MUNICIPAL GEOANALYSIS

Morelia

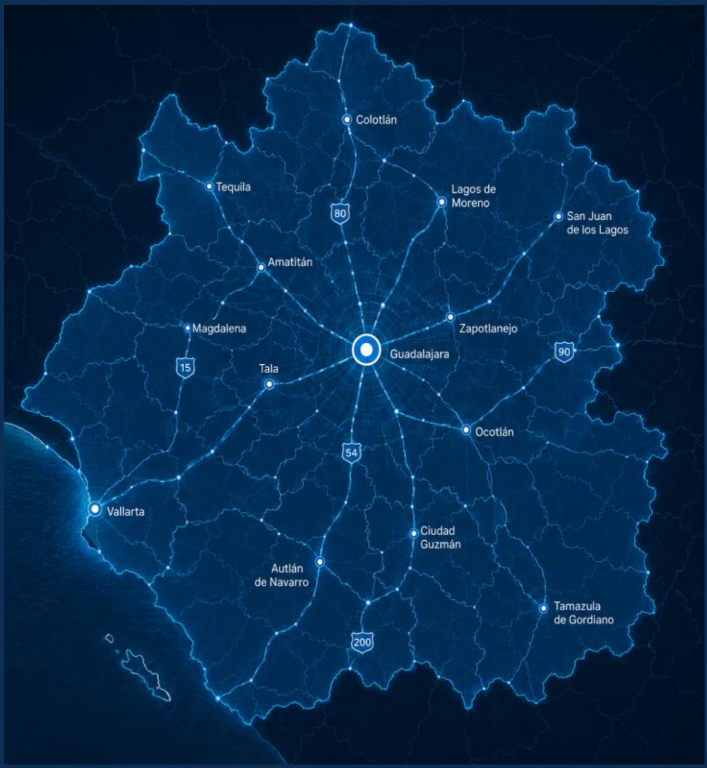
Michoacán

Report generated on August 25, 2026

DEMOGRAPHIC, ECONOMIC AND PRODUCTIVE PROFILE FOR INVESTMENT DECISIONS

Understand the territory. Detect its productive vocation. Find the opportunity.

100 KILOMETERS RADIUS



POPULATION	ECONOMIC & COMMERCIAL ACTIVITY	CLIMATE	AGRICULTURE & LIVESTOCK	CRIME
3,584,675 RESIDENTS	**995,354** JOBS	**19.97°C** AVG. ANNUAL TEMP.	**747,458** FARMLAND HECTARES	**47,512** RECORDED CRIMES
70.3% SEL D, E y NA	**495,499** CAI	**Mild semi-humid** climate type	**$45,038.2M** production value	**4.6** robbery at business

KEY FINDINGS

A region anchored in Morelia that produces 37.4% of Mexico's avocado and 21.6% of its strawberries, with a formal market that's dense in daily basics and nearly empty in leisure and specialty retail.

The farmland is already world-class. The question is how much of that value stays here.

TECHNICAL FACT SHEET

Main municipality	Morelia
Total municipalities in area	78
Dominant SEL	D, E and NA (70.3%)
Economic units	208,949
Sources	INEGI 2020-2024 + SMN 2024 + SNSP 2025
Report date	August 25, 2026

01 · INTRODUCTION

What is municipal geoanalysis and why does this report reduce your investment risk?

This report presents a geostatistical analysis of the area defined by a 100-kilometer radius around the point 19.7262, -101.1868, centered on the municipality of Morelia, Michoacán. The area spans 78 municipalities and totals 3,584,675 residents.

The data comes from official sources: INEGI (2020 Population and Housing Census, Economic Census, Agricultural Census, and 2023 Vehicle Registry), Mexico's National Meteorological Service, the Executive Secretariat of the National Public Security System, and the MktCompass statistical model.

Geomarketing means using territorial data to decide where and to whom to sell. Instead of guessing, it measures: how many people live in the area, what they can spend, what gets produced, which brands already operate here, and which environmental conditions raise or lower the cost of doing business.

The analysis answers three fundamental questions:

- Who lives and works in this region, and what is their purchasing power?
- What is the region's economic structure: formal employment, livestock and agriculture?
- Which environmental conditions (climate, crime, mobility) affect the viability of opening or expanding a business?

HARD DATA	Official censuses and records from INEGI and federal agencies, with national coverage and rigorous methodology.
PRECISION	Exact geographic delimitation of the analyzed area, with national decile benchmarks for every indicator.
INSIGHTS	Actionable findings on demographics, economic structure, farm output, climate, crime and mobility.
ACTION	Business opportunities derived from the region's real profile, with no invented data.

> *With the method clear and the sources identified, we turn to who lives in this region — because the first step to spotting an opportunity is understanding who you will sell to.*

02 · SOCIOECONOMIC PROFILE OF THE POPULATION

Who lives here, how many are they, and how high is their purchasing power?

Socioeconomic Level (SEL) groups households by spending capacity, education and access to services. Mexico uses levels A/B (high), C+ (upper-middle), C (middle), C– (lower-middle), D (working class) and E (very low). SEL is the first filter for any business: it determines which prices, products and strategies fit the area.

Socioeconomic distribution of the population

SEL	Population	% of total	Analysis vs. national average
Population SEL AB and C+ (high / upper-middle)	49,733	1.4%	Very High
Population SEL C and C- (middle and lower-middle)	1,014,863	28.3%	High
Population SEL D, E and NA (low, very low and unidentified)	2,520,075	70.3%	Low
Total population	3,584,671	—	—

INEGI withholds part of the data for statistical confidentiality, so the rows in this table do not add up to the category total and the percentages do not add up to 100%. Classified data covers 100% of the area's population (3,584,671 of 3,584,675). The gap is neither reconstructed nor estimated.

The area is dominated by NSE levels D, E and NA, which together account for 2,520,075 people (70.3%, rated low against the national average): a mass market where price and usefulness matter more than brand. What changes the picture is the C and C– bracket, with 1,014,863 people (28.3%, rated high): this is a genuine middle-class base, not a rounding error, and in raw numbers it exceeds the population of many Mexican state capitals. NSE ABC+ is just 49,733 people (1.4%), but rated very high against the national average: a small niche by volume that can't carry a #1 recommendation on its own, but does justify a premium line within a broader format.

Population by age group

Age group	Population	% of total	Analysis vs. national average
0 to 4 years	309,662	8.6%	Average
5 to 9 years	318,995	8.9%	Low
10 to 14 years	315,546	8.8%	Low
15 to 19 years	307,208	8.6%	Average
20 to 24 years	297,565	8.3%	High
25 to 29 years	277,138	7.7%	High
30 to 39 years	501,295	14.0%	High
40 to 49 years	438,595	12.2%	Average
50 to 59 years	341,213	9.5%	Average

Age group	Population	% of total	Analysis vs. national average
60 to 69 years	247,402	6.9%	Average
70 and older	230,056	6.4%	Average
Total population	3,584,675	—	—

INEGI withholds part of the data for statistical confidentiality, so the rows in this table do not add up to the category total and the percentages do not add up to 100%. Classified data covers 100% of the area's population (3,584,675 of 3,584,675). The gap is neither reconstructed nor estimated.

The age structure favors the 20-to-39 bracket, all three groups above the national average: 20 to 24 with 297,565 people (8.3%), 25 to 29 with 277,138 (7.7%), and 30 to 39 with 501,295 (14.0%) — 1,075,998 people in total. This is a population in household-formation years with active consumption habits. The 5-to-14 groups sit below the national average, a sign of a population structure that has already begun to mature without yet being an older one.

