

Cuba

UNLOCKING THE VALUE OF CUBA'S HONEY AND COFFEE FOR PREMIUM GLOBAL MARKETS

HAND-IN-HAND INVESTMENT FORUM
ROME, OCTOBER 2026



Why Cuba?

6.3M ha
Agricultural land

1.6% GDP
Agriculture, Livestock and Forestry

5,700 km
Of coastline

Strategic location
Connecting the Americas, Europe and Asia

ACROSS CUBA, **THOUSANDS OF FARMERS, BEEKEEPERS AND COOPERATIVE MEMBERS** ARE BEHIND THE COUNTRY'S DISTINCTIVE **HONEY AND COFFEE**, CARRYING GENERATIONS OF KNOWLEDGE AND AGRICULTURAL TRADITIONS

Yet, too much of the value they create is left unrealized. Low productivity, ageing infrastructure and limited value addition constrain incomes and prevent farmers and their communities from fully benefiting from growing opportunities in premium markets.



What is limiting value creation in Cuba’s honey and coffee sectors?

THREE STRUCTURAL GAPS ARE LIMITING PRODUCTIVITY, VALUE ADDITION AND ACCESS TO PREMIUM MARKETS

01 Production potential remains underused

Low productivity, climate vulnerability and input shortages constrain honey production, while only around 30% of Cuba's potential coffee land is currently in production

02 Ageing infrastructure limits quality and value addition

Limited processing capacity constrains diversification of bee products, while outdated coffee pulping equipment, processing facilities and logistics contribute to quality losses and restrict production

03 Premium market opportunities remain largely untapped

Honey faces market-access and certification barriers, while coffee needs stronger traceability, certification and branding to capture greater value in premium international markets

Where are the biggest investment opportunities?

TWO STRATEGIC INVESTMENTS FOR **USD 84.0 MILLION** TO INCREASE PRODUCTION, EXPAND VALUE ADDITION AND REACH PREMIUM MARKETS

01 Honey

Transform Cuba's honey sector from predominantly bulk exports into a diversified portfolio of high-value bee products.

Investments will support 65,000 ha of melliferous flora, modernize processing plants and expand production of packaged honey, pollen, wax, propolis, royal jelly and cosmetics, alongside digital traceability and certification.

USD 33.0M	**USD 20.0M**	**29.0%**
Investment	NPV	IRR

02 Coffee

Rebuild Cuba's coffee sector from farm to cup by renewing production areas, modernizing processing infrastructure and positioning Cuban specialty coffee in premium export markets, building on the existing BIOCUBACAFE joint venture with Lavazza.

Investments include the renewal and expansion of 5,000 ha, modern pulping, fermentation and drying equipment, renovation of roasting and packaging capacity, and traceability and certification systems.

USD 51.0M	**USD 44.0M**	**24.0%**
Investment	NPV	IRR

Why invest in Cuba now?

A STRONG LEGAL FRAMEWORK, STRATEGIC MARKET ACCESS AND ESTABLISHED PRODUCTION BASE

Strong Investment Framework

Foreign Investment Law 118/2014 provides investor protections, alongside tax and customs incentives

Strategic Market Access

Cuba's Caribbean location provides connections to markets across the Americas, Europe and Asia

Export-ready Infrastructure

The Mariel Special Development Zone and Cuba's extensive coastline provide infrastructure and logistics opportunities for international trade

