



RENACIMIENTO MAYA
YUCATÁN

SEFOTUR
SECRETARÍA DE
FOMENTO TURÍSTICO



Tourism Investment Newsletter

Ist Quarter 2025

Content



- 1. Welcome.**
- 2. 2. Context and Current Situation of Yucatán.**
 - 2.1 Geographic Positioning.
 - 2.2 Two Strategic Hubs.
 - 2.3 Air connectivity.
 - 2.4 Highway, railroad and port infrastructure.
 - 2.5 Hotel infrastructure.
 - 2.6 Meeting Tourism.
 - 2.7 Tourism supply.
- 3. Yucatan's Tourism Market.**
 - 3.1 Demand for the destination at national and international level.
 - 3.2 Main reason for travel to Yucatan.
 - 3.3 Tourist Arrivals to the State (Cumulative).
 - 3.4 Cumulative Air Passenger Movement.
- 4. Competitive Advantages of Yucatan for Tourism Investment.**
 - 4.1 Why Yucatán?
 - 4.2 Attraction of Private Tourism Investment.
 - 4.3 Outstanding Public Investment.
 - 4.4 Main Hotel Brands in Yucatan.
 - 4.5 Inaugurations of new projects.
 - 4.6 Ongoing projects.



In this newsletter N°1, we present key information that positions Yucatán as a strategic destination for projects seeking growth and profitability. Economic stability, security, infrastructure in constant development and the growing demand for tourism, both national and international, make Yucatan an ideal destination for those who wish to invest in the tourism sector.

In addition, we will explore through statistical data, the unique opportunity to increase and boost the arrival of important projects, generating a positive impact on the local economy and contributing to the sustainable development of the state.

We invite you to discover why the magic of our state makes Yucatán the perfect destination for your next projects, in an ever-expanding environment that assures you a promising future.



Geographic Positioning

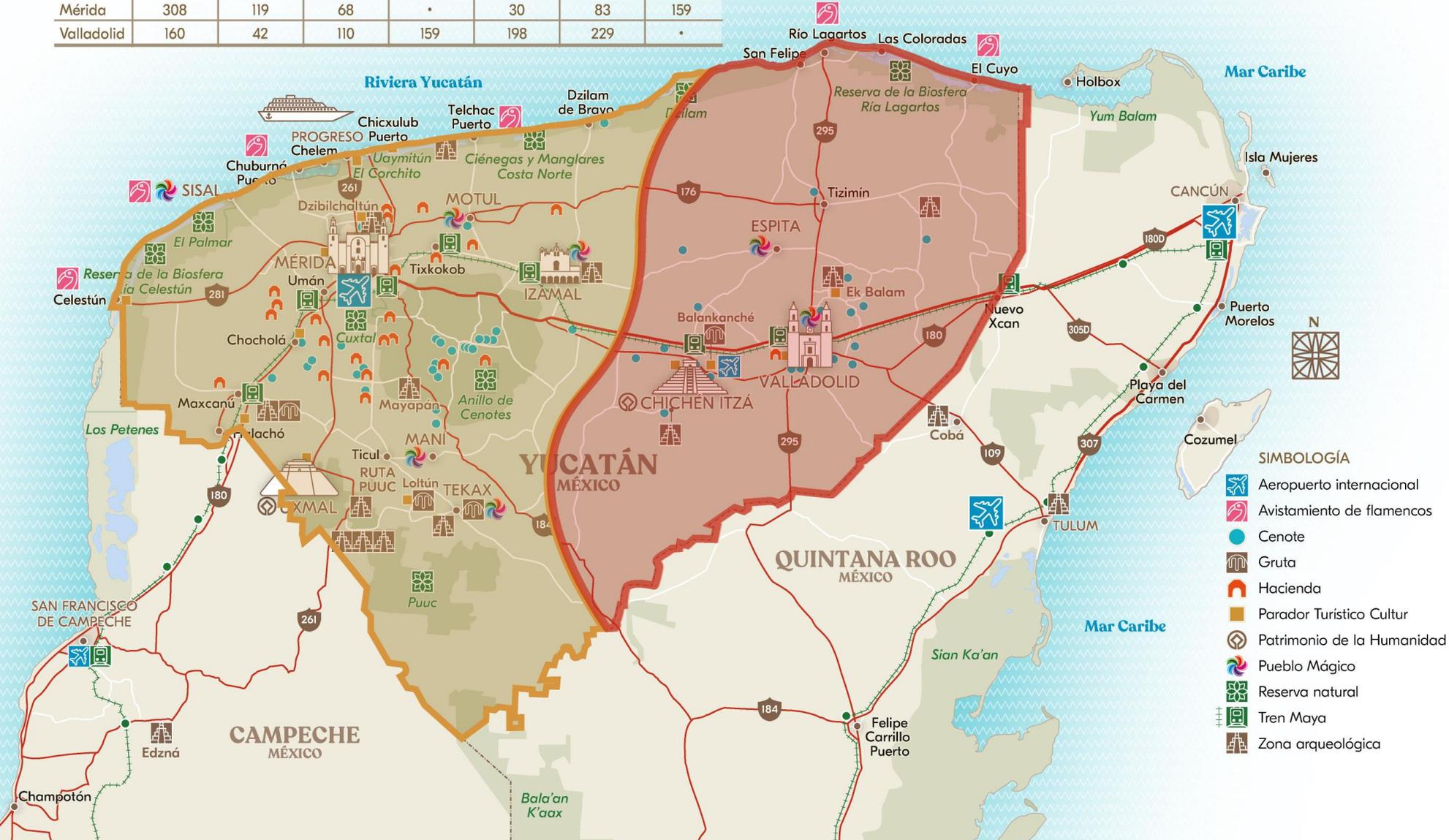
Yucatán's strategic location, with its proximity to the United States and direct access to maritime and air routes, makes the state a key player in Mexico's connectivity and economic development. This location not only favors trade, but also positions Yucatán as an attractive region for investment and economic growth in the southeast of the country.