Key demographic data

Indicator	Value	% / Reference	Analysis
Total population 2020	3,584,675	100.0%	—
Total population 2010	3,301,655	Growth: +8.6%	Growing
Female population	1,853,051	51.7%	—
Male population	1,731,624	48.3%	—
EAP (economically active population)	1,712,680	47.8%	Very Low
Population with social security	1,150,249	32.1%	Very Low
Population without social security	2,426,944	67.7%	Very Low
Total dwellings	1,316,607	—	—
Occupied dwellings	961,557	73.0%	—

Household goods (penetration and decile)

Good or service	Households	% penetration	Decile	Analysis
Electricity	953,947	99.2%	9	Average
Electricity, piped water and sewerage	897,330	93.3%	7	Low
Refrigerator	854,505	88.9%	8	Average
Television set	893,702	92.9%	9	Average
Cell phone	827,553	86.1%	8	Average
Home internet	395,680	41.1%	8	Average
Car or pickup truck	453,933	47.2%	8	Average

Good or service	Households	% penetration	Decile	Analysis
Computer, laptop or tablet	281,105	29.2%	9	Average
Pay TV service	429,772	44.7%	7	Average
Motorcycle or scooter	159,774	16.6%	8	Very High

The decile shows the area's position against all other municipalities in the country: 1 is the lowest and 10 the highest.

The household-goods profile confirms an area where the motorcycle matters more than in the rest of the country: 16.6% of households own a motorcycle or moped, rated very high, versus 47.2% that own a car or truck, rated average. Access to piped municipal water is the sharpest gap: only 72.4% of households have it, rated very low, well behind sewage service (95.2%) or all three basic services combined (93.3%). Any water-intensive business needs to verify supply before committing.

Key socioeconomic insights

01

THE MIDDLE-INCOME BRACKET IS BIGGER THAN IT LOOKS

The C and C– bracket adds up to 1,014,863 people, rated high against the national average. It isn't the area's dominant NSE, but in raw numbers it outsizes the population of many state capitals: it's the real base for a mid-price format.

02

THE MOTORCYCLE IS AN ACCESS CHANNEL, NOT JUST THE CAR

16.6% of households own a motorcycle, rated very high, versus 47.2% with a car. A business that only designs its access for cars leaves out a larger share of customers than it would elsewhere in the country.

03

WATER IS THE MISSING SERVICE, NOT ELECTRICITY

72.4% of households have piped municipal water (rated very low) versus 99.2% with electricity. Any water-intensive business needs to verify supply before signing a lease.

04

A YOUNG-ADULT POPULATION, DEMAND FOR HOUSEHOLD FORMATION

The 20-to-39 groups add up to 1,075,998 people, all rated high against the national average. That's demand for household formation: furniture, appliances, consumer credit, and childcare all have a structural base here.

05

A SMALL BUT REAL ABC+ NICHE

NSE ABC+ totals only 49,733 people (1.4%), but is rated very high against the national average. It doesn't support a destination business on its own, but it does justify a premium line inside a mid-price format.

> *Now that we know the residents, we need to understand who works here — because the region's employees are also daily consumers who feed commercial demand.*

03 · ECONOMIC PROFILE: JOBS AND BUSINESS ESTABLISHMENTS

How many people work in this region and how formal is the business ecosystem?

The economic profile reveals the region's formal productive structure. Jobs determine the purchasing power of those who work here; business establishments show how formalized the local business ecosystem is.

Jobs by sector

Sector	Jobs	% of total	Analysis vs. average
Agriculture, mining, fishing and livestock	10,021	1.0%	High
Industry and energy	137,241	13.8%	Low
Trade	387,083	38.9%	Average
Services	452,957	45.5%	Low
Technology and communications	8,052	0.8%	Average
Total	995,354	100.0%	—

Jobs by SEL

Employee SEL	Estimated jobs	% of total	Analysis
Jobs in SEL ABC+	155,084	15.6%	Low
Jobs in SEL C and C-	523,144	52.6%	Low
Jobs in SEL D, E and NA	317,126	31.9%	Very Low
Total	995,354	—	—

Commercial Activity Index (CAI)

Commercial Activity Index: 495,499 | CAI/Jobs: Very High | CAI/Population: Average

The CAI is not evaluated in absolute terms, nor compared across regions of different size: it is read through the two relative indicators published by the source. The CAI represents a Very High level of total employment (49.8%) and a Average level of the population (13.8%).

The two IDC readings point in different directions, which is exactly why they should be read together. Against employment, commercial activity is very high: 49.8% of the area's jobs are tied to trades that generate shopper traffic. Against population, it's average (13.8%): across an area of 3,584,675 residents and 78 municipalities, that pattern is what's expected at this scale, not a sign of weakness. The reading is the same one that shows up in any large radius: dense commercial cores surrounded by municipalities with less formal supply.

Business establishments by sector

Sector	Establishments	% of total	Analysis
Agriculture, mining, fishing and livestock	689	0.3%	Average
Industry and energy	27,416	13.1%	Average
Trade	102,725	49.2%	Low
Services	77,106	36.9%	Low
Technology and communications	1,013	0.5%	Low
Total	208,949	100.0%	—

Business establishments by size

Size	Count	% of total	Analysis	Typical business
Micro (1 to 5 employees)	190,661	91.2%	Low	Corner stores, small eateries, workshops
Small (6 to 25)	15,877	7.6%	Low	Restaurants, pharmacies, schools
Medium (26 to 100)	1,835	0.9%	Low	Regional chains, clinics
Large (more than 100)	576	0.3%	Low	Hospitals, national chains
Total	208,949	100.0%	—	—

Key economic insights

01

THIS IS A SERVICES-AND-RETAIL ECONOMY, NOT A FARM ECONOMY

The services sector holds 45.5% of employment and retail 38.9%; the primary sector barely 1.0%. Farmland generates the export value but employs few people: day-to-day demand is driven by retail and services workers.

02

PRIMARY-SECTOR EMPLOYMENT IS VERY HIGH FOR THE COUNTRY, EVEN THOUGH IT LOOKS SMALL

Even though it's only 1.0% of local employment, that share is rated high against the national average. Farming carries more weight here than in most of the country, even with a small formal employment base.

03

INFORMAL COMPETITION, FORMAL ADVANTAGE

91.2% of economic units are microbusinesses with 1 to 5 employees. A formal business with real processes, invoicing, and a warranty competes against corner stores: differentiating on service is viable from day one.

04

A CRITICAL MASS OF WORKING CUSTOMERS

995,354 formal jobs in the area mean a meal out, a coffee, and a commute every day for a broad base of workers. Quick-service formats placed along employment corridors have guaranteed weekday traffic.

> *Residents plus employees are the region's real market. Now let us see which large brands already operate here — to understand who leads the formal market and which gaps remain open.*

04 · COMMERCIAL ACTIVITY AND BRAND PRESENCE

Which large brands already operate in the region, how many branches do they have, and how many residents does each one serve?

Commercial Activity Index: 495,499 | CAI/Jobs: Very High | CAI/Population: Average

The data in this section is the aggregate of the municipalities that make up the analyzed area. Decile comparisons against individual municipalities nationwide may understate the area's real competitiveness.

The Brand Presence and Coverage Report identifies the chains present in the area and measures them along three distinct dimensions worth keeping apart. The first is geographic coverage: in how many of the area's 78 municipalities the brand is present. The second is physical density: how many branches it actually has. The third is population load: how many residents each branch serves on average.

