



**OUR** *Assets. YOUR Advantage.*



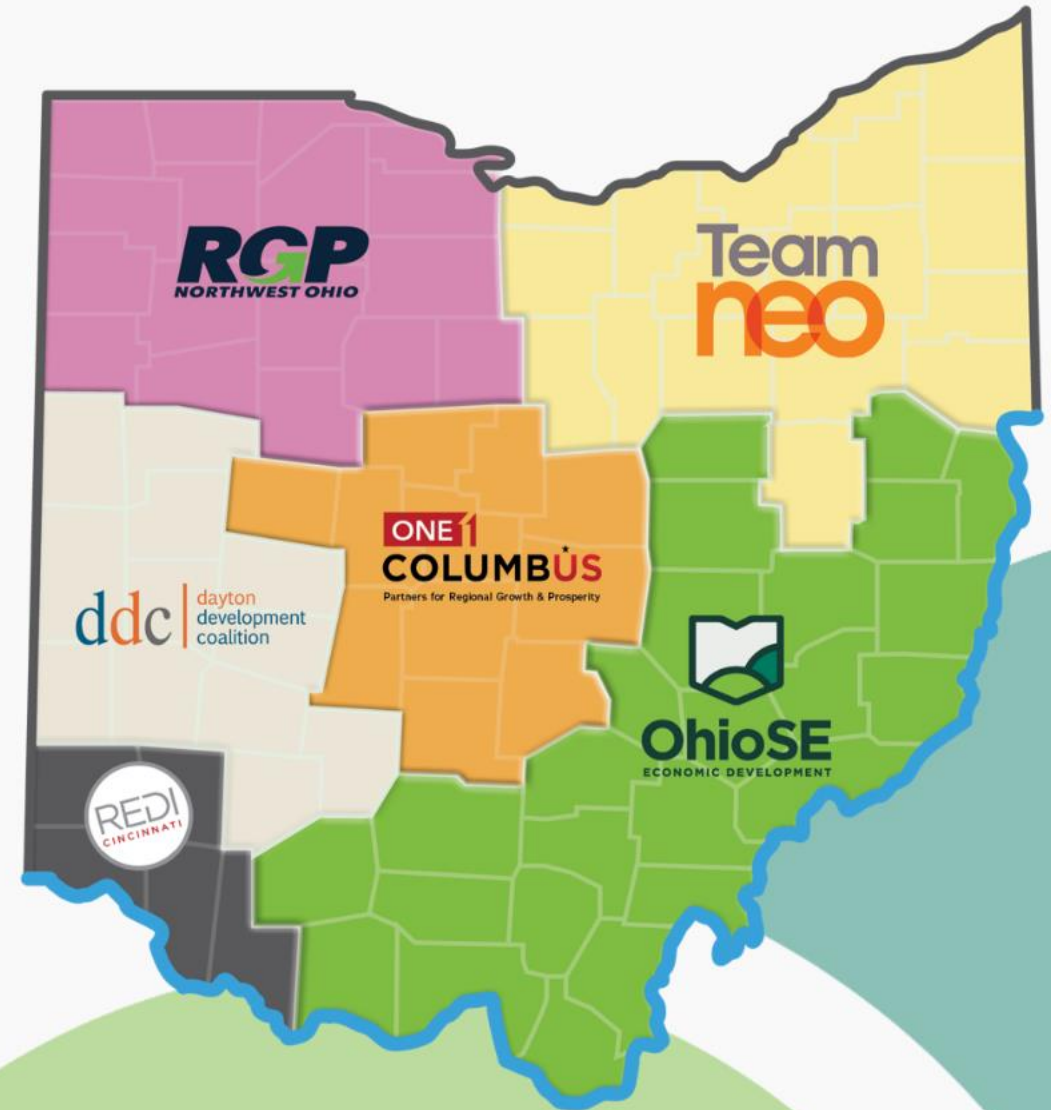
**JobsOhio.**  
Ohio's Economic  
Development Corporation



# OhioSE *Who we are*

OhioSE is a regional nonprofit that covers 25 mostly rural counties in south, east, and southeast Ohio. The OhioSE region makes up almost 1/3 of Ohio's land mass and has a population of over 1 million people, but no city has more than 27,000 residents.

As a JobsOhio Network Partner, our team of 13 serve as the field staff for JobsOhio, with a focus on business retention & expansion, business attraction, site selection and development, and regional leadership engagement.



OHIO SOUTHEAST

# OhioSE Overview

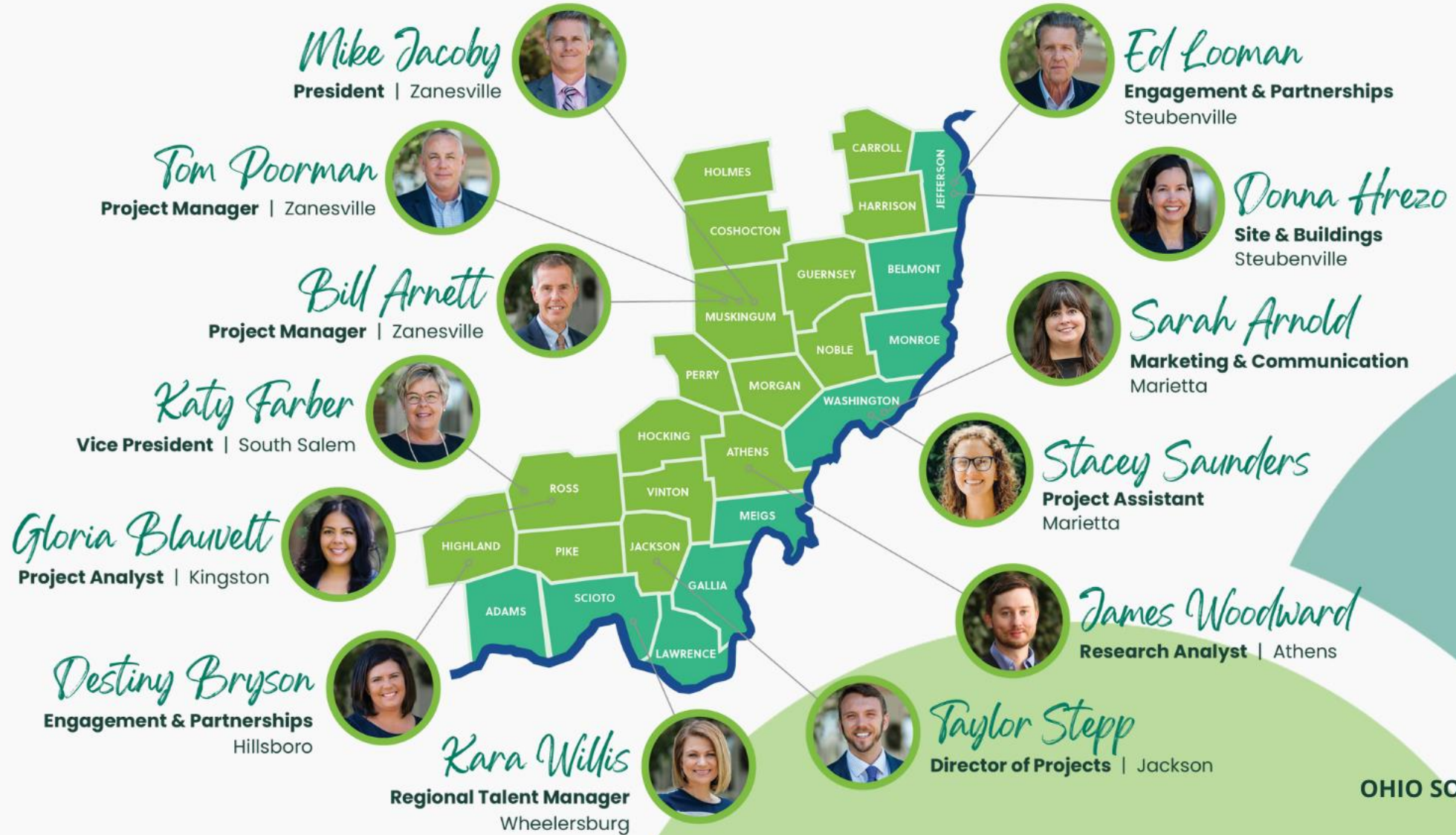


- OhioSE was established in 2011, fostered by Foundation for Appalachian Ohio, to be the JobsOhio Partner in the 25 county region
- Appalachian Partnership Inc. (API) is our parent organization and Appalachian Growth Capital (AGC) is a sister organization
- Our team supports many facets of regional economic development
- We work closely with local development directors, Local Development Districts, OU Voinovich School of Public Affairs, and others