DISTANCIAS (km)

| | Cancún Apto. | Chichén Itzá | Izamal | Mérida | Progreso | Uxmal | Valladolid |
|------------|--------------|--------------|--------|--------|----------|-------|------------|
| Mérida | 308 | 119 | 68 | • | 30 | 83 | 159 |
| Valladolid | 160 | 42 | 110 | 159 | 198 | 229 | • |

2 Strategic Hubs

- Mérida
- Valladolid



- SIMBOLOGÍA**
- Aeropuerto internacional
 - Avistamiento de flamencos
 - Cenote
 - Gruta
 - Hacienda
 - Parador Turístico Cultur
 - Patrimonio de la Humanidad
 - Pueblo Mágico
 - Reserva natural
 - Tren Maya
 - Zona arqueológica

Air Connectivity

07
International routes



Miami
Dallas



La Habana, Cuba
Miami
Orlando



Houston



Guatemala City



Toronto, Canadá

12
National routes



CDMX
Guadalajara
Monterrey
Oaxaca
AIFA



CDMX
AIFA
Guadalajara
León
Puebla
Monterrey
Veracruz
Villahermosa
Tuxtla
Querétaro
Toluca



AIFA

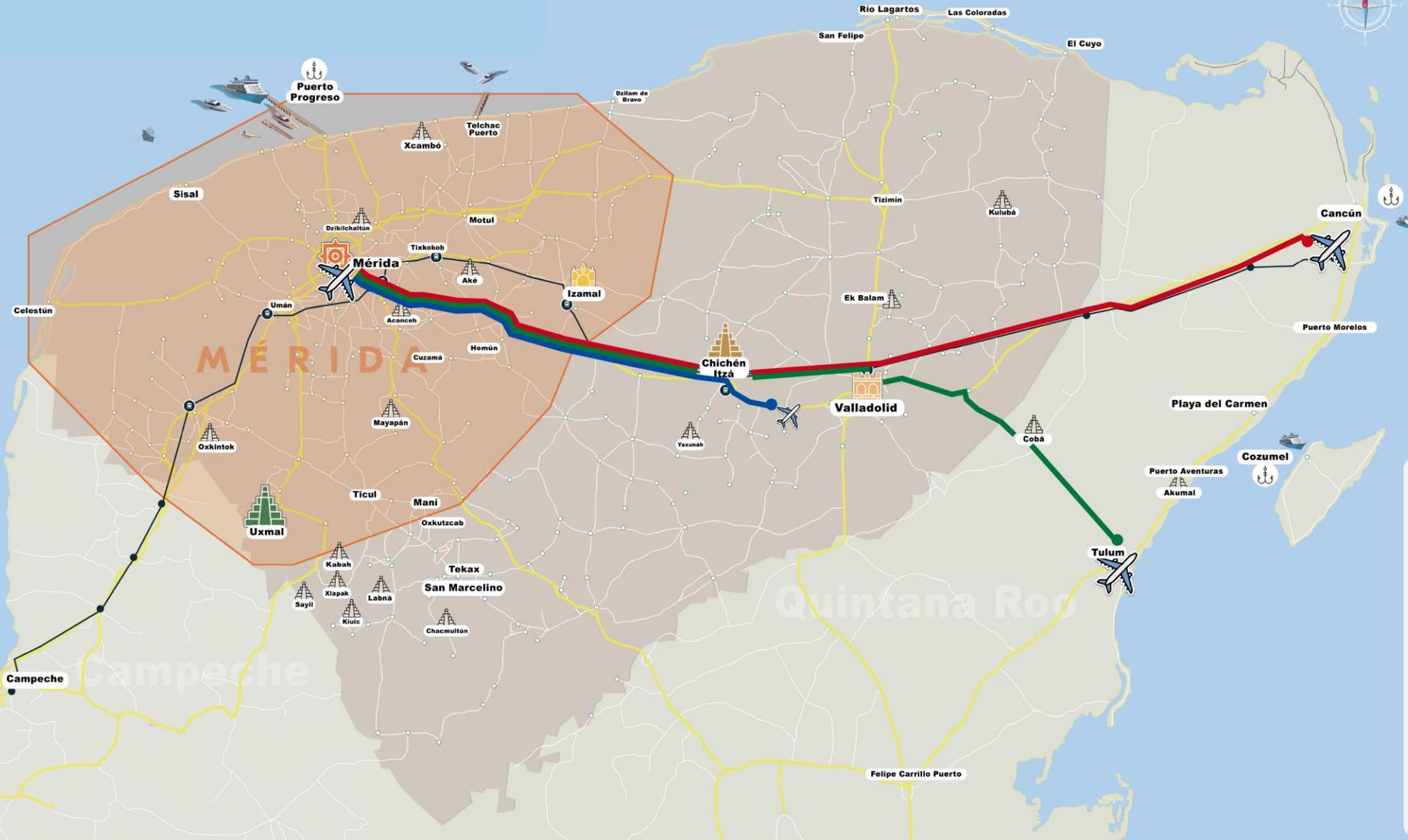


CDMX
AIFA



CDMX
Monterrey

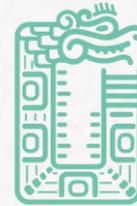
Road Infrastructure



Distance from:

| | Time | Distance |
|--------------|----------|----------|
| Mérida | 0 min. | 0 km |
| Cancún | 210 min. | 313 km |
| Tulum | 240 min. | 302 km |
| Chichén Itzá | 125 min. | 135 km |

Railway Infrastructure

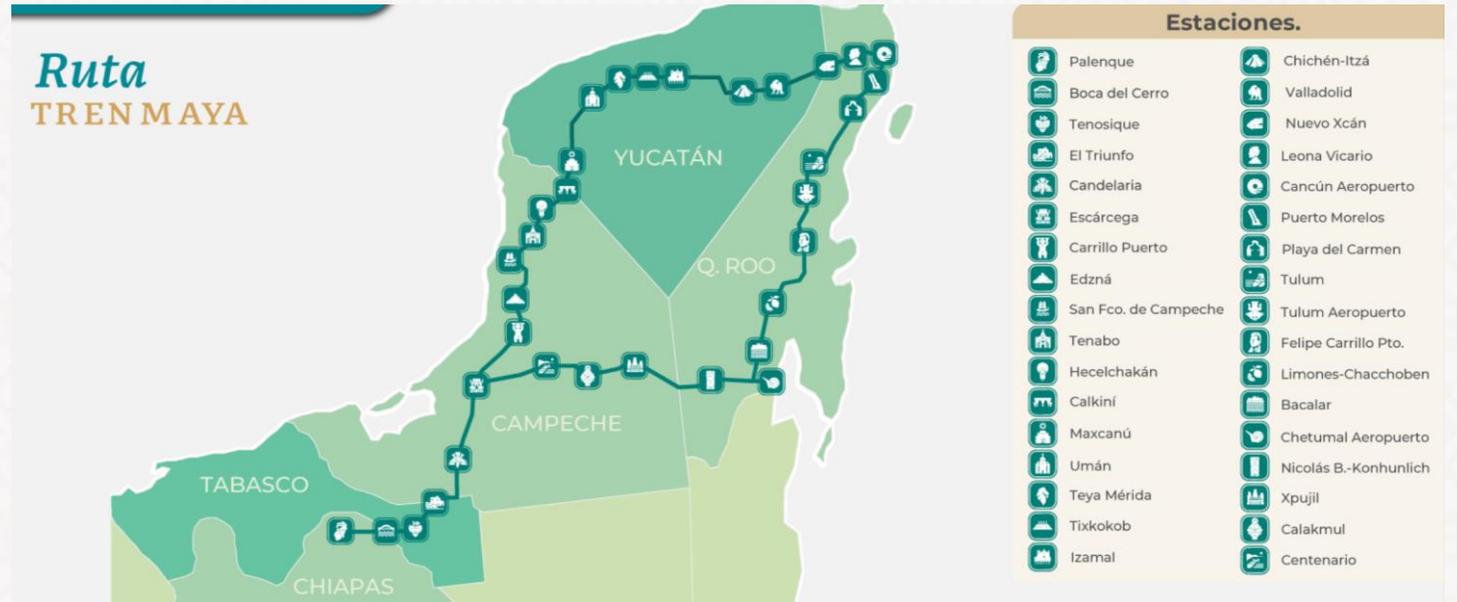


**TREN
MAYA**
TSÍMIN K'ÁAK

The Tren Maya provides an efficient and modern connection between the main cities and tourist areas. It has 8 stations, which provide a great connection to visit different attractions:

Maxcanú
Umán
Mérida
Tixkokob

Izamal
Chichén Itzá
Valladolid
Nuevo Xcán

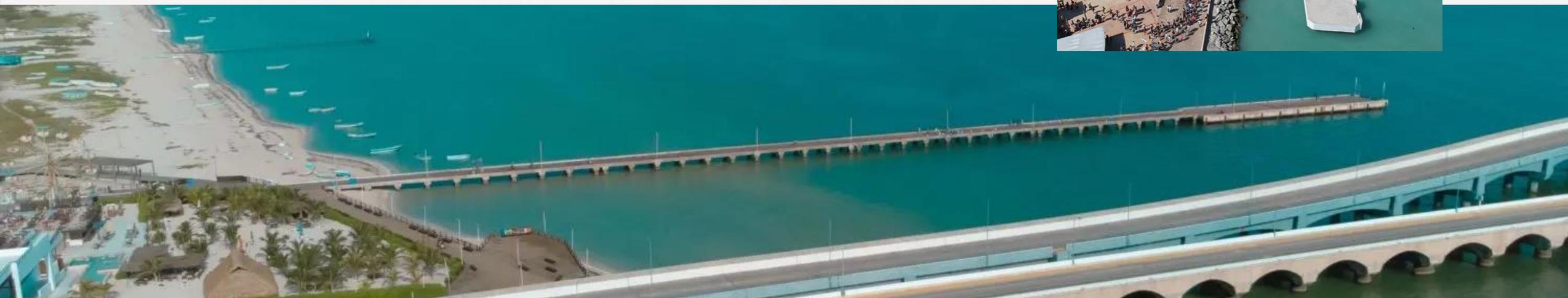
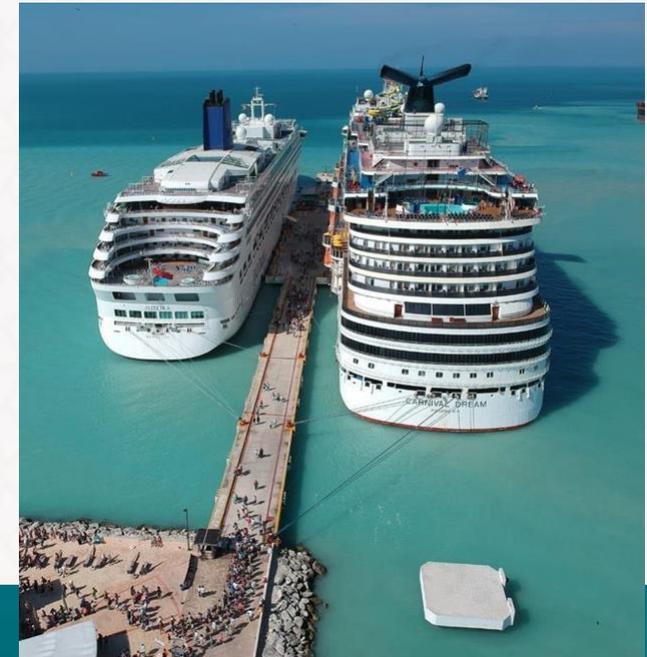


Port Infrastructure



The state has 7 international and 12 domestic routes, railway infrastructure through the Tren Maya and a deep-sea port capable of receiving ships with up to 40,000 tons of products and luxury cruise ships with up to 4,500 passengers.

In 2024, the port registered a cargo movement of more than 8 million 687 thousand tons and received 104 cruise ships with more than 317 thousand passengers.



Hotel Infrastructure

Yucatán



17,236



730

Mérida



10,597



280

Valladolid



1,729



99

Meetings and Convention Infrastructure

International Congress Center - CIC

Within the available infrastructure, there are meeting tourism oriented spaces, such as the International Congress Center, which has more than 10,000 m² of meeting rooms for the organization of events.



Siglo XXI Convention Center

Venue for fairs and exhibitions, with ample areas for conventions and events, it has 23,000 M2 of total construction.

