

Figure 1: SD Manufacturing Employment, 1983-2000

Source: California Employment Development Department

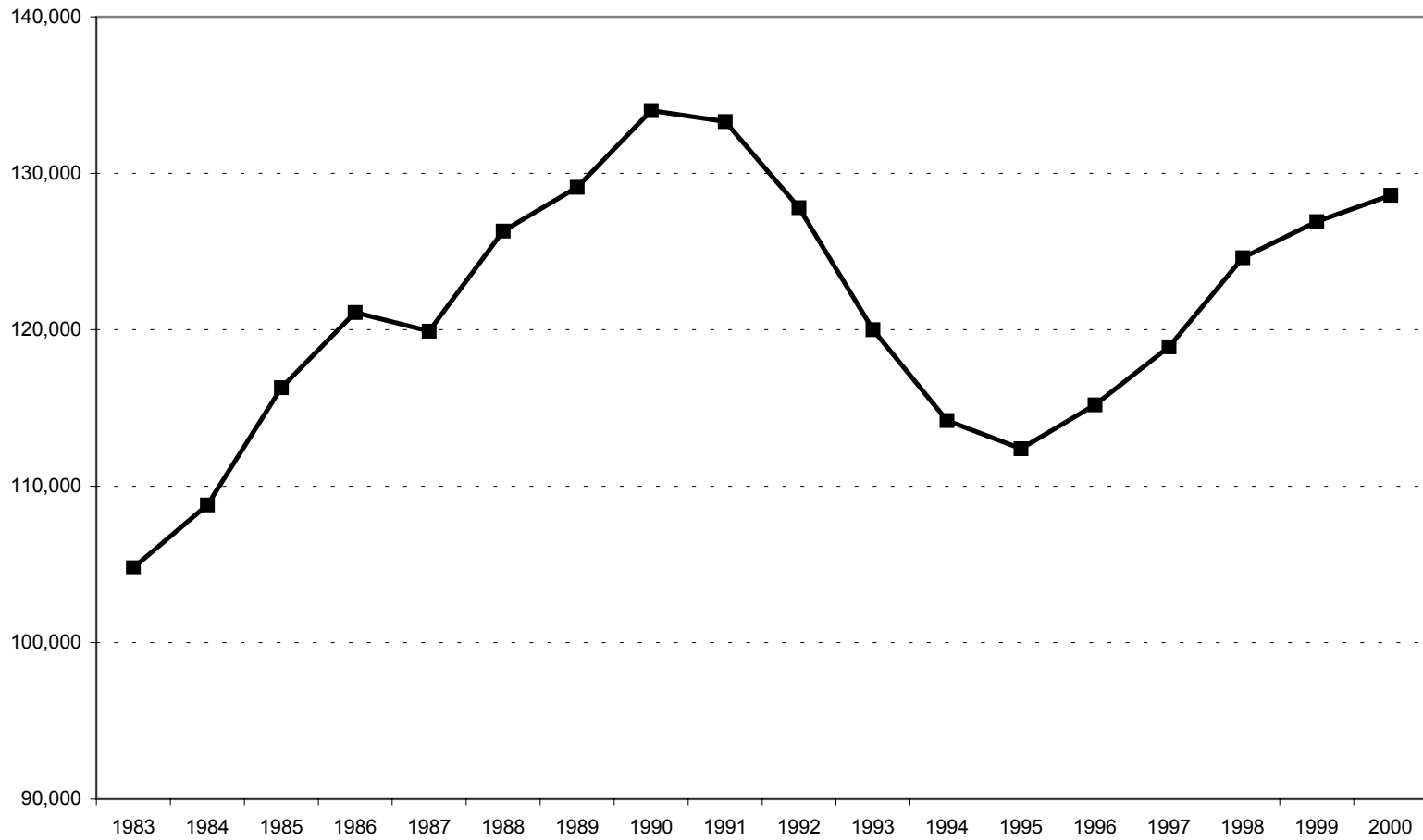


Figure 2: SD Manufacturing, Selected Sectors, 1983-2000

Source: California Employment Development Department

