

Metro St. Louis
EXPORT PLAN



GLOBAL CITIES INITIATIVE
A Joint Project of Brookings and JPMorgan Chase



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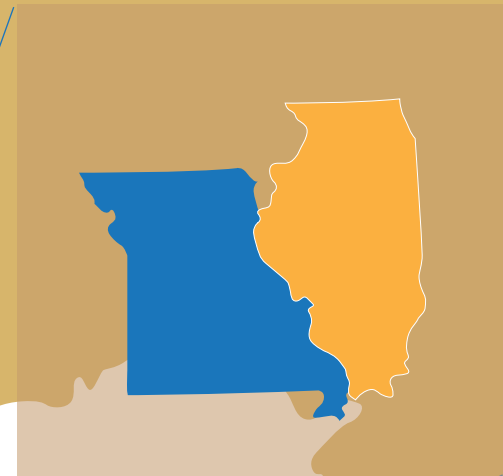
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Introduction

The St. Louis region, made up of Missouri and Illinois counties, is one of the nation's 20 largest metros with a rich history steeped in trade, immigration, and innovation. Early French pioneers established a trading post here as part of the profitable fur trade. In 1850, nearly half of all St. Louisans were born in either Ireland or Germany, which later led to the development of a thriving brewing industry and innovations such as refrigerated railroad cars and pasteurized bottled beer. Other influential groups that have contributed to the region's development include Italians, African-Americans, Latin Americans, Asians, and Bosnians. Looking ahead, regional economic planners are taking action to ensure St. Louis continues its history of trade development, immigration attraction, and innovation advancement. Some of these metro initiatives include:

- Accelerate St. Louis – a virtual support organization that gathers all of the region's entrepreneurship interests into a single online presence. The region is home to many startup support organizations such as Cortex, T-REX, the Helix Center, STLventureWorks, and the Cambridge Innovation Center, to name a few;
- BioSTL – a non-profit civic organization and coalition of university, business, and philanthropic leaders that is building an entrepreneurial culture and an innovation ecosystem that leverages St. Louis' strengths, especially in medical and plant biosciences;
- Foreign-Trade Zone management – a duty delaying or reducing process with Foreign-Trade Zone #31 serving the region's Illinois companies and Foreign-Trade Zone #102 catering to Missouri companies;
- Regional Advanced Manufacturing Partnership – an initiative to ensure the region's advanced manufacturers, both large and small, find and secure future business opportunities involving cutting edge technologies;
- St. Louis Regional Freightway – an organization to improve coordination among the region's freight assets and to promote their collective full range of capabilities;
- St. Louis Mosaic Project – a campaign to improve the region's diversity focused on attracting, welcoming, and retaining top foreign talent.

Many of these initiatives involve significant international concerns. When coupled with the reality that the region's top 25 international companies generate international sales well into the billions, it is clear regional officials must be proactive towards international trade and export expansion as an essential part of local economic development.

Continue

Overall, St. Louis has much to be proud of economically. The region's economic output as measured by gross metropolitan product is estimated to be \$150 billion. Major metro industries are healthcare, government, leisure and hospitality, retail trade, and manufacturing. St. Louis' centralized location offers efficient access to many parts of the continental U.S. with extensive freight assets integrating train, truck, plane, and barge modes of transportation. The region has a substantial number of company headquarters, many of which are listed on various stock exchanges with capitalizations well into the billions. Large manufacturers such as Boeing and General Motors have made recent and sizable local investments. Boeing's facilities will building major components of the wing and tail for the 777 airliner. General Motors is spending hundreds of millions of dollars of additional investment in its 3.7 million square foot St. Charles manufacturing facility.

Given these positives, St. Louis has had major economic setbacks and faces current commercial challenges. In particular, the closure of both Ford and Chrysler automotive plants impacted tens of thousands of workers, and reductions in defense spending currently threaten tens of thousands more.

With two of the region's major industrial sectors dealing with substantial economic disruption, plans that propose ways to adapt to and overcome these challenges must be inclusive of all commercial prospects. International trade via a regionally agreed upon metropolitan export plan is a fresh way to fortify and diversify the region's industrial sectors and future business vitality.



	Real Exports [BN]	Exports of GDP [PCT]
2014	16.1 Ranked :22	11.5% Ranked :31
2003	12.3 Ranked :17	8.4% Ranked :36



\$150 Billion

St. Louis Region's Gross Metropolitan Product

Direct Export Support Jobs

44,030

Ranked :31

Total Export Support Jobs

94,900

Ranked :21

38,400

Ranked :19

83,010

Ranked :19

"Global business is a key part of our customer-centric growth strategy. It's important not only for the long-term sustainability of World Wide Technology, but also because of its positive impact to the region as it relates to innovation, workforce development and economic development."

Tom Strunk,
World Wide Technology Chief Financial Officer

Regional Benefits of Exporting & International Connectivity

Debates about how to stimulate the economy often center on the policies of federal or state governments. However, metropolitan communities have also a critical role in this effort, particularly regarding international interests. Unfortunately, many U.S. metros are fragmented in their handling of international economic development, which leads to reactive and under-resourced trade expansion behaviors. Yet, this economic development impediment is also an export growth opportunity. Regional officials who ask about the export interests of their constituent businesses and respond to them in an organized, process-oriented approach efficiently enable their communities to meet the increasing demands for goods and services emerging from foreign markets. Further, from a bi-state resource perspective, Missouri and Illinois State trade offices provide valuable in-country support, including export counseling, agent-distributor searches, trade show planning, and more.

\$1 bn In Exports = 5,769 Jobs



Trade Supports Job Creation and Company Sales

“The ability of the University of Missouri-St. Louis to attract international students to study at our university will be significantly enhanced as they recognize St. Louis to be a more global city.”

Joel Glassman PhD
Associate Provost for Academic Affairs Director, International Studies & Programs University of Missouri-St. Louis

- Approximately every \$1 billion in exports supports 5,796 jobs.
- U.S. businesses exporting services are estimated to have 70 percent higher employment and 20 percent higher wages than non-exporters.
- Research by the U.S. International Trade Commission of small-to-medium firms that both manufacture and export reveal an average revenue growth of 37 percent from 2005-09, compared to a decline of 7 percent for non-exporting companies.
- Looking only at middle market firms, a 2014 National Center for the Middle Market survey found that more than 76 percent of exporting companies report revenue increases from the previous year, compared to 64 percent of non-exporting middle market companies. The proportion of middle market firms adding employees in the previous year was also much higher among those generating international revenue with 51 percent for exporters versus 39 percent for purely domestic companies.
- New companies backed by venture capital and seeking to export often have the benefit of the venture capital’s knowledge and networks, which expedites entry into new markets.

