



Metro JAX/Northeast Florida EXPORT PLAN GLOBAL CITIES INITIATIVE





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“Exports are a vital tool in helping Jacksonville companies grow and expand. Our city is uniquely positioned as a logistics center, with our strong port, railways and highway systems, to help businesses capitalize on opportunities to drive growth in a global economy. This export plan will help us build on these opportunities to bring even more benefits to Jacksonville and Northeast Florida.”

Jacksonville Mayor Alvin Brown

Our Vision:

“Metro JAX/Northeast Florida will be internationally known as a premier international trade and export region.”

METRO JAX/NORTHEAST FLORIDA AT-A-GLANCE

- ① The Metro JAX/Northeast Florida metropolitan region's population is 1.6 million.
- ② Jacksonville is the western most point on the U.S. Atlantic Coast.
- ③ The Metro/JAX Northeast Florida region consists of seven counties: Baker, Clay, Duval, Flagler, Nassau, Putnam and St. Johns.
- ④ Our region has a diversified economy strengthened by four military bases.
- ⑤ The entire seven-county region is a designated Foreign Trade Zone (FTZ), which helps companies with international business reduce the cost of operations and operate more efficiently.
- ⑥ Fortune 500 companies are headquartered in the region, which has a strong pro-business environment.
- ⑦ Metro JAX/Northeast Florida is internationally known for its advantages in Advanced Manufacturing, Aerospace Technology, Financial Services and Health and Life Sciences.
- ⑧ Our region has two state colleges, one state university and three private universities focused on undergraduate education; and one state research university recognized nationally for patent development and tech transfer.
- ⑨ We are home to the NFL Jacksonville Jaguars, AFL Jacksonville Sharks, Jacksonville Suns AA baseball team, ABA Jacksonville Giants basketball team, The Players Championship and NASL Armada FC soccer team.
- ⑩ We have more than 90 miles of beaches, great year-round weather and a quality of life that rivals any region in the U.S.
- ⑪ Our modern transportation infrastructure includes 10 airports, an FAA-licensed horizontal-launch spaceport, two deep water ports and four marine terminals, a strong network of railways and access to major roadways and interstates.
- ⑫ Our major deep water port, JAXPORT, has three marine terminals that handle 8 million tons of cargo each year, including more than 600,000 vehicles. It also supports more than 132,000 jobs in the region and generates \$27 billion in annual economic impact.
- ⑬ Our region exports \$4.5 billion in goods and services annually.



GLOBAL CITIES INITIATIVE

In November 2013, Jacksonville Mayor Alvin Brown and key stakeholders launched a comprehensive international trade and commerce strategy for the Metro JAX/Northeast Florida region. The team was selected to participate in the Global Cities Initiative (GCI), a five-year joint project of Brookings and JPMorgan Chase. The goal of the initiative is to help key U.S. metropolitan regions strengthen their economies through greater engagement in world markets, with a focus on exports.

The ongoing objective of the Metro JAX/Northeast Florida Global Cities Initiative is to bring together the region's trade, economic development, business and political leaders to boost exports of locally produced goods and services.

Historically, most Metro JAX/Northeast Florida companies, particularly **small- and medium-sized businesses**, have not focused on selling their goods or services overseas. Just 7.4 percent of the region's economy is derived from exports, ranking the region well below the national average of 13.2 percent, according to Brookings.

This effort will specifically focus on **small- and medium-sized businesses**; encouraging them to consider and evaluate export opportunities as a growth strategy and connecting them to the export infrastructure needed to succeed.

Recent regional trends suggest export opportunities abound for those companies looking to expand beyond their traditional domestic markets.

Increasingly, the region is earning a global reputation by attracting a number of international companies, including the French battery manufacturer Saft, Deutsche Bank AG and Brazilian aircraft manufacturer Embraer. In the past 10 years, 85 companies from 24 countries have opened offices in the region, according to JAXUSA Partnership, the region's lead economic development agency.

In the past decade, Jacksonville's port has attracted 12 of the 18 largest global shipping lines and is now served by 40 major cargo services. In addition, the port has increased East/West trade connections and seen an average of nearly 30 percent annual growth in Asian container traffic in each of the past five years. The port is ideally suited to support an invigorated export strategy for the region.

