With the largest network of overseas offices of any state in the U.S., Pennsylvania’s Office of International Business Development (OIBD) is committed to supporting Pennsylvania companies by working with them to increase their export sales and encouraging foreign companies to invest in Pennsylvania.
Pennsylvania’s Assets

- **Stable Economy**
  Large, growing and diverse economy
- **Comprehensive Infrastructure**
  Transportation, water resource, energy
- **Strategic Location**
  Central to U.S and Canadian businesses and consumers
- **Modern Workforce**
  Well-educated, highly skilled
- **Diversified Industries**
  Highly diversified with a strong manufacturing base
- **World-class Education**
  Hundreds of world-class institutions of higher education
- **Game-changing Resources**
  Supply and demand, Marcellus Shale, manufacturing
We are the 22nd Largest Economy in the World
Pennsylvania’s Gross State Product - USD $603.87 billion

Larger than:
- Sweden $525b
- Norway $499b
- Poland $489b

Source: World Development Indicators Database, World Bank, Sept 2014
50 Indian-Owned companies in Pennsylvania
Providing 1,376 jobs – 24% are Manufacturers

India ranks 17th for the total number of firms in PA
Major Multi Nationals in Pennsylvania

- GlaxoSmithKline
- SAP
- Saint-Gobain
- Areva
- Sanofi Aventis
- Nestlé
- Hyundai
- Rotem
- Gamesa
- Lafarge
- Bayer
- Bombardier
- Toshiba
- Mitsubishi Electric Power Products, Inc.
- Osram Sylvania
- Siemens
- ABB
- Schering
Indian Companies Growing in PA

There are 50 Indian companies – both large firms and growing tech firms in PA, employing more than 1,100 people.

- Tata Steel, Arcelor-Mittal
- Chambai Fertilisers and Chemicals
- Genpact (back office support)
- Unilog (ecommerce solutions)
- Caliber Technologies (software for life sciences industry)
Recent Successful Indian Projects to PA

- Denali Group
  - Expanding Procurement’s Value.
- Wipro
  - Applying Thought
- Unilog
- Technosoft Engineering
  - Innovation • Reliability • Flexibility
Indian Investment into PA

**Wipro**

Project Requirements:
Facility near Volvo Construction

Result: Wipro established their manufacturing facility in Chambersburg, creating 74 jobs and investing over $9.7 million into PA.

**Denali**

Project Requirements:
Manufacturing space for expansion near current Pittsburgh facility

Result: Denali expanded their presence in Pennsylvania in the Pittsburgh region by relocating to a new facility, creating 55 new jobs, retaining 21 existing jobs and investing over $9.3 million into PA.
Pennsylvania: A Global Economy

Nearly $81 billion
2012 Imports

Top Imports Include:
Crude oil
Cellular phones
Medicaments
Coffee
Airplane and helicopter parts
Footwear
Women’s trousers

Top 10 states in the U.S. for Exports

Nearly $39 billion
2012 Exports

Major Imports from:
India
China
Canada
Nigeria
Germany
Israel

Source: U.S. Census Bureau

Top Exports Include:
Nucleic acids
Civilian aircraft
Vaccines
Motorcycles
Diesel locomotives
Articles of plastic
Strategic Location

In Pennsylvania, it’s easy and convenient to reach both in-country customers as well as those abroad.

- 3 major ports
- 250,000 lane miles of highways
- 6 international airports
- 5,600 miles of rail lines
Transportation and Infrastructure

Strategic Access to U.S. Markets

A keystone to U.S. markets, Pennsylvania is located within 500 miles of 40 percent of the U.S. population and purchasing power, including six of the 10 largest markets and 60 percent of Canada’s population.

