



TABASCO



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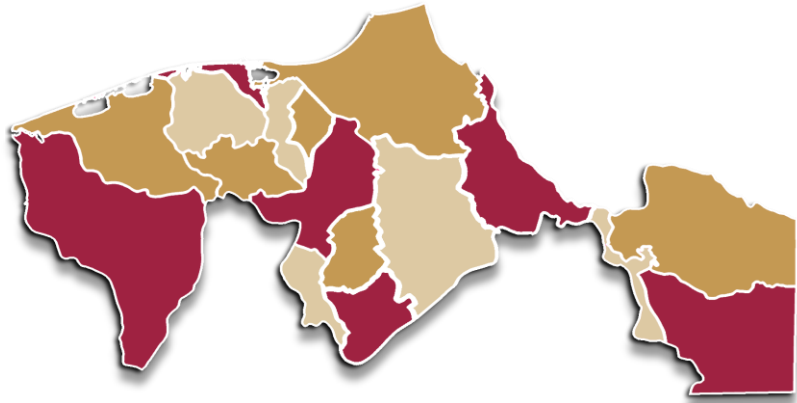
The Engine of the *Future*

INVESTMENTS AND BUSINESS OPPORTUNITIES

2024



LOCATION



TABASCO

is located in the Southeast of Mexico and stretches from the coastal plain of the Gulf of Mexico. It has an area of 25,470 km², which represents 1.3% of the country's surface area.

17 Municipalities

5 Regions

Villahermosa Capital City



2,475,236
POPULATION





DATA TABASCO

\$31,965.04 USD Million in
Gross Domestic Product 2022
17% annual growth
(compared to 2021)

**32.31% increase in Net
Jobs for the period
2018 - 2024**

Annualized
Economic Activity
Decrease of -2.3% in
Q1 2024

USD +11,251 M of
exports during 2022

USA, Canada, China, Singapore, UK

1st place in real growth
rate in the last three
years (2023)

USD 1,991 M Foreign
Direct Investment
(2019 - Q2 2024)

USA, UK, Australia, Spain, Argentina

WHY INVEST IN TABASCO?



INCENTIVES

- ❖ Tax incentives for the Value Added Tax (VAT) from 16% to 8% and Income Tax (ISR) from 30% to 20% in the municipalities of Balancan and Tenosique
- ❖ Funding to support new investments
- ❖ Strategic Fiscalized Zone
- ❖ Subsidies for training
- ❖ Payroll incentives
- ❖ Job Board
- ❖ Local supply chain
- ❖ Availability of land

LEGAL FRAMEWORK

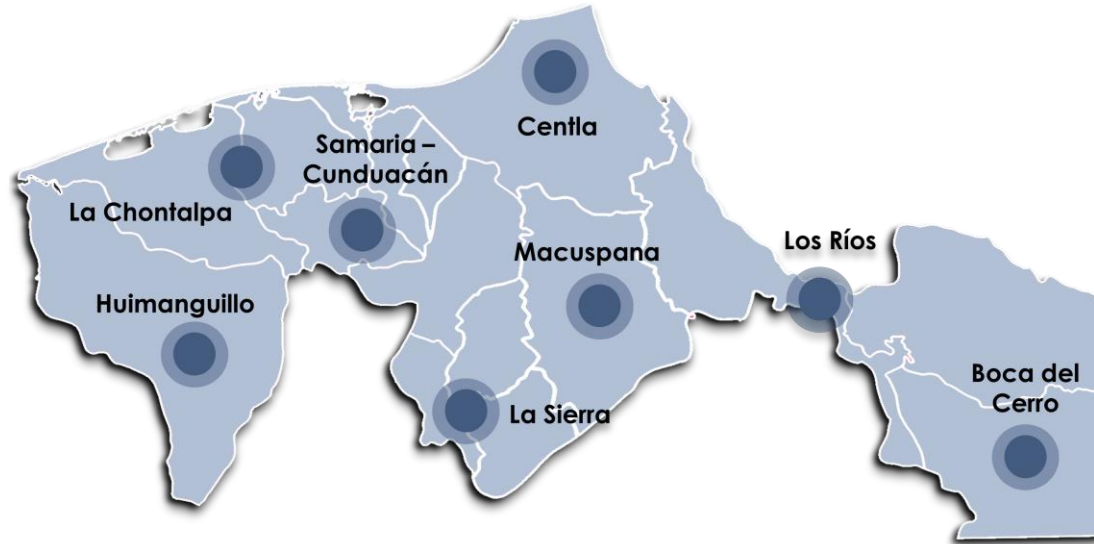
- ❖ Permits.
- ❖ Business legal advisory
- ❖ Close relationship between federal, state, and municipal governments.
- ❖ Legal certainty and security climate for investment attraction
- ❖ Labor peace
- ❖ International Customs and Availability of Customs Agents

