

COSHOCTON COUNTY PORT AUTHORITY BUSINESS/ INDUSTRIAL PARK STRATEGIC PLAN

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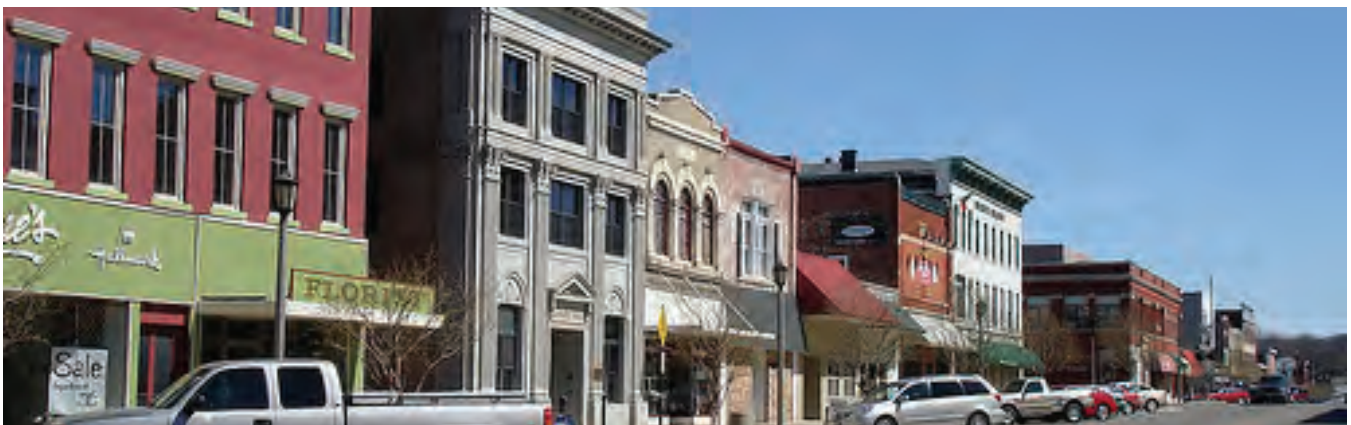
EXECUTIVE SUMMARY

The Coshocton County Port Authority is the lead economic development agency for Coshocton County, the City of Coshocton, the Village of West Lafayette and the unincorporated areas of the County. The Port Authority's primary purpose is to attract jobs to the County and work with its existing industry to expand in the County. The Port Authority is the main point of contact with the Appalachian Partnership for Economic Growth (APEG) and JobsOhio in order to attract new jobs, new investment, and retain jobs in Coshocton County.

Between 2018 and 2025 the Coshocton County Port Authority will focus on these top-line goals:

- 500 new jobs
- Increase the median family income by \$2000
- \$25,000,000 in new payroll
- \$100,000,000 in new capital investment

Coshocton County has a strong history of manufacturing that continues to this day. The County is home to manufacturers such as Kraft Foods, McWane, and AK Steel as well as other manufacturing and transportation companies that provide substantial jobs to the residents of Coshocton County. Manufacturing has a 3.33 location quotient in Coshocton County meaning that the County has a 3.33 times greater concentration of manufacturing than does the rest of the country. The County is home to Roscoe Village, an historic town built on the banks of what was the Ohio-Erie Canal. Roscoe Village is a tourist destination that attracts thousands of visitors each year to transport people back in time to 1830s when the canal, and the shops, hotels and taverns along the Canal were operating and thriving. The County boasts seven school districts: Tri-Valley, Coshocton, Garaway, West Holmes, East Knox, Ridgewood, and Riverview. Coshocton Regional Medical Center, a part of Prime Healthcare, serves the healthcare needs of Coshocton County residents.



Based upon a national, state and local economic analysis, Coshocton County should focus its support to retaining existing industries and the attraction of the following new industry sectors:

- 1. Food manufacturing.** This sector has seen an increase of over 200 employees in the last 5 years, largely due to the presence of Kraft Foods. The abundance of water, sanitary sewer, and land makes Coshocton County ripe to attract additional manufacturers of food products. Coshocton County should support its existing industry in this sector and launch an advertising and marketing campaign to attract new companies in this sector.
- 2. Wood products manufacturing.** This sector is in its early stages but offers the potential for growth as companies establish operations in the county. As of June 2017, this sector employed 95 people with a location quotient of 3.38. Coshocton County's neighbor to the north, Holmes County is very mature in this industry sector with 1,398 employees and a location quotient of 25.80. Coshocton should continue to nurture this industry and provide support, in the form of available land and buildings and transportation access.
- 3. Energy intensive industries.** While not a sector in and to itself, there are industries that use more energy than others. Due to its abundance of water, its location in the Utica Shale region, and the natural gas and oil pipelines running through the County, a strategy should be developed to try to attract energy intensive industries.

On February 22, 2018 Montrose and the Coshocton County Port Authority economic development team conducted 3 listening sessions with elected officials and business and community leaders from across the County. The listening sessions were instructive and provided the Coshocton County Port Authority team and Montrose team the opportunity to understand what the community wants to be. The challenges identified in the listening sessions fit into several different categories:

- Community is struggling with its identity
- Communication needs to improve between Port Authority, Industry and Education
- Existing Industry Support is essential
- Need more sites and buildings to compete
- Skilled labor gap
- Wood manufacturing is a big opportunity

SITE DEVELOPMENT

Through the infrastructure analysis and consultation with Coshocton County Port Authority staff, two sites stand out as market-ready, the Sabic site and the Paper Mill Rd Site. Three additional sites were identified as well for industrial development, Greenfield Site #1, Greenfield Site #2, and the Shelly Materials Site but given their infrastructure needs and the cost involved, they are not market ready and

SABIC (FORMER GE) SITE INFRASTRUCTURE SUMMARY

[illegible]

The cost to make this site job ready is \$2,972,200. The site is 65.11 acres. Spreading the cost of the infrastructure over the site is \$45,648 per acre, a heavy burden for the site to be competitive. Knowing that the site will have to sell for \$25,000 to \$35,000 an acre to be competitive with the industrial parks benchmarked in Muskingum and Tuscarawas Counties, the Port Authority should seek funding through the US Department of Commerce, Economic Development Administration (US EDA) for this infrastructure cost. The Port Authority should seek a grant of \$3,000,000 from US EDA. The Port Authority should seek support from APEG and JobsOhio for this request to US EDA. The US EDA Public Works and Economic Development Assistance Programs provides funds for construction of infrastructure in underserved communities to enable them to be more economically competitive. Funding is awarded on a competitive basis and is done through a rolling application period through the EDA

regional office in Chicago. Awards can range from \$100,000 to \$3,000,000. The grant will cover the cost of infrastructure on the site of \$2,972,000. This allows the owners of the Sabic Property to sell the property for \$25,000 to \$35,000 per acre and realize revenue of \$1,627,750 to \$2,278,850. This also allows the Port Authority to offer an enterprise zone property tax abatement on the property rather than having to implement a Tax Increment Financing District to fund the infrastructure costs. Based on an analysis of projects completed in the benchmarked industrial parks in Tuscarawas and Muskingum Counties, the Port Authority will need to offer 50% to 100% abatement for a period of 10 years. The amount of tax abatement provided should be commensurate with the new job commitment and capital investment commitment of the company locating the Sabic site.

PAPER MILL ROAD SITE INFRASTRUCTURE SUMMARY

The cost to provide infrastructure to the Paper Mill Rd Site is approximately \$770,000.



Plan for funding Paper Mill Rd Site Infrastructure

The cost to make this site job ready is \$770,000. The site is 22.71 acres. Spreading the cost of the infrastructure over the site is \$33,905 per acre, a heavy burden for the site to be competitive. Knowing that the site will have to sell for \$25,000 to \$35,000 an acre to be competitive with the industrial parks benchmarked in Muskingum and Tuscarawas Counties, the Port Authority should seek funding through JobsOhio for this infrastructure cost. The Port Authority should seek a grant of \$500,000 and a loan of \$270,000 from JobsOhio. The Port Authority should seek support from APEG for this request to

JobsOhio. The loan should be structured so that principal and interest payments are made once the property is sold. The grant will bring down the cost of infrastructure burden on the site to \$270,000. Spreading that burden over the 22.71 acres is \$11,889 per acre. This allows the Port Authority to sell the property for \$20,000 to \$25,000 per acre, pay off the loan to JobsOhio, and realize revenue to the Port Authority of \$184,000 to \$297,750. This also allows the Port Authority to offer an enterprise zone property tax abatement on the property rather than having to implement a Tax Increment Financing District to fund the infrastructure costs. Based on an analysis of projects completed in the benchmarked industrial parks in Tuscarawas and Muskingum Counties, the Port Authority will need to offer 50% to 100% abatement for a period of 10 years. The amount of tax abatement provided should be commensurate with the new job commitment and capital investment commitment of the company locating the Paper Mill Rd site.

ECONOMIC IMPACT OF NEW PROJECTS AND PARK DEVELOPMENT

In total, the potential impact of the newly developed industrial parks and the construction of five new facilities will have a total direct impact of \$796.3 million and support 3,010 jobs. The business-to-business spending will have a potential impact of \$176.3 million and support 1,459 additional jobs. The potential impact of the employee/household spending is \$144 million and an additional 1,228 jobs. This project has an output multiplier effect of 1.40, meaning there is an additional .40 cents added to the economy for every \$1 in investment.

COSHOCTON PORT AUTHORITY ECONOMIC DEVELOPMENT ACTION PLAN STEPS

In addition to funding infrastructure for the Sabic Site and Paper Mill Rd site, the Coshocton Port Authority should implement the following five action plan tactics.

- 1.** Coshocton Port Authority should implement an existing industry support program to provide expansion and workforce assistance by:
 - a.** Developing a list of companies to visit on an annual basis
 - b.** Investigate using a BR&E Software
 - c.** Assisting with identifying and procuring project financing, state and local incentive programs
 - d.** Providing government procurement assistance
 - e.** Conducting wage & benefit surveys
 - f.** Forming a Manufacturer's Roundtable

2. Coshocton Port Authority should leverage APEG and JobsOhio to launch an attraction and marketing campaign aimed at food processing companies by:
 - a. Redevelop the Port Authority web site to better promote the County, define the Port Authority as the economic development organization for the County.
 - b. Attend food processing industry trade shows and events with APEG and JobsOhio
 - c. Utilize APEG and JobsOhio vast network of food processing companies with operations and headquarters in Ohio.
 - d. Identify and approach the top 50 food processing companies in the United States about the benefits of locating in the County.
 - e. Internet/website and social media efforts to coordinate advertisements and direct contact campaign through social media sites such as LinkedIn, Google, Twitter, Facebook and industry trade association sites to drive traffic to the Port Authority website.
 - f. Participating with APEG and JobsOhio in targeted trade association events such as the Industrial Asset Management Council, Site Selectors Guild and CoreNet events which are populated by national corporate site location consultants.
 - g. Direct mail campaigns to launch a targeted direct mail campaign communicating the County's benefits to select companies in food processing.
3. Coshocton Port Authority should engage wood manufacturers in the County and in neighboring counties to understand their transportation needs to help them grow by:
 - a. Setting up one-on-one meetings with wood manufacturers in Coshocton County.
 - b. Meeting with economic development officials in Holmes County to understand how they have addressed the needs of wood manufacturers.
 - c. Developing a Coshocton Wood Manufacturer Council to allow for an exchange of ideas between the companies.
 - d. Identifying buildings in Coshocton that would allow wood manufacturers to expand and grow operations.
 - e. Working with the County Engineer to identify the most heavily traveled transportation routes and determining what steps are needed to improve those routes.





- 4.** Coshocton Port Authority should work with its education partners to establish an occupational marketing campaign to provide a pipeline of manufacturing workers by:

 - a.** Identifying workforce and industry partners to develop a skills gap/human resources committee to specifically monitor, address and provide programming for the community's existing skills gap.
 - b.** Promoting manufacturing and transportation jobs amongst middle and high-school guidance counselors, teachers and students as well as with those seeking work in the region.
 - c.** Create and distribute a workforce survey to area manufacturers to identify the specific occupations where a skills gap exists.
 - d.** Coordinate with existing industry, various school districts, and Central Ohio Technical College to develop internships and apprenticeships programming.
 - e.** Bus tours of manufacturers in Coshocton County for students, parents, teachers and guidance counselors.
 - f.** Raising funds from area companies, local governments and the state of Ohio to create a pool of funding that students can use for scholarships at Coshocton County educational institutions and apprenticeships at local businesses.
 - g.** General education and marketing of students, parents, teachers, and guidance counselors through social media, traditional media, and outreach in the schools.
- 5.** Coshocton Port Authority should launch a fundraising campaign to attract additional public and private sector dollars to the organization by:

 - a.** Establishing a fundraising committee within the Board of Directors
 - b.** Developing a fundraising goal that is realistic and can be applied to the economic development efforts of the Coshocton Port Authority.
 - c.** Using the Coshocton Port Authority Business/Industrial Park Strategic Plan as a basis to approach existing and new investors to take ownership of the Action Plan and become stewards in its success through 2025.
 - d.** Expand the Fundraising Committee to include outside local business and community leaders with influence in economic development.
 - e.** Setting up focus groups and one-on-one interviews with new and prospective investors to gauge their level of interest in investing in Coshocton Port Authority.

NATIONAL AND STATE ECONOMIC ANALYSIS

ECONOMY

The economic development of Coshocton County is tied to the economic conditions of the United States, state of Ohio, Coshocton County and its communities. What constitutes the economy, whether the economy is growing, and what industries are growing all impact the development of a comprehensive economic development strategic plan. There are numerous economic metrics that provide insight into what the economic make-up is and what industries are succeeding.

A review of current economic data illustrates mixed results for the nation and the Midwest Region. America remains the world's largest economy and has pushed back, at least for now, China's economic surge to take the top spot. National economic growth is slowing but many regions of the U.S. remain in an economically strong position with steady economic growth, unemployment, employee compensation, real estate values and personal income. Inflation remains low which helps challenges with relatively low wage growth. Finance and insurance, durable goods manufacturing, and information services are all growing industries. On the global front, America is experiencing rising trade deficits but increasing Foreign Direct Investments. Travel and tourism and energy production is down across the Country.

American economic growth continued heading into the fourth quarter of 2017 but not at the pace hoped for. Key data points related to the current performance of the U.S. economy include the following:

- The United States' \$18 trillion economy constitutes nearly 25% of the global economy and is the world's largest followed by China at \$11 trillion constituting 14.8% of the global economy according to the World Bank.
- Real gross domestic product (GDP) increased at an annual rate of 2.5 % in the fourth quarter of 2017, according to the "second" estimate released by the Bureau of Economic Analysis. In the third quarter, real GDP increased 3.2 %.
- Personal income increased \$64.7 billion (0.4 %) in January according to estimates by the Bureau of Economic Analysis. Disposable personal income (DPI) increased \$134.8 billion (0.9 %) and personal consumption expenditures (PCE) increased \$31.2 billion (0.2 %).
- Real GDP increased in every state and the District of Columbia in the third quarter of 2017, according to statistics on the geographic breakout of GDP by the U.S. Bureau of Economic Analysis. Real GDP by state growth in the third quarter ranged from 5.7 % in Delaware to 0.5 % in South Dakota.

- For the nation, 17 of 21 industry groups increased in the third quarter according to the Bureau of Economic Analysis. Finance and insurance, durable goods manufacturing, and information services were the leading contributors to national economic growth:
 - ◊ Finance and insurance increased 14.7 % nationally and contributed to growth in every state and the District of Columbia.
 - ◊ Durable goods manufacturing increased 7.5 % nationally—the sixth consecutive quarter of growth.
 - ◊ Information services increased 9.0 % nationally.
- State personal income increased 0.7 % on average in the third quarter of 2017, according to estimates by the Bureau of Economic Analysis. Personal income increased 1.0 % in Washington, faster than in any other state. Texas had the next largest increase at 0.9 %. South Dakota, New Mexico, Nebraska, Kansas, and Iowa had the slowest increases in personal income.
- State PCE grew on average 4.0 % in 2016, the same rate as in 2015, according to statistics by the Bureau of Economic Analysis. In 2016, PCE growth ranged from 0.2 % in North Dakota to 6.2 % in Utah. After Utah, the states with the fastest growth in PCE were Colorado, Hawaii, and Idaho. Utah and Colorado were also among the fastest growing states in 2015. After North Dakota, the states with the slowest PCE growth were Wyoming, Oklahoma, and Alaska.
- According to recent Census Bureau reports, national real estate vacancy rates in the fourth quarter 2017 were 6.9 % for rental housing and 1.6 % for homeowner housing. The rental vacancy rate of 6.9 % was virtually unchanged from the rate in the fourth quarter 2016 (6.9 %) and 0.6 percentage points lower than the rate in the third quarter 2017 (7.5 %). The homeowner vacancy rate of 1.6



% was 0.2 percentage points lower than the rate in the fourth quarter 2016 (1.8 %) and virtually unchanged from the rate in the third quarter 2017 (1.6 %). The homeownership rate of 64.2 % was not statistically different from the rates in the fourth quarter 2016 (63.7 %) or the third quarter 2017 (63.9 %).

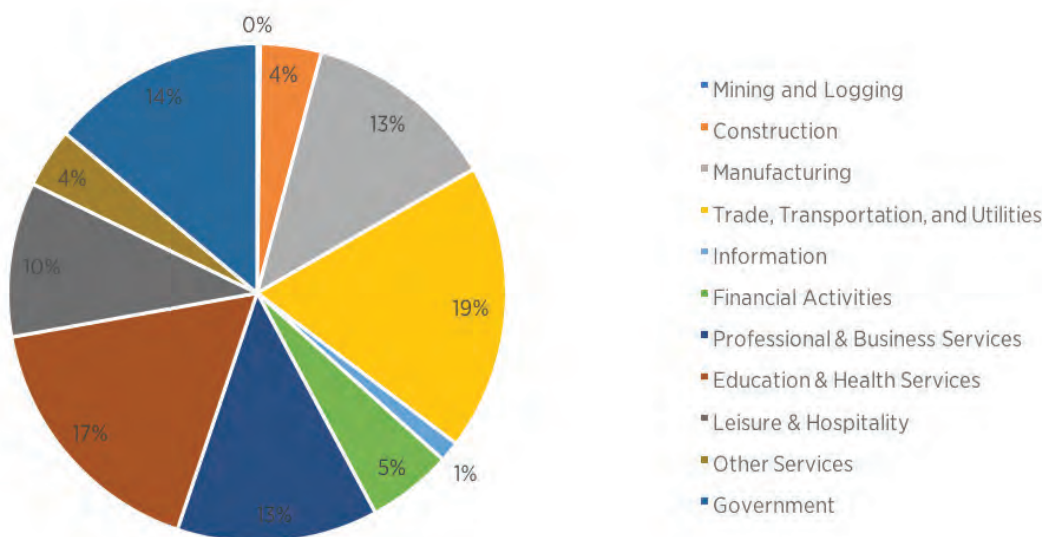
- In 2016, U.S. nonfarm businesses invested \$1,575.7 billion in new and used structures and equipment, a decrease of \$66.3 billion (4.0 %) from the revised 2015 total of \$1,642.0 billion according to the Census Bureau. Total spending on new structures and new equipment was \$1,462.4 billion, a decrease of \$68.6 billion (4.5 %) from the revised 2015 total of \$1,531.0 billion.
- The Consumer Price Index for All Urban Consumers (CPI-U) increased 0.5 % in January on a seasonally adjusted basis according to the U.S. Bureau of Labor Statistics. Over the last 12 months, the all items index rose 2.1 % before seasonal adjustment. The seasonally adjusted increase in the all items index was broad-based, with increases in the indexes for gasoline, shelter, apparel, medical care, and food all contributing.
- Compensation costs for civilian workers increased 0.6 %, seasonally adjusted, for the 3-month period ending in December 2017 according to the U.S. Bureau of Labor Statistics. Wages and salaries (which make up about 70 % of compensation costs) increased 0.5 %, and benefits (which make up the remaining 30 % of compensation) increased 0.5 %.
- Total nonfarm payroll employment increased by 200,000 in January, and the unemployment rate was unchanged at 4.1 % according to the U.S. Bureau of Labor Statistics with employment continued to trend up in construction, food services and drinking places, health care, and manufacturing.
- The Producer Price Index for final demand increased 0.4 % in January, seasonally adjusted according to the U.S. Bureau of Labor Statistics.
- Nonfarm business sector labor productivity growth was revised to 0.0 % in the fourth quarter of 2017 according to the U.S. Bureau of Labor Statistics, as output increased 3.2 % and hours worked increased 3.3 %, and annual average productivity increased 1.2 % from 2016 to 2017.
- Real average hourly earnings for all employees decreased 0.2 % from December to January, seasonally adjusted, according to the U.S. Bureau of Labor Statistics due to a 0.3- % increase in average hourly earnings offset by a 0.5- % increase in the Consumer Price Index for All Urban Consumers (CPI-U).
- U.S. import prices increased 1.0 % in January according to the U.S. Bureau of Labor Statistics, after rising 0.2 % in December based upon higher prices for both nonfuel imports and fuel imports contributed to the January advance. Prices for U.S. exports rose 0.8 % in January following a 0.1- % increase the previous month.
- Based upon a strong dollar, the U.S. trade deficit in 2017 increased to \$566 billion.

- Expenditures by foreign direct investors to acquire, establish, or expand U.S. businesses totaled \$373.4 billion in 2016 according to the Bureau of Economic Analysis. Spending was down 15 percent from \$439.6 billion in 2015 but was above the annual average of \$350.0 billion for 2014-2015 and was well above the annual average of \$226.0 billion for 2006-2008. As in previous years, expenditures to acquire existing businesses accounted for a large majority of the total.

OHIO ECONOMIC OUTLOOK

A review of the Ohio economy involves understanding the state's industry size and make up, its income performance, unemployment rate, demographic strengths and weaknesses. Ohio's has the seventh largest economy among the fifty states with a \$608.1 B GDP as measured in 2015. Pennsylvania ranked 6th in GDP of states and New Jersey as 8th. If it were a country, Ohio's economy would be the 21st largest in the world—just below Saudi Arabia. On a per capita basis, Ohio's GDP of \$52,363 ranked 26th largest in the nation in 2015. Among its neighboring states, only Pennsylvania ranked higher than Ohio, with per capita GDP of \$53,831 (23rd). Over the last decade, average annual economic growth in most of Ohio's neighboring states was faster than in Ohio, including West Virginia where GDP growth averaged 3.3% per year, Pennsylvania (3.2%), Indiana (3.1%), and Kentucky (3.0%). Michigan was the only neighboring state with slower GDP growth than that of Ohio, at an average of 1.6% per year. Ohio's economy when reviewed by industry illustrates an economy not nearly as dominated by the manufacturing industry as had existed in the past.

OHIO JOBS BY INDUSTRY SECTOR, MARCH 2017

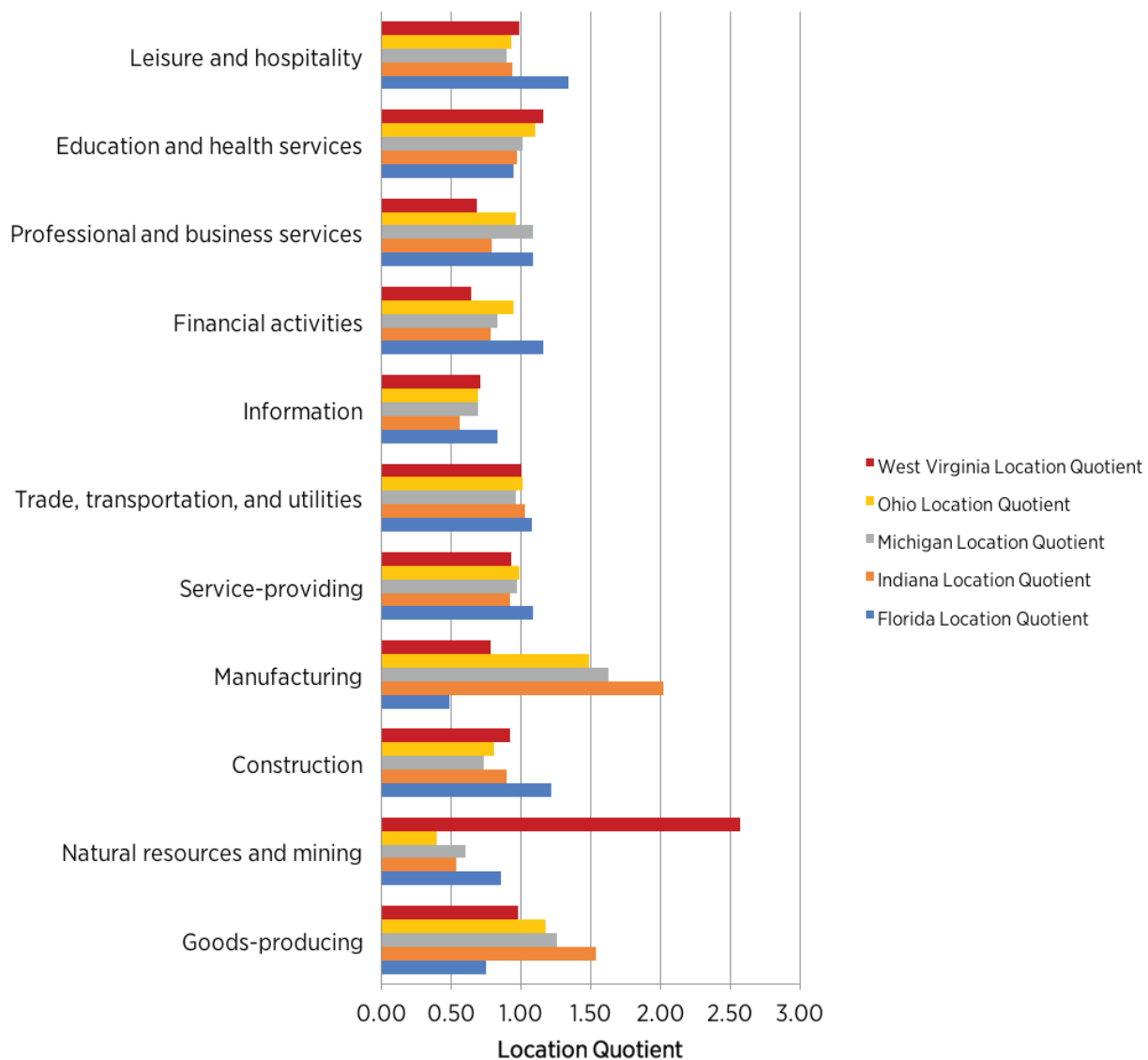


Source: US Bureau of Labor Statistics

As measured by the Bureau of Labor Statistics, trade, transportation and utilities, education and health care, government and professional service jobs all have more jobs in Ohio than the manufacturing sector. State and Regional economies grow through the retention, expansion, and attraction of like, growing industries already located in a region. This is measured by a review of the industry cluster and location quotient for the success of these clusters. An industry cluster comprises of a geographic concentration of firms within a particular industry. It includes core firms and other organizations who can contribute to the industry's competitive success. Location quotient is an indicator of the economic concentration of a certain industry in a state, region, county or city compared to a base economy, such as a state or nation. A location quotient greater than 1 indicates a concentration of that industry in the area. A location quotient greater than 1 typically indicates an industry that is export oriented. An industry with a location quotient of 1 with a high number of jobs present is likely a big exporter and is bringing economic value to the community feeding the retail trade and food services sectors. The location quotient is an indicator of past success but is also a harbinger of future success.



LOCATION QUOTIENT COMPARISON



Source: US Bureau of Labor Statistics

As illustrated in the chart above, Ohio leads states in trade, transportation and utilities, manufacturing and goods producing industries but does not keep pace with neighboring Indiana or Michigan and is far behind Florida in professional and business services and financial activities.

How Ohio compares to other states from an economic standpoint is a highly relevant topic for any economic development strategic plan. Reviewing demographic data is a strong starting point for measuring economic. Regions with an increasing population base and a group of younger workers illustrate growing communities. Homeownership rates and home value illustrate stability in a community but also whether it is affordable to buy a home in a community. The %age of citizens over 25 with a college degree

illustrates the likelihood the region can attract high-wage financial services, insurance, health care, high-tech, professional service and other advanced services white collar jobs. Finally, measures of income and poverty rates illustrate the overall economic strength of the community. Utilizing a demographic benchmark comparison, Ohio illustrates weak population growth and has a slightly higher than average senior population illustrating the challenge the state has in retaining a younger generation of worker compared to the national average and regional competitors. Ohio's homeownership rates are above the national average but trail competitors such as West Virginia and Florida. Ohio's median home value is far below the national average illustrating the affordability of housing in the state.

OHIO DEMOGRAPHIC BENCHMARK STATE COMPARISON

People	Indiana	Michigan	West Virginia	Florida	Ohio	U.S.
Population Gains 2010-16	2.3	0.4	-1.2	9.6	0.7	4.7
Persons over 65	14.6	15.8	18.2	19.4	15.9	14.9
Homeownership Rate	69.0	71.0	72.5	65.3	66.3	63.9
Median Home Value	124,200	122,400	103,800	159,000	129,900	178,600
Bachelor's degree	24.1	26.9	19.2	27.3	26.1	29.8
Median Household Income	49,255	49,576	41,751	47,507	49,429	53,889
Poverty Rate	14.5	15.8	17.9	15.7	14.8	13.5

Source: U.S. Census Bureau

Unemployment rates hit a new recent low nationally to 4.4% in September of 2017. Unfortunately, Ohio had the fourth highest unemployment rate among the states in September of 2017 at 5.3%.

COSHOCTON COUNTY ECONOMIC, DEMOGRAPHIC, INDUSTRY CLUSTER, AND WORKFORCE ANALYSIS

Coshocton County, Ohio is a shrinking Ohio county, like many rural counties in Ohio, but it has substantial economic, demographic and community assets. The County has a strong history of manufacturing that continues to this day. The County is home to manufacturers such as Kraft Foods, McWane, and AK Steel as well as other manufacturing and transportation companies that provide substantial jobs to the residents of Coshocton County. The County is home to Roscoe Village, an historic town built on the banks of what was the Ohio-Erie Canal. Roscoe Village is a tourist destination that attracts thousands of visitors each year to transport people back in time to 1830s when the canal, and the shops, hotels and taverns along the Canal were operating and thriving. The County boasts seven school districts: Tri-Valley, Coshocton, Garaway, West Holmes, East Knox, Ridgewood, and Riverview. Coshocton Regional Medical Center, a part of Prime Healthcare, serves the healthcare needs of Coshocton County residents. Central Ohio Technical College, in conjunction with Muskingum University holds classes in Montgomery Hall, which is adjacent to Roscoe Village. This facility includes 15 classrooms, laboratory space, lecture hall, nursing lab, distance learning classroom and community room. The nascent woodworking industry in the northern part of Coshocton County is having an unexpected positive impact on the economy of the County.