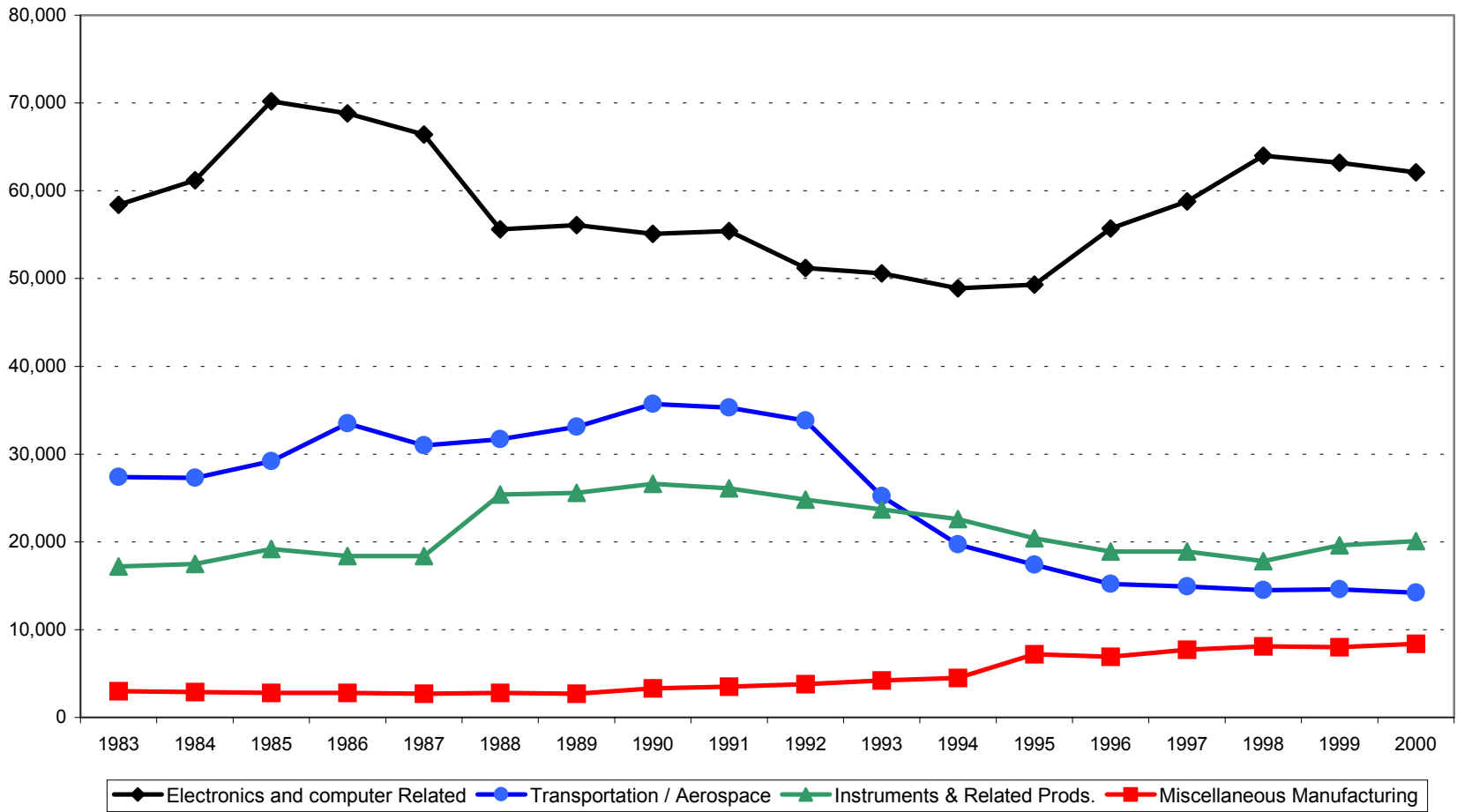


Figure 3: SD Service Industry Employment, 1983-2000

Source: California Employment Development Department

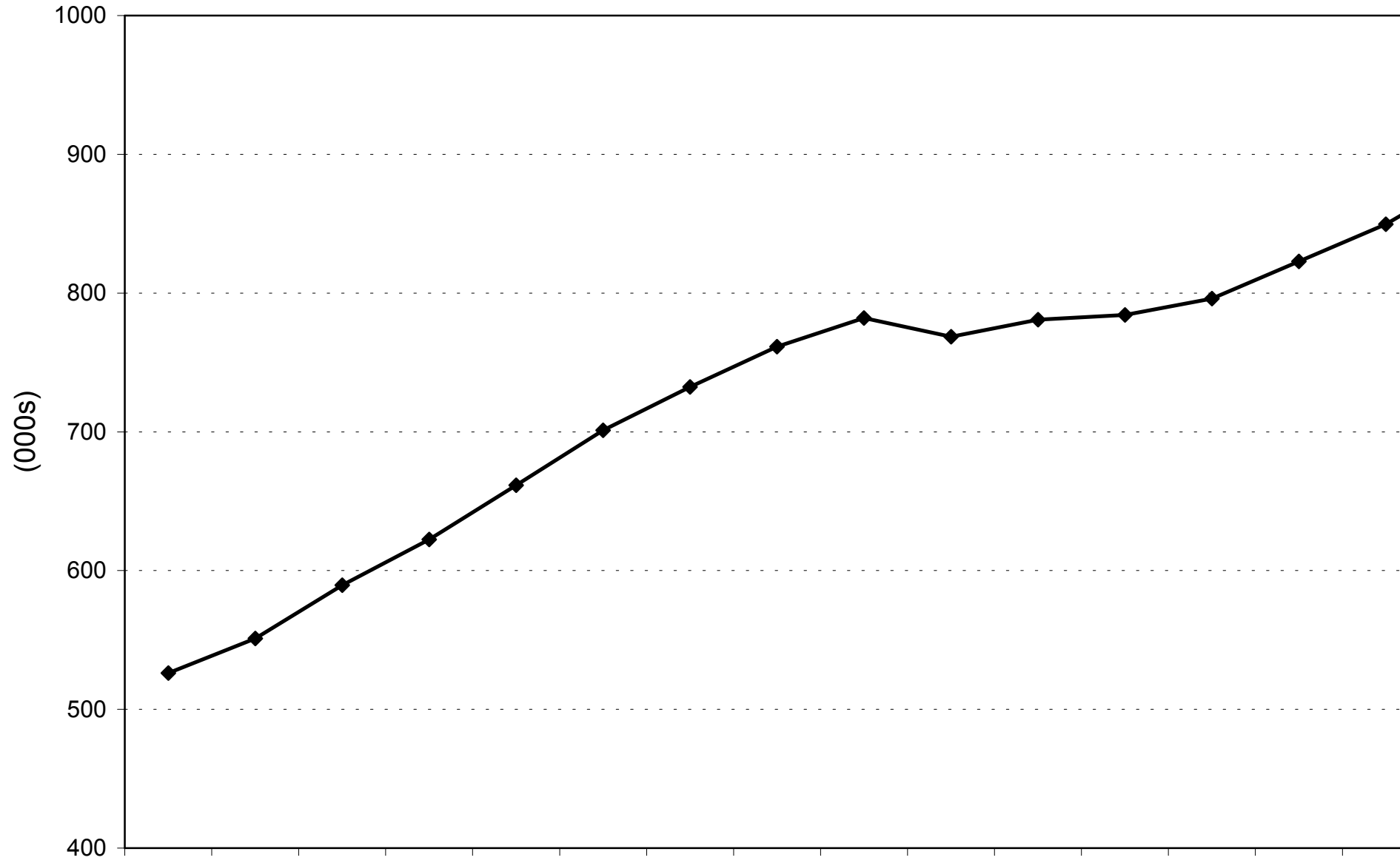


Figure 4: San Diego County Employment Forecasts, 1995-2020

(Source: SANDAG)

