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SECRETARÍA PARA EL DESARROLLO
ECONÓMICO Y COMPETITIVIDAD



TABASCO

**INVESTMENTS
2020**

● USA and Canada
Houston



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TABASCO

● Central and South America
ASIA

Logistic

Tabasco reinforces its leadership in the Southeast region of México as the most efficient regional platform for logistics, distribution, commerce and services.

57

Regional Distribution Centers have selected Tabasco as an investment destination to establish their logistic center.

9

Industrial Parks with more than 4'000,000 m2 of available space.



Commerce



Industry



Services

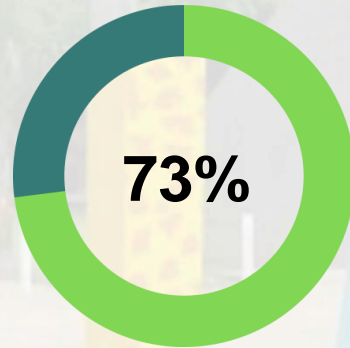


Gross Domestic Product

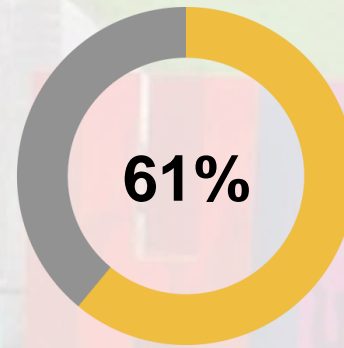
The Southeast region of Mexico, concentrates one of the most important economic activities:
Oil & Gas



The Energy Hub of Mexico



Tabasco and Campeche represent the highest percentage of Gross Domestic Product of Mining.



Participation of the Oil Industry in Tabasco's Gross Domestic Product.



42 Billions USD

420 New Jobs for the next 30 years.

*Of the 9 tenders assigned by the National Hydrocarbons Commission, **Tabasco was awarded 37 contracts** for both, onshore and off shore activities (shallow y Deep water) as well as farmout projects.*

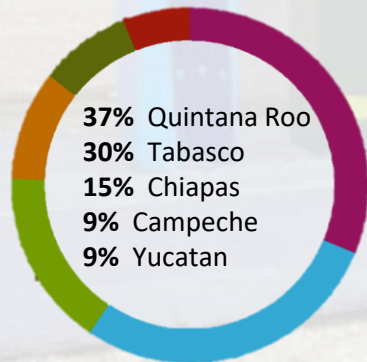
Foreign Investment 2019

Millions USD

Tabasco State accumulate one of the biggest amount of foreign investment within the states of southeastern México.

