



A plan for building  
business opportunities globally.

# SAN ANTONIO 2013 EXPORTS PLAN

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INSPIRE



INVEST



EXPORT

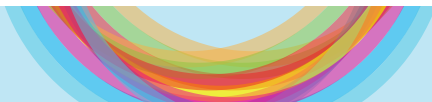
# VISION

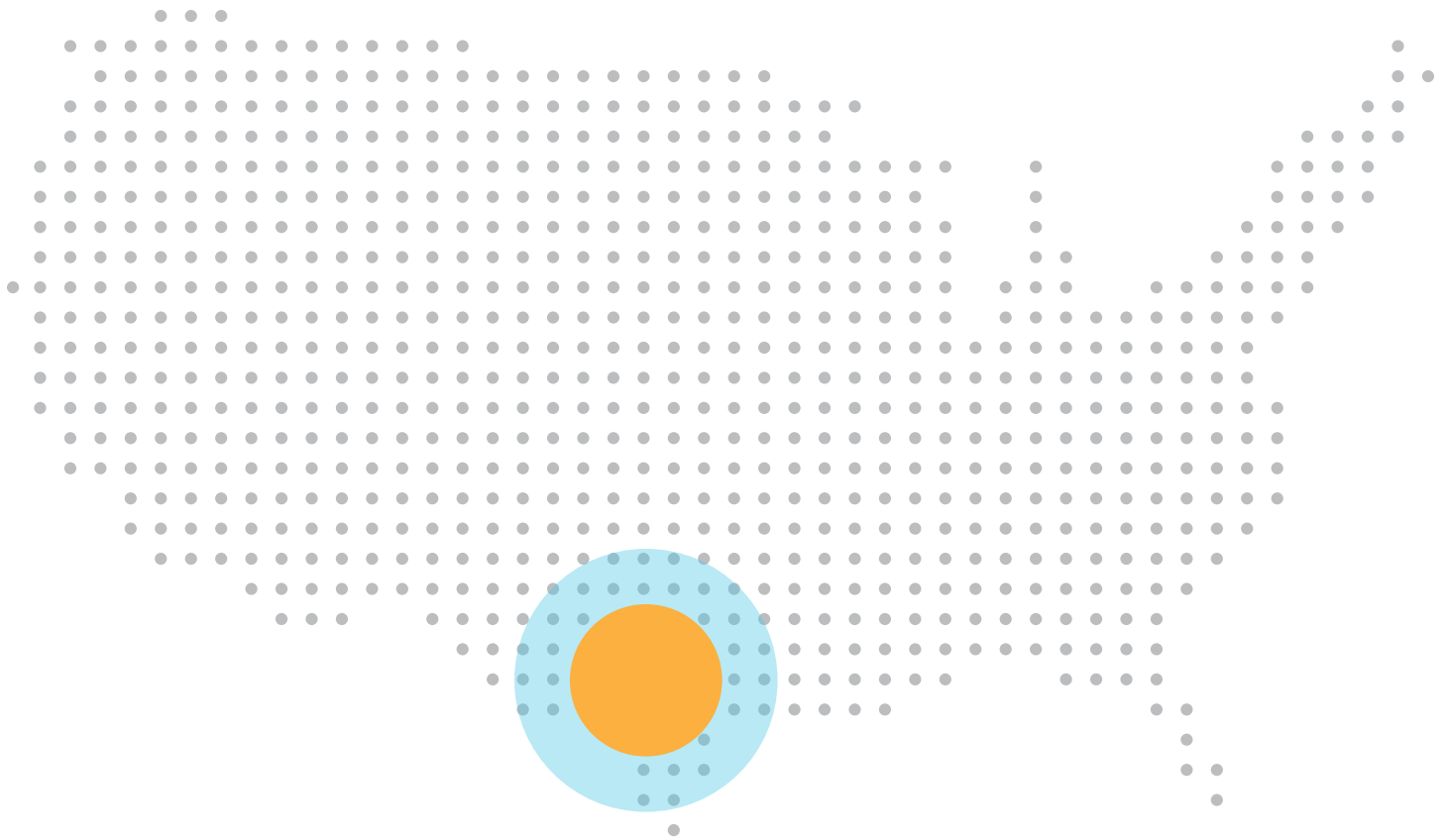
## Vision

The San Antonio region is transforming into a globally connected community. One that is quickly becoming a leading business center; an internationally recognized center for research, education and workforce development; a global destination for travelers; and a recognized leader in technology innovation.

Exports play a key role in moving our region forward as we take advantage of the benefits of global commerce. Following opportunity to every corner of the globe, our local businesses will be equally at ease selling their products to Dusseldorf as to Dallas. They will know how to handle trade regulations with Moscow as well as Monterrey. The San Antonio entrepreneurs building tomorrow's technologies will know how to manage business cycles in Bangalore as well as in Boston. And our local students will learn from their peers in Shanghai as well as those in Southtown.

San Antonio's future is one where its local businesses, citizens, government officials and students are increasingly globally engaged and active on the international stage. The San Antonio Export Strategy provides a road map where international business will become the new normal for San Antonio.





**“Our job is producing a certain product. That’s our specialty, not export logistics.”**

**- Business Interviewee and current exporter**



## Introduction

San Antonio is one of Texas' fastest growing and most dynamic cities. With its central location in Texas, it has become a strategic center for business between the United States and Mexico. San Antonio's population and economy have seen tremendous growth over the past eight years. The region is rapidly emerging as a national center for professional services, cyber-security, biosciences and health-care and aerospace, as well as a major manufacturing center.

International business has a long tradition in San Antonio. Since Spanish explorers reached the area in 1691, San Antonio has maintained close ties with Mexico and over the centuries has built a wealth of resources to help companies conduct business across the border. San Antonio is recognized as a premiere U.S. center for business with Mexico, with three trade promotion offices in Monterrey, Guadalajara and Mexico City, and the founding chapter of the Asociación de Empresarios Mexicanos business network.

