



Florida Chamber Global Florida Webinar



Agenda

Global Florida: Trade Topics and Trends

- I. Welcome | **Alice Ancona**, Director, Global Outreach, Florida Chamber of Commerce
- II. Guest Speakers:
 - **Inmaculada Gutierrez**, Trade Commissioner of Spain
 - **Juan Carlos Pereira**, Extenda
 - **Jose Luis Briceño**, Trade Commission of Spain in Chicago
 - **Manny Mencia**, Senior Vice President of International Trade & Business Development, Enterprise Florida
- IV. Audience comments
- V. Adjourn



Trade Commission of Spain



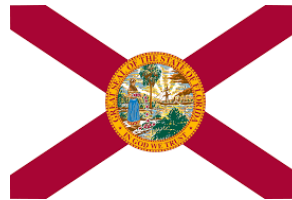
- **Inmaculada Gutierrez,**
Trade Commissioner of
Spain

SPAIN

11/01/2016

Washington

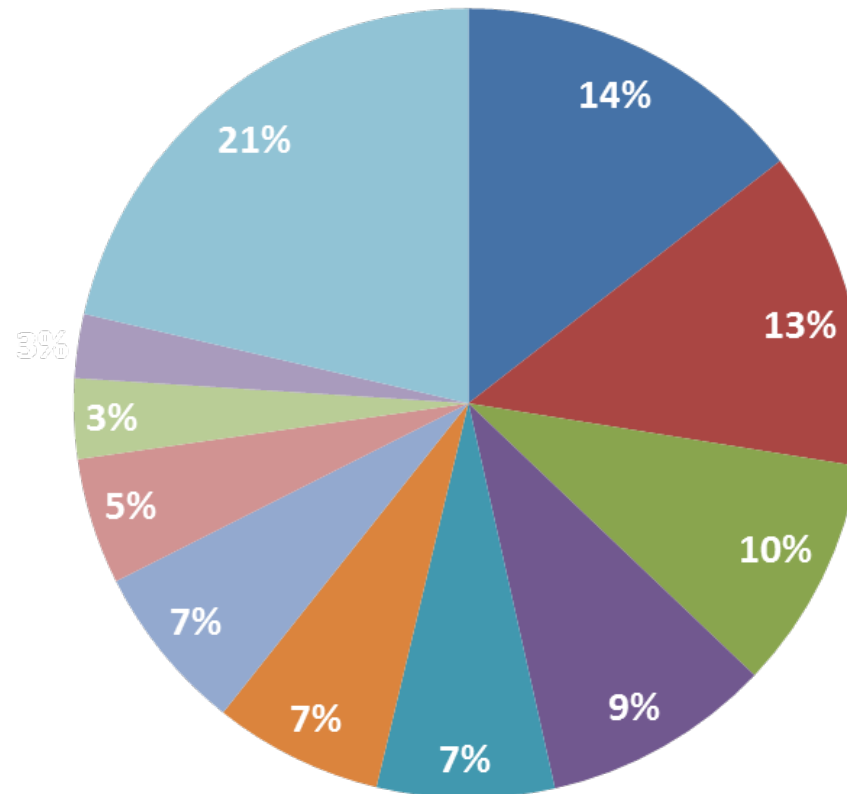
Quick Overview...



Size	65,755 mi ²	195,364 mi ²	3.797 m mi ²
GDP	\$835.6 billion	\$1.2 trillion	\$18.561 trillion
GDP per cápita	\$38,690	\$30,587	\$45,637
Population	19.893.297	47.129.783	318.9 million
Active Population	9.641.312	22.954.600	158.466.000
Employment	9.096.744	17.454.800	143.888.000

TOP 10 FLORIDA EXPORTS TO SPAIN

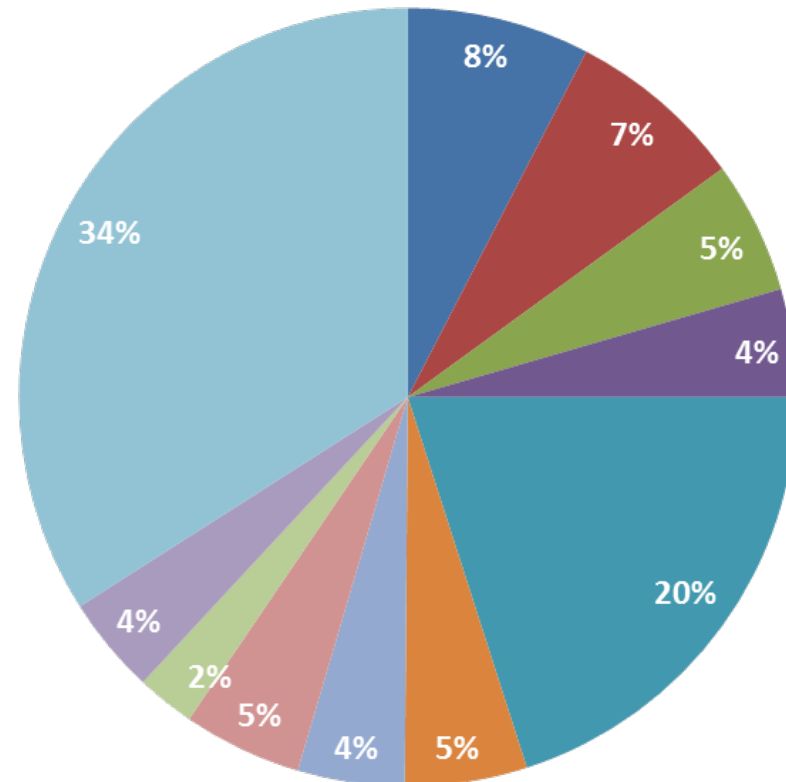
- 90 Optic, Photo Etc, Medic Or Surgical Instruments Etc
- 89 Ships, Boats And Floating Structures
- 88 Aircraft, Spacecraft, And Parts Thereof
- 97 Works Of Art, Collectors' Pieces And Antiques
- 85 Electric Machinery Etc; Sound Equip; Tv Equip; Pts
- 84 Nuclear Reactors, Boilers, Machinery Etc.; Parts
- 29 Organic Chemicals
- 48 Paper & Paperboard & Articles (inc Papr Pulp Artl)
- 33 Essential Oils Etc; Perfumery, Cosmetic Etc Preps
- 47 Wood Pulp Etc; Recovd (waste & Scrap) ppr & pprbd



