

# Strategic Plan for the Industrial Development of the State of Tabasco, 2024-2044

EXECUTIVE SUMMARY





**TABASCO**

Strategic Plan for the Industrial Development of the State of Tabasco, 2024-2044  
Gobierno del Estado de Tabasco, 2024

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# Strategic Plan for the Industrial Development of the State of Tabasco, 2024-2044

## Executive summary

The 2024-2044 Strategic Plan for the Industrial Development of the State of Tabasco presents the actions to be taken by the Government of the State of Tabasco to achieve a long-term vision for sustainable and inclusive industrial development over the next twenty years. This strategic plan is an initiative of the State Government, as established in Article 76 of the Political Constitution of the Free and Sovereign State of Tabasco which assigns to the State Government the responsibility to lead the preparation and development of the State Development Plan (PLED, by its acronym in Spanish) and its related documents, such as the Sector Programme for Economic Development and Competitiveness 2019-2024 and the Regional Programme for Economic Integration of the South-Southeast Region 2019-2024.

The preparation of the Strategic Plan has been led by the State Government, with the collaboration of the United Nations Industrial Development Organization (UNIDO) and the Government of Italy. This plan results from an extensive statistical and documentary analysis and an inclusive and participatory process that allowed diverse perspectives to be incorporated. The plan reflects the consensus reached among key local stakeholders from a variety of productive sectors. As a whole, stakeholders from more than 30 different organizations were consulted.

The Strategic Plan recognises that the state of Tabasco is rich in natural resources, from its abundant water supplies and fertile soils to its oil wealth. These conditions have favoured the development of economic activities such as the petrochemical industry, agriculture, forestry and fishing production, and agribusiness. However, the concentration of efforts in these areas has limited opportunities to promote economic diversification and has restricted the growth of other productive capacities and innovation in the state.

In 2022, manufacturing contributed 4.1% of the state's gross domestic product (GDP). This figure suggests that manufacturing is underrepresented in the state compared to its share of the national economy (21.5%). This limited manufacturing base is reflected in (a) the relatively high concentration of the labour force in low value-added services with less competitive wages, and (b) the relatively low contribution of Tabasco's micro, small, and medium-sized enterprises (MSMs) to production and investment (Figure 1).<sup>1</sup>

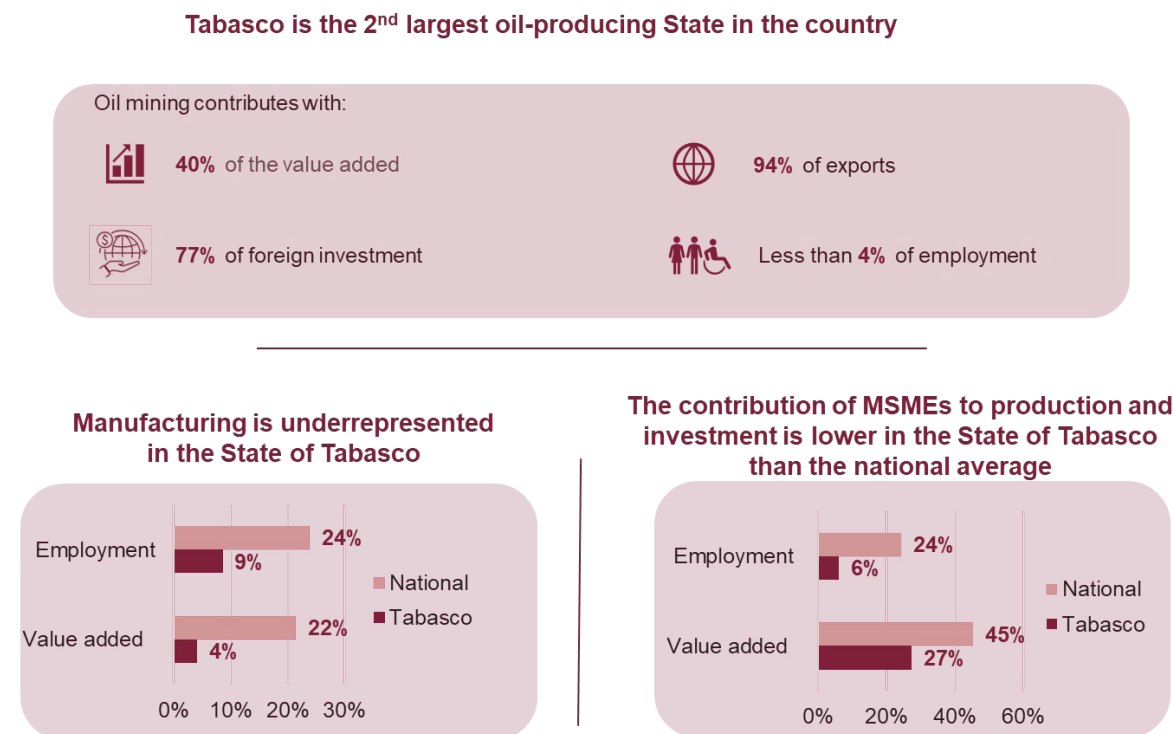
From a long-term development perspective, the state of Tabasco needs to increase its commitment and resource allocation to realise the potential economic benefits derived from the manufacturing sector. Manufacturing tends to have higher productivity levels than sectors such as agriculture and labour-intensive services. In addition, the manufacturing sector has strong bonds with other areas of