# The OhioSE Team



OHIO SOUTHEAST

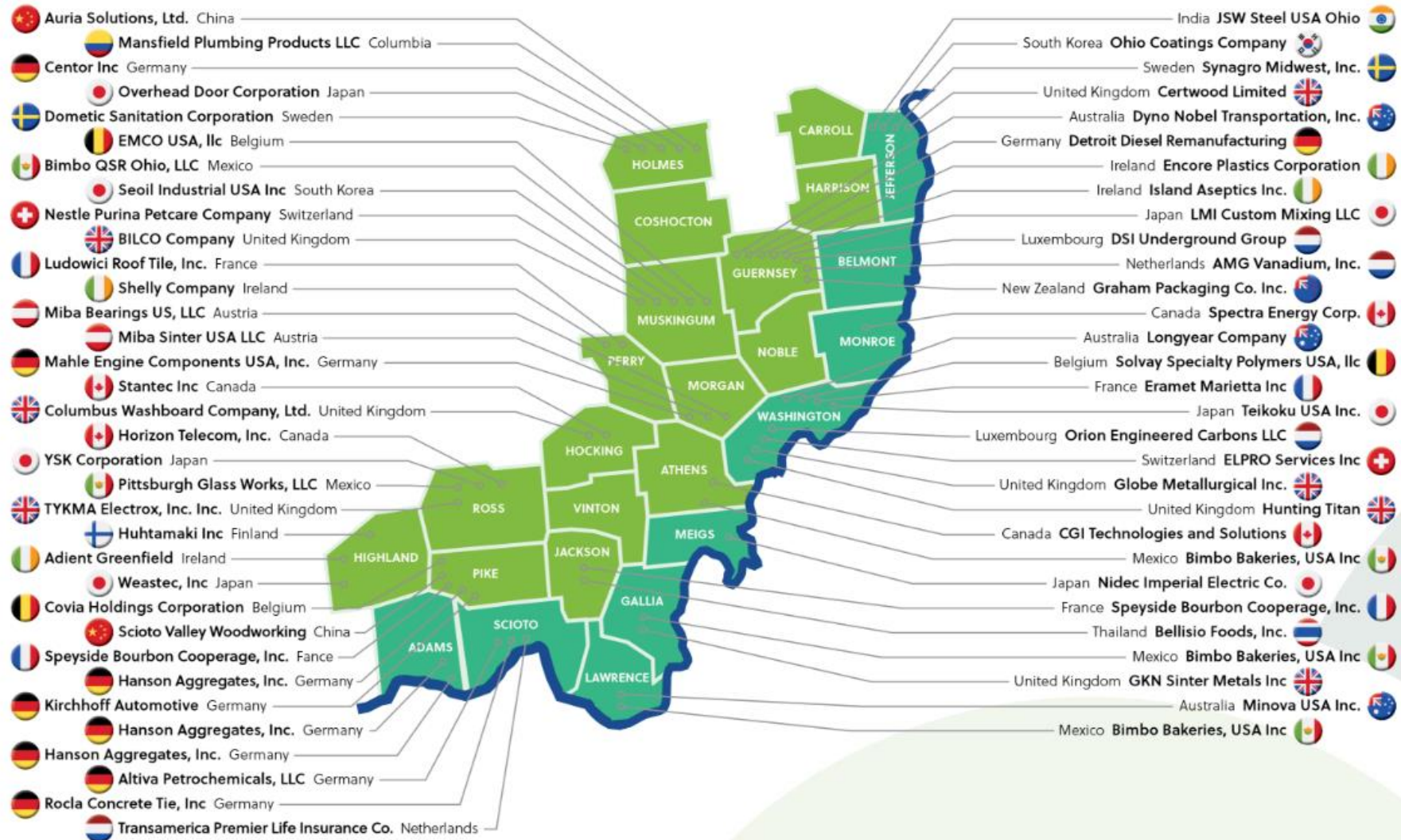
# Great **Market Access** to the Northeast, Midwest, and Southeast USA as well as Greater Toronto

**175 Million**  
People within  
One Day's Truck  
Drive





# Home to 63 Foreign Owned Facilities





**46**  
PROJECTS

**1,238**  
NEW JOBS



*Results in*  
**Southeast Ohio**  
**2022**



**\$265M**  
FIXED ASSET CAPITAL  
INVESTMENT



**380+**  
PROJECTS



**11,000+**  
NEW JOBS

*Results in*  
**Southeast Ohio**  
2011-2022

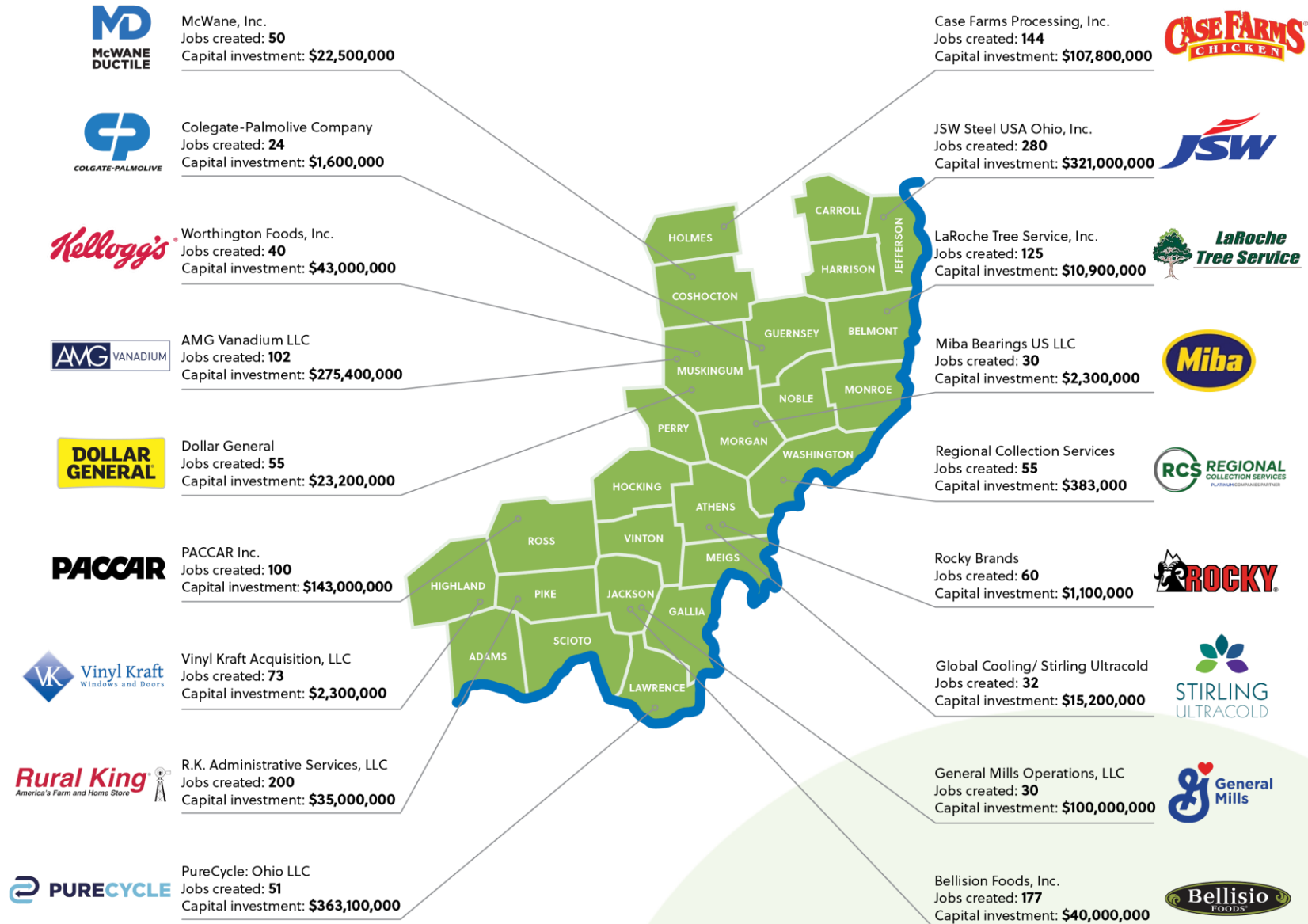
**\$15.7B**

FIXED ASSET CAPITAL  
INVESTMENT



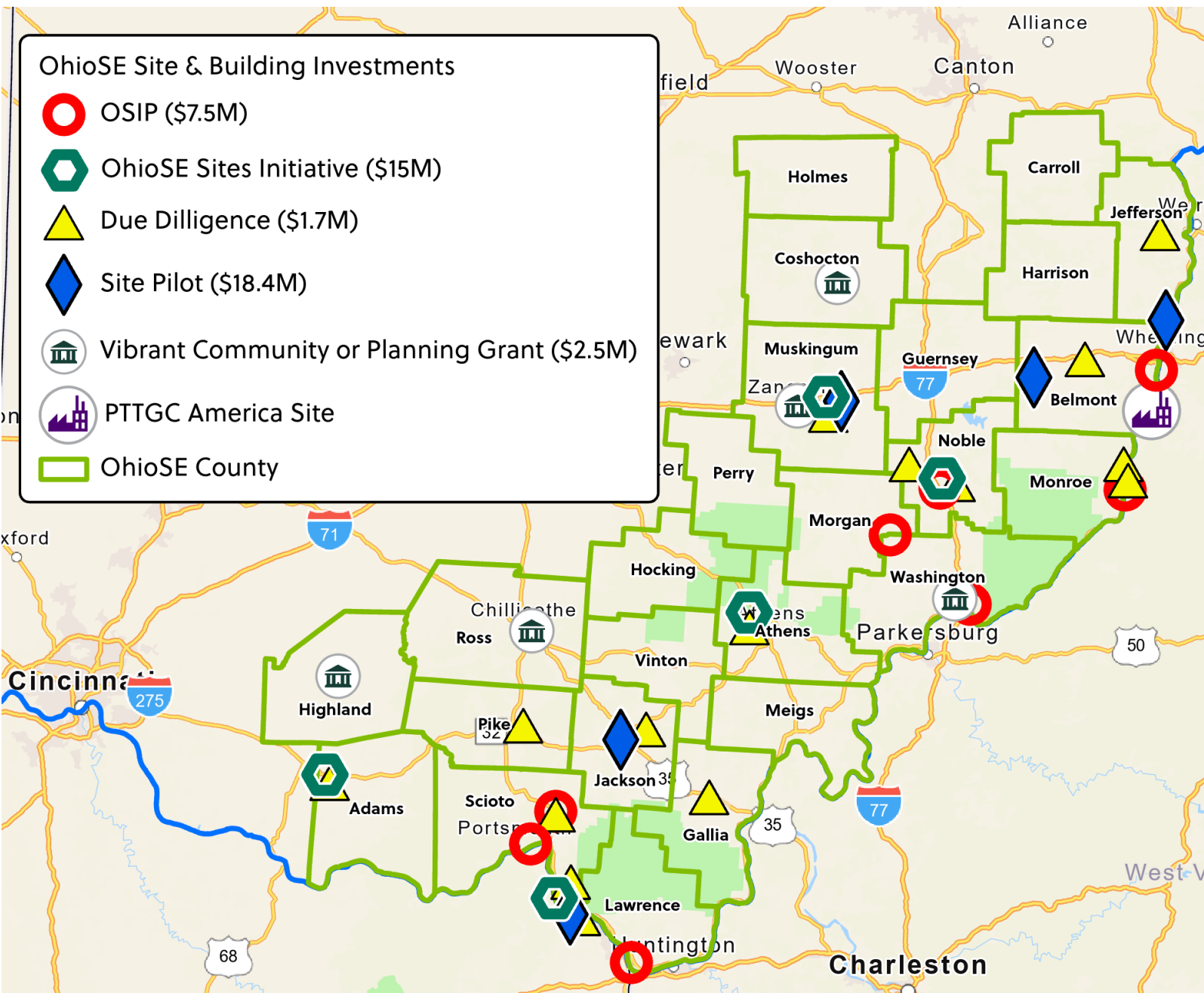


# Impactful Investments in the OhioSE Region



# Speculative Site & Building Investments

Over **\$42 million** of JobsOhio Investment in industrial parks, sites, buildings, and infrastructure