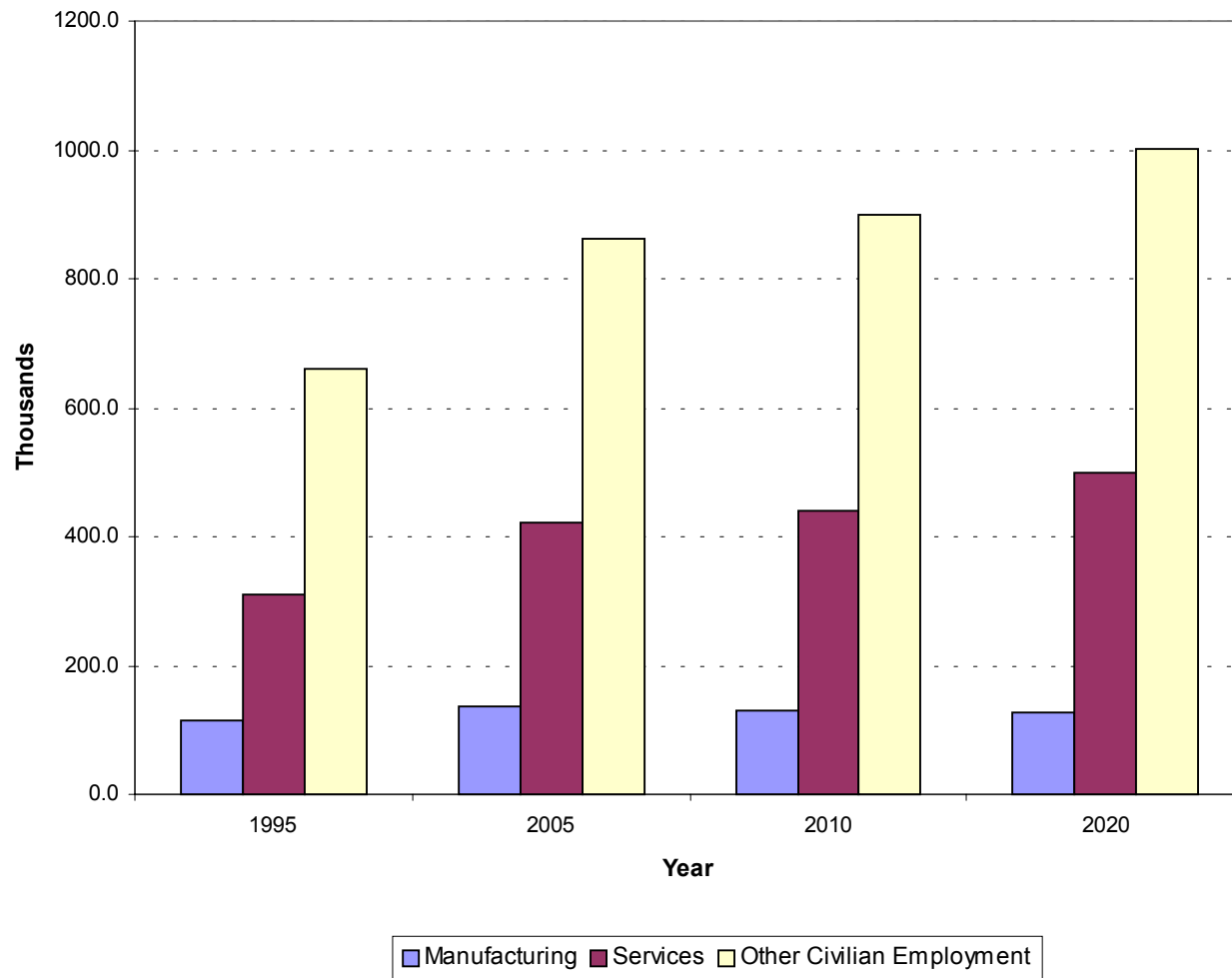


Figure 5: Baja California Manufacturing GDP, 1993-1998

Thousands of Pesos, 1993 Prices

SOURCE: INEGI

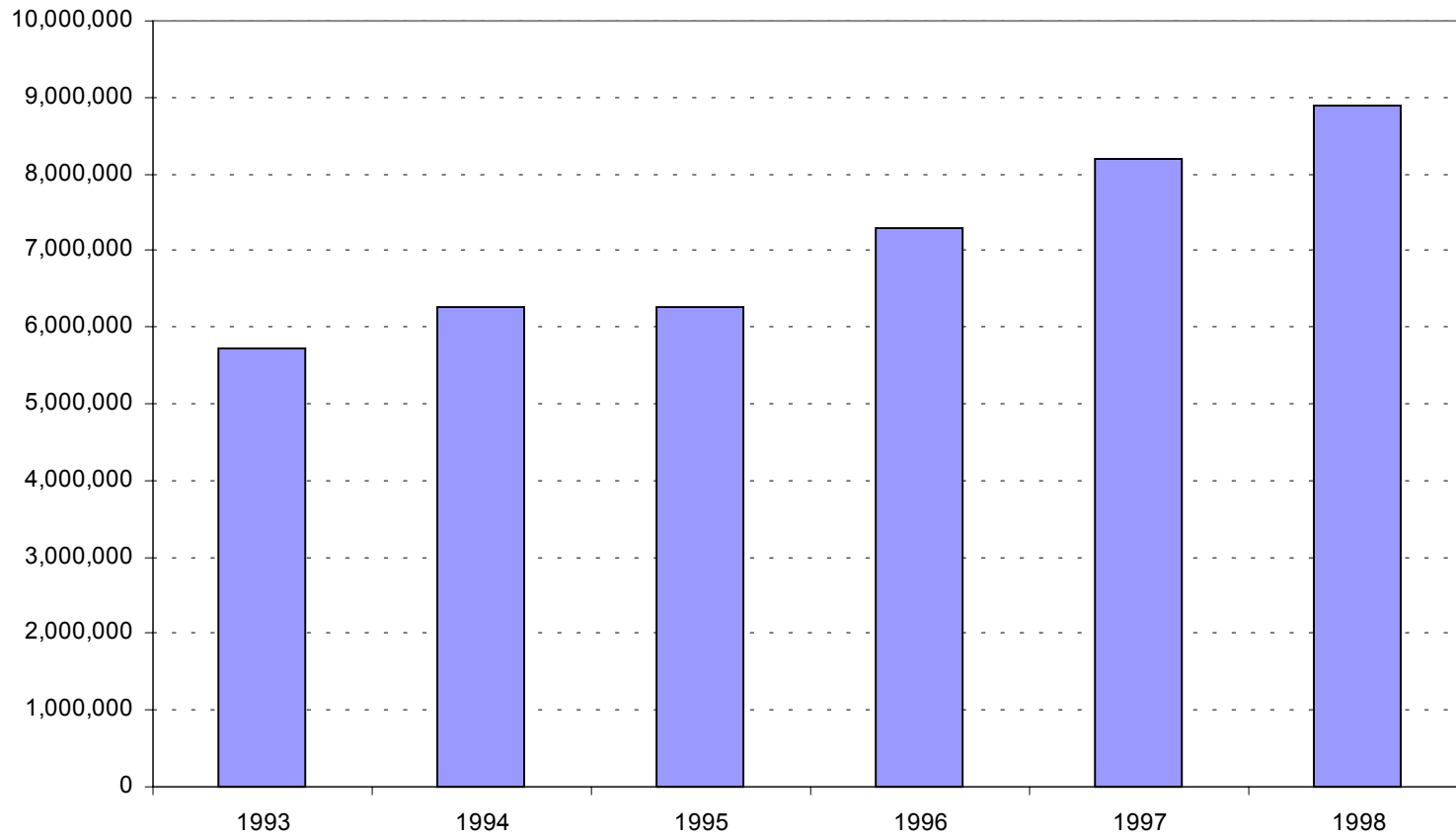


Figure 6: Manufacturing as Proportion of Baja California GDP, 1993-1998

