



DECEMBER 2013

FINAL REPORT

Research on Secondary Material Industries in Southeast Ohio

COMMISSIONED BY:



PREPARED BY:

RESOURCE RECYCLING SYSTEMS



416 Longshore Drive, Ann Arbor, MI 48105

PHONE: 734-996-1361

www.recycle.com

Research on Secondary Material Industries in Southeast Ohio

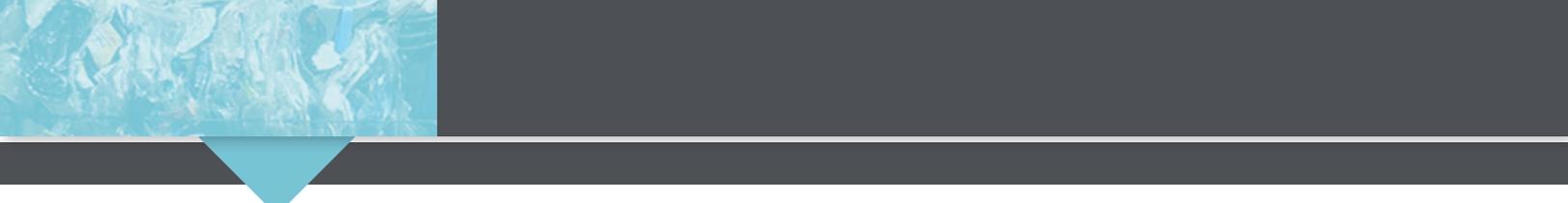
Executive Summary

The goal of this project was to understand the secondary materials industry in southeast Ohio today, and to uncover pathways for further growth in this area. As such, businesses that process secondary materials in the counties of Adams, Athens, Belmont, Carroll, Coshocton, Gallia, Guernsey, Harrison, Highland, Hocking, Holmes, Jackson, Jefferson, Lawrence, Meigs, Monroe, Morgan, Muskingum, Noble, Perry, Pike, Ross, Scioto, Vinton and Washington were surveyed for details on feedstocks, size, opportunities, barriers, and other key industry information. Specifically, 33 businesses were contacted by phone, and 67 percent of them – 22 businesses – provided data. Toward the end of the survey period an additional 20 businesses were uncovered, but not surveyed. Gathering information from these additional businesses would round out the study and maximize its utility.

The results from the businesses that were reached showed a wide-ranging and robust secondary materials industry in the region. Many of the businesses were operating at capacity. Other businesses were looking to expand. Most of the businesses source their material nearby, meaning they are helping the economy of the region directly and indirectly. Results also uncovered opportunities to help these businesses find a stable supply base and better market their goods.

Expansion of the study to include the entire state would make the data more valuable, as increasing the sample size would enhance the ability to perform data analysis and identify trends. Not only would this would better define the important role of the secondary material industry in Ohio, it would also show opportunities for growth, efficiencies and assistance.

This project was conducted in partnership between Rural Action, the Appalachian Partnership for Economic Growth, and RRS.



Background and Purpose

At the onset of this project, there was no complete database of businesses and industries in southeast Ohio that are using secondary (recycled) materials. Rural Action (RA) and the Appalachian Partnership for Economic Growth (APEG) sought to fill this gap through a survey to understand the status and economic impact of this industry in the region and identify opportunities for synergies and growth. Once in hand, this information could be shared with economic development agencies, elected officials, processing facilities, haulers, brokers, material collection services and others, creating plans and partnerships to take advantage of these opportunities. Benefits could include job growth, industry growth, more efficient use of resources coming from or flowing through Ohio, and filling gaps in the regional recovered materials value-chain. Future assistance could include attracting capital for business expansion, sourcing local and regional feedstock, new marketing strategies, and creating greater efficiencies within the supply chain.

The driving forces behind this work – RA and APEG – are each mission driven to forward sustainable development and business growth. RA is a sustainable development organization that has been servicing the southeast Ohio region for over 20 years. It plays the role of an intermediary, assisting in building beneficial relationships and resources tied to economic and environmental efforts throughout the region. APEG is a subsidiary of the Ohio Appalachian Business Council, and is committed to accelerating sustainable business growth, catalyzing job creation and advancing the economy of Southeast Ohio. APEG also seeks to retain existing jobs and spur investment in the region.

The majority of the project work was handled by RRS – a national consultancy comprised of a team of strategists, engineers, economists and communications specialists with core strengths in materials and recovery, coupled with expertise in life cycle management and applied sustainable design. These experts operate confidently across the supply chain, identifying the most leveraged opportunities to affect change, and developing pathways to long-term value. RRS has been managing change in a resource constrained world since 1986.

Project Details

DEFINITIONS

The definition used in forming the list of businesses and the geographic range of these businesses is described here.