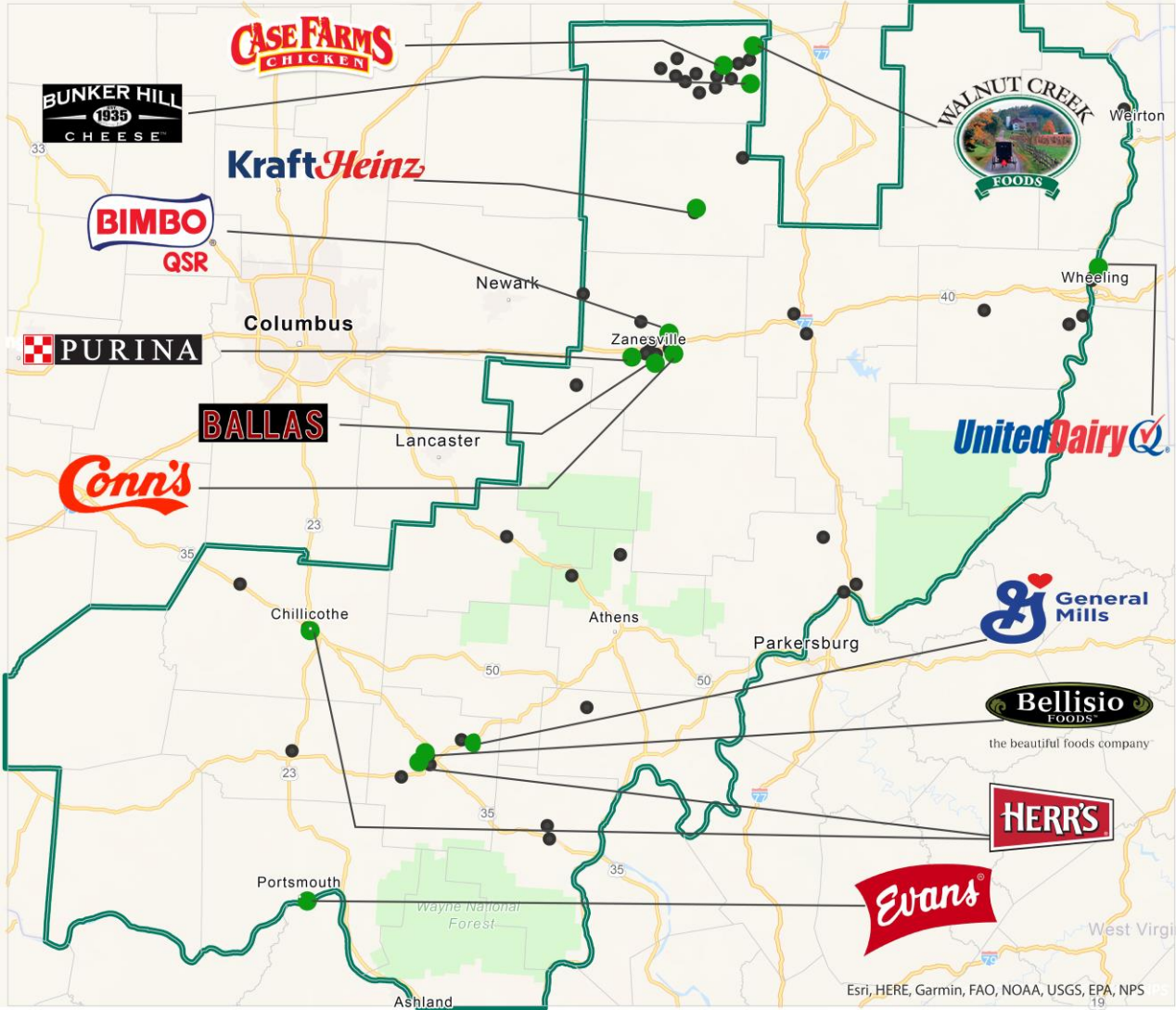


# What's Trending in OhioSE?

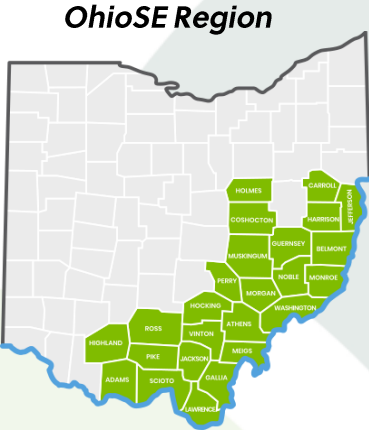
- 2022 Activity in the Food Processing Sector
- Labor Challenges
- We have what the world wants: Natural Gas
- Site Selection, Site Development & activity around new industries



# OhioSE Food Manufacturers Map & Earnings Comparison



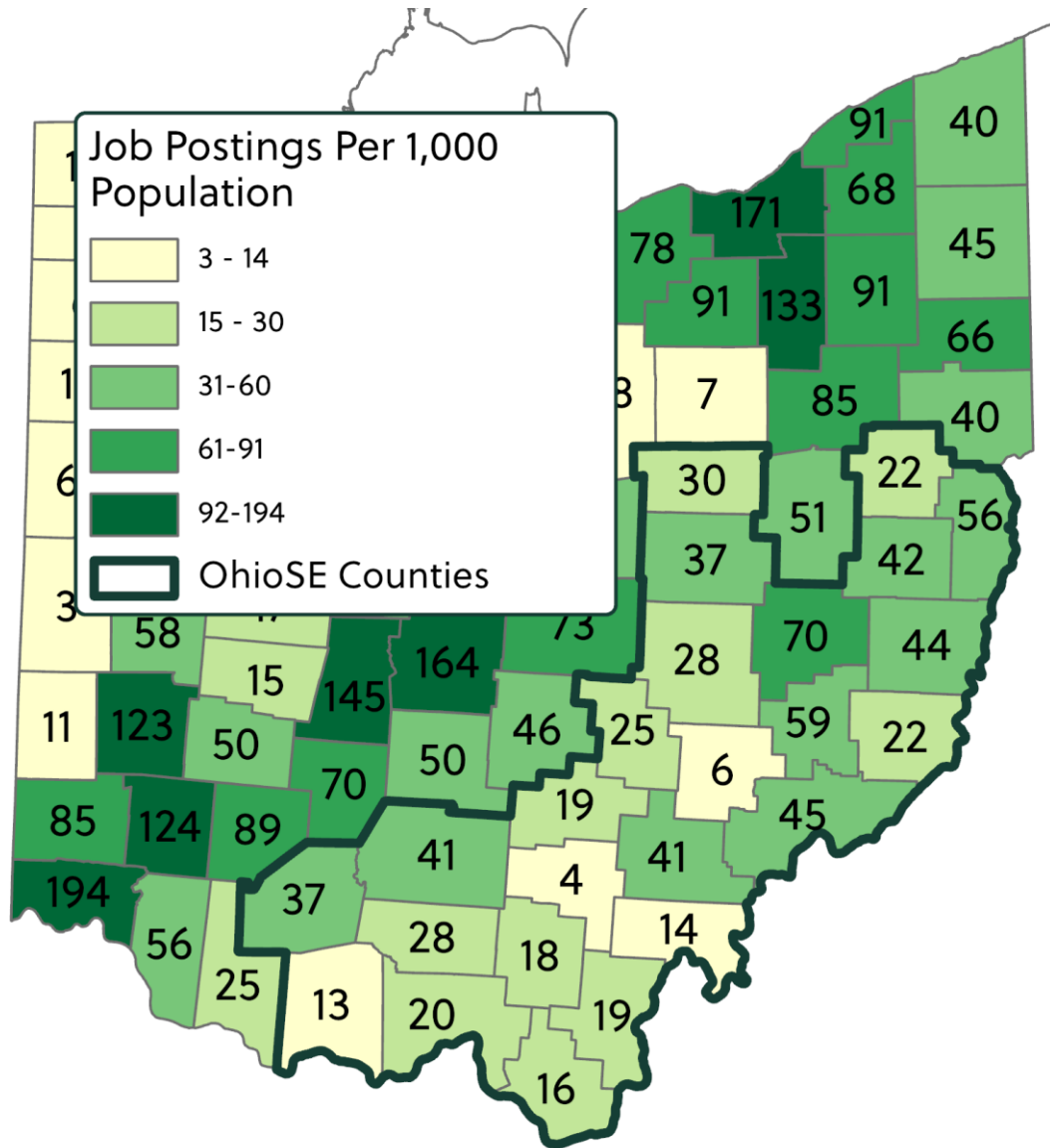
Region	Avg. Median Hourly Wage*	Average Annual Earnings Per Job
OhioSE	\$20.43	\$57,896
United States	\$21.71 (+6.3%)	\$68,624 (+18.5%)



Sources: Lightcast 2023.1, Reference Solutions, OhioSE Research. \*Average of median wages for occupations in food manufacturing (NAICS 311) employed in the OhioSE Region.