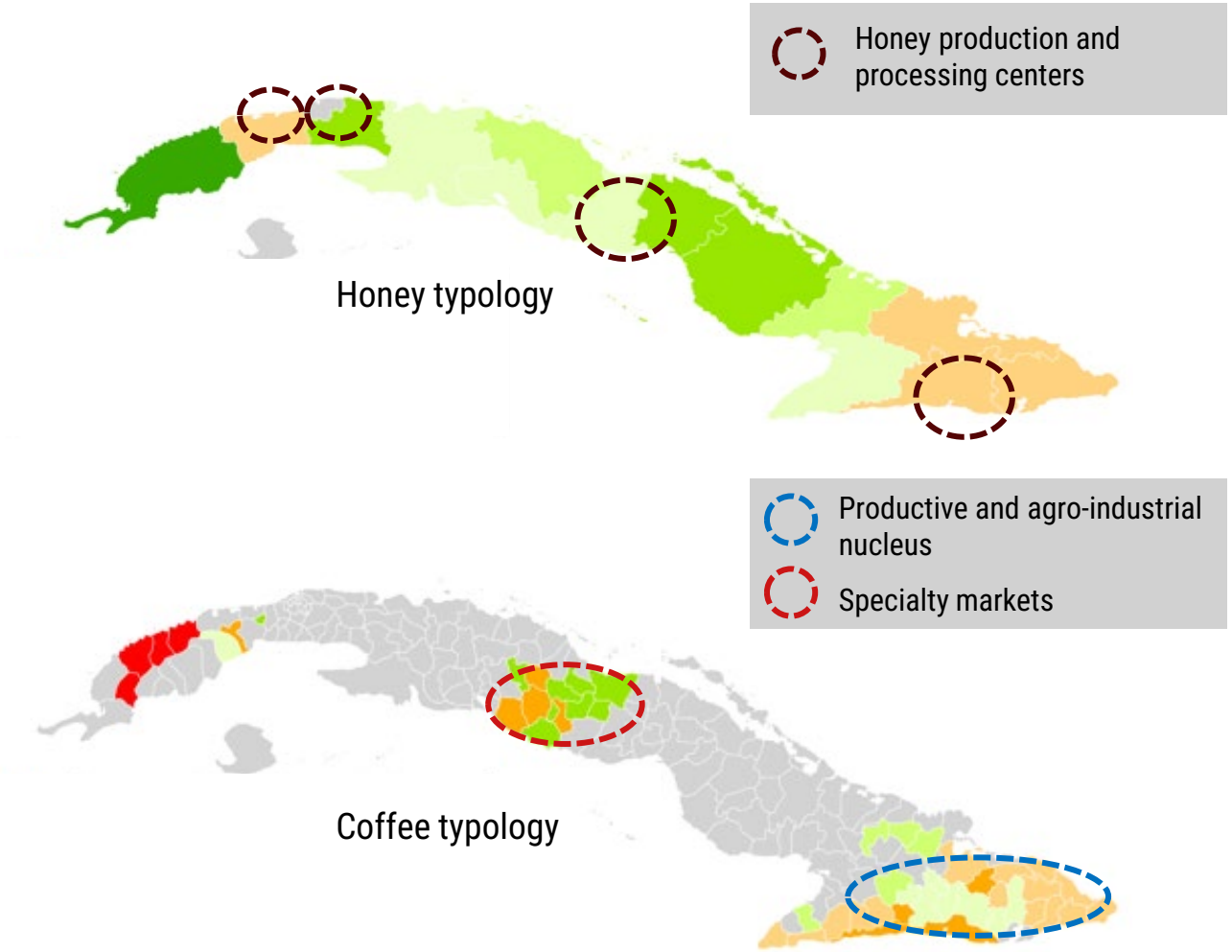
Established Production Base

Cuba has established apiary networks, coffee production and cooperatives nationwide

Premium Market Potential

High-value honey products and specialty Arabica coffee offer opportunities to capture greater value from international markets

What impact can these investments deliver?



FAO'S GEOSPATIAL PLATFORM HELPS IDENTIFY AREAS WHERE AGRICULTURAL POTENTIAL IS GREATEST.

INVESTMENTS ARE TARGETED TO ADDRESS THE SPECIFIC CHALLENGES OF EACH TERRITORY, MAXIMIZING IMPACT.

- Critical with moderate agricultural opportunities
- Medium priority with moderate agricultural opportunities
- Low priority
- High priority
- Medium priority with high agricultural opportunities
- Low priority with high agricultural opportunities
- High performance



What impact can these investments deliver?

BUILDING HIGHER-VALUE, MORE COMPETITIVE AND EXPORT-READY HONEY AND COFFEE SECTORS

Honey

Direct beneficiaries

2,100

Indirect beneficiaries

6,300

Per capita income increase

USD 1,545

Coffee

Direct beneficiaries

1,500

Indirect beneficiaries

20,000

Per capita income increase

USD 4,673

Overall GHG impact **-13.8 tCO2-e**

How can you be part of this story?

THREE SIMPLE STEPS

01 Explore the Investment Note

Download the **full investment note** or **investor deck** from the country page:

Access the most relevant document to you for more details on the country's investment cases.

02 Request a Bilateral Meeting

Schedule a one-on-one session with the country's delegation to discuss opportunities.

03 Join as an Investor/Partner



Engage with us as a DFI, MDB, or private investor to structure, derisk, and deploy capital.