Foreign Markets Offer Growth Potential

- Nationally, company relocations from out-of-state have contributed only 1.9 percent towards job creation; whereas new business openings and expansions nationally have accounted for 56.3 percent and 41.8 percent respectively.
- 86 percent of global economic growth between 2015 and 2020 will occur outside of the U.S.
- By 2030, Asia Pacific will account for 66 percent of the global middle class, whereas Europe will make up 14 percent and North America 7 percent. By comparison, in 2000, North America, Europe, and Japan represented 75 percent of global middle class consumption.
- Exporting is concentrated in a small number of large firms – only 4 percent of U.S. firms export, and the top 10 percent of exporting firms account for approximately 96 percent of U.S. exports.
- 60 percent of U.S. middle market firms do not export at all and only about 10 percent of the U.S. middle market's revenue is derived from international sources.

Role of Immigrants in Business Development

- In the U.S., immigrants founded more than half of startup companies valued at \$1 billion or more and are key members of management or product development teams in 70 percent of these startups.
- Nearly one-quarter of the U.S. startup companies valued at \$1 billion or more have a founder who first came to the U.S. as an international student.
- St. Louis has a relatively small share of foreign born population at 5 percent relative to U.S. average of 14 percent.
- St. Louis immigrants are 60 percent more likely to start a business and 130 percent more likely to have an advanced degree.
- Compared to other U.S. metros, a St. Louis regional effort to attract more immigrants would directly boost the startup community.
- Several large St. Louis area companies have foreign ownership or are managed by foreign born individuals such as Nestlé Purina, Bunge NA, Anheuser-Busch InBev, Monsanto, GKN Aerospace, NOVUS, MilliporeSigma, SunEdison, Zoltek, Hussmann, and Amdocs.

In light of the opportunities offered by trade and immigration, a regional steering committee performed a comprehensive analysis of our export economy with the intent to develop recommendations on how to further strengthen our overall economy.

2030 Global Middle Class

- 66% ASIA PACIFIC
- 14% EUROPE
- 7% NORTH AMERICA
- 3% NOT INDICATED



>50%
Of Startups Valued At \$1bn By Immigrants

70% Key members of product team

60%
Of U.S. Firms Mid Market Do not export

10% of revenue derived from international sources

25%
Of Startups Valued at \$1bn

Founders first came to the U.S. as an international student

86%
Global Economic Growth

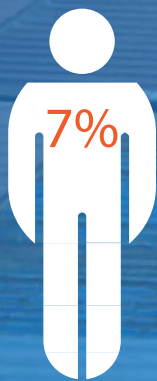
Growth between 2015 and 2020 will occur outside of the U.S.



(By comparison, in 2000, North America, Europe, and Japan represented 75% of global middle class consumption)



\$16.1 bn Regional Exports Goods and Services



94,900

Regional Jobs supported

Of the region's workforce

22nd

Ranked out of the 100
largest metros

World Trade Center St. Louis and Washington University conducted a regional market assessment to uncover facts and generate insights about metro St. Louis' export activities. This assessment included an in-depth examination of metro export statistics, an online benchmarking survey of businesses both exporting and not exporting, and personal one-on-one interviews with many company executives. The following is a summary of our region's engagement with international markets, as well as key findings.

Metro Export Statistics

According to the Brookings Institution's 2015 Export Monitor, the region exports goods and services estimated at \$16.1 billion, supporting an estimated total of 94,900 direct and indirect jobs. By comparison to other metros, the St. Louis area is 22nd by value of exports. Nearly 22 percent of its export value,

or about \$3.6 billion, consists of automotive and aeronautical transportation equipment. St. Louis' export intensity is 11.5 percent, ranking the region 31st nationally. Regional export growth was 1.1 percent between 2008 and 2014, ranking 73rd among other metros. Near metros with greater export growth include Louisville (4.9 percent), Nashville (4.3 percent), Omaha (3.8 percent), Kansas City (2.3 percent), Oklahoma City (2.1 percent), and Chicago (2.1 percent). Below are estimates of exports by county:

St. Louis Exports

22% = \$3.6 bn

Automotive & Aeronautical
Transportation Equipment

11.5%

Gross Metropolitan
Product

31st

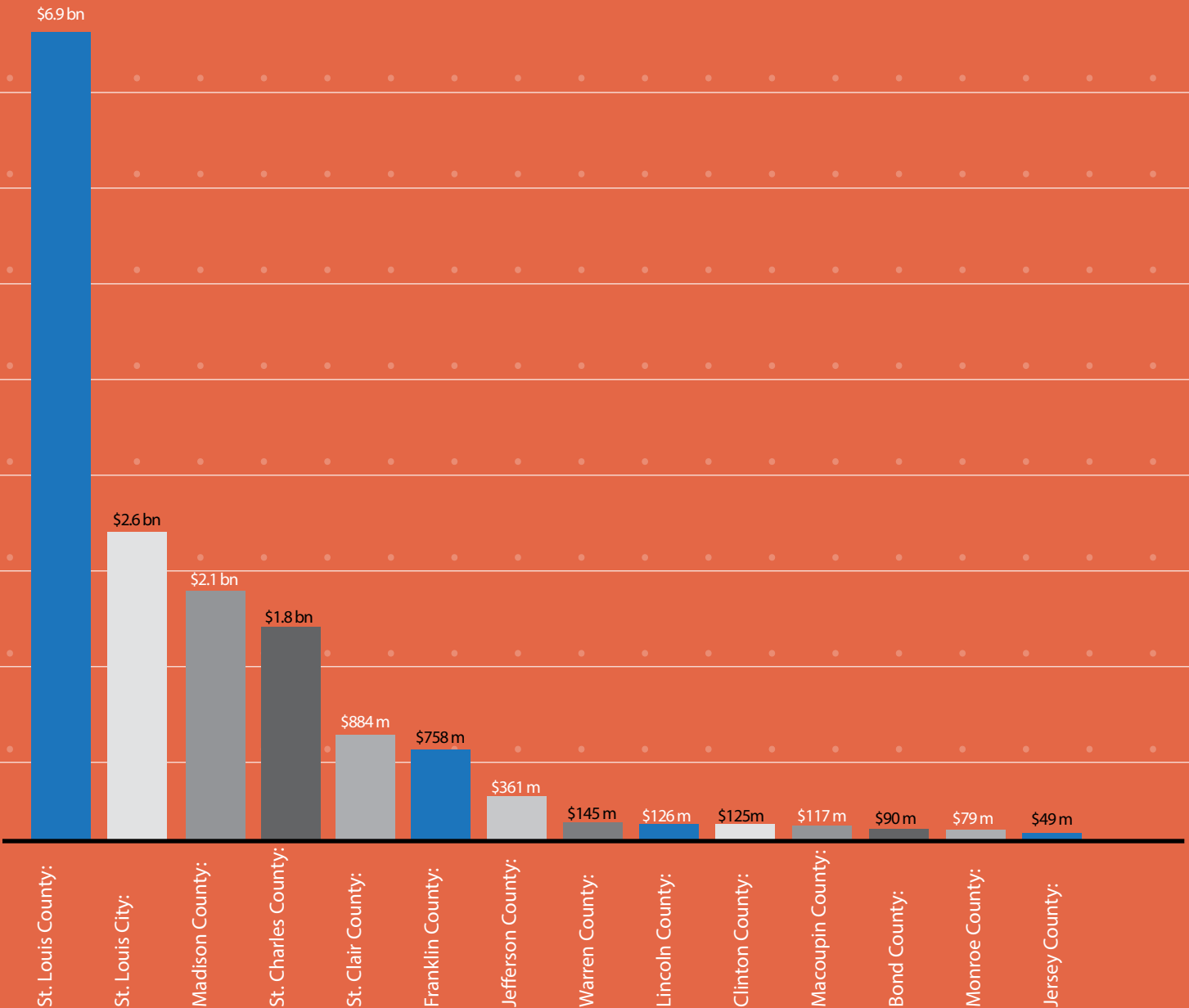
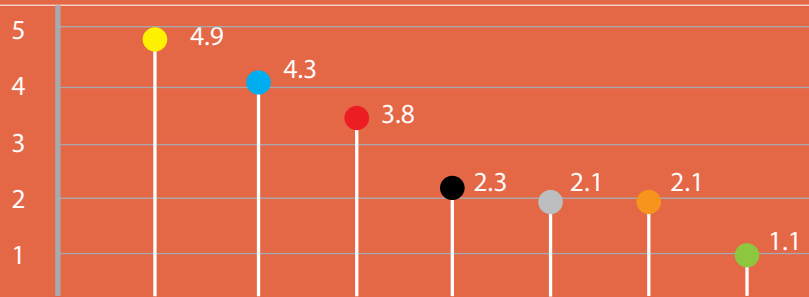
Ranked Nationally

1.1% Growth

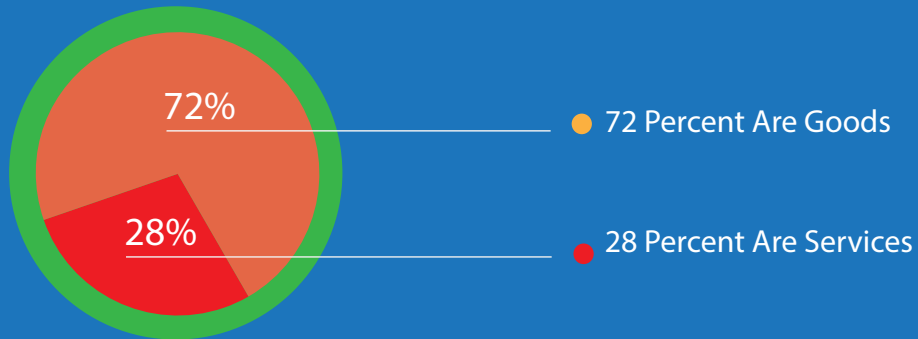
Ranked 73rd 2008 – 2014

Regional Growth

- Louisville
- Omaha
- Oklahoma City
- St. Louis
- Nashville
- Kansas City
- Chicago



Metro Region Exports \$16.1 billion



Of the metro region's \$16.1 billion in exports, it is estimated 72 percent are goods and 28 percent are services. The top industries by export value are aircraft products (\$1.9 billion), motor vehicles (\$1.7 billion), petroleum and coal (\$710 million), chemicals (\$702 million), nonferrous metal products (\$525 million), and pharmaceuticals (\$470 million). Top industries by total export supported jobs are aircraft products (10,520), motor vehicles (7,600), food and drink services (4,300), freight and port services (2,949), and credit issuance and lending (2,900).

Export growth for the region's goods is mixed. From 2003 to 2014, transportation equipment (the region's heaviest export sector) had a 21 percent increase and machinery manufacturing experienced a 36 percent increase. Export growth for services during that period has been exceptional, spearheaded by financial services (287 percent), technology (146 percent), management and legal (104 percent), information technology royalties (64 percent), and travel and tourism (22 percent). Travel and tourism management and information technology royalties are St. Louis' main export services each at roughly \$1 billion annually.

The International Trade Administration estimates St. Louis' top foreign markets for goods are Canada (\$1.9 billion), Mexico (\$1.5 billion), and China (\$1.3 billion). At minimum, 2,884 St. Louis area companies export, 84 percent of which are small to medium sized businesses. Estimates for St. Louis service exports by foreign market were not obtainable.