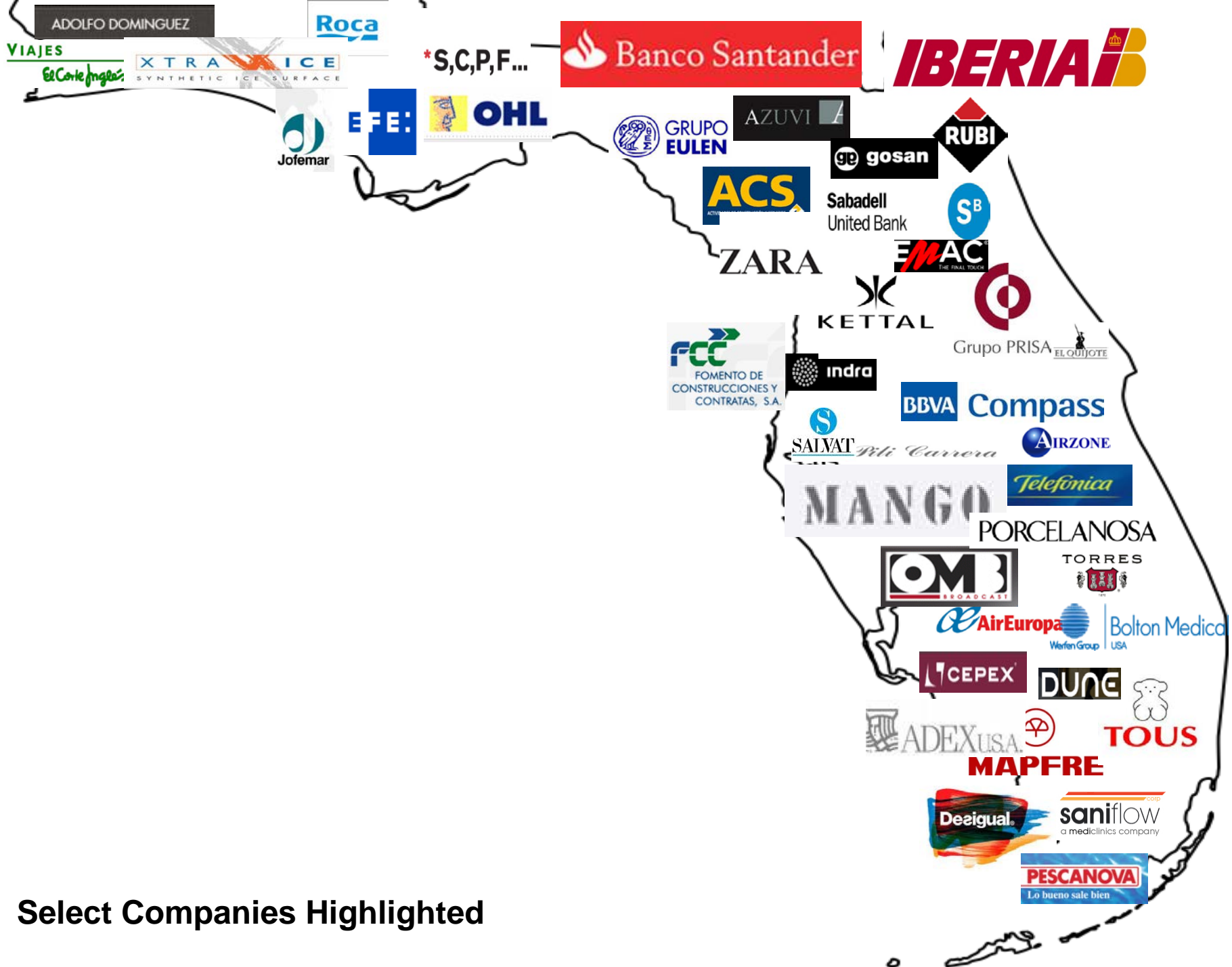
20% growth in Optic, Medical, Surgical Instruments; **914%** in Works Of Art, Collectors' Pieces And Antiques; **42%** growth in Electric Machinery Etc; Sound Equip; Tv Equip; Pts

TOP 10 FLORIDA IMPORTS FROM SPAIN

- 33 Essential Oils Etc; Perfumery, Cosmetic Etc Preps
- 64 Footwear, Gaiters Etc. And Parts Thereof
- 87 Vehicles, Except Railway Or Tramway, And Parts Etc
- 69 Ceramic Products
- 27 Mineral Fuel, Oil Etc.; Bitumin Subst; Mineral Wax
- 84 Nuclear Reactors, Boilers, Machinery Etc.; Parts
- 22 Beverages, Spirits And Vinegar
- 90 Optic, Photo Etc, Medic Or Surgical Instrments Etc
- 15 Animal Or Vegetable Fats, Oils Etc. & Waxes
- 85 Electric Machinery Etc; Sound Equip; Tv Equip; Pts

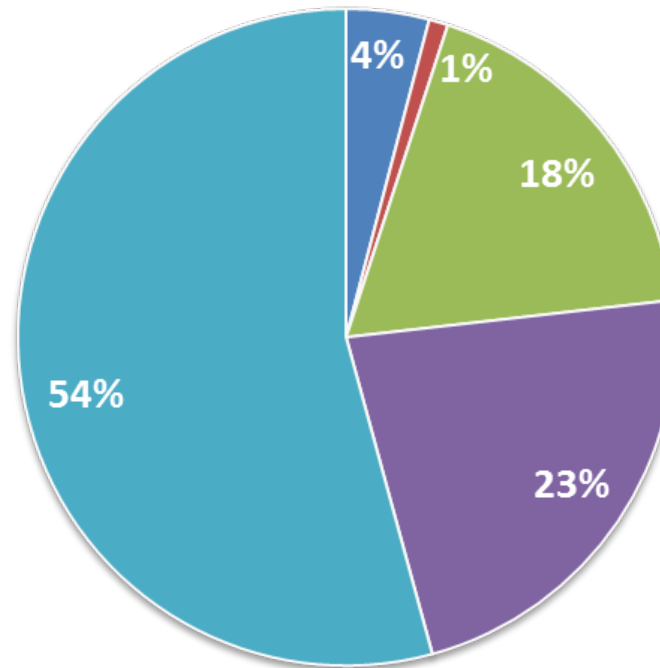


800% growth in Vehicles, Except Railway Or Tramway, And Parts Etc, **26%** in Ceramic Products, **111%** in Mineral Fuel, Oil Etc.; Bitumin Subst; Mineral Wax; **266%** Pharmaceutical Products; **357%** 07 Edible Vegetables & Certain Roots & Tubers



Select Companies Highlighted

Spanish Companies in Florida



■ 1-FOODS ■ 2 - BEVERAGES ■ 3 - CONSUMER GOODS ■ 4-INDUSTRIAL AND TECHNOLOGY PRODUCTS ■ 5-SERVICES

Over 400 Spanish companies have a presence in Florida

WHY SPAIN?

1. Business platform
2. First quality and cost efficient transportation
3. Business climate: open economy
4. Macroeconomic stability
5. Access to highly competitive inputs
6. Business opportunities

WHY SPAIN?

1. Business platform: EU

Domestic market of over 46 million consumers: Spain has a GDP per capita (PPP) above the EU-27 average.

Spain grants free access to one of the world's largest markets, the European Union: more than 500 million consumers

Advantages of operating in the EU:

- **Intra-European duty-free market.**
- **Free movement of goods and services, capital and persons.**
- **Single currency: EURO.**



WHY SPAIN?

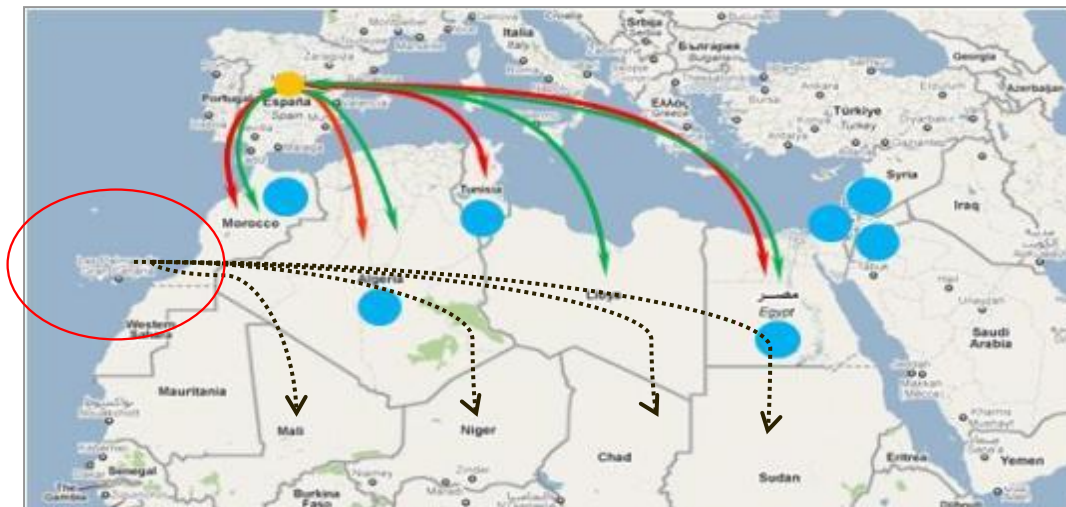
1. Business platform: Africa and the Middle East

Spain is a suitable platform within the European market for doing business with North- African, Mediterranean, and Middle East countries:

Euro-Mediterranean Association Agreements with Egypt, Israel, Jordan, Lebanon, Morocco, Tunisia and Algeria for the gradual liberalization of trade in the Mediterranean area.