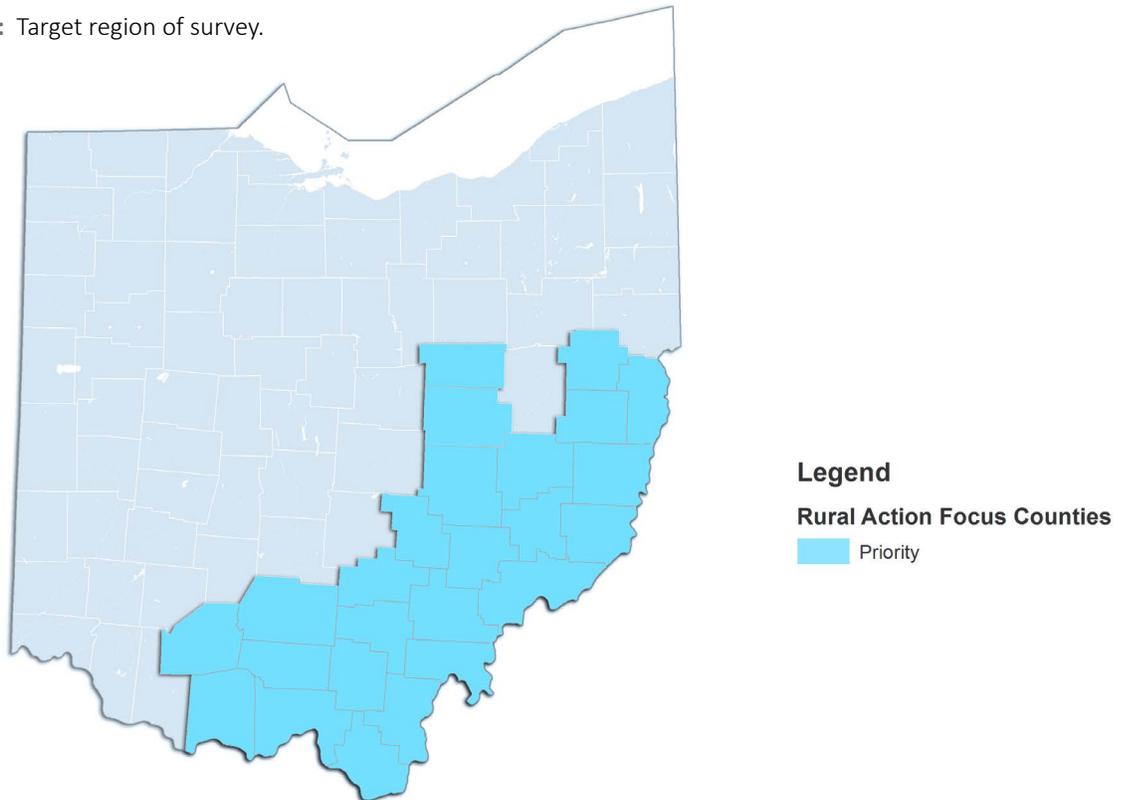
Definition of Secondary Material Industries:

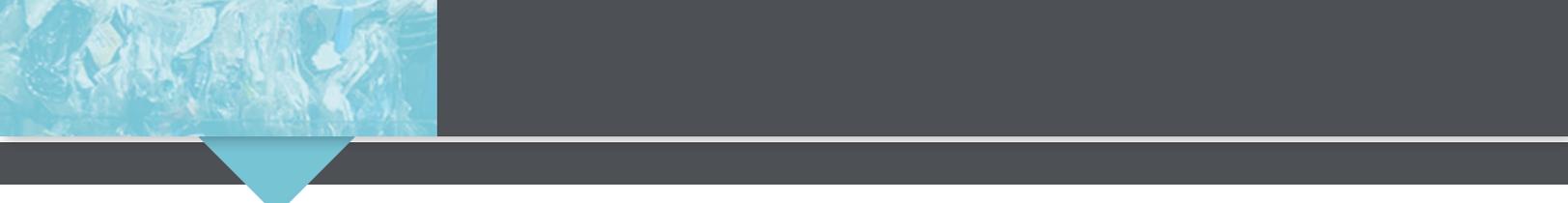
Businesses that purchase recovered/recycled materials to be further processed or value-added for new or repurposed products. These materials include both traditional recyclable commodities and hard to recycle materials such as electronics, filmy and rigid plastics, and other materials. Operations can include small, medium and large businesses/industries.

Geography covered:

The region serviced by the Appalachian Partnership for Economic Growth (APEG). These counties include: Adams, Athens, Belmont, Carroll, Coshocton, Gallia, Guernsey, Harrison, Highland, Hocking, Holmes, Jackson, Jefferson, Lawrence, Meigs, Monroe, Morgan, Muskingum, Noble, Perry, Pike, Ross, Scioto, Vinton and Washington. These counties are highlighted in Figure 1.

FIGURE 1: Target region of survey.

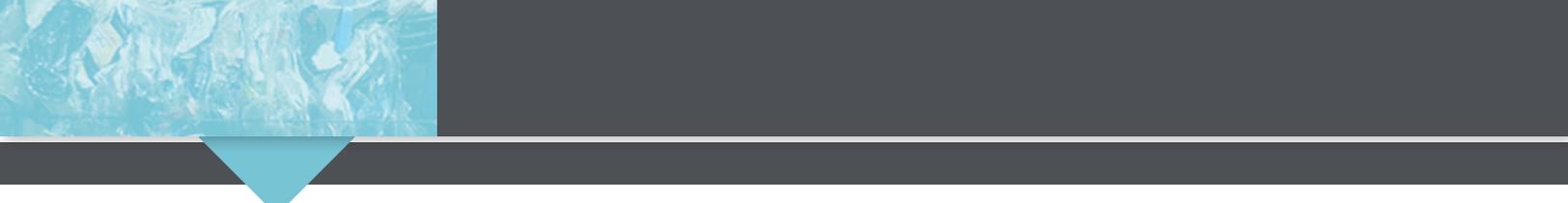




METHODOLOGY

A survey of businesses using secondary materials as feedstocks in the targeted geographical area was identified as the best method for gathering the information key to meeting project goals. With that in mind, the following steps were identified and undertaken:

- Identify the most critical data that would be useful for the goals of this survey.
- Translate these needs into a brief survey (see Appendix A), along with a boilerplate script and answers to anticipated questions (see Appendix B). Craft these materials to efficiently engage businesses, capture the desired information, and provide insights into actionable solutions.
- Develop a list of secondary material industries in the target region. As part of this research, reach out to contacts and partners, such as the Ohio EPA and the Ohio Department of Natural Resources.
- Create database for capturing and analyzing responses.
- Conduct survey process – Contact business by phone (selected over online or mailed surveys to maximize responses), identify and speak to most appropriate representative, explain purpose of survey and encourage participation, conduct survey, capture survey responses.
- Analyze the results through statistical and analytical methods, creating charts, graphs and maps that call out trends and key observations.
- Capture and discuss results, and provide insights and recommendations, in a summary report.