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<sup>1</sup> Government of the State of Tabasco - UNIDO (2024). *Diagnosis of Capacities and Opportunities for the Long-Term Industrial Development of the State of Tabasco*. Report prepared by Cambridge Industrial Innovation Policy. University of Cambridge.

the economy. In Tabasco, for every peso generated in manufacturing production, an additional 1.79 pesos are generated in other sectors.<sup>2</sup>

**Figure 1.** Tabasco's economy in the national context.



Source: INEGI. National Accounts System of Mexico and Economic Census 2019.

This document indicates the commitment of the various stakeholders in the state of Tabasco to accelerate its industrial development. All the stakeholders recognise the central role that manufacturing plays in creating productive investment opportunities and economic growth to support the prosperity of various regions and nations.

### A long-term vision for sustainable and inclusive industrial development

In considering the role of industrial policy to achieve the long term vision for sustainable and inclusive industrial development the Strategic Plan takes into account the challenges that may arise from global processes such as climate change, geopolitical tensions, and the rapid advance of digital transformation.<sup>3</sup> Likewise, the strategic plan highlights the importance of analysing the risks and opportunities in relation to the relocation of investments, and the reorganisation of global value chains (so called near-shoring), as well as those derived from investment projects in industrial infrastructure carried out by the Federal Government in the South-Southeast region. Initiatives such as the Inter-

<sup>2</sup> Simple multipliers calculated from data from the National Institute of Statistics and Geography, INEGI (2022). *Multi-State Input-Output Matrices*. Total transactions. Tabasco Experimental Statistics. Base year 2013.

<sup>3</sup> United Nations Industrial Development Organisation, UNIDO (2024). *Industrial Development Report 2024*. Summary. Vienna.

Oceanic Corridor of the Isthmus of Tehuantepec, the Mayan Train, and the Olmeca Refinery create new development opportunities for the state of Tabasco that require long-term vision, coordinated actions and investments that transcend six-year administrative changes.

An inclusive approach to industrial policy can translate into a process of industrial development that contributes to closing social, economic, and territorial gaps. Despite progress, women remain underrepresented in the most advanced economic sectors and leadership roles.<sup>4</sup> At the same time, the indigenous and Afro-descendant population has benefited to a lesser extent from development in Tabasco, as in the rest of the country.<sup>5</sup>

In Tabasco, the economic activity is mainly concentrated in Cárdenas, Centro, and Paraíso municipalities. Together, these municipalities account for 52% of the economic units, 66% of the employed personnel, and 95% of the value added in the state of Tabasco.<sup>6</sup> This concentration highlights the need for a decentralised territorial development approach to boost industrial activities across the state in the future.

In this context, the Government of the State of Tabasco, in collaboration with the private sector and academia through the Secretariat for Economic Development and Competitiveness (SEDEC), has defined a vision for a sustainable and inclusive industrial development for Tabasco towards 2044. This collaborative effort ensures that all stakeholders are part of the solution, fostering a sense of inclusion and shared responsibility.