SOURCE: INEGI

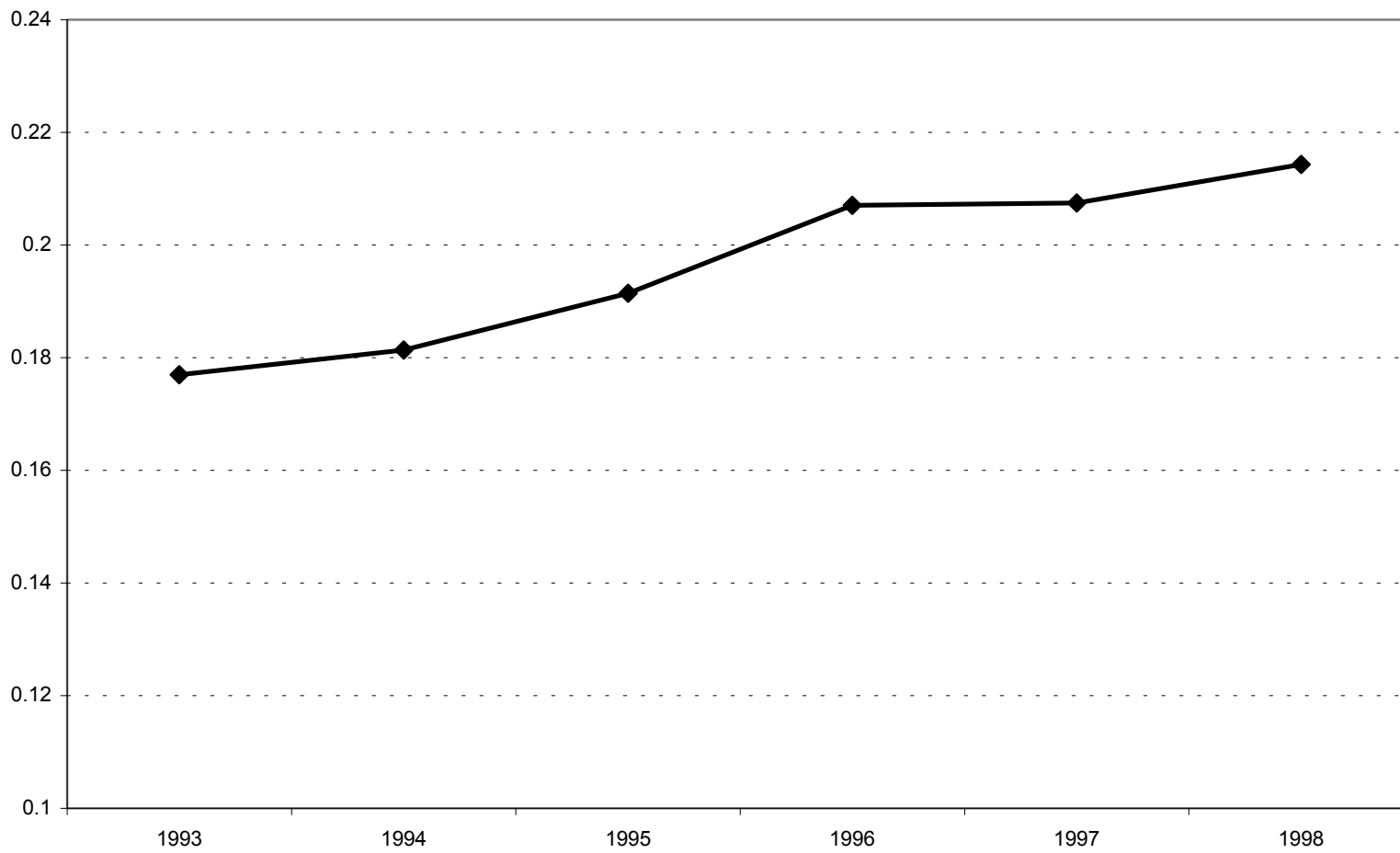


Figure 7: Baja California Maquiladora Employment, 1990-1999

SOURCE: SECOFI

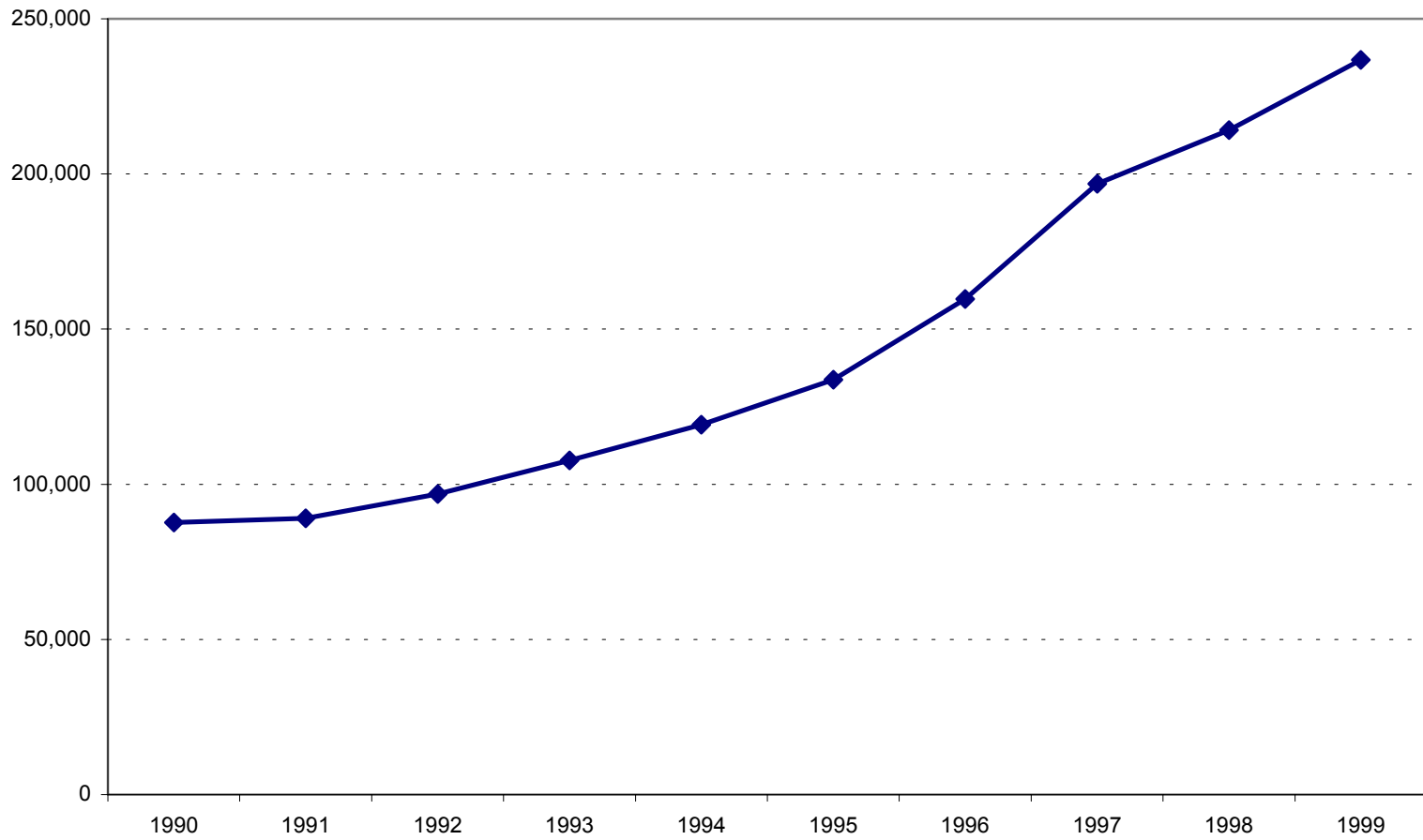


Figure 8: Maquiladora Employment, Tijuana, 1990-1999

Source: SECOFI

