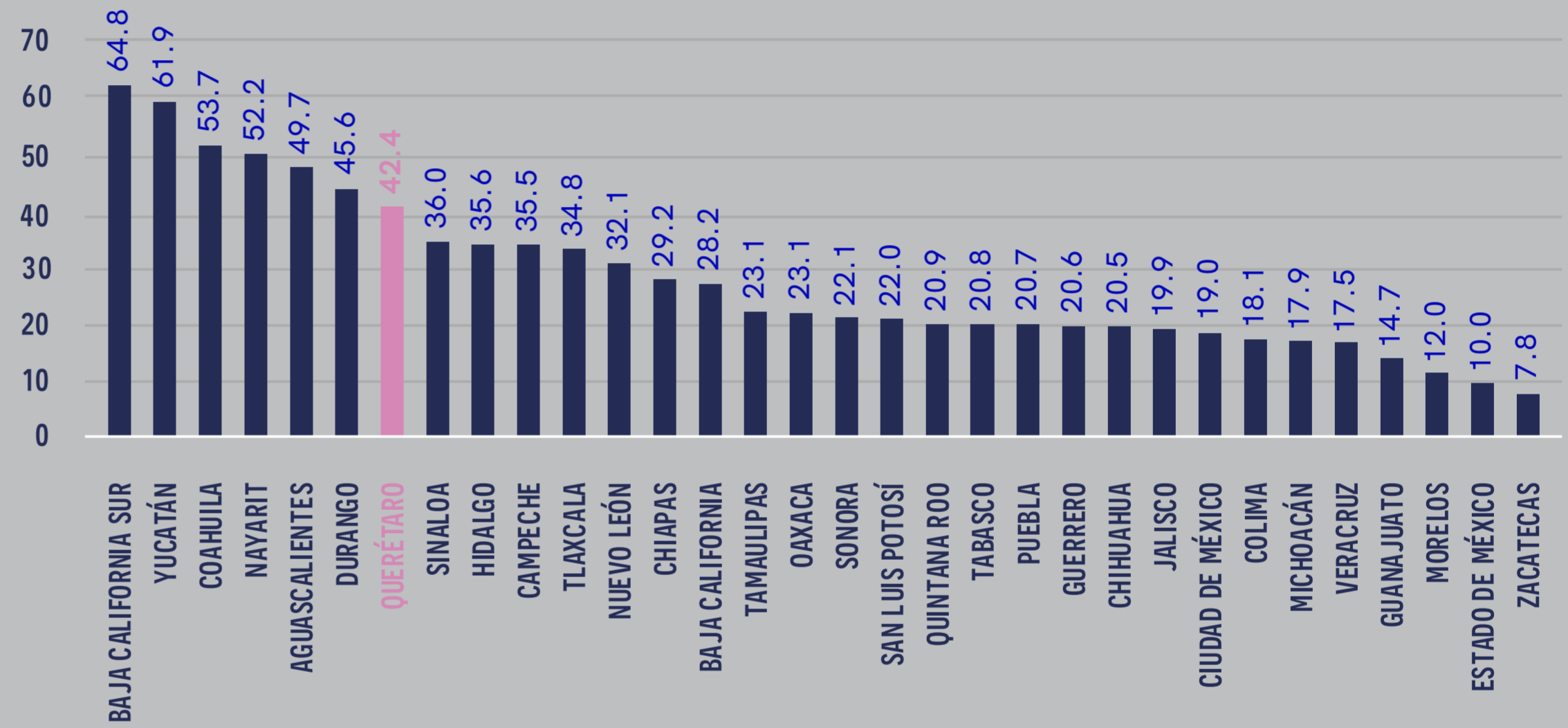
### National Survey on Victimization and Perception of Public Security (ENVIPE, by its Spanish acronym)

The ENVIPE aims to generate and present information on crime victimization, social perception of public security and the performance of municipal, state and federal authorities.

In 2023, the main results for Querétaro were:

- ▶ 65% of the population considered that the State Police are willing to help.
- ▶ 59.7% of the population trusted the State Police "a lot or somewhat". This perception increased by 5 percentage points with respect to 2022.
- ▶ 72.7% of the population identifies the State Police, ranking 11th out of the 32 states in the country, higher than the national average of 67%.

Percentage of population with perception of public safety by state (March-April 2023)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (ENVIPE), 2024.

### Perception of security

According to the ENVIPE, Querétaro has consolidated its position as one of the entities with the highest perception of security, as it has remained among the first places since 2020.

In 2023, 42.4% of the population aged 18 and over considered that living in Querétaro was safe, compared to 2022, the state advanced by 0.7 percentage points.

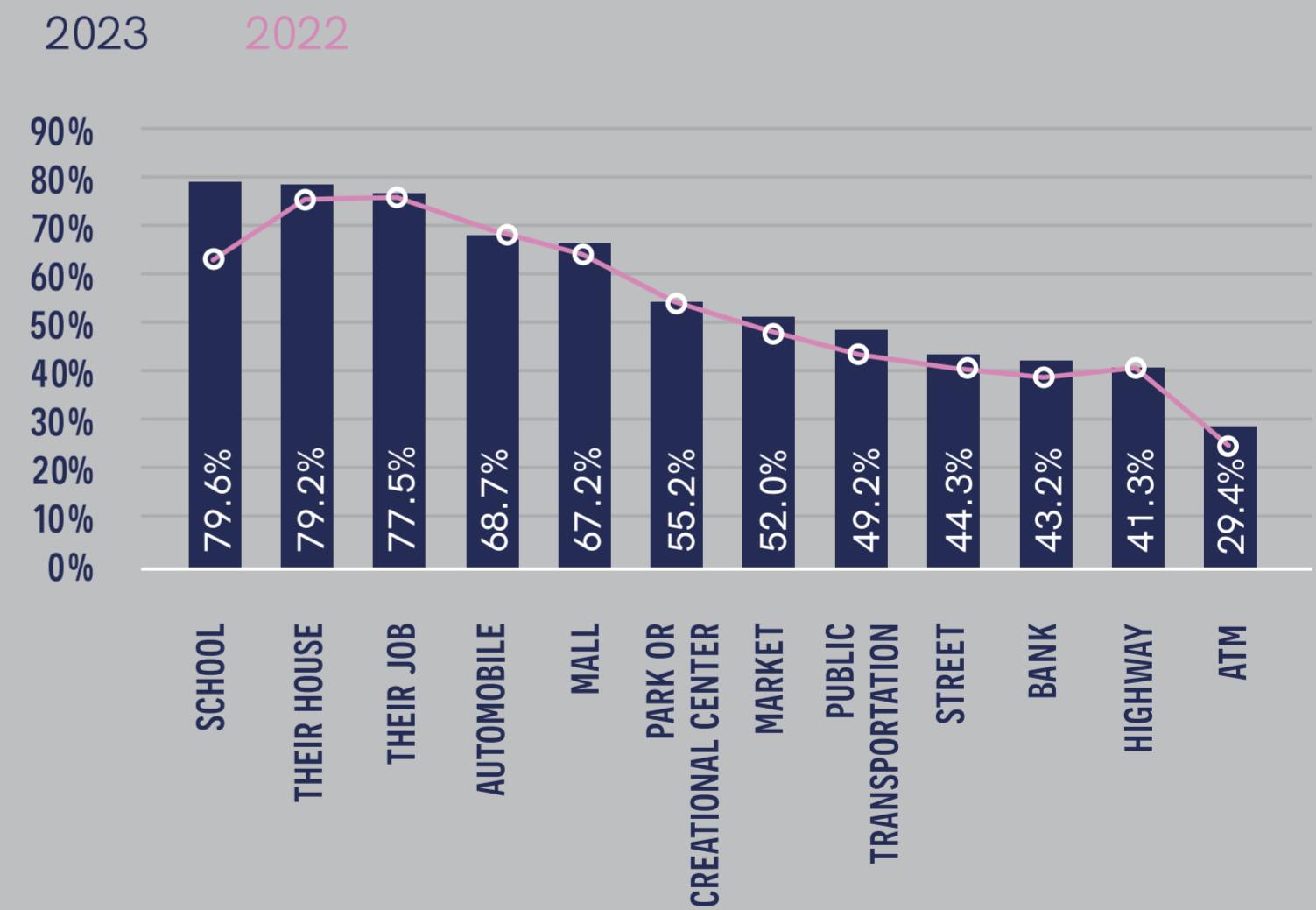


### Public security sensation in public spaces

During 2023, the population aged 18 and over in Querétaro, registered an increase in the feeling of public security in 10 of the 12 spaces reported with

respect to 2022, with school being the space with the highest increase, going from 63.7% to 79.6%, an increase of 15.9 percentage points.

Population according to their perception of security by area in Querétaro (March-April 2022-2023)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (ENVIPE, by its acronym in Spanish), 2024. Note: The figures in the graph refer to the values reported for 2023.



## Civil Protection

It is the set of provisions, measures and actions aimed at the prevention, relief and recovery of the population in the event of a disaster.

One of the most important challenges of the State Civil Protection Coordination is Disaster Risk Management. This consists of risk identification and the process of risk formation, forecasting, prevention, mitigation, preparedness, relief, recovery and reconstruction. All these actions are aimed at eliminating or mitigating risks for the population of Querétaro.

### Results of Civil Protection actions in Querétaro (2022-2023)

ACTIVITY	2022	2023	VAR. %
Trained persons	8,627	13,975	62%
Courses provided through the Civil Protection Training Center	197	299	51.8%
Training hours	1,718	2,425	41.2%
Trained community brigaders	4	27	575%
People impacted by brigade training	94,020	5,200	-94.5%
Campaigns to disseminate Civil Protection culture	92	83	-9.8%
Social networks impact: Facebook (followers)	419,841	685,615	63.3%
Social networks impact: Twitter (followers)	40,095	137,984	244.1%
Persons registered as external trainers in civil protection matters	122	118	-3.3%
Persons registered as consultants in civil protection matters	135	130	-3.7%
People registered as members of the IPSED (Psychosocial Intervention for Emergency and Disaster Situations, by its Spanish acronym) NETWORK	47	47	0.0%
Registered volunteer groups (adhered to the State Emergency Care System)	9 Firefighter groups 26 Prehospital medical care groups 9 Mutual aid groups	10 Firefighter groups 23 Prehospital medical care groups 50 Mutual aid groups 2 Rescue groups	-
Risk Analysis	304	185	-39.1%
Determination of the occupational level in places of massive concentration (capacity)	244	277	13.5%
Risk Atlas points surveyed	27,234	39,429	44.8%
Emergencies attended	1,955	2,210	13.0%
Radio control services attended and channeled	28,780	48,278	67.7%
Special operations attended	462	207	-55.2%
Inspections performed	11	179	1527.3%
Massive events attended	400	393	-1.8%

Source: Preparation by the State Coordination of Civil Protection of the State of Querétaro, 2024.



3.3.2

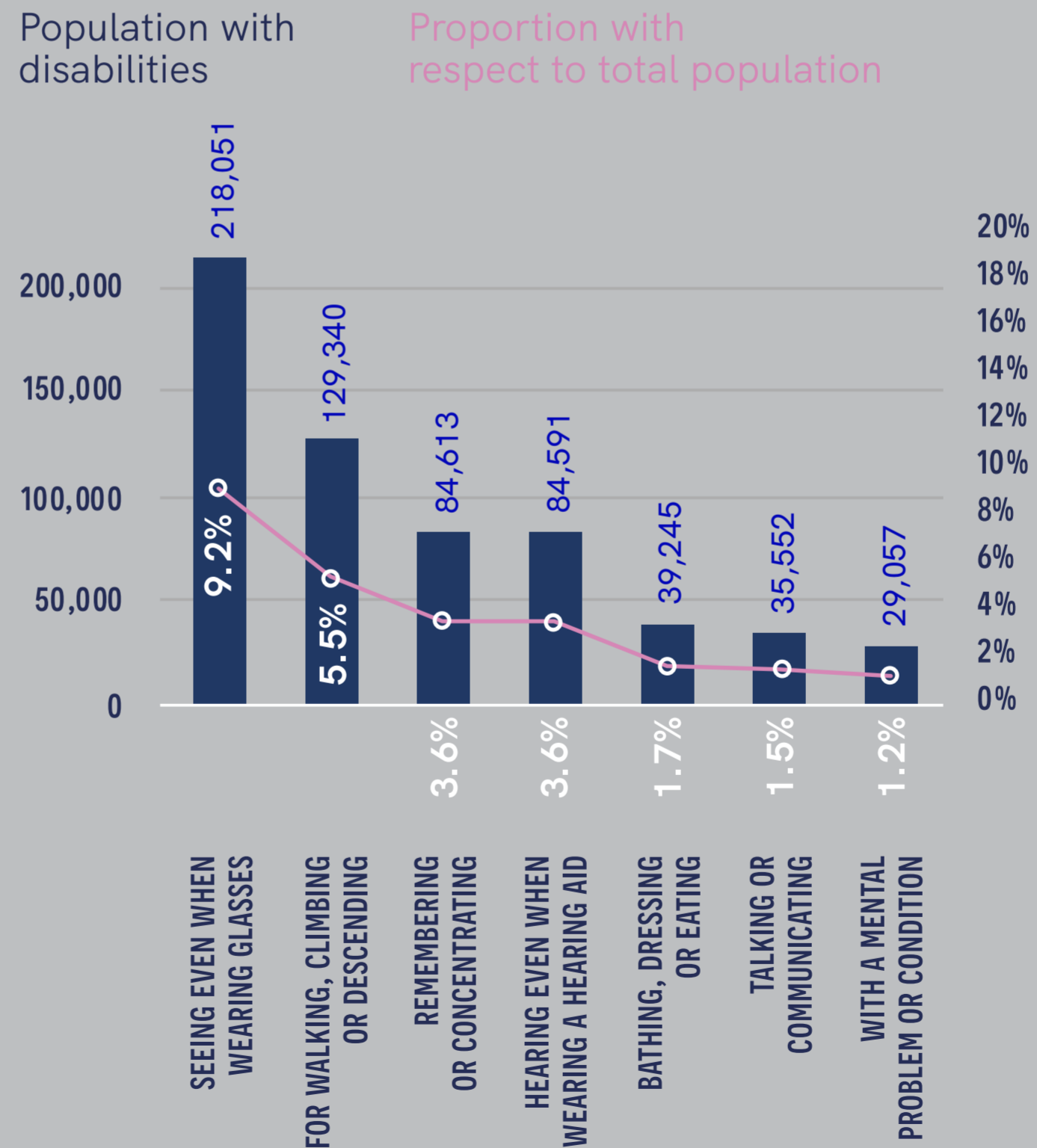
### Accessibility

According to the General Law for the Inclusion of Persons with Disabilities, published in the Official Gazette of the Federation on May 30, 2011, it is defined as measures to ensure access to persons with disabilities, on equal terms with others, in areas such as transportation, information and communities.

### Population with disability, limitation or mental condition

The information presented in the 2020 Population and Housing Census establishes that, in Querétaro, 355,047 people reported having some type of disability, limitation or mental condition.

Population by type of disability or limitation in Querétaro (2020)



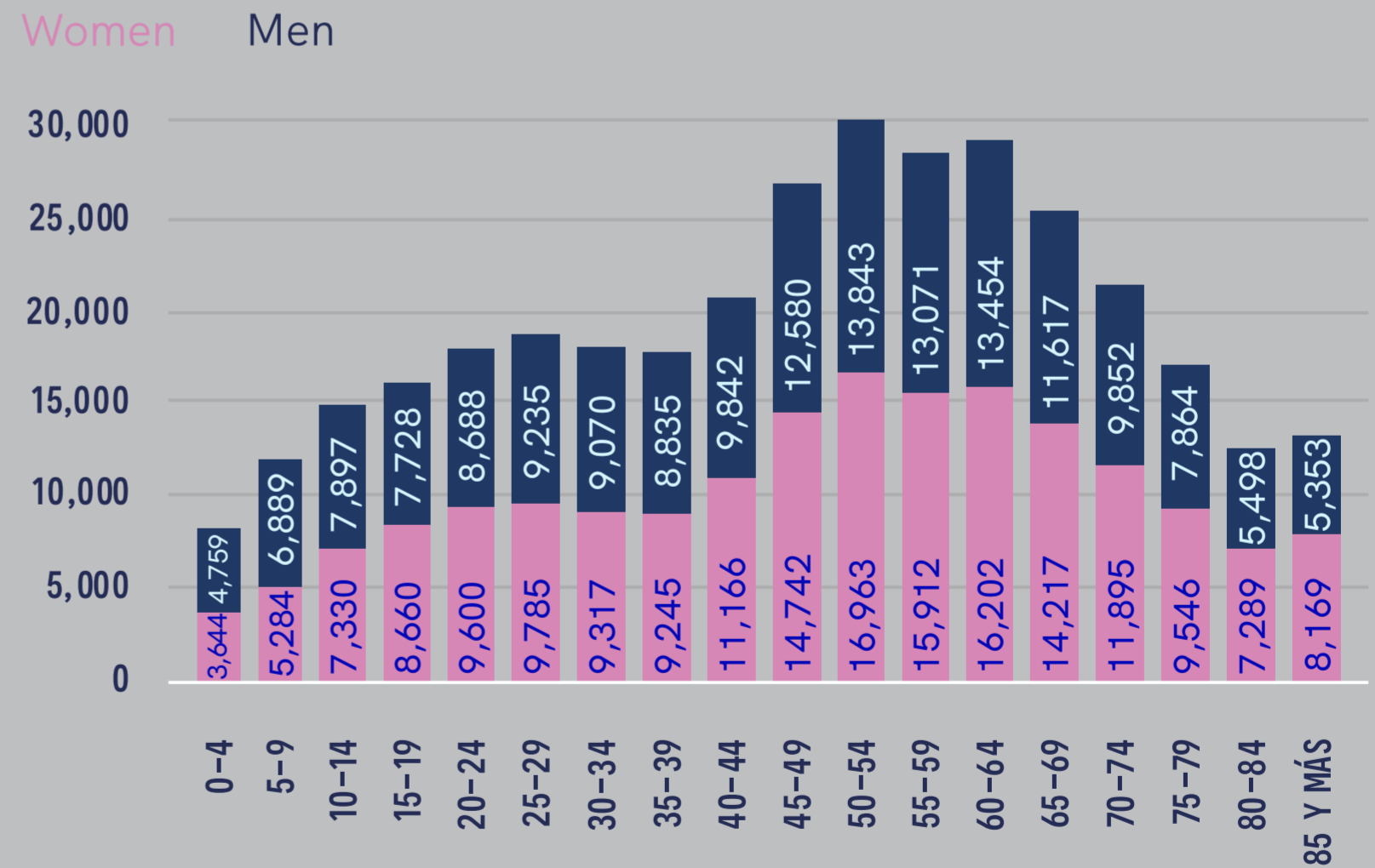
Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Population and Housing Census 2020), 2024. Note: The sum of each category exceeds the total number of persons with a disability or limitation because some persons register more than one disability or limitation.



Of the total, 53.2% are women and 46.8% men. Nationally, 20,838,108 have some disability or limitation, 1.7% of which are located in Querétaro.

By age group, in Querétaro during 2020 the highest concentration of people with disabilities or limitations was in the 50 to 54 age group with 30,806 (8.7%), followed by the 60 to 64 age group with 29,656 (8.4%) and 55 to 59 age group with 28,983 (8.2%).

Population with disabilities by sex and age group in Querétaro (2020)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Population and Housing Census 2020), 2024. Note: The age groups are indicated in years.



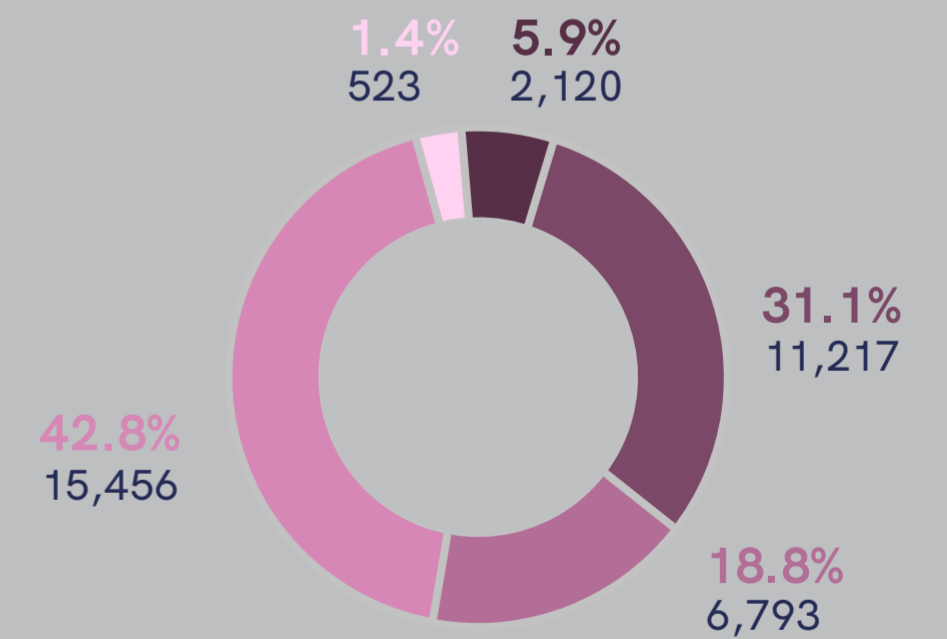
### Education for people with disabilities

During the 2023-2024 school year, a total of 36,109 students with disabilities were served through the different educational levels. With respect to the 2022-2023 school year, the number

of students enrolled in the different educational levels remained as follows: preschool -6.6%; elementary school -3.3%; secondary school 5.3%; high school 11.7%; and senior high school -24.1%.

Distribution of students with disabilities by educational level in Querétaro (School year 2022-2023)

Preschool	Elementary	Secondary
High school	Higher	



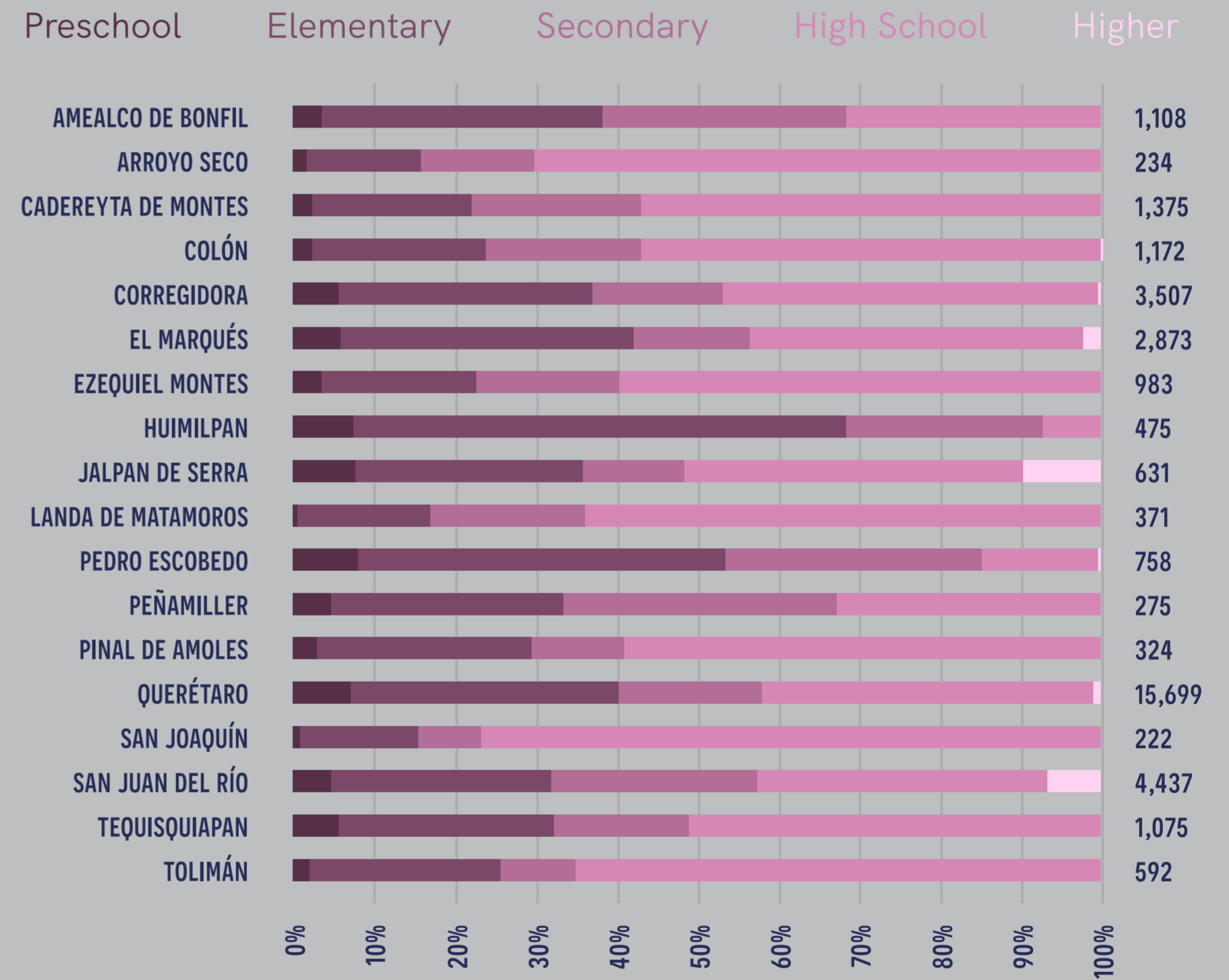
Source: Prepared by the authors with data from the Unit of Services for Basic Education in the State (Directorate of Educational Planning), 2024.

Note: Students with disabilities, disorders, other conditions and outstanding abilities are included.



Within the 18 municipalities of the state, 42.8% (15,456) of the students with disabilities were concentrated in high school; 31.1% (11,217) in elementary school; 18.8% (6,793) in secondary school; 5.9% (2,120) in pre-school; and 1.4% (523) in senior high school.

Distribution of students with disabilities by educational level by municipality (School year 2022-2023)



Source: Prepared by the authors with data from the Unit of Services for Basic Education in the State (Directorate of Educational Planning), 2024. Note: Students with disabilities, disorders, other conditions and outstanding abilities are included.





### Accessibility in the education sector

During the 2022-2023 school year, 70 special education services were reported, of which 24 are Multiple Attention Centers (CAM, by its Spanish acronym) and 46 Regular Education Support Service Units (USAER, by its Spanish acronym).

### Special education schools in the different municipalities school year (2023-2024)

MUNICIPALITY	CAM	USAER
Amealco de Bonfil	1	1
Cadereyta de Montes	1	1
Colón	1	1
Corregidora	2	-
Ezequiel Montes	1	1
Jalpan de Serra	1	4
Pedro Escobedo	1	1
Peñamiller	-	1
Querétaro	13	29
San Juan del Río	2	6
Tequisquiapan	1	-
Tolimán	-	1
<b>Total</b>	<b>24</b>	<b>46</b>

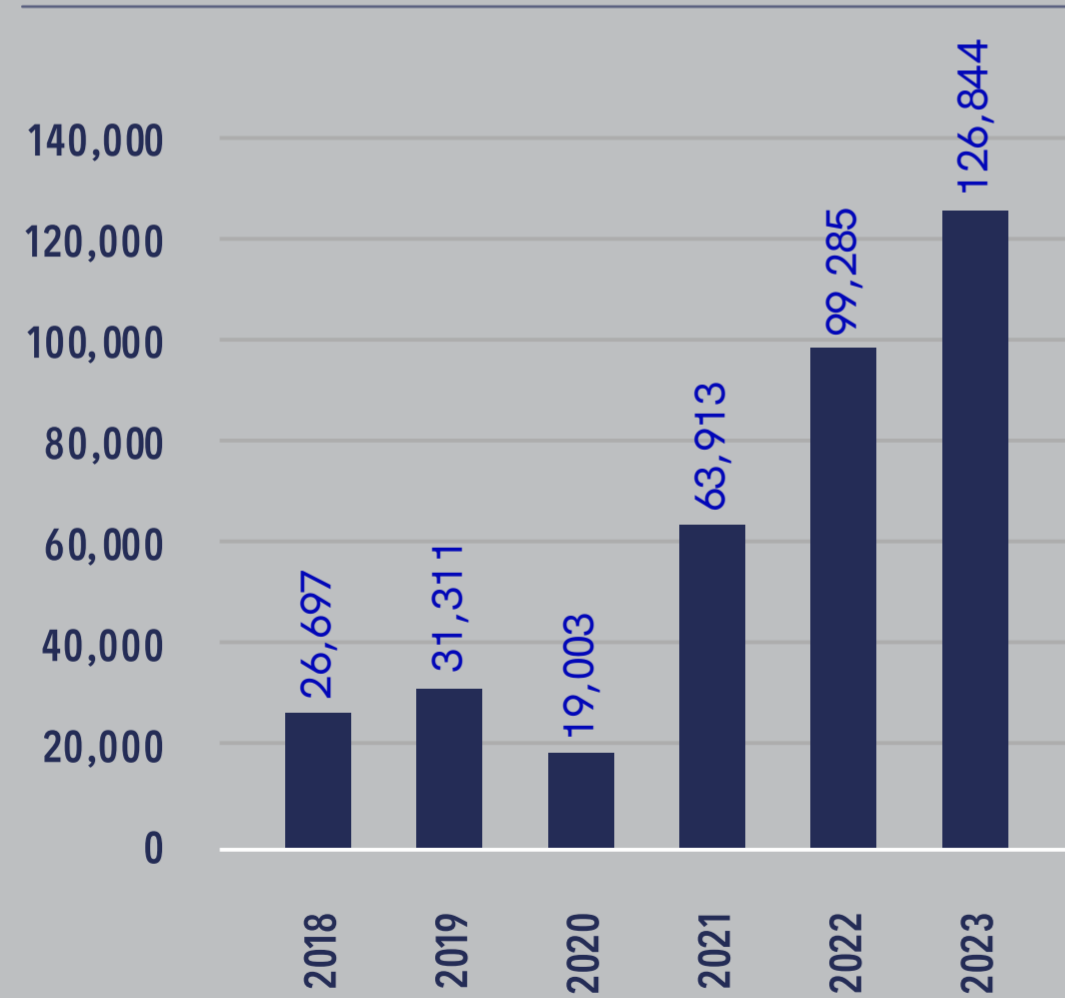
Source: Prepared by the authors with data from the Unit of Services for Basic Education in the State (Directorate of Educational Planning), 2024.

Note: The municipalities of Arroyo Seco, El Marqués, Huimilpan, Landa de Matamoros, Pinal de Amoles and San Joaquín do not have any special education services located in their territory.

## Attention to vulnerable people

In 2023, the State System for the Integral Development of the Family of the State of Querétaro (SEDIF, by its Spanish acronym) served 126,844 people with disabilities, a figure that maintains an increase of 27.8% over 2022.

### People with disabilities served through SEDIF Querétaro (2018 - 2023)



Source: Prepared by the authors with information from the State System for the Integral Development of the Family of the State in Querétaro, 2024.

In order to improve the welfare of Querétaro’s families and contribute to reduce vulnerability conditions, in 2023 DIF Querétaro carried out several programs and actions in the areas of transportation, health, food, among others. The most important achievements during 2023 are:

- ▶ Follow-up of the “Food supplies for persons subject to social assistance who are in a state of extreme vulnerability program”, benefiting 5,669 people with the delivery of 16,820 food supplies.
- ▶ “Cabalgando Juntos”, Metropolitan Area (integral equine therapy service)”, benefiting 551 people with 8,259 services.
- ▶ Creation of “Cabalgando Juntos”, Semi-desert Zone of the State of Querétaro (integral equine therapy service)”, benefiting 234 people with 3,380 services, during 2023.



- ▶ Creation of the program: “Social Assistance Days for the Preventive Health of Vulnerable Groups”, which consists of providing general preventive medical consultation services at home, as well as Health Days in which functional support, medicines, and screenings, among others, are delivered in communities of low, medium, high and very high marginalization in the State of Querétaro.



## Specialized transportation

DIF Querétaro has 11 buses (lines) that transport people with disabilities and senior citizens and 3 vans that facilitate the transportation of equine therapy patients. During 2023, 172,662 trips were made, benefiting 38,369 people.

## Office of the Attorney General for the Integral Care and Protection of the Senior Citizens

On March 10, 2022, a specialized area for the integral protection of senior citizens was installed, and the following activities were carried out during 2023:

- ▶ **Social Work Department:** received 560 reports of abuse, conducted 491 social work visits.
- ▶ **Psychology Department:** provided 2,085 services.
- ▶ **Legal Department:** carried out 2,132 interventions in lawsuits or investigation files.



- ▶ **Medical Department:** provided 5,836 geriatric and psychiatric care services.
- ▶ **Department of Nursing Homes:** made 477 visits to the nursing homes where the senior citizens placed at the disposal of this Office.
- ▶ **Coordination of the Metropolitan Gerontology Center “Plan Vida”:** benefited 1,225 people monthly through 32 workshops.
- ▶ **More Life:** the purpose is to generate a recreational space for the senior citizens in communities of high and very high marginalization. From May to December 2023, more than 12,000 people in 93 communities were benefited.

To strengthen the system for protecting the elderly, the “Consuelo Martínez De Gómez” Regional Human Development Center for the Elderly was inaugurated to provide comprehensive care for senior citizens of the central and semi-desert region, with classes and workshops to promote their human development, as well as medical, dental, legal and psychological care to promote dignified and full aging.

Through the Center, from October to December 2023, 3,550 services were provided and 14 workshops and comprehensive services were carried out, benefiting 1,593 people.



### Community development

- ▶ **Women’s House Coordination:** In 2023, 1,337 users were assisted through 47 productive training workshops and 36 human development workshops. The reported figure shows an increase of 86 women served, compared to 2022.

Among the most important achievements in this area of attention is the opening of more than 15 workshops, both for productive training and human development. The organization of 24 talks with 202 women in attendance. In addition, a total of 597 psychological counseling services and 253 legal counseling services were provided.

- ▶ **Coordination of Mobile Health Services.** 182 jordanas were held, benefiting 30,808 people.



- ▶ **Coordination of Community Participation.** In 2023, 469 members of 24 development groups were assisted through 22 training activities and the delivery of inputs for 12 community investment strategy projects.
- ▶ DIF Querétaro provided 38,622 medical and paramedical consultations at the Integral Rehabilitation Center in Querétaro (CRIQ, by its Spanish acronym), while at the Regional

Integral Rehabilitation Center in Cadereyta (CIRR, by its Spanish acronym), it provided 3,091 consultations throughout 2023.

- ▶ In terms of rehabilitation therapies, the Integral Rehabilitation Center in Querétaro (CRIQ, by its acronym in Spanish) provided 243,309, while the Regional Integral Rehabilitation Center in Cadereyta (CIRR) provided 8,219.



### Office of the Attorney General for the Protection of Children and Adolescents of the State of Querétaro

The Office of the Attorney General specializes in the protection and restitution of the rights of children and adolescents, through the detection of violated rights, comprehensive monitoring, legal representation, among other actions.

#### Actions carried out through the Office of the Attorney General (2022-2023)

CATEGORY	2022	2023
Reports of child abuse	1,010	1,202
Intervening representations in family legal proceedings	375	4,918
Intervening representations in criminal proceedings	521	655
Representations in amparo trials	1,499	1,522
Children and adolescents reintegrated into their families	314	392
Lawsuits initiated for loss of parental rights	12	23
Procedures for the restitution of the rights of children and adolescents.	316	248
Adoption processes	22	23

Source: Prepared by the authors with information from the State System for the Integral Development of the Family of the State in Querétaro, 2024.



## Nutrition

In 2023, children, adolescents, pregnant women, nursing mothers, people with disabilities, senior citizens and homeless people in the state's 18 municipalities received support through various programs:

- ▶ **School meals hot and cold school breakfasts.** A total of 92,172 school children and adolescents with 18,280,680 breakfasts in 1,841 schools in 894 localities in the 18 municipalities of the state were benefited.
- ▶ **Food care in the first 1,000 days.** A total of 3,084 children under 2 years of age, pregnant women and nursing mothers or in vulnerable situations were benefited with 36,702 food supplies in all districts of the state.
- ▶ **Food assistance to priority groups.** Assistance was provided to 6,246 children, adolescents, people with disabilities and senior citizens in vulnerable situations with 43,078 food rations and 509,200 meals in the 18 municipalities of the state.
- ▶ **Food assistance to people in emergency and disaster situations.** A total of 97,600 food rations in the municipality of Querétaro, benefiting 498 homeless and indigent children and adults were delivered.
- ▶ **Mobile Kitchen Program.** A total of 8,000 children, adolescents, adults and senior citizens in vulnerable situations with 155,200 rations in the 18 municipalities of the state were benefited.



## Child Care Assistance Centers 1 and 2

### Outcomes of Child Care Centers 1 and 2 (2021-2023)

YEAR	MEALS AND BREAKFASTS PROVIDED, IN ADDITION TO EDUCATIONAL SERVICES.	BENEFICIARIES BETWEEN 1 AND 5 YEARS OLD
2022	357	139,448
2023	144,476	363

Source: Prepared by the authors with data from the State System for the Integral Development of the Family of the State in Querétaro, 2024.



3.3.3

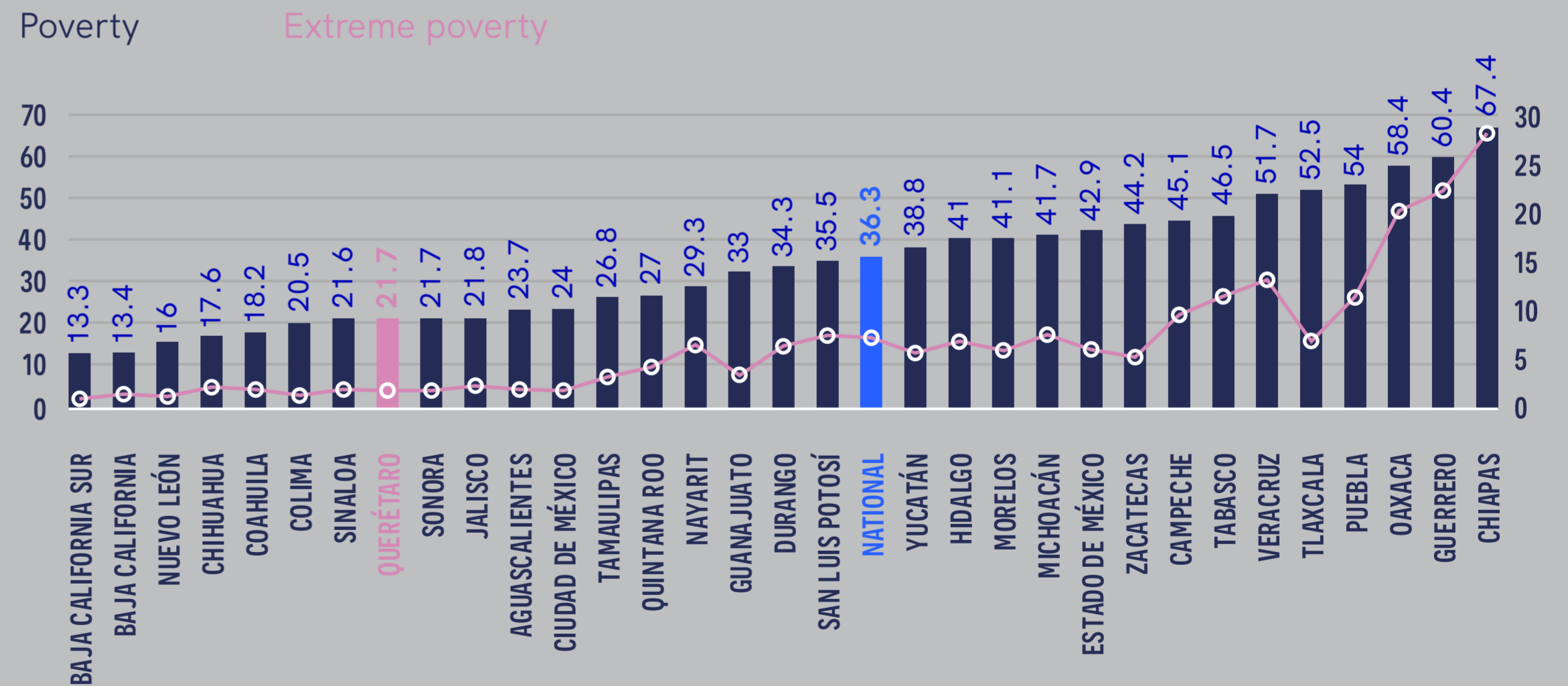
### Poverty and Inequality

The National Council for the Evaluation of Social Development Policy (CONEVAL, by its Spanish acronym) is the organization in charge of quantifying the different variables that determine poverty indexes in Mexico, in addition to evaluating the federal government’s social programs and policies.

In 2022, at the national level, the percentage of the population living in poverty decreased by 7.6 percentage points compared to 2020. That is, based on the latest results, 36.3% of the population is under this condition.

Querétaro ranked 8th among the states with the lowest level of poverty, moving up three places up compared to 2020. According to the 2022 figures, 21.7% of the population is in poverty, of which 1.7% is in extreme poverty. The values are lower by 9.6 and 1.2 percentage points, respectively, compared to those recorded for 2020.

Percentage of population living in poverty and extreme poverty, by state (2022)

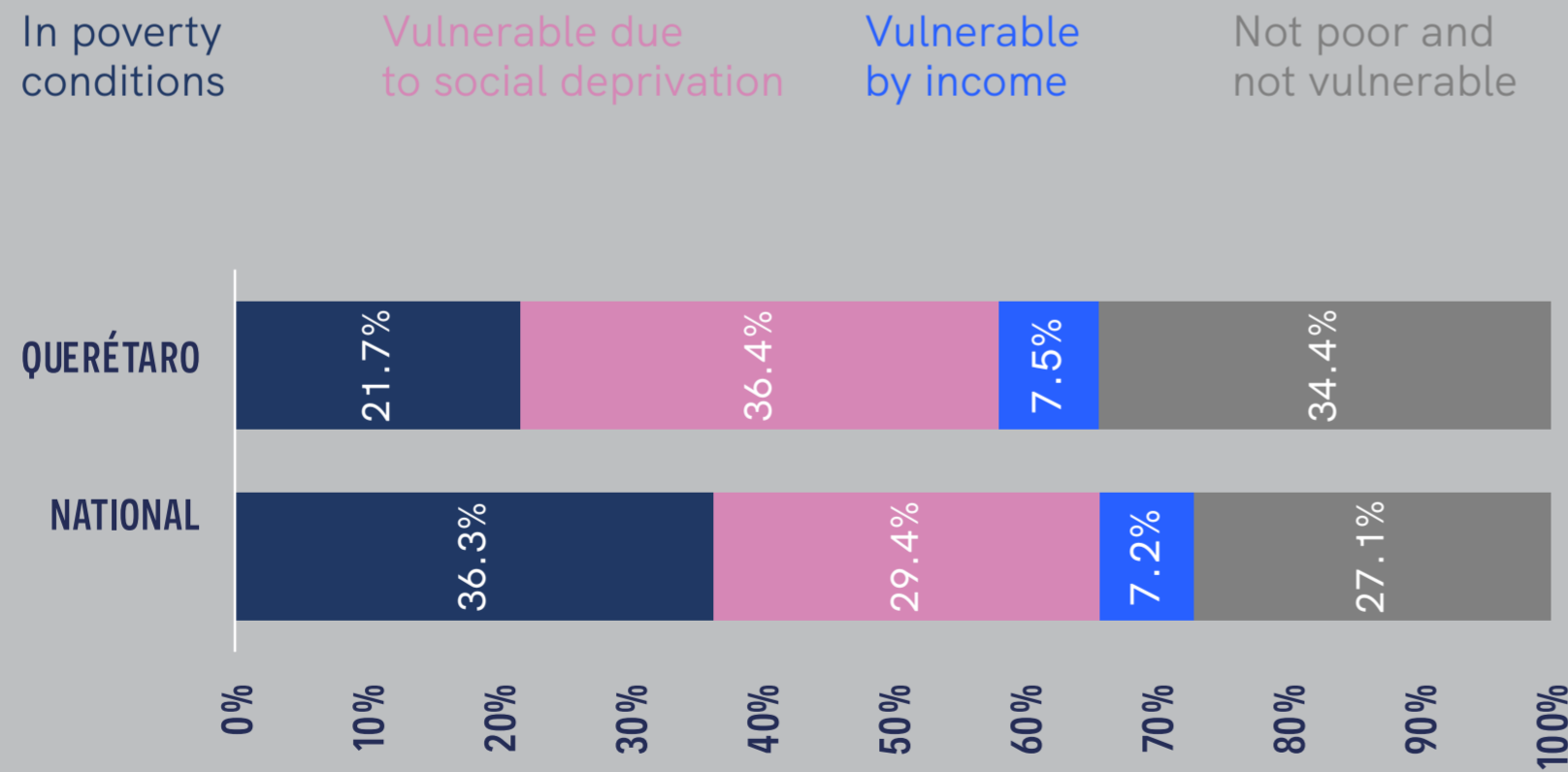


Source: Prepared by the authors with data from the National Council for the Evaluation of Social Development Policy (Poverty measurement), 2024. Note: Values are expressed as a percentage.



In addition to the population living in poverty, 36.4% of the population in Mexico is vulnerable due to social deprivation, while the national figure is 29.4%.

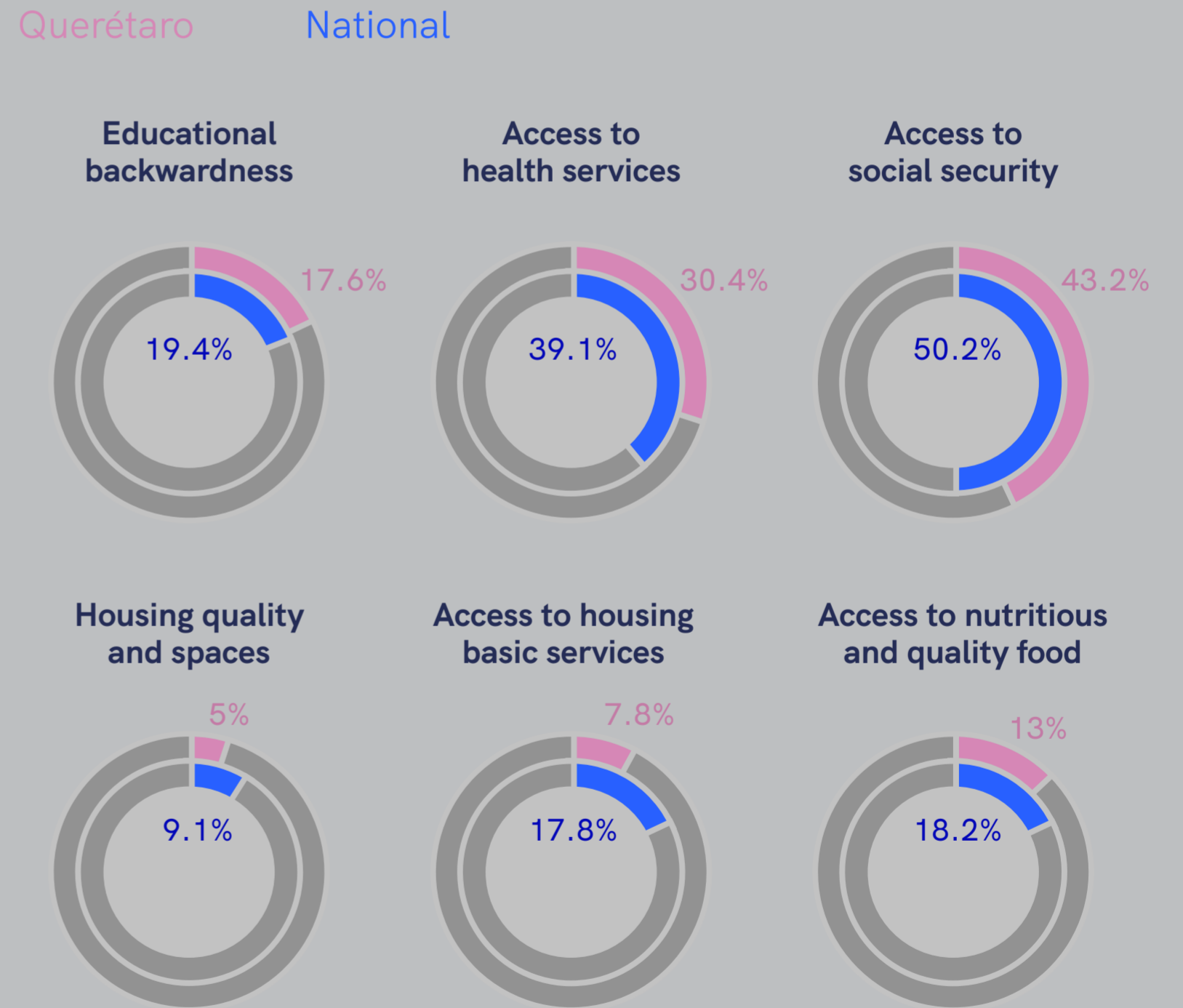
### Distribution of the population in poverty and non-poverty conditions in Querétaro and National (2022)



Source: Prepared by the authors with data from the National Council for the Evaluation of Social Development Policy (Poverty measurement), 2024.

Of the total population at the state level, 58.1% reported having at least one social deprivation and only 14.8% at least three deprivations. At the national level, the values are 65.7% and 24.9%, respectively.

### Proportion of population by social deprivation in Querétaro and National (2022)



Source: Prepared by the authors with data from the National Council for the Evaluation of Social Development Policy (Poverty measurement), 2024.



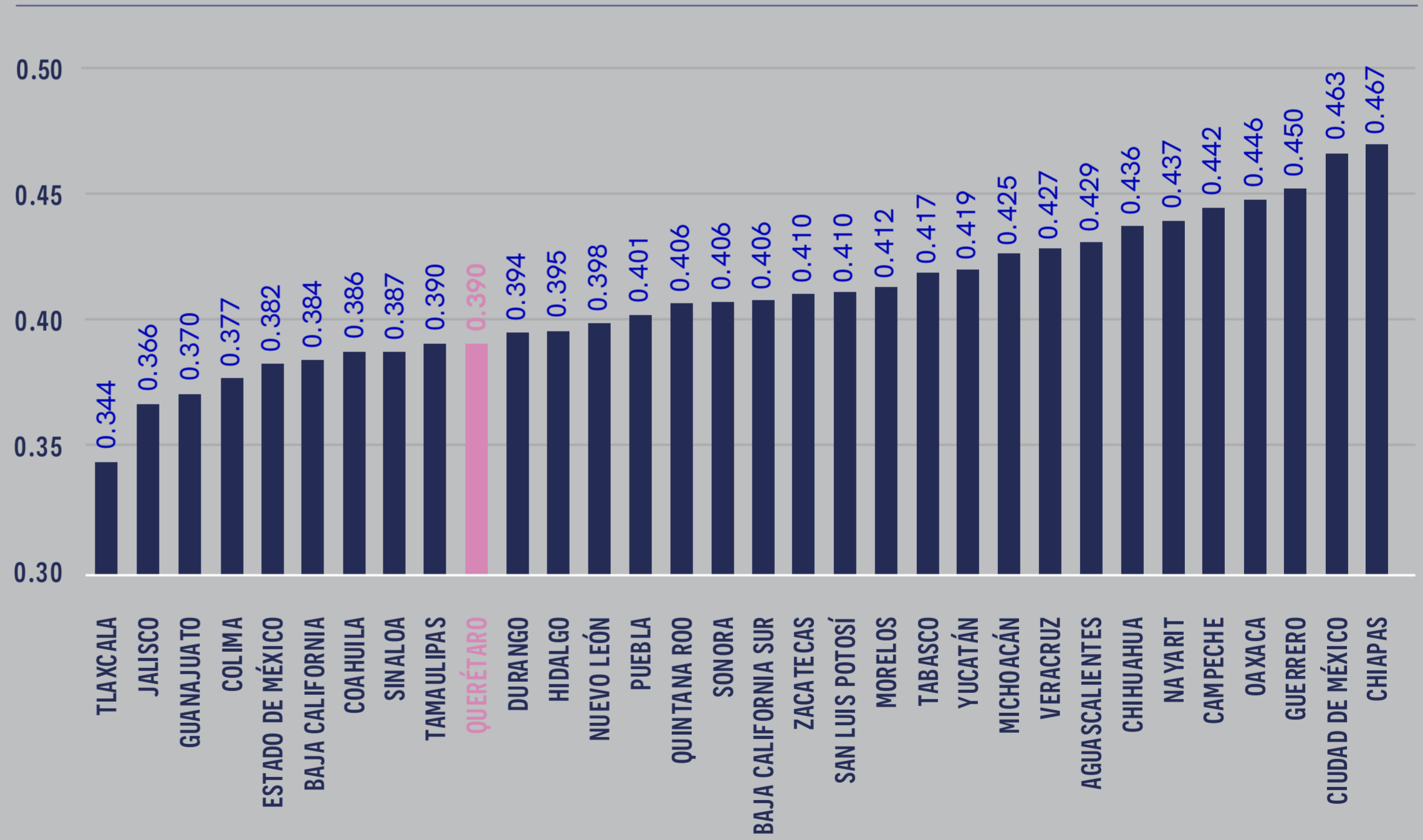


### Gini coefficient

It is an indicator that shows the degree of inequality in the distribution of income in different countries or states. The coefficient is measured between values of 0 and 1, the closer the value is to 1, the greater the inequality.

In 2022, Querétaro ranked as the 10th state with the lowest inequality, according to the Gini Coefficient, obtaining a value of 0.390. With this, the state advanced four positions compared to 2020; in the latter year, the state ranked 14th.

Gini coefficient by state (2020)

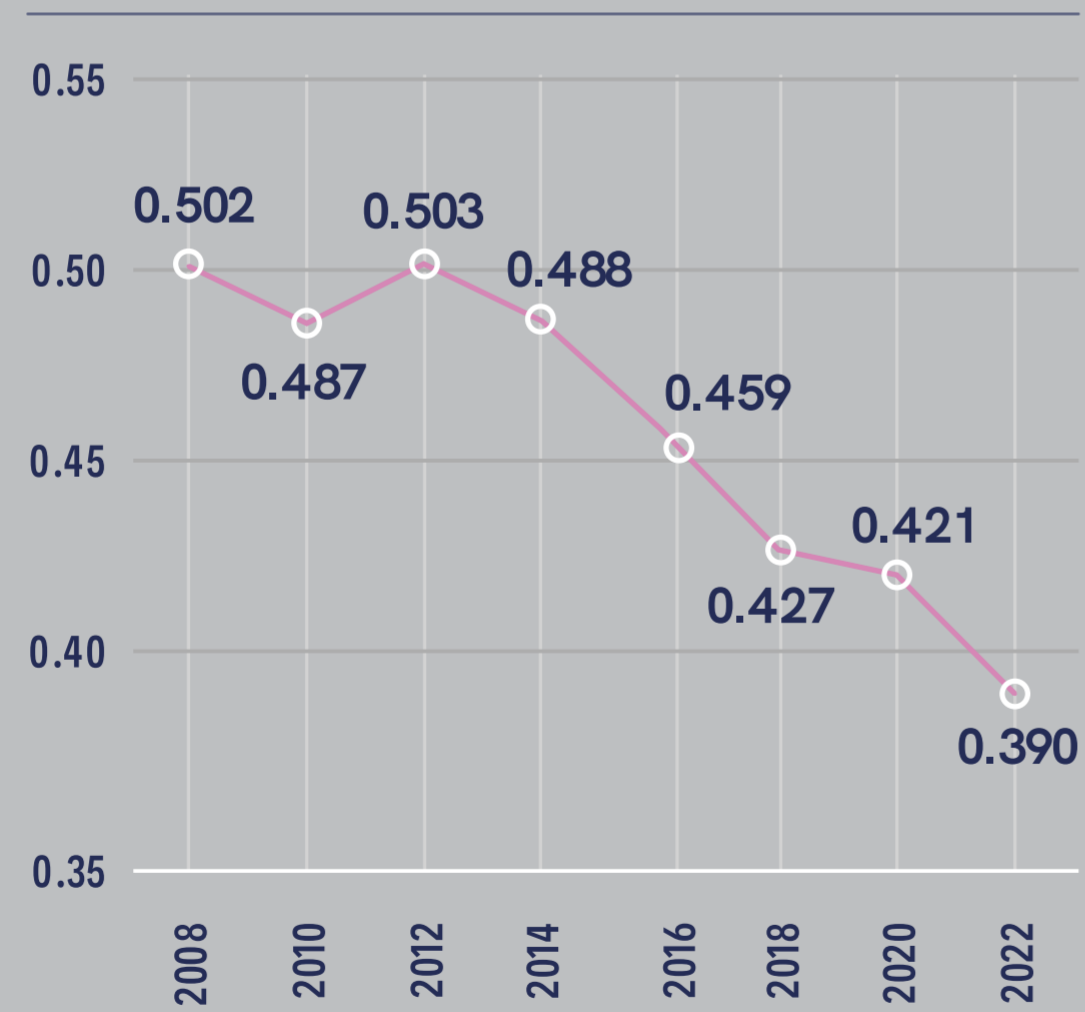


Source: Prepared by the authors with data from the National Council for the Evaluation of Social Development Policy (Poverty measurement), 2024.



The coefficient reported for Querétaro in 2022 decreased by 7.5% with respect to 2020, which suggests that, over time, citizens live in a more equitable state.

### Gini coefficient evolution in Querétaro (2008-2022)



Source: Prepared by the authors with data from the National Council for the Evaluation of Social Development Policy (Poverty measurement), 2024.



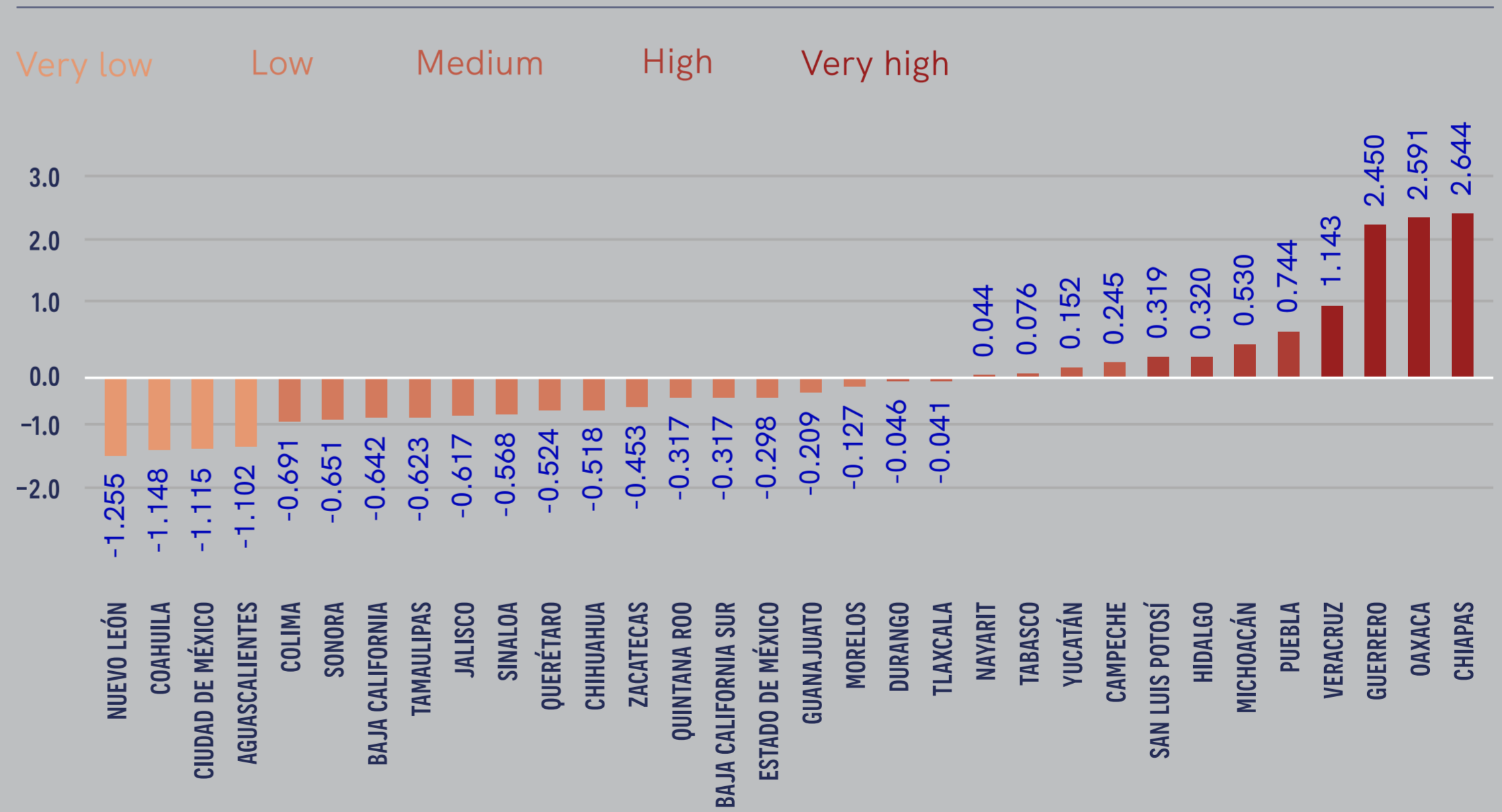


### Social lag

The Social Gap Index -calculated by the National Council for the Evaluation of Social Development Policy (CONEVAL, by its acronym in Spanish)- allows us to know people’s access to social rights and their household assets, in order to identify priority areas in matters of social development for public policy. The index is calculated and published every 5 years.

In 2020 Querétaro registered a value of -0.524, which shows a low level of social backwardness.

Social Gap Index by state (2020)

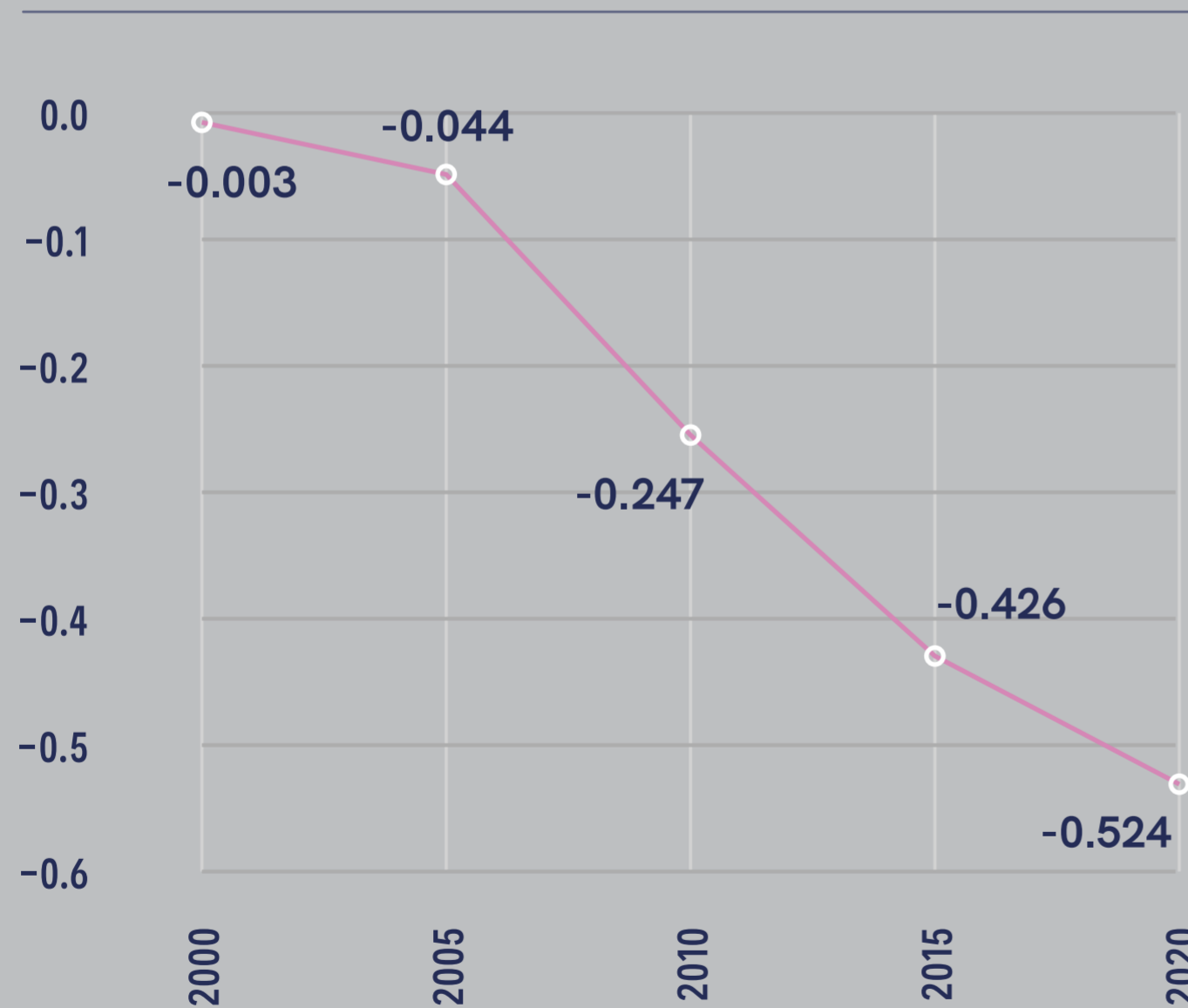


Source: Prepared by the authors with data from the National Council for the Evaluation of Social Development Policy (Social Gap Index), 2024.



Over time, the trend of the Index in the state is negative, a situation that indicates that there is increasingly less social gap.

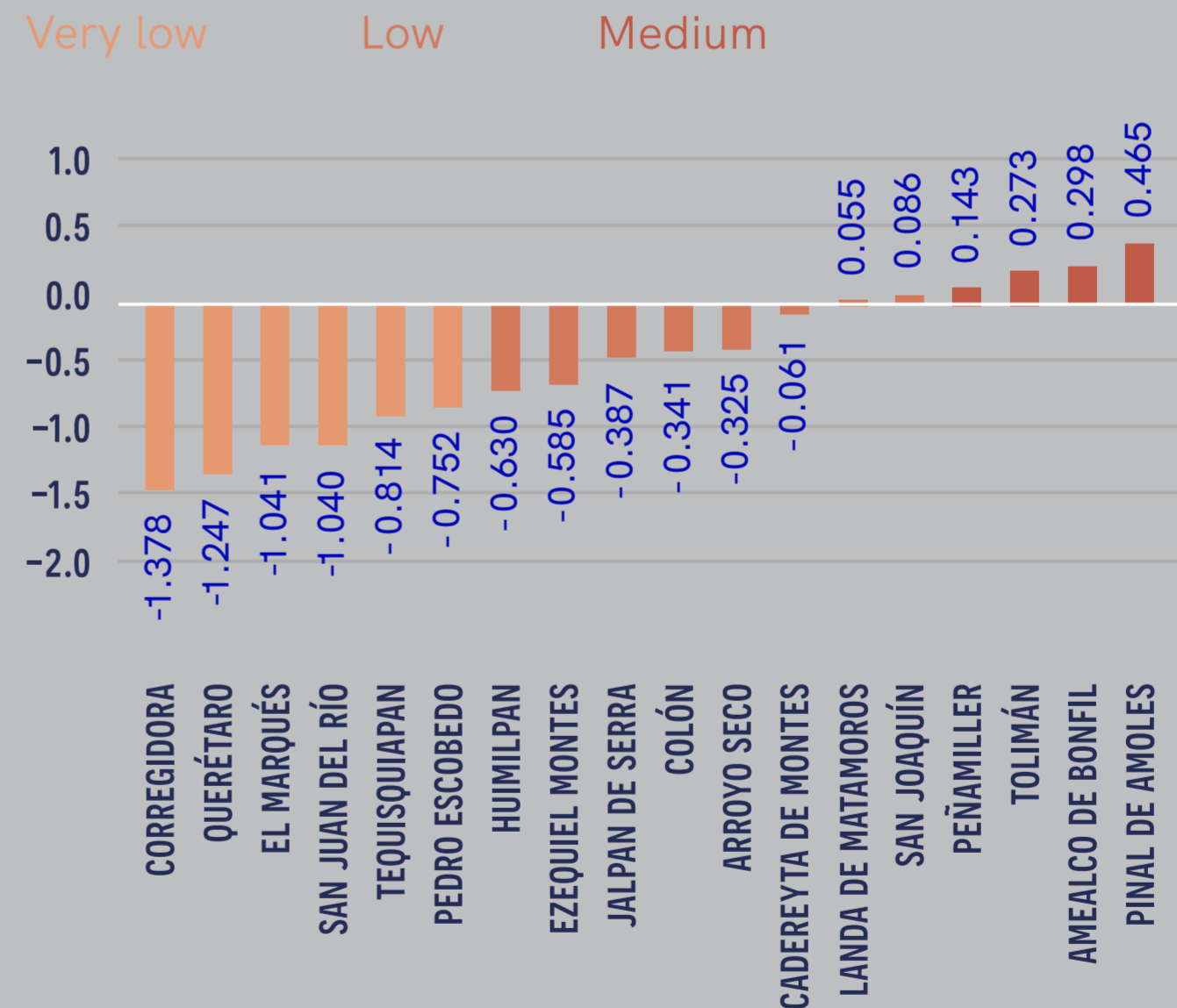
Social Gap Index Evolution in Querétaro (2000-2020)



Source: Prepared by the authors with data from the National Council for the Evaluation of Social Development Policy (Social Gap Index), 2024.

Of the 18 municipalities in the state, Corregidora stands out as the municipality with the lowest social gap, followed by Querétaro.

Social Gap Index by municipality (2020)



Source: Prepared by the authors with data from the National Council for the Evaluation of Social Development Policy (Social Gap Index), 2024.



## 3.3.4

### Regional development programs

The Ministry of Sustainable Development of the State Government, through the Regional Development Department, promotes productive projects in Querétaro through the Program for Regional Strengthening of the State of Querétaro and the Program to Support Economic Sectors.

### Regional Strengthening Program

Its general objective is to support individuals or legal entities domiciled in the State of Querétaro to start or strengthen their transformation businesses and service businesses that promote self-employment, with the purpose of balancing sectors and regions, as well as promoting the traditional activities of the state economy.

During 2023, the program provided 174 grants to various projects in 15 municipalities in the state.

The municipality of Querétaro accounted for 28.7% of total support, followed by Arroyo Seco with 11.5%, Corregidora with 10.9% and Colón with 8%.

### Beneficiaries and support granted through the Regional Strengthening Program (2023)

MUNICIPALITY	BENEFICIARIES		NUMBER OF SUPPORT	SGQ <sup>1</sup> CONTRIBUTION
	MEN	WOMEN		
Querétaro	16	75	50	\$1,151,900.50
Arroyo Seco	2	18	20	\$383,465.90
Corregidora	10	32	19	\$464,562.49
Colón	2	13	14	\$306,211.00
Tolimán	2	12	14	\$325,556.51
San Juan del Río	2	19	12	\$243,053.82
Amealco de Bonfil	2	16	11	\$179,966.99
Ezequiel Montes	3	7	10	\$320,000.00
Pinal de Amoles	2	7	9	\$177,379.12
Tequisquiapan	2	5	5	\$220,000.00
El Marqués	0	5	3	\$59,800.00
Jalpan de Serra	0	8	3	\$58,452.40
Cadereyta de Montes	2	3	2	\$69,599.99
Huimilpan	0	1	1	\$20,000.00
Pedro Escobedo	1	4	1	\$20,000.00
<b>General Total</b>	<b>46</b>	<b>225</b>	<b>174</b>	<b>\$3,999,948.7</b>

Source: Prepared by the authors with data of the Undersecretariat of Economic development (Regional Development Department (SEDESU)), 2024.

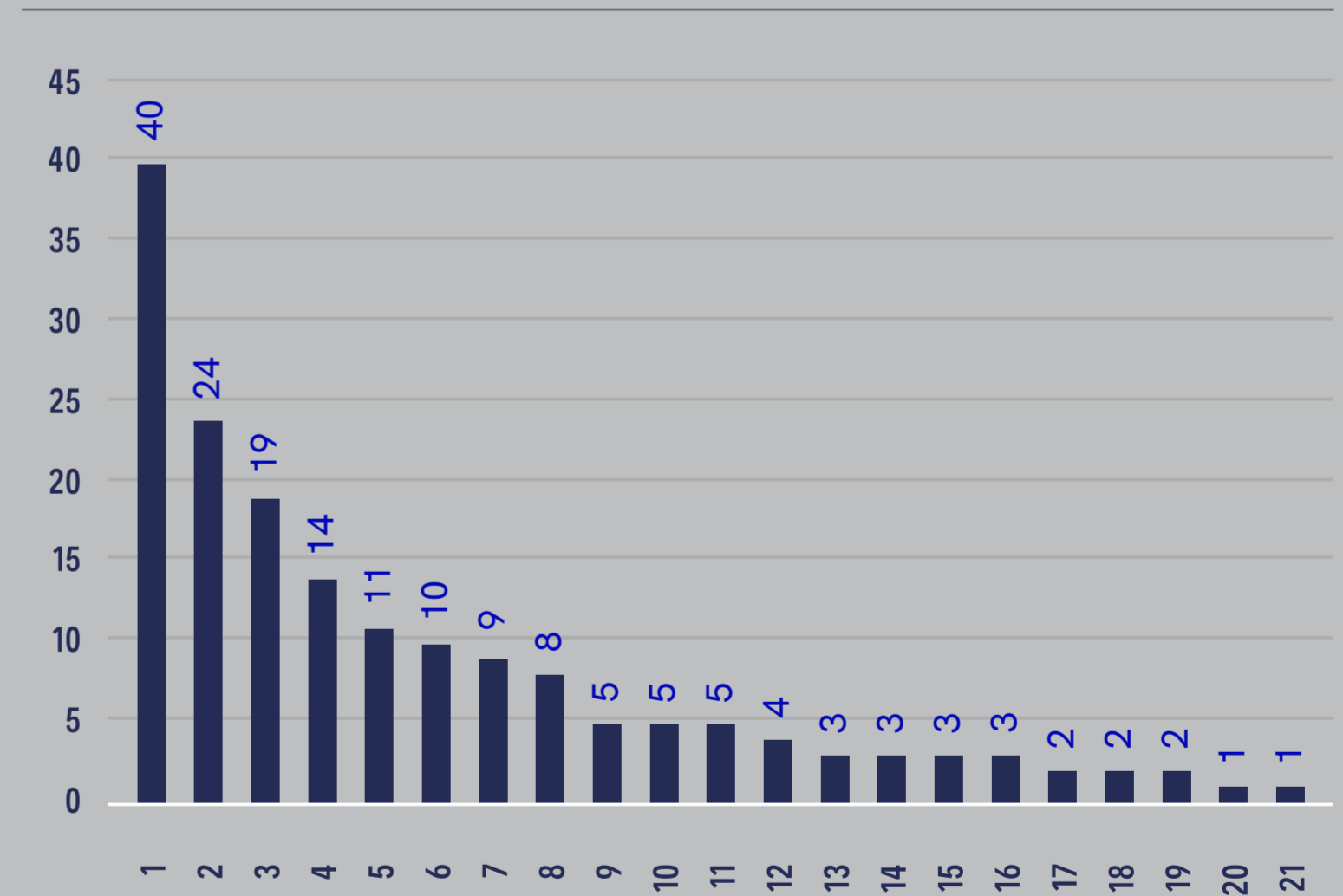
Note: <sup>1</sup> State Government of Querétaro.



Among the productive sectors supported through the program, the food and beverage sector stands out with 23% of the total support granted.

	SECTOR	NUMBER OF SUPPORT	DISTRIBUTION
1	Food and beverages	40	23.0%
2	Retail trade	24	13.8%
3	Crafts or handicrafts	19	10.9%
4	Bakery and pastry	14	8.0%
5	Beauticians and other beauty services	11	6.3%
6	Other	10	5.7%
7	Health services	9	5.2%
8	Textile	8	4.6%
9	Blacksmithing and metal derivatives	5	2.9%
10	Design and printing	5	2.9%
11	Furniture and wood by-products	5	2.9%
12	Repair services	4	2.3%
13	Stationery and photocopying	3	1.7%
14	Pharmaceutical and natural products	3	1.7%
15	Wholesale trade	3	1.7%
16	Gifts and decorations	3	1.7%
17	Service to the industry	2	1.1%
18	Physical fitness	2	1.1%
19	Laundry and dry cleaning	2	1.1%
20	Chemical, rubber and plastic	1	0.6%
21	Information technologies, cyber	1	0.6%
	<b>Total</b>	<b>174</b>	<b>100%</b>

Support granted by sector through the Regional Strengthening Program (2023)



Source: Prepared by the authors with data of the Undersecretariat of Economic development (Regional Development Department (SEDESU)), 2024.  
Note: The numbering refers to the different sectors as shown in the previous table.



### Program to Support Economic Sectors (PASE, by its acronym in Spanish)

Its objective is to promote the economic development of the state, through the promotion of mining, artisanal, agro-industrial, commercial and service activities, which, due to an extraordinary situation, fortuitous event, contingency or force majeure, have their economic activity, facilities, machinery or equipment affected and require support to continue or not lose their operation.

During 2023, 58 projects were supported, directly benefiting 3,345 people, 39.2% more than in 2022.

### Beneficiaries and support granted through the PASE (2023)

CATEGORY	BENEFICIARIES		PROJECTS	SGQ <sup>1</sup> CONTRIBUTION
	MEN	WOMEN		
Support for <i>Tianguis</i> equipment	1,914	1,290	2	\$12,039,696.6
Strengthening of Trade and/or Service Businesses	14	14	7	\$271,166.0
Boost for Agribusiness	11	10	4	\$1,974,817.2
Agribusiness Consolidation	16	35	4	\$992,267.9
Any other as determined by the Evaluation Committee	26	15	41	\$1,713,000.0
<b>General Total</b>	<b>1,981</b>	<b>1,364</b>	<b>58</b>	<b>\$16,990,947.6</b>

Source: Prepared by the authors with data of the Undersecretariat of Economic development (Regional Development Department (SEDESU)), 2024.  
 Note: <sup>1</sup> State Government of Querétaro.



## 3.3.5

## Social development programs

According to the World Bank, social development focuses on the need to put people first, thereby promoting the inclusion of vulnerable populations and creating cohesive and resilient societies.

Through the Ministry of Social Development of the State of Querétaro (SEDESOQ, by its Spanish acronym), we coordinate and guarantee the implementation of policies, programs and actions that ensure the prosperity and dignity of the people.

To this end, in 2023 SEDESOQ carried out various support programs to improve people's living conditions in the areas of housing, food, education and school transportation.

In order to improve opportunities, reduce gender inequality, enhance their talents and improve their quality of life, the current administration directs 28.7% of its programs to women.

## Beneficiaries of Social Development Programs in Querétaro (2023)

PROGRAM	BENEFICIARIES	DISTRIBUTION
Food programme	44,878	39.2%
"Contigo" Card	22,415	19.6%
School transportation	10,375	9.1%
Women With You Workshops	8,300	7.2%
Technological support	7,507	6.6%
Pensioners and retirees	5,112	4.5%
Strengthening education for incoming freshmen, best average and support for transportation expenses	5,144	4.5%
Housing	3,918	3.4%
Ecological stoves	639	16.3%
Solar heaters	1,520	38.8%
Water tanks	1,759	44.9%
Child care support	1,709	1.5%
Social development program of support and management for the regularization of irregular and social human settlements	758	0.7%
Promotion of craftsmanship	500	0.4%
Strengthening organized social participation	52	0.0%
Women's University Scholarships	134	0.1%
Social sectors in the economy	2,953	2.6%
Microcredits for women	263	0.2%
Volunteering	490	0.4%
<b>Total</b>	<b>114,508</b>	<b>100%</b>

Source: Prepared by the Ministry of Social Development (Undersecretariat of Social Programs and Infrastructure), 2024.





# 4

## Primary Sector

It comprises the production, management and optimization of natural resources and represents the main source of food for the population. The diversity of climates in the state allows the countryside to provide a wide variety of products that benefit the economic development of the region.



# 4 Primary Sector

## 4.1 Evolution of primary sector

- 4.1.1 Gross Domestic Product (GDP)
- 4.1.2 Jobs in the primary sector

## 4.2 Activities in the primary sector

- 4.2.1 Agriculture
- 4.2.2 Agricultural resources

## 4.3 Livestock

- 4.3.1 Livestock production

## 4.4 Agricultural Census 2022

## 4.5 Aquaculture and fishing

- 4.5.1 Aquaculture and fishing production
- 4.5.2 Aquaculture and fishing resources

## 4.6 Forestry

- 4.6.1 Forest production

## 4.7 Mining

- 4.7.1 Mineral extraction
- 4.7.2 Mineral resources

## 4.8 Inhabitants of rural areas



# PRIMARY SECTOR

2.2%  
OF THE STATE GDP

159,072  
HECTARES OF AGRICULTURAL LAND

## FIFTH

NATIONAL PRODUCER OF  
MEAT IN THE CARCASS

## 164,542

PEOPLE DEDICATED TO  
AGRICULTURAL ACTIVITIES

## THIRD

AQUACULTURE PRODUCER  
AMONG THE LANDLOCKED STATES

## 58.7

MILLION TONS IN MINING  
PRODUCTION

## 21.1%

OF THE POPULATION  
IS RURAL



4.1

# Evolution of primary sector

4.1.1

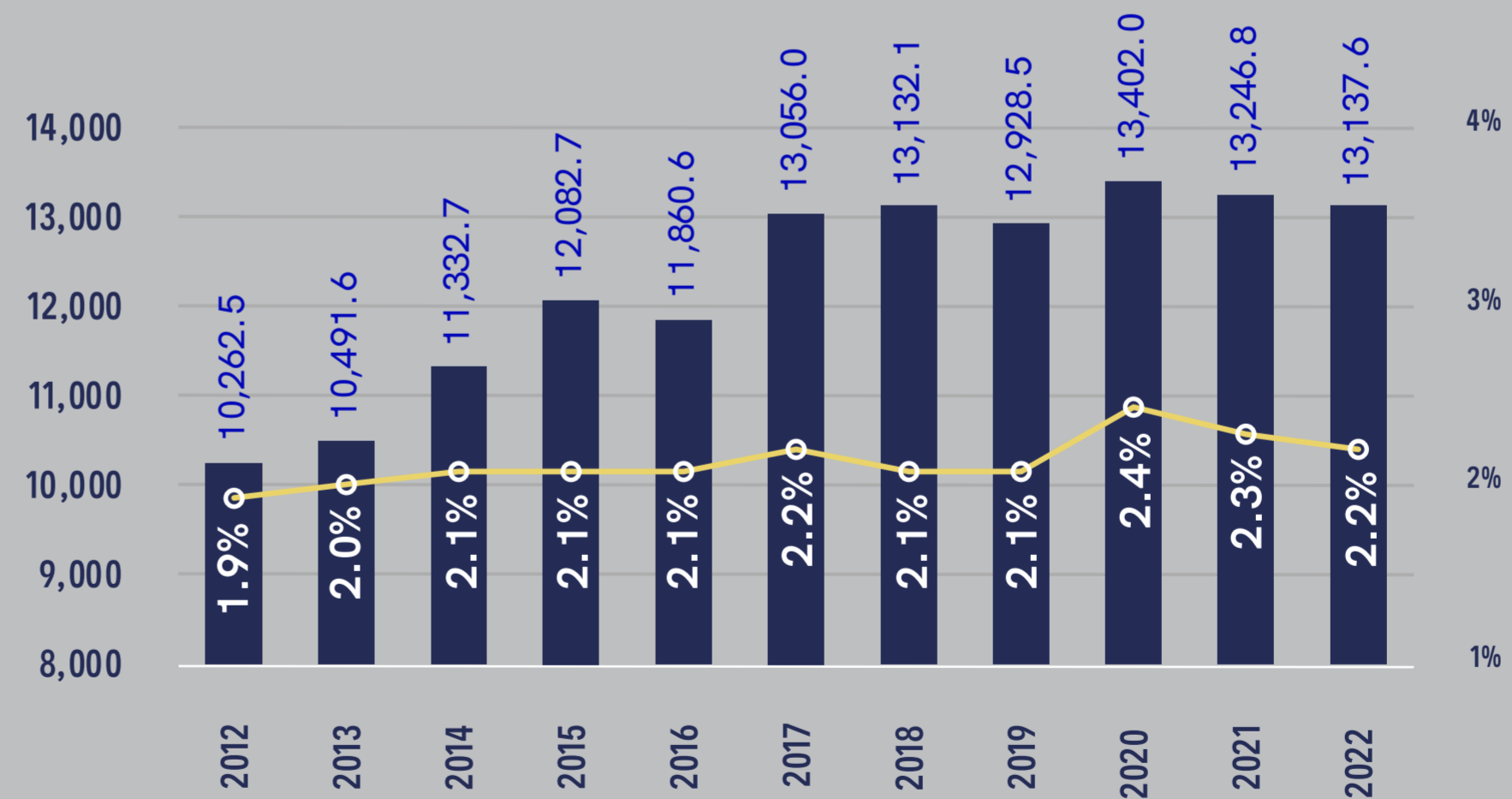
## Gross Domestic Product (GDP)

In Querétaro during 2022, the primary sector reported MXN \$13,137.6 MM at 2018 prices, a figure that represents 2.2% of the total. The amount maintained an annual variation of -0.8%. The state had a 1.6% share of the sector's GDP at the national level.

The sector's GDP was distributed as follows: animal breeding and exploitation MXN \$9,721.2 MM (74%); agriculture MXN \$3,353.5 MM (25.5%); and forestry, services related to agricultural and forestry activities MXN \$64.9 MM (0.5%).

Evolution of the Gross Domestic Product of the primary sector (2012-2022)

GDP Total GDP proportion



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (GDP by state [PIBE]; 2018 base), 2024.  
Note: Figures are expressed in millions of pesos (MXN MM) at 2018 prices.



### 4.1.2

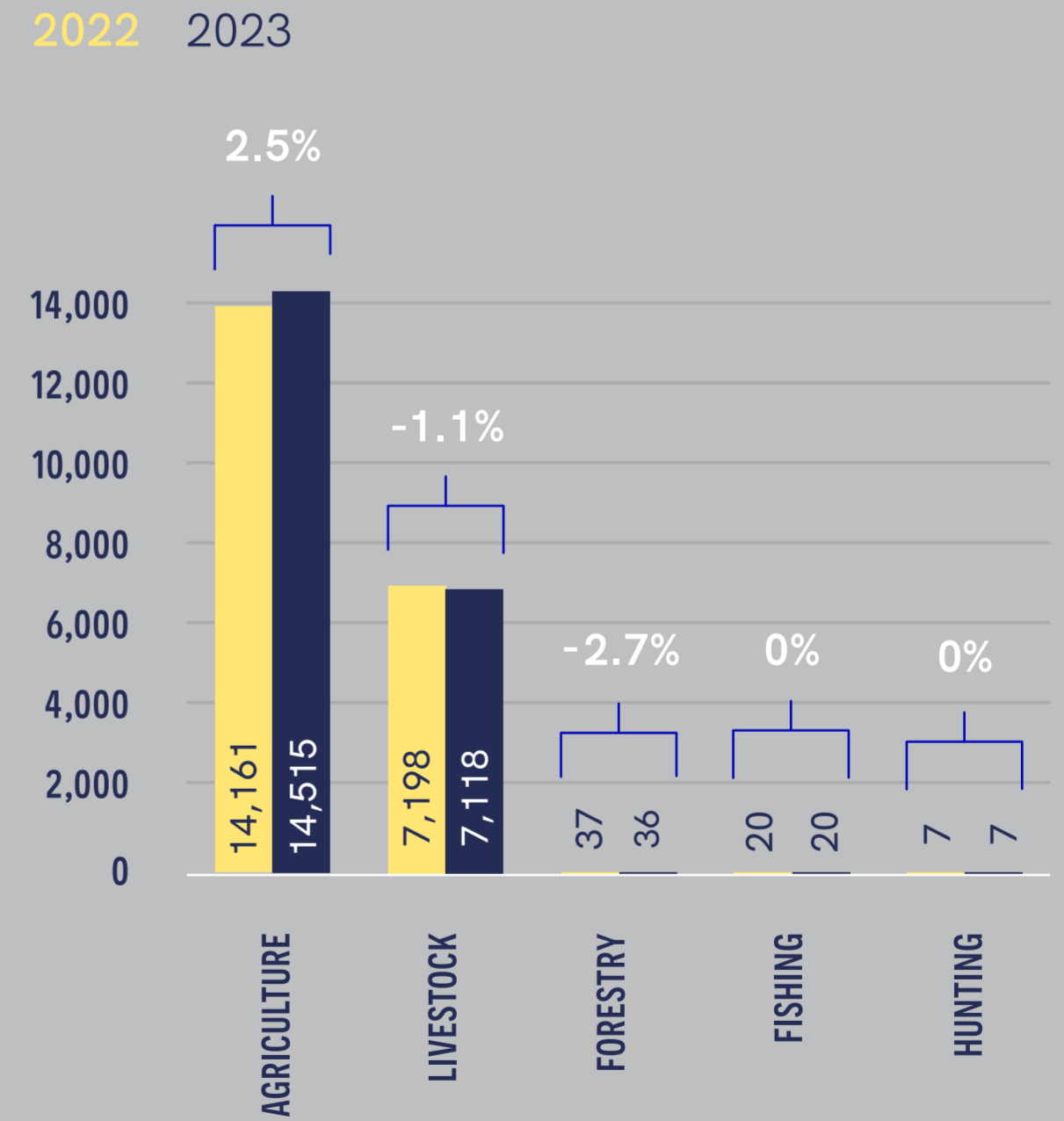
## Jobs in the primary sector

In December 2023, the Mexican Social Security Institute (IMSS) counted 21,696 people formally working in the sector, 1.3% higher than the number reported in 2022. Of this total, 37.6% were women and 62.4% were men. The average salary

remained at \$380.80 for women and \$446.42 for men.

Of the total number of jobs in this sector nationwide (748,788), Querétaro accounted for 2.9%.

### Jobs in the primary sector (December 2022-2023)



Source: Prepared by the authors with data from the Mexican Social Security Institute (Dynamic consultation, jobs by economic sector), 2024.



## 4.2

## Activities in the primary sector

It comprises obtaining raw materials through the use of natural resources. The main activities in this sector are agriculture, livestock, forestry, beekeeping, hunting, fishing, and forestry and mineral exploitation.

Through the Ministry of Agricultural Development (SEDEA, by its acronym in Spanish), we seek to generate the production of sufficient food and raw materials to meet the income needs of producers, while preserving sustainable development and the proper use of the state's natural resources.

During 2023, SEDEA granted support with the objective of addressing drought and strengthening production, among which the following stand out:

- ▶ First stage of support to 2,117 livestock producers with 6,532 bales of fodder and 428 water trips for livestock use. The purpose was to reduce the economic impact caused by the drought.
- ▶ 424.5 tons of oat seed, 32.2 tons of chickpea seed and 68 packages of corn to 2,888 cattle, sheep and goat producers for the production of fodder to help improve livestock production parameters.
- ▶ Productive projects were supported for the benefit of 4,765 producers, in conjunction with the municipal and state governments.
- ▶ Irrigation technification was carried out on 1,674.5 hectares, contributing to increased crop production and responsible water management in the agricultural sector, benefiting 630 producers in the state.
- ▶ We delivered 4,600 tons of corn for human consumption, benefiting 18,738 rainfed agricultural producers, representing a total of 31,196 hectares benefited, in order to continue to address the economic impact caused by the severe, extreme and exceptional persistent drought throughout the state.



## 4.2.1

**Agriculture**

In 2023 Querétaro registered 1,944,558.4 tons of agricultural products, with a production value of MXN \$6,073.4 MM.

**Agricultural production**

According to the Agrifood Panorama 2023, published by the Ministry of Agriculture and Rural Development (SADER, by its acronym in Spanish), Mexico ranked 12th, with the highest world food production, as well as the highest production of agricultural crops. With this, it decreased by one position compared to 2022.

During 2023 agricultural production, of the 10 main products in the state, represented 94.5% of the total production volume and 79.5% of the total production value. Production was led by green forage corn, reaching 640,332.8 tons with a value of 592,092.4 pesos.

**Main agricultural products produced in Querétaro (2022-2023)**

PRODUCT	VOLUME		VAR. % 2022-2023	PRODUCTION VALUES 2023
	2022	2023		
Green forage corn	644,452.1	640,332.8	-0.6%	592,092.4
Green alfalfa	571,795.5	579,222.1	1.3%	449,780.6
Grain corn	206,628.6	240,273.7	16.3%	1,648,571.8
Green fodder oats	119,934.5	115,489	-3.7%	68,194.6
Red tomato	90,979.8	99,277.9	9.1%	964,107.3
Green fodder triticale	42,036	45,823	9%	33,710.3
Green chili	30,402.8	44,721.6	47.1%	830,162.4
Pastures and meadows	31,362.2	32,206.5	2.7%	22,345.1
Lettuce	19,637	21,422.4	9.1%	114,682.7
Grain barley	21,412.4	18,366.8	-14.2%	106,995.5

Source: Prepared by the authors with data from the Agri-food and Fisheries Information Service, 2024.

