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THE CENTERSTATE NEW YORK EXPORT PLAN

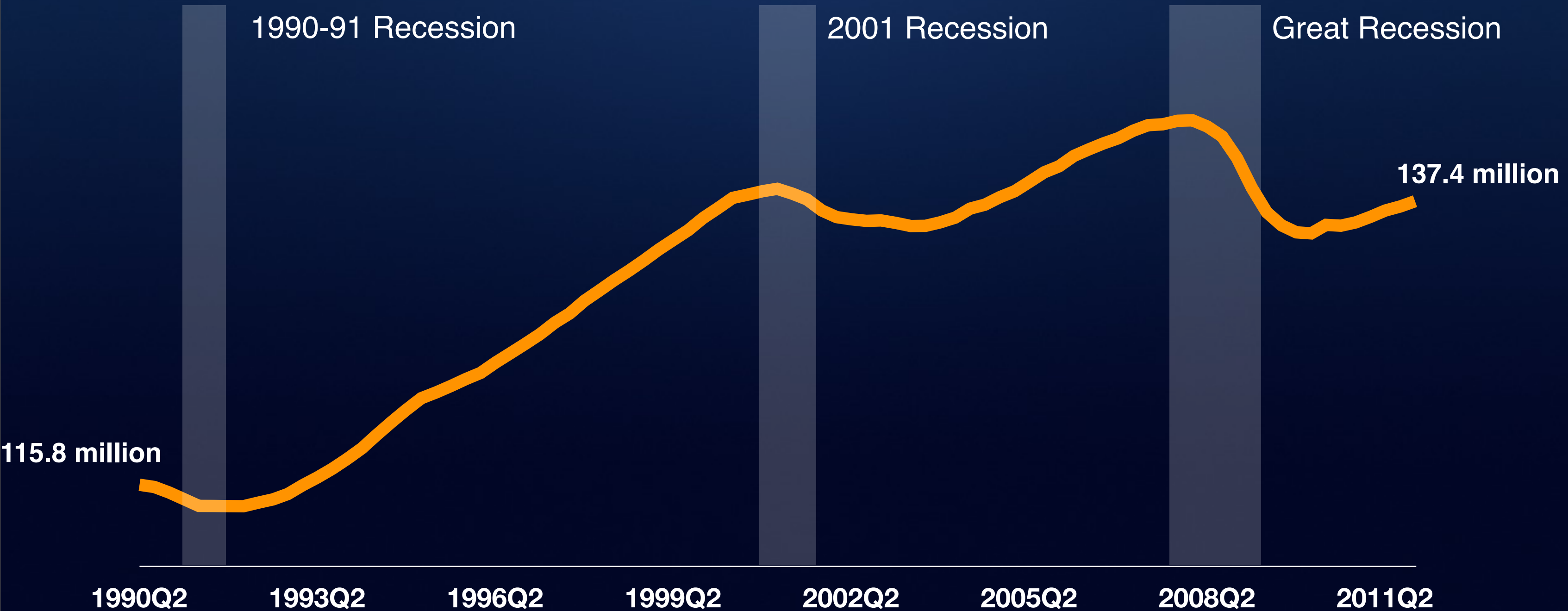
A New Strategy to Grow Jobs and the Economy

1 2 3

1 The U.S. economy is undergoing a structural change, and it requires a structural response

The Great Recession Was a Structural Recession, Not a Cyclical One

Number of People Employed in the U.S.



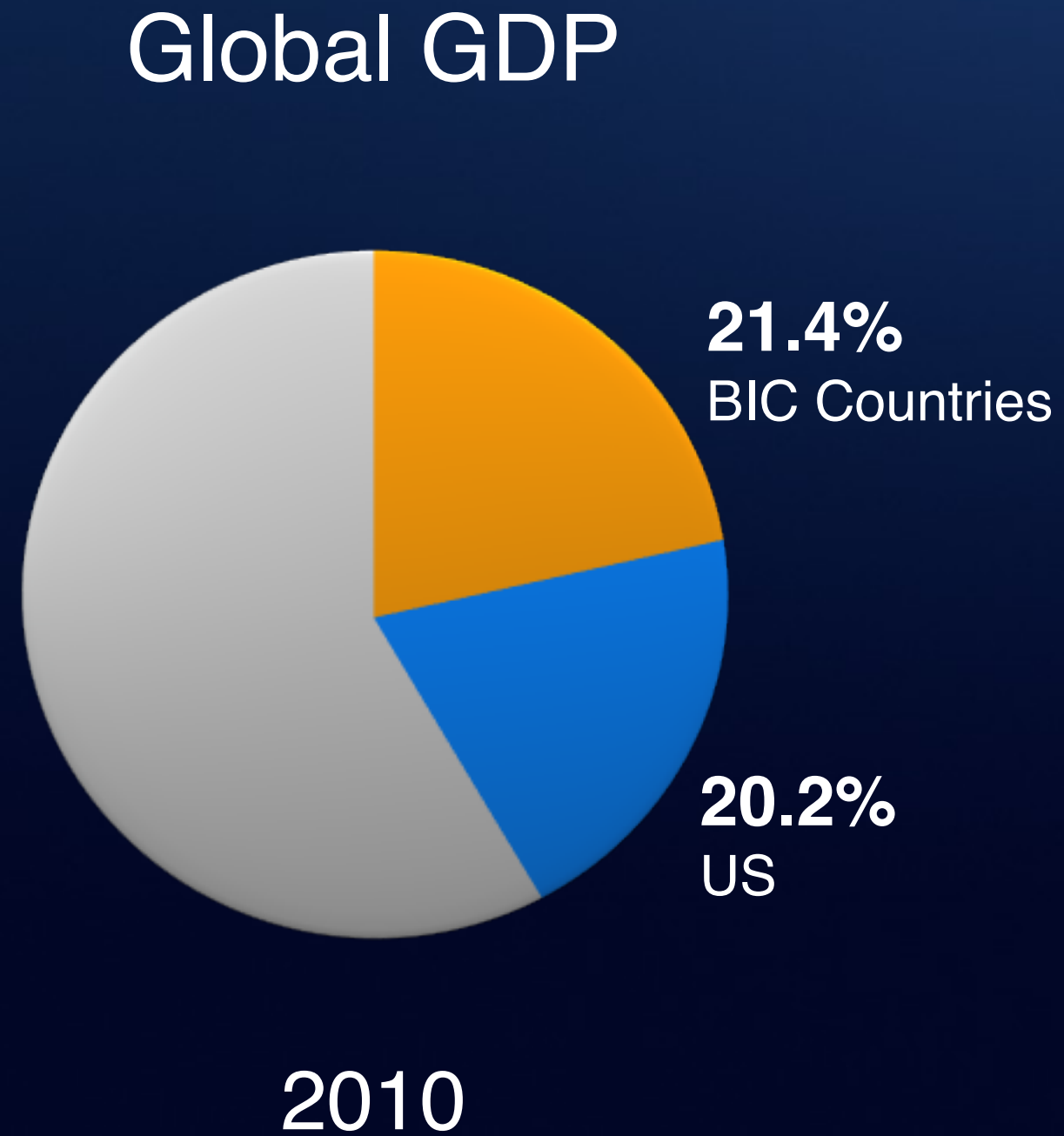
Source: U.S. Bureau of Labor Statistics (BLS): Current Employment Statistics (CES), Quarterly Census of Employment and Wages (QCEW); Moody's Analytics Estimates