Commercial brand presence in the region

Sector: Cafeterías

Category	Brand	Branches	Municipalities	Coverage %	Analysis	Residents per branch
Cafetería de cadena	Black Coffee	3	3	3.8%	Very Low	1,194,892
Cafetería de cadena	Café Europa	11	1	1.3%	Very Low	325,880
Cafetería de cadena	Café La Cabaña	1	1	1.3%	Very Low	3,584,675
Cafetería de cadena	Caffeto	3	3	3.8%	Very Low	1,194,892
Cafetería de cadena	Diletto	1	1	1.3%	Very Low	3,584,675
Cafetería de cadena	Italian Coffee	6	3	3.8%	Very Low	597,446
Cafetería de cadena	Punta del Cielo	1	1	1.3%	Very Low	3,584,675
Cafetería de cadena	Starbucks	13	4	5.1%	Very Low	275,744
Total Cafetería de cadena	—	**39**	—	—	—	**91,915**
Total Cafeterías	—	**39**	—	—	—	**91,915**

Sector: Comercio

Category	Brand	Branches	Municipalities	Coverage %	Analysis	Residents per branch
Supermercados	Bodega Aurrera	24	13	16.7%	Very Low	149,361
Supermercados	Bodega Aurrera Express	26	5	6.4%	Very Low	137,872
Supermercados	Chedraui	5	3	3.8%	Very Low	716,935
Supermercados	Costco	2	2	2.6%	Very Low	1,792,338
Supermercados	Mi Bodega Aurrera	18	17	21.8%	Low	199,149

Category	Brand	Branches	Municipalities	Coverage %	Analysis	Residents per branch
Supermercados	Sams Club	5	4	5.1%	Very Low	716,935
Supermercados	Soriana	22	12	15.4%	Very Low	162,940
Supermercados	Waldos	16	12	15.4%	Very Low	224,042
Supermercados	Walmart	20	7	9.0%	Very Low	179,234
Total Supermercados	—	**138**	—	—	—	**25,976**
Tiendas de conveniencia	Circle K	8	3	3.8%	Very Low	448,084
Tiendas de conveniencia	Del Río	1	1	1.3%	Very Low	3,584,675
Tiendas de conveniencia	Extra	22	4	5.1%	Very Low	162,940
Tiendas de conveniencia	Kiosko	7	3	3.8%	Very Low	512,096
Tiendas de conveniencia	Modelorama	286	58	74.4%	High	12,534
Tiendas de conveniencia	Neto	8	7	9.0%	Very Low	448,084
Tiendas de conveniencia	Oxxo	564	46	59.0%	Average	6,356
Tiendas de conveniencia	Super Six	8	5	6.4%	Very Low	448,084
Tiendas de conveniencia	Tiendas 3B	86	34	43.6%	Average	41,682
Total Tiendas de conveniencia	—	**990**	—	—	—	**3,621**
Tiendas de vinos y licores	La Europea	2	2	2.6%	Very Low	1,792,338
Tiendas de vinos y licores	La Vinata	3	2	2.6%	Very Low	1,194,892
Tiendas de vinos y licores	Tecate Six	127	16	20.5%	Low	28,226
Total Tiendas de vinos y licores	—	**132**	—	—	—	**27,157**
Tiendas departamentales	C&A	4	3	3.8%	Very Low	896,169
Tiendas departamentales	Coppel	71	26	33.3%	Low	50,488
Tiendas departamentales	Liverpool	5	3	3.8%	Very Low	716,935
Tiendas departamentales	Sanborns	4	2	2.6%	Very Low	896,169
Tiendas departamentales	Sears	4	2	2.6%	Very Low	896,169
Tiendas departamentales	Suburbia	8	6	7.7%	Very Low	448,084
Total Tiendas departamentales	—	**96**	—	—	—	**37,340**

Category	Brand	Branches	Municipalities	Coverage %	Analysis	Residents per branch
Total Comercio	**—**	**1,356**	**—**	**—**	**—**	**2,644**

Sector: Entretenimiento y cultura

Category	Brand	Branches	Municipalities	Coverage %	Analysis	Residents per branch
Cines	Cinemex	2	2	2.6%	Very Low	1,792,338
Cines	Cinepolis	17	9	11.5%	Very Low	210,863
Total Cines	**—**	**19**	**—**	**—**	**—**	**188,667**
Total Entretenimiento y cultura	**—**	**19**	**—**	**—**	**—**	**188,667**

Sector: Farmacias

Category	Brand	Branches	Municipalities	Coverage %	Analysis	Residents per branch
Cadena F. Nacional	Benavides	11	7	9.0%	Very Low	325,880
Cadena F. Nacional	Delta	2	2	2.6%	Very Low	1,792,338
Cadena F. Nacional	F. ABC	2	2	2.6%	Very Low	1,792,338
Cadena F. Nacional	F. Ahuacatlán	1	1	1.3%	Very Low	3,584,675
Cadena F. Nacional	F. Calderón	2	2	2.6%	Very Low	1,792,338
Cadena F. Nacional	F. de GI	50	17	21.8%	Low	71,694
Cadena F. Nacional	F. del Ahorro	80	18	23.1%	Low	44,808
Cadena F. Nacional	F. dr Símil	321	60	76.9%	High	11,167
Cadena F. Nacional	F. Guadalajara	109	23	29.5%	Low	32,887
Cadena F. Nacional	F. Roma	1	1	1.3%	Very Low	3,584,675
Cadena F. Nacional	F. Yza	3	2	2.6%	Very Low	1,194,892
Cadena F. Nacional	Farmapronto	54	28	35.9%	Low	66,383
Cadena F. Nacional	La Paz	9	4	5.1%	Very Low	398,297
Cadena F. Nacional	Medisim	1	1	1.3%	Very Low	3,584,675
Total Cadena F. Nacional	**—**	**646**	**—**	**—**	**—**	**5,549**
Total Farmacias	**—**	**646**	**—**	**—**	**—**	**5,549**

Sector: Restaurantes y bares

Category	Brand	Branches	Municipalities	Coverage %	Analysis	Residents per branch
Alitas	Las Alitas	2	2	2.6%	Very Low	1,792,338
Alitas	Vancouver Wings	2	1	1.3%	Very Low	1,792,338
Alitas	Wings Army	2	2	2.6%	Very Low	1,792,338
Total Alitas	**—**	**6**	**—**	**—**	**—**	**597,446**
Cadenas otras	Applebees	1	1	1.3%	Very Low	3,584,675
Cadenas otras	Bisquets de Obregón	2	1	1.3%	Very Low	1,792,338
Cadenas otras	Chilis	4	3	3.8%	Very Low	896,169
Cadenas otras	Dennys	1	1	1.3%	Very Low	3,584,675
Cadenas otras	El Portón	6	2	2.6%	Very Low	597,446
Cadenas otras	Ihop	2	1	1.3%	Very Low	1,792,338
Cadenas otras	María Bonita	9	6	7.7%	Very Low	398,297
Cadenas otras	Subway	13	6	7.7%	Very Low	275,744
Cadenas otras	Toks	3	2	2.6%	Very Low	1,194,892
Cadenas otras	Vips	6	3	3.8%	Very Low	597,446
Total Cadenas otras	**—**	**47**	**—**	**—**	**—**	**76,270**
Hamburguesas	Burger King	2	1	1.3%	Very Low	1,792,338
Hamburguesas	Carls Junior	3	2	2.6%	Very Low	1,194,892
Hamburguesas	Cuarto de Kilo	2	2	2.6%	Very Low	1,792,338
Hamburguesas	McDonalds	1	1	1.3%	Very Low	3,584,675
Total Hamburguesas	**—**	**8**	**—**	**—**	**—**	**448,084**
Pizzas e italiana	Dominos Pizza	27	14	17.9%	Very Low	132,766
Pizzas e italiana	Ginos Pizza	1	1	1.3%	Very Low	3,584,675
Pizzas e italiana	Little Caesars	9	4	5.1%	Very Low	398,297
Pizzas e italiana	Pizza Hut	4	3	3.8%	Very Low	896,169
Total Pizzas e italiana	**—**	**41**	**—**	**—**	**—**	**87,431**
Pollos	El Pollo Feliz	40	17	21.8%	Low	89,617
Pollos	KFC	9	4	5.1%	Very Low	398,297
Total Pollos	**—**	**49**	**—**	**—**	**—**	**73,157**
Total Restaurantes y bares	**—**	**151**	**—**	**—**	**—**	**23,740**

