

## National Investment Forum | June 29, 2026 | Pétiion-Ville

### An EU Initiative | Global Gateway Haiti

#### Haiti, a Strategic Foothold in the Caribbean

#### Context

At first glance, Haiti's economy appears to be at high risk: it contracted for a seventh consecutive year in 2025, in a very tense security context. Real GDP declined by 2.7% in 2025, with a decline across all economic sectors. Inflation averaged 28.3%, up from 25.8% in 2024, driven by rising food and housing prices, which disproportionately weighed on the poorest households. Government revenue decreased to 4.8% of GDP. The share of the population living on less than US\$3.00 per day is estimated at 49.0% in 2025.

The argument for investing in Haiti is not made despite the crisis. It is made through a clear-eyed reading of what exists and what is possible.

Haiti is now at a crossroads with a new security effort, the gradual arrival of the new gang suppression force, a private sector looking for new opportunities and above all economic prospects linked to reconstruction and stabilization challenges that can make it possible to revive an economy still rooted in the crisis but whose actors are mobilizing. Haiti's long-term economic potential is based on its young population, its proximity to the main export markets, the importance of remittances from the diaspora and opportunities in agriculture, light industry and services, low public debt. Haiti could also benefit from the fact that 7 out of 10 regions (mainly in the North and the South) remain stable and appear clearly to be the future pillar for relaunching the economy thanks to a high potential in organic agriculture and pre-existent ports and airports facilities to develop and easily connect the island to international routes, re-balancing that way the whole national economy — so far too concentrated in the metropolitan region of Port-au-Prince and Artibonite region where the insecurity remains high.

If, because of the crisis and the importance of the informal sector, financial flows are difficult to analyze, and if State governance and the effective implementation of the State budget are stabilized and strengthened, several levers could be used: low public debt, high foreign exchange reserves (allowing some mitigation measures for possible shocks to gourde), low cost of debt service, relative importance of outgoing transfers (approximately USD 30 million per month, sign of a certain capacity of local businesses).

Waiting for full stability before investing is not a viable strategy. Structured investment in infrastructure, energy, and productive value chains is itself a contributor to stability; economic, social, and political. The Global Gateway framework is built precisely for contexts where risk needs to be managed and shared across public and private actors.

However, realizing this potential will require overcoming important structural and security challenges. With the mobilization of the private sector, the development of a strong public policy in favor of the attractiveness of investments for the reconstruction of the country, and strong

international support could allow the Haitian economy to return, open up and modernize in a sustainable way. The EU (as Haiti's main partner in development and emergency aid), its Member States (as ones of the biggest contributors to the Trust Fund of the gang suppression force), and EU companies can become unique business partners in this exceptional momentum for the stabilization of the country and benefit from opening opportunities that the country could offer (shorter maritime routes, agrobusiness potential, CRM, infrastructures contracts alongside with the implementation of a robust public-private partnerships policy).

### **Airports as Critical Infrastructure for Haiti's Reconstruction**

Air connectivity is not a secondary transport issue. It is a prerequisite for Haiti's economic recovery, institutional stabilization, and reintegration into regional and international markets.

Across Latin America and the Caribbean, aviation supports approximately 8.3 million jobs and generates more than \$240 billion in economic activity, representing 3.6% of regional GDP. In the Caribbean alone, the sector contributes \$2.5 billion to GDP and supports approximately 1.6 million jobs directly and indirectly (ATAG, 2023). Globally, air transport carries over one-third of world trade by value, serving as the backbone of high-value, time-sensitive supply chains. Haiti sits within this regional economic system but is currently unable to participate in it effectively due to the degradation of its air infrastructure.

Airports are not merely transport facilities; they are strategic economic assets and investment enablers. According to Oxford Economics and Airports Council International (ACI World), a 10% increase in airport connectivity is associated with a 4.7% increase in foreign direct investment and a 0.5% increase in regional GDP. For Haiti, restoring functional international air infrastructure would directly improve the conditions for foreign investment, support employment creation in manufacturing and services, and restore the viability of export-oriented value chains that currently lack a reliable logistics backbone.