• **19 Agreements to Avoid Double Taxation:** Albania, Algeria, Bosnia and Herzegovina, Croatia, Cyprus, Egypt, France, Greece, Israel, Italy, Kuwait, Malta, Morocco, Montenegro, Saudi Arabia, Slovenia, Tunisia, Turkey, United Arab Emirates.

• **15 Agreements for Protection And Promotion of Reciprocal Investments:** Albania, Algeria, BosniaHerzegovina, Croatia, Egypt, Jordan, Kuwait, Lebanon, Libya, Montenegro, Morocco, Slovenia, Syria, Tunisia, Turkey.



WHY SPAIN?

1. Business platform : LA

The best European platform for doing business with Latin America:

17 Agreements to Avoid Double Taxation in Central and South America:

Argentina, Bolivia, Brazil, Barbados, Chile, Colombia, Costa Rica, Cuba, Dominican Republic, El Salvador, Ecuador, Mexico, Panama, Jamaica, Trinidad & Tobago, Uruguay, Venezuela.

20 Agreements for Protection and Promotion of Reciprocal Investments

Bolivia, Colombia, Costa Rica, Cuba, Chile, Ecuador, El Salvador, Guatemala, Honduras, Jamaica, Mexico, Nicaragua, Panama, Paraguay, Peru, Dominican Republic, Trinidad & Tobago, Uruguay, Venezuela and Argentina.



WHY SPAIN?

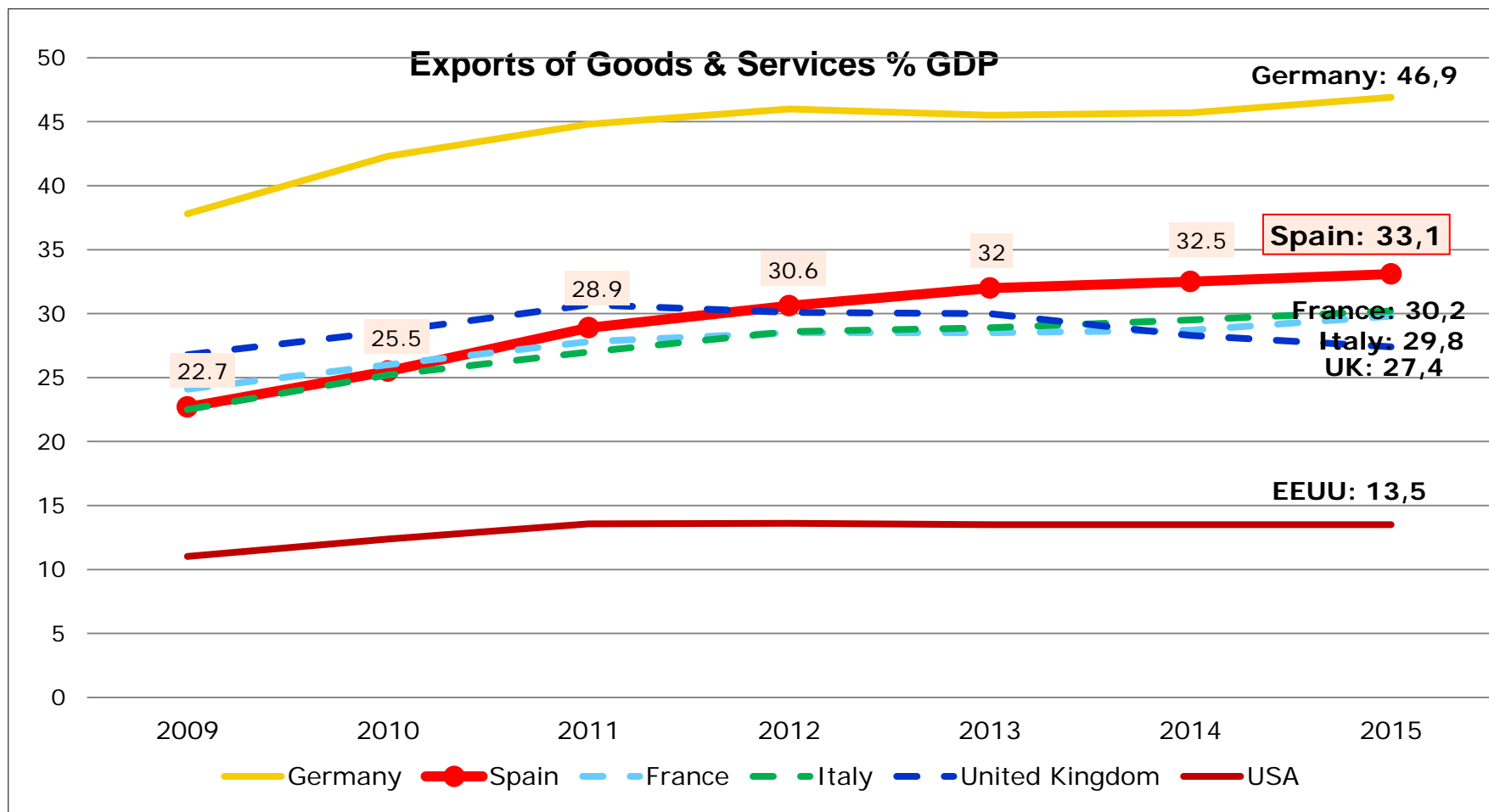
2. Excellent and cost-efficient transportation

- 250 airlines have scheduled flights, operating out of the country's 47 airports.
- According to The Global Competitiveness Report (World Economic Forum), Spain has one of the best indexes of rail road infrastructure.
- Spain has the largest EU highway network.
- Excellent maritime connections, with 46 state-own ports on both the Atlantic and the Mediterranean coasts (Huelva, Cádiz, Algeciras, Málaga...).

WHY SPAIN?

3. Business Climate: Open Economy

An open Economy is a more Competitive Economy



WHY SPAIN?

Inward FDI stock (USD Millions)			
Economy		Inward FDI stock 2014	
		Mill USD	Share
1	United States	5,409,884	20.8%
2	United Kingdom	1,662,858	6.4%
3	Hong Kong, China	1,549,849	6.0%
4	China	1,085,293	4.2%
5	Singapore	912,355	3.5%
6	Brazil	754,769	2.9%
7	Germany	743,512	2.9%
8	France	729,147	2.8%
9	Spain	721,879	2.8%
10	Switzerland	681,849	2.6%
11	Netherlands	664,442	2.6%
12	Canada	631,316	2.4%
13	Australia	564,608	2.2%
14	Belgium	525,612	2.0%
15	Russian Federation	378,543	1.5%
16	Italy	373,738	1.4%
17	Ireland	369,168	1.4%
18	Mexico	337,974	1.3%
19	Sweden	321,103	1.2%
20	Indonesia	253,082	1.0%
World		26,038,824	

Source: UNCTAD, WIR, 2015.