In order to foster a more diverse and export-oriented economy, the San Antonio Export Strategy Working Group, in partnership with the Brookings Institution, developed an export strategy with the goal of assisting local small and medium sized companies diversify their market and adapt to a changing world through an international business focus. The San Antonio export strategy has four main objectives to achieve this goal:

- » Increase San Antonio's exports and the number of businesses engaged in exporting through a coordinated export assistance approach.
- » Create and sustain jobs through export growth.
- » Develop and foster a more globally engaged citizenry and export-oriented business culture and workforce.
- » Strengthen San Antonio's identity as an important U.S. export community.



# **“Are we going to lay people off or are we going to take on more international work?”**

**-Timothy Blonkvist, Overland Partners**

During the development of the strategy, the Working Group conducted an in-depth analysis of the San Antonio Metropolitan Statistical Area to determine the region's top exports and export markets, how local businesses become engaged in exporting, and what pitfalls and issues they have had to overcome.

Based on this information, we have developed a comprehensive set of strategies to make exporting more approachable for local business. The strategy provides greater coordination and enhances technical assistance among the export service providers, develops an export-oriented local workforce and business culture, and markets San Antonio as a strong regional export center.



# STRATEGY?

## Why An Export Strategy?

San Antonio shares many of the attributes of a successful exporting metro. The community is a hub of commerce and innovation in the regional economy of South Texas. It stands at the cross-roads of important interstate transportation corridors that facilitate trade along the North American Free Trade Area (NAFTA) corridor between Mexico and Canada. San Antonio can also draw upon a large labor pool to meet the needs of the business community in aerospace, manufacturing, professional services, and tourism. San Antonio has developed deep and long-standing international business connections through its cultural ties with Mexico and strong Sister City relations with Asia. San Antonio also has broad-based support among political officials, business leaders, and the education community to ensure its economy continues to grow and innovate for the shared prosperity of the community.

San Antonio's economy is diversified and stable. The U.S. economic downturn that began in 2008 did not affect the area as badly as other parts of the country. San Antonio benefited from the combined effects of low housing prices, a sizable presence of federal employees, tremendous growth from the 2005 Base Realignment and Closure, and a diversified industrial base. Moreover, exports played a key role to local businesses by replacing lost business in the U.S. with revenue from foreign markets.



Early in the recession recovery period, San Antonio was among the top ten U.S. metro areas for export growth with a seventh place national ranking from 2009 to 2010. The region ranked eighteenth in the period from 2003 to 2008. Although some of the region's largest trading partners experienced declines, they were offset by strong growth in emerging markets that allowed local businesses to tap non-traditional markets for new sources of revenue. The lesson learned is that for San Antonio's economy to continue to grow and to provide good high-paying jobs to the community, local businesses will need to begin to integrate exporting into their overall business strategy.

Despite the positive export-related growth, San Antonio and the U.S. are under-exporters when compared to peer cities and countries. This leaves our region heavily dependent on the U.S. domestic market and susceptible to national economic downturns. Although the U.S. economy is recovering, over the short term the U.S. market is expected to grow more slowly than industrializing markets and offer the best market opportunities for our local businesses.

Moreover, changes in global supply chains and shipping logistics make San Antonio a key part of manufacturer's resurgence through re-shoring to the U.S. or near-shoring to Mexico. San Antonio is well positioned to take advantage of this resurgence and can leverage it to increase exports to well-established markets, build connections to new markets, and provide new business opportunities for local companies that create good-paying jobs and further accelerate the community's growth.

This export strategy is timely because it complements the goals and objectives of Forward San Antonio: A Strategic Plan for Economic Development. The plan provides strategies for San Antonio's sustained economic success by identifying and capitalizing on its competitive advantages, leveraging its community assets, improving the economic climate, and integrating international business into the community's economic development strategy with emphasis on growing exports.



# FINDINGS

## Market Assessment Key Findings

San Antonio is a growing exporter and has tremendous opportunity for further growth, but lags in key exports metrics compared to its peer cities. Although San Antonio's deep business connections with Mexico are well known on both sides of the border, less well known is that San Antonio's exports extend to every corner of the globe. San Antonio's largest local companies are producing products sold in at least 72 countries. The region's top 12 export markets represent five continents with the NAFTA, Europe and Asia as the largest regional markets for San Antonio's exports.

**Finding:** San Antonio lags behind its peer cities in exports as a percentage of Gross Domestic Product (GDP) as well as export related jobs, but experienced strong growth over the last decade.

In 2010, exports represented 8.2 percent of San Antonio GDP, but accounted for more than 9.4 percent of GDP in peer cities; a difference of more than \$3 billion in GDP. However, the San Antonio area led its peer cities in total export growth from 2003 to 2010. Over that period, San Antonio's exports increased 74.6 percent compared to approximately 50 percent for peer cities.

San Antonio also lags behind its peers in terms of export-related employment. Locally, exports support 5.6 percent of metro area employment. With 26,740 direct export production jobs and 46,807 total export supported jobs, San

Antonio has more than 25 percent fewer export-related jobs than its peers; a difference of approximately 16,000 jobs. However, San Antonio also surpassed its peers in export-related job growth from 2003 to 2010; with growth rates roughly double those of its peer cities.



**“When you’re a small business your most valuable resource is time.”**

**— Business Interviewee and non-exporter**

**Finding:** San Antonio companies are more reactive exporters than intentional.

Less than half of the companies currently exporting made exports an intentional part of their business strategy. The majority “fell into” exporting as a reaction to a request from a foreign buyer. They had to work backward through the export development process to fill the order. That initial push into exporting exposed them to the benefits of selling to a wider audience and many have become intentional exporters as a result.