The Core Problem: The Bulk of U.S. Growth Came from Non-Tradeable Sectors

98 percent

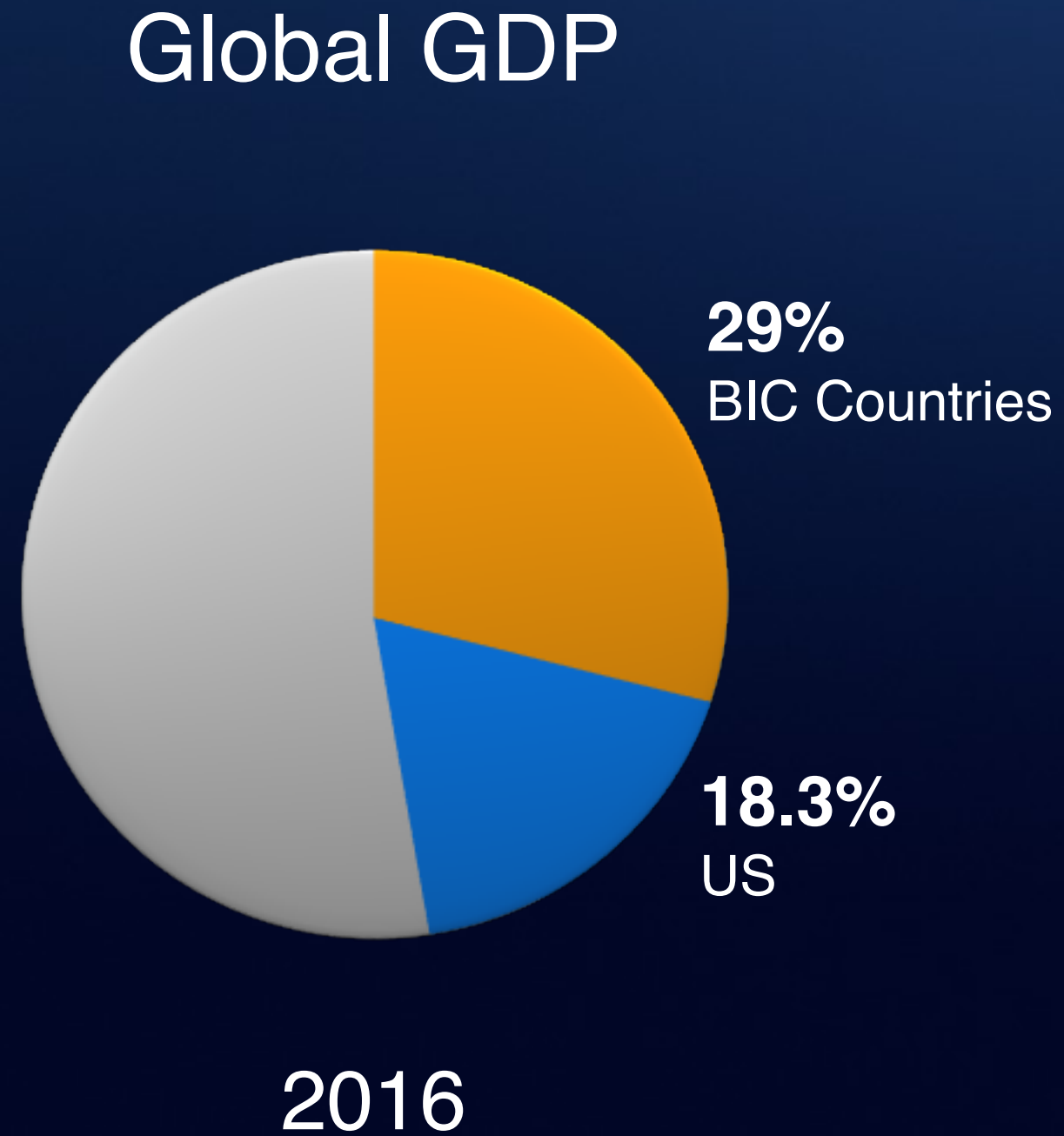
incremental job growth between
1990-2008 from non-tradeable
sectors

The Other Big Shift: Growth Markets Are Increasingly Located Outside of the U.S.



Source: International Monetary Fund, World Economic Outlook Database, April 2010; UN Department of Economic-Social Affairs, World Urbanization Prospects, 2009