St. Louis' Top Foreign Markets For Goods

Canada
[\$1.9 billion]

Mexico
[\$1.5 billion]

China
[\$1.3 billion]

2,884
St. Louis Companies
Exporting

TOP FIVE INDUSTRIES BY REAL EXPORTS 2014

AIRCRAFT PRODUCTS & PARTS: 1.9 billion

MOTOR VEHICLES: 1.7 billion

PETROLEUM & COAL PRODUCTS: 710m

CHEMICALS: 702m

NONFERROUS METAL PRODUCTS: 525m

PHARMACEUTICALS: 470m

TOP FIVE INDUSTRIES BY TOTAL EXPORT SUPPORTED JOBS 2014

AIRCRAFT PRODUCTS & PARTS: 10,520

MOTOR VEHICLES: 7,600

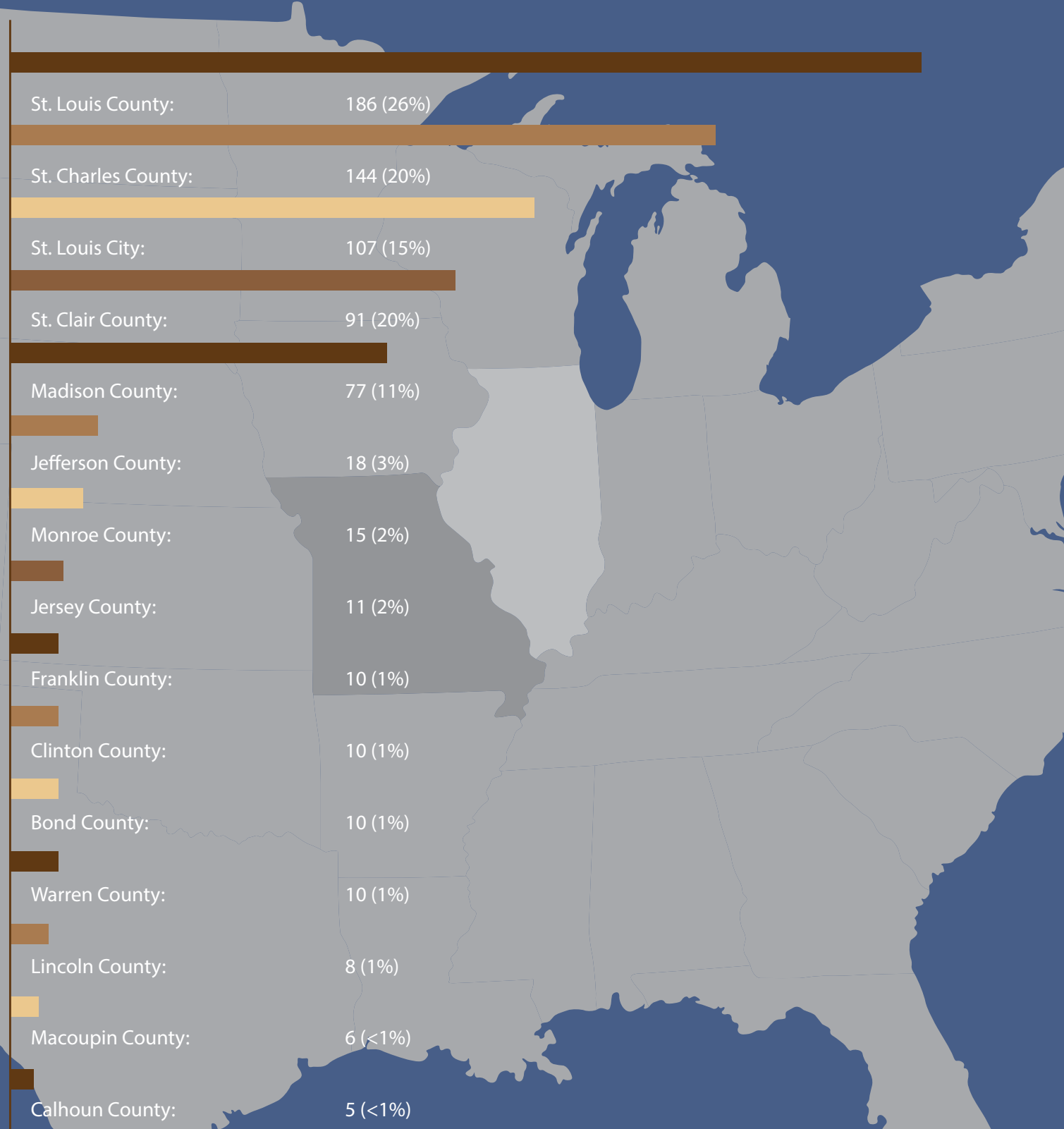
FOOD & DRINK SERVICES: 4,300

FREIGHT & PORT SERVICES: 2,940

CREDIT ISSUANCE & LENDING: 2,900


Benchmarking Survey and Interviews

World Trade Center St. Louis and Washington University researchers used both an online survey and interviews to collect quantitative and qualitative primary research data on the attitudes and thoughts of metro St. Louis companies of all types toward exporting. Over 700 companies responded to the online survey and 44 firms were interviewed. By geographical distribution, survey respondents came from all counties in the metro area:



Nearly 170 businesses self-identified as exporters with 60 percent selling goods only, 28 percent selling services only, and 12 percent selling both. 50 percent of exporters reported earning up to 10 percent of total sales from foreign markets. A quarter of exporters earned between 10 to 25 percent from foreign sales, and another quarter earned greater than 25 percent from sales. Encouragingly, companies earning more than 10 percent of sales from exports seek additional export markets with 68 percent planning to expand exports within four years.

About 60 percent of survey respondents, about 315, indicated they do not export. Many reasons were shared as to why exporting was not part of their business operations. About 67 percent simply indicated their product or service was not exportable, 11 percent indicated they had sufficient business from domestic customers, and 10 percent sought to expand domestically first. World Trade Center St. Louis and Washington University researchers reviewed the companies indicating that export operations could not be possible, and determined about half had export potential. Over 44 companies were interviewed and asked questions about their export operations and interests. By size, these companies consisted of eight large business, 22 small-to-medium sized firms, and 14 startups. By sector, these firms comprised 16 manufacturers, 16 service providers, and 12 that were in technology-based services with some manufacturing.



“ Increased exports will be a key driver of our region’s future success and St. Louis entrepreneurs and small to mid-size businesses are more ready to seize the opportunity to play on the global stage than people think.”

Tom Hillman
FTL Capital Partners / Lewis & Clark Ventures



Key Findings – Impediments & Assets

\$3.6 bn = 22%

Automotive & Aeronautical
Transportation Equipment
Total Exports

-12% Decline

Aircraft Product

2005 – 2007

36% Increase

Aircraft Product

2009 – 2013

-49% Decline

Vehicle Production

2007 – 2009 45% Decline

Occurred in 2009

117% Increase

Vehicle Production

2009 – 2013

1 Aircraft products and motor vehicles have a substantial economic role in metro St. Louis' export economy. Altogether these two sectors account for \$3.6 billion or 22 percent of total exports.