Outward FDI stock (USD Millions)			
Economy		Outward FDI stock 2014	
		Mill USD	Share
1	United States	6,318,640	24.4%
2	United Kingdom	1,584,147	6.1%
3	Germany	1,583,279	6.1%
4	Hong Kong	1,459,947	5.6%
5	France	1,279,089	4.9%
6	Japan	1,193,137	4.6%
7	Switzerland	1,130,615	4.4%
8	Netherlands	985,256	3.8%
9	China	729,585	2.8%
10	Canada	714,555	2.8%
11	Spain	673,989	2.6%
12	Ireland	628,026	2.4%
13	Singapore	576,396	2.2%
14	Italy	548,416	2.1%
15	Belgium	450,178	1.7%
16	Australia	443,519	1.7%
17	Russian F.	431,865	1.7%
18	Sweden	379,528	1.5%
19	Brazil	316,339	1.2%
20	Taiwan	258,829	1.0%
World		25,874,757	

Source: UNCTAD, WIR, 2015.

WHY SPAIN?

3. Business Climate: Open Economy

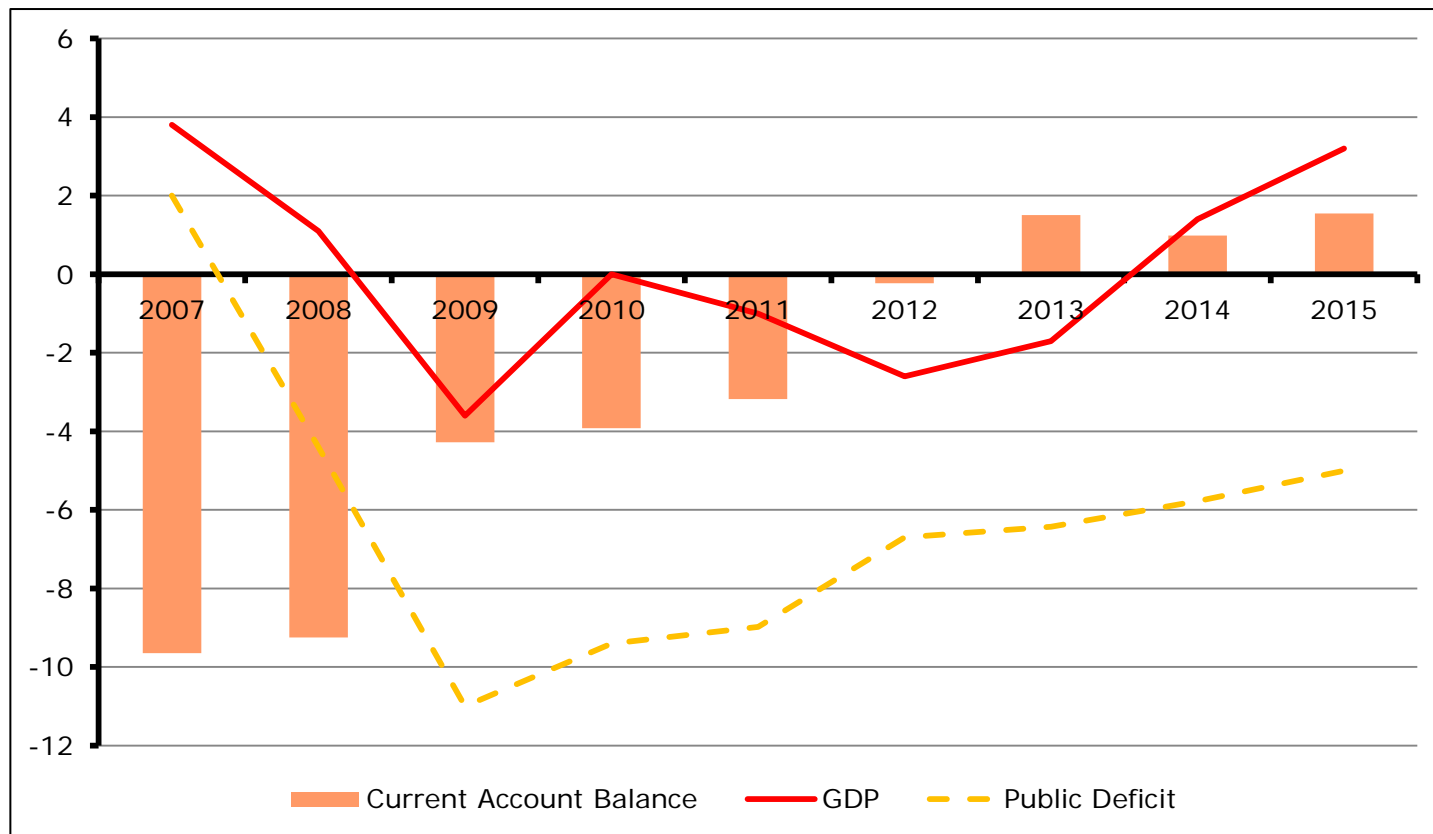
Greenfield Projects in Spain by Sector 2003 - 2015. Million USD. FDI Markets						
		Capex	Projects	Jobs Created	Companies	% total
1	Automotive OEM & Automotive Components	27.921,1	200	54.792	101	15,4%
2	Consumer Products, Food, Textiles & Beverages	26.583,0	1.405	157.332	571	14,7%
3	Energy, Environment & Renewable Energy	23.646,4	161	9.891	105	13,1%
4	ITC: Communications, Software & IT Services	22.460,3	693	42.384	524	12,4%
5	Real Estate, Building & Construction Materials	15.663,5	170	107.239	98	8,7%
6	Transportation & Non-Automotive Transport OEM	12.824,7	292	24.541	157	7,1%
7	Business & Financial Services	11.654,6	707	23.990	490	6,4%
8	Logistics & Warehousing	9.037,8	51	10.657	42	5,0%
9	Chemicals, Plastics & Rubber	8.896,0	237	11.877	162	4,9%
10	Consumer Electronics, Business Machines & Equipment, Components & Semiconductors	5.509,1	290	23.092	183	3,0%
11	Pharmaceuticals, Medical, Healthcare & Biotechnology	4.225,0	171	12.017	130	2,3%
12	Metals	3.354,5	96	6.472	69	1,9%
13	Hotels & Tourism	2.826,9	73	5.146	44	1,6%
14	Industrial Machinery, Equipment, Engines & Turbines	1.697,5	165	11.344	134	0,9%
15	Leisure & Entertainment	1.467,4	20	4.247	19	0,8%
16	Aerospace, Space & Defence	1.056,1	30	2.824	25	0,6%
17	Others	2.213,4	61	4.345	43	1,2%
	TOTAL	181.037	4.822	512.190	2.782	100%

Source: FDI Markets, 2016. USD million.

WHY SPAIN?

4. Macroeconomic Stability

GDP-Public Deficit-Current Account Balance (%)



Source: Ministry of Economy and Competitiveness y BdE 2016. GDP: Annual rate of change (%) Public Deficit & Current Account Balance: % GDP

WHY SPAIN?