Results and Discussion

RA, APEG and RRS collaborated to develop the survey questions and boilerplate script in mid-November, 2013. As intended, these materials were kept brief and specific to gather the critical data without using too much time of the targeted businesses. Additionally, a database was created to efficiently capture the information in a format suitable for analysis.

At the same time, the list of businesses to survey was developed. This was a process that continued throughout the project period of mid-November to Mid-December, and each week additional targets were uncovered. Ultimately, 53 businesses were identified, though 20 of them were uncovered too late for surveying.

Of the 33 businesses RRS attempted to survey, information was successfully captured from 22. This translates into a 67 percent response rate, which is relatively high given the short timeframe, the fact that these were all “cold-calls”, and the challenges of weaving through each company’s directory to identify the most appropriate person for the survey. In most cases the person who proved best-suited to respond to the survey was the CEO in a small company, or the Purchasing Manager in a larger company.

Of the 11 businesses that were approached but not reached, only 1 refused to be surveyed. The others proved difficult to reach despite multiple attempts. The timing of the survey – at the onset of the holidays, and beginning during the week of Thanksgiving – surely did not help matters.

Of the 22 businesses that agreed to fill out the survey by phone, most provided answers for almost all of the eleven questions. A few of the questions received a lower response rate. These notably included question 2, which only 15 of the 22 businesses answered, question 5, which 16 of the businesses answered, and question 11, which 12 of the businesses answered. Question 2 queried how much of the recycled material that the business uses in a year. Some businesses considered this to be confidential and others were uncertain of annual totals. Question 5 involved unused capacity. Many of the same businesses that did not answer question 2 declined to answer this question. The question with the lowest answer rate was question 11, which requested information on the company’s annual revenue. Only 12 businesses (just over half of the total respondents) shared this detail; five specifically stated that this was confidential – a legitimate, expected business practice. Additional inquiry through tax filing, land records and other filings could further develop these understandings.

The responses of these businesses were captured in the database, and the information was normalized to allow for accurate analysis. At the completion of the survey period, the normalized data was graphed, mapped and analyzed. The results for each survey question are discussed here.

1) What recycled materials does your company use as feedstock?

The secondary materials used in this region cover the gamut of recyclables, including all of the following: electronics, paper, paperboard, books, metals (aluminum and steel most commonly), PVC, PE, PP, plastics 1-7, glass, organics, textiles, ceramics, wood, and asphalt. Responses were widespread, with no single type of industry dominating the landscape. The largest category came in at a tie between plastics and paper (including paperboard and books); both of these categories of feedstock were used by five businesses. Metals were the next largest category, at four businesses.

The type of materials used can be seen in Figure 2 below. This map shows all of the secondary materials businesses for which location and material type are known today. As can be seen from the map, this industry is spread over much of the region of interest. Indeed, businesses fitting the definition were found in most target counties.

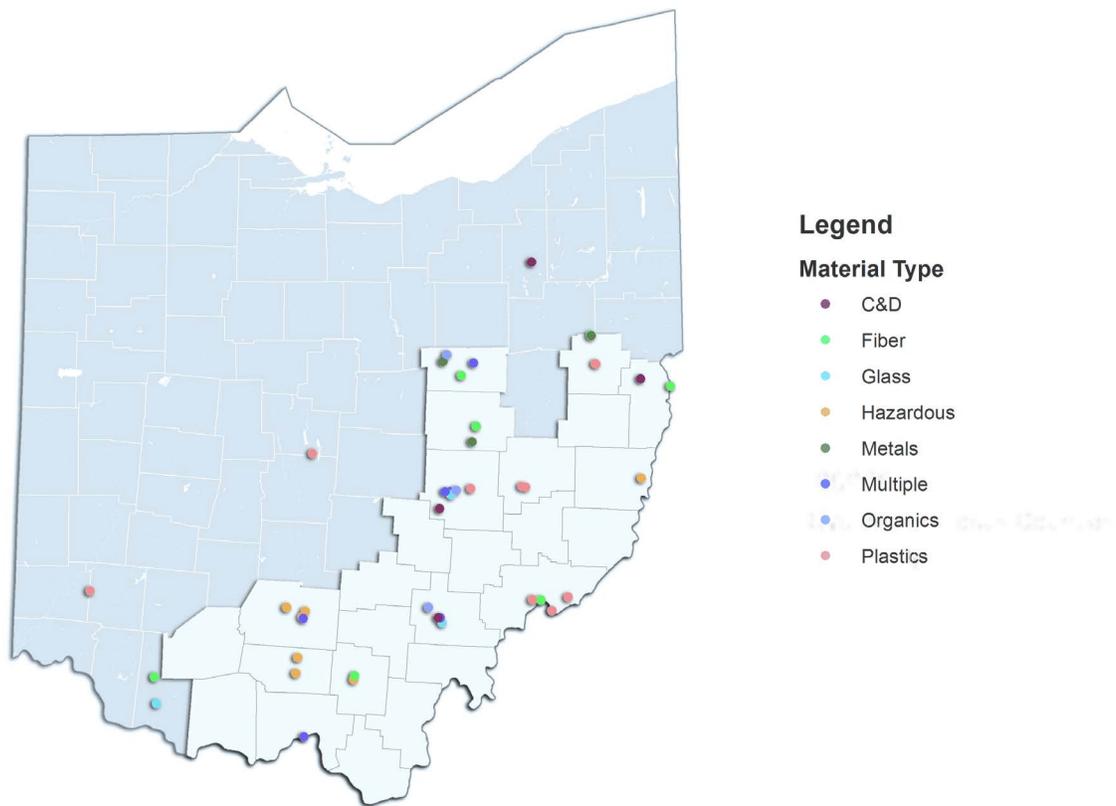


FIGURE 2: Types of secondary materials used as feedstock in southeast Ohio

Looking at figure 2, a few pockets of material types can be identified. There is a concentration of businesses operating in the hazardous materials recycling category in the south-central part of the state. There are two pockets of plastics businesses, one in Washington County and one across Muskingum and Guernsey Counties. Lastly, all of the identified businesses that source recycled metals are in the northern part of the target region. The reason for these pockets is unclear without further exploration, but other industries in the area may be a factor.

