



# THINK SMART, THINK HONDURAS

Presentation by:  
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# DID YOU KNOW WE ARE



## MANUFACTURING



**COTTON  
T-SHIRTS**

#1

EXPORTER  
TO THE USA

#5

EXPORTER IN  
THE WORLD



**FLEECE**

#2

EXPORTER  
TO THE USA



**WIRE HARNESSSES**

#3

EXPORTER  
IN THE  
AMERICAS

## AGRICULTURE



**FRESH TILAPIA<sup>1</sup>**

#1

EXPORTER IN  
THE WORLD



**COFFEE**

#6

EXPORTER IN  
THE WORLD<sup>2</sup>



**BANANA**

#4

EXPORTER  
TO THE USA



**PALM OIL**

#2

EXPORTER  
IN LATAM



**CIGARS**

#7

EXPORTER IN  
THE WORLD



**FROZEN SHRIMP**

#4

EXPORTER IN  
THE AMERICAS

## SERVICES



**TOURISM**

ACCESS  
TO #2 LARGEST  
CORAL REEF



MAIN MAYAN  
CITIES & HEART  
OF MAYAN ART

**BPO  
& ITO  
SERVICES**

ONE OF  
THE MOST  
DYNAMIC  
MARKETS



**8.5%**

**ANNUAL  
GROWTH**

FOR EXPORTS IN  
THE LAST 5 YEARS  
(VS. 4% GLOBAL)



1 Fresh, chilled tilapia fillets 2 Exports normalized by country area (per sq. km)

SOURCE: UN Comtrade

HONDURAS  
**2020**  
PROGRESO EN LA TRANSICIÓN

2

# WE ARE IMPLEMENTING REFORMS TO FURTHER **IMPROVE** OUR COUNTRY **COMPETITIVENESS**



**HONDURAS HAS THE HIGHEST INCREASE IN COMPETITIVENESS IN LATAM & TOP 3 IN THE WORLD**

Change in WEF competitiveness ranking from 2014-2015 to 2015-2016



1 National employment program per hour

SOURCE: Global Competitiveness Index (World Economic Forum)



# HONDURAS HAS IDENTIFIED 6 KEY SECTORS

FOR ITS DEVELOPMENT



**A HOLISTIC ANALYSIS WAS  
CONDUCTED TO DEFINE  
PRODUCTIVE SECTORS IN  
WHICH HONDURAS HOLDS THE  
GREATEST POTENTIAL**

TOURISM



TEXTILES



INTERMEDIATE  
MANUFACTURING



BPO  
ITO



AGROINDUSTRY



HOUSING



SOURCE: Team analysis



IN ORDER TO CONTINUE  
PROMOTING THE GROWTH OF

**HONDURAS**



WE HAVE AN  
AMBITIOUS VISION

IN THE **6**

**KEY SECTORS**



## 2020 VISION



**Sun-and-beach leader** in the Caribbean with an **exclusive combination of world class infrastructure**, Access to **exotic ruins**, and the **second largest coral barrier reef** in the world

**Leader in the Western Hemisphere** in textile exports and one of the **main exporters** to the US and Europe through a **textile hub** with world class talent that pushes the **frontier of innovation and sustainability**

The **most dynamic and efficient cluster in auto parts and electric equipment** in the continent and the **preferred supplier** for the largest OEMs in the region

The **fastest growing BPO and ITO hub** driven by a group of unrivaled young bilingual talent

One of the leaders in the region in **high yield crops** and a sustainable model of support to **small and subsistence farmers**

**Affordable housing in sustainable communities** through better policies, access to finance, and holistic urban and public service plans

