DATA SNAPSHOT

The Baja Economy by the Numbers

Why Baja California, Mexico's northern border state, runs on advanced manufacturing, trade, and export agriculture, not on cheap tourism, and where the wine, cruise, medical, and motorsports economies actually fit.

Figures reflect the most recent complete data available, generally full-year 2023 or 2024. Peso figures are converted at roughly 18 to 19 pesos per US dollar; the 2026 racing season is still under way.

> **First, a clarification.** This brief covers **Baja California**, the state directly below San Diego, and its seven municipalities: Tijuana, Mexicali, Ensenada, Tecate, Playas de Rosarito, San Felipe, and San Quintín. It is **not** Baja California Sur / Los Cabos, a separate state at the southern tip of the peninsula with a completely different, tourism-led economy.

~$70B
State economy (2023 GDP), among Mexico's largest, ~3.9% of national output

~600
Export-manufacturing plants in Tijuana; Baja leads Mexico in IMMEX plants

435K
Containers (TEUs) through the Port of Ensenada in 2024, 5th in Mexico

$1.25B
Annual farm output, exported to markets worldwide year-round

THE THREE MAJOR CITIES · 75%+ OF THE POPULATION

Tijuana
~1.9M people
Manufacturing and nearshoring engine; ~600 export-manufacturing plants

Mexicali
~1.0M people
State capital; aerospace and the irrigated Mexicali Valley farm belt

Ensenada
~444K people
Deep-water port, wine country, and specialized high-tech manufacturing

THE FOUR SMALLER MUNICIPALITIES

- **Tecate** — border town known for brewing and light manufacturing
- **Playas de Rosarito** — Pacific beach and expat tourism, home to Baja Studios
- **San Felipe** — Sea of Cortez snowbird town and host of the San Felipe 250
- **San Quintín** — the state's export-agriculture heartland (berries, tomatoes)

The backbone: advanced manufacturing

Industry is the load-bearing wall of the state economy: the secondary sector is about 45% of GDP, and it is moving up the value chain.

- **Baja California leads Mexico in export-manufacturing (IMMEX) plants,** with roughly 17.5% of the national total. Tijuana alone had about 600 establishments in late 2024, the most of any Mexican city, concentrated in electronics, medical devices, and aerospace.
- **The sector employs roughly one in five workers in the state** and about 40% of those registered with social security (IMSS), making it the single largest source of formal jobs.
- **Manufacturing has drawn about $16.5 billion in foreign direct investment over the past decade,** with nearshoring still driving expansions by companies already established here.
- **Mexicali, the capital, anchors aerospace and farming,** with long-established primes such as Honeywell and Collins Aerospace alongside the Mexicali Valley. Ensenada is the high-tech outlier: small by plant count but technical (Lowrance marine electronics, aerospace and medical parts), and home to CICESE, a top national research center.

- **The economy is deeply binational.** About 70,000 residents statewide commute to jobs in Southern California, earning US-dollar wages and spending much of it back home. That figure peaked near 87,000 in early 2024 before falling roughly 20% by 2025 (INEGI).
- **Growth has cooled.** The state economy grew 3.5% in 2023 but was essentially flat in 2024, as US tariff pressure and a softer auto sector weighed on exports.

Agriculture: a $1.25 billion export engine

One of the state's biggest and least-visible sectors, exporting fresh produce to markets worldwide year-round.

- **Farm output was about 23.7 billion pesos (roughly $1.25 billion) in 2024 and supports 120,000+ direct jobs,** per SIAP and the state. Value dipped about 12% that year, but the sector remains a pillar.
- **Two very different regions.** The Mexicali Valley produces the volume, over 90% of the state's tonnage, mostly alfalfa, wheat, and cotton on Colorado River irrigation. The Pacific coast (Ensenada and San Quintín) produces the value, led by export berries and vegetables.
- **Baja California is Mexico's second-largest strawberry producer,** and the coastal berry-and-vegetable belt ships strawberries, blueberries, tomatoes, and more to export markets worldwide through Pacific ports like Ensenada.

The gateway: Port of Ensenada

The only deep-water port on the entire Baja peninsula, and the reason the supply chain works.