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## **Tabasco Vision 2044**

*Tabasco is a competitive state and a leader in industrial innovation. Its diversified, export-oriented, and sustainable productive base generates quality jobs and opportunities for all sectors of the population and regions of the state.*

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## **Pillars, strategic projects, and priority sectors to make Vision 2044 a reality**

Along with the long-term vision for Tabasco's industrial development, the Strategic Plan for the Industrial Development of the State of Tabasco 2024-2044 defines short medium, and long-term objectives and specific initiatives to make Vision 2044 a reality.

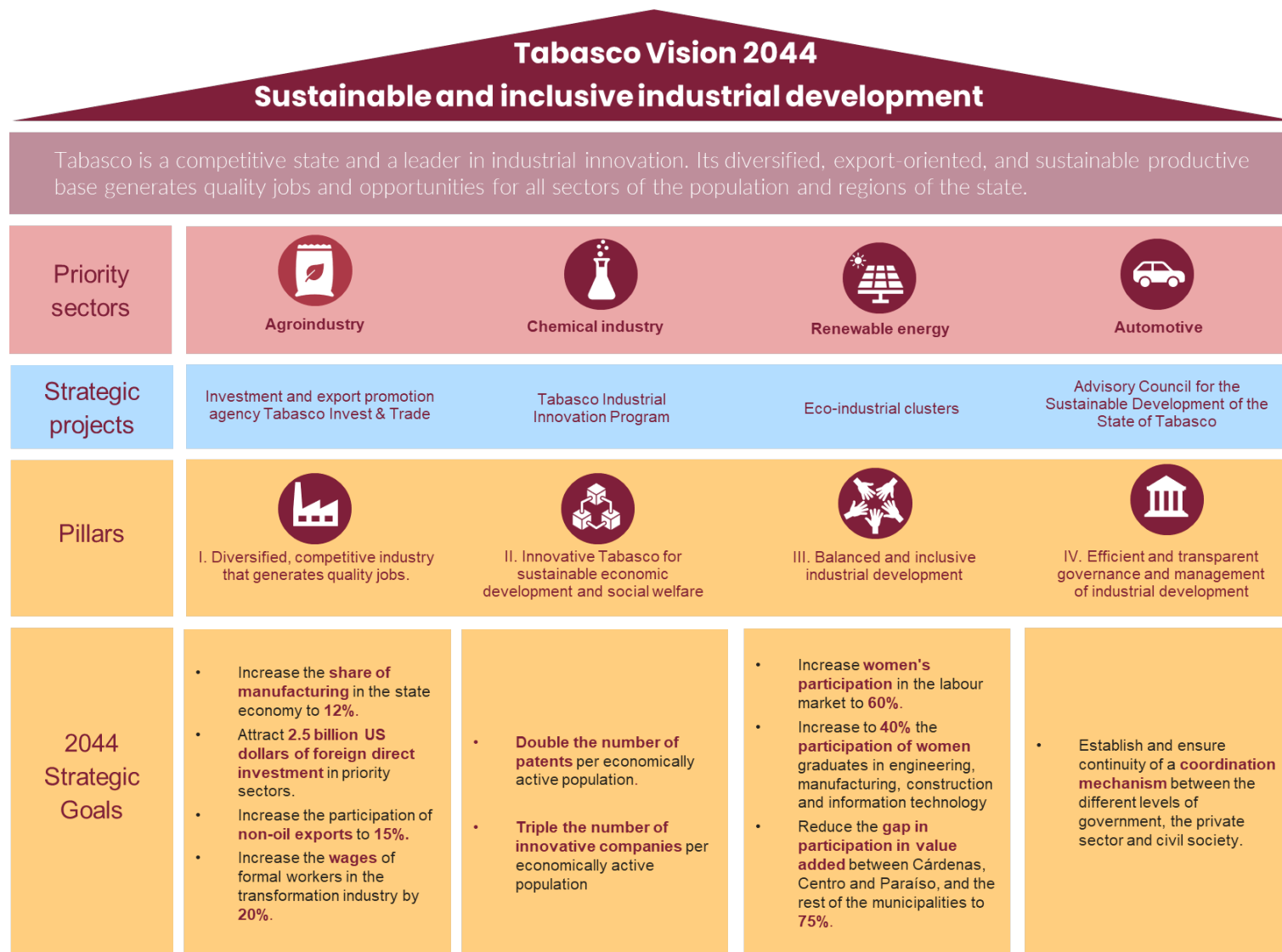
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<sup>4</sup> UNIDO (2019). *Inclusive and Sustainable Industrial Development: The Gender Dimension*. Vienna.