Coshocton County Asset Inventory

- Industry strength in manufacturing, food processing, and woodworking
- Above average homeownership rate and low poverty rate
- Roscoe Village
- Central Ohio Technical College
- Nascent Woodworking Industry
- Utica Shale



INDUSTRY CLUSTER ANALYSIS

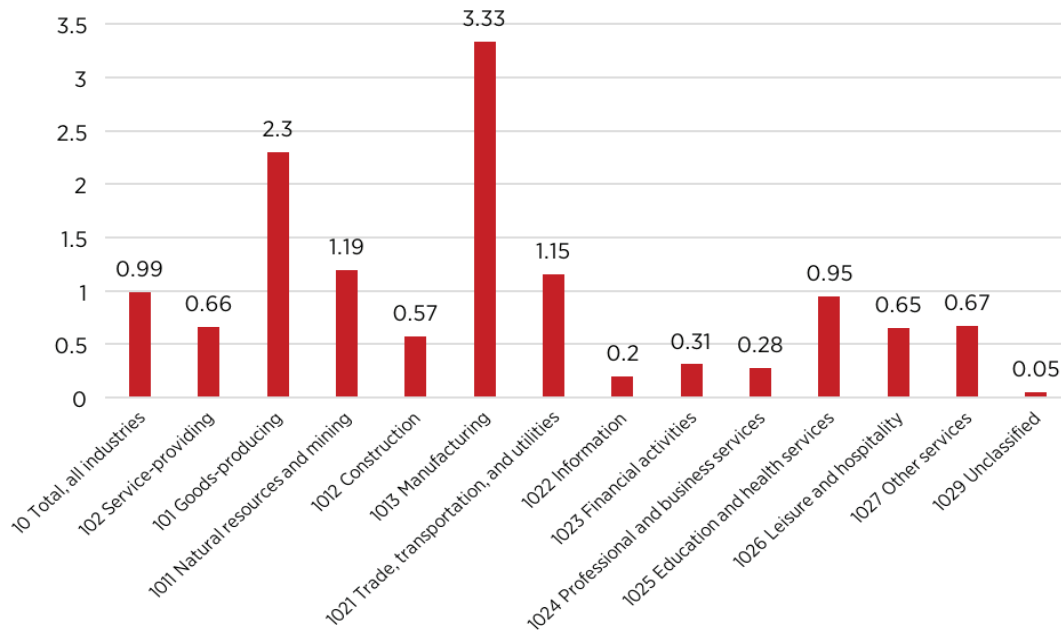
The Coshocton County's employment sector is largely made up of companies in the manufacturing, trade, transportation and utilities, and education and health services sectors. These industries provide the majority of the jobs to residents of the County and provide a glimpse of what industries the Coshocton County Port Authority should market to for future growth.

TOP 10 COSHOCTON COUNTY EMPLOYERS

Major Employers (U=Union)	Approx. #	Type
McWane / Clow Water Systems(U)	466	Pipe
Kraft Foods Inc(U)	450	Bacon
Oxford Mining(U)	450	Miner
AK Steel Holding Corp MFT(U)	420	Steel
Coshocton County Memorial Hospital(U)	366 Ft / 146 Pt	Serv.
Coshocton County Government (U)	364 Ft / 79 Pt	Govt.
American Electric Power Co(U)	302	Utility
River View Local Schools(U)	263 Ft / 33 Pt	Govt.
Coshocton City Schools(U)	223	Govt.
Ohio Central Railroad(U)	200	RR
Wal-Mart	172 Ft / 116 Pt	Retail
Annin Flagmakers	150 Ft / 75 Pt	Flags

Coshocton County has a high location quotient in manufacturing, natural resources and mining, and trade, transportation and utilities. This is evident from the list of the county's largest employers but is telling for the economic future of Coshocton County. A location quotient is a method of using Federal industry cluster data to identify the economic concentration of a certain industry in a state, region, county or city compared to a base economy, such as a state or nation. A location quotient greater than 1 indicates that a locality, in this case Coshocton County, has a higher concentration of companies in an industry sector than does the rest of the nation. Manufacturing has a 3.33 location quotient in Coshocton County meaning that the County has a 3.33 times greater concentration of manufacturing than does the rest of the country. The second largest industry cluster by this measure is natural resources and mining with a location quotient of 1.19. This is not surprising given the presence of oil gas wells in the County related to the Utica Shale deposit. The third largest industry cluster by the measure of location is trade, transportation and utilities with a location quotient of 1.15. AEP has a large presence in the County that gives credence to this number.

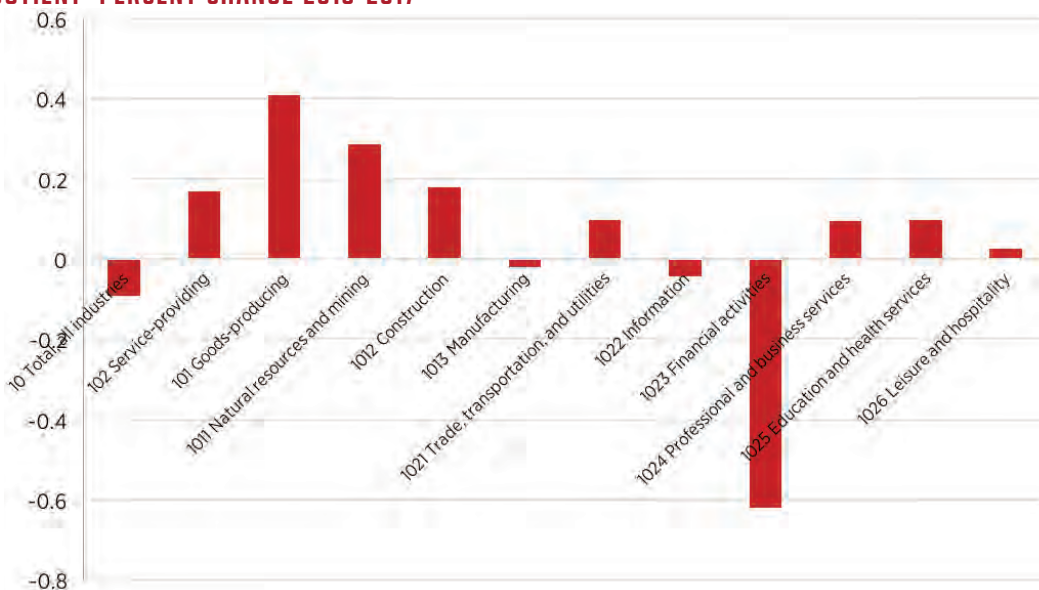
COSHOCTON COUNTY LOCATION QUOTIENT RELEVANT TO US



Source: US Bureau of Labor Statistics

The percentage change in location quotient shows the industries that are growing and declining relative to the national trend. Goods-Producing industries that include natural resources and mining, construction, and manufacturing increased their location quotient in Coshocton County since 2013. Although manufacturing has the highest location quotient overall, it has a negative percentage change since 2013. This is likely due to the closure of the Rock Ten facility in the fall of 2015.

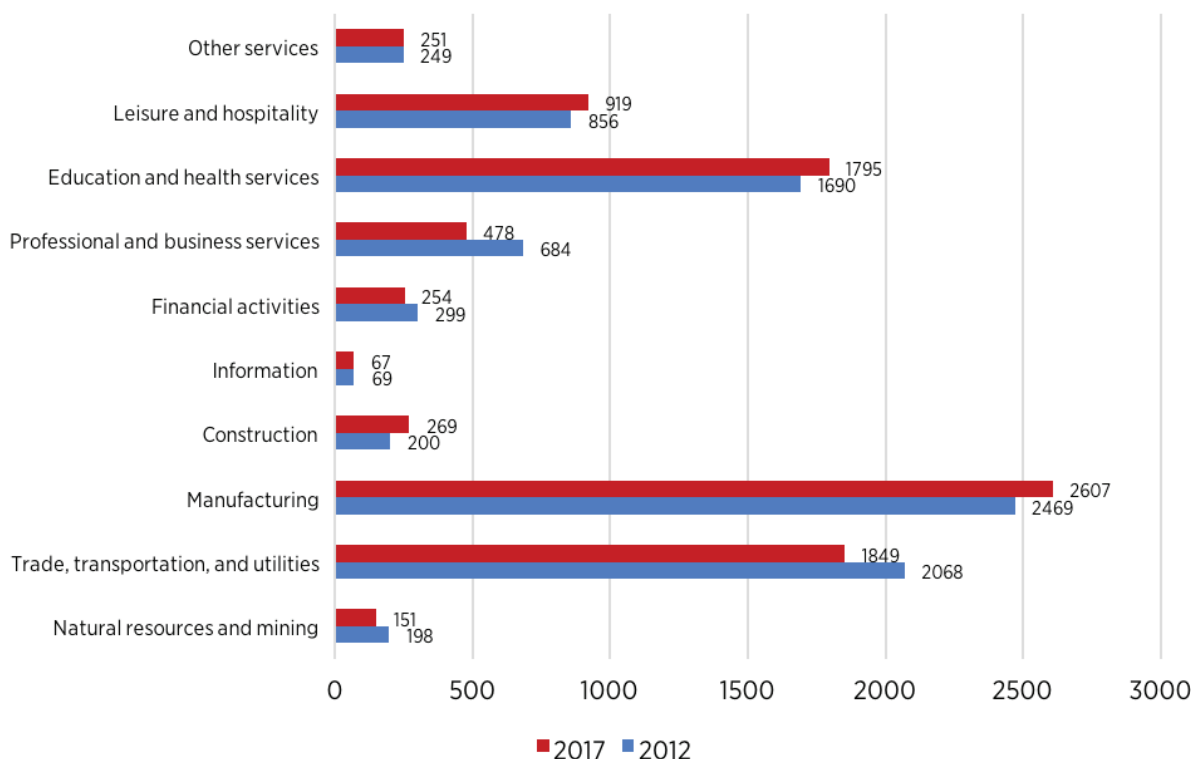
LOCATION QUOTIENT PERCENT CHANGE 2013-2017



Source: US Bureau of Labor Statistics

Overall employment in Coshocton County declined from 2012 to 2017. Jobs declined 141 positions in that timeframe. Even with the exit of Rock Ten, the manufacturing sector saw a slight increase in jobs. As is the case with most rural communities in Ohio, the education and health services sector saw an increase. Professional and business services saw the largest decrease in employment from 2012-2017. Trade, transportation and utilities, and natural resources and mining, both stalwarts of the Coshocton economy lost employees from 2012 to 2017. These losses were not large from a percentage perspective and have the opportunity to grow over the decade with the growth in manufacturing and the energy sector.

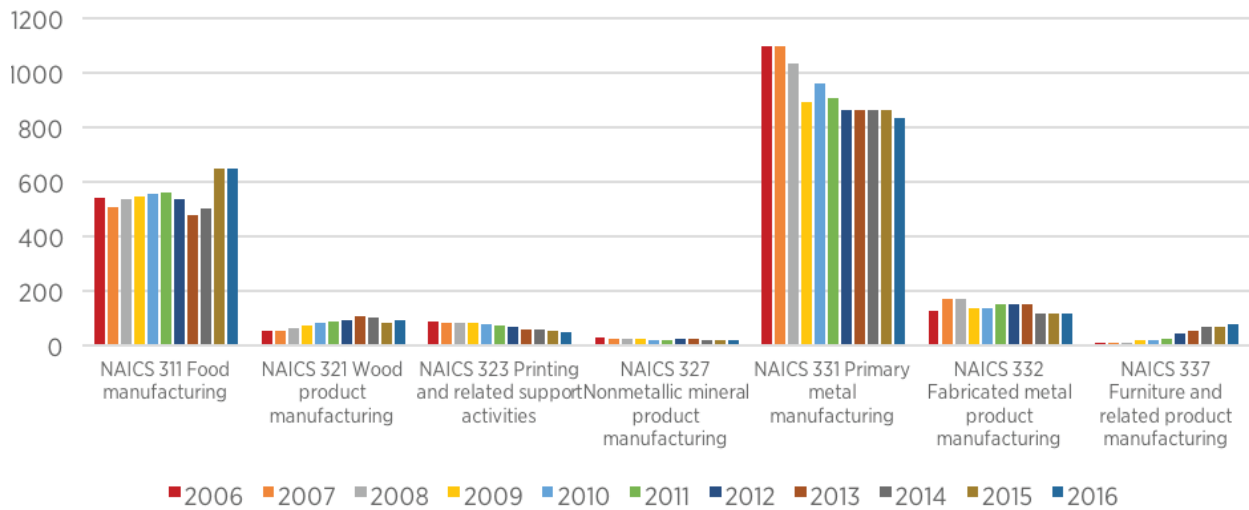
COSHOCTON COUNTY EMPLOYEES BY INDUSTRY SECTOR



Source: US Bureau of Labor Statistics

The manufacturing sector is the largest sector in the County as shown by its location quotient. A breakdown of the sector reveals that the largest subsector is primary metal manufacturing followed by food manufacturing. This sector along with wood products manufacturing experienced growth during the last decade.

MANUFACTURING



Source: US Bureau of Labor Statistics

Based upon a national, state and local economic analysis, Coshocton County should focus its support to retaining existing industries and the attraction of the following new industry sectors:

1. **Food manufacturing.** This sector has seen an increase of over 200 employees in the last 5 years, largely due to the presence of Kraft Foods. The abundance of water, sanitary sewer, and land makes Coshocton County ripe to attract additional manufacturers of food products. Coshocton County should support its existing industry in this sector and launch an advertising and marketing campaign to attract new companies in this sector.
2. **Wood products manufacturing.** This sector is in its early stages but offers the potential for growth as companies establish operations in the county. As of June 2017, this sector employed 95 people with a location quotient of 3.38. Coshocton County's neighbor to the north, Holmes County is very mature in this industry sector with 1,398 employees and a location quotient of 25.80. Coshocton should continue to nurture this industry and provide support, in the form of available land and buildings and transportation access.
3. **Energy intensive industries.** While not a sector in and to itself, there are industries that use more energy than others. Due to its abundance of water, its location in the Utica Shale region, and the natural gas and oil pipelines running through the County, a strategy should be developed to try to attract energy intensive industries.

COSHOCTON COUNTY ATTRACTION INDUSTRY SECTORS

Industry	NAICS
Food Products	311
Paper and Allied Products	322
Chemical Manufacturing	Parts of 325
Glass and Glass Products	3272
Cement and Lime	32731 and 32741
Iron and Steel	3311
Aluminum	3313
Petroleum Refining	32411

WORKFORCE ANALYSIS

A region's workforce is a critical measure of its economic success. The retirement of the Baby Boom generation and a lack of alignment between industry and higher education are creating widespread shortages in qualified workforce even in times of high unemployment. Regions that are successful with the retention of a high-quality workforce start with a strategy of targeting good jobs using initial upfront training and job-matching services and create support for workers such as childcare and transportation networks plus financial incentives for companies that take such an approach. An examination of a community's workforce includes a review of its size, unemployment rate, education level, occupations and earnings levels.

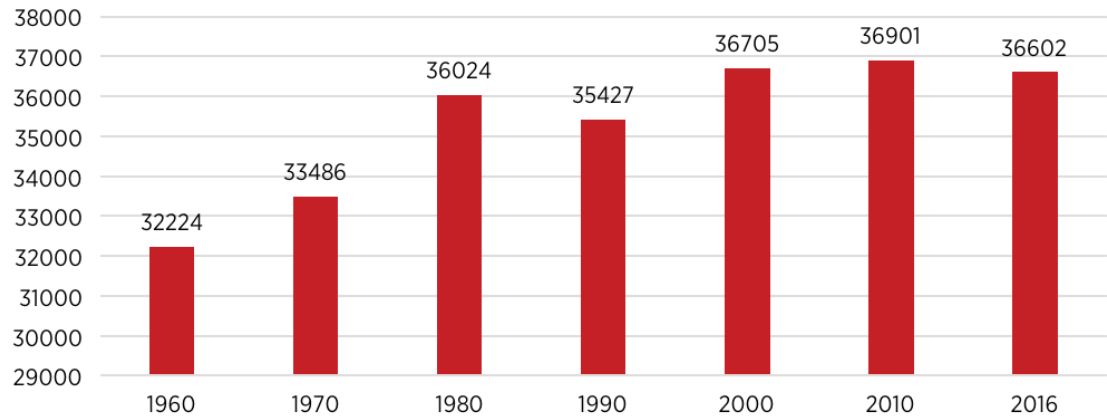
COSHOCTON COUNTY DEMOGRAPHIC PROFILE

People	Ohio	Coshocton County, Ohio	U.S.
Population Growth 2010-16	0.7%	-0.8%	4.7%
Persons 65 years and over	15.9%	18.4%	14.9%
Homeownership Rate	66.3%	74.7%	63.9%
Median Home Value	\$129,900	\$97,100	\$178,600
Median Household Income	\$49,429	\$43,380	\$53,889
Poverty Rate	14.8%	12.7%	13.5%

Source: U.S. Census Data

With an estimated population of 36,602 in 2016 Coshocton ranks 67 out of Ohio's 88 counties in terms of population. The County saw most of its population growth between 1960 and 1980. The good news for Coshocton County is that its population has largely kept pace over the last 25 years and not lost a considerable amount of population. On the down side, the county has not added population since the 1990s.

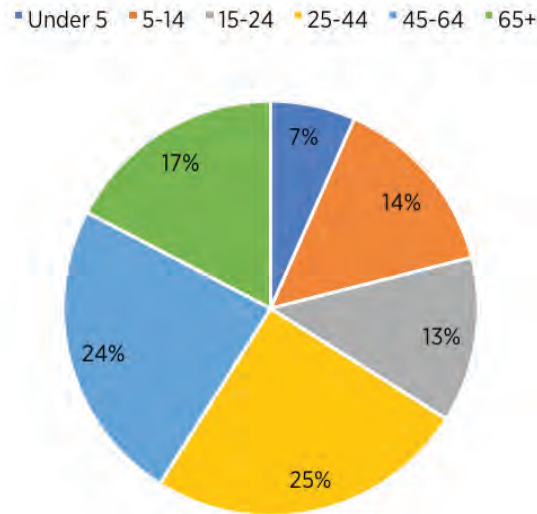
COSHOCTON COUNTY POPULATION OVER TIME



Source: U.S. Census Data

Coshocton County’s workforce has a strong demographic range of those people that are in their working years, with a clear majority of workers, over 50%, in the prime 25-64 age range. The availability of a workforce primed for employment based upon age is a major advantage for any region and one that many nations struggle to address. In addition, regions need a pipeline of future workers with a strong student age population. This workforce pipeline creates an opportunity for communities to grow not just through the import of workers from other regions but through the retention of their student population to remain following the completion of school or technical training. For Coshocton County the pipeline of population younger than 25 is not keeping pace with those between 25 and 64. Like most rural counties, Coshocton County is not keeping enough of its young people and those that live in the County are not producing enough new citizens to keep pace.

COSHOCTON COUNTY POPULATION BY AGE



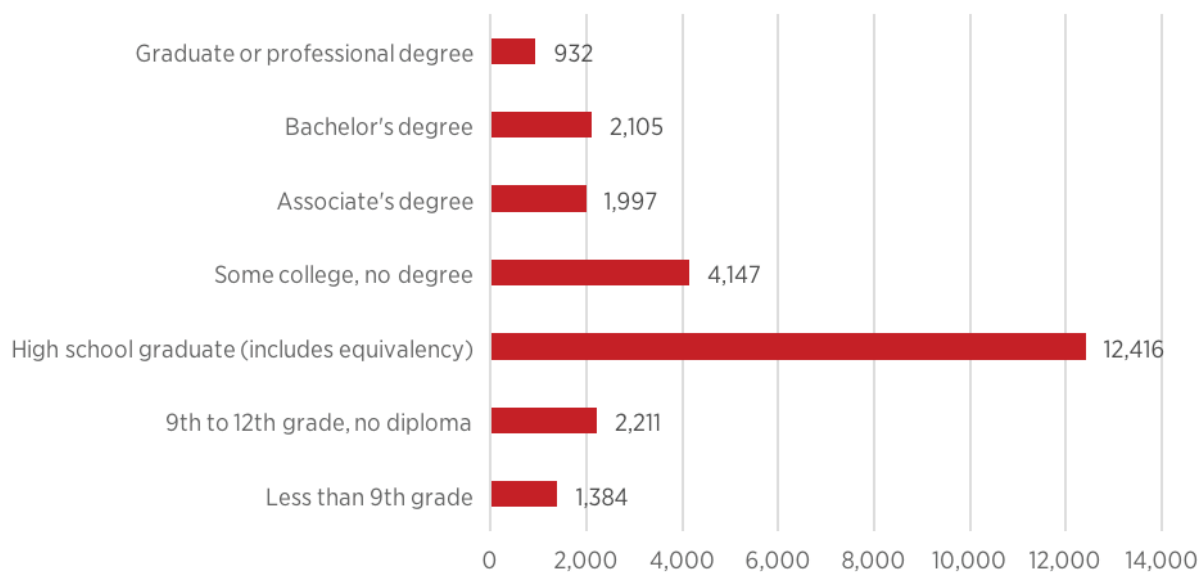
Source: U.S. Census Data



The educational attainment of a region is highly important as it relates to the availability of a skilled workforce. Those regions with a large number of college educated workers are primed to retain and attract high-wage, advanced service white collar jobs in financial services, information technology, health care and professional service firms that drive many successful economies.

Coshocton County has a great number of its population with a high school degree, 12,416 people which represents 85.7% of the total people living in Coshocton County. That is just slightly below the state average of 89.5%. Due the heavy reliance on manufacturing and transportation and warehousing in Coshocton County and the need for those workers to have a high school degree, this bodes well for Coshocton to keep and attract companies to the area. At 12.1% Coshocton County is well below the state average of 26.7% of those people that have a bachelor's degree. Coshocton's ability to attract higher wage jobs that require a bachelor's degree or higher, and its ability to fill the jobs of management at manufacturing, transportation and warehousing companies is hampered by this low baccalaureate rate.

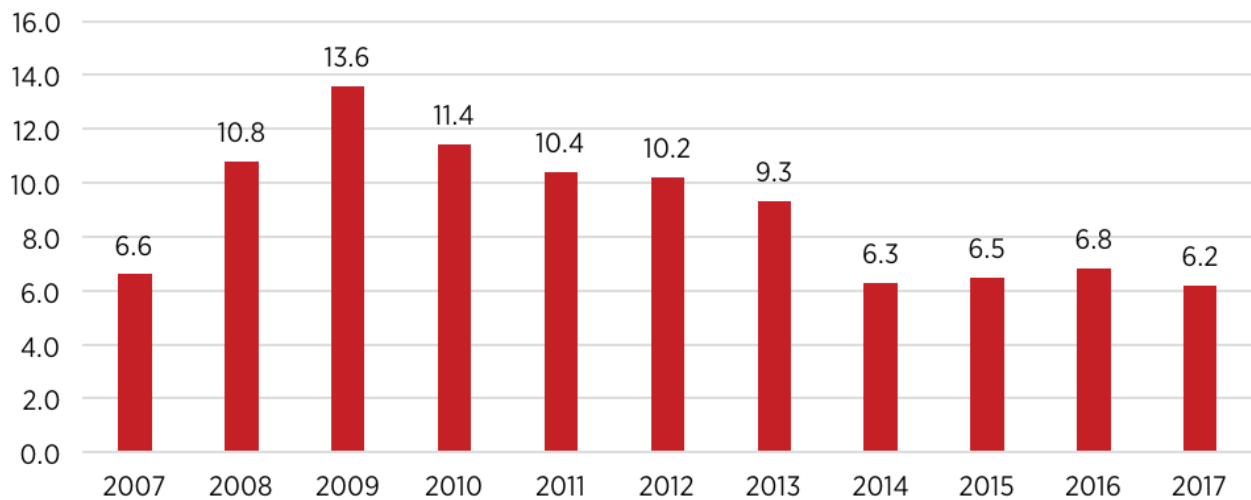
COSHOCOTON COUNTY EDUCATION ATTAINMENT



Source: U.S. Census Bureau

A region's unemployment rate is an important measure of its economic success. It appears from an unemployment rate that Coshocton County has recovered from the recession of 2009. The unemployment rate in December 2009 was 13.9% and stands at 6.2% as of December 2017. The state of Ohio unemployment rate as of December 2017 is 4.7%. While Coshocton's unemployment rate is higher than Ohio's, the County is tracking well with the rest of the state in terms of trends in this area. Coshocton has a higher rate than its neighbors in Tuscarawas at 4.8%, Holmes at 3.1%, and Muskingum at 5.5%. Coshocton does fare better than other surrounding counties with Guernsey at 6.5%, Noble at 8.1% and Morgan at 7.3%.

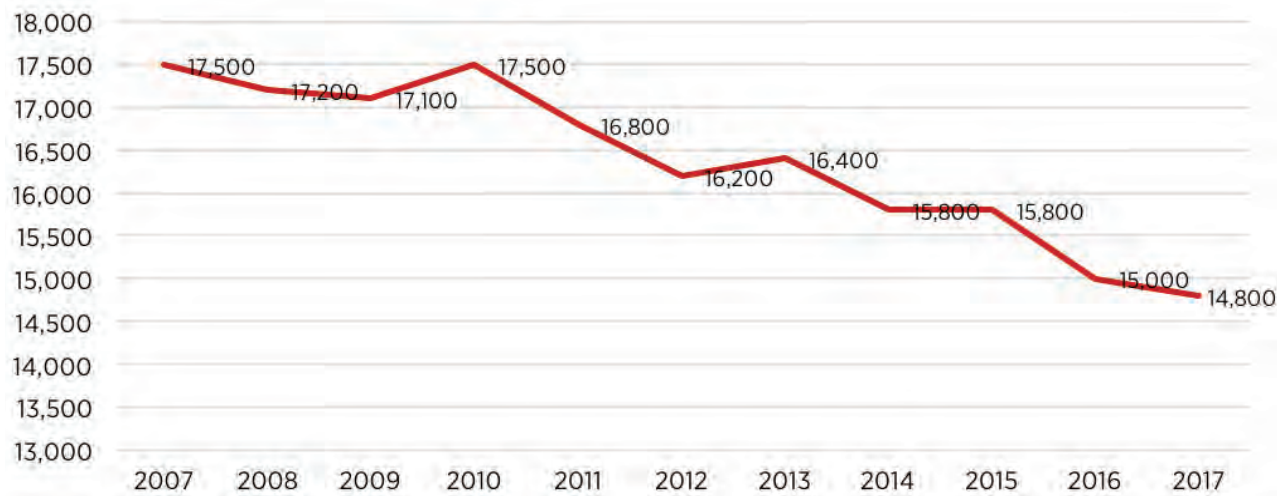
COSHOCTON COUNTY UNEMPLOYMENT RATE



Source: Ohio Labor Market Information

The Civilian Labor Force provides a good measure of how many people are available to work in the County. It comprises civilians 16 years of age and over who are working or seeking work. It excludes military personnel, persons in institutions, those studying or keeping house full-time, persons who are retired or unable to work, and volunteer workers. The average of Coshocton County's Civilian Labor Force for 2017 was 14,800. Over the last decade the labor force has shrunk from 17,500 in 2007 to 14,800 in 2017, a drop of 2,700 and 15% over that timeframe. This is likely due to workers moving out of the County to other areas to pursue job opportunities as jobs have shifted from Coshocton County. This is commensurate with the loss of 2,108 jobs in the County from 2007 to 2017.

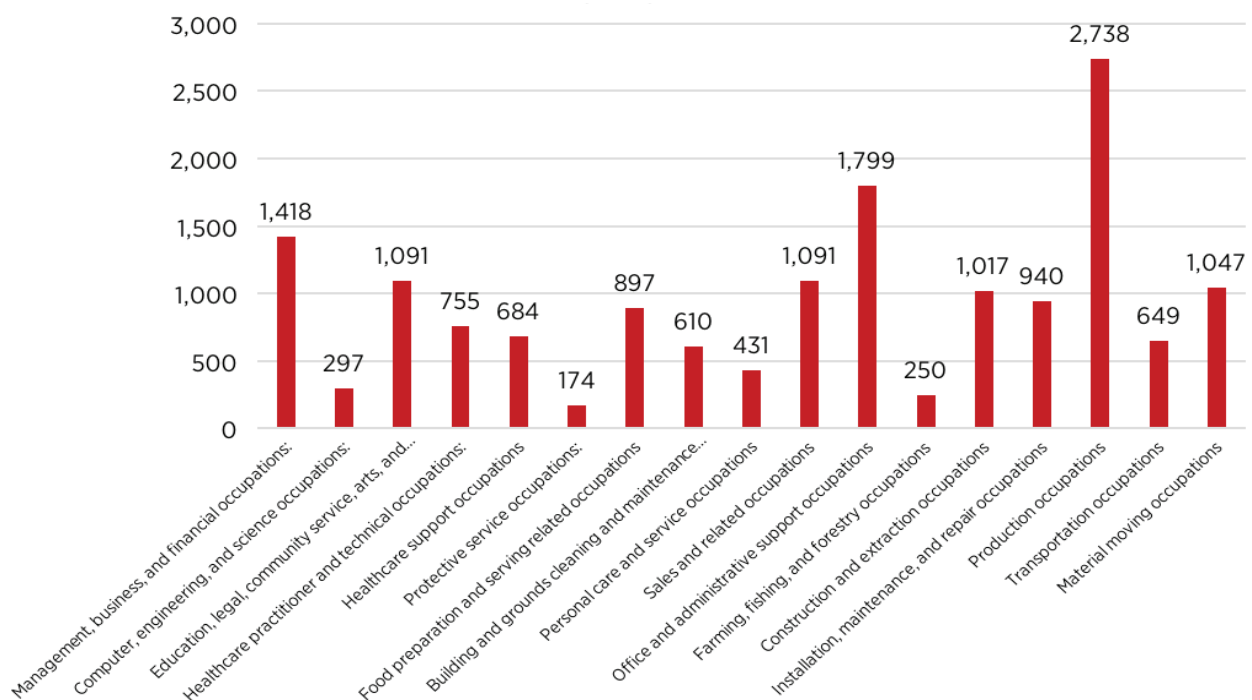
COSHOCTON CIVILIAN LABOR FORCE



Source: Ohio Labor Market Information

Understanding the industries that a community has a strong workforce in illustrates its likely success in a targeted industry, as discussed in the cluster analysis review above. As the chart below shows, as of 2016 the largest occupations for people that live in Coshocton County is in Production Occupations with 2,738 people. That is followed by people employed in office and administrative support with 1,799 people, and management, business and financial services with 1,418. These are people that live in the County but might not necessarily work in the County. They may travel outside of the County to work on a daily basis.

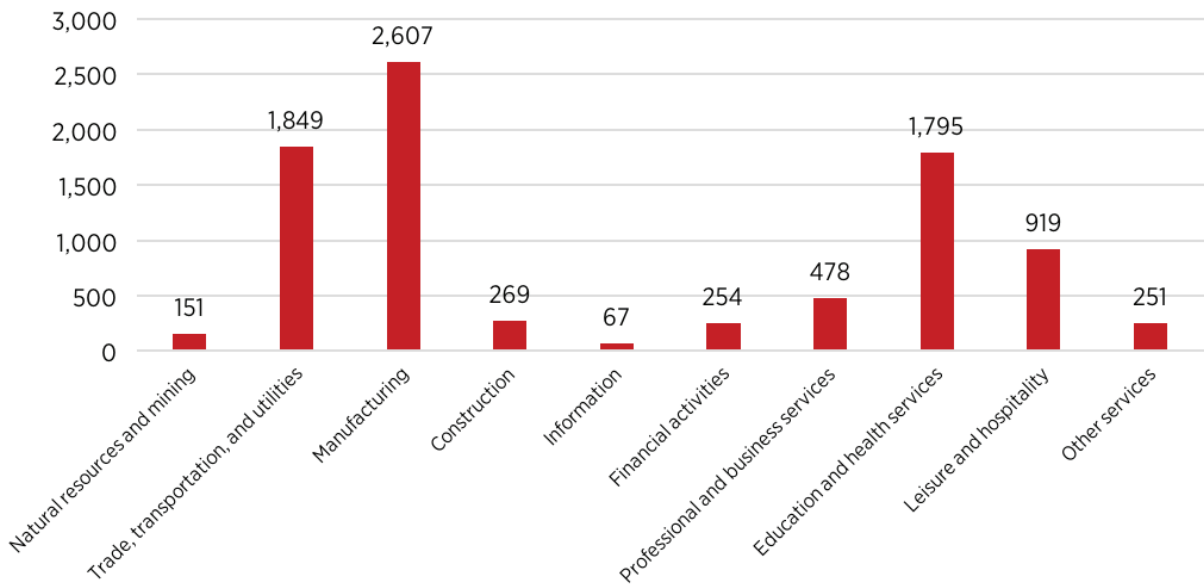
COSHOCTON COUNTY EMPLOYMENT IN OCCUPATION



Source: US Census Bureau

From a perspective of people that work in Coshocton County, its largest job sector as of June 2017 is manufacturing with 2,607 employees followed by trade, transportation and utilities with 1,849 employees and then education and health services with 1,795 employees.