4. Macroeconomic Stability

	Period 2014-2019					
Percentage Change	2014	2015	2016	2017	2018	2019
Real GDP	1.4	3.2	2.9	2.3	2.5	2.5
Private Consumption	1.2	3.1	3.3	2.6	2.4	2.4
General Government Consumption	0.0	2.7	1.0	0.9	0.7	0.7
Gross Fixed Capital Formation	3.5	6.4	5.4	4.2	4.7	4.8
Capital Goods and Others	10.5	10.2	8.0	5.2	5.5	5.7
Construction	-0.2	5.3	4.3	3.9	4.8	4.8
Domestic Demand (*)	1.6	3.7	3.2	2.5	2.5	2.5
Exports of Goods and Services	5.1	5.4	5.4	5.7	5.6	5.7
Imports of Goods and Services	6.4	7.5	7.0	6.7	6.3	6.1
External Balance (*)	-0.2	-0.5	-0.3	-0.2	0.0	0.0

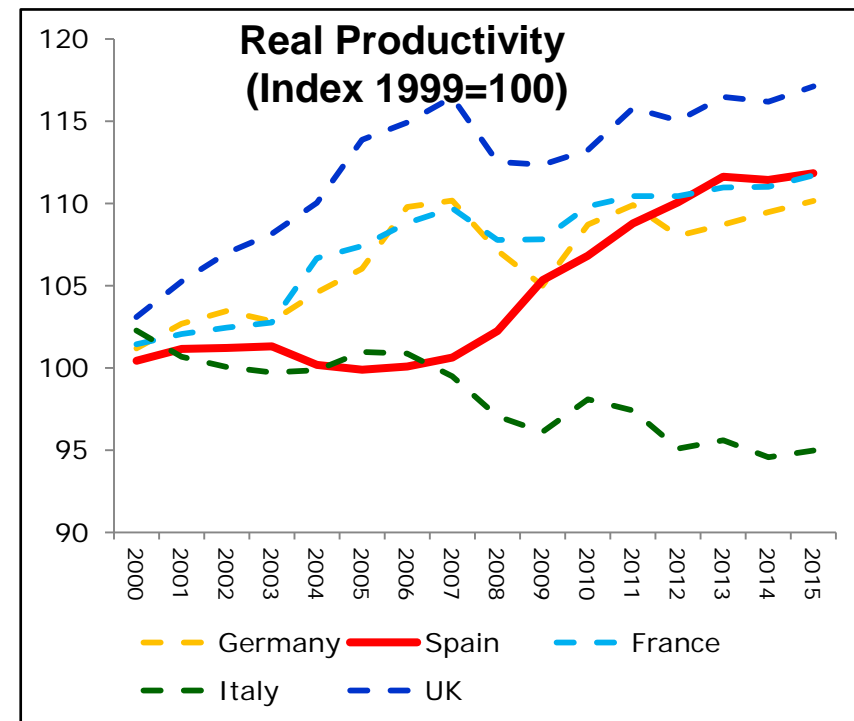
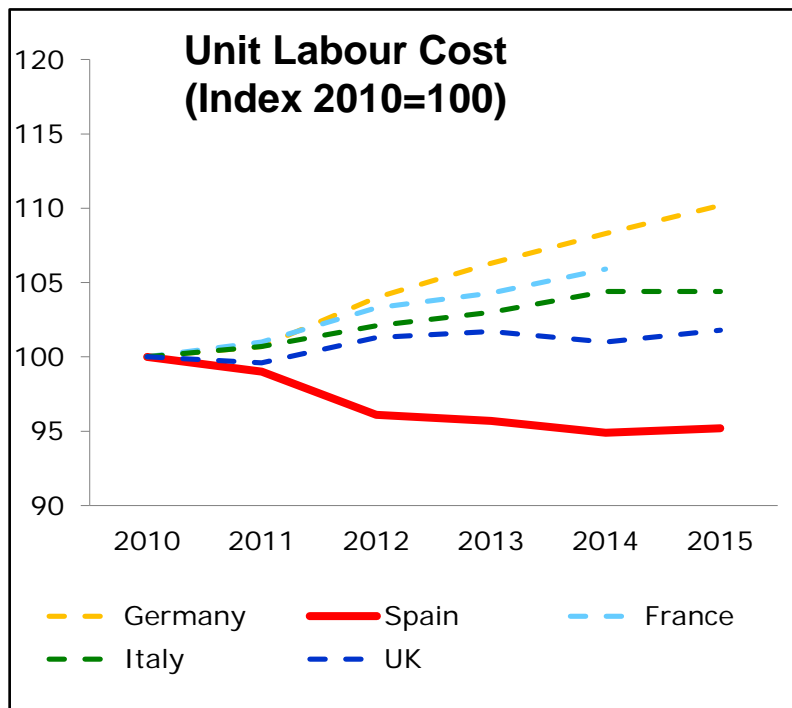
(*) Contribution to GDP Growth.

Source: INE and Ministry of Economy and Competitiveness 29th July 2016

WHY SPAIN?

5. Access to highly competitive inputs

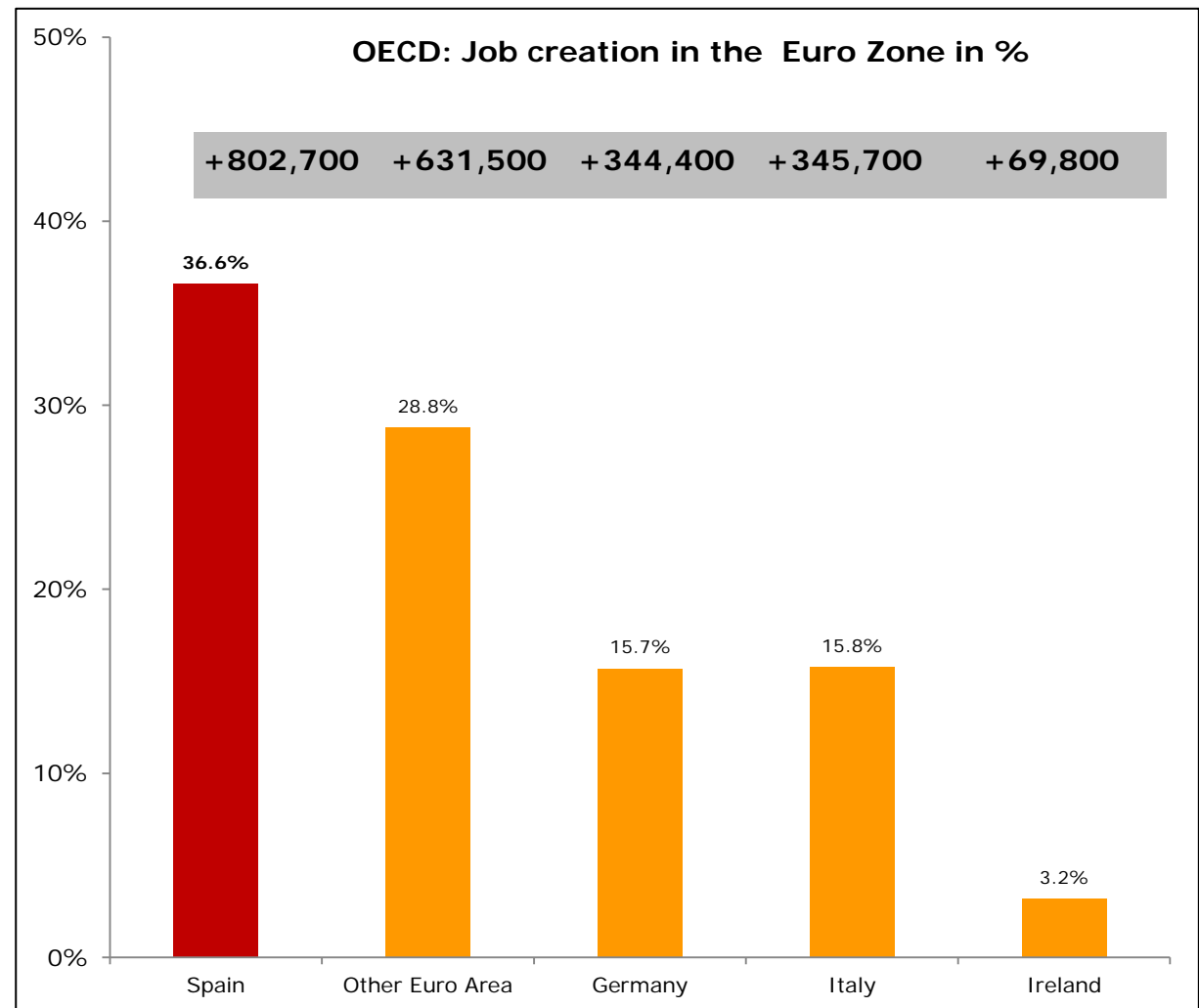
Labor costs in Spain are below the EU-27 average...
... and productivity is better.