**TOURISM**



**TEXTILES**



**INTERMEDIATE  
MANUFACTURING**



**BPO  
ITO**



**AGROINDUSTRY**

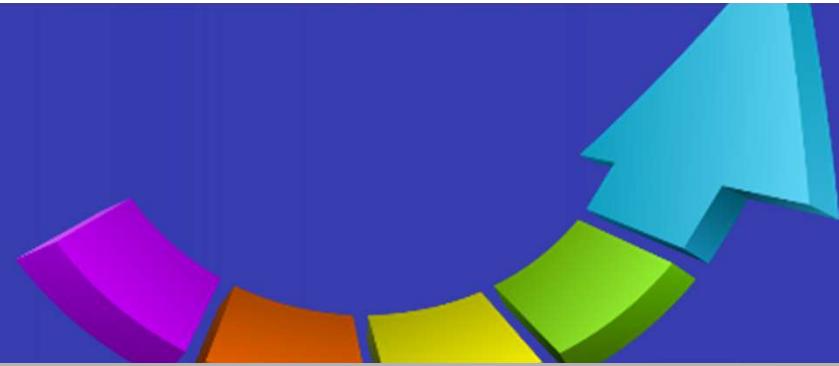


**HOUSING**



SOURCE: Team analysis

## HONDURAS

WILL BECOME THE  
MOST ATTRACTIVEDESTINATION  
→ IN THE CARIBBEAN2020  
VISION

“Position Honduras as the **leading sun and beach destination** in the Caribbean with the most attractive offer including an **exclusive combination** of world-class infrastructure and service, access to **exotic ruins**, and access to the second **largest coral barrier reef** in the world”