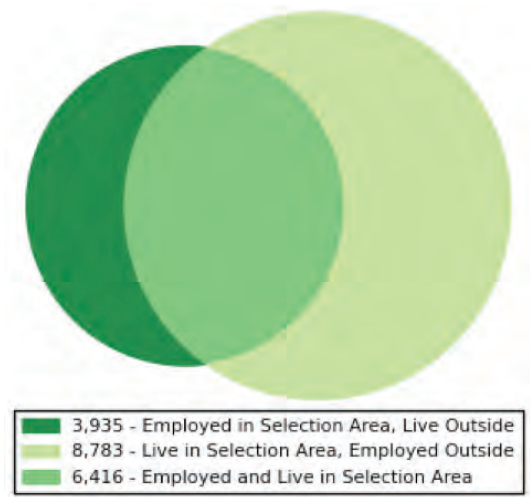
COSHOCTON COUNTY JOBS PEOPLE WORKING IN COSHOCTON COUNTY JUNE 2017



Source: U.S. Bureau of Labor Statistics

Currently Coshocton County is a net exporter of jobs as 4,848 people leave Coshocton to pursue employment on a daily basis.

INFLOW/OUTFLOW JOB COUNTS IN 2015



From an employment perspective, it is clear that Coshocton County has not fully recovered from the 2009 national economic recession. In 2012 there were 8,782 people working in Coshocton County.

As of June of 2017, there are 8,640 people working in the County. Coshocton County hit a high of employment in 2007 with 10,443 people working in the County. In 2013 that number was 9,261. The upside for Coshocton County is that it has seen an upswing of 138 jobs in the manufacturing sector in the last 5 years. Like many communities in Ohio it has also seen the growth of 105 jobs in the education and healthcare sector in that time. The shale boom in counties surrounding Coshocton has not yet seem to affect the County in any significant way.

The future of Coshocton County will rely on its ability to make sites available for manufacturing and trade, transportation and utilities. It will also likely rely on its ability to make use of the natural resources that are running through the County through pipelines. Coshocton County has a strong history of manufacturing and has the workforce in the County to support growth in that sector and keep more of the people in the County, and attract new residents to the County, that are employed in the manufacturing sector.



EXISTING INFRASTRUCTURE ASSESSMENT

Infrastructure is the foundation which supports a thriving economy. Access to infrastructure is the key factor in evaluating sites with the potential to support the development of a new Coshocton County Industrial Park. EMH&T gathered information from the resources listed below to gain understanding of existing transportation and utility infrastructure in Coshocton County in order to assess development potential of properties with the ability to capitalize on existing infrastructure.

- Coshocton County GIS
 - ◇ Water and sewer infrastructure for City of Coshocton and the Village of West Lafayette
 - ◇ Floodplain data (Floodway, 100-year floodplain and 500-year floodplain)
 - ◇ Parcel data highlighting parcels at least 50 acres
 - ◇ Existing directional oil and gas wells
 - ◇ Mapped oil and gas fields
- Columbus Gas/NiSource GIS – natural gas distribution and transmission lines
- 2006 Coshocton County Strategic Plan
- 2006 Coshocton County Comprehensive Land Use Plan
- Study for connecting Village of West Lafayette water system to the City of Coshocton System (still in process of obtaining)
- Specifications for BOD reactor installed at City of Coshocton Waste Water Treatment Plant which was installed for the ethanol plant, but was mothballed because demand did not materialize
- System wide testing for flows and pressures (still in process of obtaining)
- Meetings with County, City of Coshocton, Village of West Lafayette and Coshocton County Port Authority staff

The majority of the existing data has been compiled into a georeferenced Google Earth KMZ file which allows the information to be easily viewed and shared in a universally accepted format.



WATERWAYS

The Tuscarawas, Walhonding and Muskingum Rivers are not navigable for commercial use but is a community asset for recreational uses.

RAIL

Coshocton County is served by 65 miles of short line railroads operated by the Ohio Central Railroad and the Columbus Ohio River Railroad. These short lines are part of the Genesee & Wyoming Rail Road and have connections to various CSX, Wheeling and Lake Erie railway and NS facilities in Columbus, Goulds and Harmon. The short lines provide rail service to:

- Undeveloped greenfield and brownfields as well as existing industrial facilities on the south side of Coshocton
- Existing commercial development through the middle of Coshocton
- The RBL Enterprises LLC property (former paper mill)
- Greenfield sites at the US 36/SR 93 intersection

The need for rail access is associated with some industrial users, but it is not a prerequisite for identifying potential sites for new industrial development. As such, it does not appear significant improvements to existing mainline railroad infrastructure within Coshocton County are needed at this time. Local improvements to add siding track or spurs for servicing a site would be implemented once the needs for a specific project are defined.

AIRPORT

In 2010/2011 the runway at Coshocton County's Richard Downing Airport was expanded to its current length of 5,000ft. It classified as a Reliever, General Aviation facility under current National Plan of Integrated Airport Systems (NPIAS) guidelines. There are some opportunities for smaller scale development and redevelopment at the airport which will most likely be driven by the needs of a specific user. The land surrounding the airport is not suited for largescale commercial development because it is situated at the top of a hill with significant grade changes on all sides.

Current access to the airport is via Airport Road, which is a two-lane dead-end road. The 2006 Coshocton County Comprehensive Land Use plan identifies extending Airport Road to create another means of access from County Road 193 as a recommended infrastructure improvement. Although this road extension would enhance the access and safety of the airport, it would not be a road which could support large-scale commercial development as the land through which the road would be extended has significant topography (approximately 200' of elevation change) and does not have ready access to water and sewer infrastructure. (See Appendix E for Airport Existing Conditions Exhibit)

ROADWAY INFRASTRUCTURE

There are currently approximately 1,200 miles of roads and 3,007 bridges in Coshocton County. US 36, SR 16 and SR 83 provide the backbone of the County's roadway infrastructure. SR 83 is a two-lane highway and is the main north/south arterial. US 36 is a major east/west thoroughfare. The section of US 36 between Coshocton and the Tuscarawas County line is a four-lane divided highway. SR 16 originates in Coshocton and extends south out of the City as a four-lane divided highway until County Road 6. From there, it extends to the Muskingum County line as a two-lane highway.

SR 60, SR 93 and SR 751 are secondary highways which provide north/south connectivity in the County. SR 541 is a secondary highway which runs east/west through the County. The County's closest access to the interstate highway system is to I-77 via US 36, approximately 20 miles east of Coshocton at Newcomerstown.

In 2018, ODOT will begin a project to replace the existing SR 541 bridge over SR 16/SR 83 and convert the SR 541/SR 16 interchange to a tight diamond configuration. This improvement will enhance the movement of traffic through the interchange and raise the clearance of the SR 541 bridge over SR 16/SR 83.

This primary road infrastructure has capacity to serve additional development of the magnitude being contemplated with this study. Specific work needed to support site development are local improvements such as:

- Reconstruction of existing unimproved county roads which will carry traffic from the site to the nearest improved roadway
- Intersection improvements where new internal roads and/or site drives intersect with existing roadways. Such improvements could include turn lanes and traffic signals
- New roads internal to the overall site which provide access to development parcels

Recently, the northeast portion of Coshocton County has experienced growth in forestry product manufacturing. These businesses tend to be located outside existing primary transportation corridors in areas served by unimproved County and Township Roads. Improving these roads (similar to the County Road project in 2014) will support additional growth in the forestry product industry. Further study is needed to prioritize which roads should be improved.



WATER

There are three municipal water treatment and distribution systems located in Coshocton County.

COSHOCTON COUNTY WATER SYSTEMS

Community	Capacity (GPD)	Current Use
City of Coshocton	15,000,000	3,000,000 (current)
Village of West Lafayette	1,000,000	190,000 (2006)
Village of Warsaw	180,000	84,000 (2006)

The former RBL Enterprises LLC property in the City of Coshocton drove the need for the 15,000,000 gpd capacity of the City's water treatment plant. The existing 24" main which supplies water to the paper mill site has the capacity to deliver 9,000,000 gpd serving existing and new development. A 12" main along the railroad tracks supplies water to the existing industrial and brownfield sites on the south end of town along Second Street with capacity to deliver a total of 4,900,000 gpd to existing and new development. Existing water mains located at the limits of the City of Coshocton Village of West Lafayette water systems are summarized in the table below.

INFRASTRUCTURE AT LIMITS OF EXISTING WATER SYSTEM

System	Location	Size of Line
City of Coshocton	South – Railroad Tracks and Paper Mill Road	10"
City of Coshocton	East – CR 16, to a point approximately 0.5 miles west of CR 164	12"
City of Coshocton	North – CR 10, to CR 192 (2018 Construction Project)	10"
City of Coshocton	West – CR 495, to a point approximately 1,500ft north of US 36	10"
Village of West Lafayette	South – Intersection of Johnson St & CR 155	10"
Village of West Lafayette	East - SR 751, approximately 500' east of the First Regular Baptist Church	8"
Village of West Lafayette	North – SR 93, just north of US 36	8"
Village of West Lafayette	West – CR 16, approximately 850ft west of Johnson Street	6"

TBD – additional information to be provided by the City of Coshocton and Village of West Lafayette utility departments or obtained via field flow testing.

The key to leveraging excess capacity in the City of Coshocton and Village of West Lafayette water systems as an asset to attract development is the ability provide the excess capacity to identified development sites and redevelopment sites. A study has been prepared addressing the estimated cost and feasibility of constructing a new main along the County Road 16 corridor to connect the Village of West Lafayette to the City of Coshocton water system. Such a connection would support the goal leveraging the City of Coshocton's excess capacity because it would allow it to be distributed over a wider service area, including the SR 93 corridor.



The CR16 corridor is located along the south side of the Tuscarawas River through a rural area comprised of primarily agricultural land and large lot single-family homes. Extending a water main through this area will allow existing homes along the corridor to connect to the system. However, the CR16 corridor is not well suited for commercial development as there is no direct access to US 36 without having to go through downtown Coshocton or downtown West Lafayette. To maximize the return on investment in the infrastructure needed to connect the two systems, an alternate alignment along the US 36 corridor should be explored.

A connection along the US 36 corridor would begin at an existing 12” water main located at the intersection of Church St and Brenaird St in Canal Lewisville and extend to an existing 8” line located at the US36/SR93 intersection. The sizing of the line should be evaluated based on supporting commercial development along the US36 corridor. Constructing the connection along the US36 corridor will also provide more direct water supply to the water projects listed in the December 12, 2017 Coshocton Regional Water Expansion Project presentation along US36 (US36, Dickerson’s Trailer Court, Cow Corners, Bouquet Village, Richard Downing Airport, Canal Lewisville and Walnut Hills Estates).

SANITARY SEWER

The three communities with municipal water treatment and distribution systems located in Coshocton County also provide wastewater treatment.

COSHOCTON COUNTY MUNICIPAL WASTEWATER TREATMENT SYSTEMS

Community	Capacity (gpd)	Current Use (gpd)
City of Coshocton	4,400,000	1,300,000 (current)
Village of West Lafayette	320,000	220,000 (2018)
Village of Warsaw	170,000	80,000 (2006)

The available sanitary sewer capacity could be a limiting factor in supporting new development as the water distribution systems can supply much more water than can be accommodated at the wastewater treatment plants. The primary reason for the difference in water treatment capacity vs. wastewater

treatment capacity is the paper mill had an Ohio EPA National Pollution Discharge Elimination System (NPDES) permit to operate an on-site treatment plant and did not send its wastewater to the City's wastewater treatment plant.

The backbone of the City of Coshocton waste water collection system is a trunk sewer which runs along Water Street, through commercial properties along South Second Street and then along the river to the wastewater treatment plant. This trunk line varies from 15" in diameter at the upstream end of the service area to a 36" diameter line at the wastewater treatment plant. Various combinations of secondary gravity mains, force main and lift stations are utilized to provide sewer throughout the service area.

The City of Coshocton wastewater treatment plant includes a Biothane Corporation high strength anaerobic digestion system. As currently configured, this system has the capacity to treat a flow of 100gpm (144,000gpd) with a COD concentration of up to 4,445 mg/l, a BOD concentration of up to 2,778 mg/l and a TSS concentration of up to 233 mg/l. The maximum capacity is 540,000gpd with removal of 12,500 lb/d of BOD/COD and 1,050 lb/d TSS.

The equipment was installed in anticipation of receiving flow with high BOD content from the ethanol treatment plant. The system has been mothballed because the ethanol plant is not producing the anticipated loading. This system could be attractive to businesses which generate flows with high concentrations of BOD because it would preclude them from having to operate and maintain an on-site pretreatment system to reduce the BOD concentration to allowable limits established for standard strength flows.

The wastewater collection system in the Village of West Lafayette consists of 8" 10" and 12" diameter gravity mains and force mains and lift stations. Existing water collection systems located at the current limits of the City of Coshocton Village of West Lafayette services areas are summarized in the table below.



INFRASTRUCTURE AT LIMITS OF EXISTING WASTE WATER COLLECTION SYSTEMS

System	Location	Size of Line
City of Coshocton	South – Along the railroad to the ethanol plant	Size TBD” – Force Main
City of Coshocton	East – CR 16, to a point approximately 1,200ft east of 20th St	8” Gravity
City of Coshocton	North – CR 10, to a point approximately 500ft north of CR 170	Size TBD”- appears to be a force main
City of Coshocton	West – SR 541, to a point approximately 500 west of CR 1178	12”- gravity
Village of West Lafayette	South – End of Center Street	8” Gravity
Village of West Lafayette	East – SR 751 to CR 488	2” Force Main
Village of West Lafayette	North – SR 93 to a point just south of CR 239	Size TBD” – Force Main
Village of West Lafayette	West – Morning Glory Road	Three 8” gravity lines served by a lift station

TBD – additional information to be provided by the City of Coshocton and Village of West Lafayette utility departments or obtained via field flow testing.

TELECOMMUNICATIONS – AT&T, SPECTRUM

AT&T has available underground copper and fiber optic service throughout the county. Fiber coverage is limited to areas of existing commercial development. AT&T has indicated they are willing to extend to serve new development with limited cost being passed on to the project.

At the time of the preparation of this strategic plan, Spectrum had not provided any response to inquiries regarding their existing telecommunications infrastructure in Coshocton County.

ELECTRIC – AEP, FRONTIER COOP

Frontier Energy and AEP both maintain overhead distribution lines throughout Coshocton County. CR10 serves as a boundary between AEP (west of CR10) and Frontier Coop (east of CR10) service areas.

GAS – COLUMBUS GAS

Columbia Gas has several transmission lines which traverse Coshocton County as well as a network of distribution lines which provide service to residential and commercial customers throughout the County.

IDENTIFIED SITES

Through the infrastructure analysis and consultation with Coshocton County Port Authority staff, two sites stand out as market-ready, the Sabic site and the Paper Mill Rd Site. Three additional sites were identified as well for industrial development but given their infrastructure needs and the cost involved, they are not market ready and are on a longer timeframe for development:

1. SABIC SITE (FORMER GE FACILITY) (SEE APPENDIX A FOR EXISTING CONDITIONS EXHIBIT)

This site is part of the available property listing on the Coshocton County Port Authority's web site. As a part of this plan, the existing infrastructure was evaluated to confirm suitability for redevelopment.

Location: This site contains approximately 58 developable acres located along the east side of South 2nd Street between Browns Lane and the General Foods Corporation facility.

Topographic Considerations: The site is general flat with 8-10 feet of fall from east to west and is well suited for redevelopment. About 15 acres of the site along South 2nd Street and adjacent to the General Foods Corporation facility is below the FEMA 100-year base flood elevation. As a part of any site redevelopment, that portion of the site will need to be filled such that it is at least one foot 100-year base flood elevation.

Environmental Considerations: The site listing on the Coshocton County Port Authority website indicates environmental remediation has been performed on the property to meet standards applicable to commercial development. A No Further Action letter and associated covenant not to sue were issued in 2015.

US Fish & Wildlife Considerations: Ohio falls within the range of the Indiana Bat which is an endangered species. The rules and regulations applicable to the Indiana Bat are focused on habitat disturbance during the roosting season. As such, within the range of the Indiana Bat, tree clearing is prohibited between April 1st and October 31st. The restriction for tree clearing can be a determining factor in establishing construction schedules for public and private infrastructure.

This site has a few scattered mature trees and as such would not be considered quality habitat. However, to be in full compliance with the Endangered Species act, it may be prudent to clear the existing trees during the next winter clearing season.

Water Infrastructure: The site is currently served by an existing 12" City of Coshocton water main located along the northern edge of the site and an existing 16" City of Coshocton water main located along the sites eastern edge, adjacent to the railroad tracks. The existing lines can deliver 4,900,000gpd

to the site rather than the 9,000,000gpd indicated on the Port Authorities “available property” on-line listing.

Sanitary Sewer Infrastructure: The site is currently served by a 36” diameter City of Coshocton gravity sanitary sewer located along the west side of South 2nd Street. A 12” City of Coshocton gravity sewer is stubbed under South 2nd Street into the northwest corner of the site.

Transportation: The site has frontage on South 2nd Street and a shared access with the General Foods Corporation facility located at the southeast corner of the property.

Gas: The site is served by an existing 4” Columbia Gas distribution line located along the east side of South 2nd Street, approximately 800 ft from the southeast corner of the property.

Telecommunications: Fiber service is provided to the site by Time Warner Internet.

Electric: This site is served by existing AEP transmission lines located along the site’s southern edge, adjacent to the general Foods Corporation Facility.

2. PAPER MILL ROAD SITE (SEE APPENDIX A FOR EXISTING CONDITIONS EXHIBIT)

Location: This site contains approximately 23 developable acres located along the east side of the railroad tracks between SR83 and Paper Mill Road and is currently owned by the Coshocton County Port Authority.

Topographic Considerations: The site is very flat with 3-5 feet of elevation change from east to west. The majority of the site is below the FEMA 500-year base flood elevation, but above the 100-year base flood elevation. As such the site can be developed without and floodplain permitting, but insurance requirements for some potential users may require the site to be filled such that it is at least one foot above the 500-year base flood elevation.

Environmental Considerations: The existing drainage ditch running through the site would likely be considered a jurisdictional feature and as such, any impacts associated with development would need the applicable Ohio EPA and US Army Corps of Engineer’s permits.

US Fish & Wildlife Considerations: Ohio falls within the range of the Indiana Bat which is an endangered species. The rules and regulations applicable to the Indiana Bat are focused on habitat disturbance during the roosting season. As such, within the range of the Indiana Bat, tree clearing is prohibited between April 1st and October 31st. The restriction for tree clearing can be a determining factor in establishing construction schedules for public and private infrastructure. The wooded area at the northwest corner of the property would be considered viable habitat.

Water Infrastructure: The site is currently served by an existing 10" City of Coshocton water main located along the north side of Paper Mill Road.

Sanitary Sewer Infrastructure: The site is served by the existing force main which was installed to service the Ethanol Plant. A new sanitary sewer pump station would need to be installed in order to utilize the existing force main.

Transportation: The site is bounded on the south by Paper Mill Road, on the north by SR83 and on the west by the rail road.

Gas: An existing 2" Columbia Gas distribution line located along Buckeye Street approximately 600ft west of CR91 would need to be extended approximately 2,500ft along Buckeye Street, CR91 and SR83 to service the site.

Telecommunications: AT&T is the telecommunications provider do the site.

Electric: This site is served by an overhead three-phase AEP distribution line on the western edge of the property, adjacent to the rail road.

3. GREENFIELD SITE #1 (SEE APPENDIX A FOR EXISTING CONDITIONS EXHIBIT)

Location: Greenfield Site #1 contains approximately 183 developable acres located along the north side for US 36, along the east side of County Road 10 under the control of two property owners.

Topographic Considerations: The southern and western portions of the site are relatively flat while the northern and eastern portion of the site has steep slopes and a nearly 200ft change in elevation. Significant commercial developments typically require large level areas for buildings and parking/service areas. The existing topography of the northern and eastern portions of the site is not suited for the creation of large level building pads as that would require an extraordinary amount of grading. In addition, the elevation changes enough that a water booster station would likely be needed to ensure water could be provided to that portion of the site with flows and pressures sufficient to support site development. The flat portions of the site could be developed without incurring extraordinary costs for earthwork or the need for a water booster station.

Environmental Considerations: A review of National Wetlands Inventory (NWI) mapping indicates the site contains two jurisdictional streams and one small (0.14 acre) wetland. The larger of the two streams generally runs parallel to CR10 and is part of a FEMA designated Special Flood Hazard Area (SFHA), but is not subject to regulatory floodway. The southern end of the smaller stream appears to be an agricultural drainage ditch, which picks up drainage from a stream, which runs down a hillside

from the northern/eastern portion of the site into the flat area of the site. A small portion of this stream, just north of US36 is part of a FEMA designated SFHA as 100-year floodplain, but is not subject to regulatory floodway. To support development on the site, some of the floodplain area along this stream will need to be filled. The mapped wetland is located in the northern/eastern portion of the site and as such, would not be disturbed by development. The large stream parallel to CR10 is a significant enough feature that impacting it for development (other than roadway crossings) would not be recommended. The smaller stream will likely be impacted by development activity ranging from road/access drive crossings to relocation of the stream, or fully enclosing the stream to maximize developable area. Any impacts will require permits to be obtained from the Ohio EPA and the US Army Corps of Engineers.

US Fish & Wildlife Considerations: Ohio falls within the range of the Indiana Bat which is an endangered species. The rules and regulations applicable to the Indiana Bat are focused on habitat disturbance during the roosting season. As such, within the range of the Indiana Bat, tree clearing is prohibited between April 1st and October 31st. The restriction for tree clearing can be a determining factor in establishing construction schedules for public and private infrastructure.

Water Infrastructure: The site is currently served by an existing 10" City of Coshocton water main along CR 10. The 10" line is fed from an existing 12" located at the intersection of Church Street and Brenaird Street, just south of US36.

Sanitary Sewer Infrastructure: The site is served by an existing City of Coshocton gravity sewer located along the west side of Brenarid Street, just south of US36.

Transportation: The site is bounded on the west by County Road 10, on the north by County Road 170 and on the South by US36. If County Road 10 is utilized for site access, the portion up to the entrance to the site would likely require full reconstruction. Subject to ODOT District 5 approval, the site could also be served by constructing a new access point along US36. This site does not have access to rail service.

Gas: The site is served by an existing 2" Columbia Gas distribution line located at the intersection of Church Street and Brenaird Street. The 2" line is supplied by an existing 4" line located at the US36/SR 83 intersection, approximately two miles southwest of the site.

Telecommunications: AT&T has buried copper facilities along County Road 10 which provide service to the site. AT&T also has fiber optic lines in the area which serve the ODOT maintenance facility along the south side of Rivercrest Drive (CR621) about 0.6 miles from the site. These lines could be extended to provide fiber service to the site.

Electric: The boundary between AEP and Frontier Power Company service areas follows the stream running from north to south through the western portion of the site. AEP's existing overhead three phase lines are located along CR10. Frontier Power Company's existing overhead three phase lines are located along CR170. This is a 12kV line with 0.2 MW of excess capacity. Development west of the stream would be served by AEP while development east of the stream would be served by Frontier Power Company. Frontier Power Company also has 34kV overhead transmission lines located approximately 2 miles west of the site.

4. GREENFIELD SITE #2 (SEE APPENDIX B FOR EXISTING CONDITIONS EXHIBIT)

Location: Greenfield Site #2 contains approximately 91 developable acres located along the north side for US36, east side of SR93 under the control of a single property owner.

Topographic Considerations: The western portion of the site is relatively flat while the eastern portion of the site has steep slopes and a nearly 250ft change in elevation. Significant commercial developments typically require large level areas for buildings and parking/service areas. The existing topography of the eastern portion of the site is not suited for the creation of large level building pads as that would require an extraordinary amount of grading. In addition, the elevation changes enough that a water booster station would likely be needed to ensure water could be provided to that portion of the site with flows and pressures sufficient to support site development. The flat portions of the site could be developed without incurring extraordinary costs for earthwork or the need for a water booster station.

Environmental Considerations: National Wetlands Inventory (NWI) mapping indicates a jurisdiction stream which runs along the site's western edge, but does not show any other mapped features within the footprint of the site. The stream is part of a FEMA designated Special Flood Hazard Area (SFHA), but is not subject to regulatory floodway. To support development on the site, some of the floodplain area along this stream will need to be filled. The stream is a significant enough feature that impacting it for development (other than roadway crossings) would not be recommended.

US Fish & Wildlife Considerations: Ohio falls within the range of the Indiana Bat which is an endangered species. The rules and regulations applicable to the Indiana Bat are focused on habitat disturbance during the roosting season. As such, within the range of the Indiana Bat, tree clearing is prohibited between April 1st and October 31st. The restriction for tree clearing can be a determining factor in establishing construction schedules for public and private infrastructure.

Water Infrastructure: The site is currently served by an existing 8" Village of West Lafayette water main located at the US36/SR93 intersection.

Sanitary Sewer Infrastructure: The site is currently served by an existing 8" Village of West Lafayette gravity sewer located at the US36/SR93 intersection.

Transportation: The site is bounded on the south by US 36 and on the west by an existing Ohio Central Railroad short line track. The site also has access to CR167 to the east via an extended drive located in the US36 right-of-way. This drive would need to be fully reconstructed as a public street in order to be utilized for primary site access. Subject to ODOT District 5 approval, the site could also be served by constructing a new access point along US36.

Gas: The gas infrastructure nearest to the site is an existing 2" Columbia Gas distribution line located along the west side of SR93 approximately 0.8 of a mile south of US36. This line could be extended (including the river crossing) to serve the site.

Telecommunications: AT&T has buried copper facilities along SR93 and US36 which provide service to the site. AT&T also has fiber optic lines located along SR93 at the northern Village of West Lafayette corporation limit about 0.8 miles from the site. These lines could be extended north (including the river crossing) to provide fiber service to the site.

Electric: This site is served by Frontier Power Company. There is an existing 5 MW sub-station located at the southeast corner of the property with 3MW of available capacity.

5. SHELLY MATERIALS SITE (SEE APPENDIX A FOR EXISTING CONDITIONS EXHIBIT)

Location: This site contains approximately 64 developable acres located along the east side of County Road 495, just north of the CR495/US36 intersection and is under the control of a single property owner

Topographic Considerations: The site was formerly a quarry operation for Shelly Materials. Materials were excavated on the eastern 60 acres of the property and stockpiled and processed on the eastern 60 acres of the site. The portion of the site where materials were mined is well below the FEMA 100-year base flood elevation and is not suited for development while the western portion of the site is generally flat and could be reasonably graded to support significant commercial development.



Environmental Considerations: National Wetlands Inventory (NWI) does not show any mapped jurisdictional features within the site's footprint, although the Kokosing River forms the northern boundary of the property. The Kokosing River is part of a FEMA designated Special Flood Hazard Area (SFHA), but is not subject to regulatory floodway. The portion of the site which is part of the floodplain is the eastern area where materials were mined.

US Fish & Wildlife Considerations: Ohio falls within the range of the Indiana Bat which is an endangered species. The rules and regulations applicable to the Indiana Bat are focused on habitat disturbance during the roosting season. As such, within the range of the Indiana Bat, tree clearing is prohibited between April 1st and October 31st. The restriction for tree clearing can be a determining factor in establishing construction schedules for public and private infrastructure.

Water Infrastructure: The site is currently served by an existing 10" City of Coshocton water main located along the west side of CR495.

Sanitary Sewer Infrastructure: The sanitary sewer which would most likely serve the site is an existing 18" City of Coshocton gravity sewer located at the CR495 SR16/SR83 intersection approximately one mile to southeast.

Transportation: The site is bounded on the south by CR495 which intersects with US 36 approximately 0.2 mile south of the site.

Gas: The site is served by an existing 4" Columbia Gas distribution line located along the east side of CR495.

Telecommunications: The site is served by existing underground AT&T copper lines and overhead AT&T fiber lines along the west side of CR495.

Electric: This site is served by an existing overhead AEP single phase circuit along the west side of CR495.



INDUSTRIAL PARK BENCHMARKING

In order to understand how these identified sites should be marketed and a competitive price to take them to market, an analysis of industrial parks in the region that will be in direct competition with these industrial sites is needed. Coshocton County largely competes with its neighboring counties for projects and will continue to so into the future. An analysis was conducted of four industrial parks in the region that are being marketed to energy intensive industries including food processing and wood manufacturing. Each site is similar in size to the Sabic site and the Paper Mill Rd site. The sites have utilities on site or close by. The sites are being offered for sale from \$25,000 per acre to \$45,000 per acre. A description of each site and its characteristics follows. (See Exhibit L for more detailed information on each industrial park)

1. NorthPointe Industrial Park, 4933 NorthPointe Dr., Zanesville, Muskingum County

Minimum Acreage and Maximum Acreage	10 acres to 34.6 acres
Sale Price	\$45,000 per acre
Incentives	Enterprise Zone, 75% to 100% for 10 years
Highway Access	SR 16: 0 miles; I-70: 6 miles
Electric	AEP on-site
Gas	Columbia Gas on-site
Water	City of Zanesville on-site
Sewer	City of Zanesville on-site
Telecom	AT&T and Time Warner on-site

2. EastPointe Business Park, Eastpoint Dr., Zanesville, Muskingum County

Minimum Acreage and Maximum Acreage	5-30 acres available
Sale Price	\$25,000 per acre
Incentives	Enterprise Zone, 75% to 100% for 10 years, and Foreign Trade Zone
Highway Access	SR 93: 0.5 miles; I-70: 3 miles
Electric	AEP on-site
Gas	Energy Co-Op on-site
Water	Muskingum County 18-in. line on-site
Sewer	Muskingum County 8-in. line on-site
Telecom	AT&T and Time Warner on-site

3. Reeves Mill Business Park, 3339 Oxford St, Dover, Tuscarawas County

Minimum Acreage and Maximum Acreage	1-25 acres available
Sale Price	\$30,000 per acre
Incentives	Enterprise Zone, 75% to 100% for 10 years
Highway Access	SR 800: 2 miles; SR 39: 2 miles; I-77: 2 miles
Electric	City of Dover on-site
Gas	Dominion East-Ohio Gas on-site
Water	City of Dover on-site
Sewer	City of Dover on-site
Telecom	City of Dover

4. Newcomerstown Industrial Park, CR 15-East State Rd, Newcomerstown, Tuscarawas County

Minimum Acreage and Maximum Acreage	13-174 acres available
Sale Price	\$25,000 per acre
Incentives	Enterprise Zone; 50%-75% for 10 years
Highway Access	US 36: .5 miles; I-77: 1 mile
Electric	AEP, .1 miles to substation
Gas	Columbia Gas on-site; 3 in. line, 49psi
Water	Village of Newcomerstown 12-in line on-site; 955,000GPD capacity
Sewer	Village of Newcomerstown 18-in. line on-site; 582,000 GPD capacity
Telecom	AT&T adjacent to site

INDUSTRIAL PARK ECONOMIC IMPACT ANALYSIS

COSHOCTON COUNTY PROPOSED FOOD PROCESSING MANUFACTURING FACILITIES ECONOMIC IMPACT ANALYSIS



INTRODUCTION

The Center for Regional Development (CRD) at Bowling Green State University (BGSU) was retained by the Montrose Group, LLC to conduct an estimate of the economic impact of the development and proposed construction of a new food processing manufacturing facilities on five new industrial park developments within Coshocton County. CRD utilized its inflow/outflow tool to delineate a six-county labor shed for the county. The input/output model was constructed utilizing this six-county region consisting of Holmes, Tuscarawas, Guernsey, Muskingum and Knox Counties in addition to Coshocton County. The impact scenario presented is based on one new food processing plant being constructed in each of the five new industrial developments. Of the five new plants, four are projected at 200,000 sq. ft. and 300 new employees and the final one is projected at 340,000 sq. ft. and 426 employees. Additionally, the estimated cost of the water and sewer and road infrastructure needed to develop the park sites is also modeled for its impact during the construction phase. The food processing facilities include the construction impact of building the new plants and the annual impact of the production activity of the facilities when operational. CRD utilized the proposed cost of construction, development parameters and employment projections provided by the client and did not verify or assess the accuracy of the information provided.