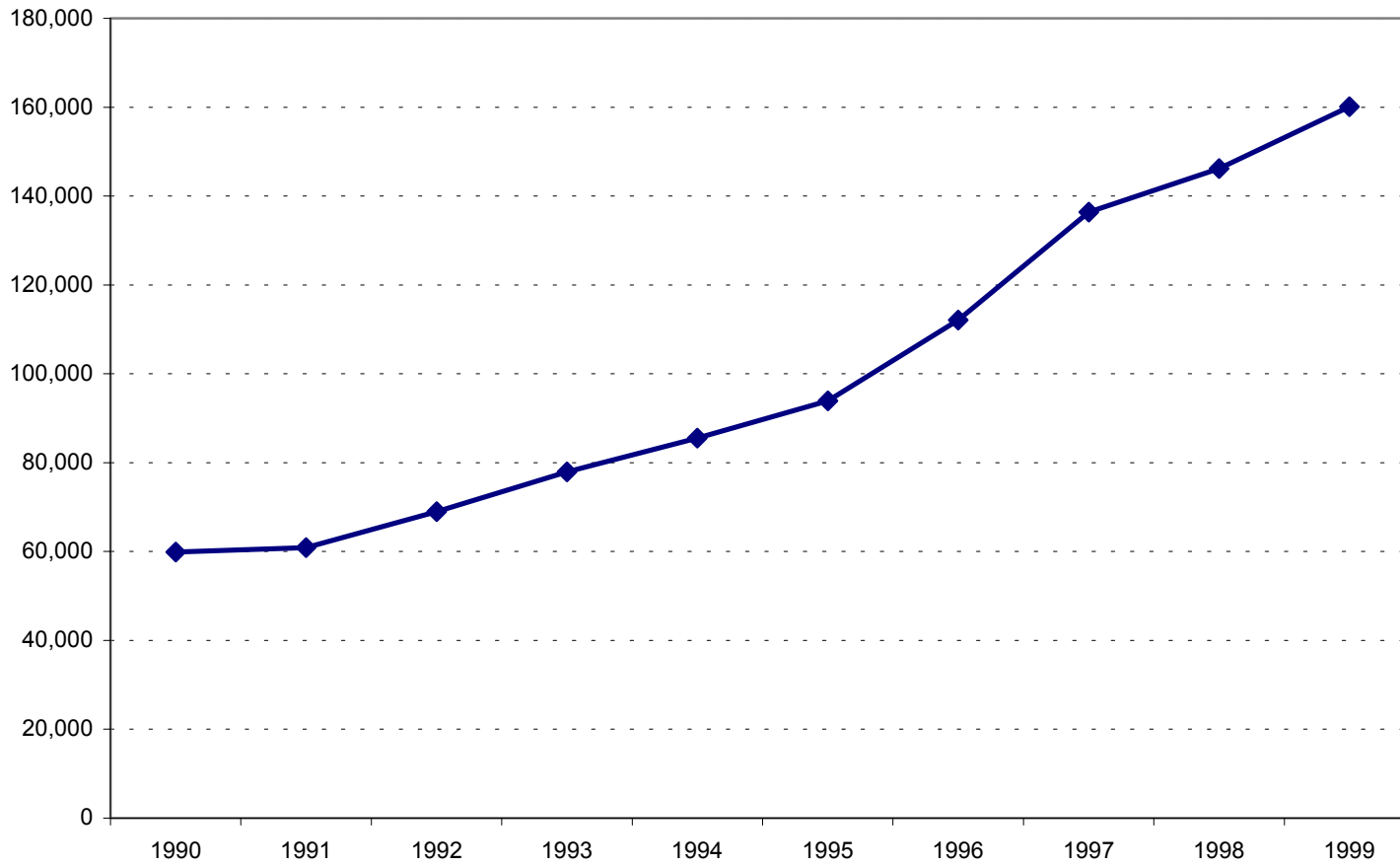


Figure 9: Mexico Manufacturing Employment, Border Zone, 1990-1999

Source: SECOFI

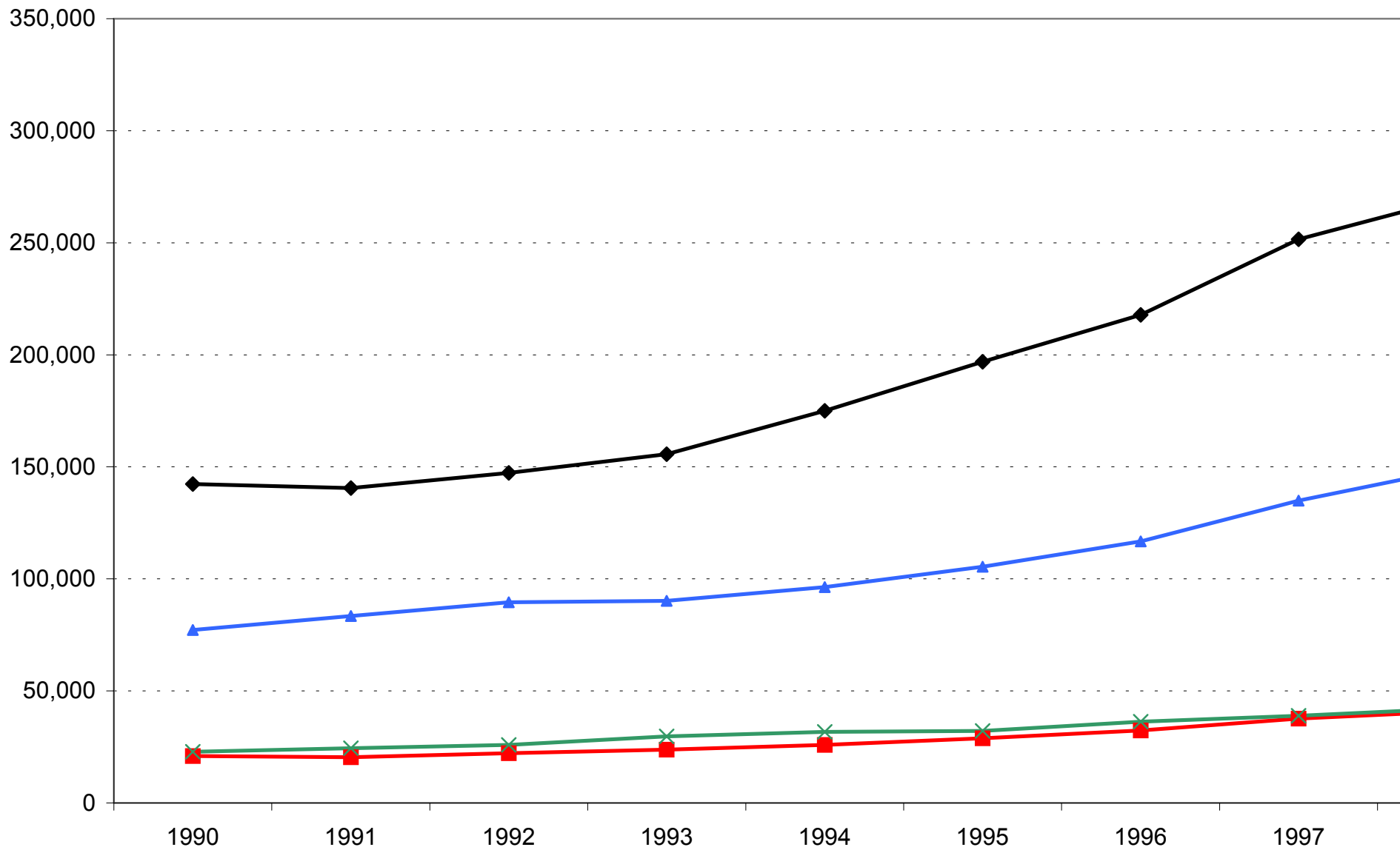


Figure 10: Manufacturing Hourly Wages, Mexico and Selected Countries, 1998-1999

(Source: INEGI 2000)