<sup>5</sup> National Council for the Evaluation of Social Development Policy, CONEVAL (2019). *La pobreza en la población indígena de México, 2008 - 2018*; Consejo Nacional para Prevenir la Discriminación, CONAPRED (2021). *National Survey on Discrimination 2017. Results on indigenous and Afro-descendant people*. Mexico City.

<sup>6</sup> INEGI (2019). *Economic Census 2019. Final results*; INEGI (2023). *National Accounts System of Mexico. Gross Domestic Product by State*.

**Figure 2.** Structure of the Strategic Plan for Industrial Development of the State of Tabasco 2024-2044





The Strategic Plan for Industrial Development of the State of Tabasco 2024-2044 is centred around four pillars, four strategic projects, and four priority sectors (Figure 2). These priority sectors, along with the four pillars, have their own roadmaps that outline specific actions and initiatives to realise the Vision 2044 of the State of Tabasco. To ensure transparency and progress, we have defined goals and indicators for each of the four pillars.

The four pillars for sustainable and inclusive industrial development in the State of Tabasco are:

- I. Diversified, competitive industry that generates quality jobs.* This pillar will focus on developing productive skills, expanding the manufacturing base, and integrating micro, small, and medium-sized enterprises into global and national production chains.
- II. Innovative Tabasco for sustainable economic development and social welfare.* This pillar aims to strengthen the collaboration between industry and academia, as well as to incentivise applied research and development and technology transfer.
- III. Balanced and inclusive industrial development.* This pillar will ensure that industrial development follows a sustainable and inclusive territorial development approach in order to reduce territorial and gender gaps.
- IV. Efficient and transparent governance and management of industrial development.* This pillar will aim to develop governance and management capacities to deliver an efficient and inclusive industrial policy and establish coordination mechanisms with the stakeholders involved in industrial activity.

The four pillars will create the foundations for four strategic projects that will contribute to achieving the 2044 strategic goals and that are described below:

***Strategic project one: Establishment of an investment and export promotion agency, Tabasco Invest & Trade.***

The mission of the investment and export promotion agency will be to position the state of Tabasco as a competitive destination for industrial investment, as well as to promote the internationalisation of Tabasco companies. The agency's functions will include the promotion, attraction and assistance to investors, as well as post-investment follow-up. It will also provide market intelligence services, foreign trade advisory services, and promote exports.

***Strategic project two: Tabasco Industrial Innovation Programme.***

This Programme aims to strengthen the linkages between small and medium-sized companies and cooperatives with Tabasco universities and research centres. This aims to orient research towards priority topics and sectors for industrial development, strengthening applied research and technology transfer to foster economic competitiveness. The Programme will have the following priority sectors: agroindustry, chemical industry (including green chemistry), conventional and sustainable plastics, renewable energy, and the automotive industry. Among its instruments will be:

- A database of technical, technological, and innovation services available from higher education institutions and research centres located in Tabasco.
- Access to specialised technical assistance services (Vale de Innovación Industrial Tabasco, VINNTAB).
- Networking events between the business sector and academia.

- Scholarships and apprenticeships.
- Financial support for the acquisition of machinery and equipment.
- Activities to strengthen eco-industrial clusters.

***Strategic project three: Eco-industrial clusters.***

Three eco-industrial clusters will be developed to respond to the vocations of the different regions of the state:

- Multi-sector eco-industrial cluster (chemical industry, plastics, auto parts and renewable energies) in the Chontalpa Sub-Region.
- Eco-agro-industrial and energy cluster in the Sierra Sub-Region.
- Eco-agro-industrial and energy cluster in the Los Ríos sub-region, linked to the Tenosique Federal Inspection-type slaughterhouse project.

The Poles of Welfare Development (PODEBIS) contemplated as part of the Inter-Oceanic Corridor of the Isthmus of Tehuantepec project are an opportunity for the construction of industrial parks that will provide space for these clusters.