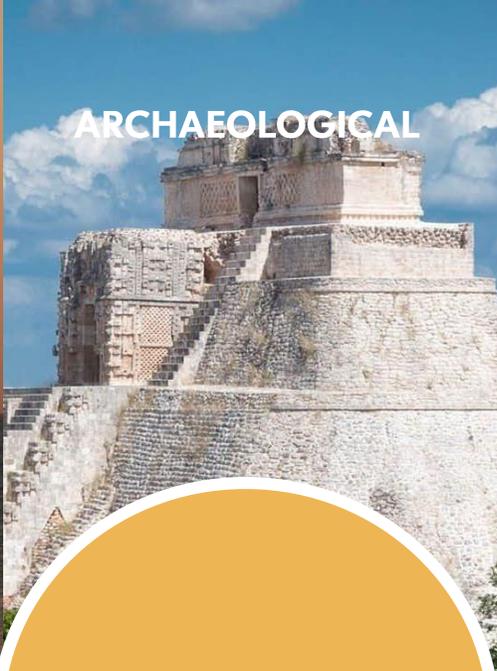




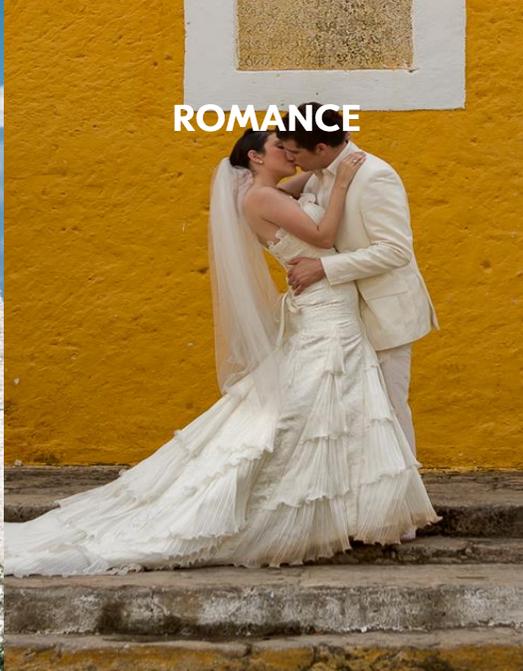
LUXURY



SPORTS



ARCHAEOLOGICAL



ROMANCE



SUN AND BEACH



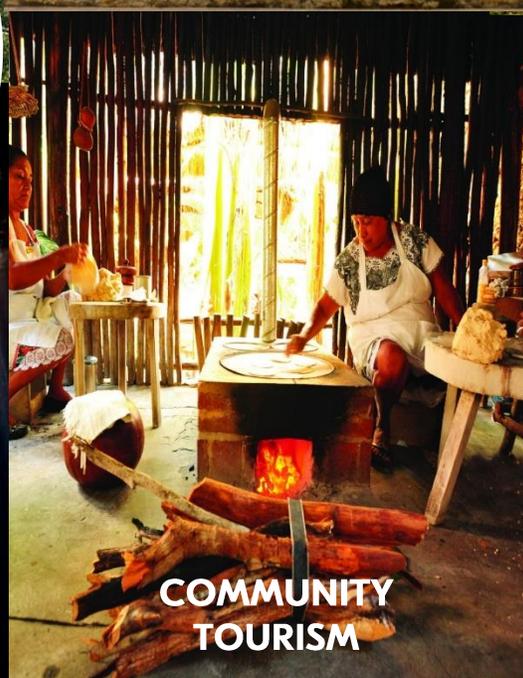
CULTURAL



WELLNESS



ADVENTURE AND NATURA



COMMUNITY TOURISM



GASTRONOMY

Tourism offer

Destination demand at the national and international level

Survey Jan - Mar 2025



| | México 54.7% | | EUA 18.6% | | Europe 16.8% | |
|------------|-------------------------|-------------|-------------------|-------------|---------------------------|-------------|
| Top | Mexican States | | EUA States | | European Countries | |
| 1 | Quintana Roo | 16.2 | Texas | 25.7 | Francia | 22.3 |
| 2 | Ciudad de México | 12.8 | Florida | 22.8 | Inglaterra | 20.8 |
| 3 | Estado de México | 11.8 | California | 7.4 | Alemania | 16.9 |
| 4 | Campeche | 6.8 | Illinois | 5.1 | Holanda | 6.2 |
| 5 | Veracruz | 6.3 | Washington | 4.4 | Italia | 6.2 |
| 6 | Jalisco | 5.1 | New York | 3.7 | España | 5.4 |
| 7 | Tabasco | 4.6 | Wisconsin | 2.9 | Dinamarca | 4.6 |
| 8 | Nuevo León | 4.3 | Colorado | 2.2 | Suecia | 4.6 |
| 9 | Querétaro | 4.1 | Utah | 2.2 | Austria | 3.8 |
| 10 | Yucatán | 3.9 | Arizona | 2.2 | Suiza | 3.1 |