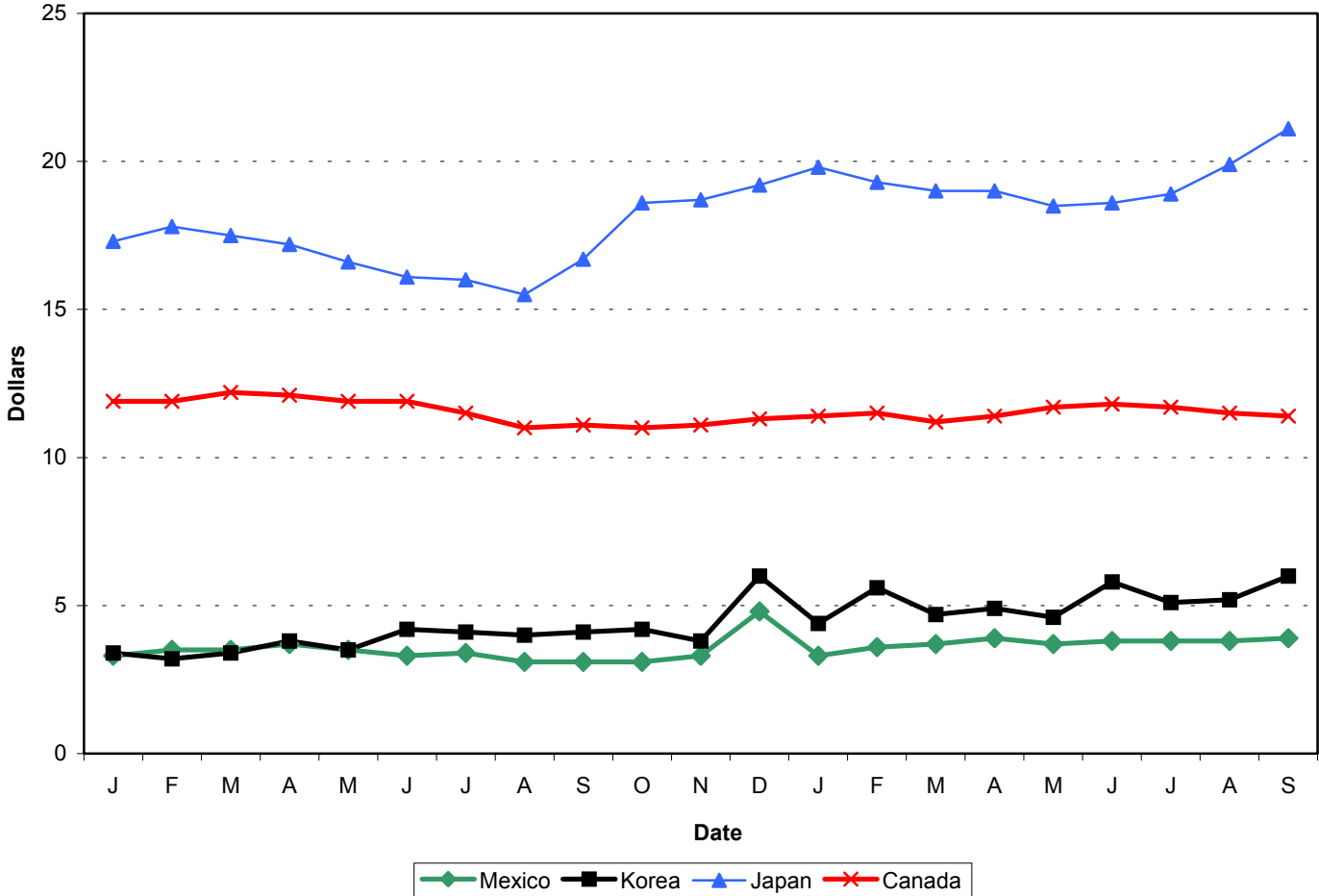


Figure 11: Maquiladora Labor Costs

(Source: Tijuana Economic Development Corporation)

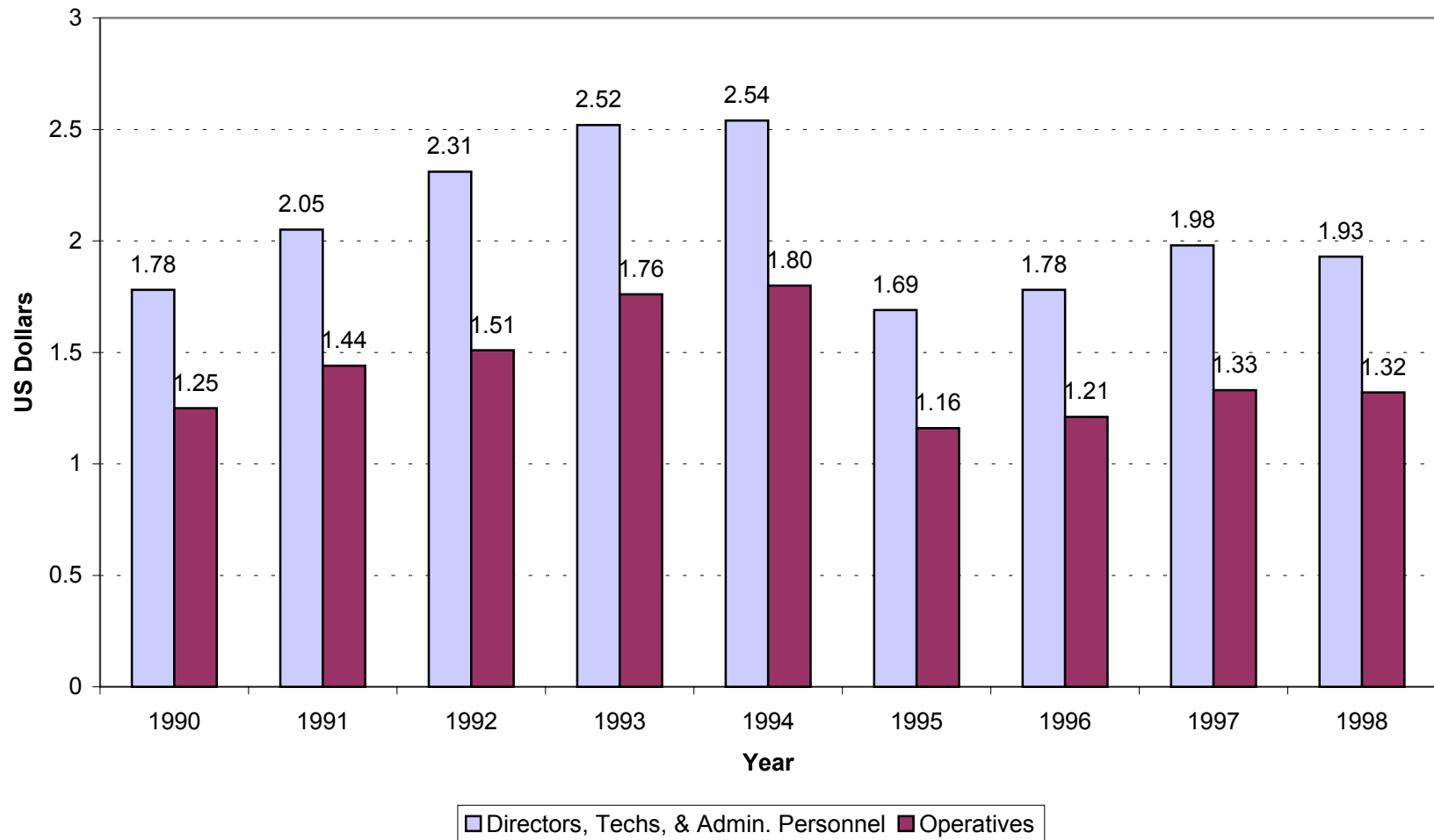
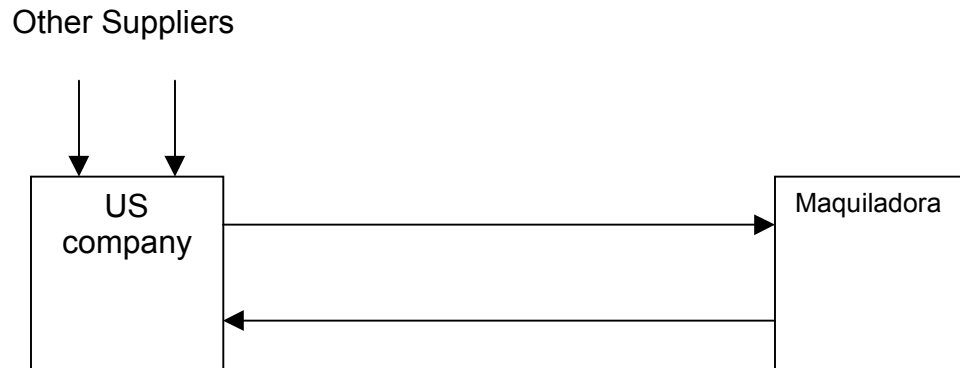


