FACILITATING BUSINESS INVESTMENT IN THE UNITED STATES AND WYOMING

SelectUSA
Global Markets
International Trade Administration
U.S. Department of Commerce
Our Mission

SelectUSA’s mission is to promote and facilitate business investment in the United States. We are the single point of contact at the national level for international and domestic companies to invest in the United States.
The United States is the Largest Recipient of Foreign Direct Investment

$26.7 Trillion

Source: United Nations Conference on Trade and Development
http://unctadstat.unctad.org/
FDI Benefits the U.S. Economy

#1 The United States is home to more foreign direct investment than anywhere else in the world

Nearly a Quarter of U.S. Exports In 2016, U.S. subsidiaries of foreign-owned firms accounted for nearly 1/4 of all U.S. goods exports

More Than 13 Million U.S. Jobs In 2016, subsidiaries directly employed 6.8 million U.S. workers (plus 6.6 million indirectly)

Average Annual Compensation $79,040 In 2016, subsidiaries paid wages that averaged more than $79,000 (as opposed to the national average of $63,585)

R&D Investments In 2016, subsidiaries spent $57 billion in research and development in the United States

Source: Department of Commerce, Bureau of Economic Analysis – FDI by majority foreign-owned firms, UNCTADStat
## Largest Sources of FDI in the United States (by UBO)

<table>
<thead>
<tr>
<th>Rank</th>
<th>Market</th>
<th>2016 Position (in USD millions)</th>
<th>Share of total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>United Kingdom</td>
<td>$598,319</td>
<td>16.1%</td>
</tr>
<tr>
<td>2</td>
<td>Canada</td>
<td>$453,641</td>
<td>12.2%</td>
</tr>
<tr>
<td>3</td>
<td>Japan</td>
<td>$424,347</td>
<td>11.4%</td>
</tr>
<tr>
<td>4</td>
<td>Germany</td>
<td>$372,778</td>
<td>10.0%</td>
</tr>
<tr>
<td>5</td>
<td>Ireland</td>
<td>$279,647</td>
<td>7.5%</td>
</tr>
<tr>
<td>6</td>
<td>France</td>
<td>$267,573</td>
<td>7.2%</td>
</tr>
<tr>
<td>7</td>
<td>Switzerland</td>
<td>$196,595</td>
<td>5.3%</td>
</tr>
<tr>
<td>8</td>
<td>The Netherlands</td>
<td>$191,937</td>
<td>5.2%</td>
</tr>
<tr>
<td>9</td>
<td>Singapore</td>
<td>$73,677</td>
<td>2.0%</td>
</tr>
<tr>
<td>10</td>
<td>Spain</td>
<td>$67,179</td>
<td>1.8%</td>
</tr>
<tr>
<td>11</td>
<td>China</td>
<td>$58,154</td>
<td>1.6%</td>
</tr>
<tr>
<td>12</td>
<td>Belgium</td>
<td>$55,940</td>
<td>1.5%</td>
</tr>
<tr>
<td>13</td>
<td>Israel</td>
<td>$55,362</td>
<td>1.5%</td>
</tr>
<tr>
<td>14</td>
<td>Australia</td>
<td>$54,307</td>
<td>1.5%</td>
</tr>
<tr>
<td>15</td>
<td>Sweden</td>
<td>$52,730</td>
<td>1.4%</td>
</tr>
</tbody>
</table>

## Fastest-Growing Sources of FDI in the United States (by UBO)

<table>
<thead>
<tr>
<th>Rank</th>
<th>Market</th>
<th>2016 Position (in USD millions)</th>
<th>CAGR 2011-2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Thailand</td>
<td>$2,082</td>
<td>55.5%</td>
</tr>
<tr>
<td>2</td>
<td>Argentina</td>
<td>$4,935</td>
<td>46.4%</td>
</tr>
<tr>
<td>3</td>
<td>China</td>
<td>$58,154</td>
<td>44.7%</td>
</tr>
<tr>
<td>4</td>
<td>Singapore</td>
<td>$73,677</td>
<td>36.9%</td>
</tr>
<tr>
<td>5</td>
<td>Chile</td>
<td>$2,614</td>
<td>30.4%</td>
</tr>
<tr>
<td>6</td>
<td>Ireland</td>
<td>$279,647</td>
<td>28.1%</td>
</tr>
<tr>
<td>7</td>
<td>Brazil</td>
<td>$36,869</td>
<td>24.1%</td>
</tr>
<tr>
<td>8</td>
<td>Israel</td>
<td>$55,362</td>
<td>21.3%</td>
</tr>
<tr>
<td>9</td>
<td>Turkey</td>
<td>$1,290</td>
<td>17.2%</td>
</tr>
<tr>
<td>10</td>
<td>Greece</td>
<td>$1,057</td>
<td>16.2%</td>
</tr>
<tr>
<td>11</td>
<td>Bermuda</td>
<td>$33,460</td>
<td>16.2%</td>
</tr>
<tr>
<td>12</td>
<td>Belgium</td>
<td>$55,940</td>
<td>14.7%</td>
</tr>
<tr>
<td>13</td>
<td>South Korea</td>
<td>$38,750</td>
<td>14.4%</td>
</tr>
<tr>
<td>14</td>
<td>Denmark</td>
<td>$17,726</td>
<td>13.0%</td>
</tr>
<tr>
<td>15</td>
<td>Canada</td>
<td>$453,641</td>
<td>12.9%</td>
</tr>
</tbody>
</table>