# Southeast Ohio's Overlooked **Labor Advantages**



## Less Competition for Workers in OhioSE Region

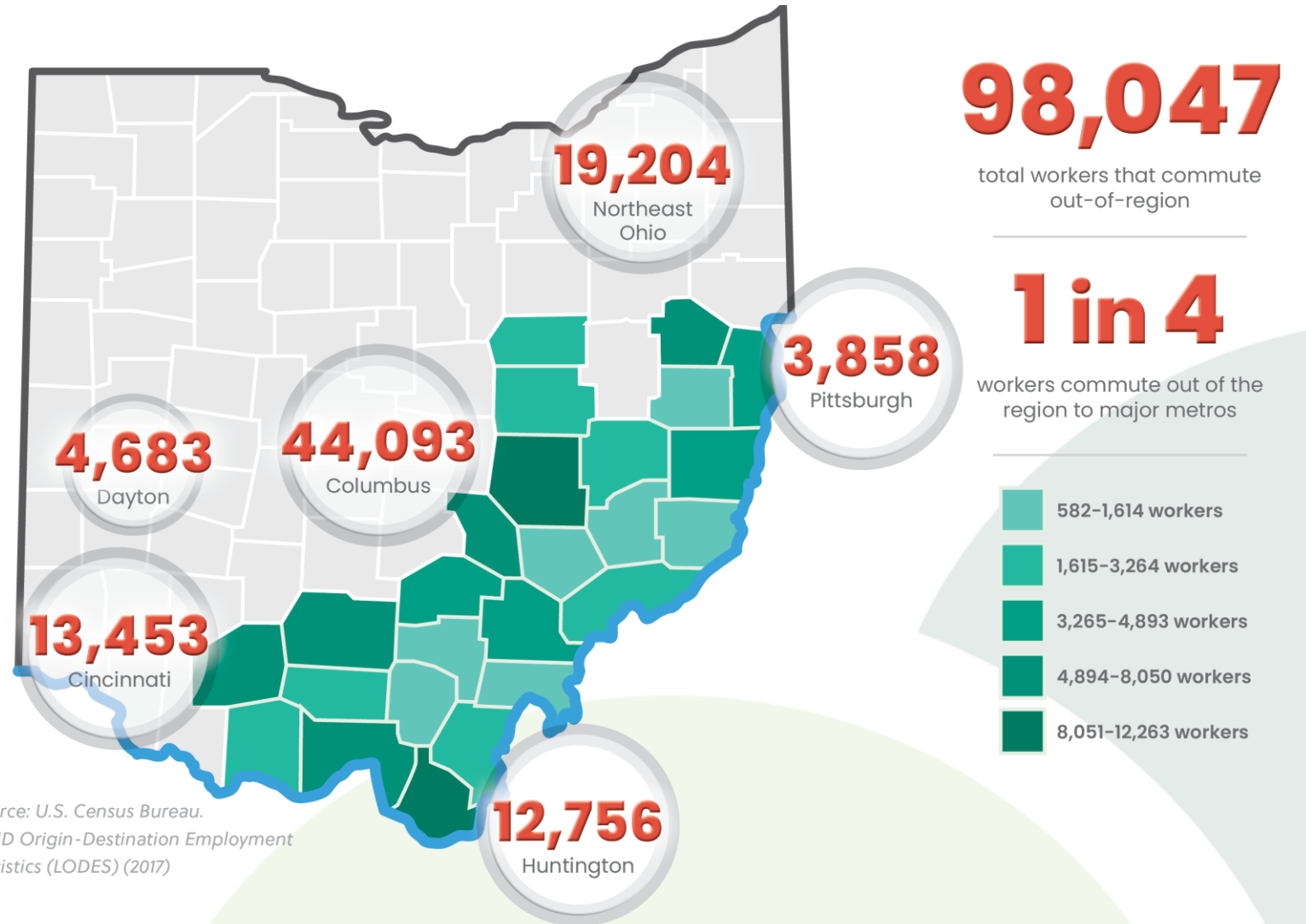
The map lists the number of unique online job postings per 1,000 people living in each county. In some cases, **the number of per capita job openings in the major metro areas is 10x the OhioSE region**. An employer locating in the OhioSE region will experience much less competition for workers.



# A Labor Surplus Region

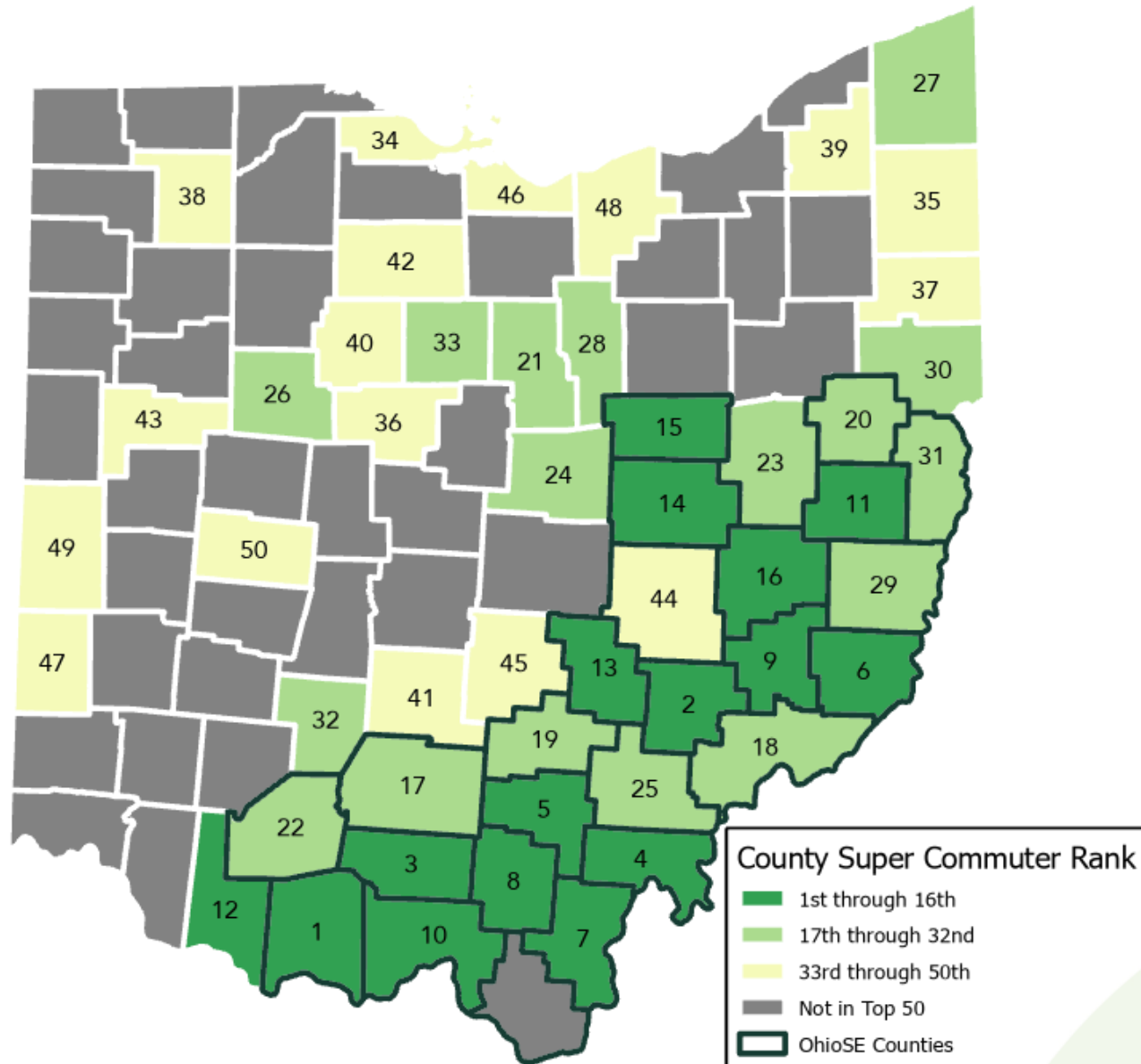
25% of the region's workforce are employed in nearby metro areas, requiring long commutes

Companies offering comparable jobs closer to home could recruit from this talent pool.





