

The Economic Landscape: Fundamental Trends Impacting Business Opportunities in Florida

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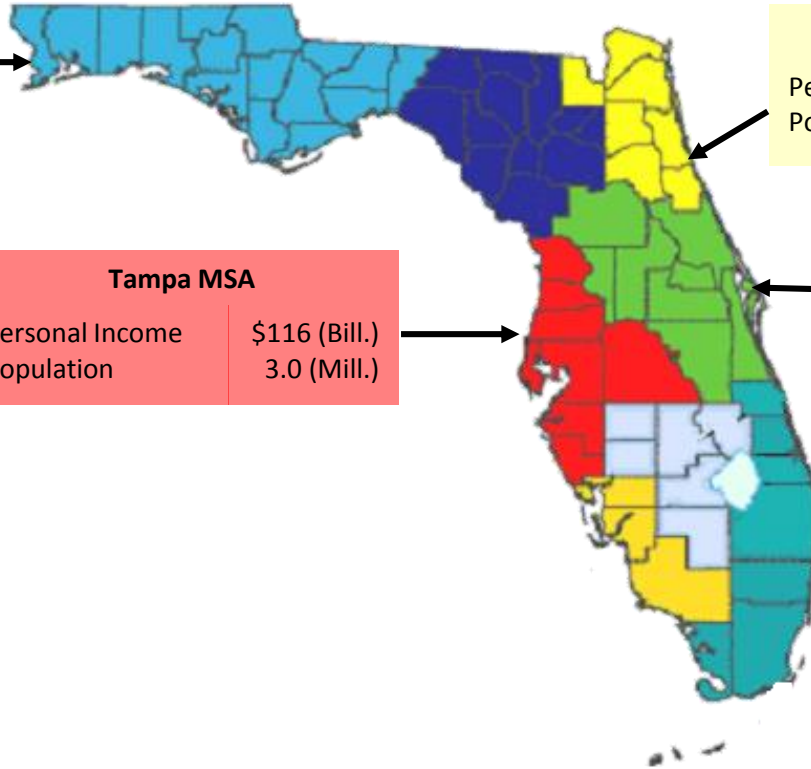


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The Large Economic Landscape of Florida for Business Development

Florida:	
GDP	\$800 (Billion)
Population	20 (Million)

Pensacola MSA	
Personal Income	\$18 (Bill.)
Population	474 (Ths.)



Jacksonville MSA	
Personal Income	\$60 (Bill.)
Population	1.4 (Mill.)




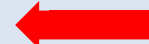
Orlando MSA	
Personal Income	\$84 (Bill.)
Population	2.3 (Mill.)

Tampa MSA	
Personal Income	\$116 (Bill.)
Population	3.0 (Mill.)

South Florida MSA	
Personal Income	\$264 (Bill.)
Population	6.0 (Mill.)

Sources: US Census and Bureau of Economic Analysis.

Florida's Diverse and Growing Industries Offer Business Opportunities for Foreign Companies

Category	March 2014 Employment	March 2015 Employment	Change	% Change	Faster Than Average
<i>Total Payroll Employment, of which:</i>	7,738,800	8,022,900	+284,100	4.0%	
Professional and Business Services	1,145,400	1,195,000	+49,600	4.3%	
Education and Health Services	1,144,600	1,192,200	+47,600	4.2%	
Leisure and Hospitality	1,070,500	1,125,300	+54,800	5.1%	
Retail Trade	1,031,700	1,068,600	+36,900	3.6%	
Financial Activities	517,700	532,400	+14,700	3.0%	
Construction	387,000	424,400	+37,400	10.0%	
Wholesale Trade	324,600	335,000	+10,400	3.2%	
Manufacturing	328,500	333,200	+4,700	1.4%	

Source: Florida Department of Economic Opportunities, Current Employment Statistics, March 2015 Employment Report.

Market Opportunities for Florida-Based Businesses are Significant in Economies with TPAs with the US

FTA Agreements	Population ¹ (Million)	GDP ² (\$ Billion)	Trade w/Florida ³ (\$ Billion)
NAFTA (excluding U.S.)	155	\$2,555	\$6
Chile	18	\$253	\$7
DR-CAFTA	52	\$197	\$22
Peru	31	\$175	\$4
Colombia	50	\$333	\$10
Panama	4	\$38	\$2
Total	310	\$3,551	\$51

Current and Potential
Pacific Alliance Members

1/2014 data.

2/GDP based on 2013 data and at Constant Prices 2010.

3/2014 Trade data.

Sources: United Nations ECLAC, *Economic Statistics*, and Enterprise Florida, Inc.

Megatrends Impacting the Americas Marketplace for Florida-Based Businesses



Positioning your company's products and services within the above trends will determine the success of your Florida-based businesses

Conclusions

- ❖ Florida offers targeted business opportunities for foreign companies establishing a corporate base in the state
- ❖ Emphasis on knowledge-intensive products, hospitality-related services and in meeting demand for a growing Florida population
- ❖ Integration of production function suggests potential business profitability can be found along supply chain across borders of North/South America, the Caribbean and the rest of the global economy
- ❖ Emerging markets have grown in size, in the sophistication of production across products and services, and in improving creditworthiness: positive for long-term business development with a corporate Florida base
- ❖ Pacific Alliance and the TPP are expected to increase business opportunities for Florida-based companies



THANK YOU!



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