Convenient Location

Between the financial markets of New York City and the regulation hub of Washington D.C.
Leading the Way to Energy Independence

- Home to the 2nd largest energy field in the world
- 2nd in the U.S. for electricity generation
- 2nd in the U.S for natural gas production
- 4th in the U.S. for energy production
- Domestically produced energy is leading to more affordable energy bill for all PA consumers
Infrastructure - Water Resources

- 86,000 miles of streams and rivers
- 120 miles of shoreline
- Nearly 4,000 lakes, ponds and reservoirs

*In Pennsylvania, groundwater is about 30x more abundant than all surface water combined.*
Leading the Way to Energy Independence

2nd in the nation for electricity generation

2nd in the nation for natural gas production

4th in the nation in energy production

2nd in the nation for nuclear generation

9th in the nation for total solar capacity

15th in the nation in total wind capacity installed

4th in the nation for coal production

19th in the nation for crude oil production

*Home to the 2nd largest energy field in the world*
Infrastructure – Energy Resources

Domestically produced energy is leading to more affordable energy bills for all Pennsylvania consumers.

- Wholesale electricity reduced 40% in the past five years
- Gas rates down 50%
- A reliable electric grid free of disruptions
- Dependable and affordable public transportation
- Cost-effective shipping and transportation of goods
Shale Gas & the Plastics Industry

- PA is the 10th largest chemical producing state
- Ships $7.8 billion in products around the world
- PA’s 4th largest manufacturing industry is the Chemicals industry
- 57% higher average manufacturing wage of $88,660
- Generates $3.7 billion in payroll annually
- Provides more than 126,400 jobs both directly & indirectly
- Invests $943 million to build & update equipment & facilities
- Generates $1.04 billion in state, local & federal taxes
Marcellus and Utica Shale Gas

With the 2nd largest energy field in the world, Pennsylvania is on the verge of a new industrial revolution.

- Pennsylvania ranked 4th in shale industry economic contribution for 2010
- 17.5 billion cubic feet of natural gas produced per day
- Plastics and rubber products are directly linked to the natural gas industry. Pennsylvania ranks 5th in the country for both plastics shipment and in value added to the plastics industry

**IMPACT MEASURES**

- **793 billion cubic feet**
  Pennsylvania Marcellus Shale production in first half of 2012

- **$633 million**
  Amount Pennsylvania consumers saved during 2010

- **Nearly 1:2**
  Return on investment for every $1 invested by Marcellus Shale producers

- **In 2010**
  $11.2 billion increase in economic activity and 140,000 jobs supported
A World-Class Workforce

- More than 40% of Pennsylvanians between the ages of 25 and 34 have college degrees
- PA ranks in the top 10 in the number of adults with college degrees employed in high-level occupations
- The State ranks 10th in the number of postsecondary degrees awarded
- The commonwealth is first in the U.S. in terms of net migration of students into the state for postsecondary education
- Each year, Pennsylvania’s world-class colleges and universities attract more than 60,000 students from across the U.S. and around the world
Advanced Manufacturing & Materials

Supportive Business Climate
- Broad-based business tax reforms
- State agency regulatory reforms
- $55 million R&D Tax Credit
- Growing skilled talent & job matching
- Tools to accelerate innovation

Major sectors include:
- Transportation
- Metal machining and fabrication
- Pharmaceuticals
- Chemicals and plastics

Emerging markets include:
- Energy production and the natural gas supply chain
- Nano-materials
- 3-D printing

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<th>IMPACT MEASURES</th>
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<td><strong>12,100</strong></td>
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Life Sciences Leadership

- 5th in the U.S. and 2nd in the Mid-Atlantic for higher education Research & Development expenditures
- 5th in the U.S. for state agency R&D expenditures
- 4th in the U.S. for life science-related patents
- More than 1,800 research, testing and medical labs
- Eight Pennsylvania universities are categorized by the Carnegie Foundation as having “Very High” or “High” research activity
Medical Device Manufacturing

**Ben Franklin Technology Partners**
- $14.7 million in 174 companies
- Attracted an additional $525 million in post-Ben Franklin financing
- 132 patents and software copyrights awarded to client companies