Figure 12: Twin Plant Model Versus Production Complex Model (TV Industry)

Twin Plant (Traditional Maquiladora) Model: US plant ships materials to maquiladora which assembles/process them and returns finished products to US counterpart:



Production Complex (Globalized Electronics Industry) Model: Large electronics and TV producers source components from various locations producing products for export from Mexico:

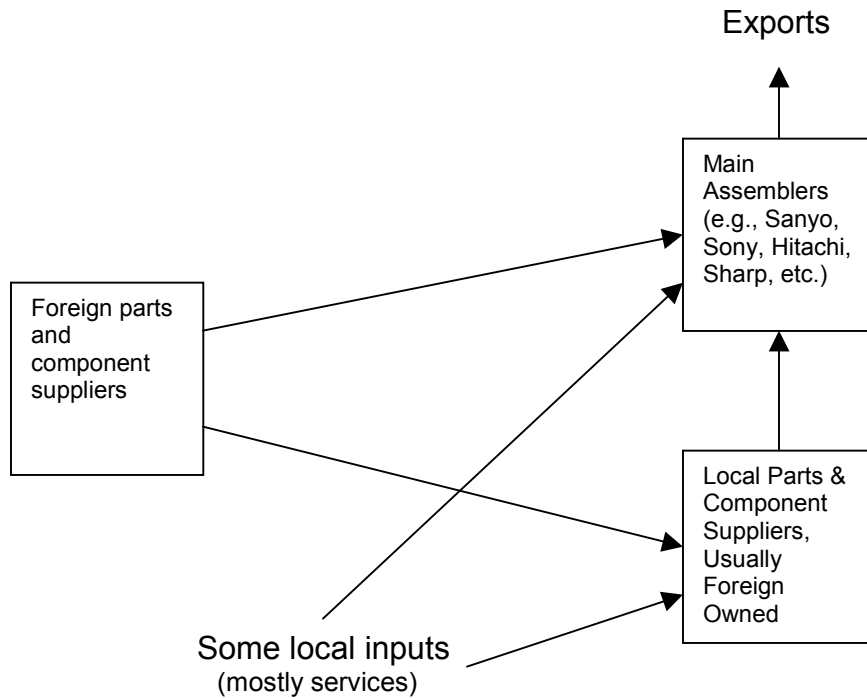
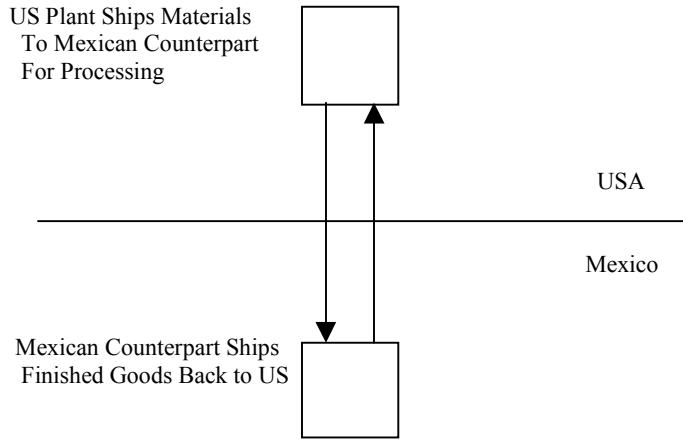
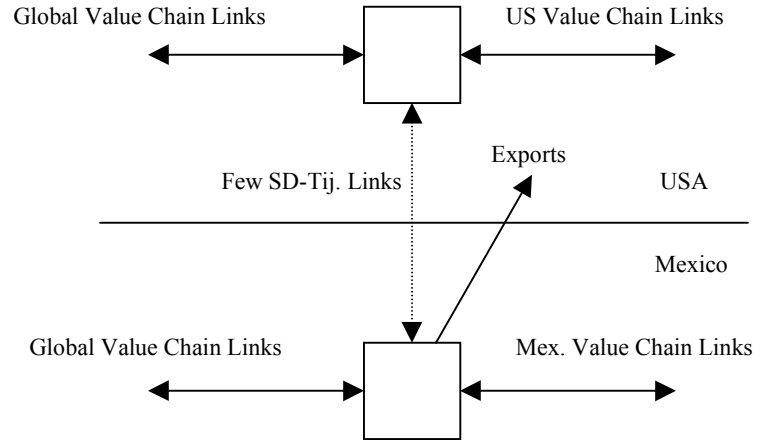


FIGURE 13: Selected Production Comparisons

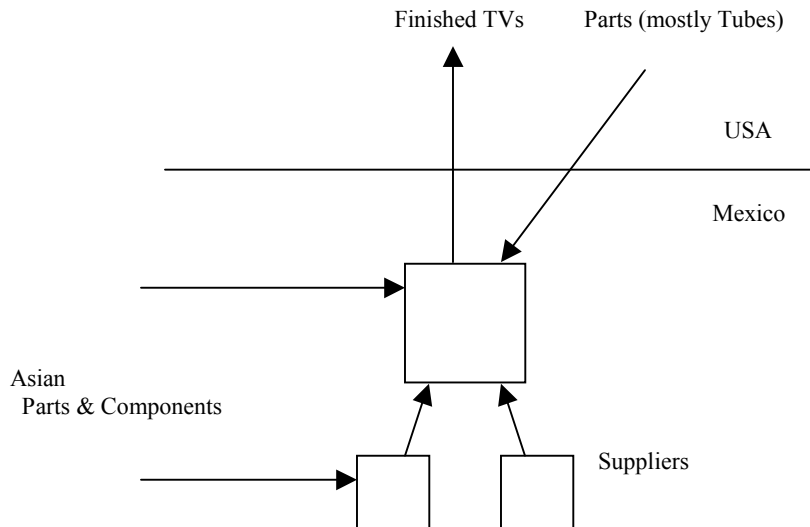
1: Traditional Twin Plants



2: Global Web (Separate Logics)