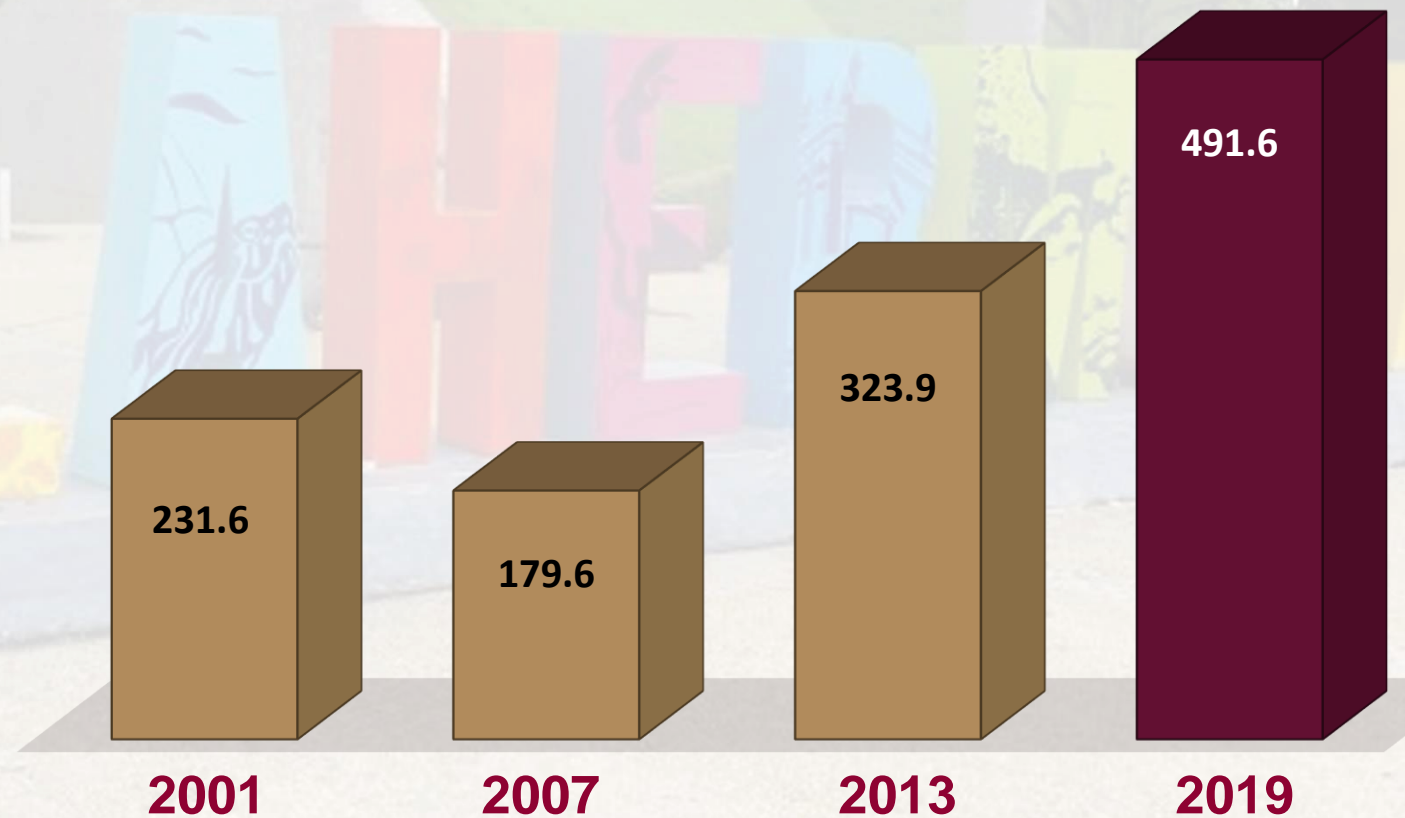
Tabasco
491.6 MD
30%

** The foreign direct investment of 2019 is taken from January to December.*



In 2018, Tabasco was the preferred destination for attracting foreign investment in the Southeast with 529.6 md.

FOREIGN DIRECT INVESTMENT ON FIRST YEAR FOR A NEW GOVERNMENT (2001-2019)



Source: Secretary of Economy, 2020.



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Potential Investments



Potential of Investment in Renewable Energy for the next 5 years

3.7% T.A.

Annual Rate Increase 2013-2028,
according to Electric Prospective

186 MDD

Tax Revenue

15,685

New Jobs

2000 MDD

Contribution to PNB

1980 MW

Potential to Develop



Fuente: Price Waterhouse Coopers.

Potential of Investment in Renewable Energy for the next 5 years

Biomass Potential
ecological, agricultural, livestock and residual.

Tabasco has a potential of 80 MW.

Hydraulic Potential
The greatest hydraulic power in the country. Almost 1 GW.

10% National Operation.

Solar Potential
possibility to cover the total of electric demand by photovoltaics cells; taking only the 5,5% of the solar potential.

3% Territory

Wind Potential
1.500 MW to be develop.

Load factor up to 25%, to cover only **10% of the demand within Tabasco.**

Bioenergetics
Potential 23 million liters of petroleum a year.

Biodiesel between 23 and 25 million liters per year average cost of raw material is \$ 43 USD.

Current Commercial Investments



SEGALMEX, Milk Processing Facility, and
3 collection centers.

Investment amount: USD 15 million

Jobs Created: 300



PASCUAL BOING, Beverages Facility.

Investment amount: USD 12 million

Jobs Created: 350



WALMART, Retail Center for Southeast
Mexico.

Investment amount: USD 90 million

Jobs Created: 840

Federation Projects



DOS BOCAS REFINERY, 340 thousand barrels per day.

Investment amount: USD 8 billion

Jobs Created: 23 thousand



MAYA TRAIN, 1,460 km. railways through southeast.

