



WINNING WHERE IT COUNTS

An FDI Playbook for **U.S. States** | 2025- 26

Grounded in real investor intent data. Built for action. Insights from Nueconomy's CUES platform

Executive Framing

2024 is behind us. The investment signals are clear. With full-year corporate expansion intent tracked via Nueconomy's CUES platform and Q1 2025 updates, we now have a high-resolution view of how global companies are making location decisions across North America.

This whitepaper is not a backward-looking recap.

It's a tactical and sector-specific roadmap for what U.S. states should do from mid-2025 to SelectUSA 2026 — to win the next wave of global projects.

Nueconomy is a global economic development advisory firm specializing in investment promotion, corporate expansion intelligence, and trade development. Our proprietary CUES platform tracks real-time corporate expansion intent across sectors and geographies, helping governments and location stakeholders translate investor behavior into action.

This marks our second strategic FDI briefing for SelectUSA, where we focus on identifying forward-looking trends and high-impact investment opportunities for U.S. states navigating an increasingly competitive global landscape.

All sectoral insights in this briefing are based on corporate expansion intent data tracked from January 2024 to March 2025 via Nueconomy's CUES platform.

Manufacturing & Mobility

Be Factory-Ready, Not Factory-Hopeful

	<ul style="list-style-type: none">• EV supply chains are moving upstream — cathode, anode, battery recycling.• High intent from Korean, Japanese, and Indian component suppliers.• States with access to logistics corridors and clean power are outperforming larger but less-prepared states.
Action	Fast-track permits for secondary battery facilities, showcase logistics-linked megasites, and co-brand talent programs with OEMs

	<ul style="list-style-type: none">• Investors are targeting energy hardware — electrolyzers, inverters, & battery containers.• Clean grid access > cash incentives in 2024 expansion decisions.• High intent from Nordic, German, and Canadian manufacturers.
Action	Designate clean energy industrial parks. Launch “Energy Workforce Accelerators” to address technician shortfalls.

Shift from Deployment to Hardware

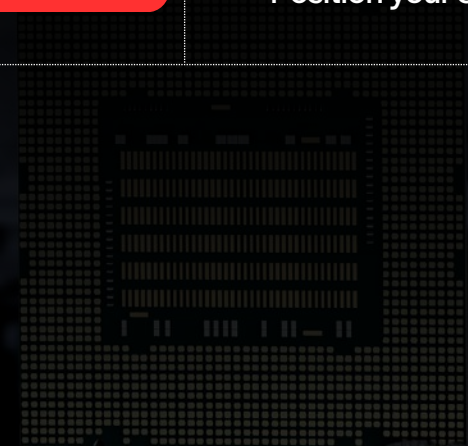
Clean Energy Manufacturing

Life Sciences

Decentralizing Biomanufacturing

	<ul style="list-style-type: none">• Corporate expansion intent is spreading beyond Boston and RTP.• Foreign firms want FDA-compliant, value-access sites for biosimilars, digital diagnostics.• High intent from Swiss, Israeli, and Japanese firms.
Action	Build wet-lab ready zones in Tier 2 metros. Market compliance-readiness and clinical trial partnerships.

	<ul style="list-style-type: none">• The fab land rush is slowing — now it's advanced packaging, materials, tools.• Intent rising from Taiwan, Netherlands, Korea in chip adjacents.
Action	<ul style="list-style-type: none">• Focus marketing on engineering pipelines, not just land.• Position your state as a “Chip Ecosystem Node.”



The Next Tier Is Investable

Semiconductors

Digital Infrastructure

Power, Permitting & Proximity

- Data center intent remains hot, especially for AI-ready builds.
- Key driver: low latency + low cost + fast approval.
- Intent from Singaporean and Canadian infrastructure funds is expanding into Tier 2 metros.

Action

Create pre-certified “Power Zones” with fiber, cooling, and redundancy mapped and ready.

What Expansion Leaders Want in 2025–2026	
	<ul style="list-style-type: none">• Skill shortages — not site shortages — are now the main barrier.• Credential-led training is outperforming generic workforce promises.
Action	<ul style="list-style-type: none">• Launch 4–6 micro-credential programs across battery, clean energy, medtech, and fab-adjacent skills.• Align with industry naming: “<StateName> + [Partner] Academy.”

Credential-Based, Sector-Specific

Workforce

Site Readiness

“Available Land” \neq “Permittable, Buildable, Fundable”

Lessons from 2024 investor behavior (CUES + project drop-off tracking)

- Many projects fall off shortlists due to delayed site permits or grid uncertainty.

Action

- Offer 90-day guarantee tracks.
- Publicly score and publish your “Build Certainty Index” per site.