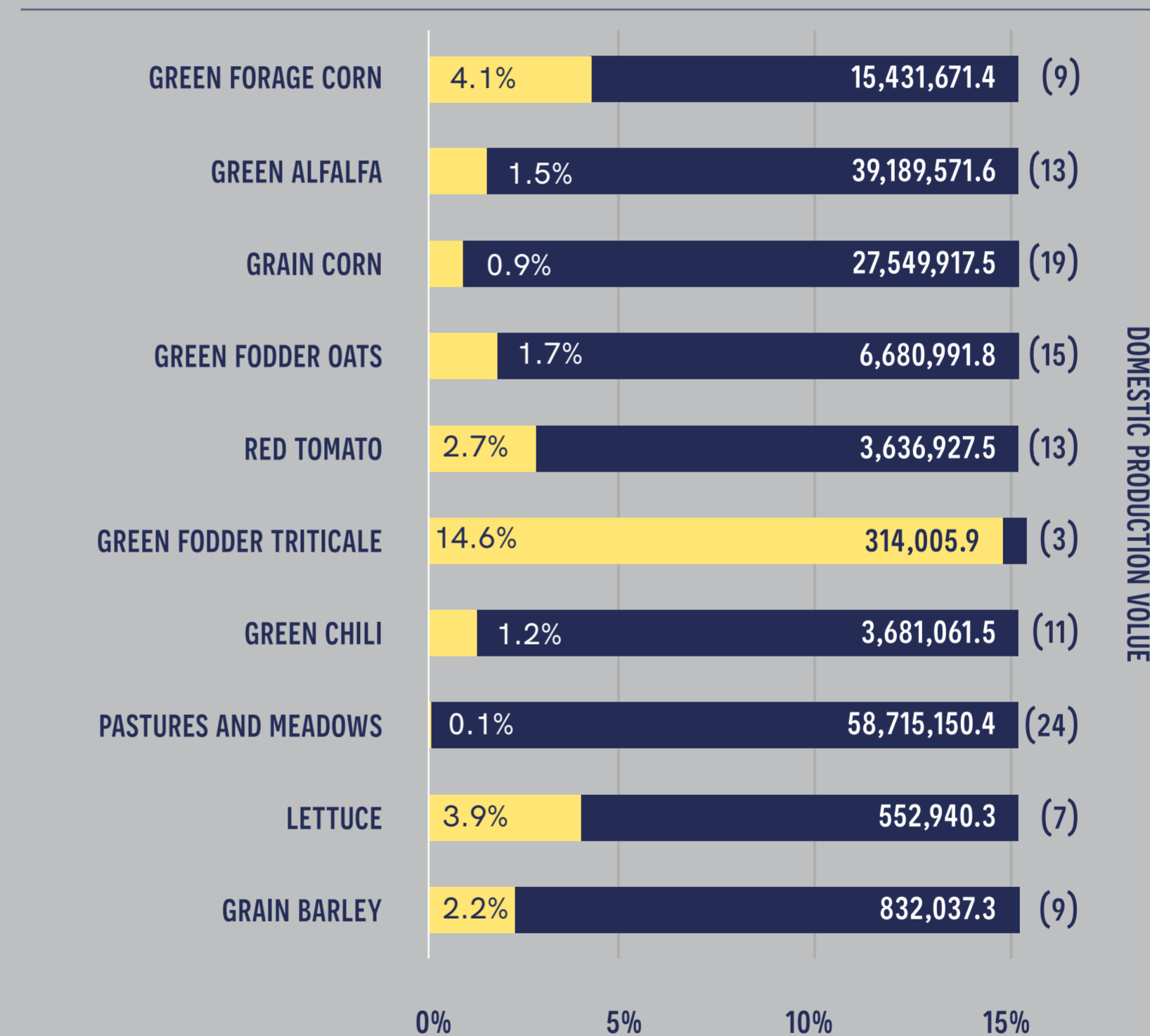
Note: Volume figures are expressed in tons.

Production value figures are expressed in thousands of pesos.



The contribution to national production of the main agricultural products cultivated in the state is less than 15%. Fodder triticale has the highest share, ranking 3rd among the states with the highest contribution to national production.

### Contribution to national production of the main agricultural products in Querétaro (2023)



Source: Prepared by the authors with data from the Agri-food and Fisheries Information Service, 2024.  
Note: Volume figures are expressed in tons.  
The numbers in parentheses refer to Querétaro's position among the states that contribute the most to national production.





## Winemaking state

Mexico is a country where very good quality wine is produced, as its soils and microclimates are conducive to the cultivation of grapes.

Wine consumption in Mexico has increased 22% in the last decade, which has opened the door for more states in the country to join the production, thanks to its diverse ecosystems.

In 2023, Mexico closed the year with 400 wineries, producing close to 36 million tons of different types of wine, and 8,633 hectares have been allocated to the industrial production of this beverage.

There are currently 16 states in the country that produce wine; however, wine production, commercialization and tourism are mostly concentrated in the north and center, with Baja California and Querétaro as the largest wine producing states, the latter having the 2nd place nationally in terms of wine production.

The state currently has 600 hectares under cultivation and the state continues to be positioned as the country's main ecotourism destination. Today, 11 municipalities make up the state's ecotourism zone.

## Industrial grape production

This type of grape is used to produce juices, jellies and mainly wines. According to the Agrifood Panorama, during 2022, national production amounted to 78,093 tons, a volume 3.9% higher than the previous year. This fruit represented 0.3% of the national fruit production. August, September and October were the months with the highest availability.

Querétaro was the 6th largest producer of industrial grapes in Mexico, accounting for 6.6% of the total. The production volume was 3,839 tons, a figure that maintains an annual variation of 34.6%, placing the state as the one with the highest annual growth among the 10 with the highest production of industrial grapes.



### Agricultural cycles

In Querétaro there are three types of crops: 1) spring-summer; 2) autumn-winter; and 3) perennial crops, which are grown through irrigation and rainfed modalities.

In 2023, the agricultural cycle that reported the highest production was spring-summer, concentrating 51.8% of it, but without considering the production of rose and maguey, since they are crops located in the perennial cycle. Of the crops grown, 97.1% were irrigated and only 2.9% rainfed.

### Agricultural production by cycle and mode in Querétaro (2023)

AGRICULTURAL CYCLE	SYSTEM	AREA PLANTED (HA)	HARVESTED AREA (HA)	PRODUCTION (TON)	PRODUCTION VALUES (THOUSANDS OF PESOS)
Spring-summer	Irrigation	34,546.3	34,491.3	955,593.6	3,299,645.8
	Rainfed	57,419.4	32,561.4	51,047.2	343,844.7
<b>Total spring-summer cycle</b>		<b>91,965.6</b>	<b>67,052.6</b>	<b>1,006,640.8</b>	<b>3,643,490.5</b>
Fall-winter	Irrigation	12,039	12,039	316,659.2	1,410,492.5
	Rainfed	298	298	331.7	800.7
<b>Total fall-winter cycle</b>		<b>12,337</b>	<b>12,337</b>	<b>316,991</b>	<b>1,411,293.2</b>
Perennial crops	Irrigation	9,954.8	9,867.5	616,870.3	987,631
	Rainfed	1,127	1,126	4,056.5	30,944.3
<b>Perennial crops total</b>		<b>11,081.8</b>	<b>10,993.5</b>	<b>620,926.8</b>	<b>1,018,575.3</b>
<b>Agricultural production total</b>		<b>115,384.5</b>	<b>90,383.2</b>	<b>1,944,558.4</b>	<b>6,073,359</b>

Source: Prepared by the authors with data from the Agri-food and Fisheries Information Service, 2024.

Note: The information does not include rose and agave production, because during the consultation period, the information for both crops had not been published.



### Main products by cycle

In Querétaro during 2023, production of the 10 main products in the spring-summer cycle accounted for 98% of the total. In autumn-winter the participation was 90.7% and in perennials 99.9%.

### Main products by cycle in Querétaro (2023)

Production increased    Production decreased    Added to the list in 2023

SPRING-SUMMER	PRODUCTION	FALL-WINTER	PRODUCTION	PERENNIAL	PRODUCTION
Green forage corn	628,501.8	Green fodder oats	112,750.6	Alfalfa	579,222.1
Grain corn	239,969.4	Red tomato	56,769.3	Pastures and meadows	22,427.4
Red tomato	42,508.6	Green fodder triticale	45,823	Asparagus	8,794.1
Green chili	34,434.5	Grain barley	18,366.8	Grape	3,875.8
Lettuce	11,490.9	Green forage corn	11,831	Orange	2,195.9
Green tomato	9,107.5	Cucumber	11,013.4	Nopales	1,407.6
Green forage sorghum	6,338.4	Green chili	10,287	Apple	819.3
Broccoli	5,624.8	Lettuce	9,931.5	Prickly pear	500.4
Pastures and meadows	4,780.9	Grain triticale	5,445	Avocado	435.9
Onion	4,141.1	Broccoli	5,286.4	Mango	384.1

Source: Prepared by the authors with data from the Agri-food and Fisheries Information Service, 2024.

Note: The information does not include rose and agave production, because during the consultation period, the information for both crops had not been published.



## Productive diversity

By 2023, agricultural production in Querétaro maintained the cultivation of 51 products, which were divided between open field and greenhouse crops. These products were distributed as

follows: 37.3% vegetables; 23.5% fruits; 15.7% fodder; 7.8% cereals; 5.9% dried pulses; 3.9% industrial; and 6% oilseeds, tubers and others.

### Productive diversity in Querétaro (2023)

#### UNCOVERED

##### Cereals

- Grain barley
- Grain corn
- Wheat grain
- Grain triticale

##### Fodder

- Green alfalfa
- Green fodder oats
- Fodder chickpea seed
- Green forage corn
- Pastures and meadows
- Green forage sorghum
- Grain sorghum
- Green fodder triticale

##### Fruit

- Avocado
- Peach
- Pomegranate
- Guava
- Lemon
- Mango
- Apple
- Orange
- Nut
- Pear
- Prickly pear
- Blackberry

##### Vegetables

- Garlic
- Artichoke
- Celery
- Broccoli
- Zucchini
- Onion
- Dry chili
- Green chili
- Cauliflower
- Corn
- Asparagus
- Spinach
- Jicama (Mexican turnip)
- Lettuce
- Nopales
- Red tomato
- Green tomato
- Carrot

##### Industrial

- Coffee cherry
- Grape
- Dried pulses**
- White peas
- Bean
- Grain chickpea seed

##### Oilseeds

- Peanut

##### Tubers

- Sweet potato

#### GREENHOUSE

##### Vegetables

- Green chili
- Cucumber
- Red tomato

##### Others

- Mushrooms and fungi

Source: Prepared by the Ministry of Agricultural Development with data from Agri-food and Fisheries Information Service, 2024.



### Area planted and harvested

A total of 115,384.5 hectares of planted area were recorded for 2023 (49% irrigated and 51% rainfed), representing an annual growth of 6.5%. In terms of harvested area, 90,383.2 hectares were reported (62.4% irrigated and 37.6% rainfed), maintaining an annual variation of -1.9%.

### Area planted and harvested in Querétaro (2019-2023)

YEAR	PLANTED			HARVESTED		
	IRRIGATION	RAINFED	TOTAL	IRRIGATION	RAINFED	TOTAL
2019	61,568.1	75,399.1	136,967.2	60,777.1	53,052.9	113,830.0
2020	62,554.4	77,568.6	140,123.0	59,705.9	58,895.6	118,601.5
2021	60,351	83,063.6	143,414.6	55,872	77,270.6	133,142.6
2022	57,925.4	50,393.7	108,319.0	57,830.1	34,312.7	92,142.8
2023	56,540.1	58,844.4	115,384.5	56,397.9	33,985.4	90,383.2

Source: Prepared by the authors with data from the Agri-food and Fisheries Information Service, 2024.

Note: Figures are expressed in hectares.





### 4.2.2

## Agricultural resources

Agriculture plays a fundamental role in the development and well-being of the population, so having fertile soil, water and the work of farmers is of great importance for the production of agricultural resources to meet food needs.

### Fields infrastructure

Querétaro has 159,072 hectares of agricultural land in its 18 municipalities; about 66% of the agricultural land is rainfed and the remaining 34% is irrigated.

### Technified agricultural area in Querétaro (2023)

IRRIGATION SYSTEM	BENEFITED PRODUCERS	TECHNIFIED IRRIGATED AGRICULTURAL AREA (HECTARES)
Multiple gates	628	1,658
Dripping	2	16.5
<b>Total</b>	<b>630</b>	<b>1,674.5</b>

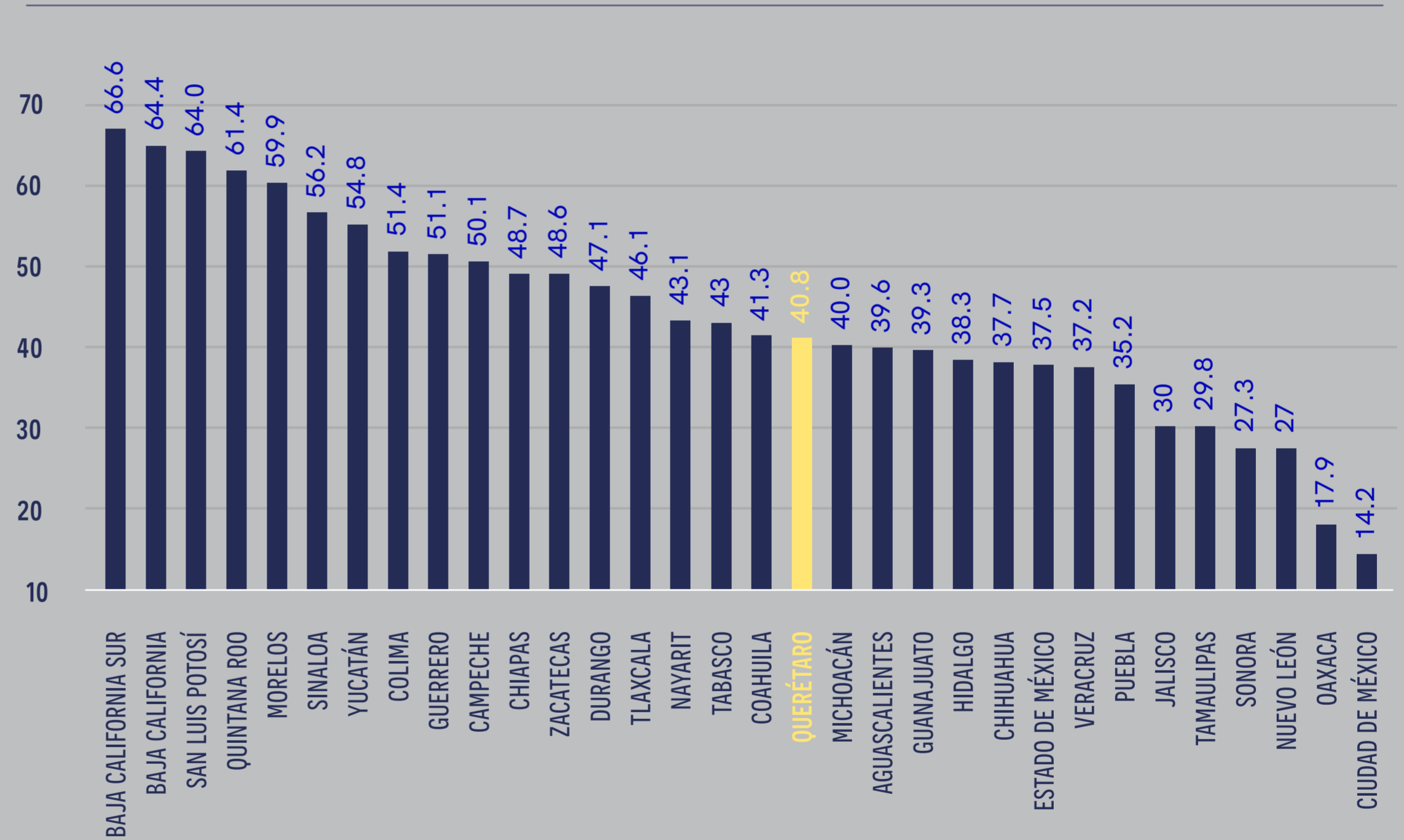
Source: Prepared by the Ministry of Agricultural Development with data from de Hydro-agricultural Infrastructure Directorate, 2024.



## Common land and communities

In 2023, at the national level, a total of 82,229,070.3 hectares were common land or ejidos, that is, 41.9% of the territory. Querétaro ranked 18th among the states with the highest proportion of ejido land.

Proportion of ejido land area to total land area by state (2023)



Source: Prepared by the authors with data from the National Agrarian Registry (Ejido land surface registered by state), 2024.

Note: Figures are expressed as a percentage.

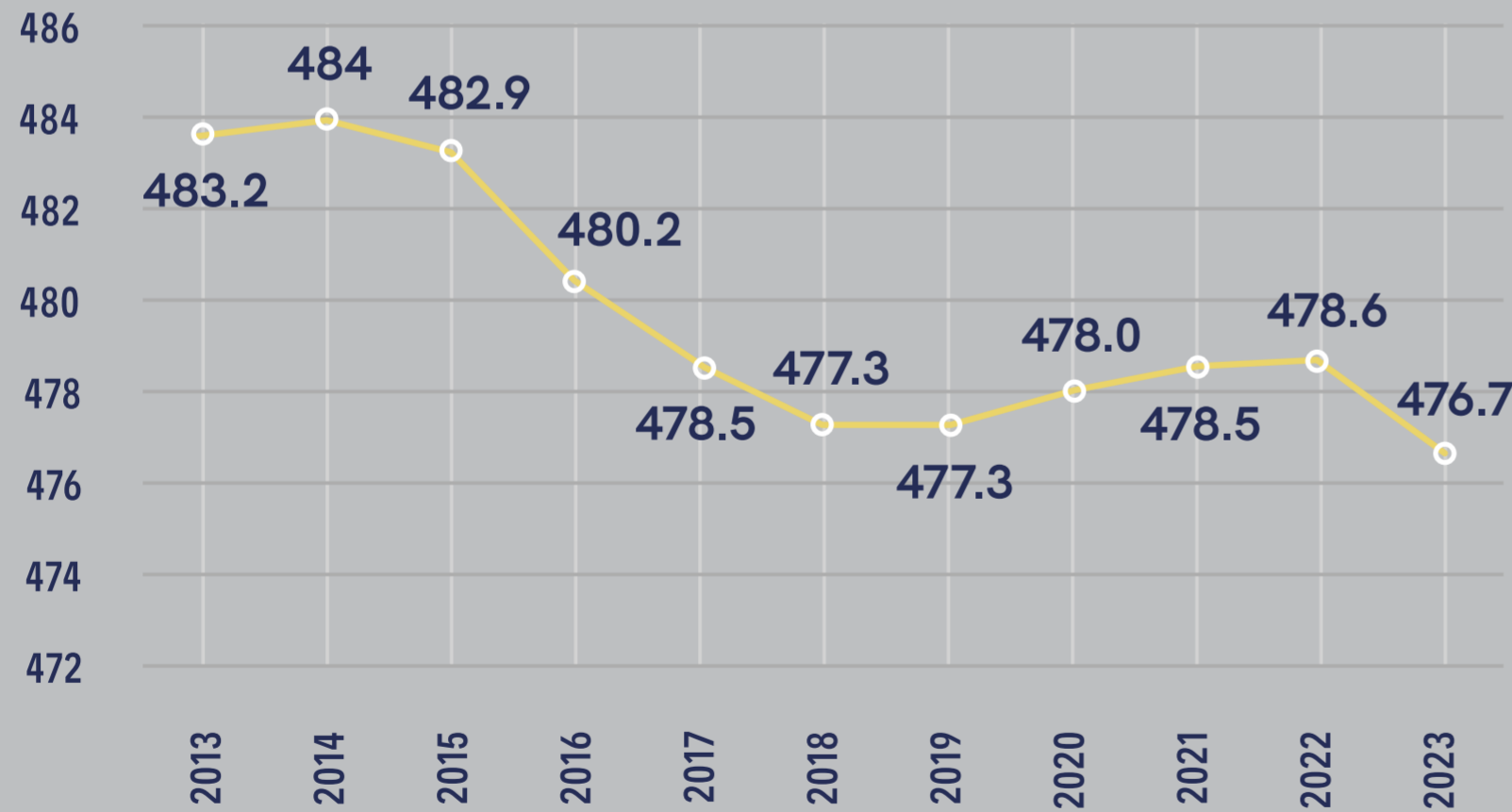
The calculation was based on ejido land area and total land area by state.



The ejido area in Querétaro totaled 476,681.8 hectares in 2023, a figure that maintained a variation of -0.4% with respect to the previous year and -1.4% compared to 2013.

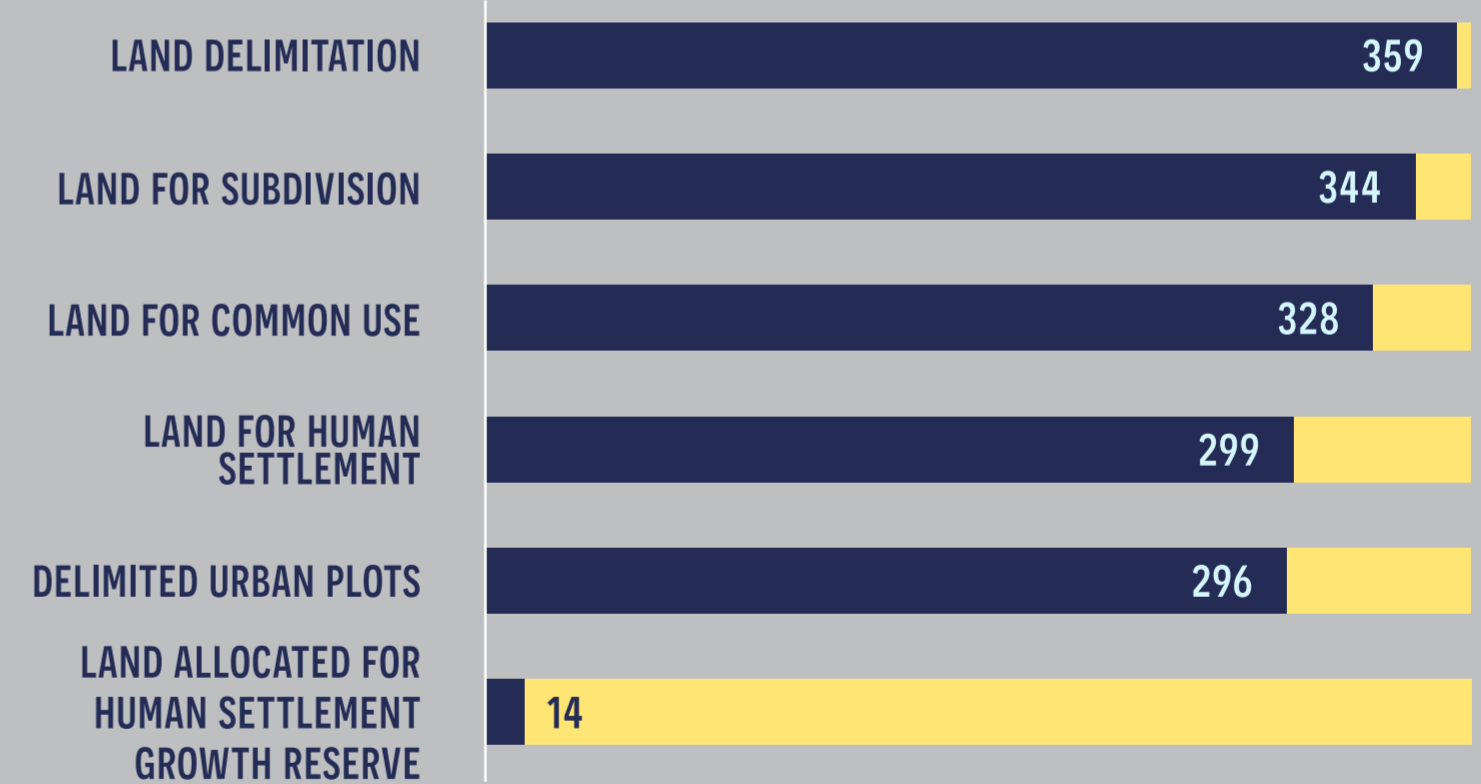
There are 29,827 ejidos registered nationwide. Querétaro has 1.2%, or 364, of the total, 359 have land delimitation.

### Registered ejido land in Querétaro (2013-2023)



Source: Prepared by the authors with data from the National Agrarian Registry (key indicators in terms of Social Property), 2024.  
Note: Figures are expressed in thousands of hectares.

### Characteristics of the registered ejidos in Querétaro (2023)



Source: Prepared by the authors with data from the National Agrarian Registry (key indicators in terms of Social Property), 2024.

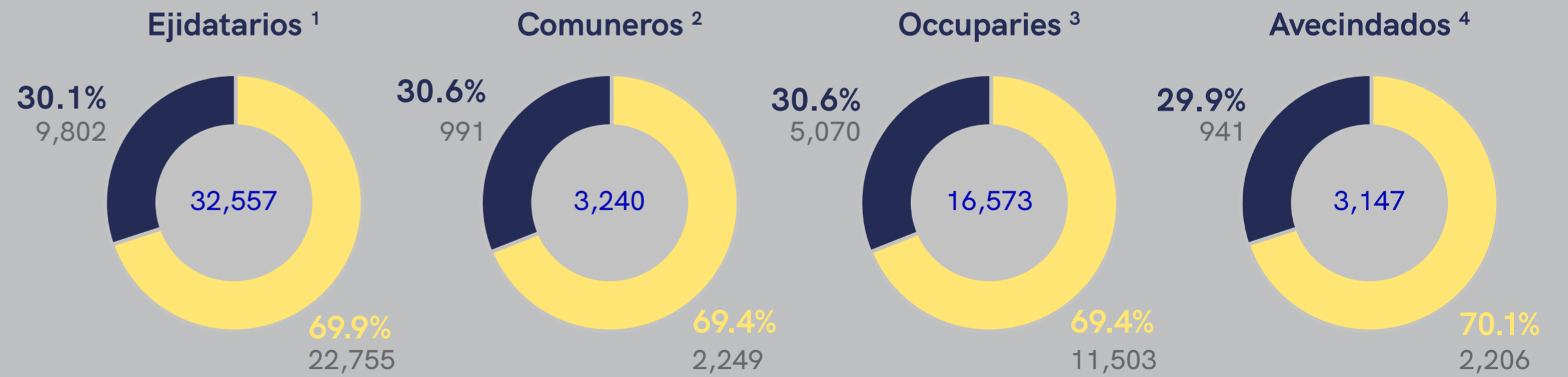




In the state, 55,517 agrarian subjects were registered in certified agrarian communities, of which 58.6% were ejidatarios (owners of ejidos), 29.9% were occuparies, 5.8% were comuneros (community members) and 5.7% were avecindados (incoming residents).

### Subjects by agrarian quality in Querétaro (2023)

Women Men



Source: Prepared by the authors with data from the National Agrarian Registry (key indicators in terms of Social Property), 2024.

Note: <sup>1</sup> They have at least a valid land parcel or common use certificate or are those who have ejidatario status even though no documents have been issued to them.

<sup>2</sup> They have at least a valid land parcel or common use certificate or are those who have the quality of comunero even without documents.

<sup>3</sup> They have at least one valid land parcel or common use certificate.

<sup>4</sup> They have at least one valid land parcel or common use certificate.



### Price of agricultural inputs

In Querétaro, according to the National Information and Market Integration System (SNIIM, by its acronym in Spanish), during the second half of 2023, the highest price was reported for diammonium phosphate.

In 2023, the frequent prices of the 7 products listed presented decreases of more than 20%, compared to those reported in 2022.

#### Price<sup>1</sup> of agricultural inputs by commercial presentation in Querétaro (2023)

PRODUCT	CONCENTRATION	SOURCE	MUNICIPALITY	FREQUENT PRICING <sup>1</sup>
Potassium chloride	00-00-60	Manufacturer	Querétaro	9,929.4
Triple 17 NPK complex	17-17-17	Manufacturer	Querétaro	10,608.8
Phosphonitrate	31-04-00	Manufacturer	Pedro Escobedo	9,850
Diammonium phosphate	18-46-00	Manufacturer	Querétaro	12,699.2
Ammonium sulfate	20.5-00-00	Manufacturer	Querétaro	6,530
Simple superphosphate	00-20-00	Manufacturer	Querétaro	6,240
Urea	46-00-00	Manufacturer	Querétaro	8,170

Source: Prepared by the Ministry of Agricultural Development with data from the Ministry of Economy (National Information and Market Integration System), 2024.

Note: Figures refer to the second half of December 2023, except for Phosphonitrate, which refers to the first half of 2023.

<sup>1</sup> Price per ton.

#### Comparative of the frequent price<sup>1</sup> of agricultural inputs in Querétaro (2022-2023)



Source: Prepared by the authors with information from the Ministry of Agricultural Development (Ministry of Economy - National Information and Market Integration System), 2024.

Note: Figures refer to the second half of December 2022 and 2023, except for Phosphonitrate, which refers to the first half of 2023.

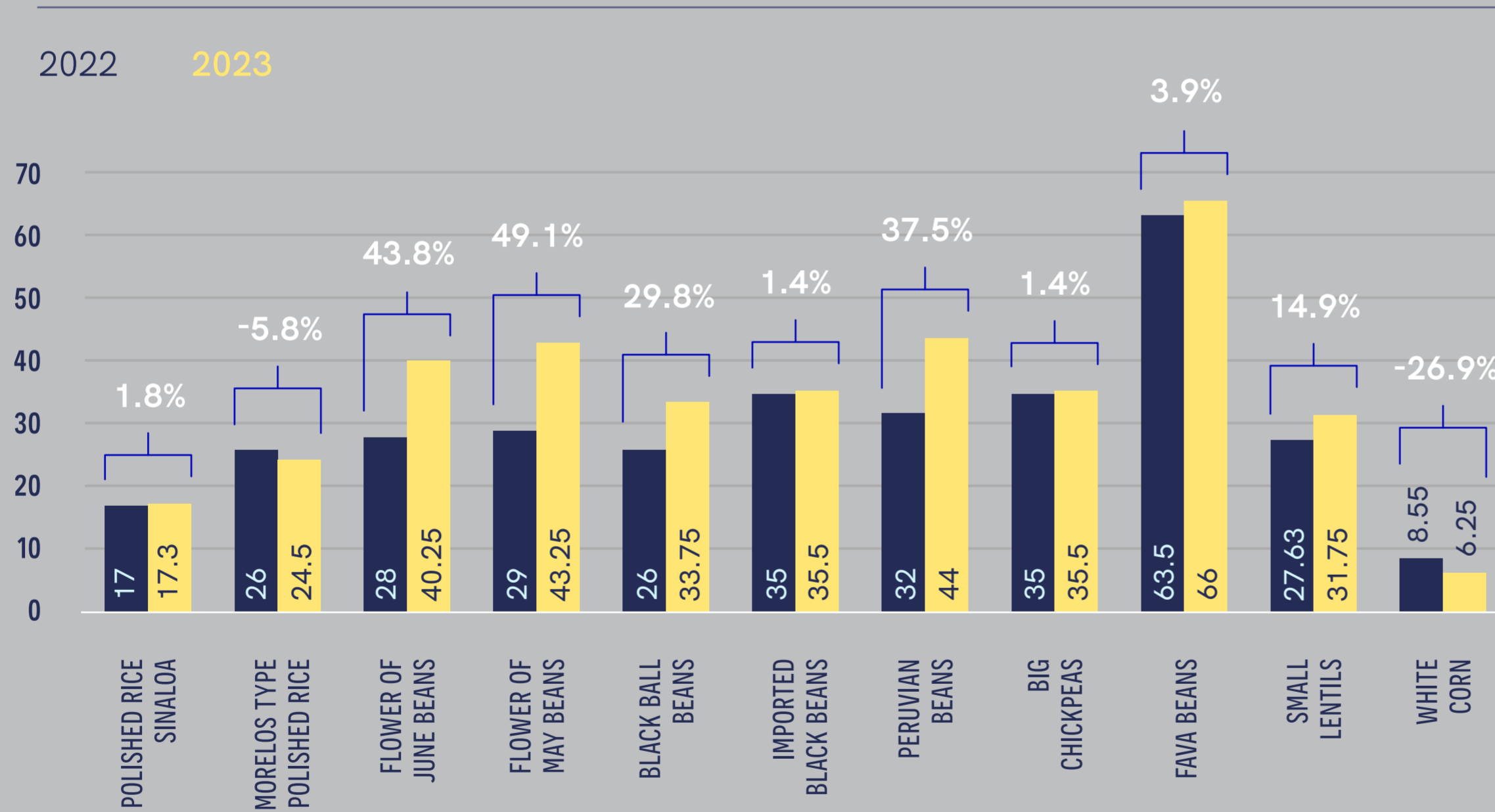
<sup>1</sup> Price per ton.



### Prices of agricultural products

At the end of 2023, the prices of basic grains showed an increase compared to the same period in 2022, except for white corn and Morelos polished rice.

Price<sup>1</sup> of basic grains at wholesale prices at the Querétaro Food Market (December 2022-2023)



Source: Prepared by the authors with data from the Ministry of Economy (National Information and Market Integration System), 2024.

Note: <sup>1</sup> Average price per kilogram marketed in 50 kg bags.

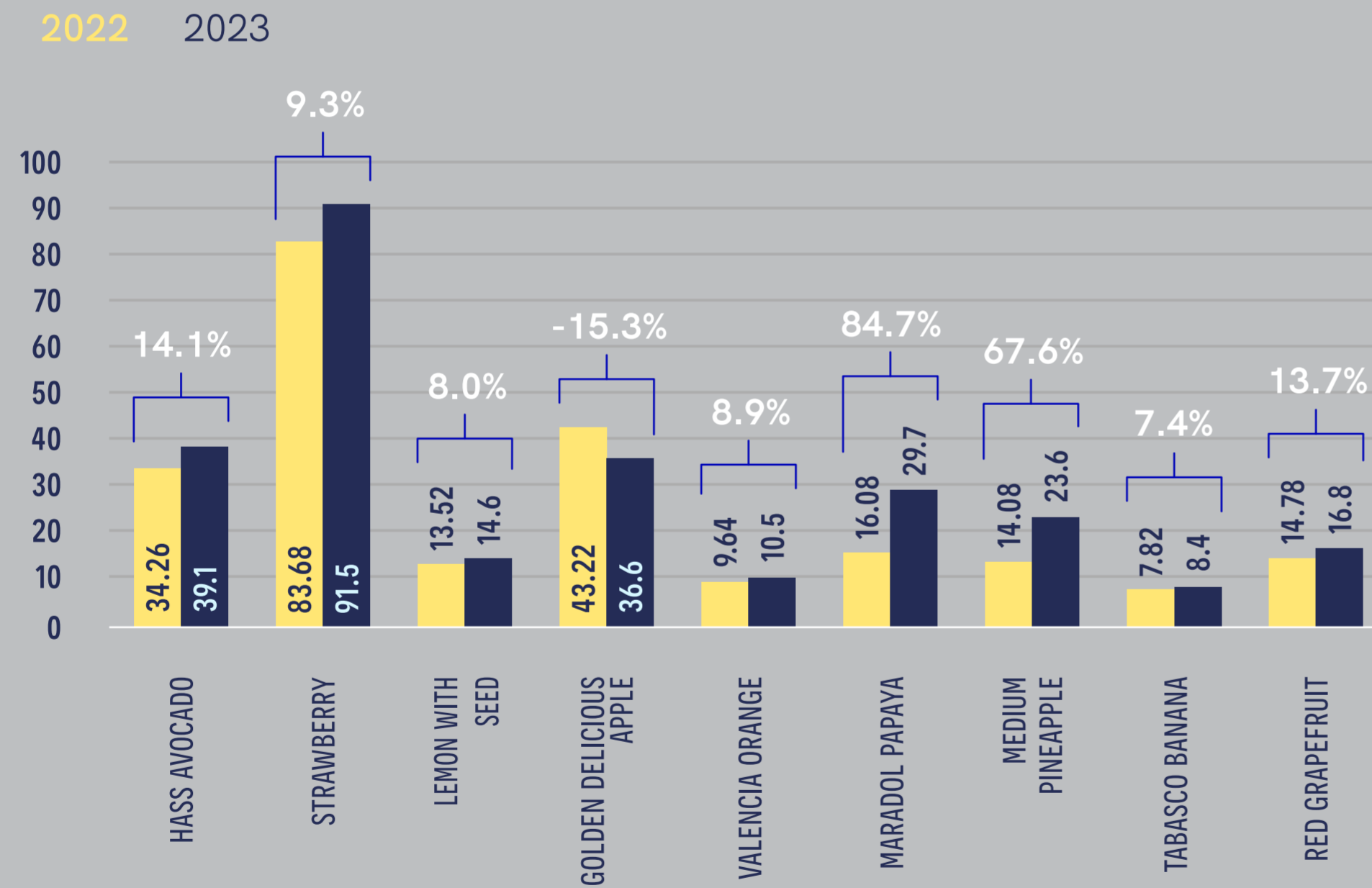
Monthly average of frequent pricing reported from the first business day to the last business day of the month.





On the other hand, fruits showed price increases, with maradol papaya and medium pineapple showing the largest increases, while golden delicious apple was the only product to show a 15.3% decrease.

Price<sup>1</sup> of wholesale fruit at the Querétaro Food Market (December 2022-2023)



Source: Prepared by the authors with data from the Ministry of Economy (National Information and Market Integration System), 2024.

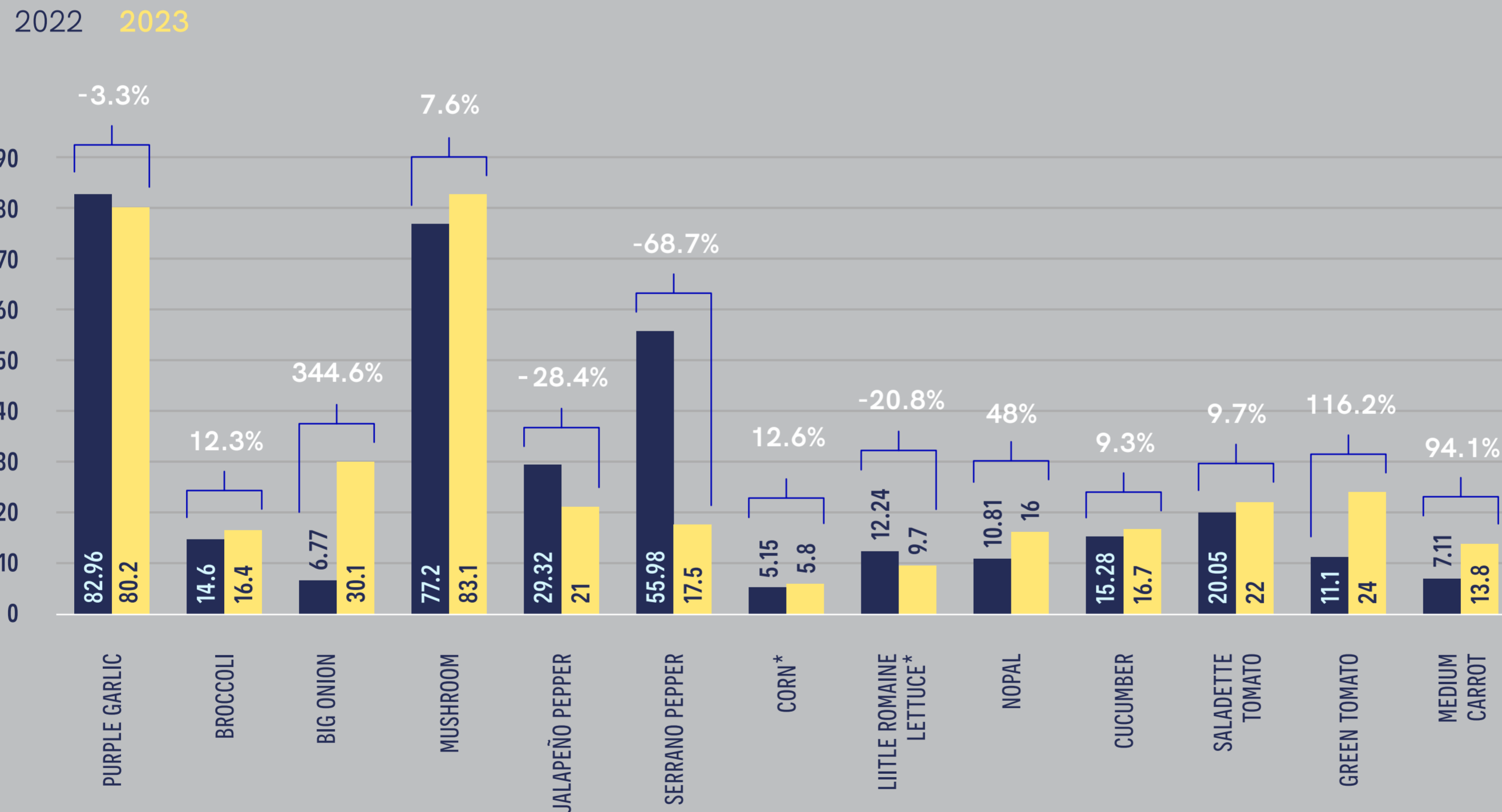
Note: <sup>1</sup>Monthly average of frequent pricing reported from the first business day to the last business day of the month. The average price is in Mexican pesos (\$) per kilogram.





Vegetables mainly showed price increases, with large onions and green tomatoes reporting the largest increases, while serrano peppers showed the largest decrease.

Price<sup>1</sup> of wholesale vegetables at the Querétaro Food Market (December 2022-2023)



Source: Prepared by the authors with data from the Ministry of Economy (National Information and Market Integration System).  
Note: <sup>1</sup> Monthly average of frequent pricing reported from the first business day to the last business day of the month. The average price is in pesos (\$) per kilogram.  
\* The average price is in pesos (\$) per piece.





## 4.3

# Livestock

## 4.3.1

## Livestock production

The also known as the livestock subsector represents an important part of the primary sector in the state. Several municipalities are key to strengthening production and, thus, making Querétaro stand out nationwide.



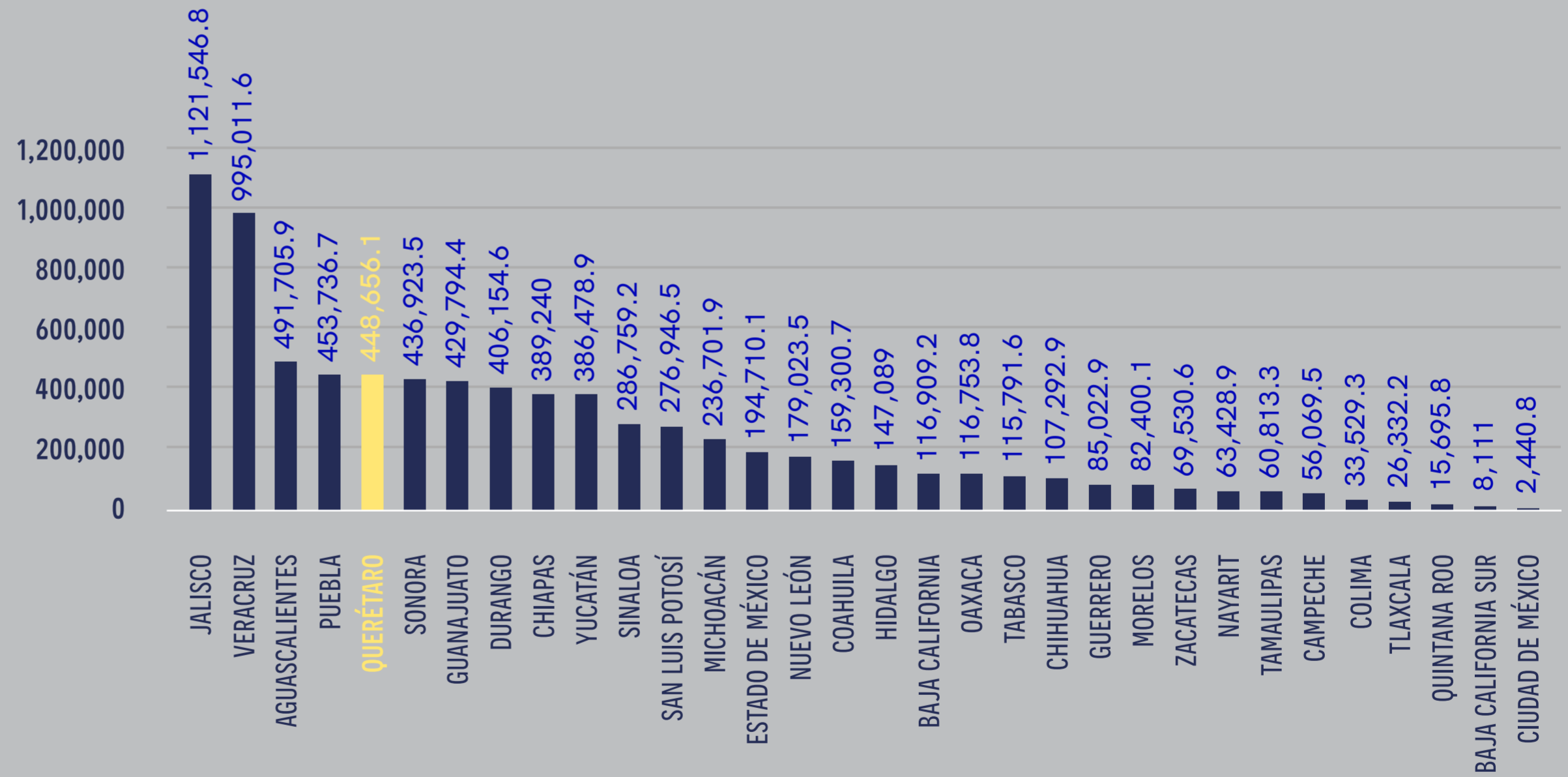


### Production volume

During 2023, national production of meat carcasses totaled 7,999,901.2 tons, a figure that maintained an annual variation of 2.4%. Querétaro was the fifth largest producer, accounting for 5.6% of total production.



### Meat carcass production by state (2023)



Source: Prepared by the authors with data from the Agri-food and Fisheries Information Service, 2024.  
Note: Figures are expressed in tons.



The volume of carcass meat production in Querétaro amounted to 448,656.1 tons, 1.3% higher than that reported in 2022. Poultry accounted for 85.2% of the total.

### Volume of carcass meat production by species in Querétaro (2022-2023)

SPECIES	PRODUCTION VOLUME		VAR. %	DISTRIBUTION
	2022	2023		
Poultry	377,921.8	382,439.4	1.2%	85.2%
Bovine	36,393	37,175.8	2.2%	8.3%
Pork	27,448.5	27,676.5	0.8%	6.2%
Sheep	1,093	1,111.9	1.7%	0.2%
Goat	173.6	176.8	1.9%	0.04%
Turkey	74.6	75.7	1.4%	0.02%
<b>Total</b>	<b>443,104.5</b>	<b>448,656.1</b>	<b>1.3%</b>	<b>100%</b>

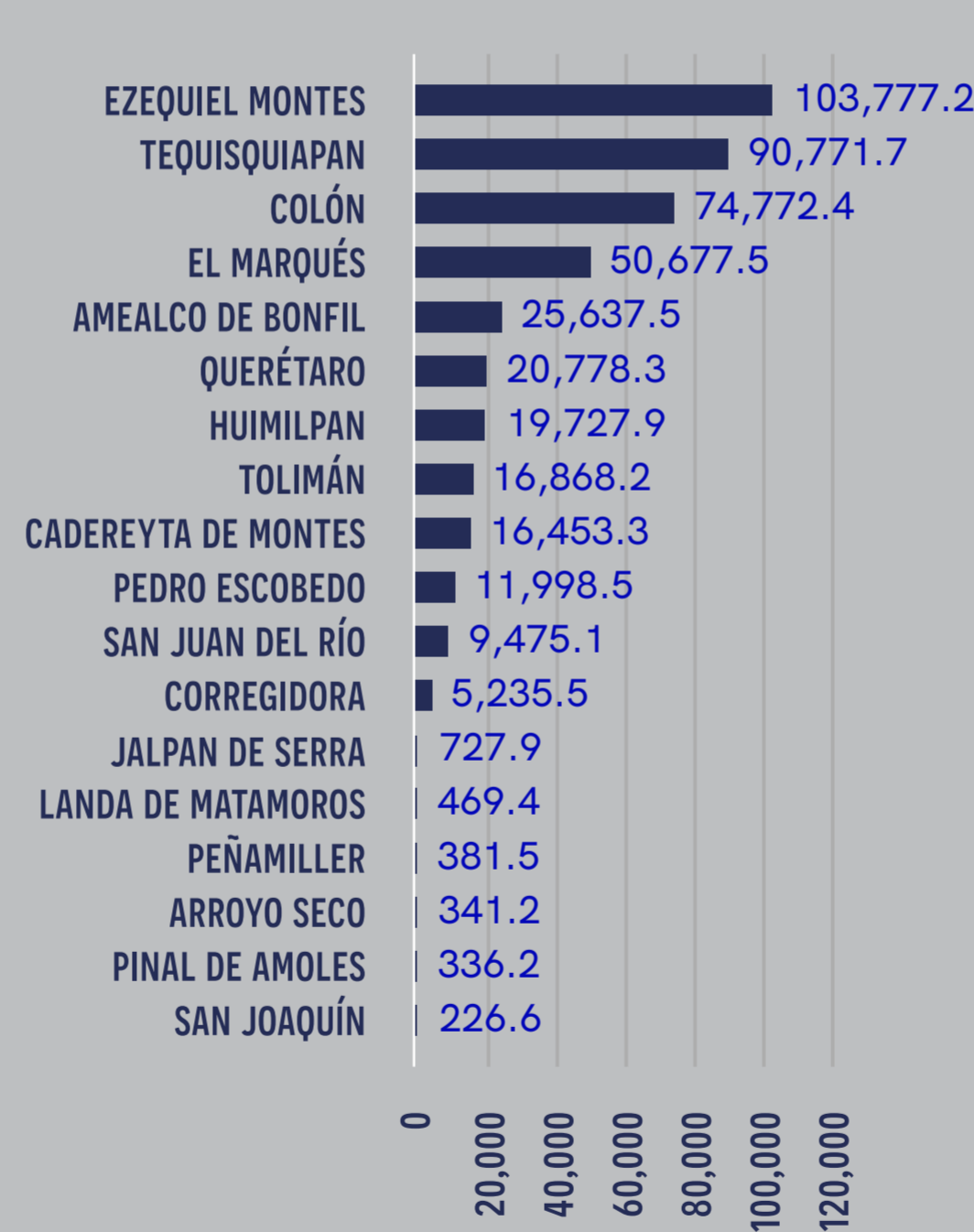
Source: Prepared by the authors with data from the Agri-food and Fisheries Information Service, 2024.

Note: Figures are expressed in tons.

Due to the rounding of the figures, the partial figures may or may not coincide with the total.

The municipality with the highest production volume was Ezequiel Montes, accounting for 23.1% of total state production, followed by Tequisquiapan with 20.2% and Colón with 16.7%.

### Volume of carcass meat production by species by municipality (2023)



Source: Prepared by the authors with data from the Agri-food and Fisheries Information Service, 2024.

Note: Figures are expressed in tons.

Livestock production also includes products such as milk, eggs, honey and wax. In Querétaro, milk production had high levels, producing a total of 422,770.5 thousand liters in 2022, with bovine milk being the largest producer, a figure that maintained an annual variation of 1.7%.

### Production volume of other livestock products (2023)

PRODUCT	PRODUCTION VOLUME		VAR. %
	2021	2022	
Milk*	415,633.7	422,770.5	1.7%
Bovine*	412,749.6	419,821.7	1.7%
Goat*	2,884.1	2,948.7	2.2%
Egg for plate	19,518.3	19,701.0	0.9%
Honey	57.5	42.9	-25.3%
Wax	1.8	1.3	-26%

Source: Prepared by the authors with data from the Agri-food and Fisheries Information Service, 2024.

Note: Figures are expressed in tons.

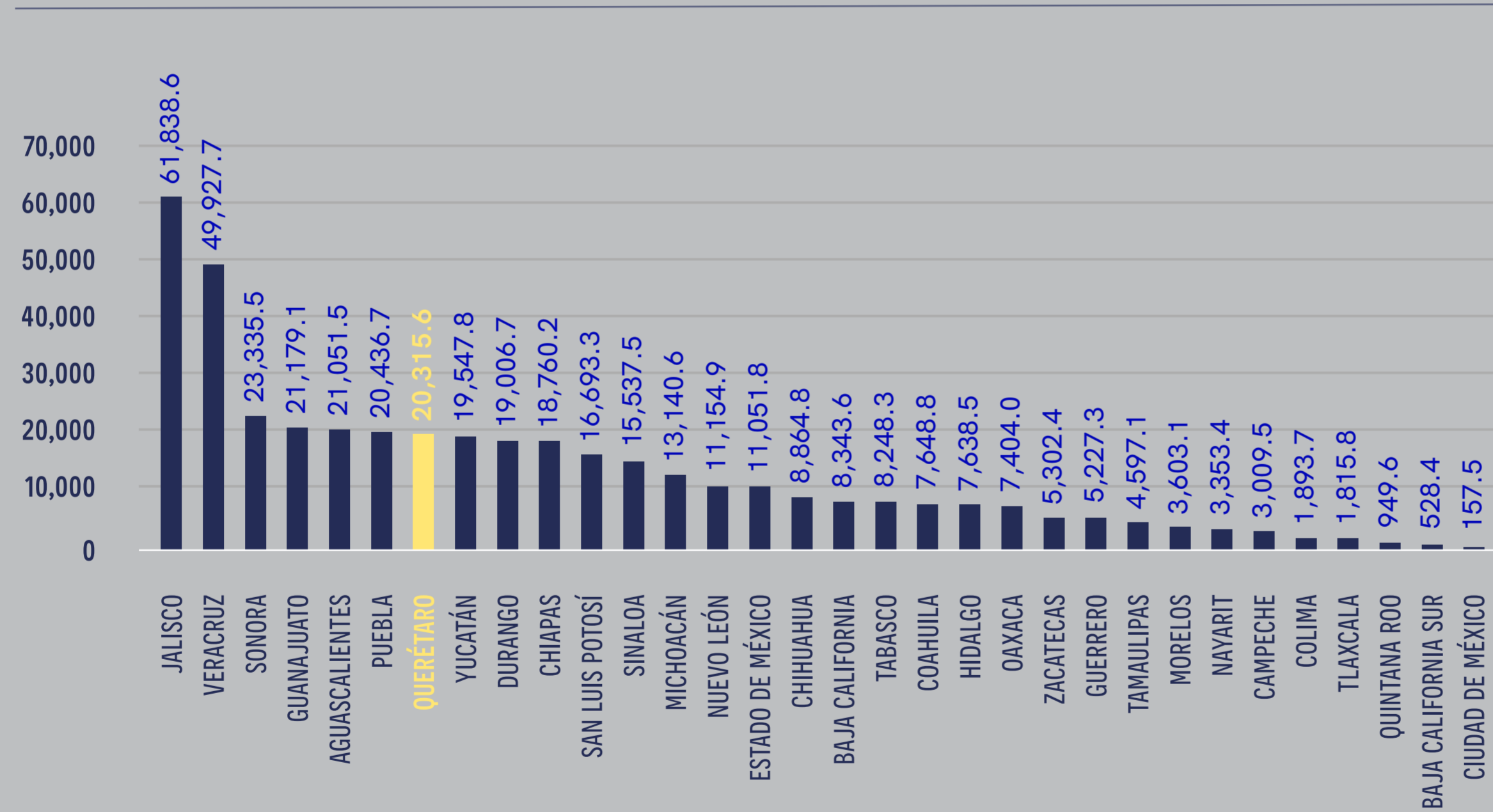
\* Figures are expressed in thousands of liters.







Meat carcass value production by state (2023)



Source: Prepared by the authors with data from the Agri-food and Fisheries Information Service, 2024.  
Note: Figures are expressed in millions of pesos.



### Production values

During 2023, the value of carcass meat production nationwide was recorded at 421,563.3 million pesos, a figure that maintained an annual variation of 5%. Querétaro was the 7th largest producer, accounting for 4.8% of the national total.



The value of carcass meat production in Querétaro amounted to 20,315.6 million pesos, 5.8% higher than the figure reported in 2022. Poultry accounted for 77% of the total.

### Volume of meat carcass production by species in Querétaro (2022-2023)

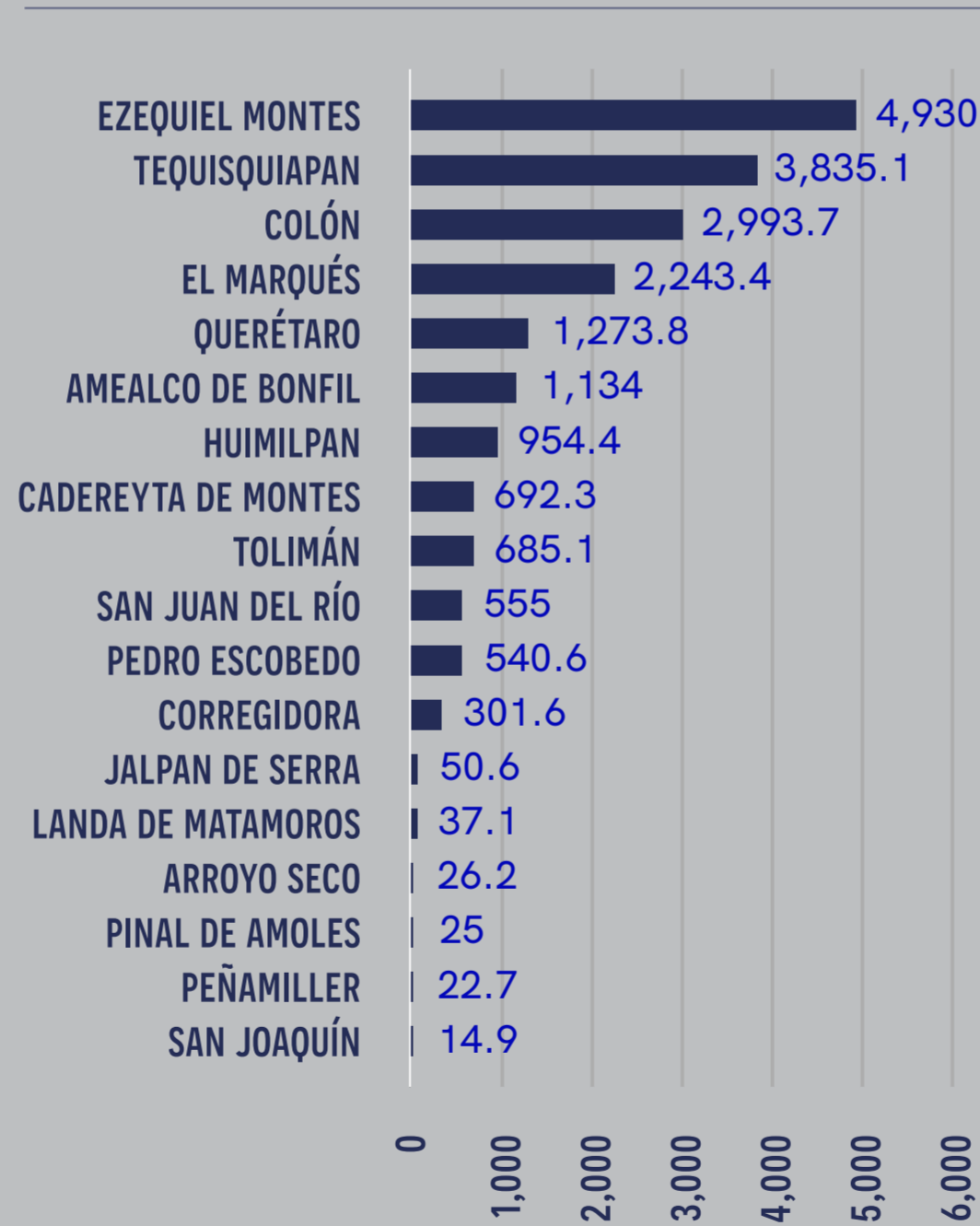
SPECIES	PRODUCTION VALUES		VAR. %	DISTRIBUTION
	2021	2022		
Poultry	14,768.3	15,633.5	5.9%	77%
Bovine	2,904.0	3,063	5.5%	15.1%
Pork	1,402.9	1,487.4	6.0%	7.3%
Sheep	110.1	114.2	3.7%	0.6%
Goat	13.6	14.1	3.6%	0.1%
Turkey	3.5	3.6	3.2%	0.02%
<b>Total</b>	<b>19,202.4</b>	<b>20,315.6</b>	<b>5.8%</b>	<b>100%</b>

Source: Prepared by the authors with data from the Agri-food and Fisheries Information Service, 2024.

Note: Figures are expressed in millions of pesos.

The municipality with the highest production value was Ezequiel Montes, with 24.3% of the total, followed by Tequisquiapan with 18.9% and Colón with 14.7%.

### Carcass meat production value by species by municipality in Querétaro (2023)



Source: Prepared by the authors with data from the Agri-food and Fisheries Information Service, 2024.

Note: Figures are expressed in millions of pesos.

In Querétaro, the value of milk production had high levels, generating a total of 3,654 million pesos in 2022, with cattle being the highest economic generator, with an annual growth of 16.3%.

### Production value of other livestock products (2023)

PRODUCT	PRODUCTION VALUES		VAR. %
	2022	2023	
Milk	3,140.8	3,654	16.3%
Bovine	3,119.6	3,630.1	16.4%
Goat	21	23.9	12.8%
Egg for plate	510.1	569.5	11.6%
Honey	2.8	2.1	-25.3%
Wax	0.1	0.1	-31.2%

Source: Prepared by the authors with data from the Agri-food and Fisheries Information Service, 2024.

Note: Figures are expressed in millions of pesos.





## Livestock inventory

### Cattle inventory in Querétaro (2022-2023)

SPECIES-PRODUCT	INVENTORY BY NUMBER OF HEADS OR BEEHIVES		
	2021	2022 <sub>p</sub>	Var. %
Bee <sup>1</sup>	4,054	4,010	-1.1%
Poultry for meat	42,324,233	42,356,185	0.1%
Poultry for egg plate	1,676,237	1,567,163	-6.5%
Beef cattle	233,658	237,656	1.7%
Dairy cattle	117,530	118,322	0.7%
Goat	88,848	88,921	0.1%
Turkey	21,028	21,153	0.6%
Sheep	149,441	150,035	0.4%
Pork	354,428	355,284	0.2%

Source: Prepared by the authors with data from the Agri-food and Fisheries Information Service, 2024.

Note: <sup>1</sup> In the bee species, the inventory is reported in hives.

p Preliminary figures.

As of the cut-off date and review of the information, there was no update for the year 2023.

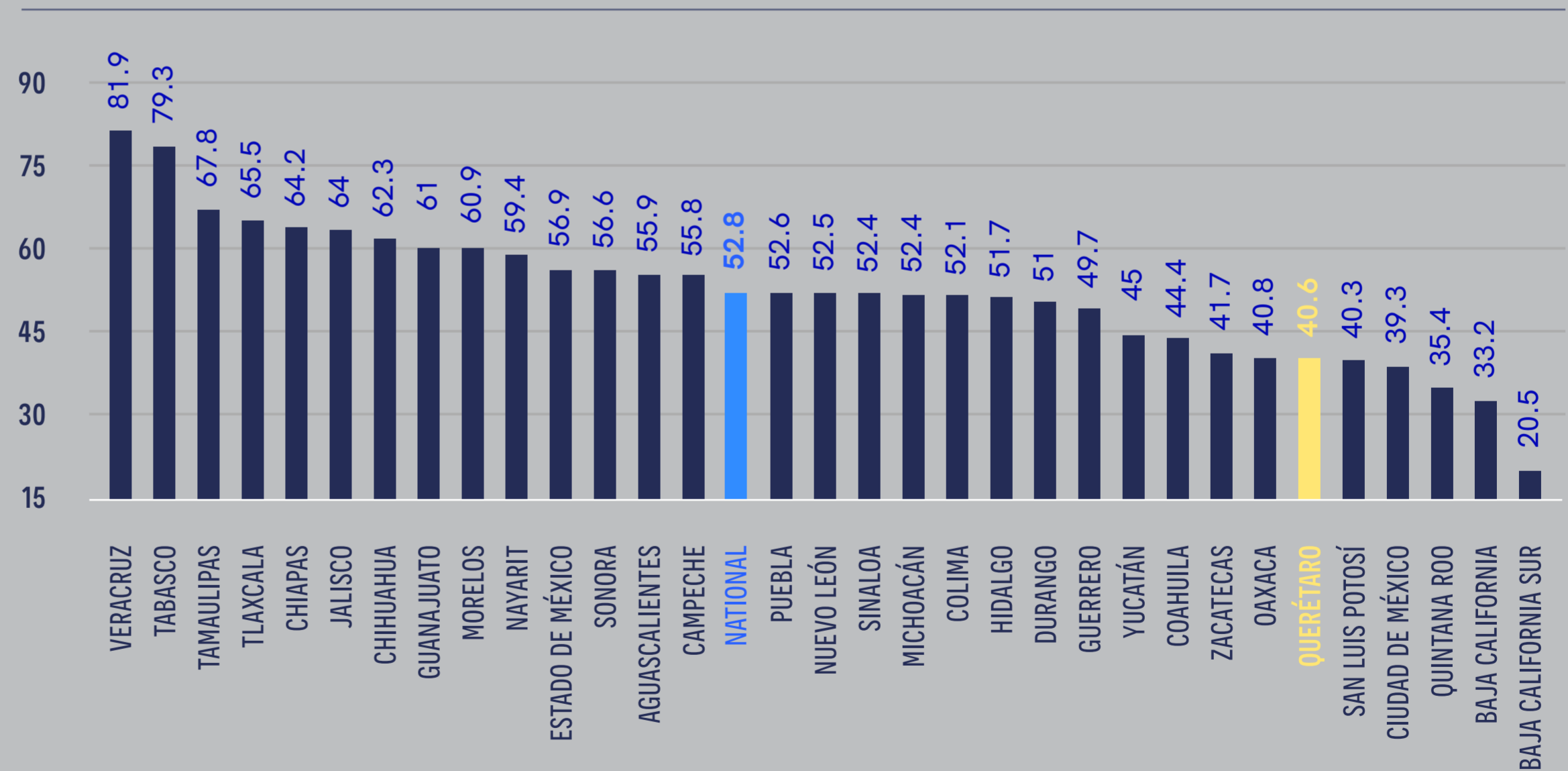




4.4

# Agricultural Census 2022

Area under agricultural use or vocation and forestry use with respect to total area by state (2022)



## Surface

In 2022, according to the Agricultural Census of the National Institute of Statistics and Geography, 103,590,781.3 hectares of land were used for agriculture and forestry. Querétaro accounted for 0.5% of these hectares, or 475,155 hectares.

Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Agricultural Census 2022), 2024.



At the state level, of the total rural area (1,109,340.9 hectares), 36.8% (408,388) was agricultural land, 6% (66,767) was forested land and 57.2% (634,185.9) was land without agricultural use or vocation and without forestry.

### Distribution of the surface area in the rural area by municipality (2022)

MUNICIPALITY	WITH AGRICULTURAL USE OR VOCATION	WITH FOREST HARVESTING	AREA NOT IN AGRICULTURAL OR FORESTRY USE OR VOCATION
Amealco de Bonfil	39,293.6	8,447.6	20,605.5
Pinal de Amoles	22,913.4	4,808.5	43,089.6
Arroyo Seco	16,267	4	56,076.5
Cadereyta de Montes	33,865	9,286	89,091.7
Colón	28,431	9,114.7	41,131
Corregidora	8,487.9	62.3	10,321.8
Ezequiel Montes	15,999.8	0	12,238.2
Huimilpan	18,827.6	1,729.3	17,045.7
Jalpan de Serra	44,377.6	0	73,701.9
Landa de Matamoros	24,598.9	3,784.8	43,438.6
El Marqués	29,835.8	0	38,945
Pedro Escobedo	18,126.7	656.6	11,018.3
Peñamiller	8,081.3	14,389.1	46,586.8
Querétaro	21,138.7	752.8	27,115.9
San Joaquín	4,716.4	12,567.5	10,290.1
San Juan del Río	35,607	330.4	30,896
Tequisquiapan	16,737.8	509.7	16,698.2
Tolimán	21,082.5	323.8	45,895

Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Agricultural Census 2022), 2024.



### Workforce

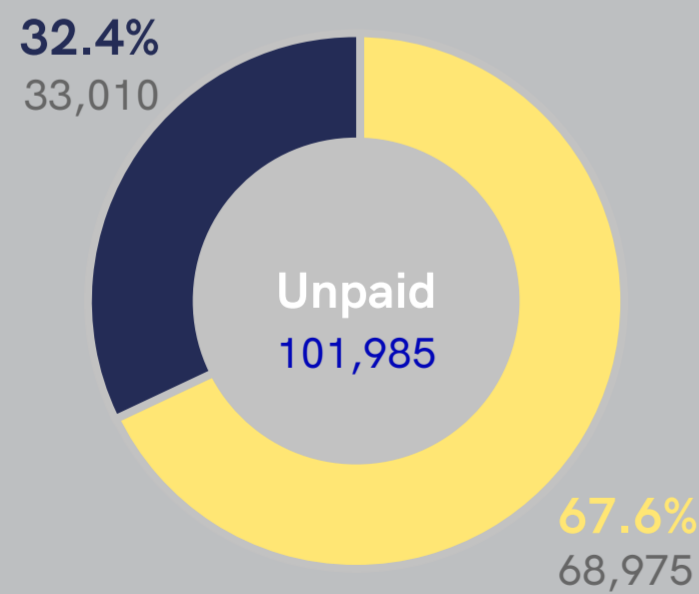
During 2022, 26,984,247 people participated in agricultural activities nationwide. Querétaro accounted for 0.6% of these, or 164,542 people, of whom 29.2% were women and 70.8% men. Of the total in the state, 62% was unpaid labor and 38% was paid.

Regarding the labor force in forestry activities, 92,551 people participated in forestry activities nationwide. In Querétaro the figure was 2,018 people, which represents 2.2% of the national total, 36.1% were women and 63.9% men. Of the total in the state, 3.7% was unpaid labor and 96.3% was paid.

#### Labor force in agricultural activities in Querétaro (2022)

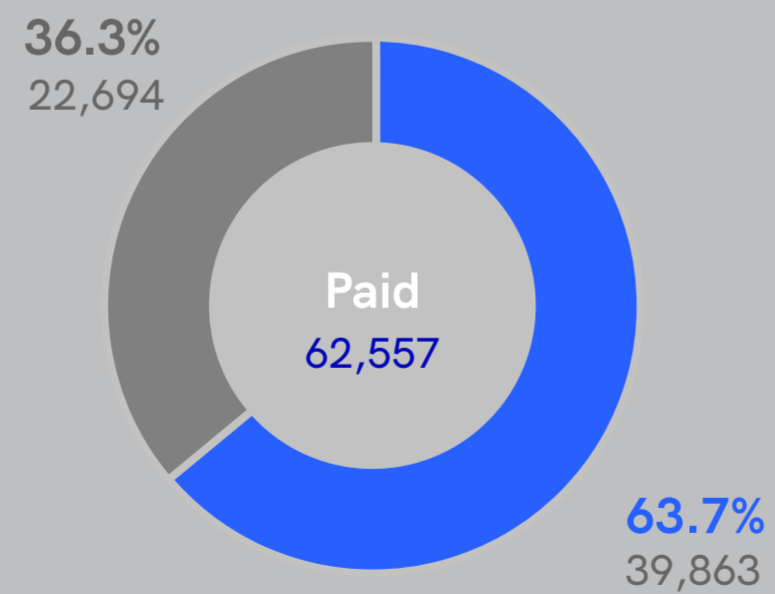
##### Producer family

Producers



##### Production unit dep.<sup>1</sup>

Day laborers

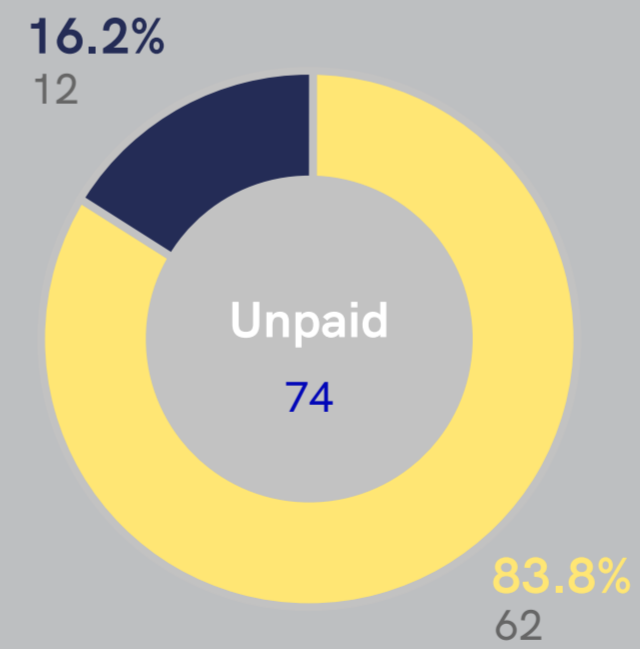


Source: Prepared by the authors with data from the National Institute of Statistics and Geography (National Occupation and Employment Survey), 2024.  
Note: <sup>1</sup> Dependents of the production unit.

#### Labor force in forestry activities in Querétaro (2022)

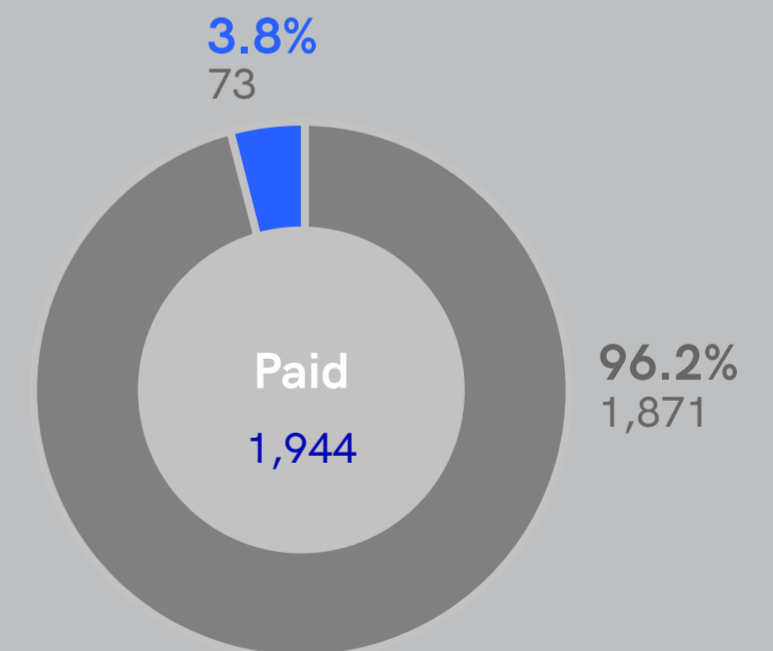
##### Producer family

Producers



##### Production unit dep.<sup>1</sup>

Day laborers



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (National Occupation and Employment Survey), 2024.  
Note: <sup>1</sup> Dependents of the production unit.



4.5

# Aquaculture and fishing



4.5.1

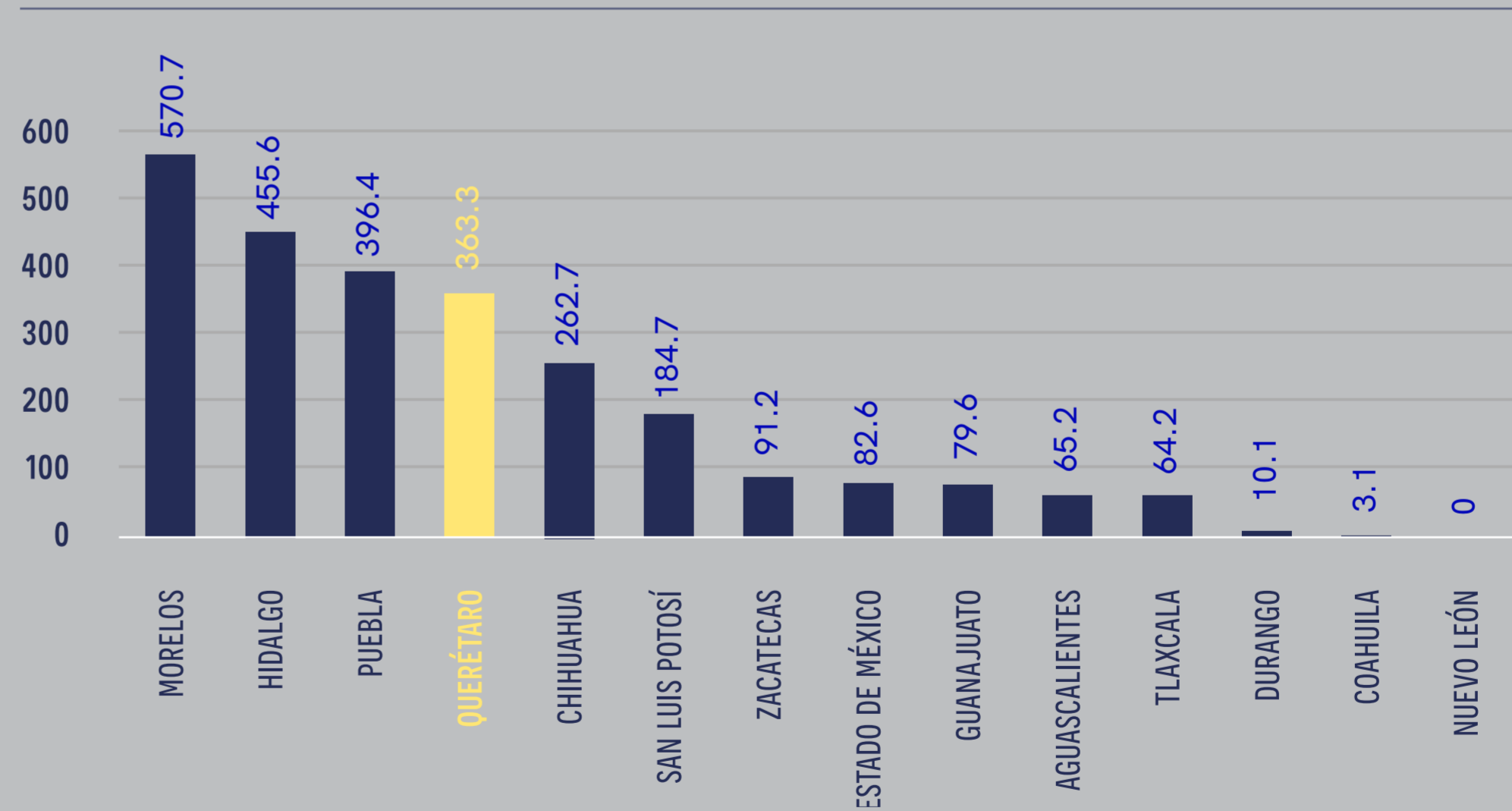
## Aquaculture and fishing production

Due to the nature of its activities and the state's own conditions, it is the division with the lowest contribution to the primary sector's GDP. However, it is present throughout the state, mainly in the production of species such as catfish, carp, tilapia and trout.

### Production volume

During 2022, at the national level, it amounted to 1,989,789.5 tons, a figure that maintains an annual variation of 3.2%. Querétaro accounted for 0.02% of the total and ranked 4th among the landlocked states with the highest production.

Production volume of landlocked states (2022)



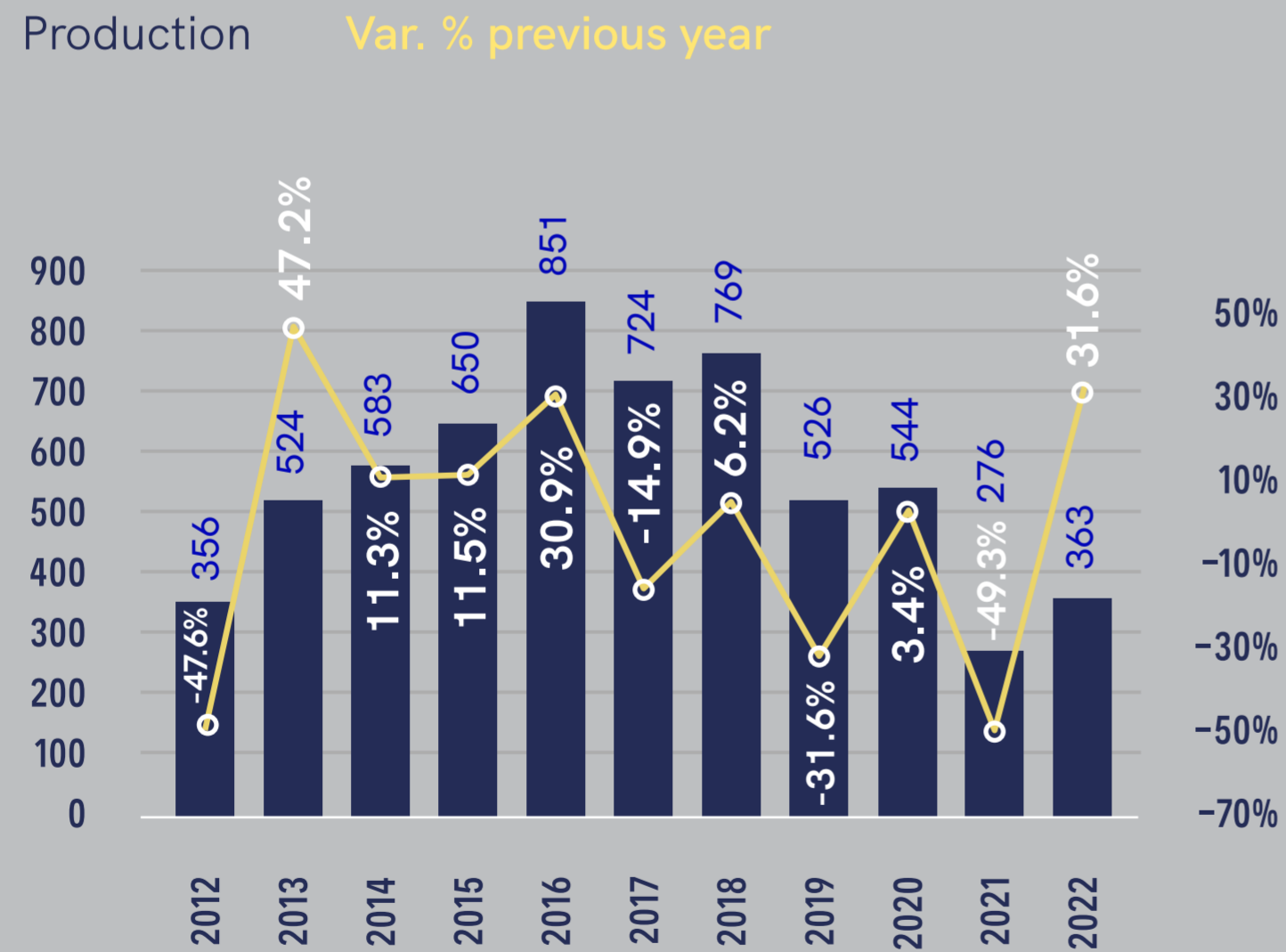
Source: Prepared by the authors with data from the National Commission of Aquaculture and Fisheries (2021 Economic Yearbook), 2024.  
Note: The unit of measurement is live weight in tons.



In the state, the fishing activity produced a total of 363.3 tons, an amount that presented an increase of 31.6% with respect to the year 2021.

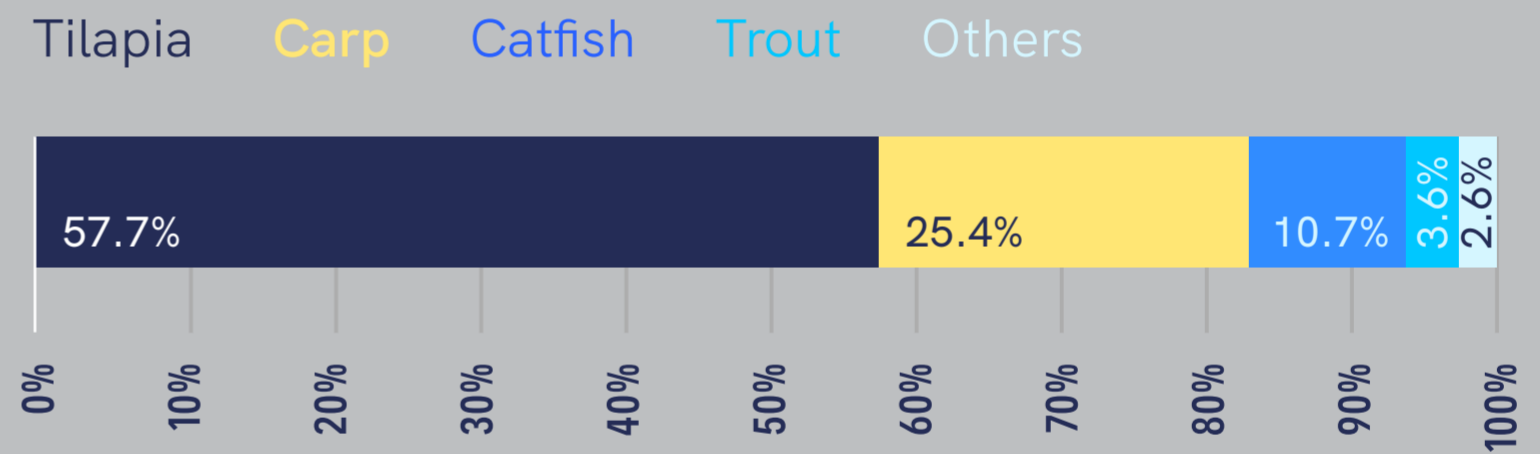
Tilapia was the species with the highest production, with 209.6 tons, followed by carp with 92.5 tons, catfish with 38.7 tons and trout with 12.9 tons. The remaining species totaled 9.6 tons.

Fishery production in Querétaro (2012-2022)



Source: Prepared by the authors with data from the National Commission of Aquaculture and Fisheries (Fish production by fish office 2022), 2024.  
Note: The unit of measurement is live weight in tons.

Distribution of production volume by species in Querétaro (2022)



Source: Prepared by the authors with data from the National Commission of Aquaculture and Fisheries (Fish production by fish office 2022), 2024.  
Note: "Others" considers the production of black sea bass and bullfrog.

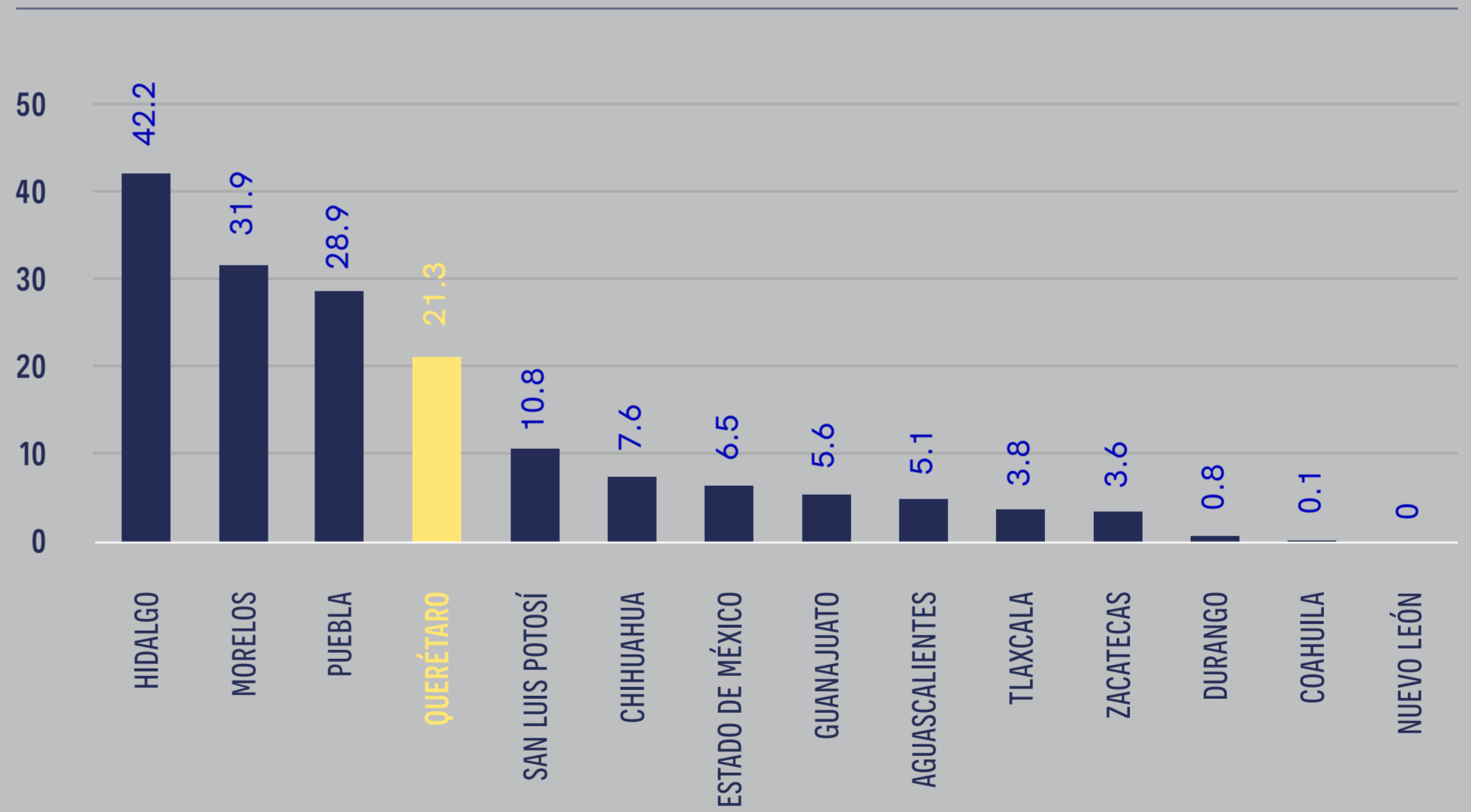




### Production values

For 2022, the national value amounted to MXN \$48,892.4 MM, a figure that maintains an annual variation of 3.6%. Querétaro accounted for 0.04% of the total and ranked 4th among the landlocked states with higher production.

### Production value of landlocked states (2022)



Source: Prepared by the authors with data from the National Commission of Aquaculture and Fisheries (2021 Economic Yearbook), 2024.

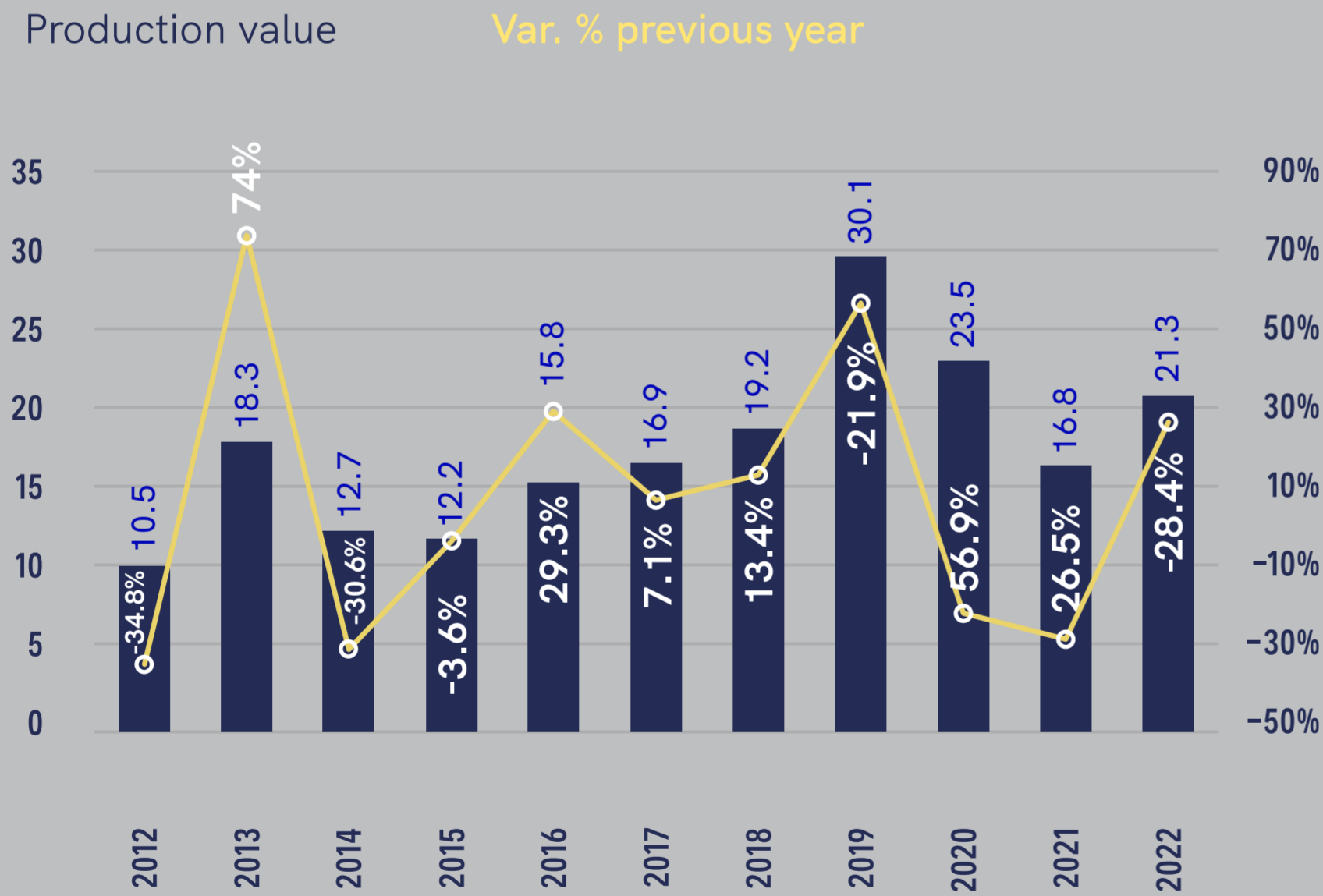
Note: Figures are expressed in millions of pesos.