DATA AND METHODOLOGY

IMPLAN is an input-output model that accounts for all dollar flows across different sectors of the economy of a region. Using this information, IMPLAN models the way a dollar injected into one sector (via output or payroll) is spent and re-spent in other sectors, generating waves of economic activity called multipliers. IMPLAN generates different multipliers that capture both indirect and induced impacts for employment, payroll, and output.

The size of these multipliers varies across each category and depends on four main factors:

- The overall size and economic diversity of the region's economy
- The geographic extent of the region and its role within the broader region
- The nature of the economic sectors under consideration
- National economic trends during the year of examination

IMPLAN GENERATED MULTIPLIERS ARE PRESENTED IN A RATIO:

$$\text{Multiplier} = \frac{\text{Direct} + \text{Indirect} + \text{Induced}}{\text{Direct}}$$

Therefore, a multiplier of 1.5 would represent a total of indirect and induced impact that is 50 percent of the total direct impact.

TWO TYPES OF MULTIPLIER EFFECTS:

BUSINESS TO BUSINESS IMPACTS (Indirect) occur when businesses spend their revenue on business expenses such as raw materials or production inputs or equipment and packaging. For example, if the new food processing facility purchases office furniture from a local manufacturer (the direct output), the purchases the furniture plant makes on new equipment for their facility constitute the indirect impact. Additionally, if a local hotel purchases food and drink for its bar, those expenses are an indirect economic output.

EMPLOYEE SPENDING IMPACTS (Induced) occur when employees spend their earnings on goods and services in the regional economy. For example, if an employee from one of the new plants spends a portion of their wages on retail, restaurants, or professional services, those are included as induced impacts.

ECONOMIC IMPACTS

The initial step was to determine the impact the development of the proposed industrial park sites. The amount of infrastructure varied by site, but in general, the cost of both offsite and onsite water and sewer lines and the roadways were included in the impact model. The region consists of six counties in SE

Ohio. The investment in the construction of the new infrastructure for the industrial park developments is just the beginning of the potential impacts associated with this potential project producing a strong estimated positive impact on the region. A construction project on this scale creates additional demand for products and services, some of which will be supplied by local producers, adding to the overall economic impact. The process involves following the dollars invested on the construction as they cycle through the economy. Finally, a third impact for the additional jobs associated with the new operations facilitated by the construction was calculated. All three models tract the direct investment, whether that is jobs or dollars, the indirect, or business to business spending and finally, the induced or employee spending impacts as they cycle through creating additional jobs, wages and contributions to the economic output.

CONSTRUCTION-INFRASTRUCTURE AND BUILDING CONSTRUCTION

In examining the proposed infrastructure and building construction activity, the projected impacts are based on a total investment of \$27.8 million dollars on offsite and onsite infrastructure and \$142.5 million for the construction of 1,140,000 sq. ft. in five new manufacturing facilities. The direct impact for both construction activities is \$170.3 million dollars over the period of construction supporting 1,357 jobs. The business-to-business spending or demands for regional products and services supports another \$24.2 million dollars in economic activity. It also accounts for an additional 143 jobs. In addition to the direct and business to business impacts, there are also impacts stemming from local workers having more expendable funds to be spent in the regional economy buying goods and services households need for their daily activity. This impact is an additional \$ 51 million dollars and supports 435 new jobs. Therefore, in total, the construction of infrastructure associate with the development of the new industrial parks and the construction of the new manufacturing facilities has an overall impact of \$245.6 million dollars and supports 1,935 jobs.

IMPACT OF INFRASTRUCTURE AND BUILDING CONSTRUCTION

	Direct	Business to Business	Employee Spending	Total
Employment	1358	142	434	1934
Sales/Output	\$170,363,500	\$24,224,322	\$50,958,327	\$245,546,149

OPERATIONS OF NEW FACILITIES

In examining the potential operations of five new plants, the impacts are based on a total of 1652 new employees at five new food processing facilities to be located in the new industrial park developments.

The direct impact is nearly \$626 million on an annual basis. The business-to-business spending or demands for local products and services supports another \$151.9 million in annual economic activity. It also accounts for an additional 1,317 jobs. In addition to the direct and business-to-business impacts, there are also impacts stemming from local workers having more expendable funds to be spent in the regional economy buying goods and services households need for their daily activity. This impact is an additional \$93.1 million on annual basis and supports an additional 794 jobs. Therefore, in total, the development of the industrial parks with five new facilities has an annual impact of close to \$871 million and supports 3,762 jobs.

	Direct	Business to Business	Employee Spending	Total
Employment	1652	1317	794	3762
Sales/Output	\$625,956,128	\$151,879,084	\$93,117,369	\$870,952,581

TOTAL IMPACT OF NEW PROJECTS AND PARK DEVELOPMENT

In total, the potential impact of the newly developed industrial parks and the construction of five new facilities will have a total direct impact of \$796.3 million and support 3,010 jobs. The business-to-business spending will have a potential impact of \$176.3 million and support 1,459 additional jobs. The potential impact of the employee/household spending is \$144 million and an additional 1,228 jobs. This project has an output multiplier effect of 1.40, meaning there is an additional .40 cents added to the economy for every \$1 in investment.

IMPACT OF NEW PROJECTS AND PARK DEVELOPMENT

	Direct	Business to Business	Employee Spending	Total
Employment	3010	1459	1228	5697
Sales/Output	\$796,319,628	\$176,103,406	\$144,075,696	\$1,116,498,730

ESTIMATED TAX IMPACTS

The model used to generate the economic impacts is also designed to provide a estimation of tax impacts based on the location and project parameters. The tax impacts are not local rates added to the model, but rather an estimation based on national data incorporated into the model matrix. The data is from several sources including: Bureau of Economic Analysis' (BEA) National Income and Product Accounts (NIPA), which includes the Personal Consumption Expenditure (PCE) totals; US Census Bureau's Consumer Expenditure Survey (CES); Annual Survey of State and Local Government Finances (SLGF) and finally, the Bureau of Economic Analysis' Regional Economic Accounts (REA).

The estimated tax impacts are provided for each of three activities, the operations of the projected new food processing plants, the construction of the plants and the construction of infrastructure required to develop the identified properties in job ready sites. If fully developed as projected in this impact scenario,

the total tax revenue generated would be nearly \$28.4 million. The table below breaks the estimated tax impacts down by type of tax and by the three primary activities.

ESTIMATED STATE AND LOCAL TAXES GENERATED

	Employee Compensation	Tax on Production and Imports	Households	Corporations	Grand Total
Infrastructure Construction	\$27,388	\$1,787,462	\$259,499	\$15,069	\$2,089,418
Facility Construction	\$214,534	\$4,036,725	\$1,827,069	\$40,556	\$6,118,884
New Plant Operations	\$479,904	\$15,910,340	\$3,784,597	\$139,811	\$20,314,652
Totals	\$721,826	\$21,734,527	\$5,871,165	\$65,145	\$28,392,663

COMMUNITY ASSESSMENT

With any strategic planning effort, gathering the feedback of local business leaders and civic leaders is an integral way to understand core community issues and discover new opportunities for growth. Involving participants from across the community also enables planners to gauge the likelihood that recommended strategies will be accepted and adopted.

Public engagement for Coshocton County was accomplished through targeted listening sessions with local business and community leaders.

LISTENING SESSIONS REPORT

On February 22, 2018 Montrose and the Coshocton County Port Authority economic development team conducted 3 listening sessions with elected officials and business and community leaders from across the County. The listening sessions had anywhere from 8 to 14 participants and included individuals from various sectors including from business, utilities, development, education, real estate, government, elected office, civic organizations, and not-for-profit organizations. In all, more than 30 individuals participated in the listening sessions. Each participant was given the questionnaire ahead of time included as Appendix A and asked to think through and answer the questions. The listening sessions were instructive and provided the Coshocton

County Port Authority team and Montrose team the opportunity to understand what the community wants to be. The challenges identified in the listening sessions fit into several different categories outlined in the chart below.

Each listening session provided its own flavor on the current state of economic development in the County and the future state of economic development in the County. Largely based on the participants, the tone and tenor were different for each session. Common elements came through in each session, however that can help guide the County in its decision-making process about economic development issues and investments. Taking the responses to the questionnaire and categorizing and summarizing the input from the listening sessions includes:

Coshocton County Port Authority Listening Sessions Top Identified Challenges

- Community is struggling with its identity
- Communication needs to improve between Port Authority, Industry and Education
- Existing Industry Support is essential
- Need more sites and buildings to compete
- Skilled labor gap
- Wood manufacturing is a big opportunity

Question	Comment
What do you think of when you think Coshocton County?	<ul style="list-style-type: none"> • Tourism, hospitality • Agriculture and business • Drugs and crime • Community struggling with its identity • Home • Strength is our people • Small town • Great place to raise a family • Friendly people • Dying community • Stagnant, little growth • Voted number one redneck community in Ohio by Buzzfeed • Fairly strong and diverse manufacturing base • We focus on what we lost and now what we have • We are difficult to do business with right now • Cooperativeness, people working together, neighbor helping neighbor • Outdoor sports and activities, hunting, fishing and recreation • low cost of doing business

<p>What is your understanding/impression of economic development efforts of Coshocton County? How would you rate its effectiveness?</p>	<ul style="list-style-type: none"> • ED is splintered and fragmented. Not one goal or vision. • Community has unrealistic expectations of what Port should be doing • Port should continue support of existing industry • Communication gap; need to unify business/industry and education • County and other governments deserve credit for having an economic development organization • Wood manufacturing in northern part is a great opportunity • Great at building relationships with existing businesses • Sites and building inventory is desperately lacking • Organizations are understaffed and underfunded across the board; leaders aren't able to think and dream because they have to do • Coordination between organizations in County is not great. • Port Authority Focus: Existing Industry Support; Attraction and Marketing; Site and Building Inventory, site development (Coshocton needs an industrial park) • Coshocton First, need to do business better with each other. • Targeted marketing and need something to market, need to see a building or land that can be developed that is not in a flood plan • Focus: in past have always been looking for home run; need to look for singles and doubles
<p>What occupations and industries does Coshocton County need to focus its workforce developments efforts on to capitalize on the jobs of the future?</p>	<ul style="list-style-type: none"> • Food, distilleries, breweries • Technology. Medical Coating. Robotics and fulfillment • Wood products • Aerospace

What educational and training programs are not being addressed with today's workforce efforts in Coshocton County?	<ul style="list-style-type: none"> • Career centers are not teaching kids for vocations needed in the community • Companies need the support to train employees on the job • Have issues with life skills, coming to work on time • Skilled trades • Losing top students but don't have opportunities for them to come back • Scholarships for apprenticeships and journeyman for skilled trade • Succession planning for companies
What sectors should we focus on to encourage economic growth (manufacturing, warehousing, retail, housing)?	<ul style="list-style-type: none"> • People need shopping and social activities in addition to a job • Millennials work to live and not live to work • Tourism • Recreation. Hunting and Fishing
How would you define success a decade from now regarding economic development?	<ul style="list-style-type: none"> • Series of small wins to rebrand and achieve large success • Make sure that we met the goals in the plan • Stable and growing population • Drive up Main St and it's not a total disaster • Having some wins • Encouraging startups • Taking care of existing industry • Need a champion; lot of doers and not enough leaders • People who want to work can find meaningful employment • Progress • Need to be grooming next round of leaders. Next generation • Four-lane highway. 7 miles in Coshocton County • Need to know we are never successful. We need to get better every day
Are the business and education communities adequately aligned and communicating to address workforce issues?	<ul style="list-style-type: none"> • Kids are leaving high school that are not prepared to enter workforce • Schools are teaching to state requirements not for jobs • Kids don't have life skills, parents are not providing those skills • Directory of businesses

COSHOCTON PORT AUTHORITY BUSINESS/INDUSTRIAL PARK STRATEGIC PLAN GOALS, OBJECTIVES, STRATEGIES AND TACTICS

Goals

- Make Coshocton County the premier destination in the Midwest for food processing and wood manufacturing companies

Objectives

- By 2025
- 500 new jobs
- increase the median family income by \$2000
- \$25,000,000 in new payroll
- \$100,000,000 in new capital investment

Strategies

- Capitalize on energy intensive industries
- Focus on food and wood manufacturing industries
- Develop sites for 21st Century manufacturing

Tactics

- Prepare the Sabic site and Paper Mill Road site to attract food processing and wood products manufacturing companies
- Coshocton Port Authority should implement an existing industry support program to provide expansion and workforce assistance
- Coshocton Port Authority should leverage APEG and JobsOhio to launch an attraction and marketing campaign aimed at food processing companies
- Coshocton Port Authority should engage wood manufacturers in the County and in neighboring counties to understand their transportation needs to help them grow
- Coshocton Port Authority should work with its education partners to establish an occupational marketing campaign to provide a pipeline of manufacturing workers
- Coshocton Port Authority should launch a fundraising campaign to attract additional public and private sector dollars to the organization

COSHOCTON COUNTY ECONOMIC DEVELOPMENT STRATEGIES

Economic development strategies are broader than specific tactics but focused on achieving the goals and objectives of an economic development plan. Coshocton County’s four prime economic development strategies should focus efforts on energy intensive industries based upon the availability of low cost natural gas in the region that should include retaining and attracting companies in the food processing industry, expand the wood manufacturing base of employment spilling over from neighboring Holmes County and grow 21st Century industrial sites that address manufacturers needs at the site and with the availability of a skilled workforce.

Coshocton’s 4 Prime Economic Development Strategies

- Focus on Energy Intensive Industries
- Grow Food Processing Manufacturing
- Expand Wood Manufacturing
- Create 21st Century Manufacturing Sites

FOCUS ON ENERGY INTENSIVE INDUSTRIES

Record-low energy prices driven by domestic production of renewable and non-renewable sources of energy create substantial opportunities for the retention and recruitment of companies that will tolerate other higher costs of production, like wages, a region may have if they can secure lower energy prices. In essence, for certain firms, energy costs are so high that lower energy prices are the most important factor impacting their decision as to where to locate a corporate facility. If energy intensive industries are worthy of attention, the next step is to determine who to attract the high-wage jobs in these industries. The first

Energy Intensive Industries

- Paper manufacturing, including paper and paperboard mills
- Chemical manufacturing including basic chemicals, petrochemicals, alkalis and chlorine
- Primary metals including iron, steel, ferroalloy, aluminum production and processing
- Cement and lime production and processing
- Food processing

step is to identify regional market strengths and connect them with energy-intensive industries. Economic strengths are understood through industry cluster or market analysis. Regions with access to domestic energy should focus on energy-intensive industries. 30 percent of the U.S.’s energy consumption is tied to the American industrial sector. As the U.S. Energy Information Agency graph below illustrates such energy-intensive industry sectors include chemical, aluminum, glass, food products, cement and lime, iron, steel, paper and pulp, glass and refining.

Second, the energy that is being produced in a region must be captured to serve that region. Efforts to retain and attract energy-intensive companies first must solve the infrastructure puzzle that will connect their community to the oil, natural gas and even electricity flowing from new local sources. Traditional

infrastructure tools such tax increment financing, tax exempt bond financing, local, state and federal grants all come into play to fund the “last mile connection” from the massive national natural gas pipeline network shown below. Third, regions looking to attract energy-intensive companies need to develop economic development incentives to retain and attract these companies but a particular focus needs to center on a workforce certified to by ready from day one to work in the industry they are recruiting. Regions should focus on creating a workforce pipeline to develop a pool of workers trained and ready to work in the facilities for the industry in which they are required. Fourth, regions need to develop sites to fit the unique needs of the targeted energy-intensive companies. Regions looking to capture energy-intensive sites need to develop large scale sites with power, road, direct rail, and, in many cases, water access. The infrastructure needs to be in place to ensure the site is shovel-ready. Again, traditional infrastructure tools such as tax increment financing, utility partnerships, and local, state and federal funding will be needed to develop these sites. Finally, the region’s energy-intensive industry strength needs to be connected with a marketing campaign. First, a deep dive needs to occur within the targeted energy-intensive industries to create a target list of companies. This industry and the list of companies should be targeted for a marketing strategy built on regional brand awareness tied to this industry as well as social media, earned media, paid media, trade association and conference participation and, ultimately through direct recruitment. As with all economic development strategy, energy-intensive firms are retained and attracted through a public policy and economic development approach that provides them not only with low-cost energy, but also offers land use tools, site infrastructure funding, tax policy, and workforce policy. All of this is driven to build a high-quality of life for a region and make it attractive to firms interested in connecting with a region’s low-cost industry. Coshocton is at the center of Ohio’s shale energy revolution with multiple natural gas pipelines running through the county.

FOCUS ON FOOD PROCESSING

As the United States has become more energy independent with the shale energy boom of the last decade it has created opportunities for locations that have assets strategically available to attract companies that are dependent upon energy for the output of its products. The food products sector is an industry worthy of review. The North American Industry Classification Sector (NAICS) defines this sector in the following way: Industries in the Food

Manufacturing subsector transform livestock and agricultural products into products for intermediate or final consumption. The industry groups are distinguished by the raw materials (generally of animal or vegetable origin) processed into food products. The food products manufactured in these establishments

Food Processing Marketplace

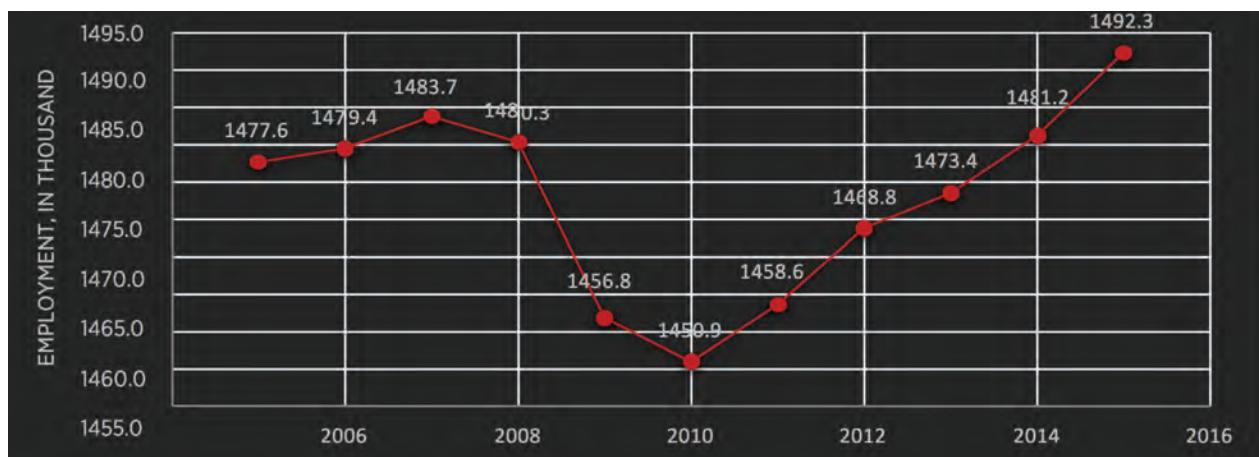
- 1,162 T BTU of Energy User
- \$970.3 B Gross Domestic Output
- 1.48M workers
- 25% growth
- FDI tripled

are typically sold to wholesalers or retailers for distribution to consumers, but establishments primarily engaged in retailing bakery and candy products made on the premises not for immediate consumption are included.

In 2013 the food products industry used 1,162 trillion BTU of energy with 75,407 million kwh coming from electricity and 567 billion cu. ft. coming from natural gas. According to the US Bureau of Economic Analysis the Gross Domestic Output of the food products industry is \$970.3 billion as of November 5, 2015. The food products industry has seen 25 percent growth in gross domestic product from 2008-2014. Further evidence of the strength of the Food Products industry is the foreign direct investment into the United States made by companies in this industry from 2008 to 2014. According to the U.S. Bureau of Economic Analysis foreign owned firms in the Food Products industry invested \$25.7 million USD in the United States in 2008 and more than tripled that investment to \$83.67 million USD by 2014.

Employment in this industry, while dipping in 2009-2011 due to the recession, is steady and is on the rise. In October 2015 the Food Products industry had employment of 1.48 million, an increase of 1.03 percent year over year. In the last 5 years, employment in the Food Products sector has grown 3.07 percent. The chart below shows the changes in employment in the Food Products sector in the past 10 years.

FOOD PRODUCTS INDUSTRY EMPLOYMENT



Source: http://data.bls.gov/timeseries/CES3231100001?data_tool=XGtable

The Food Products industry has 25,614 US establishments with \$15.39 billion in capital expenditures in 2012 according to the American Fact Finder. The top companies in the industry:

Company	Sales (Millions, \$)	Employees	Location
Cargill	\$120,400.00	155,000	Wayzata, MN
Nestle SA	\$92,829.58	339,000	Vevey, Vaud Switzerland
Archers-Daniels- Midland	\$81,201.00	33,900	Chicago, IL
Mitsubishi	\$74,099.31	71,994	Chiyoda-Ku, Tokyo, Japan
Pepisco	\$66,683.00	271,000	Purchase, NY

Source: Hoovers.com

For communities, regions and states that have strong access to reliable and low-cost energy, a strategy of trying to attract companies in the Food Products industry is logical and warranted. Energy is certainly not the only reason that companies chose a location, but 91.6 percent of the respondents in the 2014 Area Development Magazine Site Consultant's Survey listed energy availability and costs as very important to their clients. The Food Products industry has seen steady and solid growth over the last five years and with low energy costs and steady commodity prices the industry will continue this growth pattern and solid employment trend for the next five years. In the last decade Gross Domestic Output of the Food and Beverage processing industry in the United States has increased by 35% from \$715,590,000,000 to \$963,104,000,000. For comparison, the Gross Domestic Output of companies making machinery in the United States in that same timeframe has only increased by 6%. What is most amazing is that the Food and Beverage Processing industry did not see a decrease in the Great Recession of 2008-2010; the Gross Domestic Output of the industry during that time increased by 4% through that period. Appendix "K" shows a list of the Top 100 Food Processing Companies by sales volume.

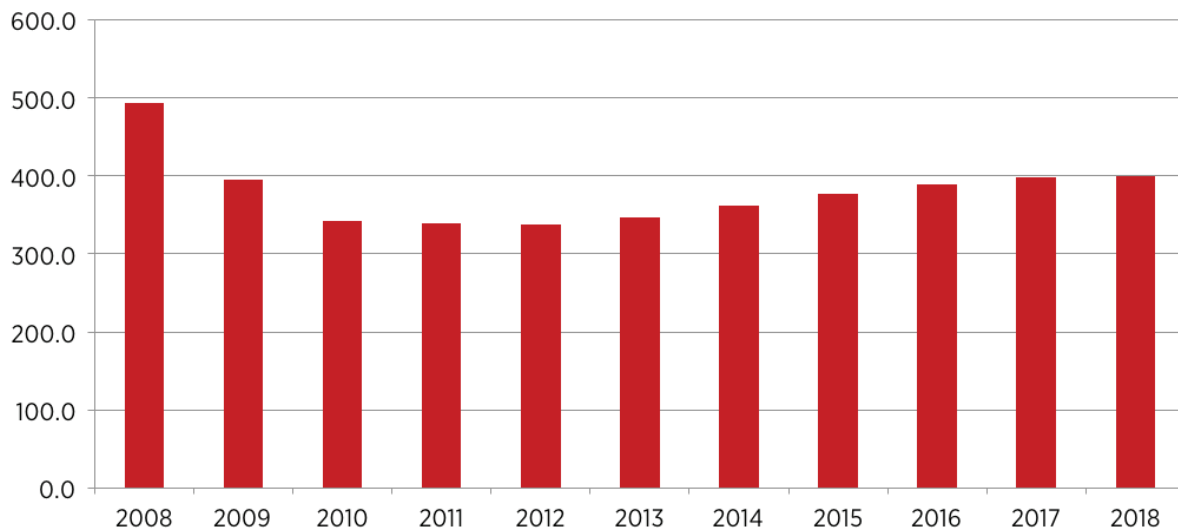
WOOD PRODUCT MANUFACTURING

The Wood Manufacturing industry is nascent in Coshocton County but is rapidly growing and should be a focus area to grow jobs in the County. According to the U.S. Bureau of Labor Statistics, industries in the Wood Product Manufacturing subsector manufacture wood products, such as lumber, plywood, veneers, wood containers, wood flooring, wood trusses, manufactured homes (i.e., mobile homes), and prefabricated wood buildings. The production processes of the Wood Product Manufacturing subsector include sawing, planing, shaping, laminating, and assembling of wood products starting from logs that are cut into bolts, or lumber that then may be further cut, or shaped by lathes or other shaping tools. The lumber or other transformed wood shapes may also be subsequently planed or smoothed, and assembled into finished products, such as wood containers and furniture. The Wood Product Manufacturing subsector includes establishments that make wood products from logs and bolts that are sawed and shaped, and establishments that purchase sawed lumber and make wood products. With the exception of sawmills

and wood preservation establishments, the establishments are grouped into industries mainly based on the specific products manufactured. The wood product manufacturing subsector consists of these industry groups:

- Sawmills and Wood Preservation: NAICS 3211;
- Veneer, Plywood, and Engineered Wood Product Manufacturing: NAICS 3212; and
- Other Wood Product Manufacturing: NAICS 3219.

AMERICAN WOOD PRODUCT EMPLOYMENT TOTALS (THOUSANDS)



Source: U.S. Bureau of Labor Statistics

As the table above indicates, the number of wood product workers is increasing in the United States which illustrates the industry's strength. Most importantly, according to the Bureau of Labor Statistics, American wood product workers earn \$20.09 an hour which is above the national average.

In the listening sessions it was suggested by people that work with these companies that the owners are not often open to discussions, but their major concern is getting products to market. A secondary concern is finding buildings to purchase or lease for production. The Appalachian Partnership for Economic Growth (APEG) estimates that the Wood industry contributes \$225M to the Coshocton economy and support 839 employees.

HIGHEST CONTRIBUTING COUNTIES PER CAPITA WOOD INDUSTRY CLUSTERS

County	Impact Per Capita	Economic Impact	Employees	Wood Industry Percentage of County's Total Output
Holmes	\$15,036	\$660M	4,302	36.4%
Ross	\$14,115	\$1.09B	2,678	42.1%
Vinton	\$8,021	\$106M	613	50.6%
Coshocton	\$6,157	\$225M	839	15.8%
Pike	\$5,294	\$150M	653	14.1%

Note. Author calculation from IMPLAN Version 3.1. Economic Impact Per Capita calculation used population figures from the U.S. Census Bureau, Population Estimates Program (PEP). Retrieved from <http://www.census.gov/popest/index.html>

Source: Appalachian Partnership for Economic Growth

21ST CENTURY MANUFACTURING SITES

Modern manufacturing facility recruitment does not just involve “preparing a site and they will come.” No doubt manufacturing companies will seek a site that fits their land use, power, and infrastructure needs. However, the availability of tax incentives and the availability of skilled labor is just as important for the recruitment of the manufacturing industry. Many communities in Coshocton County have jobs open and going unfilled. Ohiomeansjobs.org is the state of Ohio web portal that connects employers with open jobs with workers seeking jobs. According to Ohiomeansjobs.org, Coshocton, Ohio has 289 open jobs within 10 miles of the County seat. Of those jobs, 28 are in the trucking industry, 37 are in the medical field and 10 are in the manufacturing industry. Coshocton County is battling aggressively to retain and attract new manufacturing jobs, but they must provide talent for these open jobs if they are to attract new employees.

COSHOCTON COUNTY ECONOMIC DEVELOPMENT ACTION PLAN TACTICS

Economic development action plan tactics are specific steps that provide a roadmap for a community to achieve the goal and objectives and implement the strategies all tied to economic growth. Coshocton Port Authority should implement six action plan tactics that include:

1. Prepare the Sabic site and Paper Mill Road site to attract food processing and wood products manufacturing companies.
2. Coshocton Port Authority should implement an existing industry support program to provide expansion and workforce assistance
3. Coshocton Port Authority should leverage APEG and JobsOhio to launch an attraction and marketing campaign aimed at food processing companies
4. Coshocton Port Authority should engage wood manufacturers in the County and in neighboring counties to understand their transportation needs to help them grow
5. Coshocton Port Authority should work with its education partners to establish an occupational marketing campaign to provide a pipeline of manufacturing workers
6. Coshocton Port Authority should launch a fundraising campaign to attract additional public and private sector dollars to the organization

*Coshocton Port Authority Strategic Plan Action Step # 1-
Prepare the Sabic site and Paper Mill Road site to attract food
processing and wood products manufacturing companies.*

- Secure infrastructure funding from US Economic Development Administration and JobsOhio for the Sabic site and Paper Mill Road Site.
- Secure development agreements with owners of Sabic Site.
- Develop an incentive policy and tools for each site to attract food processing and wood manufacturing companies.

Based on the infrastructure analysis for the five sites studied in this report for an industrial park, the Sabic Site and the Paper Mill Road sites are the closest to being market-ready with the lowest capital outlay to make each site “Job-ready” and marketable. Coshocton Port Authority should prioritize investment in

these sites from 2018-2020. Once funding has been secured for these sites and infrastructure has been put in place, the Port Authority should secure infrastructure funding from 2021-2023 for Greenfield Site #1, Greenfield site #2 and the Shelly Materials site.

SABIC (FORMER GE) SITE INFRASTRUCTURE SUMMARY

The cost of off-site and on-site infrastructure at the Sabic Site is approximately \$2,972,000.