2) How much of each of these materials does your company use in a year?

Amounts of purchased recycled material range from 5 tons per year to 100,000 tons per year, as displayed in Figure 3.

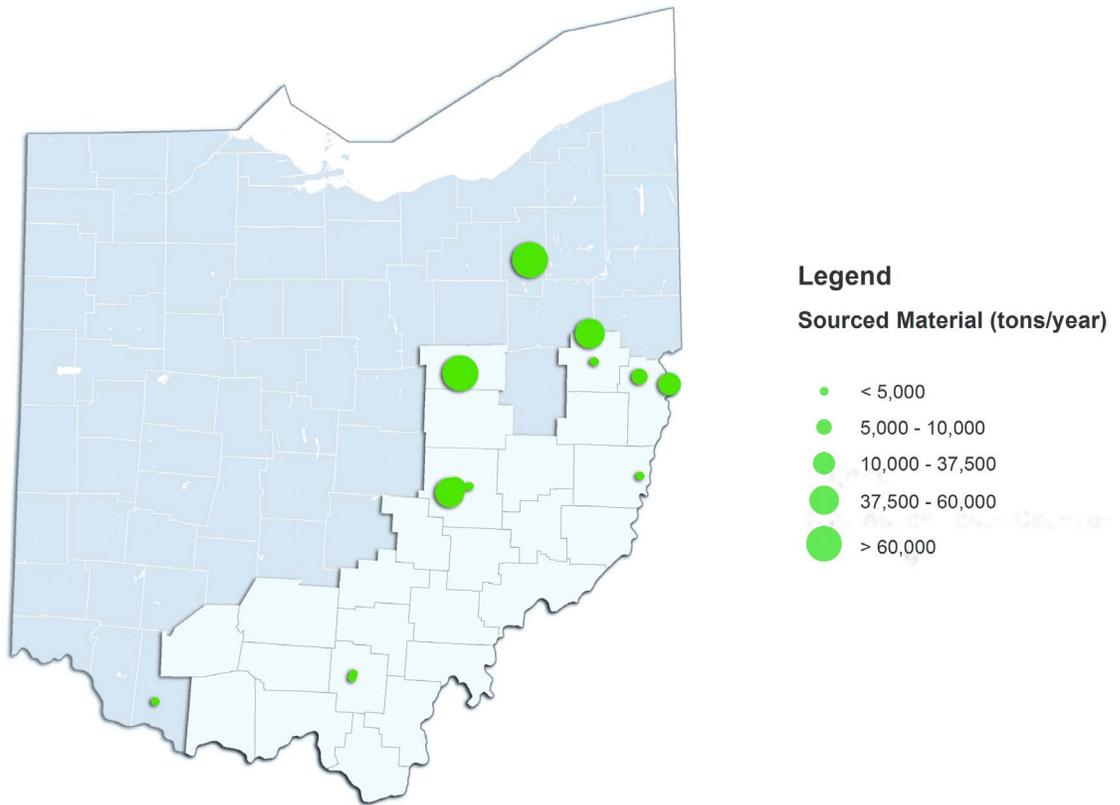


FIGURE 3: Tons of recycled material sourced to these locations

As seen in the map, the northern portion of the region holds the largest industries from a tonnage standpoint, whereas those sourcing less material are spread across the region.

The four businesses sourcing the highest tons represent the paper, metals, asphalt and glass industries.

3) How far away do you source materials?

- a. How much of these materials do you source from within Ohio?
- b. Within the U.S.?

(For discussion purposes, these results will be presented along with those of Question #4.)

4) How far away do you sell your products?

The following chart (Figure 4) shows the geographic reach of the businesses in the survey, comparing the recycled material coming in vs. the company's end product going out.

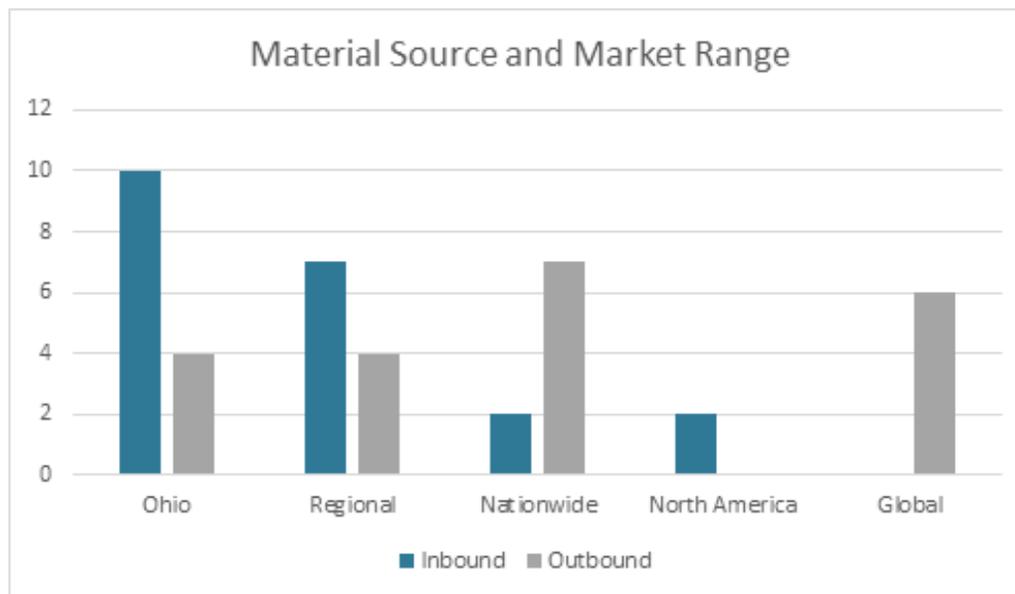


FIGURE 4: Geographic reach of recycled material coming in and end product sent out of the businesses surveyed

The chart above shows that the vast majority of businesses surveyed source recycled material locally, while many sell their end product nationwide or on a global scale. Sourcing locally makes economic sense for these businesses, as they incur the least amount of shipping charges in the material they buy. Many of the heavier materials are limited in how far away they can source, due to excessive freight charges. This includes those dealing in glass, metals, and large paper roll goods. Selling to a large and geographically diverse audience, on the other side of the business, maximizes sales.