**Finding:** Companies that do export view exporting as an important part of their growth strategy and those who don’t, are reluctant to start exporting.

Of the companies surveyed, those not currently exporting showed disinterest in starting. The reluctance to explore exporting appears to be the result of a lack of knowledge about the opportunities in foreign markets and a lack of familiarity with the exporting process. More than one quarter of San Antonio businesses believe their good or service is not exportable, while another 20 percent admitted to a lack of exporting knowledge. As a result, nearly one third of all companies surveyed were more interested in expanding within the U.S. market before considering exporting.

Meanwhile, two thirds of companies that were already exporting were interested in, or already expanding to new markets. Of those companies, approximately 10 percent said the limitations in their operational capacity or lack of financing were the primary barrier to growing their business internationally.

**Finding:** Non-exporting companies were reluctant to commit what they perceived to be heavy resources toward exporting.

Non-exporters believe that exporting their product requires adding full-time staff focused on international sales, which will detract from their ability to service the domestic market. However, the majority of local exporting companies interviewed rely on distributors or third-party sales personnel to market their products. This allows exporting companies to keep costs low and eliminate the financial burden of establishing an in-country office. In addition, local companies also expressed an interest in hiring local consulting services to handle export finance and regulation matters. Consultants with this type of experience are already available locally.

Among the companies interviewed that do export, the level of awareness about local export service providers is good. Although few companies interviewed had taken advantage of these services, those that do consistently rank the services as “very good.”

**Finding:** Access to the region's export service system is confusing.

Many of the consulting services desired by interviewed companies are readily available from local export providers. There is a healthy supply of service providers already active in the region. However, the business community perceives a lack of coordination among the services providers that causes confusion about what services are available and which organizations provide them. To provide more clarity, many companies expressed the need to have a central coordinator who understands their issues and can refer them to the export service provider who can help solve them.

**Finding:** Mexico and NAFTA are key opportunities for local exporters.

The region's long-standing business ties to Mexico are an advantage to many local businesses. The signing of NAFTA 20 years ago began a long process of business integration which now allows not only cross-border sales, but also shared production processes that are best demonstrated by the Texas-Mexico Automotive Super Cluster. Today, the region sits at the center of the booming NAFTA corridor running from Mexico up to Canada. Local operations like Toyota and IDZ Technologies already take advantage of these market efficiencies, and new manufacturing companies are exploring the San Antonio region to shorten supply chains and serve nearby customers in Mexico. For others, the region's business relationship with Mexico provides valuable experience as a first stop on the path to exporting and international business. This makes business with Mexico one of San Antonio's most important specializations.

Looking into the future, the U.S. is already exploring opportunities to further utilize the NAFTA relationship to expand global free trade and open new markets to local businesses. The Trans-Pacific Partnership negotiations are well underway between nine Asian countries and the U.S., Mexico and Canada with the goal to enhance trade and investment, economic growth, and the creation and retention of jobs. In addition, the U.S. and the European Union (EU) have just embarked on negotiations to establish a free trade agreement that will complement the existing free trade agreement between the EU and Mexico and the soon-to-be completed free trade agreement between the EU and Canada. Once completed, both free trade agreements would provide even greater export opportunities for San Antonio's local businesses and position the region as a key trade hub in North America.

# EXPORT MARKET

## Export Market Findings

### SAN ANTONIO'S TOP 10 EXPORT MARKETS

# 2010

San Antonio's export market diversity is well balanced among Europe, North America, and Asia with each receiving approximately one quarter of the region's exports.