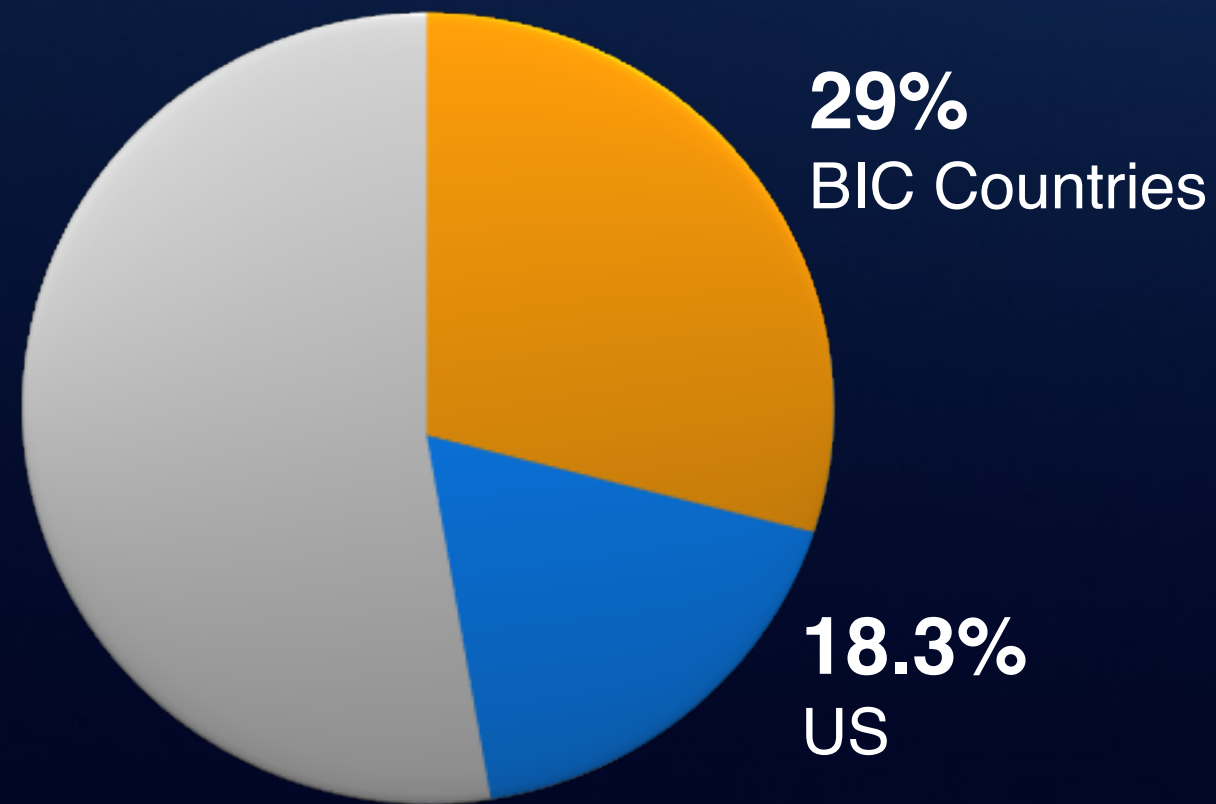
The Other Big Shift: Growth Markets Are Increasingly Located Outside of the U.S.



Source: International Monetary Fund, World Economic Outlook Database, April 2010; UN Department of Economic-Social Affairs, World Urbanization Prospects, 2009

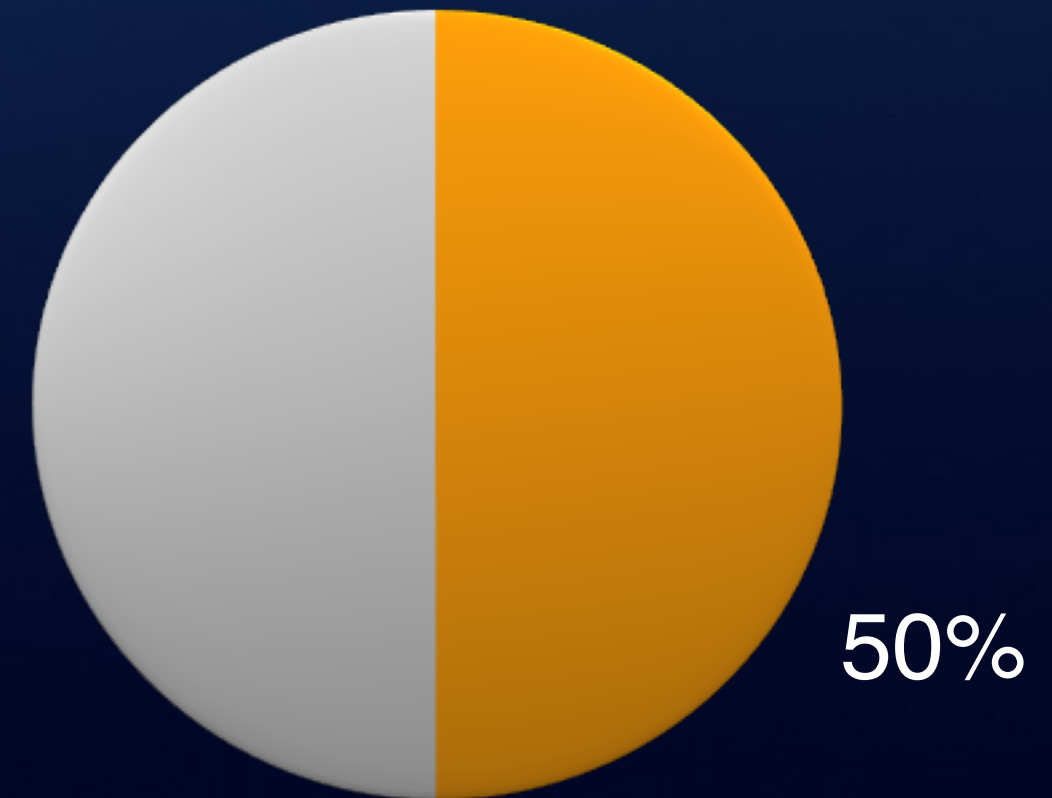
The Other Big Shift: Growth Markets Are Increasingly Located Outside of the U.S.