This analysis makes clear that one thing that the region can do to sustain the secondary materials industry is to make sure the local and regional sources of recycled feedstock are stable.

5) Does your current operation have capacity to use more of these materials? If so, how much more?

Of the 16 businesses that responded to this question, about half have at least some unused capacity without adding equipment. Most of these indicated they could at least double the amount of recycled material they are bringing in. A few would do this by increasing the percent recycled content in their finished product, while most would ramp up both input and output evenly. The feedstocks used by the businesses that could at least double their intake were spread out among:

- Electronics (2)
- Black Polypropylene
- Organics
- Ceramics
- Glass (2)
- Asphalt, concrete

The other half of the businesses indicated that they are already running at capacity.

While unused capacity does present an opportunity to source additional feedstock from within Ohio, the spread in the materials among the businesses with the biggest capacity opportunities diminishes the potential effectiveness of one effort to help all of these businesses reach capacity. For the two businesses with excess capacity to bring in more glass, one was interviewed in detail about this topic and they explained that while there is plenty of waste glass in the state, glass must usually be sourced from within a very narrow radius to make it cost effective, and this particular business was located in a very rural area without a lot of supply.

The results show some opportunity to source more end-of-life electronics and Construction & Demolition materials (ceramics/bricks, asphalt, concrete) into the region.

6) What types of products do you manufacture from these recycled materials?

The types of products manufactured from recycled materials in this region varies widely. In fact, the answer was different for almost every responder. Many of the incoming recycled materials become clean feedstocks that are used by other manufacturers. This makes sense as Ohio has historically been a manufacturing region.

A list of responses is included here:

- Plastic lumber
- Paper tubes
- Pure aluminum
- PVC pipe
- Bags
- Coiled steel
- Corner protectors for items on pallets
- Chipboard
- Resin
- Fertilizer
- Landscape edging
- Mats
- Used books
- Bagged ground ceramics
- Used pallets
- Stone base
- Liquor bottles
- Decorative glass items

7) What are your biggest challenges in sourcing these recycled materials? (e.g. quality, volume, price, etc.)

Quality was the most mentioned challenge when this question was asked. Quality was mentioned 7 times in response to this question, price or price volatility was mentioned 4 times, ability to secure enough volume was mentioned 3 times, and logistics was mentioned 1 time.

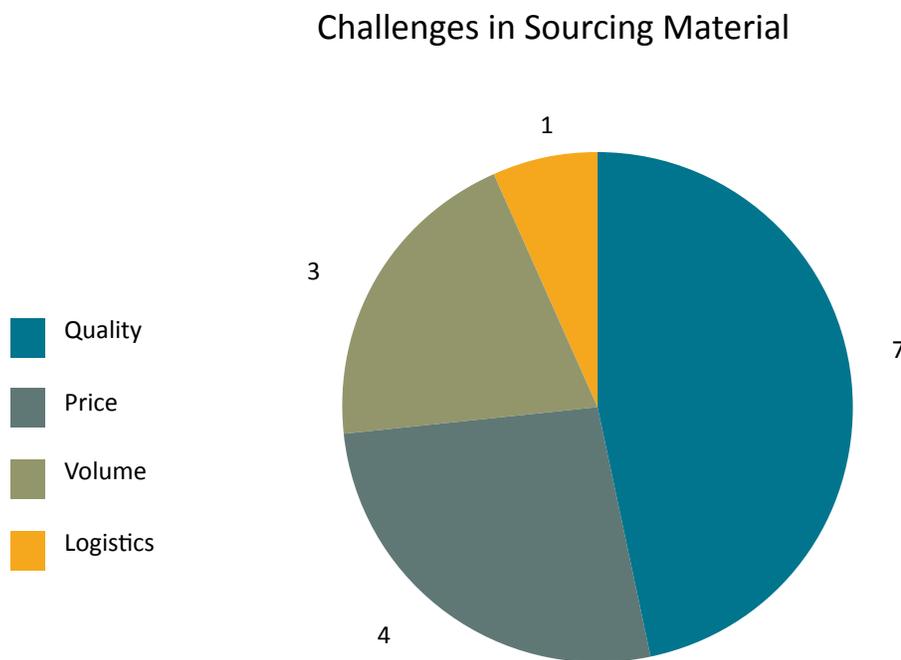


FIGURE 5: Number of responses to the question of biggest challenge in sourcing of the recycled materials

8) What other challenges do you face with these recycled materials? (e.g. contamination that exceeds tolerance)

The top answer to this question was finding a market for hazardous components of the company's process or assistance with regulations on these hazardous components. This was noted by those dealing with electronics, biosolids, and the cleaning of contaminated metals. This insight suggests that future work might be categorized to include nuisance/specialty materials, along with organics and core recyclables.

Additionally, the following answers were given by two businesses each:

- Occasional quality issue of incoming lot being burnt (plastic) or of variable caliper (paper).
- Price stability of either the incoming material or of the finished good.
- Lack of marketing staff and knowledge, which could increase sales (decorative glass and ceramics/clay).

Of these issues, lack of marketing staff and knowledge may be the most straightforward to address. Perhaps grant funding or partnerships with university marketing students would be options for addressing this need.

9) Do you have plans for expansion? If so, by how much?

What types of assistance would you need to help you expand?

Of the respondents to this question, 8 answered yes, 10 answered no (Figure 6). Of those who do have plans for expansion:

3 expressed a desire for help in marketing their product or in creating a bigger market for their products.

These products were:

- Coiled steel
- Custom molded goods (e.g. boxes) made from recycled PP
- Decorative glass

2 requested help locating higher feedstock volume.