Source: Bureau of Economic Analysis. UBO refers to Ultimate Beneficial Owner. CAGR refers to Compound Annual Growth Rate. Fastest-Growing Sources of FDI ranks markets with 2016 FDI stock in the United States greater than $1 billion.
7,900 jobs in Wyoming are at majority foreign-affiliated companies.

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# About SelectUSA

## Our Team

- 1,400 U.S. Department of Commerce Employees Worldwide

## Our Clients

- Existing and Potential Business Investors
- U.S. Economic Development Organizations (YOU!)

## Our Impact

To date, SelectUSA has directly assisted in attracting over **$44 billion** in client-verified investments into the United States.

Companies that have participated in the SelectUSA Summit have invested over **$93 billion** in the United States.
How SelectUSA Can Help

- **ACTIONABLE INFORMATION** on business investment in the United States and developing an FDI strategy.

- **PLATFORM FOR CONNECTIONS** that will provide in-depth, on-the-ground expertise and guidance at a local level.

- **NAVIGATING THE FEDERAL SYSTEM** to help with questions or concerns about U.S. federal rules and regulations.

- **INVESTMENT PROJECT ADVOCACY** to promote the United States in international competition.
**SHARED USA PAVILION OR BOOTH AT TRADE SHOWS**

Trade shows or conferences provide participating EDOs a suite of fee-base services, making it easier to promote in foreign markets.

◊ Examples: Investment Pavilion at Hannover Messe Tradeshow
◊ Multiple EDOs participate

**FACILITATED INVESTMENT MISSION**

Visit one or more cities abroad to pitch your state to investors, engage in matchmaking meetings.

◊ Examples: India Road Show
◊ Multiple EDOs participate

**SINGLE LOCATION PROMOTION SERVICE**

Tailor-made events developed collaboratively, promoting individual U.S. jurisdictions as FDI destinations. Led by U.S. Embassy staff.

◊ Example: Maryland Economic Development mission to Brazil
◊ A single U.S. location participates
◊ SelectUSA promotes the United States
“Top Ten” Ways SelectUSA Can Support EDOs

1. Provide timely advice and support to EDOs on developing an FDI Attraction Strategy and Action Plan. These leverage data on foreign direct investment, including lists of foreign investors that have invested in your priority sectors.

2. Share real investment leads that we receive from foreign investors looking for places to invest in the U.S.

3. Offer EDOs our Single Location Promotions services where our Embassy staff overseas organize meetings, seminars or receptions for a low fee, often as part of Trade and Investment Missions.

4. Give EDOs information on how to participate in and leverage our Investment Promotion Road Shows overseas. These are Facilitated Group Investment Missions overseas for groups of 5 to 15 EDOs and have matchmaking meetings with investors, EDO presentations, and networking receptions.

5. Help EDOs become part of the USA Pavilion at overseas trade shows and industry events or industry association seminars where the SelectUSA team has a investment promotion presence.
6. Help EDOs organize and host **Spin off Investment Tours** in your city/state for investors that plan to participate in our annual Summit.

7. Provide **customized resource research reports** for foreign investor clients of EDOs free of charge, which are done on a geographically neutral manner (not favoring any one state or city).

8. Make **introductions to multiplier organizations** such as commercial officers in foreign embassies and foreign industry associations or chambers of commerce, as well as introductions to key staff in our Embassies.

9. Help EDOs **resolve investor issues** related to federal government regulations or agencies, through our Investor Ombudsman Services.

10. Help EDOs participate in the annual **SelectUSA Investment Summit** by attending or having a visible booth, impactful presentation, and matchmaking meetings with high-potential investors.
JSW Steel, NewCold, Re:Cognition Health, and Weastec, announced expansions in the United States, projects worth more than $600 million and creating approximately 65 new jobs.
2019 Summit: June 10-12 in Washington, DC

Past attendees of SelectUSA have announced nearly $93 billion in new investment projects, which support 140,000 American jobs.
In 2017 over 6,600 unique clients from 50 states, 3 territories, and 84 international markets received SelectUSA Services.