Investment amount: USD 7 billion

Jobs Created: 10 thousand



INTEROCEANIC CORRIDOR, Logistic platform connecting Pacific Ocean throughh Gulf of Mexico.

Multi-modal Carriage.

Project release: March, 2020

Natural Gas Distribution

The Ministry of Economic Development is conducting negotiations to establish industrial and domestic use for natural gas in Tabasco.

500

A

800

Million of cubic feet available by establishing a ship-to-ship bunkering at **Dos Bocas Port**.

Million of cubic feet available by customizing the **Cempola** station using SISTRANGAS pipelines to Southeast.



Fuente: CENAGAS, 2019



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Electricity Generation

Using Natural Gas as Raw Material



The fourth facility will generate 200 MW.

- Private Investors.
- Investment amount: USD 250 million.

Natural Gas requirements: 50 MMpcd per day

Infrastructure

Dos Bocas Port

It is located 82 km from Villahermosa, with preferential vocation related to **O&G and commercial**. Total area 18,196.11 ha, land área 158.74.

In 2018, Dos Bocas was the port with more cargoes in the country to several international destinations.

New Frontera Port

The government has available lands (311 ha). The main purpose of this port will be O&G, commercial, bulk and energetic. It is projected to start operations in 3 years.



Infrastructure

International Airport of Villahermosa

95 km from Dos Bocas Port. It has commercial flights, cargo operations and customs clearance.



Connectivity to the most important cities of México.



12 tons of cargo are handled daily on 6 flights. (Estafeta, TSM-DHL, MCS and Aerocarga).



The largest plane that can land is a 757-200.



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Infrastructure Highways

10,642 km

Highways of Tabasco

43.2 km

Highways for each 100
km², we are above the
national average.

Source: INEGI, 2018



Infrastructure Railway

300.2 km

Railways

264.85 km

Route Mérida - Coatzacoalcos

2 Stations

Teapa and Chontalpa Station

*Future Connection with
The interoceanic train.*



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Investment Opportunities



Railways

Construction of the
route Station Chontalpa
– Dos Bocas.

97 km of railway rights
available.



Internet Connectivity

High Speed Internet
and efficient
communications.



New Convention Center Villahermosa.



Frontera Port

Cargo, Oil & Gas,
Tourism.



Renewable Energy Projects



Agro business



New Central Market



Forest Development



Natural Gas Distribution



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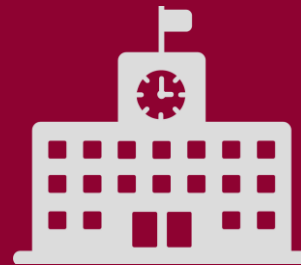
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Human Resources and Training



Skilled Labor.

45 Universities, Technical Schools and Training Centers specialized in industry, O&G, agriculture and business.
(Innovation área SEDEC, 2018)



The Autonomous Juárez University of Tabasco is building the “Knowledge City” that will become a center of **innovation and development** at service of business sector.



Government Programs
Created for recruitment and staff training.



The active economic population is **1,007,591**.
(INEGI 3T 2018)

Incentives for investors



State Tax

Payroll tax reimbursement.



Labor

Training Programs using State agencies.



Cash



- ✓ Acquisition of Infrastructure and estate.
- ✓ Construction of Infrastructure.
- ✓ Rehabilitation of Infrastructure.
- ✓ Urbanization Works.



Others

Regulatory Improvement: in 2018, Tabasco improved its score by 64% compared to 2017.



Why invest in Tabasco



Best Political Environment to do business throughout the country.



Skilled Labor, recruitment programs and training.



Most developed logistic infrastructure in the Southeast of México.



Linkage: Science and Technology, Real State Agencies, Legal Consultancy, Mexican Chamber of the Construction Industry, Industrial Parks, Constitution of Companies, Telecommunications, Human Resources, Safety, HSE



Special Incentives for important investment projects.



The government provides **accompaniment and management** for soft-landing and aftercare.



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Investment Opportunities



#ConsumeLocal

Esencia Tabasco



Brand that promotes products and services of the region.

- ✓ State Quality Distinctive.
- ✓ Activates the economy of the state.
- ✓ National and International Impact.
- ✓ Preserve the essence that defines the region.

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