In Querétaro, fishing activities in 2022 reached MXN \$21.3 MM, an increase of 26.5% with respect to 2021.

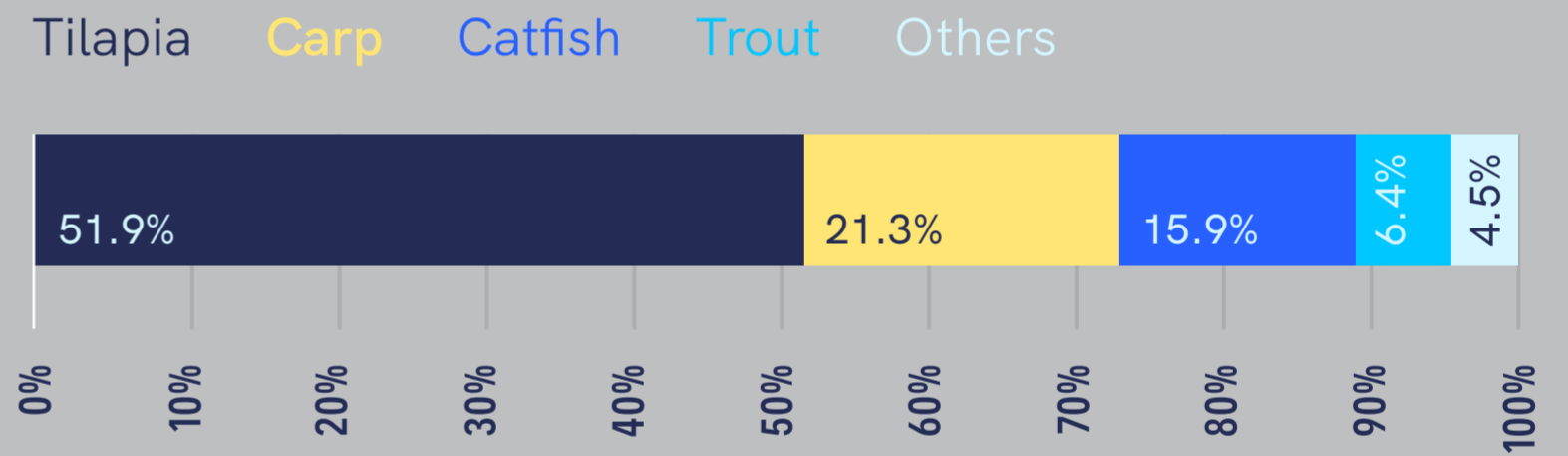
The tilapia was the species that contributed the most to production value, with MXN \$11.1 MM, followed by carp with MXN \$4.5 MM, catfish with MXN \$3.4 MM and trout with MXN \$1.4 MM ton. The remaining species totaled MXN \$1 MM.

Fishery production value in Querétaro (2012-2022)



Source: Prepared by the authors with data from the National Commission of Aquaculture and Fisheries (Fish production by fish office 2022), 2024.  
Note: Figures are expressed in millions of pesos.

Distribution of production value by species in Querétaro (2022)



Source: Prepared by the authors with data from the National Commission of Aquaculture and Fisheries (Fish production by fish office 2022), 2024.  
Note: "Others" considers the value of black sea bass and bullfrog.



### 4.5.2

## Aquaculture and fishing resources

Querétaro, as a landlock state, develops its fishing activity in the main water reservoirs of its 18 municipalities.

### Fishing companies

According to the Statistical Yearbook of Aquaculture and Fishing, in its 2021 edition, Querétaro is home to 157 companies dedicated to fishing activities in different sectors, of which 47.2% are dedicated to aquaculture.

### Registered fishing companies by type of activity in Querétaro (2021)

CAPTURE	AQUACULTURE <sup>1</sup>	INDUSTRIALIZATION	CAPTURE-AQUACULTURE	MARKETING	TOTAL
18	71	1	0	67	157

Source: Prepared by the Ministry of Agricultural Development with data from the National Commission of Aquaculture and Fisheries (2021 Aquaculture and Fisheries Statistical Yearbook), 2024.

Note: <sup>1</sup>Economic units registered in the National Aquaculture and Fishing Registry (RNP).

As of the cut-off date and review of the information, there was no update for the year 2022.

### Population, vessels, plants and production units in the fishing sector in Querétaro (2021)

Employed population	Capture and aquacultural fisheries	759
	Controlled systems	277
	<b>Totals</b>	<b>1,036</b>
Registered vessels	Deep sea fishing <sup>1</sup>	0
	River fishin <sup>2</sup>	253
Fishing plants		1
Agriculture production units		113

Source: Prepared by the authors from the National Commission of Aquaculture and Fisheries (2021 Aquaculture and Fisheries Statistical Yearbook), 2024.

Note: <sup>1</sup> Active vessels in the national fishing and aquaculture registry.

<sup>2</sup> Vessels with a length less than or equal to 10 meters and whose main activity is commercial fishing.

As of the cut-off date and review of the information, there was no update for the year 2022.



759

POPULATION OF FISHERMEN



0

ACTIVE LARGER VESSELS



1

FISHING PLANTS



253

ACTIVE RIVERINE VESSELS



110

AQUACULTURE PRODUCTION UNITS



## 4.6

# Forestry

## 4.6.1

## Forest production

The use of forest resources contributes to boosting local economies and generates sources of employment, which is why it is of utmost importance that it be carried out in a legal, orderly and sustainable manner.

Uncontrolled exploitation, fires, pests and forest diseases are risk factors that must be avoided in order to achieve prosperity for the people who make a living from these activities in the medium and long term.



## Productive diversity

It is divided in two groups:

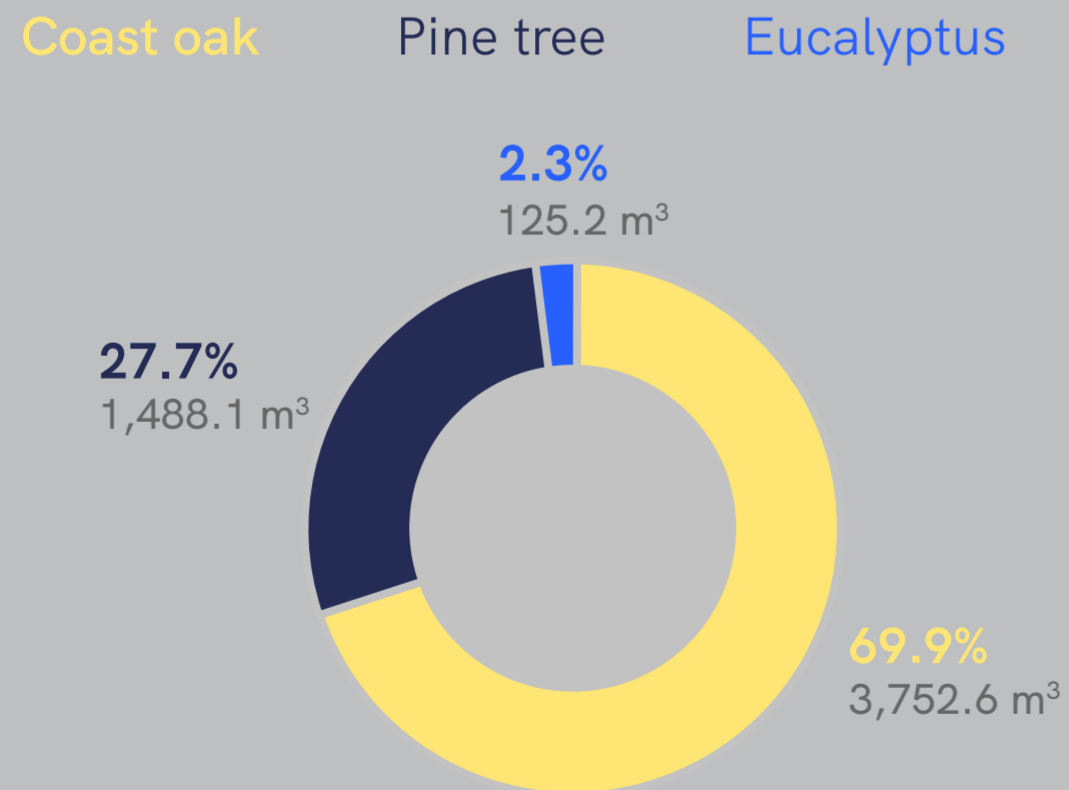
- ▶ **Timber:** It generates roundwood in long and short dimensions, firewood, charcoal, among others, mainly of the genera (Pinus) pine and (Quercus) coast oak or valley oak.
- ▶ **Non-timber:** It produces leaves of aromatic plants of the semi-desert, dominated by Mexican oregano (*Lippia graveolens*) and damiana (*Turnera diffusa*).



## Timber production volume

The Ministry of Environment and Natural Resources (SEMARNAT, by its acronym in Spanish) reported that during 2023 timber production in Querétaro was 5,366 m<sup>3</sup> logs, 69.9% of which was coast oak.

### Distribution of timber production in Querétaro (2023)



Source: Prepared by the authors with information from the Ministry of Environment and Natural Resources (SEMARNAT), 2024.

In terms of product groups, of the total production, 69% is destined for sawmilling, such as long and short roundwood, 23% for firewood, 6% for coast oak charcoal and the rest for posts and wood burning.

## Non-timber production volume

On the other hand, in 2023, the volume of non-timber production reached only 30.2 tons, 99.9% of which was contributed by Mexican oregano leaf.

## Authorizations and volume of use

During 2023 no timber harvesting authorization was issued, however, a management program was completed, leaving only 11 authorizations in force, with a total of 25,644.1 m<sup>3</sup> of Total Tree Volume (TTV) authorized for 2023, of which 71% corresponds to coast oak and 25% to pine.

In addition, 2 identification codes were granted for the harvesting of non-timber forest resources, reaching 8 properties with 311.3 tons in the state, 52% Mexican oregano, 23% pine nut and 22% damiana.





## 4.7

# Mining

## 4.7.1

## Mineral extraction

At the national level, mining continues to be a relevant sector, as it supplies 70 productive sectors and is a source of income for 696 communities in 212 municipalities. In recent years, the sector has been affected by inflation, the global economic slowdown and policy uncertainty regarding mining.

In 2022, 64.2% of the national mining production value was generated by Guerrero, Tamaulipas, Chiapas, Michoacán and the Estado de México. Querétaro contributed 0.2% of the value, ranking it 24th among the states that contributed the most.





## Mineral diversity

During 2022, Mexico was positioned as one of the most important countries in the mining sector, due to the fact that it had 16 metals and minerals located in the top 10 places in world production.

Mining in Querétaro is focused on metallic minerals such as gold and silver, and non-metallic minerals such as stone aggregates, sands and gravels for construction such as limestone, quarry, kaolin, dimensional rocks and tepetate.

## Production volume

In 2022, in Querétaro, the volume of mining production reached 58,652,254.8 tons, a figure that maintains an annual variation of 1033%, despite the growth, the volume of production of metallic products showed a significant reduction.

### Mining production volume in Querétaro (2021-2022)

PRODUCT	2021	2022	VAR. %
<b>Metallic</b>	<b>3,587.7</b>	<b>2,450</b>	<b>-31.7%</b>
Gold	300	300	0%
Silver	2,800	2,150	-23.2%
Copper	129.6	0	-100%
Lead	0	0	0%
Zinc	358.1	0	-100%
<b>Non-metallic</b>	<b>5,173,325.7</b>	<b>58,649,803.8</b>	<b>1033.7%</b>
<b>Stone aggregates</b>	<b>1,741,186.4</b>	<b>53,724,591.4</b>	<b>2985.5%</b>
Sand <sup>1</sup>	1,139	1,139	0%
Basalt	480,000	480,000	0%
Calcite <sup>2</sup>	400,500	377,110	-5.8%
Limestone	1,840,000	2,873,455	56.2%
Kaolin	135,000	135,000	0%
Gravel	250,000	356,000	42.4%
Semiprecious stones	0.4	0.4	22.2%
Dimensionable rocks <sup>1</sup>	25,500	293,308	1050.2%
Tepetate	300,000	409,200	36.4%

Source: Prepared by the authors with data from the Mexican Geological Survey (2022 Statistic Yearbook of Mexican Mining), 2024.

Note: Figures are expressed in tons.

<sup>1</sup> Mineral for construction. Figures calculated based on cement and lime consumption.

<sup>2</sup> Calcium carbonate.





## Production value

Also for 2022, in Querétaro, the volume of mining production reached 11,156.5 million pesos, a figure that maintains an annual variation of 474.2%.

### Mining production value in Querétaro (2021-2022)

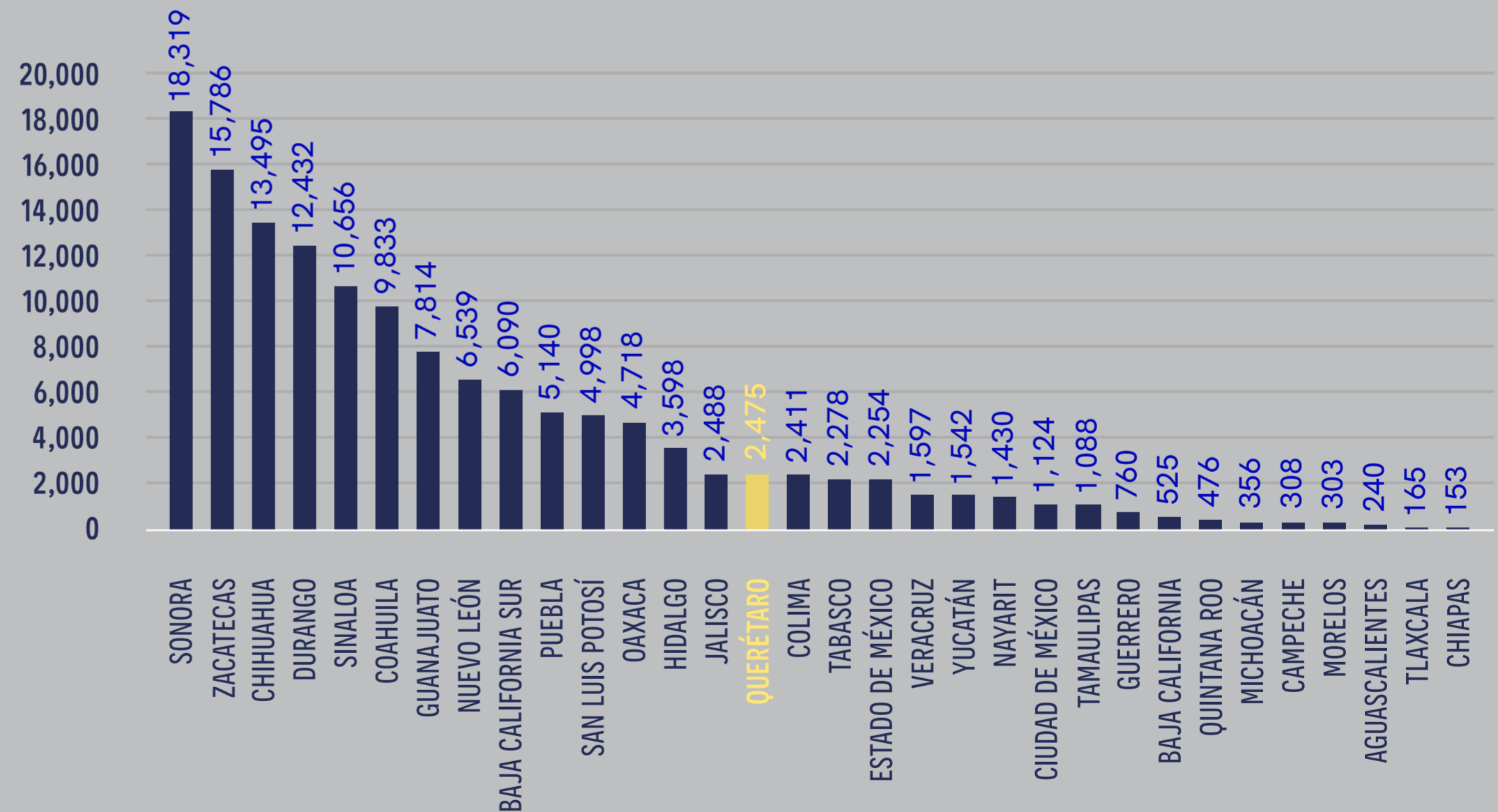
PRODUCT	2021	2022	VAR. %
<b>Metallic</b>	446.8	378.5	-15.3%
Gold	352.3	349.3	-0.9%
Silver	46.1	29.2	-36.6%
Copper	25	0	-100%
Lead	0	0	0%
Zinc	23.3	0	-100%
<b>Non-metallic</b>	1,496.1	10,777.9	620%
Stone aggregates	263.7	8,773.8	3226.8%
Sand	0.1	0.1	7.8%
Basalt	157.2	169.5	7.8%
Calcite	98.8	100.3	1.5%
Limestone	454	764.4	68.4%
Kaolin	441.4	441.3	-0.02%
Gravel	23.8	36.5	53.5%
Dimensionable rocks	37	463	1140.2%
Tepetate	19.7	29	47.1%

Source: Prepared by the authors with data from the Mexican Geological Survey (2022 Statistic Yearbook of Mexican Mining), 2024.  
 Note: Figures are expressed in current millions of pesos.

## Employment

As of the fourth quarter of 2023, employment in the mining sector amounted to 141,391 people nationwide. Querétaro ranked 15th with the highest concentration of jobs in the sector.

### Mining sector jobs by state (4Q 2023)



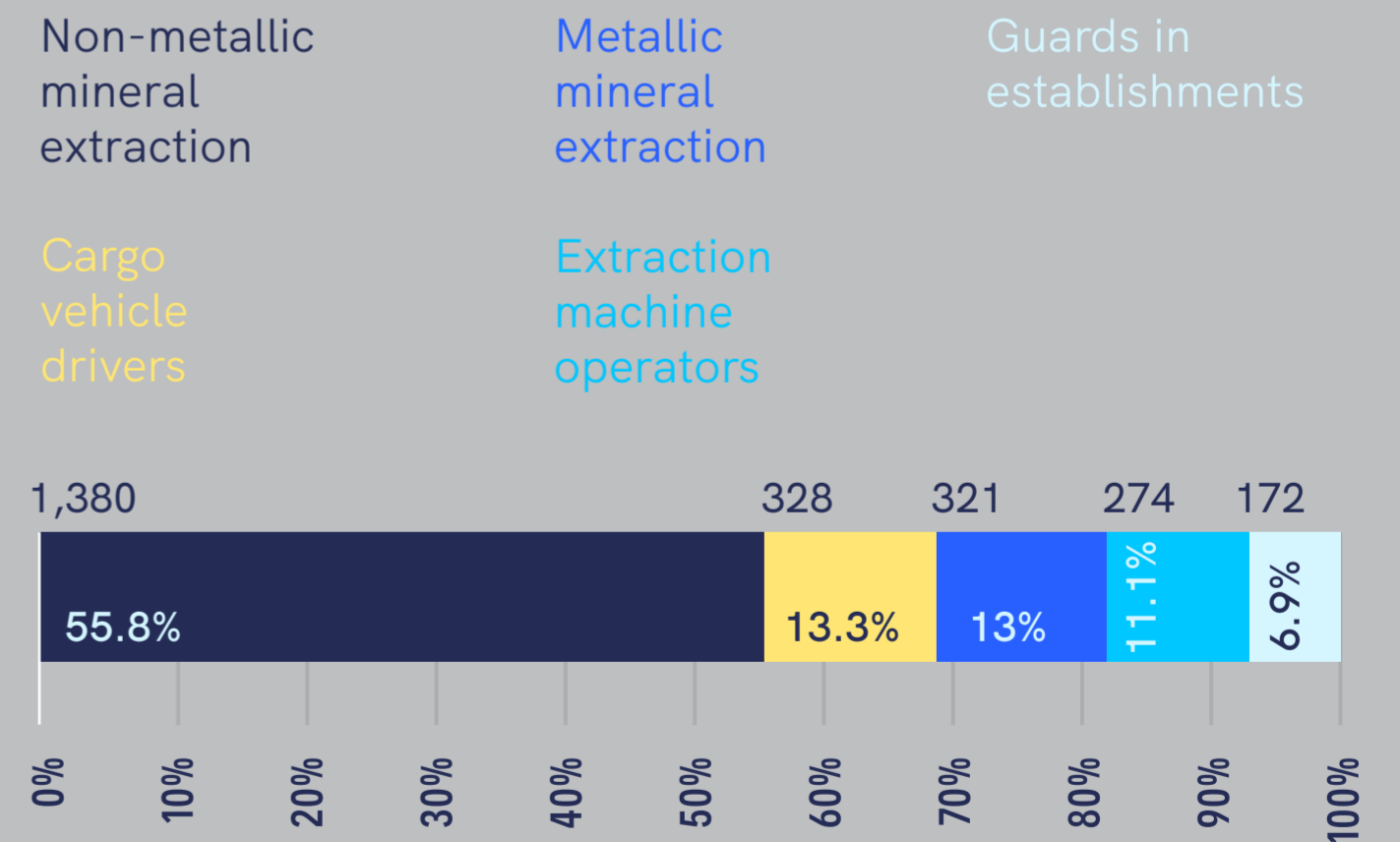
Source: Prepared by the authors with data from the Ministry of Economy (DataMexico), 2024.





At the state level, 2,475 people worked in the sector, more than 50% of them in the extraction of metallic minerals.

### Distribution of jobs by occupation in Queretaro (4Q 2023)



Source: Prepared by the authors with data from the Ministry of Economy (DataMexico), 2024.



## 4.7.2

## Mineral resources

Querétaro closely regulates the exploitation of the products that make up this sector. Due to the limited quantity of these resources, their use must be strictly controlled.

## Mineral regions

Querétaro concentrates seven mining regions, which are grouped according to their type of mineralization.

### Metallic minerals regions in Querétaro (2020)

REGION	ZONE OR DISTRICT	SUBSTANCE	TYPE OF DEPOSIT
I. Pinal de Amoles	1. Ánimas	Gold, silver, lead, zinc, mercury and antimony	Ore mantles, chimneys, skarn zones and veins
	2. Río Blanco		
	3. El Soyatal		
	4. Plazuela		
	5. Bucareli		
	6. Maconí		
II. San Joaquín	7. Santo Entierro	Gold, silver, lead, zinc, copper and antimony	Chimneys, skarn and disseminated ore mantles
	8. San Juan Nepomuceno		
	9. Calabacillas		
III. Bernal	10. San Martín	Gold and silver	Chimneys, veins and ore mantles
	11. San Antonio		
IV. Querétaro	12. San Pedrito	Gold and silver	Veins and massive

Source: Prepared by the authors with data from the Mexican Geological Survey (Mining Overview in Querétaro, 2021 Edition), 2024.

### Non-metallic minerals regions in Querétaro (2020)

REGION	ZONE OR DISTRICT	SUBSTANCE
V. Cadereyta	1. Marbles: Vizarrón	Marbles, calcium carbonate
VI. Bernal	2. Limestones and dimensionable rocks.	Limestones
VII. Colón	3. Opaliferous: Tequisquiapan	Opal, kaolin, ashlar
	4. Kaolin: Ezequiel Montes	
VIII. Querétaro	5. Ornamental materials	Quarries
	6. La cañada	
IX. Amealco	7. Amealco	Dimensionable rocks and ashlar.

Source: Prepared by the authors with data from the Mexican Geological Survey (Mining Overview in Querétaro, 2021 Edition), 2024.



## Main operating mines

### Main non-metallic mineral mines in operation in Querétaro (2020)

MINE	MUNICIPALITY	SUBSTANCE	
Charco Frío	Tolimán	Limestone	
	El Marqués	Stone aggregates	
	Tolimán	Limestone	
	Tequisquiapan	Calcite <sup>1</sup>	
	Tolimán	Limestone	
	Cadereyta de Montes	Calcite <sup>1</sup>	
	Cadereyta de Montes	Calcite <sup>1</sup>	
	Cadereyta de Montes	Calcite <sup>1</sup>	
	Cadereyta de Montes	Limestone	
	Cadereyta de Montes	Calcite <sup>1</sup>	
	N/A	Querétaro	Stone aggregates
		El Marqués	Stone aggregates
		Vizarrón	Calcite <sup>1</sup>
		El Marqués	Stone aggregates
		Pedro Escobedo	Tuff
		Colón	Ashlar
		Colón	Ashlar
		Cadereyta de Montes	Calcite <sup>1</sup>
Vizarrón		Marble	
Vizarrón		Marble	
Vizarrón	Marmolina and flagstone		
Vizarrón	Marble		
San Juan del Río	Opal		

Source: Prepared by the authors with data from the Mexican Geological Survey (Mining Overview in Querétaro, 2021 Edition), 2024.

Note: N/A Not available.

<sup>1</sup> Calcium carbonate.



### Main mines operating metallic minerals in Querétaro (2020)

MINE	MUNICIPALITY	MINERAL
San Martín	Colón	Gold, silver
La Negra		Silver, lead, zinc
San Miguel Antimonio	Cadereyta	Antimony, gold, silver
Soyatal		Antimony, silver

Source: Prepared by the authors with data from the Mexican Geological Survey (Mining Overview in Querétaro, 2021 Edition), 2024.

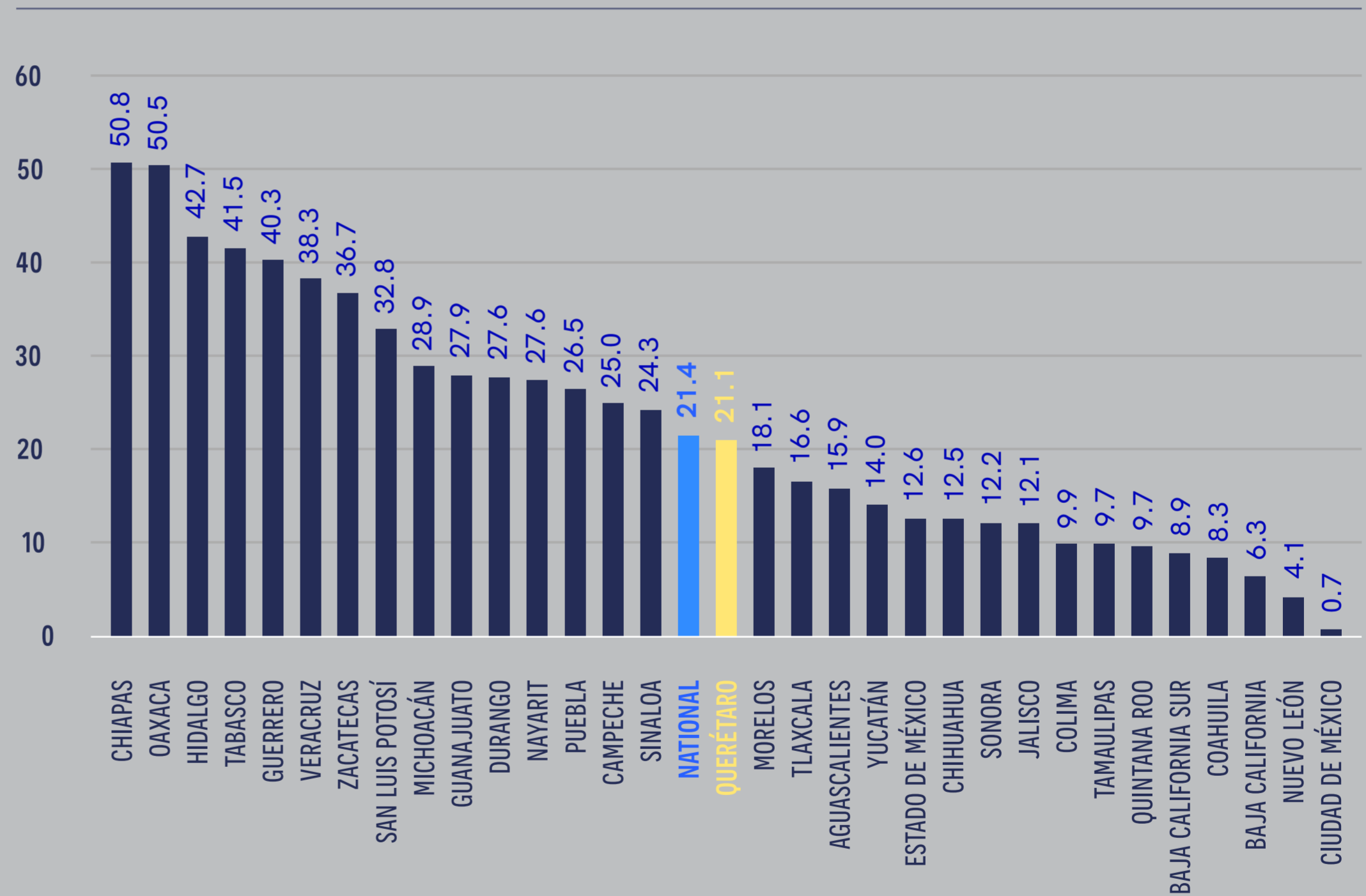


4.8

# Inhabitants of rural areas

According to the National Institute of Statistics and Geography (INEGI, by its acronym in Spanish), a population is considered rural when it has less than 2,500 inhabitants. According to the 2020 Population and Housing Census, nationwide, 21.4% of the population lived in rural areas, that is, 26,983,528 people. Querétaro ranks 16th among the states with the highest proportion of the population in this medium.

Proportion of total population living in rural areas by state (2020)

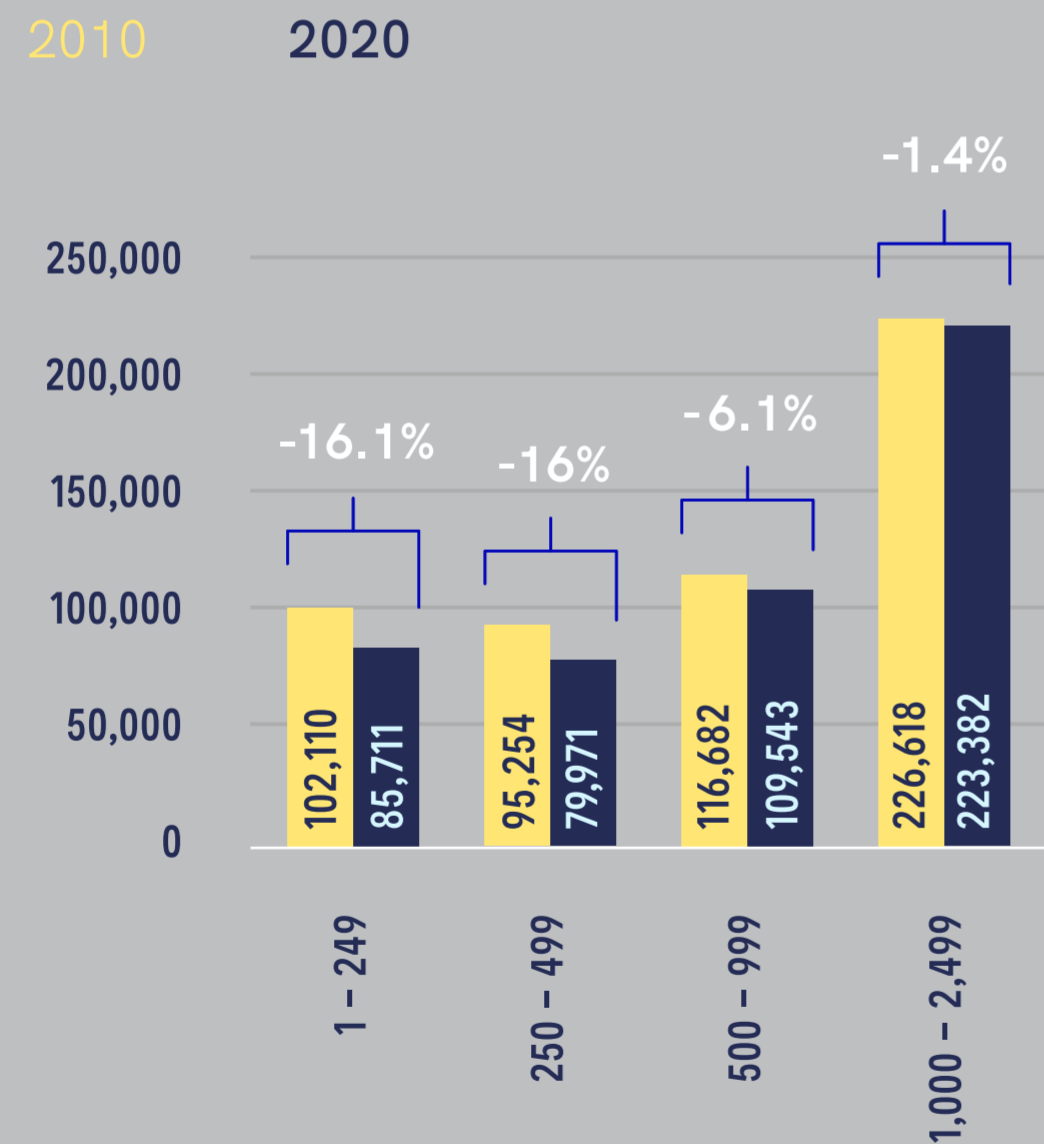


Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Population and Housing Census 2020), 2024.



In Querétaro, the rural population is 498,607 people, or 21.1% of the population. As of the 2010 Population and Housing Census, 29.6% were under this condition.

### Population distribution by size of rural locality in Querétaro (2020)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Population and Housing Census 2020), 2024.

Note: The categories refer to inhabitants Ex. 1-240 inhabitants



Of the total rural population, 44.8% (223,382) lived in towns with 1,000 to 2,499 inhabitants.

Over the years, the rural population has shown significant decreases, while the urban population reported an increase of 45.3% from 2010 to 2020.



## 5

## Secondary Sector

The sector stands out as being of great importance for the state, since it represents 41.8% of the Gross Domestic Product and concentrates 33.6% of the employed population. It integrates economic activities related to mining; construction; generation, transmission and distribution of electricity, water and gas through pipelines to the final consumer; and manufacturing industries.



# 5 Secondary Sector

## 5.1 Economic development

5.1.1 Economic dynamics

## 5.2 Industrial sector

5.2.1 Production structure of the industry

5.2.2 Employment in the secondary sector

5.2.3 Manufacturing companies

5.2.4 Construction industry

## 5.3 Triple helix

5.3.1 Higher Education

5.3.2 Training for work

5.3.3 Research, Science and Technology

5.3.4 Clusters

## 5.4 Industrial parks and zones

## 5.5 Environmental impact

5.5.1 Environmental impact assessment

## 5.6 Regulatory Improvement

## 5.7 Moody's and S&P Credit Ratings

# SECONDARY SECTOR

9<sup>TH</sup>

STATE WITH THE  
HIGHEST GDP  
PER CAPITA

57

RESEARCH  
CENTERS

+ 350

COMPANIES IN THE AUTOMOTIVE  
SECTOR IN THE ENTITY

22.4%

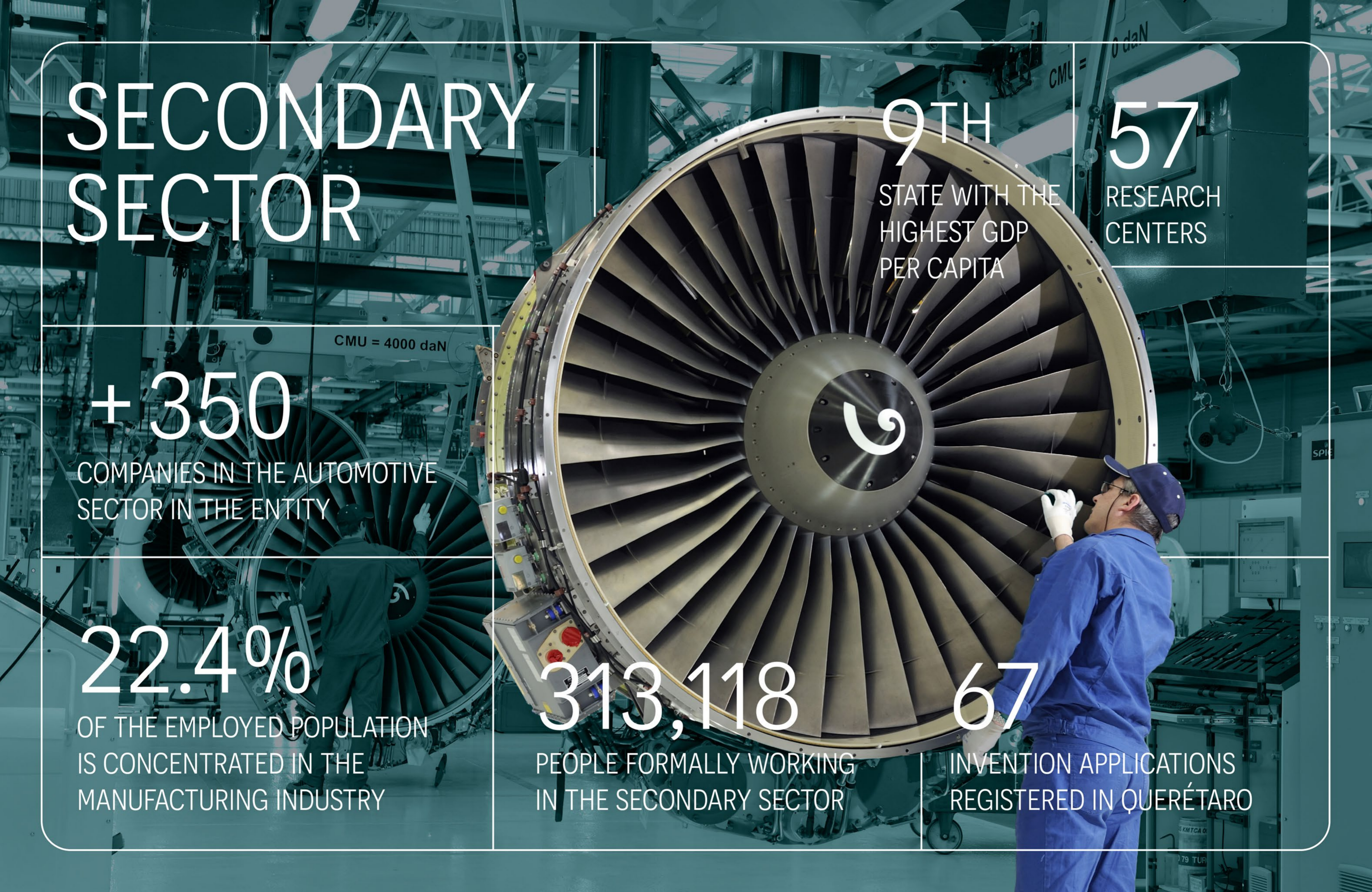
OF THE EMPLOYED POPULATION  
IS CONCENTRATED IN THE  
MANUFACTURING INDUSTRY

313,118

PEOPLE FORMALLY WORKING  
IN THE SECONDARY SECTOR

67

INVENTION APPLICATIONS  
REGISTERED IN QUERÉTARO







5.1

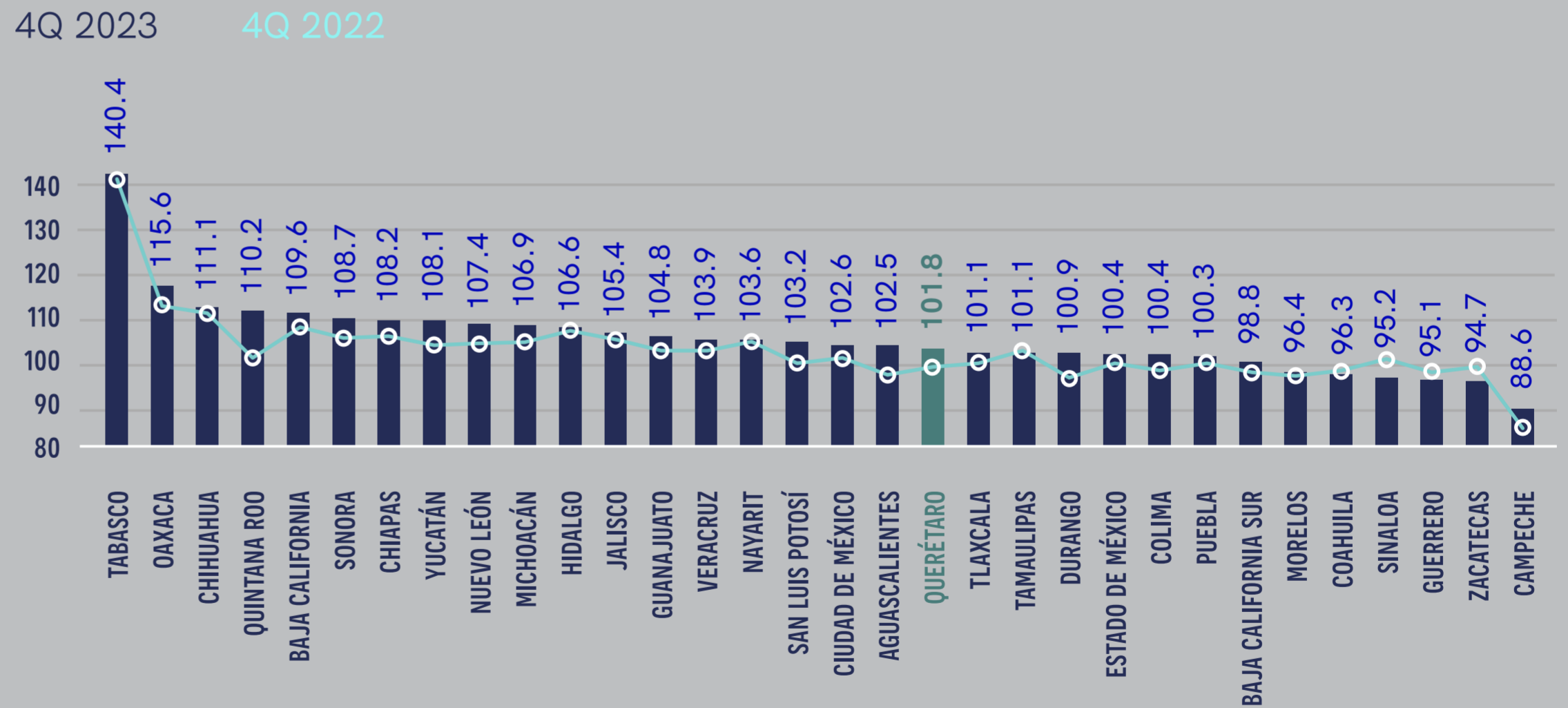
# Economic development

## Quarterly Indicator of State Economic Activity (ITAE, by its acronym in Spanish)

In the fourth quarter of 2023, Querétaro reported an index of 101.8, ranking 19th in terms of the highest value, however, the figure reported

in the state maintained an annual variation of 4%, making it the 9th fastest growing state.

Quarterly Indicator of State Economic Activity by state (4Q 2023)



5.1.1

## Economic dynamics

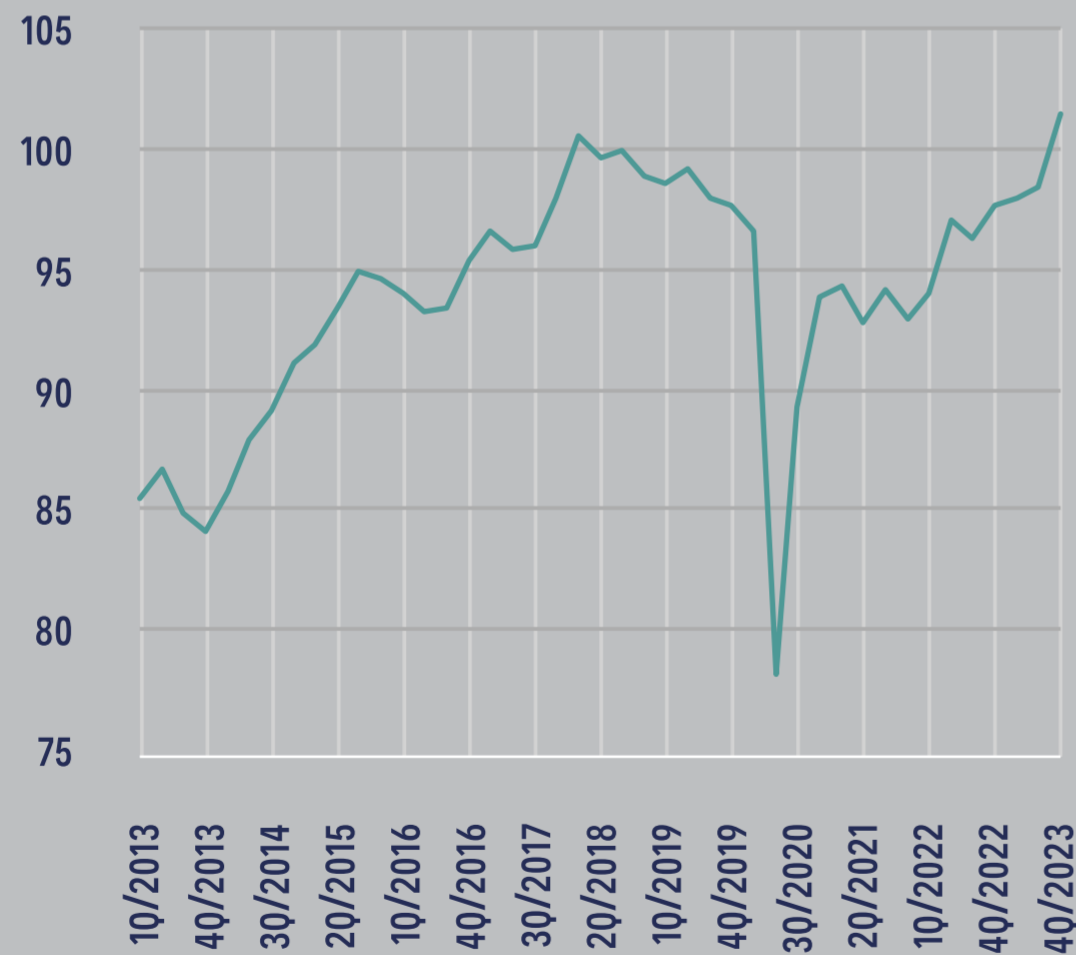
The strengthening of the state economy is one of the main objectives of the current government, which, together with various institutions, companies and citizens, collaborate with actions to raise the economic level, a key element to place the state as one of the most competitive at the national level.

Source: Prepared by the authors with data from the National Institute of Statistics and Geography (ITAE, Base 2018), 2024. Note: The figures used to construct the graph refer to seasonally adjusted series.



The evolution of the Quarterly Indicator of State Economic Activity in Querétaro has maintained fluctuations over time, however, in recent periods it shows a growth trend.

### Evolution of Quarterly Indicator of State Economic Activity (2013-2023)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (ITAE, Base 2018), 2024.  
Note: The figures used to construct the graph refer to seasonally adjusted series.

The annual variations reported in the state during 2023 were: first quarter, 4.2%; second quarter, 1.4%; third quarter, 4.4%; fourth quarter, 4%.

### ITAE Statistics in Querétaro (2023)

QUARTER	ITAE	MONTHLY VARIATION	YEARLY VARIATION
First	98.2	0.3%	4.2%
Second	98.7	0.5%	1.4%
Third	100.8	2.2%	4.4%
Fourth	101.8	0.9%	4%

Source: Prepared by the authors with data from the National Institute of Statistics and Geography (ITAE, Base 2018), 2024.  
Note: The figures used to construct the graph refer to seasonally adjusted series.

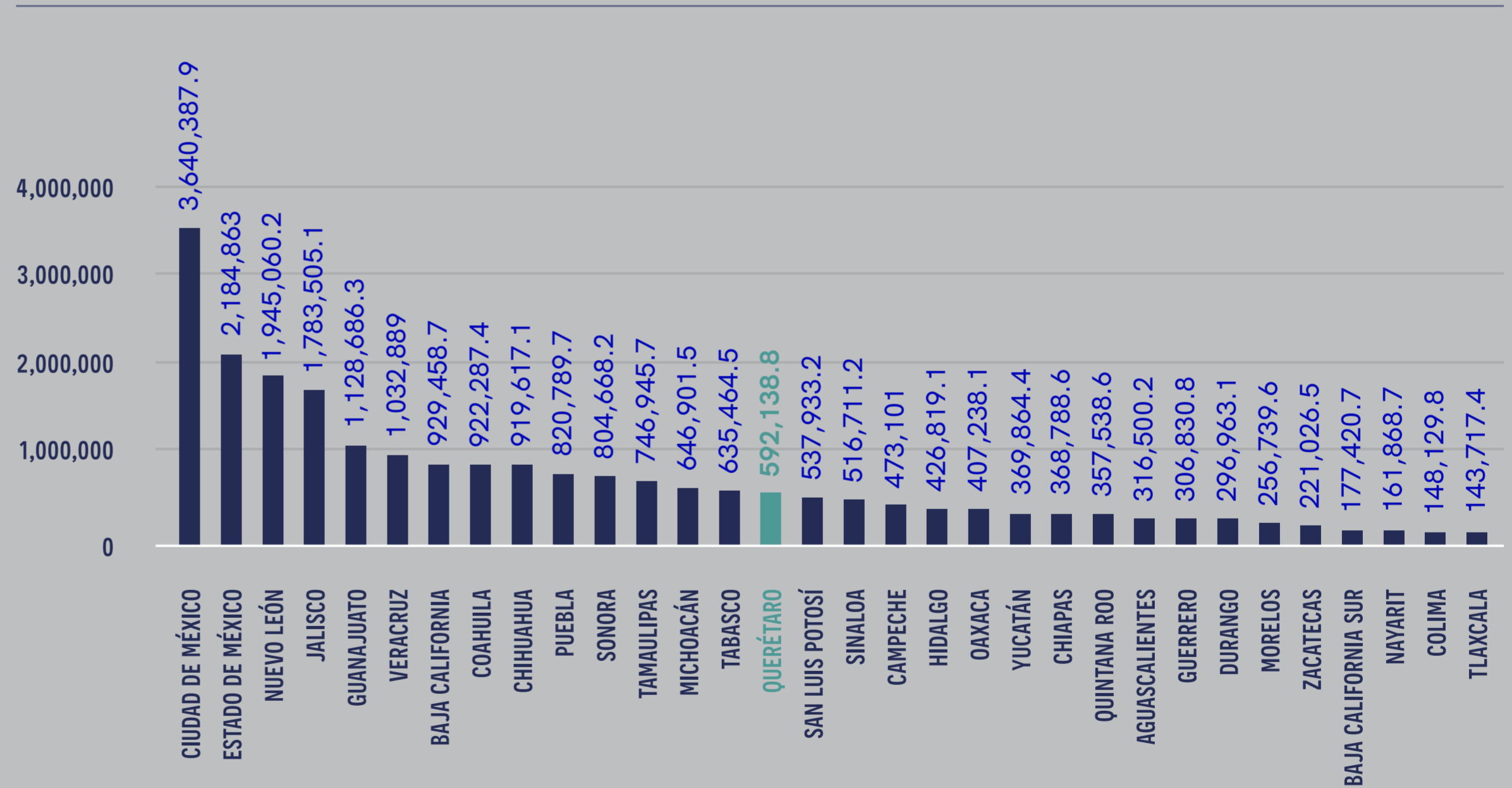




### Gross Domestic Product (GDP)

In 2022, national GDP accounted for MXN \$23,300,708.9 MM at 2018 prices, a figure that maintains an annual variation of 3.9%. Querétaro contributed 2.4% to the national GDP, that is, MXN \$592,138.8 MM; this figure maintains a growth of 3% with respect to 2021.

Gross Domestic Product by state (2022)

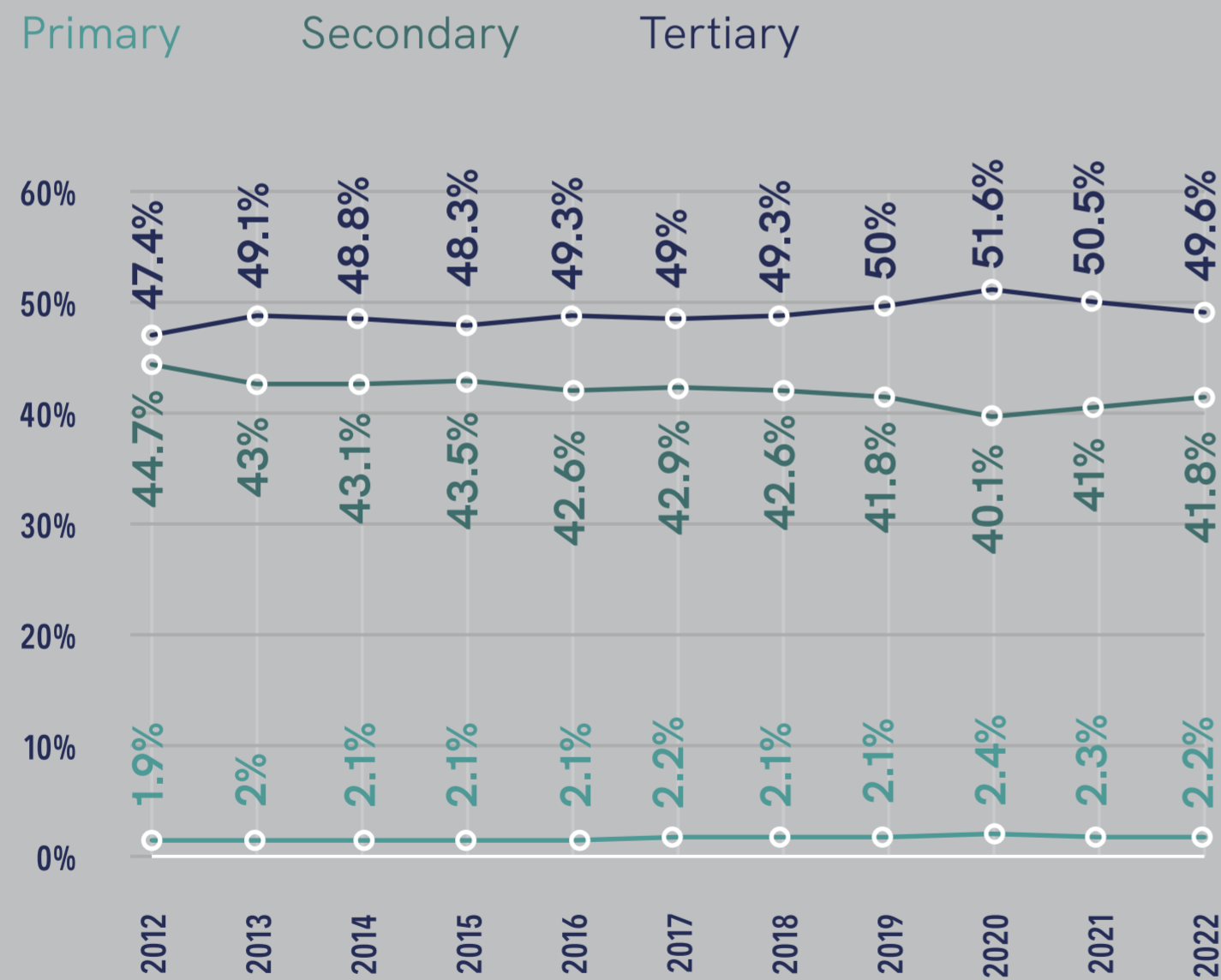


Source: Prepared by the authors with data from the National Institute of Statistics and Geography (GDP by state [PIBE]; 2018 base), 2024.  
Note: Figures are expressed in constant pesos.



With regard to the composition of the state's GDP, secondary and tertiary activity has generated almost all of the value of GDP. In 2022, primary activity presented an annual variation of -0.8%, secondary activity of 5% and tertiary activity of 1.4%.

### Evolution of distribution by economic activity in Querétaro (2021-2022)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (GDP by state [PIBE]; 2018 base), 2024.

Note: The values by activity do not add up to 100%, because the final GDP figure also considers the "Tax on products, net".

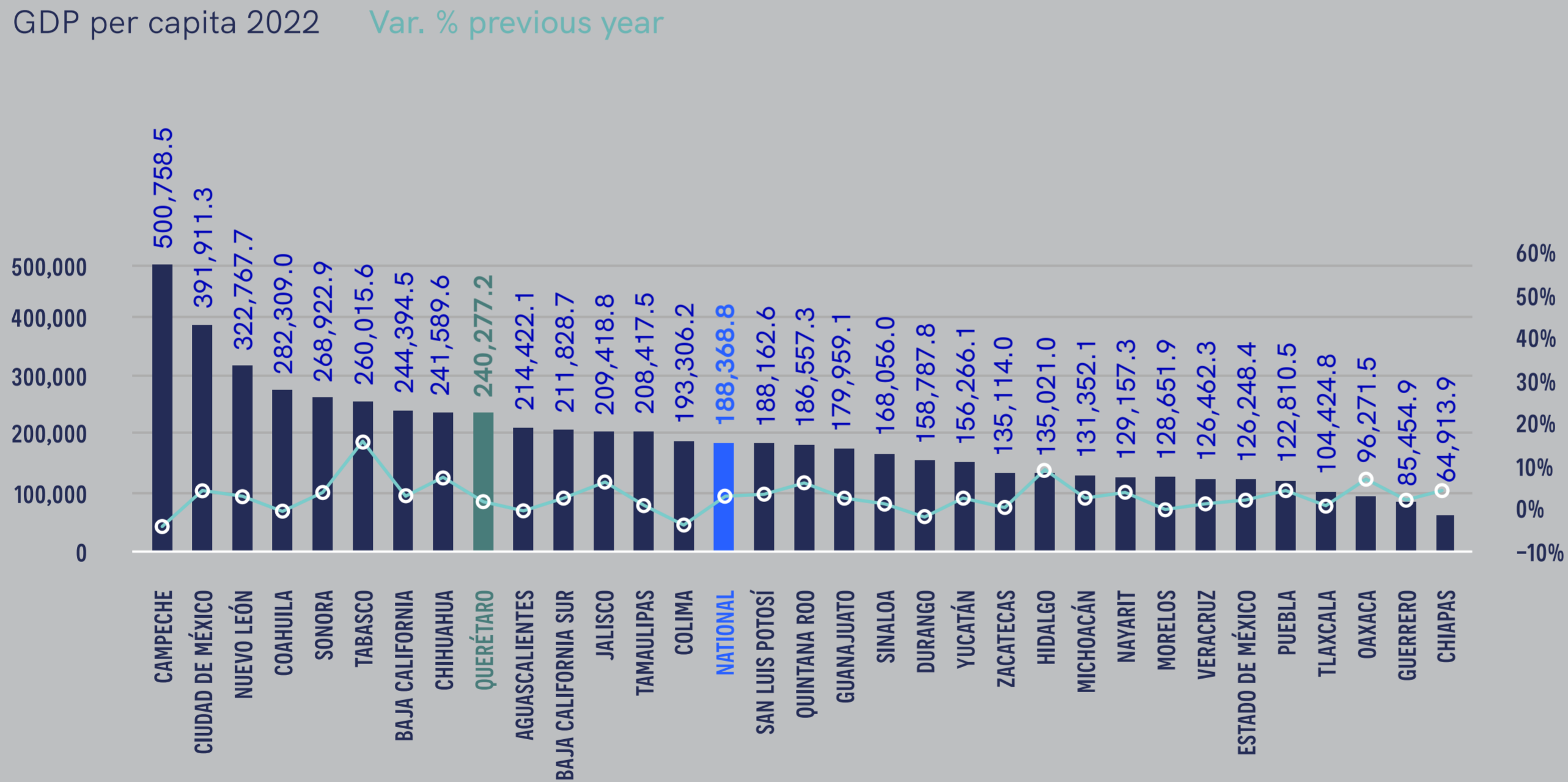




### Gross Domestic Product (GDP) per capita

In 2022, Querétaro’s GDP per capita reached 240,277.2 pesos, a figure that maintains a growth of 1.6% compared to 2021. This value places Querétaro in 9th position among the states with the highest GDP per capita.

#### GDP per capita by state (2022)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (GDP by state [PIBE]; 2018 base; National Occupation and Employment Survey), 2024.

Note: To calculate GDP per capita, the average population registered in the ENOE (by its acronym in Spanish) was considered. Figures are expressed in constant pesos.





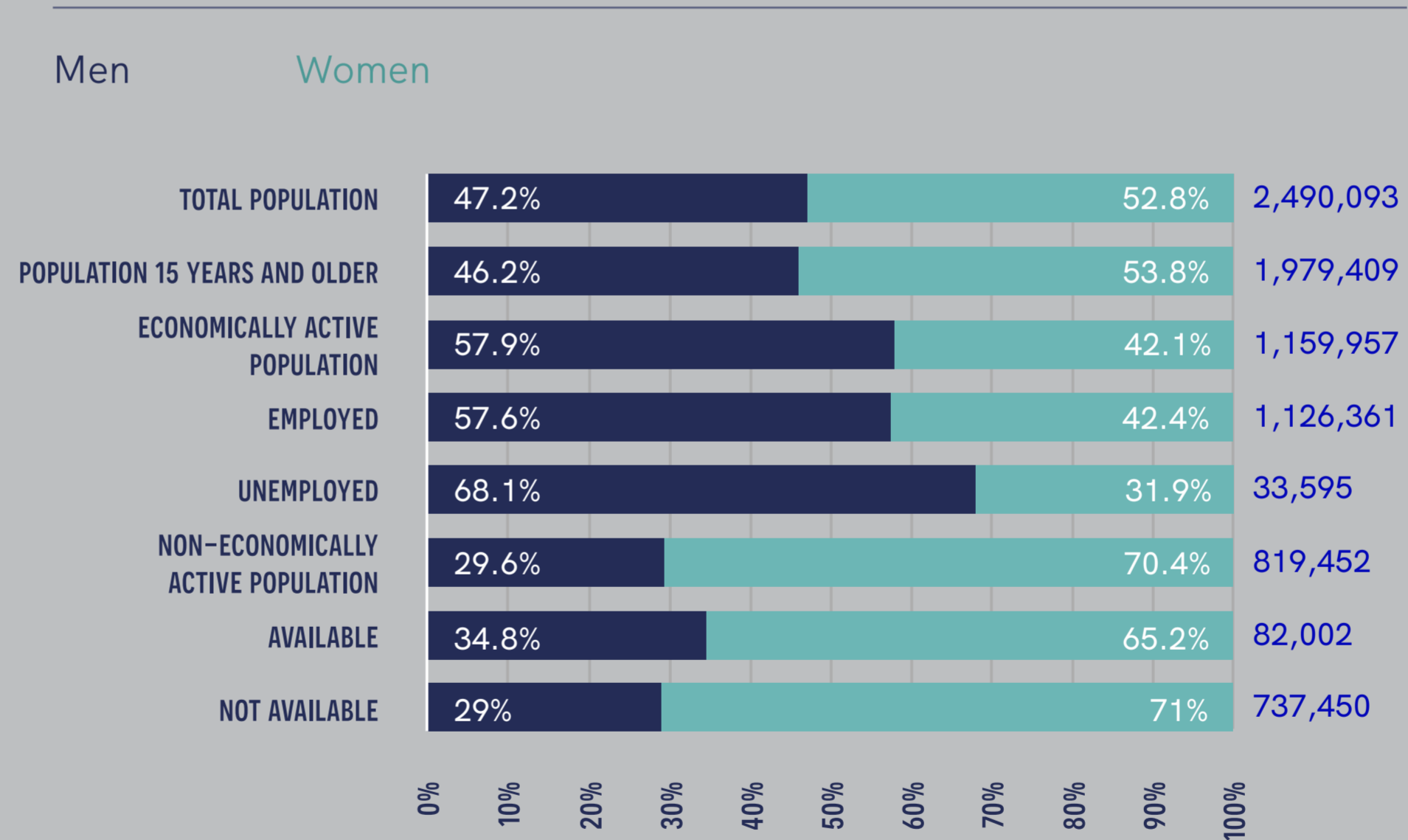
## Economically Active Population (EAP) and Non-Economically Active Population (NEAP)

The EAP represents people aged 15 and over who are either employed (employed population) or looking for a job (unemployed population).

The NEAP refers to the inhabitants who do not have a job and are not looking for one either (unavailable population), however, it also considers the population that, although they are not actively looking for a job, if they were given the opportunity to work they would do so (available population).

According to the National Occupation and Employment Survey (ENOE, by its acronym in Spanish), in Querétaro during 2023, 58.6% (1,159,957) of the population aged 15 and over was part of the EAP, 57.9% being male and 42.1% female. Regarding the NEAP, this represented 41.4% (819,452), of which 29.6% were men and 70.4% women.

### Main indicators of the National Occupation and Employment Survey in Querétaro (2023)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (National Occupation and Employment Survey, 2023), 2024.

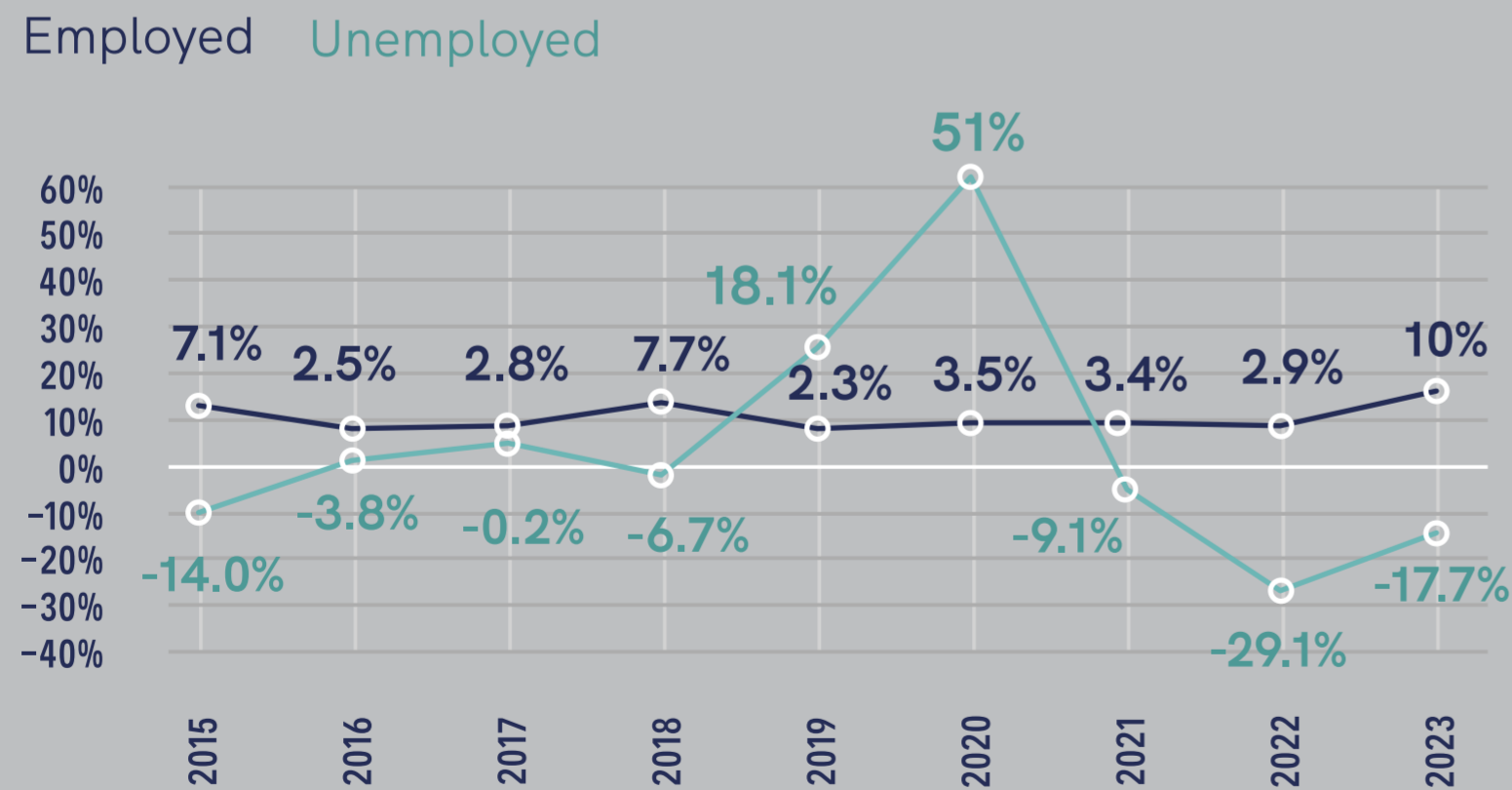
Note: The figures were obtained by averaging the four quarters of each year.

The Economically Active Population considers the "employed" and "unemployed" population; while the Non-Economically Active Population considers the "available" and "unavailable" population.



The employed population represented 97.1% of the EAP, maintaining an annual variation of 10%, while the unemployed represented the remaining 2.9%, with an annual variation of -17.7%.

### Annual changes in the employed and unemployed population in Querétaro (2015-2023)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (National Occupation and Employment Survey, 2023), 2024.  
Note: The figures were obtained by averaging the four quarters of each year.

In Querétaro, between 2022 and 2023, a total of 94,896 persons entered the employed population, while 7,231 exited the unemployed.

The NEAP reported a total of 819,452 persons, a figure that maintains an annual variation of -5.5%, 90% of which was made up of the unavailable population and 10% of the available population.

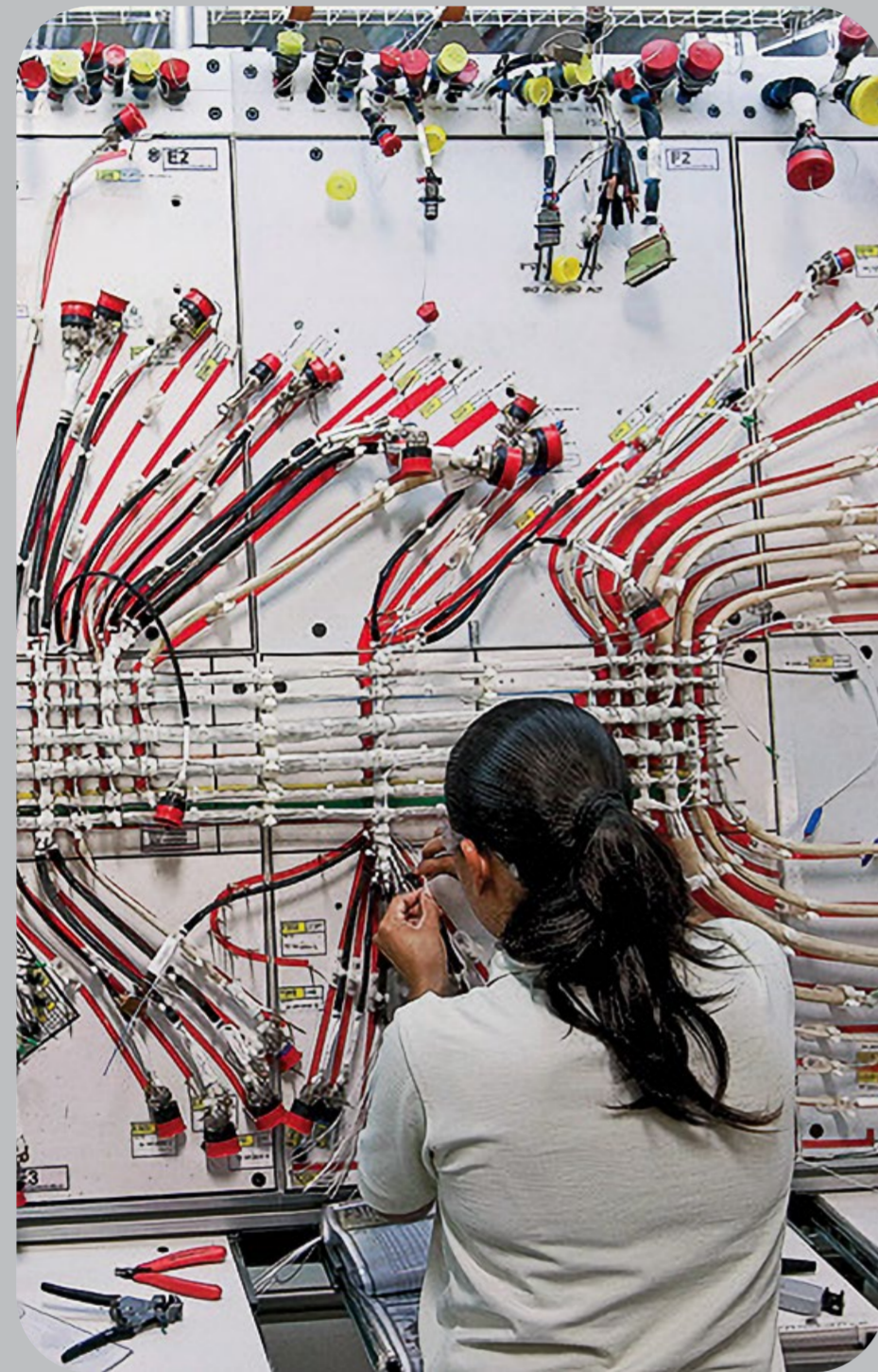
### Employed population

Of the 1,126,361 people employed in the entity, 4.7% are in primary activity, 33.6% in secondary activity and 61.5% in tertiary activity.

### Distribution of the employed population by economic activity in Querétaro (2023)

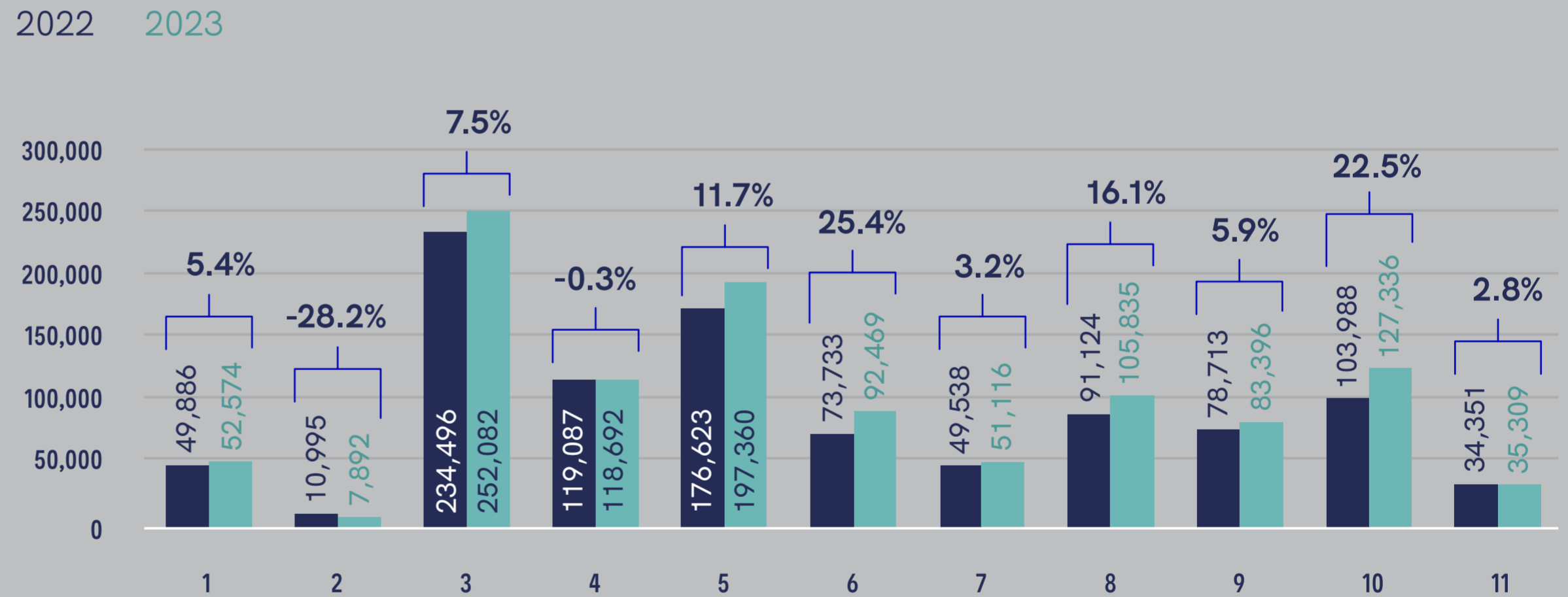


Source: Prepared by the authors with data from the National Institute of Statistics and Geography (National Occupation and Employment Survey, 2023), 2024.  
Note: The figures were obtained by averaging the four quarters of each year.



With respect to the sectors in which the employed population is concentrated, the manufacturing industry stood out for concentrating 22.4% of the employed population, followed by commerce with 17.5%.

Distribution of the employed population by sector in Querétaro (2022-2023)



- 1) Agriculture, livestock, forestry, hunting and fishing
- 2) Extractive and electricity industry
- 3) Manufacturing industry
- 4) Construction
- 5) Trade
- 6) Restaurants and accommodation services
- 7) Transport, communications, mail and storage
- 8) Professional, financial and corporate services
- 9) Social services
- 10) Miscellaneous services
- 11) Government and international organizations

Source: Prepared by the authors with data from the National Institute of Statistics and Geography (National Occupation and Employment Survey, 2023), 2024. Note: The figures were obtained by averaging the four quarters of each year.

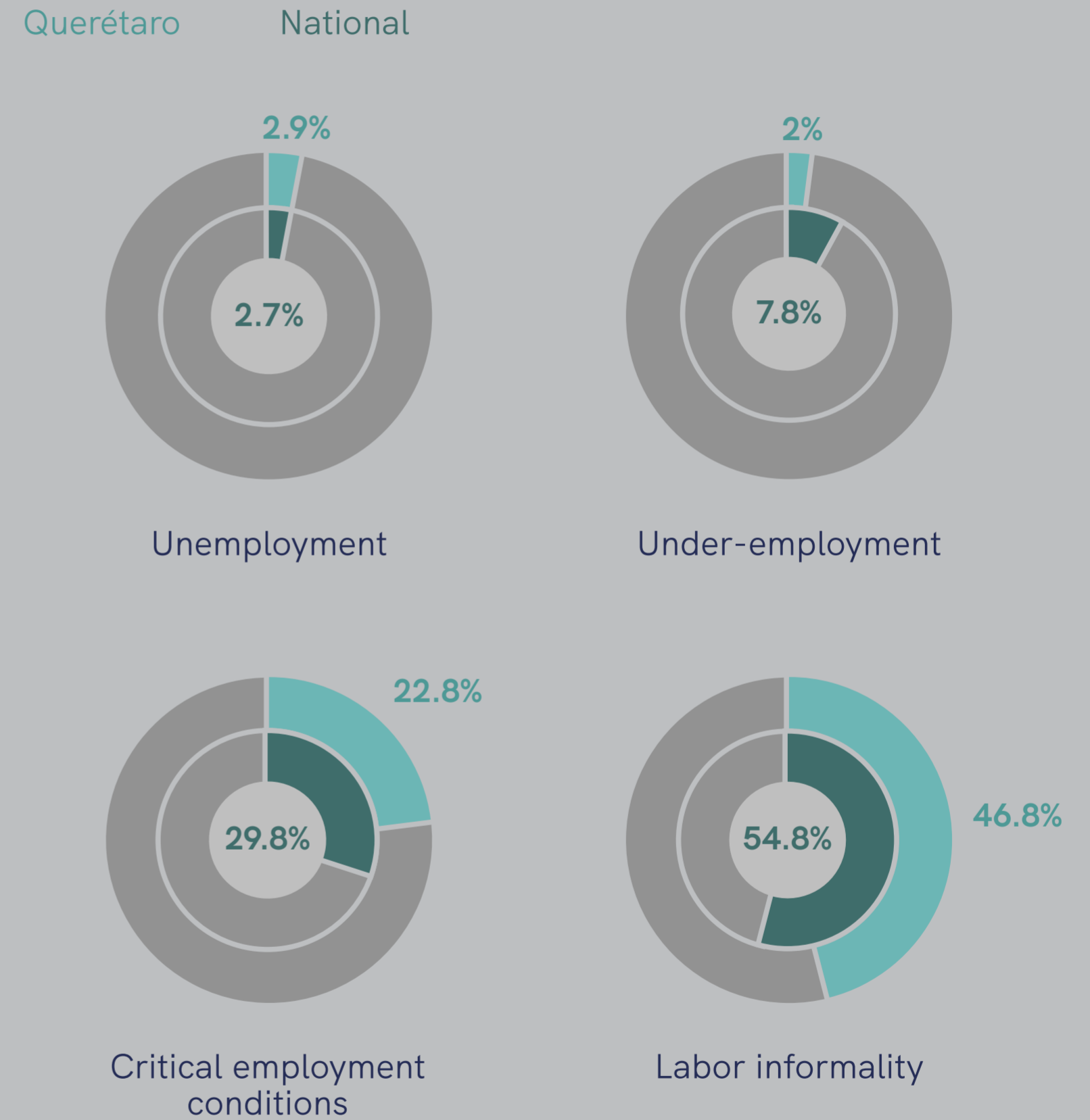




### ENOE Rates

During 4Q 2023, Querétaro presented a higher unemployment rate than the one reported at the national level, however, in the rest the rates are lower in the case of Querétaro.

### Main rates reported in the National Survey of Occupation and Employment in Querétaro and National (4Q 2023)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (National Occupation and Employment Survey, 2023), 2024.



5.2

# Industrial sector

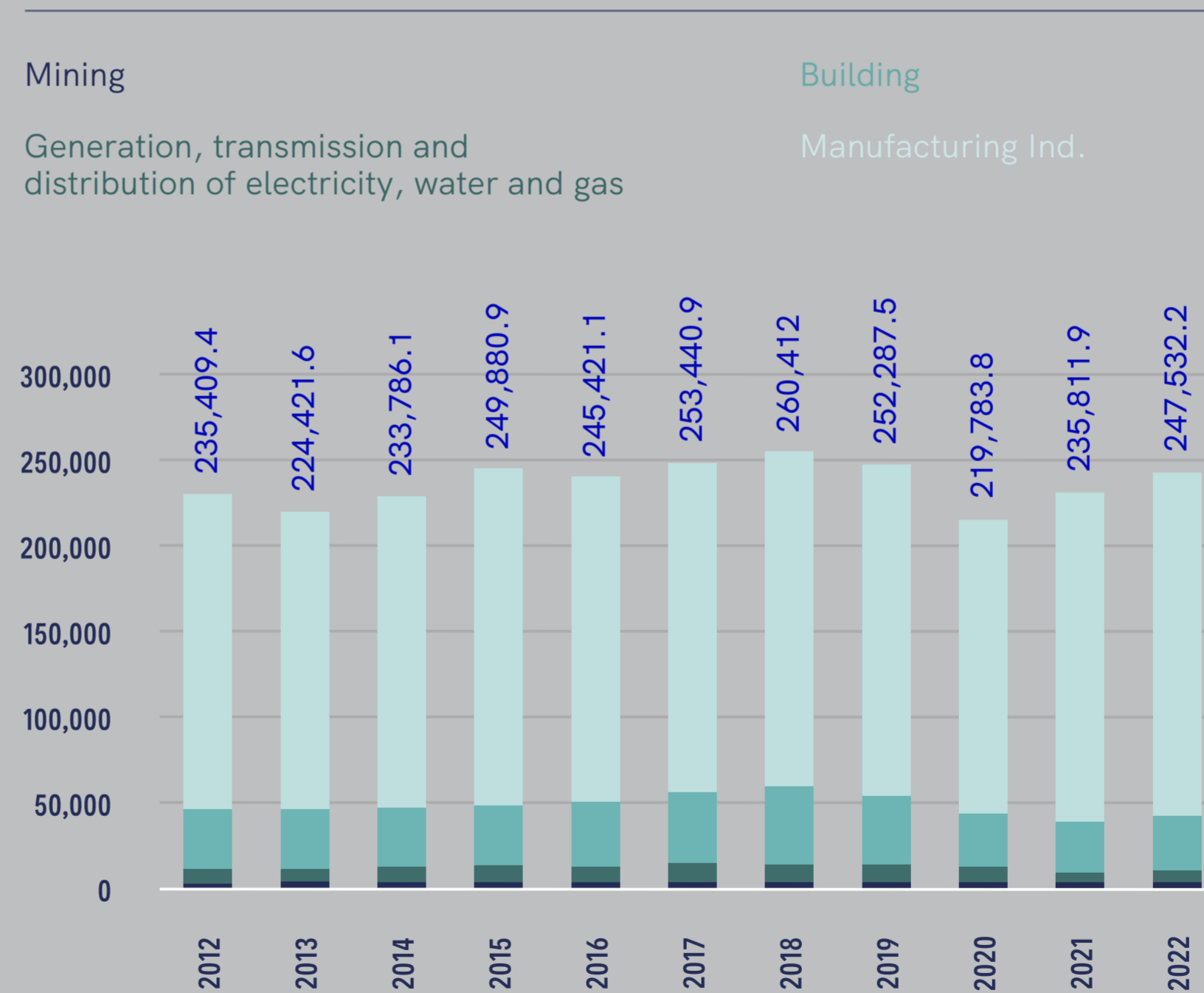
5.2.1

## Production structure of the industry

In 2022, the industrial sector reported MXN \$247,532.2 MM at 2018 prices in GDP, representing 41.8% of the total. The amount maintained an annual variation of 5%.

Of the total, 82.3% is contributed by the manufacturing industry (MXN \$203,606.4 MM), followed by the construction sector with 13.6% (MXN \$33,650.7 MM), generation, transmission and distribution of electricity, water and gas with 2.7% (MXN \$6,745.5 MM) and mining with 1.4% (MXN \$3,529.6 MM).

### Gross Domestic Product (GDP) of secondary activity by sector in Querétaro (2012-2022)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (GDP by state [PIBE]; 2018 base), 2024.  
Note: Figures are expressed in millions of pesos (MXN MM) at 2018 prices.



## Economic units in the production industry

According to the National Statistical Directory of Economic Units (DENUE, by its acronym in Spanish), there are 9,248 economic units dedicated to productive industry in the state, a figure that represents 9.7% of the total number of establishments in the state and 1.4% of establishments dedicated to productive industry at the national level.

### Distribution of productive industry economic units by size in Querétaro (2023)

SIZE	ESTABLISHMENTS	DISTRIBUTION
Micro	7,400	80%
Small	1,107	12%
Medium	507	5.5%
Big	234	2.5%
<b>Total</b>	<b>9,248</b>	<b>100%</b>

Source: Prepared by the authors with data from the National Institute of Statistics and Geography (National Statistical Directory of Economic Units), 2024.

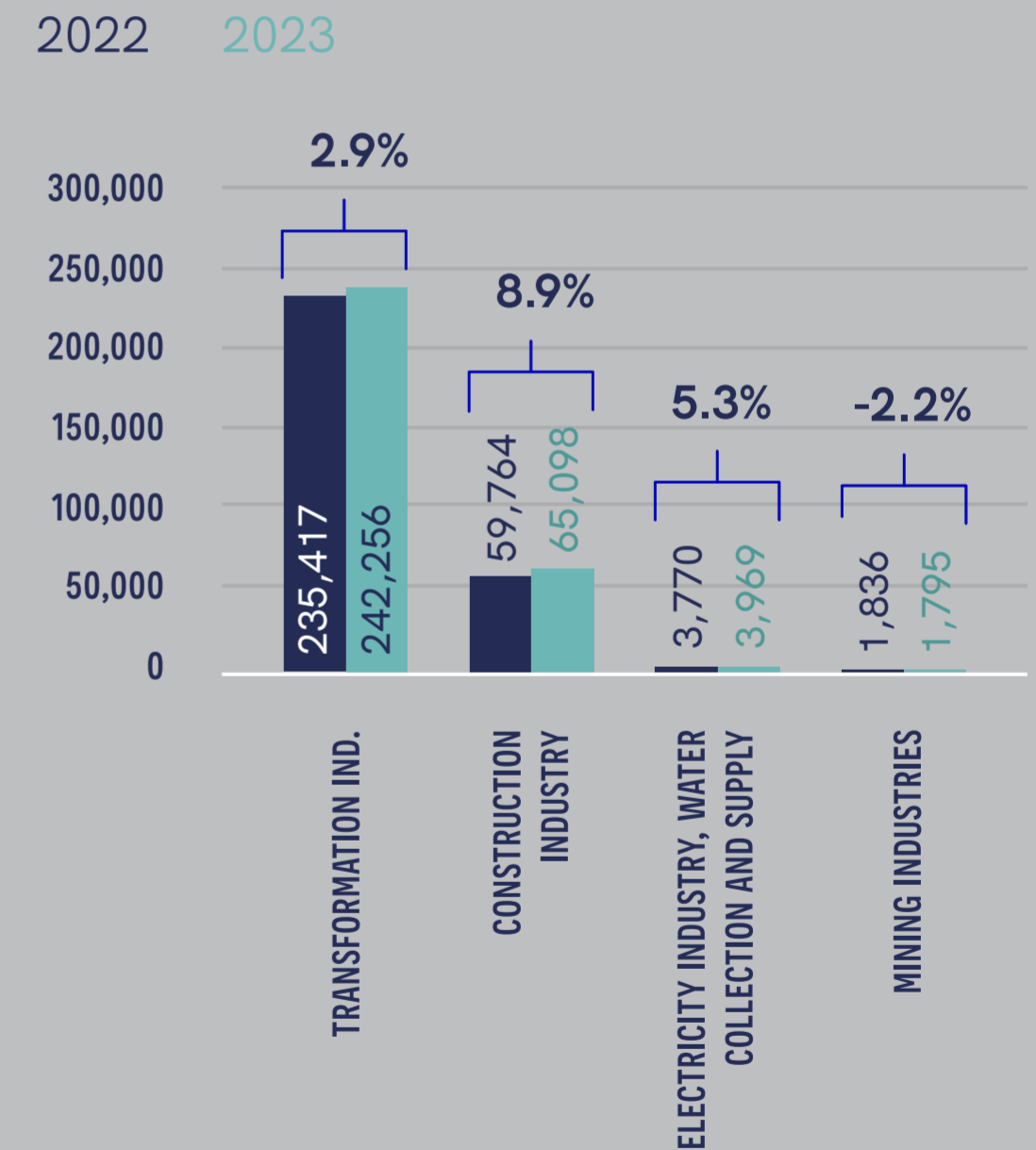
## 5.2.2

### Employment in the secondary sector

In December 2023, the Mexican Social Security Institute (IMSS, by its acronym in Spanish) counted 313,118 people formally working in the secondary sector, 4.1% higher than the number reported in 2022, with 35.8% women and 64.2% men. The average salary remained at \$517.04 pesos for women and \$626.37 for men.

Of the total number of jobs in the secondary sector at the national level (5,357,391), Querétaro accounted for 5.8%.

### Jobs in the secondary sector (December 2022-2023)



Source: Prepared by the authors with data from the Mexican Social Security Institute (Dynamic consultation, jobs by economic sector), 2024.