Their feedstocks are:

- Paper (all varieties)
- Books

3 noted money to help buy equipment/capital would be welcomed. These businesses operated in electronics recycling and chipboard production.

The responses to this question provide on the ground, actionable direction for assisting in the development of the secondary materials industry in Ohio.

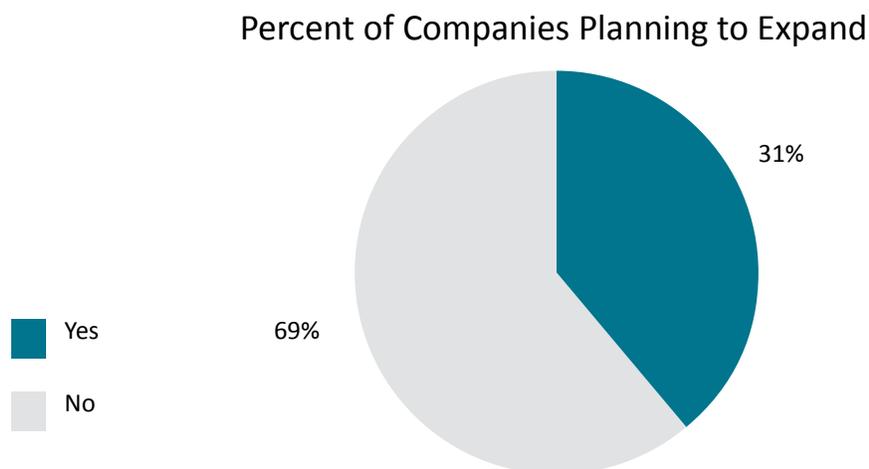


FIGURE 6: Percent of Companies with plans for expansion

10) How many employees do you currently have?

The number of employees among respondents ranges from 3 to 375, though most were in the 20 to 100 range. This range is common for manufacturing operations that produce a specific range of items.

The number of employees employed in this industry across the region is highlighted in Figure 7.

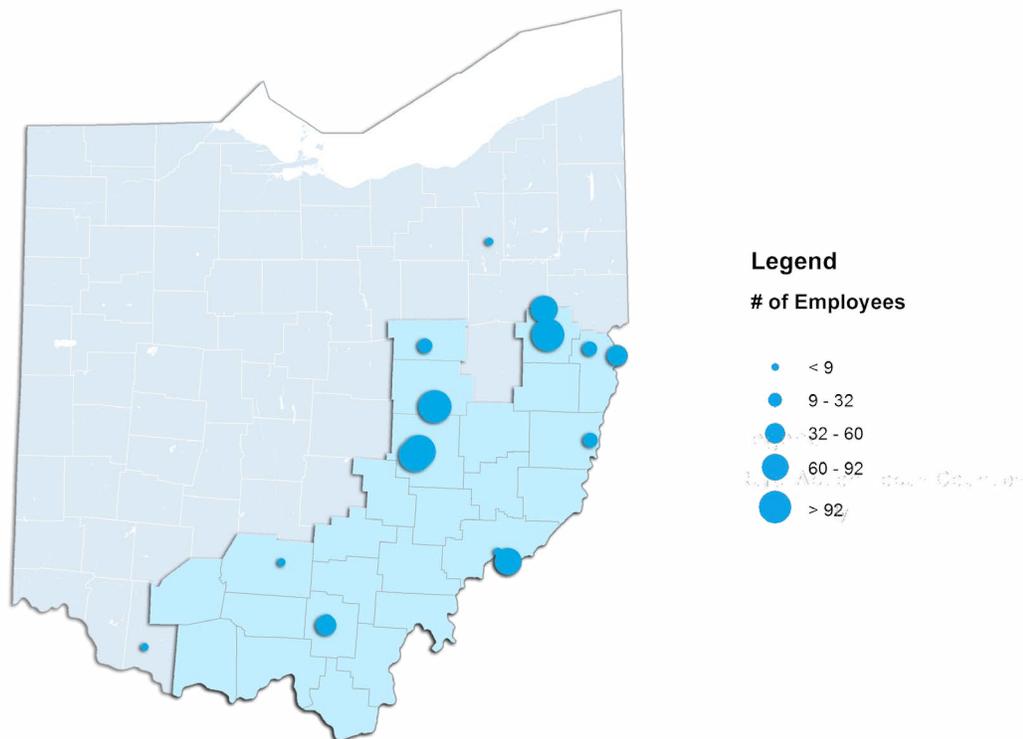


FIGURE 7: Number of employees currently employed in the secondary materials industry by companies who responded to the survey

The total number of employees at responding companies was 1,431. The total number of secondary material industry employees in the region is unable to be verified without further work, but 20 new businesses were identified after the survey period and thus haven't been counted.

While the northern part of the region has the majority of larger firms, the southern part of the region has two larger businesses and numerous smaller businesses.

II) What is your annual revenue?

Annual revenue was the least-answered question, with only 12 businesses responding. Of these businesses, revenues range from \$100k to \$30 million. The range of revenues is displayed in Figure 8.