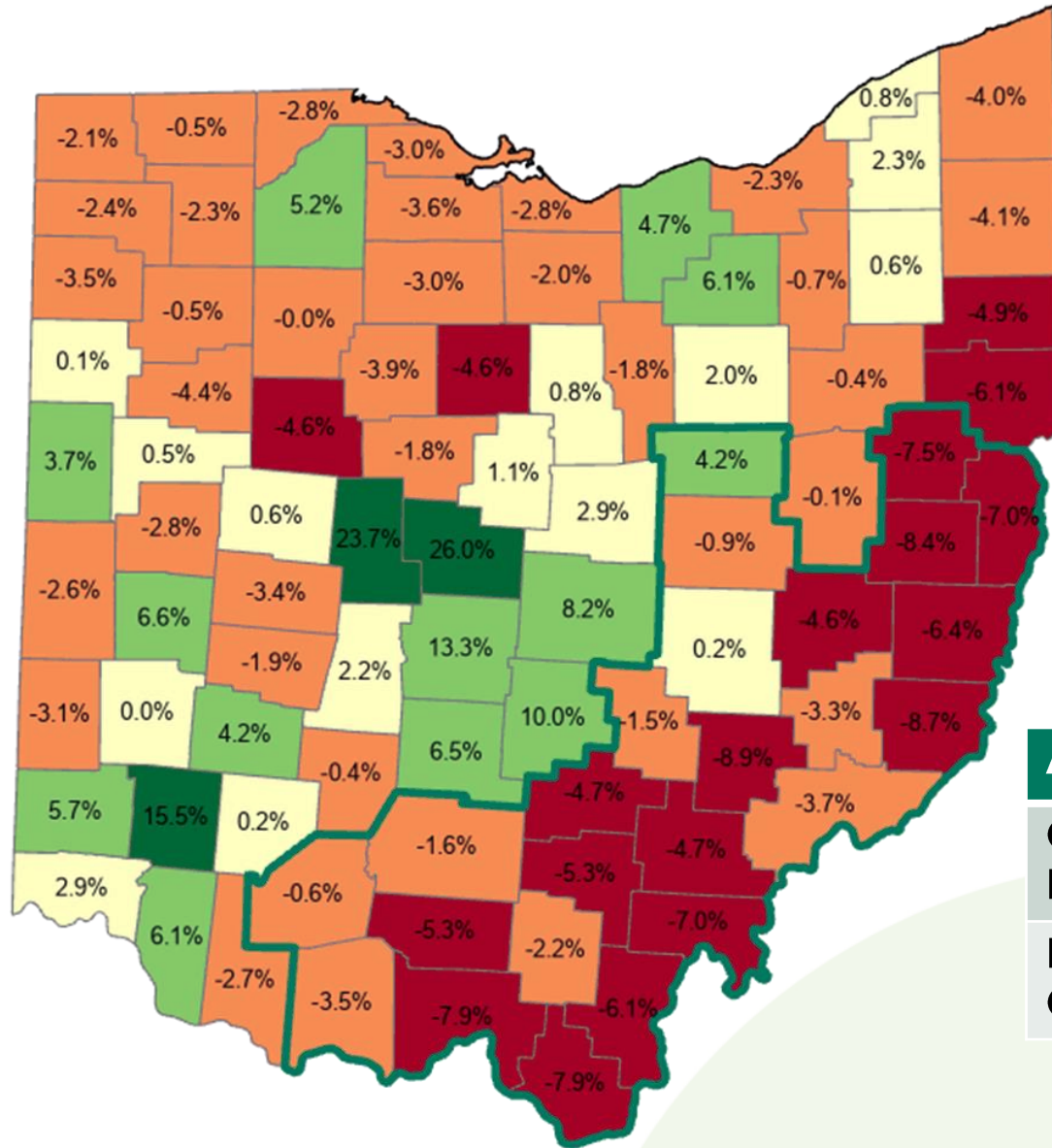
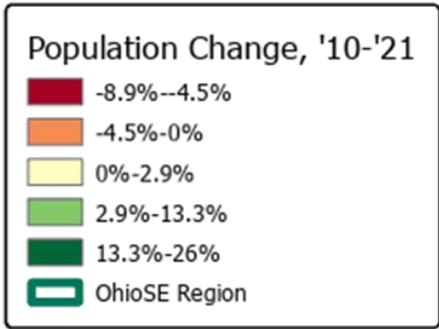
# Southeastern Ohio Workers Dominate “Super Commuter” List



In August, 2022, Stacker published an article, based on data from the U.S. Census Bureau, in which it ranked Counties in Ohio based on the proportion of workers who commuted 90 minutes or more to work (and home again), where the #1 County is the one with the highest proportion of these “Super Commuters”.



# County Population Change, 2010-2021



- This map shows the change in population, in percentage terms, between 2010 and 2021.
- Average change in population:
  - OhioSE Counties: -4.5%
  - Non-OhioSE Counties: +1.2%

Area	'10 Population	'21 Population
OhioSE Region	1,049,376	1,005,694 (-4.2%)
Rest of Ohio	9,868,610	10,774,323 (+2.1%)



# Macroeconomic Dashboard

## People

	Employment	Unemployment Rate	Labor Force Part. Rate	Population	Total Net Migration
Period & Change	↑ Monthly	↓ Monthly	↑ Monthly	↓ Annual	↑ Annual
Timeframe	February 2023	February 2023	December 2022	CY 2022	CY 2020
Value	<b>410,800 (+7,900)</b>	<b>5.4% (-0.2 p.p.)</b>	<b>54.7% (+0.1 pp)</b>	<b>1,002,475 (-0.3%)</b>	<b>+977 (+1,663)</b>
Ohio Metric	5,528,800	4.4%	61.2%	11,834,714	-7,384

## Prosperity

	GRP Per Capita	Industry Employment	Manufact. Productivity	Manufact. Job Growth	Total Regional Wages
Period & Change	↑ Annual	↑ Annual	↑ Annual	↑ Annual	↑ Annual
Timeframe	CY 2022	CY 2022	CY 2022	CY 2022	CY 2022
Timeframe Figure	<b>\$41,455 (+9.6%)</b>	<b>+1.7% (780 jobs)</b>	<b>+4.3%</b>	<b>+2.3% (942 Jobs)</b>	<b>+2.6%</b>
Ohio Metric	\$66,199	+1.0%	+7.4%	+1.5%	+2.8%

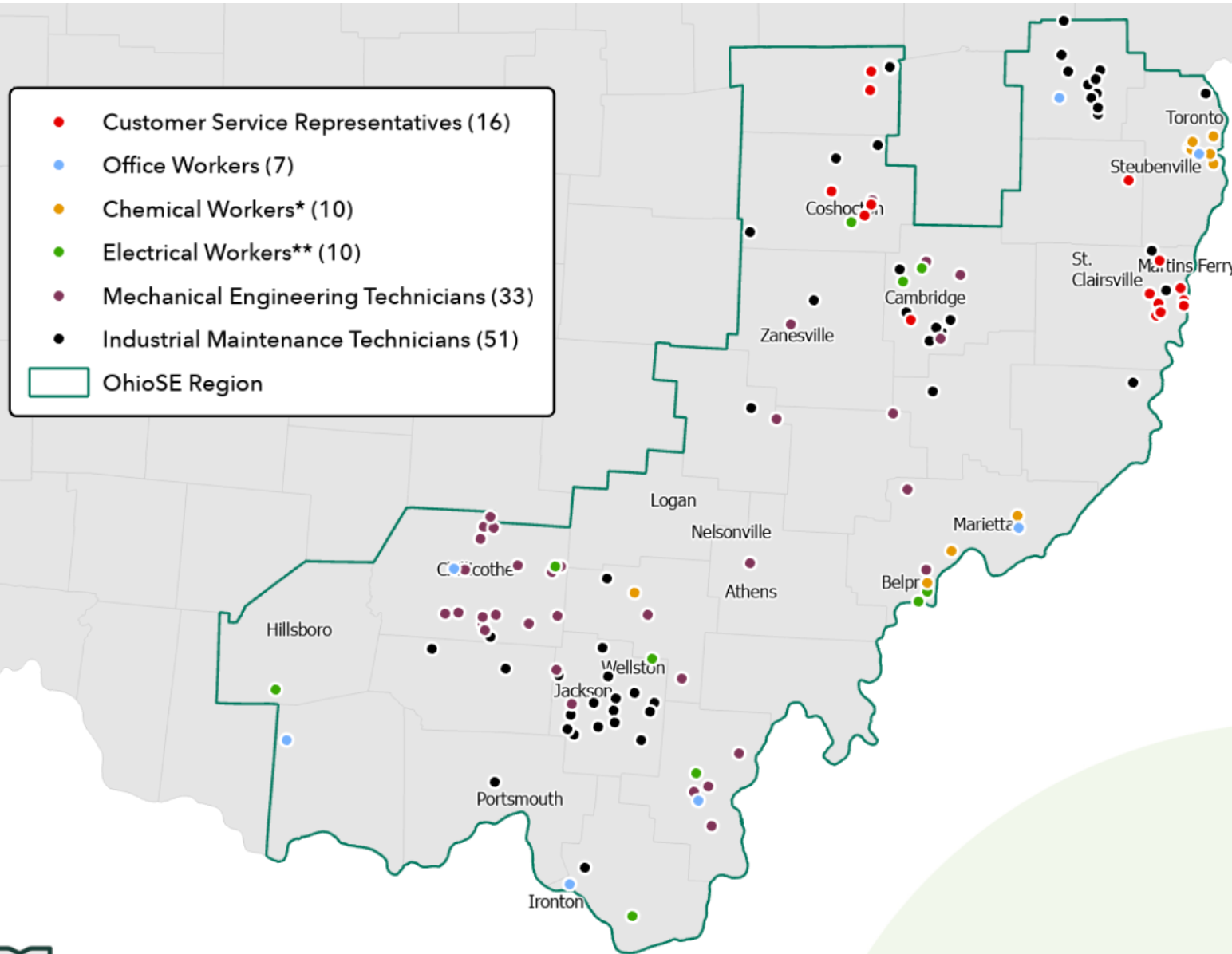
## Potential

	Goods producing Out-commuters	% Associate's or Higher	Business Establishments	Job Postings	White Collar Jobs
Period & Change	Annual	↑ Annual	↓ Annual	↑ Quarterly	↑ Annual
Timeframe	CY 2019	CY 2022	CY 2020	Q1, 2023	2022
Timeframe Figure	<b>-0.35% (131 workers)</b>	<b>27.3% (+0.7 p.p.)</b>	-1.2%	<b>+53.9% (YoY)</b>	+1.1%
Ohio Metric	N/A	39.3%	-0.4%	-4.7%	+0.24%