## 5.2.3

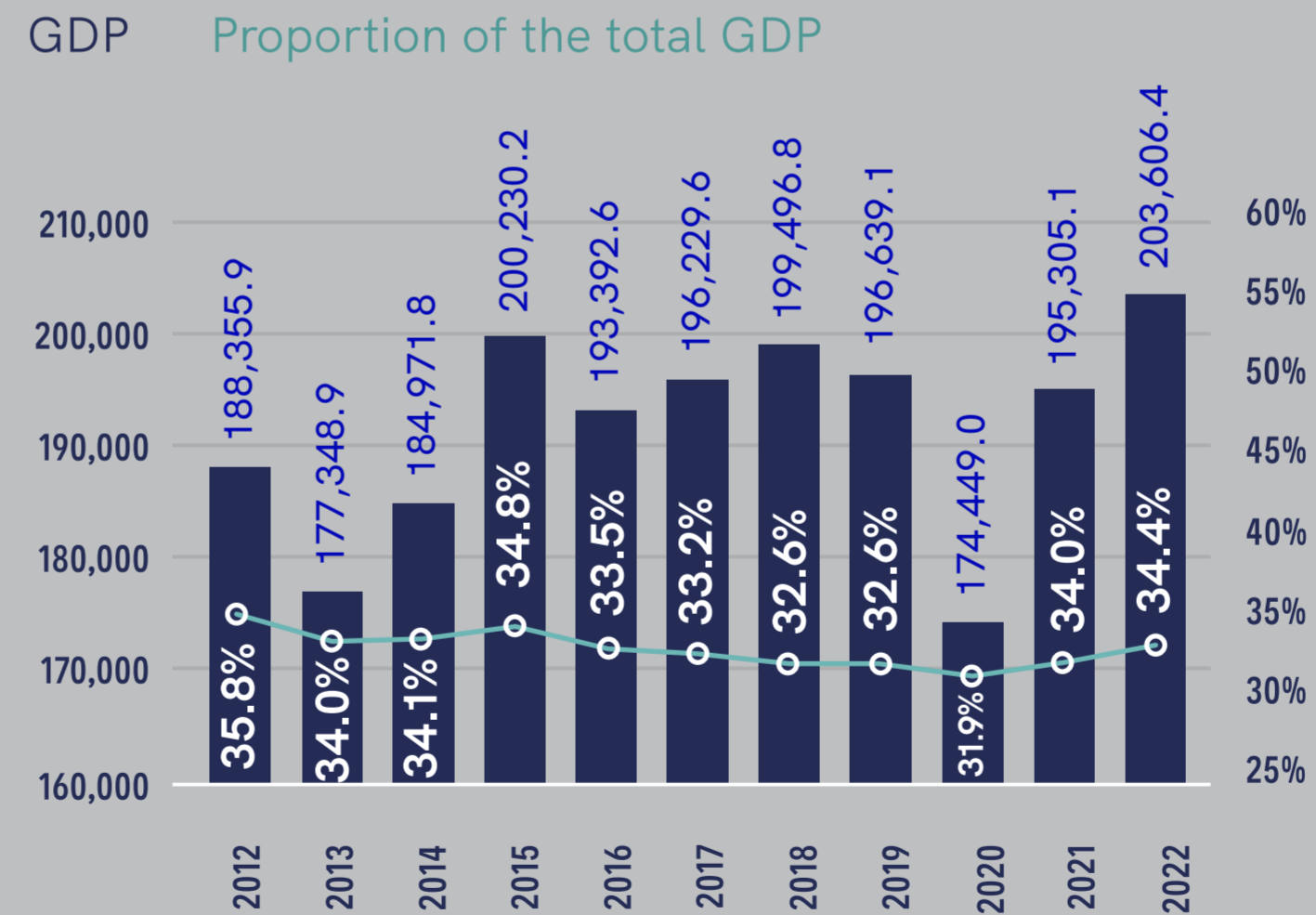
### Manufacturing companies

At the state level, the manufacturing industry is one of the most important sectors, producing a wide range of products that improve the quality of life of the citizens. Comprises economic units dedicated mainly to the food industry, chemical industry, manufacture of transport equipment, among others.

### Gross Domestic Product (GDP) in the manufacturing industry

In Querétaro during 2022, the manufacturing industry reported 203,606.4 million pesos at 2018 prices, representing 34.4% of the total. The amount maintained an annual variation of 4.3%. With respect to the GDP of the manufacturing industry at the national level, the state amount is equivalent to 3.9%.

### Gross Domestic Product in the manufacturing industry in Querétaro (2012-2022)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (GDP by state [PIBE]; 2018 base), 2024.

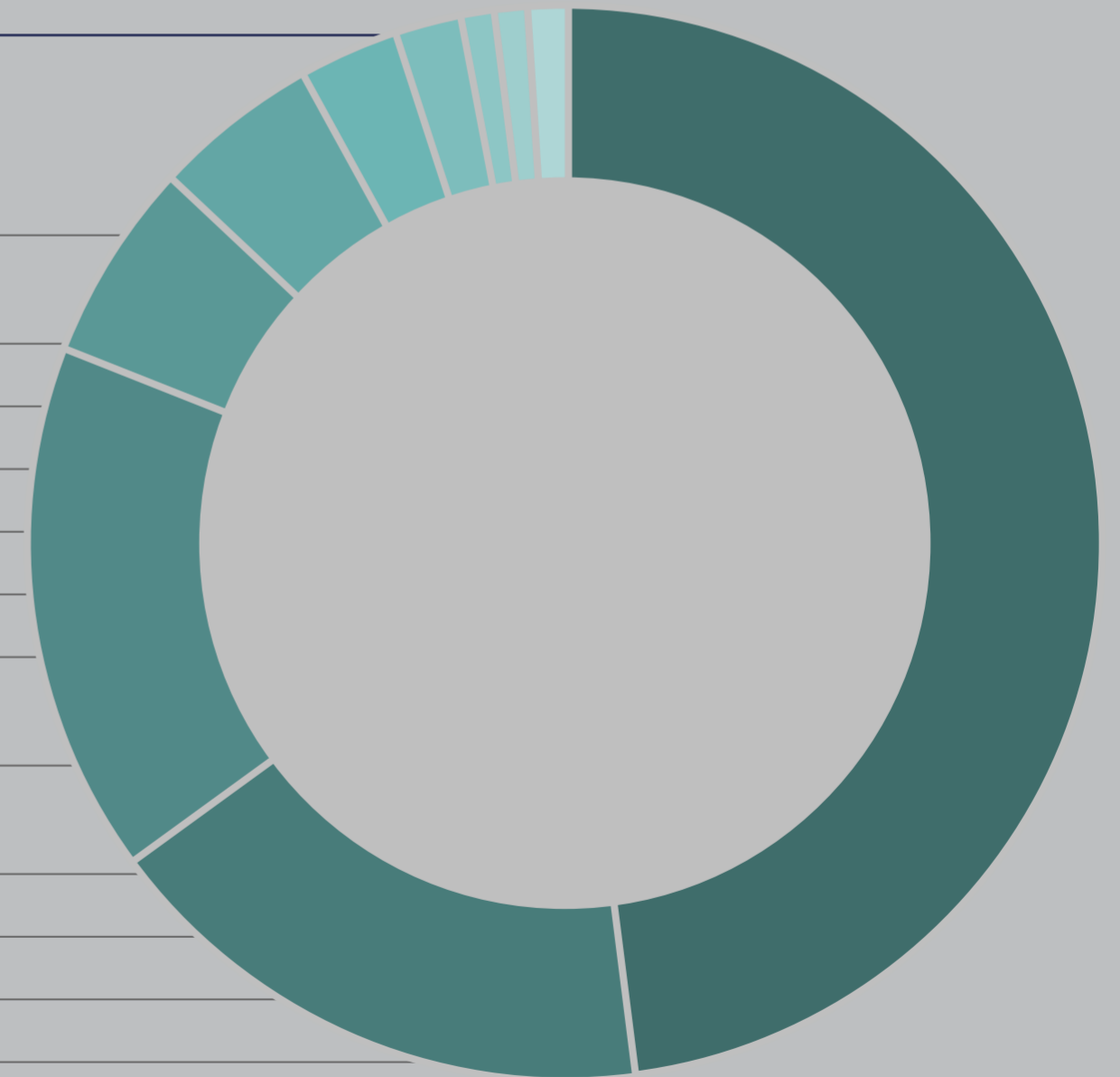
Note: Figures are expressed in millions of Mexican pesos at 2018 prices.





Distribution of Manufacturing Industry GDP by sector in Querétaro (2022)

SECTOR	DISTRIBUTION	VAR. % (2021 - 2022)
Machinery and equipment man.; computing, communication, measuring and other electrical equipment, electronic components and accessories man.; electrical accessories, devices and equipment for electric power generation man.; transport equipment man.	47.8%	8.5%
Manufacture of petroleum and coal products; chemical industry; plastics and rubber industry	17.3%	-2.8%
Food industry	16.0%	2.3%
Basic metal industries; Manufacture of metal products	5.9%	3.4%
Paper and printing and related industries	5.4%	2.7%
Beverage and tobacco industry	2.7%	8.0%
Manufacture of non-metallic mineral-based products	2.2%	6.7%
Manufacture of garments; tanning and dressing of leather and fur, and manufacture of leather, fur and imitation leather goods	0.8%	-6.4%
Manufacture of textile inputs and textile finishing; Manufacture of textile products, except apparel	0.7%	-18.6%
Other manufacturing Ind.	0.5%	6.7%
Manufacture of furniture, mattresses and blinds	0.3%	-4.7%
Wood industry	0.3%	1.0%



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (GDP by state [PIBE]; 2018 base), 2024.



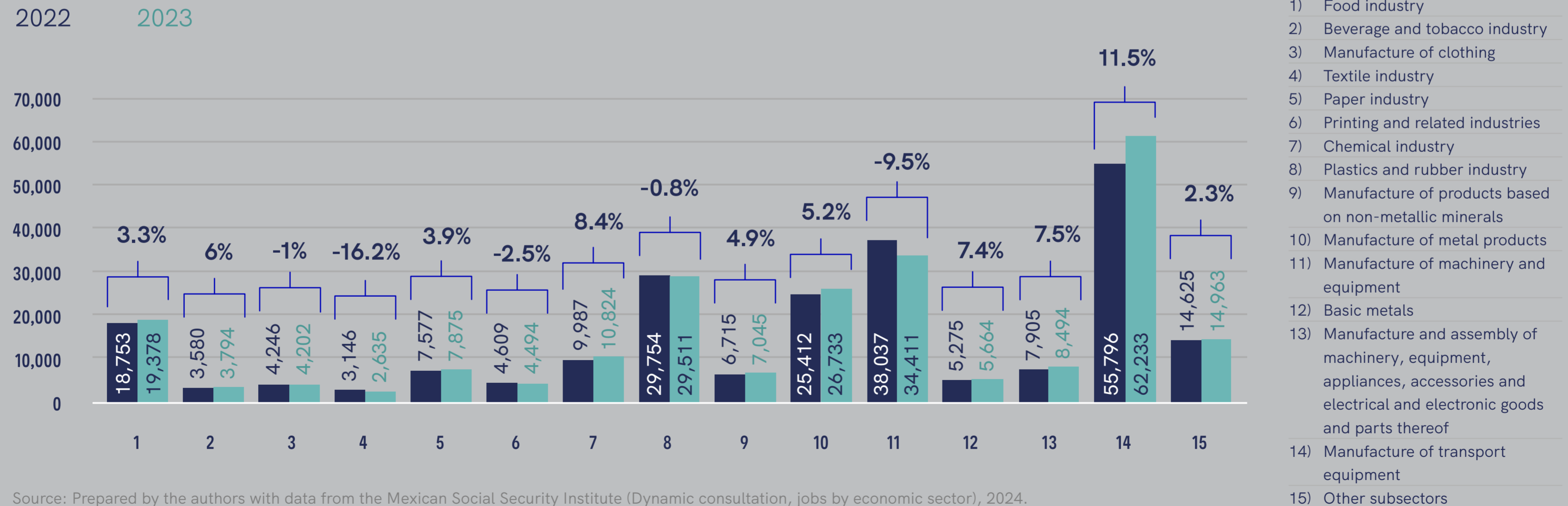
## Employment in the manufacturing industry

In December 2023, the Mexican Social Security Institute (IMSS, by its acronym in Spanish) counted 242,256 people formally working in the manufacturing industry, 2.9% higher than the number reported in 2022, with 40.7% women and 59.3% men. The average salary remained at \$522.65 pesos for women and \$710.71 for men.

Of the total number of manufacturing industry jobs nationwide (5,969,489), Querétaro accounted for 4.1%.

The manufacture of transport equipment accounted for 25.7% of the total number of workers, followed by the manufacture of machinery and equipment with 14.2% and the plastics and rubber industry with 12.2%.

### Manufacturing industry jobs by sector in Querétaro (December 2022-2023)



Source: Prepared by the authors with data from the Mexican Social Security Institute (Dynamic consultation, jobs by economic sector), 2024.



## Economic units in the manufacturing industry

According to the National Statistical Directory of Economic Units (DENUE, by its acronym in Spanish), there are 8,364 economic units dedicated to the manufacturing industry in the state, a figure that represents 8.8% of the total number of establishments in the state and 1.4% of establishments dedicated to the manufacturing industry at the national level.

### Distribution of economic units of the manufacturing industry by size in Querétaro (2023)

SIZE	ESTABLISHMENTS	DISTRIBUTION
Micro	6,937	82.9%
Small	811	9.7%
Medium	408	4.9%
Big	208	2.5%
<b>Total</b>	<b>8,364</b>	<b>100%</b>

Source: Prepared by the authors with data from the National Institute of Statistics and Geography (National Statistical Directory of Economic Units), 2024.





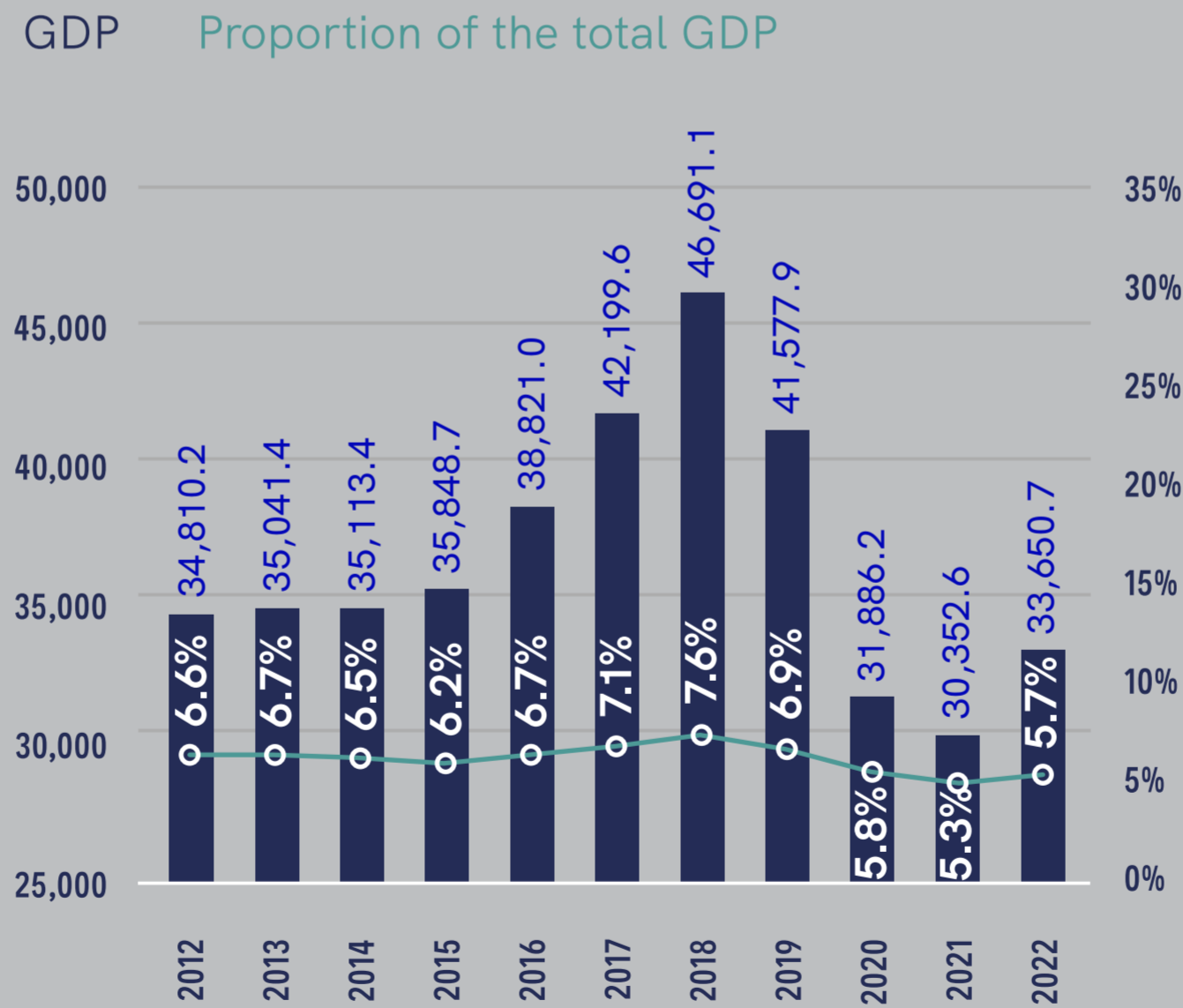
### 5.2.4

## Construction industry

Comprises economic units principally engaged in building, construction of civil engineering works, carrying out specialised construction work such as site preparation, as well as construction supervision of construction works.

During 2022, within GDP, the construction industry reported 33,650.7 million pesos at 2018 prices, representing 5.7% of the total. The amount maintained an annual variation of 10.9%. With respect to the GDP of the construction industry at the national level, the state amount is equivalent to 2.6%.

### Gross Domestic Product in Construction in Querétaro (2021-2022)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (GDP by state [PIBE]; 2018 base), 2024.  
Note: Figures are expressed in millions of pesos in constant values of 2018.

In December 2023, the Mexican Social Security Institute (IMSS, by its acronym in Spanish) counted 65,098 people formally working in the sector, 8.9% more than in 2022, 18.8% of whom were women and 81.2% men. The average salary remained at \$432.15 pesos for women and \$377.91 for men.

According to the National Statistical Directory of Economic Units (DENUE, by its acronym in Spanish), there are 666 economic units dedicated to this sector in the state, 43.5% of which are micro-enterprises, a figure that represents 0.7% of the total number of establishments in the state and 2.4% of establishments dedicated to the sector at the national level.

### Distribution of economic units of the construction industry by size in Querétaro (2023)

SIZE	ESTABLISHMENTS	DISTRIBUTION
Micro	290	43.5%
Small	271	40.7%
Medium	92	13.8%
Big	13	2%
<b>Total</b>	<b>666</b>	<b>100%</b>

Source: Prepared by the authors with data from the National Institute of Statistics and Geography (National Statistical Directory of Economic Units), 2024.



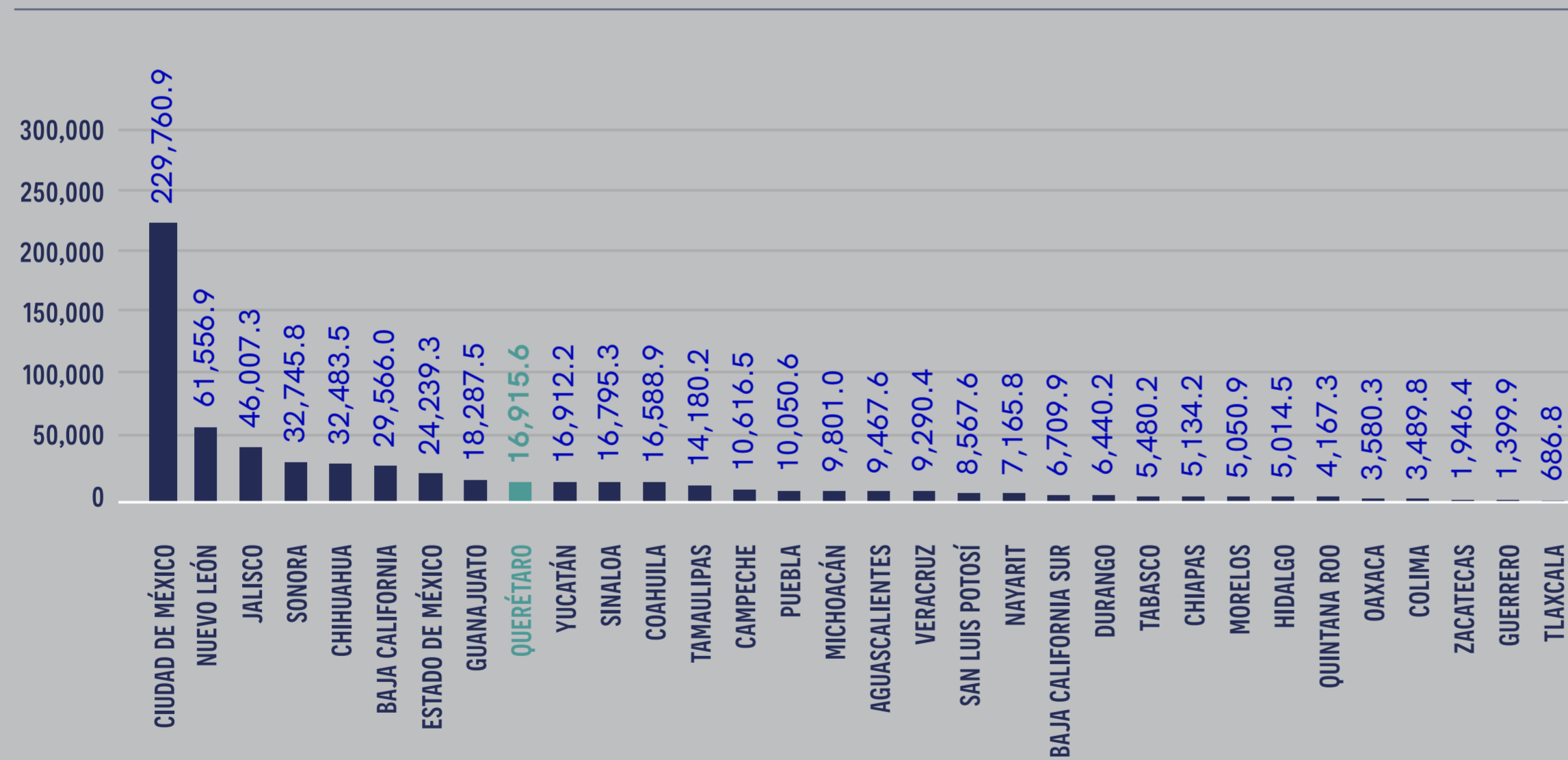


### National Survey of Construction Companies (ENEC by its acronym in Spanish)

During 2023, the value of construction production, according to the location of companies nationwide, stood at 670,099 million pesos in current values, Querétaro accounted for 2.5%, or 16,915.6 million pesos.

The value reported at the state level in 2023 maintained an annual variation of 49.1%, being the 8th fastest growing state.

Production value of the sector according to the location of the company by state (2023)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (National Survey of Construction Companies - ENEC, by its acronym in Spanish), 2024.  
Note: Figures are expressed in millions of pesos at current values.

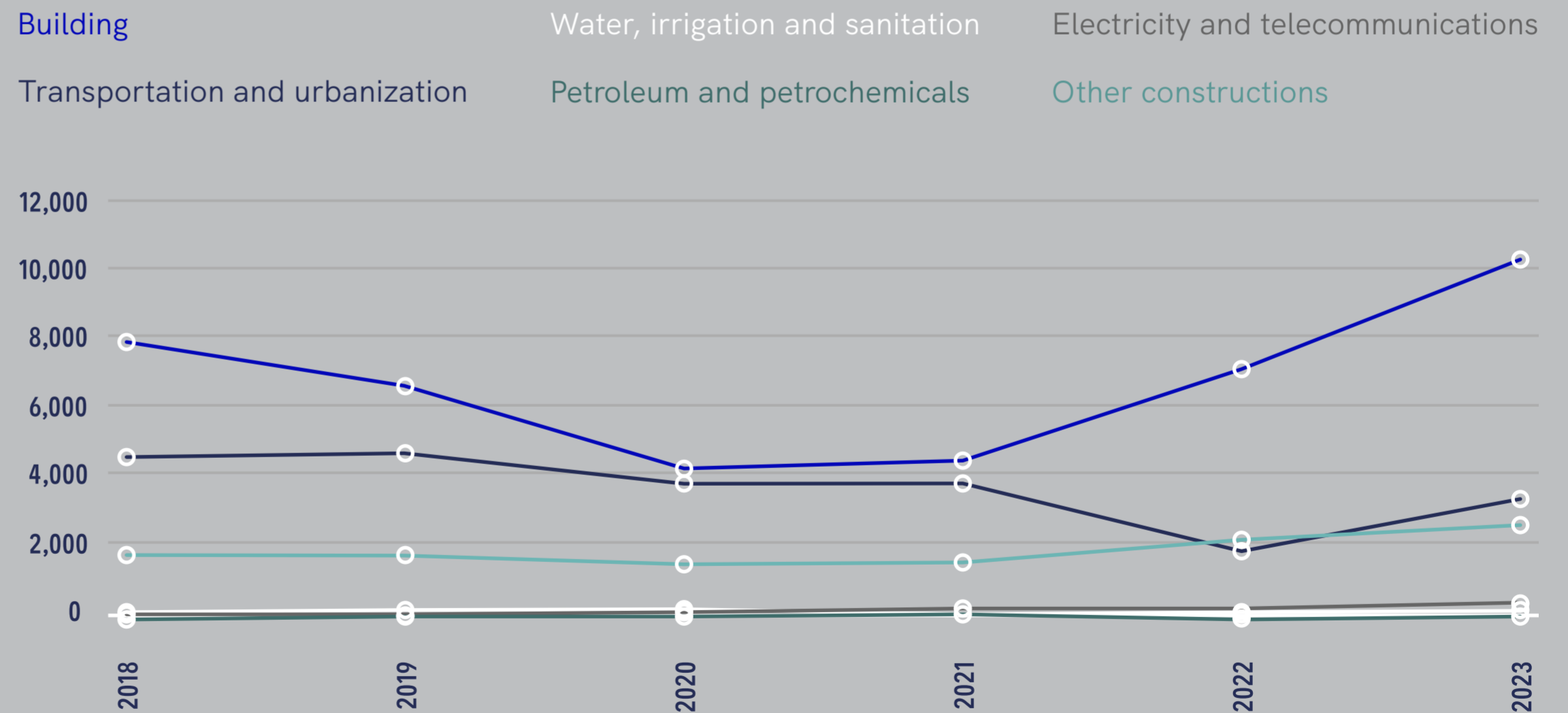




### Value of production by construction sector

In 2023, 61.6% of the value of production was generated by the building sector, i.e. 10,419.4 million current pesos, followed by transport and urbanisation (MXN \$20.2%, 3,414.3 MM), other construction (15.5%, MXN \$2,620.7 MM), electricity and telecommunications (1.9%, MXN \$322.5 MM) and water, irrigation and sanitation (0.7%, MXN \$118.4 MM).

### Production value according to the location of companies by construction sector in Querétaro (2018-2023)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (National Survey of Construction Companies), 2024.

Note: Figures are expressed in millions of pesos at current values.

In previous years, the figures were reported in constant values, currently the report is in current values and only reported as of 2018.



## 5.3

# Triple helix

The State Development Plan 2021-2027 emphasises the link between academia and the productive sectors, with the aim of increasing the relevance of the educational offer in the state. To this end, it establishes as strategic lines to increase research, technological development and innovation products linked to the problems of Querétaro and the needs of the different areas of work.

## 5.3.1

## Higher Education

In 2023, Querétaro had 136 schools divided into five services: higher university technical, bachelor's degree, specialisation, master's degree and doctorate, of which 20.4% are of public support and 79.6% private.

During the 2023-2024 school year, the enrollment registered in schools offering higher

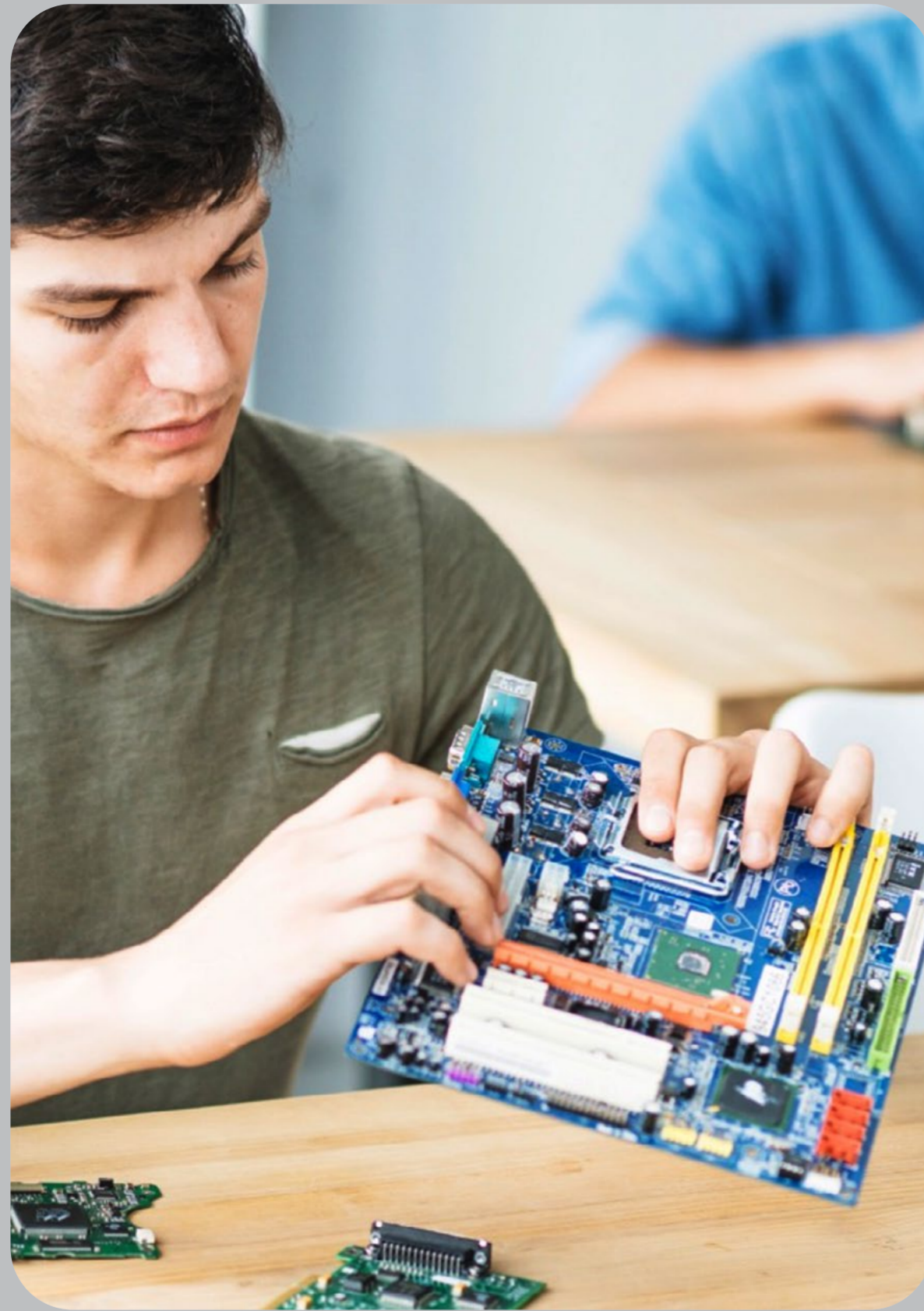
education studies was 103,253 students, 2.3% higher than the enrollment for the 2022-2023 school year.

87.2% of the students were concentrated in the undergraduate service, followed by 6.2% in university technician, 4% in master's degree, 1.7% in specialisation and 1% in doctorate.

### Students in the different educational services (2018-2019/2023-2024 school year)

EDUCATION LEVEL	SCHOOL YEARS					
	2018 - 2019	2019 - 2020	2020 - 2021	2021 - 2022	2022 - 2023	2023 - 2024
Higher University Technical	6,694	7,025	6,723	6,086	6,064	6,435
Bachelor's Degree	76,705	82,718	84,379	86,610	88,231	90,017
Specialty	797	830	865	1,246	1,599	1,737
Master's	4,398	4,586	4,156	4,326	4,094	4,081
PhD	585	659	817	935	990	983
<b>Total</b>	<b>89,179</b>	<b>95,818</b>	<b>96,940</b>	<b>99,203</b>	<b>100,978</b>	<b>103,253</b>

Source: Prepared by the authors with information from the Unit of Services for Basic Education in the State of Querétaro (SEP F911 System), 2024.

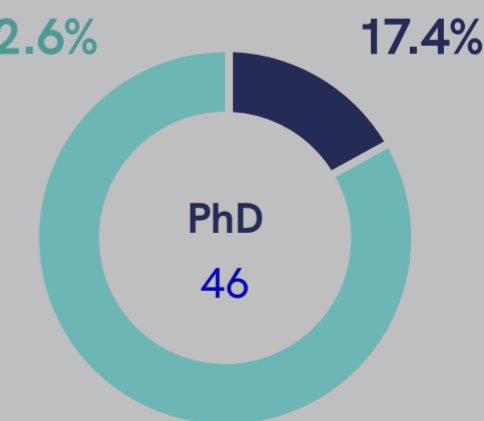
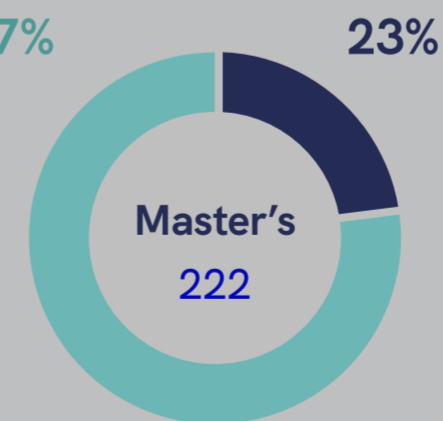
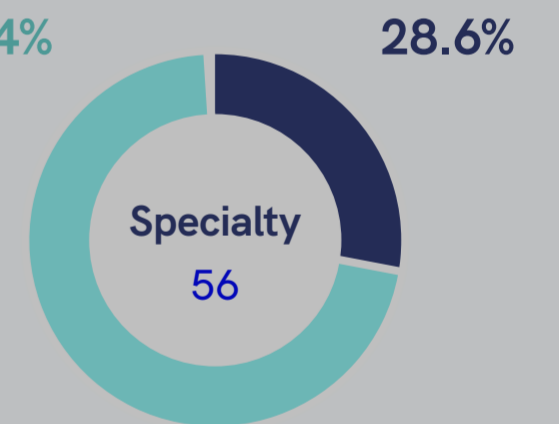
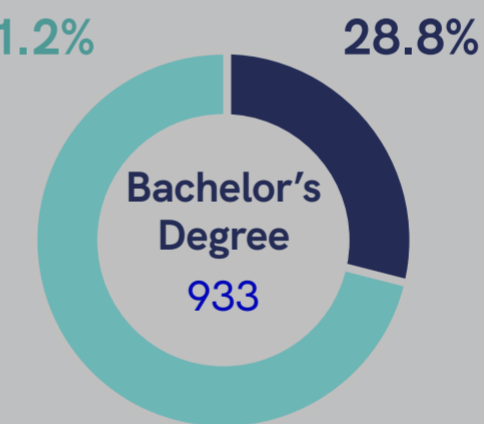
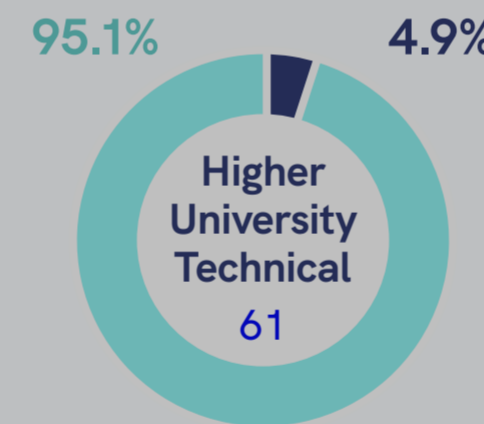


In 2023, 33 new careers were created, reaching 1,318, being 73.7% school-based and 26.3% non-school-based. These courses were taught by 10,844 teachers.

### Degrees by educational service according to modality (School year 2023-2024)

School-based

Non school-based



Source: Prepared by the authors with information from the Unit of Services for Basic Education in the State of Querétaro (SEP F911 System), 2024.

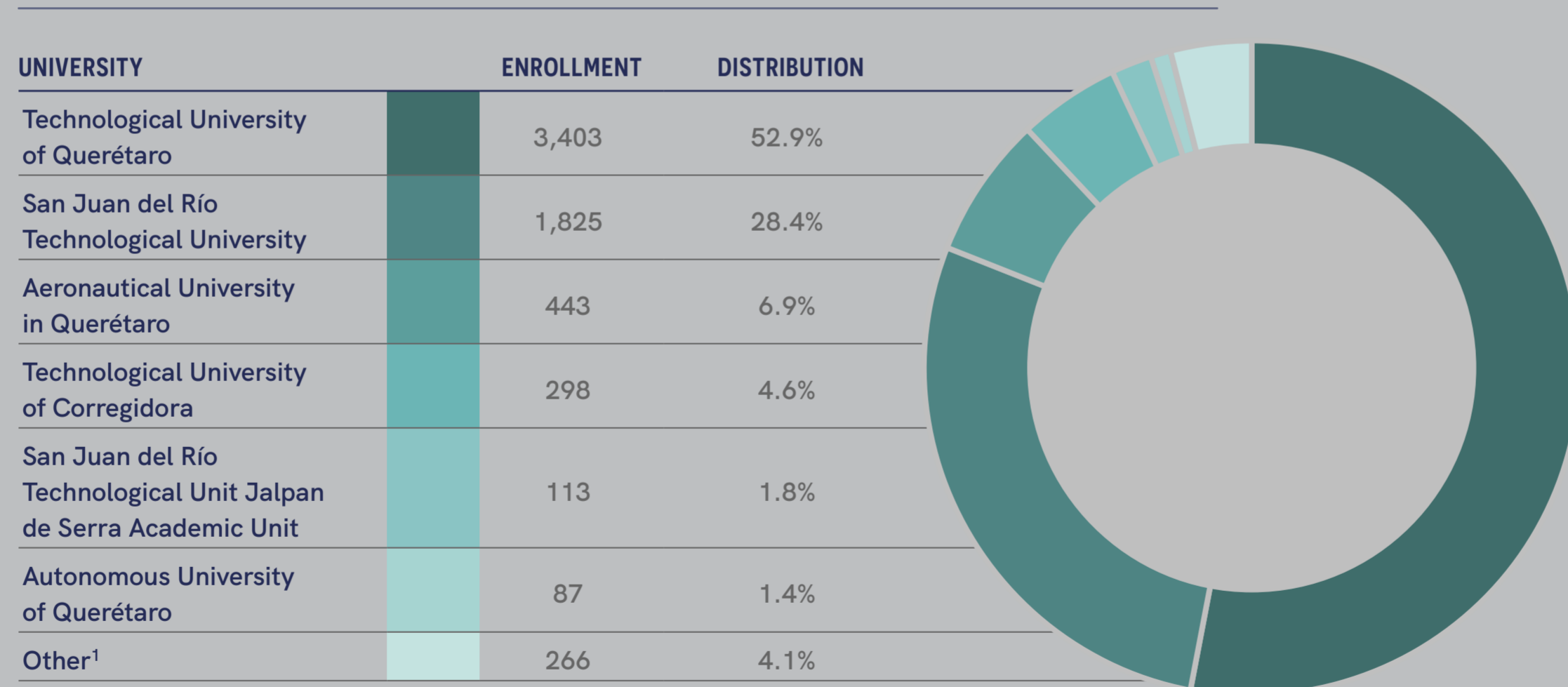


### Higher University Technical

Through the Higher University Technical (TSU, by its acronym in Spanish) service, students have the possibility of entering the labour market more quickly, as they complete their training in less time.

At the state level, there are 16 schools with TSU services, which accounted for 6.2% of the total number of students in the entity during the 2023-2024 school year. Of the total number of students, more than 50% belonged to the Technological University of Querétaro.

Distribution of enrollment in the Higher Technical University Service by Higher Education Institutions (School year 2023-2024)



Source: Prepared by the authors with data of Unit of Services for Basic Education in the State in Querétaro (F911 System of SEP), 2024. Note: <sup>1</sup> Refers to the universities with the smallest number of students, listed below: 1) Constantino Academy of Higher Studies; 2) Atenas, Higher Studies; 3) Professional Career Service Institute; 4) University of London; 5) University Center CEICKOR; 6) Cuauhtémoc University, Querétaro Branch; 7) New Century Podiatry School; 8) Querétaro Rehabilitation Institute; 9) Emprende Institute for Development and Innovation; 10) Mexican School of Aviator Pilot Training.





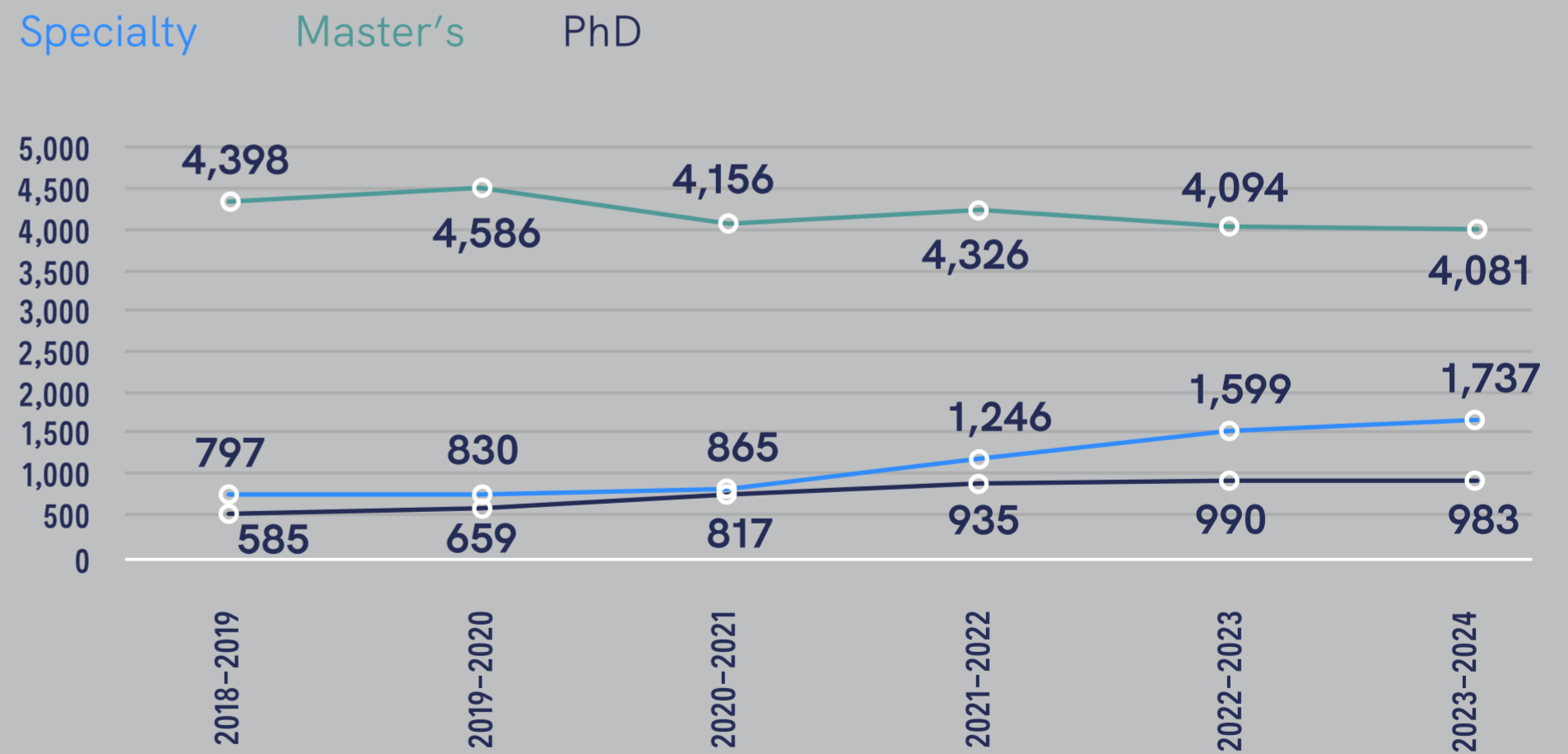
### Postgraduate

During the 2023-2024 school year, 6,801 students were registered in the postgraduate service, 76.5% were in the school-based modality and 23.5% in the non-school-based modality, a figure 1.8% higher than that reported for the 2022-2023 school year. 60% were

at master's level, 25.5% at specialist level and 14.5% at doctoral level.

The specialisation service reported a growth of 8.6% in enrollment, while the master's and doctoral programmes showed a decrease of 0.3% and 0.7% respectively.

### Graduate Enrollment in Higher Education Institutions (School year 2018-2019/2023-2024)



Source: Prepared by the authors with data of Unit of Services for Basic Education in the State in Querétaro (F911 System of SEP), 2024.



### Formation areas

At the state level, there are 10 training areas for university technical, undergraduate and post-graduate services, in which 1,318 careers are concentrated.

Of the total number of students in higher education during the 2023-2024 school year, 48% are concentrated in Business and Administration and Engineering, Manufacturing and Construction. Compared to the previous school year, the number of students in the area of Services maintained the highest growth with 16.8%, Information and Communication Technologies with 12.2% and Education with 6.7%.

### Students, graduates and careers by area of training (School year 2023-2024)

KNOWLEDGE AREAS	BACHELOR'S DEGREE AND TSU			POSTGRADUATE		
	STUDENTS	GRADUATES	DEGREES	STUDENTS	GRADUATES	DEGREES
Administration and Business	22,100	5,128	256	1,404	390	72
Agronomy and Veterinary	964	205	9	17	5	2
Arts and Humanities	5,578	811	78	193	109	19
Health Sciences	11,547	1,571	63	1,606	262	38
Natural Sciences, Mathematics and Statistics	2,391	572	23	336	144	14
Social Sciences and Law	13,633	2,640	156	1,183	638	74
Education	7,178	1,618	114	1,225	354	45
Engineering, Manufacturing and Construction	25,386	6,097	211	679	189	44
Services	2,347	726	31	40	8	5
Information and Communication Technologies	5,328	832	53	118	35	11
<b>Total</b>	<b>96,452</b>	<b>20,200</b>	<b>994</b>	<b>6,801</b>	<b>2,134</b>	<b>324</b>

Source: Prepared by the Unit of Services for Basic Education in the State in Querétaro (F911 System of SEP), 2024.

## Aeronautical University of Querétaro (UNAQ, by its acronym in Spanish)

Its mission is to train professionals and researchers for the aeronautical sector with values, knowledge, skills and national and international recognition. It covers an area of 20 hectares, within the Querétaro International Airport (AIQ, by its acronym in Spanish) and is located just a few kilometres from the most important companies in the sector.

### UNAQ Education offer

#### Higher University Technical (TSU\*)

TSU in Aeronautical Maintenance

Fixed Wing and Engines Area

Avionics Area

Precision Machining Area

#### Engineering Degree

Aeronautical Engineering in Manufacturing (IAM\*)

Aeronautical Mechanical Design Engineering (IDMA\*)

Aircraft Systems Electronics and Control Engineering (IECSA\*)

Aeronautical Maintenance Engineering Continuity Program

#### Postgraduate

Specialty in Valuation of Aeronautical Assets (EVBA\*)

Master's Degree in Aerospace Engineering (MIA\*)

Source: Prepared by the authors with data of the Aeronautical University of Querétaro, 2024.

Note: \*By its acronym in Spanish.



The TSU programmes in Maintenance are authorized by the Federal Civil Aviation Agency (AFAC, by its acronym in Spanish), so that the student can obtain a Class I Maintenance Technician licence

with capacity in Engines and Gliders, or a Class II Maintenance Technician licence with capacity in Aircraft Electronic Systems.





## Infrastructure

The UNAQ is unique in Mexico in having highly specialized infrastructure and equipment:

- ▶ A warehouse of 18,500 m<sup>2</sup>.
- ▶ Eleven workshops, including CNC machining, composite materials, electrical assemblies, structural assemblies, sheet metal forming, among others.
- ▶ A Franco-Mexican platform comprising 15 laboratories including: coordinate machine, aeronautical parts store, aircraft system, electricity and batteries, avionics, strength of materials, thermal machines, engines, thermal processes and welding, penetrant liquids, chemical treatments, electronics, surface treatments, aerodynamics and metallography.
- ▶ A total of 14 aircraft which are laboratories for the training of higher level professionals and one more for historical and museographic purposes.
- ▶ Two academic buildings, sports and recreational areas with a total surface area of

3,981.7 m<sup>2</sup> and 2,407.5 m<sup>2</sup> of recreational spaces.

- ▶ A total of 45 academic classrooms with a capacity of more than 1,200 students (in one shift).
- ▶ Three information centres (libraries), as well as computer, English, physics, chemistry and simulation laboratories.
- ▶ IT infrastructure, with certified cabling guaranteed for 20 years.
- ▶ An A320 fuselage that serves as emergency training for flight attendants and maintenance rolling mill.

## Training

It also has a Training Centre authorized by the Federal Civil Aviation Agency (AFAC), with more than 300 training, on-the-job training and continuing education courses. In 2023, 25,709 hours of training were delivered in 698 courses. Through them, 5,375 people were trained.



The top companies that were provided with technical training for on-the-job training in 2023 were: TechOps, Viva Aerobus, EDAE, CTASE, Airbus, Volaris, Bombardier, AIQ, Volar en globo, SEMAR, SAFRAN, TAR, Fokker AGN Aerospace, ITP.

The courses offered to the public are “Aviation Flight Attendant Training” and “Operations Officers”.



### Technological University of Querétaro (UTEQ, by its acronym in Spanish)

Its objective is to contribute to the comprehensive training of higher education students with a focus on technological innovation, social and pedagogical responsibility for the common good in order to have an impact on the transformation of society.

At the beginning of the 2023-2024 school year, the enrollment registered at UTEQ was 5,550 students, with the TSU in Industrial Processes in the area of Manufacturing; Business Development in the area of Marketing; and Industrial Engineering being the most in demand.

### UTEQ Education offer

#### HIGHER UNIVERSITY TECHNICIAN WITH CONTINUITY TO BACHELOR'S DEGREE/ENGINEERING DEGREE

Higher University Technical (TSU, by its acronym in Spanish)	Bachelor's Degree/Engineering
TSU in Administration Human Capital Area	Bachelor's Degree in Human Capital Management
TSU in Business Development Automotive Aftermarket Services Area Marketing Area	Bachelor's Degree in Business and Marketing Innovation
TSU in Logistics Supply Chain Area	Design and Management of Logistics Networks Bachelor's Degree
TSU in English Language	Bachelor's Degree in Educational and Circular Institutional Management
TSU in Maintenance Industrial Area	Industrial Maintenance Engineering
TSU in Nanotechnology Material Areas	Nanotechnology Engineering
TSU in Industrial Processes Manufacturing Areas Plastics Area	Industrial Engineering
TSU in Mechanics Automotive Area Molds and Dies Area	Metal Mechanical Engineering
TSU in Sustainable and Protected Agriculture	Sustainable and Protected Agriculture Engineering
TSU in Chemistry Environmental Technology Area	Environmental Engineering
TSU in Renewable energy Solar Energy Area Quality and Energy Saving Area	Renewable Energy Engineering
TSU in Mechatronics Automotive Area	Automation Technologies Engineering
TSU in Information Technology Multiplatform Software Development Area Digital Network Infrastructure Area	Software Development and Management Engineering Smart Grid and Cybersecurity Engineering

Postgraduate	
Master's Degree in Smart Manufacturing Engineering	
Master's Degree in Circular Economy	
Master's Degree in Global Supply Chain Logistics Management	

Source: Prepared by the authors with information from the Technological University of Querétaro, 2024.



## UTEQ Campus Colón

In 2023, a collaboration agreement was signed with the Municipality of Colón for the installation, operation, development and construction of an academic unit in alliance with the Kingdom of the Netherlands, with the aim of providing higher technical university education and bachelor's degrees in that region. It will start classes in September 2023, offering degrees in Sustainable and Protected Agriculture, as well as another in Industrial Processes in the area of Manufacturing.

## Quality of Educational Programmes

In the course of 2023, there were 12 higher university technician (TSU) programmes accredited by bodies recognised by the Council for Higher Education Accreditation. At undergraduate level, 6 educational programmes were accredited.

The TSU educational programme in Logistics, specifically in the area of Supply Chain, as well as the Bachelor's Degree in Design and Management of Logistics Networks, have double accreditation both nationally and internationally.

## Accreditation of educational programs (2023)

EDUCATIONAL PROGRAM	ACCREDITATION BODY	YEAR OF ACCREDITATION	VALIDITY
TSU in Human Capital Management	CACECA	12 April 2019	12 April 2024
TSU in Business Development, Marketing Area	CACECA	12 April 2019	12 April 2024
TSU in Business Development in the Automotive Aftermarket Services Area	CACECA	1 August 2021	1 August 2026
TSU in Logistics Supply Chain Area	CACECA/AICE	31 December 2022	31 December 2027
TSU in Industrial Maintenance	CACEI	12 May 2020	11 May 2025
TSU in Industrial Processes in the Manufacturing Area	CACEI	12 May 2020	11 May 2025
TSU in Industrial Processes in the Plastics Area	CACEI	12 May 2020	11 May 2025
TSU in Mechatronics, Automation Area	CACEI	9 December 2021	8 December 2026
TSU in Information Technology in the area of Digital Network Infrastructure	CONAIC	5 March 2018	04 March 2023
TSU in Information Technology area Multiplatform Software Development	CONAIC	5 March 2018	04 March 2023
TSU in Chemistry, Environmental Technology	CACEI	9 December 2021	8 December 2026
TSU in Renewable Energies area Solar Energy	CACEI	5 December 2019	4 December 2024
Industrial Maintenance Engineering	CACEI	16 May 2022	15 May 2025
Industrial Engineering	CACEI	16 May 2022	15 May 2025
Environmental Engineering	CACEI	1 September 2022	31 August 2025
Renewable Energy Engineering	CACEI	1 September 2022	31 August 2025
Software Development and Management Engineering	CONAIC	19 February 2021	18 February 2026
Design and Management of Logistics Networks Bachelor's Degree	CACECA/AICE	31 December 2022	31 December 2027

Source: Prepared by the Technological University of Querétaro with data from the Degree Division, 2024.



## Certifications

UTEQ maintained the certification of the Education Management System (SGE, by its Spanish acronym) in the ISO 21001:2018 “Management Systems for Educational Organisations” standard for 2023. Its purpose is to demonstrate that the university has the capacity to support the acquisition and development of competences through teaching, learning and/or research. It also demonstrates that UTEQ aims to increase student and staff satisfaction through effective implementation, including processes for system improvement and assurance of compliance with student requirements.

## Mobility

During 2023, the area of internationalisation had a great outreach, fulfilling the objective of providing students with an international student experience.

## Mobility programs (2023)

NAME OF THE PROGRAM	BENEFITTED STUDENTS	DESTINATION
EmFuTech Participation (Emerging Technologies Training Program)	2	Japan
Querétaro Ambassadors Scholarship Winners	28	Japan, United States, France, Korea, Germany, Canada and Hong Kong
Bicentennial Ambassadors Scholarship Winners	5	United States
Mobility to Universities (Pai Chai and Ulsan) in South Korea for signing an agreement.	5	South Korea
2023 Automatization and Industry Leadership Badge Scholarship Winners	3	Canada

Source: Prepared by the authors with information from Technological University of Querétaro, 2024.

In addition to the mobility programmes, agreements were signed, as well as relations with various educational institutions.

- ▶ A working mission was made to Colombia, where agreements were negotiated to participate in the next edition of the Pacific Alliance. Contact was also made with different



universities in various countries with which we are seeking to generate collaborative work.

- ▶ UTEQ was the host university for the XVI Summit of Rectors of Mexico and Cuba, where a series of collaboration agreements were signed with Cuban universities.
- ▶ A collaboration agreement was signed with the Safran company and a training project was carried out with UTEQ students in France for 4 months.



## Polytechnic University of Querétaro (UPQ, by its acronym in Spanish)

Its mission is to provide a quality educational offer with a global vision and an automotive focus, meeting high standards of professional training to generate human capital that is an agent of change, through comprehensive training that contributes to and links with the productive sector, recognizing the trends demanded by industry 4.0, circular economy, innovation and corporate social responsibility with the aim of strengthening the higher education system.

By the end of 2023, UPQ had a registered enrollment of 4,420 active students and 464 graduates. Within its broad educational offer, Automotive Technology Engineering and Mechatronics Engineering are in high demand, as is the Bachelor's Degree in International Business.

### UPQ Education offer

<b>Undergraduate</b>
<b>Engineering Degree</b>
Mechatronic Engineering
Manufacturing Technology Engineering
Automotive Technology Engineering
Computer Systems Engineering
Network and Telecommunications Engineering
Data Engineering <sup>1</sup>
<b>Bachelor's Degrees</b>
Bachelor's Degree in International Business
Bachelor's Degree in Business Administration and Management
<b>Postgraduate</b>
Master's Degree in Production Systems Engineering and Industry 4.0
Master's Degree in Administrative Engineering

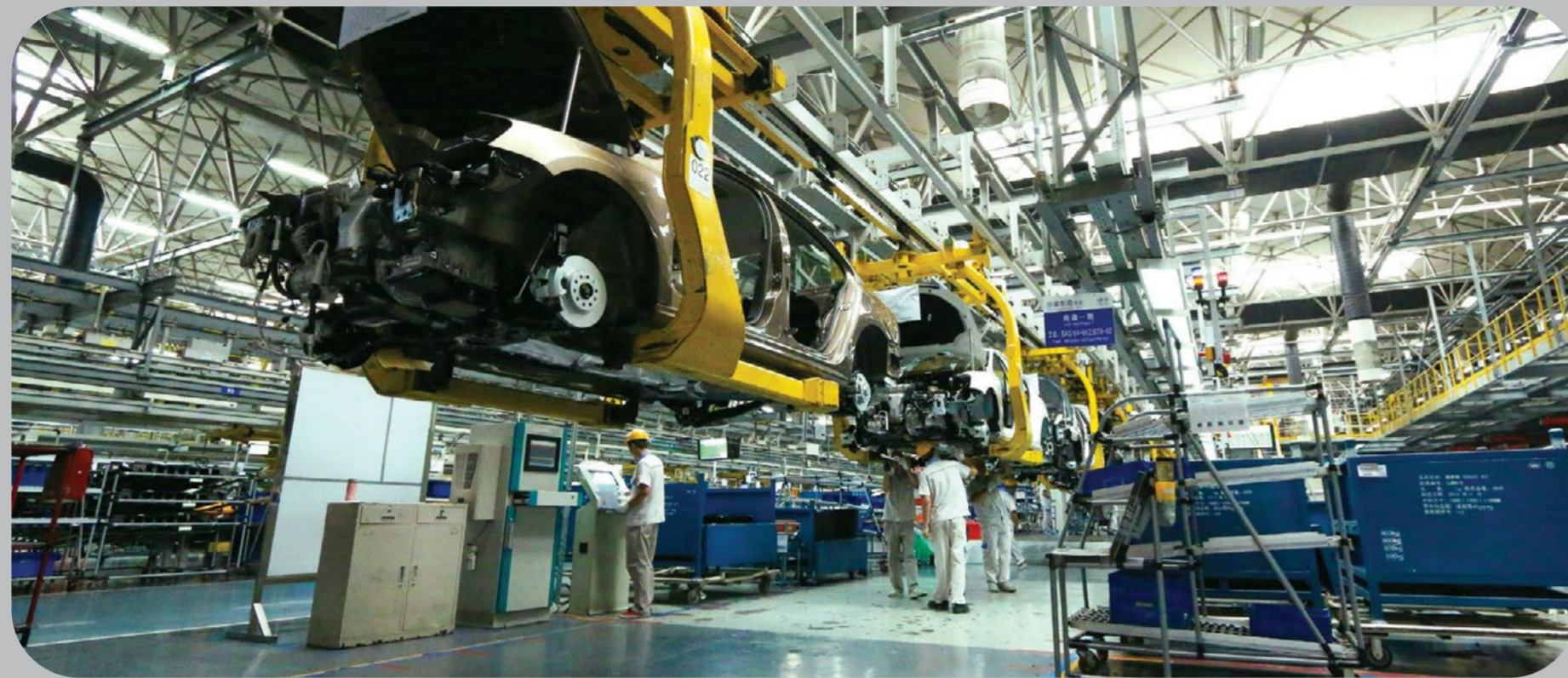
Source: Prepared by the authors with information from Polytechnic University of Querétaro (UPQ), 2024.

Note: <sup>1</sup> The engineering work was carried out and is expected to open in September 2024.

UPQ has a consolidated infrastructure to provide a quality educational service, supporting knowledge through practice in specialised laboratories. Of the total number of buildings, 3 of them stand out for being focused on strengthening the areas of expertise of the different engineering courses taught at UPQ, these are:

- ▶ CIDEA Building (Center for Automotive Innovation and Development).
- ▶ CAPTA Building (Center for Automotive Talent Learning and Professionalization).
- ▶ Lt1 Building (Laboratories and workshops 1).

These buildings were the result of various agreements with companies such as BROSE, Huawei, ZF, Irizar and AERI. The spaces are equipped with high-tech equipment used in the productive sector, giving students the opportunity to obtain a complete learning experience. Complementing the quality of the educational service, the companies provide courses for the university's teaching staff to ensure proper handling of the equipment.



Following up on the ISO 21001:2018 certification obtained on 9 July 2021, the second confirmation audit was carried out on 3 August 2023, which keeps the university certified with a Quality Management System for Educational Organisations.

UPQ seeks to guarantee educational quality through the accreditation of all its educational programmes by external bodies. Therefore, certifications are a very important aspect for the university.

As part of its links with the industrial sector, the UPQ is working on the consolidation of the Dual Training Model, which allows students to acquire

different professional competencies by immersing them in the labour field, thus strengthening their integral development, alternating their learning time between the industry and the university.

Companies actively participate in the university's job exchange and are invited to train their staff with the courses and diplomas offered by the Business Training area.

On the other hand, the UPQ subscribes to the EBC model: competency-based education, through which it seeks to ensure comprehensive educational quality for the student body, a model that is used in the Polytechnic Universities subsystem.

### Certifications and accreditations of Polytechnic University de Querétaro

NAME OF CERTIFICATION/ ACCREDITATION	DATE OBTAINED	VALIDITY
ISO 21001:2018 Certification in Management Systems for Educational Organisations	9 July 2021	12 July 2024
Accreditation by the CIEES of the Computer Systems Engineering Educational Program.	February 2023	March 2028
Accreditation by the CIEES of the Network and Telecommunications Engineering Educational Program.	February 2023	March 2028
Accreditation by the CIEES of the Bachelor's Degree Program in Administration and Institutional Management.	December 2023	January 2029
Accreditation by the CIEES of the International Business Degree Program	December 2023	January 2029

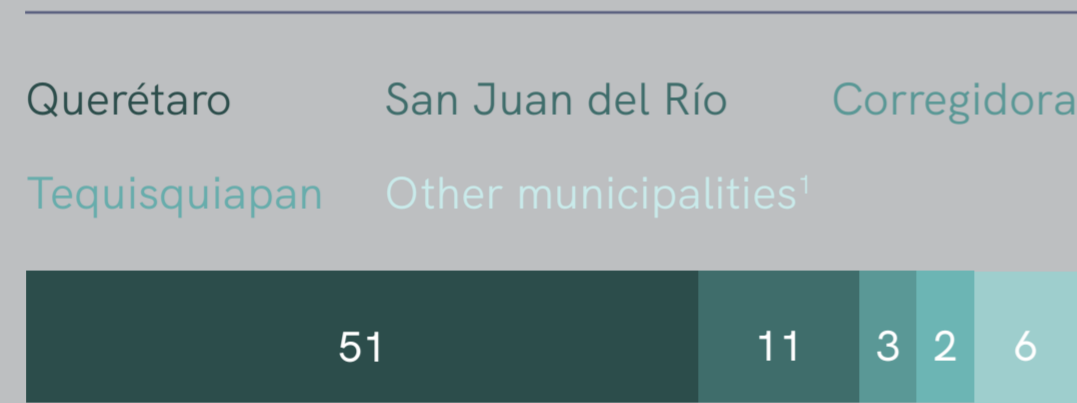
Source: Prepared by Polytechnic University of Querétaro with data from the Planning Department, 2024.

5.3.2

### Training for work

At the end of the 2022-2023 school year, 73 training centers were registered in 10 of the 18 municipalities of the entity.

Distribution of training centers by municipality (School year 2022-2023)

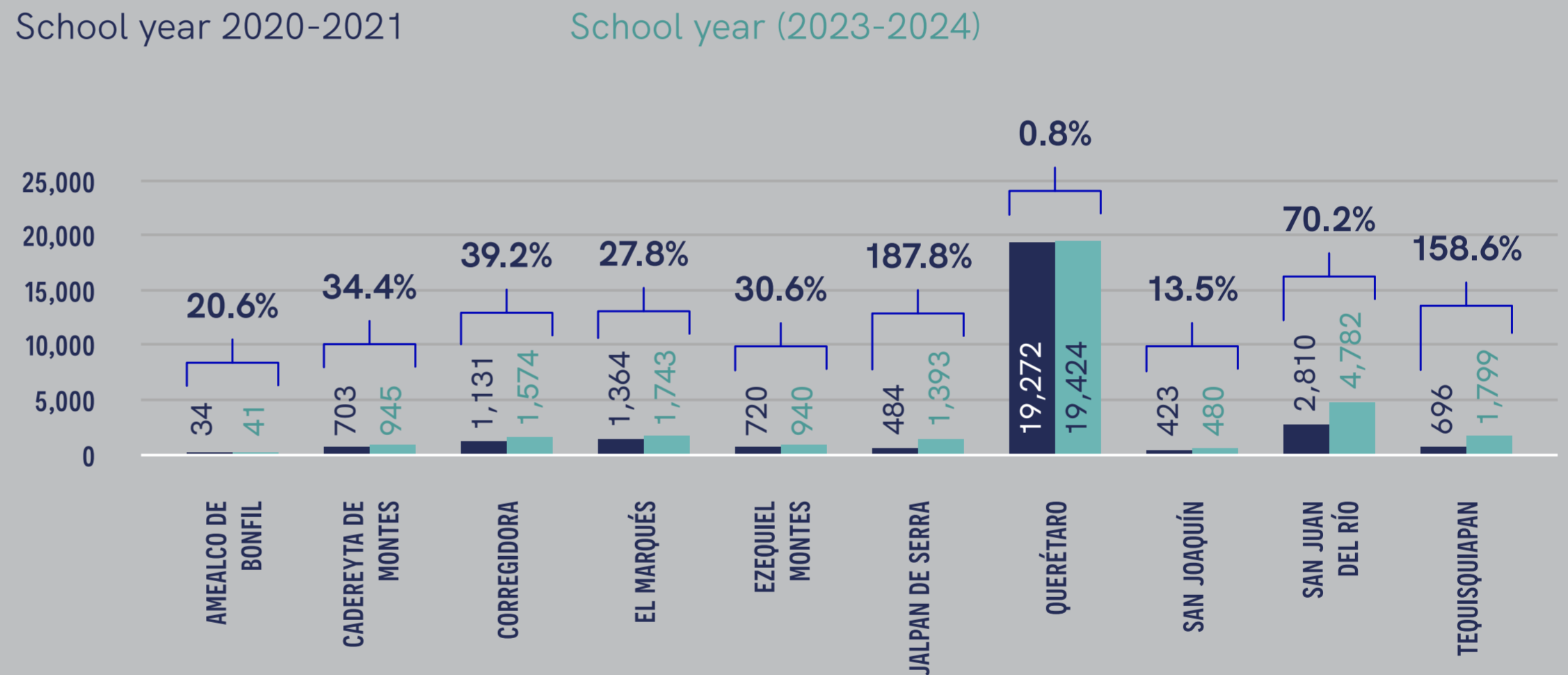


Source: Prepared by the authors with information from the Unidad de Servicios para la Educación Básica en el Estado de Querétaro (SEP F911 System), 2024.

Note: <sup>1</sup> Considers the municipalities of Amealco de Bonfil, Cadereyta de Montes, El Marqués, Ezequiel Montes, Jalpan de Serra and San Joaquín each have a training center.

Total enrollment was 33,121, an increase of 19.8% over the previous school year. Of those enrolled, 61% were women (20,216) and 39% men (12,905).

Enrollment in job training centers (School year 2021-2022/2022-2023)



Source: Prepared by the authors with data of Unit of Services for Basic Education in the State in Querétaro (F911 System of SEP), 2024.

In Amealco de Bonfil, 100% are women, followed by Jalpan de Serra with 81.1%, San Joaquín with 79%, Cadereyta de Montes with 77.2%, Ezequiel Montes with 75.6%, Corregidora with 74.9%,

Tequisquiapan with 72.5%, Querétaro with 61.7% and San Juan del Río with 53%. Only in El Marqués, the presence of men is greater than that of women (87.1%-12.9% respectively).



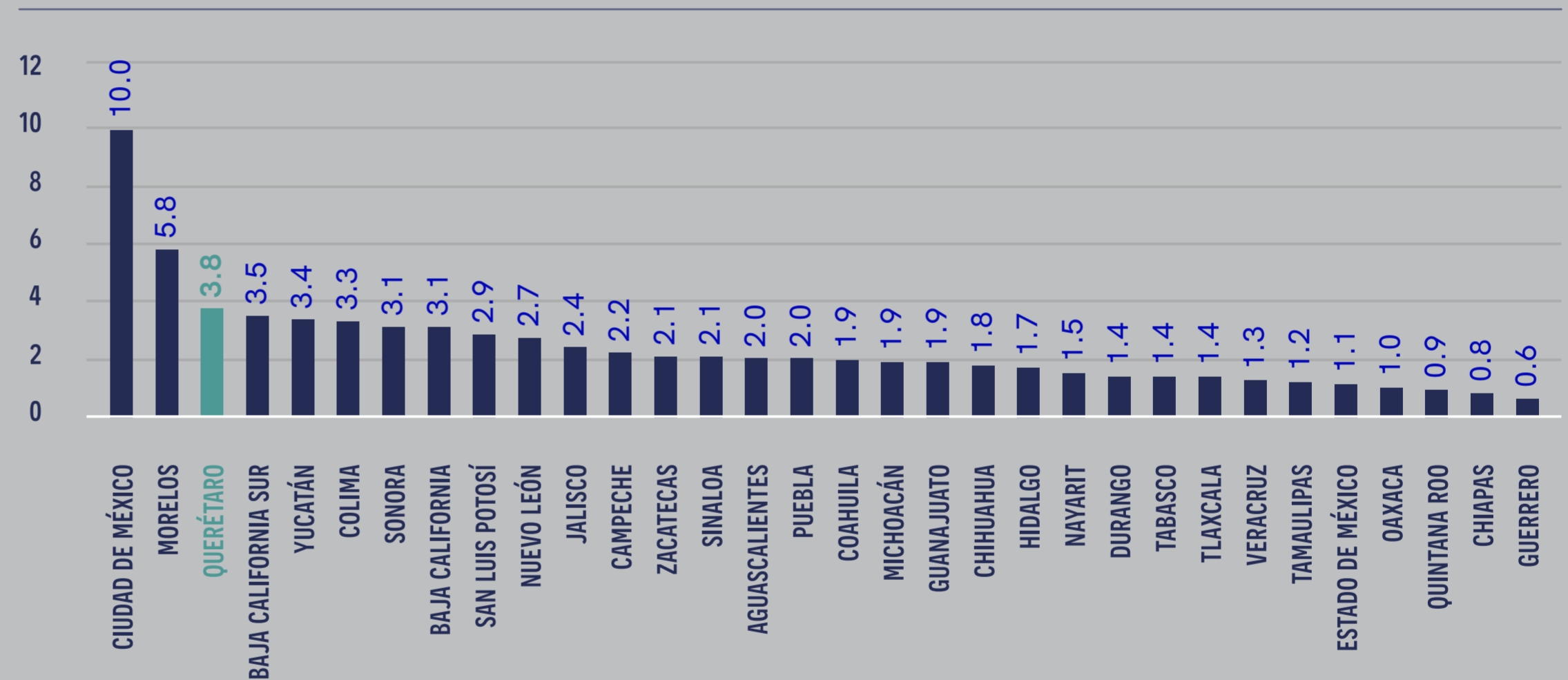
## 5.3.3

## Research, Science and Technology

According to the National Council of Humanities, Sciences and Technologies (CONAHCYT, by its acronym in Spanish), science, technology and innovation are fundamental factors for the economic and social growth of a country, since they develop the necessary elements to increase productivity, competitiveness and prosperity.

In Mexico, CONAHCYT is the entity in charge of establishing public policies in the humanities, science, technology and innovation, with the aim of strengthening scientific sovereignty and technological independence. It is a member of the National System of Researchers (SNII, by its acronym in Spanish), which recognizes the work of people dedicated to research and aims to promote and strengthen the quality of scientific and technological research.

SNII<sup>1</sup> members per 10,000 inhabitants per state (2021)



Source: Prepared by the authors with data from the National Council of Humanities, Sciences and Technologies (General Report on the State of Science, Technology and Innovation), 2024.

Note: <sup>1</sup>SNII: National System of Researchers of CONAHCYT.

During 2021, Mexico had 35,178 researchers belonging to the SNII, of which 913 were registered in the entity, a figure equivalent to 2.9%.

Querétaro ranked among the first three entities with the highest number of SNII researchers per 10,000 inhabitants.

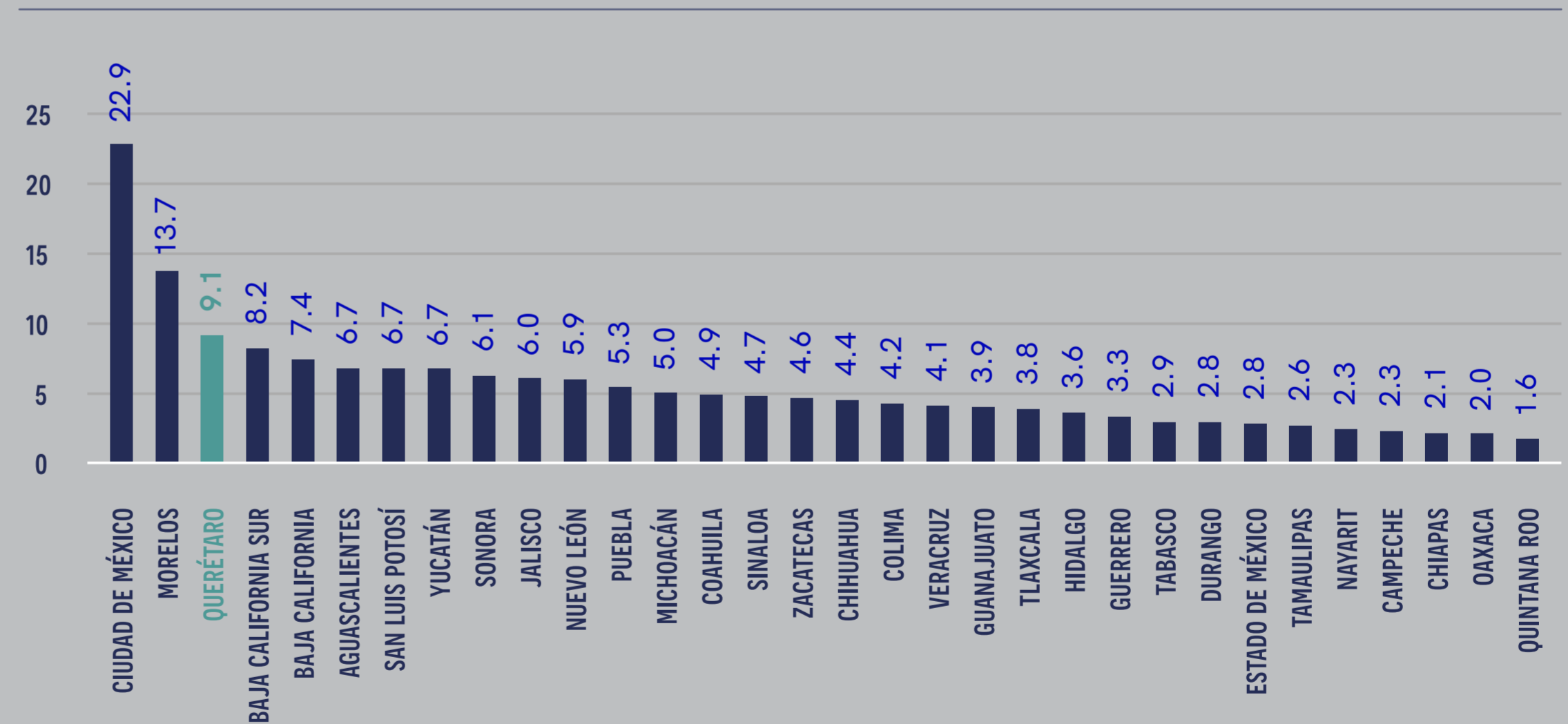




According to area of knowledge, SNII researchers are distributed as follows: 16.9% social sciences; 15.1% biology and chemistry; 14.6% physical-mathematical and earth sciences; 14.3% humanities and behavioral sciences; 14.1% engineering; 13.8% biotechnology and agricultural sciences; and 11.2% medicine and health sciences.

In order to promote research, CONAHCYT awards scholarships to graduate students; in 2021, 74,429 national scholarships were administered, of which 51,510 were current scholarships and 22,919 were new scholarships. In Querétaro, 2,214 scholarships were counted, which allows us to determine that, for every 10,000 inhabitants, 9.1 scholarships are assigned in the state.

New and current national scholarships per 10,000 inhabitants per state (2021)



Source: Prepared by the authors with data from the National Council of Humanities, Sciences and Technologies (General Report on the State of Science, Technology and Innovation), 2024.



In Querétaro, the Science and Technology Council of the State of Querétaro (CONCYTEQ, by its acronym in Spanish) is responsible for promoting and coordinating the activities of the innovation, science and technology ecosystem for the sustainable development of the state, encouraging multidisciplinary and inter-institutional work between the productive and social sectors.

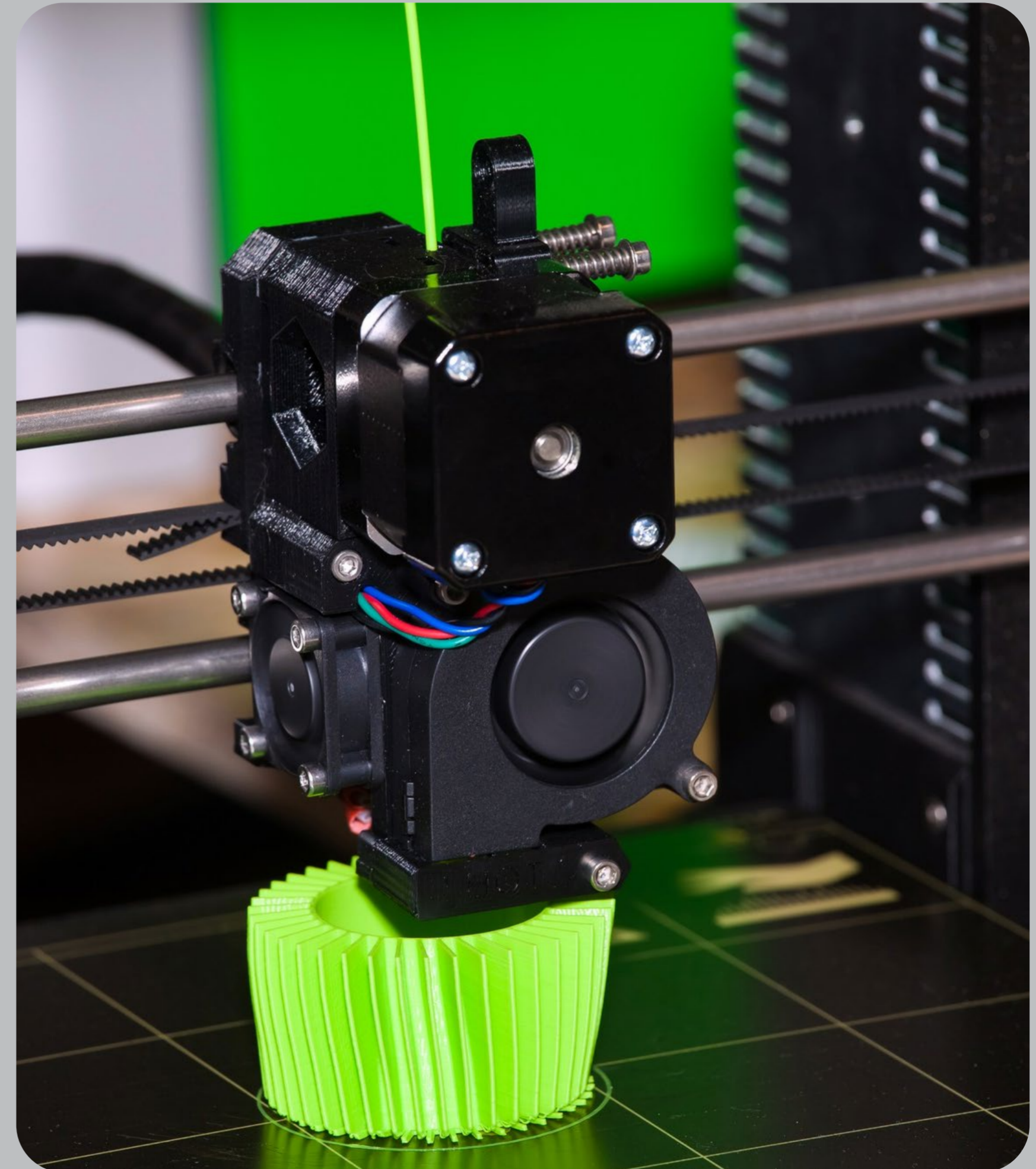
During 2023, CONCYTEQ carried out various actions in order to meet its objectives and strengthen innovation in the state, among which the following stand out:

### Actions and programs carried out by CONCYTEQ (2023)

TOPIC	NUMBER OF ACTION	BENEFICIARIES	PARTICIPATING INSTITUTIONS	BUDGET EXERCISED
Agreements entered into	191	640	N/A	N/A
Science fair	450 stands	27,544	N/A	N/A
Internship programs	N/A	28	5	\$560,000
New Scientific Talents	153	607	14	\$1,515,000
Academic mobility support	5	5	3	\$160,000
Support for Cactis projects	N/A	538	14	\$9,448,895.8
Various projects supported	35	3,120	29	\$3,405,256.4
Querétaro Science, Technology and Innovation Award 2023	103	103	103	\$820,000

Source: Prepared by the Council of Science and Technology of the State of Querétaro (CONCyTEQ by its acronym in Spanish), 2024.

Note: N.A. = Not applied



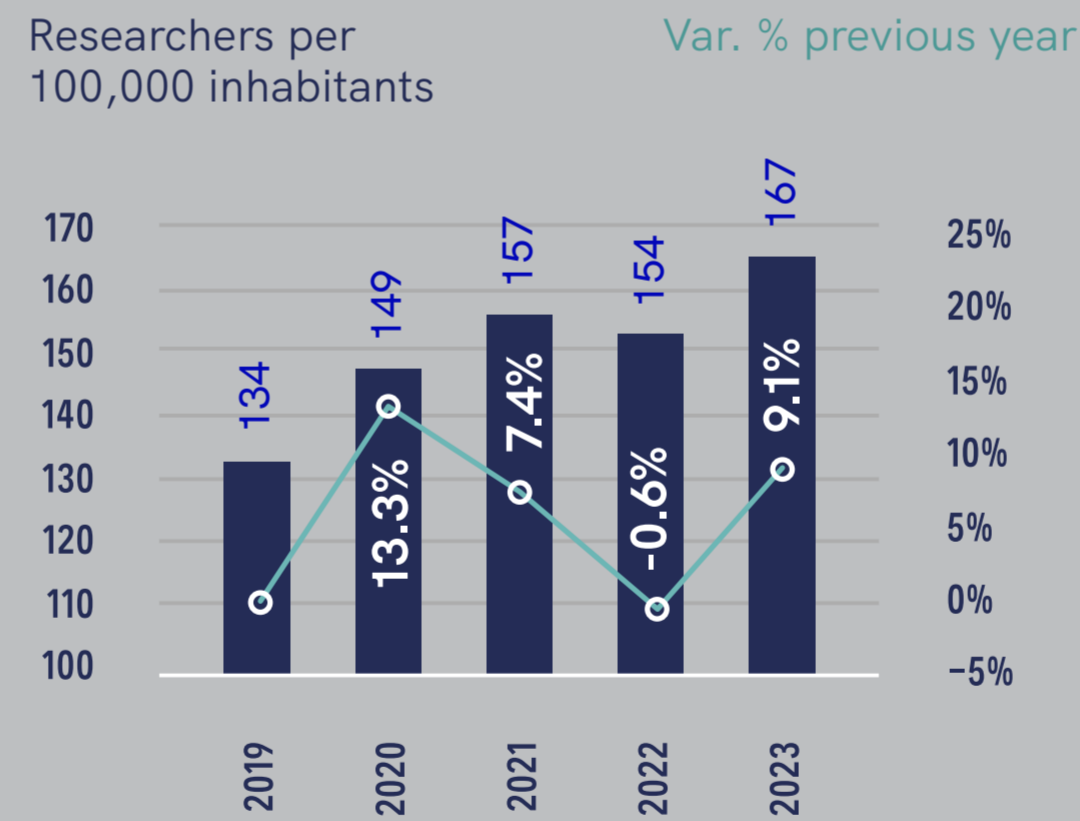


### Research centers and researchers

According to CONCYTEQ, during 2023, Querétaro had 57 research centers in which 4,150 experts participated, of which 989 were part of the National System of Researchers (SNII).

With respect to the figures reported in 2022, the total number of researchers increased by 9.1%, while those belonging to the SNII increased by 14.9%. In 2023, there were 167 researchers per 100,000 inhabitants, showing a growth trend in this indicator.

### Researchers per 100,000 inhabitants in Querétaro (2019-2023)



Source: Prepared by the authors with information from the Science and Technology Council of the State of Querétaro (CONCYTEQ by its acronym in Spanish), 2024.

Note: The percentage variation was calculated with respect to the total number of researchers registered in the entity.

For 2019, the percentage variation was not reported because the number of researchers from the previous year was not available.





## Research centers and number of researchers in Querétaro (2023)

NO.	INSTITUTION	TYPE	SNII' 2023 RESEARCHERS	TOTAL OF RESEARCHERS 2023
1	Center for Engineering and Industrial Development (CIDESI*)	CONAHCYT	44	93
2	Advanced Technology Center (CIATEQ*, A.C.)	CONAHCYT	9	177
3	Center for Research and Technological Development in Electrochemistry (CIDETEQ*, S.C.)	CONAHCYT	28	51
4	Center for Research in Geospatial Information Sciences (CENTRO GEO, QUERÉTARO UNIT)	CONAHCYT	11	11
5	Interdisciplinary Center for Research and Teaching in Technical Education (CIIDET*)	Federal	7	28
6	National Center for Animal Physiology Research (CENIDFA-INIFAP*)	Federal	15	32
7	National Metrology Center (CENAM*)	Federal	15	159
8	INAH* Center, Querétaro	Federal	1	13
9	National Institute of Forestry and Agricultural Research (INIFAP*, Querétaro)	Federal	2	7
10	Mexican Institute of Transportation (IMT*)	Federal	5	105
11	Center for Educational Research and Teacher Training (CIEFD-IMSS*)	Federal	5	39
12	CARSO Research & Development Center, CIDECA (CONDUMEX*, S.A. DE C.V.)	Private	0	284
13	Technology and Development Center (MABE, S. de R.L. de C.V.)	Private	1	465
14	Technology and Development Center (TREMEX, S.A. de C.V.)	Private	0	20
15	Advanced Turbomachinery Engineering Center (CIAT-GE IQ*)	Private	0	1,197
16	Mess Metrological Services S. de R.L. de C.V.	Private	0	5
17	Centre for Advanced Social Research, A.C. (CISAV*)	Private	0	14
18	Nucitec S.A. de C.V.	Private	1	1
19	Continental	Private	0	176
20	CINDETEC*	Private	1	1
21	National Center for Educational Research MAVIC	Private	0	11
22	Center for Research in Applied Science and Advanced Technology (CICATA-IPN*)	Higher Education	30	34
23	Center for Research and Advanced Studies (CINVESTAV-IPN*, Querétaro unit)	Higher Education	22	22
24	High Technology Unit. UNAM School of Engineering (UAT*)	Higher Education	5	8
25	Institute of Neurobiology of the UNAM, Juriquilla Campus (INB*)	Higher Education	57	58



## Research centers and number of researchers in Querétaro (2023)

NO.	INSTITUTION	TYPE	SNII <sup>1</sup> 2023 RESEARCHERS	TOTAL OF RESEARCHERS 2023
26	Center for Educational Research CIEEN* (ENEQ*)	Higher Education	1	1
27	Monterrey Institute of Technology and Higher Education (ITESM-CQ*)	Higher Education	35	35
28	Querétaro Institute of Technology (ITQ*)	Higher Education	15	33
29	Center for Applied Physics and Advanced Technology of the UNAM, Juriquilla Campus (CFATA*)	Higher Education	30	36
30	Geosciences Center of the UNAM*, Juriquilla Campus	Higher Education	50	78
31	Advanced Water Treatment Processes Research Laboratory of the Institute of Engineering, Juriquilla Campus of UNAM-LIPATA*	Higher Education	8	8
32	Technological University of Querétaro (UTEQ*)	Higher Education	15	105
33	San Juan del Río Institute of Technology (ITSJR*)	Higher Education	4	6
34	San Juan del Río Technological University (UTSJR*)	Higher Education	9	37
35	Polytechnic University of Querétaro (UPQ*)	Higher Education	27	49
36	Multidisciplinary Teaching and Research Unit of the Faculty of Sciences of the UNAM <sup>2</sup> , Juriquilla Campus (UMDI*)	Higher Education	10	13
37	Aeronautical University in Querétaro (UNAQ*)	Higher Education	4	11
38	University of Valle de Mexico (UVM*)	Higher Education	9	11
39	Juriquilla Academic Unit of the Institute of Mathematics UNAM*, C.J. (IMAT*)	Higher Education	9	11
40	Center for Teaching, Research and Extension in Animal Production in Altiplano (CEIEPAA*) Faculty of Veterinary Medicine and Animal Husbandry, UNAM*	Higher Education	3	9
41	Autonomous University of Querétaro (UAQ*)	Higher Education	486	652
42	Polytechnic University of Santa Rosa Jáuregui (UPSRJ*)	Higher Education	7	23
43	Technological University of Corregidora (UTC*)	Higher Education	4	7
44	Anahuac University, Querétaro	Higher Education	4	14
	<b>Total</b>		<b>989</b>	<b>4,150</b>

Source: Council of Science and Technology of the State of Querétaro (CONCyTEQ by its acronym in Spanish), 2024.

Note: <sup>1</sup>SNII: National System of Researchers of CONACYT.

The information on research centers in the rows number: 2, 12, 14, 18 and 20 was not updated, so it is reported with a cutoff date of 2021.

\*By its acronym in Spanish.



Throughout 2023, CONCYTEQ published 9 editions of the journal Nthe, in which a total of 83 articles were published, with the participation of 21 educational institutions or research centers. In addition, three books were published, with a total of 38 articles, with the participation of 3 educational institutions or research centers.

Of all the institutions that have researchers on their staff, the Autonomous University of Querétaro (UAQ, by its acronym in Spanish) is positioned as the second research center and the first educational institution with the largest number of researchers in the state, that is, 15.7% of the grand total and 49.1% of the SNII belong to the UAQ.

The different faculties of the UAQ develop multiple lines of research, the Faculty of Engineering concentrates 25% of the registered researchers, followed by the Faculty of Natural Sciences with 14.9%.

## Research centers and researchers in the SNII<sup>1</sup> at the Autonomous University of Querétaro (December 2023)

FACULTY/SCHOOL	TYPE	S.N.I.I. <sup>1</sup> RESEARCHERS 2023	RESEARCHERS 2023
Engineering	Higher Education	136	163
Natural Sciences	Higher Education	82	97
Chemistry	Higher Education	67	80
Political and Social Sciences	Higher Education	23	43
Philosophy	Higher Education	28	42
Law	Higher Education	28	41
Psychology	Higher Education	26	39
School of Fine Arts	Higher Education	19	34
Accounting and Administration	Higher Education	20	29
Medicine	Higher Education	19	23
Languages and Literature	Higher Education	17	22
IT	Higher Education	11	17
Nursing	Higher Education	3	12
High Schools	Higher Secondary Education	7	10
<b>Total</b>		<b>486</b>	<b>652</b>

Source: Council of Science and Technology of the State of Querétaro (CONCYTEQ by its acronym in Spanish), 2024.

Note: <sup>1</sup>SNII: National System of Researchers of CONAHCYT.

## S.N.I.I.<sup>1</sup> registered in institutions not classified as research centers (2023)

INSTITUTION	S.N.I.I. <sup>1</sup> RESEARCHERS 2023
Ministry of Culture	1
National Pedagogical University	1
<b>Total</b>	<b>2</b>

Source: Council of Science and Technology of the State of Querétaro (CONCYTEQ), 2024.

Note: <sup>1</sup>SNII: National System of Researchers of CONAHCYT.