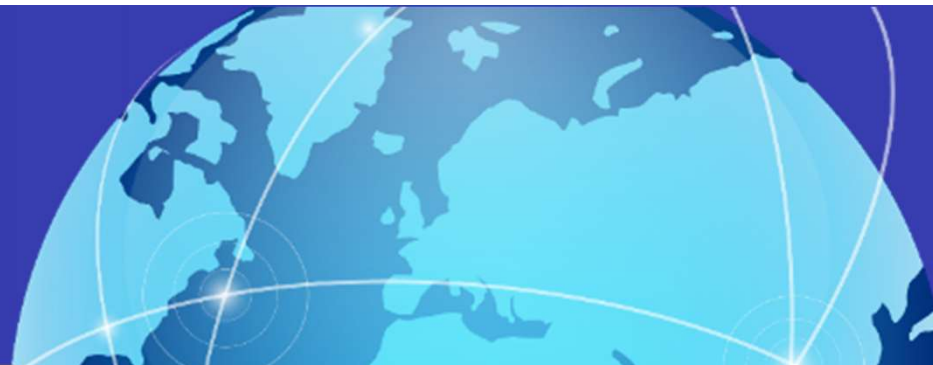


OUR VALUE PROPOSITION  
IN TOURISM



IS  
BASED  
ON

**5 PILLARS**



**PREFERRED  
CARIBBEAN  
DESTINATION**



**1 ACCESS TO THE SECOND  
LARGEST CORAL BARRIER  
REEF IN THE WORLD**



**2 EXOTIC  
LANDSCAPES IN THE  
BAY ISLANDS**



**3 ONE OF THE MOST IMPORTANT  
MAYAN CITIES**



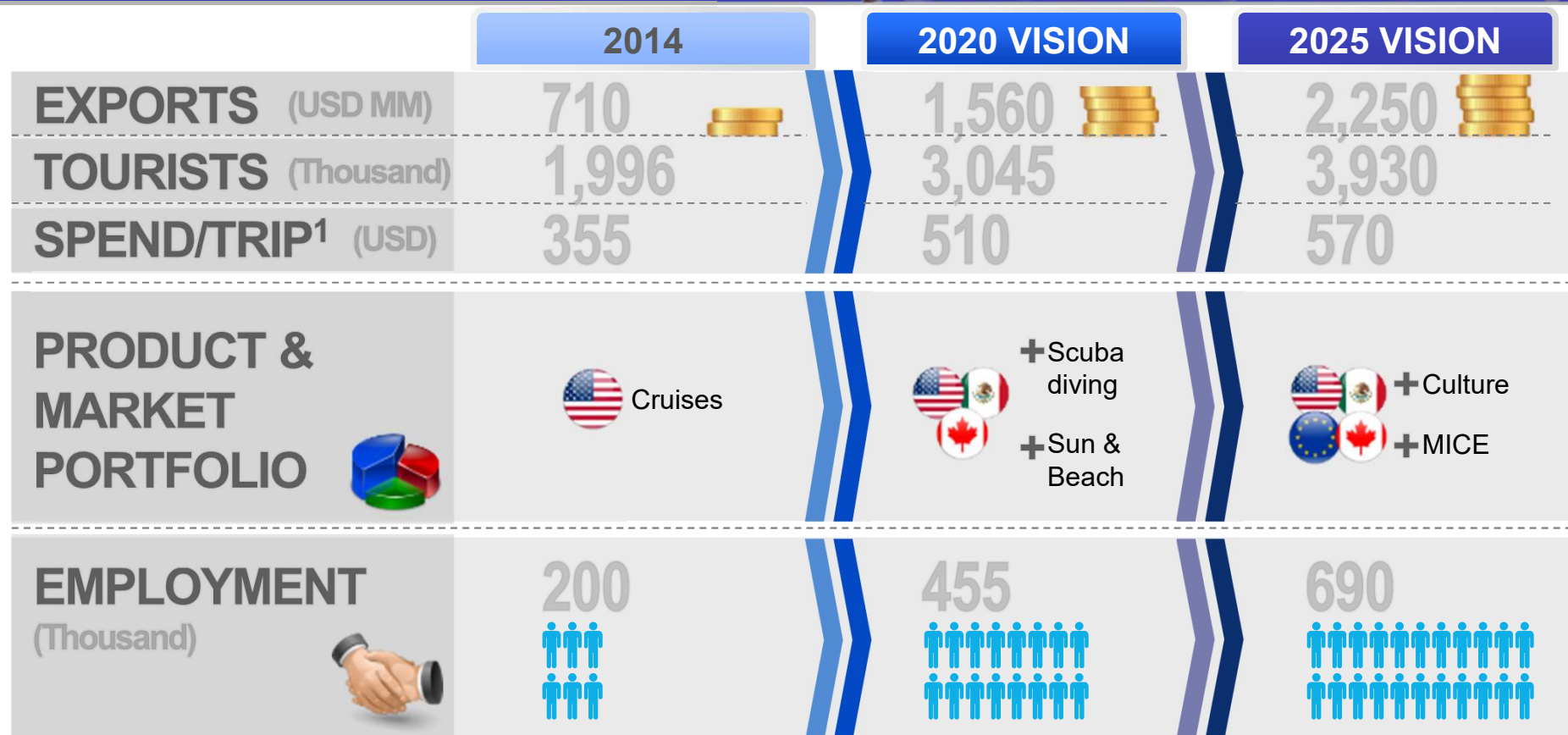
**4 PRIVILEGED LOCATION  
WITH ACCESS TO  
KEY TOURISM MARKETS**



**5 YOUNG AND BILINGUAL  
LABOR FORCE**



# THE ASPIRATION I WILL FOSTER EXPORTS & JOB CREATION

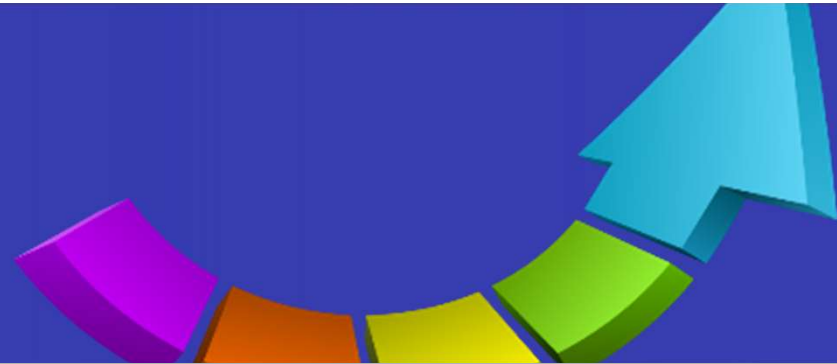


1 Compounded average by type of tourist

SOURCE: Team Analysis



# THE TEXTILE INDUSTRY HAS THE POTENTIAL TO BECOME THE SECTOR LEADER → WITHIN THE AMERICAS



- 1 Currently Mexico
- 2 Currently Mexico (#5) and India (#6)
- 3 Currently Thailand, with ~1bn USD

## 2020 VISION



“Position Honduras as the **leader in the Americas** (from #2 to #1<sup>1</sup>) in textile exports and one of the mayor exporters to the USA (from #7 to #5<sup>2</sup>) and Europe (from #65 to #25<sup>3</sup>) through a **textile hub with world class talent** that pushes the **frontier of knowledge in textile sustainable development**”

OUR VALUE PROPOSITION  
IN TEXTILES



IS  
BASED  
ON

**3 PILLARS**

**1 QUICK TURNAROUND TIME  
PROVIDES A CONVENIENT ANSWER  
TO THE LATEST SUPPLY CHAIN TRENDS  
AND TO CONSUMER PREFERENCES**