Off-Site		
Infrastructure Type	Improvement Description	Estimated Probable Project Cost*
Sanitary Sewer	None needed – site is already served	\$0
Water Lines	None needed – site is already served	\$0
Roadway	1. Span wire traffic signal 2. 600' eastbound left turn lane on US36 3. 300' westbound right turn lane on US36	1. \$175,000 2. \$420,000 3. 210,000 Sub-Total = \$805,000
	Off-Site Total	\$805,000
On-Site		
Infrastructure Type	Improvement Description	Estimated Probable Project Cost*
Sanitary Sewer	1. 1,100 ft 10" sanitary sewer	1. \$277,200 Sub-Total = \$277,200
Water Lines	1. 2,500 ft of 12" water main to create looped supply line	1. \$770,000 Sub-Total = \$770,000
Roadway	1. 1,000 ft of new roadway	1. \$1,120,000 Sub-Total = \$1,120,000
	On-Site Total	\$2,167,200

PLAN FOR FUNDING SABIC (FORMER GE) SITE INFRASTRUCTURE

The cost to make this site job ready is \$2,972,200. The site is 65.11 acres. Spreading the cost of the infrastructure over the site is \$45,648 per acre, a heavy burden for the site to be competitive. Knowing that the site will have to sell for \$25,000 to \$35,000 an acre to be competitive with the industrial parks benchmarked in Muskingum and Tuscarawas Counties, the Port Authority should seek funding through the US Department of Commerce, Economic Development Administration (US EDA) for this infrastructure cost. The Port Authority should seek a grant of \$3,000,000 from US EDA. The Port Authority should seek support from APEG and JobsOhio for this request to US EDA. The US EDA Public Works and Economic Development Assistance Programs provides funds for construction of infrastructure in underserved communities to enable them to be more economically competitive. Funding is awarded on a competitive basis and is done through a rolling application period through the EDA regional office in Chicago. Awards can range from \$100,000 to \$3,000,000. The grant will cover the cost of infrastructure on the site of \$2,972,000. This allows the owners of the Sabic Property to sell the

property for \$25,000 to \$35,000 per acre and realize revenue of \$1,627,750 to \$2,278,850. This also allows the Port Authority to offer an enterprise zone property tax abatement on the property rather than having to implement a Tax Increment Financing District to fund the infrastructure costs. Based on an analysis of projects completed in the benchmarked industrial parks in Tuscarawas and Muskingum Counties, the Port Authority will need to offer 50% to 100% abatement for a period of 10 years. The amount of tax abatement provided should be commensurate with the new job commitment and capital investment commitment of the company locating the Sabic site.

DEVELOPMENT AGREEMENT WITH THE SABIC SITE OWNERS

In order for the Port Authority to achieve success in its ability to develop the Sabic site it must get control of the site. The Port Authority can choose to own each site or enter into development agreements with property owners that determines the price and timing that sites will be taken down once a prospect is in hand. Having to use grant dollars to fund infrastructure to the site and in the absence of additional funding to purchase the Sabic site, the Port Authority must obtain rights to develop the sites as industrial. The Port Authority should secure the development rights to those sites as quickly as possible so that the owners of those sites do not sell them to uses that will not bring new jobs to the County. The Port Authority should engage with its legal counsel to develop agreements that can be negotiated and signed with each property owner. In most circumstances an entity like the Port Authority would need to pay options to the property owner to control the site for development. The Port Authority will be providing infrastructure to the site and on the site making it more valuable than it is today. For providing that infrastructure and for marketing the site on behalf of the property owners, the Port Authority should ask that it not have to provide options for site. The Port Authority should also seek an agreement with the Sabic site owners that splits a portion of the revenues from land sales with the Port Authority.

PAPER MILL ROAD SITE INFRASTRUCTURE SUMMARY

The cost to provide infrastructure to the Paper Mill Rd Site is approximately \$770,000.

Off-Site		
Infrastructure Type	Improvement Description	Estimated Probable Project Cost*
Sanitary Sewer	1. 100gpm pump station at northwest corner of site discharging to the existing force main installed to serve the ethanol plant	1. \$280,000 Sub-Total = \$280,000
Water Lines	None – site is served by an existing 10” main along Paper Mill Road	\$0

Roadway	1. Span wire traffic signal 2. 300' westbound left turn lane on SR83 3. 150' eastbound right turn lane on SR83	1. \$175,000 2. \$210,000 3. 105,000 Sub-Total = \$490,000
	Off-Site Total	\$770,000
On-Site		
Infrastructure Type	Improvement Description	Estimated Probable Project Cost*
Sanitary Sewer	None needed – assumes property will be developed as a single project	\$0
Water Lines	None needed – assumes property will be developed as a single project	\$0
Roadway	None needed – assumes property will be developed as a single project	\$0
	Off-Site Total	\$0

PLAN FOR FUNDING PAPER MILL RD SITE INFRASTRUCTURE

The cost to make this site job ready is \$770,000. The site is 22.71 acres. Spreading the cost of the infrastructure over the site is \$33,905 per acre, a heavy burden for the site to be competitive. Knowing that the site will have to sell for \$25,000 to \$35,000 an acre to be competitive with the industrial parks benchmarked in Muskingum and Tuscarawas Counties, the Port Authority should seek funding through JobsOhio for this infrastructure cost. The Port Authority should seek a grant of \$500,000 and a loan of \$270,000 from JobsOhio. The Port Authority should seek support from APEG for this request to JobsOhio. The loan should be structured so that principal and interest payments are made once the property is sold. The grant will bring down the cost of infrastructure burden on the site to \$270,000. Spreading that burden over the 22.71 acres is \$11,889 per acre. This allows the Port Authority to sell the property for \$20,000 to \$25,000 per acre, pay off the loan to JobsOhio, and realize revenue to the Port Authority of \$184,000 to \$297,750. This also allows the Port Authority to offer an enterprise zone property tax abatement on the property rather than having to implement a Tax Increment Financing District to fund the infrastructure costs. Based on an analysis of projects completed in the benchmarked industrial parks in Tuscarawas and Muskingum Counties, the Port Authority will need to offer 50% to 100% abatement for a period of 10 years. The amount of tax abatement provided should be commensurate with the new job commitment and capital investment commitment of the company locating the Paper Mill Rd site.

ADDITIONAL INDUSTRIAL SITES, ESTIMATES OF PROBABLE PROJECT COSTS

Water, sewer and transportation infrastructure demands for each site were estimated based on a mix of development between typical commercial/warehouse/industrial and the proposed targeted industries. The water and sewer demands account for demand associated with household uses for employees and

processes in the targeted industries (see calculations in Appendix “G”). Demand for electricity, gas and telecommunications infrastructure have not yet been estimated as private utility companies work with specific user to determine their demands and then calculate what (if any) cost will be borne by the user to provide service.

Appendix “H” includes a summary of parameters and assumptions on which the estimates of probable project costs are based. The following tables indicate the on-site and off-site improvements need for each of the identified sites.

GREENFIELD SITE #1 INFRASTRUCTURE SUMMARY

The cost to provide infrastructure to Greenfield Site #1 is approximately \$12,034,400.

Off-Site		
Infrastructure Type	Improvement Description	Estimated Probable Project Cost*
Sanitary Sewer	1. Increase capacity of existing pump station at the west end of CR 1a from 500gpm to 750gpm 2. 15,300 ft of 6” diameter force main 3. 250gpm pump station at southwest corner of site	1. \$1,050,000 2. \$2,356,200 3. \$420,000 Sub-Total = \$3,826,200
Water Lines	1. 4,000 ft of 12” water main	1. \$1,232,000 Sub-Total = \$1,232,000
Roadway	1. Span wire traffic signal 2. 600’ eastbound left turn lane on US36 3. 300’ westbound right turn lane on US36	1. \$175,000 2. \$420,000 3. 210,000 Sub-Total = \$805,000
	Off-Site Total	\$5,863,200
On-Site		
Infrastructure Type	Improvement Description	Estimated Probable Project Cost*
Sanitary Sewer	1. 2,000 ft 8” sanitary sewer 2. 1,600 ft 10” sanitary sewer	1. \$420,000 2. \$403,200 Sub-Total = \$823,200
Water Lines	1. 5,300 ft of 12” water main (looped through site to existing 10” along CR10)	1. \$1,484,000 Sub-Total = \$1,484,000
Roadway	1. 3,450 ft of new roadway	1. \$3,864,000 Sub-Total = \$3,864,000
	Off-Site Total	\$6,171,200

PLAN FOR FUNDING GREENFIELD SITE #1 INFRASTRUCTURE

The cost to make this site job ready is \$12,034,400. Off-site infrastructure is \$5,863,200. Due to the large investment to make this site job ready, the Port Authority should focus on bringing off-site infrastructure to the site. The usable acres on the site is 250.71 acres. Spreading the cost of the infrastructure over

the site is \$23,386 per acre, a heavy burden for the site to be competitive. Knowing that the site will have to sell for \$25,000 to \$35,000 an acre to be competitive with the industrial parks benchmarked in Muskingum and Tuscarawas Counties, the Port Authority should seek a second round of funding through the US Department of Commerce, Economic Development Administration (US EDA) for this infrastructure cost. The Port Authority should seek a grant of \$3,000,000 from US EDA. The Port Authority should seek support from APEG and JobsOhio for this request to US EDA. The US EDA Public Works and Economic Development Assistance Programs provides funds for construction of infrastructure in underserved communities to enable them to be more economically competitive. Funding is awarded on a competitive basis and is done through a rolling application period through the EDA regional office in Chicago. Awards can range from \$100,000 to \$3,000,000. The grant will cover more than half of the cost of infrastructure on the site. The rest of the cost of infrastructure \$2,863,200 can be spread over the cost of the land at \$11,420. The Port Authority can work with the landowner to secure a loan from a community bank, or through JobsOhio or USDA for the infrastructure that is paid for once the land is sold. This allows the owners of the Greenfield to sell the property for \$35,000 per acre and realize revenue of \$5,911,506. This also allows the Port Authority to offer an enterprise zone property tax abatement on the property rather than having to implement a Tax Increment Financing District to fund the infrastructure costs. Based on an analysis of projects completed in the benchmarked industrial parks in Tuscarawas and Muskingum Counties, the Port Authority will need to offer 50% to 100% abatement for a period of 10 years. The amount of tax abatement provided should be commensurate with the new job commitment and capital investment commitment of the company locating at the Greenfield Site #1.

DEVELOPMENT AGREEMENT WITH THE GREENFIELD SITE #1 OWNERS

In order for the Port Authority to achieve success in its ability to develop the Greenfield Site #1 it must get control of the site. The Port Authority can choose to own each site or enter into development agreements with property owners that determines the price and timing that sites will be taken down once a prospect is in hand. Having to use grant dollars to fund infrastructure to the site and in the absence of additional funding to purchase the site, the Port Authority must obtain rights to develop the sites as industrial. The Port Authority should secure the development rights to the sites as quickly as possible so that the owners of those sites do not sell them to uses that will not bring new jobs to the County. The Port Authority should engage with its legal counsel to develop agreements that can be negotiated and signed with each property owner. In most circumstances an entity like the Port Authority would need to pay options to the property owner to control the site for development. The Port Authority will be providing infrastructure to the site and on the site making it more valuable than it is today. For providing that infrastructure and for marketing the site on behalf of the property owners, the Port Authority should ask

that it not have to provide options for site. The Port Authority should also seek an agreement with the site owners that splits a portion of the revenues from land sales with the Port Authority.

GREENFIELD SITE #2 INFRASTRUCTURE SUMMARY

The cost to provide infrastructure to this site is approximately \$8,402,800.

Off-Site		
Infrastructure Type	Improvement Description	Estimated Probable Project Cost*
Sanitary Sewer	1. Upgrade existing pump station at Trailer Ct to a capacity of 210gpm 2. 85gpm pump station at the southwest corner of the site 3. 800 ft of 4" force main	1. \$350,000 2. \$280,000 3. 100,800 Sub-Total = \$730,800
Water Lines	1. 4,400ft of 8" water main	1. \$800,800 Sub-Total = \$800,800
Roadway	1. Span wire traffic signal 2. 300' eastbound left turn lane on US36 3. 150' westbound right turn lane on US36	1. \$175,000 2. \$210,000 3. 105,000 Sub-Total = \$490,000
	Off-Site Total	\$2,021,600
On-Site		
Infrastructure Type	Improvement Description	Estimated Probable Project Cost*
Sanitary Sewer	1. 1,200 ft 8" sanitary sewer 2. 1,200 ft 10" sanitary sewer	1. \$252,000 2. \$302,400 Sub-Total = \$554,400
Water Lines	1. 3,000 ft of 8" water main (looped through site to)	1. \$462,000 Sub-Total = \$462,000
Roadway	1. 3,300 ft of new roadway	1. \$3,696,000 Sub-Total = \$3,696,000
	Off-Site Total	\$4,712,400

PLAN FOR FUNDING GREENFIELD SITE #2 INFRASTRUCTURE

The cost to make this site job ready is \$8,402,800. Off-site infrastructure is \$3,421,600. Due to the large investment to make this site job ready, the Port Authority should focus on bringing off-site infrastructure to the site. The usable acres on the site is 109.16 acres. Spreading the cost of the infrastructure over the site is \$31,344 per acre, a heavy burden for the site to be competitive. Knowing that the site will have to sell for \$25,000 to \$35,000 an acre to be competitive with the industrial parks benchmarked in Muskingum and Tuscarawas Counties, the Port Authority should seek funding through JobsOhio for this infrastructure cost. The Port Authority should seek a grant of \$1,500,000 and a loan of \$1,921,600 from JobsOhio. The Port Authority should seek support from APEG for this request to JobsOhio. The loan should be structured so that principal and interest payments are made once the property is sold.

The grant will bring down the cost of infrastructure burden on the site to \$1,921,600. Spreading that burden over the 109.16 acres is \$17,603 per acre. This allows the owners of the site to sell the property for \$35,000 per acre, pay off the loan to JobsOhio, and realize revenue of \$1,899,056. This also allows the Port Authority to offer an enterprise zone property tax abatement on the property rather than having to implement a Tax Increment Financing District to fund the infrastructure costs. Based on an analysis of projects completed in the benchmarked industrial parks in Tuscarawas and Muskingum Counties, the Port Authority will need to offer 50% to 100% abatement for a period of 10 years. The amount of tax abatement provided should be commensurate with the new job commitment and capital investment commitment of the company locating at the site.

DEVELOPMENT AGREEMENT WITH THE GREENFIELD SITE #2 OWNERS

In order for the Port Authority to achieve success in its ability to develop the Greenfield Site #2 it must get control of the site. The Port Authority can choose to own each site or enter into development agreements with property owners that determines the price and timing that sites will be taken down once a prospect is in hand. Having to use grant dollars to fund infrastructure to the site and in the absence of additional funding to purchase the site, the Port Authority must obtain rights to develop the sites as industrial. The Port Authority should secure the development rights to this site as quickly as possible so that the owners of those sites do not sell them to uses that will not bring new jobs to the County. The Port Authority should engage with its legal counsel to develop agreements that can be negotiated and signed with each property owner. In most circumstances an entity like the Port Authority would need to pay options to the property owner to control the site for development. The Port Authority will be providing infrastructure to the site and on the site making it more valuable than it is today. For providing that infrastructure and for marketing the site on behalf of the property owners, the Port Authority should ask that it not have to provide options for site. The Port Authority should also seek an agreement with the site owners that splits a portion of the revenues from land sales with the Port Authority.

SHELLY SITE INFRASTRUCTURE SUMMARY

The cost to provide infrastructure to this site is approximately \$3,684,100.

Off-Site		
Infrastructure Type	Improvement Description	Estimated Probable Project Cost*
Sanitary Sewer	1. 5,300 ft of 4" diameter force main	1. \$667,800
	2. 100gpm pump station at southeast corner of site	2. \$280,000 Sub-Total = \$947,800
Water Lines	1. 3,300 ft of 10" water main to create looped supply line	1. \$808,500 Sub-Total = \$808,500

Roadway	1. Span wire traffic signal 2. 300' eastbound left turn lane on US36 at CR495 3. 150' westbound right turn lane on US36 at CR495	1. \$175,000 2. \$210,000 3. 105,000 Sub-Total = \$490,000
	Off-Site Total	\$2,246,300
On-Site		
Infrastructure Type	Improvement Description	Estimated Probable Project Cost*
Sanitary Sewer	1. 1,900 ft 8" sanitary sewer	1. \$345,800 Sub-Total = \$345,800
Water Lines	1. 800 ft of 10" water main	1. \$196,000 Sub-Total = \$196,000
Roadway	1. 800 ft of new roadway	1. \$896,000 Sub-Total = \$896,000
	Off-Site Total	\$1,437,800

PLAN FOR FUNDING SHELLY SITE INFRASTRUCTURE

The cost to make this site job ready is \$3,684,100. The usable acres on the site is 120.34 acres. Spreading the cost of the infrastructure over the site is \$30,614 per acre, a heavy burden for the site to be competitive. Knowing that the site will have to sell for \$25,000 to \$35,000 an acre to be competitive with the industrial parks benchmarked in Muskingum and Tuscarawas Counties, the Port Authority should seek a second round of funding through the US Department of Commerce, Economic Development Administration (US EDA) for this infrastructure cost. The Port Authority should seek a grant of \$3,000,000 from US EDA. The Port Authority should seek support from APEG and JobsOhio for this request to US EDA. The US EDA Public Works and Economic Development Assistance Programs provides funds for construction of infrastructure in underserved communities to enable them to be more economically competitive. Funding is awarded on a competitive basis and is done through a rolling application period through the EDA regional office in Chicago. Awards can range from \$100,000 to \$3,000,000. The grant will cover more than half of the cost of infrastructure on the site. The rest of the cost of infrastructure \$684,100 can be spread over the cost of the land at \$5,684. The Port Authority can work with the landowner to secure a loan from a community bank, or through JobsOhio or USDA for the infrastructure that is paid for once the land is sold. This allows the owners of the Shell to sell the property for \$25,000 per acre and realize revenue of \$2,324,400. This also allows the Port Authority to offer an enterprise zone property tax abatement on the property rather than having to implement a Tax Increment Financing District to fund the infrastructure costs. Based on an analysis of projects completed in the benchmarked industrial parks in Tuscarawas and Muskingum Counties, the Port Authority will need to offer 50% to 100% abatement for a period of 10 years. The amount of tax abatement provided should be commensurate with the new job commitment and capital investment commitment of the company locating at the Shelly Site.

DEVELOPMENT AGREEMENT WITH THE SHELLY SITE OWNERS

In order for the Port Authority to achieve success in its ability to develop the Shelly Site it must get control of the site. The Port Authority can choose to own each site or enter into development agreements with property owners that determines the price and timing that sites will be taken down once a prospect is in hand. Having to use grant dollars to fund infrastructure to the site and in the absence of additional funding to purchase the site, the Port Authority must obtain rights to develop the sites as industrial. The Port Authority should secure the development rights to the sites as quickly as possible so that the owners of those sites do not sell them to uses that will not bring new jobs to the County. The Port Authority should engage with its legal counsel to develop agreements that can be negotiated and signed with each property owner. In most circumstances an entity like the Port Authority would need to pay options to the property owner to control the site for development. The Port Authority will be providing infrastructure to the site and on the site making it more valuable than it is today. For providing that infrastructure and for marketing the site on behalf of the property owners, the Port Authority should ask that it not have to provide options for site. The Port Authority should also seek an agreement with the site owners that splits a portion of the revenues from land sales with the Port Authority.

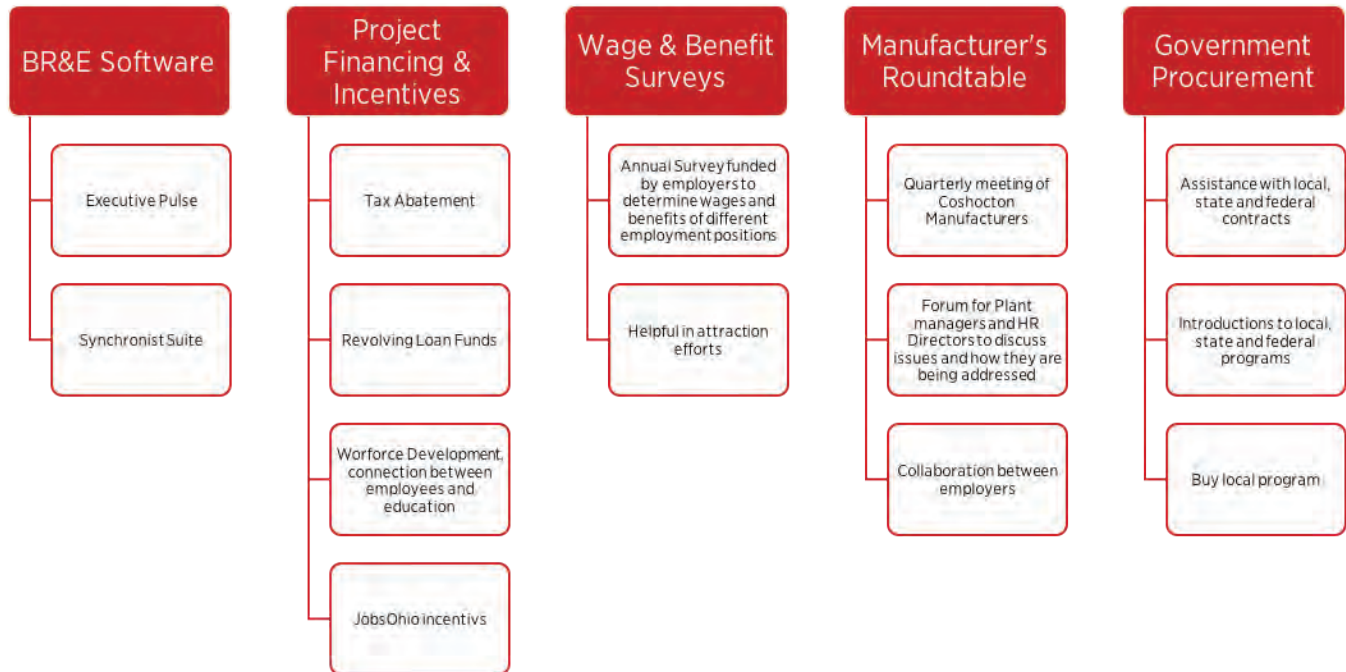
Coshocton Port Authority Strategic Plan Action Step #2 – implement an existing industry support program to provide expansion and workforce assistance by:

- Developing a list of companies to visit on an annual basis
- Investigate using a BR&E Software
- Assisting with identifying and procuring project financing, state and local incentive programs
- Providing government procurement assistance
- Conducting wage & benefit surveys
- Forming a Manufacturer's Roundtable

Keeping and helping existing industry grow is one of the fundamental building blocks of any economic development program. Since 2013 JobsOhio reported that only 21% of their development projects came from companies not currently located in Ohio; the other 79% came from existing industries that chose to expand in Ohio. The value of this statistic is that most of the growth in any community, be it a City, County, Region or State comes from industries already located in that community.

In the past year the Coshocton Port Authority has been busy meeting with existing companies to help them with workforce, regulatory, economic development incentives and addressing their concerns to helping them grow. The Port Authority has a particular focus on Existing Industry Support and will provide support through a continuum of programs.

Coshocton Port Authority Strategic Plan Action Step #3 – leverage APEG and JobsOhio to launch an attraction and marketing campaign aimed at food processing companies by:



- Redevelop the Port Authority web site to better promote the County, define the Port Authority as the economic development organization for the County.
- Attend food processing industry trade shows and events with APEG and JobsOhio
- Utilize APEG and JobsOhio vast network of food processing companies with operations and headquarters in Ohio.
- Identify and approach the top 50 food processing companies in the United States about the benefits of locating in the County.
- Internet/website and social media efforts to coordinate advertisements and direct contact campaign through social media sites such as LinkedIn, Google, Twitter, Facebook and industry trade association sites to drive traffic to the Port Authority website.
- Participating with APEG and JobsOhio in targeted trade association events such as the Industrial Asset Management Council, Site Selectors Guild and CoreNet events which are populated by national corporate site location consultants.
- Direct mail campaigns to launch a targeted direct mail campaign communicating the County's benefits to select companies in food processing.

An attraction and marketing campaign, like existing industry support, is a fundamental function of economic development organizations. Coshocton County has a concentration of manufacturing companies and in particular has a concentration of food processing facilities with Kraft Foods. Based on interviews with JobsOhio, construction industry professionals and site selection consultants, attraction efforts should be focused on food processing companies.

Information from organizations involved in the Food Processing industry was used to develop site development program and infrastructure use profile for a typical project.

- 200,000SF Building
- 400 Parking Spaces (accommodates two shifts of 200 employees per shift)
- Service area 135ft from the face of the building for Shipping/Receiving/External Storage/Equipment external to the building. 135ft is sufficient to accommodate full size semi-truck access.
- Fire access lane around the entire building
- 50,000gpd water usage
- 50,000gpd waste water
- 4 Megawatts of electricity
- Site planning setbacks – 25ft pavement, 50ft building
- Limited need for high speed fiber
- 12-15 acres of land

A prototypical site layout is included in Appendix “D”.

Coshocton Port Authority Strategic Plan Action Step #4 – engage wood manufacturers in the County and in neighboring counties to understand their transportation needs to help them grow by:

- Setting up one-on-one meetings with wood manufacturers in Coshocton County.
- Meeting with economic development officials in Holmes County to understand how they have addressed the needs of wood manufacturers.
- Developing a Coshocton Wood Manufacturer Council to allow for an exchange of ideas between the companies.
- Identifying buildings in Coshocton that would allow wood manufacturers to expand and grow operations.
- Working with the County Engineer to identify the most heavily traveled transportation routes and determining what steps are needed to improve those routes.

Along with its own initiatives, the Coshocton County Port Authority should become actively engaged and involved with APEG's Forest to Furniture initiative. This initiative provides support to the industry through the Small Business Administration (SBA) for loans and business planning as well as meetings and forums with companies to discuss their needs and concerns. Appendix "F" includes a listing and map of existing Forestry Industry businesses located in Coshocton County.

Coshocton Port Authority Strategic Plan Action Step #5 - work with its education partners to establish an occupational marketing campaign to provide a pipeline of manufacturing workers by:

- Identifying workforce and industry partners to develop a skills gap/human resources committee to specifically monitor, address and provide programming for the community's existing skills gap.
- Promoting manufacturing and transportation jobs amongst middle and high-school guidance counselors, teachers and students as well as with those seeking work in the region.
- Create and distribute a workforce survey to area manufacturers to identify the specific occupations where a skills gap exists.
- Coordinate with existing industry, various school districts, and Central Ohio Technical College to develop internships and apprenticeships programming.
- Bus tours of manufacturers in Coshocton County for students, parents, teachers and guidance counselors.
- Raising funds from area companies, local governments and the state of Ohio to create a pool of funding that students can use for scholarships at Coshocton County educational institutions and apprenticeships at local businesses.
- General education and marketing of students, parents, teachers, and guidance counselors through social media, traditional media, and outreach in the schools.

Based upon interviews with Coshocton County employers, there is a dramatic concern about the lack of skilled workers particularly in the manufacturing industry. Much of the discussion during one on one and focus group discussions with employers and economic development leaders in Coshocton County focused on the concern with engaging young workers in the trucking and manufacturing process. Based upon actual open job data and employer input, it is clear Coshocton County does in fact face a skilled workforce shortage. The key to getting parents, teachers and guidance counselors to again direct students into manufacturing is through a targeted education and marketing campaign. Employers across the board, in focus group and one-on-one interviews have expressed an interest in getting more students in the workplace to address the skills gap. The occupational marketing campaign allows for business and

industry to come together with education and government to make sure that high-wage jobs are no longer going unfilled in Coshocton County.

*Coshocton Port Authority Strategic Plan Action Step #6 -
launch a fundraising campaign to attract additional public
and private sector dollars to the organization by:*

- Establishing a fundraising committee within the Board of Directors
- Developing a fundraising goal that is realistic and can be applied to the economic development efforts of the Coshocton Port Authority.
- Using the Coshocton Port Authority Business/Industrial Park Strategic Plan as a basis to approach existing and new investors to take ownership of the Action Plan and become stewards in its success through 2025.
- Expand the Fundraising Committee to include outside local business and community leaders with influence in economic development.
- Setting up focus groups and one-on-one interviews with new and prospective investors to gauge their level of interest in investing in Coshocton Port Authority.

Successful economic development organizations in Ohio and across the country are able to meet job retention, job creation, capital investment, and income levels through a combination of financial and voluntary support from the public and private sectors. Progressive communities acquire wealth by utilizing all available resources of a market including fiscal, natural, human, private, governmental and all others to enhance the economic security and quality of life of its residents.

There are two primary goals of an economic development action plan and program:

- Increase the flow of money into a community
- Retard the flow of money out of a community

By accomplishing these two goals, the entire economy of an area is enhanced as the total wealth in the community increases, benefiting all citizens.

The Coshocton Port Authority must look for additional resources to enhance its efforts in:

- Existing Industry Support Program
- Attraction & Marketing Program
- Site Development Program
- Occupational Marketing Campaign

Communities in Ohio that Coshocton County competes with daily for expansion and attraction projects are dedicating considerable public and private resources to their economic development efforts.

Organization	Annual Budget	Staff	Population
Circleville-Pickaway CIC	\$390,000.00	2	57,565
Henry County CIC	\$175,000.00	2	27,629
Southern Ohio Port Authority, Scioto County	\$305,609	2	76,825
Clinton County Port Authority	\$254,000	2	41,917
EDFA of Tuscarawas	\$1,709,000.00	4	92,420
Monroe County Port Authority	\$127,000	1	14,409
Zanesville-Muskingum County Port Authority	\$215,533	2	86,290

Coshocton County has numerous economic development opportunities ahead of it, the Port Authority needs additional funding and staffing to achieve economic development success and implement the recommendations in this plan.