- **434,765 containers (TEUs) and 3.99 million tons of cargo in 2024** (ASIPONA), the 5th-largest container port in Mexico and the first on the Mexican Pacific.
- **Speed is the advantage:** trucking from Ensenada to Tijuana is usually same-day, versus 2 to 3 days from Los Angeles / Long Beach. For plants and farms shipping to the US and beyond, it is the fast door.
- **A relief valve for congested LA / Long Beach,** 110 km from the border across three terminals (Ensenada, El Sauzal, Costa Azul), with trans-Pacific services to Asia and ongoing capacity upgrades.

Tourism, moving upmarket

The old day-tripper economy is giving way to higher-value visitors.

- **Cruise (Ensenada): 949,321 passengers in 2024, and already 963,647 through Q3 2025, up about 36%.** Ensenada is Mexico's 3rd-busiest cruise port, with a Carnival-backed cruise village in development.
- **Wine (Valle de Guadalupe): about $180 million a year in wine-tourism impact** (roughly 3.5 billion pesos, SECTUR), with 150+ wineries and 10,500+ jobs. Baja produces around 70% of all Mexican wine and draws 800,000 to 1 million visitors a year.
- **Fine dining is now a destination in itself.** Baja entered the Michelin Guide in 2024; the Valle and Ensenada hold Michelin stars (Animalón), a Green Star (Lunario), and a World's 50 Best restaurant (Fauna), built on the homegrown "Baja Med" movement.
- **Boutique lodging followed the food.** Wine-country hotels such as Banyan Tree Veya, El Cielo, and Bruma run roughly $300 to $600+ a night, a high-value market that barely existed a decade ago.
- **Medical tourism and a large expat community.** Nearly 59% of the state's foreign visitors come from the US, feeding a year-round market for medical services, real estate, and retirement living along the coast.

Motorsports: the SCORE World Desert Championship

Baja California hosts the premier off-road racing series. In 2026, three of its four rounds run in the state, and for the first time ever, the Baja 1000 heads south.

San Felipe 250	Baja 500	Baja 400	Baja 1000
MARCH · SAN FELIPE	JUNE · ENSENADA	SEPTEMBER · ENSENADA	NOVEMBER · LOS CABOS, BCS

- **2026 is a split year.** The San Felipe 250, Baja 500, and Baja 400 all run in Baja California, but the 59th Baja 1000 (Nov 9-15) starts and finishes in Los Cabos, the first time in history the race runs entirely in Baja California Sur.
- **Impact runs roughly $10 to $12 million per flagship race** (local tourism-office estimates). Its real value, though, is global brand exposure and filling hotels on specific dates, not structural GDP: the full racing calendar is a fraction of a percent of the state economy.

The contrast everyone confuses

- **Baja California Sur / Los Cabos** is a tourism-led economy and was among Mexico's fastest-growing states in 2025, with a luxury resort market and the highest average hotel rates in the country. The north is the opposite: manufacturing and agriculture first, with tourism moving upmarket.

THE ONE-LINE TAKEAWAY

Northern Baja is a roughly $70 billion, manufacturing-driven economy, backed by $1.25 billion in export agriculture and a fast-maturing, higher-value tourism layer. Cruise, wine, and dining each out-earn the racing calendar many times over, but SCORE remains the peninsula's most recognizable global marketing asset.

Methodology & sources. Compiled from primary sources: INEGI (state GDP / PIBE 2023-2024, ENOE labor and cross-border-commuter data, IMMEX manufacturing statistics), SIAP-SADER (agricultural production value), ASIPONA Ensenada (port and cruise throughput), SECTUR and the Baja California tourism authorities (wine and visitor figures), the MICHELIN Guide, and SCORE International. Official GDP, labor, manufacturing, farm-value, and port figures are drawn directly from these agencies; wine-tourism, cruise-revenue, and racing-impact figures include tourism-office estimates and are directional. Dollar conversions use roughly 18 to 19 pesos per US dollar; state GDP is 2023 nominal, the latest full year, and grew 3.5% in 2023 before flattening in 2024.