4: TV Industry



4: PC Industry (Mexico case)

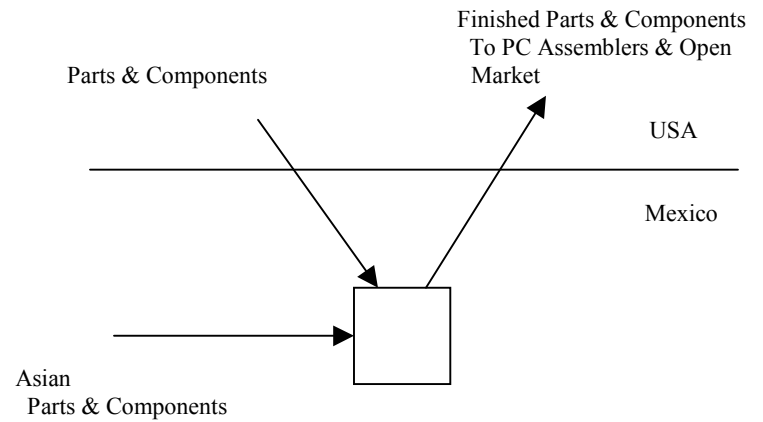


Table 1: Various San Diego Small Manufacturers

Name	Location	Product	Employees	Plant Location(s) (outside county)
AEM Inc.	Sorrento Mesa	Electronic Components	92	
Arcoa Industries	Escondido	Gardening Tools	25	
BioFilm Inc.	Vista	Personal Lubricant	27	
Atcom/Info	San Diego	Internet Kiosks	22	
Bee International	Chula Vista	Candy	40-200	
The Box Co.	Otay Mesa	Cardboard Boxes	17	
California Chariot	Carlsbad	Scooters	6	
Clinicon	Carlsbad	Laser Scalpels	30	
Darmark	Poway	Machined Parts	70	
DDH Enterprise	Vista	Cables and Harnesses	57	
Deering Banjo Co.	Lemon Grove	Banjos	20	
Delectable Display	Carlsbad	Upscale Display Fixtures	12	
Dimension One Spas	Vista	Movable Hot Tubs	200	
Golf Laboratories	San Diego	Golf Robots	6	
Green Field Paper Co.	San Diego	Recycled Paper	8	
Haro Bikes	Vista	BMX & Mountain Bikes	26	
IDG	Santee	Inflatable Promotions	27	
Kashi	San Diego	Cereal	18	Subcontractors in US
Kay Computers	Solana Beach	Personal Computers	3	
The Lamkin Corp.	Otay Mesa	Golf Grips	300	China, Tijuana
Laser Power Corp.	San Diego	High Performance Lasers	220	Tijuana, Brussels
LXN Corp.	San Diego	Blood Glucose Monitors	70	
Marotz Inc.*	Jamul	Manufacturing Process Management Software	95	Office in Tijuana
Mountain High Hosiery	San Diego	High-Fashion Socks	1000 (Worldwide)	Costa Rica; leased plants in Alabama, N & S Carolina
Nightrider Systems	San Diego	Specialized Lights	55	Subcontractors in Tijuana and Asia
Orbis Technologies	Otay Mesa	Electronic Parts	25 (in US)	Tijuana, Argentina
Parpro	Rancho Bernardo	Electronics Contract Manufacturer	6 (US), 150 (Tijuana)	Tijuana
Pryor Products	Oceanside	IV Stands	50	
Redsand Inc.	Encinitas	Sports Garments	45	
ReWater Systems	Chula Vista	Irrigation Systems	8	
RK2 Systems	Escondido	Large Water Filters	4	
RSI ID Technologie	Chula Vista	Labeling Technology	35	
Sanuk	Solana Beach	Sandals	N/A	Asia
Seda Products	National City	Kayaks, Canoes	27	
Soho Inc.	La Jolla	Ergonomic Computer Workstations	N/A	Various, packaging center in US Midwest
Spectrographics Corp.	Sorrento Valley	Technology Contract Manufacturer	190	
Speedplay Inc.	San Diego	Bicycle Cleats, Pedals	12-22	Unspecified subcontractors
Tech Wear Inc.	Carlsbad	Static-control garments	7	N Carolina (fabric), N Dakota (assembly)
Thousand Mile	Oceanside	Sports Garments	22 (US), 30 (Mexico)	Rosarito
Tiernan Communications	Kearny Mesa	Digital TV Equipment	120	

Note: Compiled from San Diego Union-Tribune, various 1997-2000. For illustrative purposes only, should not be interpreted as statistically significant.
 *Strictly speaking not a manufacturer; included because they are significant supplier to Baja maquiladoras.

Table 2: ASIAN MAQUILADORAS IN TIJUANA, 1999

Country	Maquiladoras		Electronics Related	
Japan	65	49.6%	59	79.7%
Korea	28	21.4%	11	14.9%
Taiwan	10	7.6%	3	4.1%
China	5	3.8%	1	1.4%
Philippines	1	0.8%	0	0.0%
Vietnam	1	0.8%	0	0.0%
Asian (Country N/A)	21	16.0%	0	0.0%
TOTAL	131	100%	74	100.0%

SOURCE: Author's research, Japanese Maquiladora Association, Tijuana Maquiladora Association, CANACINTRA, Named companies are in Tijuana unless otherwise noted.

Table 3: Asian Maquiladora Production in Tijuana by Type (total N = 97)

TELEVISION	25	ELECTRONICS-VARIOUS	25
TV Assembly	14	Electronic Assembly	8
Chassis	2	Components	2
Sets, Yokes	8	Plates	1
Nucleus	1	Printed circuits	1
Coils	2	"Device"	1
Cinescope	1	Speaker assembly	1
TV Related	2	Magnetic head assembly	2
Videocassettes	1	PC / TV	5
VCRs & PlayStations	1	Computer keyboards	1
TV Components	10	Components	3
TV parts	7	Vacum cleaners	1
Cabinets	3	Electronic Components	10
COMPUTERS	10	Printed circuit boards	3
PC Components	10	Electronic circuit boards	1
Computer parts	2	Blasters	1
Magnetic heads	3	Electronic components	2
Floppy disks	3	Circuit parts	1
Keyboards	1	Electronic cards	1
Printers	1	Electronic cones	1
ELECTRICAL	14	Others	2
Connectors Assembly	6	Music keyboards	1
Cables & harnesses	6	Photographic camera	1
Electric Assembly	2	OTHER NON-ELECTRONIC	22
Electric components	2	Manufactures	4
Power sources	3	Manufacture of cotton	
Power sources	1	resins, rubber products	2
Power suppliers	2	Cardboard manufacture	1
Other	3	Speaker paper	1
Electric fans	1	Plastics	5
Refrigerators	2	Foam packaging	2
Metals	9	Plastic moulding	1
Razor blades	1	Plastic cases	2
Thermal dissipaters	1	Others	3
Metallic tongs for hair	1	Telephone sets	1
Containers:		Recording tapes/cassettes	1
Chassis & steel	1	Lighters	1
Cargo	1	Missing	1
Rechargeable batteries	1		1
Auto parts	2		
Metal speaker parts	1		

SOURCE: Author's research 1999, Japanese Maquiladora Association, Tijuana Maquiladora Association, CANACINTRA