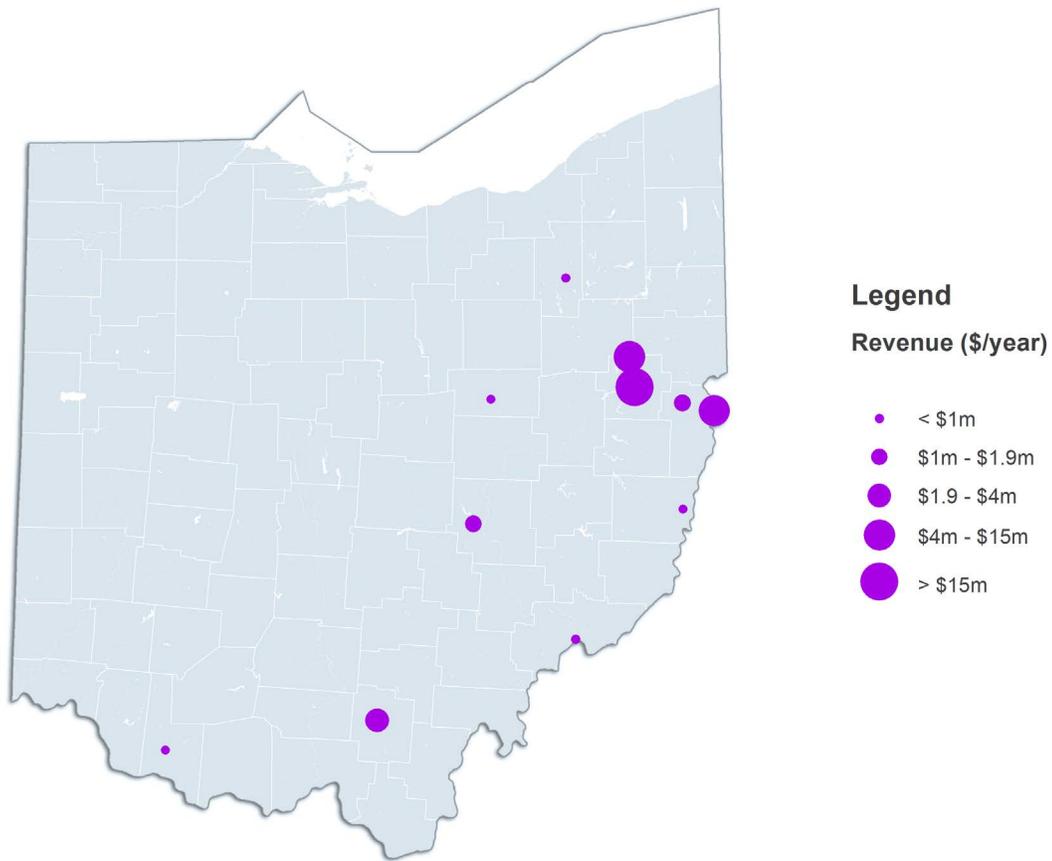


FIGURE 8: Revenue ranges among survey respondents.

Another way to look at the size of businesses in this industry today is by combining both number of employees and revenue, as in the chart below. Because only 12 businesses provided revenue figures, the data is somewhat limited at this time. In general the results show that the majority of businesses are on the smaller side, and that there is a correlation between high revenue and a higher number of employees.



Number of Employees and Revenue

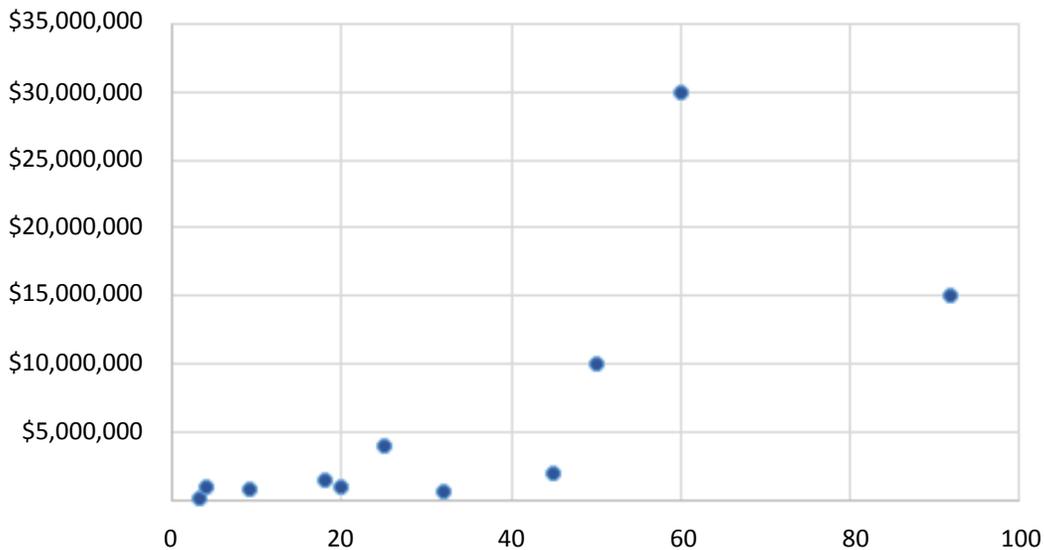


FIGURE 9: Size of Business by both Number of Employees and Revenue

Conclusions

Fundamentally, the survey provides evidence of a strong and diverse regional ecosystem of businesses who rely on recycled content for their products. This diversity, while making it difficult to draw universal conclusions, supports implementation of best practices in recycling collection systems to ensure that a wide range of materials are available in secondary markets within the region. While many of these businesses are small, some of the barriers to their expansion have the potential to be lowered through education and outreach (in the case of marketing assistance) or targeted grants (for specialized equipment). Successful expansion then has potential to create additional jobs, as well as increase demand for the underlying materials, potentially driving positive feedback in the reprocessing markets as well.

The data showed a combination of regionally sourced material and global marketing, which is encouraging, as the large geographic distribution of customers mitigates some risk of a local economic downturn collapsing the industrial ecosystem. Buying local ensures hauling costs for inputs are minimized along the value chain as well, saving money throughout the system.

Unfortunately, the small sample and the inconstancy of questions answered by respondents make drawing causal inferences between questions somewhat speculative. There appears to be a correlation between high revenue companies and those involved in creating construction materials such as gravel and asphalt, and companies that source material nationwide tend to be significantly smaller than those that source regionally, but it is not currently reasonable to extrapolate these data points with certainty across all businesses using recycled content in the region.

With a fairly small data set and a very broad material base among that database, universal policies that benefit all may be difficult to identify at this time. Focused efforts to meet the challenges of pockets of this industry, however, can still have positive economic and job growth benefits for the region.