Before its forced closure in November 2024, Toussaint Louverture International Airport in Port-au-Prince served as Haiti's principal gateway for passengers, cargo, humanitarian operations, and international investors, connecting the country to major destinations across North America, Europe, and the Caribbean. Its closure has had immediate and measurable economic consequences.

Haiti's agricultural and high-value exports, including vetiver, fresh mangoes, and organic cacao, depend on rapid air cargo connectivity that maritime transport cannot provide. Tourism, which generated approximately \$450 million in revenue in 2019 and represented nearly 3% of GDP at its peak, is likewise entirely dependent on international air and maritime access. Haiti's geography leaves no overland alternative: there is no regional road access capable of substituting for international air connectivity.

Cap-Haïtien International Airport remains operational and continues to provide critical connectivity for the northern region and selected routes to the United States and the Caribbean. However, it was never designed to absorb the traffic, operational role, or strategic importance previously handled by Toussaint Louverture International Airport. The current situation significantly constrains business mobility, humanitarian coordination, technical deployment, and investor access to the country.

No investor conducts due diligence, no European development partner undertakes project supervision, and no technical expert deploys at scale without reliable international access into the country. The absence of dependable international air connectivity is therefore not a peripheral inconvenience; it is a structural barrier that amplifies every other economic and security risk facing Haiti.

Restoring international operations at Toussaint Louverture International Airport, while simultaneously modernizing and expanding the capabilities of Cap-Haïtien International Airport, should therefore be understood not as isolated infrastructure projects, but as foundational investments in Haiti's economic recovery and regional integration. Rehabilitating these gateways is essential to restoring investor confidence, supporting export competitiveness, enabling tourism recovery, facilitating humanitarian and development operations, and reconnecting Haiti to international economic flows.

In practical terms, air infrastructure is the entry point to everything else.

### **Ports and Infrastructure as Engines of Territorial Development**

Haiti's productive capacity is structurally constrained by the concentration of economic activity in the Port-au-Prince metropolitan area. The country has multiple international ports: Cap-Haïtien, Saint-Marc, Jacmel, Les Cayes that are underutilized, underequipped, and disconnected from the productive regions they could serve. Seven out of ten regions remain stable and have the geographic and demographic conditions to become viable economic poles. The infrastructure to anchor them does not yet exist at the scale required.

The opportunity is significant. A development model built around modernized ports and adjacent hybrid free zones, combining industrial, logistics, and warehousing functions, would redistribute economic activity away from Port-au-Prince, reduce the country's structural vulnerability to security disruptions in the capital, and create direct entry points for foreign investment across multiple departments simultaneously. Each port becomes an economic hub: a platform for manufacturing, agro-industrial transformation, and export logistics serving both regional and international markets.

Coastal cabotage, maritime transport between Haitian ports, offers a viable and largely unexploited alternative to insecure road networks, enabling goods to move between departments without exposure to the security constraints that have made overland logistics increasingly difficult. The digitization of customs procedures would improve the speed and transparency of trade flows while increasing state revenues and reducing the informal practices that currently deter formal investment.

For European companies, this represents concrete opportunities in port engineering and rehabilitation, industrial zone development and management, logistics infrastructure, customs technology, and trade facilitation services. Haiti's existing trade agreements, including duty-free access to the European market under the Everything But Arms initiative, make export-oriented investment in free zones particularly attractive for companies seeking to diversify their supply chains and access Caribbean and North American markets.

For Haiti, ports are not simply trade infrastructure. They are the foundation on which a

decentralized, investment-driven economy can be built. One department, one hub at a time.

### **Energy - Powering Haiti's Economic Recovery**

Access to reliable electricity is one of the most binding constraints on Haiti's economic development and one of its most significant untapped opportunities. Less than 30% of the population is connected to a stable power supply. Effective production capacity on urban networks stands at approximately 40 MW against an estimated national demand of 500 to 800 MW. Technical and commercial losses exceed 50%. Haiti remains almost entirely dependent on imported fossil fuels, a chronic vulnerability that drives up costs for households and businesses alike, makes the case for renewable energy investment all the more urgent and compelling.

What these figures also reveal is the sheer scale of what remains to be built. Haiti is, in energy terms, an almost entirely open field. The generation infrastructure is largely absent. The transmission network is insufficient and poorly maintained. Distribution is uneven, concentrated in urban centers, and unable to serve the productive regions where agricultural and industrial potential is highest. The commercialization of electricity remains largely informal. Across the entire chain, from production to the end consumer, there is virtually no segment that does not require investment, modernization, or construction from the ground up.