APPENDIX

APPENDIX A: EXISTING SITE CONDITIONS



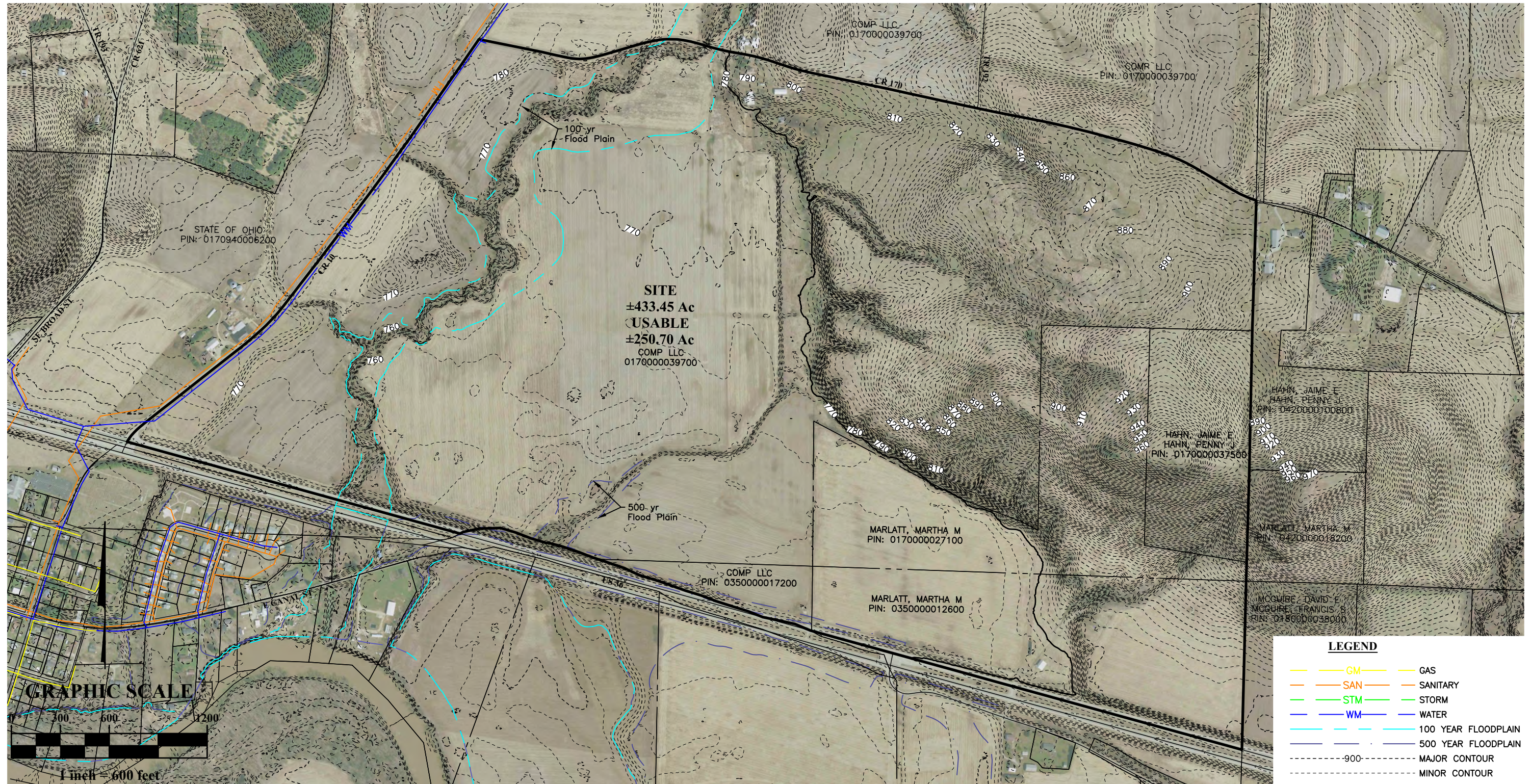
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CITY OF COSHOCTON, COSHOCTON COUNTY, OHIO
EXISTING CONDITIONS EXHIBIT
FOR
GREEN FIELD SITE #1

DATE: April 13, 2018

SCALE: 1" = 600'

JOB NO.: 20171421



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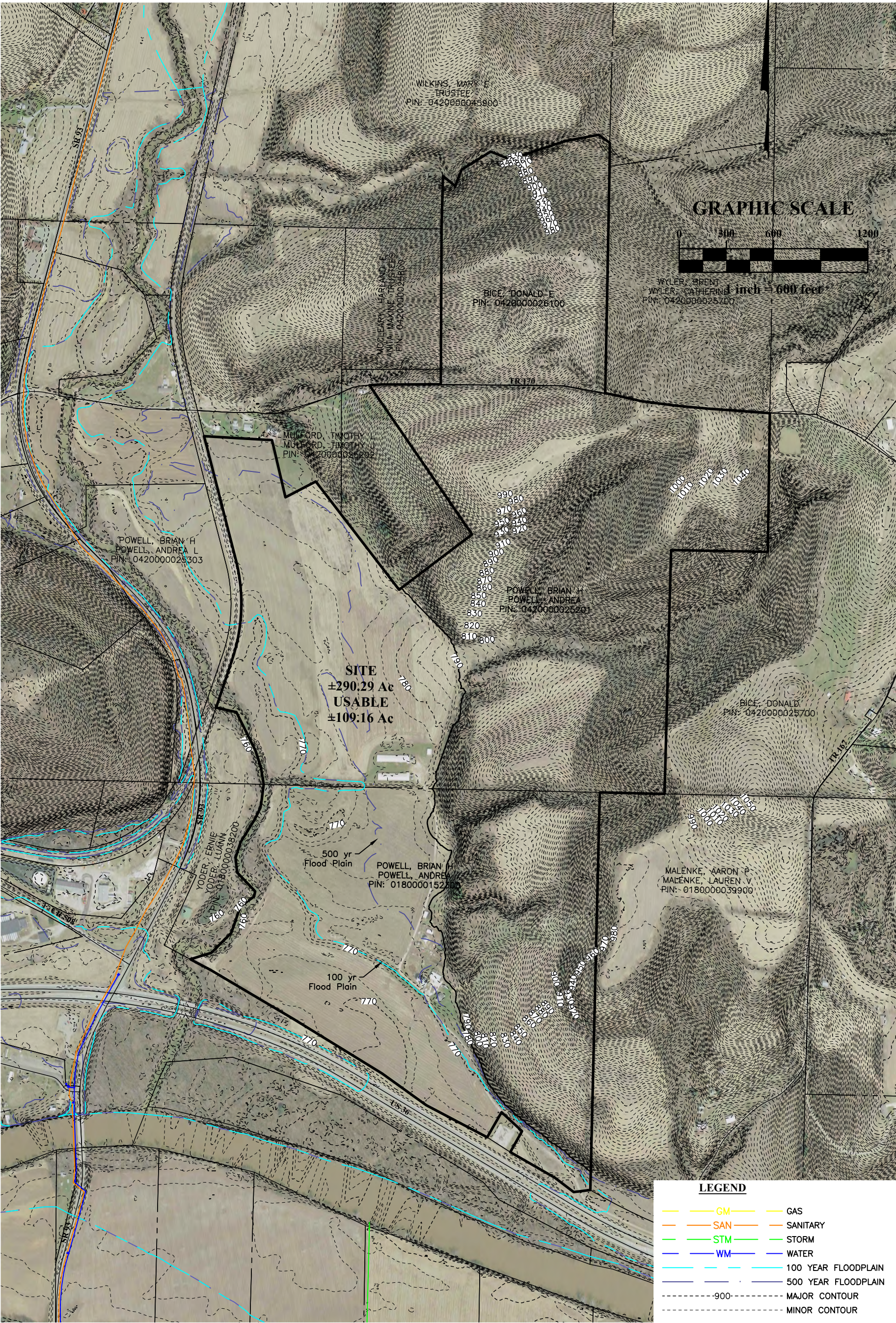
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CITY OF COSHOCTON, COSHOCTON COUNTY, OHIO
EXISTING CONDITIONS EXHIBIT
FOR
GREEN FIELD SITE #2

DATE: April 13, 2018

SCALE: 1" = 600"

JOB NO.: 20171421







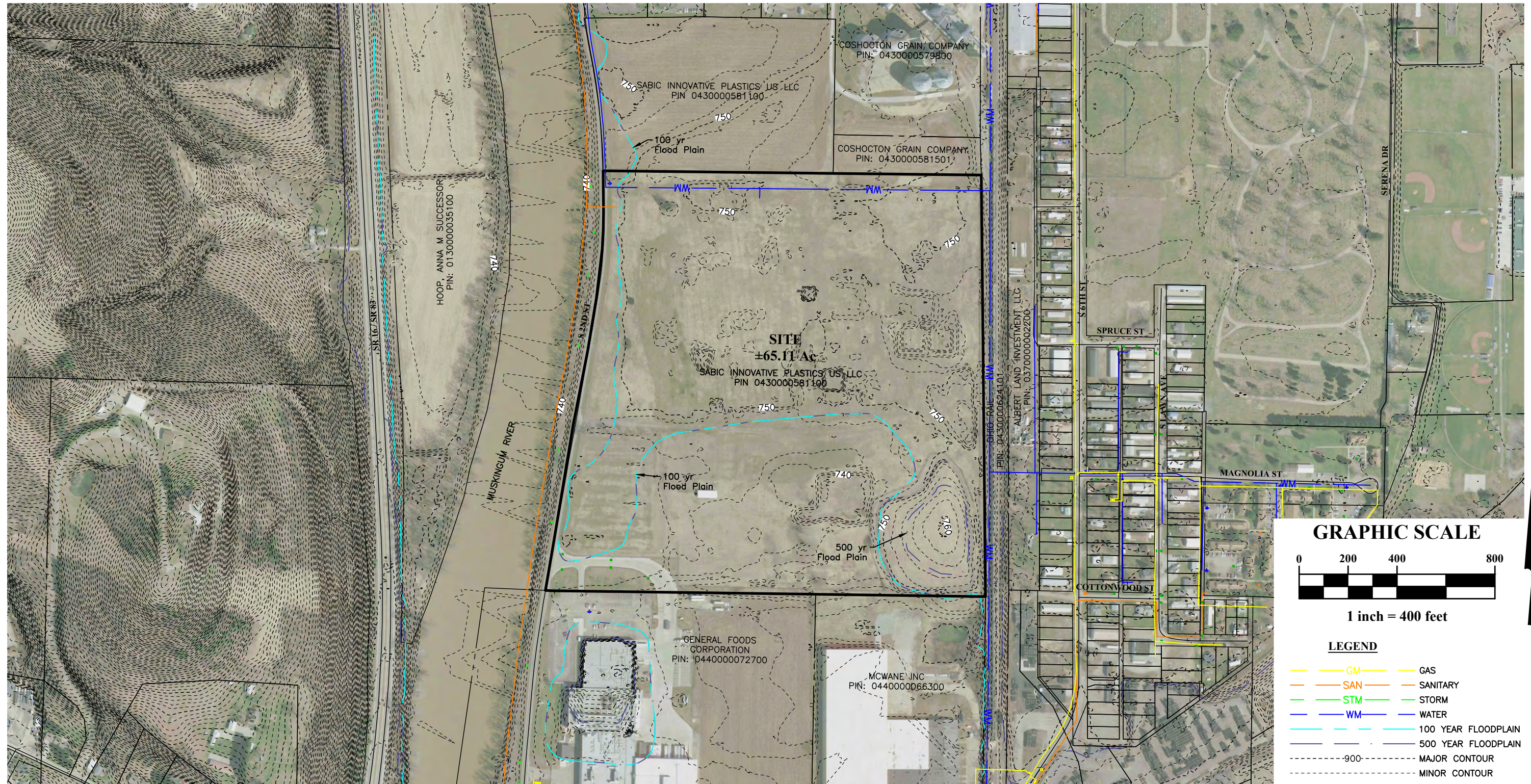
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CITY OF COSHOCTON, COSHOCTON COUNTY, OHIO
EXISTING CONDITIONS EXHIBIT
FOR
FORMER GE SITE (SABIC)

DATE: April 13, 2018

SCALE: 1" = 400'

JOB NO.: 20171421





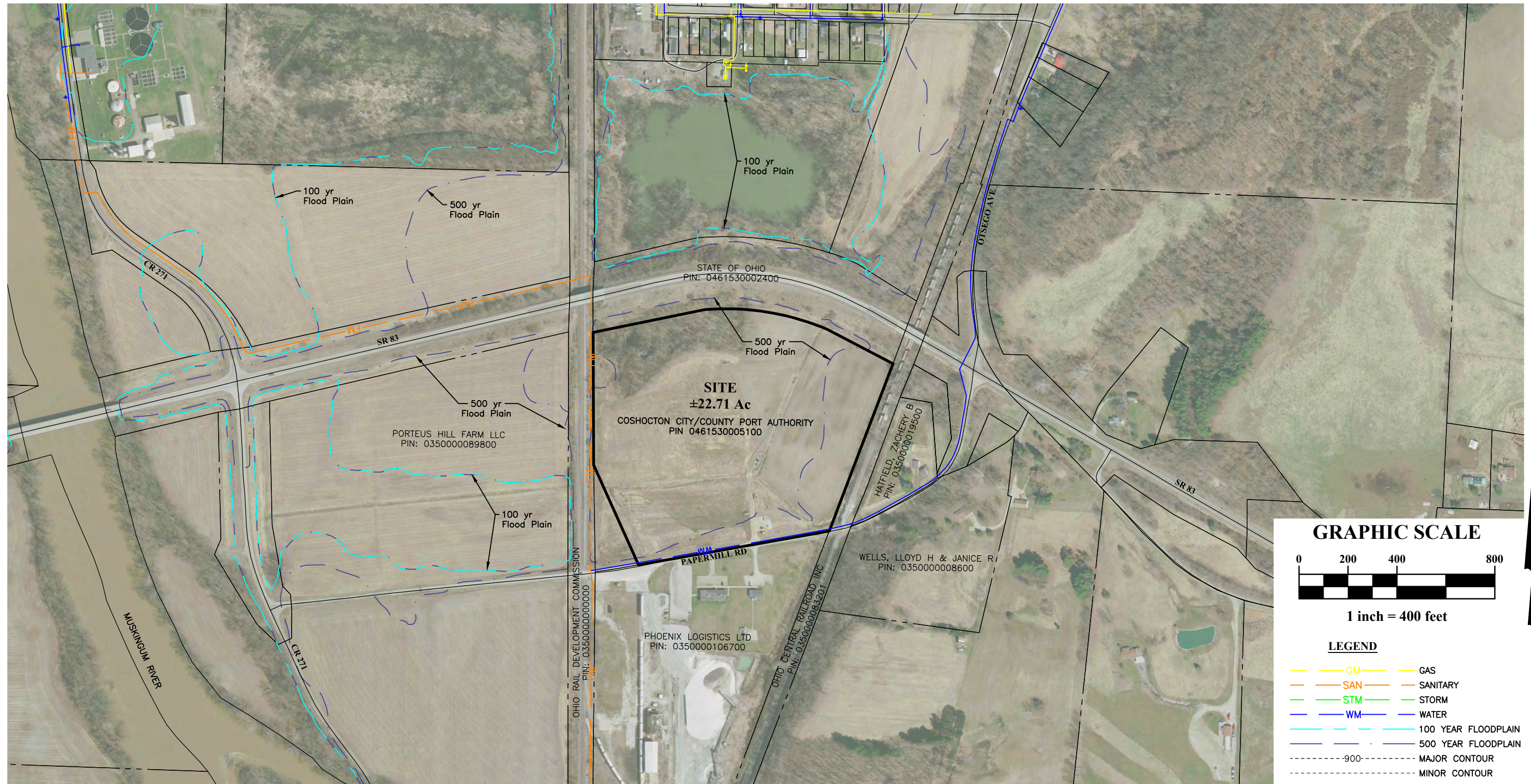
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CITY OF COSHOCTON, COSHOCTON COUNTY, OHIO
EXISTING CONDITIONS EXHIBIT
FOR
PAPERMILL ROAD

DATE: April 13, 2018

SCALE: 1" = 400'

JOB NO.: 20171421



APPENDIX B: NWI MAPPING



U.S. Fish and Wildlife Service

National Wetlands Inventory

Greenfield Site #1



March 27, 2018

Wetlands

	Estuarine and Marine Deepwater		Freshwater Emergent Wetland		Lake
	Estuarine and Marine Wetland		Freshwater Forested/Shrub Wetland		Other
			Freshwater Pond		Riverine

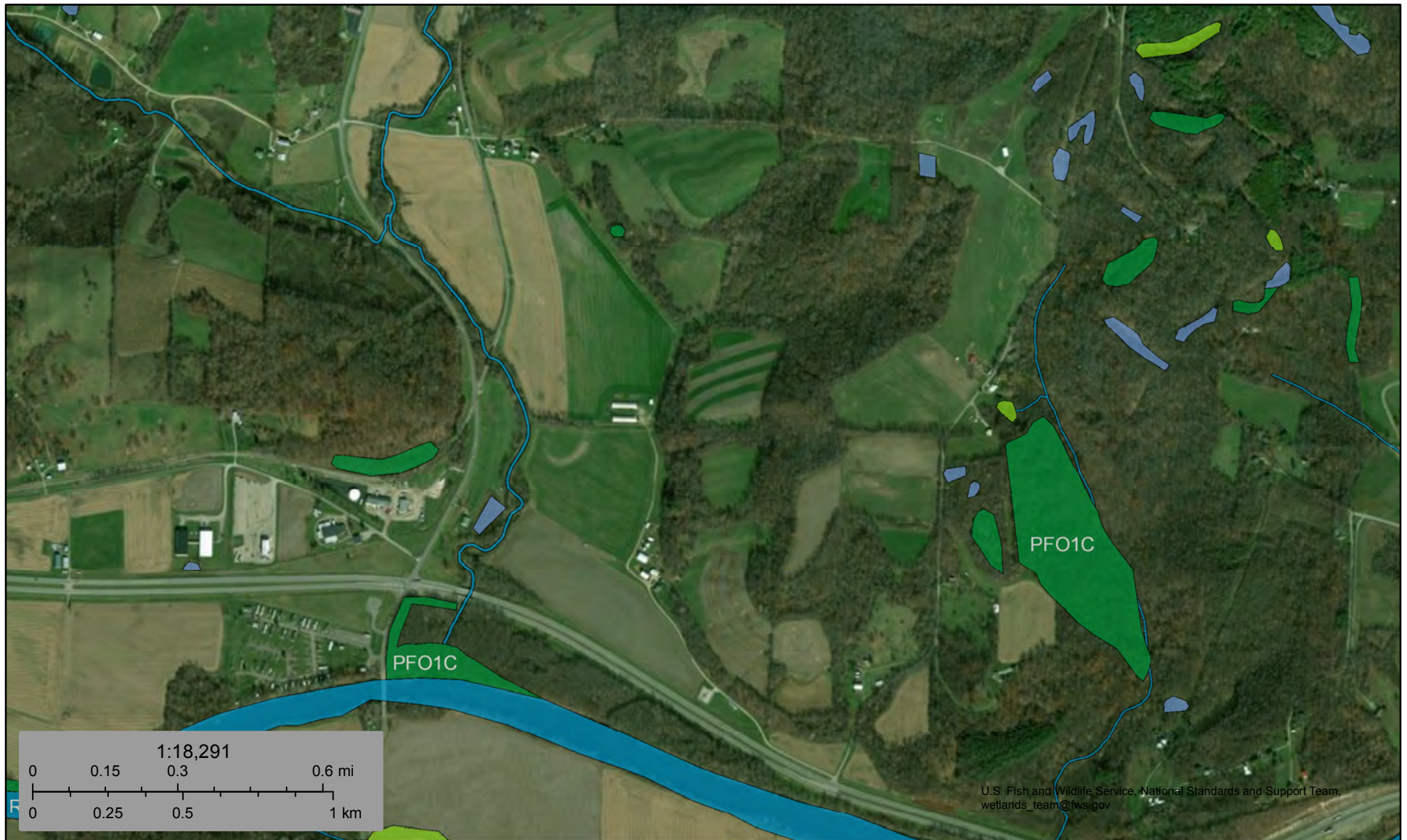
This map is for general reference only. The US Fish and Wildlife Service is not responsible for the accuracy or currentness of the base data shown on this map. All wetlands related data should be used in accordance with the layer metadata found on the Wetlands Mapper web site.



U.S. Fish and Wildlife Service

National Wetlands Inventory

Greenfield #2



March 27, 2018

Wetlands

- Estuarine and Marine Deepwater
- Estuarine and Marine Wetland

- Freshwater Emergent Wetland
- Freshwater Forested/Shrub Wetland
- Freshwater Pond

- Lake
- Other
- Riverine

This map is for general reference only. The US Fish and Wildlife Service is not responsible for the accuracy or currentness of the base data shown on this map. All wetlands related data should be used in accordance with the layer metadata found on the Wetlands Mapper web site.

APPENDIX C : OFF-SITE INFRASTRUCTURE IMPROVEMENTS



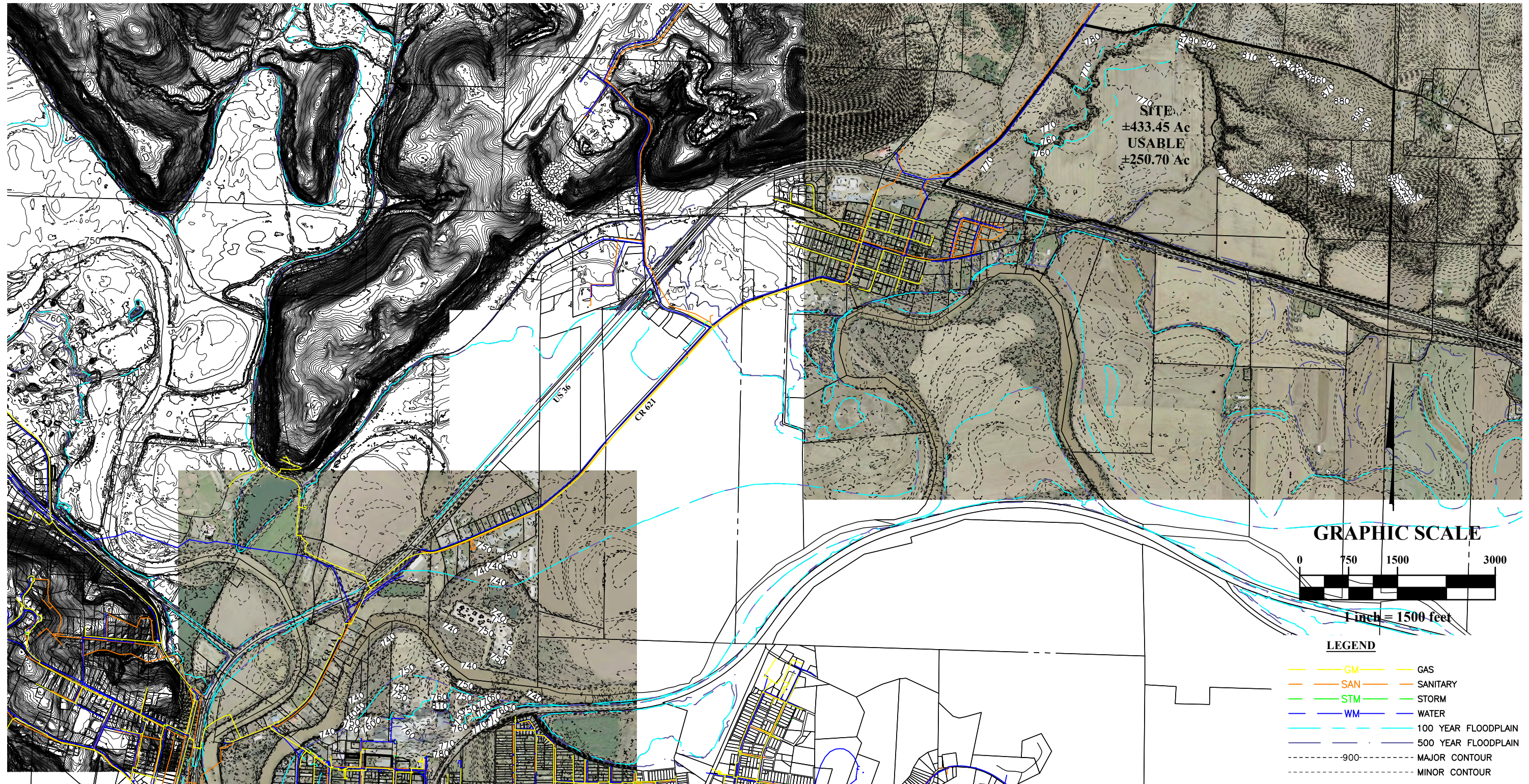
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CITY OF COSHOCTON, COSHOCTON COUNTY, OHIO
OFF-SITE INFRASTRUCTURE IMPROVEMENTS EXHIBIT
FOR
GREEN FIELD SITE #1

DATE: April 13, 2018

SCALE: 1" = 1500'

JOB NO.: 20171421



EMH&T

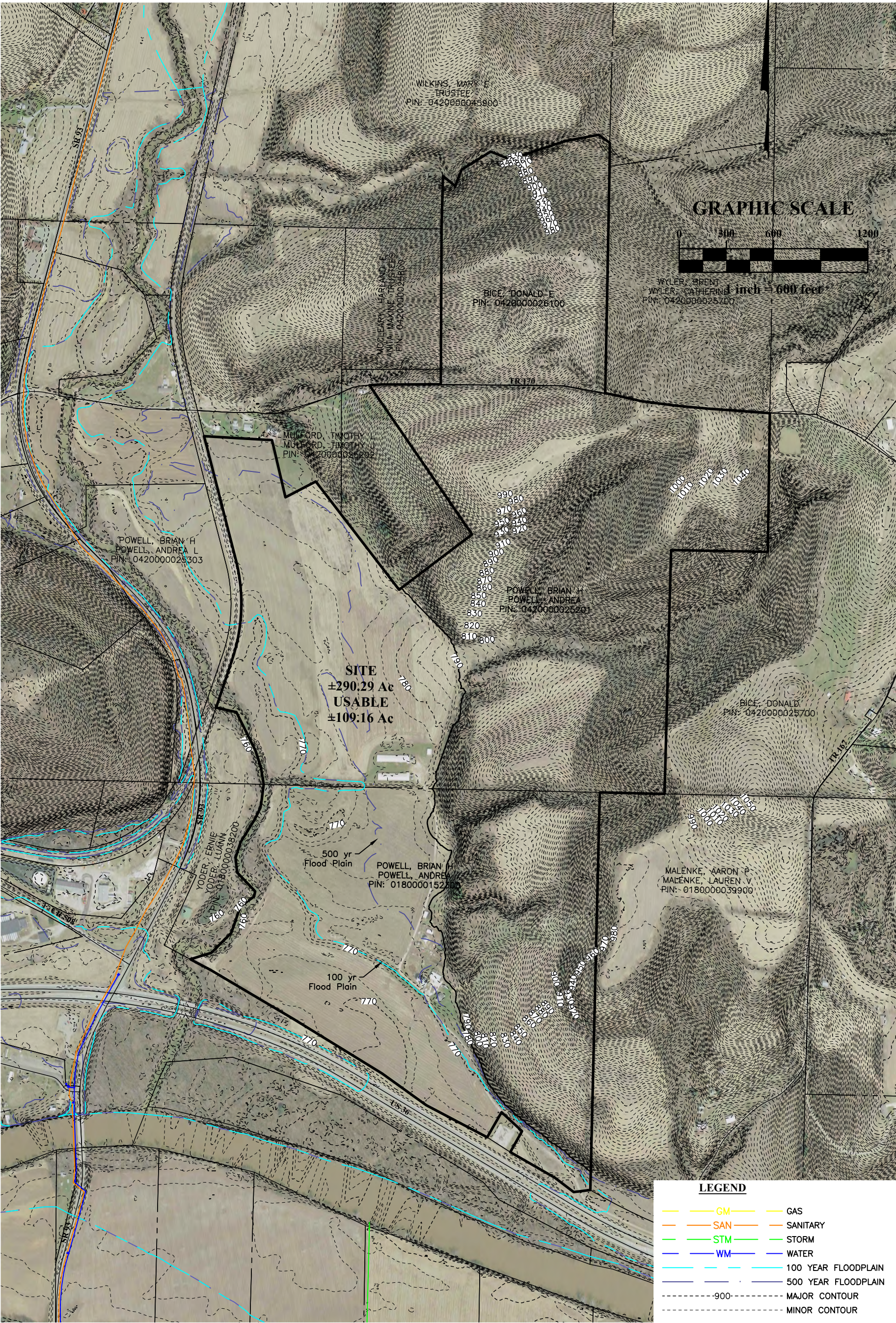
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CITY OF COSHOCTON, COSHOCTON COUNTY, OHIO
OFF-SITE INFRASTRUCTURE
IMPROVEMENTS EXHIBIT
FOR
GREEN FIELD SITE #2

DATE: April 13, 2018

SCALE: 1" = 600"

JOB NO.: 20171421



CITY OF COSHOCTON, COSHOCTON COUNTY, OHIO
OFF-SITE INFRASTRUCTURE IMPROVEMENTS
EXISTING CONDITIONS EXHIBIT
FOR
SHELLY MATERIALS INC

DATE: April 13, 2018

SCALE: 1" = 600"

JOB NO.: 20171421





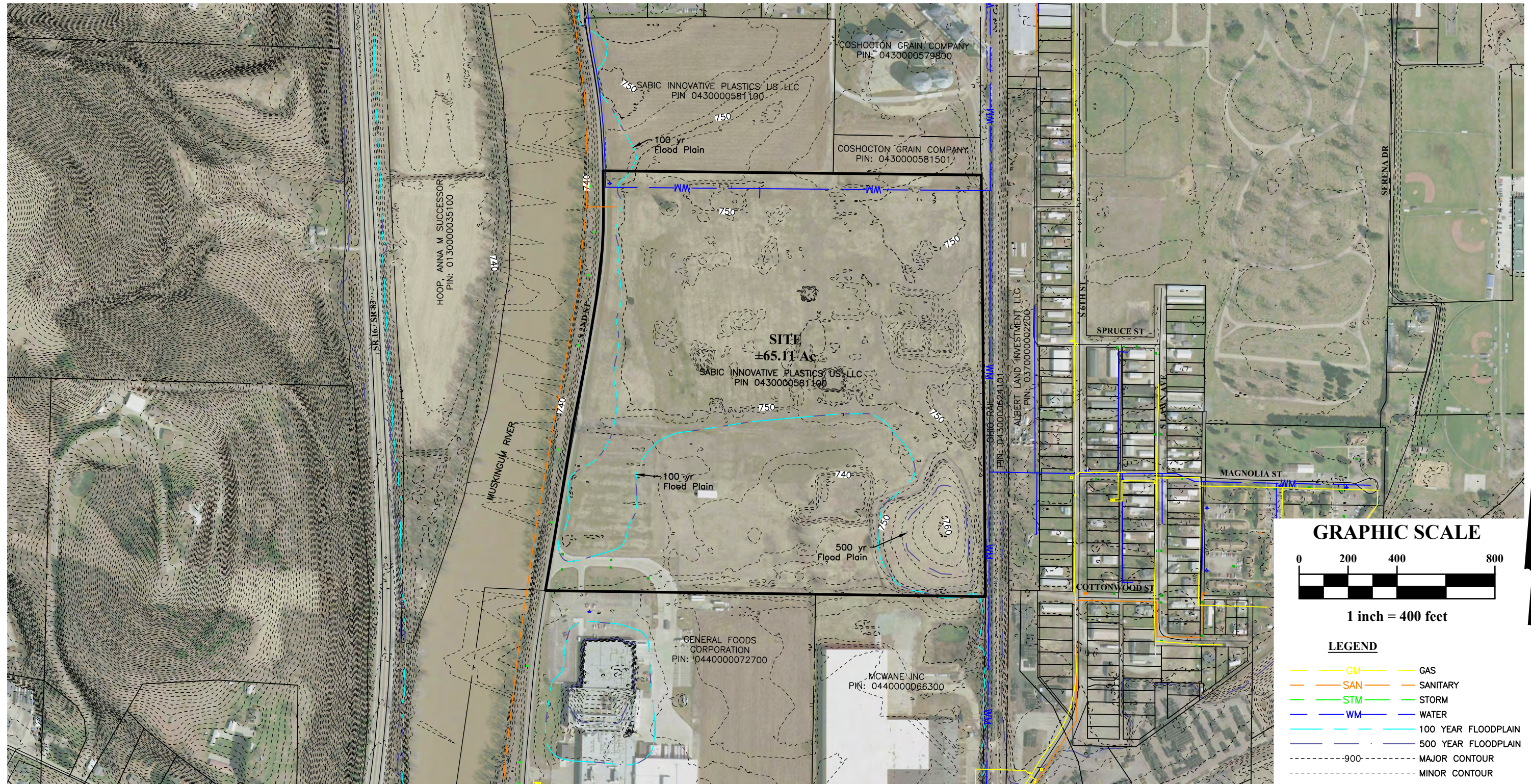
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OFF-SITE INFRASTRUCTURE IMPROVEMENTS EXHIBIT
FOR
FORMER GE SITE (SABIC)

DATE: April 13, 2018

SCALE: 1" = 400'