Sector: Ropa y calzado

Category	Brand	Branches	Municipalities	Coverage %	Analysis	Residents per branch
Ropa de marca	Aldo Conti	3	2	2.6%	Very Low	1,194,892

Category	Brand	Branches	Municipalities	Coverage %	Analysis	Residents per branch
Ropa de marca	Andre Badi	1	1	1.3%	Very Low	3,584,675
Ropa de marca	Aura	1	1	1.3%	Very Low	3,584,675
Ropa de marca	Benetton	1	1	1.3%	Very Low	3,584,675
Ropa de marca	Bershka	2	2	2.6%	Very Low	1,792,338
Ropa de marca	Cuidado con el perro	2	2	2.6%	Very Low	1,792,338
Ropa de marca	Forever 21	2	2	2.6%	Very Low	1,792,338
Ropa de marca	Julio	3	3	3.8%	Very Low	1,194,892
Ropa de marca	Lacoste	1	1	1.3%	Very Low	3,584,675
Ropa de marca	Levis	6	5	6.4%	Very Low	597,446
Ropa de marca	Liz Minelli	5	2	2.6%	Very Low	716,935
Ropa de marca	LOB	4	4	5.1%	Very Low	896,169
Ropa de marca	Massimo Dutti	1	1	1.3%	Very Low	3,584,675
Ropa de marca	Milano	17	13	16.7%	Very Low	210,863
Ropa de marca	Scappino	1	1	1.3%	Very Low	3,584,675
Ropa de marca	Sfera	2	2	2.6%	Very Low	1,792,338
Ropa de marca	Stop	1	1	1.3%	Very Low	3,584,675
Ropa de marca	Studio F	1	1	1.3%	Very Low	3,584,675
Ropa de marca	Todo Moda	15	7	9.0%	Very Low	238,978
Ropa de marca	Tommy Hilfiger	2	2	2.6%	Very Low	1,792,338
Ropa de marca	Vittorio Forti	2	2	2.6%	Very Low	1,792,338
Ropa de marca	Zara	1	1	1.3%	Very Low	3,584,675
Ropa de marca	Zoe	1	1	1.3%	Very Low	3,584,675
Total Ropa de marca	—	**75**	—	—	—	**47,796**
Tienda de lencería	Ilusion	11	8	10.3%	Very Low	325,880
Tienda de lencería	Vicky Form	2	2	2.6%	Very Low	1,792,338
Total Tienda de lencería	—	**13**	—	—	—	**275,744**
Total Ropa y calzado	—	**88**	—	—	—	**40,735**

Sector: Servicios comerciales

Category	Brand	Branches	Municipalities	Coverage %	Analysis	Residents per branch
Gimnasios	Any Time Fitness	2	1	1.3%	Very Low	1,792,338
Gimnasios	Be Fit	3	2	2.6%	Very Low	1,194,892
Gimnasios	Evolution	7	7	9.0%	Very Low	512,096
Gimnasios	Family Fitness	1	1	1.3%	Very Low	3,584,675

Category	Brand	Branches	Municipalities	Coverage %	Analysis	Residents per branch
Gimnasios	Fitness center	90	26	33.3%	Low	39,830
Gimnasios	Master Gym	5	5	6.4%	Very Low	716,935
Gimnasios	Power Gym	2	2	2.6%	Very Low	1,792,338
Gimnasios	SmartFit	8	3	3.8%	Very Low	448,084
Gimnasios	Ultragym	1	1	1.3%	Very Low	3,584,675
Total Gimnasios	—	**119**	—	—	—	**30,123**
Total Servicios comerciales	—	**119**	—	—	—	**30,123**

Sector: Servicios financieros

Category	Brand	Branches	Municipalities	Coverage %	Analysis	Residents per branch
Bancos	Actinver	1	1	1.3%	Very Low	3,584,675
Bancos	Banca Afirme	26	5	6.4%	Very Low	137,872
Bancos	Banca Mifel	1	1	1.3%	Very Low	3,584,675
Bancos	Banco ABC	1	1	1.3%	Very Low	3,584,675
Bancos	Banco Azteca	103	43	55.1%	Average	34,803
Bancos	Banco Compartamos	15	11	14.1%	Very Low	238,978
Bancos	Banco del Bajio	43	12	15.4%	Very Low	83,365
Bancos	Banco Famsa	4	4	5.1%	Very Low	896,169
Bancos	Bancoppel	50	22	28.2%	Low	71,694
Bancos	Bankaool	1	1	1.3%	Very Low	3,584,675
Bancos	Banregio	5	2	2.6%	Very Low	716,935
Bancos	CI Banco	7	3	3.8%	Very Low	512,096
Bancos	Citibanamex	139	30	38.5%	Low	25,789
Bancos	HSBC	69	18	23.1%	Low	51,952
Bancos	Inbursa	24	4	5.1%	Very Low	149,361
Bancos	Multiva	5	2	2.6%	Very Low	716,935
Bancos	Otros bancos	7	4	5.1%	Very Low	512,096
Bancos	Santander	86	18	23.1%	Low	41,682
Bancos	Scotiabank	20	6	7.7%	Very Low	179,234
Total Bancos	—	**607**	—	—	—	**5,906**
Total Servicios financieros	—	**607**	—	—	—	**5,906**

Category	Brand	Branches	Municipalities	Coverage %	Analysis	Residents per branch
GRAND TOTAL	—	**3,025**	—	—	—	**1,185**

In total rows, the source's Municipalities column is an arithmetic sum that can exceed the area's 78 municipalities; that is why it is not shown: it does not represent unique municipalities with presence. The Branches and Residents per branch columns are valid and measure the commercial density of the whole group. Coverage and analysis do not apply to aggregates.

Summary: commercial density by category

Category	Branches	Residents per branch	Reading
Tiendas de conveniencia	990	3,621	Saturated
Cadena F. Nacional	646	5,549	Saturated
Bancos	607	5,906	Saturated
Supermercados	138	25,976	Saturated
Tiendas de vinos y licores	132	27,157	Saturated
Gimnasios	119	30,123	Covered
Tiendas departamentales	96	37,340	Covered
Ropa de marca	75	47,796	Covered
Pollos	49	73,157	Covered
Cadenas otras	47	76,270	Covered
Pizzas e italiana	41	87,431	Covered
Cafetería de cadena	39	91,915	Underserved
Cines	19	188,667	Underserved
Tienda de lencería	13	275,744	Underserved
Hamburguesas	8	448,084	Underserved
Alitas	6	597,446	Underserved

The reading compares categories against each other within this area, not against the country: the third of categories with the fewest residents per branch is marked saturated and the third with the most, underserved. It is a relative reading of the local formal market.