WE ARE  
**LEADERS IN  
TEXTILES**



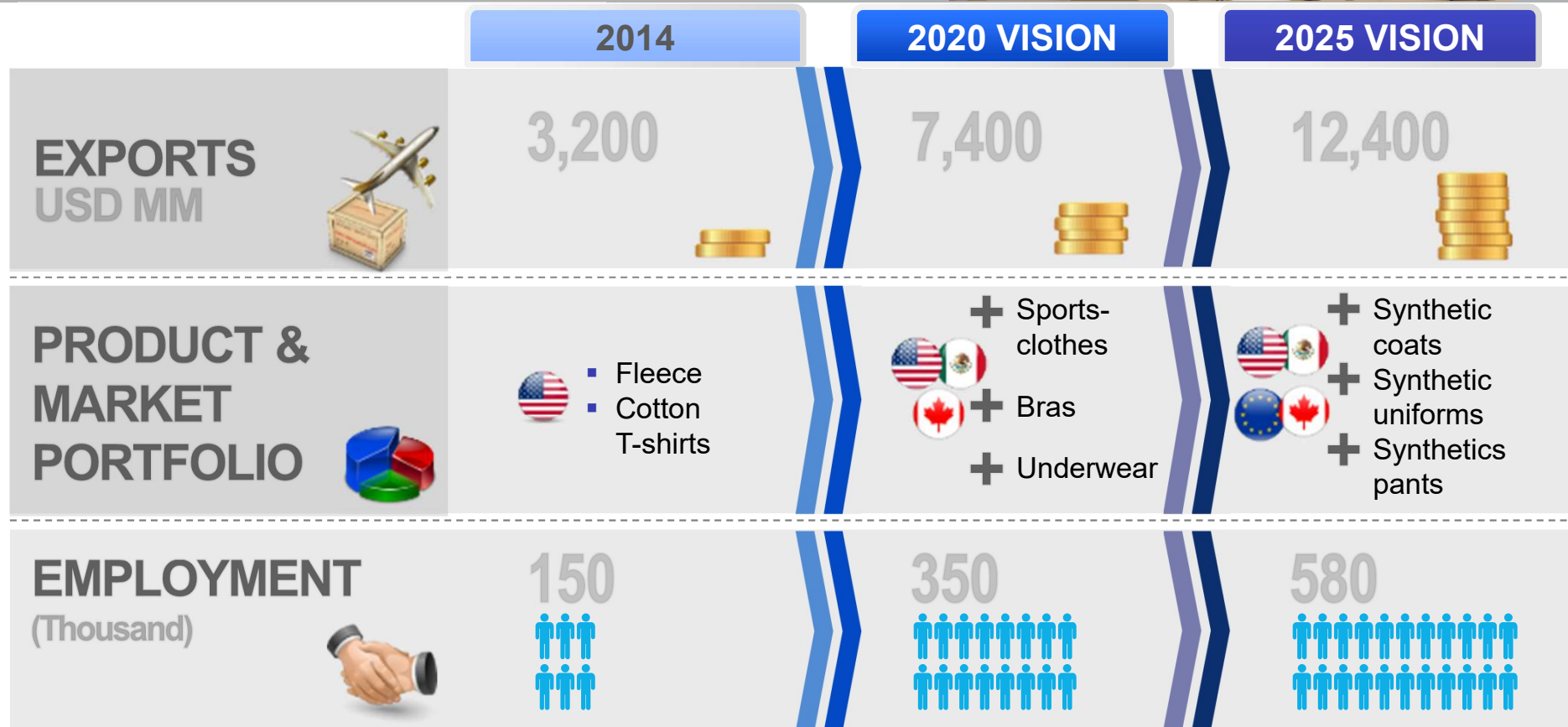
**2 GLOBALLY COMPETITIVE  
PRODUCTION COSTS**



**3 ENVIRONMENTALLY AND  
SOCIALLY RESPONSIBLE  
BUSINESS MODEL**

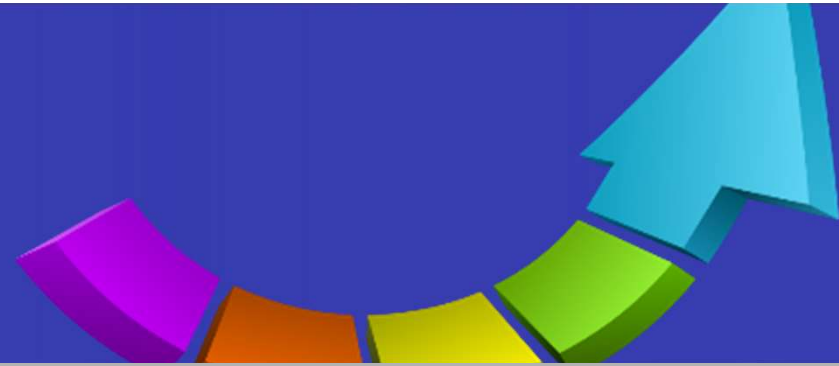


# THE ASPIRATION I WILL FOSTER EXPORTS & JOB CREATION



# INTERMEDIATE MANUFACTURING

HAS THE POTENTIAL TO BECOME  
THE MOST DYNAMIC CLUSTER  
→ WITHIN THE AMERICAS



# 2020

V I S I O N



“Position Honduras as the  
**most dynamic** and  
**efficient auto part &  
electric equipment  
cluster** in the continent and  
**preferred supplier** to  
largest OEMs in the region”