Global GDP



2016

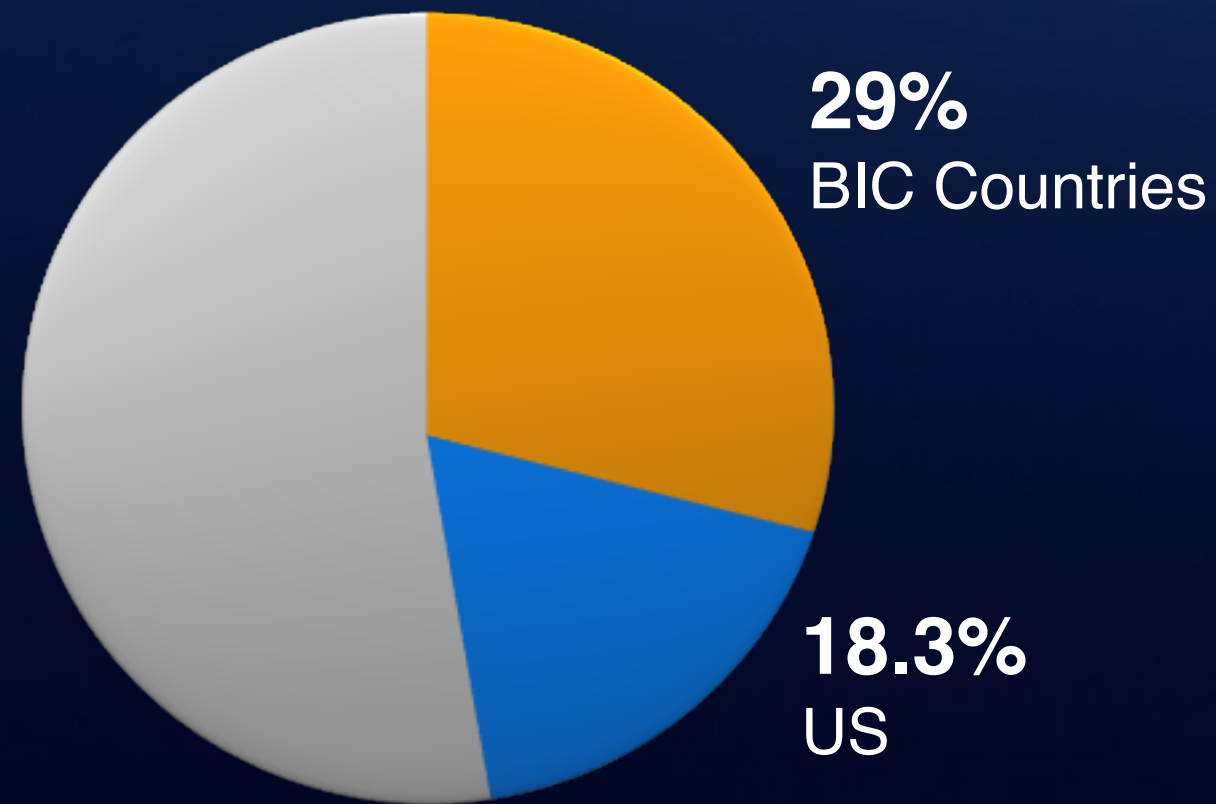
Global Metro Population



2009

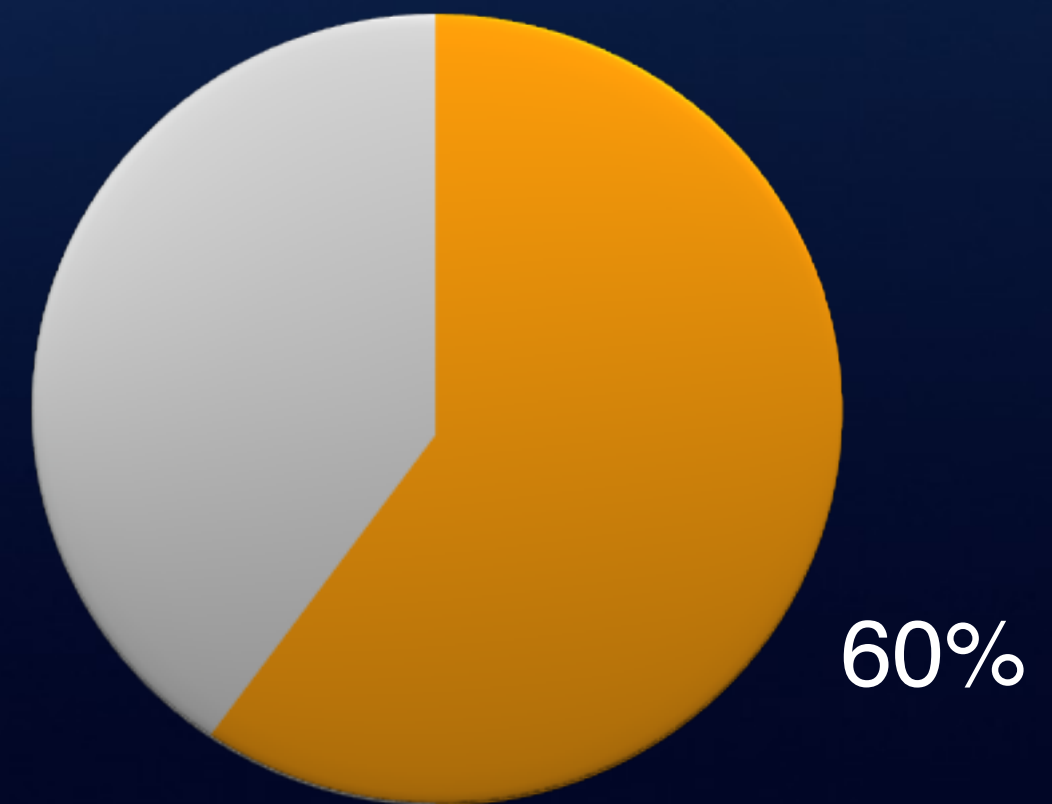
The Other Big Shift: Growth Markets Are Increasingly Located Outside of the U.S.