This is precisely what makes Haiti's energy sector compelling for European investors and technology partners. The opportunities span the full value chain: utility-scale renewable energy generation through solar and wind; decentralized micro-grid systems serving isolated communities, small businesses, and agricultural producers; renewable energy infrastructure powering industrial zones and free zone facilities; modernization of transmission and distribution networks; smart metering and commercialization systems; waste-to-energy solutions that simultaneously address Haiti's chronic solid waste crisis and its electricity deficit and technical training programs building the local workforce that a functioning energy sector requires.

Several regions across the country have the geographic conditions - solar irradiation and wind exposure - to support viable renewable energy projects. The north and south of the country in particular offer significant potential for decentralized energy development anchored in local productive activity. These are not marginal opportunities. They are the foundation on which Haiti's broader economic recovery depends.

In a country where almost everything remains to be built, energy is where everything begins.

### **Agriculture & Agribusiness — Connecting Haiti's Agricultural Potential to Global Markets**

Haiti's agricultural base is one of its most underestimated assets. Cacao, coffee, vetiver, mango, avocado, moringa and other commodities are cultivated across the country; largely organic by default, not by policy or deliberate choice, but because the absence of industrial agriculture has preserved traditional growing practices and soil quality over generations. On European markets, where demand for certified organic products continues to rise, this is a competitive advantage of growing significance. The gap between what Haiti produces and what it could supply to regional and international markets is not a question of agricultural potential. It is a question of infrastructure, financing, and market access.

Haiti already benefits from duty-free, quota-free access to the entire European market under the EU's Everything But Arms initiative. The obstacle has never been market access. It is the absence of the conditions that would allow Haitian producers to respond to that access at scale: reliable storage and cold chain infrastructure to reduce post-harvest losses; aggregation and conditioning facilities to meet export quality standards; financing mechanisms that allow smallholder producers to store their harvest rather than sell under pressure at the wrong moment in the market cycle; and logistical connectivity between production zones and export points.

These gaps define the investment landscape. The opportunities span the full agricultural value chain: cold storage and warehousing infrastructure serving multiple producers and commodities; packhouses and conditioning facilities bringing Haitian produce to export standards; aggregation platforms that centralize production from dispersed smallholders and connect it to regional and international buyers; commodity-based financing mechanisms unlocking credit for producers without requiring land as collateral; and integrated export logistics connecting Haiti's agricultural output to Caribbean and European markets.

The cacao and coffee sectors in particular present a consolidation opportunity. Dozens of small and medium enterprises operate independently across the territory, without shared infrastructure, unified quality standards, or coordinated market access. Bringing these actors together into structured, nationally coordinated value chains would create the volume and consistency that international buyers require and that European partners are well positioned to support.

In a world where organic certification has become a premium market requirement, Haiti's agricultural base is already there by default. The investment opportunity is not to create that advantage; it is to finally put it to work.

### **From potential to investment**

Haiti's agricultural base produces commodities that European markets actively seek, without the infrastructure to deliver them at scale. Its coastline offers multiple port nodes that could anchor regional trade, without the investment to make them functional. Its energy potential is vast; solar, wind, across stable regions yet remains almost entirely unexploited. Its population is young, its diaspora is active. Haiti already has full access to the European market for all its products. None of this has translated into sustained economic development, not because the potential isn't there, but because the conditions to activate it never were.

The National Investment Forum on June 29, 2026 is not a pledging conference. It is a working session where Haitian private sector actors, government representatives, and European financial partners sit at the same table to identify what it takes to move from potential to investment, sector by sector, project by project, with next steps agreed before the day is out.

### [Registration & Contact](#)

For more information or to register, please contact us:

Chambre Franco-Haïtienne de Commerce et d'Industrie (CFHCI) — [info@cfhci.ht](mailto:info@cfhci.ht)  
Béatrice Ilias — [beatrice\\_ilias@me.com](mailto:beatrice_ilias@me.com) — +509 3800-3000

Register here: [tinyurl.com/79ebk998](https://tinyurl.com/79ebk998)