CONCIERGE

- ❖ Accompaniment and advice for Soft-landing and Aftercare
- ❖ One-stop shop for business and investments (new businesses, cost reduction, and streamlining bureaucratic procedures)
- ❖ Customs services in the state
- ❖ Available workforce
- ❖ Logistics and connectivity

WATER AND ENERGY SUPPLY

TABASCO concentrates approximately **35%** of the country's freshwater resources



- **29,800** ha of coastal lagoons
- **110,000** ha of inland waters
- **4,000** km of rivers

GROUNDWATER / AQUIFERS



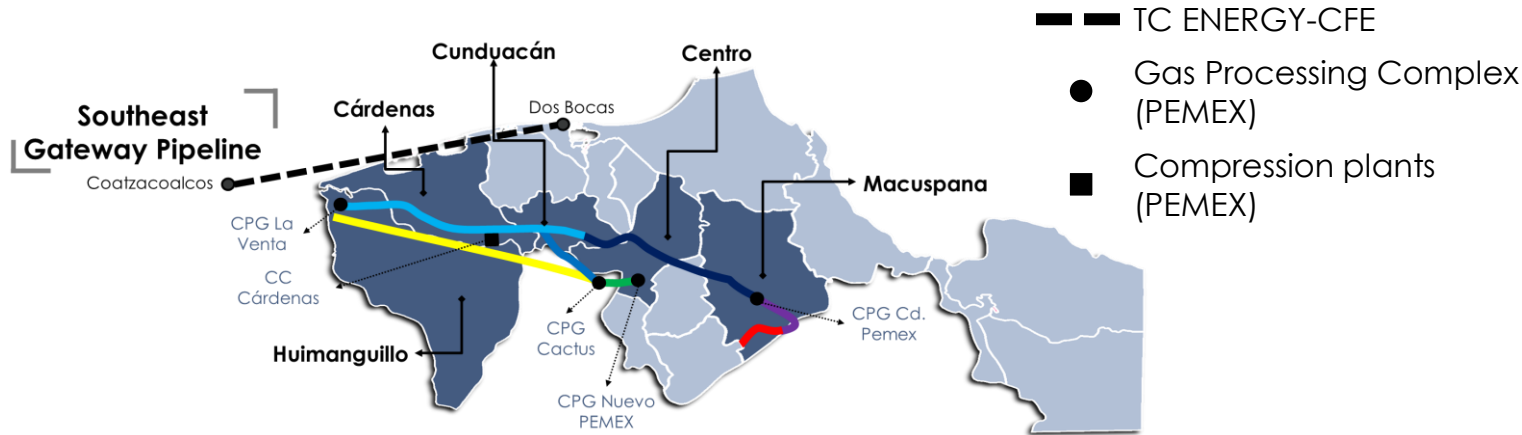
Energy Cogeneration Factory - A3T

- Produces 230 megawatts of electricity at a low-cost.