TRANSPORTATION  
EQUIPMENT



TRAVEL  
& TOURISM



MACHINERY



PROFESSIONAL  
SERVICES



CHEMICALS



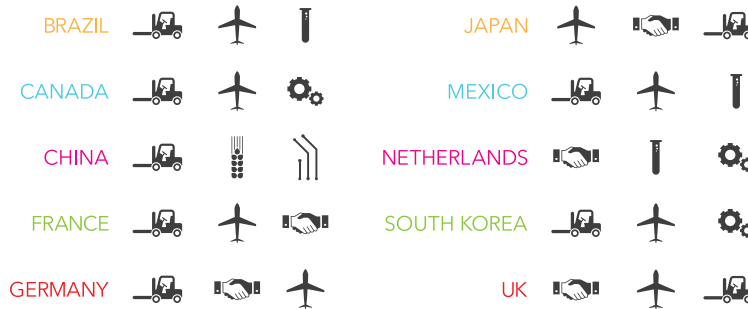
AGRICULTURAL  
PRODUCTS



COMPUTERS  
& ELECTRONICS

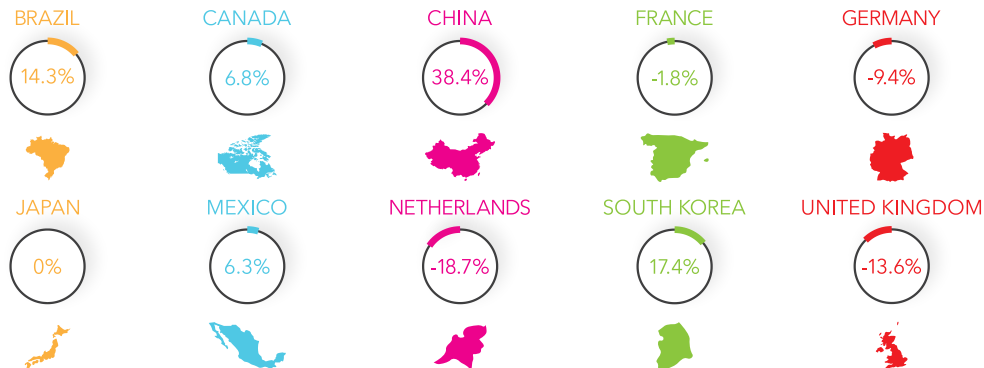


#### TOP 3 EXPORT PRODUCTS TO TOP 10 MARKETS



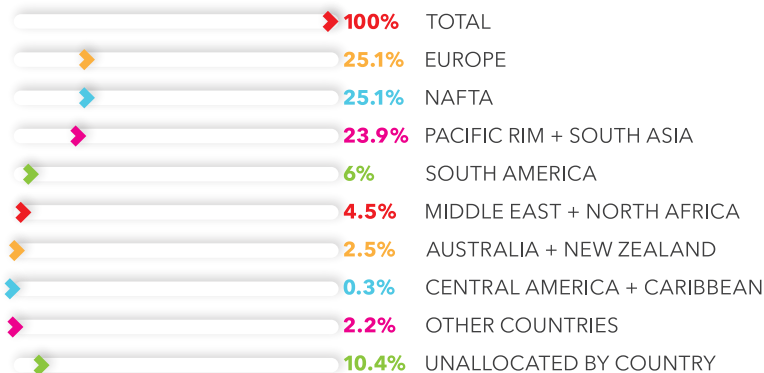
SAN ANTONIO HAS DIVERSIFIED EXPORT MARKETS