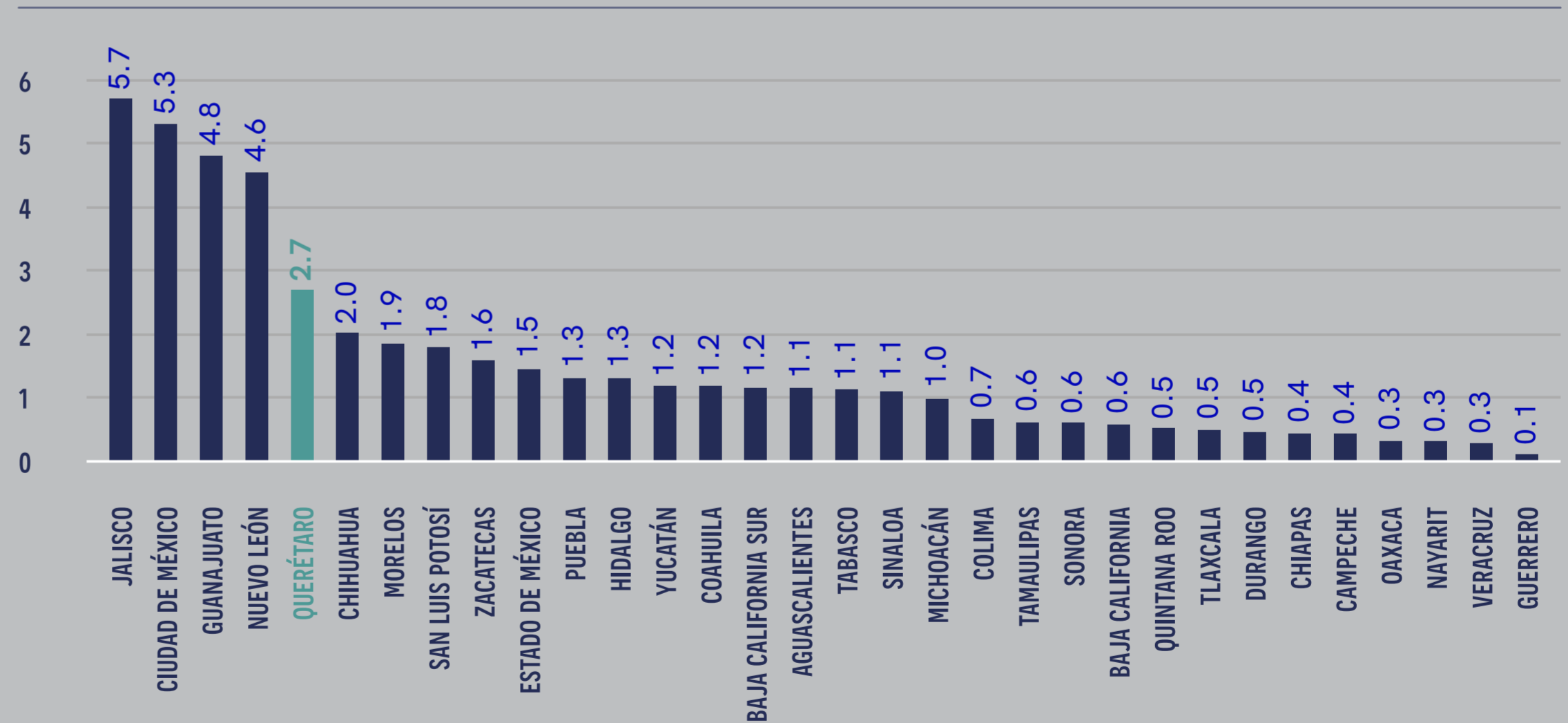


## Applications for inventions (IMPI, by its acronym in Spanish)

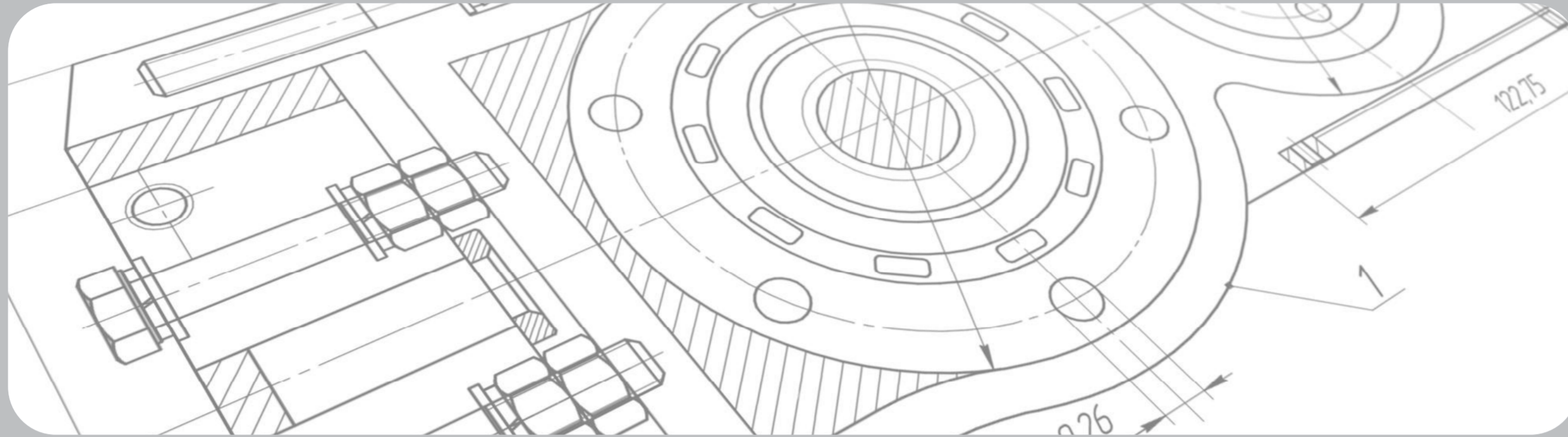
In 2023, the Mexican Institute of Industrial Property (IMPI) reported a total of 2,582 invention applications nationwide, a figure that maintains an annual variation of 0.9%. Querétaro registered 67 invention applications, which is equivalent to 2.6% of the national total; however, it ranks among the top places in terms of the number of invention applications per 100,000 inhabitants.

Of the total number of invention applications registered in the entity, 35.8% correspond to utility models, 32.8% to IC drawings and 31.3% to patents.

Invention applications per 100,000 inhabitants per state (2023)



Source: Prepared by the authors with data from the Mexican Institute of Industrial Property (IMPI in figures), 2024.

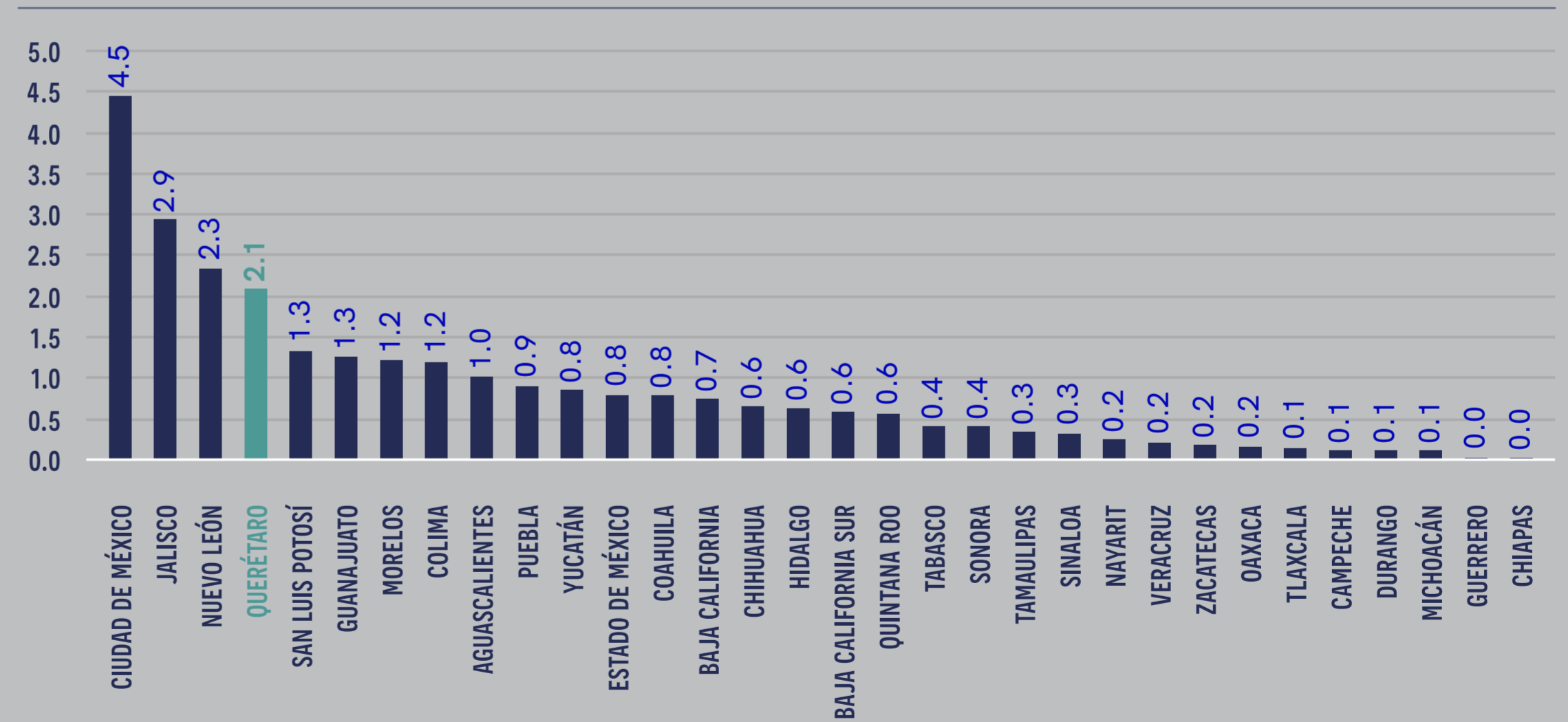


### Titles and registrations granted (IMPI)

At the national level, IMPI registered 1,448 titles and registrations granted to Mexicans, a figure that maintains an annual variation of 3.5%. In Querétaro, the figure is 52 and shows an annual growth rate of 6.1%; when evaluating the data per 100 thousand inhabitants, the state is in 4th place.

Of the total number of titles and registrations granted in the entity, 50% correspond to industrial designs, 34.6% to patents and 15.4% to utility models.

Titles and registrations granted to Mexicans per 100,000 inhabitants by state (2023)



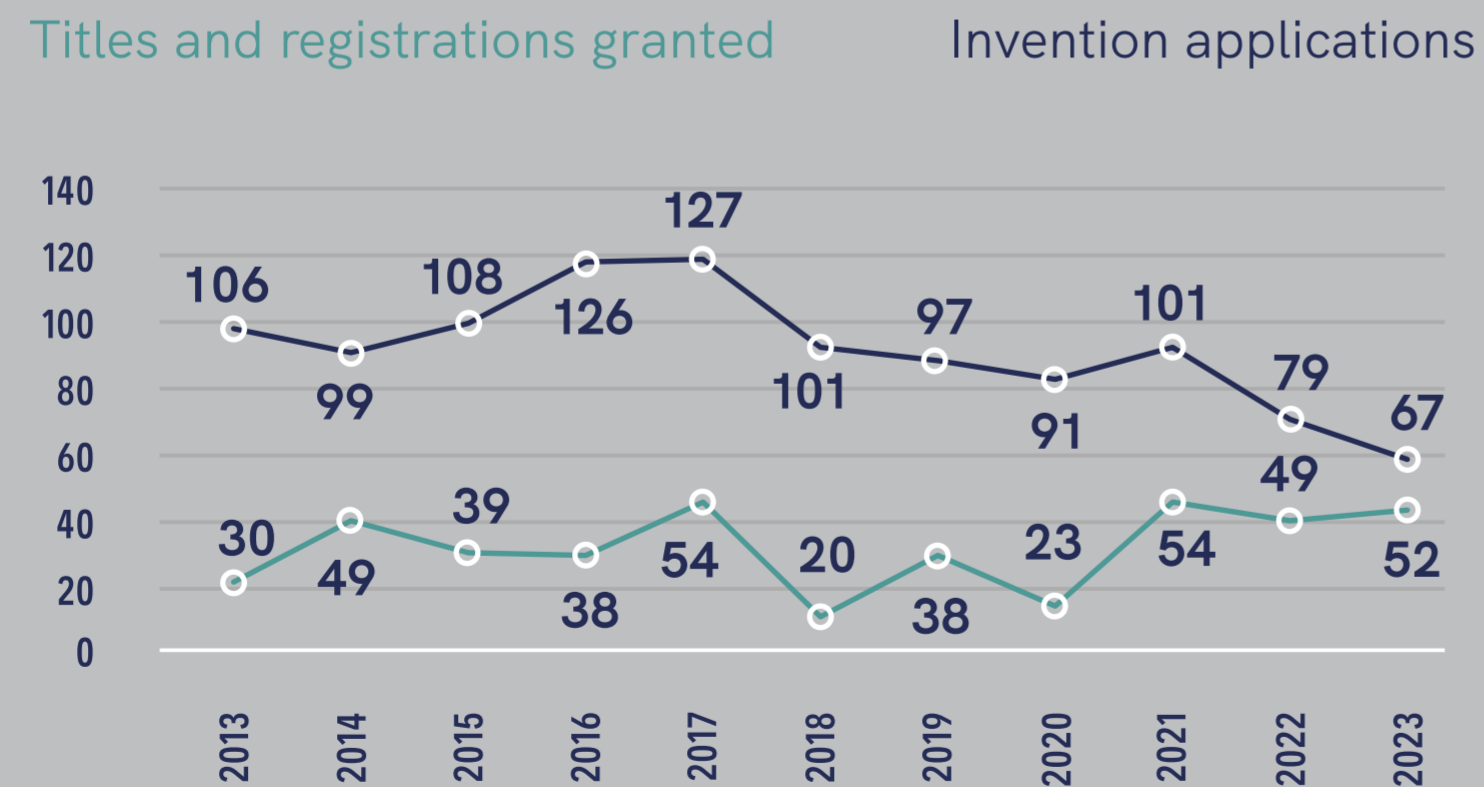
Source: Prepared by the authors with data from the Mexican Institute of Industrial Property (IMPI in figures), 2024.



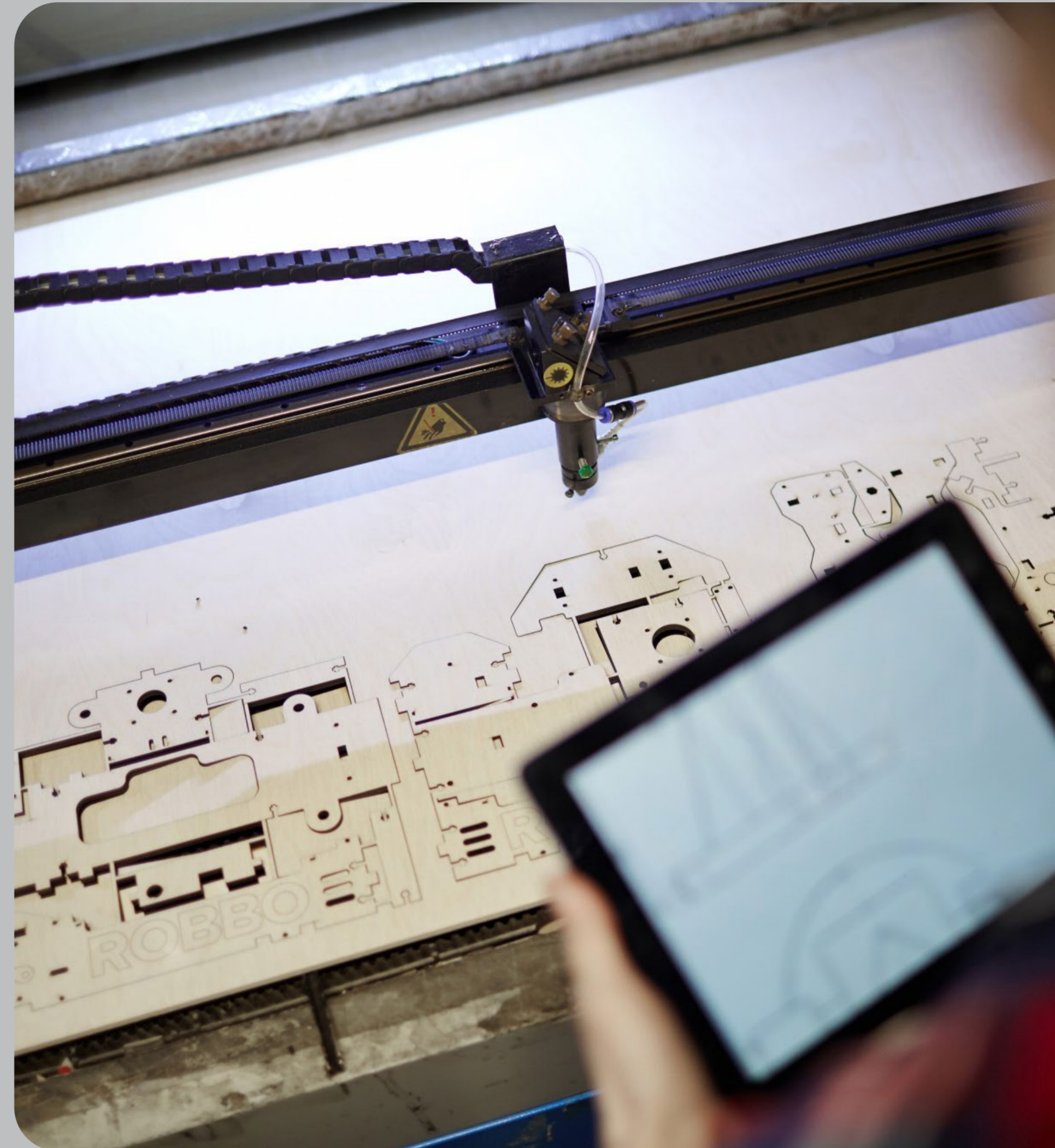
## Evolution of IMPI registrations

From 2013 to 2023, invention applications have presented a decrease of 36.8%; in the last two years, it is possible to observe a downward trend. With respect to titles and registrations granted, for the same period, these maintain a growth of 73.3%; in recent years, the values have remained close.

### Evolution of invention applications and titles and registrations granted in Querétaro (2013-2023)



Source: Prepared by the authors with data from the Mexican Institute of Industrial Property (IMPI in figures), 2024.





## 5.3.4

**Clusters**

The existence of clusters allows for economic growth, since they promote the joint development of the various companies located within them, through the generation of an environment of innovation, the specialization of the various sectors and the modernization of industries, actions that result in the creation of jobs and the improvement of practices within them.

Querétaro has a solid statewide network of clusters, made up of the aeronautical, automotive, energy, medical, plastics, logistics and wine sectors, which work together with the Ministry of Sustainable Development to strengthen the different sectors and boost the state's economy.

**Aerocluster**

By the end of 2021, it had more than 60 members from the manufacturing industry, research centers, educational institutions, and public and private organizations. It generated 8,732 jobs, 27% of them for women, in addition to providing opportunities for 403 scholarship holders.

Its sales amounted to 1.43 billion dollars, representing the highest value to date. The sector that contributed the most was maintenance, repair and operations (MRO) with 34.6%, followed by aerostructures with 28.1%.

The largest regional trading partners of the companies affiliated with the cluster were North America, with 72% of exports and 37% of imports, followed by Europe with 22% and 9%, and Brazil with 1.5% and 29%, respectively.



The cluster's key initiatives are focused on developing and strengthening the aerospace industrial fabric, connecting large companies with startups and SMEs; linking the current aerospace ecosystem in Querétaro and the region with national and international initiatives; promoting research and technology development for the benefit of the aerospace industry; fostering and promoting specialized training programs and sector studies; and finally, providing assistance, training, visibility and funding to startups and SMEs.



## Automotive cluster

It is headquartered in the Technological Park of the Instituto Tecnológico y de Estudios Superiores de Monterrey, Campus Querétaro. It has 9 committees, which are designed to identify the main needs of the automotive industry, as well as to seek solutions through collaborative schemes and linkage of the triple helix. The committees are 1) Supplier Development, 2) Environmental Sustainability, 3) Operational Excellence, 4) Human Capital, 5) Industrial Safety, 6) Property Safety, 7) Tier 2 (TR2), 8) Training, 9) Innovation.

The cluster is made up of 129 companies, of which 2 are OEMs, 47 are Tier 1 (TR1) and 47 are Tier 2. It also includes 8 research and development centers, 13 companies that provide support to the automotive industry, 2 governmental partners (SEDESU and CONCYTEQ, by its acronym in Spanish), and 10 academic institutions, including universities and higher technical institutions.



The function of the cluster is to promote the automotive sector in Querétaro, with the objective of generating a sustainable environment and fostering the development of local suppliers, through committee sessions that favor a networking ecosystem, B2B (business to business) meetings and offering growth opportunities for local companies.

Within the cluster is housed the state's Circular Economy Office, which is an important hub

for the implementation of the Circular Economy System in the region, working together with the private sector and the state government and generating more than 300 circular economy initiatives.

It is important to consider that there are more than 350 companies in this sector in Mexico, with a combined total of 80,000 direct jobs.



## Medical cluster

Clúster Queretano Médico y de la Salud, A.C. was founded in June 2014 with the mission to contribute to the well-being of society through service, innovation, quality and the adoption of best practices, recruitment, training and coordination among each of its associates.

The cluster brings together healthcare organizations, with the aim of strengthening and developing the healthcare sector in the state, improving the quality of medical care, safety and user experience.

In 2023, 5 associates (Heart Institute of Querétaro, Healthy Network, Hi-Tec Medical de Querétaro S.A. de C.V., PlayTrip and DNX) joined the list of 14 associates and government agencies, including the Secretariat of Sustainable Development and the Secretariat of Health of the State of Querétaro.

During 2023, the cluster participated in various events and meetings in order to increase its competitiveness. In addition, it signed agreements with the Medical Arbitration Commission of the State of Querétaro, the Human Rights Ombudsman of Querétaro and the Academia Nacional Mexicana de Bioética A.C (National Mexican Academy of Bioethics), Querétaro chapter, with the aim of promoting the sector through joint work with the institutions.



## Energy cluster

The Querétaro Energy Cluster is a non-profit civil association that offers competitive intelligence services and generates, stores and promotes the use of strategic business information to raise the level of competitiveness of the sector in Querétaro.

At the end of 2023, it had more than 62 associates and strategic alliances. In 2023, 3 new collaboration agreements, 27 agreement and alliance renewals, and 3 hotel chain service agreements were signed.

During the same period, various events and agreements were held to strengthen the sector and provide useful tools to its associates. Among the most important, the following stand out:

- ▶ Qro Energy International Energy Forum. Companies from 12 countries and more than 1,000 attendees participated. There were 11 panel discussions and three keynote lectures, focused on topics such as energy transition, green hydrogen, bioenergy, electromobility, among others.
- ▶ Signing of the agreement with AFOS Foundation at the Hannover Messe trade fair. Its purpose is to promote the development of talent and meet the needs of trained personnel for the industry.
- ▶ Dual Modular Training. The objective is to follow up on the project, which was developed jointly with the cluster, Siemens Mexico and the Business Alliance for Dual Education. A total of 448 people participated.





## Plastic clusters

By 2023, the cluster reached 100 Active Partners. There were 6 commissions: Circular Economy; Operational Excellence (comprising training, certification and education); Technical Committee; Raw Materials, Additives and Lubricants Committee; Machinery and Equipment; and Human Capital and Human Resources.

The main project led by the cluster was the Laboratory Network of the Plastics Cluster and Querétaro, through which 45 meetings were held with different companies, laboratories and research centers.

Among the activities carried out during 2023, the following stand out:

- ▶ Meximold 2023, participating as partners, promoters and exhibitors.
- ▶ Participation in the Commercial and Industrial Expo of the State of Querétaro 2023.
- ▶ Participation in Plastimagen as an exhibitor and as a strategic partner.
- ▶ Participation in Automotive & Aerospace Meeting 2023, Exhibitors and B2B.

Agreements were signed with universities to strengthen the Triple Helix system: 1) Technological University of Querétaro; 2) Polytechnic University of Querétaro; 3) Aeronautical University of Querétaro; and 4) Autonomous University of Querétaro. In addition, agreements were signed with the National College of Technical Professional Education and the School of Scientific and Technological Studies of the State of Querétaro.

Finally, courses and diploma courses were scheduled, among which the following stand out: diploma course on molds and injection processes; technical drawing for blueprints; basic Fanuc Robot programming and operation.





## Logistics Innovation Cluster (CILQRO, by its acronym in Spanish)

Founded in February 2018, its mission is to promote and develop the state's logistics sector, through strategic alliances, research, innovation and dissemination of key activities and services of the sector, as well as the synergy and collaboration of its members.

The cluster is made up of 91 members, including the following logistics sectors: national logistics operators (17 members), institutions (17), national shipping lines (9), consulting firms (8) and customs agencies (7).

It offers a variety of benefits to its members, including certification programs, logistics studies, logistics training and education, business linkage, development of business projects and automation of logistics indicators. In 2023, the cluster participated in forums, exhibitions and events.





## Wine cluster

Founded on April 27, 2022, the Querétaro Wine Cluster (CVQ, by its Spanish acronym) is the first of its kind in Mexico and is part of the network of clusters recognized by the State Government. Its purpose is to articulate all the institutional actors involved in Querétaro's wine industry, generating a dynamization of the entire sector. One of the CVQ's main projects is zoning, which aims to provide strategic information for new investments and the competitiveness of the sector.

Of the 69 wine projects identified in the state, the Querétaro wine cluster has 32 that stand out for their great collaborative work, the quality of their wines, their active participation in projects and promotional programs, and their participation in national and international events.



During 2023, the CVQ signed an alliance with the Medical and Health Cluster to create synergies in the Health Tourism and Wellness Tourism programs. These synergies mean that different sectors find a positive and thriving ally in Querétaro's wine industry.

Querétaro is seriously committed to supporting and consolidating its wine region, with products and services of excellent quality and constant growth that make it a strategic sector for the state's economic development.





5.4

# Industrial parks and zones

Its presence and development in the state promotes the growth of industrial activity, which is of great importance for the economic development of the state. The Ministry of Sustainable Development, through the Environmental Control Division, registered a total of 85 industrial parks and zones in 2023, representing an increase of 3.7% over 2022.

Evolution of the number of industrial parks or zones in Querétaro (2019-2023)



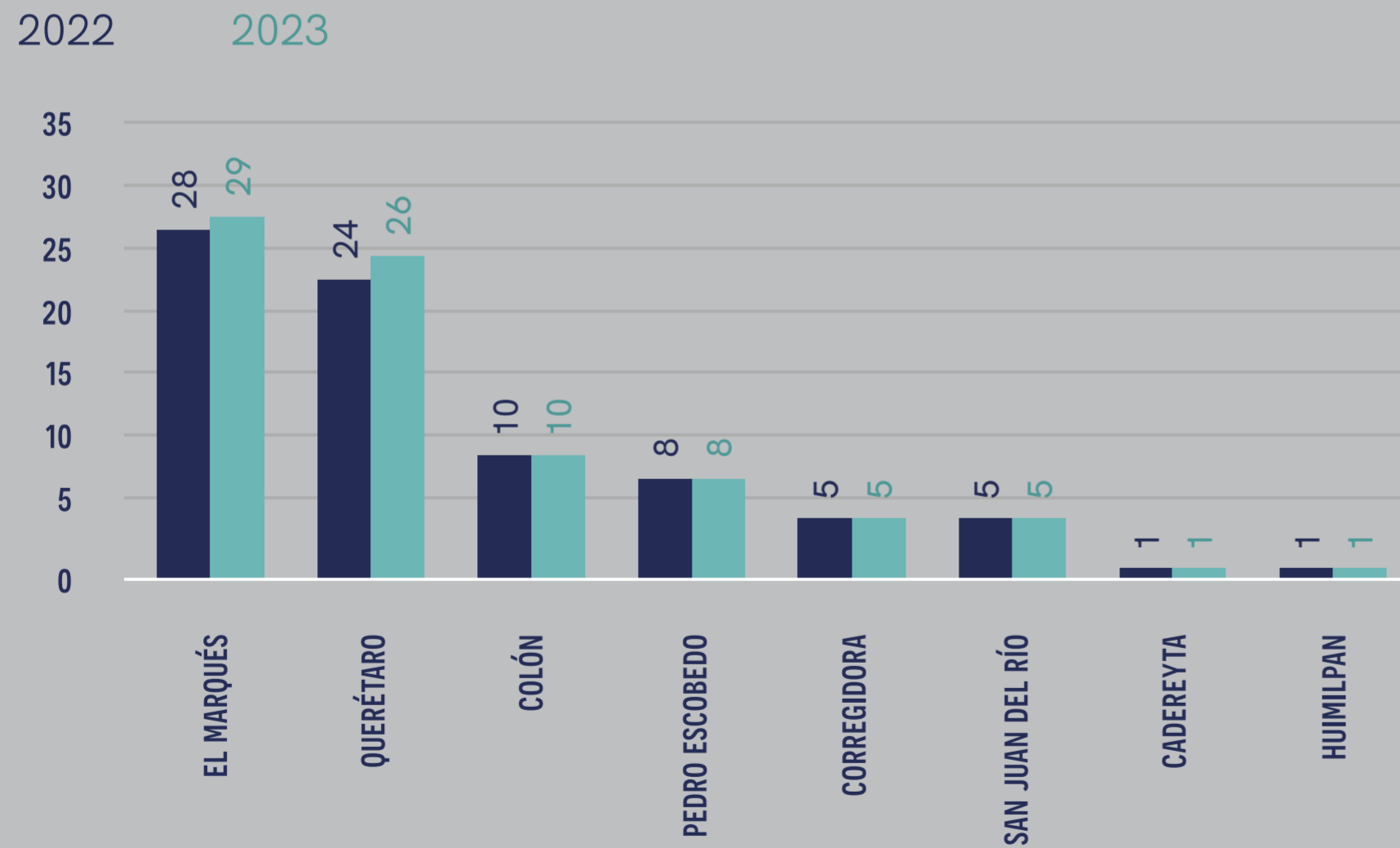
Source: Prepared by the authors with data from the Environmental Control Division (Ministry of Sustainable Development), 2024.





More than 60% of the industrial parks or industrial zones were concentrated in the municipalities of El Marqués and Querétaro, being the only two municipalities where new industrial parks or industrial zones were opened.

### Industrial parks or zones authorized by municipality in Querétaro (2022-2023)



Source: Prepared by the authors with data from the Environmental Control Division (Ministry of Sustainable Development), 2024.

### Authorized industrial parks in the state of Querétaro (2023)

NO.	PARK	MUNICIPALITY
1	Industrial Park Cadereyta	Cadereyta de Montes
2	Vesta Park Querétaro	
3	Agropark	
4	Aerotech Industrial Park	
5	Aerospace Park of Querétaro	
6	Ferroparque	
7	Industrial Point	Colón
8	Novotech Aeropuerto	
9	Querétaro Airport Industrial Park (PIA)	
10	VYNMSA PARK stage 2	
11	Parque Industrial Zulu Aeropark	
12	Balvanera Industrial Complex	
13	Industrial Park El Pueblito	
14	Industrial Park Industrialix	Corregidora
15	Business Park Balvanera	
16	Balvanera Warehouses	
17	Industrial Park El Marqués	
18	Finsa Querétaro	
19	Industrial Micropark La Noria	
20	Industrial Park O'Donnell Airport	El Marqués
21	Industrial Park Airport	
22	Industrial Park Advance Qro.	
23	La Bomba Industrial Park	



### Authorized industrial parks in the state of Querétaro (2023)

NO.	PARK	MUNICIPALITY	NO.	PARK	MUNICIPALITY	NO.	PARK	MUNICIPALITY
24	Industrial Complex P.K.Co.	El Marqués	46	Industrial Park S&MEs	Huimilpan	68	Industrial and Commercial Park Practipark	Querétaro
25	Global Park Querétaro		47	Industrial Complex Sotavento	Querétaro	69	Industrial Complex Acupark 2	
26	Industrial Park Ciudad Maderas		48	Industrial Zone San Pedrito Peñuelas		70	Micropark Querétaro II	
27	Industrial Park S&MEs		49	Vía Verte Park		71	BP Sendero	
28	Industrial Park Calamanda		50	Industrial Subdivision Benito Juárez		72	Concordia Park	
29	Arso Park		51	Industrial Park Jurica		73	Industrial Subdivision Valle de Oro	San Juan del Río
30	VYNMSA		52	Industrial Park Querétaro		74	Tierras Coloradas	
31	Villa del Marqués		53	Business Park Santa Rosa		75	New Industrial Park	
32	Prime Park Just In Time		54	Industrial Park San Isidro		76	Industrial Park Advance SJR	
33	Industrial Park Quadrum		55	Micropark P88		77	Azeropark Warehouses	Pedro Escobedo
34	Terra Park Centenario		56	Miqro1 Park		78	Industrial Complex Las Palmas	
35	Euro Park		57	Industrial Micropark Jofre Park		79	Industrial Park Elysium	
36	Puerta Querétaro		58	NAVEX Park		80	Exeter Cantera Industrial Park	
37	FRISA		59	SPM Industrial Condominium		81	Finka San Antonio Agropark	
38	Querétaro Innovation Technology Park		60	Industrial Park Buena Vista		82	Industrial Park Q2	Querétaro
39	Industrial Park Advance Conin		61	Dynamik Park		83	Saloro Business Park	
40	Industrial Complex Guadalupe La Venta		62	Eqropak		84	Industrial Park Q3	
41	Industrial Complex Las Palmas II		63	Micropark Born-Makro		85	Navetec Business Park Pedro Escobedo	
42	Bluhen Business Park		64	Industrial Park Vie Verte Querétaro II				
43	Spartek II Warehouses		65	Navetec Santa Rosa				
44	Tecnopark		66	Terrakia				
45	Nowus Park		67	Industrial Park Querétaro Sur				

Source: Prepared by the authors with data from the Environmental Control Division (Ministry of Sustainable Development), 2024.  
 Note: The green color indicates the authorized industrial parks that were integrated during 2023 to the list.



## Industrial settlements

The Ministry of Sustainable Development, in conjunction with municipal, state and federal agencies, through the “Induction Form”, evaluates and resolves on the establishment of new industries, as well as the expansion, regularization, relocation, change of corporate name and ratification of those already established, based on the Industrial Law of the State of Querétaro and other provisions in force.

Throughout 2023, 200 Induction Forms were processed. Regularization procedures were the most issued, representing 32% of the total.

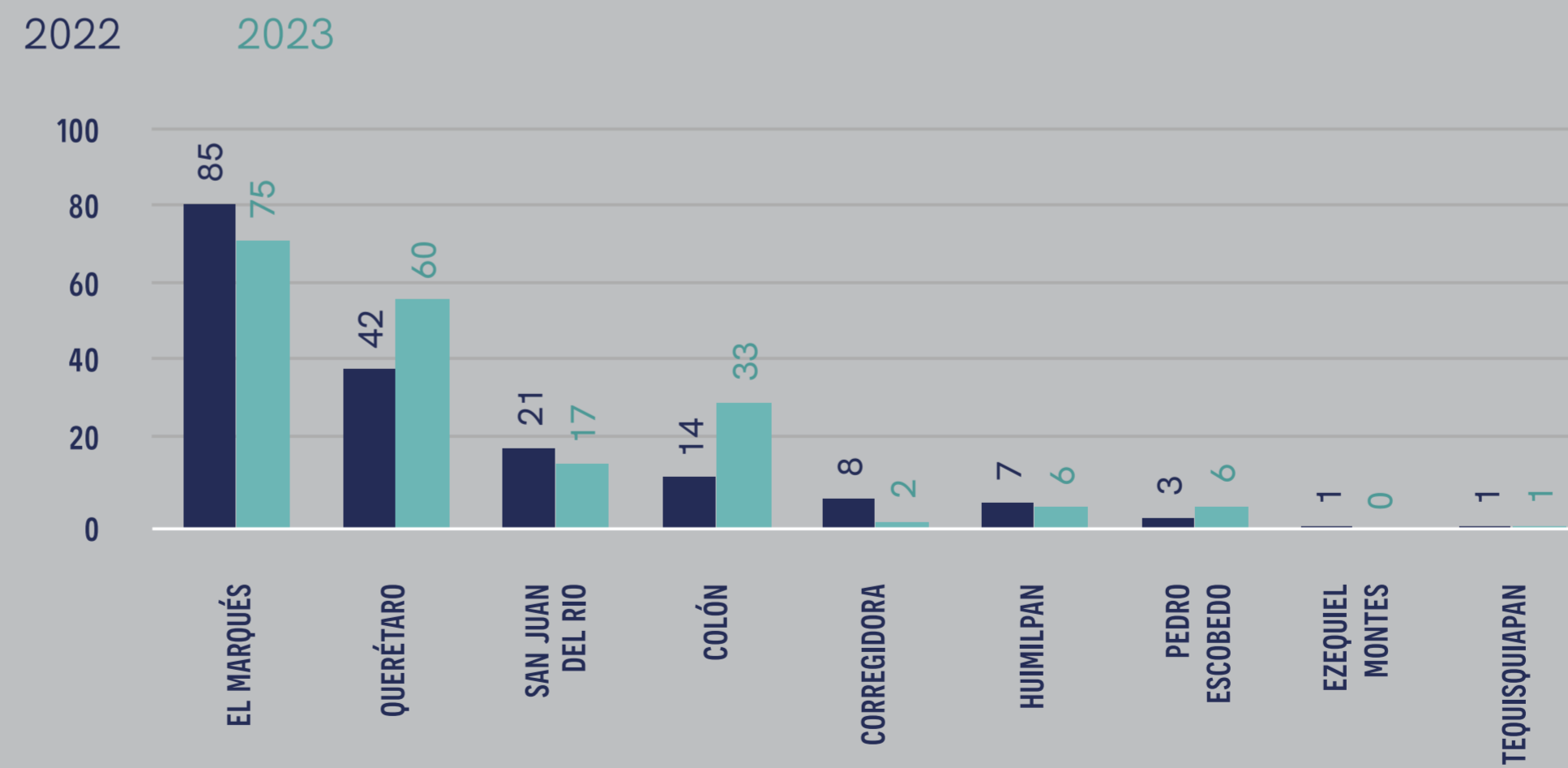
### Induction Form issued (2023)

TYPE	PROCEDURES
Regularization	64
Installation	40
Expansion	20
Confirmation	56
Change of business name	16
Relocation	4
<b>Total</b>	<b>200</b>

Source: Prepared by the authors with data from the Environmental Control Division (Ministry of Sustainable Development), 2024.

The procedures were carried out by companies located in 8 of the 18 municipalities of the entity during 2023. Of the total, 37.5% were carried out by companies located in the municipality of El Marqués, followed by Querétaro with 30%.

### Induction Forms issued by municipality (2022-2023)



Source: Prepared by the authors with data from the Environmental Control Division (Ministry of Sustainable Development), 2024.



The one-stop shop for procedures seeks to support new and existing companies in Querétaro by linking them with various institutions to facilitate the management and resolution of their procedures. During 2023, 73 requests were handled, related to permits, licenses, authorizations in municipalities, electric power, among others.

### One-stop shop for procedures (2023)

AGENCIES	APPLICATIONS
State Energy Agency Querétaro	12
Municipalities	9
Federal Electricity Commission	4
Ministry of Finance	3
Ministry of Labor	9
Land registry	4
State Water Commission	3
Ministry of Sustainable Development	18
Others	11
<b>Total</b>	<b>73</b>

Source: Prepared by the authors with information from the Industrial Development Department (Ministry of Sustainable Development), 2024.

In 2023, 52 projects were completed in different municipalities of Querétaro in the aeronautical, automotive, food and beverage, household appliances, information and communication technologies, medical and plastics sectors. The number represented an increase of 10.6% over 2022.

### Projects completed (2023)

MUNICIPALITY	AMOUNT OF PROJECTS
Querétaro	25
El Marqués	14
Colón	7
Corregidora	1
Pedro Escobedo	1
To be defined	4
<b>Total</b>	<b>52</b>

Source: Prepared by the authors with information from the Industrial Development Department (Ministry of Sustainable Development), 2024.



## 5.5

# Environmental impact

## 5.5.1

## Environmental impact assessment

It is the responsibility of the Ministry of Sustainable Development, through the Environmental Control Division, to evaluate and, if necessary, discard projects that may cause ecological imbalances by exceeding the limits and conditions set forth in the applicable standards, derived from the execution, suspension, expansion, modification, demolition or dismantling of works or activities.





In 2023, 723 procedures and 105 environmental impact studies were evaluated.

The evaluation process is carried out under the following modalities:

- ▶ Preventive Environmental Impact Report
- ▶ Environmental Impact Statement
- ▶ Induction Form.

## Environmental procedures

In addition to the environmental impact assessment, the Environmental Control Division carries out various procedures through the Online Procedures Platform, which is a digital tool that brings information to users and facilitates the process of obtaining environmental impact authorizations.

During 2023, 28,757 procedures were carried out, 68.2% more than in 2022. Vehicle verification authorizations accounted for 73.2% of the procedures.

## Number of procedures handled by the Environmental Control Division (2023)

TYPE OF PROCEDURE	PROCEDURES HANDLED
Vehicle verification authorizations	21,045
Proof of Verification Certificate Issuance	4,962
Annual Pollutant Release and Transfer Register Report	772
Registration, modification and renewal of the Register of Environmental Service Providers in Waste Matters.	488
Authorization of Industrial Settlements	221
Issuance of Vehicle Verification Certificate and Hologram Replacement	213
Registration or update of the Special Handling Waste Management Plan.	175
State Environmental License	168
Material bank exploitation license	157
Environmental Impact Authorization	148
Authorization for the Integral Management of Special Handling Waste	113
Registration or endorsement to the Registry of Environmental Service Providers.	110
Controlled Shooting Bench License	85
Open Burning Permit	75
Registration or renewal of the Registry of Environmental Service Providers in the field of Vehicle Verification.	15
Vehicle verification extensions	6
Environmental risk study	4
<b>Total</b>	<b>28,757</b>

Source: Prepared by the authors with data from the Environmental Control Division (Ministry of Sustainable Development), 2024.



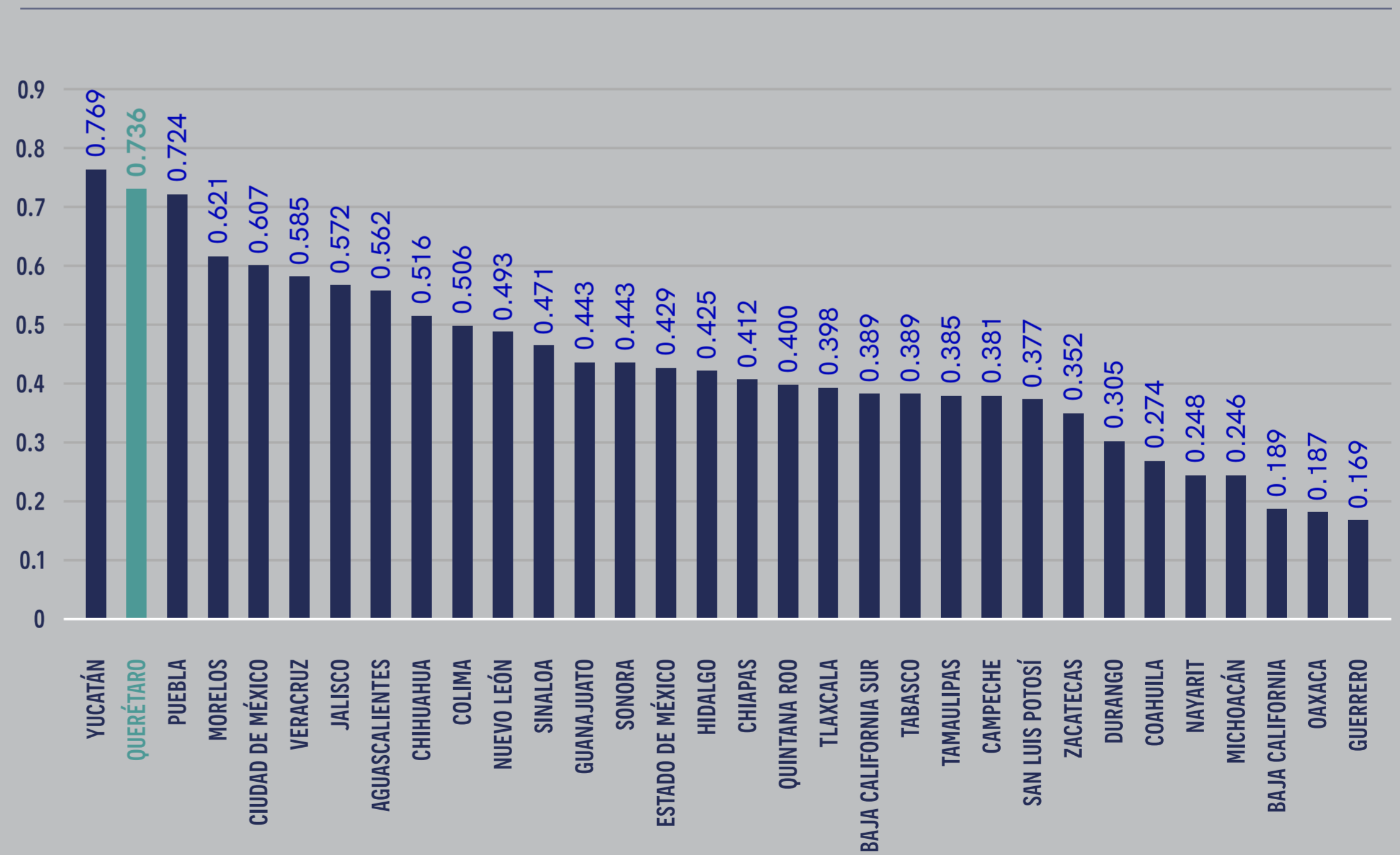
5.6

# Regulatory Improvement

The regulatory improvement policy is focused on placing individuals at the center of public management through the generation of clear rules, procedures and efficient services, aimed at obtaining the greatest possible value from available resources, stimulating investment, innovation, confidence in the economy, productivity and efficiency in favor of the growth and general welfare of society.

Regulatory improvement tools represent the diligence of public policies in the entity, generating a direct impact on the well-being of the citizens.

Results of the Progress Indicator of the National Strategy for Regulatory Improvement (2022)



Source: Own elaboration with data from the National Regulatory Improvement System, 2024.





Ten years after the creation of the Regulatory Improvement Commission of the State of Querétaro (CMER, by its Spanish acronym), today it stands out for developing efficient public policies to generate and implement clear rules, regulations, procedures and simplified services.

During 2023, the CMER trained 1,063 public servants in the implementation of the regulatory improvement tools provided for in the State Law, General Law and National Strategy for Regulatory Improvement.

Through the Progress Indicator of the National Strategy for Regulatory Improvement (IAENMR, by its Spanish acronym), in 2022 Querétaro was positioned as the second best performing entity, thus guaranteeing the achievement of the goals, objectives and lines of action established in the strategy, issued by the National Commission for Regulatory Improvement.

Of the achievements in terms of regulatory improvement attained by the state of Querétaro and its municipalities in 2023, the following stand out:

1. Through CMER's management and accompaniment, 50% of the 18 municipalities in the state participated in the IAENMR. These municipalities were Querétaro, Corregidora, El Marqués, Jalpan, Colón, Huimilpan, Amealco, Ezequiel Montes and San Juan del Río.
2. In April 2023, CONAMER, through the CMER, granted recognition to Jalpan de Serra, Pinal de Amoles, El Marqués and San Juan del Río for achieving certification in the SARE and PROSARE (Rapid Business Start-up System), with the aim of focusing efforts to facilitate the procedures for the construction and implementation of rapid business start-ups.





## 5.7

# Moody's and S&P Credit Ratings

## Moody's

According to the latest report published by Moody's Local on May 30, 2023, Querétaro maintains an "AAA.mx" credit profile (strongest credit quality compared to other local entities and transactions), demonstrating strong management and internal governance practices, low levels of indebtedness and a high level of liquidity.

### Credit strengths:

- ▶ High own revenues supported by a dynamic regional economy.
- ▶ Strong governance practices and solid operating performance.
- ▶ Low level of debt and strong liquidity.

### Credit challenges:

- ▶ High pension liabilities.

Due to the stable outlook for the state, no downgrade of the rating is expected.

## Standard and Poor's (S&P)

According to a report published on September 29, 2023 by Standard and Poor's, Querétaro's long-term issuer credit rating on a national scale was upgraded from "mxAA+" to "mxAAA", making it the first Mexican entity to achieve the highest rating on a national scale. On the other hand, the issuer credit rating of "BBB" on a global scale was confirmed for the entity.

The report highlights the state's very dynamic and diversified economy, along with its experienced financial management under several administrations, consistently strong fiscal performance and important measures to boost tax revenues in recent years.

It is also proposed that the state economy will be driven by private investment and favored by nearshoring trends.



## 6

## Tertiary Sector

Commerce, educational services, health, banking and financial instruments, transportation and communications are activities that make up the tertiary sector, which is the largest contributor to the state's GDP, in addition to accounting for more than half of the insured workers.



## 6 Tertiary Sector

### 6.1 Commercial and service development

6.1.1 Gross Domestic Product (GDP) of the tertiary sector

6.1.2 Tertiary sector employment

### 6.2 Commerce in Querétaro

6.2.1 Domestic commerce

6.2.2 Foreign commerce

### 6.3 Foreign Direct Investment (FDI)

6.3.1 Foreign Investment in Mexico

6.3.2 Foreign Investment in the state

### 6.4 Services

6.4.1 Monthly Survey of Services (EMS, by its acronym in Spanish)

6.4.2 Transportation, post and storage

6.4.3 Finance and insurance services

6.4.4 Real estate and rental services

### 6.5 Micro, small and medium-sized enterprises (MSMEs)

### 6.6 Support and promotion of companies

6.6.1. Direction of Support to SMEs

### 6.7 Directory of chambers and associations of the sector

# TERTIARY SECTOR

49.6%  
OF THE STATE'S GDP

1,107.4  
MUSD FDI (2023)

U.S.A.  
MAIN INVESTOR

360,468  
PEOPLE FORMALLY WORKING  
IN THE TERTIARY SECTOR

94,137  
REGISTERED BUSINESSES  
BY THE DENUE\*  
\*BY ITS ACRONYM IN SPANISH

9%  
EXPORTS GROWTH  
IN 2023

89.6%  
OF MSMES ARE DEDICATED  
TO COMMERCE AND SERVICES



6.1

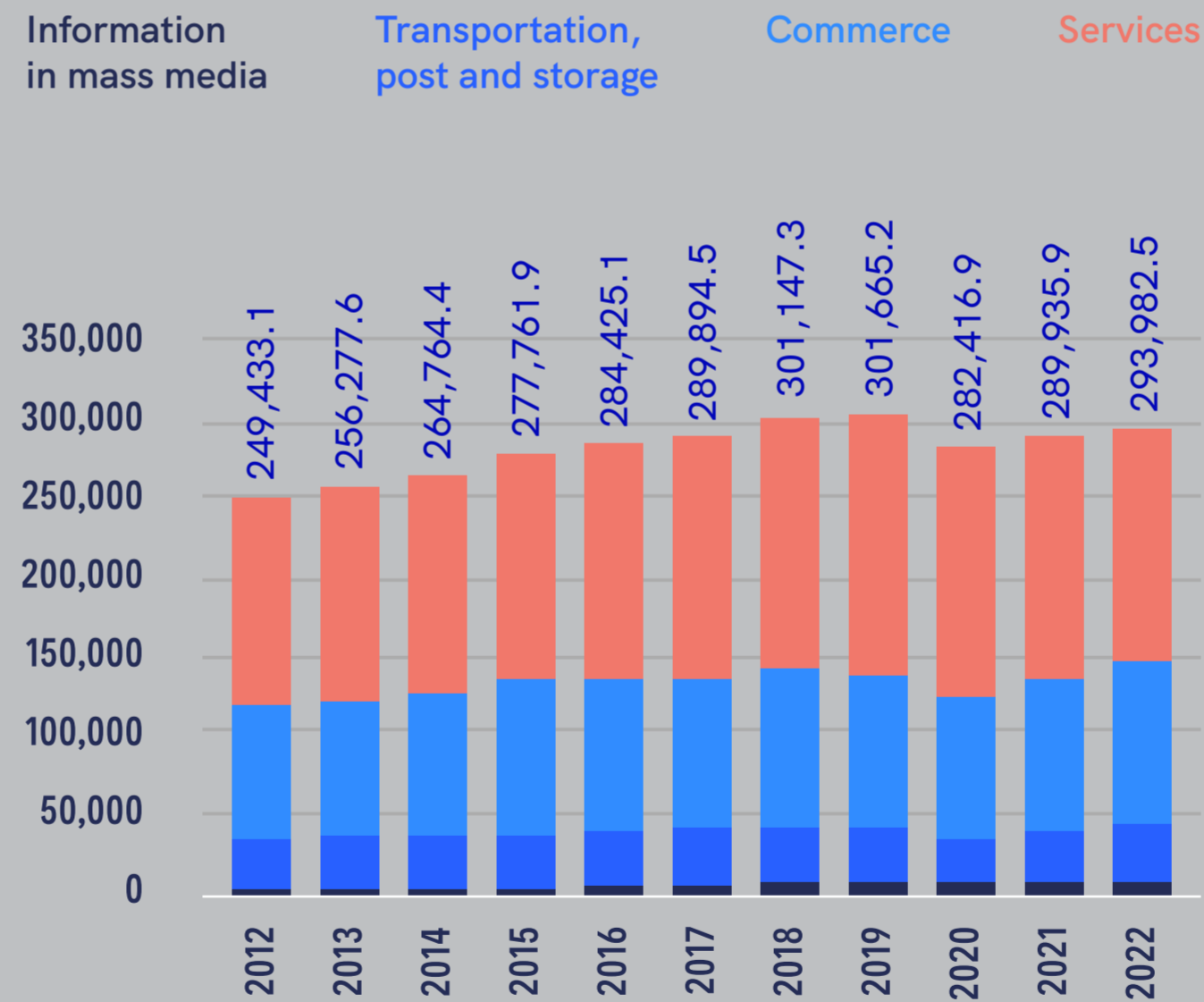
# Commercial and service development

6.1.1

## Gross Domestic Product (GDP) of the tertiary sector

During 2022, MXN \$293,982.5 MM at 2018 prices were reported within GDP, representing 49.6% of the total. The amount maintained an annual variation of 1.4%.

Gross Domestic Product (GDP) of tertiary activity by sector in Querétaro (2012-2022)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (GDP by state [PIBE]; 2018 base), 2024. Note: Values are expressed in millions of pesos at 2018 prices.

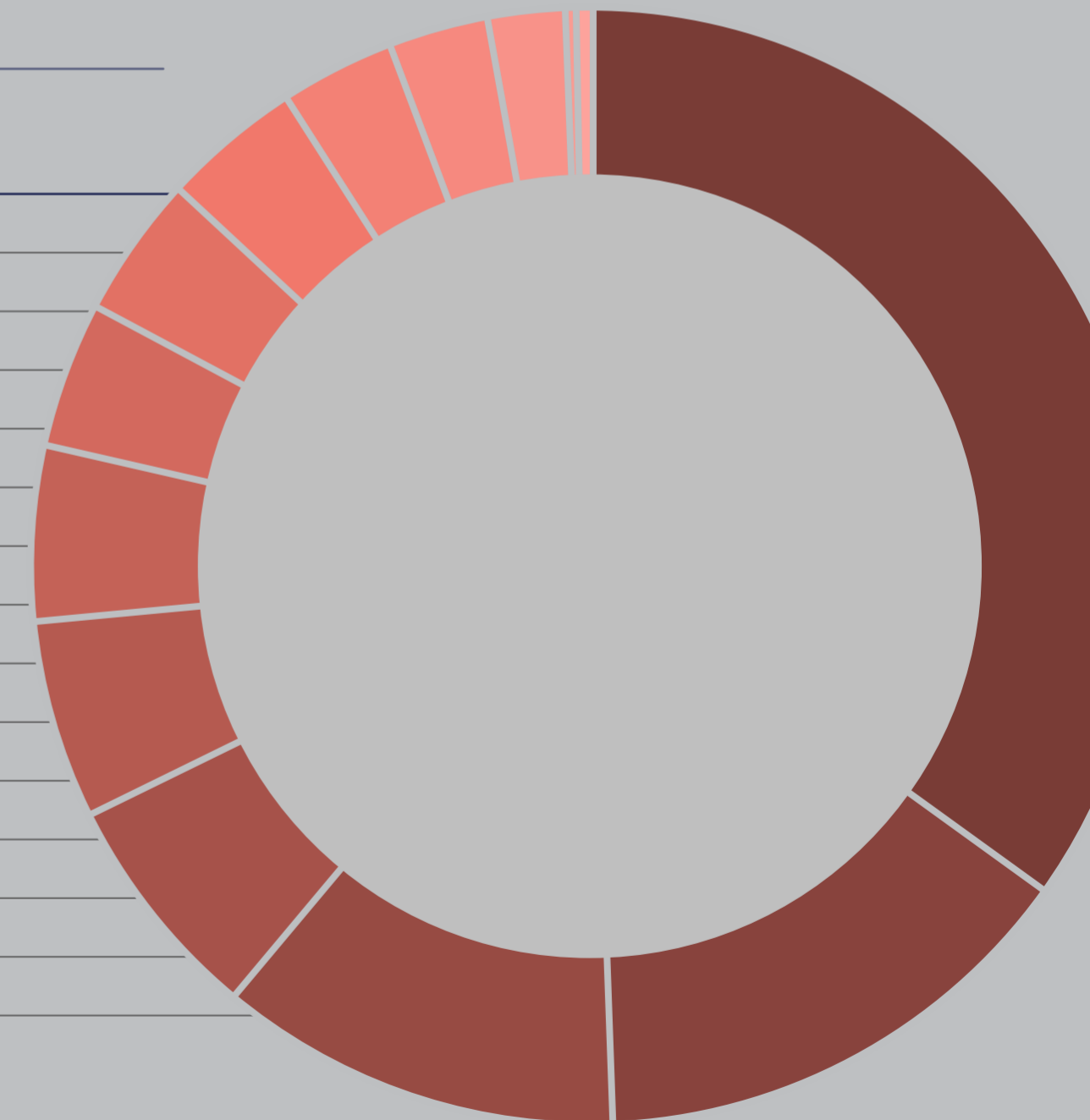




Of the total value of tertiary activity, services accounted for 50.1% (MXN \$147,170.9 MM), followed by commerce with 35% (MXN \$102,785.3 MM), transportation, post and storage with 11.7% (MXN \$34,265.4 MM) and mass media information with 3.3% (MXN \$9,760.9 MM).

### Distribution of tertiary activity GDP by sector in Querétaro (2022)

SECTOR	DISTRIBUTION	VAR. % (2022-2021)
Commerce	35%	7%
Real estate services and rental of movable and intangible assets	14.5%	2.6%
Transportation, post and storage	11.7%	12.8%
Finance and insurance services	6.7%	5.7%
Education services	5.8%	3.8%
Temporary accommodation services and food and beverage preparation services	5.1%	40%
Legislative, governmental, law enforcement and international organization activities	4.2%	2.1%
Professional, scientific and technical services	4.1%	0.3%
Health and social assistance services	4%	2.9%
Information in mass media	3.3%	2.4%
Other services except governmental activities	2.9%	5.7%
Business support services and waste and residue management and remediation services	2.2%	-69.8%
Cultural and sporting entertainment and other recreational services	0.3%	42.1%
Corporate	0.3%	10.8%



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (GDP by state [PIBE]; 2018 base), 2024.



### 6.1.2

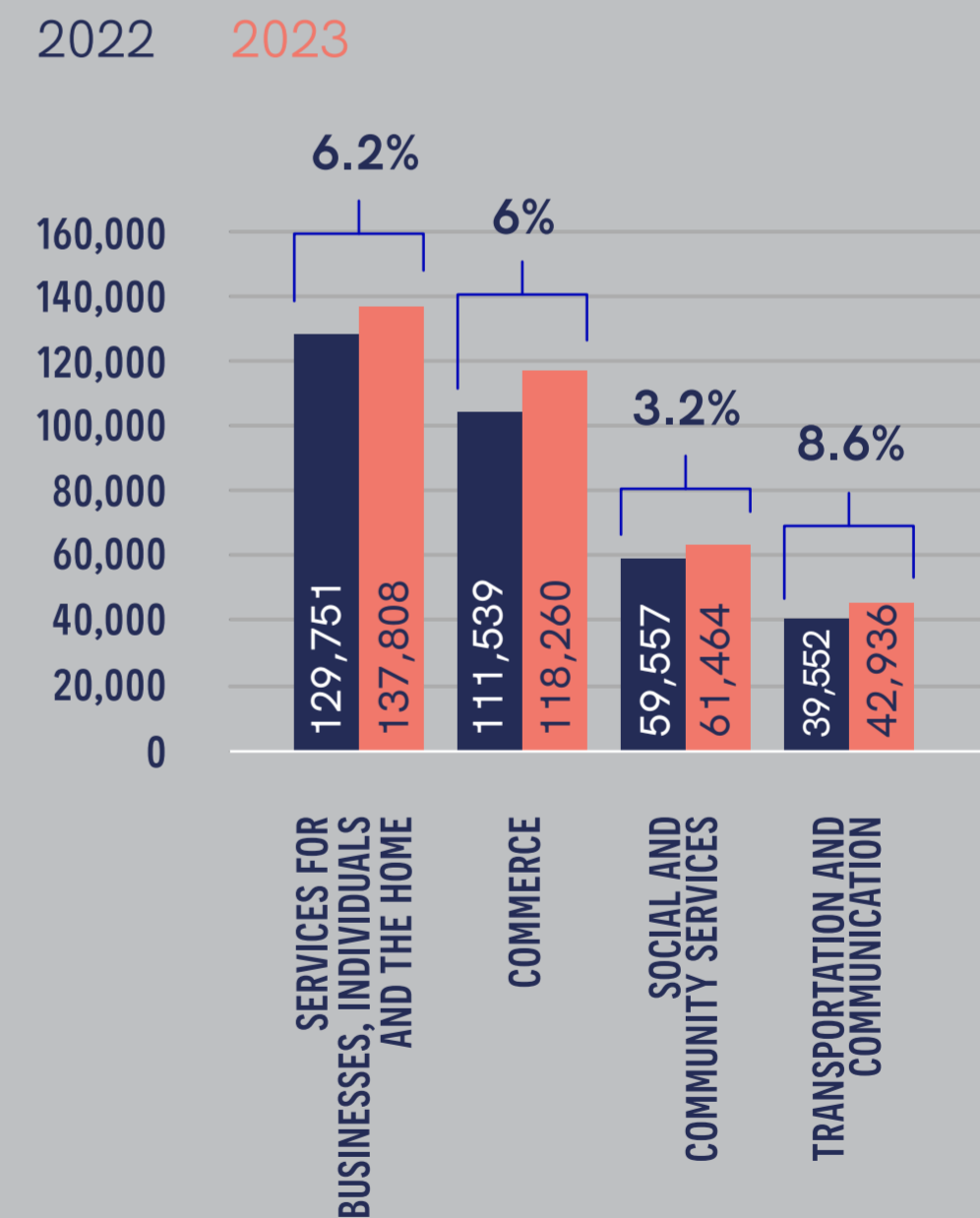
## Tertiary sector employment

In December 2023, the Mexican Social Security Institute (IMSS) counted 360,468 people formally working in the tertiary sector, 5.9% higher than the number reported in 2022, being 44.1% women and 55.9% men.

The average salary remained at \$540.48 pesos for women and \$639.91 for men.

Of the total number of jobs in this sector nationwide (7,364,896), Querétaro accounted for 4.9%.

### Jobs in the tertiary sector (December 2022-2023)



Source: Prepared by the authors with data from the Mexican Social Security Institute (Dynamic query, jobs by economic sector), 2024.





6.2

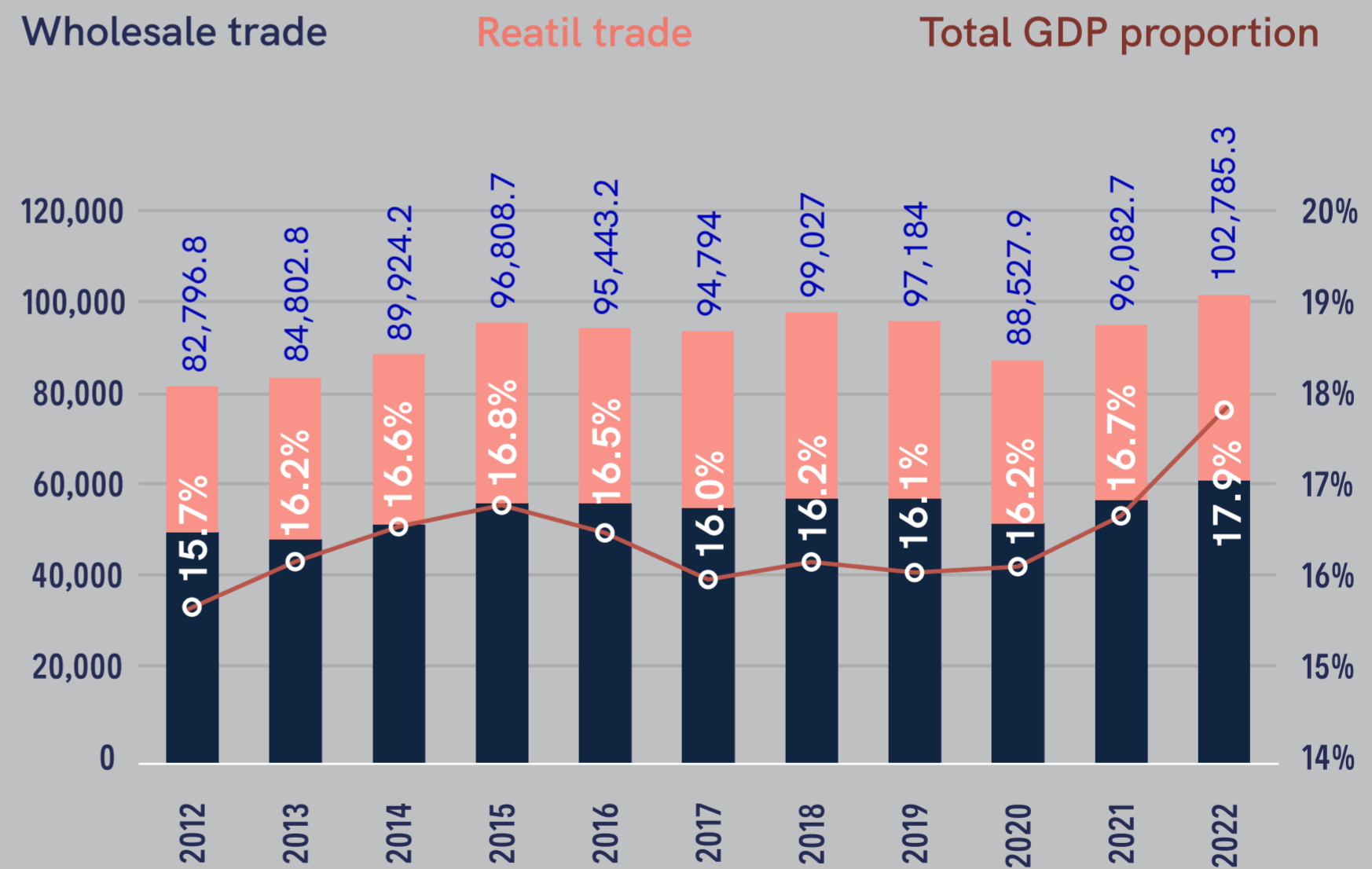
# Commerce in Querétaro

6.2.1

## Domestic commerce

During 2022, Commerce reported 102,785.3 million pesos at 2018 prices within the state's GDP, a figure that represents 17.9% of the total and 35% of that reported by the tertiary sector. The amount maintained an annual variation of 7%.

### Gross Domestic Product of Commerce in Querétaro (2012-2022)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (GDP by state [PIBE]; 2018 base), 2024.  
Note: Figures are expressed in millions of pesos (MXN MM) at 2018 prices.



In December 2023, the Mexican Social Security Institute (IMSS, by its acronym in Spanish) counted 118,260 people working formally in commercial activities, 6% more than in 2022, 41.8% of whom were women and 58.2% men. The average salary remained at \$453.59 pesos for women and \$573.39 for men. Of the total number of jobs in this sector nationwide (4,617,863), Querétaro accounted for 2.6%.

According to the National Statistical Directory of Economic Units (DENUE, by its acronym in Spanish), the state has 41,831 dedicated to commerce, 94.9% of which are micro-enterprises. The units in this sector represent 43.7% of the total number of establishments in the state and 1.7% of establishments dedicated to commerce nationwide.

### Distribution of economic units engaged in commerce by size in Querétaro (2023)

SIZE	ESTABLISHMENTS	DISTRIBUTION
Micro	39,696	94.9%
Small	1,508	3.6%
Medium	492	1.2%
Big	135	0.3%
<b>Total</b>	<b>41,831</b>	<b>100%</b>

Source: Prepared by the authors with data from the National Institute of Statistics and Geography (National Statistical Directory of Economic Units), 2024.



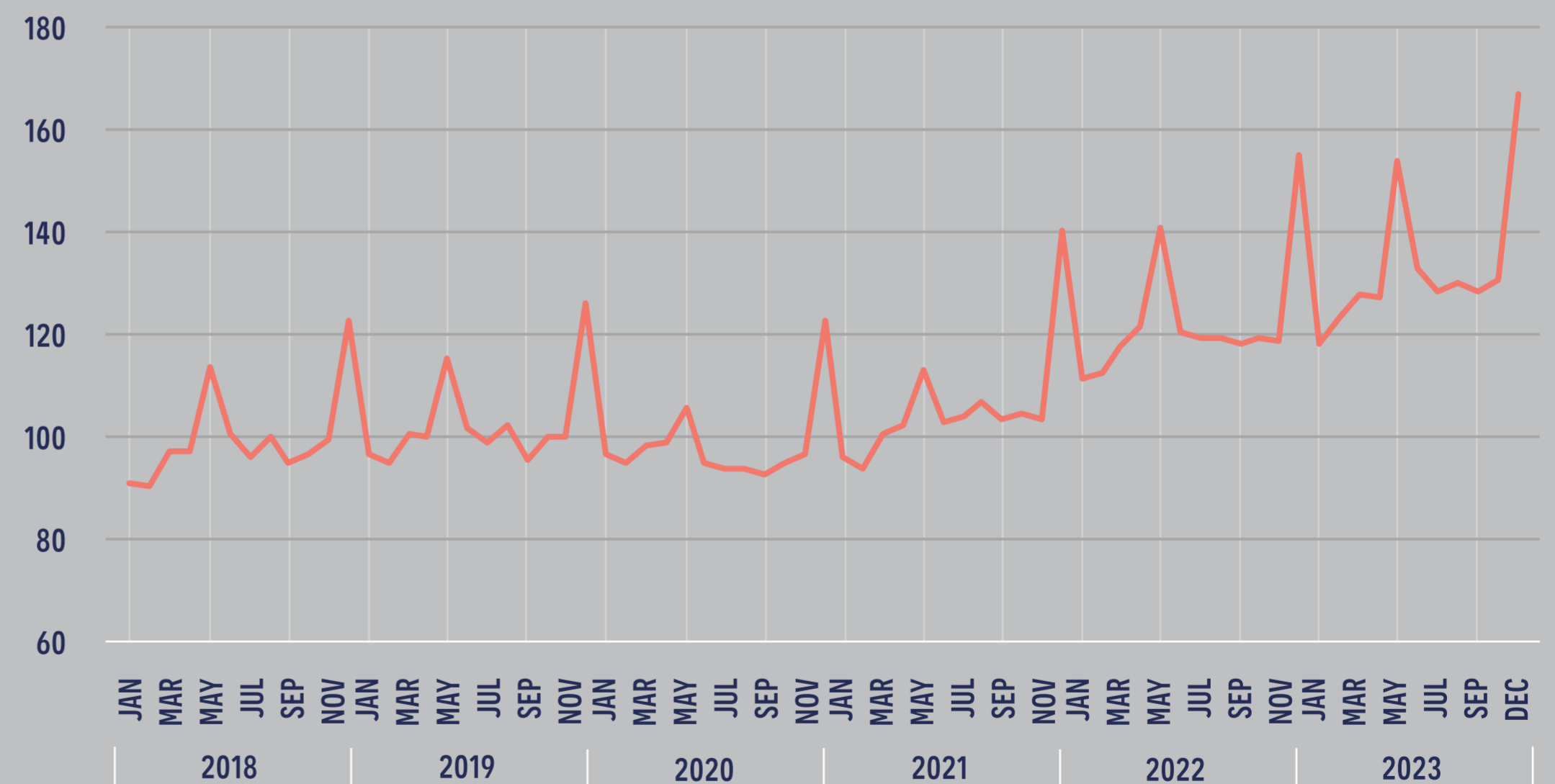
### Wholesale trade

In 2022, wholesale trade contributed 60.6% (MXN \$62,290.5 MM) to the total trade GDP, the amount reported an annual variation of 7.9%.

The Monthly Survey of Commercial Companies (EMEC, by its acronym in Spanish) shows the dynamics and evolution of Mexico's domestic trade in the short term. Total compensation is an indicator reported in the survey and is expressed as an index.

During December 2023, total compensation reported an index of 167.2, which represents an annual variation of -7.2%.

Total compensations of wholesale trade in Querétaro (2018-2023)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Monthly Survey of Commercial Companies [2018 series]), 2024.  
Note: Base index 2018 = 100.

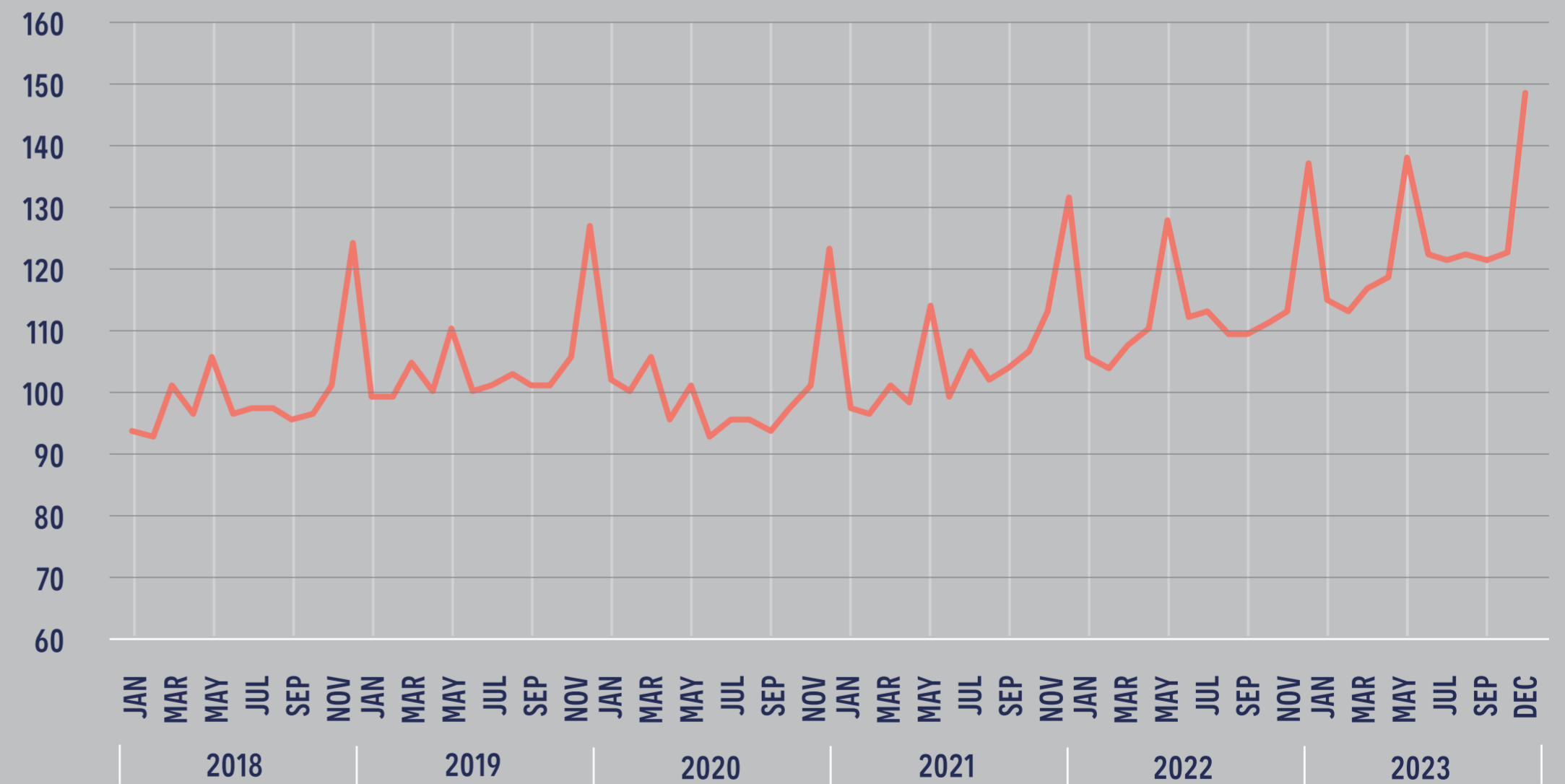


### Retail trade

In 2022, this sector contributed 39.4% (MXN \$40,494.8 MM) to Commerce’s total GDP, the figure presented maintained an annual increase of 5.5%.

As for total compensation, in December 2023, an index of 148.8 was reported, a value that maintains an annual variation of -7.7%.

Total compensations of retail trade in Querétaro (2018-2023)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Monthly Survey of Commercial Companies [2018 series]), 2024.  
Note: Base index 2018 = 100.



## Foreign commerce promotion programs

Their purpose is to boost the productivity and quality of company processes in order to increase their competitiveness and enable their incorporation into the world market.

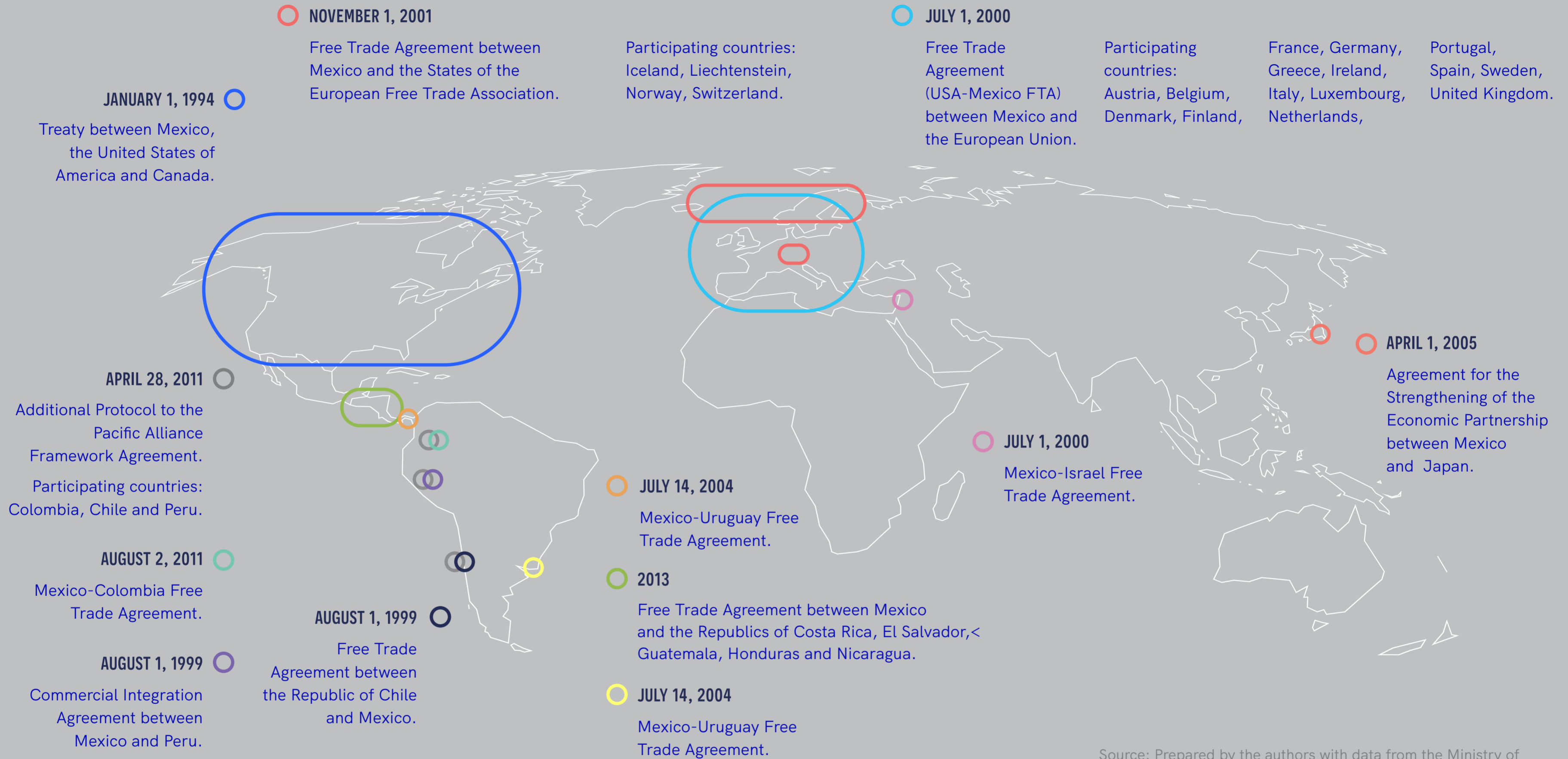
- ▶ **Maquiladora Manufacturing Industry and Export Services Program (IMMEX):** offers the possibility of importing goods under a temporary regime, deferring the payment of the general import tax, the value added tax and, if applicable, the countervailing duties, as long as they carry out an industrial or service process intended for manufacturing, transformation or repair and/or the rendering of export services.
- ▶ **Tax Refund Program for exporters (DRAW-BACK):** is an import tax refund scheme for exporters, which allows beneficiaries to claim the General Import Tax (tariff) paid on the import of inputs, raw materials, parts and components, packaging and containers, fuels, lubricants and other materials incorporated into the exported product or that are returned in the same state.

### 6.2.2

## Foreign commerce

It refers to the exchange of goods or services between at least two countries, these can be imports or exports; its purpose is to provide a nation with commodities it lacks, in exchange for those it produces in abundance, in order to improve the standard of living of its citizens.

At the national level, the promotion of foreign trade is of great importance, the objective is to consolidate Mexico as an exporting power, facilitating trade, reducing costs and increasing competitiveness.



Source: Prepared by the authors with data from the Ministry of Economy (International Trade Treaties Information System), 2024.

### Trade agreements signed by Mexico

The Ministry of Economy reports that Mexico currently has 13 Free Trade Agreements signed with 50 countries; 30 Agreements for the Pro-

motion and Reciprocal Protection of Investments with 31 countries or administrative regions; 9 agreements of limited scope within the frame-

work of the Latin American Integration Association; among them we can appreciate those highlighted in the figure above.



### World Trade Organization (WTO)

Established on January 1, 1995 and headquartered in Geneva, Switzerland, the WTO deals with global rules governing trade among its members. Its main function is to ensure that trade between countries is as fluid and free as possible.

Today, it has 164 members representing 98% of world trade. Mexico has been a member of the WTO since January 1, 1995. In 2023, the country contributed CHF (Swiss Franc) 3,935,415, or 2% of members' contributions.

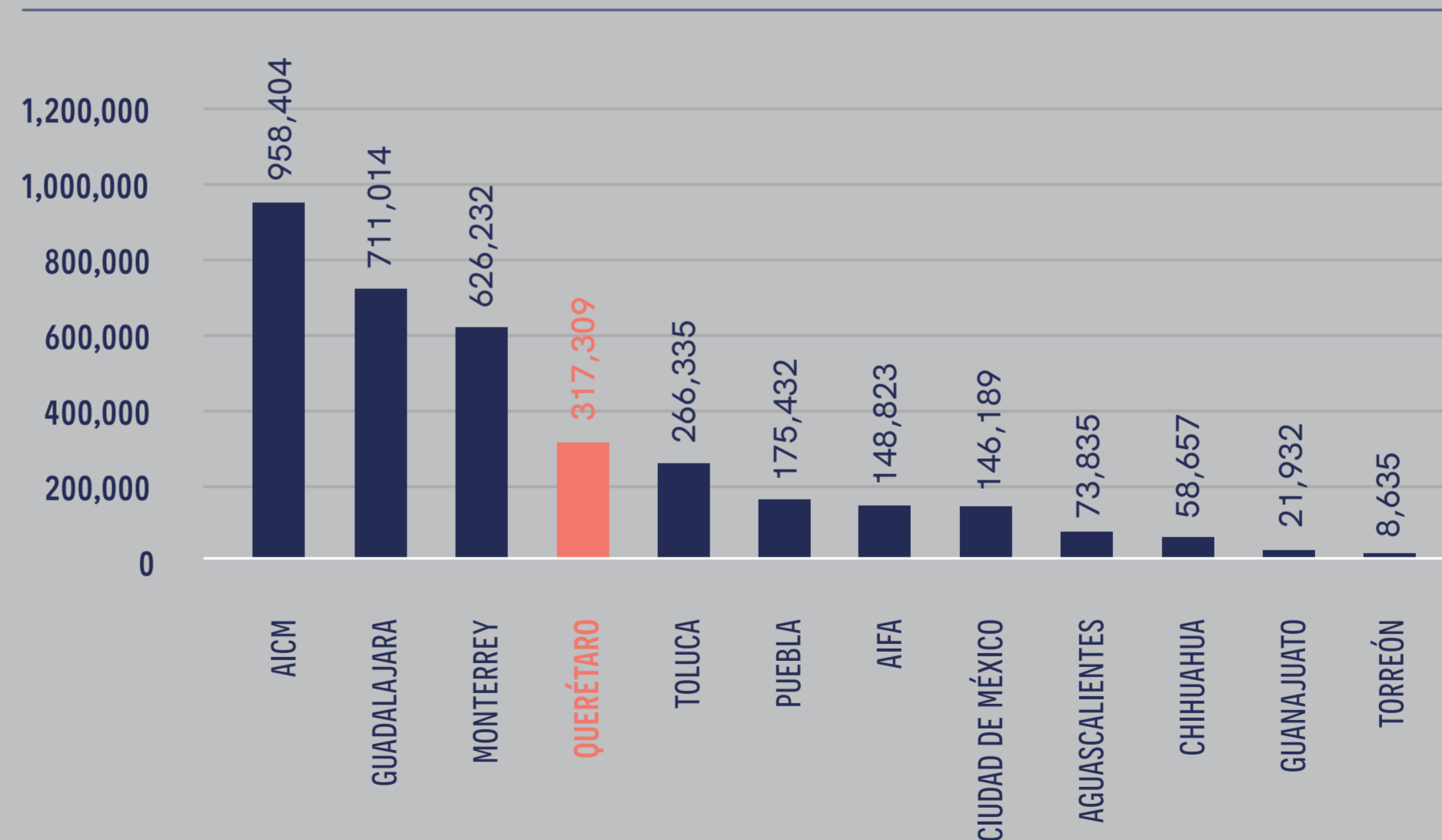
According to the WTO, by 2022 the value of world merchandise exports increased by 11% to \$24,905 trillion current dollars, while commercial services exports increased by 16% to \$7,076 trillion current dollars.

### Customs in Querétaro

Founded on July 22, 1983, it is currently located on State Highway 200, Querétaro-Tequisquiapan km 22.5, in the municipality of Colón, Qro. The body belongs to the territorial jurisdiction of the states of Querétaro, Hidalgo and 88 municipalities of Michoacán.



### Inland Customs Operations (2023)



Source: Prepared by the authors with data from the National Customs Agency of Mexico (Foreign trade figures), 2024. Note: At the date the information was consulted, data were reported through October.



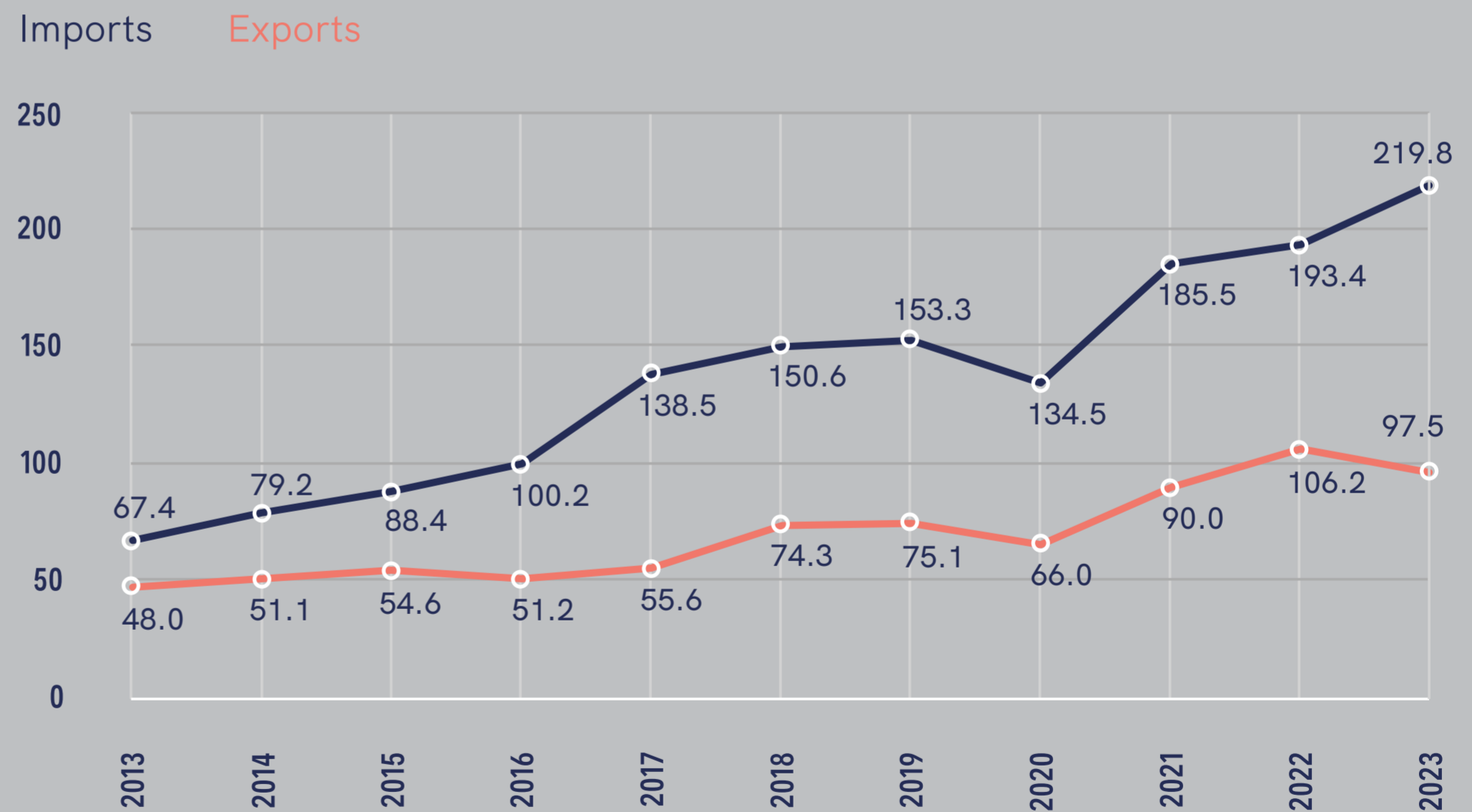
Mexico has a total of 50 customs offices, of which 12 are inland customs offices. Of the latter, from January to October 2023, Querétaro ranked 4th with the highest number of operations, accumulating a total of 317,309.

Of the total operations registered at Querétaro Customs from January to October, 69.3% (219,809) were imports and 30.7% (97,500) exports, which maintained an annual variation of 13.6% and -8.2%, respectively.

June was the month with the highest number of import operations with 23,991, while March was the month with the highest number of export operations with 11,491.

The value of operations amounted to MXN \$153,015 MM for imports and 97,814 million pesos for exports.

### Operations recorded at Querétaro Customs (2013-2023)



Source: Prepared by the authors with data from the National Customs Agency of Mexico (Foreign trade figures), 2024.

Note: Figures are expressed in thousands.

At the time the information was consulted, data was reported through October, so the reports for each year consider the sum of operations from January through October.



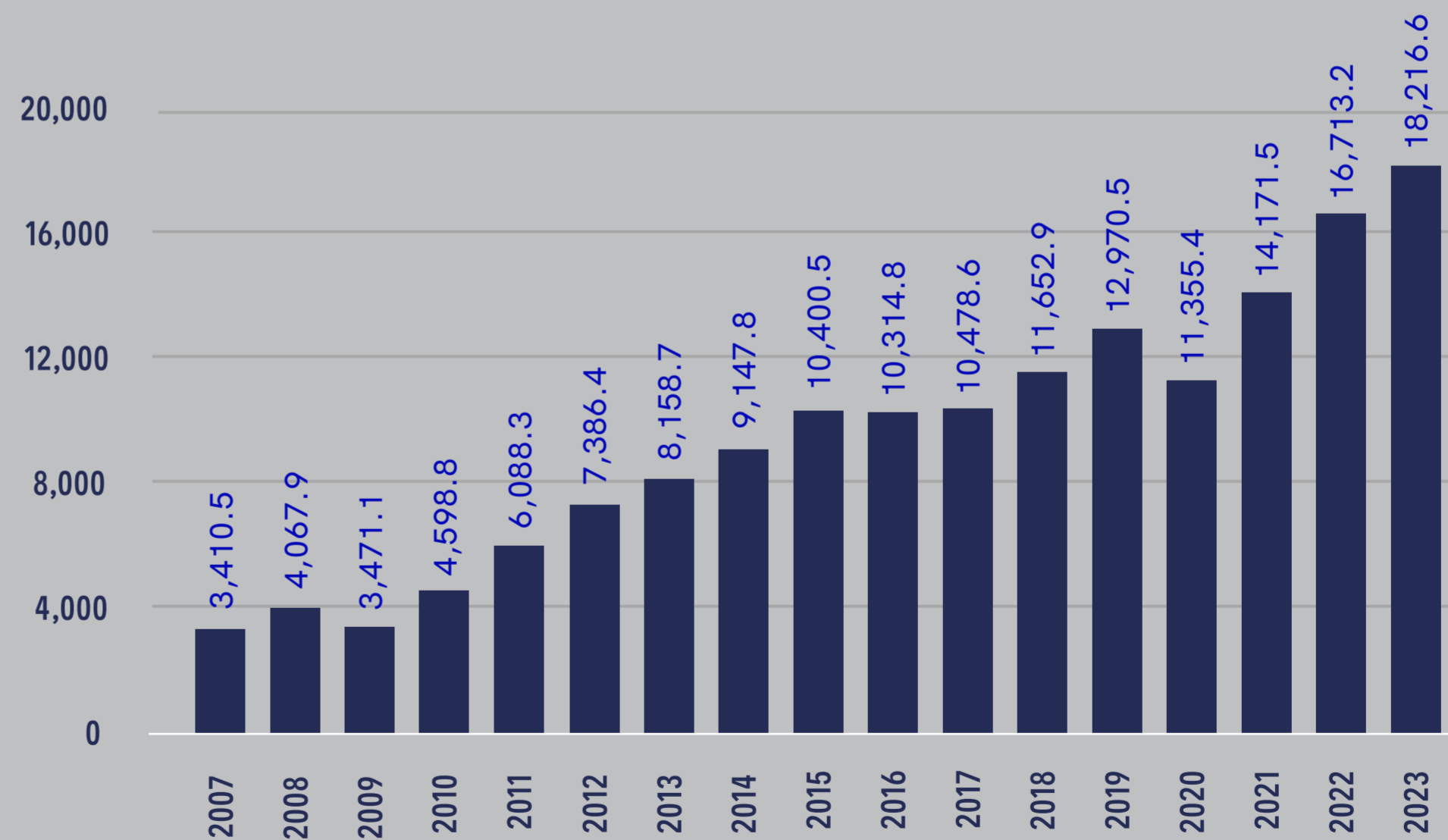


### Exports in Querétaro

During 2023, the value of exports nationwide amounted to 533,029.3 million dollars (MUSD), a figure that maintains an annual variation of 2.4%. States like Chihuahua, Coahuila, Nuevo León and Baja California accounted for 46.1% of the value of exports. Querétaro accounted for 3.4% of the national total and moved up one position in terms of the highest value of exports at the national level, from 13th to 12th place.