NATURAL GAS

AVAILABLE NATURAL GAS INFRASTRUCTURE – SISTRANGAS AND NEW PIPELINES PROJECTS



Tabasco concentrates the most important injection points that supply the SISTRANGAS:

- Ciudad Pemex
- Nuevo Pemex
- La Venta

Cactus Gas Processing Complex

Coming soon: Dos Bocas

These 5 municipalities concentrates the 64% of economic units.

| Color | D.N. (in) | Name | Available Capacity (Mmpcd) |
|---|-----------|-----------------------------|----------------------------|
| Red | 10 | Alcalde M - Cementos Apasco | 9 |
| Purple | 16 | Cd. Pemex - Alcalde Mayor | 9 |
| Dark Blue | 24 | Cd. Pemex - El Misterio L2 | 50 |
| Light Blue | 24 | Cd. Pemex - N. Teapa L1 | 0 |
| Green | 30 | Nuevo Pemex - EM Cactus | 50 |
| Light Green | 36 | Cactus - El Misterio | 200 |
| Yellow | 48 | Cactus - San Fernando | |
| Availability of 318 Million cubic feet per day | | | |
| Gateway to the Southeast's capacity to transport 1,300 Mmpcd (2025) | | | |

Average Natural Gas Demand 2022 - 2025 (MMpcd)

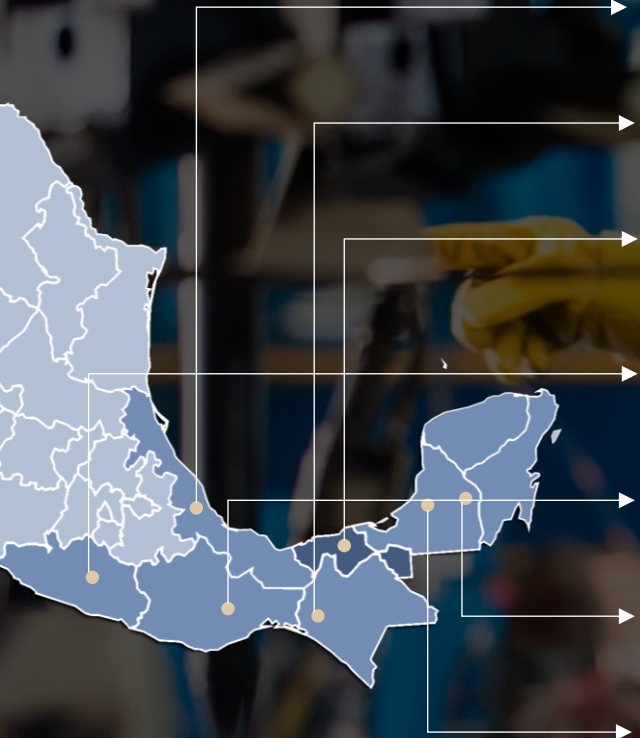
| YEAR | DEMAND |
|---------|--------|
| 2022 | 4.30 |
| 2023 | 5.05 |
| 2024 | 5.73 |
| 2025 | 6.38 |
| Average | 5.39 |

Note: Available capacity may vary with the introduction of new projects.



HUMAN TALENT

South – southeast 2021 - 2022



Veracruz:
23K graduates

Chiapas:
9K graduates

Tabasco:
8K graduates

Guerrero:
7K graduates

Oaxaca:
7K graduates

Yucatán:
6K graduates

Campeche:
3K graduates

Quintana Roo:
3K graduates

TABASCO has a SKILLED WORKFORCE IN HIGH-PERFORMANCE INDUSTRY.

62 COLLEGE
EDUCATION INSTITUTIONS

16 Public Universities
10 Technological
Institutes

28 Private Universities
6 Research Centers



TABASCO

Federal Investment Center

MAIN PROJECTS

United States
of America

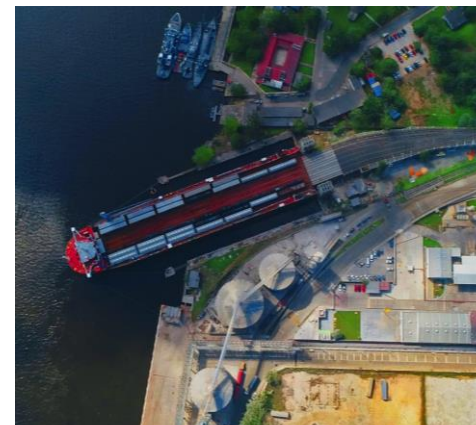


OLMECCA REFINERY

340,000 barrels per day.
Investment amount: USD 8 billion.
Jobs created: 23,000
Investment of 11,650 Million Pesos
(Forbes data)