#### 2008-2010 GROWTH RATE



SAN ANTONIO'S TOTAL EXPORTS GREW BY 2.2%

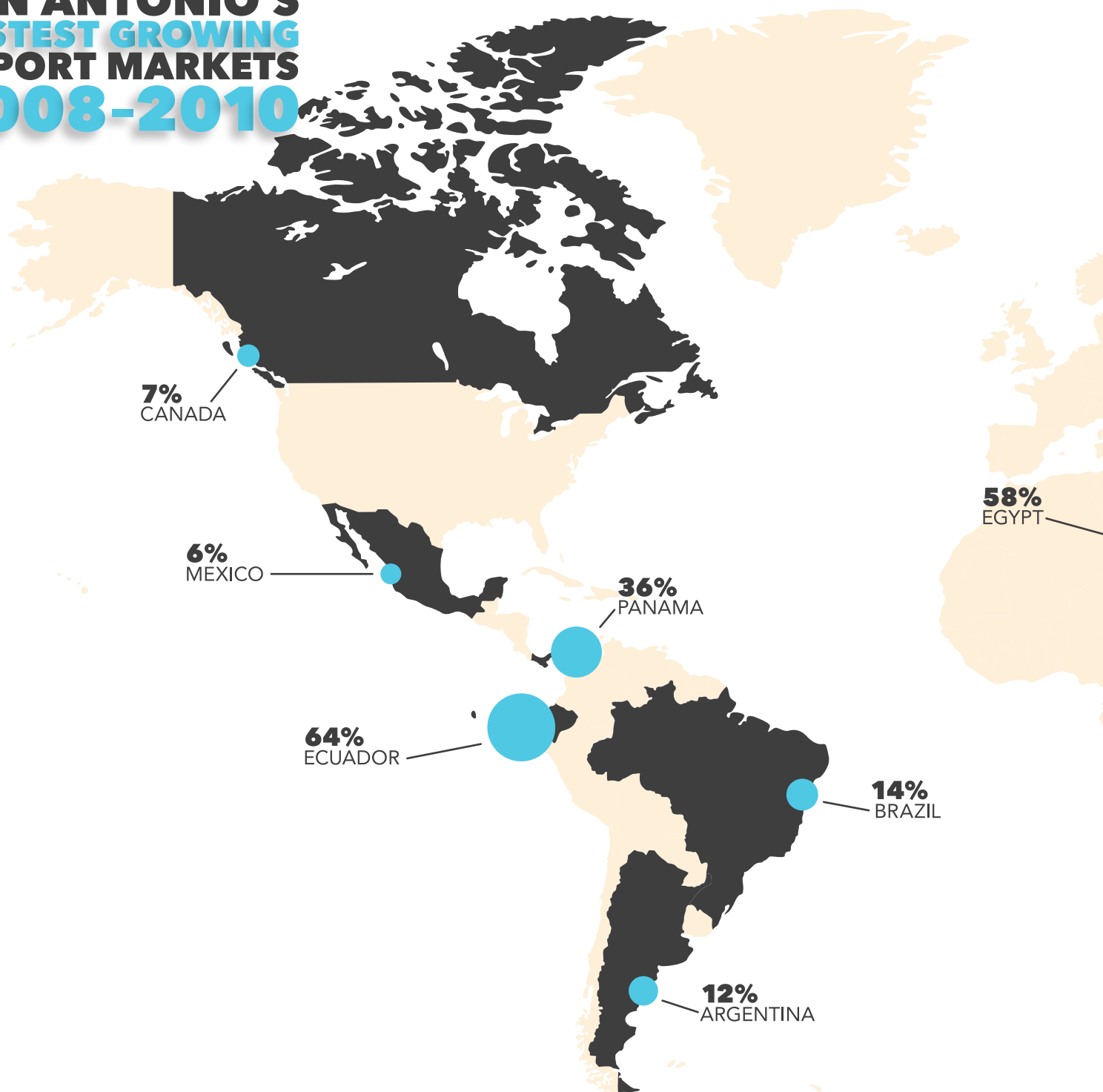
#### REGIONAL EXPORTS IN 2010



SAN ANTONIO'S EXPORTS ARE REGIONALLY BALANCED

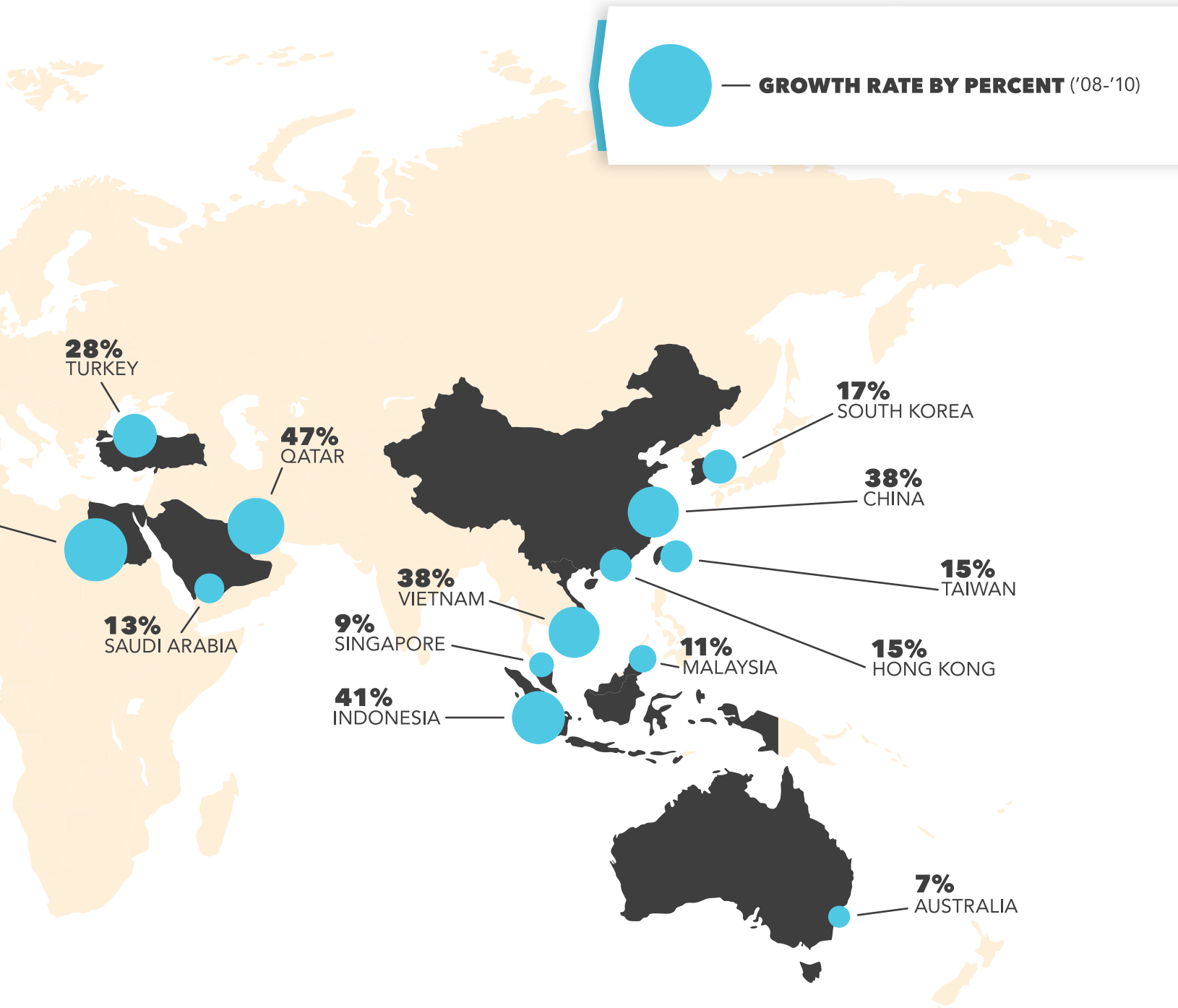


# SAN ANTONIO'S FASTEST GROWING EXPORT MARKETS 2008-2010

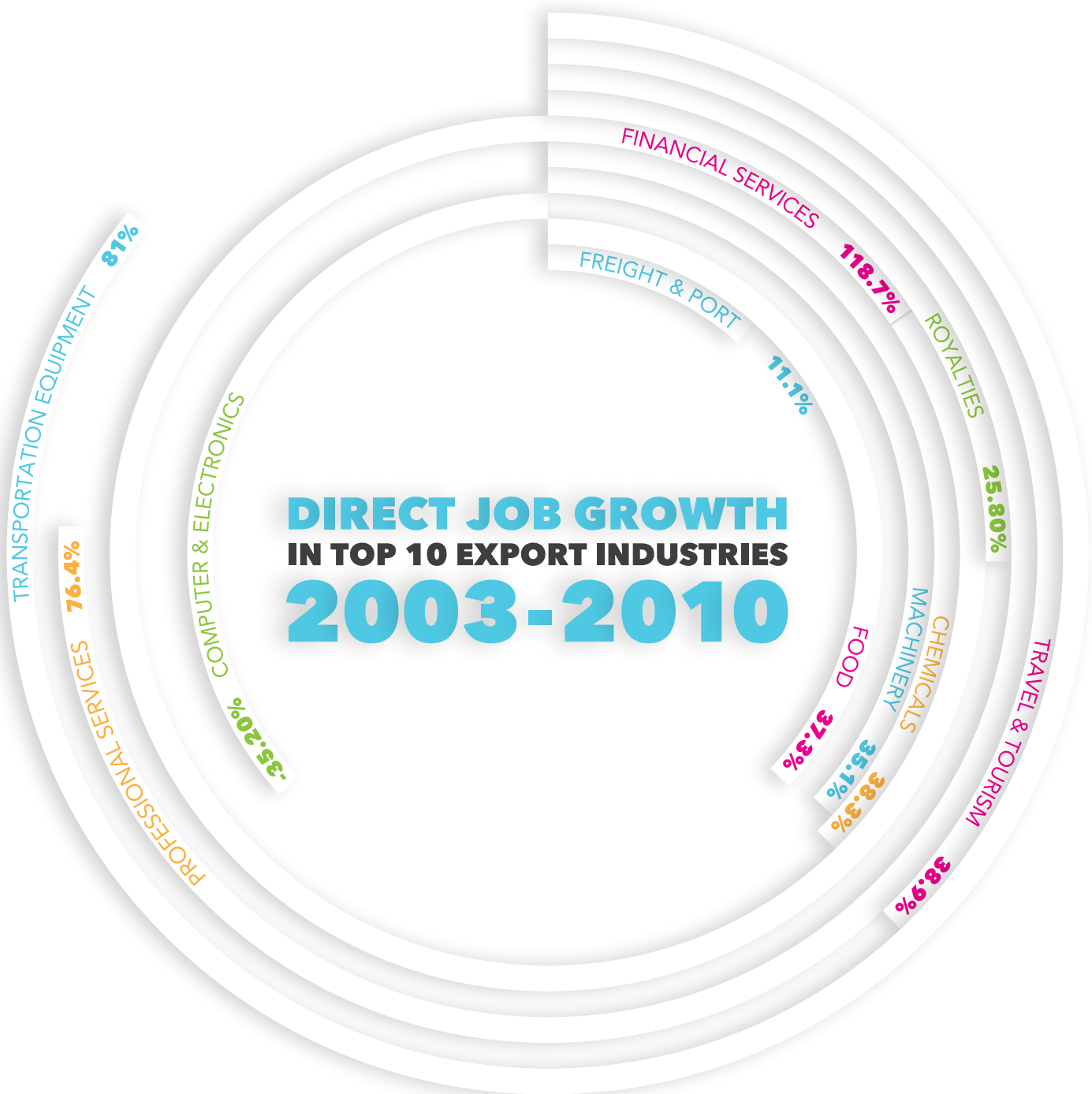




— **GROWTH RATE BY PERCENT** ('08-'10)



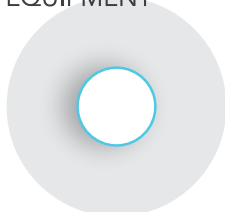
**SAN ANTONIO'S BIGGEST OPPORTUNITIES  
LIE IN **ASIA** & **LATIN AMERICA****



# TOP 10 DIRECT EXPORT JOBS BY INDUSTRY 2010

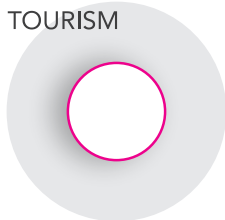
TOTAL DIRECT EXPORT  
JOBS IN 2010  
FOR TOP INDUSTRIES  
**26,740**

TRANSPORTATION  
EQUIPMENT



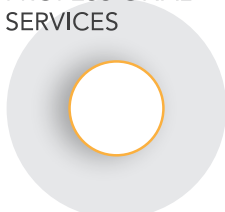
**3,809**

TRAVEL &  
TOURISM



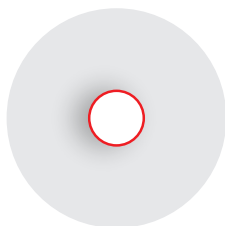
**5,883**

PROFESSIONAL  
SERVICES



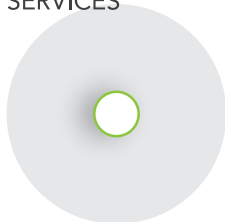
**5,491**

ROYALTIES



**1,928**

FINANCIAL  
SERVICES



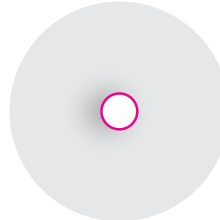
**1,299**

CHEMICALS



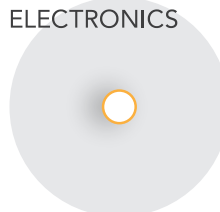
**350**

MACHINERY



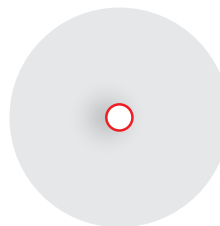
**870**

COMPUTERS &  
ELECTRONICS



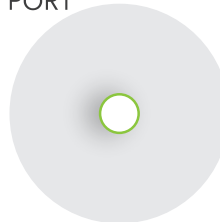
**730**

FOOD



**486**

FREIGHT &  
