



State of the Region Conference

JobsOhio Update

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JOBSONIO.

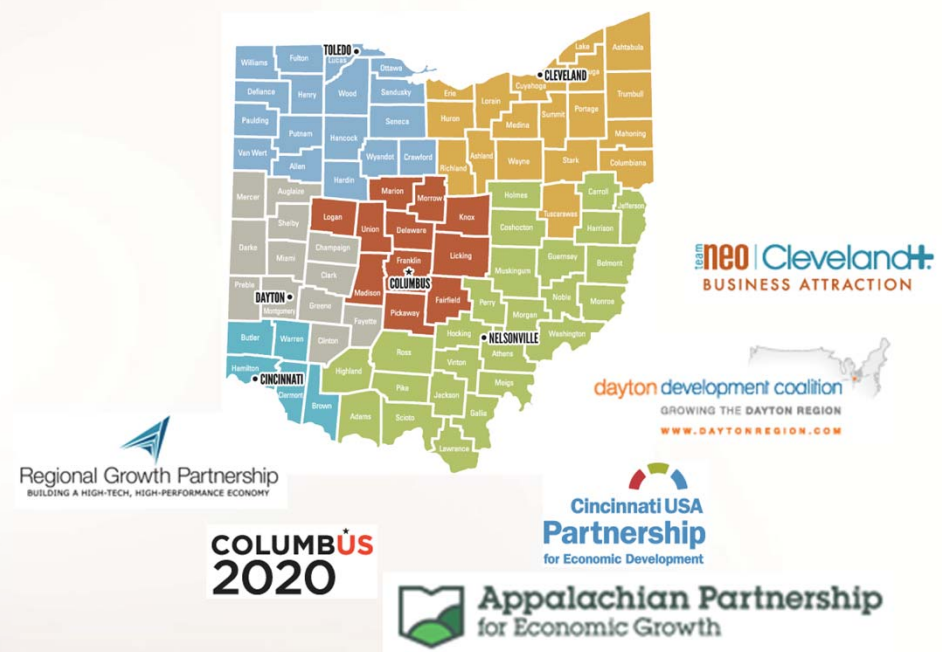
Ohio

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

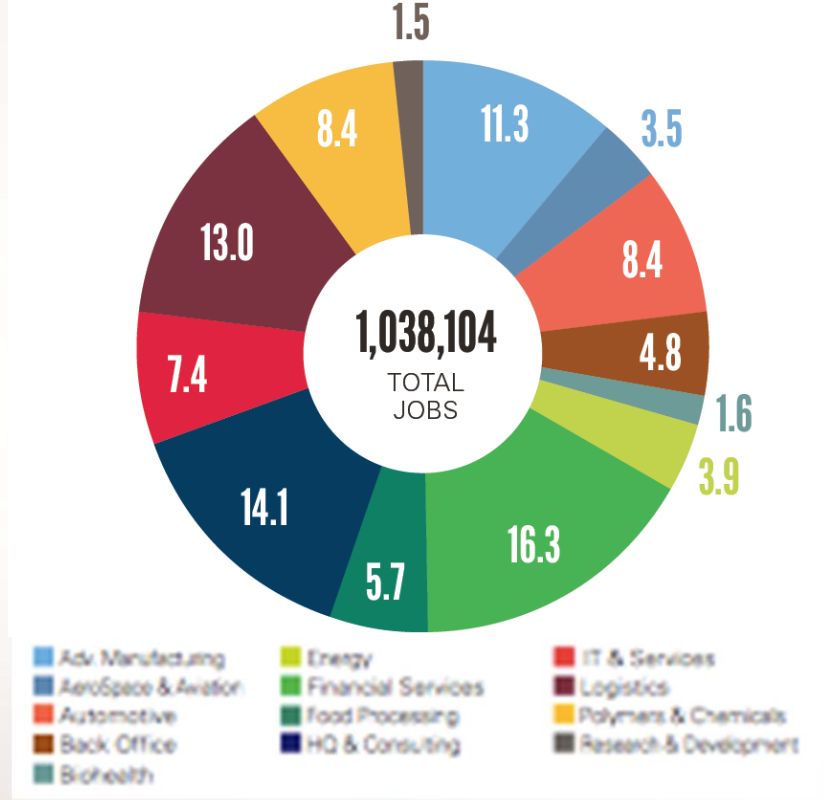
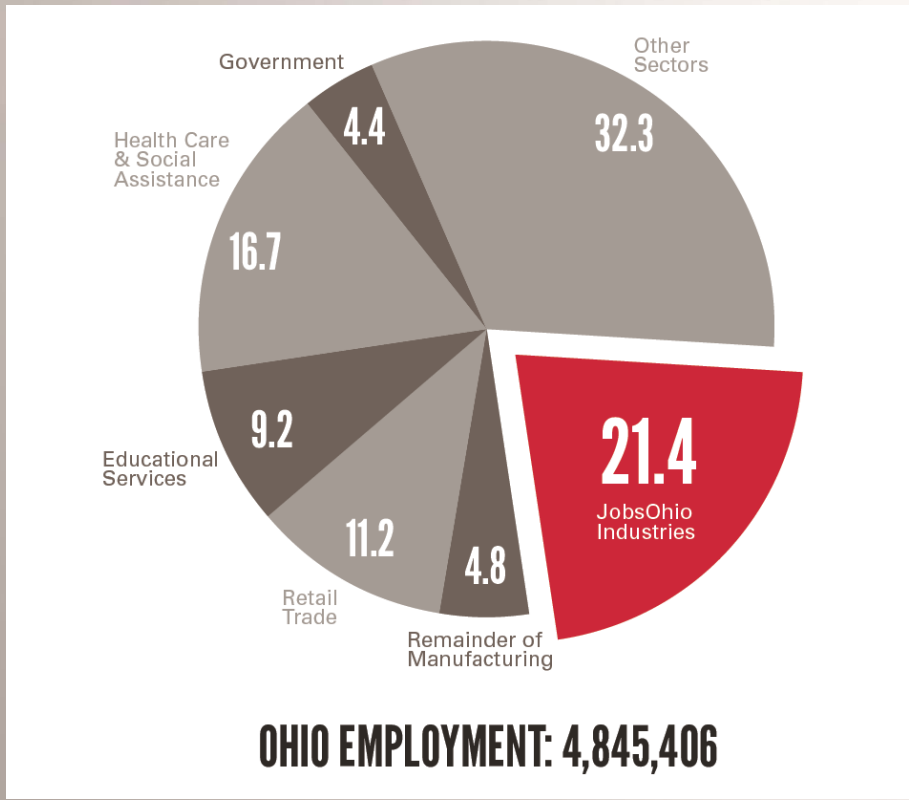