JOB NO.: 20171421





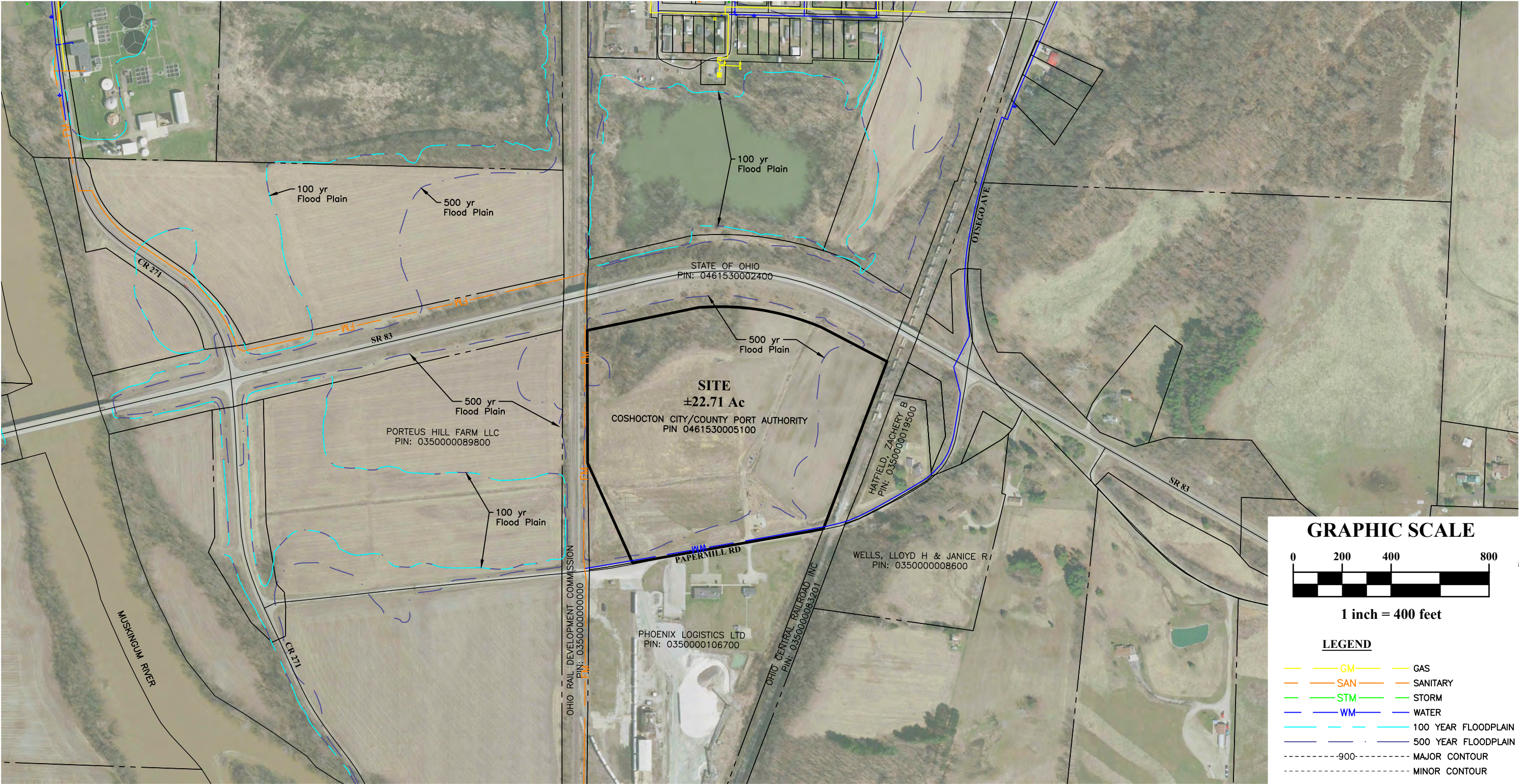
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CITY OF COSHOCTON, COSHOCTON COUNTY, OHIO
OFF-SITE INFRASTRUCTURE IMPROVEMENTS EXHIBIT
FOR
PAPER MILL SITE

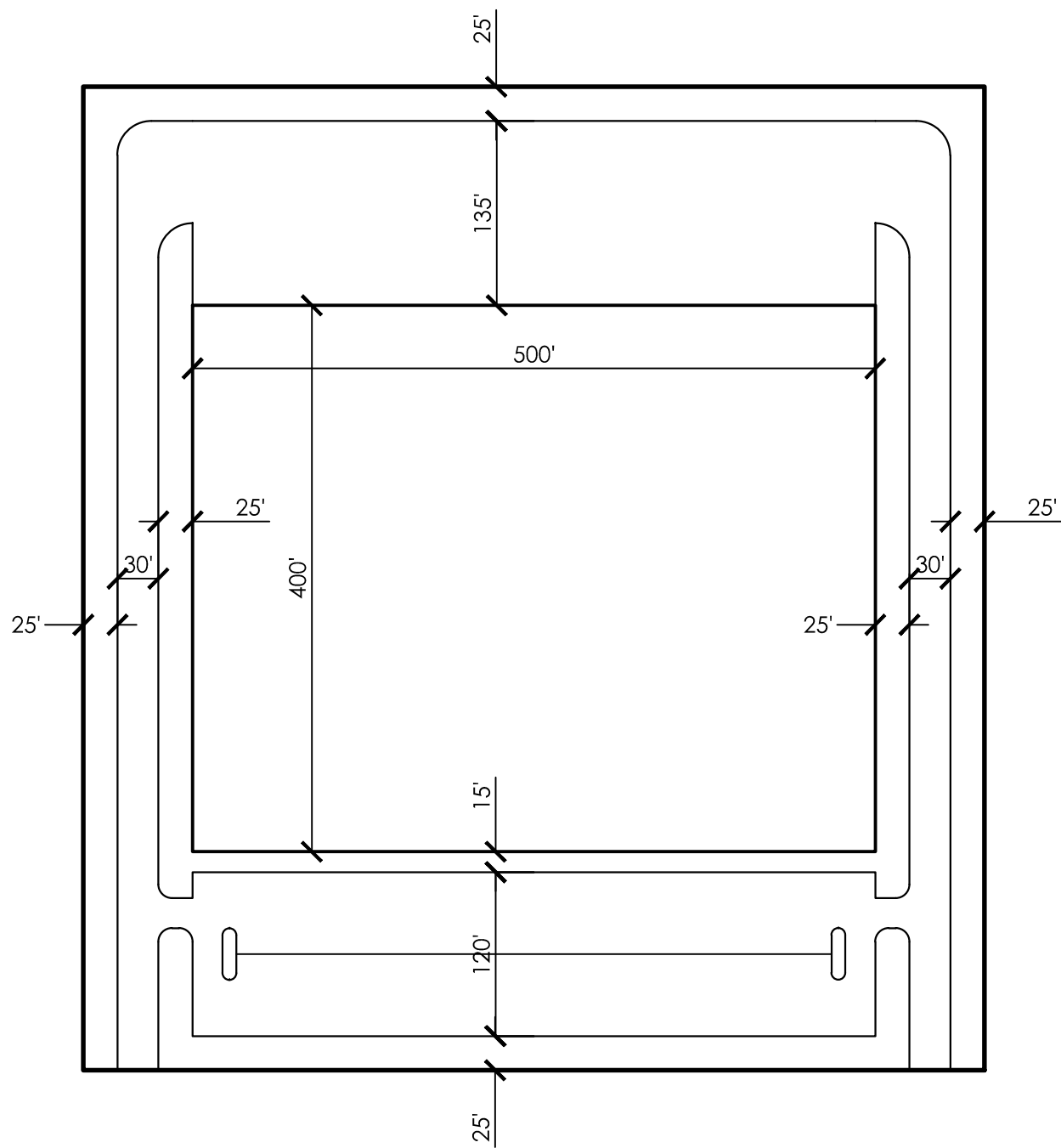
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SCALE: 1" = 400'

JOB NO.: 20171421



APPENDIX D: CONCEPTUAL DEVELOPMENT PLANS





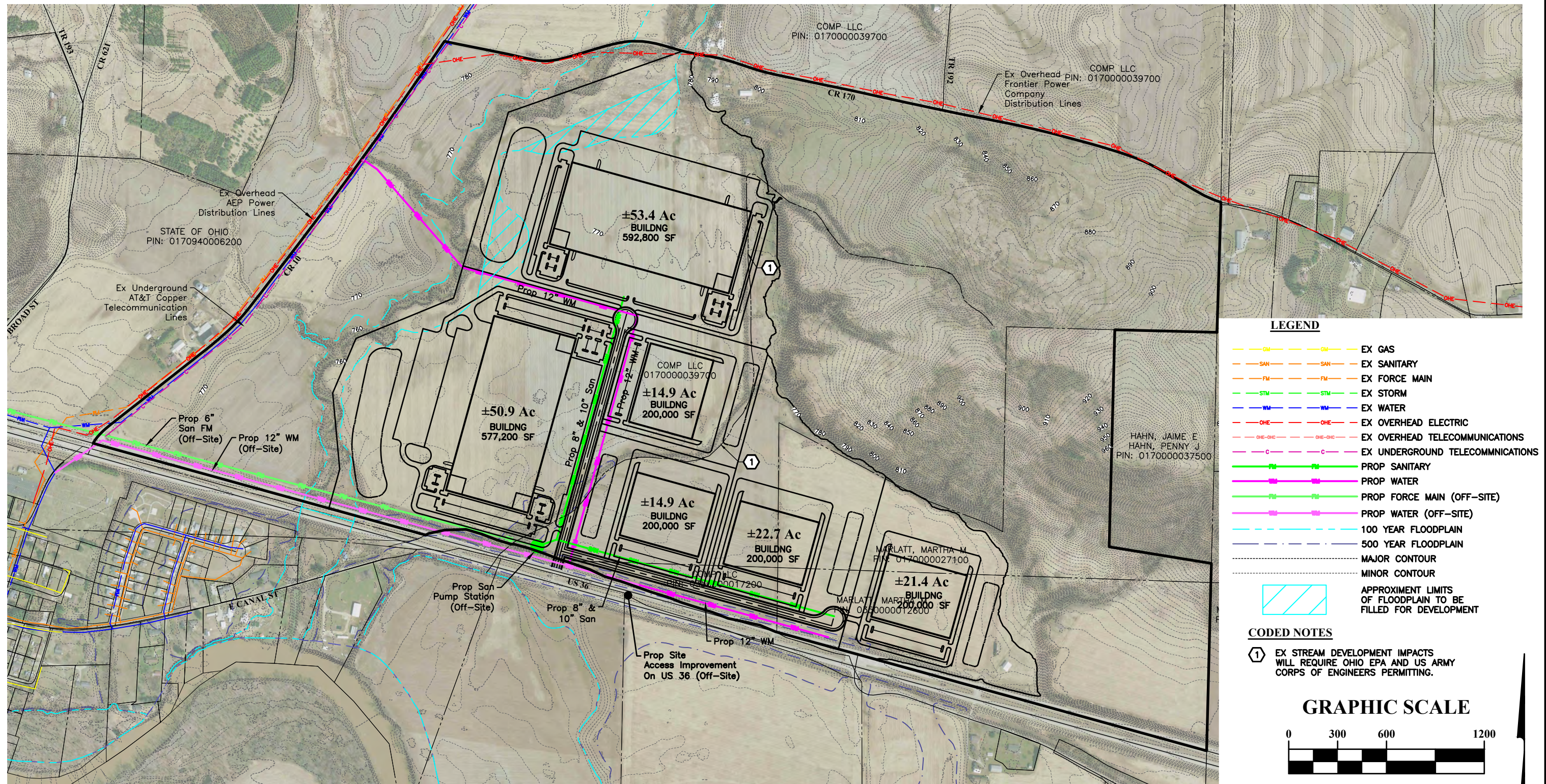
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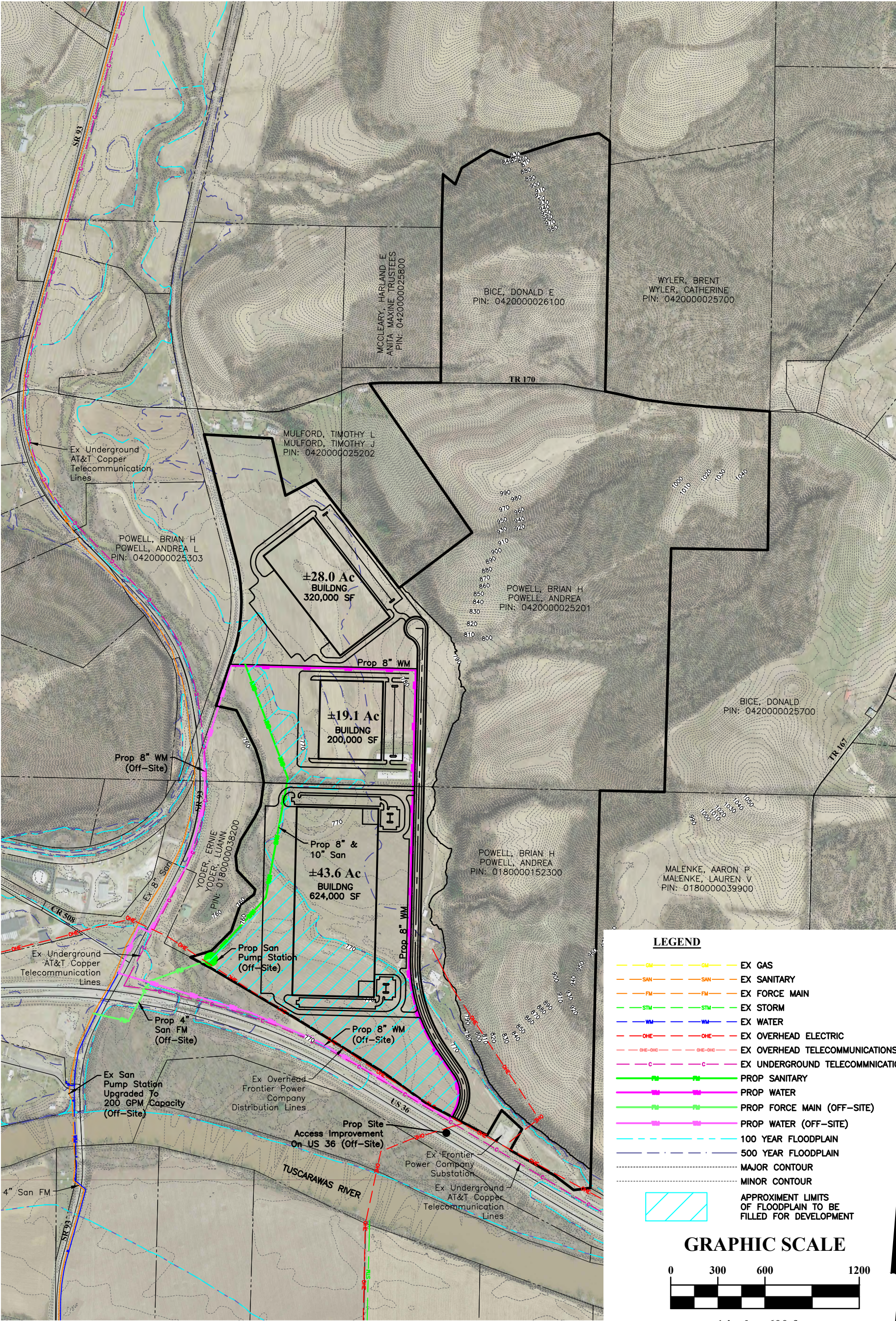
CITY OF COSHOCTON, COSHOCTON COUNTY, OHIO
CONCEPTUAL DEVELOPMENT PLANS
FOR
GREEN FIELD SITE #1

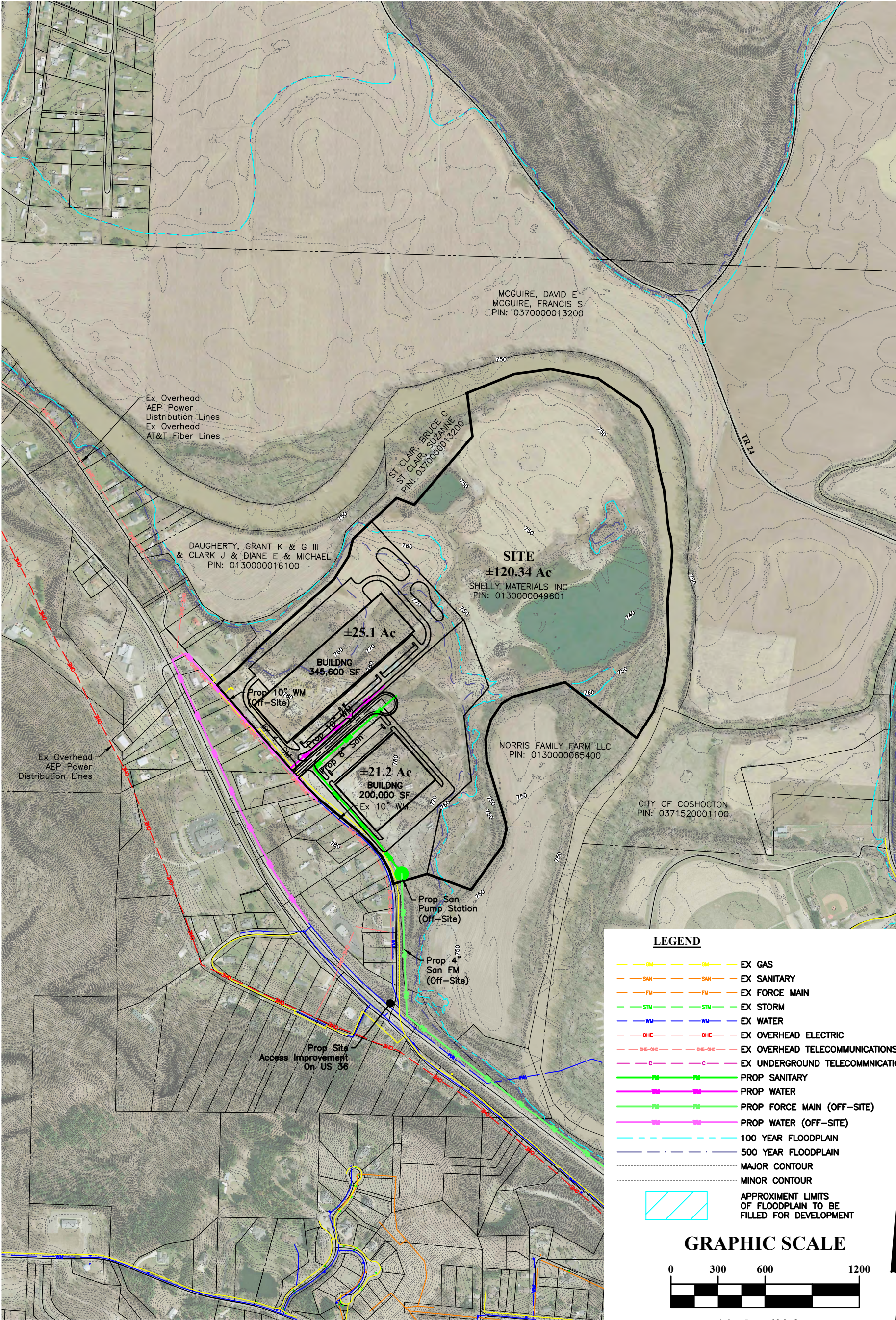
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SCALE: 1" = 600'

JOB NO.: 20171421









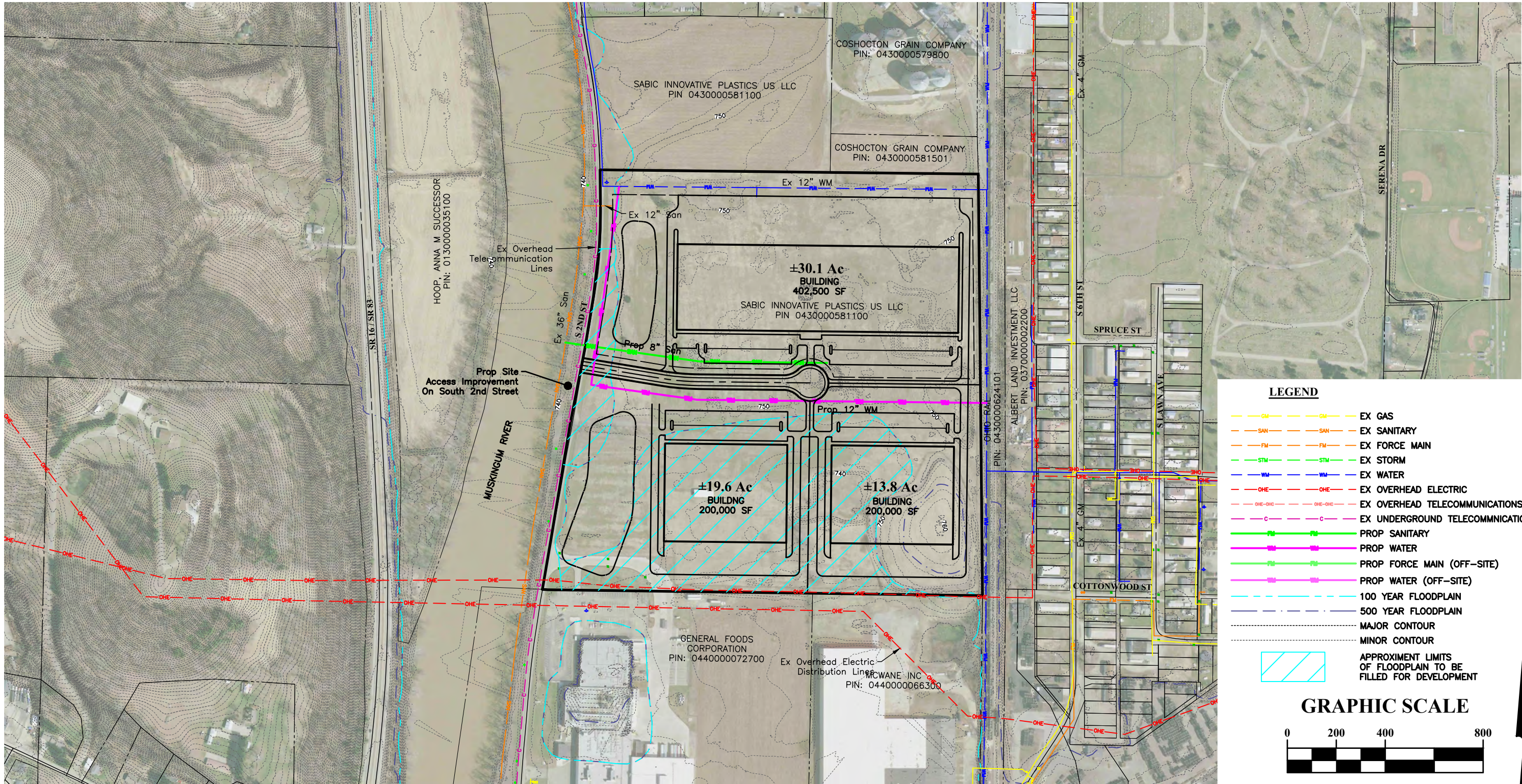
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CITY OF COSHOCTON, COSHOCTON COUNTY, OHIO
CONCEPTUAL DEVELOPMENT PLANS
FOR
FORMER GE SITE (SABIC)

DATE: May 7, 2018

SCALE: 1" = 400'

JOB NO.: 20171421





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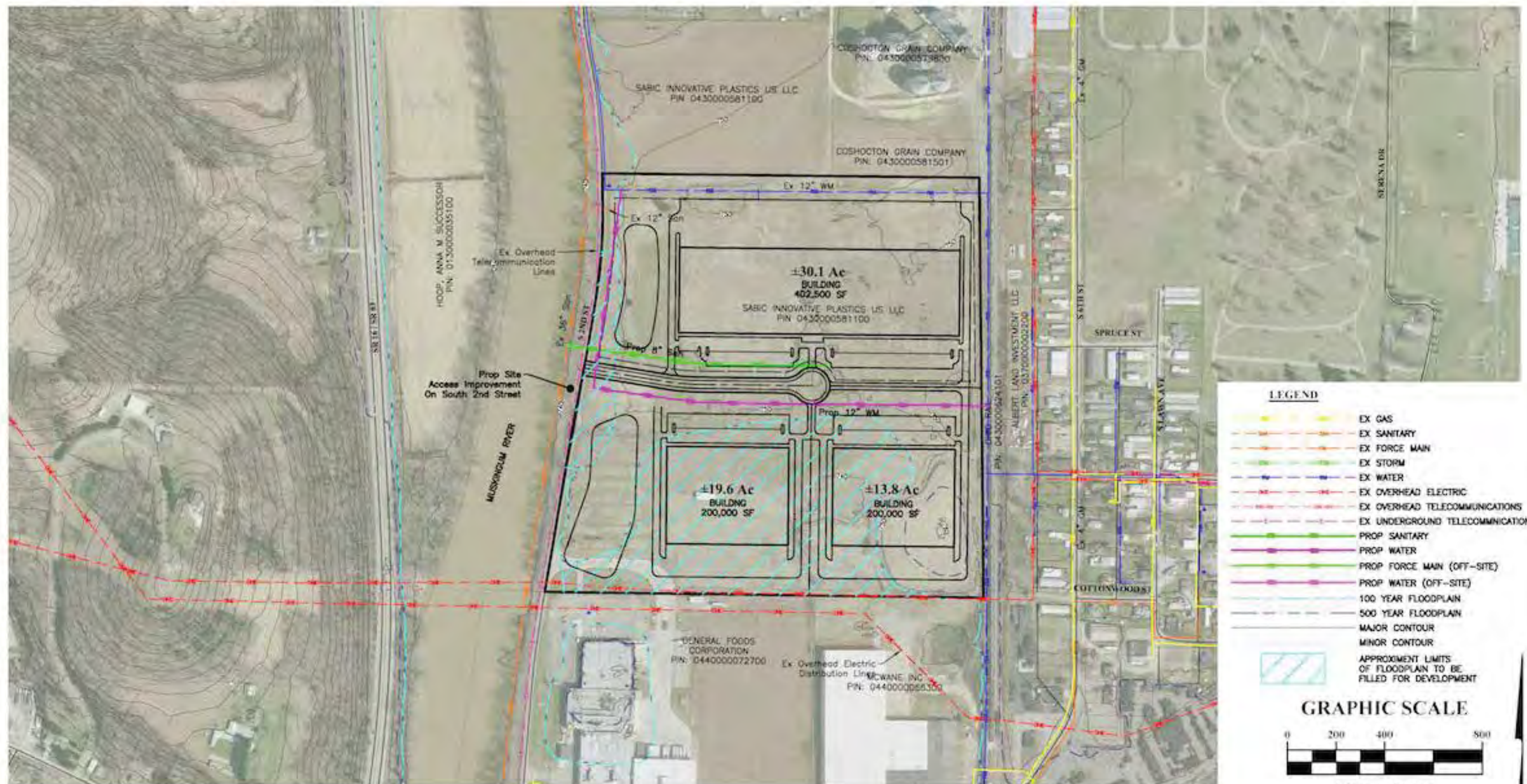
emht.com

CITY OF COSHOCTON, COSHOCTON COUNTY, OHIO
CONCEPTUAL DEVELOPMENT PLANS
FOR
FORMER GE SITE (SABIC)

DATE: May 7, 2018

SCALE: 1" = 400'

JOB NO.: 20171421





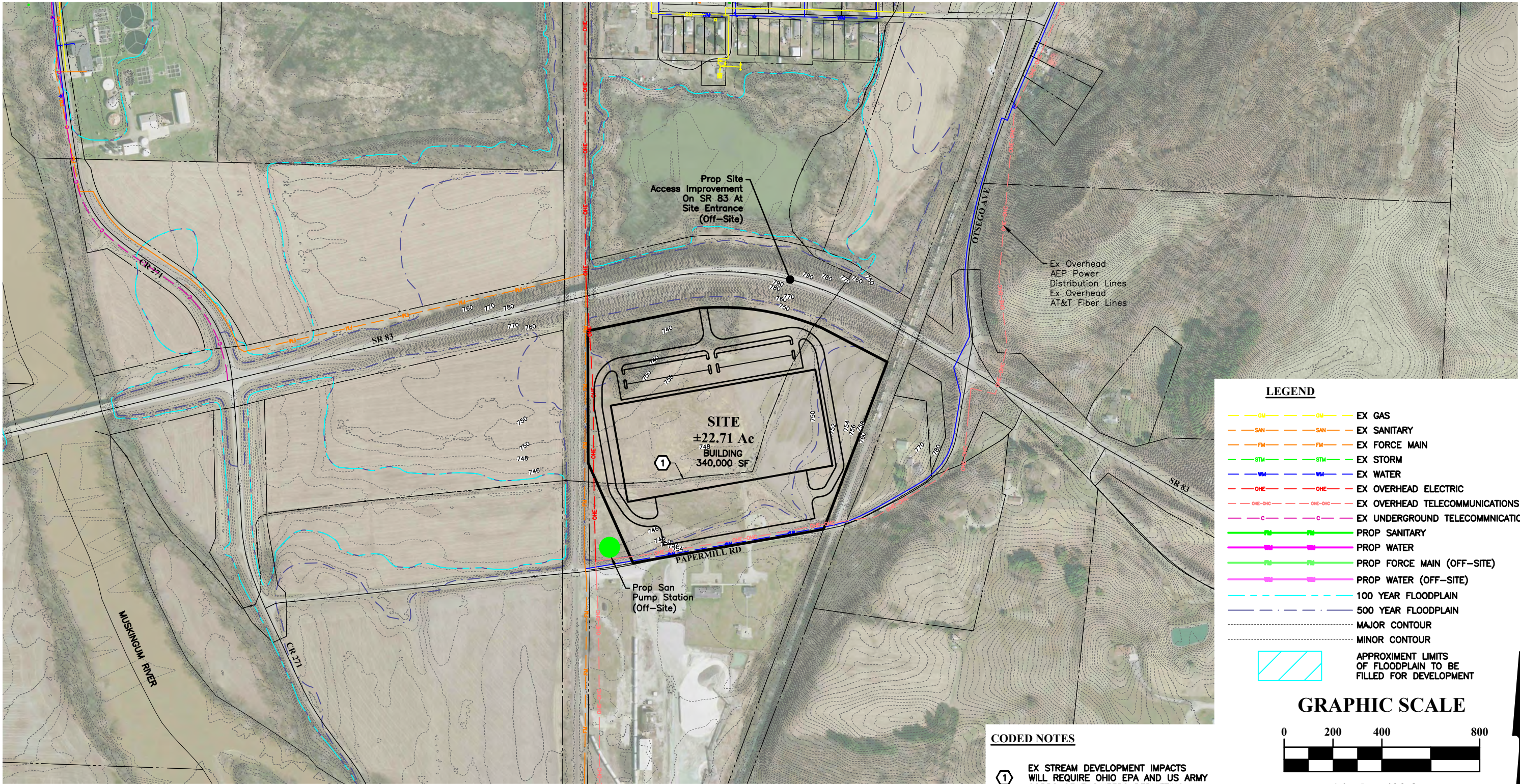
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CITY OF COSHOCTON, COSHOCTON COUNTY, OHIO
OFF-SITE INFRASTRUCTURE IMPROVEMENTS EXHIBIT
FOR
PAPERMILL ROAD

DATE: May 7, 2018

SCALE: 1" = 400'