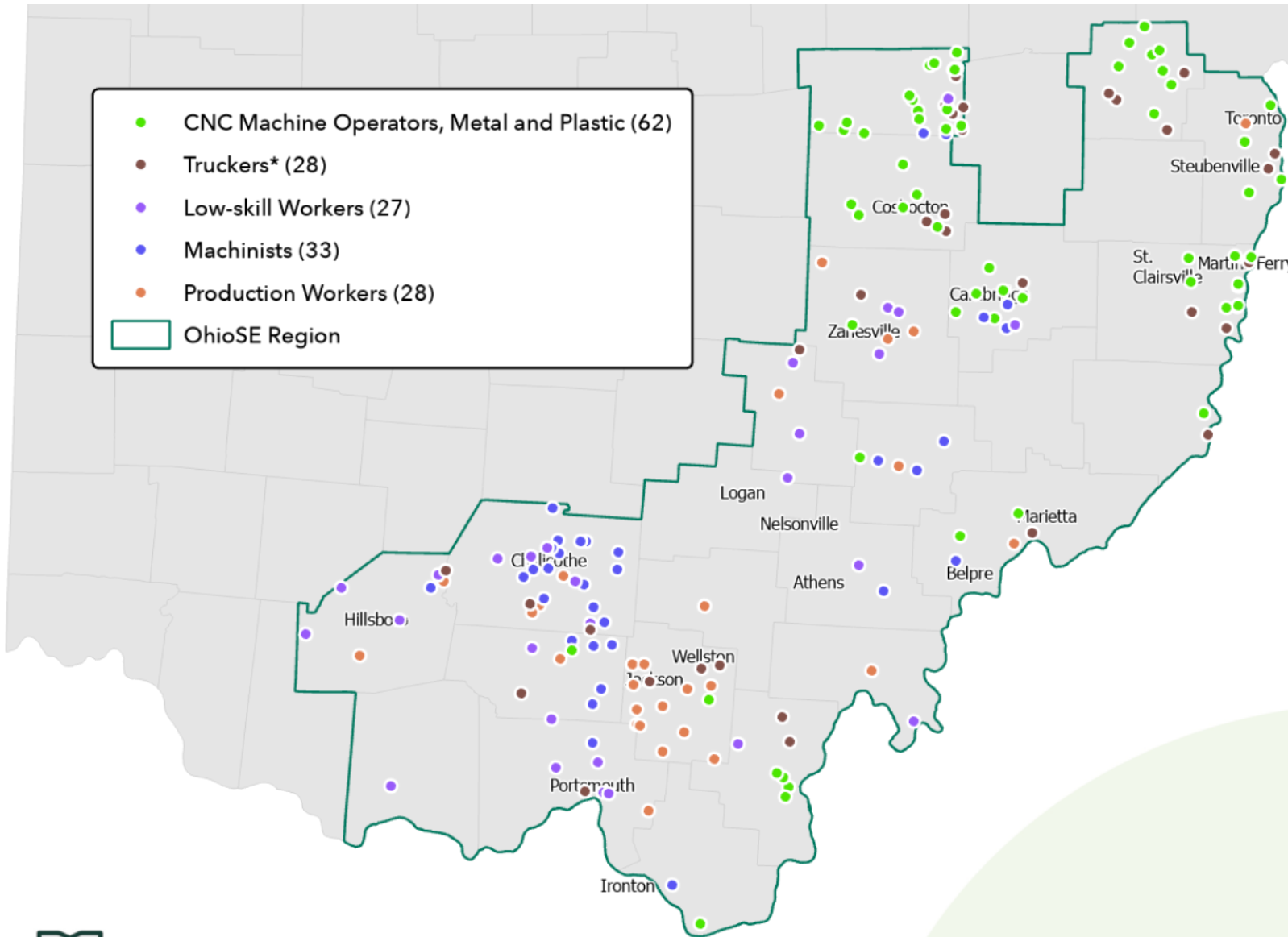
# In-Demand Jobs 2022, Map 1



- This map plots the jobs that are most in-demand in each zip code in the region (zip boundaries not shown).
- Each dot represents one instance in which the occupation was mentioned as an in-demand occupation in a BR&E with a company in the region in 2022 (396 total BR&Es).
- Dots do not reflect the number of workers each company needs for each occupation—**companies may need >1 worker from each occupation.**
- The values in parentheses are the number of times each dot appears on the map (not all dots are visible at this zoom level).



# In-Demand Jobs 2022 Map 2



- In many BR&Es, employers did not provide specific job titles but may have mentioned a need for low-skill and/or production workers, with some overlap in needs among those employers.
- Manufacturing wages in the region are lower than in the Columbus area:



# Trainings vs. Openings Mismatches in Region

## Common Training Completions

Degree/Certificate Completion	Number
Business Administration and Management, General	1,332
Applied Engineering	159
Welding Technology/Welder	139
Electrician	71
Plastics and Polymer Engineering Technology/Technician	23
Industrial Mechanics and Maintenance Technology/Technician	21
Computer Numerically Controlled (CNC) Machinist Technology/CNC Machinist	4
Metal Fabricator	1
<b>Total</b>	<b>1,750</b>

## Most Common Production Openings

Position	Openings
Laborers and Freight, Stock, Material Movers, Hand	1,016
Stockers and Order Fillers	1006
Miscellaneous Assemblers and Fabricators	608
Maintenance and Repair Workers, General	461
Packers and Packagers, Hand	254
Electricians	198
First Line Supervisors of Production & Oper. Workers	198
Inspectors, Testers, Sorters, Samplers, and Weighers	174
Packaging and Filling Machine Operators and Tenders	162
Welders, Cutters, Solderers, and Brazers	161
Industrial Machinery Mechanics	160
Rolling Machine Setters, Operators, and Tenders	159
Plumbers, Pipefitters, and Steamfitters	133
Machinists	132
Food batchmakers	120
First-Line Supervisors of Mechanics, Installers, Repairers	116
Engine & other machine assemblers	111
Woodworking Machine Setters, Operators, Tenders	102
<b>TOTAL</b>	<b>5,269</b>





# Eastern Ohio Natural Gas Abundance

- PA, OH & WV are producing **over 35 billion CF** a day of natural gas. If the 3 states were a country, they would be the **third largest** natural gas producing nation in the world
- The gas supplies exceed pipeline capacity, which results in **prices below the Henry Hub** national index
- Large natural gas and natural gas liquids users can benefit from these abundant, discounted feedstocks



Trading Hub	\$/mmbtu
NYMEX Last Day Settle Price	\$2.030
Appalachian Index – Dominion Transmission	\$3.600
Appalachian Index – TCO	\$3.96

Source: Market Report from Ohio Oil & Gas Assoc., April 25, 2023

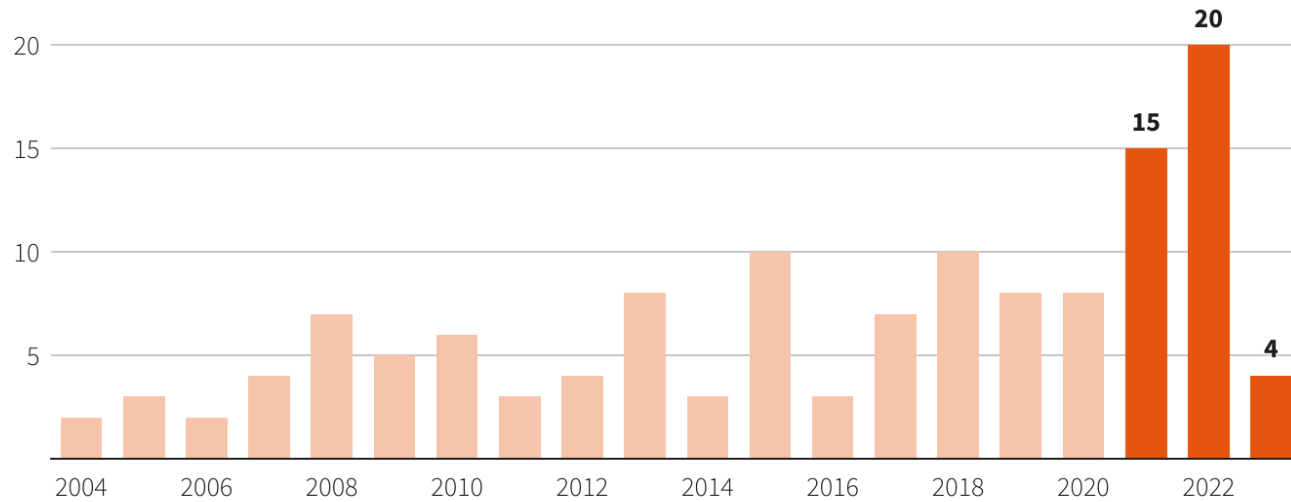


# REUTERS: "US Manufacturing Boom Has a Real Estate Problem"

April 13, 2023, by Timothy Aepfel, Ben Klayman and Nicola Groom

## U.S. manufacturing 'megaproject' land rush

Nearly a third of megaproject projects since 2004 have been unveiled within the last two years.



Note: Megaproject project announcements by year; 2023 figure is through February

Source: fDi Markets courtesy of Global Location Strategies

"... all that new construction has a real estate problem. More specifically, a "megaproject" problem. While the U.S. has plentiful land, there are not that many places to quickly plunk a billion-dollar-plus factory."