IS  
BASED  
ON

# 3 PILLARS



WE ARE LEADERS IN  
**INTERMEDIATE  
MANUFACTURING**



# 1

**QUICK TURNAROUND TIME  
PROVIDES A CONVENIENT RESPONSE  
TO THE LATEST SUPPLY CHAIN TRENDS**



# 2



**GLOBALLY COMPETITIVE  
PRODUCTION COSTS**

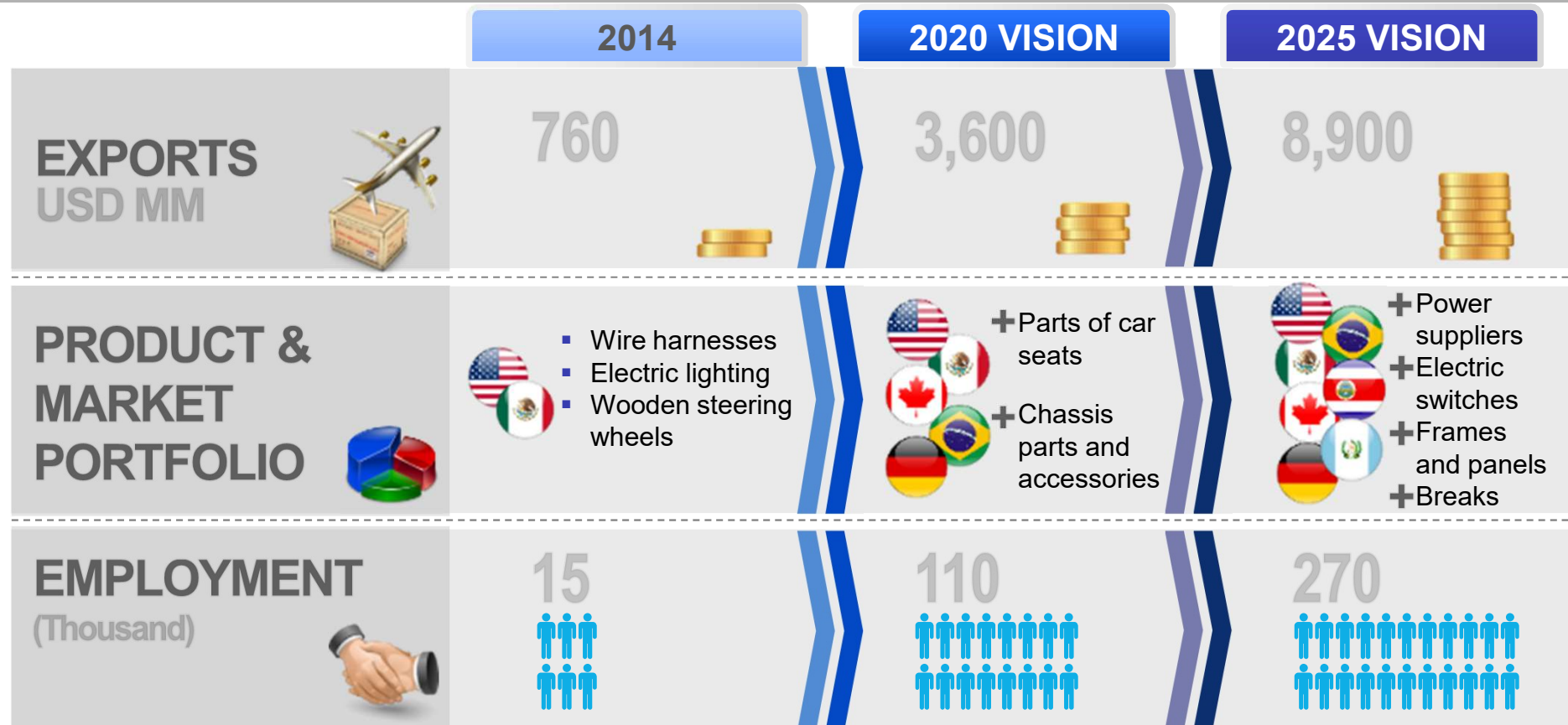


# 3



**YOUNG AND BILINGUAL  
WORK FORCE**

# THE ASPIRATION I WILL FOSTER EXPORTS & JOB CREATION



SOURCE: Team Analysis

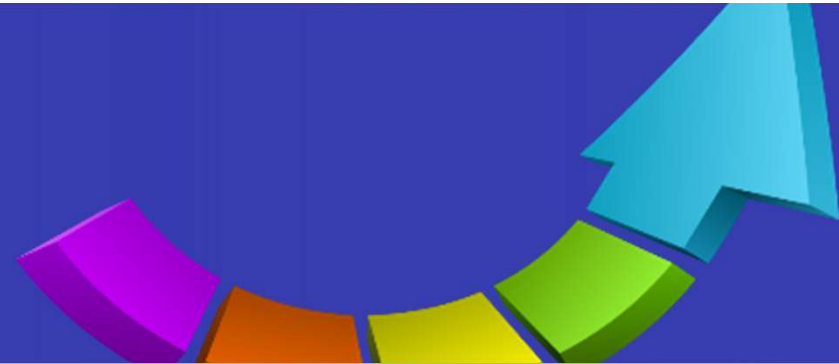


## BUSINESS SERVICES

HAS THE POTENTIAL  
TO BECOME THE

# MOST DYNAMIC CLUSTER

→ WITHIN THE AMERICAS



# 2020

V I S I O N



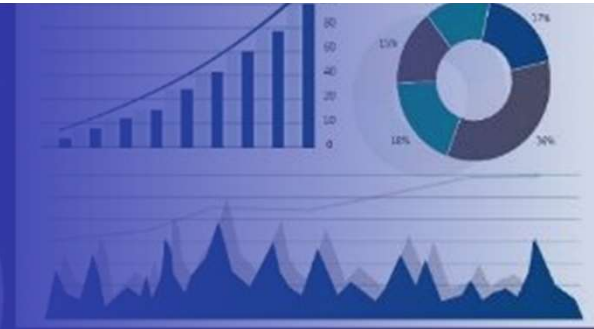
**“Fastest growing  
business services hub  
powered by a unique pool  
of young bilingual talent”**