Global GDP



2016

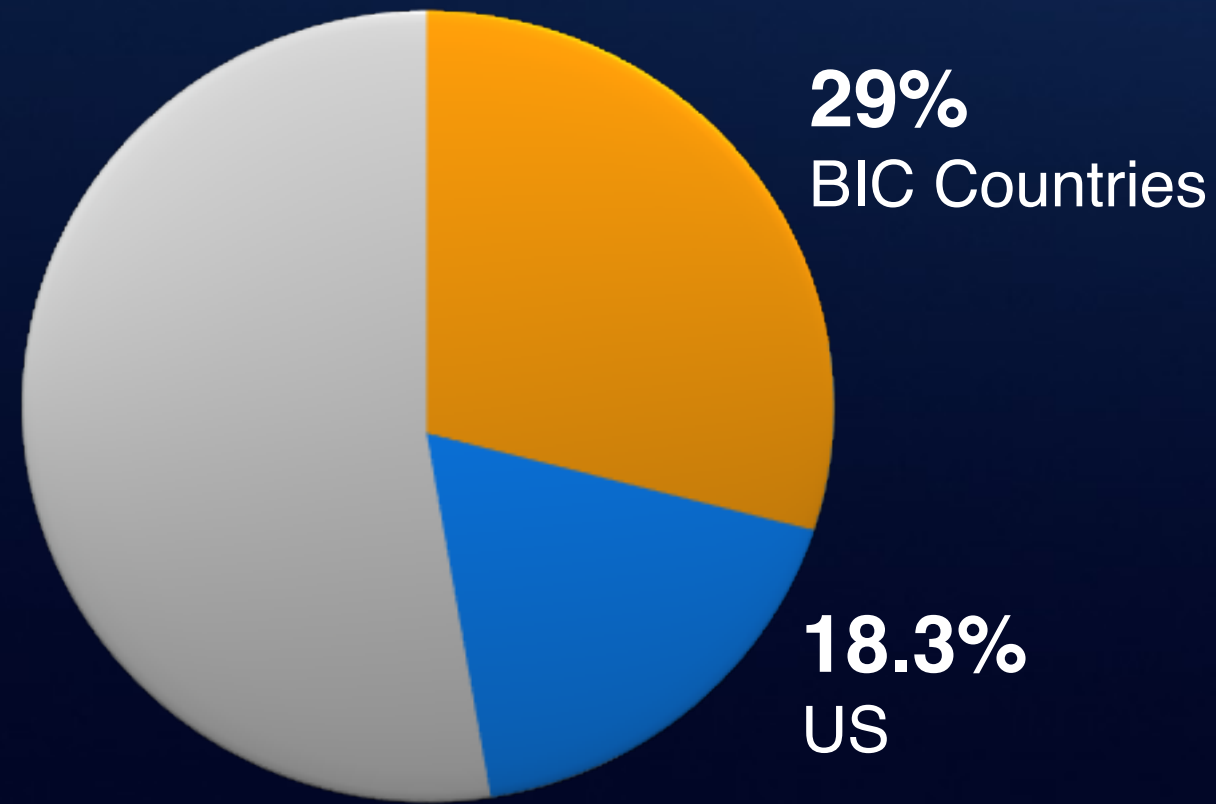
Global Metro Population



2030

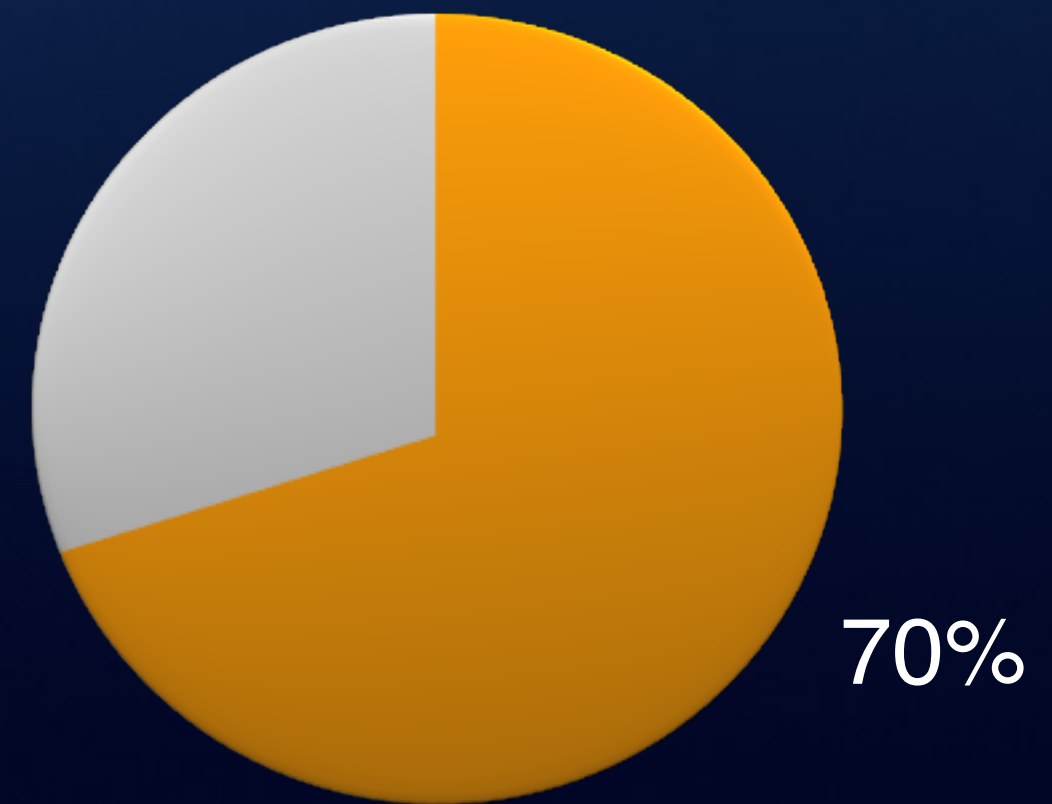
The Other Big Shift: Growth Markets Are Increasingly Located Outside of the U.S.

Global GDP



2016

Global Metro Population



2050

The Other Big Shift: Growth Markets Are Outside of the U.S.

\$21 trillion

global middle class consumption in
2000

The Other Big Shift: Growth Markets Are Outside of the U.S.

\$31 trillion

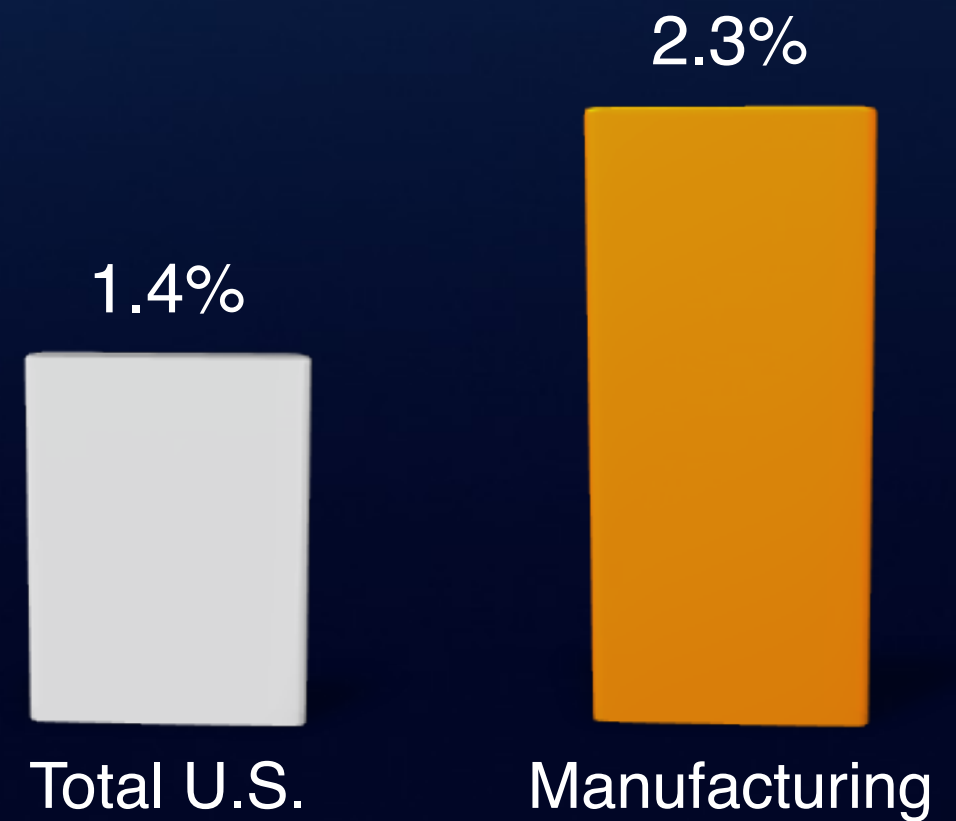
global middle class consumption in
2020

The winners in the next economy will be those who maximize global assets and tap new opportunities