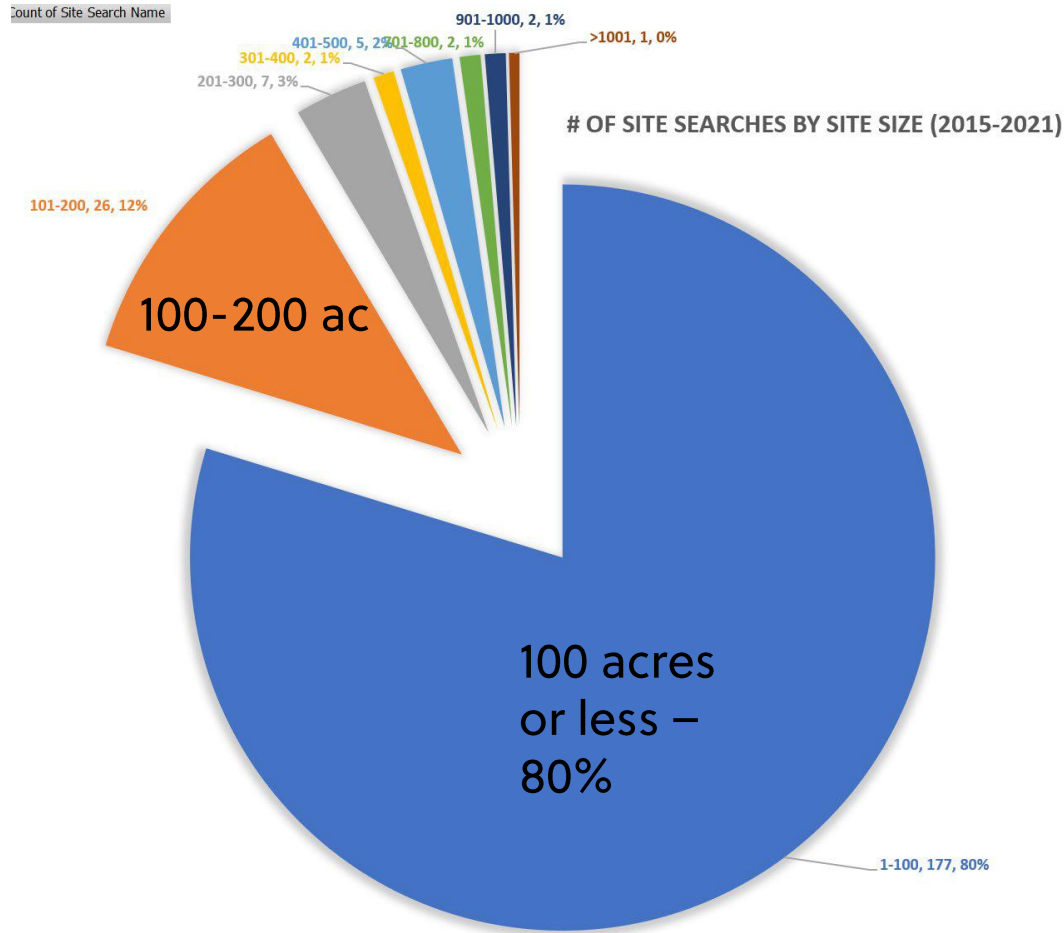
## Industrial 'megaproject' projects since 2018

About half of the 'megaproject' projects since 2004 have been launched in the last five years.

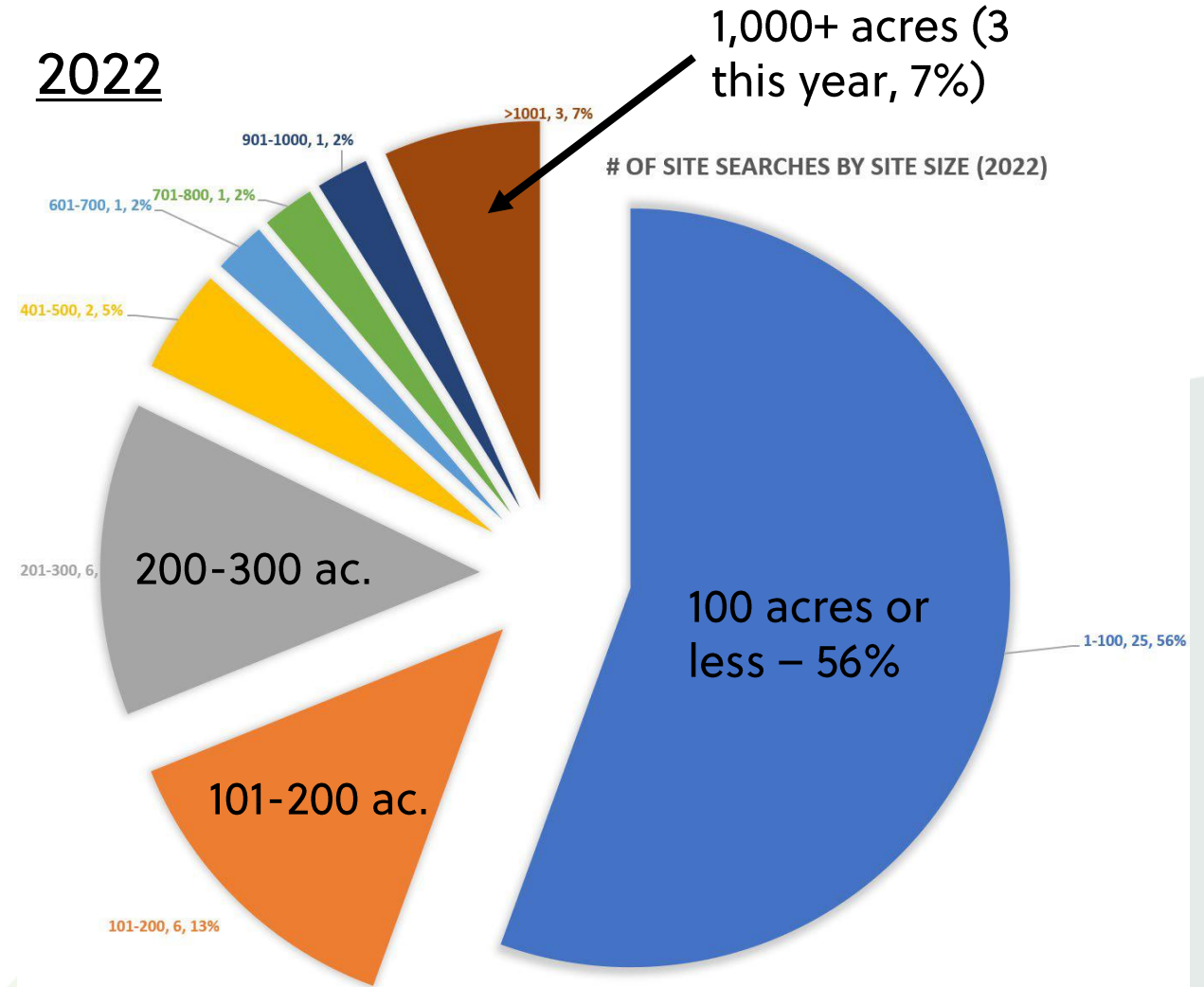


# JobsOhio Site Search Acreage Required (Historic vs. 2022)

## 2015 - 2021



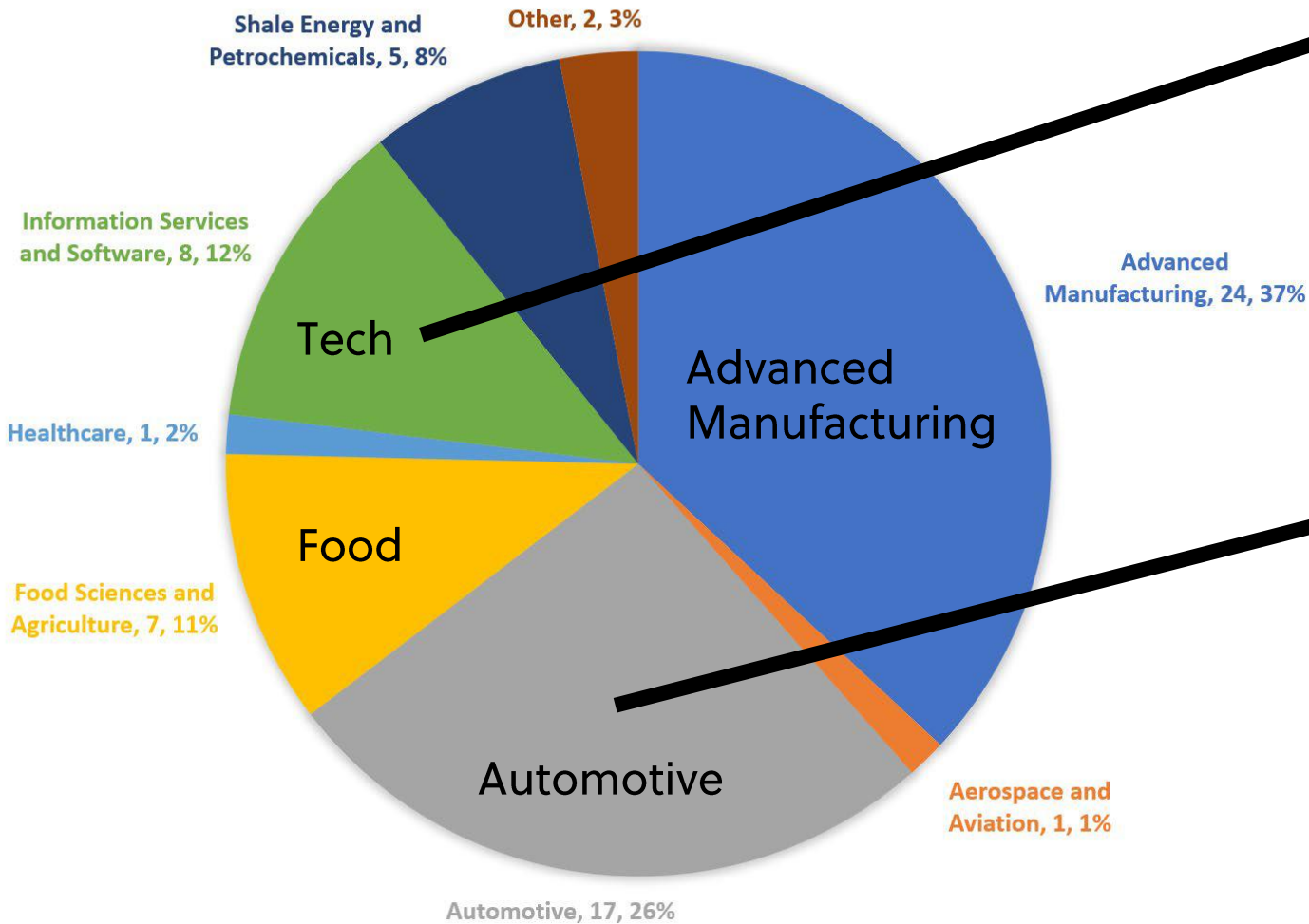
## 2022





# 2022 JobsOhio Site Searches by Sector

JOBSSOHIO LED SITE SEARCHES BY CLUSTER



## Significant Trends

- 3 Semi-conductor Fabs
- 2 Semi-conductor advanced packaging
- 3 other related
- Medians for these projects
  - 1,400 new jobs
  - \$1.2 billion fixed asset investment