PORT



**998**



# SAN ANTONIO METRO AREA EXPORTS



EXPORTS

**\$6.7B**



EXPORTS AS % GDP

**8.2%**



DIRECT EXPORT JOBS

**26,740**



EXPORT SUPPORTED JOBS

**46,807**



TOTAL EXPORT GROWTH  
(2003-2010)

**74.6%**



ANNUAL EXPORT GROWTH  
(2003-2010)

**8.3%**



SERVICE EXPORTS  
(% OF TOTAL)

**42.6%**



MANUFACTURED EXPORTS  
(% OF TOTAL)

**53.5%**



EXTRACTIVE INDUSTRIES  
(% OF TOTAL)

**3.9%**

## SAN ANTONIO BEATS PEER CITIES IN



TOP 10  
EXPORTS BY  
INDUSTRIES  
& GROWTH  
RATES

# SAN ANTONIO'S TOP 10 EXPORT INDUSTRIES 2003-2010

PRODUCT  
GROWTH  
IN VALUE  
2003-2010

TRANSPORTATION  
EQUIPMENT



PROFESSIONAL  
SERVICES



FINANCIAL  
SERVICES



MACHINERY



FOOD



TRAVEL  
& TOURISM



ROYALTIES



CHEMICALS



COMPUTERS  
& ELECTRONICS



FREIGHT &  
PORT SERVICES



TOTAL  
EXPORT  
GROWTH



REAL DOLLAR  
AMOUNT  
IN MILLIONS

2003

2010

TRANSPORTATION  
EQUIPMENT



TRAVEL  
& TOURISM



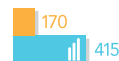
PROFESSIONAL  
SERVICES



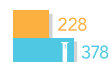
ROYALTIES



FINANCIAL  
SERVICES



CHEMICALS



MACHINERY



COMPUTERS  
& ELECTRONICS



FOOD



FREIGHT &  
PORT SERVICES



TOTAL EXPORTS  
(USD MILLIONS)