MAYA TRAIN

1,460 km of railway lines in the southeast.
Investment amount: USD 7 billion.
Jobs created: 10,000
Total estimated investment by 2024 of
480 Million Pesos

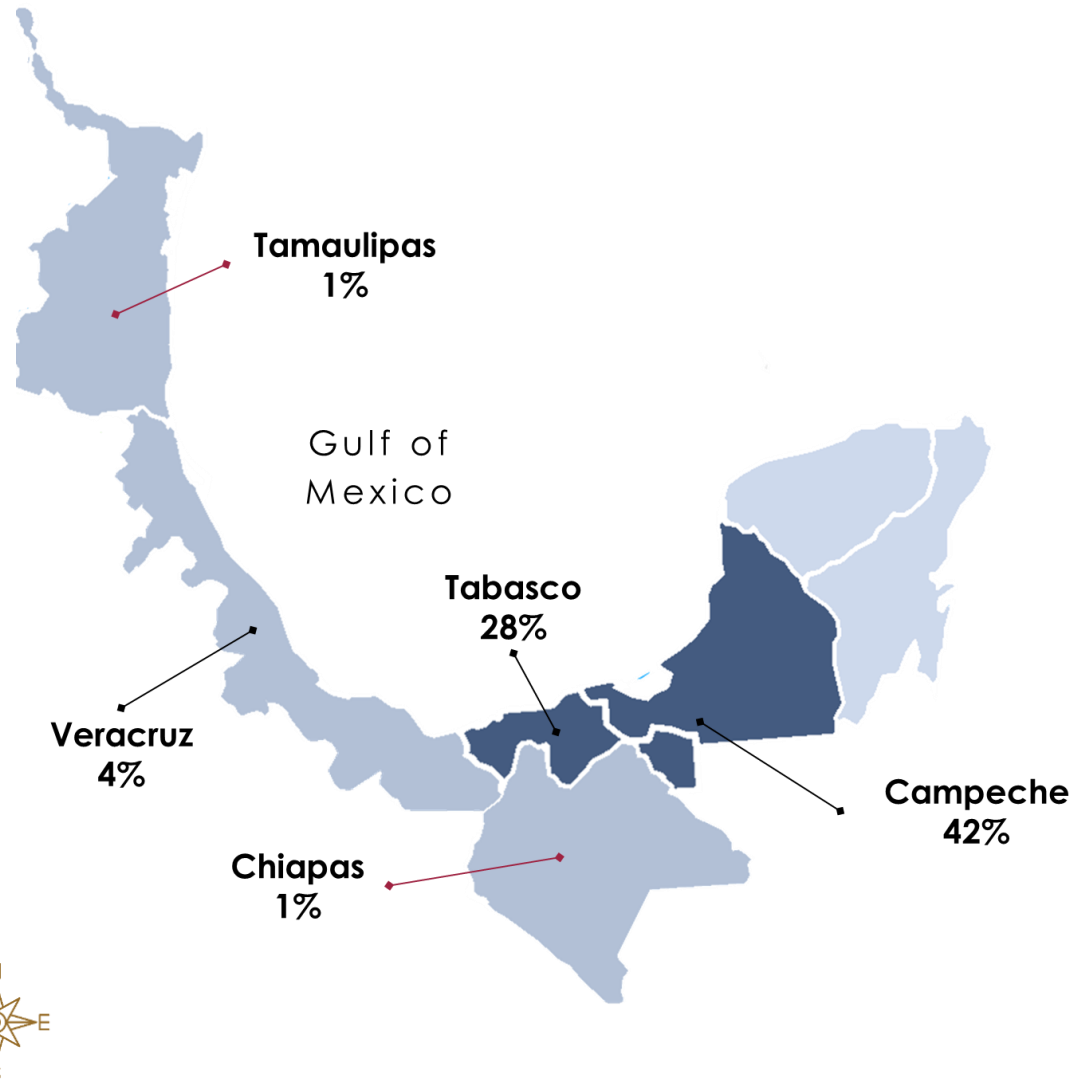


INTEROCEANIC CORRIDOR

Logistics platform connecting the
Pacific Ocean and the Gulf of
Mexico. Multimodal logistics.
Intention to install 4.5 billion dollars
(Forbes)



THE ENERGY HUB OF MEXICO



PROJECTED INVESTMENT IN OIL AND GAS

86% OF THE TOTAL INVESTMENT IS CONCENTRATED IN 3 SOUTHEASTERN STATES:

- **Campeche**
- **Tabasco**
- **Veracruz**

Tabasco was awarded 37 contracts for activities onshore, offshore (shallow and deep waters), and "farmout" projects.