Additionally, Metro JAX/Northeast Florida is quickly establishing its position as a national and international leader in the production and exportation of liquefied natural gas, or LNG.

The region's exporting sector got a lift in 2014 with the announcement that GE Oil & Gas will invest \$50 million to build an equipment manufacturing facility that will strengthen ties to international markets. Meanwhile, Jacksonville Jaguars owner Shad Khan has helped the NFL 'export' American football overseas with a commitment to play four of the Jaguars home games in London over a four-year period.

As Metro JAX/Northeast Florida continues its historic trend of 2 percent annual population growth, the local economy will need new strategies to create jobs. Export-led growth is a viable and underdeveloped strategy that will see great benefit in Northeast Florida.

Therefore, in addition to traditional job creation efforts, regional elected officials and economic development professionals need to strengthen their focus on the job-creating potential of exporting, and this plan will help them do so.

MARKET ASSESSMENT

The Metro JAX/Northeast Florida Export Initiative Team instituted a multifaceted strategy of data analysis, online surveys, face-to-face interviews and focus groups involving regional business leaders to gain market information and insight into the export experiences of metro businesses.



THE ASSESSMENT PROCESS

The Metro JAX/Northeast Florida GCI team began by conducting an in-depth Market Assessment of export activity in the region to establish a baseline for building the strategic plan. Team members, including representatives of Mayor Brown's administration, regional economic development officials, private business leaders, higher education, and international business leaders, surveyed 108 area companies and conducted follow-up focus group sessions with 27 businesses.

Respondents to the survey represented a cross section of the region's industries, including aerospace/aviation, construction, transportation/logistics and information technology. The Market Assessment results are intended to illuminate current export activity and practices and to build a base of knowledge from which to begin creating strategies and programs to foster and promote exports in the Metro JAX/Northeast Florida region.

The survey highlighted several benefits of exporting:

- Higher revenue
- Faster growth
- New market opportunities
- Market diversification

KEY FINDINGS

Jacksonville is under-performing on exports

Exports of locally produced goods and services account for 7.4 percent of the region's total economic output, below the national average of 13.2 percent. At the same time, only one-third of the region's businesses are now involved in exporting. This gap represents the magnitude of opportunity for the region.

Regional companies that export grow faster than non-exporters

The survey found that companies engaged in exporting experienced higher sales growth

rates, regardless of size. This is particularly true with medium-sized companies – those with annual sales between \$1 million and \$100 million. **Sales at medium-sized companies that export are growing approximately 34 percent annually.** By comparison, sales at

medium-sized companies that do not export are growing at just 5 percent a year. Medium-sized companies in the region that export also employ more people on average: 72 vs. 43. This is consistent with findings from national research.

Service industries are already strong export performers

Many area businesses mistakenly think that the ports of Jacksonville and Fernandina are sufficient to create a dynamic environment for exporting. When the public thinks of exports we typically imagine manufactured goods, raw materials and agricultural products.

But services such as medical treatment, tourism by foreigners and banking are also categorized as exports. In fact, four of the top 10 exports by dollar volume in Metro JAX/Northeast Florida are service industries – Tourism, Financial Services, Freight and Port Services and Management and Legal Services.

General lack of knowledge of foreign markets and exporting know-how are the biggest barriers to exporting

An overwhelming number of focus group participants see a lack of knowledge, skills and abilities as barriers to successfully creating export markets. Additionally, too many local businesses don't think exporting will help them increase their revenues and growth, so they don't invest in resources needed to export successfully.



Businesses noted a need for an improved export support system to help them go global

A thriving export economy requires export finance, legal and marketing expertise, all of which will be needed to increase export activity.

“There’s a lot of capacity to grow international financial services, trade and logistics programs... all of the support framework necessary for the region’s exporters to thrive.” – George Gabel, Partner at Holland & Knight

Unique services, brands or products help lead to export success

Metro JAX/Northeast Florida companies with unique selling propositions, whether it’s specialized services, one-of-a-kind products or protected intellectual property, experience exporting success.