The three dimensions of the retail landscape tell different stories. In geographic coverage, no brand reaches all 78 municipalities in the area: even the widest-reaching ones, F. dr Símil and Modelorama, cover 76.9% and 74.4% of municipalities respectively, and they're the exception, not the rule. In physical density, the area has 3,025 formal storefronts across 127 brands, one for every 1,185 residents: this is a mature formal market, not an untapped one. In population load per storefront, the contrast is wide: Tiendas de conveniencia has one storefront for every 3,621 residents, the most saturated category, while Alitas has one for every 597,446, the most underserved. The formal market is saturated in daily basics and nearly empty in leisure and specialty formats.

Brand presence insights

01

DAILY BASICS DOMINATE

Tiendas de conveniencia (990 storefronts, 3,621 residents per storefront) and Cadena F. Nacional in the Farmacias sector (646 storefronts, 5,549 residents per storefront) lead the density of the formal market. Competing there requires logistics scale that an independent operator can't easily match.

02

REAL REGIONAL COVERAGE IS ONE CITY DEEP

McDonald's, Burger King, Applebee's, IHOP, and Dennys each appear in just 1 of the area's 78 municipalities (1.3% coverage), with 1 or 2 storefronts apiece. These recognized formats have barely left the main urban core.

03

THE DENSEST SECTOR AND THE SCARCEST ONE

The Comercio sector has 2,644 residents per storefront, the densest in the area; Entretenimiento y cultura has 188,667, the scarcest. The gap between what's already saturated and what's still empty runs 71 times over.

04

FORMAL LEISURE IS ABSENT

With one Alitas storefront for every 597,446 residents and only 6 storefronts across 5 of the 78 municipalities, entertainment and specialty dining are the clearest gap in the formal market.

05

THE MOST UNDERSERVED CATEGORY, PROPORTIONALLY

Alitas has one storefront for every 597,446 residents against 3,621 for Tiendas de conveniencia — a gap of nearly 165 times. Specialty destination formats are the most underserved formal segment in the area.

> *With the map of brands and commercial activity clear, we move to the region's productive core — the farm data that reveals the countryside's economic vocation and the value chains it generates.*

05 · PRODUCTIVE PROFILE: LIVESTOCK AND AGRICULTURE

What is the productive potential of farming in this region and which business opportunities does it create?

The data in this section is the aggregate of the municipalities that make up the analyzed area. Decile comparisons against individual municipalities nationwide may understate the area's real competitiveness.

5A · 2023 Livestock Census

Statistic	Annual production	Total inventory
Total production units	51,211	542,913
Head in open grazing	11,924	202,321
Head in controlled grazing	4,569	82,352
Head in confined feeding	6,538	93,451
Head in semi-confined feeding	3,455	86,145

Livestock farming in the area blends two models, not one. Of the head with an identified system, 202,321 are free-range, 82,352 are under controlled grazing, and 179,596 are stall-fed (93,451 fully stall-fed and 86,145 semi-stall-fed). It's a mixed system: the free-range share calls for fencing, herd health, and live-transport logistics; the stall-fed and semi-stall-fed share calls for balanced feed and technical management. The area's total livestock units show output of 51,211 and standing inventory of 542,913.

5B · 2023 Agricultural Census

Crop	Area (ha)	Volume (t)	Economic value (MXN)	Decile	Share of national output
Agave	1,014	76,684	$873,577,638	10	4.3%
Avocado	82,268	914,137	$19,268,618,742	10	37.4%
Green alfalfa	10,638	826,192	$631,513,626	10	3.9%
Green forage oats	24,295	313,388	$266,842,265	10	3.1%
Sugarcane	7,200	538,917	$452,710,154	9	0.98%
Onion	1,438	36,514	$222,993,382	10	2.5%
Green chili pepper	493	7,054	$80,124,776	9	0.29%
Strawberry	3,270	117,355	$2,026,574,570	10	21.6%
Lime	248	2,392	$16,581,810	9	0.08%
Corn (grain)	393,305	1,919,986	$10,370,465,278	10	7.0%
Mango	3,323	24,249	$154,871,196	10	1.1%
Potato	275	7,447	$56,160,349	8	0.38%
Papaya	186	6,255	$41,668,493	9	0.55%
Cucumber	1,771	65,462	$404,988,813	10	6.3%
Banana	64	1,050	$5,633,080	6	0.04%
Sorghum (grain)	82,943	446,198	$2,406,655,321	10	10.2%
Tomato	2,243	75,769	$714,348,409	10	2.3%
Wheat (grain)	48,544	306,366	$1,719,963,909	10	9.3%
Asparagus	1,335	12,876	$520,718,323	10	3.9%

Crop	Area (ha)	Volume (t)	Economic value (MXN)	Decile	Share of national output
Grape	2	16	$308,908	2	<0.01%
Dried chili pepper	105	103	$3,822,840	7	0.08%
Beans (dry)	9,390	12,281	$170,719,736	10	0.95%
Apple	153	1,161	$5,855,187	10	0.18%
Orange	39	346	$1,554,635	5	<0.01%
Other grains	42,620	219,885	$1,279,592,208	10	3.1%
Other fruits	16,291	219,876	$1,305,426,785	10	4.8%
Other berries	2,523	42,700	$850,442,794	10	11.3%
Other flowers	62	1,048,252	$35,802,866	10	2.7%
Other miscellaneous crops	11,423	315,863	$1,149,617,043	10	2.5%
Total	**747,458**	**7,558,745**	**$45,038,153,131**	**10**	**3.2%**

The 29 crops with actual output in the area are shown, in the source catalog's order; crops not grown here are omitted. Share of national output is the percentage the area's volume represents of the national total for that same crop. In the total row it represents the weight of the area's entire farm volume against the national farm volume of all crops.

Composite crops aggregate several species with different prices and uses: the relevant value chain depends on which one dominates locally.

This is the area's engine. Avocado accounts for 37.4% of national volume (decile 10, $19,268.6 million pesos), making the region the country's top producer of that crop. Strawberry adds 21.6% (decile 10, $2,026.6 million pesos), and grain sorghum (10.2%), wheat (9.3%), and grain corn (7.0%, with the area's largest volume at 1,919,986 tons) round out the group of decile-10 crops. The area's total agricultural volume equals 3.2% of the country's combined agricultural volume across all crops. With only 1.0% of local employment in the primary sector, the area produces at national scale on top of an employment structure that's already mostly urban.

Key farm insights

01

THE COUNTRY'S TOP AVOCADO PRODUCER

37.4% of national avocado volume, at decile 10 and worth $19,268.6 million pesos. Any packing, cold-chain, or export business has structural, not speculative, demand here.

02

CORN IS THE VOLUME, AVOCADO IS THE VALUE

1,919,986 tons of grain corn (7.0% of national volume) drive bulk collection and transport; avocado, at less than half that volume (914,137 tons), generates nearly 1.9 times the value. These are two businesses of very different scale on the same land.

03

STRAWBERRY BUILDS A SECOND EXPORT ENGINE

117,355 tons of strawberry, 21.6% of national volume at decile 10. Together with avocado, it defines a perishable-fruit export vocation that demands cold-chain logistics starting at the orchard.

04

MIXED LIVESTOCK: FIELD SUPPLIES AND TECHNICAL FEED, BOTH AT ONCE

202,321 free-range head coexist with 179,596 stall-fed head: this isn't one business, it's two distinct customers with different needs on the same land.