***Strategic project four: Establishment of the Advisory Council for the Sustainable Development of the state of Tabasco.***

The Advisory Council for the Sustainable Development of the State of Tabasco will be a multisectoral, participatory, trans-sexennial, and non-partisan body that aims to promote sustainable and inclusive industrial development in Tabasco. The Advisory Council has its legal basis in the Planning Law of the State of Tabasco.<sup>7</sup> and the Law for the Sustainable Economic Development of the State of Tabasco.<sup>8</sup> Among its functions, the Advisory Council will follow up and ensure effective implementation of the Strategic Plan for Industrial Development of the State of Tabasco 2024-2044.

Tabasco's industrial diversification requires a strategic approach that prioritises those sectors with the most significant potential to add value to the state's productive vocations. With this objective, and through a participatory process, a sector prioritisation exercise was carried out, identifying four priority industries: (i) Agroindustry, (ii) Chemical industry, (iii) Renewable energy, and (iv) Automotive (Figure 3).

**Next steps**

The Advisory Council for the Sustainable Development of the State of Tabasco will coordinate the following steps to promote the strategies and actions outlined in the Strategic Plan for Industrial Development of the State of Tabasco 2024-2044. The operation of the Advisory Council will be organised into five expanded working groups, which may incorporate other relevant stakeholders as determined by its members, including representatives of the federal government and municipalities: (i) Planning and strategy, (ii) Investment and exports, (iii) Innovation for development, (iv) Productive infrastructure, and (v) Balanced and inclusive industrial development.





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<sup>7</sup> Planning Law of the State of Tabasco. 1983. <https://tabasco.gob.mx/leyes/descargar/0/321>

<sup>8</sup> Law for the Sustainable Economic Development of the State of Tabasco. 2019. <https://tabasco.gob.mx/leyes/descargar/0/513>



Figure 3. Priority sectors

	Description	Opportunities	Initiatives		
			Short-term (2024-2025)	Medium-term (2026-2030)	Long-term (2031-2044)
 <b>Agroindustry</b>	Adding value to agriculture, livestock, aquaculture, fishing and forestry production.	Provision of extension services for compliance with quality and organic production standards, as well as a greater emphasis on applied research.	Technical training, extension services, irrigation infrastructure, certification (Iason offices, NOM cocoa, census and promotion databases).	Technological extension programs, applied research centres, investment incentives, public-private partnerships, flagship projects and dissemination campaigns (Tabasco brand and certificates of origin).	Market services, local production dissemination programs, TIF slaughterhouse, agro-industrial incubator, product design training, ejido land regularisation, and logistics infrastructure (ports).
 <b>Chemical industry</b>	Petrochemical, chemical, green chemical, plastic and rubber industries.	Transition to green chemistry, digital transformation and regionalization of investments in the sector.	Development of specialized infrastructure, an appropriate regulatory framework, attraction of biomass traction companies, and academia-industry connections.	Tax incentives and strengthening industry-academia-government collaboration for renewable energies with economic support for applied research and small producers.	Energy innovation centres, public-private financing, tax incentives for energy generation, flagship projects (e.g., mega solar park) and sustainable development law.
 <b>Renewable energy</b>	Biomass, solar, hydro and wind energy generation, as well as components of this productive chain.	Development of the bioenergy and bioproducts production chain, as well as development of suppliers for the hydroelectric and solar photovoltaic energy chains.	Development of technical competences, review of the regulatory framework and incentives for attracting investment, recycling policy, repatriation of talent and provision of venture capital.	Creation of a chemical cluster in the Chontalpa region, funds for innovation and scientific connection, environmental regulation, promotion of recycling, and improvement of energy and innovation infrastructure.	Establishment of advanced chemical technology centre, attraction of tractor companies (e.g., fertilizer plant), infrastructure (gas, electricity and water) and new legal framework.
 <b>Automotive</b>	Manufacture of auto parts to be linked to the automotive production chain in the country.	Strategic geographic position, logistic potential, availability of energy resources, water and skilled labour force, and investment attraction.	Establishment of a long-term vision, foreign investment attraction agency, tax incentives, highway and industrial park development, creation of technical training programmes.	Creation of programmes for supplier development, tax incentives, technical and vocational training centres, training subsidies, and technical assistance for exports.	Tax incentives for specialised products, intermediate technological institutions, innovation and technology adoption funds, technology parks, and training subsidies.



En colaboración con Cambridge Industrial Innovation Policy (CIIP). CIIP trabaja con gobiernos y organizaciones globales para promover la competitividad industrial y la innovación tecnológica.

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