Where the Intent is Coming From (2024–Q1 2025)

Top Global Source Markets (per CUES):

	South Korea	EV Batteries, Chip Packaging
	Germany	Hydrogen Equipment, Smart Grid
	India	Diagnostics, Solar Modules, Contract Engineering
	Singapore	Cybersecurity, Cloud Infra
	Canada	Wind, Battery Materials, Power Electronics
	Japan	Med Devices, Automation
	Nordics	Green Steel, Offshore Energy Equipment



Action

Run sector + source campaigns
(e.g., “Midwest for German Greentech”)

Onboarding & Aftercare: Turn Foreign Firms Into Repeat Investors

Top Global Source Markets (per CUES):

Data Insight	Repeat expansions often happen within 12–18 months if onboarding is seamless.
Action	<ul style="list-style-type: none">• Launch a concierge-style investor onboarding experience.• Add multilingual support, family relocation help, and compliance liaisons.• Track NPS of every FDI project for reinvestment targeting.

What to Stop Doing (Based on 2024 Project Drop-offs)



Targeting only megaprojects – too few, too late.



Generic workforce messaging – lacks investor trust.



Delayed grid commitments – a top deal-killer in 2024.

Outlook to Mid-2026

1 Capital-Light Is In

- More capital-light projects coming: R&D, software, assembly.

2 Speed > Subsidies

- High-value suppliers prefer speed and supply chain proximity over incentives.

3 Tier 2's Time to Win

- “Strategic Tier 2s” will win — metros that can show up on radar with fast permits, clean grid, and talent-to-hire pipelines.

Action

Prepare case studies for post-SelectUSA outreach now, not in 2026.

Top 10 Action Moves for States (2025–2026)

- 1 Pre-certify 3–5 sites with 90-day permits
- 2 Launch 4 sector-specific credential programs
- 3 Publish an “FDI Fast Lane” incentive calculator
- 4 Build an investor GIS portal
- 5 Formalize aftercare for all FDI firms
- 6 Re-market certified sites with real-time dashboards
- 7 Target foreign SMEs, not just megafirms
- 8 Deploy sector + country outbound campaigns
- 9 Create soft landing packages with relocation concierge
- 10 Form a Governor’s Investor Circle with testimonials from 3–5 foreign firms

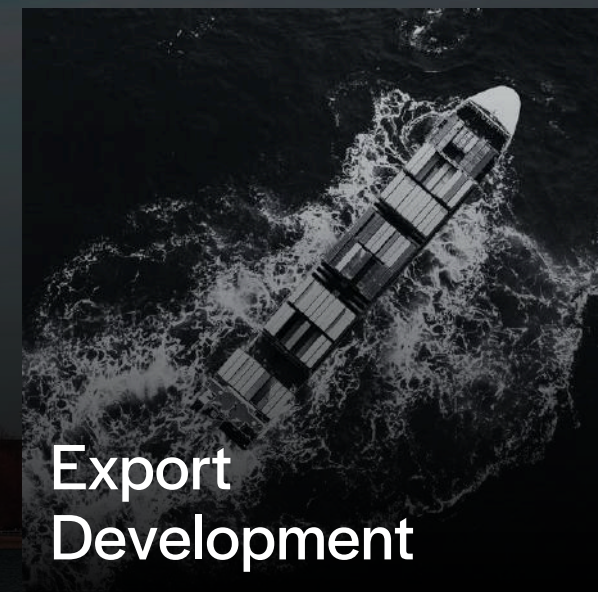
Nueconomy Solutions: Investment & Trade Success



Unlock high-conversion investor leads tailored to your specific location, supply chain capabilities, and cluster goals. Our global sourcing connects you with top-tier greenfield investors, strategic partners, and institutional investors, ensuring alignment with your strategic objectives.



Partner with us to secure investors across India, UAE, and the APAC. Our pay-by-performance model ensures we drive investor engagement that is aligned with your objectives. Our delivery models include roadshows, short-term investment promotion campaigns, and multi-year representation projects.



When it comes to Export Development, trust in our expertise. We offer expert trade knowledge, entry strategies, and transaction support to help your exporters penetrate new markets in the Middle East and APAC. Expand your market reach with confidence.

About Nueconomy

Nueconomy is a trusted advisor to governments and public sector institutions, providing innovative and effective solutions to build strong and sustainable economies. Our expertise in investment attraction and trade consulting makes us a leading strategic thought leader in economic development for over a decade. Our research capabilities and talented team enable us to deliver unparalleled value to our clients in every partnership.

18+

Years of Industry Leadership

400+

Investment Attraction &
Export Development Projects Delivered

1200+

Jobs Created &
USD 250m+ Investment Mobilized

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Source Notes

All content and insights in this whitepaper are based on:

- Nueconomy's CUES Platform: Corporate Expansion Intent (January 2024 to March 2025)
- fDi Intelligence, Global Greenfield Investment Monitor 2024
- BloombergNEF (Energy tech expansion trends, 2024)
- Semiconductor Industry Association (Q1 2025 U.S. FDI tracking)
- SelectUSA 2024 Investor Outlook Briefs
- OECD FDI Policy Tracker (2024)
- U.S. Department of Commerce, BEA: 2024 preliminary FDI inflow and capex data
- Country-level IPA data (KOTRA, GTAI, Enterprise Singapore, Invest India)
- Tennessee, North Carolina, and Georgia FDI agency case studies (2024)