> *With the farm profile clear, we analyze the environmental conditions — climate, crime and vehicle fleet — that define the operating risks and the specific demands of any business in this region.*

06 · ENVIRONMENTAL CONDITIONS: CLIMATE, CRIME AND MOBILITY

How favorable is the external environment for operating a business in this region?

6A · Climate data (SMN, September 2023 to August 2024)

Climate statistic	Mean	Decile	Analysis
Mean annual temperature (°C)	19.97	3	Low
Mean minimum temperature (°C)	11.81	3	Low
Lowest recorded temperature (°C)	7.03	4	Low
Months with minimum ≤15 °C	8.04	7	High
Months with minimum ≤8 °C	3.57	6	Average
Mean maximum temperature (°C)	28.29	4	Low
Highest recorded temperature (°C)	34.41	4	Low
Months with maximum ≥30 °C	3.69	4	Low
Months with maximum ≥35 °C	1.56	3	Low
Months with moderate rainfall (>50 ml/m²)	4	6	Average
Months with extreme rainfall (>150 ml/m²)	1.81	3	Low
Mean monthly rainfall (ml/m²)	65.67	5	Average

The area includes 78 municipalities: climate data represents the average of their stations.

The area has a temperate highland climate, not a hot one: 20.0°C average annual temperature at decile 3 (low), 8 months a year with lows of 15°C or below (decile 7, high), and just a month and a half with highs of 35°C or above (decile 3, low). This is a climate that lowers the urgency of cooling for extreme heat, but it brings its own demand: warm, comfortable spaces for a large part of the year.

Climate insights

01

EIGHT MONTHS OF COOL WEATHER, NOT HEAT

With 8 months a year of lows at 15°C or below (decile 7, high), structural demand runs toward hot beverages, comfort food, and enclosed or covered spaces, not cold drinks year-round.

02

AIR CONDITIONING ISN'T A COST OF ENTRY

Just a month and a half with highs of 35°C or above (decile 3, low). Unlike hot regions of the country, the differentiator here is indoor thermal comfort in the cold season, not investment in industrial cooling.

03 **COVERED TERRACES, NOT OPEN-AIR ONES ALL YEAR**

With an average high of 28.3°C (decile 4, low) and frequent cold months, outdoor space performs better covered and with some heat source than left fully open.

04 **REGULAR RAINFALL, NO CLIMATE-DRIVEN WATER CONSTRAINT**

65.67 mm of average monthly rainfall (decile 5, average): climate isn't the limiting factor for water in the area; the water gap sits in household infrastructure (72.4% with piped water), not in rainfall.

05 **THE SAME CLIMATE THAT LIMITS HEAT SUSTAINS THE AREA'S FLAGSHIP CROPS**

Avocado and strawberry, the area's two crops with the highest national share, both need a temperate climate rather than extreme heat. The same climate that lowers demand for air conditioning is what makes the area's agro-industrial leadership possible.

6B · Crime 2025

The following analysis is presented strictly in commercial terms: it is not a judgment about the community, but a reading of the operating costs a business must budget for in this region.

Crimes against persons

Crime type	Total crimes	Rate	Decile	Analysis
Intentional injuries (per 100,000 inhabitants)	6,469	180.46	9	Very High
Intentional homicide (per 100,000 inhabitants)	827	23.07	7	High
Negligent homicide (per 100,000 inhabitants)	939	26.19	7	High
Rape (per 100,000 inhabitants)	476	13.28	5	Average
Sexual abuse (per 100,000 inhabitants)	832	23.21	5	Average
Other crimes against personal integrity (per 100,000 inhabitants)	4,993	139.29	5	Average
Street robbery (per 100,000 inhabitants)	422	11.77	5	Average
Negligent injuries (per 100,000 inhabitants)	656	18.3	4	Low
Kidnapping (per 100,000 inhabitants)	45	1.26	4	Low
Femicide (per 100,000 inhabitants)	18	0.5	2	Very Low

Crimes against businesses, homes and vehicles

Crime type	Total crimes	Rate	Decile	Analysis
Other thefts (per 100,000 inhabitants)	11,789	328.87	9	Very High
Other public property offenses (per 100,000 inhabitants)	12,415	346.34	9	Very High

Crime type	Total crimes	Rate	Decile	Analysis
Retail drug dealing (per 100,000 inhabitants)	2,151	60.01	8	High
Vehicle theft (per 100,000 registered vehicles)	3,210	207.97	7	High
Extortion (per 100,000 inhabitants)	337	9.4	6	Average
Business robbery (per 1,000 business establishments)	962	4.6	5	Average
Home burglary (per 10,000 dwellings)	945	7.18	5	Average
Auto parts theft (per 100,000 registered vehicles)	26	1.68	1	Very Low

A total of zero means no crimes of that type were reported in the period; it is not missing data.

The reading here is strictly operating cost. Intentional injuries (6,469 cases), other thefts (11,789), and damage to public property (12,415) all register at decile 9, rated very high: that's the cost of security, lighting, and protocols any business needs to budget for from month one. Small-scale drug dealing (2,151 cases, decile 8) and intentional and negligent homicide (827 and 939 cases, both decile 7) mostly affect the hours-of-operation decision: closing early cuts exposure but also sales, and that call should be made with numbers, not gut feeling. What stands out against all of this is that business robbery itself sits at just decile 5, rated average: the area's risk isn't that the counter gets hit directly, it's the general environment any business operates in.

6C · Vehicle fleet 2023

Composition of the local vehicle fleet

Vehicle type	Total	% of total
Cars for government use	2,760	0.2%
Cars for public transport use	14,682	1.0%
Private cars	741,084	48.0%
Passenger buses for government use	98	0.0%
Public passenger buses	938	0.1%
Private passenger buses	5,126	0.3%
Freight trucks for government use	4,876	0.3%
Public freight trucks	6,044	0.4%
Private freight trucks	478,515	31.0%
Motorcycles for government use	1,173	0.1%
Motorcycles for hire	N/A	0.0%
Private motorcycles	288,229	18.7%

Specific vehicle types are reported as descriptive data on the composition of the local fleet: the distribution by type is not meaningfully comparable across municipalities, because vehicles circulate in municipalities other than the tax address where they are registered.

Motorization indicators

Statistic	Total / Value	% of total	Analysis
Total registered vehicle fleet 2023	1,543,525	—	High
Vehicles per 1,000 inhabitants 2023	431	—	Very High
Decile of total vehicles (vs. municipalities nationwide)	10	—	—
Decile of vehicles per 1,000 inhabitants	8	—	—
Vehicle fleet 2022 / 2023 growth	1,431,327	7.8%	—

With 1,543,525 vehicles and 431 per every thousand residents (decile 8, very high), the area ranks among the most motorized in the country, and the fleet grew 7.8% from 2022 to 2023. The local fleet's composition is reported for description only: vehicles circulate in municipalities other than where they're registered, so its breakdown by type doesn't support comparison across municipalities.

Mobility insights

01

DECILE 10 IN TOTAL VEHICLE FLEET

1,543,525 registered vehicles: the area has more vehicles than almost any municipality in the country. Highway-corridor formats and drive-up service have a real base here.

02

431 VEHICLES PER THOUSAND RESIDENTS, BUT NOT ALL ARE CARS

At decile 8 and rated very high for vehicles per thousand residents, the area is heavily motorized. But only 47.2% of households own a car (decile 8, average) versus 16.6% with a motorcycle (decile 8, very high): designing access for cars alone leaves out a meaningful customer.