The levels of exports in the state continue with a growth trend. Over the course of 2023, it reached 18,216.6 MDD, representing an annual growth of 9%.

Exports registered in Querétaro (2007-2023)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Quarterly Exports by Mexican State), 2024.  
Note: Figures are expressed in millions of dollars.

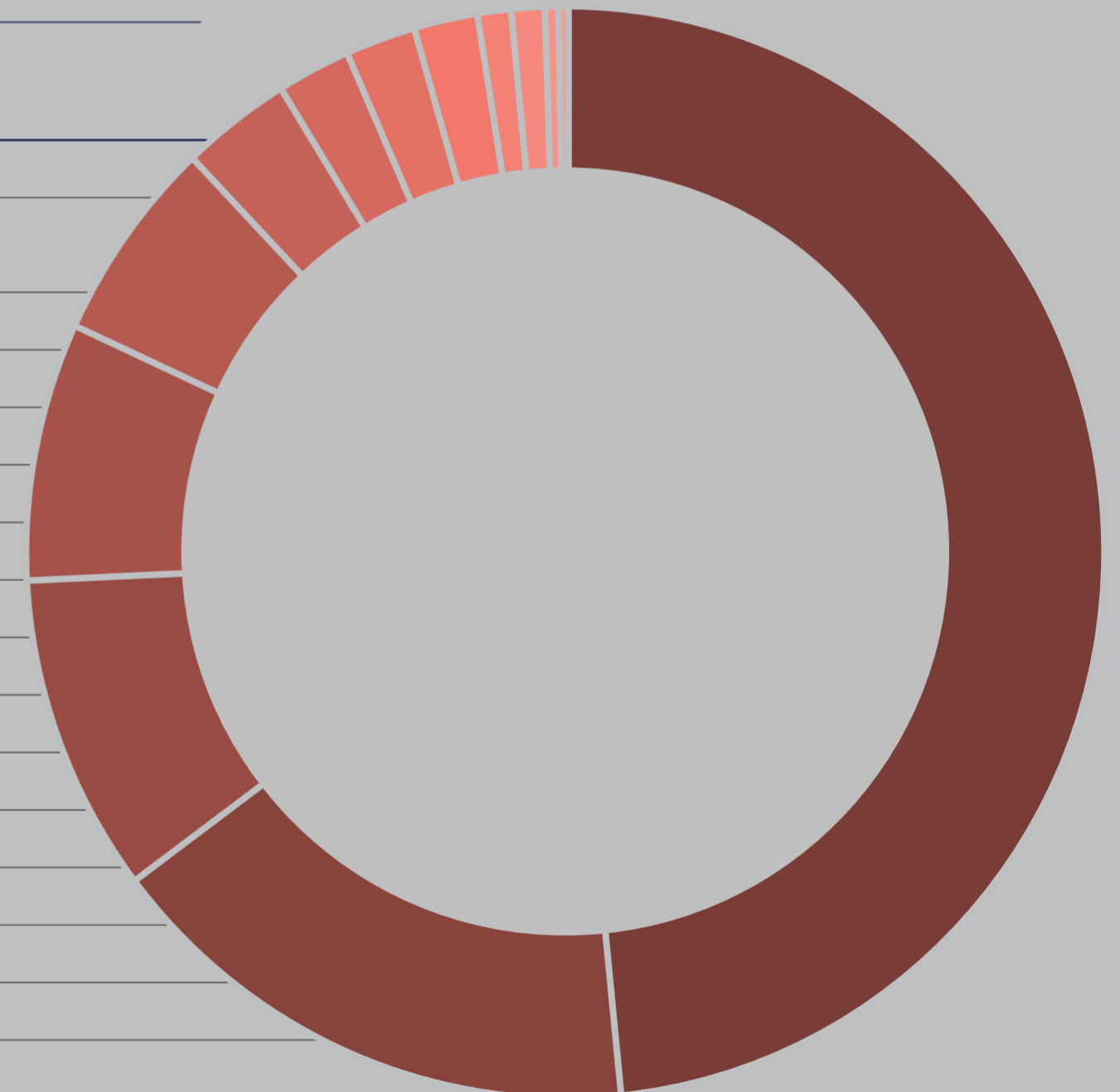


## Exports from Querétaro by SCIAN subsector of activity

Nearly 50% of exports were recorded in the transportation equipment manufacturing subsector, which showed a growth of 18.3%, placing it as the 4th with the highest growth in the 2023 framework.

### Querétaro exports by activity subsector (2023)

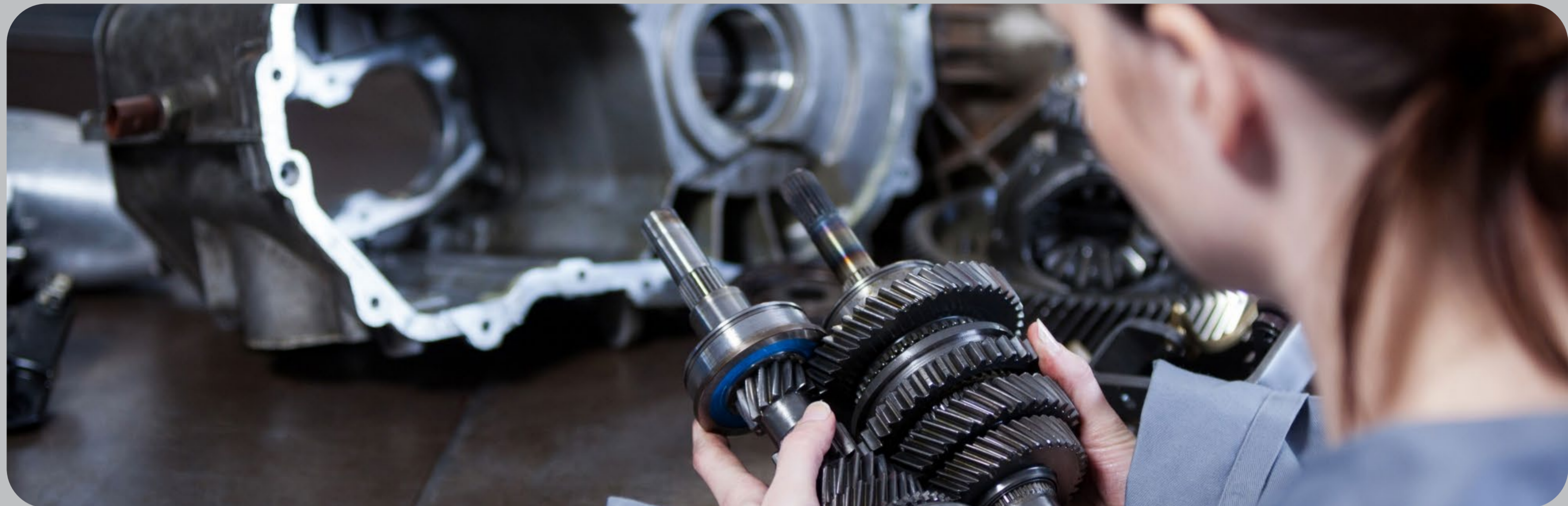
	EXPORTS	VAR. % (2023-2022)	DISTRIBUTION
Manufacture of transport equipment	8,788.3	18.3%	48.2%
Manufacture of electrical accessories, apparatus and equipment for the generation of electrical energy	2,974.7	-2.7%	16.3%
Machinery and equipment manufacturing	1,708.1	-0.3%	9.4%
Manufacturing of computer, communication and measuring equipment	1,388.5	3.1%	7.6%
Plastics and rubber industry	1,084.2	21.8%	6%
Manufacture of metal products	601.1	22%	3.3%
Chemical industry	394.4	-10.4%	2.2%
Food industry	376.8	-3.5%	2.1%
Paper industry	355.1	-6.5%	1.9%
Agriculture	182.5	10.6%	1%
Manufacture of products based on non-metallic minerals	154	-9.0%	0.8%
Printing and related industries	40.9	-12.3%	0.2%
Beverage and tobacco industry	30	-21.4%	0.2%
Garment manufacturing	29.2	-6.5%	0.2%
Basic metal industries	18.1	28.4%	0.1%



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Quarterly Exports by Mexican State), 2024.

Note: The rest of the subsectors that do not appear in the list is because the export figures appear as "C", which refers to "confidential".

Export figures are expressed in millions of dollars.



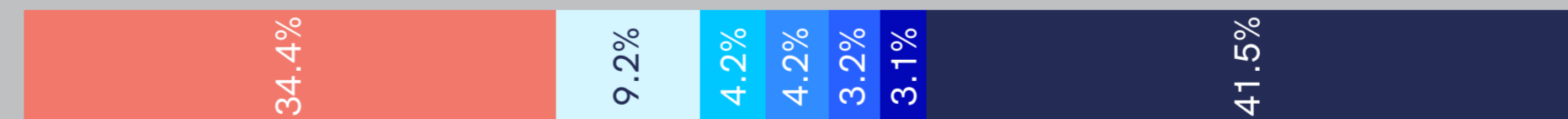
### Querétaro international sales

Likewise, according to DataMéxico, 435 products were marketed in Querétaro through international sales in 2023, reaching a total amount of 13,963.1 million dollars (MUSD). Six products accounted for 58.5% of sales, with an amount of \$8,161.5 MUSD.

The main destinations of the products were: United States (82.4%), Canada (5.1%), United Kingdom (1.4%), Brazil (1%), Germany (0.9%) and France (0.9%), together, the value of sales from these countries amounted to 14,755.2 MUSD.

### Main products in international sales\* in Querétaro (2023)

Motor vehicle parts and accessories	Refrigeration or freezing equipment	Turbojets and turboprops	Machines and equipment
Electricity distribution boards	Rubber tires	Other products	



Source: Prepared by the authors with data from the Ministry of Economy (DataMexico), 2024.  
Note: \*International sales in DataMexico refer to the total sales made abroad by companies whose tax domicile is registered in a particular state. Thus, International Sales by State represent a different concept from Exports by State.



### Querétaro international purchases

With respect to international purchases, according to DataMéxico, during 2023, 715 products entered Querétaro through international purchases, with a total amount of 17,999.4 million dollars (MUSD).

The main importing countries were: United States (38.9%), China (12.7%), Germany (6.3%), Japan (5.1%), South Korea (4.5%), together, the value of imports from these countries totaled 13,845.8 MUSD.

### Main products in international purchases in Querétaro (2023)

Motor vehicle parts and accessories

Turbojets and turboprops

Tractors

Precious metal in colloidal state

Rubber tires

Laminated products

Other products

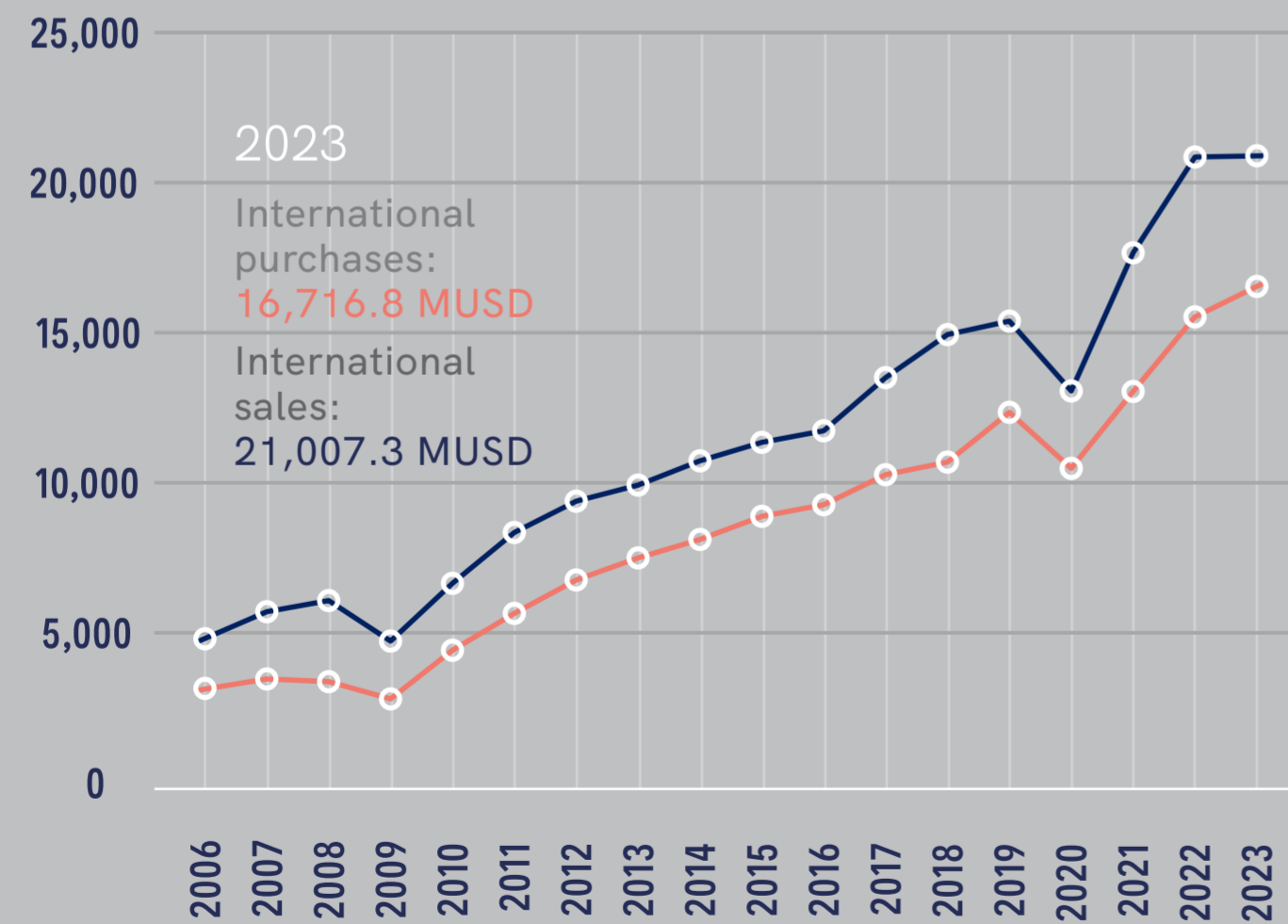


Source: Prepared by the authors with data from the Ministry of Economy (DataMexico), 2024.

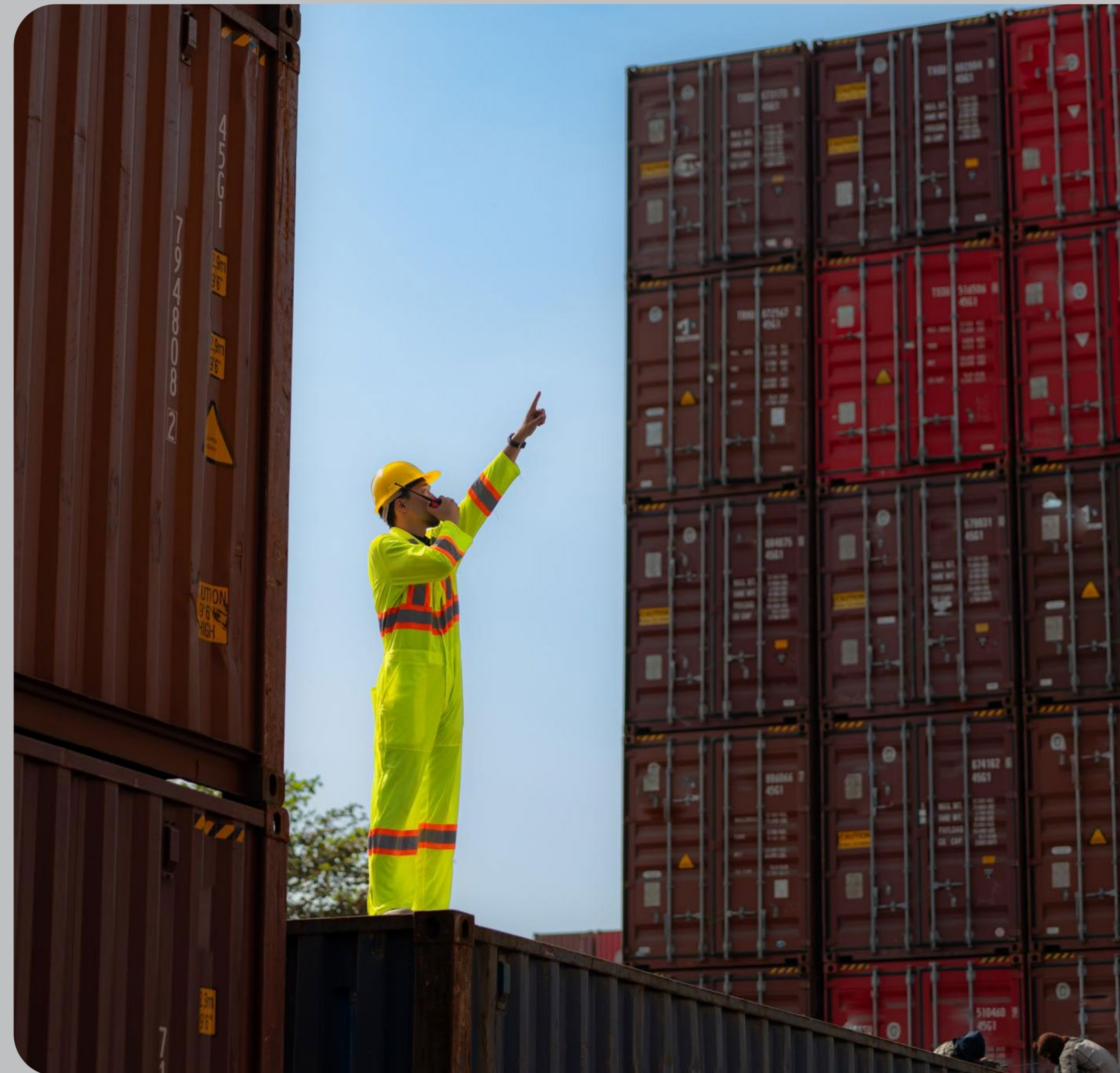


### International trade

Net international trade in Querétaro (2006-2023)



Source: Prepared by the authors with data from DataMexico (net international trade), 2024.





## 6.3

# Foreign Direct Investment (FDI)

Today, FDI is considered the engine of economic growth in host countries, as it facilitates job creation, increases productivity, enhances competitiveness and boosts international trade.

Different governments have implemented policies to encourage more companies to set up in their country, facilitating access processes and offering incentives.

Over the years, Querétaro has stood out as a state that attracts a significant number of companies from abroad.





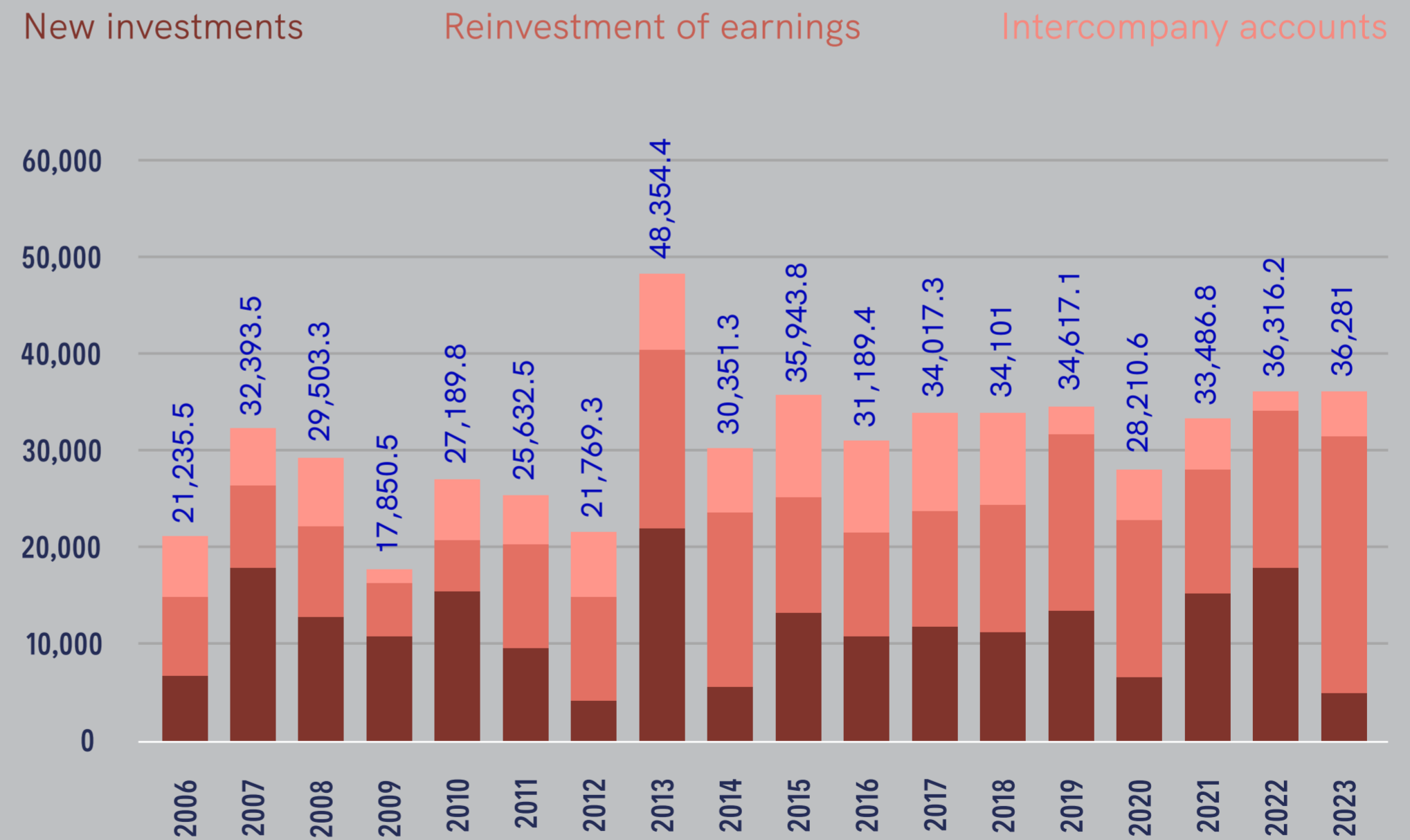
### 6.3.1

## Foreign Investment in Mexico

In 2023, \$36,281 MUSD in investment flows were recorded at the national level, an amount that maintains an annual variation of -0.1%. The 2023 value is the third highest in the Foreign Direct Investment (FDI) record from 2006 to date.

Of the total FDI, 73.4% was profit reinvestment, 13.9% new investments and 12.7% intercompany accounts.

### FDI flows by type of investment in Mexico (2023)

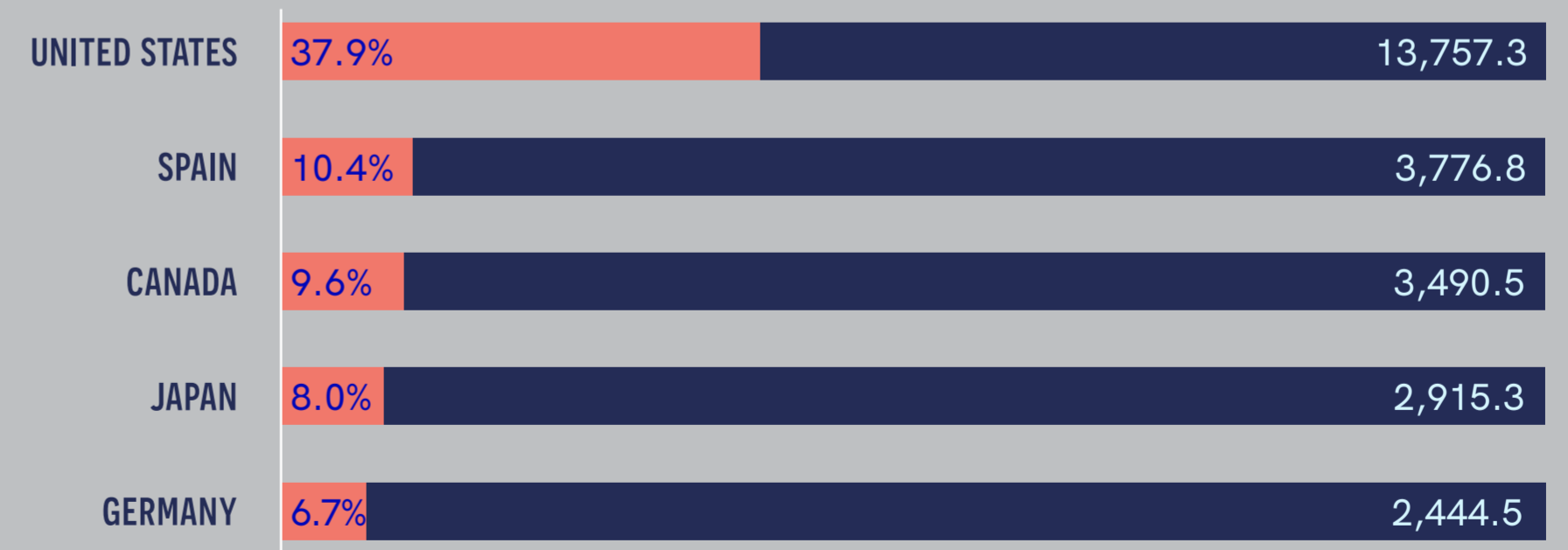


Source: Prepared by the authors with data from the Ministry of Economy (Foreign Direct Investment), 2024.  
Note: Figures are expressed in millions of dollars.  
From 2023, the Ministry of Economy only publishes data from 2006 to date.



The United States continues to have an important leadership within the FDI received by the country; in 2023, it contributed 37.9% of the total FDI at the national level. Despite this, the amount reported a 32% decrease with respect to the previous year, which period stood at \$20,222 MUSD.

### FDI flows from Mexico's main trading partners (2023)



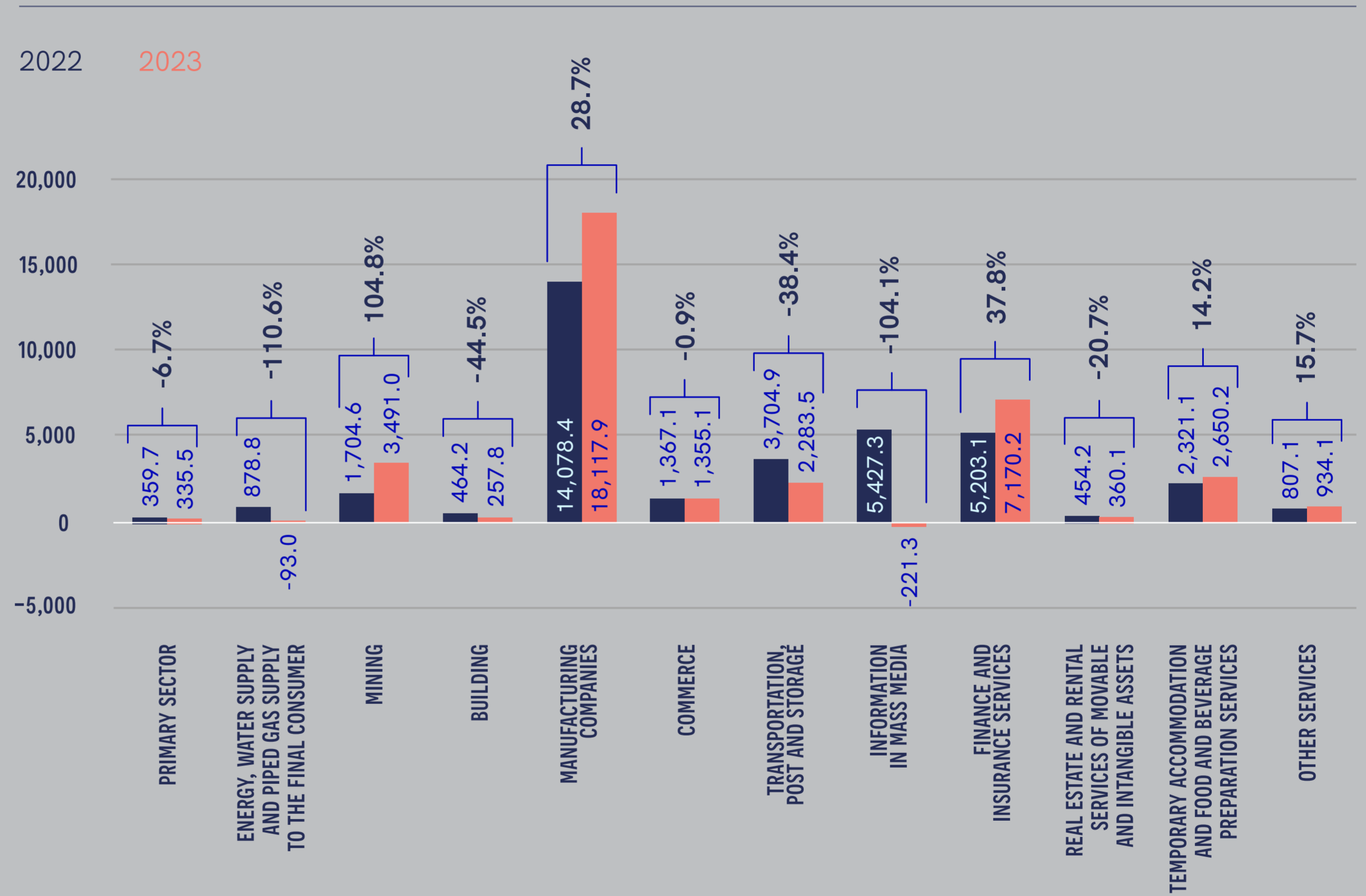
Source: Prepared by the authors with data from the Ministry of Economy (Foreign Direct Investment), 2024.  
Note: Figures are expressed in millions of dollars.





During 2023, 0.9% of FDI was located in the primary sector, 60% in the secondary sector and 40.1% in the tertiary sector.

FDI flows in Mexico by sector (2022-2023)



Source: Prepared by the authors with data from the Ministry of Economy (Foreign Direct Investment), 2024.

Note: Figures are expressed in millions of dollars.

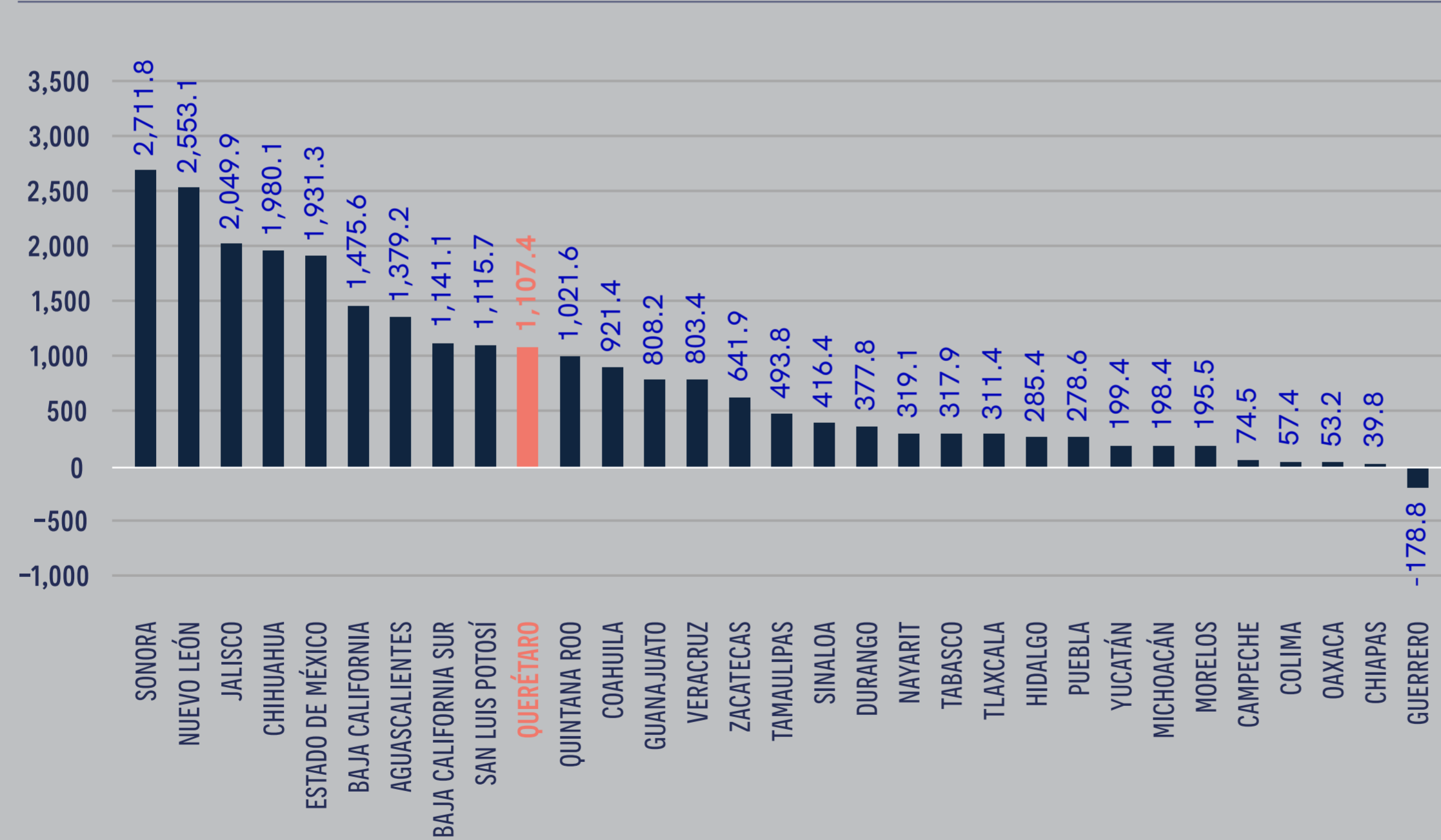
The primary sector covers: agriculture, animal breeding and exploitation, forest harvesting, fishing and hunting.

Other services include: professional, scientific and technical services; business support services and waste management and remediation services; educational services; health and social work services; cultural and sporting entertainment and other recreational services; other services except governmental activities.



Querétaro contributed 3.1% of the total investment flows registered at the national level during 2023, that is, \$1,107.4 MUSD, ranking 11th among the states that contributed the most investment.

FDI inflows by state (2023)



Source: Prepared by the authors with data from the Ministry of Economy (Foreign Direct Investment), 2024. Note: Figures are expressed in millions of dollars.





### 6.3.2

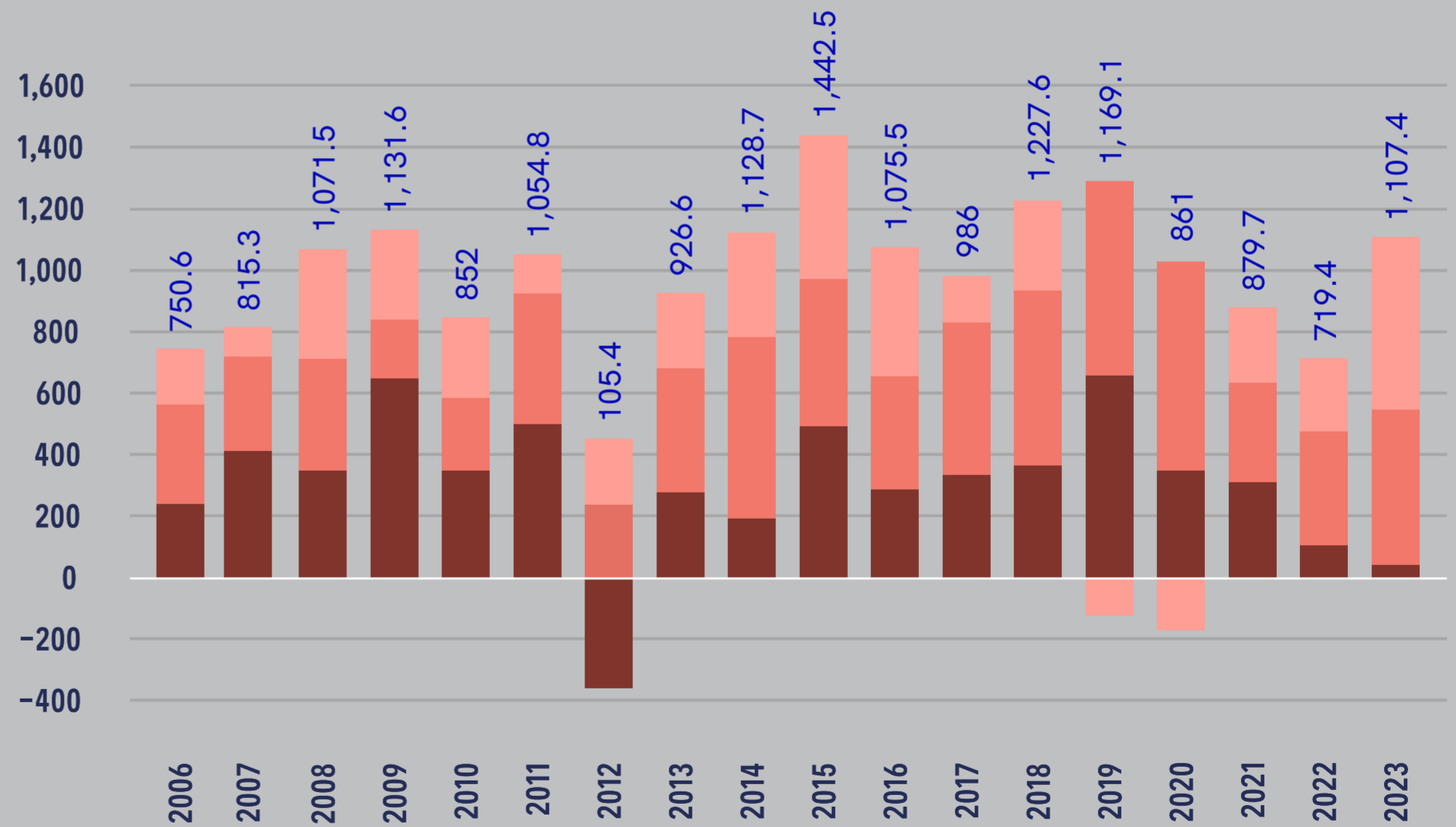
## Foreign Investment in the state

In 2023, investment flows in Querétaro amounted to \$1,107.4 MUSD, an annual variation of 53.9%. The amount is the 6th highest recorded in the state, from 2006 to date.

Regarding the value reported for 2023, 4% were new investments, 45.7% reinvested earnings and 50.4% inter-company accounts.

## FDI flows by type of investment in Querétaro (2023)

New investments    Reinvestment of earnings    Intercompany accounts



Source: Prepared by the authors with data from the Ministry of Economy (Foreign Direct Investment), 2024.

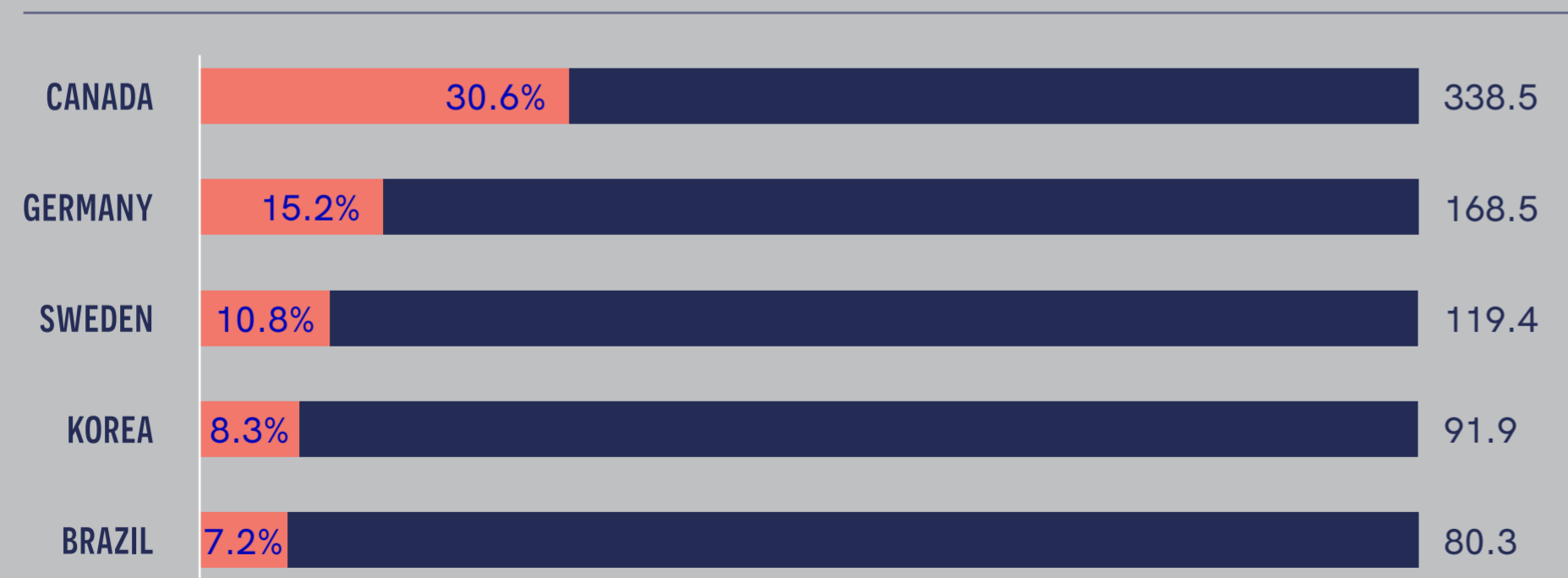
Note: Figures are expressed in millions of dollars.

From 2023, the Ministry of Economy only publishes data from 2006 to date.



During 2023, 72.1% of the investment flows that entered the state were from Canada —being the main trading partner for that year—, Germany, Sweden, Korea and Brazil.

### FDI flows of the main trading partners in Querétaro (2023)



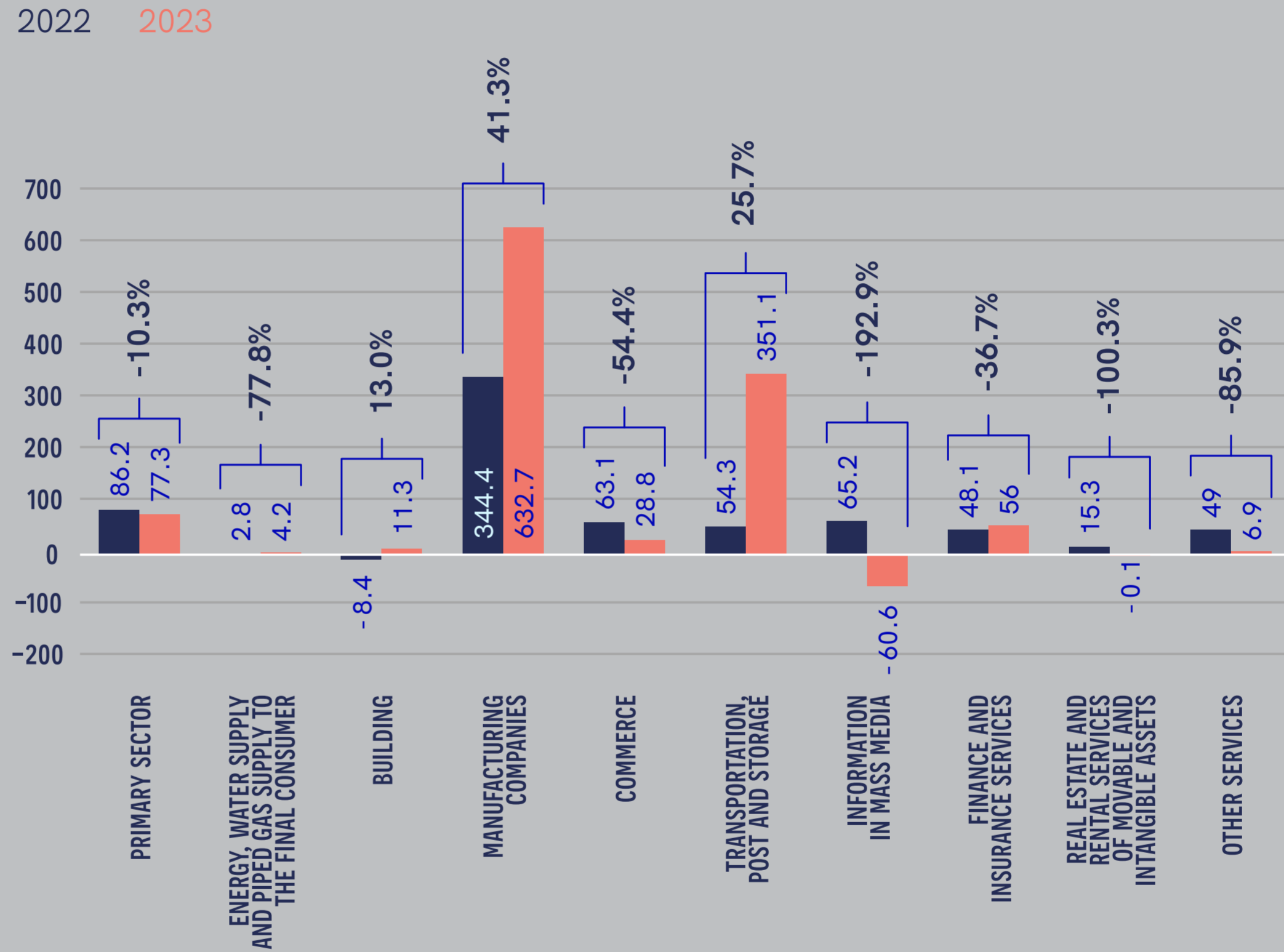
Source: Prepared by the authors with data from the Ministry of Economy (Foreign Direct Investment), 2024.  
Note: Figures are expressed in millions of dollars.





The primary sector accounted for 7% of FDI, the secondary sector for 58.5% and the tertiary sector for 34.5%.

### FDI flows in Querétaro by sector (2022-2023)



Source: Prepared by the authors with data from the Ministry of Economy (Foreign Direct Investment), 2024.  
 Note: Figures are expressed in millions of dollars. The primary sector covers: agriculture, animal breeding and exploitation, forest harvesting, fishing and hunting.  
 Other services included: professional, scientific and technical services; business support services and waste management and remediation services; educational services; health and social work services; cultural and sporting entertainment and other recreational services; other services except governmental activities.  
 The mining sector was not considered because its value is confidential.



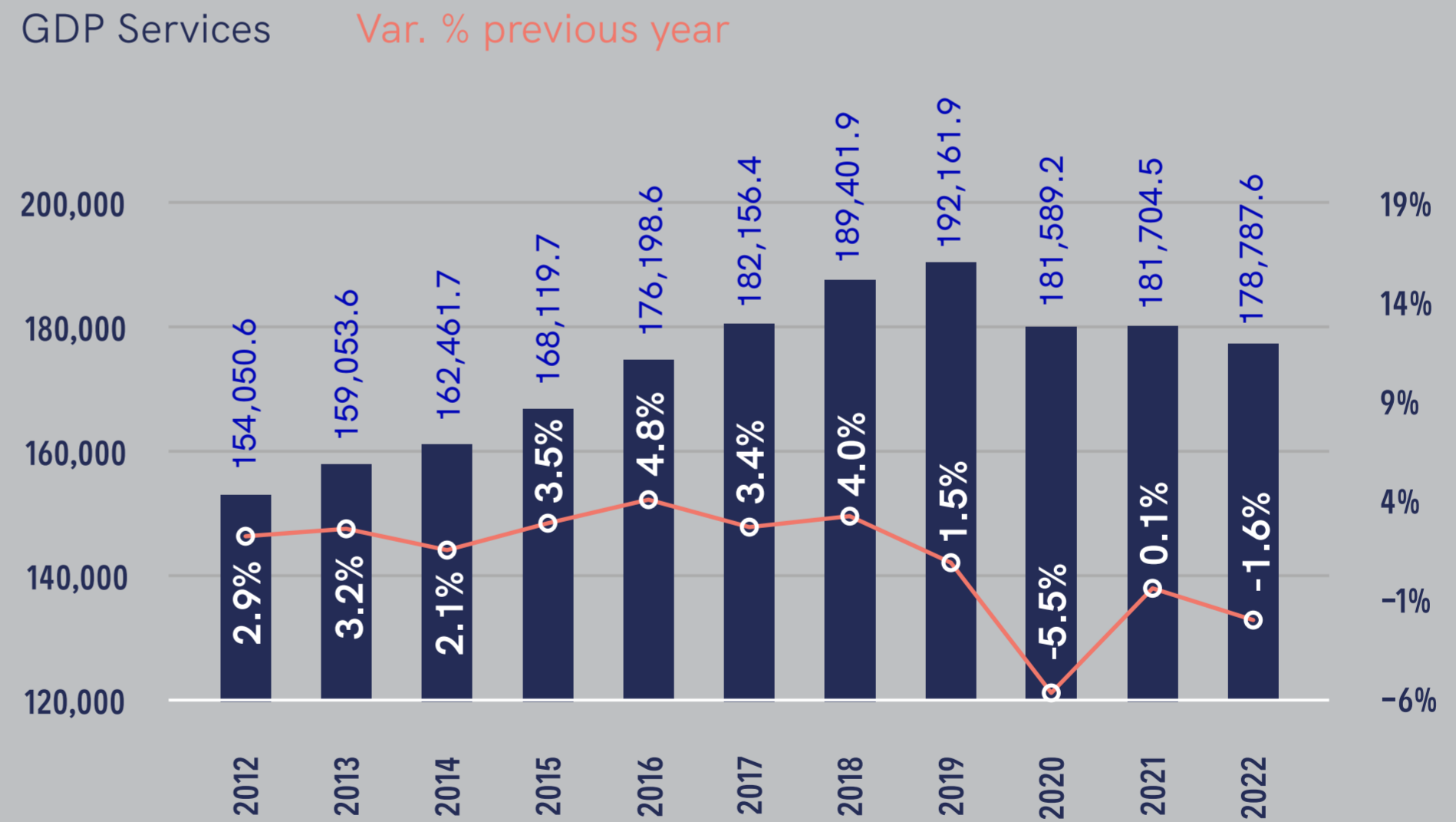
6.4

# Services

## Gross Domestic Product (GDP) of services

In the 2022 framework, Services reported 178,787.6 million pesos at 2018 prices within the state's GDP, a figure that represents 30.2% of the total and 60.8% of what was reported by the tertiary sector. This amount presented an annual variation of -1.6%. The state is equivalent to 2% of the sector's GDP at the national level.

### Gross Domestic Product (GDP) of services in Querétaro (2012-2022)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (GDP by state [PIBE]; 2018 base), 2024.  
Note: Figures are expressed in millions of pesos in constant values.



### Services Employment

In December 2023, the IMSS reported 242,208 people formally working in Service activities, 5.8% more than in 2022, 45.2% of whom were women

and 54.8% men. The average salary remained at \$579.56 for women and \$674.33 for men.

Of the total number of service jobs nationwide (8,591,234), Querétaro accounted for 2.8%.

### Economic units in the Services

According to the National Statistical Directory of Economic Units (DENUE, by its acronym in Spanish), there are 43,710 units dedicated to Services in the state, 90.3% of which are micro-enterprises, which represents 45.6% of the total number of establishments in the state and 1.8% of the total number of services at the national level.

#### Distribution of economic units in Services in Querétaro (2023)

SIZE	ESTABLISHMENTS	DISTRIBUTION
Micro	39,483	90.3%
Small	3,515	8%
Medium	376	0.9%
Big	336	0.8%
<b>Total</b>	<b>43,710</b>	<b>100%</b>

Source: Prepared by the authors with data from the National Institute of Statistics and Geography (National Statistical Directory of Economic Units), 2024.

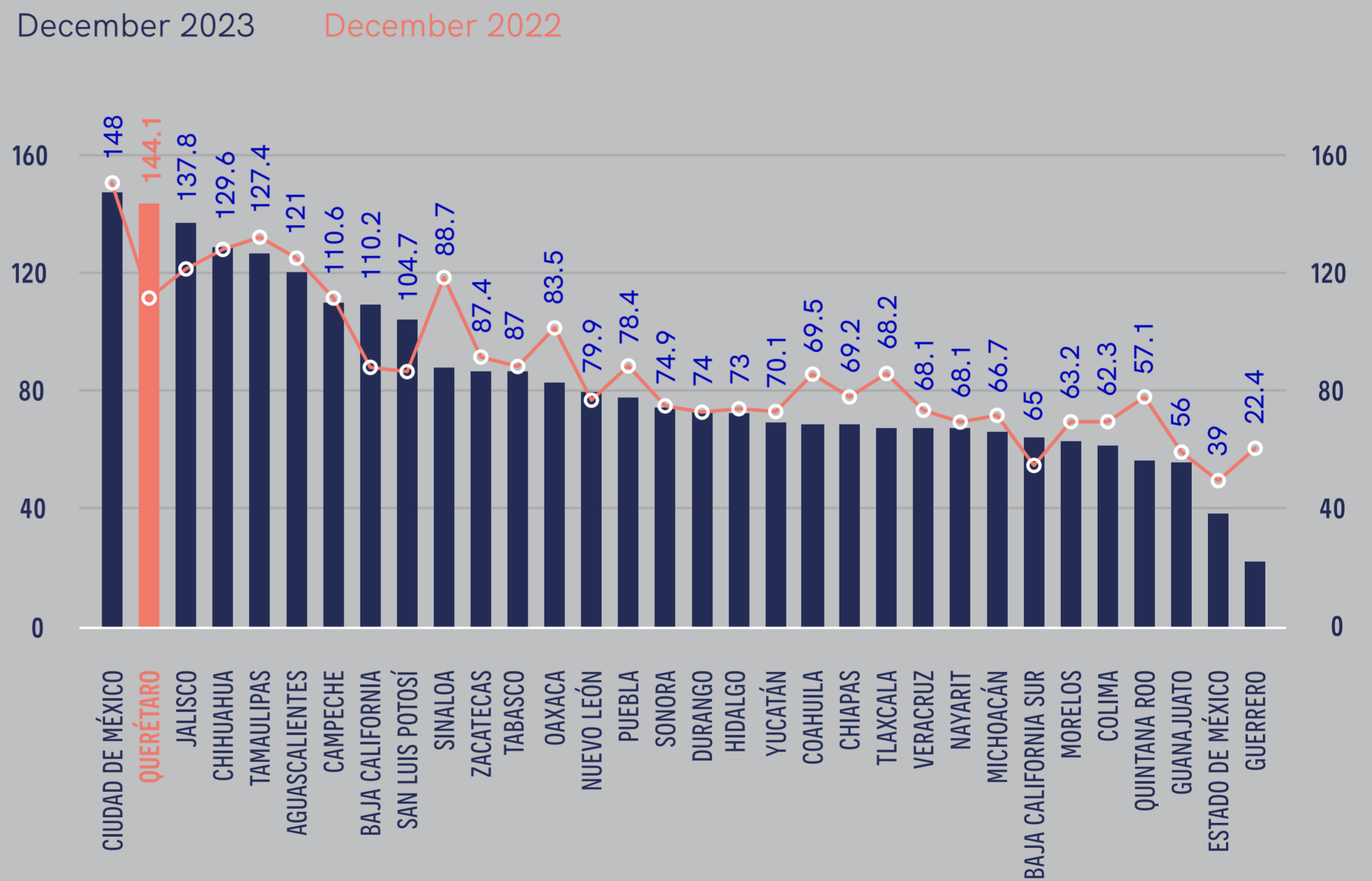


6.4.1

### Monthly Survey of Services (EMS, by its acronym in Spanish)

The EMS shows the performance of the main activities of the Private Non-Financial Services sector. In December 2023, Querétaro was ranked as the 2nd state with the highest total income index for the supply of goods in the mass media information sector, with an annual variation of 28.4%, making it the 1st state with the highest growth.

Index of total revenues from the supply of goods and services in the mass media information sector by state (December 2022-2023)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Monthly Survey of Services; 2018 base), 2024.

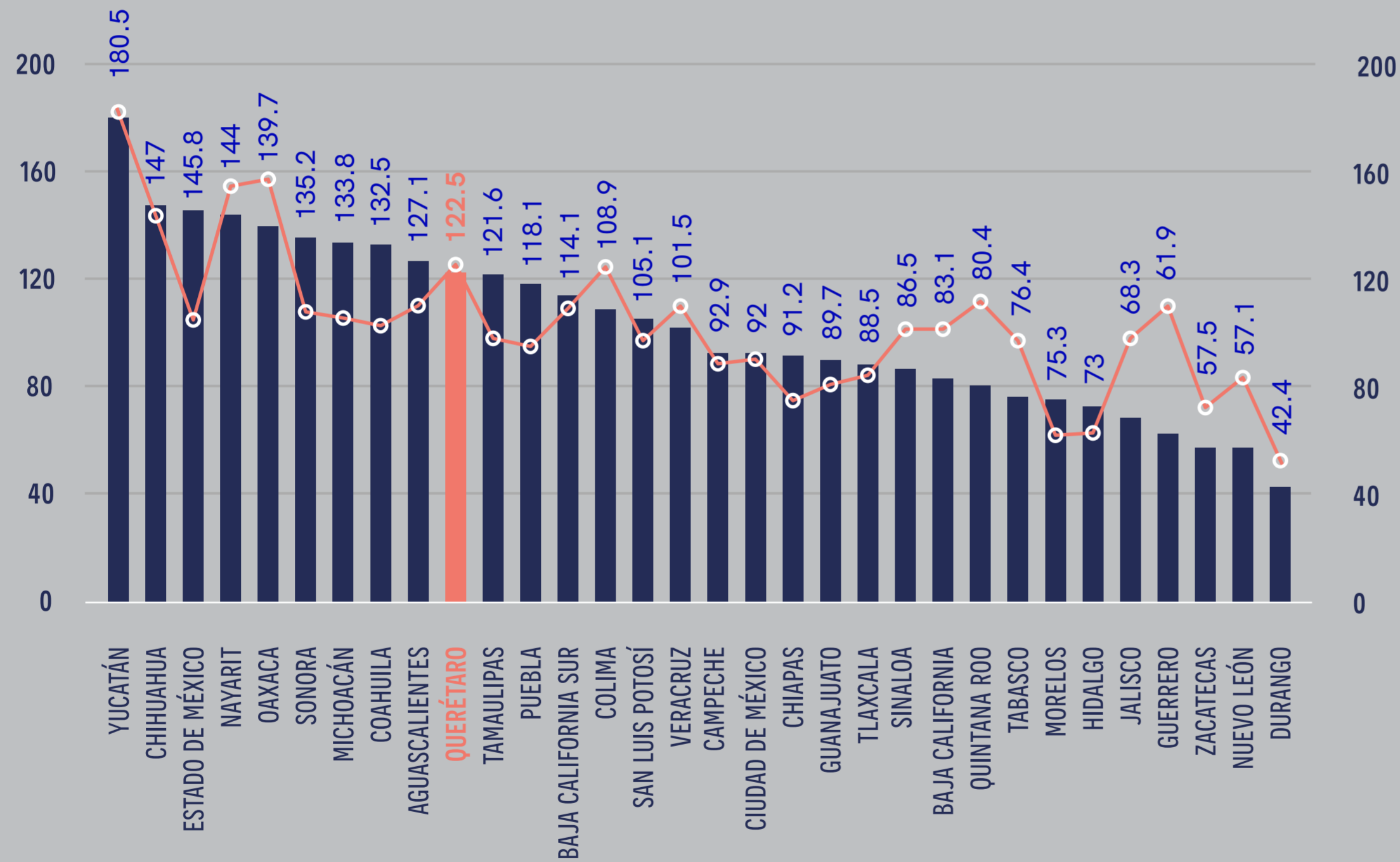




### Index of total income from the supply of goods and services in the temporary accommodation and food and beverage services sector, by federal state (December 2022-2023)

December 2023

December 2022



With respect to the index of total income from the supply of goods in the temporary lodging and food and beverage preparation sector, the state ranked 10th, reporting an annual variation of 2%.

Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Monthly Survey of Services; 2018 base), 2024.



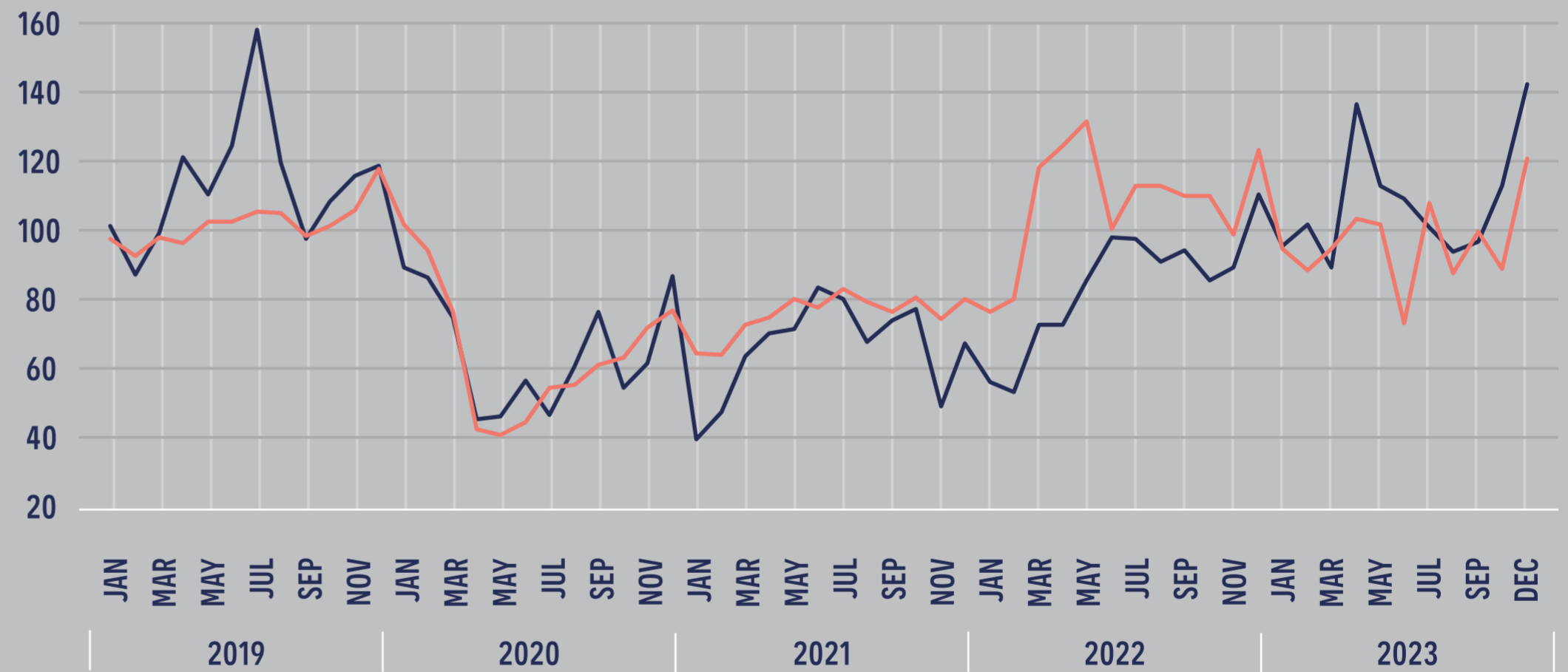
During 2023, the index for the mass media information sector ranged between 90.8 and 144.1, while that for the temporary accommodation and food and beverage preparation services sector ranged between 75 and 122.5.



### Index of total income from the supply of goods and services in Querétaro (2019-2023)

Information in mass media

Temporary accommodation services and food and beverage preparation services



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (Monthly Survey of Services; 2018 base), 2024.  
Note: The index considers the Private Non-Financial Services: 1) Mass media information; 2) Real estate services and rental of movable and intangible property; 3) Professional, scientific and technical services; 4) Business support services and waste and residue management and remediation services; 5) Educational services; 6) Cultural and sports entertainment services and other recreational services; 7) Temporary accommodation services and food and beverage preparation services, however, only two of them are considered because the information for the rest appears as "N/A - not available".



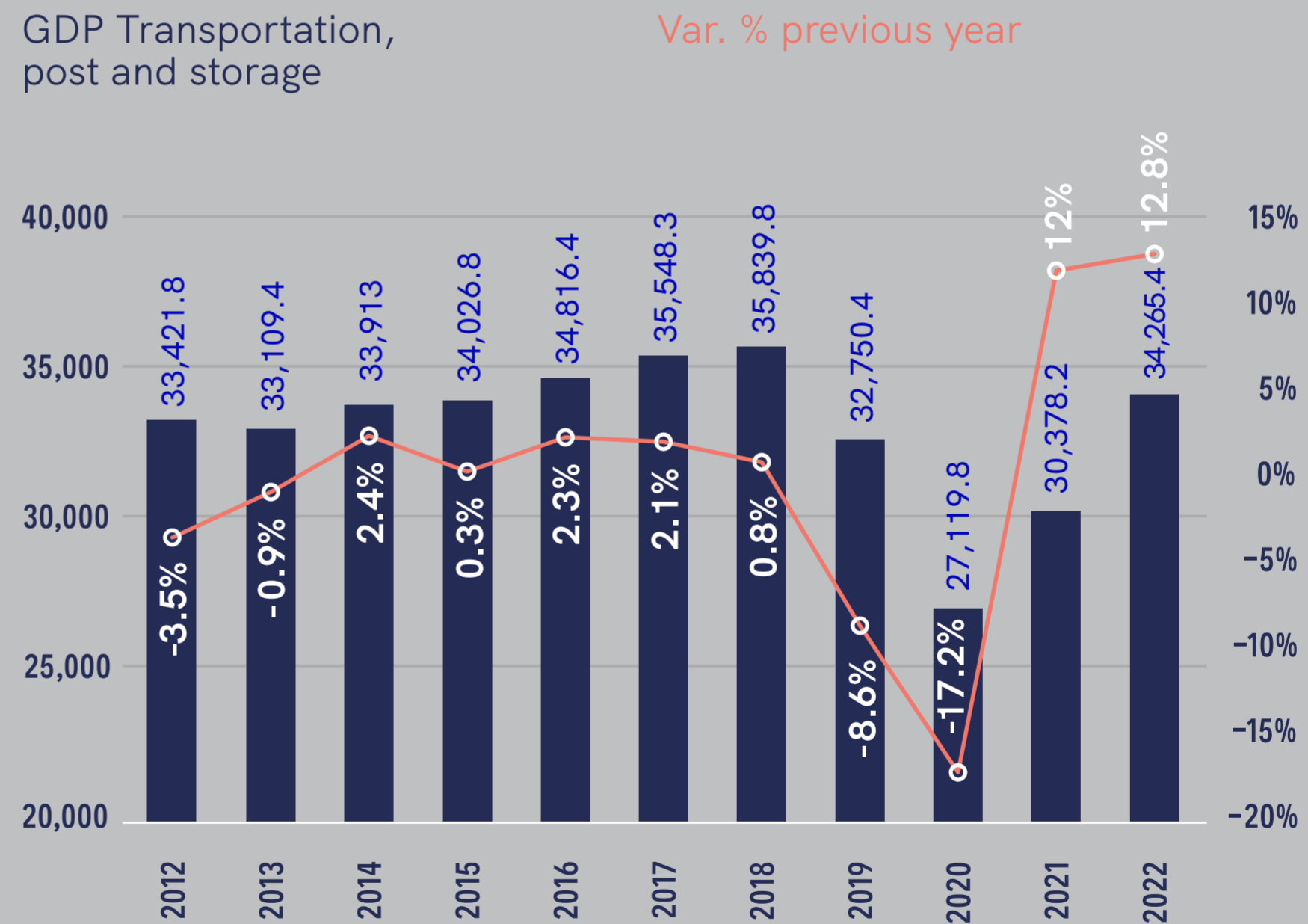
### 6.4.2

## Transportation, post and storage

Includes economic units dedicated mainly to the transportation of people and cargo. It also provides specialized services, including those related to the transportation and storage of goods.

In the course of 2022, transportation, post and storage services obtained MXN \$34,265.4 MM at 2018 prices within the GDP in the state, which represents 5.8% of the total and of 11.7% of that reported by the tertiary sector. This figure represents an annual variation of 12.8%. The state's share of the sector's GDP at the national level is equivalent to 2%.

### Gross Domestic Product of the sector\* in Querétaro (2012-2022)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (GDP by state [PIBE]; 2018 base), 2024.

Note: Figures are expressed in millions of pesos in constant values.

\* Refers to the transportation, postal and storage sector.



In December 2023, the IMSS counted 42,936 people formally working in the sector, 8.6% more than in 2022, with 23.5% being women and 76.5% men. The average salary remained at \$611.04 for women and \$559.09 for men.

According to the National Statistical Directory of Economic Units (DENUE, by its acronym in Spanish), there are 843 units in the sector in the state, —60.6% of which are micro-enterprises—, representing 0.9% of the total number of establishments in the state and 2.1% of establishments dedicated to the sector at the national level.

### Distribution of economic units in Services of transportation, post and storage in Querétaro (2023)

SIZE	ESTABLISHMENTS	DISTRIBUTION
Micro	511	60.6%
Small	235	27.9%
Medium	51	6%
Big	46	5.5%
<b>Total</b>	<b>843</b>	<b>100%</b>

Source: Prepared by the authors with data from the National Institute of Statistics and Geography (National Statistical Directory of Economic Units), 2024.





### 6.4.3

## Finance and insurance services

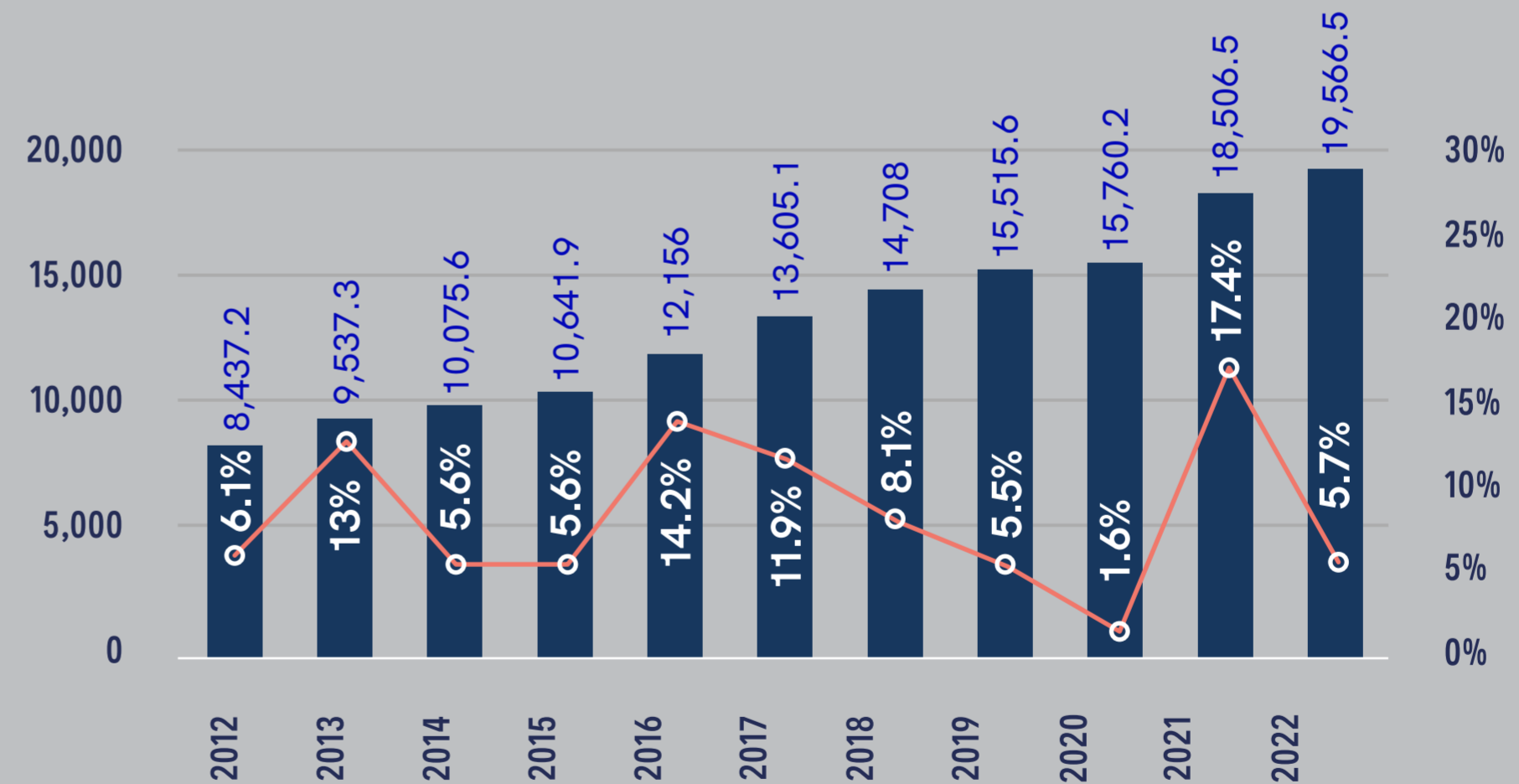
It comprises economic units engaged in the regulation of the issuance and circulation of currency; securities, exchange and financial investment activities; institutions that provide services related to insurance, bonds and retirement funds.

By 2022, financial and insurance services reported MXN \$19,566.5 MM within Querétaro's GDP, a figure that represents 3.3% of the total and 6.7% of that reported by the tertiary sector. The amount maintained an annual variation of 5.7%. The state is equivalent to 2.1% of the sector's GDP at the national level.

### Gross Domestic Product of the sector\* in Querétaro (2012-2022)

GDP Finance and insurance services

Var. % previous year



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (GDP by state [PIBE]; 2018 base), 2024.

Note: Figures are expressed in millions of pesos in constant values.

\* Refers to the Financial and Insurance Services sector.



By the end of 2023, IMSS (by its acronym in Spanish) had 14,108 people working formally in the sector, 8.4% higher than in 2022, being 57.1% women and 42.9% men. The average salary remained at \$725.05 pesos for women and \$908.12 for men.

According to the DENUE (by its acronym in Spanish), there are 2,290 economic units dedicated to this sector in the state, 90.7% of which are micro-enterprises, which represents 2.4% of the total number of establishments in the state and 2.3% of establishments dedicated to this sector at the national level.

### Distribution of economic units in financial and insurance services in Querétaro (2023)

SIZE	ESTABLISHMENTS	DISTRIBUTION
Micro	2,077	90.7%
Small	188	8.2%
Medium	17	0.7%
Big	8	0.3%
<b>Total</b>	<b>2,290</b>	<b>100%</b>

Source: Prepared by the authors with data from the National Institute of Statistics and Geography (National Statistical Directory of Economic Units), 2024.



## Financial Inclusion

Promotes access to and use of financial services in order to generate social and financial benefits for the population, among which the following

stand out: to face unforeseen events or economic shocks, take advantage of opportunities and invest in assets.



## Financial infrastructure in Querétaro

In the state, during the third quarter of 2023, a higher coverage of financial infrastructure per 10,000 adults was achieved, compared to the figures reported at the national level.

## Total access channels per 10,000 adults (3Q 2023)

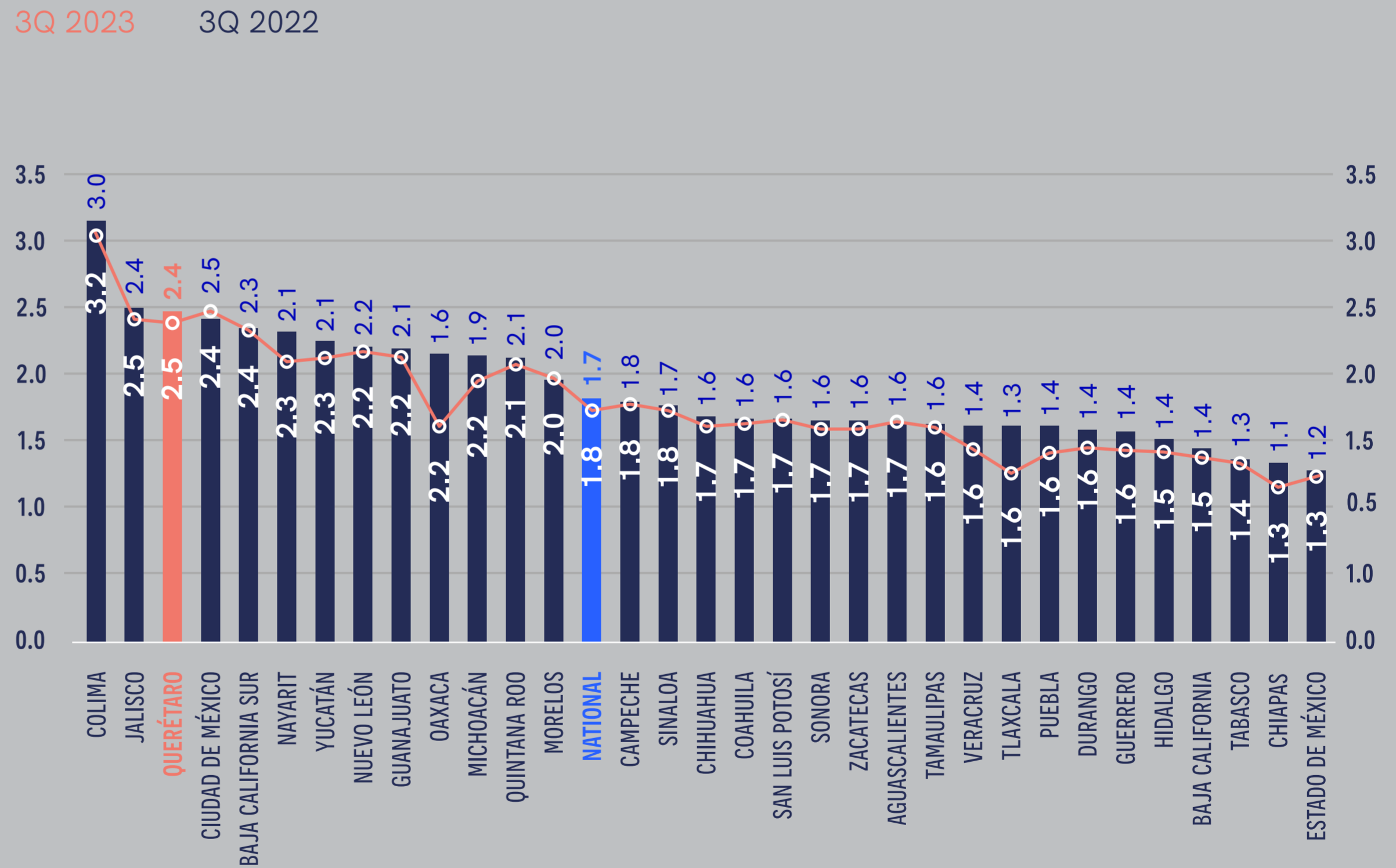
ACCESS CHANNELS	NATIONAL		QUERÉTARO	
	Absolut values	For every 10,000 adults	Absolut values	For every 10,000 adults
Branches	17,814	1.8	434	2.5
Correspondents	52,804	5.5	1,139	6.5
ATMs	66,168	6.8	1,543	8.9
Point-of-sale terminals	1,361,166	140.6	29,314	168.2
Establishments with POS <sup>1</sup>	781,909	80.8	21,492	123.3

Source: Prepared by the authors with data from the National Banking and Securities Commission (Data base of financial inclusion), 2024.  
 Note: <sup>1</sup>POS stands for "Point of Sale Terminal".



Nationwide, there were 17,814 financial branches, it means 1.8 per 10,000 adults. In the case of Querétaro, the number of branches amounted to 2.5, making it the 3rd state with the highest number of branches available, thus advancing one position with respect to the third quarter of 2022.

Branches per 10,000 adults per state (3Q 2022-2023)

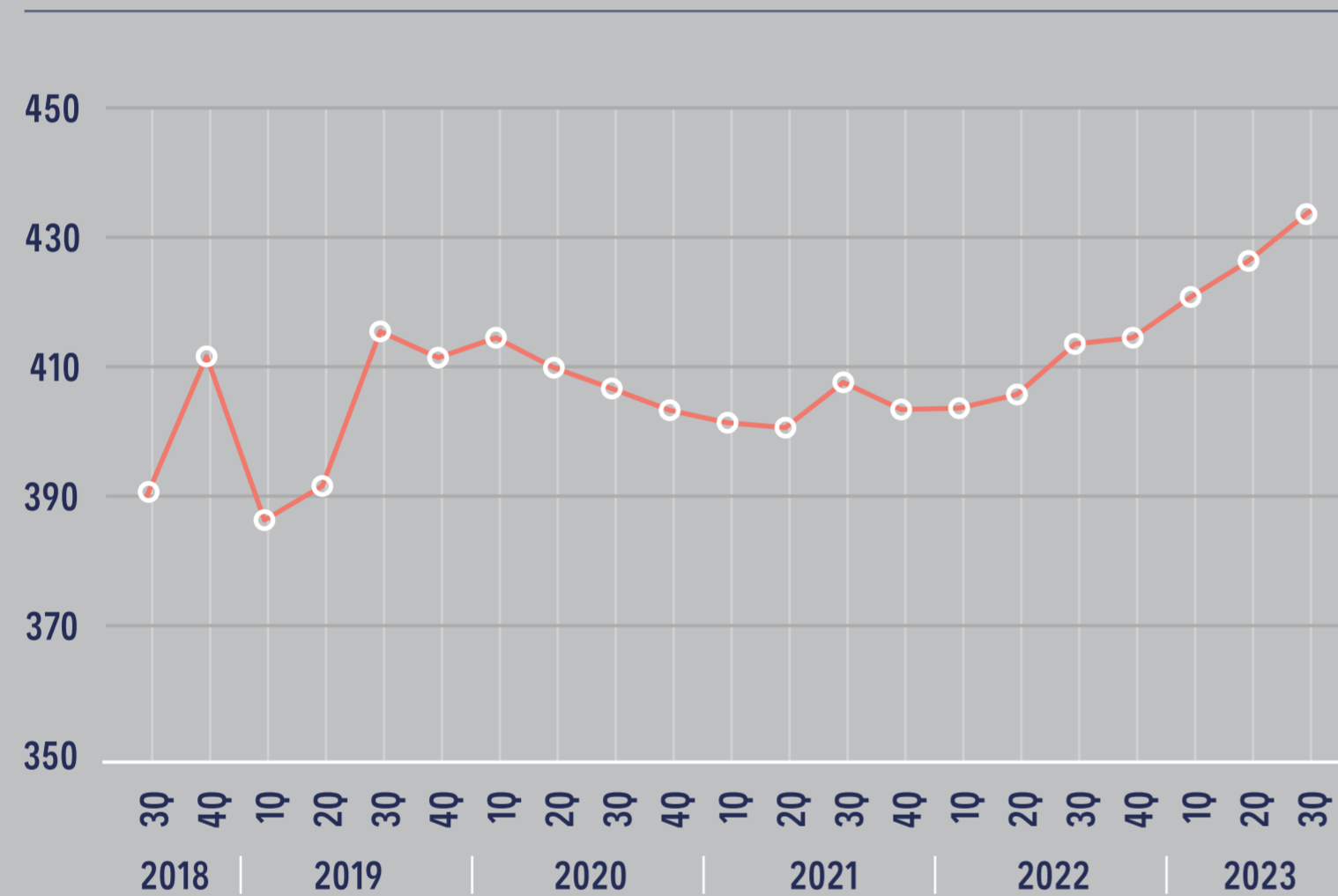


Source: Prepared by the authors with data from the National Banking and Securities Commission (Data base of financial inclusion), 2024.





### Evolution of financial branches in Querétaro (3Q 2018-3Q 2023)



Source: Prepared by the authors with data from the National Banking and Securities Commission (Data base of financial inclusion), 2024.  
 Note: 3Q refers to the third quarter.

Of the total number of financial branches in the state (434), 55.8% were commercial banks; 28.3% were savings and loan cooperatives; 10.4% were popular financial companies; and 5.5% were development banks.

The evolution of financial branches has been increasing. During the first quarter of 2018, the state had 385 financial branches, while by the third quarter of 2023 the figure amounted to 434, a value 1.6% higher than the immediately

preceding quarter and 4.8% higher than the same quarter of the previous year.

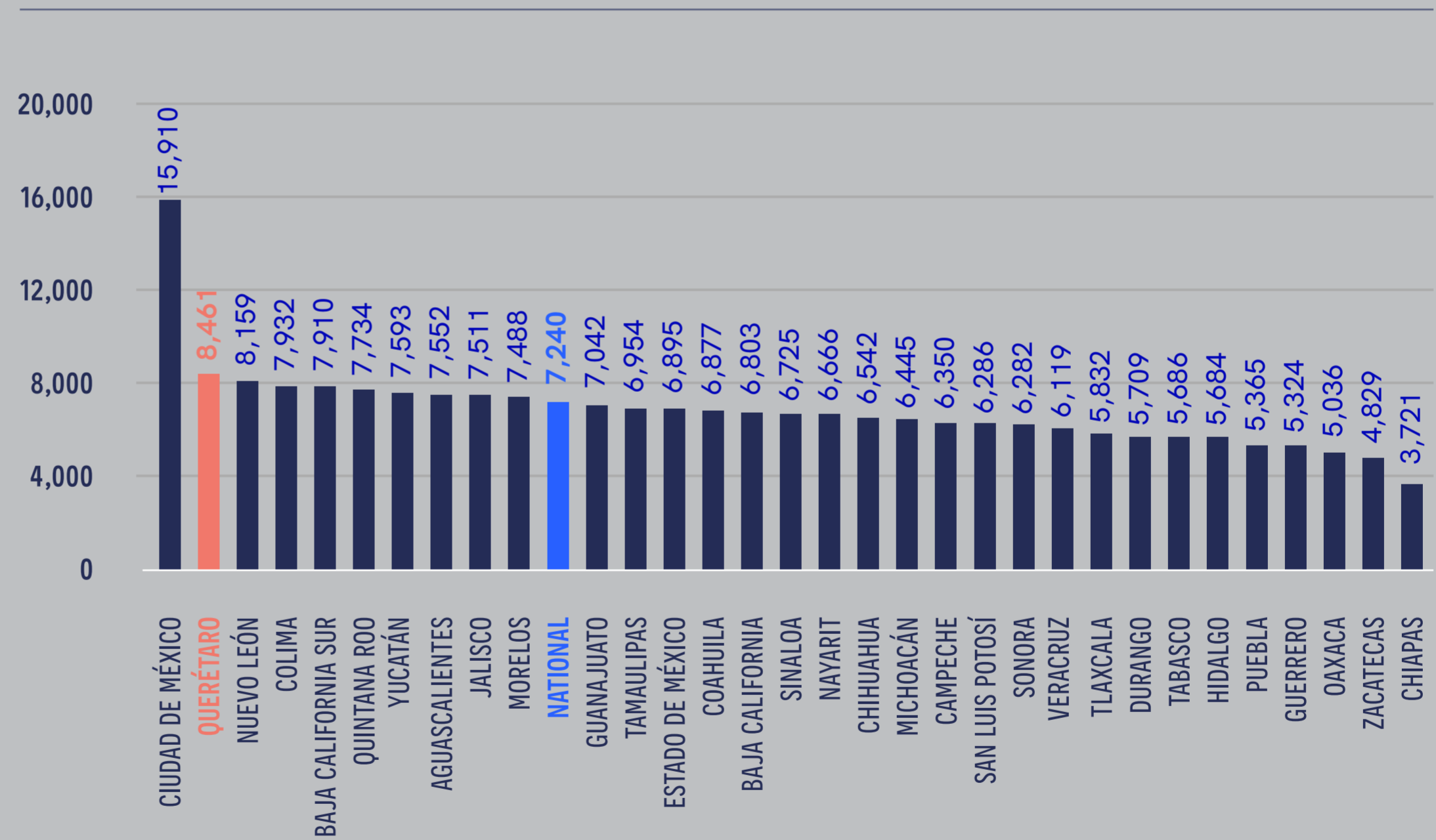




### Loans reported in Querétaro

In the third quarter of 2023, 70,091,913 loans were reported nationwide, it means 7,240 per 10,000 adults. In the case of Querétaro, there were 1,474,730, or 8,461 loans per 10,000 adults.

Credits per 10,000 adults per state (3Q 2023)



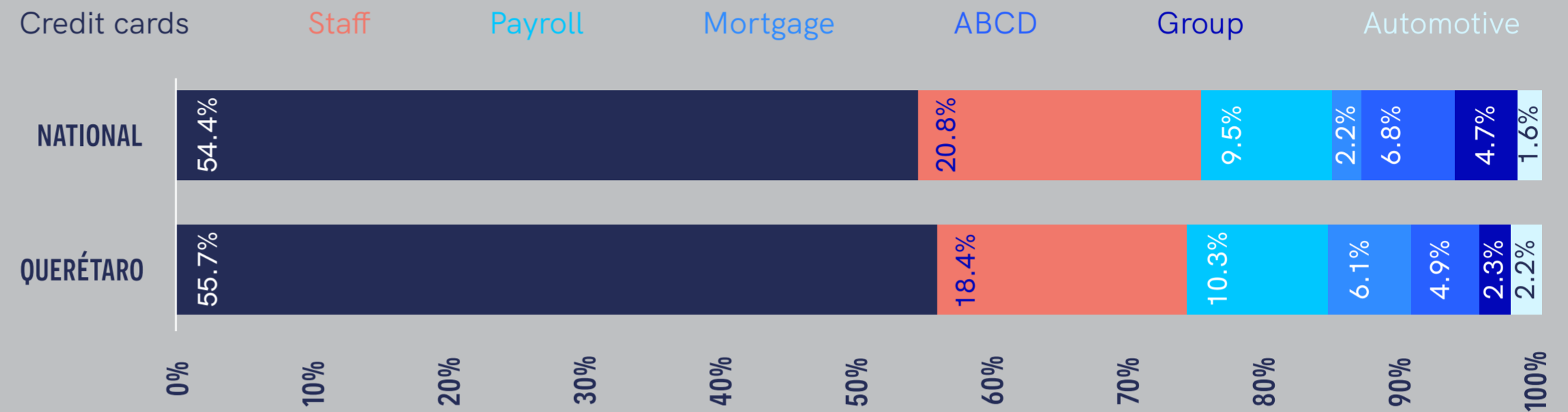
Source: Prepared by the authors with data from the National Banking and Securities Commission (Data base of financial inclusion), 2024. Note: 3Q refers to the third quarter.



Regarding loans granted to banks, credit cards accounted for more than 50% at both the national and state levels.