Since inception, SelectUSA has facilitated over **$44 billion** in client verified investment, supporting thousands of U.S. jobs.

In FY17, SelectUSA clients represent **21.3%** of all greenfield investment in the United States.
2016 FDI IN THE UNITED STATES
Breakout of $3.7 Trillion Inward Position

- Manufacturing, $1.53T, 41%
- Banking, Finance & Insurance, $695.4B, 19%
- Other industries, $591.6B, 16%
- Information, $185.8B, 5%
- Professional, scientific, and technical services, $197.9B, 5%
- Retail trade, $72.4B, 2%
- Real estate and rental and leasing, $82.3B, 2%
- Wholesale trade, $367.6B, 10%
WHY INVEST in the United States?

- World’s most attractive consumer market
- $18 trillion annual GDP - 320 million people
- Free trade agreements with 20 nations
- Transparent, fair, and stable business environment
- Unparalleled climate for innovation
- Strong intellectual property protections
Investor Services: Actionable Information

Research & Resources for Firms

U.S. LOCATIONS AND RESOURCES REPORT

Prepared by SelectUSA
October 2016

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Investor Services: Actionable Information

**Example: Medical Devices Specialization Cluster Map**

Interactive database with over 50 million open data records on industry clusters and sub-clusters.

Comparable at the State, economic area, metropolitan area or county level.

Source: [U.S. Cluster Mapping Project](http://www.clustermapping.us), Institute for Strategy and Competitiveness, Harvard Business School. [Data Sources](http://www.clustermapping.us)
Investor Services: Actionable Information

**Example: Comparing Regions**

<table>
<thead>
<tr>
<th>San Antonio-New Braunfels, TX Metro Area</th>
<th>Nashville-Davidson--Murfreesboro--Franklin, TN Metro Area</th>
<th>Detroit-Warren-Dearborn, MI Metro Area</th>
</tr>
</thead>
</table>

**Demographic Statistics**

<table>
<thead>
<tr>
<th>Population</th>
<th>San Antonio-New Braunfels, TX Metro Area</th>
<th>1,730,515</th>
<th>4,292,647</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>2,239,222</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Age</th>
<th>San Antonio-New Braunfels, TX Metro Area</th>
<th>1,730,515</th>
<th>4,292,647</th>
</tr>
</thead>
<tbody>
<tr>
<td>21 Years to 24 Years</td>
<td>130,843 (5.84%)</td>
<td>97,437 (5.63%)</td>
<td>214,816 (5.00%)</td>
</tr>
<tr>
<td>25 Years to 34 Years</td>
<td>321,352 (14.30%)</td>
<td>253,645 (14.67%)</td>
<td>514,073 (11.90%)</td>
</tr>
</tbody>
</table>

**Workforce & Training Statistics**

<table>
<thead>
<tr>
<th>Civilian Labor Force</th>
<th>San Antonio-New Braunfels, TX Metro Area</th>
<th>1,730,515</th>
<th>4,292,647</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>1,066,963 (63.40%)</td>
<td>911,132 (67.09%)</td>
<td>2,132,526 (62.56%)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Annual Median Wage</th>
<th>San Antonio-New Braunfels, TX Metro Area</th>
<th>1,730,515</th>
<th>4,292,647</th>
</tr>
</thead>
<tbody>
<tr>
<td>Construction and Extraction</td>
<td>$34,140</td>
<td>$36,160</td>
<td>$50,470</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Labor</th>
<th>San Antonio-New Braunfels, TX Metro Area</th>
<th>1,730,515</th>
<th>4,292,647</th>
</tr>
</thead>
<tbody>
<tr>
<td>Right to Work State?</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Minimum Wage</td>
<td>Texas ($7.25)</td>
<td>Tennessee ($7.25)</td>
<td>Michigan ($8.50)</td>
</tr>
</tbody>
</table>
Investor Services: Actionable Information

State Business Incentives

• U.S. states and territories offer financial and other incentives to foreign investors.

• To easily browse state investment promotion agencies and learn more about available incentives, simply visit www.selectusa.gov/programs-and-incentives.
INTERAGENCY INVESTMENT WORKING GROUP

“The Working Group shall coordinate activities to promote business investment and respond to specific issues that affect business investment decisions”

Over 20 IIWG participating agencies, including:

- Department of State
- DHS
- SBA
- Ex-Im Bank
- USTR
- DOE
- DOD