WHY SPAIN?

5. Access to highly competitive inputs

Spain has generated 36.6% of all the employment created in the Euro Area since 2014



Source: OECD

WHY SPAIN?

6. Business opportunities



**Biotechnology
& Pharma**



Industry 4.0



ICT & Digital



**Real Estate
& Tourism**



Aerospace



Automotive



**Logistic
& Transport**



Agrofood



Chemicals

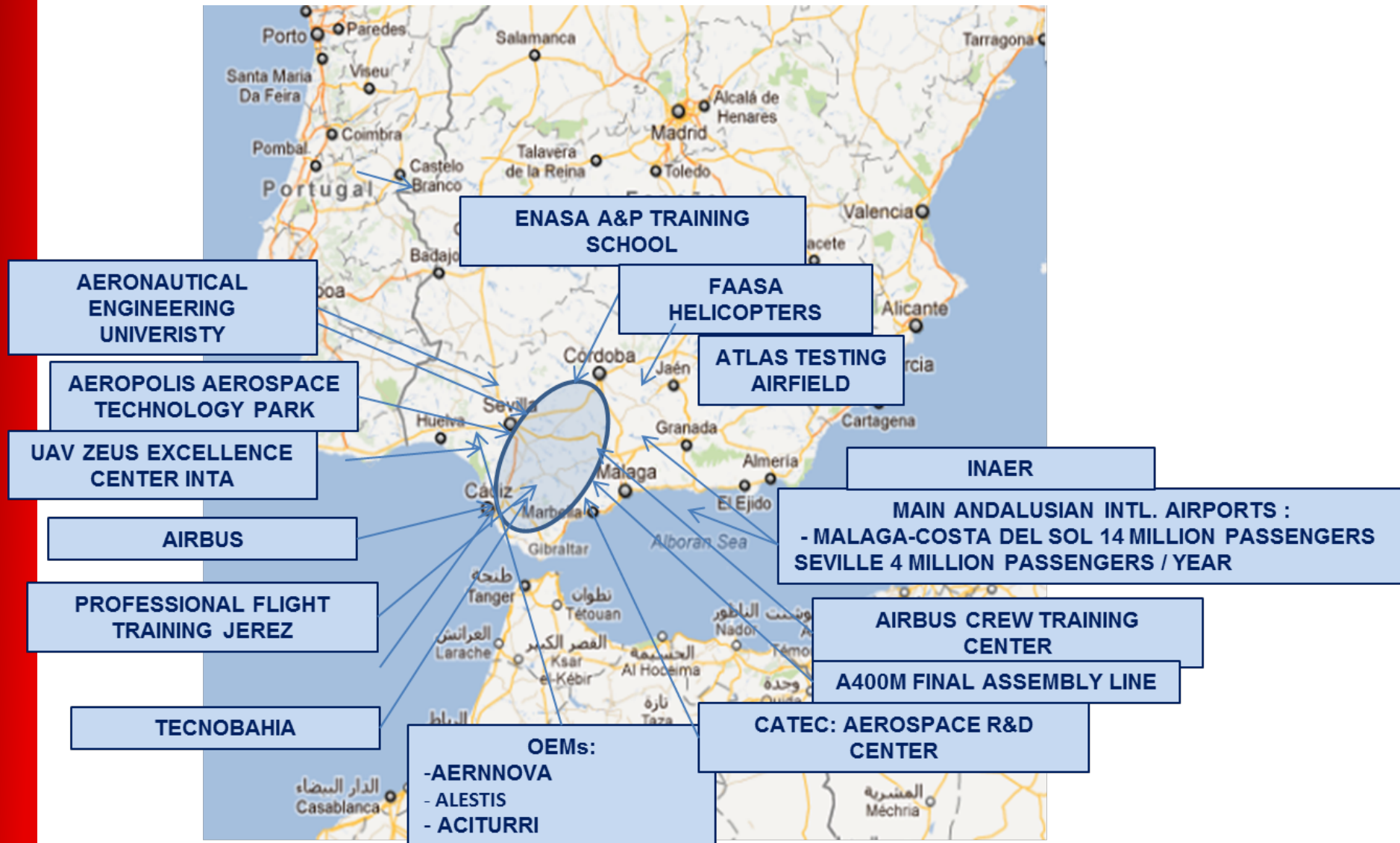


**Environment
& water treatment**

WHY SPAIN?: AEROSPACE



A PRIVILEGED GLOBAL LOCATION: EASY ACCESS TO EUROPE AND AFRICA



ANDALUSIA, SPAIN: THE A&D HUB OF SOUTHERN EUROPE



AEROSPACE INDUSTRY IN ANDALUSIA : OVERVIEW

- Andalusia is the second largest aerospace region in Spain representing near 30% of the country's sector turnover.
- Around 150 companies operate in the aeronautical sector in the region, accounting for over 13,740 direct jobs.
- Since 2005 Aerospace turnover in Andalusia grew by 220% and employment has risen by 120%
- In 2014, aerospace industry turnover in Andalusia was **\$2,344 Millions.**
- Andalusia has **5 Airports.**
- **2** of them International Airports
 - Malaga Airport has 15 million passengers per year. 4^o largest airport in Spain.
 - Seville Airport with 4.5 million



Source: Helice Foundation

ANDALUCÍA IS HOME TO MAJOR AIRCRAFT OEMs

EADS/ Airbus jointly employ over 2,600 people at 4 plants in Seville and Cadiz, focusing on the assembly and machining of a number of airplane models.

In addition, other major OEMs subcontract a number of **prestigious programs** in Andalucía.



- A400M
- A320
- A330/340
- A380
- A350
- A330 MRRT
- Boom



- EUROFIGHTER
- TYPHOON
- C212
- CN235
- C295



- B737
- B777
- B 787
- Bombardier
- CRJ700
- Embraer 145
- Embraer ERJ190

LARGE SUPPLIERS WITH STRONG PRESENCE IN ANDALUCÍA

The 150 aerospace companies in Andalucía include a number of large suppliers that provide OEMs with manufactured components such as aero structures, composite and metallic parts as well as with engineering and other services.