- Aircraft product export performance during the last ten years generally has been mixed but stable with a decline of 12 percent from 2005-07, followed by an increase of 36 percent from 2009-13.
- Vehicle production was less stable with a reduction in exports by 49 percent from 2007-2009, 45 percent decline alone in 2009, then an increase of 117 percent from 2009-2013.

2 Many small-to-medium sized companies do not recognize their export opportunities or are not convinced of their profitability.

- Metro St. Louis companies generally choose to be reactive when presented with an export opportunity.
- 67 percent of companies believed their products could not be exported, and 23 percent simply chose not to export.
- 58 percent of expanding exporters said they were found by their foreign customers.

3 Exporters indicated foreign networks and relationships were key factors in accessing and cultivating foreign customers.

- 52 percent of expanding exporters reported some form of prior relationship in a foreign market.
- Non-exporters said their priority was establishing trust with potential foreign partners, whereas expanding exporters indicated the need to prioritize the management of trust with foreign buyers.
- Service companies reported feeling significant pressure to follow clients into foreign markets.

4 Exporters, regardless of age or size have operational issues they do not know how to manage, including matters such as export compliance and effective market engagement methods.

- Firms whose export sales were less than 10 percent of total sales said understanding the export process from the U.S. was challenging.
- Firms whose export sales were greater than 10 percent of total sales said understanding processes in foreign markets was challenging.
- 57 percent of companies would like help with training, trade shows, and regulations.





58% of firms sought after by foreign customers

57% of firms desire help with training, trade shows, and regulations

\$1.3 bn

Illinois

\$509 m

Missouri

Economic impact of international students

St. Louis hosts 9,000 international students over a four year period

5

Metro St. Louis has many internationally engaged assets that currently operate in limited connectivity with other adjacent regional interests, and could facilitate trade opportunities.

- Significant freight infrastructure has been operating without a regional advocate organization. These assets include six Class I railroads and the third largest rail hub in the U.S., four interstates with low congestion, the third largest inland and ice free port, five airports, and several pipelines.
- Universities with global connections host 9,000 international students over a four year window, maintaining 232 global partnerships, and generating an estimated international student economic impact of \$1.3 billion in Illinois and \$509 million in Missouri.
- Several multinationals have their headquarters in the region and approximately 350 foreign based companies operate in metro St. Louis.
- The St. Louis Mosaic Project, a nationally recognized initiative to attract and welcome the foreign born, has more than 500 business and volunteers actively working to ensure foreign talent finds reason to call metro St. Louis home.

Goal:

A healthy diversified economic base and global business performance recognized for its growth, value, and diversification delivered to our partners and our people.

Objectives:

- To serve — Elevate the export support ecosystem from its high intrinsic potential to a high performance network. Use innovative approaches to develop the 'go-to' export service network for any export solution by the end of 2017.
- To synergize — Maximize regional synergies between and among companies and other parties to facilitate export market entry and growth. Increase the number of exporting companies by 20 percent by the end of 2020.
- To stimulate — Communicate the compelling export story across the region driving businesses to the export support ecosystem and to the opportunities to synergize. Redirect the trade curve for export growth to achieve national top 10 status of export intensity by the end of 2020.

There are four strategies designed to achieve objectives. Each strategy has several operational tactics. Tactics have been designed to address the identified impediments and be implemented in phases to build on the foundation of each earlier phase.

Strategy One: Organize Regional Export Facilitation Ecosystem for Higher Performance

Local, state, and federal service organizations across the region will configure an innovative and integrated export ecosystem that becomes the 'go-to' structure for any exporter looking for assistance. The ecosystem will encompass the international know-how and networks available in the region. This new formation will use two tactics:

Forming a St. Louis Trade Commission — The St. Louis Trade Commission is comprised of all federal, state, and regional trade service organizations across the region. Each organization has unique expertise and reach into global markets. Harmonized services will more effectively guide the region's businesses to prepare for global commerce, respond to global customers, and pursue strategic opportunities. Anticipated efficiencies created by the St. Louis Trade Commission will include:

- **Intergovernmental Collaboration** — to promote its collective service offerings to businesses and to identify specific competencies each commission member can uniquely offer to regional companies. In addition, the commission members will provide referrals according to their agreed upon internal strengths.
- **Innovative Access** — to develop new service delivery methods that meet the needs of the regional exporter community. New methods include an online help network and on-location office hours in the incubators. Interviews with regional startup businesses indicate an interest in enhanced peer-to-peer exchanges with a focus on exporting.
- **Guidance and Data** — to provide the regional exporting community with global market information, track and report progress on regional export performance, and report on global market developments offering regional firms export opportunities. Information will be distributed within the bi-state area.
- **Success Stories Sharing** — to spotlight export successes and encourage other potential area companies to seek assistance. Additionally, these success examples are needed by each commission member to demonstrate value to their financial stakeholders.

Creating a Global Forum — The Global Forum will be an open and informal network of regional public and private organizations interested in developing global trade, and will operate as a critical support community around the St. Louis Trade Commission. The purpose of the Global Forum will be to communally receive input, collectively oversee, and cooperatively refine regional export priorities. Another critical function is to network and connect businesses with regional non-governmental export resources. Enhanced capabilities created by the Global Forum will include:

- **Increased Awareness of Regional Professional Competencies** — offered by specialized regional organizations. Professional corporations such as banks, law firms, accounting firms, and freight forwarders, provide locally available in-depth trade expertise. Industry associations provide connectivity deep into sectors of the regional business community. Ethnic associations such as the Hispanic Chamber and the Asian Chamber work to build commercial/cultural bridges. The Global Forum also will be intentional to include the St. Louis Promise Zone and its efforts to address severe poverty and unemployment.

- **Ready Access to Native and Foreign STEM Talent** — Universities have global resources and are eager to be supportive of business both outbound from St. Louis and inbound to St. Louis. A large pool of knowledgeable international students, including post-doctoral students, and professors and administrators are concentrated in area schools. Further, most global markets already include preexisting relationships with metro St. Louis universities and successful alumni, which can facilitate foreign business networking. Outreach should commence with metro St. Louis schools with a substantial number of international students such as Washington University, Lindenwood University, Saint Louis University, University of Missouri-St. Louis, Webster University, and Southern Illinois University Edwardsville. Organizing native STEM talent also should be included in this activity.
- **Priority Market Engagement** — on which to focus regional resources. Multiple markets are likely to be selected to provide opportunities for multiple industry clusters. Regional research indicates that an initial market focus for consideration is Canada and a priority industry cluster of focus is equipment manufacturing. In addition, the St. Louis Trade Commission will seek opportunities for regional companies to participate in cutting areas of advanced manufacturing and infrastructure development.