OUR VALUE PROPOSITION  
→ IN CORPORATE SERVICES



IS  
BASED  
ON

# 4 PILLARS



WE ARE  
**LEADERS IN  
CORPORATE  
SERVICES**



1



**VERY  
COMPETITIVE  
LABOR COSTS**



2



**WORLD CLASS BPO  
INFRASTRUCTURE**

3



**YOUNG AND BILINGUAL  
LABOR FORCE**

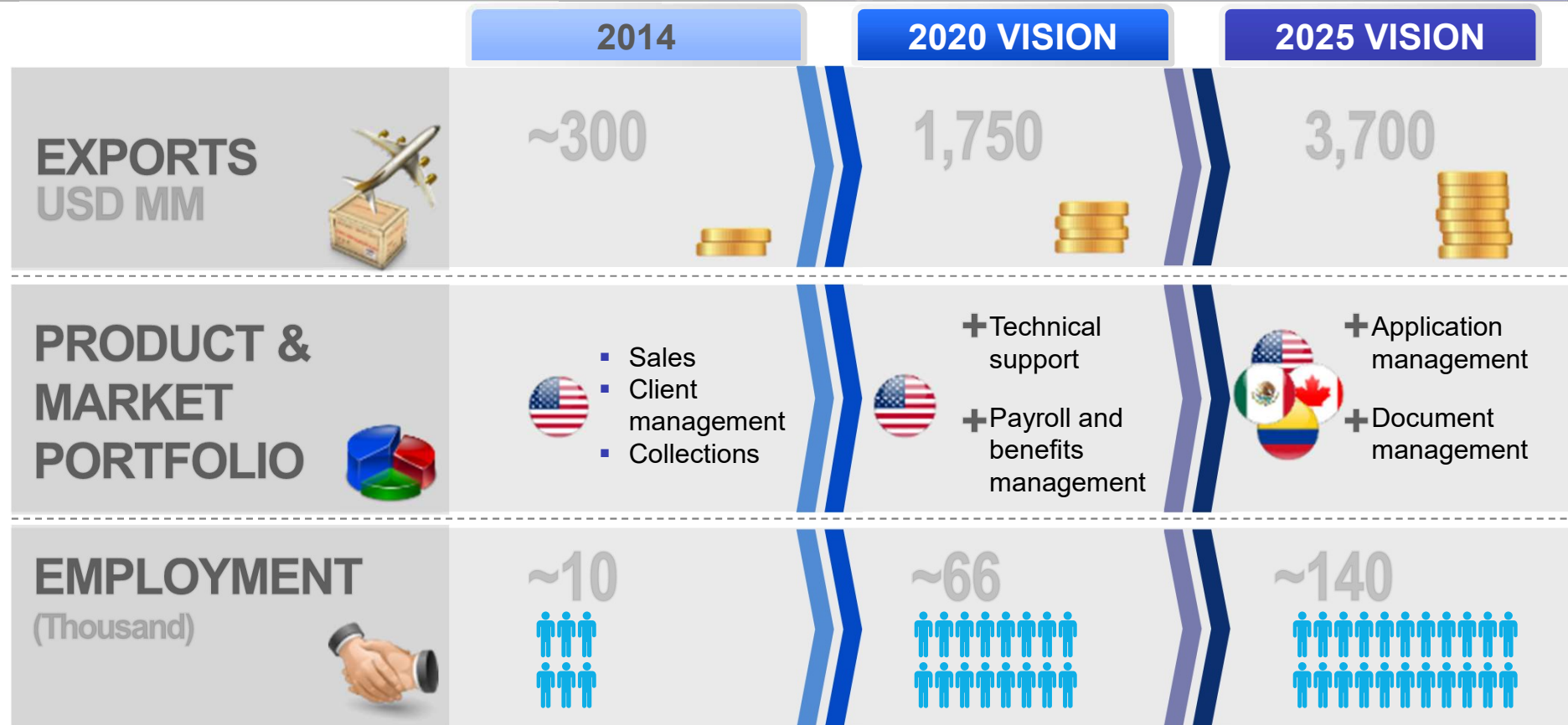
4

**STRATEGIC  
GEOGRAPHIC LOCATION**



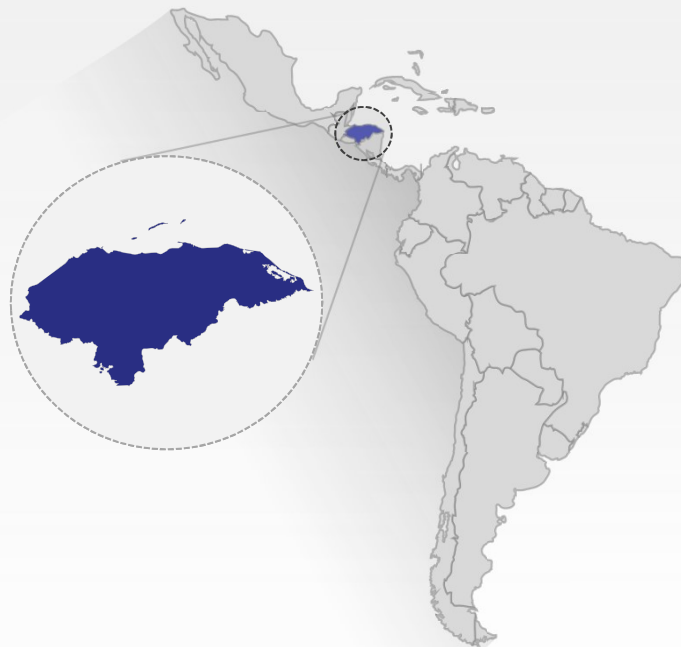
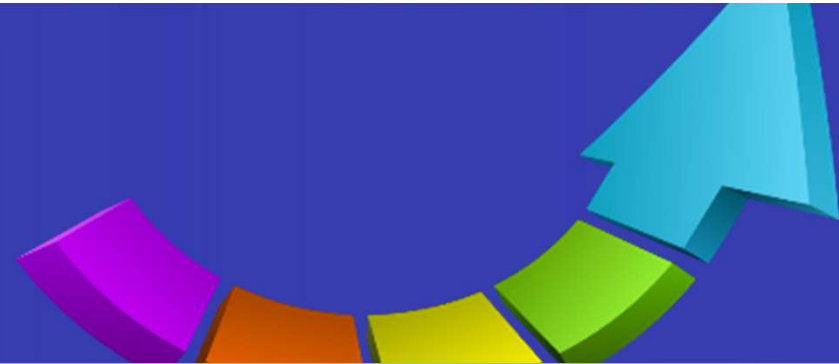