Main reason for traveling to Yucatán

Survey Sept - Dec 2024 Vs. Jan - Mar



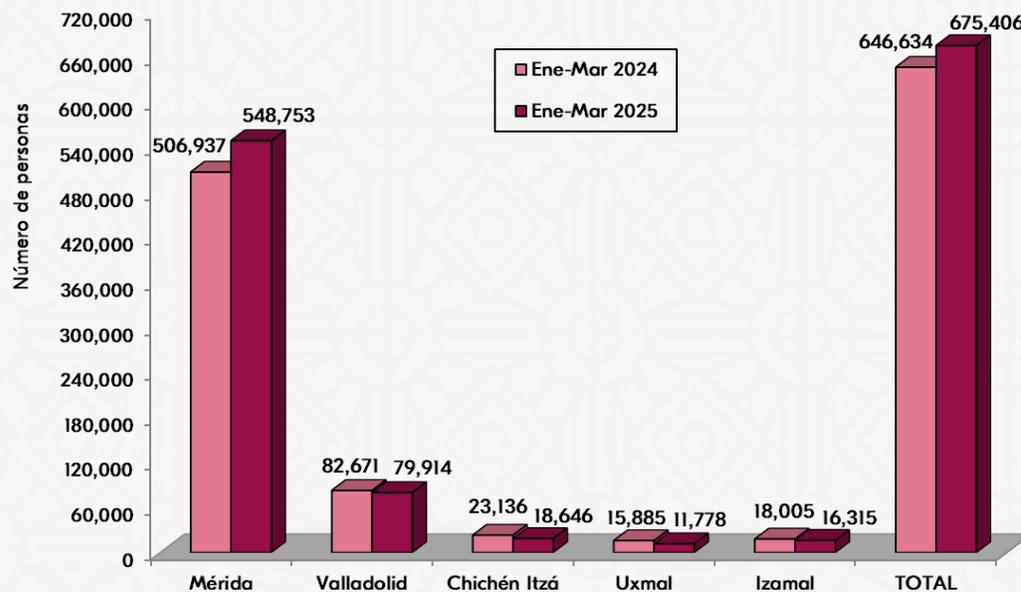
| | Q4 2024 | Q1 2025 |
|------------------------------|--------------------|--------------------|
| Explore / Get to know | 66.6 | 53.1 |
| Sun and Beach | 8.9 | 15.8 |
| Wedding | 4.9 | 6.3 |
| Culture | 6.8 | 5.6 |
| Fsmily | 4.9 | 3.6 |
| Congress / Convention | 0.9 | 3.4 |
| Business / Work | | 2.9 |
| Honeymoon | 2.9 | 2.7 |
| Wellness | 0.6 | 2.7 |
| Gastronomy | 2.8 | 1.9 |
| Health | | 1.4 |
| Incentive Travel | 0.7 | 0.5 |

Tourist Arrivals to the State (Accumulated)



