JOBSOHIO.

JobsOhio and its Network partners are focused on driving **job creation**, new **capital investment**, and **economic growth** for Ohio by helping businesses achieve their strategic goals.

- 25-year lease of liquor franchise
- Approximately $125 million annually for economic development

**What this dedicated funding stream supports:**
- Corporate Relationship Development & Management
- JobsOhio Growth Fund Loans
- JobsOhio Economic Development Grant
- JobsOhio Workforce Grant
- JobsOhio Revitalization Program

**Targeted job growth and investment.**
JobsOhio is focused on winning ‘tradable’ or ‘discretionary’ industry projects.
THE AGRICULTURE VALUE CHAIN: OUR #1 INDUSTRY SECTOR?

Inputs & Production

**Crop**
- Corn
- Soybeans
- Wheat
- Other

**Animal**
- Beef
- Hogs
- Chicken
- Turkey
- Other

Mid-Stream

Down-stream

US Retail & Foodservice

Consumers

- Canada 35m
- USA 320m
- Latin America 600m
- Rest Of World 6b

Export

- Canada 35m
- USA 320m
- Ohio 11.5

<table>
<thead>
<tr>
<th>Crop</th>
<th>Output $b</th>
<th>Ohio GSP $b</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corn</td>
<td>$15</td>
<td>$5</td>
<td>125k</td>
</tr>
<tr>
<td>Soybeans</td>
<td>$50</td>
<td>$22</td>
<td>110k</td>
</tr>
<tr>
<td>Wheat</td>
<td>$40 =</td>
<td>$23 =</td>
<td>$665k =</td>
</tr>
<tr>
<td>Other</td>
<td>$105 B</td>
<td>$50 B</td>
<td>900 k</td>
</tr>
<tr>
<td></td>
<td>12% OH</td>
<td>11% OH</td>
<td>15% OH</td>
</tr>
</tbody>
</table>
AG / FOOD PROCESSING POWERHOUSE.

COMPANY                       APPROX # EMPLOYEES
Nestlé                        2,500
Kroger                        2,500
Smucker’s                     2,000
ConAgra Foods                 1,750
Heinz                         1,500
General Mills                 1,500
Campbell’s                    1,500
Abbott                        1,500
Cooper Farms                  1,500
The Andersons                 1,200
Bellisio Foods                1,200
Bob Evans                     750
Anheuser Busch                600
Pepperidge Farm               550
Danone                        400
Gerber’s Amish Farm           350
Smith’s Dairy                 300
Daisy Brand                   100

Bold: selected 2012/2013 Wins; Employment estimates HQ/Mfg only.

Regional, National, Multinational Brands.
US Healthcare Value Chain: $3T and 17% of GDP.

**PRODUCTS**
- Rx: AstraZeneca, Novartis, Abbott, Merck, Pfizer
- Medical: Ethicon, Meridian, Steris, Siemens

**DISTRIBUTION**
- Cardinal Health

**SERVICES**
- Omnicare, Steris, Ethicon, Ethicon

**CARE PROVISION**
- H, Kroger, Vaticore

**PATIENTS**
- Range of “Healthy” 320m +
- Cardiology
- Oncology
- Neurology

**R&D**
- NIH, National Cancer Institute, Cleveland Clinic, University Hospitals

**Financial**
- CareSource

- 436 firms (4 NAICS codes) 16,000 jobs (.3% of Ohio employment)
- 1,280 ‘bioscience’-related firms 60,000 jobs (1.1%)
- 550,000 jobs (10.5%)

Leading brands across value chain continuum.
BioHealth Employment Dominated by Care Provision.

<table>
<thead>
<tr>
<th>OH Rank</th>
<th>Employer</th>
<th>Employees</th>
<th>Primary Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Cleveland Clinic Foundation</td>
<td>41,400</td>
<td>Cleveland, OH</td>
</tr>
<tr>
<td>4</td>
<td>Ohio State University</td>
<td>29,900</td>
<td>Columbus, OH</td>
</tr>
<tr>
<td>6</td>
<td>Catholic Healthcare Partners</td>
<td>28,800</td>
<td>Cincinnati, OH</td>
</tr>
<tr>
<td>8</td>
<td>University Hospitals Health System, Inc.</td>
<td>24,000</td>
<td>Shaker Heights, OH</td>
</tr>
<tr>
<td>11</td>
<td>OhioHealth</td>
<td>19,260</td>
<td>Columbus, OH</td>
</tr>
<tr>
<td>13</td>
<td>Cincinnati Children’s Hospital Medical Center</td>
<td>14,000</td>
<td>Cincinnati, OH</td>
</tr>
<tr>
<td>16</td>
<td>ProMedica Health System</td>
<td>13,400</td>
<td>Toledo, OH</td>
</tr>
<tr>
<td>23</td>
<td>Kettering Health Network</td>
<td>10,000</td>
<td>Kettering, OH</td>
</tr>
<tr>
<td>23</td>
<td>Summa Health System</td>
<td>10,000</td>
<td>Akron, OH</td>
</tr>
<tr>
<td>23</td>
<td>UC Health</td>
<td>10,000</td>
<td>Columbus, OH</td>
</tr>
<tr>
<td>31</td>
<td>Trinity Health / Mount Carmel Health System</td>
<td>9,100</td>
<td>Livonia, MI</td>
</tr>
<tr>
<td>39</td>
<td>Nationwide Children’s Hospital</td>
<td>7,025</td>
<td>Columbus, OH</td>
</tr>
<tr>
<td>56</td>
<td>MetroHealth System</td>
<td>5,400</td>
<td>Cleveland, OH</td>
</tr>
<tr>
<td>60</td>
<td>Akron General Health System</td>
<td>5,200</td>
<td>Akron, OH</td>
</tr>
<tr>
<td>61</td>
<td>Christ Hospital Corporation</td>
<td>5,025</td>
<td>Cincinnati, OH</td>
</tr>
<tr>
<td>62</td>
<td>Aultman Health Foundation</td>
<td>5,000</td>
<td>Canton, OH</td>
</tr>
<tr>
<td>68</td>
<td>Akron Children’s Hospital</td>
<td>4,800</td>
<td>Akron, OH</td>
</tr>
</tbody>
</table>

Top 100 Direct Care Provision: 268,810

13 of top 50 OH employers are care providers.
Cleveland Clinic alone 2x top 30 products/services providers.