



JobsOhio Update OAIMA Annual Meeting

November 17, 2016

Our Collective Vision



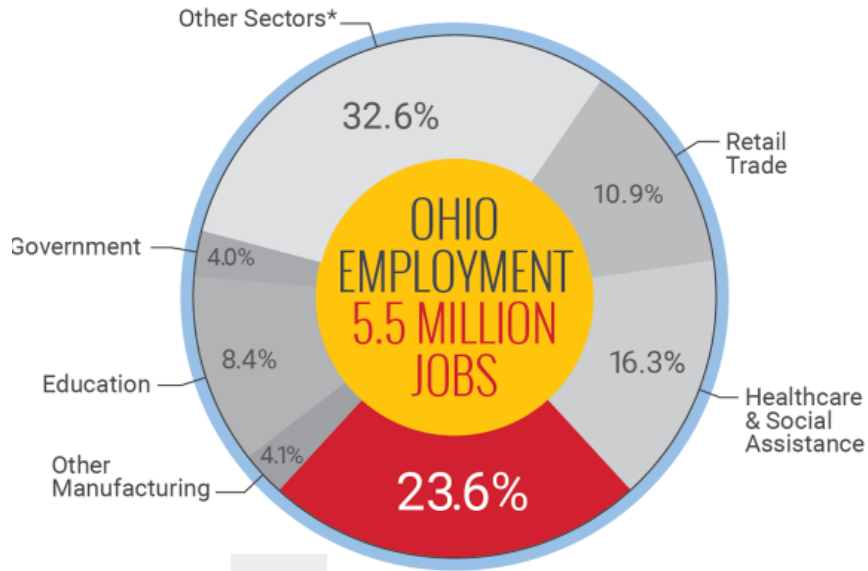
- Consistently lead the nation in private sector job gains and economic growth



- Become the **recognized leader in economic development in the U.S.** with the best people, best processes, best programs and best results

Strategy Remains Focused on 9 Key Industries...

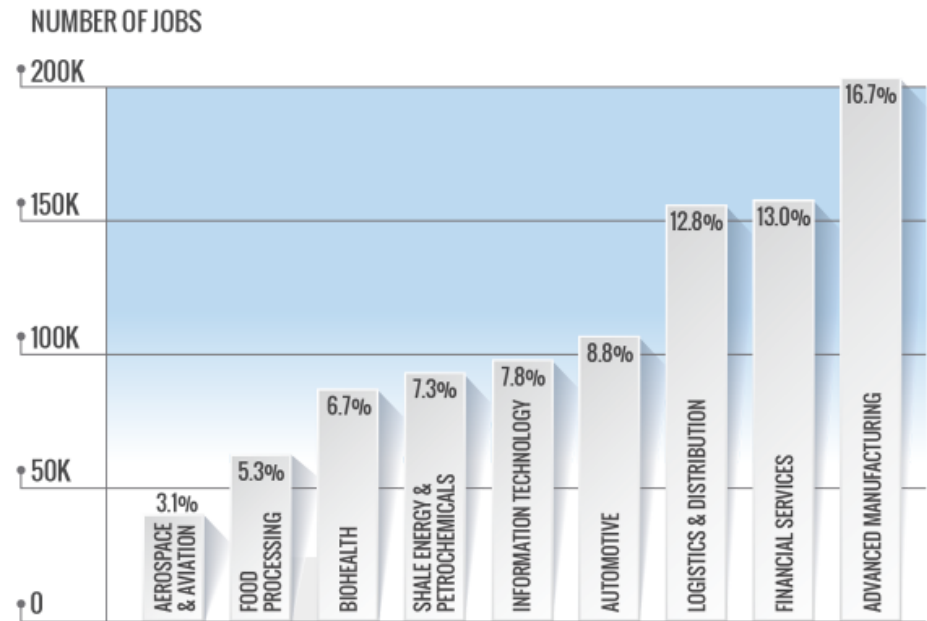
JobsOhio Industry Focus • 1.3 Million Jobs



Headquarters and Back Office are not included in this chart

*Other Sectors: Agriculture, Construction, Entertainment, Food Services, Forestry, Real Estate, and Recreation

Sources: U.S. Bureau of Economic Analysis, Moody's Analytics, Cleveland State University, Center for Economic Development, LAUS



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Focus on “tradable” economic development projects across the 9 sectors

Economic Development Indicators

The latest E&Y analysis provides continued third-party validation of Ohio's performance, while the Business Roundtable's latest CEO Outlook Index suggests continued concerns over a flat economy