TABASCO & CAMPECHE REPRESENT

70%

OF THE **GDP FROM OIL MINING**, THE HIGHEST PERCENTAGE IN THE COUNTRY.

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





PORT INFRASTRUCTURE

Dos Bocas Port

- ❖ Total area: 70 hectares
- ❖ Located 82 km from Villahermosa

Frontera Port

- ❖ Located in Centla, on the Grijalva riverside
- ❖ O&G is its core business besides commercial and fishing in small scale

NEW PORT TERMINAL

- ❖ Total area: 22 hectares
- ❖ Predominantly dedicated to activities related to Oil & Gas and small-scale commercial operation





AIR INFRASTRUCTURE



9 daily flights to
CDMX



Connectivity to the
most important cities of
Mexico

- ❖ The largest plane that can land is a 757-200.
- ❖ Connection of flight network to major cities.
- ❖ The airport is located 95 km from the port of Dos Bocas. It handles commercial flights, cargo operations, tax customs and a heliport
- ❖ 14 tons of cargo handled daily on 6 flights. (Estafeta, TSM, DHL, MCS, Aeromexico and Aerocarga)





USMCA CORRIDOR

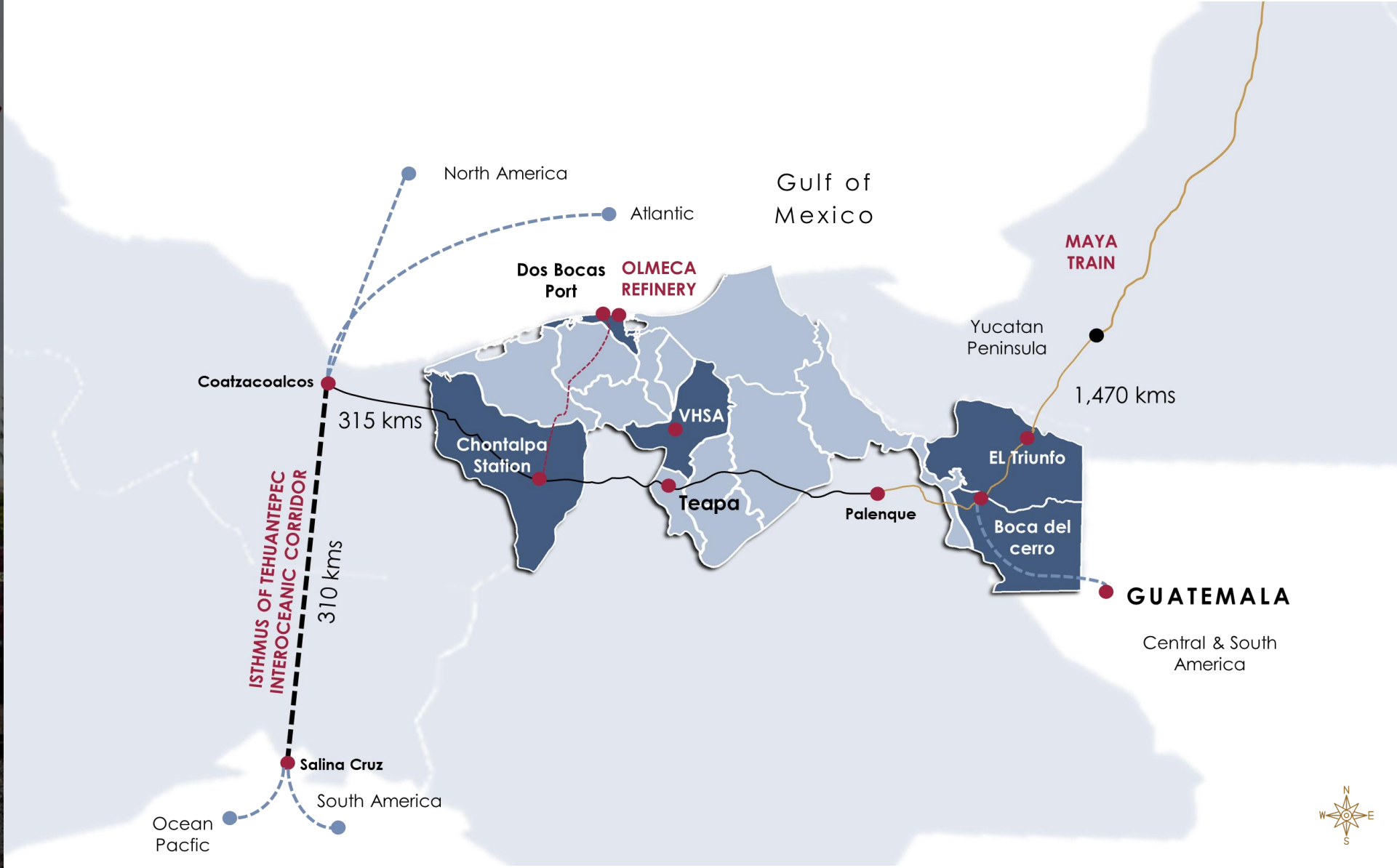
+ 320 km Railways

4 Stations:

- Chontalpa
- Boca del Cerro
- Teapa
- El Triunfo

Right of railway
Chontalpa Station - Dos
Bocas 94 km

RAILWAY INFRASTRUCTURE



CURRENT PROJECTS



New milling at the Holcim Mexico Production factory in the municipality of Macuspana, to supply the southeastern states



New Tier 1 production factory for electrical harnesses for the automotive industry, located in the municipality of Conduacan



Construction of a submarine pipeline "Gateway to the Southeast" that will transport natural gas from Tuxpan to delivery points in Coatzacoalcos, Veracruz, and Paraíso, Tabasco"