**Life Science Greenhouses**
- Invested more than $67.8 million in more than 133 projects since 2001
- More than $3 billion in private funds leveraged
- 175 life-saving patient care products brought to market
Technology

- Pennsylvania has a robust incubator system, strategic programs, an abundance of research institutions and institutions of higher education
- Pittsburgh and Philadelphia are among the top 15 in the U.S. for Tech Startup Investments in 2012
- Pennsylvania was ranked 5th in technology and innovation by CNBC’s “America’s Top States for Business” (2012)
Creative Industries

- Videogame Growth Initiative (VGI) Philadelphia is a project started by several game developers and professionals to develop, promote, and support the growth of the interactive software entertainment industry in the region.
- Harrisburg University, Carnegie Mellon University and Drexel University have established a consortium of universities to promote the interactive media industry in Pennsylvania.
- Pennsylvania has Drexel University - Ranked 3rd in North America for Game Design Degrees by the Princeton Review.
- The University of Pennsylvania is the only Ivy League school offering a graduate degree in Game Programming.

Ranked 1st in the U.S. for the highest growth rate in art-related industries

4 Top 50 Colleges & Universities in the U.S.

PA has 21 accredited film schools
GSP Diversity in Industry Structure
Pennsylvania is home to a mature and robust mix of industries.

Source: Bureau of Economic Analysis; values in millions of 2012 dollars
Education and Training Hub

Open Doors (www.iie.org/opendoors) ranks Pennsylvania as the sixth largest host state for international students with a total of over 33,000 students in 2012. These students are estimated to spend more than $1.07 billion in the Commonwealth.

# 6

257

Degree Granting Higher Education Institutions

740,000

Students in Degree Programs

Sources: U.S. Census Bureau; National Center for Education Statistics
Numerous nationally recognized institutions of Higher Education


Note: Pennsylvania has 122 schools with technical programs offered at 166 locations in 93 Pennsylvania cities leading to technical certificates or associate degrees; some of these may be in Community Colleges.
Impact of International Students

- Pennsylvania attracts more than 33,000 foreign students to study in PA
- India is the 2nd leading country of origin for foreign students in Pennsylvania, accounting for 15.8% of all international students enrolled in the state.
- By 2020, it is expected that India will be the top country of origin for all international students studying in the U.S.
- International students in Pennsylvania support more than 17,500 full-time jobs in the commonwealth
- The net contribution of international students and their families to the Pennsylvania economy exceeds $1 billion in tuition and living expenses alone

Source: National Association of Foreign Student Advisors (NAFSA)
A Game Changer

The Marcellus Shale formation has created tremendous economic opportunities across Pennsylvania.

The U.S. Geological Survey recently estimated that the formation contained:

- 38 trillion cubic feet of recoverable natural gas
- 940 million barrels of oil,
- 8 million barrels of natural gas liquids like ethane and propane

Beneath the Marcellus is the Utica Shale, with additional gas, oil and liquids.

Big Indian Player in the Energy Market
Reliance Energy in partnership with Atlas Energy—significant holdings near Pittsburgh
Extended Supply Chain

Thirty different industries have been identified that directly support the Marcellus Shale core industries. Together, these industries employ more than 200,000 individuals.
Diversity of Manufacturing

Pennsylvania’s manufacturing industry is highly diversified.
PA is a great place to do business...

- Largest international investment and trade network in the U.S.
- Reduced business taxes by more than $2 billion since 2004
- Proximity to low cost source of energy
- Strong commitment to Indian market: First US state to open a full-time investment & trade office in India
- Superior market access to Northeast and Midwest U.S. and eastern Canada
- Good transportation with direct international flights
- Strong technology sector
- Access to some of the best colleges and universities in the world with a program specially aimed at attracting Indian students
- Solid service by state and regional partners
- PA is the fastest growing state for FDI
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