- Top level supplier to large aeronautical OEMs
- Full value chain offering completed solutions in complex aero structures, engines and tooling



- Tier one aerostructures supplier and a leader in engineering & composite materials manufacturing
- EADS CASA is one of the major stakeholders
- Contracts with Airbus and Embraer to manufacture passenger aircrafts



- Global aerostructures company assuming the integral management of large aircraft sections
- Provides engineering services, composite and metallic parts, as well as repair and product support services

Source: Aprean

A400M

Airbus Military has been assembling the following parts at its facility in Seville since 2009 :

- FAL including flight Test and Training Center
- Horizontal Stabilizer
- Vertical Stabilizer (selected parts)
- Elevator
- Engines Nacelles
- Flaps Fairings



EUROFIGHTER Typhoon

The following parts are build between different companies in Sevilla and EADS Casa Cadiz:

- Right hand wing
- Slats (for the whole fleet)
- Wing Fairings
- Landing Gear doors
- Dass Tip Pod
- Main Wing Subassemblies
- ASTA training center, operations and maintenance



THE RIGHT ENVIRONMENT FOR AEROSPACE R&D



Located in **Sevilla**, Aerópolis provides support and advanced services to the aviation and aerospace industry in Andalucía. It is an excellent site to develop R+D projects and to foster business cooperation within the aerospace industry.



The **Advanced Technology Aerospace Center** of Andalucía is located at Aerópolis and specializes in aerospace technology testing and R&D in 3 areas: structures and materials; electronics, avionics and systems and propulsion (engines and fuel).



Located in **Cadiz**, TecnoBahía is focused on the new materials industry with particular attention to its application in the aviation, naval and automotive industries.



ANDALUCÍA AT THE FOREFRONT OF THE UNMANNED AIRCRAFT SYSTEMS MARKET



Andalucía has **the first UAS Experimental Flight Center in Spain** and the third in Europe.

- Excellent climate and geographic conditions more than 300 days of operation.
- Reserved airspace (13,5x11,5 sq miles).
- 0,5 miles main runway (800 meters) for light UAVs



UAS Centre of Excellence

- Training and simulation facilities
- 190 hectares of terrain
- Control tower, offices and engineering hangar
- Main runway for heavy UAVs

AEROSPACE

& DEFENSE MEETINGS SEVILLA 2016



MATCHMAKING PROGRAM FOR THE AEROSPACE & DEFENSE INDUSTRY



SEVILLE - SPAIN
May 10-13, 2016



sevilla.bciaerospace.com

Organized by:



Platinum sponsor:



Gold sponsors:



A&DM (AEROSPACE & DEFENSE MEETINGS) SEVILLA

ICEX



SUMMIT

ONE-TO-ONE MEETINGS



© Extenda

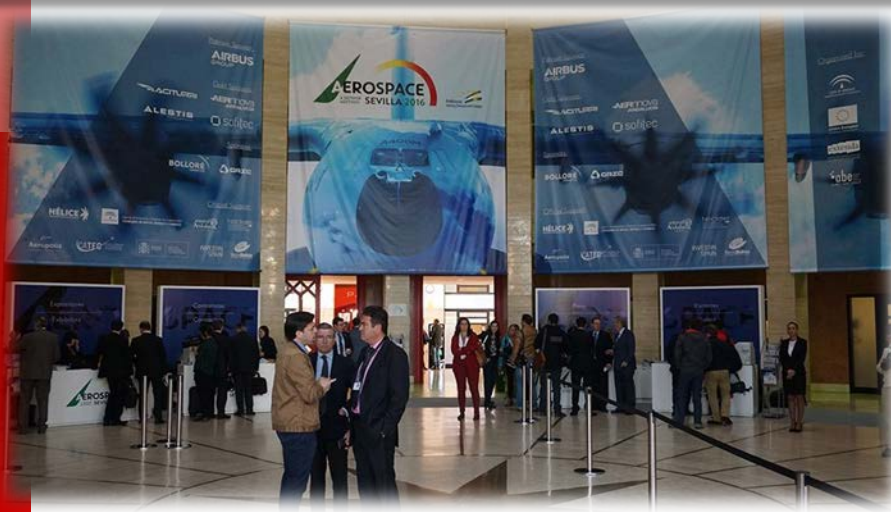


WORKSHOPS

A&DM (AEROSPACE & DEFENSE MEETINGS) SEVILLA



A&DM (AEROSPACE & DEFENSE MEETINGS) SEVILLA





Past edition was
MAY 10TH – 13TH 2016

next edition:

MAY 15TH – 18TH 2018

SEVILLE, SPAIN

<http://sevilla.bciaerospace.com>

BUSINESS OPPORTUNITIES TODAY

- AIR TRAFFIC MANAGEMENT (ATM) SYSTEMS
- SATELLITE APPLICATION DEVELOPMENT
- UNMANNED COMMERCIAL FLIGHTS (UAVs)
- MRO. Good potential synergies with Florida.

WHY SPAIN?



Investing in Life Sciences and Biotechnology

- **Solid Basic Science:** Good scientific output. Spain is 10th world scientific power and 5th by scientific production in the EU15.
- **Integrated Healthcare System:** Spain has an extensive network of university hospitals, both public and private, backed by leading-edge research centres. The system is ideal for translational medicine and discovering new drugs and advanced therapies.
- **Consolidation of biotechnology sector and an established pharmaceutical industry:** Biotechnology companies are growing faster here than in other countries and pharmaceutical industry is leader in R+D spending in Spain
- **Excellent infrastructure for innovation:** exponential growth of science and technology parks, research centres and institutes of technology. Spain's infrastructure also incorporates the latest technology for life sciences projects.
- **Highly qualified workforce:** There is a surplus of talent for competitive and innovative projects. In some areas of Spain the percentage of workers with post-graduate studies is higher than the European average.

WHY SPAIN?



Investing in Life Sciences and Biotechnology

BIO SPAIN 2018

- BIOSPAIN is the largest biotech event organized by a national bioindustry association in Europe and one of the largest in the world by the number of one-to-one meetings (+3.300) and companies participating (+850). 34% of our delegates came from outside of Spain.
- BIOSPAIN is organized by ASEBIO, the Spanish Bioindustry Association and each edition is co-organized by a local institution from the host city/region. On the 2016 edition, Biospain was co-organized by the Basque Government through the SPRI, the Basque Business Development Agency.

Participant Overview by Industry

Biotechnology.....	51%
Health.....	33%
Industrial.....	7%
Food.....	6%
Agriculture.....	5%
Research Institutions/Universities/Clusters.....	11%
Pharma.....	10%
Investors.....	8%
Professional services & consulting.....	8%
Media.....	5%
Medical Technology.....	2%
Suppliers & Engineering.....	3%

Top countries represented at BIOSPAIN

Spain
United Kingdom
France
Portugal
United States
Colombia
Mexico
Switzerland

WHY SPAIN?



Investing in ICT: (Information & Communication Technologies)

Spain is a leader in **advanced technologies**:

- **Spanish landing software** is renowned and used worldwide
- **Major events**/Complex, distributed international delivery
- **Hi-Tech** and **Defence** Industry
- **Telecommunications, Utilities, Energy, Banking...**

There are more than **30,000 ICT companies**, including digital content, operating in Spain. The sector is currently ¹ employing more than **425,000 workers**

- **Mobile World Congress** in Barcelona World's Mobile Capital



abertis



indra

amadeus

PANDA
SECURITY



¡Gracias! Thank you!