- **2016 U.S. Investment Monitor by E&Y – Ohio Rankings**
 - #2 – number of projects; 3rd straight year
 - #3 – job creation announcements; same as 2015 ranking
 - #6 – new capital investment; ranked #5 in 2015
- **Business Roundtable Index – 3rd quarter 2016 CEO U.S. Economic Outlook**
 - Overall composite index of CEO expectations declined
 - CEOs report lower expectations for sales and hiring, and flat plans for capital spending over the next six months
 - Chairman of Business Roundtable: *“This reflects the unfortunate new normal – where the U.S. economy is pretty much stuck in neutral rather than moving forward.”*

Elevating Impact

- New initiatives and programs launched in 2016:
 - ✓ SiteOhio
 - ✓ Talent Acquisition
 - ✓ \$50mm Research & Development (R&D) Center Grant Program
- In addition to these new initiatives, JobsOhio has increased its efforts to strengthen Ohio's brand with companies across the U.S. and globally and continue to deepen our corporate relationships

These programs, investments and activities are designed to continue elevating JobsOhio's impact across Ohio

Pre-2011 Energy/PetChem Presence in Ohio

■ Attraction opportunity for Ohio

Raw
fossil
fuels

Upstream extractors



Gas
Pipelines

Liquids Pipelines

Fractionators/processors

Liquids
Storage

Ammonia
plants

Power
generators

Refineries



Ethane Steam Crackers

On-purpose
propylene
plants

Alkylation
plants

Methanol
plants

Industrial chemicals, coatings, and polymers companies/ JO Wins



Complex
chemicals

Initiatives Focused on Remaining Gaps in Value Chain

Attraction opportunity for Ohio

Raw fossil
fuels

Upstream extractors



ENERVEST



Gas Pipelines



DTE Energy



Liquids Pipelines



ENERGY TRANSFER



Sunoco Logistics

Fractionators/processors



MARKWEST

Liquids
Storage

Ammonia
plants



Power
generators



Lordstown
Energy

Refineries



bp



Steam crackers



On-purpose
propylene
plants

Alkylation
plants

Methanol
plants

Industrial chemicals, coatings, and polymers companies



SHERWIN-WILLIAMS

PolyOne

SAINT-GOBAIN

SOLVAY



Mitsui Chemicals



Renewables



Complex
chemicals

Strengthening Ohio's Brand with Corporate Executives

Representative Components of Sales & Marketing Plans

- Advertising Campaign: “It’s On”
- Sales Campaigns: Automotive & Plastics examples below
- Foreign Market Representation: Strategy focused on 6 key countries (Canada, Japan, China, Germany, UK & Italy)
- Overall Mantra: ***“See More, Win More & Close More Deals”*** for Ohio



Our Location is Your Competitive Advantage



Recent North American Attraction Investments in Ohio



2016

HQ relocation to Cleveland, contract sterilization services, 30 jobs



2015-16

Data centers, distribution facilities & alternative energy (~2,200 jobs)



DOLLAR SHAVE CLUB

2016

\$5mm, 185 job fulfillment center investment



2015

IT solutions for auto retail industry, 1,000 jobs in Cincinnati



2015

\$12mm, 175 job automotive supplier investment



2014

\$119mm, 425 job distribution facility investment in Findlay



2013

\$13mm, 250 job food manufacturing facility investment



2012

Online retailer now employs over 1,250 works in Columbus Region



2012

\$95mm, 240 job nutritional products manufacturing facility

Recent International/FDI Attraction Investments in Ohio



2016

\$21mm, 150 job vinyl floor manufacturing facility



2015

\$300mm, 300 job tissue paper manufacturing plant



2015

\$51mm, 170 job production facility for sterile injectable products



2015

1,500 job Customer Contact Center for credit card services



FUYAO



2015

World's largest automotive glass facility, \$450mm, 2,000+ jobs



BREWDOG



2015

U.S. HQ, \$30mm investment, 125 jobs



2015

\$899mm, 30 job natural gas power generation facility

Klarna



2014

North American FinTech HQ, 82 jobs

BORGERS



2014

\$60mm, 230 job automotive supply manufacturing facility

Recent International/FDI Attraction Investments in Ohio



2016

North American HQ for cybersecurity solutions, 15 jobs



2016

\$16mm, 140 job thermal management systems manufacturing facility



2015

Flexible packaging film facility, \$10mm investment, 80 new jobs



2015

175 acre greenhouse facility, \$79mm investment, 150 jobs



2014

\$27mm, 150 job automotive supply manufacturing plant



2014

\$8mm, 50 job plastic products manufacturing facility



2013

New Regional Service Center, \$50mm investment, 250 jobs



2013

Lululemon Distribution Center \$27mm investment, 170 jobs



2012

U.S. HQ for recruitment services firm, 90 jobs