Leaders Will Innovate in Manufacturing and Services



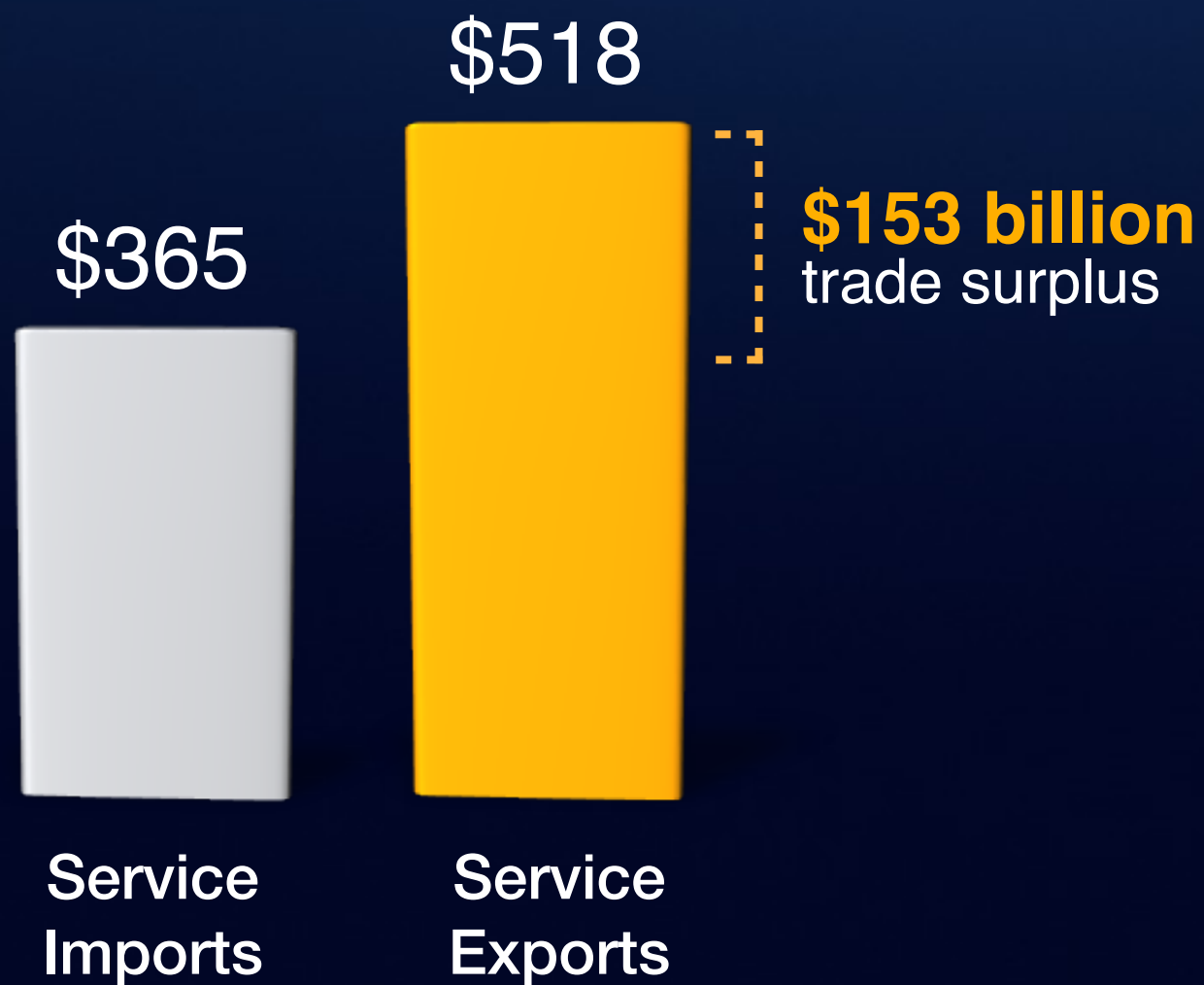
Employment Gains (2009Q4-2011Q3)



Source: Howard Wial, forthcoming, "Why Manufacturing Matters," Brookings.