JOB NO.: 20171421





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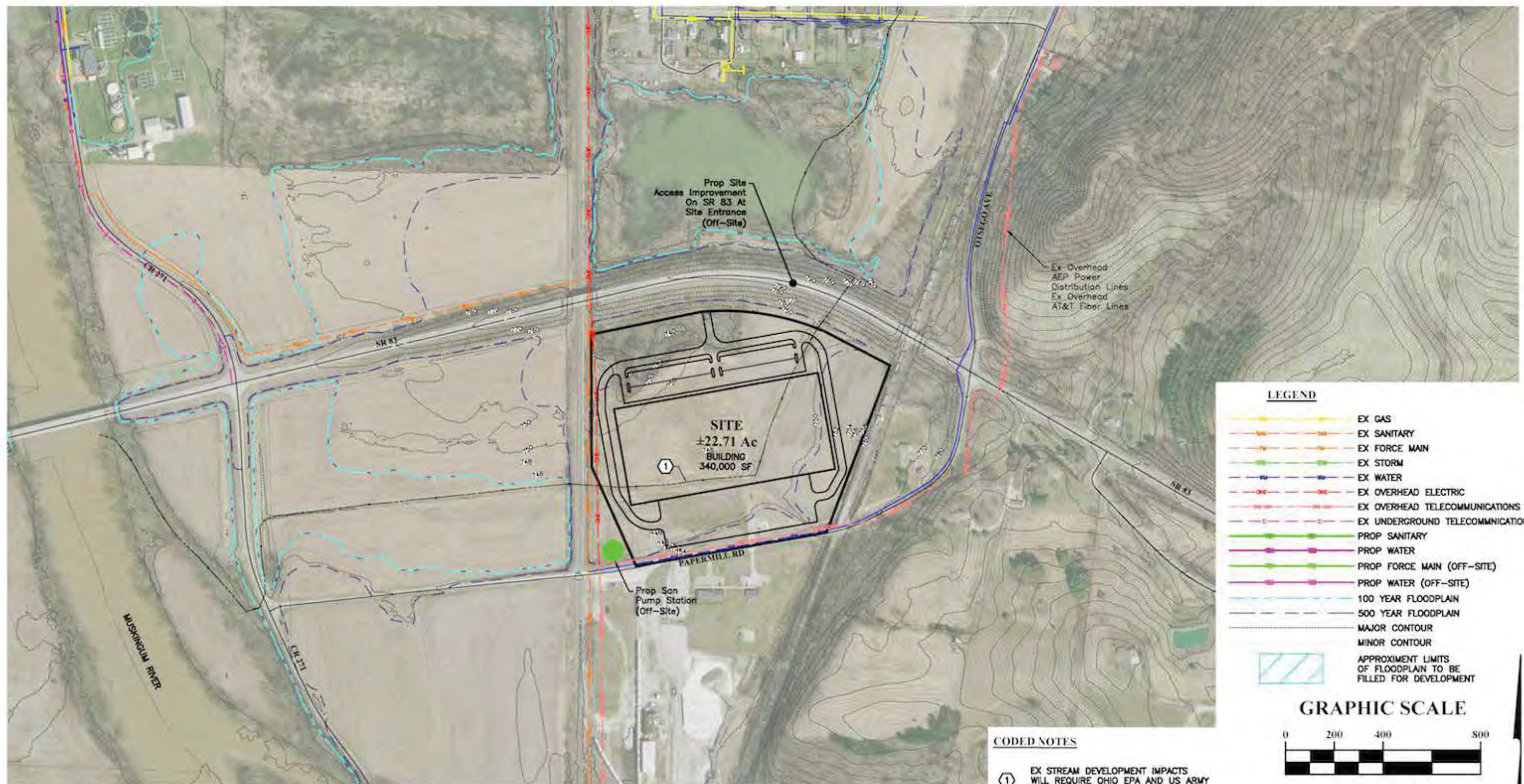
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CITY OF COSHOCTON, COSHOCTON COUNTY, OHIO
OFF-SITE INFRASTRUCTURE IMPROVEMENTS EXHIBIT
FOR
PAPERMILL ROAD

DATE: May 7, 2018

SCALE: 1" = 400'

JOB NO.: 20171421



LEGEND

- EX GAS
- EX SANITARY
- EX FORCE MAIN
- EX STORM
- EX WATER
- EX OVERHEAD ELECTRIC
- EX OVERHEAD TELECOMMUNICATIONS
- EX UNDERGROUND TELECOMMUNICATIONS
- PROP SANITARY
- PROP WATER
- PROP FORCE MAIN (OFF-SITE)
- PROP WATER (OFF-SITE)
- 100 YEAR FLOODPLAIN
- 500 YEAR FLOODPLAIN
- MAJOR CONTOUR
- MINOR CONTOUR
- APPROXIMATE LIMITS OF FLOODPLAIN TO BE FILLED FOR DEVELOPMENT

GRAPHIC SCALE



1 inch = 400 feet

CODED NOTES

- ① EX STREAM DEVELOPMENT IMPACTS WILL REQUIRE OHIO EPA AND US ARMY CORPS OF ENGINEERS PERMITTING.

APPENDIX E: AIRPORT EXISTING CONDITIONS

EMH&T

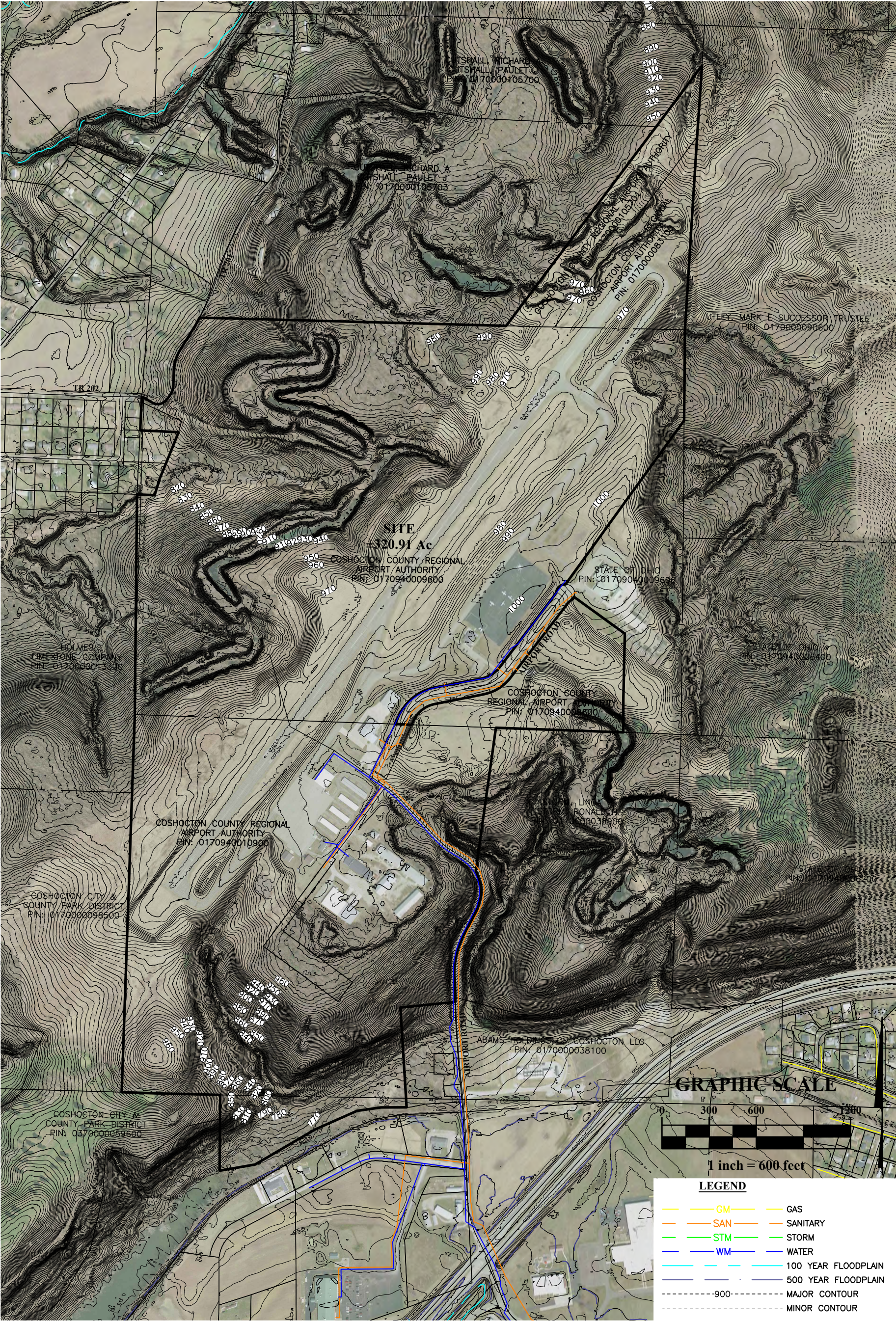
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CITY OF COSHOCTON, COSHOCTON COUNTY, OHIO
EXISTING CONDITIONS EXHIBIT
FOR
COSHOCTON COUNTY
REGIONAL AIRPORT
AUTHORITY

DATE: April 13, 2018

SCALE: 1" = 600"

JOB NO.: 20171421



APPENDIX F: LOCATIONS OF EXISTING FORESTRY PRODUCT BUSINESSES

Appendix "F"

Existing Forestry Product Businesses

Company Name	Address	Main Industry Sector
A & A Woodcraft	33462 Township Road 235, Fresno, OH 43824	Furniture
A & B Wood Products	31903 Township Road 236, Fresno, OH 43824	Furniture
Blackberry Hill Woodcraft, LLC	46410 County Road 405, Coshocton, OH 43812	Furniture
Chili Logging, LTD	30240 Country Raod 10, Fresno, OH 43824	Logging
Coshocton Lumber Co	1200 Walnut St, Coshocton, OH 43812	Furniture
Country Cedar Box Company	30908 Township Road 89, Fresno, OH 43824	Furniture
Deer Valley Woodworking	32441 County Road 12, Fresno, OH 43824	Furniture
Firman Raber Logging	31000 Township Road 213, Fresno, OH 43824	Logging
Golden Rose Pallet	54209 State Route 651, Baltic, OH 43804	Pallet Mfg
Henry Yoder	52293 Township Road 186, Fresno, OH 43824	Logging
JN Woodworking	54182 Township Road 88, Fresno, OH 43824	Furniture
Kent's Logging, LLC	31285 Township Road 330, Warsaw, OH 43844	Logging
L & M Logging	51179 Township Road 220, Baltic, OH 43804	Logging
Millcreek Lumber	33303 Township Road 219, Millersburg, OH 44654	Logging
Miller Sawing	33340 Township Road 125, Millersburg, OH 44654	Sawmill
Miller Sawing & Timber	33548 Township Road 125, Millersburg, OH 44654	Sawmill
Ohio Valley Finishing	30812 Township Road 213, Fresno, OH 43824	Furniture
Penwood Manufacturing	30505 Township Road 212, Fresno, OH 43824	Furniture
Reuben Yoder Logging	30100 Township Road 227, Fresno, OH 43824	Logging
Rocky Ridge Forestry, LLC	27692 State Route 93, Fresno, OH 43824	Logging
Superior Furniture By Hill Finishing	32795 Township Road 219, Millersburg, OH 44654	Furniture
Troyer Pallet Shop	31052 Township Road 227, Fresno, OH 43824	Pallet Mfg
Wisenco Logging Inc.- Craftwood Ind	24599 County Road 24 #8, Coshocton, OH 43812	Sawmill
Wlidcat Hardwoods	54185 Township Road 85, Baltic, OH 43804	Sawmill

Forestry Product Businesses

Layland

New Bedford

Baltic

Township of

Keene

Fresno

Canal Lewisville

Coshocton

West Lafayette

Google Earth

© 2018 Google

6 mi

© 2018 Google

West Lafayette

6 mi



APPENDIX G: WATER AND SEWER DEMAND CALCULATIONS

Appendix "G"
Water and Sewer Demand Calculations

Location	Developable Area (acres)	Employment	Number of Sites in Food Proudction Industry	Flow from Employees - including Peaking Factor (cfs)	Flow from I/I (cfs)	Flow from Processing - does not include Peaking Factor (cfs)	Total Flow (cfs)	Total Flow (gpm)	Total Flow (gpd)
GF Site #1	183.2	1000	3	0.21663	0.18320	0.23210	0.63193	284	408,397
GF Site #2	90.7	450	0	0.09748	0.09070	0.00000	0.18818	84	121,617
Shelly Site	46.3	400	1	0.08665	0.04630	0.07737	0.21032	94	135,922
Sabic	63.5	800	2	0.17330	0.06350	0.15473	0.39154	176	253,038
Papermill Road	22.6	400	1	0.08665	0.02260	0.07737	0.18662	84	120,606

Basis of Water & Sewer Demand Calculations:

Flow per Employee =	35.0	gallons per day (per the Ohio EPA Greebook for Commercial use (Division of Surface Water Design Standards, 2013 Version)
Process Water Flow per site in Food Processing Industry =	50,000	gallons per day (based on research of utility demand for Food Processing Industry with Site Selectors and Contractors)
Inflow & Infiltration (I/I) per Ten States	0.001	cfs per acre
Average Peaking Factor =	4.0	
1 gallon per day =	0.00000155	cfs

APPENDIX H: PARAMETERS FOR ESTIMATES OF PROBABLE INFRASTRUCTURE COSTS

Appendix “H”

Parameters for On-site and Offsite Infrastructure Estimates of Probable Project Costs

Roadway Infrastructure Improvements

Items included Site Access Intersection Improvements:

- Demolition
- Clearing and Grubbing
- Span wire traffic signal installations
- Pavement on US and State Highways per ODOT Specifications
- Underdrain
- Earthwork – including topsoil
- Assumed left turn lane length – 600’
- Assumed right turn lengths – 300’
- Maintenance of Traffic
- Traffic Control – signage and striping
- Storm sewer & pavement drainage – average pipe size of 24”
- Best Management Practices for meeting applicable water quality requirements
- Sediment and erosion control
- Restoration of disturbed areas

Items not included in Site Access Intersection Improvements:

- Storm water management infrastructure for peak runoff control for new or existing impervious area
- Bridge widening
- Culvert extensions
- Lighting
- Entry features
- Landscaping or street trees
- Inflation

Items included On-site Roadway Improvements:

- Clearing & Grubbing
- Curb & Gutter
- Underdrain
- Composite pavement section – 8” of concrete & 3” of asphalt
- 32’ of pavement, not including gutter
- Earthwork, including topsoil
- Street lighting
- Pedestrian facilities (required as a part of utilizing ODOT funding) – 5’ concrete sidewalk and 8’ asphalt shared use path on opposite sides of roads
- Traffic Control – signage and striping
- Storm sewer & pavement drainage – average pipe size of 30”
- Sediment & Erosion Control
- Permanent seeding & mulching
- Maintenance of traffic

Appendix “H”

Items not included in On-site Roadway Improvements:

- Best Management Practices for meeting applicable water quality requirements and storm water management infrastructure for provided peak runoff control for new or existing impervious area will be provided in regional storm water management ponds being constructed to serve the development site
- Private utility infrastructure
 - a. Assumes power and telecommunications lines will be installed above ground by utility company with applicable costs being charged to individual projects based on anticipated demands
 - b. Assumes gas lines will be installed by utility company with applicable costs being charged to individual projects based on anticipated demands
- Inflation
- Water system infrastructure
- Sanitary sewer system infrastructure

Sanitary Sewer Improvements

Items included in On-site and Off-site Sanitary Sewer Infrastructure:

- Pump stations – inclusive of wet wells, valve vault, valves, pumps, piping and electronic equipment, control panels, back-up generator and power supply
- Gravity sanitary sewer piping – sizes as noted in the recommended improvements
- Force main piping, valves & appurtenances – 6” average diameter
- 4’ Diameter Manholes
- Service wye connections installed with the mainline
- Restoration
- Maintenance of traffic
- Sediment & erosion control

Items not included in On-site and Off-site Sanitary Sewer Infrastructure:

- SCADA control systems for pump stations
- Rock excavation
- Professional dewatering
- Well restoration
- Trenchless construction (tunneling, jacking & boring, casing pipe)
- Inflation

Water Main Improvements

Items included in On-site and Off-site Water Line Infrastructure:

- Ductile iron water piping, valves, fire hydrants and appurtenances – sizes as noted in the recommended improvements
- Restoration
- Maintenance of traffic
- Sediment & erosion control

Items not included in On-site and Off-site Water Line Infrastructure:

Appendix “H”

- Trenchless construction (tunneling, jacking & boring, casing pipe)
- Water booster stations
- Elevated storage tanks
- Pressure sustaining valves
- Inflation

Soft Cost Summary (40%):

- 9% - Professional services for survey, design, geotechnical investigation and construction staking
- 7% - inspection & testing
- 2% - permitting
- 2% - Construction management
- 20% - contingency
 - a. Right-of-way and easement acquisition (note the value easement and right-of-way donation within development parcels can be used to leverage public funding)
 - b. Utility relocations
 - c. Unknown field conditions such as but not limited to subgrade stabilization, rock excavation, professional dewatering, well restoration and mitigation costs associated with environmental permitting
 - d. Mobilization

APPENDIX I: LOCATIONS FOR VERIFICATION OF WATER SYSTEM CAPACITY

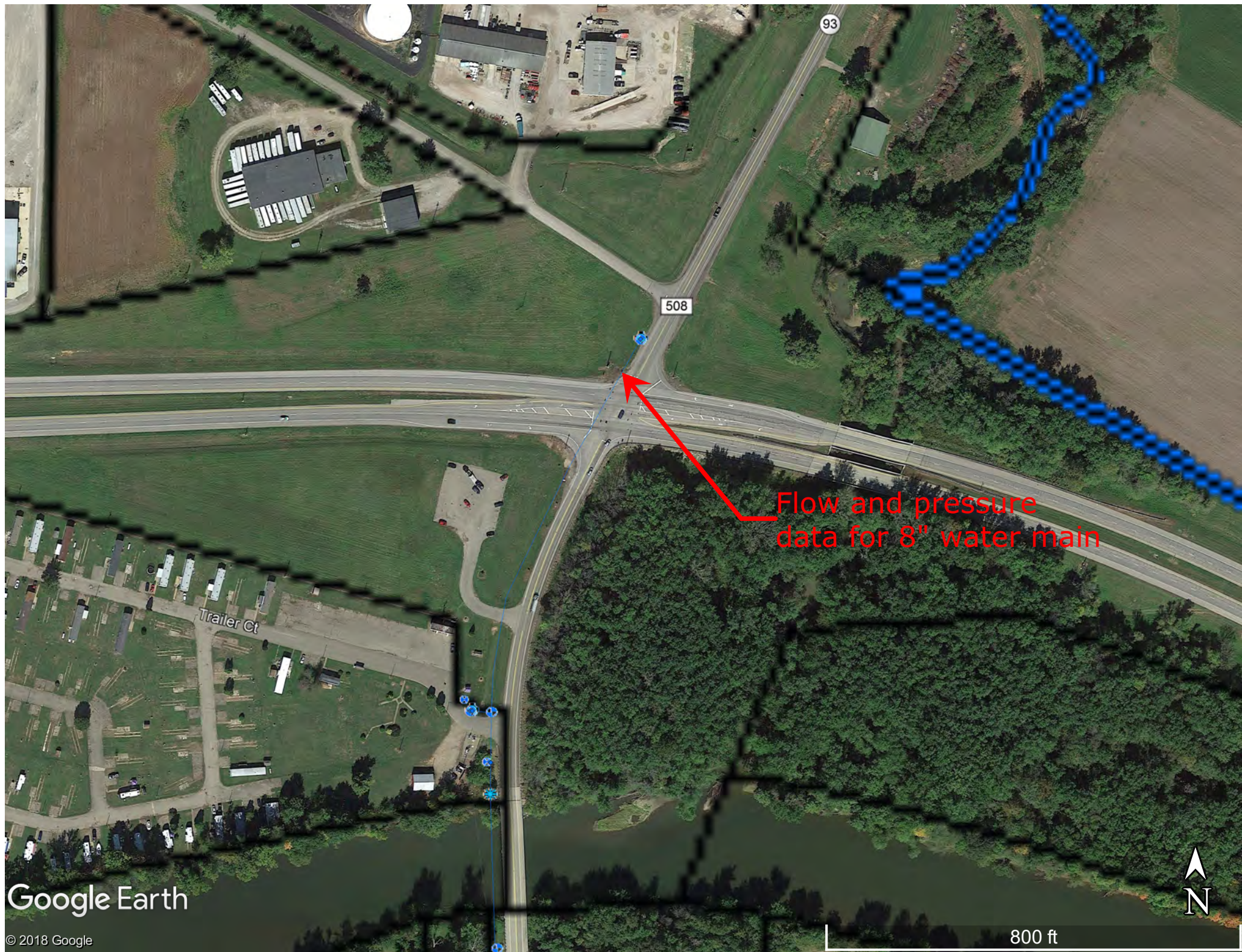


Google Earth

© 2018 Google



600 ft



Flow and pressure
data for 8" water main

APPENDIX J: LOCATIONS FOR VERIFICATION OF SANITARY SEWER SYSTEM CAPACITY

Mudport Basin

Verify Size and copies
of plans or as-built
data for gravity sewer
along CR621

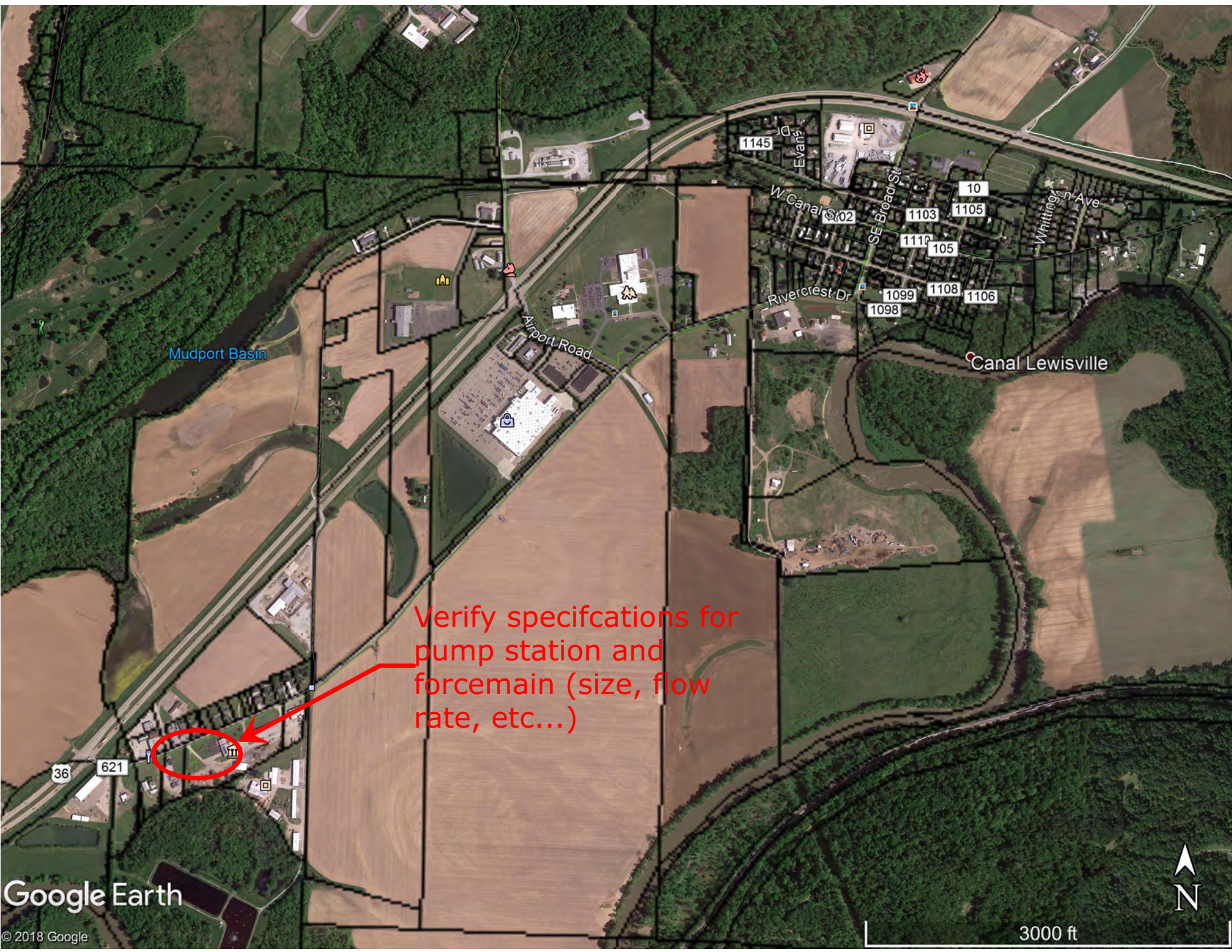
Verify size and copies
of plans or as-built
data from gravity
sewer along SE Broad
Street, Canal Drive
and Brenard St.

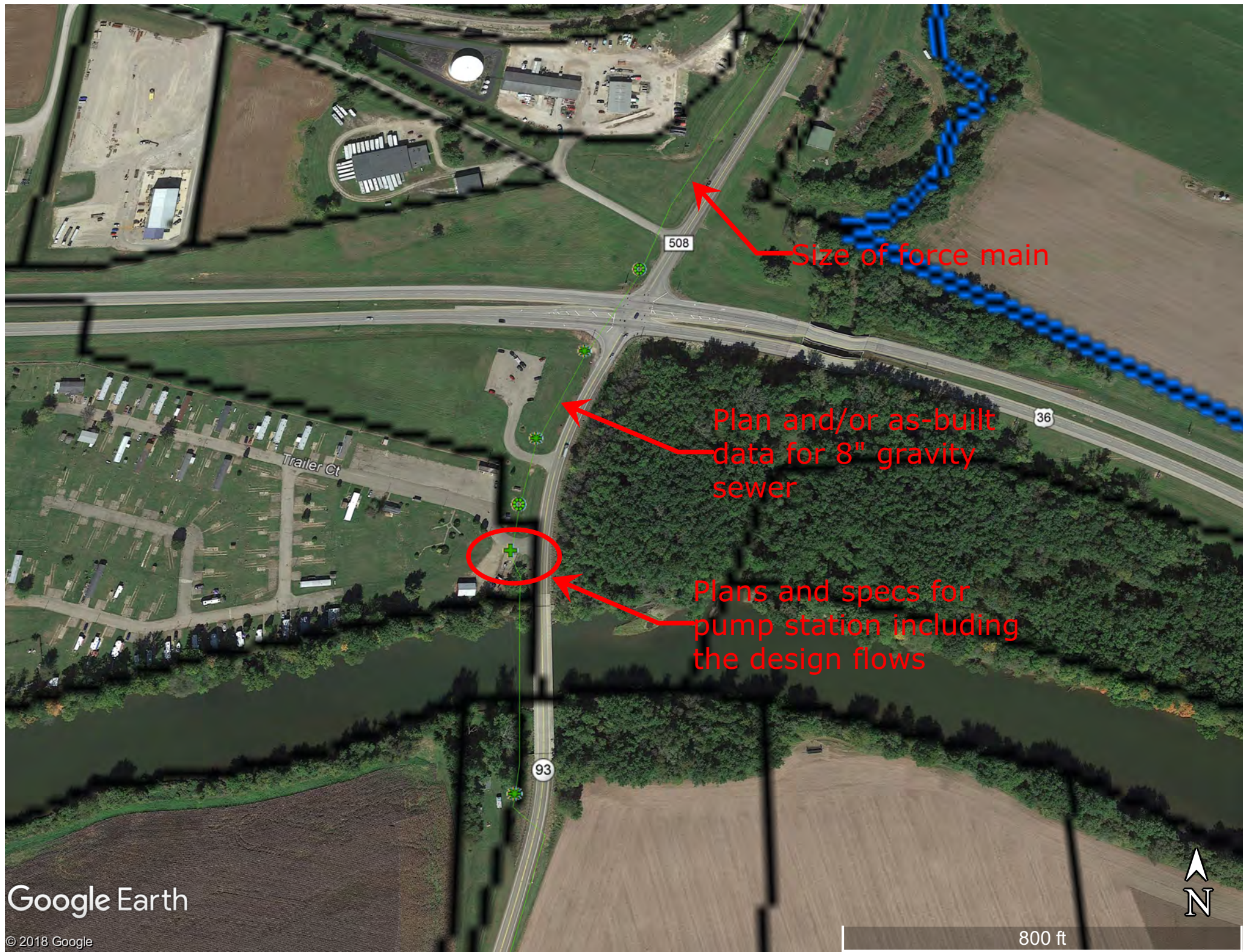
Google Earth

© 2018 Google

3000 ft







Size of force main

Plan and/or as-built
data for 8" gravity
sewer

Plans and specs for
pump station including
the design flows

APPENDIX K: TOP 100 FOOD PROCESSING COMPANIES

All figures are in millions of U.S. dollars						
Rank	Company Name	2016 Food Sales	2016 Food Assets	2016 Food Employees	2016 Net Income	2016 Net Assets
1	Walmart Inc.	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
2	Target Brands Inc. (S/US)	78,280	40,880	18,880	1,770	1,100
3	Wendy's (S/US & Canada)	18,750	20,000	27,000	9,000	10,000
4	Smith's Food & Drug	10,000	10,000	10,000	1,000	1,000
5	Costco Wholesale Corp.	70,000	20,000	10,000	1,000	1,000
6	Archer-Daniels-Midland	70,000	10,000	10,000	1,000	1,000
7	John Deere	10,000	10,000	10,000	1,000	1,000
8	Smithfield Foods Inc.	10,000	10,000	10,000	1,000	1,000
9	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
10	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
11	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
12	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
13	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
14	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
15	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
16	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
17	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
18	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
19	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
20	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
21	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
22	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
23	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
24	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
25	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
26	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
27	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
28	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
29	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
30	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
31	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
32	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
33	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
34	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
35	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
36	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
37	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
38	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
39	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
40	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
41	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
42	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
43	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
44	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
45	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
46	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
47	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
48	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
49	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
50	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
51	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
52	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
53	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
54	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
55	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
56	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
57	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
58	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
59	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
60	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
61	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
62	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
63	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
64	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
65	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
66	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
67	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
68	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
69	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
70	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
71	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
72	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
73	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
74	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
75	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
76	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
77	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
78	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
79	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
80	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
81	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
82	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
83	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
84	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
85	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
86	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
87	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
88	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
89	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
90	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
91	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
92	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
93	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
94	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
95	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
96	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
97	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
98	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
99	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000
100	Archer-Daniels-Midland	10,000	10,000	10,000	1,000	1,000

Source: Food Processing Magazine, <https://www.foodprocessing.com/top100/top-100-2017/>

APPENDIX L: INDUSTRIAL PARK BENCHMARK PROFILES

ENDNOTES

1. <https://tradingeconomics.com/united-states/balance-of-trade>
2. <http://www.lsc.ohio.gov/fiscal/ohiofacts/2016/economy.pdf>
3. Ibid.
4. Ibid.
5. Ibid.
- 6.
7. Ibid.
8. Ibid.
9. See <http://www.eda.gov/Research/ClusterBased.xml>.
10. Robert P. Giloth, "Learning From the Field: Economic Growth and Workforce Development in the 1990's," *Economic Development Quarterly*, 14, 4 (November 2000) 340–359, 345.
11. Coshocton, Holmes, Guernsey, Knox, Muskingum and Tuscarawas.