GOBIERNO
DE ESPAÑA

MINISTERIO
DE ECONOMÍA
Y COMPETITIVIDAD

¡CEX España
Exportación
e Inversiones

Trade Commission of Spain
miami@comercio.mineco.es
(305) 446 - 4387

Enterprise Florida



Manny Mencia, Sr. VP of International Trade & Business Development, Enterprise Florida

WHY SPAIN?



**WORLD MOBILE
CONGRESS
BARCELONA, SPAIN
FEBRUARY 27 –
MARCH 2, 2017**

NEARLY
101,000
ATTENDEES
FROM
204
COUNTRIES

55%+
of this year's MWC
attendees hold
senior-level positions

5,000
CEOs participated

374
Speakers from
278 companies

Notable speakers

Shang Bing, China Mobile
Mark Zuckerberg, Facebook
Bill Ruh, GE
Dawn Airey, Getty Images
Anthony Lake, UNICEF

2,200+
EXHIBITORS

110,000 net sqm of exhibition & hospitality space

Operator companies
400+
Operator attendees
10,000+

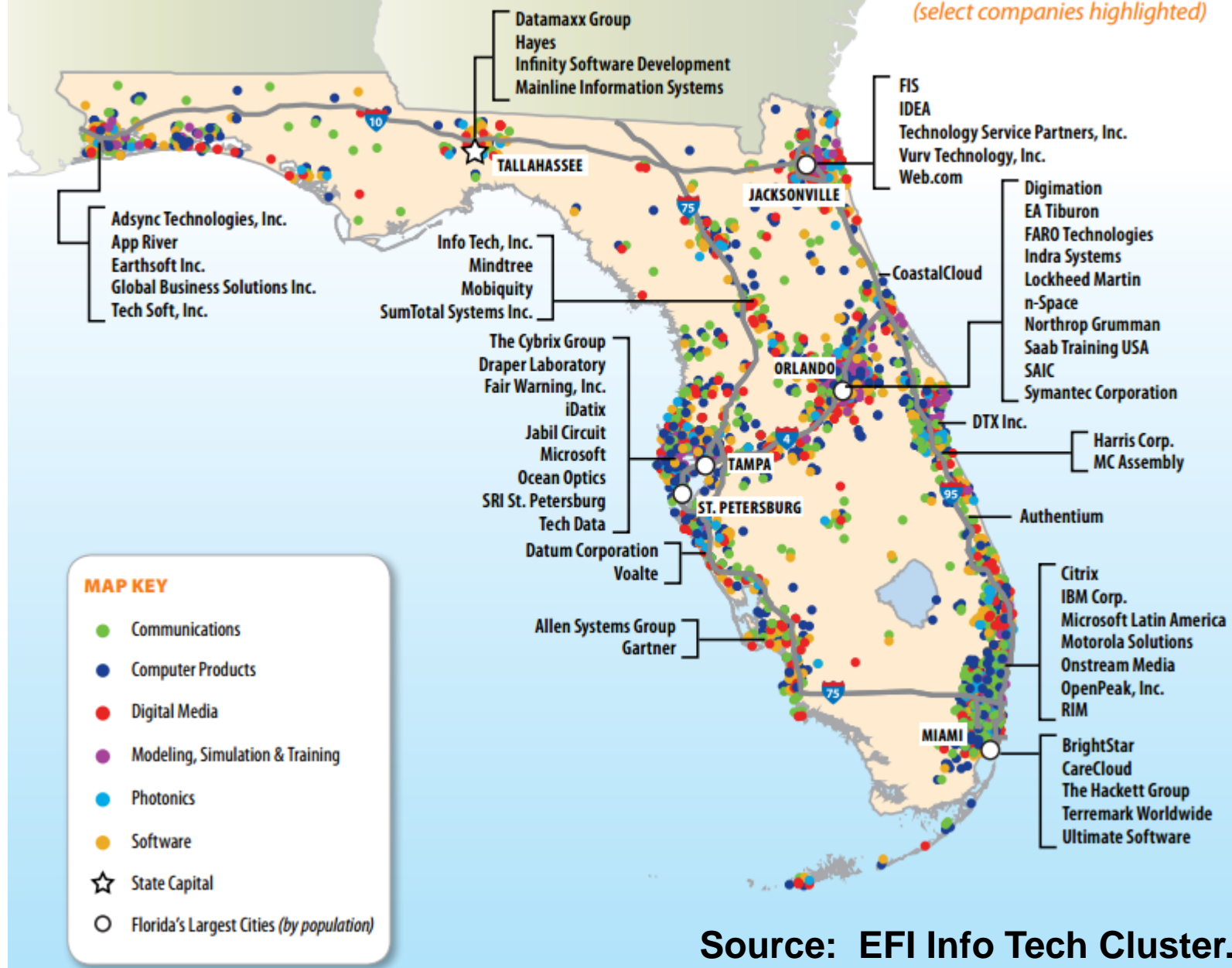
3,600+
International media
and industry analysts

The largest certified
carbon neutral trade show,
per the Guinness Book of
World Records.
(2016 Carbon Neutrality
certification pending)

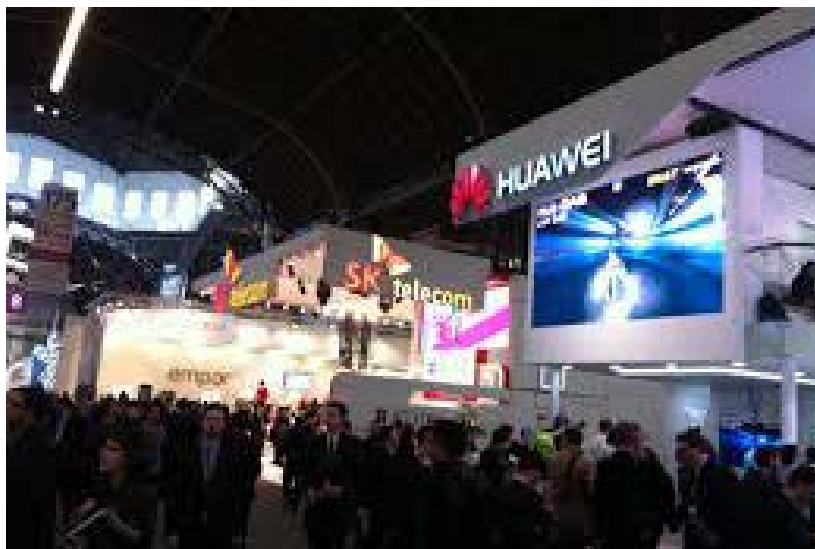
#MWC16

Florida's Infotech Cluster

(select companies highlighted)



Source: EFI Info Tech Cluster.



Q&A



SAVE THE DATE

Major Conferences

February 14-15, 2017- International Days

Tallahassee, FL

- International Business Council and Trade & Logistics Institute Meeting
- International Lobby Days

Florida Trade and Logistics Institute

December 5, 2016- Miami Trade and Logistics Meeting

Miami, FL (precedes Transportation Summit)

Global Florida Webinars

First Tuesday of the Month from 3:00-4:00 PM

- Next Webinar: February 7th

www.flchamber.com/international





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Join the Discussion, Be A Part of The Solution



INTERNATIONAL BUSINESS COUNCIL

Florida Chamber of Commerce



FLORIDA TRADE & LOGISTICS INSTITUTE

Florida Chamber of Commerce



GLOBAL FLORIDA

Florida Chamber of Commerce



INTERNATIONAL DAYS

Florida Chamber of Commerce

GLOBAL FLORIDA ■
Florida Chamber of Commerce