Leaders Will Innovate in Manufacturing and Services

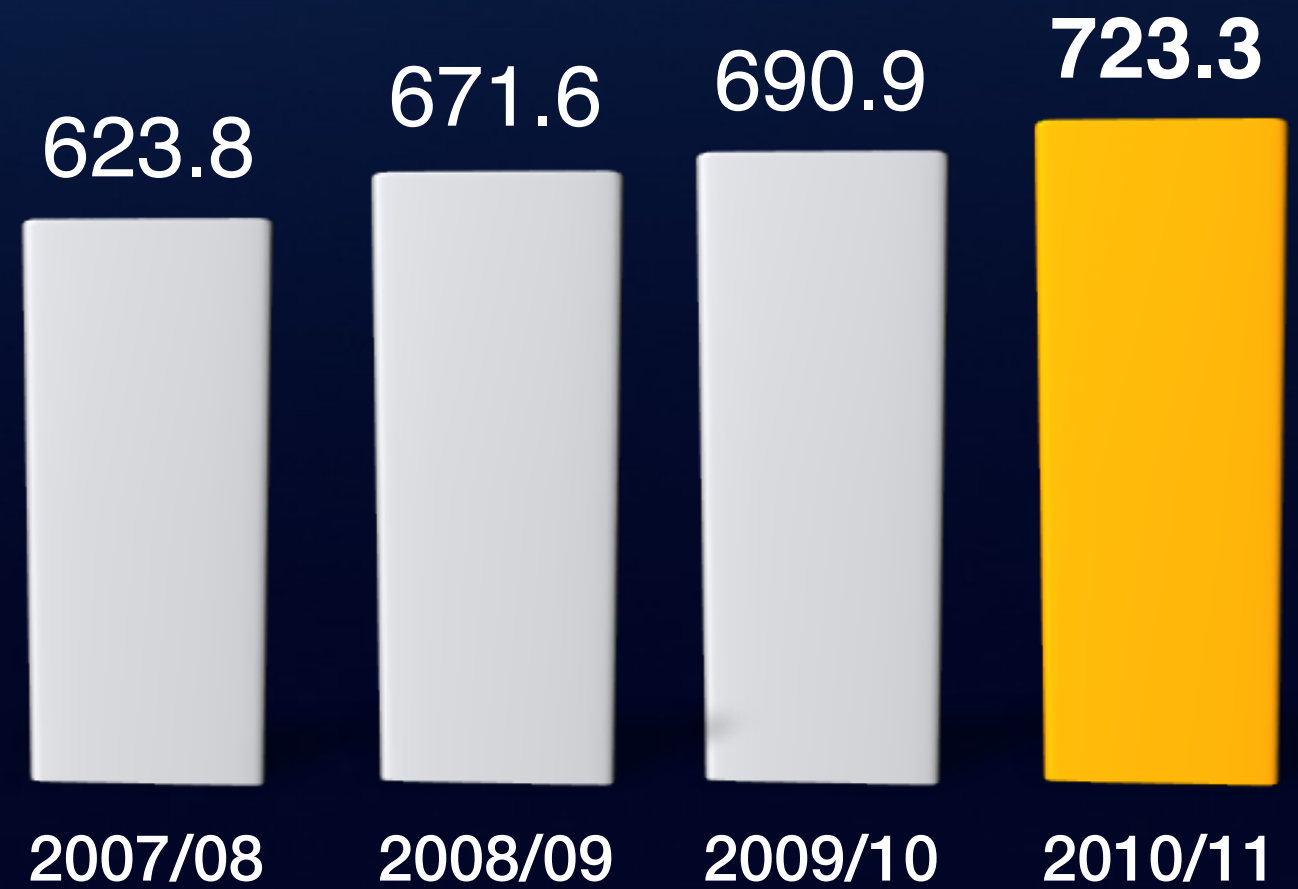
US Service Trade *2010, Billions*



Leaders Will Innovate in Manufacturing and Services



International
Student Enrollment
Thousands



Leaders Will Innovate in Manufacturing and Services



International
Student Enrollment
Thousands

\$21.2 billion
education exports

723.3



2010/11

Leaders Will Invent and Deploy Clean Economy Products and Services

\$53.9 billion
clean economy exports

Export Intensity
Yearly Export Earnings per Job





Economic Performance
2010-2011

- Highest Performing Metros
- Lowest Performing Metros

Source: Istrate, Berube & Nadeau,
"Global MetroMonitor 2011"

Going Global Pays Off for Small and Medium Enterprises

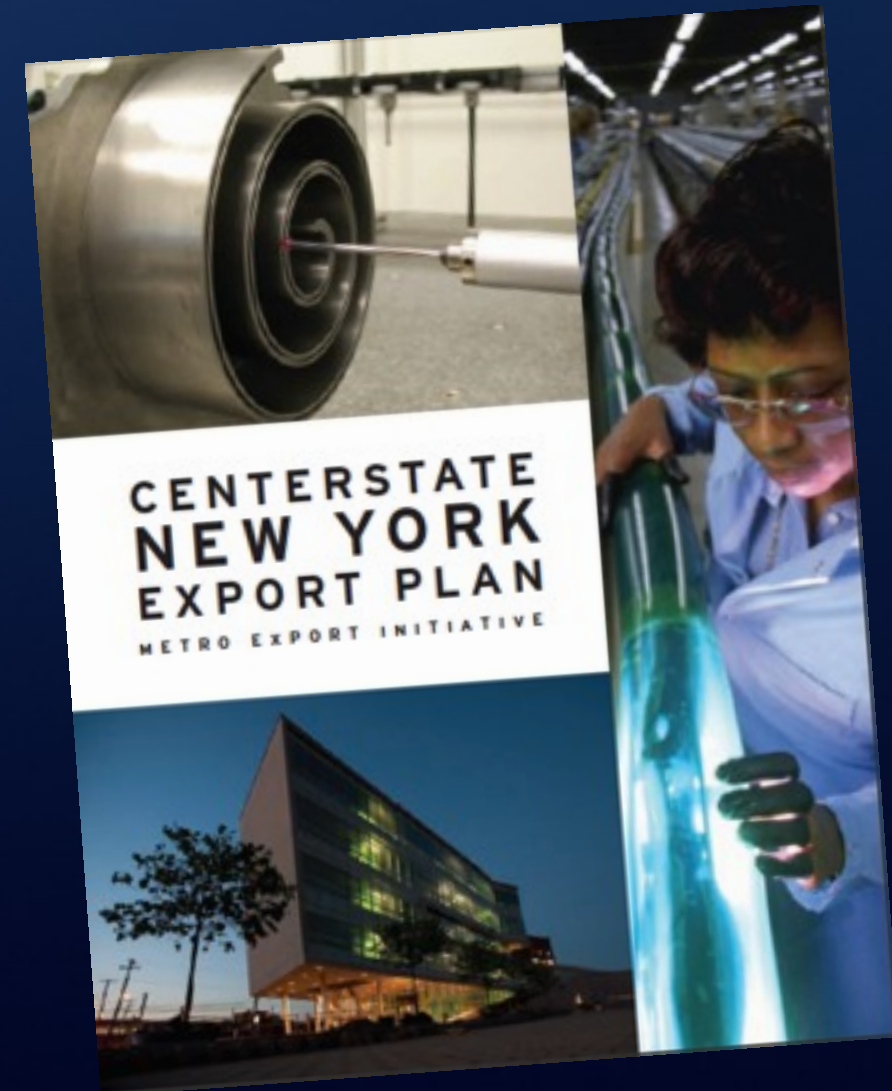
U.S. Firms Revenue Growth *(2005-2009)*



1 2 3

2

Good news: CenterState
NY is acting with intention
to excel in the next
economy



CenterState NY Is One of Four Leaders Adopting a Metropolitan Export Initiative



Exporting Is an Unnatural Act

1%

U.S. companies that export

Metro Export Plans Matter



1 2 3

3

CenterState NY is an under-exporter, but there are positive prospects for growth

The Syracuse Metro Area Has a Small Export Economy

\$3.3 billion

Syracuse's export volume, 2010
(Rank 72nd)