# STRATEGIES

## An Export Strategy for the San Antonio Community

San Antonio's economy has grown tremendously over the past 10 years. New companies such as Toyota and Medtronic now call the San Antonio area home and existing companies such as USAA, Southwest Airlines, Rackspace and DPT Labs have all experienced significant growth and brought new jobs to the community. San Antonio has been fortunate but we cannot rely solely on major relocations or expansions to fuel economic growth. We also need to invest in our local small and medium sized companies and our workforce in order to achieve balanced, sustainable, and durable growth.

The export strategy being proposed is broad in scope and holistic in nature. It is meant to help address the "big picture" of economic development and requires involvement from across the community. For the strategy to be successful, it will need to rely heavily on partnerships with existing export service providers, workforce agencies, local universities and colleges, and the economic development community.

### The San Antonio export strategy has four main objectives:

- » Increase San Antonio's exports and the number of businesses engaged in exporting through a coordinated export assistance approach.
- » Create and sustain jobs through export growth.
- » Develop and foster a more globally engaged citizenry and export-oriented business culture and workforce.
- » Strengthen San Antonio's identity as an important U.S. export community.

**"It was a no brainer. We are the premium place for setting up a business to service Mexico."**

**- Business Interviewee and current exporter.**

# FOR THE SAN

The plan consists of four core strategies – Identify, Target, Engage, and Market that are designed to help achieve the region’s goals and objectives through a holistic export strategy.

- » **Identify:** Designate an organization to coordinate global business initiatives and institutionalize the importance of global trade in the community.
- » **Target:** Establish the San Antonio Export Assistance Team (SEAT) to complement the Business Retention and Expansion program to provide technical assistance to current exporters and ready-to-export businesses.
- » **Engage:** Develop and establish programs to foster a more globally engaged citizenry and export-oriented business culture and workforce.
- » **Market:** Develop and implement an international business branding campaign to establish an identity and market San Antonio’s key industry sectors globally.

The strategy’s scope is broad and will require the input and assistance of a number of organizations in the community to implement. The San Antonio Export Strategy Working Group recommends the Free Trade Alliance of San Antonio (FTA) coordinate the implementation of the export strategy with the assistance of the community’s export service providers, workforce agencies, local universities and colleges, and the economic development community.

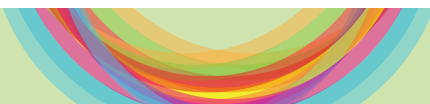
As a community organization, FTA has the ability to convene local organizations to carry out initiatives that meet the goals and objectives of the broad-based export strategy. Moreover, by working with existing export service providers, workforce development agencies and the economic development community it can facilitate the information exchange between businesses and service providers.

The San Antonio Export Strategy Working Group believes community support of FTA is essential to the successful implementation of the export strategy. Only through working together can the goals of the export strategy be achieved for the benefit of the community.



A lead community organization should coordinate the implementation of the export strategy, facilitate dialogue between local businesses and the economic development community to mainstream exporting, and convene local organizations to carry out the broad-based export strategies. To accomplish this strategy, the Free Trade Alliance of San Antonio will:

- » Dedicate management level staff and support resources to oversee the coordination of the export strategy.
- » Become a clearinghouse for information about local export resources. This includes managing an export-oriented website that responds to the needs of our local businesses and entrepreneurs with information on trade missions, events, and existing resources that can help them enter new markets.
- » Act as a referral agent based on a business' needs to create a bigger export pipeline to the community's existing export service providers such as University of Texas-San Antonio International Trade Center and the U.S. Commercial Service.
- » Work closely with existing providers to maintain and enhance the export services pipeline that directs companies to providers who can help meet specific business needs.
- » In cooperation with local export service providers, define target industries and markets for export growth opportunities and coordinate industry-focused trade promotion activities.
- » Facilitate the development of industry-focused trade promotion activities to include trade missions based on the targeted industries and countries as defined by the San Antonio Export Strategy.
- » Establish and track export-related metrics and lead the community's efforts to reach broad export goals by 2020 such as tripling the region's exports, create 13,000 direct export jobs and increase the number of companies exporting by 50% to complement the goals of the National Export Initiative and the community's economic development, workforce and education goals in SA 2020.



# TARGET

Target

The Business Retention and Expansion (BRE) Program, whose purpose is to retain and expand local business in key industry clusters and encourage job growth in the local corporate base, should integrate export assistance into its existing business service program to meet the goal of helping companies diversify their market and adapt to a changing world through an international business focus.