“Our customers come to us from around the world for medical expertise and a level of services that they can’t receive in the countries where they live.” – Robert Brigham, former Chief Administrative Officer, Mayo Clinic Jacksonville

Most companies think too short-term to export successfully

Successful exporters say their success depends on long-term investment, patience and persistence to build strong long-term relationships in foreign markets. As one participant in the Market Assessment focus groups succinctly put it: **“Relationships lead to deals.”**

“Exporting is a marathon, not a sprint. But the long-term benefits for the region are clear. This is our moment to capitalize on positive global trade trends.” – Jorge Arce, Jacksonville Director, U.S. Commercial Service



FlightStar, Cecil Airport

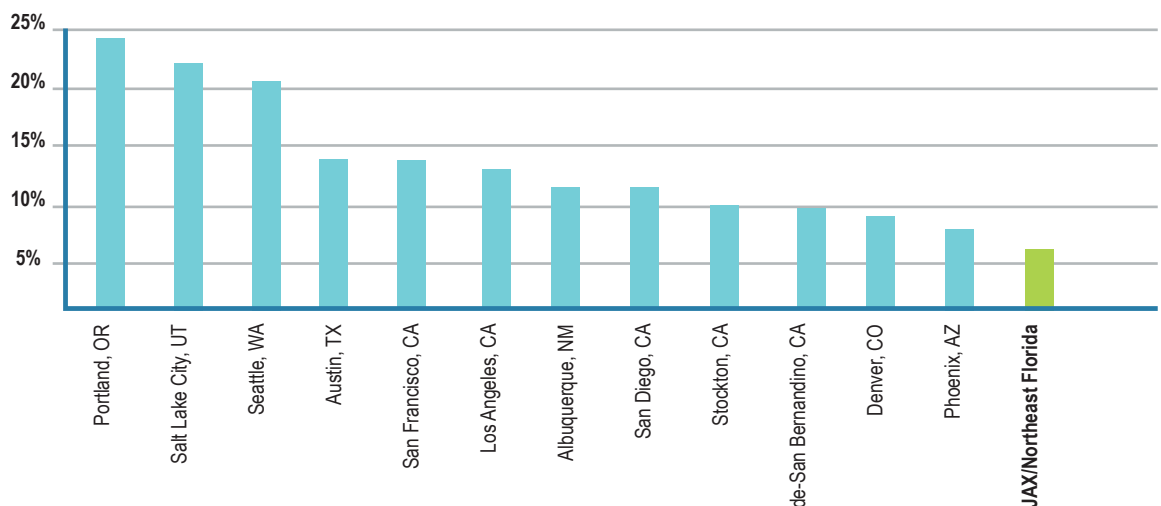


Mayo Clinic, Jacksonville



AET, Green Cove Springs

Metro JAX/Northeast Florida Export Intensity Rating



Source: Brookings analysis of data from Census, BEA, BLS, IRS, Moody’s Analytics and NAFTA

THE CASE FOR EXPORTS IN NORTHEAST FLORIDA

Metro JAX/Northeast Florida has a significant opportunity and the right assets to expand its economy through exports.

Global trade, especially in emerging markets, is growing at a faster rate than U.S. markets.

U.S. exporting businesses generally pay 15 percent higher wages and grow 15 percent faster than non-exporters.

Community benefits: For every \$1 billion in exports an estimated 5,690 new jobs are created. In other words, \$178,884 in exports revenue produces one additional job.

Continued projected population growth in Metro JAX/Northeast Florida will require new strategies like exporting to create new jobs in the region and maintain economic growth.

However, in terms of export activity, Metro JAX/Northeast Florida is ranked 91st among the top 100 U.S. metropolitan areas.

If Metro JAX/Northeast Florida can increase exports to meet the national average of export intensity, that would potentially result in additional billions of dollars in economic benefit and create thousands of new jobs.