Promise Zones are high poverty communities where the federal government partners with local leaders to increase economic activity, improve educational opportunities, leverage private investment, reduce violent crime, enhance public health, and increase workforce readiness. In the St. Louis Promise Zone:

- 200k residents
- 36% live in poverty
- 33% earn less than \$12k/month
- 19% of age 25+ have no diploma
- 23% are unemployed
- 61% are rent burdened

Success stories in the St. Louis Promise Zone involve:

- BioSTL
- Women's Business Center Program
- Program for Investment in Micro Entrepreneurs
- Start Up in a Day Initiative "Start Small"

- Trade Mission Planning and Hosting — to organize regional industry leaders for familiarity visits with priority foreign markets and to meet with prospective customers. These visits will occur both inbound and outbound. Through increased public and private collaboration, the region can leverage limited resources, providing a more coordinated, cost-effective approach towards serving the global interests of the metro business community while connecting the citizens and leaders of the region to the world.

Strategy Two: Innovate Delivery of Regional Export Services

Regional export service providers will cooperatively and efficiently serve regional economic assets such as globally minded startups, internationally apprehensive SME's, and world-class freight providers. In addition to increased efficiencies through cooperation, export service providers will innovate their customer service delivery via the following tactics:



Creating an Export Challenge Business Plan Competition — The St. Louis Economic Development Partnership, in collaboration with the St. Louis Regional Chamber, hosts an annual startup business plan competition called the Accelerate St. Louis Challenge. The competition is open to the St. Louis bi-state region, with over 140 startup companies submitting business plans in 2015. The Accelerate St. Louis Challenge has seven categories: (1) bio/life science, (2) education, (3) financial technology, (4) tech, (5) manufacturing, (6) products/services, and (7) food. In 2016, the Accelerate St. Louis Challenge will add an export category to recognize and support companies, both startup and SME, with exceptional international business strategies.

Accelerating the Accelerators — From St. Charles County to St. Clair County, the region has a robust ecosystem of business accelerators and incubators designed to support the successful founding of entrepreneurial enterprises. These accelerators and incubators provide the knowledge-rich and relationship-rich environment needed for young enterprises to prosper. Using the Accelerate St. Louis Challenge as a launch pad, the St. Louis Trade Commission will be more intentional about engaging the regional startup community.

Promoting St. Louis as an International Advanced Manufacturing Hub — A substantial amount of regional employment is in industries that involve manufacturing. These supplier SME's have the capacity to export but are resource constrained and would realize trade opportunities more rapidly if their collective interests were also organized. The St. Louis Regional Advanced Manufacturing Partnership (RAMP) will work to find ways on how advanced manufacturers can access international markets. These suggestions will generally include:

- Trade conferences, particularly those organized by the U.S. Commercial Service
- State and federal market opening efforts in priority markets
- In-bound and out-bound trade missions
- Distribution and logistics sharing

Organizing the Region's Supply Chain Infrastructure for Global Connectivity — St. Louis has substantial freight assets and sophisticated logistics know-how. The formation of the St. Louis Regional Freightway will enhance these assets and work towards ways local goods can be efficiently delivered to foreign markets. Regional freight development efforts with significant international concerns include initiatives involving the unused capacity of both Lambert-St. Louis International Airport's Northern Tract and MidAmerica St. Louis Airport's distribution center, which have been exploring cold chain distribution, live animal export, and dual customs (with Mexico) capabilities. The St. Louis Trade Commission will support the St. Louis Regional Freightway with freight initiatives involving international connectivity.

Strategy Three: Facilitate International Collaboration among Regional Companies

Metro collaboration among companies and supply chain services will enhance regional competitive advantages and trade that would have otherwise been missed. Each exporter, and potential exporter, has capabilities and challenges towards entering and competing in a foreign market. Three tactics will encourage regional collaboration to globally compete:

Developing a Structured Matchmaking Program — Export Match will be a new matchmaking service that enables St. Louis area companies to identify other regional companies with interest in similar foreign markets. Efficiencies yielded by this initiative will lead to shorter time to market, more effective problem solving through people-to-people connections, and the ready application of innovative solutions through an augmented network of community experiences. Company interactions will occur both in-person and online, and be supplemented by trade and freight experts. Benefits to metro companies include:

- Shared transportation, warehousing, and distribution
- Sales through indirect exporting
- Complementary product lines for exporting

Export Match will provide hosted matchmaking events focused on countries and industries and will work in close partnership with the St. Louis Regional Freightway. St. Louis companies in the service sector such as architecture, engineering, law, and banking, often

enter foreign markets at the invitation of their U.S. manufacturer clients. Export Match also will host programming relevant to service sector interests.

Connecting through Person-to-Person Encounters — Trade Café will be a new venue seeking to mimic the momentum in the region's innovation corridor of the highly successful Venture Café. The objective is to provide a casual, periodic time and place for trade-innovation and trade partner exploration. Trade Café will be a less-structured sibling to Export Match.

Initiating a Regional Campaign to Advocate the Benefits of Trade – Promote a sense of globalism among St. Louis area small-to-medium sized companies, particularly companies considered medium sized as they are likely to be near-ready to support foreign buyer relationships.