03

THE FLEET GREW 7.8% IN ONE YEAR

112,198 more vehicles between 2022 and 2023. Demand for service, parts, washing, and insurance for both cars and motorcycles is growing at the same pace: it's one of the few trades with demonstrably expanding demand.

04

A MOTORCYCLE SHOP, NOT JUST AN AUTO SHOP

288,229 private motorcycles are part of the area's vehicle fleet. A shop specialized in motorcycles taps a mobility channel that's larger here than typical for the country, with less formal competition than an auto shop faces.

05

HOME DELIVERY IS VIABLE WITHOUT OWNING A FLEET

With 1,543,525 vehicles between cars and motorcycles already on the road in the area, outsourcing home delivery of daily basics or high-value farm products is inexpensive: it doesn't require investing in a fleet.

> *With the full picture of farm output, climate, security and mobility, we reach the core of the report: the 10 strategic business recommendations.*

07 · STRATEGIC BUSINESS RECOMMENDATIONS

Which 10 businesses have the highest probability of success in this specific region?

Based on the comprehensive analysis of this region, we identify the 10 business categories with the highest probability of success, ordered from most to least viable. Every recommendation derives solely from the data in the previous sections.

01

Cold-chain packing for export avocado and strawberry

The area produces 37.4% of national avocado and 21.6% of national strawberry, both at decile 10 and both high-value perishables that need cold-chain logistics starting at the orchard. The differentiator is Morelia's link to Michoacán's avocado-growing belt.

SEL: B2B | Age: Growers | Gender: Mixed | Competition: LOW | Peak hours: Mon-Sat, harvest season

02

Value-added avocado processing (guacamole, frozen pulp, oil)

With just 1.0% of local employment in the primary sector but 37.4% of national avocado, the area produces export-grade raw material without transforming most of it locally. Every processed ton keeps a margin that today leaves the region untouched.

SEL: B2B | Age: Growers | Gender: Mixed | Competition: LOW | Peak hours: Mon-Fri, production shifts

03

Bulk grain collection and logistics (sorghum, wheat, corn)

Grain sorghum (10.2% of national volume), wheat (9.3%), and grain corn (7.0%, 1,919,986 tons), all three at decile 10, move a bulk volume that calls for transport and storage distinct from export fruit's cold chain.

SEL: B2B | Age: Growers | Gender: Mixed | Competition: LOW | Peak hours: Mon-Sat, harvest season

04

Motorcycle service and parts

16.6% of households own a motorcycle at decile 8, rated very high, and private motorcycles account for 288,229 units in the fleet. A shop specialized in motorcycles taps a mobility channel larger than typical for the country, with less formal competition than an auto shop.

SEL: C and D | Age: 20-45 | Gender: Mixed | Competition: MEDIUM | Peak hours: Mon-Sat 9:00 AM-7:00 PM

05

Covered restaurant or café built for thermal comfort

With just a month and a half of highs at 35°C or above (decile 3, low) but 8 months of lows at 15°C or below (decile 7, high), demand isn't for air conditioning but for warm spaces and hot beverages; and Alitas, at 597,446 residents per storefront, shows formal leisure is nearly absent.

SEL: C and C– | Age: 25-45 | Gender: Mixed | Competition: LOW | Peak hours: Thu-Sun 6:00-11:00 PM

06

Private clinic with an accessibility focus

192,506 people with some form of disability (5.4%, rated high) and the Farmacias category already saturated (5,549 residents per storefront, the second-densest in the area). Instead of competing on over-the-counter medicine, a clinic with universal access and an on-site lab meets a need that isn't currently covered.

SEL: C and C– | Age: All ages | Gender: Mixed | Competition: MEDIUM | Peak hours: Mon-Sat 8:00 AM-8:00 PM

07 Private security and monitoring for businesses

Intentional injuries, other thefts, and damage to public property all register at decile 9, rated very high. Every business in the area needs to budget for security, even though business robbery itself is only average (decile 5): the risk comes from the general environment, not a direct hit on the store.

SEL: B2B | Age: Businesses | Gender: Mixed | Competition: MEDIUM | Peak hours: Mon-Sun 24 h

08 Supplies and animal health for mixed-system livestock

202,321 head are free-range and 179,596 are stall-fed (fully and semi-stall-fed combined): a hybrid system that needs both field supplies and herd health services as well as technical balanced feed — two businesses on the same land.

SEL: B2B | Age: Growers | Gender: Mixed | Competition: LOW | Peak hours: Mon-Sat 8:00 AM-6:00 PM

09 Specialty retail for the C and C– bracket

The C and C– population totals 1,014,863 people (28.3%, rated high), and the Tienda de lencería category, at 275,744 residents per storefront, shows specialty retail is among the most underserved in the area. A mid-price, curated format captures that volume without fighting already-saturated convenience chains.

SEL: C and C– | Age: 25-50 | Gender: Female | Competition: LOW | Peak hours: Mon-Sat 11:00 AM-8:00 PM

10 Specialized transport and last-mile logistics

With 1,543,525 registered vehicles (decile 10) and a fleet that grew 7.8% in a year, the transport ecosystem already exists; combined with 288,229 private motorcycles, delivery of daily basics and high-value farm products can be outsourced without investing in a fleet.

SEL: B2B | Age: Operators | Gender: Mixed | Competition: MEDIUM | Peak hours: Mon-Sun, on demand

Peak consumption days and hours

Business type	Peak days	Peak hours	Consumer profile
Grab-and-go format (coffee, bread, hot drinks)	Mon-Fri	7:00-9:00 AM and 6:00-8:00 PM	Urban worker and NSE C household
Daily basics and convenience	Fri-Sun	5:00-9:00 PM	NSE C and D household with a motorcycle or car
Covered dining and leisure	Thu-Sat	7:00-11:00 PM	NSE C and C– adults 25 to 45
Motorcycle repair shop	Sat	9:00 AM-2:00 PM	Motorcycle owner, 20 to 45
Farm supplies and B2B collection	Mon-Sat	8:00-11:00 AM	Grower during planting or harvest season

Categories to avoid

CATEGORIES NOT ADVISED WITHOUT VERY CLEAR DIFFERENTIATION OR A SOLID COMPETITIVE ADVANTAGE

Tiendas de conveniencia — 990 storefronts and 3,621 residents per storefront, the most saturated category in the area: competing without logistics scale is entering at a structural disadvantage against established chains.

Cadena F. Nacional (pharmacies) — 646 storefronts at 5,549 residents per storefront, the second-densest category: the over-the-counter medicine market is already covered.

Water-intensive trades without their own supply — with only 72.4% of households on piped municipal water (decile 4, very low), verifying supply is essential before committing to a business model.

Late-night retail without a security plan — with intentional injuries and other thefts at decile 9, extended hours without a security protocol amount to direct exposure.

Key success factors in the region

- Verify water supply before signing any lease: only 72.4% of households have piped municipal water, decile 4.
- Budget for security from day one: intentional injuries, other thefts, and damage to public property all sit at decile 9.
- Budget for in-house training: the average years of schooling is 7.6, equivalent to incomplete secondary school.
- Plan for mixed car-and-motorcycle mobility: 47.2% of households own a car (decile 8) and 16.6% own a motorcycle, rated very high.
- Cold-chain logistics as the backbone of any farm-linked project: the area holds 37.4% of national avocado volume.

> *With the recommendations in place, we turn to the region's formal classification and the map of commercial risks every investor should know before deciding.*

08 · REGION CLASSIFICATION AND RISKS

How is this region classified and which commercial risks should you know before investing?