Metro JAX/Northeast Florida Export Rankings

EXPORTS,
BILLIONS, 2012

\$4.5

RANK, TOP 100 METROS

67

EXPORTS SHARE OF
METRO OUTPUT, 2003

4.7%

RANK, TOP 100 METROS

93

ANNUALIZED EXPORT
GROWTH RATE,
2003- 2008

9.4%

RANK, TOP 100 METROS

33

ANNUALIZED EXPORT
GROWTH RATE,
2009- 2012

3.9%

RANK, TOP 100 METROS

84

EXPORTS SHARE OF
METRO OUTPUT, 2012

7.4%

RANK, TOP 100 METROS

91

ANNUALIZED
REAL OUTPUT
GROWTH RATE, 2009-2012

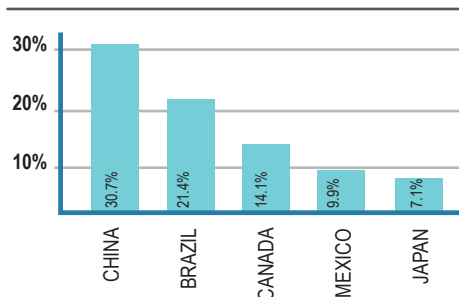
0.7%

RANK, TOP 100 METROS

86

Metro JAX/Northeast Florida Export Rankings

TOP FIVE EXPORT MARKETS



TOP FIVE GOODS EXPORTING INDUSTRIES, BY VALUE AND SHARE OF METRO EXPORTS, 2012

TOTAL GOODS EXPORTS: \$2.1 BILLION

AIRCRAFT PRODUCTS & PARTS · \$349.30 MILLION · 7.7%

MEDICAL EQUIPMENT & SUPPLIES · \$290.00 MILLION · 6.4%

PAPER PRODUCTS · \$133.90 MILLION · 2.9%

NONFERROUS METAL PRODUCTS · \$124.60 MILLION · 2.7%

BEVERAGE PRODUCTS · \$100.20 MILLION · 2.2%

TOP FIVE SERVICES EXPORTING INDUSTRIES, BY VALUE AND SHARE OF METRO EXPORTS, 2012

TOTAL SERVICES EXPORTS: \$2.5 BILLION

FINANCIAL SERVICES · \$440.50 MILLION · 9.7%

FREIGHT & PORT SERVICES · \$304.90 MILLION · 6.7%

GROUND TRANSPORTATION SERVICES · \$186.40 MILLION · 4.1%

MANAGEMENT & CONSULTING · \$178.70 MILLION · 3.9%

ACCOMMODATION SERVICES · \$170.10 MILLION · 3.7%



METRO JAX/Northeast Florida EXPORT PLAN

GOAL:

The Metro JAX/Northeast Florida Global Cities Initiative seeks to double the region's export activity, as measured by our regional Export Index, over the next five years.

OBJECTIVES:

The Metro JAX/Northeast Florida Export Initiative team has identified four primary objectives to guide its work:

- ① Create quality, high-wage jobs through increased export activity
- ② Assist in meeting the employment demands of a growing region
- ③ Leverage existing trade and logistics resources
- ④ Build a global mind-set by stimulating interest in global trade and international markets

FOUR CORE STRATEGIES:

Building upon the research and analysis of the Export Initiative core team and steering committee, Metro JAX/Northeast Florida will execute the following short- and long- term strategies to meet those stated objectives.



These strategies reflect the region’s existing strengths and opportunities.

As stated in the Market Assessment, Metro JAX/Northeast Florida is geographically well located and is home to a robust transportation and logistics industry. However, exports of local products and services are currently an underrepresented component of the overall economy. Primary factors are a general lack of knowledge about global trade and foreign markets as well as exporting know-how.

The Metro JAX/Northeast Florida Export Plan strives to address those hurdles through a multi-phase campaign that builds excitement around developing a new global mind-set for the region, while at the same time providing “boots-on-the-ground” assistance to those companies seeking to expand their export sales or enter the world of exporting for the first time.

STRATEGY 1:

BUILD EXPORT AWARENESS THROUGHOUT THE REGION

Opportunity:

While the Metro JAX/Northeast Florida region has a vibrant transportation and logistics sector that carries goods in and out of the city, some area companies have not focused on exporting their goods or services. In order to boost exports, the region needs to adopt an international viewpoint. A key driver of the Export Plan: Global trade, especially in emerging markets, is growing at a faster rate than U.S. markets. Many companies in the Metro JAX/Northeast Florida region will need to look offshore for new growth to stay competitive and ensure long-term stability.