## Significant Trends

- 10 for electric vehicle (EV) battery supply chain (two also included vehicle assembly)
- 4 in battery supply chain
- 3 for other components
- 0 for internal combustion engines



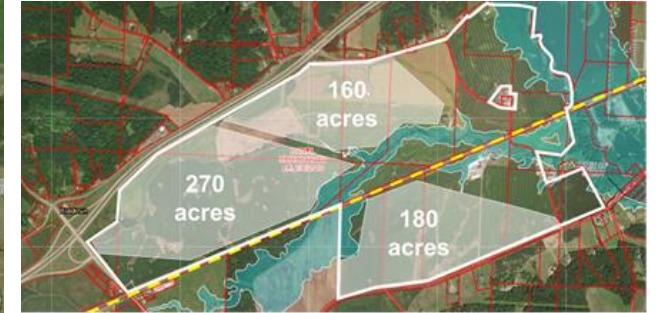
# Large Sites Initiative

## Appalachian Community Grant

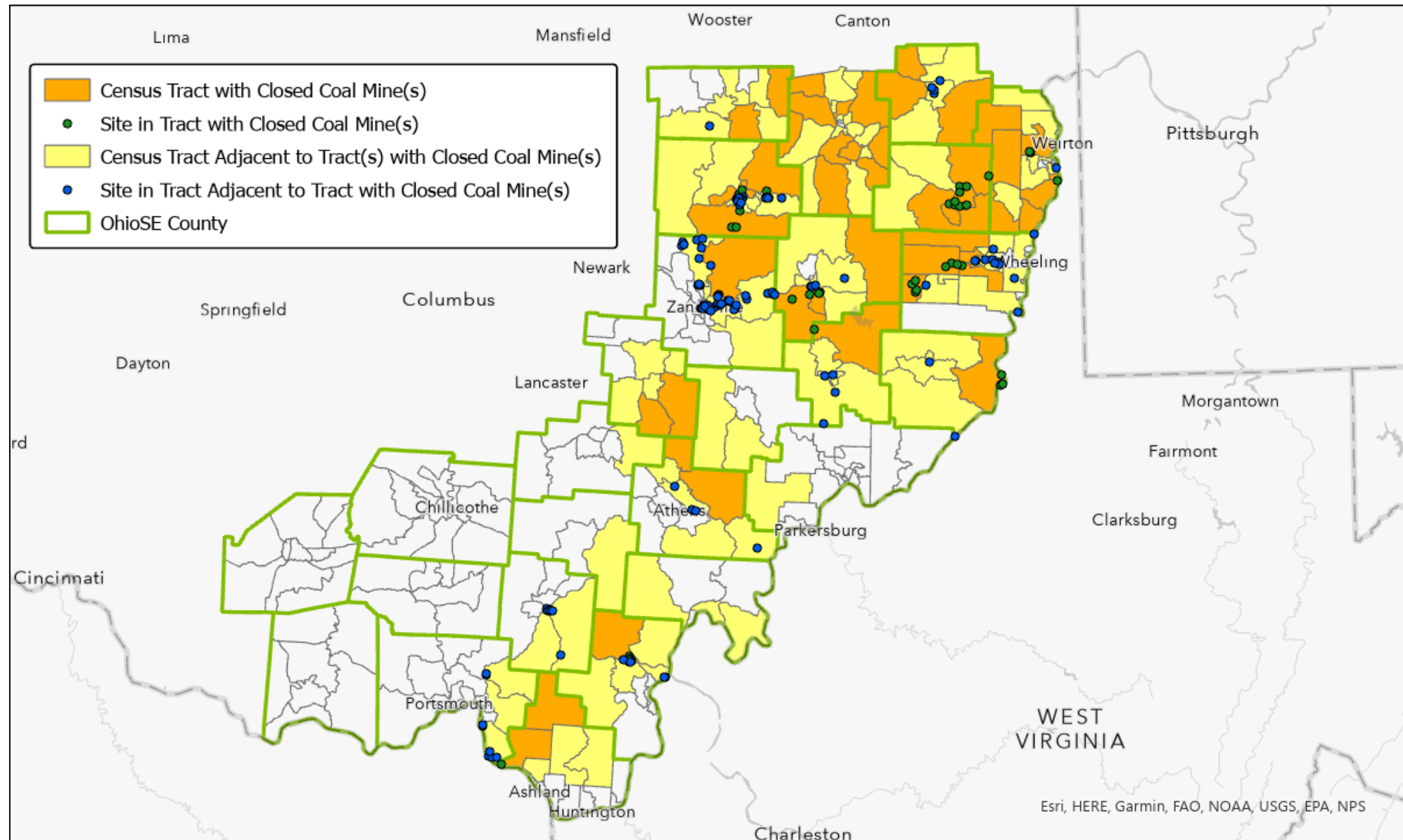
- Large Sites (500 ac. +) infrastructure eligible
- OhioSE awarded services of civil engineers.
- Goal is to complete due diligence and preliminary engineering on up to ten 500+ acres sites in preparation for construction funding applications in November.

## All Ohio Future Fund

- Proposed in State of the State and executive budget. \$500 million in House budget bill for a one-time outlay to prepare potential economic development sites with utilities, roads and other infrastructure statewide so that every Ohioan "will be within commuting distance of at least one of these sites."



# Census Tracts with Closed Coal Mine(s) Since Jan. 1, 2000, And Census Tracts Adjacent to them

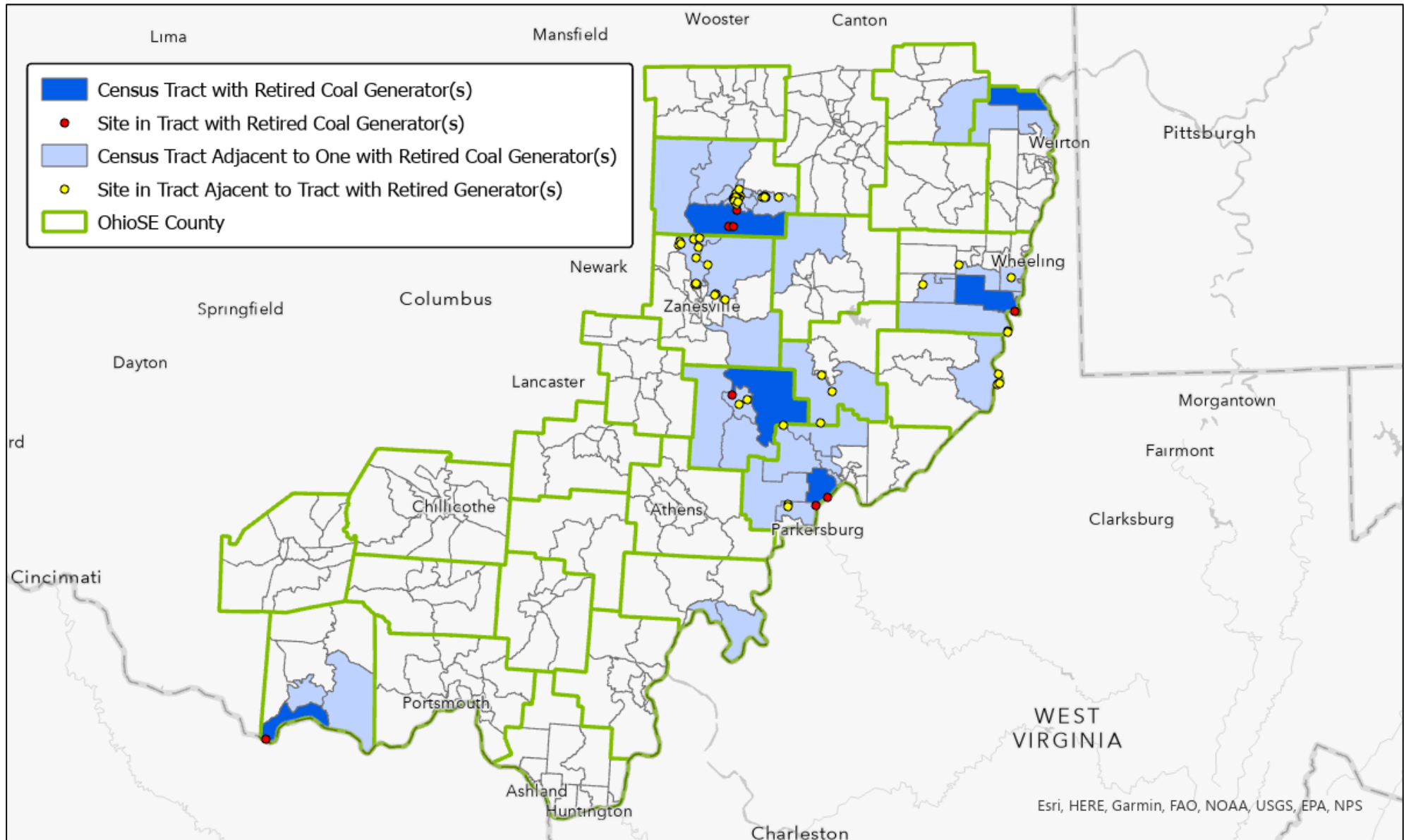


(Tuscarawas County data included for completeness)





# Census Tracts with Retired Coal-fired Generator(s) Since 1/1/2000 (And Census Tracts Adjacent to them)







# OhioSE

ECONOMIC DEVELOPMENT

[www.ohiose.com](http://www.ohiose.com)



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