Region type	AGRO-INDUSTRIAL — only 1.0% of local employment sits in the primary sector, yet the area holds 37.4% of national avocado volume and reaches decile 10 in more than twenty crops: farmland of national scale sitting under an employment structure that's mostly retail and services.
Consumption capacity	MODERATE — dominant NSE is D, E and NA (70.3%), with an NSE C and C– bracket of 1,014,863 people (28.3%, rated high) and an ABC+ niche of 49,733 people (1.4%, rated very high). Economically active population (PEA) of 1,712,680 people (47.8%, rated very low).
Customer profile	A young-adult population in household-formation years (20-to-39 groups above the national average), predominantly NSE D, E and NA with a meaningful middle-income bracket, mixed mobility with notably high motorcycle use, and a rooted local component marked by low in-migration from other states and an above-average indigenous-language presence.
Commercial activity	Commercial Activity Index: 495,499 | CAI/Jobs: Very High | CAI/Population: Average — commercial cores with heavy traffic (IDC/employment very high) inside a large area where formal retail per resident is more limited (IDC/population average), the pattern expected at this regional scale.

Main commercial risks

Commercial risk	Level
Intentional injuries, other thefts, and damage to public property all register at decile 9, rated very high: insurance, security, and lighting are a fixed cost from month one for any nighttime or high-traffic operation.	**High**
Dependence on two export crops (avocado and strawberry) that are sensitive to frost, drought, and plant-health conditions: an adverse growing season hits consumption across the whole region, not just farmland.	**High**
Only 72.4% of households have piped municipal water (decile 4, very low): any water-intensive trade needs to verify supply before committing capital.	medio
Average years of schooling is 7.6, rated very low: this calls for budgeted in-house training from the start of any operation.	medio
Convenience stores and pharmacies already hold the highest density of formal storefronts in the area: entering without a differentiator means competing on price against installed scale.	**Low**

Key success factors

- Location along the corridor linking Morelia to Michoacán's avocado-growing belt.
- Differentiation through accessibility and service in a formal market already dense in convenience and pharmacy.
- A tie to the avocado and strawberry export chain, the area's two proven drivers of national scale.

- Budgeted in-house training from the outset, given the average schooling level of 7.6 years.

> *With the risk map clear, we close the quantitative analysis with social considerations — the data that reveals responsibilities and business opportunities with positive community impact.*

09 · SOCIAL CONSIDERATIONS

Which social data opens business opportunities with positive community impact?

Market analysis cannot ignore the region's social dimension. This data reveals both the responsibilities of businesses that settle here and opportunities for business models with positive social impact and proven commercial return.

Education and human capital

Educational indicator	People	% of population	Analysis
Illiterate population, 15 and older	173,814	4.8%	High
No schooling, 15 and older	189,421	5.3%	High
Completed primary school, 15 and older	430,389	12.0%	High
Completed lower secondary, 15 and older	640,431	17.9%	Average
Post-basic education, 18 and older	868,707	24.2%	Average
Average years of schooling	7.6	Equivalent to incomplete secondary school	Very Low

Disability in the region

Type of disability	People	% of population
Any disability (total)	192,506	5.4%
Walking or climbing stairs	98,238	2.7%
Seeing, even with glasses	78,664	2.2%
Speaking or communicating	27,595	0.8%
Hearing, even with a hearing aid	43,951	1.2%
Dressing, bathing or eating	36,709	1.0%
Remembering or concentrating	35,981	1.0%
With a mental health condition	42,620	1.2%

Population origin

Indicator	People	% of population
Born in another state	265,024	7.4%
Indigenous language speakers (age 3 and older)	86,173	2.4%

Key social insights

01

ACCESSIBILITY AS A COMPETITIVE EDGE

192,506 people with some form of disability (5.4% of the area, rated high) and 98,238 with difficulty walking or climbing stairs. A ramp and an accessible restroom aren't paperwork — they're a segment no one is serving well today.

02

TECHNICAL TRAINING IS THE GAP

Average years of schooling is 7.6 (rated very low), with 24.2% having some post-basic education. Any operation needs to budget for in-house training, and training itself is a trade with its own built-in demand.

03

A LOCAL, ROOTED MARKET

Only 7.4% of the population was born in another state (rated low), and 2.4% speak an indigenous language (rated high): a market built on relationships and word of mouth, not one built on passing-through turnover.

> *With the social context complete, we reach the close: actionable conclusions, the opportunity traffic light and the next steps to turn this analysis into a well-founded investment decision.*

10 · CONCLUSIONS AND NEXT STEPS

The region in 3 facts

3,584,675	A market that's mature in basics, empty in leisure	37.4% of national avocado
residents across 78 municipalities within a 100 km radius of Morelia, dominant NSE D, E and NA with a C and C– bracket of over a million people	3,025 formal storefronts, one for every 1,185 residents: convenience and pharmacy saturated, wings and burger formats nearly absent	the area is the country's top producer of this crop (decile 10), with strawberry, sorghum, wheat, and corn also at decile 10

Best bets — Opportunity traffic light

Recommended category	Opportunity	Competition
Cold-chain packing for export avocado and strawberry	**HIGH**	LOW
Value-added avocado processing	**HIGH**	LOW
Covered restaurant or café built for thermal comfort	**HIGH**	LOW
Motorcycle service and parts	**MEDIUM**	MEDIUM
Private security and monitoring for businesses	**MEDIUM**	MEDIUM

HIGH opportunity (structural demand + aligned SEL + low formal competition). MEDIUM opportunity (real demand but with more formal competition).

The 2 risks you cannot ignore

Risk 1 — The environment, not the counter, drives the security cost

Intentional injuries, other thefts, and damage to public property all register at decile 9, rated very high, while business robbery itself is only average (decile 5). The cost of operating here doesn't come from a direct hit on the business — it comes from security, lighting, and protocols against a general environment that's less safe than the national average.

Risk 2 — Two crops carry much of the economic engine

The area holds 37.4% of national avocado volume and 21.6% of strawberry, both at decile 10. An adverse season from frost, drought, or pests in either one doesn't just hit farmland — it contracts consumption across the whole region, including urban trades that seem unrelated to the farming cycle.

Letter to the Investor

What we found is a region whose biggest risk isn't at the counter — it's the surrounding environment: the area's general insecurity index is high, and any operation needs to budget for security and lighting from month one, not discover the need in month six. That said, business robbery specifically is only average, so that cost is manageable with the right measures, not a barrier to entry.

The core opportunity is agricultural, but it's solved with logistics: the area produces more than a third of Mexico's avocado and a fifth of its strawberry, and today much of that value leaves untransformed. Whoever solves packing, cold storage, and processing captures margin no one in the region retains today. Meanwhile, the formal urban market is saturated in basics — convenience, pharmacy — but nearly empty in leisure and specialty retail: there's room there without fighting on price.

The land has already proven it can be the best in the country. Now it's a matter of deciding who keeps the value that leaves untransformed today.

Recommendations for deeper study

- Comparative analysis with MktCompass: replicate this analysis across several municipalities in the same region to identify which one offers the best balance of demand and lowest direct competition for the chosen category.
- Consumer habit surveys in the area: validate with real consumers what they buy, where, how often and what the current offering lacks.
- Mystery shopper visits to competitors: assess quality, price, service and footfall of existing businesses in the categories of interest.
- Interviews with farm producers about their needs for inputs, services and commercialization channels.
- Road network and travel time analysis between municipalities in the region to estimate the real customer catchment radius.
- Traffic counts at intersections of interest to estimate real traffic at different times and days of the week.

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