OVERNIGHT TOURIST ARRIVALS IN LODGING ESTABLISHMENTS IN THE STATE'S MAIN TOURIST CENTERS DURING JANUARY-MARCH 2025

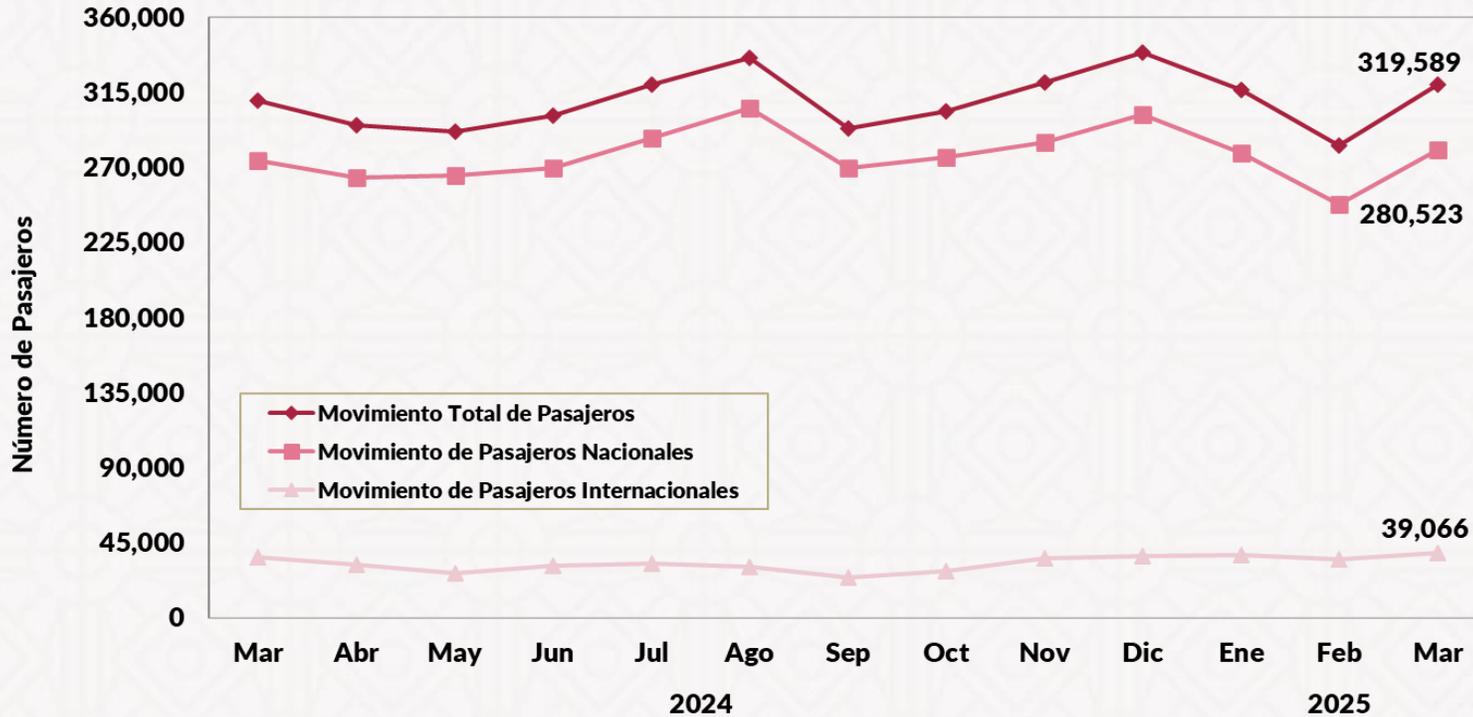
| TOURIST CENTER | DOMESTIC TOURISTS | FOREIGN TOURISTS | TOTAL TOURISTS |
|----------------|-------------------|------------------|----------------|
| Mérida | 433,599 | 115,154 | 548,753 |
| Valladolid | 57,670 | 22,244 | 79,914 |
| Chichen Itzá | 6,323 | 12,323 | 18,646 |
| Uxmal | 7,835 | 3,943 | 11,778 |
| Izamal | 11,749 | 4,566 | 16,315 |
| TOTAL | 517,176 | 158,230 | 675,406 |



- During the months of January-March 2025, the arrival of visitors to the main tourist centers in the state of Yucatan was 675,406 people, of which 76.6% corresponded to visitors of national origin and 23.4% to visitors of foreign origin.
- During January-March 2025, the city of Merida accounted for 81.2% of the total number of overnight visitors to the state, while Valladolid received 11.8% of the total number of such visitors.

Source: Ministry of Tourism of the State of Yucatan, based on the hotel monitoring system DataTur.

Accumulated Air Passenger Movement



- During **March 2025**, Merida City International Airport recorded a **total passenger movement (arrivals and departures) of 319,589 people**, representing an **increase of +3.0% passengers** compared to the same month in 2024.

Source: Grupo ASUR. Excludes transit and general aviation passengers.

| INDICATOR | ACCUMULATED JANUARY-MARCH | | ANNUAL VARIATION |
|------------|---------------------------|---------|------------------|
| | 2024 | 2025 | |
| Passengers | 900,233 | 919,117 | +2.1% |



Strategic location

Yucatán borders the Gulf of Mexico, has 378 km of beautiful beaches, and is adjacent to Campeche and Quintana Roo. Merida, the state capital, is the most developed business, financial, technology, medical and educational center in the southeast.



Safest state in Mexico

Yucatán is the safest state in the country, according to the National Insecurity Survey (ENSI). Our state has a much lower rate of insecurity than any other city or place in the Americas and even lower than several cities in the United States.



Labor stability and skilled labor

The State of Yucatan currently offers university technical programs, 221 undergraduate programs, 18 graduate programs and 100 postgraduate programs.



Port of Progreso for export and import.