TACTICS

- 1** Establish an Export Advocacy Team, a group dedicated to leading, promoting and monitoring Metro JAX/Northeast Florida’s export and international trade efforts. The advocacy team will monitor the plan’s achievements and modify strategies and tactics as needed.
- 2** The team will push to reinvigorate the Northeast Florida Chapter of the Florida District Export Council (DEC), which includes the Metro JAX/Northeast Florida region, in order to more effectively assist in coordinating increased export activity throughout the region.
- 3** Engage local governments, resource partners, industry trade associations and the region’s chambers of commerce to join in the mission of advocating for increased international trade and commerce and spreading the message of the economic benefits of exporting.

STRATEGY 2:

ALIGN EXISTING EXPORT SUPPORT RESOURCES WITH EXPORT PLAN

Opportunity:

Metro JAX/Northeast Florida has a number of high-quality international trade resources, including the Florida Small Business Development Center at the University of North Florida; a local office of Enterprise Florida, the statewide public-private economic development organization; and, the regional office of the U.S. Commercial Service, the international trade arm of the U.S. Department of Commerce's International Trade Administration. In addition, there are active civic and cultural organizations such as Jacksonville Sister Cities Association (a member of Sister Cities International), World Affairs Council and Global Jax that seek to build better understanding and relationships between the region and the rest of the world. As the Metro JAX/Northeast Florida Export Advocacy Team looks to create a dynamic international ethos, it will be important to bring together these various international and export-oriented organizations, along with regional economic development agencies, as a cohesive group.

TACTICS

- 1 Update "Innovate Northeast Florida," the region's economic development strategic plan, to reflect the growing importance of international trade and exports to our economy to include a specific strategy for international trade and exports. The Metro JAX/Northeast Florida export initiative will be greatly assisted by the inclusion of international trade and commerce as an added strategic focus of Innovate Northeast Florida, a collaborative strategic planning process of the JAXUSA Partnership and the Northeast Florida Regional Council.
- 2 Create a one-stop portal for businesses seeking international trade information and assistance that will receive inquiries from prospective exporting businesses, assess the level of assistance required and refer the business to the appropriate member of the Advocacy Team.
- 3 Create a Metro JAX/Northeast Florida Export Directory that will serve as a digital resource guide for businesses looking to export.
- 4 Encourage regional financial and legal services entities to provide capital finance to support export activities, i.e. Export-Import Bank and Small Business Administration programs, Florida Export Finance Corporation and others to provide legal advice regarding international and export matters.
- 5 Evaluate the feasibility of reactivating a World Trade Center in Jacksonville to serve as a central location and focal point for the region's international trade and export initiatives.
- 6 Work with the Jacksonville Aviation Authority to identify potential users of air cargo shipments and promote the advantages of exporting regionally produced products via air from Cecil Airport.

STRATEGY 3

MOTIVATE MORE AREA COMPANIES TO EXPORT

Opportunity:

As the Market Assessment revealed, perhaps as many as two-thirds of Metro JAX/Northeast Florida companies are not engaged in export activities. Most expressed limited interest or knowledge as reasons for not engaging in the export of products or services.