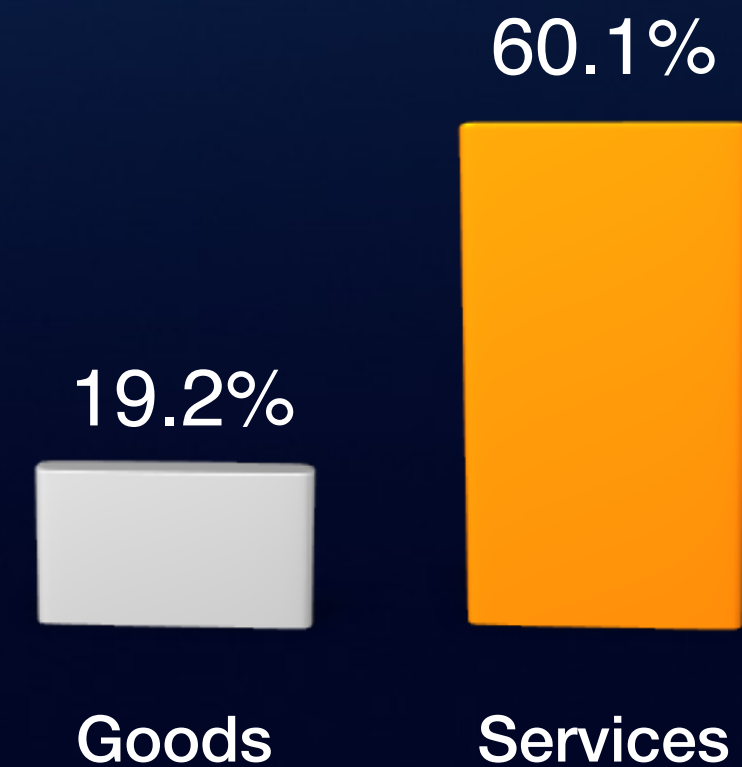
Source: Istrate and Marchio, "Export Nation 2012," Brookings. 2012.



Service Exports Represent a Growth Opportunity for Syracuse



Export Growth 2003-2010



Source: Istrate and Marchio, "Export Nation 2012," Brookings. 2012.

International Students Can Help Drive the Region's Services Exports

3,291

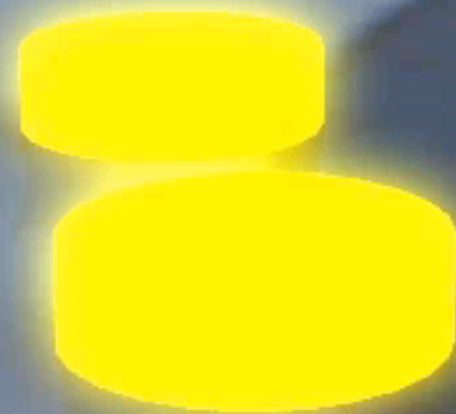
number of international
students in Syracuse, 2009
(Rank 32nd)

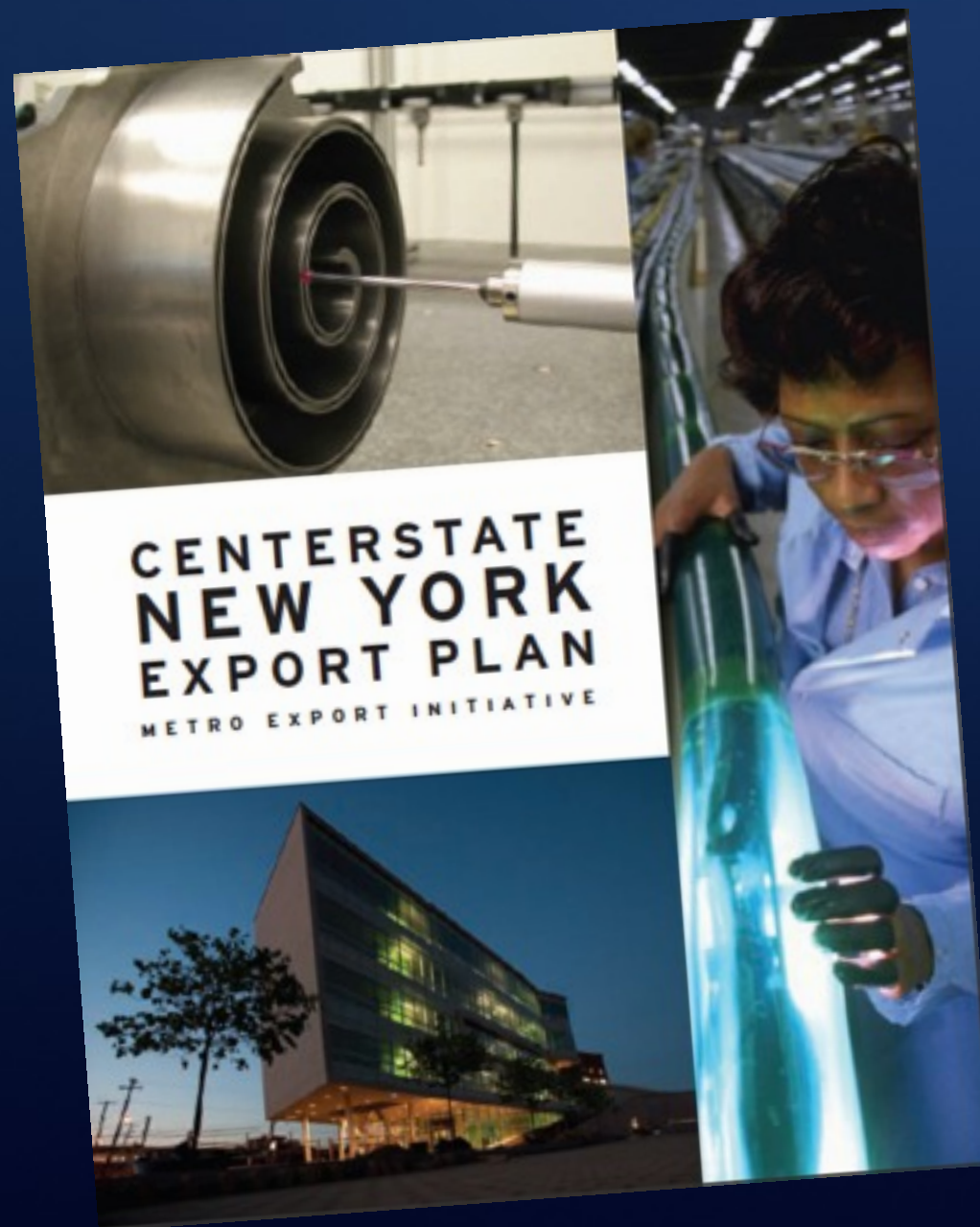


Source: Institute of International Education.

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