New Ecological factory in Tabasco by the company ALPLA, for PET recycling, for the manufacture of containers, located in the municipality of Conduacan



New Project Cuxtal II, a gas pipeline that will pass through the states of Tabasco, Chiapas, Campeche, and Yucatán. It will involve the construction of nearly 700 kilometers of pipelines and three conversion stations.



Development Hubs

Geographical spaces for industrial developments in Tabasco, with the benefits and incentives of the Interoceanic Corridor of the Isthmus of Tehuantepec

LOGISTIC PARK



NEW PORT TERMINAL



DIGITAL CONECTIVITY



ENERGY INDUSTRY



**POTENTIAL
INVESTMENT
PROJECTS**

AUTOMOTIVE INDUSTRY



FOOD INDUSTRY



EDUCATION 5.0



INDUSTRIAL PARK



INVESTMENT OPPORTUNITIES



Innovation

- ❖ ICTs
- ❖ E-Commerce
- ❖ Connectivity
- ❖ Digital and Electronic
- ❖ Automation
- ❖ Artificial intelligence



Industry

- ❖ Automotive
- ❖ Electromobility
- ❖ Semiconductors
- ❖ Metal mechanics
- ❖ Chemistry
- ❖ Biomass
- ❖ Industrial Park
- ❖ Textile
- ❖ High Water Consumption



Energy

- ❖ Petrochemical
- ❖ Oil and Natural Gas
- ❖ Biofuel
- ❖ Cogeneration Plant
- ❖ Hydrogen



Agribusiness

- ❖ Food Processing
- ❖ Agro-ships
- ❖ Forest Plantations
- ❖ Agricultural Product Packing Plants
- ❖ Increasing Potential Crops in Sub-regions
- ❖ Aquaculture

NEARSHORING

INFORMATIVE BROCHURE



AND LAST BUT
NOT LEAST...

Tabasco is well known
for great gastronomy, natural
wonders & quality of life





SEDEC

SECRETARÍA PARA EL DESARROLLO
ECONÓMICO Y COMPETITIVIDAD

ING. JOSÉ FRIEDRICH GARCÍA MALLITZ

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