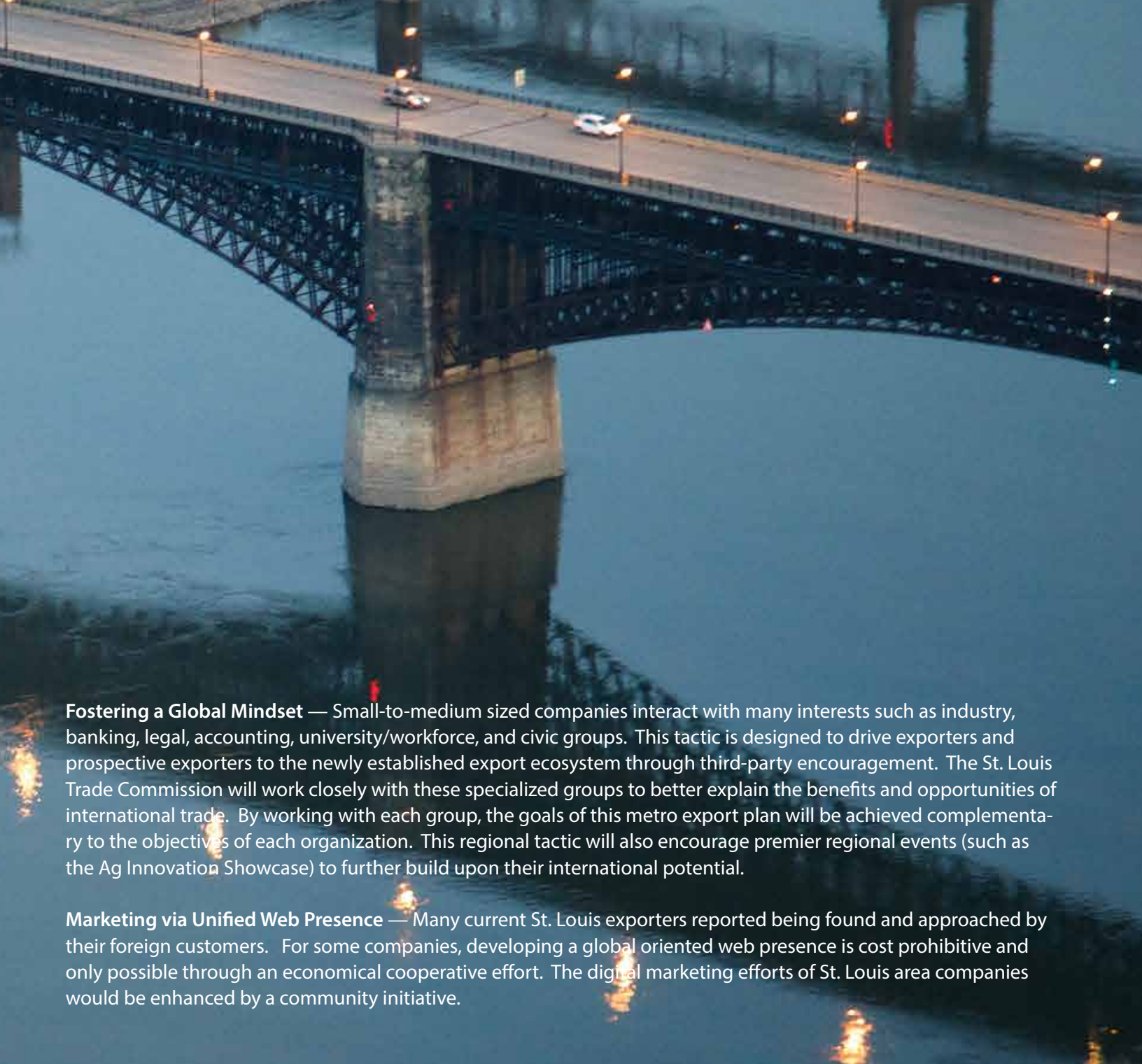
Strategy Four: Communicate the St. Louis Area is Ready for Globalization

As previously indicated, research shows when companies are confident in their export competency they will expand into additional countries and industries. The purpose of this strategy is to reduce the awareness barriers both in the region and globally about St. Louis' export offerings, and to stimulate a push/pull global demand for metro St. Louis products. A communication strategy will consist of the following tactics:

A Metro St. Louis Brand for Global Audiences — The St. Louis Trade Commission and the Global Forum will support the global branding effort developed by the St. Louis Convention and Visitors Commission (CVC) to promote the region's assets using paid and earned media. This branding will be 'St. Lou is Global', which operates under the regional family branding managed by the CVC. The people of St. Louis have much to take pride in and speak about when discussing the regional economy. A globally oriented branding image will multiply the stature of these industry clusters as both regional hubs of competency and global centers of excellence.



Seeking Export Help — Small-to-medium sized companies anxious about exporting require encouragement to seek assistance and knowledge of the resources available to them. The St. Louis Trade Commission will campaign to promote export success stories to their respective constituencies, particularly those that are not exporting or are under-exporting. St. Louis Trade Commission members will also highlight the regional export ecosystem as a ready network available for any export questions or concerns. This campaign will promote the 'St. Lou is Global' brand and all regional export support service providers by providing companies the opportunity to sample services. These services will include online courses and webinars and problem solving workshops with experienced export experts.



Fostering a Global Mindset — Small-to-medium sized companies interact with many interests such as industry, banking, legal, accounting, university/workforce, and civic groups. This tactic is designed to drive exporters and prospective exporters to the newly established export ecosystem through third-party encouragement. The St. Louis Trade Commission will work closely with these specialized groups to better explain the benefits and opportunities of international trade. By working with each group, the goals of this metro export plan will be achieved complementary to the objectives of each organization. This regional tactic will also encourage premier regional events (such as the Ag Innovation Showcase) to further build upon their international potential.

Marketing via Unified Web Presence — Many current St. Louis exporters reported being found and approached by their foreign customers. For some companies, developing a global oriented web presence is cost prohibitive and only possible through an economical cooperative effort. The digital marketing efforts of St. Louis area companies would be enhanced by a community initiative.