Targeted job growth and investment.

TARGETED INDUSTRY FOCUS.



JobsOhio is focused on winning 'tradable' or 'discretionary' industry projects.



Targeted job growth and investment.

THE AGRICULTURE VALUE CHAIN: OUR #1 INDUSTRY SECTOR?



Inputs & Production

Crop
Corn
Soybeans
Wheat
Other

Animal

Beef
Hogs
Chicken
Turkey
Other

Mid-Stream



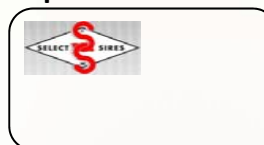
Down-stream



US Retail & Foodservice



Export



Consumers

Canada 35m **2050**

USA
320m **+80m**
Ohio 11.5

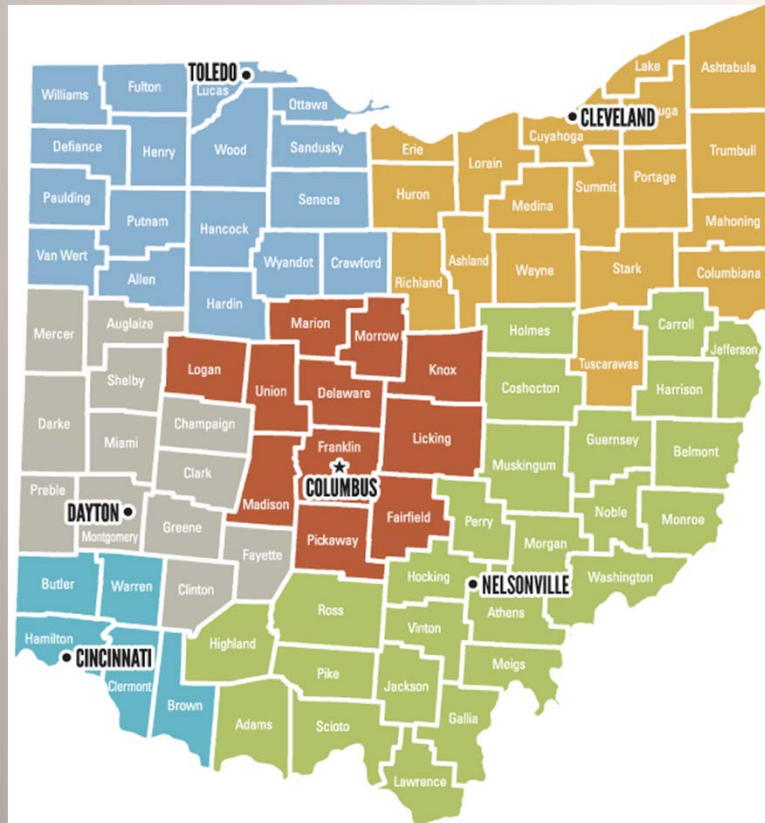
Latin America
600m **+200m**

Rest Of World
6b **+2 b**



Output \$b	\$15	\$50	\$40 =	\$105 B	12% OH
Ohio GSP \$b	\$ 5	\$22	\$23 =	\$ 50 B	11% OH
Employment	125k	110k	665k =	900 k	15% OH

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.