TACTICS

- 1 Build a mentor-protégé program that matches export newcomers with experienced exporters and international trade experts in the region. The Export Advocacy Team will identify emerging small and medium enterprises (SME) prospects and recruit seasoned exporters to join a mentor-protégé export development program.
- 2 Engage successful exporters as ambassadors to champion the benefits of international trade to non-exporting businesses. Drive home the message that export opportunities are also available to service-oriented businesses, including professional services, tourism and education.
- 3 Build an export assistance concierge program specifically designed for **small- and medium-sized businesses**, augmenting existing resources like those at the Small Business Development Center at UNF.
- 4 Create an internship program, in conjunction with area colleges and universities that leverages highly motivated students and professionals to assist companies with developing export strategies and plans. This provides an affordable workforce resource for emerging exporters, while also developing future international trade experts for the region.
- 5 Encourage City of Jacksonville and other regional economic development entities to explore the possibility of creating an 'export' incentive program to support **small- and medium-sized businesses** based in the region that want to export.
- 6 Utilize and help promote the U.S. Commercial Service Jacksonville office. (The U.S. Commercial Service is part of the U.S. Department of Commerce's International Trade Administration.) The office's Gold Key Service provides fee services such as overseas matchmaking for "export ready" companies, international partner searches and background and credit checks on foreign companies. The Commercial Service also provides free services, including export ready assessments, website design for the global marketplace and access to www.export.gov, a robust export portal with information on trade statistics, international logistics and international finance.
- 7 Utilize and promote the many resources available through Enterprise Florida, the state's public-private economic development organization, including export counseling, overseas trade missions and trade show, the online Florida Export Directory, export finance options and assistance with developing export marketing plans.

STRATEGY 4

BOOST INTERNATIONAL AWARENESS AND GLOBAL REPUTATION

Opportunity:

In recent years, Jacksonville and Northeast Florida have made noticeable strides toward developing a global reputation. From Jacksonville Jaguars ‘home’ games played in London to Embraer opening an aircraft assembly facility at Jacksonville International Airport to French battery manufacturer Saft building a state-of-the-art lithium ion battery plant at Cecil Commerce Center, Metro JAX/Northeast Florida is projecting a positive image overseas. To continue building on this momentum and pave the way to new markets for regional companies, a strong global brand for the region is imperative. The singular objective is to make Jacksonville the business market of choice in Florida.

TACTICS

- 1 Enlist public and private entities to create and strengthen international relationships. Leverage existing international relationships, including those of Jaguar’s owner Shad Khan, JAXPORT and JAX Chamber, to include opportunities to promote JAX/Northeast Florida products and services to overseas markets.
- 2 Involve local governments, educational institutions and professional associations in developing overseas networks encouraging export business. Work with Jacksonville Sister Cities Association to include promotion of trade and export opportunities with Jacksonville’s eight Sister Cities and three Friendship Cities.
- 3 Establish programs for middle- and high-school students and educators around the region that highlight the importance of international trade and commerce and begin the process of creating a global mind-set among the region’s next-generation workforce.
- 4 Establish an annual international trade summit – either de novo or in partnership with an existing event – dedicated to promoting the benefits of exporting. Help focus the region’s attention of global trade.
- 5 Partner with existing and emerging branding and marketing campaigns such as the Logistics Advisory Group’s ‘America’s Logistics Center’ theme and Visit Jacksonville’s ‘Medical Tourism’ promotion to international visitors.

Florida’s strategic positioning and abundance of resources make it a prime location for trade. Research shows that more than 95% of Florida exporters are **small-to medium-sized businesses** with fewer than 20 employees. Florida small business exporters produce two-thirds of Florida’s total export value to over 200 countries and are responsible for 18% of the state’s economy. The Global Cities Initiative will specifically focus on **small-and medium-sized businesses**; encouraging them to consider and evaluate export opportunities as a growth strategy and connecting them to the export infrastructure needed to succeed.

PERFORMANCE MEASURES

The Metro JAX/Northeast Florida Global Cities Initiative Team will release an annual regional export survey to the community that measures progress and outcomes based on a specific export index. The Metro JAX/Northeast Florida Export Index will be used in conjunction with analysis provided by the Brookings Export Nation reports, Enterprise Florida trade data and other relevant international trade and export data.

REGIONAL EXPORT INDICATORS:

- ▶ Total foreign sales
- ▶ Total foreign goods/services sold
- ▶ Output per export job
- ▶ Share of local businesses that export
- ▶ Export as percent of regional GMP/GDP
- ▶ Employees in export companies
- ▶ Total foreign students
- ▶ International visitation
- ▶ Patient cases and revenue from hospital procedures sold to foreign nationals
- ▶ Number of new markets
- ▶ Number of new export countries
- ▶ Number of new companies participating in trade missions

POLICY PLAN

States, metros and cities often focus on reducing regulatory and tax burdens to attract new development. While our region will continue to pursue these policy initiatives, we also recognize that 80 percent of the world's purchasing power is now outside the U.S. Consequently, further company growth and employment opportunities will likely come from customers in global markets.