By 2020

Export Intensity
National Rank

Top 10

By 2020

Increase The Number of
Exporting Companies By

20%



Regional Goals	KPI (D=Highlevel Dashboard)	Key Organizations
<p>Strategy 1: Organize</p> <p>St. Louis Trade Commission</p> <p>Global Forum</p>	<p>Export Supported Jobs (D) Export Value (D) Export Growth (D) Export Intensity (D)</p> <p># of firms engaged in services (D) # of firms referred to partners (D)</p> <p># of firms and orgs participating # of inbound/outbound delegations # of international students (D)</p>	<p>World Trade Center St. Louis St. Louis Economic Development Partnership SW Illinois Trade & Investment Council Leadership Council Southwestern Illinois St. Louis Regional Chamber East-West Gateway Council of Governments Bi-State Development</p> <p>World Trade Center St. Louis SW Illinois Trade & Investment Council U.S. Commercial Service SBA Office of International Trade IL Dept. of Commerce & Economic Opportunity MO Dept of Economic Development IL and MO Small Business Development Centers</p> <p>Metro banking, accounting, legal, and HR groups Specialty groups (eg: BioSTL, St. Louis Makes, St. Louis Regional Freightway, St. Louis Mosaic, SW Illinois Trade & Investment Council, St. Louis City-County Promise Zone) Ethnic organizations (eg: Asian Chamber, Hispanic Chamber, Minority Business Council) Metro schools and universities, St. Louis Sister Cities</p>
<p>Strategy 2: Innovate</p> <p>Export Challenge</p>	<p># of companies participating # of companies exporting (1st time, new market, and/or new industry)</p>	<p>St. Louis Economic Development Partnership - Innovation & Entrepreneurship - RAMP/Advanced Manufacturing World Trade Center St. Louis St. Louis Regional Chamber Startup organizations (Cortex, T-Rex, CIC, etc) St. Louis Freightway SW Illinois Trade & Investment Council</p>
<p>Strategy 3: Collaborate</p> <p>Export Match Trade Café</p>	<p># of firms finding complementarity (D) # of attendees participating</p>	<p>World Trade Center St. Louis SW Illinois Trade & Investment Council U.S. Commercial Service SBA Office of International Trade IL Dept. of Commerce & Economic Opportunity MO Dept of Economic Development IL and MO Small Business Development Centers International Trade Center at SIUE Startup organizations (Cortex, T-Rex, CIC, etc)</p>



Strategy 4: Communicate

Get Started Exporting
Engage Regional Leadership
Global Web Marketing
Global Branding
Global Events
Success Stories

of IL and MO passports (D)
of regional organizations supporting (D)
of web users and visitors
of media mentions (D)
Int'l attendees at conferences
of firms sharing their story (D)

World Trade Center St. Louis
Southwestern Illinois Trade &
Investment Council
SBA Office of International Trade
St. Louis Mosaic
St. Louis Convention & Visitors Commission
Bi-State Development
St. Louis Freightway
International Trade Center at SIUE



Smart immigration reform

The region must have access to the brightest minds and world-class talent needed to develop the products and services the rest of the world demands now and in the future. Metro St. Louis is losing access to brilliant minds and potential job creators. Congress must reform and modernize the H-1B visa program that drives entrepreneurship and innovation, and create entrepreneur oriented non-immigrant visa programs based on capital investment and job creation.

Invest in and promote metro St. Louis supply chain infrastructure

The St. Louis region has exceptional supply chain infrastructure and potential. The East-West Gateway Council of Governments and both the Illinois and Missouri Departments of Transportation issued a report that explains not only the potential for bi-state freight development but also global engagement. Chapter three of the report, 'Global Context for Freight Movement', explains the global conditions of why now is the right time to invest in and promote metro St. Louis supply chain infrastructure. Where appropriate, the branding of both 'St. Lou is Global' and the St. Louis Freightway should be jointly marketed.

Explore and engage global agriculture export opportunities

Metro St. Louis' capabilities in the global delivery of professional services and manufacturing should be considerate of the impact agriculture also has in the region. Many of the largest regional companies have both deep export proficiencies and connections to agriculture. Regional officials should explore arrangements that enhance not only metro St. Louis' export connectivity but also tap into multistate agronomic strengths. Also, a comprehensive master plan for a plant science innovation district is underway funded by the Economic Development Agency under the Department of Commerce. The plan will identify infrastructure improvements, greenway connections, mixed use development and an implementation strategy for creating an innovative and vibrant work community in Creve Coeur, Missouri.

All economic development organizations should engage the St. Louis Trade Commission

The St. Louis Trade Commission would increase its efficiency and effectiveness through regular interaction with all economic development organizations. Highly localized groups have greater proximate and steady interaction with business interests in their geographies, and are excellent sources of finding potential export opportunities. All economic development organizations should coordinate with the St. Louis Trade Commission on company outreach activities.

Become a welcoming region for immigration

Immigrants are entrepreneurs often because no other choice is available and studies have found that new businesses account for the majority of net new job growth in the nation. Not only do inclusive policies drive growth among our foreign population but they can drive domestic relocations as well. According to a report by Council of the Americas, 270 US-born residents move to counties for every 1,000 immigrants that arrive. Regional officials should work together to make the St. Louis area the most welcoming in the country and explore additional ways to support organizations such as the St. Louis Mosaic Project and International Institute of St. Louis.

Attract top global talent and specialized skills that enhance the regional workforce

Job creation and economic development are linked together by an area's ability to retain, attract, and offer talented workers, and setup structures that impart their advanced skills to an eager and ready-to-learn native workforce. International students studying in metro St. Louis universities via F1 visas are one means by which hard-to-find foreign talent can be drawn to St. Louis. Science, technology, engineering, and math (STEM) students should be encouraged and supported in their applications for occupational practical training (OPT) extension visas, and then mapped to local companies offering difficult-to-fill STEM jobs. Also, innovative use of H1B visas should be explored to enable companies to expand their technological advantages.

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America's Central Port

Carol Clark
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Larry Dill
University of Missouri International Trade Center

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Cortex
Downtown St. Louis Partnership
East-West Gateway Council of Governments
Economic Development Center of St. Charles County
Emerson
Essex Industries
Federal Reserve Bank of St. Louis
FTL Capital
Greater St. Charles County Chamber of Commerce
Hispanic Chamber of Commerce of St. Louis
Illinois SBDC International Trade Center
at Southern Illinois University Edwardsville
JPMorgan Chase
Lambert-St. Louis International Airport
Leadership Council Southwestern Illinois
Madison County Community Development
MilliporeSigma
Missouri Chamber of Commerce
Missouri Department of Economic Development
Missouri Enterprise
Missouri Partnership
Peabody Energy
Regional Advanced Manufacturing Partnership
Regional Business Council
ROHO Group
Saint Louis University
Southwestern Illinois Trade & Investment Council
St. Charles City
St. Charles County
St. Louis City
St. Louis Convention & Visitors Commission

St. Louis County
St. Louis Development Corporation
St. Louis Economic Development Partnership
St. Louis Mosaic Project
St. Louis Regional Chamber of Commerce
T-REX
U.S. Commercial Service
U.S. Small Business Administration
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Washington University in St. Louis
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