- » The San Antonio Export Assistance Team (SEAT) should be established as an integral part of the community's BRE program to provide technical export assistance to current exporters and ready-to-export businesses to increase their revenues and promote job creation.
  - › The FTA will coordinate the export assistance activities of the SEAT whose members include representatives from local export service providers such as the UTSA International Trade Center, U.S. Commercial Service, and other local export-service providers.
  - › The FTA will proactively collaborate with the BRE program to provide export assistance through the SEAT.
  - › The FTA will develop outreach strategies to market the SEAT's export resources to the business community and close the export knowledge gap and get businesses exporting faster.
- » The SEAT will meet the needs of the area's diverse economy by assisting all companies interested in exporting but should also focus on providing export assistance to companies in the following industry sectors identified in Forward San Antonio: A Strategic Plan for Economic Development:
  - › Aerospace—Aircraft, Engine and Parts Manufacturing and Maintenance Repair and Overhaul
  - › Information Technology—Security and Software Development and Data Hosting and Processing
  - › Biosciences—Medical Instruments and Supplies, Medical Devices, Generic Pharmaceuticals and Biotechnology
  - › Energy—Solar and Wind Manufacturing and Shale related services
  - › Travel & Tourism—International Industry Conventions and Medical Tourism

**The SEAT will provide export market research and analysis to companies based upon their export goals and strategies, while focusing on the following countries:**

#### Americas

- › Brazil
- › Canada
- › Mexico

#### Europe/Middle East

- › Spain
- › Germany
- › United Kingdom
- › France
- › Turkey
- › Israel

#### East Asia

- › China
- › Japan
- › South Korea
- › Taiwan
- › India

# ENGAGE

Engage

A globally engaged business community and internationally fluent workforce are essential components for diversifying San Antonio's economy and adapting to a changing world. FTA will facilitate dialogue among community partners to establish programs to foster a more globally engaged citizenry and export-oriented business culture and workforce. In addition, FTA will:

- » Utilize the established business networks and resources in the community to allow current exporters to share best-practices and potential export opportunities with other companies.
- » Develop an export assistance program for entrepreneurs and start-up businesses to integrate exporting into the development of their business plan.
- » Work with Alamo Colleges, Workforce Solutions Alamo and local businesses to establish Just-in-Time export technical training programs to meet the needs of local businesses for a workforce knowledgeable in exporting.
- » Expand existing international business plan development programs by the FTA and the University of Texas-San Antonio International Trade Center.
- » Promote a strong international affairs learning program in cooperation with local high schools and universities to promote greater understanding and interest in international affairs and international business as a viable career path.
- » Convene a task force comprised of representatives from local universities, the business community, and international affairs experts to discuss how to integrate international trade, finance, and business curriculum into existing undergraduate and graduate degree programs in San Antonio to create a strong talent pool of international business experts for local businesses.

# MARKET

## Market

An international marketing and branding campaign targeted at local businesses and international markets is essential for developing the San Antonio community as a top international export market. FTA will continue to develop and implement the inSA business branding and marketing campaign to establish San Antonio as an important international market for exports. In addition, FTA will:

- » Implement marketing programs targeted at local businesses to build recognition of the impact exporting can have on business growth, and highlight local industries, companies and products to familiarize the business community with the region's exporting accomplishments.
- » Establish an international business website to consolidate and coordinate export technical assistance services and enhance global engagement among local businesses.
- » Develop, implement, and undertake marketing programs targeted at international audiences to reinforce the value of San Antonio's location within the NAFTA and the benefits our location provide for two way trade.
- » Support and complement the City of San Antonio's Convention and Visitors Bureau initiatives to attract new international conventions and meetings in order to raise awareness about the City's strengths and goals in international business circles.
- » Utilize social media and online content to grow familiarity with the San Antonio region and important foreign markets.



# Acknowledgments

The San Antonio Export Strategy Working Group would like to thank the City of San Antonio Economic Development Department for their leadership and management of the Export Strategy. In addition, the Working Group would like to thank the Global Advisory Committee whose leadership, insight, and support made the Export Strategy possible.

The San Antonio Export Strategy Working Group would like to thank the Brookings-Rockefeller Project on State and Metropolitan Innovation for support of this work. The research and best practices provided through the Metro Export Exchange, organized and guided by the leadership of Brookings, were instrumental in the development of our plan. The Working Group also thanks Brad McDearman and Amy Liu, whose "Ten Steps to Delivering a Successful Metro Export Plan" provided further guidance. Finally, we also thank the leadership from the four pilot metros and seven cohort metros as well as the International Trade Administration and Census Bureau who convened in support of the Metropolitan Export Exchange.

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[www.brookings.edu/metro](http://www.brookings.edu/metro)

## Brookings Institution Metropolitan Export Initiative Communities

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Columbus, Ohio  
Des Moines, Iowa  
Los Angeles, California  
Louisville-Lexington, Kentucky  
Minneapolis-St. Paul, Minnesota  
Portland, Oregon  
San Antonio, Texas  
San Diego, California  
Syracuse, New York  
Tampa Bay, Florida

## Export Data

Data used for the Exports Strategy is based upon the Brookings Institution's Export Nation 2010 Database.

## The San Antonio Export Strategy Working Group

### Working Group Chair:

Raul Rodríguez-Barocio  
Tom Benson Chair in  
Banking and Finance  
University of the Incarnate Word

### Program Manager:

James Henderson  
Economic Development Manager  
City of San Antonio

### Program Assistant:

Jesse R. Canedo  
Senior Specialist  
City of San Antonio

## Working Group Members

### Reynaldo Cano

Economic Development Manager  
City of San Antonio

### Rene Dominguez

Director of Economic Development  
City of San Antonio

### David Marquez

Director of Economic Development  
Bexar County

### José E. Martinez

Interim President & CEO  
Free Trade Alliance of San Antonio

### Misty Mayo

Executive Vice President of Business  
Retention & Expansion, San Antonio  
Economic Development Foundation

### Robert McKinley

Associate Vice President for Economic  
Development & Director, UTSA  
Institute for Economic Development

### Amir Mirabi

Director, Texas Small Business & Exports  
Office of the Governor, State of Texas

### Daniel Rodriguez

Director, U.S. Export Assistance Center U.S.  
Commercial Service, San Antonio Office

### Raul Rodriguez

Foreign Investment Specialist Free  
Trade Alliance of San Antonio

### Doug Smith

Assistant Director  
International Trade Center - UTSA

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