Ohio

PRODUCTS

Rx

Medical

DISTRIBUTION

SERVICES

CARE PROVISION

PATIENTS

Range of "Healthy" 320m +

Cardiology

Oncology

Neurology

R&D

Financial



436 firms (4 NAICS codes)

16,000 jobs (.3% of Ohio employment)

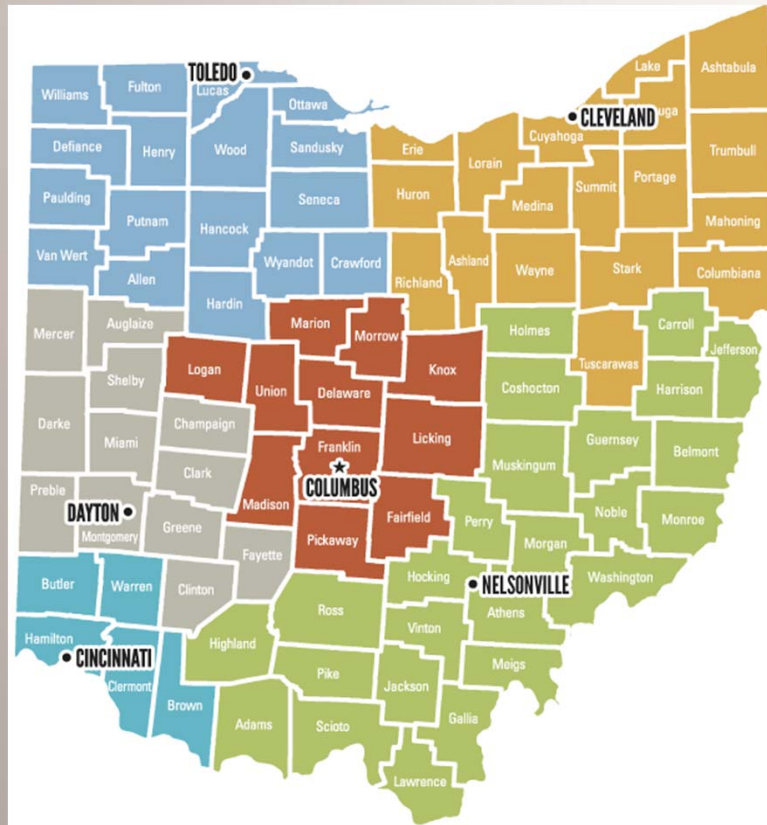
1,280 'bioscience'-related firms

60,000 jobs (1.1%)

550,000 jobs (10.5%)

Leading brands across value chain continuum.

BioHealth Employment Dominated by Care Provision.



<u>OH Rank</u>	<u>Employer</u>	<u>Employees</u>	<u>Primary Location</u>
2	Cleveland Clinic Foundation	41,400	Cleveland, OH
4	Ohio State University	29,900	Columbus, OH
6	Catholic Healthcare Partners	28,900	Cincinnati, OH
8	University Hospitals Health System, Inc.	24,000	Shaker Heights, OH
11	OhioHealth	19,260	Columbus, OH
13	Cincinnati Children's Hospital Medical Center	14,000	Cincinnati, OH
16	ProMedica Health System	13,400	Toledo, OH
23	Kettering Health Network	10,000	Kettering, OH
23	Summa Health System	10,000	Akron, OH
23	UC Health	10,000	Cincinnati, OH
31	Trinity Health / Mount Carmel Health System	9,100	Livonia, MI
39	Nationwide Children's Hospital	7,825	Columbus, OH
56	MetroHealth System	5,400	Cleveland, OH
60	Akron General Health System	5,200	Akron, OH
61	Christ Hospital Corporation	5,025	Cincinnati, OH
62	Aultman Health Foundation	5,000	Canton, OH
68	Akron Children's Hospital	4,600	Akron, OH
Top 100 Direct Care Provision		268,810	
3	Kroger Co.	39,000	Cincinnati, OH
10	Giant Eagle, Inc.	19,500	Pittsburgh, PA
37	HCR ManorCare, Inc. / Carlyle Group, L.P.	8,300	Toledo, OH
47	CVS Caremark Corporation	6,600	Woonsocket, RI
52	Walgreen Co.	5,600	Deerfield, IL
57	Cardinal Health, Inc.	5,350	Dublin, OH
67	Best Buy Co, Inc.	4,700	Richfield, MN
69	Rite Aid Corporation	4,500	Camp Hill, PA
79	Community Health Systems Inc. / Forum Health	3,600	Franklin, TN
83	WellPoint, Inc.	3,400	Indianapolis, IN
86	Express Scripts Holding Co.	3,200	St. Louis, MO
98	Discount Drug Mart, Inc.	2,700	Medina, OH

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