# THE ASPIRATION I WILL FOSTER EXPORTS & JOB CREATION



## AGRIBUSINESS

HAS THE POTENTIAL TO  
GENERATE LARGER REVENUES FOR  
FARMERS OF ALL SIZES CREATING  
→ SOCIAL AND ENVIRONMENTAL IMPACT

VISION  
FOR

2020



Add **US\$700M+** to yearly GDP in the agricultural sector, generating larger revenues for commercial farmers and strengthening the role of **Honduras as producer of high yield crops** with an increase in value added

Become a **reference on how to support the reach of small and subsistence farmers**, providing assistance to **40,000 housing units owned by small farmers**

Streamline our business so that products arrive to the market with greater ease, by **significantly improving government processes**, including less paperwork and improving response times

Reduce deforestation in Honduras, starting with **60,000-80,000 cocoa hectares**

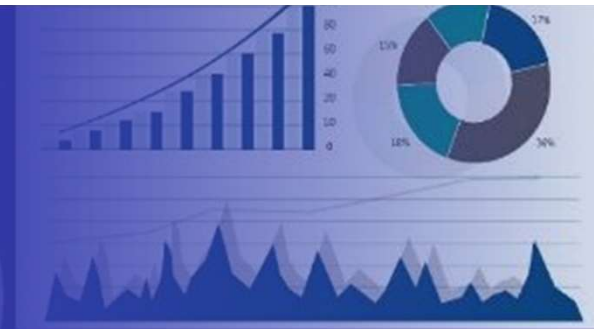


OUR VALUE PROPOSITION  
IN AGRIBUSINESS



IS  
BASED  
ON

**4 PILLARS**



WE WILL BE  
**THE REGIONAL  
BENCHMARK IN  
PRODUCTIVITY  
OF HIGH YIELD  
CROPS**



**1**



**SOLID VALUE CHAINS OF  
CACAO, COFFEE,  
PALM, DAIRY PRODUCTS /BEEF**

**2**



**SMALL FARMERS WITH  
HIGHER SCOPE EFFECTIVENESS**

**3**



**AGILE PROCESSES  
AND COMPETITIVE TAXES**

**4**

**SUSTAINABLE  
FOREST MANAGEMENT**



THE HOUSING  
OFFER WILL INCREASE  
TO KEEP PACE WITH HIGH  
ECONOMIC GROWTH



VISION FOR  
2020



“Create **more than 50,000 affordable housing units in sustainable communities** for those who benefit from the jobs generated by Honduras 20|20, through better policies, access to finance, and holistic urbanization and public service provision plans”



## THE HOUSING VISION

→ WILL BE ACHIEVED THROUGH



## 4 PROGRAMS



WE PROVIDE  
**AFFORDABLE  
HOUSING IN  
SUSTAINABLE  
COMMUNITIES**



1

**BETTER LIFE BONUS PROGRAM**

SUPPORT PROVIDED FOR THE HOUSING CONSTRUCTION  
FOR PEOPLE WHOSE INCOME IS LESS THAN ½ MINIMUM WAGE



2

**ABC PROGRAM**

HOUSING ACQUISITION AND CONSTRUCTION FOR  
FAMILIES WHOSE INCOME IS LESS THAN 4  
MINIMUM WAGES



3

**MAQUILA SECTOR BONUS PROGRAM**

SUPPORT PROVIDED FOR HOUSING ACQUISITION NEAR  
THE INDUSTRIAL MAQUILA PRODUCTION



4

**FINANCIAL SUPPORT TO DEVELOPER PROGRAM**

SEED CAPITAL FOR CONVIVIENDA CERTIFIED PROJECTS



# WE ARE LOOKING FOR OPPORTUNITIES TO WORK TOGETHER



## OPPORTUNITIES FOR INVESTMENT

### BUY FROM HONDURAS



Consider multiple exciting opportunities for **sourcing Honduran high-quality and affordable products and services** like **textile products, auto-parts and electric parts, coffee, fruits, vegetables, BPO & ITO services....** and more!

### INVEST IN HONDURAS



Be **part of the transformation and begin operations in Honduras**. Take advantage of our **investment protection laws, attractive tax incentives**, robust macroeconomic environment, **competitive labor force**, privileged **logistic position**, and multiple **FTAs**

### FINANCE HONDURAS



Consider **attractive investment opportunities** throughout a portfolio of **10bn+ USD public-private infrastructure** projects that will foster growth and job creation in the economy in the next 5 years



GRACIAS THANK YOU DZIĘKI