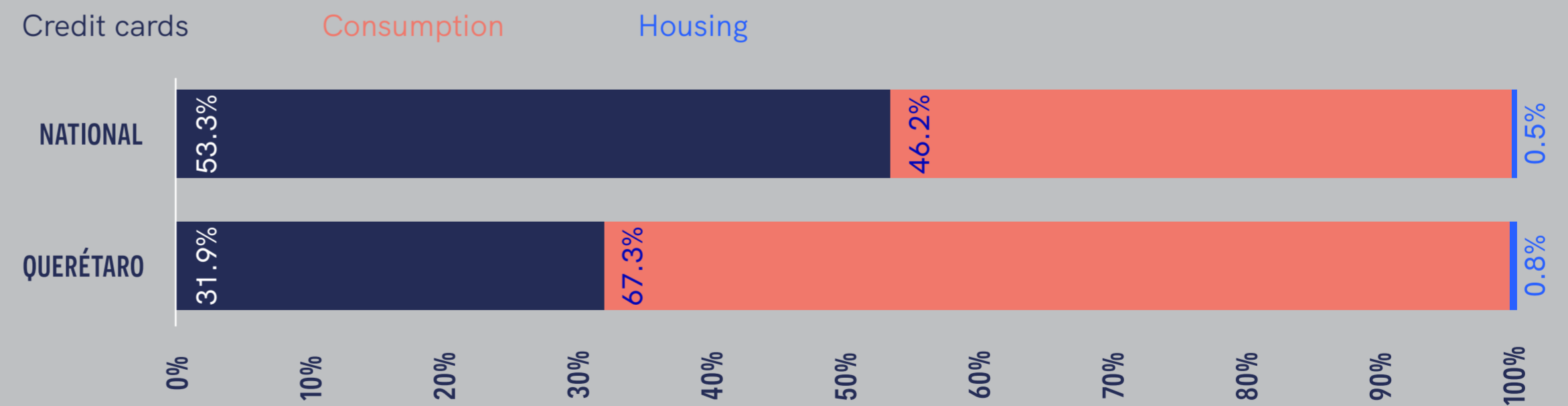
At the Public Savings and Loan institutions, nationwide, more than 50% of loans were granted through credit cards; however, at the state level, consumer loans were the most in demand.

### Distribution of bank loans in Queretaro and Queretaro National (3Q 2023)



Source: Prepared by the authors with data from the National Banking and Securities Commission (Data base of financial inclusion), 2024.  
Note: 3Q refers to the third quarter.

### Distribution of credits in EACP<sup>1</sup> in Querétaro and National (3Q 2023)

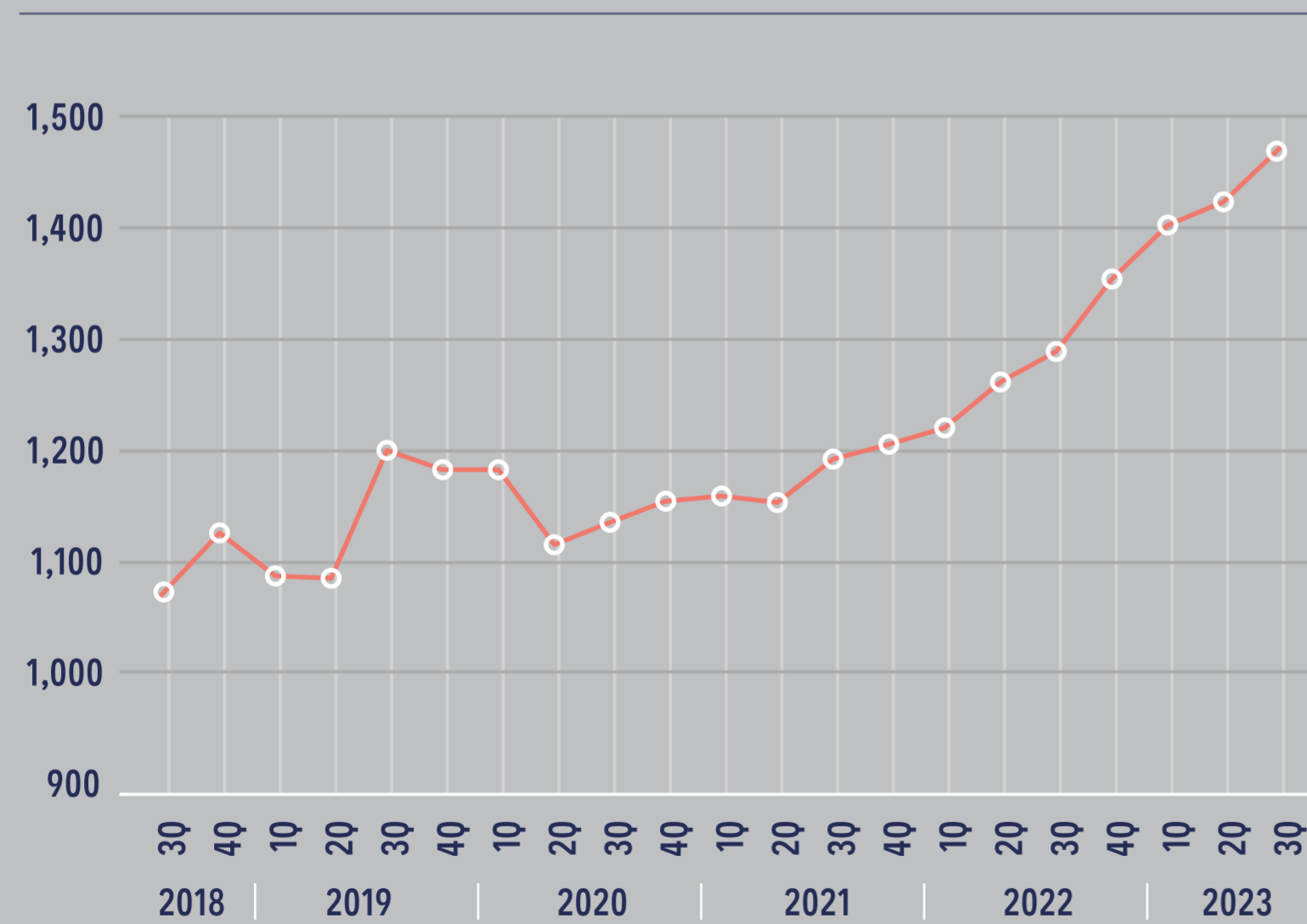


Source: Prepared by the authors with data from the National Banking and Securities Commission (Data base of financial inclusion), 2024.  
Note: <sup>1</sup> EACP (by its acronym in Spanish) refers to Popular Savings and Loan Institutions.  
3Q refers to the third quarter.



The evolution of registered loans has been increasing. During the first quarter of 2018, 1,030,486 loans were registered in the state, while by the third quarter of 2023 the figure amounted to 1,474,730, a value 3.3% higher than the immediately preceding quarter and 14% higher than the same quarter of the previous year.

Evolution of the number of loans registered in Querétaro (3Q 2018-3Q 2023)



Source: Prepared by the authors with data from the National Banking and Securities Commission (Data base of financial inclusion), 2024.  
Note: 3Q refers to the third quarter.



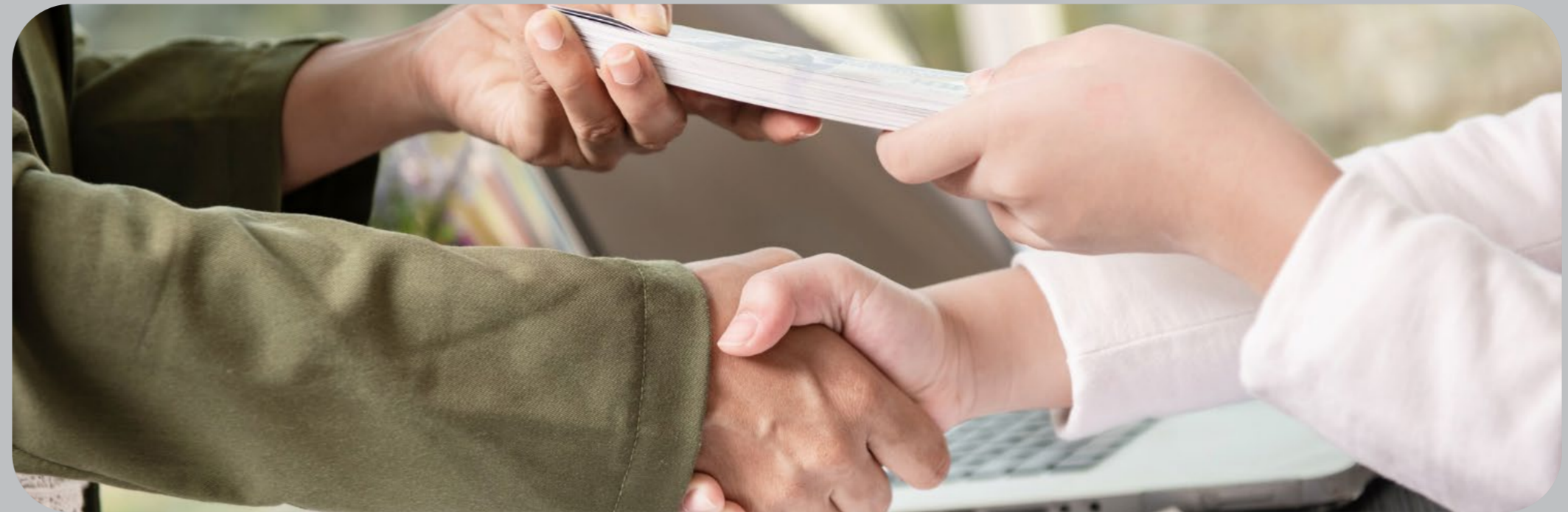


## Development Banking

These institutions of the Federal Public Administration are relevant because they have been a vehicle that promotes economic growth and social welfare through financing for the creation and expansion of productive enterprises with socially profitable projects.

In critical stages, when economic conditions are not optimal or there is market volatility that increases credit risk, development banking plays a fundamental role, as it becomes a tool that temporarily operates in a countercyclical manner, mitigating the effects of the reduction in private credit.

Until September 2023, according to the Bank of Mexico, development banks remained financially sound; they showed a favorable evolution in the main items of their financial statements, with a positive net income and a growing capitalization index.



### Development Banking Institutions

INSTITUTION	OBJECTIVE
National Bank for Foreign Trade (BANCOMEXT, by its acronym in Spanish)	To contribute to the development and generation of employment in Mexico through foreign trade financing.
National Bank of Public Works and Services (BANOBRAS, by its acronym in Spanish)	To contribute to the sustainable development of the country by promoting investment in infrastructure and public services and the financial and institutional strengthening of subnational entities.
National Bank of the Army, Air Force and Navy (BANJERCITO, by its acronym in Spanish)	To provide banking and credit services to members of the Mexican Army, Air Force and Navy and to the general public.
National Finance Bank (NAFIN, by its acronym in Spanish)	To contribute to the economic development of the country by facilitating access to financing and other business development services for MSMEs, entrepreneurs and priority investment projects.
Federal Mortgage Society (SHF, by its acronym in Spanish)	To promote the development of primary and secondary housing markets through guarantees or various financial instruments for the construction, acquisition and improvement of housing.
Welfare Bank (Banco del Bienestar)	To promote and facilitate savings among Mexicans, inside and outside the country, as well as access to first and second-tier financing in an equitable manner, promoting financial inclusion.

Source: Prepared by the authors with data from the institutions mentioned, 2024.



## Mexican Financial System (MFS)

The Financial System is a set of institutions, means and markets in which financial activity, such as savings and credit, is organized. Good management of the system generates opportunities for economic growth.

A financial system is considered stable when financial institutions and markets facilitate the exchange of funds between savers, debtors and investors. Stability also takes into account that the financial system is capable of withstanding shocks and, at the same time, contributes to maintaining an environment of macroeconomic stability and growth.

The MFS is the set of institutions that organize financial activity. Each of the organizations that structure the system has its own particular objectives:



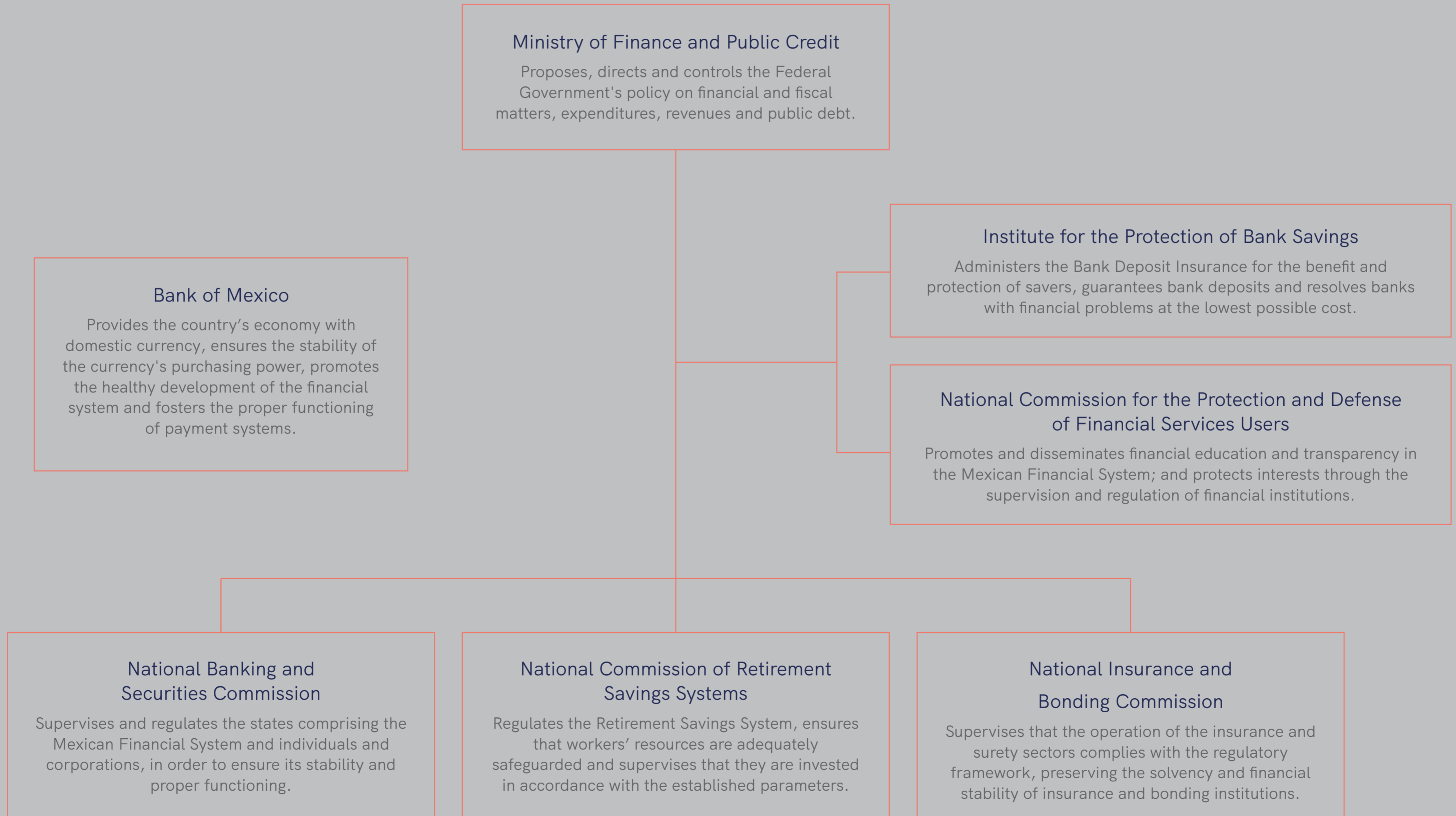
According to the Financial Stability Report published by the Bank of Mexico, for the second half of 2023, the MFS maintained a solid and resilient position, despite the complex and uncertain global macro-financial environment.

Among the main macro-financial risks that could jeopardize the stability of the financial system

are: 1) a greater or more prolonged tightening of financial conditions than expected, 2) a more pronounced or prolonged slowdown in the world economy than anticipated, 3) the occurrence of a systemic event affecting the global financial system, and 4) unexpected adjustments in credit ratings for the sovereign or Pemex.



### Mexican Financial System Structure





### 6.4.4

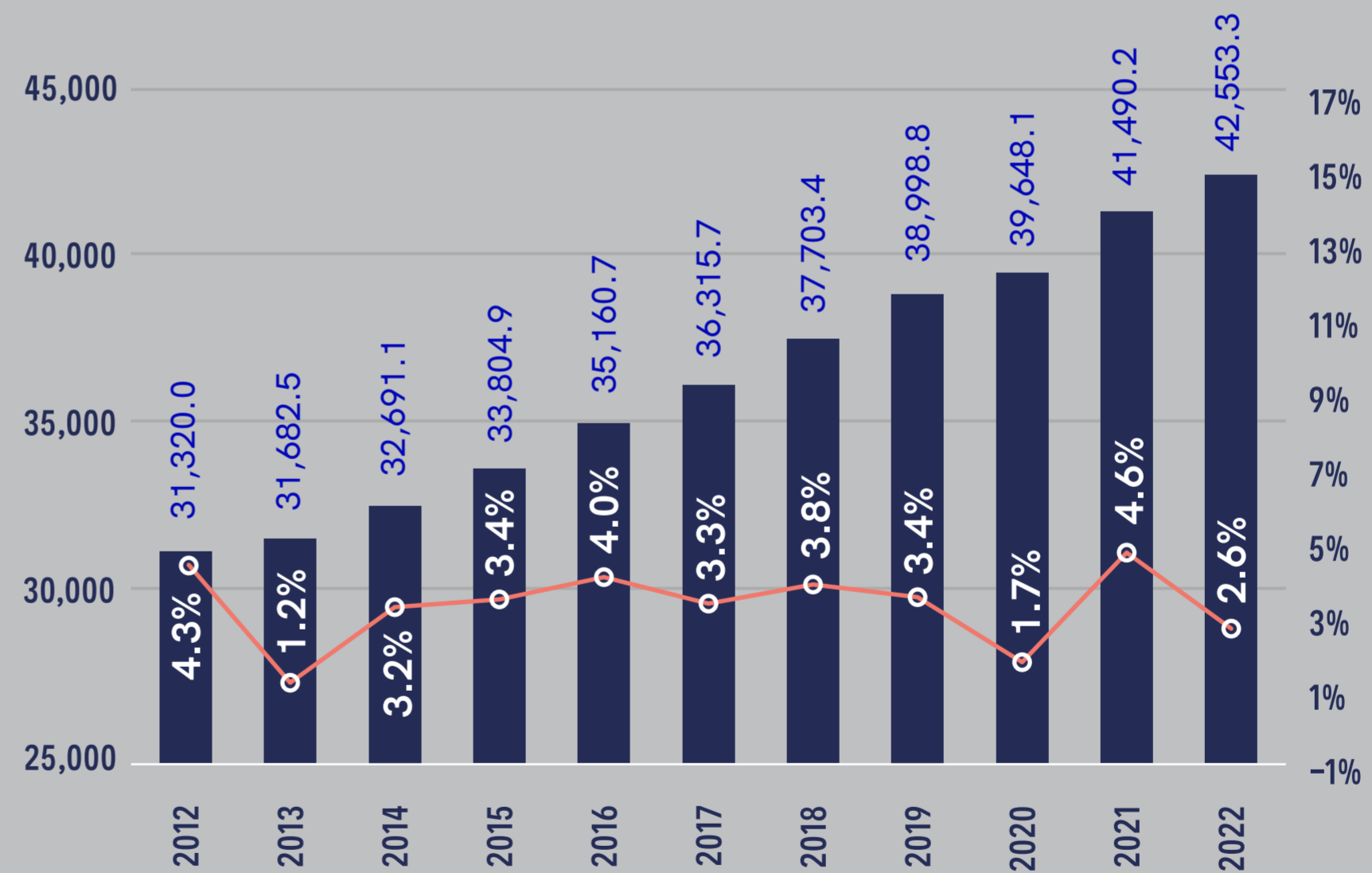
## Real estate and rental services

During 2022, real estate and rental services reported MXN \$42,553.3 MM at 2018 prices within the GDP in the state, which represents 7.2% of the total and of 14.5% of that reported by the tertiary sector. This figure represents an annual growth rate of 2.6%. The state is equivalent to 1.9% of the sector's GDP at the national level.

## Gross Domestic Product of the sector\* in Querétaro (2012-2022)

GDP Real estate services and rental of movable and intangible assets

Var. % previous year



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (GDP by state [PIBE]; 2018 base), 2024.

Note: Figures are expressed in millions of pesos in constant values.

\* Refers to Real estate services and rental of movable and intangible assets





At the end of 2023, the IMSS (by its acronym in Spanish) counted 3,703 people working in the sector, 14.7% more than in 2022, 37.2% of the workers were women and 62.8% were men. The average salary remained at \$407.32 for women and \$401.94 for men.

According to the DENUE (by its acronym in Spanish), Querétaro has 1,533 economic units dedicated to this sector, 92.3% of which are micro-enterprises, representing 1.6% of the total number of establishments in the state and 2.1% of establishments dedicated to this sector nationwide.

### Distribution of economic units in Real estate and rental services of personal property in Querétaro (2023)

SIZE	ESTABLISHMENTS	DISTRIBUTION
Micro	1,415	92.3%
Small	101	6.6%
Medium	15	1%
Big	2	0.1%
<b>Total</b>	<b>1,533</b>	<b>100%</b>

Source: Prepared by the authors with data from the National Institute of Statistics and Geography (National Statistical Directory of Economic Units), 2024.

## Registration of real estate agents and companies

Published in La Sombra de Arteaga, on December 6, 2016, is the regulation that aims to establish the bases for the certification and updating of real estate agents and companies and their registration in the state.

### Licenses and permits issued (2017-2023)

YEAR	LICENSES GRANTED TO REAL ESTATE AGENTS	PERMITS GRANTED TO REAL ESTATE COMPANIES
2017	157	6
2018	542	23
2019	507	5
2020	133	10
2021	209	8
2022	14	3
2023	112	9

Source: Prepared by the Ministry of Urban Development and Public Works, 2024.

During 2023, training courses on urban development were provided to three municipalities.

### Training courses (2023)

MUNICIPALITIES	HOURS
Tolimán	3
Tequisquiapan	3
San Juan del Río	4
<b>Total</b>	<b>10</b>

Source: Prepared by the Ministry of Urban Development and Public Works, 2024.



6.5

# Micro, small and medium-sized enterprises (MSMEs)

MSMEs are an engine of economic growth, sources of job creation and development nationwide. According to the 2019 Economic Census, nationwide 4,578,659 companies were MSMEs, representing 99.2% of the total.



## Criteria for the classification of MSMEs in Mexico

In Mexico, companies are classified in accordance with the provisions of the “Law for the Development of Competitiveness of Micro, Small and Medium-Sized Enterprises and the Agreement establishing the stratification of Micro, Small and Medium-Sized Enterprises.” For the stratification of MSMEs, this law only takes into account the number of workers.

## Stratification of the companies in Mexico according to the Law

SIZE	SECTOR		
	Industry	Commerce	Services
<b>Micro</b>	From 0 to 10	From 0 to 10	From 0 to 10
<b>Small</b>	From 11 to 50	From 11 to 30	From 11 to 50
<b>Medium</b>	From 51 to 250	From 31 to 100	From 51 to 100

Source: Prepared by the authors with data from Official Gazette of the Federation (last reform published on August 13, 2019; Law for the Development of Competitiveness of Micro, Small and Medium-Sized Enterprises), 2024.



### Stratification of the companies in Mexico according to the agreement

The agreement, on the other hand, establishes stratification by both the number of employees and the amount of annual sales and the combined cap, i.e., “combined cap = (Employees) X 10% + (Annual Sales) X 90%”.

SIZE	SECTOR	NUMBER OF WORKERS	RANGE OF ANNUAL SALES AMOUNT (MILLION PESOS)	COMBINED MAXIMUM LIMIT
Micro	All	0-10 persons	Up to \$4	4.6
	Commerce	11-30 persons	From \$4.01 to \$100	93
Small	Industry and Services	11-50 persons		95
	Medium	Commerce	31-100 persons	From \$100.01 to \$250
Services		51-100 persons	250	
Industry		51-250 persons	250	

Source: Prepared by the authors with data from the Official Gazette of the Federation (June 30, 2009; Agreement establishing the stratification of micro, small and medium-sized companies), 2024.



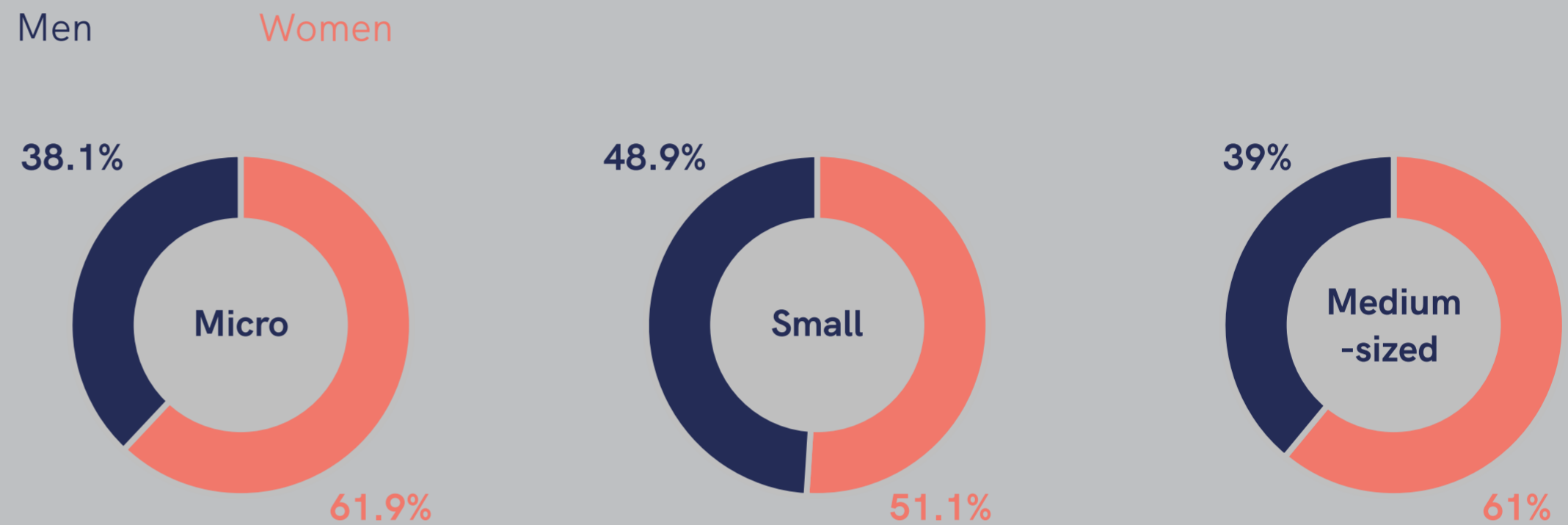
### Employed population

According to the National Occupation and Employment Survey (ENOE, by its acronym in Spanish), in Querétaro, during 2023, 658,933 people carried out their activities in MSMEs—that is, 58.5% of the employed population in the state—a figure 7.4% higher than that reported in 2022.

Of the population employed in MSMEs, 40.2% were women and 59.8% were men; the trend is similar when analyzing the participation by sex and size of establishment broken down

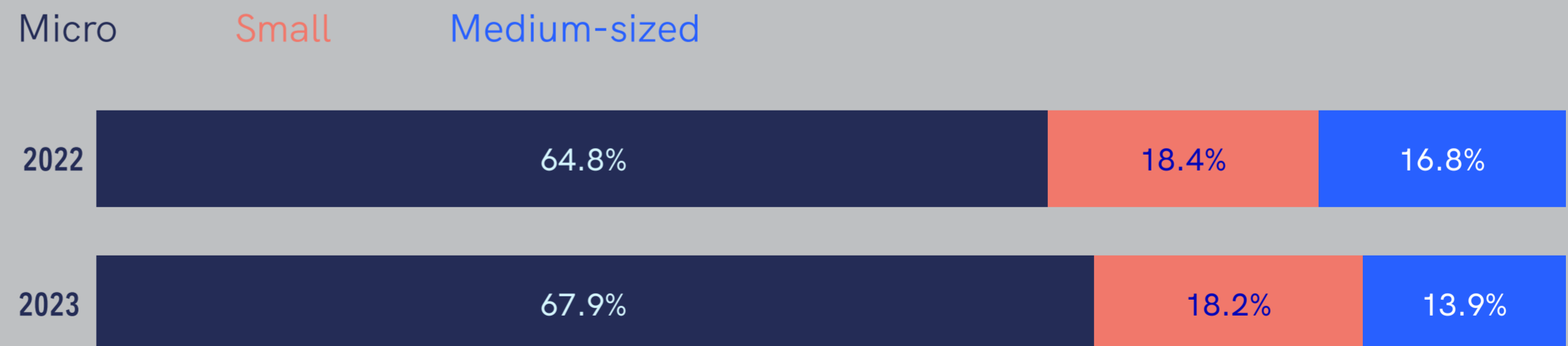
By size of establishment, 447,480 were concentrated in micro establishments, 120,068 in small establishments and 91,386 in medium-sized establishments.

### Distribution of the employed population in MSMEs by sex in Querétaro (2023)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (National Occupation and Employment Survey), 2024.

### Distribution of the employed population in MSMEs in Querétaro (2022-2023)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (National Occupation and Employment Survey), 2024.



## Job positions

IMSS (by its acronym in Spanish ) classifies establishments according to the size of the employer registry. For this purpose, the classification of MSMEs considered employer registries of 1 to 250 employees.

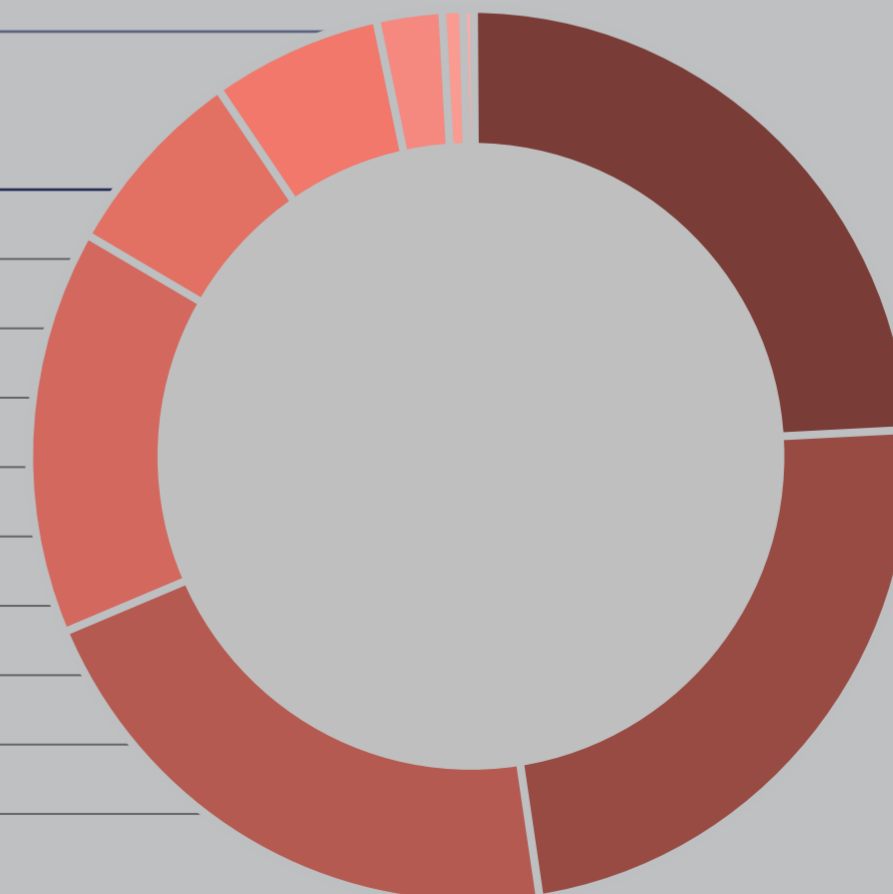
In December 2023, there were 369,976 people formally working in MSMEs in the state, 37.3%

being women and 62.7% men. The average salary remained at \$436.92 pesos for women and \$495.63 for men.

Of the total number of jobs, the largest number is concentrated in the business, personal and home services, processing industries and commerce sectors.

### Distribution of jobs in MSMEs by sector in Querétaro (December 2023)

SECTOR	DISTRIBUTION	VAR. % (2023 - 2022)
Services for businesses, individuals and the home	24.2%	0.7%
Transformation industries	23.5%	4.7%
Commerce	21.1%	3.0%
Construction industry	14.7%	7.1%
Transportation and communication	7.1%	5.1%
Social and community services	6.2%	3.9%
Agriculture, livestock, forestry, fishing and hunting	2.4%	-3.2%
Extractive industries	0.5%	10.3%
Electric power industry and drinking water collection and supply	0.4%	10.7%



Source: Prepared by the authors with data from the Mexican Social Security Institute, 2024.



## Economic units

According to the National Statistical Directory of Economic Units, in Querétaro the MSMEs represented 98.9% of the total of establishments. Of these, 45.7% were in the commerce sector and 43.9% in the services sector.

## Establishments by sector in Querétaro (2023)

ACTIVITY	SECTOR	ESTABLISHMENTS	ESTABLISHMENTS BY ACTIVITY
Primary	Agriculture	53	53
	Mining	141	
Secondary	Generation, transmission and distribution of electric power, water and gas supply through pipelines to the final consumer	85	9,014
	Construction	644	
	Manufacturing companies	8,144	
	Wholesale trade	3,909	
	Retail trade	37,787	
	Transportation, post and storage	797	
	Information in mass media	387	
	Finance and insurance services	2,282	
	Real estate services and rental of movable and intangible assets	1,531	
Tertiary	Professional, scientific and technical services	2,530	85,070
	Corporate	13	
	Business support services and waste management and remediation services	1,485	
	Education services	2,304	
	Health and social assistance services	5,016	
	Recreational, cultural and other entertainment services	945	
	Temporary accommodation services and food and beverage preparation services	13,163	
	Other services, except governmental activities	12,921	
	<b>Total</b>		

Source: Prepared by the authors with data from the National Statistical Directory of Economic Units, 2024.



Micro-establishments represented 90.5% of the total number of establishments in the state, followed by small establishments with 6.4% and medium-sized establishments with 1.4%.

### Establishments according to the stratification of the Law for the Development of Competitiveness of Micro, Small and Medium-Sized Enterprises

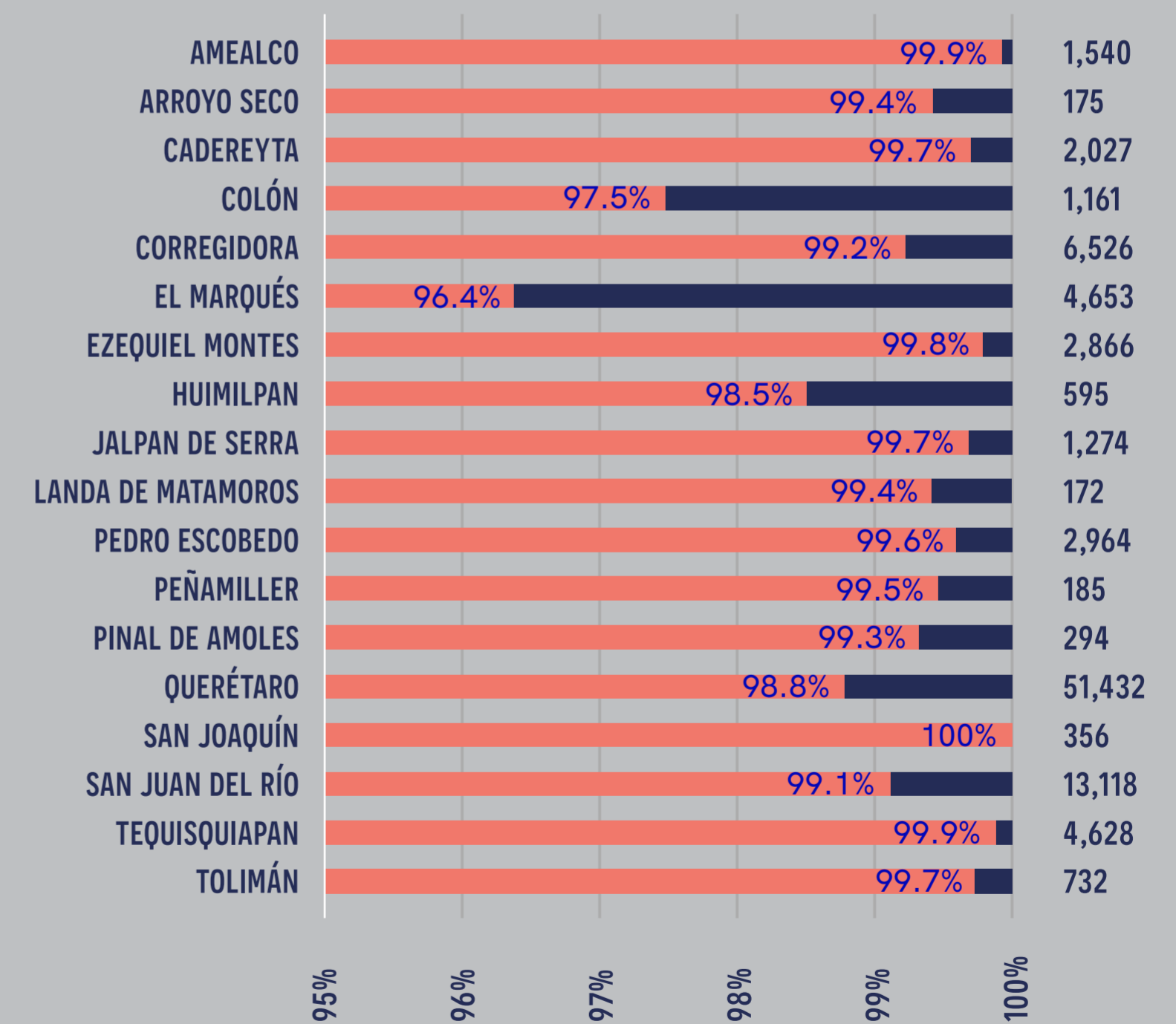
SIZE OF ESTABLISHMENT	NUMBER OF ESTABLISHMENTS				PARTICIPATION BY SIZE OF ESTABLISHMENT
	Industry	Commerce	Services	Total	
Micro	7,435	39,696	39,483	86,614	90.5%
Small	1,123	1,508	3,515	6,146	6.4%
Medium	509	492	376	1,377	1.4%

Source: Prepared by the authors with data from the National Statistical Directory of Economic Units, 2024.

Note: Agricultural activities were considered in the industry category.

Throughout the state's municipalities, more than 95% of the establishments were MSMEs. In San Joaquín, 100% of its establishments were in this category, while El Marqués reported the lowest proportion.

### Proportion of MSMEs regarding the total establishments by municipality in Querétaro (2023)



Source: Prepared by the authors with data from the National Statistical Directory of Economic Units, 2024.



## 6.6

# Support and promotion of companies

At both the national and state level, the presence of MSMEs is widespread and, as a result, they have a significant impact on the number of people employed, as well as on formal jobs and economic units. Despite their relevance in the economy, they maintain a high level of vulnerability to unstable scenarios, so the creation of policies to reduce economic disturbances and, therefore, their permanence in the market must be an element to be taken into consideration.

## 6.6.1.

## Direction of Support to SMEs

The Ministry of Sustainable Development, through the Direction of Support to SMEs, seeks to have a direct impact on the development of MSMEs, from the stage of entrepreneurial ideas, to the acceleration of projects, professionalization of companies, training and export of goods, in conjunction with chambers, associations, universities and research centers.

In order to meet the aforementioned objectives, the Directorate offers the public temporary support programs, which are listed below:

### Competitiveness program

It offers integral attention to entrepreneurs in order to increase their productivity and competitiveness through training, consulting and advisory services, with the objective of developing their skills and competencies.



### Results 2023:

- ▶ Promotion of 30 projects
- ▶ Benefiting 967 people

### State of Querétaro Economic Development Program (Guarantee Fund)

Its purpose is to facilitate financing for MSMEs in strategic sectors in Querétaro. In 2023, the government contributed 9 million pesos—an amount that was used for guarantee coverage with financial institutions—and a total purse of 703.2 million pesos was achieved, benefiting 330 companies in the state.



## Business Merit Award

The award annually recognizes those organizations, companies and institutions that distinguish themselves throughout the year by promoting competitiveness, participation in foreign trade, corporate social responsibility, sustainability and the environment, as well as research and technological development.

### Categories, organizers and winners (2023)

CATEGORY	ORGANIZER	WINNER
Foreign commerce	ITP México Fabricación S.A. de C.V.	1. Tetra Pak Querétaro S.A. de C.V. 2. Danfoss Power Solutions S. de R.L. de C.V.
Competitiveness	Tetra Pak Querétaro S.A. de C.V.	1. Ingredion México S.A de C.V.
Social responsibility	Manufacturas Kaltex S.A. de C.V.	1. Fomento Inmobiliario y de Servicios de Querétaro S.A de C.V.
Sustainability and environmental responsibility	Danfoss Power Solutions S. de R.L. de C.V.	1. Manufacturas Kaltex S.A. de C.V.
Science and Technology	National Autonomous University of Mexico, Juriquilla Campus	1. Technological University of Querétaro 2. College of Scientific and Technological Studies of the State of Querétaro (CECyTEQ)

Source: Prepared by the authors with data from the Direction of Support to SMEs, 2024.



In addition, 3 special recognitions are awarded:

### Awards by category (2023)

ENTREPRENEUR OF THE YEAR	EXECUTIVE OF THE YEAR	ENTREPRENEUR OF THE YEAR
Adriana Luna Díaz	Adriana Macouzet Flores	Italia Prado Farías
General Director Tierra de Monte	Latin America Vicepresident PPG Industries de México S.A de C.V.	General Director Healthy Brand

Source: Prepared by the Direction of Support to SMEs, 2024.



## Disexport Program

Through this program, students in their final semesters of the Graphic Design and Industrial Design degrees at the University of the Valley of Mexico (UVM, by its Spanish acronym), Querétaro Campus, supported the development of logos, packaging and labels for products of MSMEs in Querétaro.

### Results 2023:

63 companies benefited.

## Courses and forums

In order to provide information and training to micro, small and medium-sized entrepreneurs, conferences, courses and virtual workshops are held in the areas of foreign trade, sales, information technology, intellectual property, and administration, among others.

### Results 2023:

- ▶ Participation of 926 persons
- ▶ 31 workshops and conferences given.
- ▶ 2 logistic forums with 687 attendants.



## Program for the professionalization of companies (PRO-ENTERPRISE)

It consists of granting support to SMEs, which is provided through partial reimbursement, in order to increase their competitive situation and meet the requirements demanded by large purchasing companies.

40 requests for reimbursement support for certifications, bar codes, nutritional table, web page, etc. were attended.

## Business meetings

The Government of Querétaro is organizing business meetings aimed at the commerce, services and agribusiness sectors to enable companies in the state to join supply chains and increase or diversify their sales.

In 2023, a business meeting was held between 30 national and state buyers, as well as 213 suppliers from Querétaro, achieving 358 business appointments, favoring the tourism sector, buyers from the Government Sector of the State of Querétaro and large automotive companies.



## 6.7

# Directory of chambers and associations of the sector

The Ministry of Sustainable Development works together with the Chambers and Associations to strengthen the development of companies in the state and, in this way, boost economic growth.

The following table provides data on the chambers and associations related to the tertiary sector in Querétaro.

CHAMBER OR ASSOCIATION	ACRONYM	ADDRESS	WEB PAGE	TELEPHONE
Association of Industrial Relations Executives, A.C.	AERI	Av. Antea 1130 Int. 1610, Level, Juriquilla, Querétaro, Qro. C.P. 76230	<a href="http://www.aeri.com.mx">www.aeri.com.mx</a>	442 644 0235
Association of Industrial SMEs of Querétaro, A.C.	AMIQRO	Calle Agustín Melgar No. 35. Colonia Niños Héroes. Querétaro, Qro. C.P. 76010	<a href="http://www.amiqro.com">www.amiqro.com</a>	442 448 0367
Mexican Association of Real Estate Professionals of the State of Queretaro, A.C.	AMPI QRO	Calle Senda de la Inspiración No. 6, local 11. Colonia Milenio III. Querétaro, Qro. C.P. 76060	<a href="http://www.ampiseccionqueretaro.com">www.ampiseccionqueretaro.com</a>	442 790 0916
Queretaro Association of Hoteliers, A.C.	AQH	N.D.	<a href="http://www.aqh.org.mx">www.aqh.org.mx</a>	442 248 5303
Mexican Chamber of the Construction Industry, Querétaro Branch	CMIC QRO	Calle Río Yaqui No. 101. Colonia Lomas de San Pablo. Querétaro, Qro. C.P. 76125	<a href="http://www.cmicqro.org">www.cmicqro.org</a>	442 220 6408
National Chamber of Small Commerce of Querétaro	CANACOPE QRO	Calzada de los Arcos No. 160. Colonia Loma Dorada. Querétaro, Qro. C.P. 76060	<a href="http://www.canacope.mx">www.canacope.mx</a>	442 223 2803
National Chamber of Commerce, Services and Tourism in Querétaro	CANACO QRO	Av. Luis Vega y Monroy No. 405. Colonia Quinta Balaustradas. Querétaro, Qro. C.P. 76079	<a href="http://www.concanaco.com.mx">www.concanaco.com.mx</a>	442 537 5301
National Chamber of Commerce, Services and Tourism of San Juan del Río	CANACO SJR	Francisco Javier Mina #72, Col. Centro, San Juan del Río, Qro, C.P. 76800	NA	427 129 9995



CHAMBER OR ASSOCIATION	ACRONYM	ADDRESS	WEB PAGE	TELEPHONE
National Chamber of Consulting Firms in Querétaro	CNEC QRO	N.D.	<a href="http://www.cnec.org.mx">www.cnec.org.mx</a>	55 9000 0522
National Chamber of the Housing Development and Promotion Industry, Querétaro Branch	CANADEVI QRO	Manuel Gómez Morín 3970 Int.200, Centro Sur, 76090, Querétaro, Qro.	<a href="http://www.canadevi.com.mx">www.canadevi.com.mx</a>	442 595 3243
National Chamber of the Restaurants and Seasoned Food Industry of the State of Querétaro	CANIRAC QRO	Av. Luis Vega y Monroy No. 405. Colonia Quinta Balaustradas. Querétaro, Qro. C.P. 76079	<a href="http://www.caniracqueretaro.org">www.caniracqueretaro.org</a>	442 109 3093
National Chamber of the Transformation Industry, Delegación Querétaro	CANACINTRA QRO	Av. 5 de Febrero No. 308 Nte. Colonia Parque Industrial Jurica. Querétaro, Qro. C.P. 76120	<a href="http://www.canacintraqro.org.mx">www.canacintraqro.org.mx</a>	442 108 9650
National Chamber of the Transformation Industry, San Juan del Río Branch	CANACINTRA SJR	Eje Nte Sur esq ote 6, Nuevo Parque Industrial San Juan del Rio, Qro.	<a href="https://canacintrasjr.org.mx/">https://canacintrasjr.org.mx/</a>	427 1011003
Industrial Club of Querétaro, A.C.	CIQ	Calle Estadio No. 113. Fraccionamiento Colinas del Cimatario. Querétaro, Qro. C.P. 76090	<a href="http://www.ciq.com.mx">www.ciq.com.mx</a>	442 368 0300
College of Public Brokers of the State of Querétaro, A.C.	N.A.	Av. Ignacio Zaragoza No. 330 Pte. Colonia Niños Héroeos. Querétaro, Qro. C.P. 76010	<a href="http://www.corredorespublicosmx.org">www.corredorespublicosmx.org</a>	"442 215 1825 442 215 18 29 "
Business Centre of the State of Querétaro, S.P.	COPARMEX QRO	Av. Fray Luis de León No. 1501. Fraccionamiento Centro Sur. Querétaro, Qro. C.P. 76090	<a href="http://www.coparmexqro.org">www.coparmexqro.org</a>	442 248 2150
Mexican Business Council for Foreign Trade, Investment and Technology, A.C.	COMCE QRO	Circuito el Marqués Sur No. 1-A, Parque Industrial El Marqués, 76246, El Colorado, Querétaro	<a href="http://www.comcequeretaro.org.mx">www.comcequeretaro.org.mx</a>	427 152 0237
Federation of Professional Associations and Colleges of the State of Querétaro, A.C.	FECAPEQ	Calle Estadio No. 114. Fraccionamiento Centro Sur. Querétaro, Qro. C.P. 76069	<a href="http://www.fecapeq.org.mx">www.fecapeq.org.mx</a>	442 229 0619
Regional Livestock Union of Querétaro	UGRQ	Antiguo Camino a México km 1.9 Col. Cumbres de Conín. El Marqués, Qro.	<a href="http://www.ugrq.org.mx">www.ugrq.org.mx</a>	442 277 4663

Sources: Prepared by the Direction of Support to SMEs, 2024.



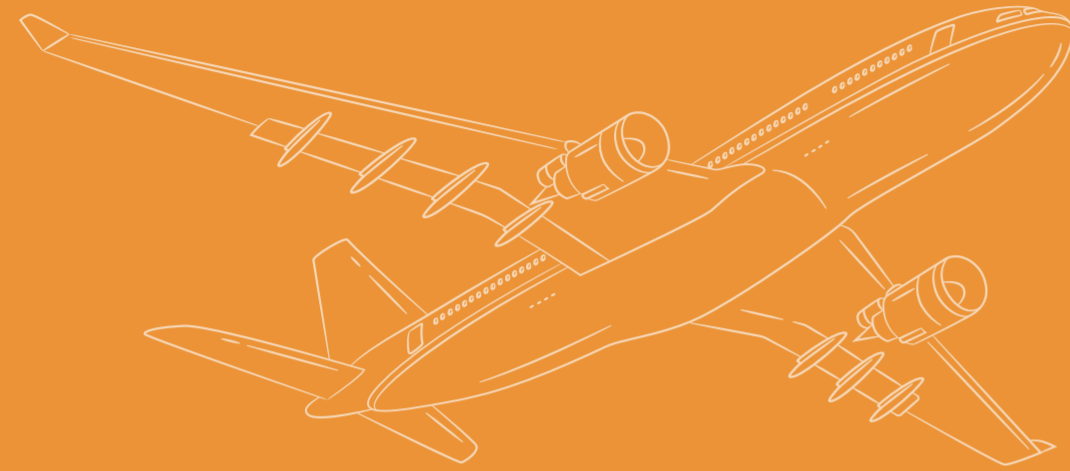
## 7

## Tourism and culture

Querétaro stands out as a tourist destination for its historical, architectural, and natural wealth, also because of its cultural diversity, handicraft production and the quality of its services.



# 7 Tourism and culture



## 7.1 Tourism

- 7.1.1 Touristic development
- 7.1.2 Hotel sector
- 7.1.3 Tourist services

## 7.2 Culture

- 7.2.1 Cultural infrastructure
- 7.2.2 Cultural heritage
- 7.2.3 Cultural identity
- 7.2.4 Cultural and artistic offerings



# TOURISM AND CULTURE

2,499,997  
TOURISTS IN 2023

4,724

HISTORICAL  
MONUMENTS

430

CULTURAL  
FACILITIES

1,404

LODGING  
ESTABLISHMENTS

7

MAGIC  
TOWNS

3

WORLD  
HERITAGE SITES

7.9%

FOREIGN  
TOURISM





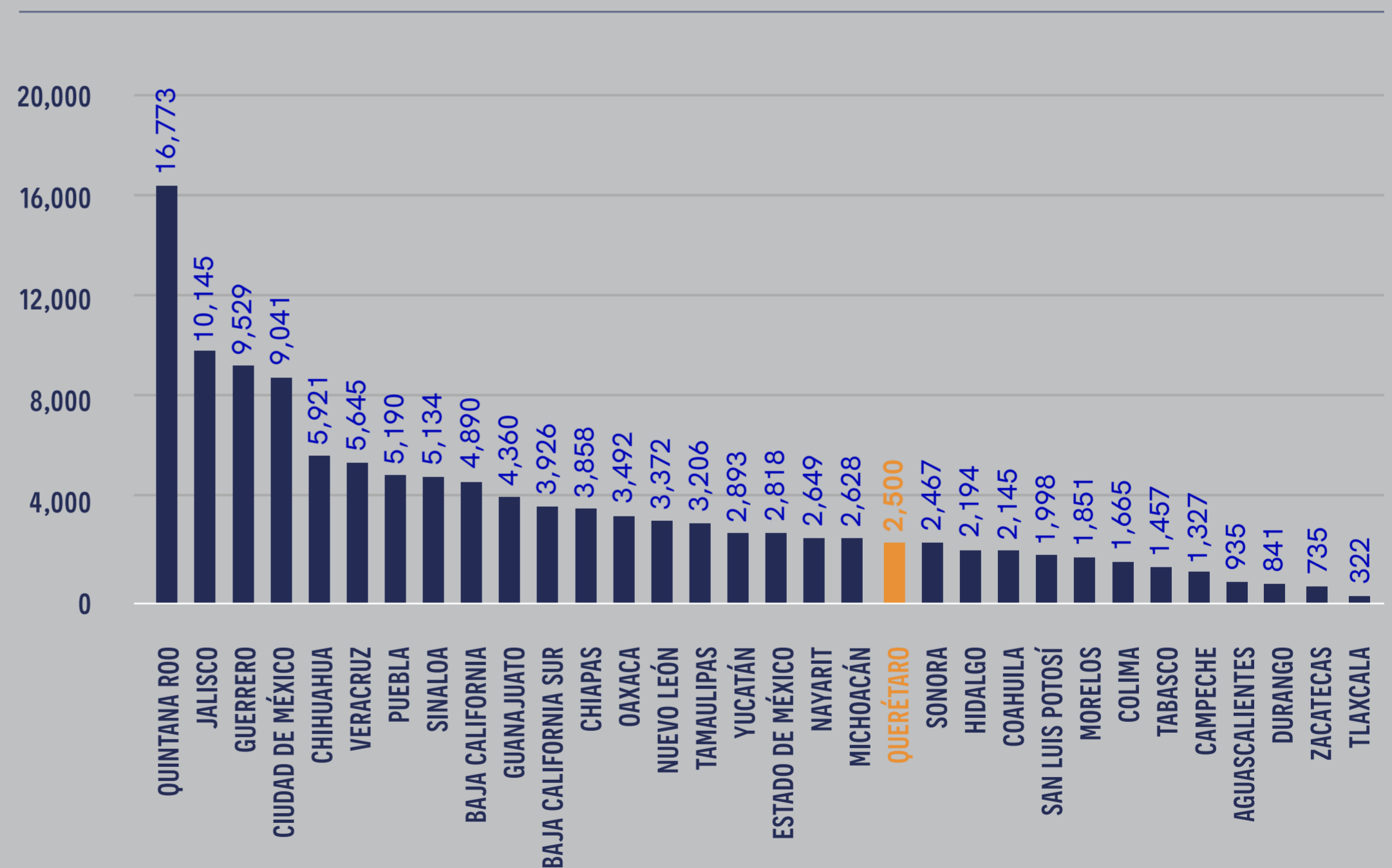
7.1

# Tourism

During 2022, 125,906,812 tourists arrived in the country, a figure 30.2% higher than that reported during 2021. Querétaro registered

2,499,997 tourists arriving in the state, representing 2% of the national total.

### Tourist arrivals by state (2022)



Source: Prepared by the authors with data from the Ministry of Tourism (Mexico Tourism Statistical Compendium 2022), 2024. Note: Figures are expressed in thousands of tourists.

7.1.1

## Touristic development

One of the main objectives of the State Development Plan 2021-2027 is to place Querétaro among the main non-beach tourist destinations. The actions that stand out to meet this objective are:

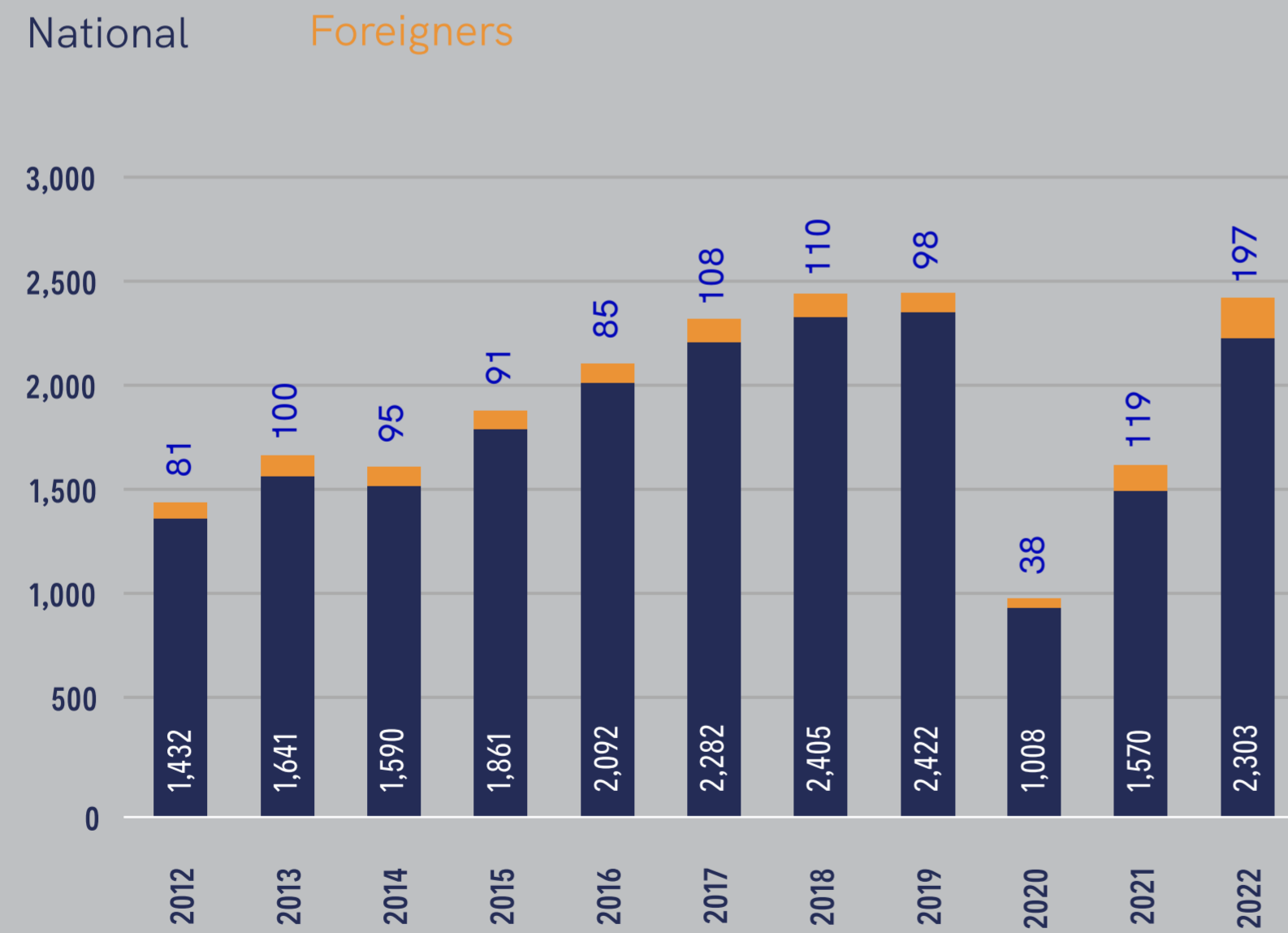
1. To innovate in the supply of tourist attractions.
2. To promote sustainable tourism.
3. To link tourism routes with regional vocations.





Of the total number of tourists in the entity during 2022, 92.1% was domestic tourism and 7.9% was foreign.

### Domestic and foreign tourist arrivals in Querétaro (2012-2022)



Source: Prepared by the authors with data from the Ministry of Tourism (Mexico Tourism Statistical Compendium 2022), 2024.

Note: Figures are expressed in thousands of tourists.





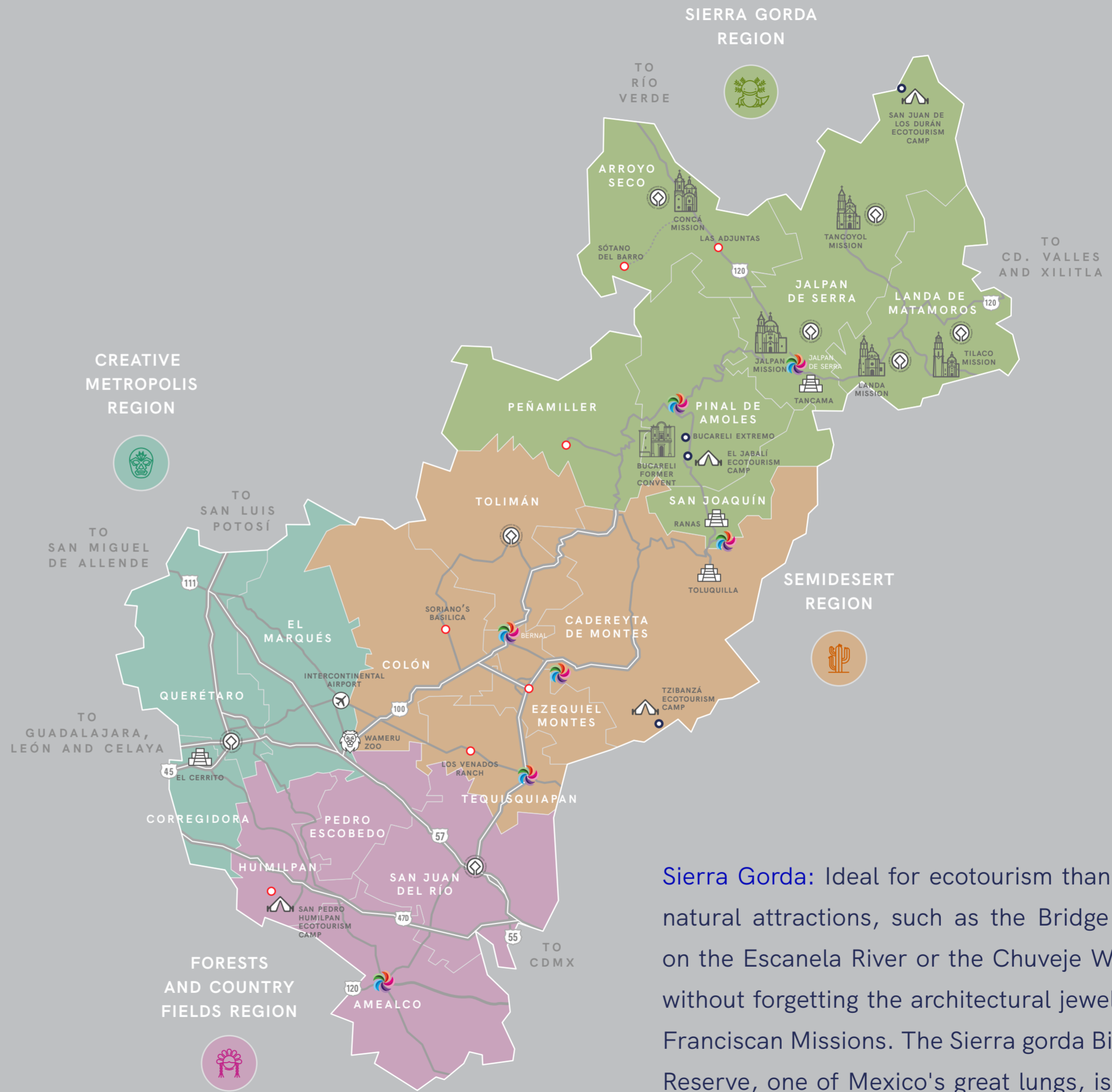
## Tourist destinations and attractions

Querétaro has four regions that make up a mixture of attractions:

**Creative Metropolis:** The historic center of the city of Querétaro is the cradle of Mexico's Independence and a UNESCO World Cultural Heritage Site since 1996. Here modernity and cultural heritage converge.

**Semidesert:** Home to the production of a wide variety of wines and cheeses, many of which have won awards worldwide. Among its attractions are the beauty of the vineyards and the charm of the magical towns.

**Forests and Country Fields:** Located in the municipalities of Huimilpan and Amealco de Bonfil, they offer unique natural landscapes that allow for activities such as hiking and cabin stays.



**Sierra Gorda:** Ideal for ecotourism thanks to its natural attractions, such as the Bridge of God on the Escanela River or the Chuveje Waterfall, without forgetting the architectural jewels of the Franciscan Missions. The Sierra gorda Biosphere Reserve, one of Mexico's great lungs, is located within the region.



## Magic Towns of Querétaro

These are places that have a variety of symbolic attributes, legends, history, transcendent events and everyday life, from which each of their socio-cultural manifestations emanate and which represent a great opportunity for tourism development.

The program that recognizes the Magical Towns was founded in 2001, with the objective of promoting tourism in regions and localities throughout the Mexican Republic; at a national level it has 122 towns registered, 7 of them located in the state.

The Magical Towns located in the state are: Amealco de Bonfil, Cadereyta de Montes, Jalpan de Serra, San Joaquín, Tequisquiapan and, in 2023, Pinal de Amoles were added to the list. All of these towns have unique historical sites and amazing natural areas.



### Bernal

Located in the municipality of Ezequiel Montes, it was the first Magical Town in Querétaro, entering the program in 2005. The Peña de Bernal, which is a monolith over 280 meters high, is located there; in 2009 it was added to UNESCO's list of Intangible Heritage of Humanity.

#### Festivities:

- ▶ Festivities of San Sebastian, patron saint of Bernal (January).
- ▶ Spring Equinox (March).
- ▶ Feast of the Holy Cross (May).

#### Attractions:

- ▶ Chapel of Las Ánimas.
- ▶ Mask Museum.
- ▶ Peña de Bernal.
- ▶ Temple of San Sebastián Mártir.



## Jalpan de Serra

Recognized as a Magic Town in 2010, it is located in the heart of the Sierra Gorda of Querétaro. It houses two of the five Franciscan missions, which were declared Cultural Heritage of Humanity by UNESCO in 2003, the Jalpan Mission, located in front of the main square, and the Tancoyol Mission, with a facade that stands out for its complexity and details.

### Festivities:

- ▶ Festivity of Santo Niño de Jalpan (January).
- ▶ Serrana Regional Fair (April).
- ▶ Patronal Feast of the Lord Santiago (July).
- ▶ Festivity of St. Francis of Assisi (October).

### Atractivos:

- ▶ Jalpan Dam.
- ▶ Tancama Archaeological Zone.a.



## Cadereyta de Montes

Magic Town since 2011. It was founded in 1640 as the Villa de Cadereyta and was a strategic point for the Spanish during the conquest of the region. Currently, it is considered the land of barbacoa and pulque.

### Festivities:

- ▶ Feast of San Gaspar (February).
- ▶ Barbacoa and pulque fair (June).
- ▶ Feast of Our Lady of Refuge (July).
- ▶ Annual Fair (September).

### Attractions:

- ▶ Caracol Canyon.
- ▶ Tzibanzá Island.
- ▶ Botanical Gardens.
- ▶ El Aguacate Springs.
- ▶ Parish of San Pedro and San Pablo





## Tequisquiapan

Founded in 1551 and named Magic Town in 2012, it stands out for its picturesque historic center and for being part of the Art, Cheese, and Wine Route. Every year the emblematic Cheese and Wine Fair is organized during May and June.

### Festivities:

- ▶ Feast of the Holy Cross (May).
- ▶ Foundation of Tequisquiapan (June).
- ▶ Feast of Santa María de la Asunción (August).
- ▶ Air Festivity, balloon festival of cantolla (December).

### Attractions:

- ▶ Geographic center of the country.
- ▶ La Pila Recreational Park.
- ▶ Miguel Hidalgo Square.
- ▶ Temple of Santa María de la Asunción.



## San Joaquín

Named a Magic Town in 2015, it was formed in 1724 and is recognized for its mining past and as the home of the Huapango. Its natural beauty stands out, full of pine, cedar, oak, holm oak and ash trees.

### Festividades:

- ▶ National Huapango Dance Contest (April).
- ▶ San Joaquín Patron Saint's Day (July).
- ▶ Largest picnic in Latin America (August).

### Attractions:

- ▶ Las Maravillas waterfalls.
- ▶ Los Herrera Cave.
- ▶ Parish Church.
- ▶ Campo Alegre National Park.
- ▶ Archeological zones of Ranas and Toluquillas.





## Amealco de Bonfil

Located in the south of the state, it was designated Magic Town in 2018. In the same year, the Lele doll was named national heritage, a handcraft originating in Santiago Mexquititlán, a town located in Amealco de Bonfil; it is currently recognized worldwide.

### Festivities:

- ▶ Fair in honor of the foundation of the municipality (April).
- ▶ National Handmade Doll Fair (November).

### Attractions:

- ▶ Ancient Temple of San Ildefonso Tultepec.
- ▶ La Piedad waterfall.
- ▶ Ex-hacienda La Muralla.
- ▶ Laguna de Servín .
- ▶ Museum of the Handmade Doll.



## Pinal de Amoles

Founded in 1606 with an important mining past, it was declared a Magic Town in June 2023. It has unique landscapes and nature, as well as picturesque houses with red roofs.

### Festivities:

- ▶ National Huapango Dance Contest (March).
- ▶ Annual fair (March).

### Attractions:

- ▶ El Chuveje waterfall.
- ▶ Los Riscos Cave.
- ▶ Ex-convent of Bucareli.
- ▶ Cuatro Palos viewpoint.
- ▶ Gate of Heaven.





### Art, Cheese and Wine Route

In recent years, Mexico has positioned itself as a tourist reference at the international level, with the 6 wine routes located in Aguascalientes, Baja California, Coahuila, Guanajuato, Querétaro and Zacatecas gaining momentum.

In Querétaro, visitors can get a taste of local flavors by combining the products of the vineyards with the exquisite gastronomy of the Art, Cheese and Wine Route, one of the most renowned wine tourism routes in the country, which is active all year round.

The route shows the beauty of the historical and cultural heritage of the municipalities that comprise it, with the production of numerous varieties of artisanal cheeses, as well as the production of red, white and, above all, sparkling wines, of which Querétaro is the main national producer. During the grape harvest season, between June and September, thousands of people are attracted every year.

### Art, Cheese and Wine Route

- Cadereyta zone
- El Marqués zone
- Tequisquiapan zone

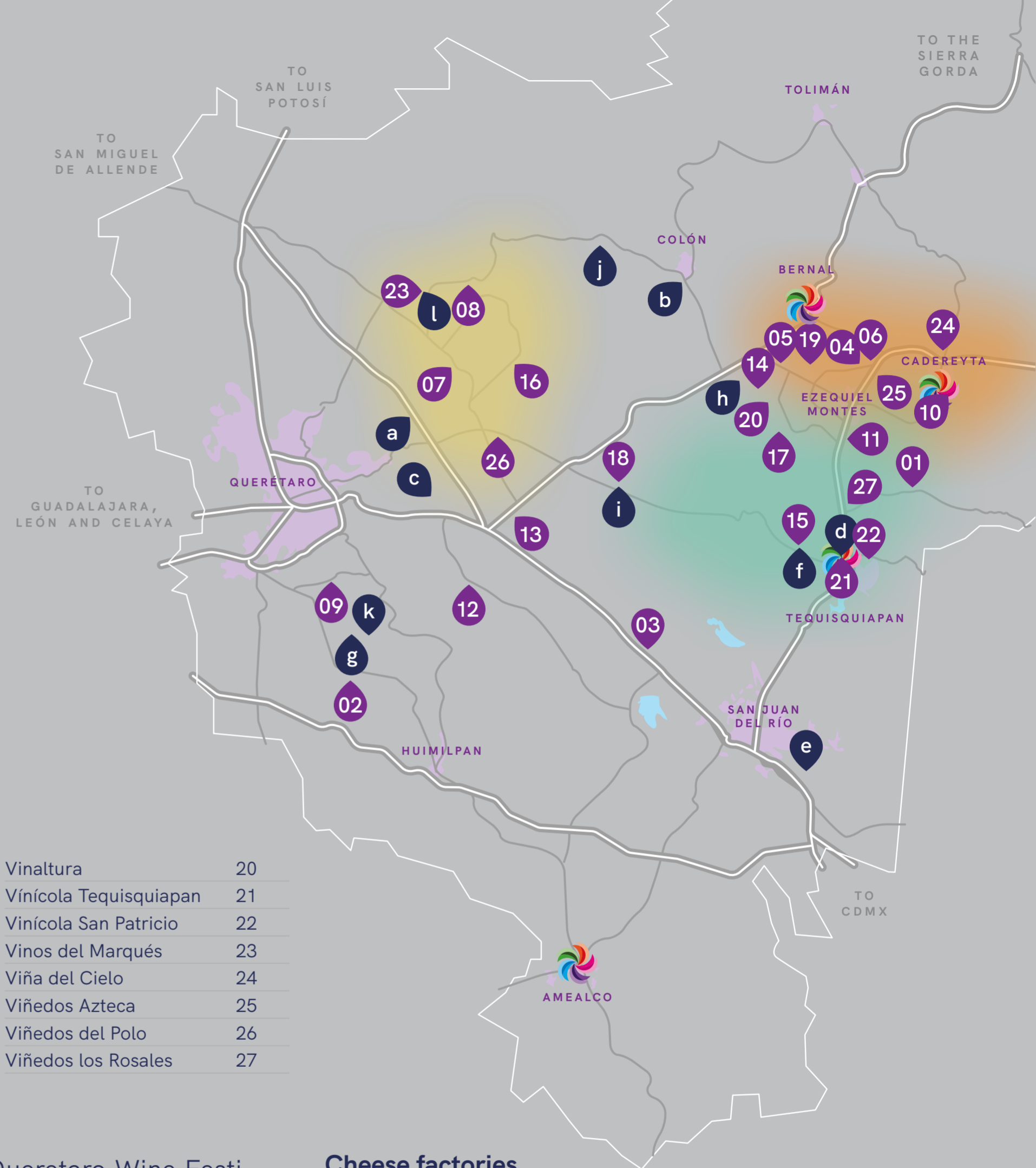
#### Vineyards

Bodegas Vaivén	01		
Casa Vegil	02		
Cava 57	03		
De Cote	04		
Donato	05		
Finca Sala Vivé by			
Freixenet México	06		
Hacienda Amazcala	07		
Hacienda Atongo	08		
Hacienda La Solariega	09		
Hacienda Tovaes	10		
La Redonda	11		
La Terquedad	12		
María y Bernardo	13		
Paso de Serra	14		
Norte B	15		
Puerta del Lobo	16		
San Juanito Vitivinícola	17		
Tierra de Alonso	18		
Tierra de Peña	19		
Vinaltura	20		
Vínicola Tequisquiapan	21		
Vínicola San Patricio	22		
Vinos del Marqués	23		
Viña del Cielo	24		
Viñedos Azteca	25		
Viñedos del Polo	26		
Viñedos los Rosales	27		

In October 2023, the 3<sup>rd</sup> Queretaro Wine Festival was held, an event that contributes to position the state as a generator of knowledge, culture and economic and tourist dynamization around wine.

#### Cheese factories

Chèvre	a	Pradales	g
Flor de Alfalfa	b	Quesos del Rebaño	h
Granja La Serpentina	c	Quesos Vai	i
La Biquette	d	Rancho La Hondonada	j
La Gastoreña	e	Rancho San Josemaría	k
Neolé Cava Bocanegra	f	Rancho Santa Marina	l





### 7.1.2

## Hotel sector

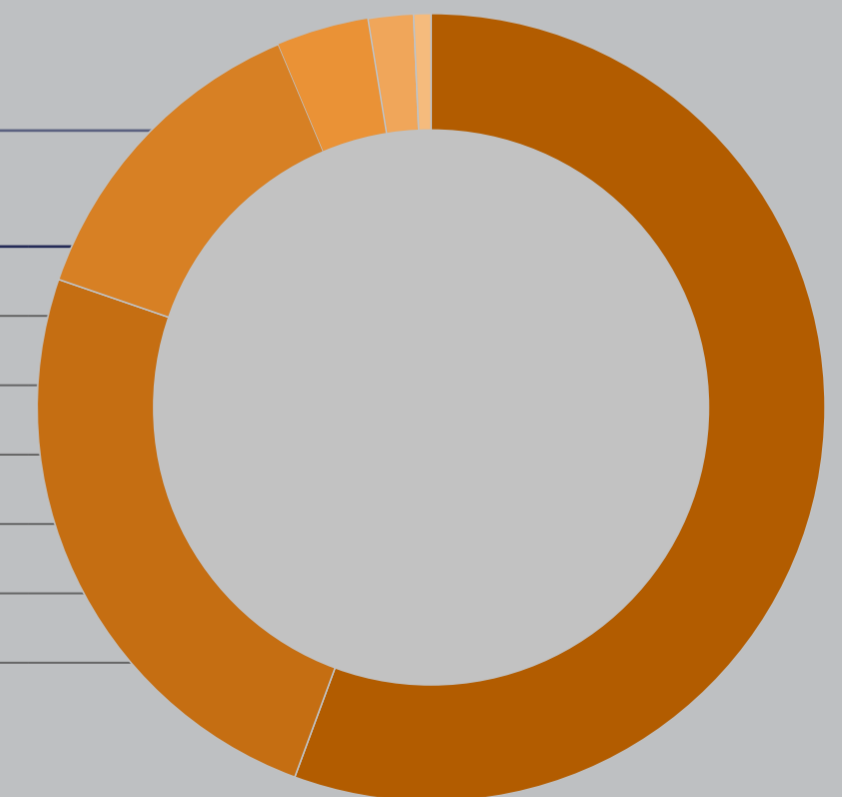
### Hotel supply

During 2023, 1,404 lodging establishments were registered in 15 of the 18 municipalities of the state, 55.6% of which were apartments and furnished houses with hotel services.

Distribution of lodging establishments by type of lodging in Querétaro (2023)

TYPE OF ESTABLISHMENT	NUMBER	DISTRIBUTION
Furnished apartments and houses with hotel service	781	55.6%
Hotels	346	24.6%
Cottages, villas and similar	188	13.4%
Recreational campsites and lodges	53	3.8%
Motels	26	1.9%
Pensions and guest houses	10	0.7%

Source: Prepared by the authors with data from the municipal Tourism Departments, 2024.  
Note: This list does not include the municipalities of Cadereyta de Montes, Querétaro and El Marqués, because the municipalities did not provide updated information.

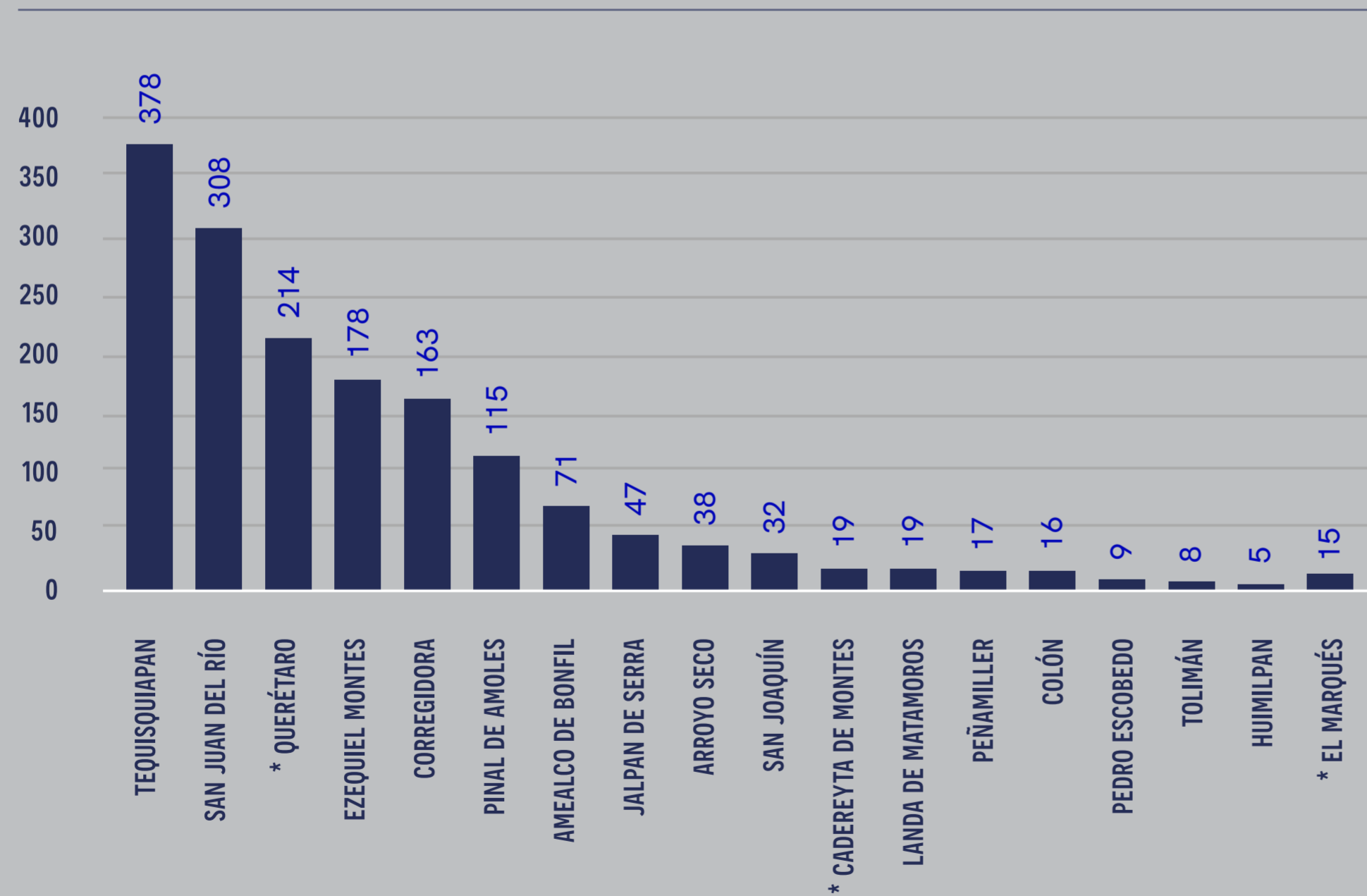






Tequisquiapan accounted for 22.9% of the total number of lodging establishments, a situation that reflects its tourist attractiveness, followed by the municipality of San Juan del Río, with 18.6%.

Lodging establishments by municipality in Querétaro (2023)



Source: Prepared by the authors with data from the municipal Tourism Departments, 2024.  
\* Correspond to 2022, because the municipalities did not provide updated information.





### 7.1.3

## Tourist services

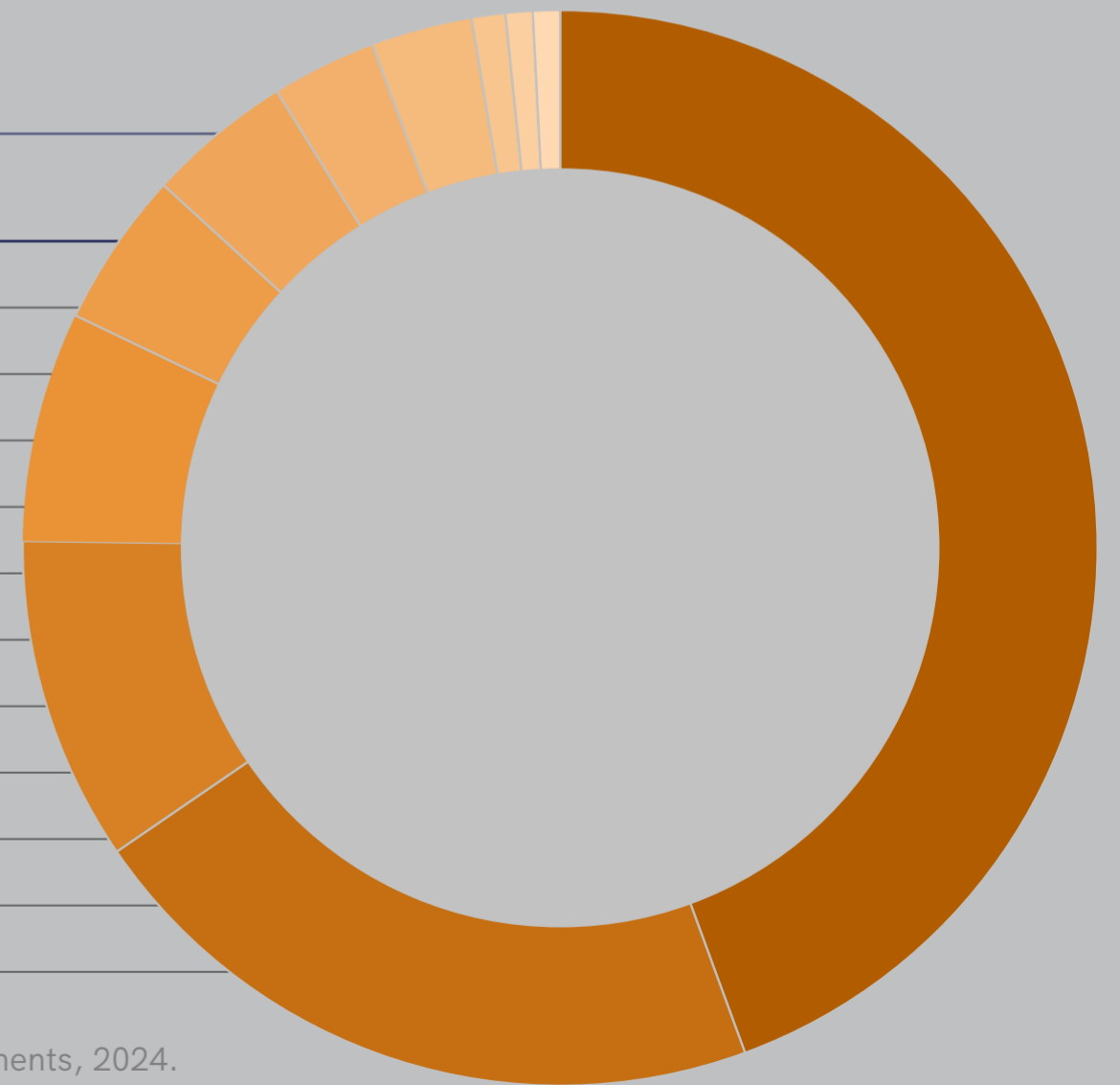
### Offer of tourist services

The sector's activities are complemented by the services provided by food and beverage establishments, travel agencies, tour operators, leasing companies, and tour guide companies.

In 2023, 811 tourism service establishments were reported in 15 of the 18 municipalities of the state, with handicraft stores being the most predominant.

Distribution of tourism service establishments in Querétaro (2023)

TYPE OF ESTABLISHMENT	NUMBER	DISTRIBUTION
Crafts stores	237	44.4%
Travel agencies	119	21%
Tourist guides	311	9.8%
Tourist transportation	64	6.9%
Car rentals	4	4.7%
Other recreational services	16	4.4%
Aquatic parks	18	3.2%
Tourist assistance modules	24	3%
Tourism education centers	9	1%
Convention centers	6	0.8%
Golf courses	3	0.8%

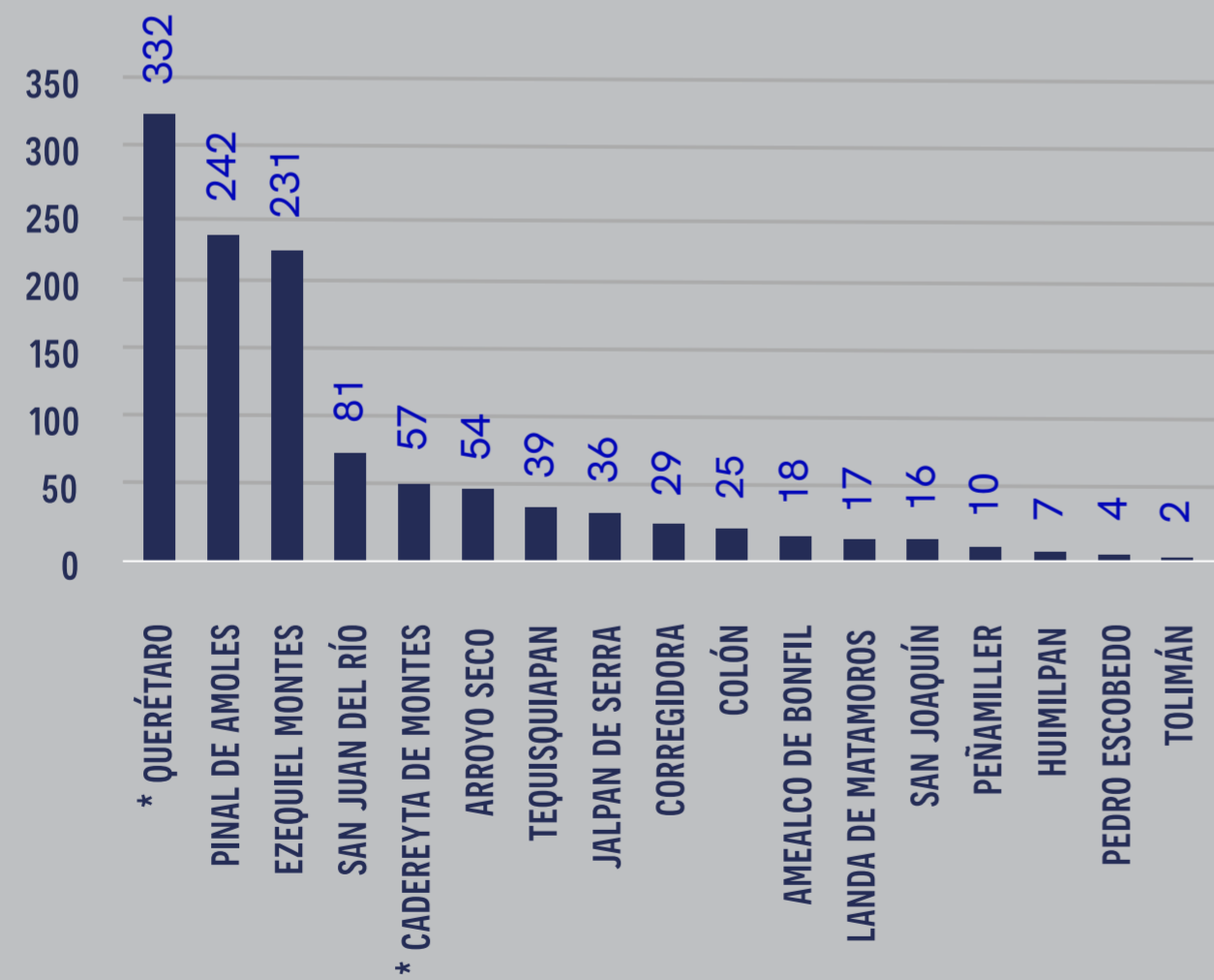


Source: Prepared by the authors with data from the municipal Tourism Departments, 2024. Note: This list does not include the municipalities of Cadereyta de Montes, Querétaro and El Marqués, because the municipalities did not provide updated information.



Querétaro was the municipality with the highest number of tourism service establishments, with 33.7% of the total, followed by Pinal de Amoles with 20.2%.

Distribution of tourism service establishments by municipality in Querétaro (2023)



Source: Prepared by the authors with data from the municipal Tourism Departments, 2024. \* Correspond to 2022, because the municipalities did not provide updated information.





## 7.2

# Culture

According to the United Nations Educational, Scientific and Cultural Organization (UNESCO), culture is defined as the various spiritual, material, intellectual and emotional features that characterize a society. Through it, the population is enriched, helping to build inclusive, innovative and resilient communities.

The phenomena experienced in recent years, such as pandemics, climate change, technological advances and conflicts, are factors that weaken the preservation of culture. Hence the importance of safeguarding historic sites, preserving diversity through living heritage, supporting artistic innovation, among other elements.





### 7.2.1

## Cultural infrastructure

Querétaro is a state that stands out for its cultural offer and promotion, with a multitude of spaces dedicated to the preservation and development of its activities, guaranteeing effective access to the population.

According to the Cultural Information System of the Federal Ministry of Culture, the state's cultural venues include museums, theaters, bookstores, libraries, cultural centers, galleries and auditoriums, which together total 430 venues.

### Cultural infrastructure in Querétaro (2023)

INFRASTRUCTURE	NUMBER OF FACILITIES	NATIONWIDE RANK
Museums	55	12
Theaters	23	9
Bookstores	32	12
Galleries	38	7
Auditoriums	37	8

Source: Prepared by the authors with information from the Ministry of Culture (Cultural Information System), 2024.

Note: The position at the national rank refers to Querétaro's position among the entities with the highest number of facilities in each category.



## Museums

UNESCO recognizes their role in the development of the local and regional creative economy, as well as the importance of their presence in society as open spaces for the exchange of opinions and citizen participation.

There are 1,638 museums registered nationwide, Querétaro is home to 3.4% of them, that is, 55 museums, with the municipality of Querétaro having the largest number.

### Municipality-owned museums in Querétaro (2023)

MUNICIPALTIES	CENSUS
Amealco	Museum of the Handmade Doll in Amealco
Colón	Sarape Museum Community Museum of Colón
Corregidora	History Museum Anbanica Community Museum "Severiano Hernández González" Rubén González Museum "Art, Tradition and Faith"
Ezequiel Montes	Mask Museum Ánimas Museum National Cinema Museum "Rosalío Solano"
Huimilpan	Community Museum Huimilpan in San Pedro
Jalpan de Serra	Community Museum Pame Xi'oi Museum of Our Lady of the Sea of Herrera, Saucillo
Landa de Matamoros	Community Museum of Treasures of Our History in Landa de Matamoros Community Museum Chronicle and Agricultural Art of the Sierra Gorda in Agua Zarca
Pinal de Amoles	Lucio Balderas Marquez Community Museum in Tilaco Community Museum Ex-convent of Bucareli Royal Community Museum and Mines of Las Escanelas

MUNICIPALTIES	CENSUS
Querétaro	Querétaro Railroad Museum Cerro de las Campanas Museum
San Joaquín	Huapango Museum of San Joaquín Mineral Community Museum of San Joaquín
San Juan del Río	Santa Veracruz Pantheon Museum
Tolimán	Museum of the Hñöhño Culture of San Miguel Tolimán

Source: Prepared by the Ministry of Culture (Cultural Information System), 2024.  
Note: The municipalities of Arroyo Seco, Cadereyta de Montes, Tequisquiapan, Peñamiller, Pedro Escobedo and El Marqués do not have municipality-owned museums.