Key issues that Metro JAX/Northeast Florida will consider advocating for include:

- ① Free Trade Agreements to Reduce Barriers
- ② Increased Support for Trade Missions
- ③ Reauthorization of the Export/Import Bank
- ④ Continued Support for State Funding of Enterprise Florida
- ⑤ Local Government Export Incentive Programs



IMPLEMENTATION

The City of Jacksonville Office of Economic Development will oversee the implementation of the Export Plan, in partnership with JAXUSA and with the participation of key regional stakeholders, which will meet quarterly to track key performance indicators included in our regional Export Index.

PARTNER ORGANIZATIONS ASSISTING IN IMPLEMENTATION INCLUDE:

- ▶ U.S. Department of Commerce, Jacksonville Office
- ▶ Enterprise Florida, Jacksonville Office
- ▶ Florida Small Business Development Center at University of North Florida
- ▶ Jacksonville University
- ▶ Jacksonville Port Authority
- ▶ Jacksonville Aviation Authority
- ▶ First Coast Manufacturers Association
- ▶ Jacksonville Women's Business Center
- ▶ Visit Jacksonville
- ▶ Metro JAX/Northeast Florida's Local Economic Development Organizations:
 - ▶ Baker County Chamber of Commerce
 - ▶ Clay County Economic Development Corporation
 - ▶ Flagler County Department of Economic Opportunity
 - ▶ Nassau County Economic Development Board
 - ▶ St. Johns County Economic Development Office
 - ▶ Putnam County Economic Development Corporation

Metro JAX/Northeast Florida Existing International Brands At-A-Glance



Deutsche Bank



EMBRAER



RULON INTERNATIONAL



ENKEI



Ring Power®



HASKELL

RS&H



Mitsui O.S.K. Lines



stellar
TAKING SOLUTIONS FURTHER®



VAC-CON
MORE POWER TO YOU

EXPORT RESOURCES

Florida Small Business Development Center at University of North Florida

www.sbdc.unf.edu

Contact: Katie Arroyo

k.arroyo@unf.edu

U.S. Commercial Service – Jacksonville (USEAC: U.S. Export Assistance Center)

www.export.gov/florida

Contact: Jorge Arce

Jorge.arce@trade.gov

Enterprise Florida

www.enterpriseflorida.com/international/

Contact: Larry Bernaski

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JAXUSA Partnership

www.jaxusa.org

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Brian Taylor
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General Manager SBG, CEO/President
Saft America, Inc.

Jorge Arce
Director of the Jacksonville Office of the U.S.
Commercial Service

Oliver Barakat
Chair, Downtown Investment Authority (Jacksonville)

Greg Beliles
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JPMorgan Chase

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A Joint Project of Brookings and JPMorgan Chase



Office of the Mayor
Alvin Brown

JPMORGAN CHASE & Co.

About:

The Global Cities Initiative is a joint project of the Brookings Institution and JPMorgan Chase to help metropolitan private and public sector leaders grow their regional economies by strengthening international connections and competitiveness through exports, foreign investment, and other strategies. GCI activities include producing research and data for better decision-making, fostering policy and practice innovations, and promoting collaboration and replication through a peer learning network. For more information, see <http://www.brookings.edu/projects/global-cities.aspx> or www.jpmorganchase.com/globalcities.

GCI/GCX disclaimer:

This report was developed by Metro Jax/Northeast Florida Global Cities Initiative through the collaboration of political, business, and civic leaders of Metro Jax/Northeast Florida region. The conclusions and recommendations of this report are solely those of its authors and do not reflect the views of the Brookings Institution or JPMorgan Chase. The Brookings Institution is a private non-profit organization. Its mission is to conduct high-quality, independent research and, based on that research, to provide innovative, practical recommendations for policymakers and the public. Brookings recognizes that the value it provides is in its absolute commitment to quality, independence and impact, and makes all final determinations of the scholarly activities in the Global Cities Initiative, including the research agenda and products.

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