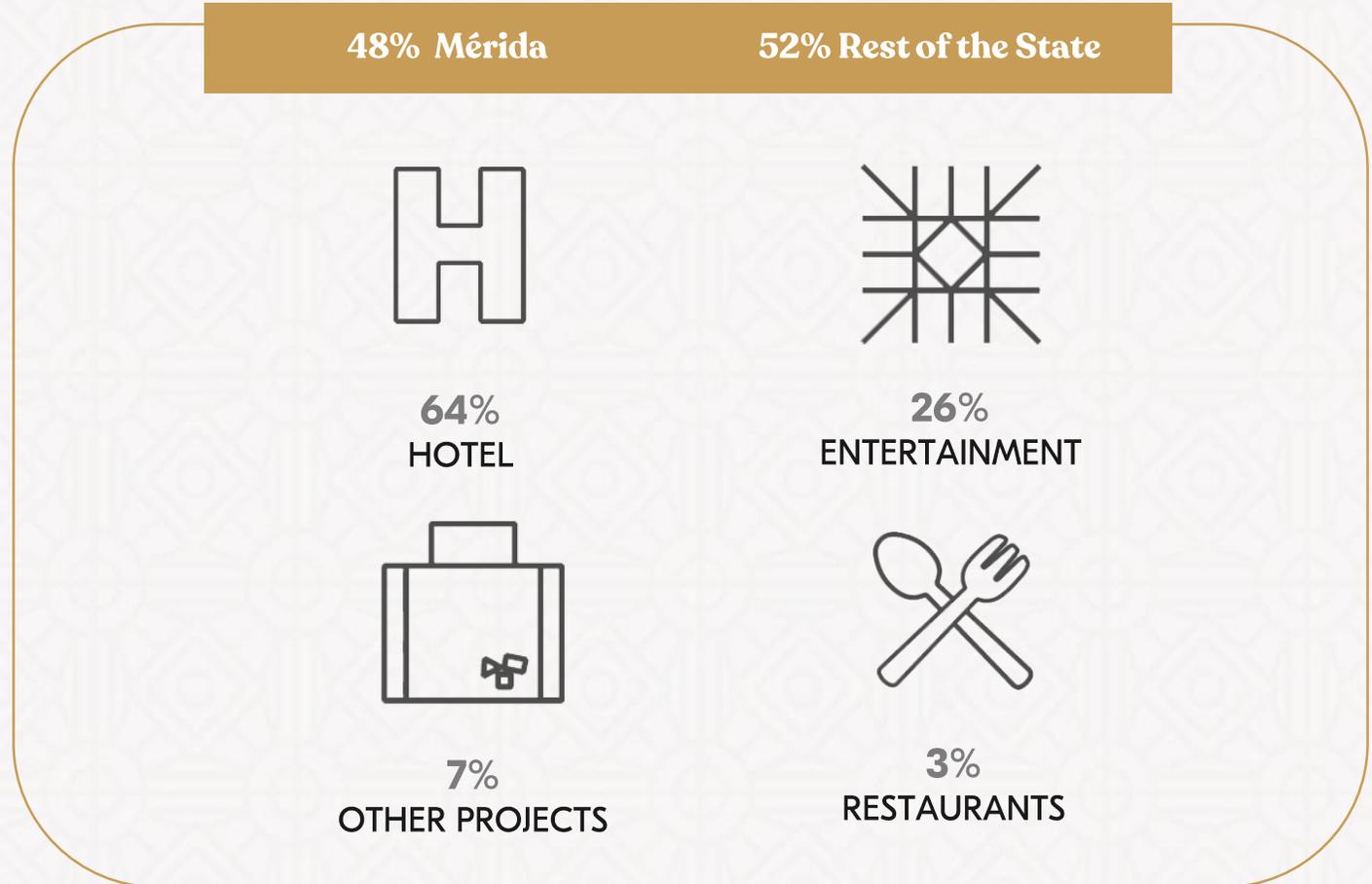
Progreso Port Terminal, which is the second largest port in the country, is a specialized cruise and ferry terminal.

Private tourism investment attraction



Accumulated private investment in Yucatán

2025



Source: SEFOTUR

Publica Investment



MAYAN TRAIN HOTELS

Amount of investment:
+76 MD



NEW UXMAL PARK

Amount of investment:
+33 MD



LA PLANCHA LARGE PARK

Amount of investment:
+66 MD



MAYAN TRAIN

Amount of investment:
+6,000 MD

Main Hotel Brands in Yucatán



Inauguration of new tourism investments

estimated operating investments of
+ 6 md



Ongoing Projects

2025 – 2028

- Hyatt Place Vía Montejo.
- Xibalbá – Grupo Xcaret.
- Mucuyché – Grupo Xcaret.
- Live Aqua Hotel – Grupo Posadas.
- Hacienda Katanchel Belmond.
- Six Senses Temozón.
- Hacienda Nayara Espita.
- Casona 59 by Chablé.
- Aantik hotel and restaurant shopping center.
- Victoria Colón Hotel.
- Sevilla Habita Hotel.
- Homewood suites by Hilton.
- Tivoli NH Hotel.
- Hotel Projects in Valladolid.



Hacienda Nayara



Hotel Arrivals in Valladolid



Hacienda Sanlahtah Resort & Spa



Hacienda Katanchel (Belmond)



New Restaurants in Mérida



New Boutique Hotels



YUCATAN

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