### State-owned museums in Querétaro (2023)

MUNICIPALTIES	CENSUS
Jalpan de Serra	Historical Museum of Sierra Gorda
Pinal de Amoles	Community Museum of Pinal de Amoles "General Tomás Mejía" Art Museum Contemporary Art Museum
Querétaro	City Museum Restoration Museum Conspirators Museum

Source: Prepared by the Ministry of Culture (Own sources), 2024.



### Theaters

There are 732 theaters in the country, 23 of which are located in the state. The municipality of Querétaro accounts for 87% of them, while Corregidora, San Juan del Río and Tequisquiapan make up the remaining 13% with one site each.

### Bookstores

There are 1,562 bookstores in Mexico, 32 of them in the state. The municipality of Querétaro has 30, while Jalpan de Serra and San Juan del Río have one each.

### Libraries

Mexico has 9,263 libraries; at the state level, 84 are registered, of which 67 belong to the State Network of Public Libraries. They are distributed throughout the municipalities as follows: Querétaro with 25; Pedro Escobedo with 11; San Juan del Río with 8; Tequisquiapan and San Joaquín with 6 each; Amealco with 5; Cadereyta de Montes with 4; El Marqués and Landa de Matamoros with 3 each; Colón, Corregidora, Ezequiel Montes, Jalpan de Serra and Tolimán with 2 each; and Arroyo Seco, Huimilpan, Peñamiller and Pinal de Amoles with one each.



### Galleries

There are 992 galleries nationwide. There are 38 galleries in the state, 30 of which are in the municipality of Querétaro. The remaining galleries are located at: San Juan del Río (2); Tequisquiapan (2); Corregidora (1); El Marqués (1); Cadereyta (1) and Amealco de Bonfil (1).

### Auditoriums

There are 902 auditoriums in the country; the state has 37 public or private auditoriums located in the municipalities of Querétaro (31); Jalpan de Serra (2); Cadereyta de Montes (1); Corregidora (1); El Marqués (1); San Juan del Río (1).





## 7.2.2

### Cultural heritage

UNESCO recognizes it as an engine for the development of contemporary societies, contributing to the continuous revaluation of customs, traditions and identities, transmitting experiences, skills and knowledge between generations and inspiring creativity and innovation that create future cultural products.

Querétaro is rich in public spaces, archaeological sites, monuments and an endless number of invaluable elements that enrich the lives of citizens and encourage innovation through personal contact with these spaces.





### Cultural heritage of the state of Querétaro registered with the National Council for Culture and the Arts (2023)

MUNICIPALITY	WORLD HERITAGE	UNESCO DECLARATORY STATEMENTS	ARCHEOLOGICAL ZONES	INAH HISTORICAL MONUMENTS	RAILROAD HERITAGE
Amealco de Bonfil	-	1	-	262	-
Pinal de Amoles	-	-	-	52	-
Arroyo Seco	1	-	-	46	-
Cadereyta de Montes	-	1	1	255	-
Colón	-	1	-	80	-
Corregidora	-	-	1	136	-
Ezequiel Montes	-	1	-	117	-
Huimilpan	-	-	-	46	-
Jalpan de Serra	1	-	1	79	-
Landa de Matamoros	1	-	-	39	-
El Marqués	1	-	-	119	-
Pedro Escobedo	-	-	-	73	-
Peñamiller	-	-	-	61	-
Querétaro	2	-	-	2,198	3
San Joaquín	-	-	1	55	-
San Juan del Río	1	-	-	673	-
Tequisquiapan	-	-	-	123	2
Tolimán	-	1	-	376	-
<b>Total</b>	<b>7</b>	<b>5</b>	<b>4</b>	<b>4,790</b>	<b>5</b>

Source: Prepared by the Ministry of Culture, 2024.





## World heritage

The UNESCO list registers those monuments and sites that, because of their great natural and cultural wealth, are considered to be the property of humanity. Only countries that have signed the World Heritage Convention may submit nominations for properties on their territories to be considered for inclusion in the inventory.

In 2023, the World Heritage Committee 2023 was held, in which 42 sites were added to the list, reaching a total of 1,199 sites, of which 993 are cultural, 227 natural and 39 mixed; these sites become a symbol of the people that host them, in addition to transmitting history and cultural identity to future generations.

Mexico contributes 35 sites to the list, of which 6 are natural, 27 are cultural and 2 are mixed. Querétaro comprises three sites of the list:

- ▶ **Historic Monuments Zone of Querétaro** (recognized in 1996 as a World Heritage Site). It stands out for the particularity of having preserved the geometric plan of the streets of the Spanish conquistadors, next to the winding alleys of the Indian neighborhoods. It has numerous ornate baroque civil and religious monuments.
- ▶ **Franciscan Missions of the Sierra Gorda de Querétaro** (2003). They comprise five missions built in the 18th century during the evangelization phase in the interior of Mexico. These are 1) Santiago de Jalpan; 2) Nuestra Señora de la Luz de Tancoyol; 3) Santa María del Agua de Landa; 4) San Francisco del Valle de Tilaco and 5) San Miguel Concá.
- ▶ **Tierra Adentro Royal Road** (2010). Also known by the name of "Camino de la Plata", it comprises five sites already inscribed on the World Heritage List. It was used between the XVI and XIX centuries as a trade route for 300 years to transport silver extracted from the mines of Zacatecas, Guanajuato and San Luis Potosí, as well as mercury imported from Europe.



## Archeological zones

In what is now Mexican territory, a great diversity of cultures developed and left material evidence of their existence in sites that are part of the national archaeological heritage.

In Querétaro there are four archeological sites registered in the Cultural Information System of the Federal Ministry of Culture: El Cerrito, in the municipality of Corregidora; Ranas, in San Joaquín; Tancama, in Jalpan de Serra; and Toluquilla, in Cadereyta de Montes.

El Cerrito, also known as the Pyramid of El Pueblito, is located 7 km from Querétaro. Its

name comes from the resemblance that its base and main structure maintains with a naturally formed protuberance, similar to a small hill. Archaeological evidence suggests that this site was influenced by different cultures over time, among them: Toltecs, Chichimecs, Purepechas and Otomis.

Ranas is located 154 km northwest of the city of Querétaro. This archaeological zone, along with Toluquilla, are the most important exponents of the cultural expression of the highlands, extended in the southern region of the Sierra

Gorda. It is a site associated with the exploitation of the largest mining wealth of the mountain complex.

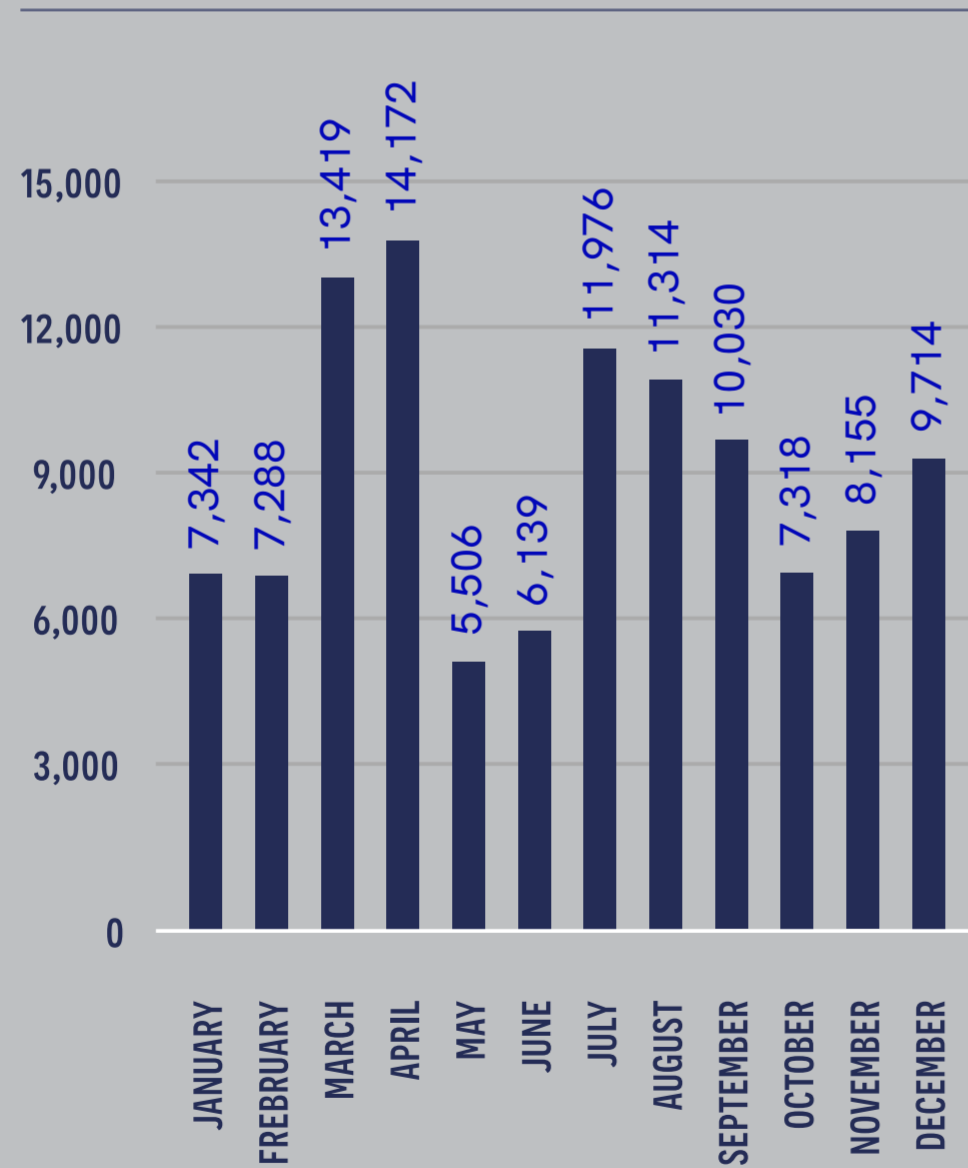
Tancama is located in the heart of the Sierra Gorda, a few minutes from the municipal capital of Jalpan de Serra and was a settlement of the Huastec culture. Its name means hill of fire in the Huasteca language. The site features 42 structures of different sizes and shapes and an 18-meter long ball game. It is made up of three large squares at different levels called: El Mirador, Santiago and La Promesa.

Toluquilla is located 110 km northeast of San Juan del Río. It is a group of 120 constructions built on a plateau whose surface was modified to enable the construction areas. Its name means "humpbacked hill" or "small humpback". Its state of preservation is exceptional, you can see staircases, alleys, streets, doorways and walls with more than 2m high. In this site lived the priests and people related to the cult who specialized in obtaining mineral pigments, such as cinnabar or garnet.



During 2023, 112,373 people visited archaeological sites in the state. April was the month with the highest number of visitors, followed by March and July.

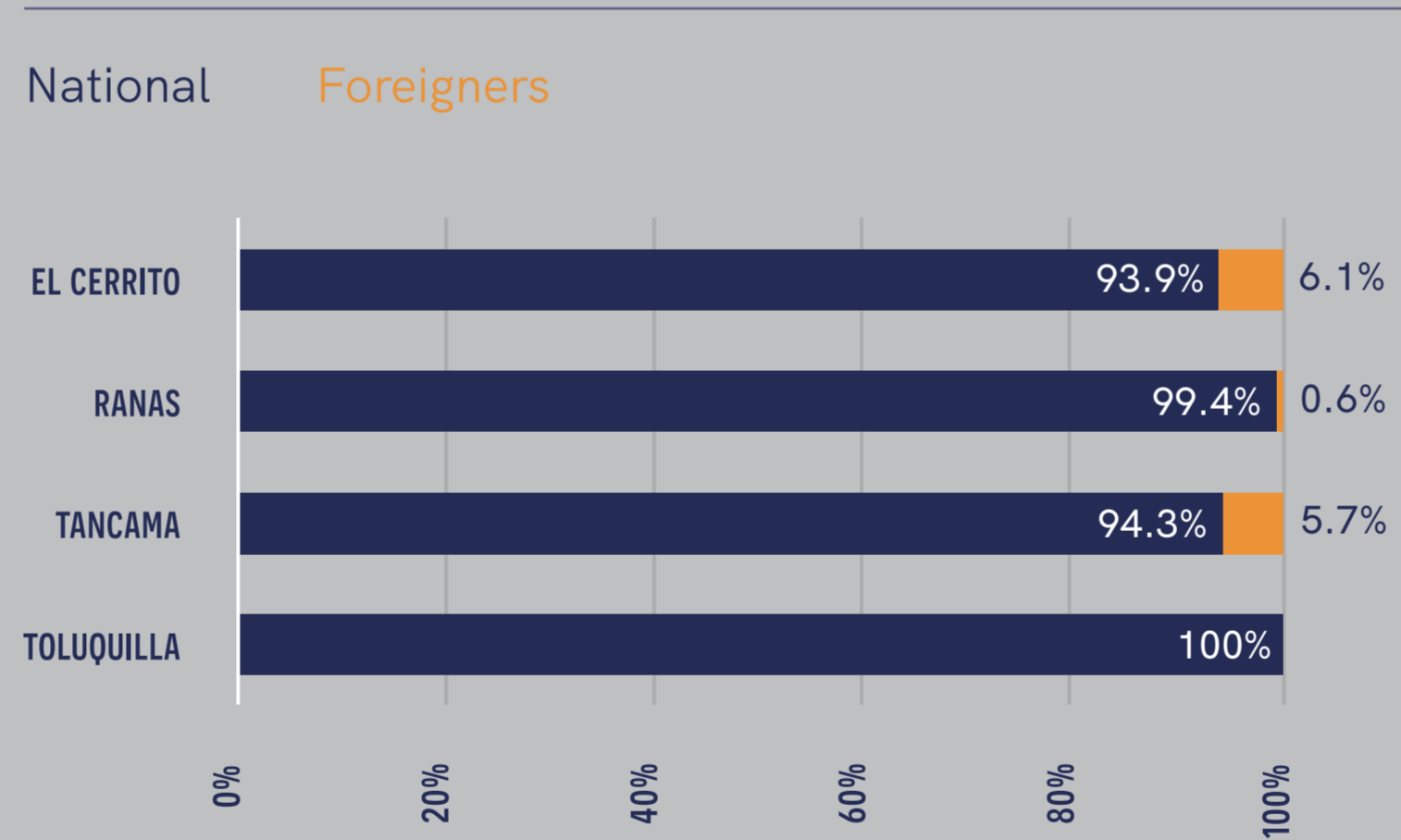
Visitors to archaeological sites per month in Querétaro (2023)



Source: Prepared by the authors with data from the Ministry of Culture (Statistics of the National Institute of Anthropology and History), 2024.

The El Cerrito archaeological zone registered a total of 79,037 visitors, Ranas 22,867, Tancama 6,826 and Toluquillas 3,643. Of the total number of visitors, 95.3% were nationals and 4.7% were foreigners.

Distribution of domestic and foreign visitors by archaeological zone in Querétaro (2023)



Source: Prepared by the authors with data from the Ministry of Culture (Statistics of the National Institute of Anthropology and History), 2024.



## Historical monuments

These are the properties linked to the history of the nation, from the establishment of the Hispanic culture in the country, built from the XVI to the XIX century. A group of various historic monuments may be declared a historic monument zone.

The National Institute of Anthropology and History (INAH), through the National Coordination of Historic Monuments, is in charge of the surveillance, conservation and restoration of the monuments.

The collection is made up of temples, parishes, cloisters, fountains and other representative buildings of the state. Some of these are the Aqueduct, the Alameda Hidalgo, the Chapel of Maximiliano de Habsburgo, the House of La Corregidora, the House of the Marquise, the Guerrero Garden, the Zenea Garden, the Legislative Palace, the Plaza de Armas, the Theater of the Republic and the Temple de San Francisco.

Querétaro has 4,724 historic monuments, 45.2% of which are concentrated in the municipality of Querétaro.

### Historical monuments in Querétaro (2023)

REGION	MUNICIPALITY	HISTORICAL MONUMENTS		
Querétaro	Querétaro	2,137	2,137	
	Amealco	262		
	Corregidora	131		
	El Marqués	119		
	Valleys and south			1,427
	Huimilpan	46		
	Pedro Escobedo	73		
	San Juan del Río	673		
	Tequisquiapan	123		
	Sierra Gorda and Semidesert	Arroyo Seco		46
Cadereyta		254		
Colón		80		
Ezequiel Montes		118		
Jalpan de Serra		79		
Landa de Matamoros		39		
Peñamiller		61		
Pinal de Amoles		52		
San Joaquín		55		
Tolimán		376		

Source: Prepared by the authors with data from the National Institute of Anthropology and History (Coordination of Historical Monuments Querétaro), 2024.



## Photo libraries

Photography has great testimonial and artistic importance, it represents a cultural heritage that should be protected, studied and disseminated, since it allows us to know other places and perspectives of the daily life of yesteryear.

There are two photo libraries located in the Historic Center of the capital city:

- ▶ Photographic Archive of the Regional Museum of Querétaro. Collection from the late nineteenth century to the present time, which shows the activities carried out by INAH Querétaro, with 18,000 copies.
- ▶ Historical Archive of the State of Querétaro. Collection that shows the history of the state between 1800 and 1900, it has 1,586 copies.

## Railroad heritage

Of the 504 railway stations registered nationwide, 5 are located in the state of Querétaro, all of them registered with the INAH::



1. **Bernal station.** Built on the Mexico-Nuevo Laredo Line of the former Mexican National Railroad.
2. **Hercules station.** Established on the trunk line from Mexico to Nuevo Laredo, Tamaulipas. Its construction was carried out by Mexican National Construction Company.
3. **Noria station.** Erected on the trunk line of the old Mexican National Railroad.
4. **Querétaro station.** It was part of both the old Central Railroad and the Mexican National Railroad and once served the route from Mexico to Querétaro. It was opened in 1903.
5. **San Nicolás station.** It covered the route from Mexico to Nuevo Laredo, was a passenger and freight station, with telegraph, offices and tracks.



## Intangible cultural heritage

UNESCO argues that today's cultural diversity is affected by increasing globalization. This is why it is so important to preserve the wealth of knowledge and techniques that have been passed down from generation to generation.

This type of heritage is manifested in oral traditions, performing arts, social practices,

rituals, festive events, knowledge and practices, all related to nature, the universe and knowledge and techniques linked to traditional craftsmanship.

There are currently 730 elements on the Representative List of the Intangible Cultural Heritage of Humanity, of which 55 joined the list

during 2023. Mexico has 12 registered cultural expressions, representing 1.6% of the world total. In 2023, an expression was added to the list of Intangible Cultural Heritage for Mexico, which was called "Bolero: identity, emotion and poetry made song".

Of the 13 Mexican cultural expressions, one has been part of the cultural heritage of the state of Querétaro since 2009 and is called "Places of memory and living traditions of the Otomí-Chichimeca peoples of Tolimán. La Peña de Bernal, guardian of a sacred territory".

This is because the Otomí-Chichimeca people have preserved a set of traditions that bear witness to their exceptional relationship with the topography and the environment. Throughout the year, various community festivities take place, which constitute a whole calendar of celebrations of rites centered on water and which exalt the resilience of the people.





## 7.2.3

## Cultural identity

It is manifested through the sense of belonging to a social group with which cultural traits such as customs, values and beliefs are shared.

Querétaro is an entity of fascinating, colorful and diverse cultural richness, as evidenced by its crafts, music, gastronomy, parties and unparalleled traditional festivities.





## Crafts

The Queretaro House of Handicrafts (CQA, by its acronym in Spanish), through different actions, seeks to preserve and disseminate the culture of Queretaro, as well as to help artisans improve their quality of life through the commercialization of their products. To this end, it is responsible for designing, administering and promoting programs aimed at strengthening and disseminating handicraft activities and promoting research and the adoption of new techniques and designs related to handicraft production.

For 20 years, the CQA has promoted artisans, making Queretaro's handicrafts a national and international reference.



## Marketing of handicraft products

The CQA has three points of sale that promote and commercialize Querétaro's handicrafts, which are in Tequisquiapan, the International Airport of Querétaro and the Historic Center of Querétaro, the latter being the main point of sale.

In 2023, the branch located at the Querétaro International Airport was remodeled in order to increase sales for artisans.

In addition, the Historic Center branch was expanded with 3 rooms dedicated to:

- ▶ **Hall of Tourist-Craft Experiences.** It shows the handicraft richness of the state of Querétaro, through the exhibition of traditional pieces and the presentation, by means of a map that shows which are the main handicraft municipalities and their techniques.



- ▶ **Textile sales room.** Home decor pieces such as cushions, rugs, tablecloths, and handmade clothing are exhibited. Agro-industrial and personal hygiene products, the result of productive projects developed in collaboration with the state DIF (by its Spanish acronym) and the state Secretariat of Social Development.

- ▶ **Direct sales room for handicrafts and temporary exhibitions.**

In 2023, reported sales amounted to \$7,604,000, 90.1% higher than in the previous year. This is due to the remodeling of the point-of-sale facilities and the change of image.

## Social programs

The production of handicrafts in Querétaro, in addition to preserving a traditional activity, is a source of income and social development for the communities.

Through the Social Development Program for the Promotion of the Social Sector of the Economy in the state of Querétaro, we seek to improve the lives of artisans by comprehensively addressing production processes through training, equipment, raw materials, payment of labor and the purchase of handicrafts, as well as support for participation in events, fairs and exhibitions.

In order to meet the program’s objectives, a state investment of \$1,750,000 was made in 2023, benefiting a total of 320 artisans.

## Contests

In 2023, the CQA held 4 artisan contests in collaboration with the municipalities of Amealco de Bonfil, Cadereyta de Montes and Pedro Escobedo, achieving a participation of 495 artisans and a total prize purse of \$1,549,000.



### Artisanal Contests of Queretaro House of Handicrafts (2023)

NAME OF THE CONTEST	PARTICIPANTS	AWARDS PRESENTED	TOTAL PRIZE POOL
XXXVI Quarry and Textile Carving Contest 2023	85	21	\$273,000
2023 Quarry Contest at the Grain and Quarry Fair	52	20	\$212,000
9 <sup>th</sup> State Handicrafts Award Competition 2023 <sup>1</sup>	204	33	\$690,000
11 <sup>th</sup> National Handmade Dolls Contest 2023 <sup>1</sup>	154	19	\$374,000

Source: Prepared by the Queretaro House of Handicrafts (CQA), 2024.

Note: <sup>1</sup> It was carried out in collaboration with the National Fund for the Promotion of Handicrafts (FONART by its Spanish acronym).



### Training

In order to strengthen the artisans’ skills and address areas of opportunity in the production process, the CQA organized various training activities.

During 2023, 50 consultancies were carried out, benefiting 252 artisans. These training sessions were attended by artisans from 6 of the 18 municipalities; Cadereyta de Montes had the largest number, accounting for 29% of the total, followed by Amealco with 27% and Tolimán with 18.3%.

### Training for artisans in Querétaro (2023)

NAME OF THE COURSE	NUMBER OF ARTISANS	MUNICIPALITY
Product costing consulting	60	Amealco de Bonfil
	46	Cadereyta de Montes
	8	Amealco de Bonfil
Introductory social media consulting	7	Colón
	20	Pedro Escobedo
	15	Tequisquiapan
	46	Tolimán
	20	Cadereyta de Montes
Design innovation consultancy for pottery artisans	7	Cadereyta de Montes
Dressmaking consulting	6	Colón
Advice on the preservation of wood carving techniques in disuse	2	Pedro Escobedo
Advice on the formalization of handicraft activities for wicker artisan	15	Tequisquiapan

Source: Prepared by the Queretaro House of Handicrafts (CQA by its Spanish acronym), 2024.



## Fairs, exhibitions and special events

In order to promote and market the works of artisans, the CQA participates in national and international fairs and exhibitions, where it invites artisans of the main techniques to present their products. During 2023, the following stand out:

### Fairs and exhibitions

- ▶ **Tianguis Turístico 2023 in the CDMX; Punto México in the CDMX; and the Life and Death Festival in Xcaret, generating an economic benefit of more than \$1,000,000 for invited artisans.**
- ▶ **Grand Rapids Michigan Mexican Fiesta.**
- ▶ **International Tianguis of Magic Towns in Los Angeles.**



### Special events

- ▶ **Together with the State DIF System, 18 textile workshops participated in the fashion show at the Universidad Anáhuac de Querétaro, benefiting more than 50 artisans. The funds raised from the event were used to purchase raw materials for the artisans.**
- ▶ **Querétaro was selected as a guest state at Design Week Mexico, recognizing its outstanding role in the field of design to boost Mexico's creative industry. The guest country on this occasion was France, which strengthened the creative ties between the two countries.**
- ▶ **In August, the Residency Program was successfully carried out in 13 workshops in the municipalities of Amealco, Pedro Escobedo, Cadereyta, Ezequiel Montes, Tequisquiapan, Tolimán, Colón and Querétaro, which promoted collaborative work between Querétaro artisans, Mexican and French designers, resulting in a collection of pieces of traditional craftsmanship and innovative contemporary design that were part of the exhibition "Vision and Tradition" held at the National Museum of Anthropology and History in October.**



## Artisanal production

In 2023, through the Program to Promote Artisanal Production, 53 artisans directly obtained economic resources totaling \$200,000 from the National Fund for the Promotion of Handicrafts (FONART by its Spanish acronym) to strengthen the acquisition of fixed assets or supplies for artisanal production.

## Census and Artisanal Registry

Following up on the census conducted in 2022, during 2023, a new census, registration and artisanal credentialing survey was carried out, in which 217 new artisans were registered, giving a total of 3,825 artisans registered with the CQA.



## Music

UNESCO considers music to be a language accessible to all, a means of artistic expression capable of conveying a universal message. Querétaro has a great variety of rhythms and musical traditions characteristic of its different regions.

To the south of the municipality of Amealco de Bonfil and in the Central Semidesert, the multiple melodic expressions have their origin in the Otomí settlements. Native melodies are commonly played by trios composed of two flutes or two violins and a drum and are invariably present

in community festivities, almost always linked to the predominant religion. In the Otomí area of Tolimán there is a variant called viñuetes, which is played with a big drum called tambora, a smaller one called tamborcillo and violin.

In the Sierra Gorda and the Central Semidesert the predominant cultural expression is the huapango. The rhythm of the instruments, the colorful costumes and the greatness of the customs that characterize it, make this, one of the most beautiful traditions of the country and Mexican culture. The music and the zapateado dance combine the different identities and customs that coexist in the Huasteca region.

In the city of Querétaro, the pre-Hispanic cultural expression of the Danza de los Concheros is particularly noteworthy. Its performers use instruments made from the shell of an armadillo, the huéhuetl and the teponaxtle, as well as rattles and accessories based on large seeds that are called friar's bones; they emit a sound effect similar to a rattle.





## Gastronomy

Mexican culinary art has been considered Intangible Heritage of Humanity by UNESCO since 2010. It includes agricultural activities, ancient know-how and culinary techniques, with corn, beans and chili as basic elements.

Querétaro's gastronomy stands out with a large number of dishes that make reference to different periods of history. The state has three zones with well-defined traditional cuisine: the Bajío Queretano, the Semidesert and the Sierra Gorda.

In the Bajío region, recipes are spread throughout its towns and municipalities, with the city of Querétaro standing out, where its cuisine dates back to the time of the viceroyalty, being a mixture of Spanish and indigenous cuisine, including ingredients such as chiles and tomatoes, even olives and capers. Today, it has become



a cosmopolitan city, with haute cuisine gaining importance.

The Semidesert is characterized by the aridity of its soil, so its dishes are distinguished by local flora and fauna, such as nopales, chilies, prickly pear cactus, guamiche, among others. Pulque is also an element present in the gastronomic offer.

Finally, the Sierra Gorda offers a mix of native and mestizo recipes, flavors and traditions. In the

area you can taste dried meats, cheeses, jerky, acamayás, chiles, among others.

The state's gastronomy has boosted the wine culture and with it, Querétaro's vineyards have developed and strengthened, favoring the establishment of companies dedicated to the production of high quality artisanal culinary products.



## Traditional holidays and festivities

Querétaro stands out for being an entity with a broad cultural heritage, accentuating diverse festivities where customs and beliefs that have remained throughout the years stand out.

Within the 18 municipalities of the state, traditional festivities and celebrations are held that distinguish each region and even each locality. Some of the most representative are:

- ▶ **Procession of Silence (Good Friday):** The tour begins in the atrium of the Convent of the Santa Cruz de los Milagros and continues through the main streets of the historic center, in which mourning, respect and repentance are manifested.
- ▶ **Foundation Day (July 25):** It celebrates the establishment of the city in 1531, as well as the apostle Santiago, who was in charge of uniting the Spaniards and indigenous people in the lands of Queretaro.
- ▶ **Feast of the Holy Cross (September 12-16):** It begins with a large gathering of concheros dancing Chichimeca rites, climbing the Cerro de Sangremal and reaching the Templo de la Cruz (Temple of the Cross).
- ▶ **Day of the Dead (November 1 and 2):** It is an emblematic celebration, which over the years has become a party, in the main gardens are presented the traditional altars, accompanied by cempasúchil flowers, paper cut and candles.



#### 7.2.4

### Cultural and artistic offerings

In the history of Mexico, Querétaro has been a fundamental actor; it is a state that promotes culture through multiple options for artis-

tic development, the appreciation of fine arts, recreation and family life.

Its cultural and artistic offerings, together with its tourist attractions, make the state a unique place for its visitors and inhabitants.

### Cultural and artistic education

The institutions that provide training options in the sector are of great importance, since they encourage the learning of different cultural aspects and, thus, their preservation. High schools and bachelor's degrees are mainly those that include classes and workshops that stimulate artistic learning and recreation. The disciplines of dance, plastic and visual arts, music, literature and theater, among others, stand out.

In Querétaro, according to the records of the Cultural Information System of the Federal Ministry of Tourism in 2023, there are 88 cultural and artistic education centers, higher than the figure reported in 2022, which was 73. Of the total, 51.1% are located in the municipality of Querétaro, followed by 10.2% in Corregidora and 8% in San Juan del Río.



## Cultural and artistic education centers in Querétaro registered in the Cultural Information System (2023)

MUNICIPALITIES	CENTERS	MUNICIPALITIES	CENTERS	MUNICIPALITIES	CENTERS
Amealco	Cultural Center Amealco		Culture House in Tancoyol		Epigmenio González Culture House
Arroyo Seco	Arroyo Seco Municipal House of Culture	Jalpan de Serra	Municipal Cultural House of Jalpan de Serra		Felipe Carrillo Puerto Culture House
Cadereyta de Montes	Cultural Center of Cadereyta		Cultural Center of Jalpan de Serra		Ignacio Padilla Culture House
Colón	Cultural Center Don Benito Juárez García		Culture House of Tilaco		Josefa Vergara y Hernández Culture House
	El Pueblito Culture House	Landa de Matamoros	Culture House of Landa de Matamoros		La Vía Héroe de Nacozari Culture House
	Sta. Bárbara Culture House		Agua Zarca Municipal House of Culture General Porfirio Rubio Rubio		Culture House Dr. Ignacio Mena Rosales
	Culture House Candiles		Community Development Center La Lagunita		Cultural Academic Center (CAC), Campus Juriquilla UNAM
	Cultural Center Tejeda		Culture House of La Cañada	Querétaro	Cultural Center Casa del Faldón
	Human Development Center Joaquín Herrera	El Marqués	Culture Center Ciudad Maderas		Community Cultural Center Epigmenio González
Corregidora	Human Development Center Lomas de Balvanera		Anahuac University Querétaro		Community Cultural Center Felipe Carrillo Puerto
	Human Development Center Los Ángeles	Pedro Escobedo	Municipal Culture House of Pedro Escobedo		Cultural Center The Old Railway Station
	Human Development Center Los Olvera	Peñamiller	Municipal Culture House of Peñamiller		Cultural Center La Lagartija
	Universidad TecMilenio, Campus Querétaro		Culture House of Pinal de Amoles		Cultural Center Mtro. Enrique Burgos Mondragón
	Culture House of Bernal Montes	Pinal de Amoles	Cultural Development Center of Ahuacatlán de Guadalupe		Cultural Center Sol y Luna
Ezequiel Montes	Culture House of Villa Progreso		BEMA Cultural Center		Cultural Center Tinta Creativa
	Municipal Cultural House of Ezequiel Montes	Querétaro	Melchor Ocampo Bicentennial Culture House		UNAM Cultural Center Querétaro (CCU)
Huimilpan	Culture House J. Guadalupe Velázquez		Cayetano Rubio Culture House		Art Center Bernardo Quintana
			Dr. Félix Osoreo Sotomayor Culture House		



Cultural and artistic education centers in Querétaro registered in the Cultural Information System (2023)

MUNICIPALITIES	CENTERS	MUNICIPALITIES	CENTERS	MUNICIPALITIES	CENTERS
Querétaro	Emerging Art Center	Querétaro	Ballet School-Company of the Academic Council of International Art and Dance	San Joaquín	Municipal Culture House of San Joaquín
	Proart Dance and Art Center		School of Fine Arts (UAQ)		Municipal Culture House of San Juan del Río
	Ignacio Mariano de las Casas Center for Art Education (CEDART)		Felva Mosso University Fashion Technological University	San Juan del Río	José María Morelos y Pavón Cultural and Convention Center
	Querétaro Center for the Arts (Royal College of Santa Rosa de Viterbo)		Music City College		Historical and Cultural Center
	Educational and Cultural Center of the State of Querétaro "Manuel Gómez Morín"		Cuauhtémoc University, Querétaro Branch		Ciudad Vive Oriente Cultural and Artistic Center
	National Center for Contemporary Dance		University of León, Querétaro Branch		Associated School of Artistic Initiation (EIAA)
	Querétaro Image Center		University of London, Querétaro Branch	School of Fine Arts, San Juan del Río Campus	
	Andamaxeí University Center		Professional Development University (UNIDEP), Querétaro Branch	Mesoamerican University, San Juan branch, S. C.	
	La Fábrica Forum		Humanitas University, Querétaro Campus	Tequisquiapan	Gloria Michaus Fernández Cultural Center
	Querétaro Active School of Photography		Marista University of Querétaro, A.C.		San Nicolás Culture House
School of Artistic Initiation Associated with Casa de Cultura Bicentenario	Mondragón University	Tolimán	Municipal Culture House of Tolimán		
Luthier School	Unea University		Community Cultural Center of Carrizalillo		

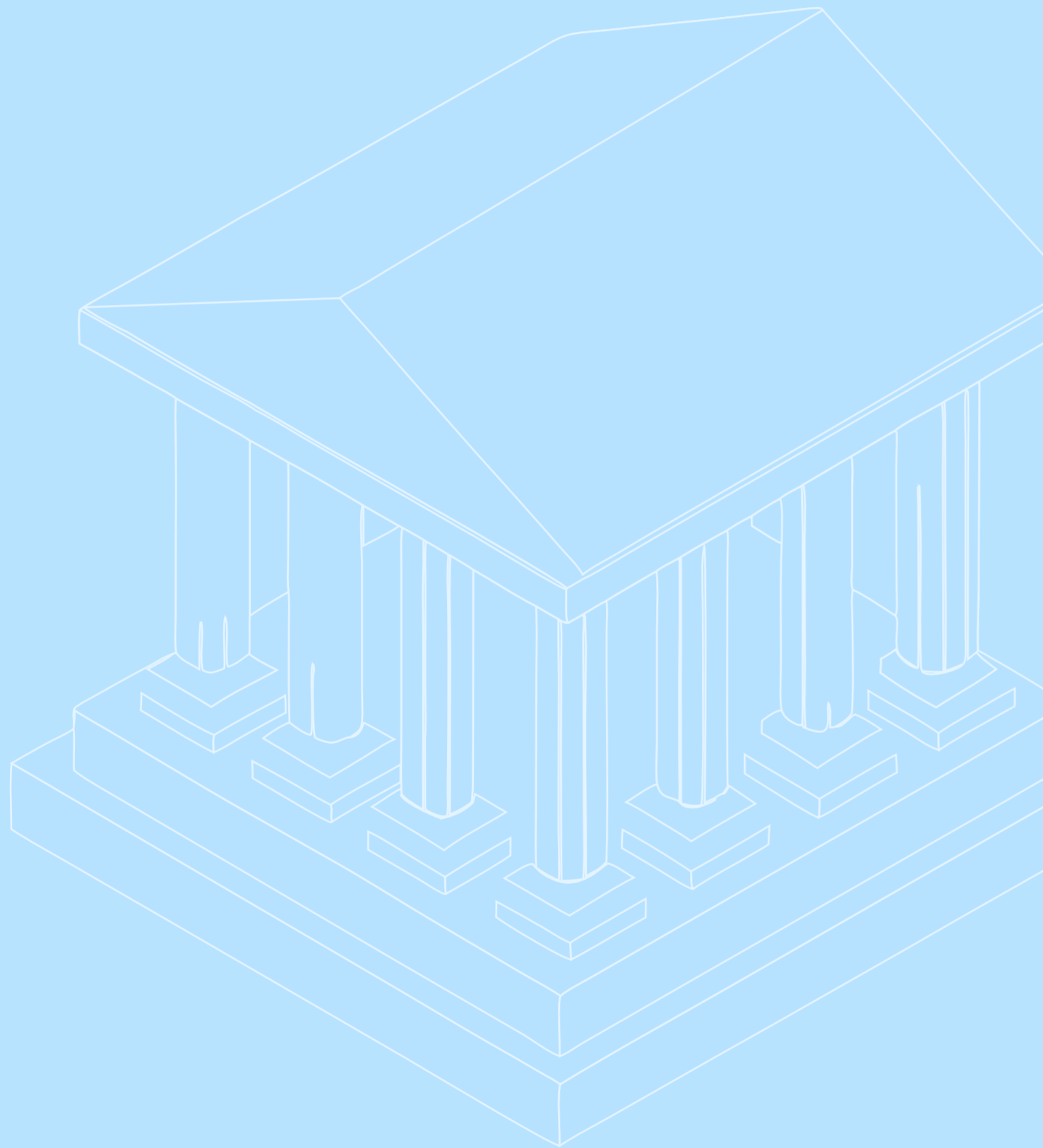
Source: Prepared by the authors with information from the Ministry of Culture (Cultural Information System), 2024.



## 8

## Government Services

The current administration conducts itself with strict adherence to the Querétaro State Development Plan 2021-2027 and the sixth guiding axis “Citizen Government” to establish policies aimed at the development and welfare of the population, thus focusing its actions in a rational and transparent manner, listening to the voice of citizens, optimizing resources and implementing new public policies for the governance of the state to achieve the welfare of the people of Querétaro.



# 8 Querétaro with good government

## 8.1 Branches of government

- 8.1.1 Executive Branch
- 8.1.2 Legislative Power
- 8.1.3 Judicial Branch

## 8.2 Government efficiency

- 8.2.1 Administrative quality
- 8.2.2 Government procedures and services
- 8.2.3 Access to information

## 8.3 Municipal governments

# QUERÉTARO WITH GOOD GOVERNMENT

THE CURRENT ADMINISTRATION  
ESTABLISHES POLICIES AIMED AT  
THE DEVELOPMENT AND WELFARE  
OF THE POPULATION

1,079

REQUESTS FOR ACCESS  
TO INFORMATION IN 2023

21%

OF THE BUDGET IS ALLOCATED  
TO WORKS AND ACTIONS

3,447

PUBLIC SERVANTS  
TRAINED IN 2023

270

TRAINING EVENTS FOR PUBLIC  
SERVANTS WERE CARRIED OUT







## 8.1

# Branches of government

The government of the entity subscribes to the principle of distribution of functions in accordance with Article 49 of the Political Constitution of the United Mexican States and Article 23 of the Constitution of the Free and Sovereign State of Querétaro, which states *“The public power of the state is divided, for its exercise, into Legislative, Executive and Judicial.”*

## 8.1.1

## Executive Branch

It has legal personality and its own assets; it has the human, financial and material resources for the efficient and correct performance of its functions.

It is headed by the Governor of the State, who legally represents the entity as of October 1st of the year of his election. The governor’s term of office lasts six years and once concluded, they may not hold office again. In order to carry out its functions, it will have as auxiliary agencies, organizations and municipalities.

The agencies of the Executive Branch of the State will conduct their activities in a planned and programmed manner, based on the policies, priorities and restrictions established by the Governor of the State, in order to meet the goals and objectives.





## Department and functions

1. **Department of Government.** By delegation of the Governor of the State, conducts the internal politics and governance of the State.
2. **Ministry of Finance.** Exercises the financial and tax administration of the public treasury of Querétaro.
3. **Ministry of Planning and Citizen Participation.** It studies and formulates programming and evaluation projects, as well as public policies and their assessment.
4. **Ministry of Comptroller's Office.** Promotes actions for prevention, control, evaluation, continuous improvement and citizen participation. Promotes a culture of transparency, accountability and the fight against corruption.
5. **Ministry of Sustainable Development.** Empowered to promote the economic development of the inhabitants of the State through environmental care, to promote a better quality of life.
6. **Ministry of Agricultural Development.** Promotes an economic model within the sector, aimed at increasing the production of food and raw materials and raising the income of producers.
7. **Ministry of Urban Development and Public Works.** In charge of ordering human settlements, regulating urban development, planning and executing the State's public works.
8. **Ministry of Education.** It guarantees a quality, equitable education with a sense of belonging for the entire population, which contributes to a harmonious education, within a framework of universal values.
9. **Ministry of Labor.** Seeks and maintains the balance and rapprochement between the factors of production, as well as labor stability with social justice in the state.





**10. Ministry of Tourism.** Formulates and conducts the policy of development and promotion of the tourist activity of the state.

**11. Ministry of Health.** Executes health policy and coordinates the health system, in accordance with federal guidelines and development conditions of the entity.

**12. Major Office.** It provides the administrative support required by the centralized public administration of the state.

**13. Ministry of Culture.** Promotes and encourages artistic and cultural development, promoting equity and equal opportunities among the population of Querétaro.

**14. Ministry of Citizen Security.** In charge of preserving the security and coexistence of citizens in spaces intended for public use and enjoyment. It prevents crimes and infractions with the committed participation of citizens.

**15. Ministry of Youth.** It plans, formulates, implements, coordinates and evaluates cross-cutting public policies aimed at the harmonious development of youth, within a framework of inclusion and equity of social, economic and cultural opportunities.

**16. Ministry of Social Development.** Coordinates policies, programs and actions that promote social development and the dignity of people.

**17. Chief of Staff.** Provides direct support services to the requirements of the head of the Executive Branch of the State.



## Querétaro State Executive Branch Directory

### Central agencies

#### General Counsel

Calle 5 de Mayo esquina Calle Pasteur. Col. Centro. Querétaro, Qro. C.P. 76000  
T. (442) 238 5000 • Ext. 5027

#### Office of the Governor

Calle 5 de Mayo esquina Calle Pasteur. Col. Centro. Querétaro, Qro. C.P. 76000  
T. (442) 238 5000

#### Ministry of Agricultural Development

Calle Ignacio Zaragoza No. 334. Pte. Col. Niños Héroes. Querétaro, Qro. C.P. 76010  
T. (442) 192 6600

#### Ministry of Sustainable Development

Blvd. Bernardo Quintana No. 204. Col. Carretas. Querétaro, Qro. C.P. 76050  
T. (442) 211 6800 • Ext. 2000

#### Ministry of Urban Development and Public Works

Calle Francisco I. Madero No. 72 Pte. Col. Centro. Querétaro, Qro. C.P. 76000  
T. (442) 227 1800

#### Ministry of Education

Av. Luis Pasteur No. 23 Sur. Col. Centro. Querétaro, Qro. C.P. 76000  
T. (442) 238 5000 • Ext. 5114

#### Department of Government

Calle 5 de Mayo No. 45. Colonia Centro. C.P. 76000  
T. (442) 238 5000 • Ext. 5040

#### Ministry of Comptroller's Office

Calle 5 de Mayo esquina Calle Pasteur. Col. Centro. Querétaro, Qro. C.P. 76000  
T. (442) 238 5000 • Ext. 5012



### Ministry of Social Development

Cto. Moisés Solana No. 171. Col. Balaustradas.  
 Querétaro, Qro. C.P. 76079  
 T. (442) 238 5220 • Ext. 5402, 5412, 5220

### Ministry of Youth

Bldv. Bernardo Quintana s/n. Col. Villas del  
 Parque Querétaro 2000. Querétaro, Qro. C.P.  
 76159  
 T. (442) 224 2254 | (442) 224 2626  
 (442) 212 0293

### Ministry of Finance

Calle 5 de Mayo esquina Calle Luis Pasteur, Col.  
 Centro. Querétaro, Qro. C.P. 76000  
 T. (442) 238 5000 • Ext. 5049

### Ministry of Planning and Citizen Participation

Calle Luis Pasteur No. 45 Nte. Col. Centro. C.P.  
 76000  
 T. (442) 244 1667

### Ministry of Health

Privada Circunvalación No. 6. Col. Jardines de  
 Querétaro. Querétaro, Qro. C.P. 76020  
 T. (442) 251 9000

### Ministry of Citizen Security

Av. 5 de Febrero No. 35. Col. San Antonio de la  
 Punta. Querétaro, Qro. C.P. 76179  
 T. (442) 309 1400

### Ministry of Tourism

Calle Luis Pasteur No. 4. Col. Centro. Queré-  
 taro, Qro. C.P. 76000  
 T. (442) 238 6400

### Ministry of Labor

Calle Francisco I. Madero No. 70. Planta alta.  
 Col. Centro. Querétaro, Qro. C.P. 76000  
 T. (442) 227 1800 | (442) 227 0610

### Private Ministry

Calle 5 de Mayo esquina Calle Pasteur. Col.  
 Centro. Querétaro, Qro. C.P. 76000  
 T. (442) 238 5000 • Ext. 5007

### Ministry of Culture

Calle José María Arteaga No. 89. Col. Centro.  
 Querétaro, Qro. C.P. 76000  
 T. (442) 251 9850 • Ext. 1025, 1026

## Deconcentrated agencies

### Educational and Cultural Center of the State of Querétaro “Manuel Gómez Morín” (CECEQ<sup>1</sup>)

Av. Constituyentes esquina Av. Luis Pasteur s/n.  
 Col. Villas del Sur. Querétaro, Qro. C.P. 76000  
 T. (442) 251 9600

### National Center for Contemporary Dance (CENADAC<sup>1</sup>)

Calle Sierra de Tilaco No. 201. Col. Villas del  
 Sol. Querétaro, Qro. C.P. 76046  
 T. (442) 213 8795

### Medical Arbitration Commission of the State of Querétaro (CAMEQ<sup>1</sup>)

Calle Corregidora No. 55 Nte. Despachos 101.  
 Col. Centro. Querétaro, Qro.  
 C.P. 76000  
 T. (442) 214 4819 | (442) 224 1094  
 (442) 224 1095

### State Council Against Addictions (CECA<sup>1</sup>)

Calle Independencia No. 97. Col. Centro. Que-  
 rétaro, Qro. C.P. 76000  
 T. (442) 212 0236 | (442) 212 0408



**State Population Council (COESPO<sup>1</sup>)**

Calle Benito Juárez No. 68 1er piso. Col. Centro. Querétaro, Qro. C.P. 76000  
T. (442) 240 1361 | (442) 224 8873

**State Public Safety Council (CESP<sup>1</sup>)**

Calle Río Tuxpan No. 107. Col. Desarrollo San Pablo. Querétaro, Qro. C.P. 76130  
T. (442) 309 1400

**State Civil Protection Coordination of Querétaro**

Camino a Quintanares Km. 0+500 Cuerpo B. Pedro Escobedo, Qro. C.P. 76724  
T. (448) 275 1496

**Querétaro State Normal School**

Calzada de Colón #14, Colonia Centro. Querétaro, Qro. C.P. 76000  
T. (442) 214 4941 | (442) 214 4741

**Institute for Constitutional Studies of the State of Querétaro (IECEQ<sup>1</sup>)**

Calle Miguel Hidalgo No. 2. Col. Centro. Querétaro, Qro. C.P. 76000  
T. (442) 224 0040 | (442) 212 0619

**Institute of Sports and Recreation of the State of Querétaro (INDEREQ<sup>1</sup>)**

Blvd. Bernardo Quintana No. 95. Col. Villas del Parque. Querétaro, Qro. C.P. 76140  
T. (442) 220 6813

**Entities**

**State Energy Agency**

Blvd. Bernardo Quintana No. 524 A. 2do Piso. Querétaro, Qro. C.P. 76140  
T. (442) 888 0756

**Querétaro International Airport (AIQ<sup>1</sup>)**

Carretera Estatal 200 Qro-Tequisquiapan No. 22500. Colón, Qro. C.P. 76270  
T. (442) 192 5500

**Querétaro House of Handicrafts (CQA<sup>1</sup>)**

Andador Libertad No. 52. Col. Centro. Querétaro, Qro. C.P. 76000  
T. (442) 224 3456

**Querétaro State Transplant Center (CETQRO<sup>1</sup>)**

Calle Prol. Ignacio Zaragoza No. 58. Col. La Capilla. Querétaro, Qro. C.P. 76170  
T. (442) 222 6553 | (442) 222 6654

**Querétaro State High School (COBAQ<sup>1</sup>)**

Av. Constituyentes No. 35 Ote 2do piso. Col. San Francisquito. Querétaro, Qro. C.P. 76058  
T. (442) 291 9400 • Ext. 2000

**College of Technical Professional Education of the State of Querétaro (CONALEP<sup>1</sup> Querétaro)**

Calle Fray Juan de Zumárraga No. 42. Col. Cimatarío. Querétaro, Qro. C.P. 76030  
T. (442) 216 2663 | (442) 215 7487  
(442) 242 3049

**College of Scientific and Technological Studies of the State of Querétaro (CECyTEQ<sup>1</sup>)**

Calle Lic. Zacarías Oñate No.13, Col. Cimatarío. Querétaro, Qro. C.P. 76030  
T. (442) 216 3202 | (442) 242 1454



**State Water Commission (CEA<sup>1</sup>)**

Prol. Zaragoza No. 10 local 12. Col. Villas Campestre. Corregidora, Qro. C.P. 76902  
T. (442) 211 0600

**State Infrastructure Commission (CEI<sup>1</sup>)**

Av. Luis Pasteur No. 27 Nte. Col. Centro. Querétaro, Qro. C.P. 76000  
T. (442) 689 0042 | (442) 689 0666

**Council of Science and Technology of the State of Querétaro (CONCyTEQ<sup>1</sup>)**

Av. Luis Pasteur No. 36 Sur. Col. Centro. Querétaro, Qro. C.P. 76000  
T. (442) 212 7266 | (442) 214 3685  
(442) 224 3218

**Querétaro Institute of Arts and Crafts (IAOQ<sup>1</sup>)**

Calle Emeterio González No. 60. Col. Hércules. Querétaro, Qro. C.P. 76069  
T. (442) 234 6844 • Ext. 101, 103, 106

**Institute of Training for the Work of the State of Querétaro (ICATEQ<sup>1</sup>)**

Calle Fray Pedro de Gante No. 10. Col. Cimatarío. Querétaro, Qro. C.P. 76030  
T. (442) 348 1100

**Institute of Educational Physical Infrastructure of the State of Querétaro (IIFEQ<sup>1</sup>)**

Calle Guatemala No. 2-A. Col. Lomas de Querétaro. Querétaro, Qro. C.P. 76190  
T. (442) 216 2353 | (442) 216 2871  
(442) 216 1276 • Ext. 101

**Housing Institute of the State of Querétaro (IVEQ<sup>1</sup>)**

Av. Pie de la Cuesta No. 2121 Int. 18. Col. Lomas de San Pedrito Peñuelas. Querétaro, Qro. C.P. 76148  
T. (442) 192 9200

**Querétaro Women's Institute (IQM<sup>1</sup>)**

Calle José María Pino Suárez No. 229. Col. Centro. Querétaro, Qro. C.P. 76000  
T. (442) 215 3404

**Women's Justice Center**

Av. Luis Pasteur No. 997. Col. Villas del Cimatarío, Claustros del Sur. Querétaro, Qro. C.P. 76085  
T. (442) 215 7684

**Querétaro State Festivities Board (PFQ<sup>1</sup>)**

Acceso 1, Nave 12 int. 112. Fraccionamiento Industrial La Montaña. Querétaro, Qro. C.P. 76150  
T. (442) 214 1289

**State Attorney's Office of Environmental Protection and Urban Development (PEPMADU<sup>1</sup>)**

Prol. Corregidora Sur No. 25 int.101. Col. Centro. Querétaro, Qro. C.P. 76000  
T. (442) 215 7660 | (442) 215 7836

**System for the Integral Development of the Family of the State of Querétaro (DIF<sup>1</sup>)**

Av. Luis Pasteur No. 6A. Col. Centro. Querétaro, Qro. C.P. 76000  
T. (442) 238 5108 | (442) 238 5109

**Unit of Services for Basic Education in the State (USEBEQ<sup>1</sup>)**

Av. Magisterio No. 1000. Col. Colinas del Cimatarío. Querétaro, Qro. C.P. 76090  
T. (442) 238 6000



### Technological University of Querétaro (UTEQ<sup>1</sup>)

Av. Pie de la Cuesta No. 2501. Col. Unidad Nacional. Querétaro, Qro. C.P. 76148  
 T. (442) 209 6100

### Aeronautical University in Querétaro (UNAQ<sup>1</sup>)

Carretera Estatal 200 Qro-Tequisquiapan No. 22154. Parque Aeroespacial. Colón, Qro. C.P. 76278  
 T. (442) 101 6600

### Polytechnic University of Querétaro (UPQ<sup>1</sup>)

Carretera Estatal 420 s/n. El Marqués, Qro. C.P. 76240  
 T. (442) 101 9000

### Polytechnic University of Santa Rosa Jáuregui (UPSRJ<sup>1</sup>)

Carretera Federal 57 Qro-SLP, km 31+150. Parque Industrial Querétaro, Santa Rosa Jáuregui. C.P. 76220  
 T. (442) 196 1300 • Ext. 111

### Technological University of Corregidora (UTC<sup>1</sup>)

Carretera Santa Barbara - Coroneo, km 11.2. Corregidora, Qro. C.P. 76900  
 T. (442) 483 0070

### San Juan del Río Technological University (UTSJR<sup>1</sup>)

Av. La Palma No. 125. Col. Vista Hermosa. San Juan del Río, Qro. C.P. 76800  
 T. (427) 129 2000

Source: Prepared by the authors with data from the website of the State Government, 2024.

Note: <sup>1</sup> By its acronym in Spanish.







## 8.1.2

**Legislative Power**

This power is vested in an assembly called the “State Legislature”, which has its own legal personality and assets. It shall have the human, financial and material resources necessary for the efficient and correct performance of its duties.

The legislature is composed of popular representatives, who are called “Deputies”. They remain in office for three years with the possibility of repeating the subsequent term in accordance with the legal provisions applicable to the principle of reelection.

For the operation of the Legislature, the attendance of at least thirteen deputies at the plenary sessions and of a simple majority of the members in the other bodies is required.

**Structure and Functions**

At the beginning of the Legislature, all elected Deputies are part of a group or legislative fractions, which shall be formed by each political party, coalition or independent Deputies with presence in the Legislature.

- ▶ **Legislative Groups.** Formed by Deputies who share the same party affiliation in order to articulate politically and achieve better internal organization.
- ▶ **Legislative Fractions.** Composed of the popular representation of the political parties that obtained a single seat in the electoral process.
- ▶ **Board of Directors.** It is composed of a chairman, a vice-chairman, two secretaries and three alternates, one in the absence of the vice-chairman and two in the absence of the secretaries. Its main function is to conduct and organize the work and performance of the Legislative Branch under the principles of impartiality and objectivity.
- ▶ **Political Coordination Board.** It is the body responsible for procuring the political decision making of the State Legislature. It is made up of the coordinators of the legislative groups and fractions.
- ▶ **Ordinary Committees.** These are legislative bodies of a permanent nature that issue rulings and place in a state of resolution the initiatives and matters to be heard by the Plenary of the Legislature. Official publication dates of agreements and decrees are presented.
- ▶ **Special committees.** They are responsible for carrying out specific tasks assigned by the plenary session of the Legislature at the time of their creation. They integrate transitory commissions and establish official publication dates, of agreements and decrees.
- ▶ **Transparency Committee of the Legislative Branch of the State.** It is responsible for overseeing, instructing and coordinating actions and procedures for the dissemination of information of public interest.
- ▶ **Agencies.** These are administrative units that provide support to legislators and legislative bodies.



## Legislative committees

These are permanent bodies responsible for ruling on and placing in a state of resolution the initiatives and other matters that concern the Plenary of the State Legislature in accordance with the specialized competence by subject matter.

There are a total of 25 Ordinary Committees with 3 members each from a different legislative group or fraction. Each deputy may belong to more than one of the following committees:

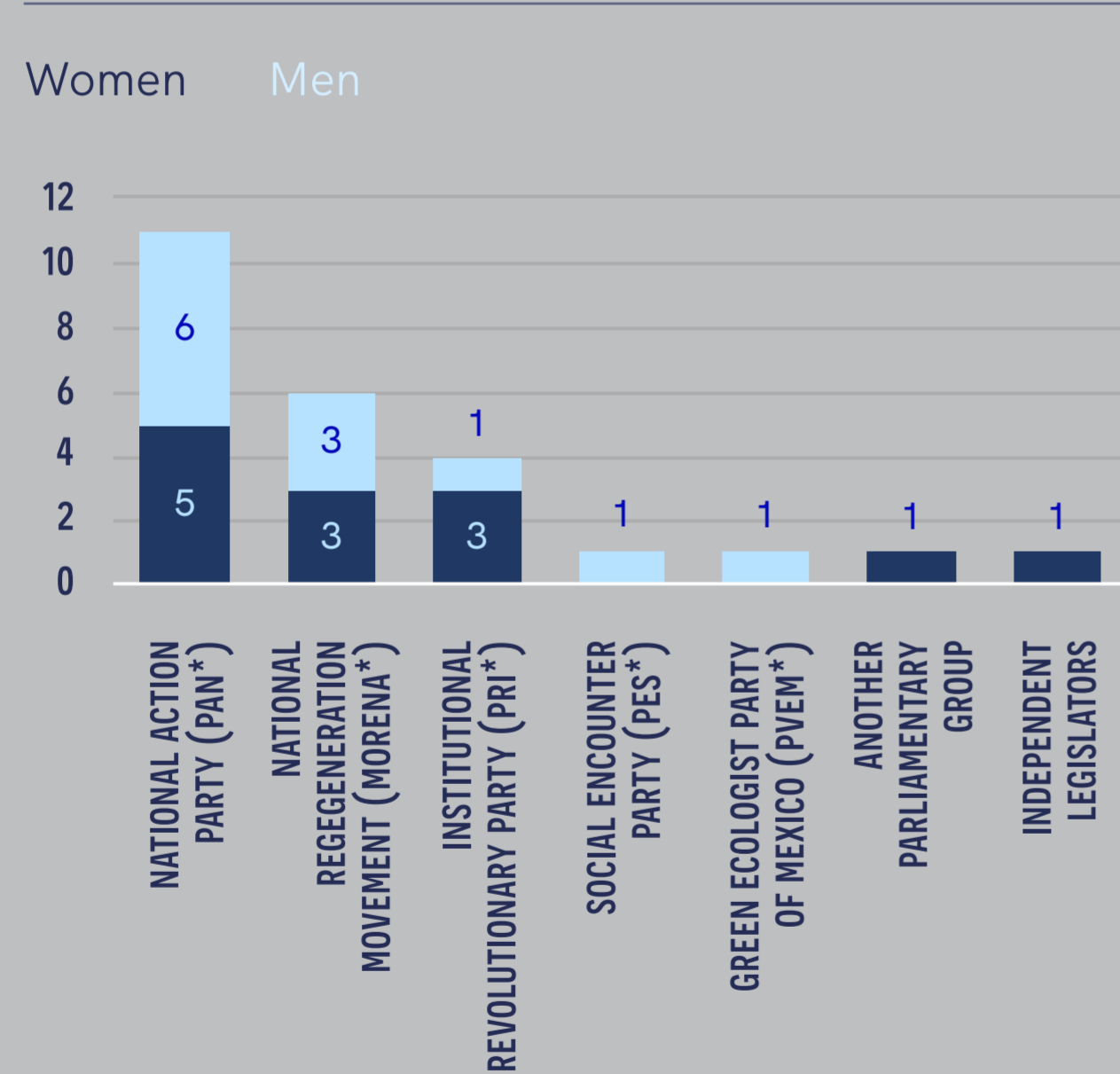
- ▶ Access to information and accountability
- ▶ Administration and Procurement of Justice
- ▶ Attention to migrations
- ▶ Indigenous Affairs
- ▶ Municipal Affairs
- ▶ Science, Technology and Innovation
- ▶ Sustainable Agricultural and Rural Development
- ▶ Sustainable Economic Development, Entrepreneurship and Commerce
- ▶ Social Development, Vulnerable Groups and Housing
- ▶ Urban Development, Public Works and Communications
- ▶ Education and Culture
- ▶ Family and Rights of Children and Adolescents
- ▶ Governance, Public Administration and Electoral Matters
- ▶ Gender Equality and Human Rights
- ▶ Instructor
- ▶ Youth and Sports
- ▶ Environment and Climate Change
- ▶ Sustainable Mobility and Transit
- ▶ Citizen Participation
- ▶ Planning and Budgeting
- ▶ Constitutional Points
- ▶ Health
- ▶ Public Safety and Civil Protection
- ▶ Follow-up of the 2030 Agenda
- ▶ Tourism





In 2020, according to the National Census of State Legislative Branches, Mexico registered 1,113 congressional legislators. Querétaro accounted for 2.2% of the total, corresponding to 25 legislators, of which 12 were men and 13 were women.

### Legislators of the Congress by type of assignment in Querétaro (2020)



Source: Prepared by the authors with data from the National Institute of Statistics and Geography (National Census of State Legislative Branches 2020), 2024.

Note: \* By its acronym in Spanish.





### 8.1.3

## Judicial Branch

The exercise of the judicial function is vested in a Superior Court of Justice and in the judges and other organs. The Judiciary is competent to apply the laws in civil, criminal and electoral judicial matters of the common law, as well as in federal matters when authorized by law.

The Judicial Branch shall have a person presiding over it, who shall be called the President of the Judicial Branch of the State of Querétaro. He shall hold office for three years and shall not be reelected for the immediately following term.

The State is divided into judicial districts, the first of which is its capital:

- ▶ I. **Querétaro:** Querétaro, El Marqués and Corregidora.
- ▶ II. **San Juan del Río:** San Juan del Río, Tequisquiapan and Pedro Escobedo.
- ▶ III. **Cadereyta de Montes:** Cadereyta de Montes, Ezequiel Montes and San Joaquín.
- ▶ IV. **Tolimán:** Tolimán, Colón and Peñamiller.
- ▶ V. **Jalpan de Serra:** Jalpan de Serra, Pinal de Amoles, Landa de Matamoros and Arroyo Seco.
- ▶ VI. **Amealco de Bonfil:** Amealco de Bonfil y Huimilpan.



## Structure and Functions

- ▶ **Superior Court of Justice.** The Court shall function in plenary session or in collegiate or unitary chambers. It shall be composed of thirteen regular judges and eight supernumerary judges, who shall remain in office for up to three years and may be reelected.
- ▶ **Council of the Judiciary.** A body of the Judicial Branch with technical and managerial independence and autonomy to issue its resolutions. Responsible for the administration, supervision, discipline and judicial career of the Judicial Branch, with the exception of Magistrates and second instance personnel of the Superior Court of Justice. The Council of the Judiciary shall work in plenary or in committees.
- ▶ **Courts of first instance.** The following will be courts of first instance: 1) civil courts; 2) those specialized in commercial oral proceedings; 3) family courts; 4) courts of the traditional



criminal system and the accusatory criminal system; 5) courts for the execution of criminal sanctions; 6) mixed courts; 7) courts specialized in criminal justice for adolescents. Judges of first instance shall serve for six years, and may be ratified for another nine years, according to their performance evaluation.

- ▶ **Minor Courts.** In the state there will be Minor Courts in each of the towns that are the head of the municipalities and in the delegations that merit it. Minor court judges shall serve for a term of six years, and may be ratified for another nine years, according to their performance evaluation.



## 8.2

# Government efficiency

## 8.2.1

## Administrative quality

One of the main responsibilities of government administration is to provide optimal responses to citizens' needs. To this end, it promotes quality services in accordance with the human and socioeconomic development of Querétaro.

## Trained public servants

In order to provide quality citizen service and improve management, efficiency and service mentality - elements stipulated in the 2021 - 2027 Development Plan, the state government places special emphasis on training all public servants. Following up on this objective, the government was certified in the CONOCER EC105 Competency Standard.

Through training, public servants are expected to contribute to enhance the operational and technical capacity of government agencies through knowledge, skills development and performance improvement.

Therefore, during 2023, the state government carried out training programs, which focused mainly on the following topics:

- ▶ Code of Ethics and Administrative Responsibilities Law
- ▶ Human Rights and Gender Perspective
- ▶ Customer Service, Communication and Assertiveness
- ▶ Technical courses on digital tools.



In 2023, 270 training events were carried out with 3,447 public servants, achieving a coverage of 70.8% of the total personnel on the payroll. Among the most important achievements in the area of training are the following:

- ▶ Accreditation of 3,867 people in the Code of Ethics course, which corresponds to 86% of the active personnel in the central sector of the Executive Branch of the State of Querétaro.
- ▶ Consolidation of the Internal Instructors process, providing 614 hours of training for their colleagues.
- ▶ Collaboration in the strategy “Society of Respect: We are Querétaro”, implemented by the Ministry of Education, through the participation of personnel in courses at the Museum of Memory and Tolerance: Culture of Peace, Gender Equality and Memory and Tolerance.





## Statement of net worth of public servants

According to the State Development Plan 2021 - 2027, the mission of the current government is “To increase the institutional and service level based on an efficient, sufficient and transparent public administration.” In the area of transparency, several factors are taken into account, one of which is the obligation to submit the Statement of Assets and Interests.

In order to comply with the provisions of Articles 108, last paragraph of the Constitution, 32, 33, 46 and 49, section IV of the General Law of Administrative Responsibilities, public servants are required to file their declarations of assets and interests on the DeclaraNet platform, an electronic tool administered by the Ministry of Public Administration.

The filing of the declaration can be done under three different scenarios:

1. Initial: It is submitted within 60 calendar days after taking possession on the occasion of the:
  - a. Entry into public service for the first time.
  - b. Reinstatement to public service after 60 calendar days from the conclusion of their last assignment.
2. Modification of assets: It is presented during the month of May of each year.
3. Conclusion: It is submitted within 60 calendar days of completion.







During 2023, 39,735 public servants were obliged to present the modification of their asset declaration, of which one hundred percent complied in due time and form.

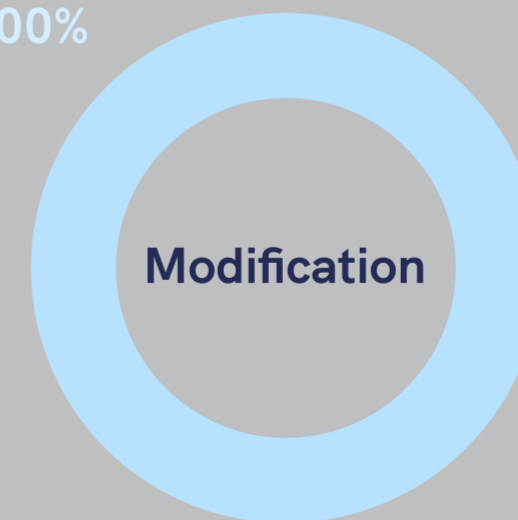
With respect to the initial or concluding declaration, 8,479 public servants were required to present it, however, only 5,748 did so, a figure equivalent to 67.8%. Despite not complying with all of them, there was an 11.4 percentage point improvement with respect to 2022, when only 56.4% of the servers did so.

### Presentation by type of declaration of public servants in Querétaro (2023)

Presented

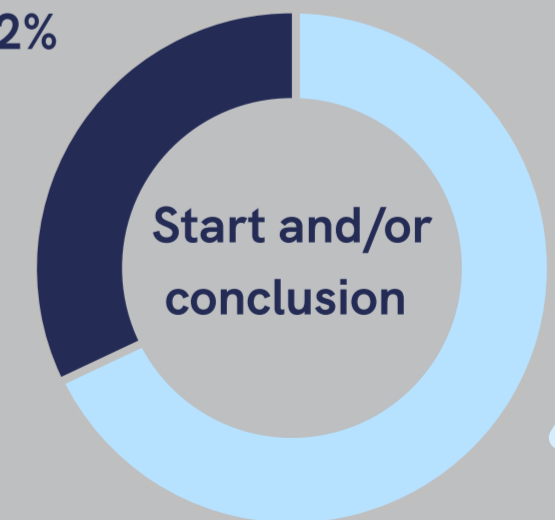
Not presented

100%



Modification

32.2%



Start and/or conclusion

67.8%

Source: Prepared by the authors with information from the Comptroller's Office, 2024.



## State budget

### Revenue Law of the State of Querétaro for fiscal year 2023

A state's income is the basis for the State Executive Branch to decide, based on criteria of rationality, feasibility and priority, on the works and actions that meet the requirements of society and that the planning and development of the entity demand for the permanent benefit of the population.

According to the Revenue Law of the State of Querétaro for Fiscal Year 2023, the State of Querétaro estimated to receive the following revenues in 2023:

### Income Law in Querétaro (2023)

CONCEPT	AMOUNT	TOTAL	DISTRIBUTION
Taxes	5,518,935,537		
Social security dues and contributions	0		
Special contributions	0		
Rights	2,147,013,369		
Products	309,487,695		
Usability	202,283,406		
Revenues from sale of goods, rendering of services and other revenues	0		
<b>Total own revenues</b>		<b>8,177,720,007</b>	<b>17%</b>
Shares	19,464,250,129		
Contributions	15,463,564,617		
Agreements	3,547,189,518		
Incentives derived from tax collaboration	1,458,745,217		
Funds other than contributions	0		
<b>Shares, contributions, agreements, incentives derived from fiscal collaboration and funds other than contributions</b>		<b>39,933,749,481</b>	<b>83%</b>
Transfers, allowances, subsidies, grants, pensions and retirements	0		
Extraordinary revenue	0		
<b>Total Income</b>		<b>48,111,469,488</b>	<b>93.2%</b>
<b>Total own financing</b>		<b>3,525,360,041</b>	<b>6.8%</b>
<b>Total revenues for fiscal year 2022</b>		<b>51,636,829,529</b>	

Source: Prepared by the Company with data from the Revenue Law of the State of Querétaro for fiscal year 2023, 2024.



Pursuant to Article 53 TER of the Law for the Management of Public Resources of the State of Querétaro, the own financing of the Executive Branch of the State of Querétaro, foreseen at the beginning of fiscal year 2023, was made up as follows:

### State of Querétaro's own financing (2023)

CONCEPT	AMOUNT	TOTAL
Federal earmarked transfers	74,238,515	
Availability in terms of the Financial Discipline Law for Federal Entities and Municipalities	3,451,121,526	
<b>Own financing</b>		<b>3,525,360,041</b>

Source: Prepared by the Company with data from the Revenue Law of the State of Querétaro for fiscal year 2023, 2024.

## State of Querétaro Expenditure Budget Decree for fiscal year 2023

It is the financial instrument through which the State Government expresses the priorities of its management to respond to the requirements of society and the needs of Querétaro's families.

The objective of the Public Expenditure Policy of the State of Querétaro is as follows:

- ▶ To redistribute income.
- ▶ To use public resources efficiently.
- ▶ To prioritize the needs of the population.
- ▶ To incentivize productive public investment.
- ▶ To promote economic, social and sectorial development.
- ▶ To include vulnerable groups.

Within the expenditure budget of the State of Querétaro for fiscal year 2023, transfers from parastatal entities accounted for the largest volume of the budget, with 43.9%.

### State Expenditure Budget (2023)

CONCEPT	AMOUNT	DISTRIBUTION
Transfers to municipalities	\$8,363,693,440	16.2%
Transfers to the Legislative Branch	\$366,862,034	0.7%
Transfers to the Judicial Branch	\$1,224,620,028	2.4%
Transfers to autonomous agencies and administrative courts	\$1,762,918,461	3.4%
<b>Total transfers to parastatals</b>	<b>\$22,691,616,101</b>	<b>43.9%</b>
Central sector units and auxiliary bodies	\$5,210,450,444	10.1%
Public debt	\$-	0.0%
Retirement and pensions	\$1,153,361,722	2.2%
Works and actions	\$10,863,307,299	21.0%
<b>State Expenditure Budget</b>	<b>\$51,636,829,529</b>	<b>100%</b>

Source: Prepared by the authors based on data from the Decree of the State of Querétaro's Expenditure Budget for fiscal year 2023, 2024.



The budget is mainly allocated to the state's public security, through the Ministry of Citizen Security. The Ministry of Youth showed the highest annual budget growth (18.6%), followed by the Office of the Chief of Staff (13.3%) and the Ministry of Urban Development and Public Works (12%).

### Budget allocated to central sector agencies and auxiliary bodies (2023)

CONCEPT	AMOUNT	DISTRIBUTION
Governorship	\$7,674,475	0.1%
Chief of Staff	\$477,727,458	9.2%
Government Sector	\$577,648,860	11.1%
Public Safety Sector	\$854,183,525	16.4%
Finance Sector	\$631,089,187	12.1%
Comptroller's Office Sector	\$153,325,066	2.9%
Sustainable Development Sector	\$157,449,321	3%
Agricultural Development Sector	\$167,199,605	3.2%
Urban Development and Public Works Sector	\$223,222,411	4.3%
Education Sector	\$464,140,391	8.9%
Youth Sector	\$50,407,745	1%
Social Development Sector	\$101,921,009	2%
Labor Sector	\$181,115,732	3.5%
Tourism Sector	\$143,814,475	2.8%
Health Sector	\$34,748,637	0.7%
General Counsel Sector	\$748,377,837	14.4%
Planning and Citizen Participation Sector	\$49,845,937	1%
Culture Sector	\$186,558,773	3.6%
<b>Total</b>	<b>\$5,210,450,444</b>	<b>100%</b>

Source: Prepared by the authors based on data from the Decree of the State of Querétaro's Expenditure Budget for fiscal year 2023, 2024.



8.2.2

### Government procedures and services

The State Public Administration provides citizens with the tools they need to spend the least amount of time of their lives on paperwork, which in turn is handled in a timely and quality manner.

To meet this objective, digitalization is considered a central element, which is why in 2023 the Executive Branch of the State of Querétaro implemented a single portal, which contains the State Catalog of Regulations, Procedures and Services <https://tramitesqueretaro.mx/inicio>, through which citizens can access the State File of Procedures and Services, a platform for requesting and in some cases resolving state procedures and services digitally. In the first stage, the four metropolitan municipalities (Querétaro, Corregidora, El Marqués and San Juan del Río) have been incorporated.

## State Registry of Procedures and Services (RETS by its acronym in Spanish)

The Regulatory Improvement Commission of the State of Querétaro is responsible for managing the State Registry of Procedures and Services of the Executive Branch of the State of Querétaro, in order to provide legal certainty to individuals, promote transparency in public administration, facilitate regulatory compliance and encourage the use of information technology.

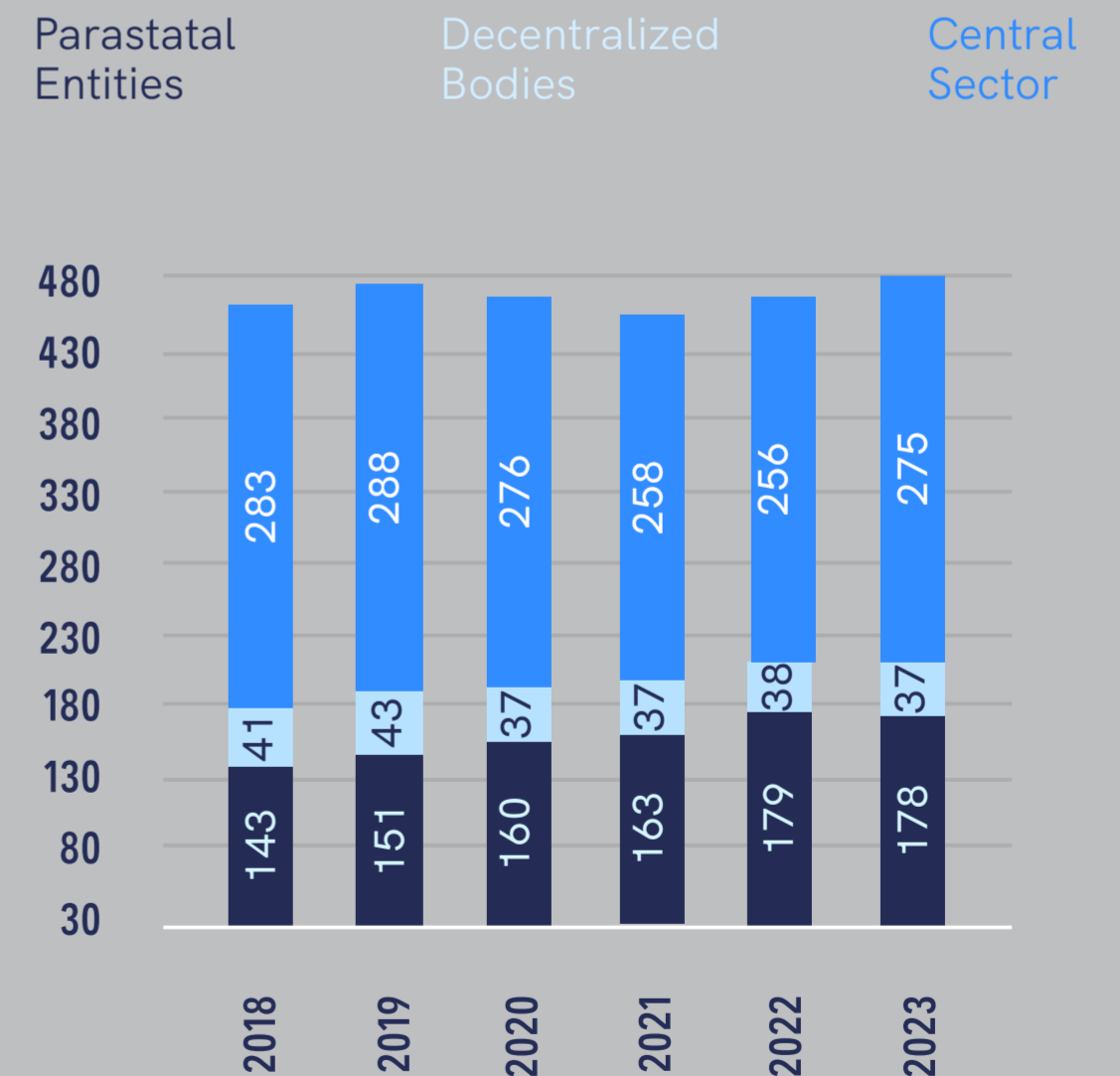
In order for the procedures and services to be applicable, it is indispensable that they are duly registered in said registry. At the end of 2023, this tool concentrated a total of 490 procedures and services, a figure that maintains a growth of 3.6% with respect to 2022.

### Procedures and Services of the Executive Branch of the State of Querétaro (2023)

AGENCIES	NUMBER OF PROCEDURES AND SERVICES	DISTRIBUTION
Parastatal Entities	178	36.3%
Decentralized Bodies	37	7.6%
Central Sector	275	56.1%
<b>Total</b>	<b>490</b>	<b>100%</b>

Source: Prepared by the authors with data from the Regulatory Improvement Commission, 2024.

### Evolution of the procedures and services of the Executive Branch of the State of Querétaro (2018 - 2023)



Source: Prepared by the authors with data from the Regulatory Improvement Commission, 2024.



### 8.2.3

## Access to information

The axis Querétaro with Good Governance of the State Development Plan 2021-2027 establishes as one of its strategies to honor full transparency and access to information. Based on this, a line of action was adopted to facilitate citizen access to government information.

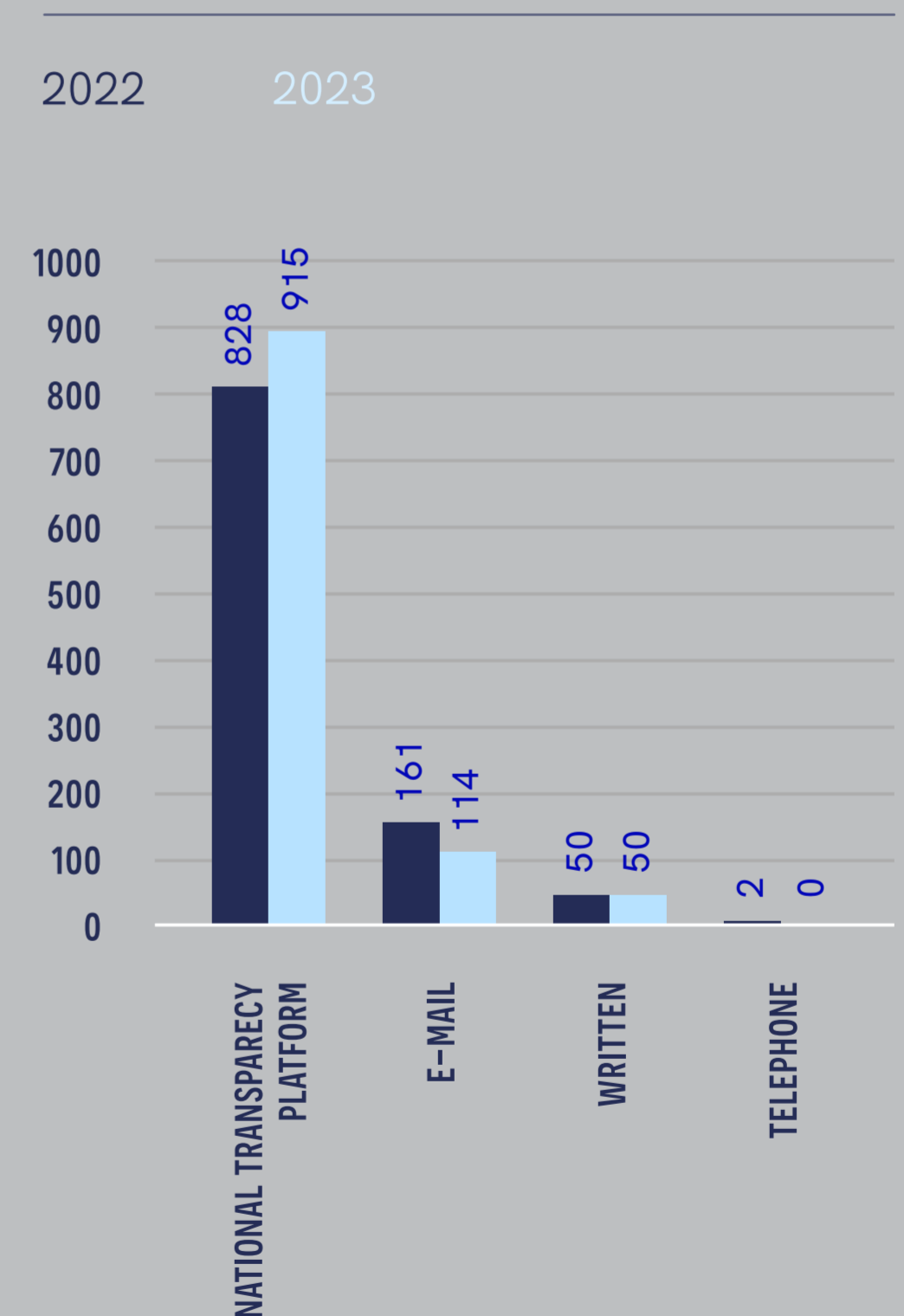
### Access to government information.

During fiscal year 2023, the Transparency Unit of the Executive Branch of the State of Queretaro received and registered a total of 1,079 requests for access to information, which, accumulating those received between 2021 and 2022, add up to a total of 3,189 requests, all of which were handled in due time and form.

These requests were received by four means:

1. Systems: National Transparency Platform ([www.plataformadetransparencia.org.mx/web/guest/inicio](http://www.plataformadetransparencia.org.mx/web/guest/inicio))
2. E-mail: [utpe@queretaro.gob.mx](mailto:utpe@queretaro.gob.mx)
3. In writing: in person at the office of the Transparency Unit, currently located at Luis Pasteur Street no. 5, Col. Centro, Querétaro, Qro. C.P. 76000
4. By telephone: registering the petitioner's request at the Transparency Unit by calling (442) 238 5000 ext. 5187, 5543 or 5544.

### Information request channels (2022 - 2023)



Source: Prepared by the authors with data from the Regulatory Improvement Commission, 2024.



## 8.3

# Municipal governments



According to the Political Constitution of the State of Querétaro, the division of the state comprises 18 municipalities, which have the autonomy to organize the municipal public administration, have their own authorities, specific functions and free administration.

Each municipality will be governed by a City Council composed of a Municipal President, Trustees and Aldermen. The purpose of the City

Council shall be to gather and attend to the collective and social needs within their respective jurisdictions.

Municipalities are empowered to formulate, approve and administer zoning and municipal urban development plans; participate in the creation and administration of their territorial reserves; control and supervise the use of land in

their territorial jurisdictions; intervene in the regularization of urban land tenure; grant licenses and permits for construction; participate in the creation and administration of ecological reserve zones and approve and exercise their powers in matters of preservation and restoration of the ecological balance and environmental protection.



## Directory of the municipal governments of the state of Querétaro



### Amealco de Bonfil

Plaza de la Constitución No. 20.  
Col. Centro. Amealco de Bonfil,  
Qro. C.P. 76850  
T. (448) 278 0101  
[www.amealco.gob.mx/portal/](http://www.amealco.gob.mx/portal/)



### Colón

Jardín Héroes de la Revolución No.  
1. Col. Centro. Colón, Qro.  
C.P. 76270  
T. (419) 292 0108  
[www.colon.gob.mx](http://www.colon.gob.mx)



### Ezequiel Montes

Calle Belisario Domínguez No. 104.  
Col. Centro. Ezequiel Montes, Qro.  
C.P. 76650  
T. (441) 277 0707  
[www.ezequielmontes.gob.mx](http://www.ezequielmontes.gob.mx)



### Arroyo Seco

Plaza Principal s/n. Col. Centro.  
Arroyo Seco, Qro. C.P. 76400  
T. (487) 874 2110 | (487) 874 2111  
[www.arroyoseco.gob.mx](http://www.arroyoseco.gob.mx)



### Corregidora

Calle Ex Hacienda El Cerrito No.  
100. Col. El Pueblito. Corregidora,  
Qro. C.P. 76900  
T. (442) 209 6000 | (442) 384 5500  
[www.corregidora.gob.mx](http://www.corregidora.gob.mx)



### Huimilpan

Calle Reforma No. 158 Ote. Col.  
Centro. Huimilpan, Qro. C.P. 76950  
T. (448) 278 5047  
[www.huimilpan.gob.mx](http://www.huimilpan.gob.mx)



### Cadereyta de Montes

Calle Benito Juárez No. 10. Col.  
Centro. Cadereyta de Montes, Qro.  
C.P. 76500  
T. (441) 276 0180  
[www.cadereytademontes.gob.mx](http://www.cadereytademontes.gob.mx)



### El Marqués

Calle Venustiano Carranza No. 2.  
Col. La Cañada. El Marqués, Qro.  
C.P. 76240  
T. (442) 238 8400  
[www.elmarques.gob.mx](http://www.elmarques.gob.mx)



### Jalpan de Serra

Calle Independencia No. 12. Col.  
Centro. Jalpan de Serra, Qro.  
C.P. 76340  
T. (441) 296 0243 | (441) 296 0285  
(441) 296 0344  
[www.jalpan.gob.mx](http://www.jalpan.gob.mx)





### Landa de Matamoros

Calle Constitución s/n. Col. Centro.  
Landa de Matamoros, Qro.  
C.P. 76360  
T. (441) 292 5207 | (441) 292 5208  
(441) 292 5209  
[www.landadematamorosqro.gob.mx](http://www.landadematamorosqro.gob.mx)



### Pinal de Amoles

Calle Benito Juárez No. 4. Col.  
Centro, Pinal de Amoles, Qro.  
C.P. 76300  
T. (441) 292 5030 | (441) 292 5018  
[www.pinaldeamoles.gob.mx](http://www.pinaldeamoles.gob.mx)



### San Juan del Río

Av. Juárez No. 26 Pte. Col. Centro.  
San Juan del Río, Qro. C.P. 76800  
T. (427) 268 1000 | (427) 689 0012  
[www.sanjuandelrio.gob.mx](http://www.sanjuandelrio.gob.mx)



### Pedro Escobedo

Calle Panamericana No. 2. Col.  
Centro. Pedro Escobedo, Qro.  
C.P. 76700  
T. (448) 275 0006  
[www.pedroescobedo.gob.mx](http://www.pedroescobedo.gob.mx)



### Querétaro

Bld. Bernardo Quintana No.10000.  
Col. Centro Sur. Querétaro, Qro.  
C.P. 76090  
T. (442) 238 7700  
[www.municipiodequeretaro.gob.mx](http://www.municipiodequeretaro.gob.mx)



### Tequisquiapan

Calle Primer Rnto. De Palmas No.  
5. Col. Los Sabinos. Tequisquiapan,  
Qro. C.P. 76750  
T. (414) 273 2327  
[www.municipiodetequisquiapan.gob.mx](http://www.municipiodetequisquiapan.gob.mx)



### Peñamiller

Plaza Principal s/n. Col. Centro.  
Peñamiller, Qro. C.P. 76450  
T. (441) 296 6052  
[www.penamiller.gob.mx](http://www.penamiller.gob.mx)



### San Joaquín

Palacio Municipal s/n. Col. Centro.  
San Joaquín, Qro. C.P. 76550  
T. (441) 293 5000  
[www.sanjoaquin.gob.mx](http://www.sanjoaquin.gob.mx)



### Tolimán

Calle Benito Juárez No. 3. Col.  
Centro, Toluimán, Qro. C.P. 76600  
T. (441) 296 7206  
[www.toliman.gob.mx](http://www.toliman.gob.mx)

Sources: Prepared by the authors with information from the websites of the Municipal Presidencies of the State of Querétaro, 2024.



## Acknowledgement

The Economic yearbook 2024 was possible thanks to the effort made by all the people, various institutions, organizations, and agencies that contributed to its compilation.

On behalf of the Ministry of Sustainable Development, we appreciate the commitment of each of the collaborators who contributed with engagement and dedication in the publication of this document, which makes possible to know the development and expansion of the state.

Thank you very much!





## Simplified privacy notice

The Ministry of Sustainable Development of the Executive Branch of the State of Querétaro is responsible for the processing of personal data provided to us for the integration and illustration of the State Economic Yearbook.

In case of refusal to process your personal data required for this purpose, you can submit your application for the exercise of the Access, Rectification, Cancellation, and Opposition (ARCO) rights through the National Transparency Platform or before the Transparency Unit of the Executive Branch of the State of Querétaro.

If you want to know more about our complete privacy notice, please visit <http://www.queretaro.gob.mx/sedesu> or <http://bit.ly/2zqyiGf> at the Ministry of Sustainable Development of the Executive Branch of the State of Queretaro

Updated: February 9th, 2023.



## Directory

### Ministry of Sustainable Development of the Executive Branch of the State of Queretaro (SEDESU, by its Spanish acronym)

Blvd. Bernardo Quintana No. 204. Querétaro, Qro. C.P. 76050. Colonia Carretas.

T. (442) 211 6800

[www.queretaro.gob.mx/sedesu](http://www.queretaro.gob.mx/sedesu)

[sedesu@queretaro.gob.mx](mailto:sedesu@queretaro.gob.mx)

### Sub-Ministry of Economic Development

Directorate of Support of SMEs

Directorate of Business Development

Directorate of Regional Development

Directorate of Industrial Development

T. (442) 211 6814

### Sub-Ministry of the Environment

Directorate of Environmental Control

Directorate of Environmental Planning

Ecology and Climate Change Center

T. (442) 211 6801

### International Airport of Querétaro (AIQ, by its Spanish acronym)

Carretera Estatal 200 Qro-Tequisquiapan No. 22500 Colonia Galeras. Colón, Qro. C.P. 76270.

T. (442) 192 5500

## Editorial

### Ministry of Sustainable Development

Ing. Marco Antonio Del Prete Tercero

### Sub-Ministry of Economic Development

Mtro. Genaro Montes Díaz

### Sub-Ministry of the Environment

Ing. Ricardo Javier Torres Hernández

### Technical Secretary

Lic. María Cecilia Bustamante Mier y Terán

### Coordination and Content Creation

Lic. Lilia J. Martínez Sobrino

Lic. Paulina Hernández Mendoza

### Proofreading

Jessica Reyes Gómez

### Translation

Guillermo Barrera Gómez

### Art Direction - Layout and Design

Héctor Muñoz Huerta

Fernanda García Vergara

# Competitive Querétaro

ECONOMIC YEARBOOK 2024



PODER EJECUTIVO DEL ESTADO DE  
QUERÉTARO



QUERÉTARO  
GOBIERNO DEL ESTADO  
*Juntos, Adelante.*

"This program is public, independent of any political party.  
Its use for purposes other than those established in the  
program is prohibited."