A specific example of possible synergies amongst business in this field is that business #12 in the database states that one of its key needs is increasing the number of their paper suppliers, including books, to bolster supply assurance. The #23 business in the database indicates it sometimes has books it cannot sell which it then sends to shredders. These two businesses could be connected to see if one can become a supplier to the other.

A summary of conclusions from the data analysis and survey work are captured here for ease of reference:

The southeast Ohio region has a broad recycled materials industry, in terms of materials used, products made, and geographic spread.

- Most recycled materials in the region are sourced locally and resulting products are sold nationally or globally. Methods should be sought to ensure local sources of recycled material are numerous to increase stability for these businesses.
- Because of the diversification in the industry regionally, efforts to grow the industry may need to be individualized. Businesses with excess capacity include electronics, plastics, organics, C&D recycling and glass. Because they were willing to share this information, these businesses may be agreeable to longer discussions exploring ways to help them meet capacity and may be open to any individual assistance/partnerships that may result.
- Products made from recycled materials in the region are mainly industry-focused (vs. consumer-focused). Thus, efforts that increase manufacturing in the region would have a positive effect on the secondary material business as well.
- Improving the quality of feedstocks is a concern for some.
- Several businesses need assistance with hazardous materials handling and regulations.
- Connecting these businesses with marketing capability is an unmet need.
- About half of the businesses are looking to expand.
- By indication from this sample of businesses, the jobs in this industry are not insignificant to the region, and with many looking to expand or increase capacity, there is potential for growth.

Next Steps and Opportunities

This report offers a great first step into understanding the secondary materials industry in southeast Ohio today, and insight into how to leverage this industry for job and economic growth. This project was completed on an extremely tight timeline and relatively small budget. Opportunities exist for maximizing potential uses for this data, both locally and on a broader scale.

Clearly, the first opportunity is to act on the conclusions drawn in this report for the good of those businesses in the region, along with the benefit of Ohio's economy and environment. This will involve targeted planning, meetings, on the ground work, and intelligent execution, but the results should be worth the effort.

More specifically, the following key points warrant further exploration and action:

- Most recycled materials in the region are sourced locally and resulting products are sold nationally or globally. Methods should be sought to ensure local sources of recycled material are numerous to increase stability for these businesses. This should include general support and guidance to recovery programs, along with targeted actions for each specific material that enjoys heightened local demand.
- Because of the diversification in the industry regionally, efforts to grow the industry may need to be individualized. Businesses with excess capacity include electronics, plastics, organics, C&D recycling and glass. Because they were willing to share this information, these businesses may be agreeable to longer discussions exploring ways to help them meet capacity and may be open to any individual assistance/partnerships that may result. This information should be a priority, and appropriate organizations and agencies (notably including RA and APEG) should be involved in efforts and discussions.
- Products made from recycled materials in the region are mainly industry focused (vs. consumer focused). Thus, efforts that increase manufacturing in the region would have a positive effect on the secondary material business as well. Involvement of economic development organizations and the State are appropriate.
- Improving the quality of feedstocks is a concern for some. As in the first bullet, general support should help with this. Further, the sources of specific feedstocks could be investigated for improvement opportunities. This should be a portion of the next phase of research.
- Several businesses need assistance with hazardous materials handling and regulations. OEPA and Ohio DNR could both play a role in meeting this need.
- Connecting these businesses with marketing capability is an unmet need. Grant funding and small business assistance are both worth consideration.
- About half of the businesses are looking to expand. Economic development and grant support from private and public sources should be brought to bear on this opportunity.
- By indication from this sample of businesses, the jobs in this industry are not insignificant to the region. With many looking to expand or increase capacity, there is potential for growth, which should be fostered.

In the planning for and pursuit of these actions, the influence, capabilities and expertise of key partners should be leveraged. These notably include OEPA to assist with regulatory issues related to hazardous materials, Ohio DNR for technical assistance and grant funding, RA and APEG for economic development, legislative work, further outreach to the secondary materials industry and support of additional research, and Ohio Jobs to fund a larger review.

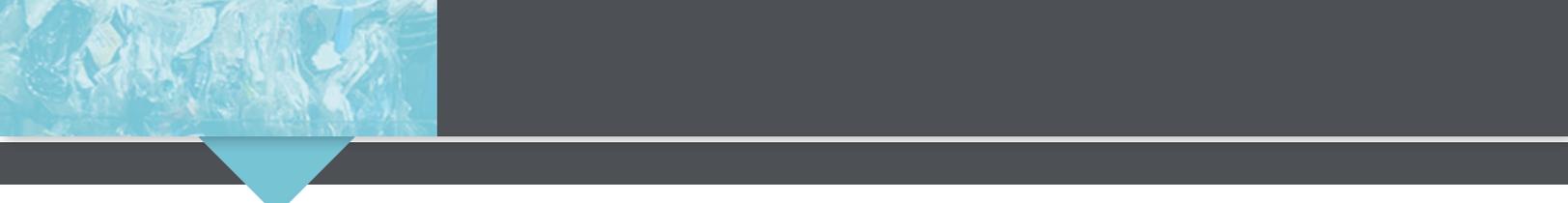
Another obvious action, while staying in southeastern Ohio, is to survey the additional 20 businesses that have recently been found within the region. While information from many of the largest players has already been captured, some may not have been, and these businesses should be explored to understand their provided services, size, contribution and needs. This would provide a more complete overview of the secondary materials industry in southeastern Ohio today, making this data set that much more powerful and useful.

Expansion of the geographic scope of the study to cover all of Ohio deserves serious consideration. This would offer greater insights into the scope, impact, needs, potential synergies, and realistic improvements and growth of the secondary materials industry across the entire state. In searching for businesses within the southeastern region, many businesses were already identified in the rest of Ohio, which could serve as groundwork for statewide information.

If a statewide database is pursued, RRS recommends a considerably longer timeframe to complete the survey; at least 3 to 6 months. This would allow more budgetary and operational efficiencies by starting with lower-touch, reduced-cost survey methods such as an internet survey, then following up with other methods for the harder to reach businesses. It would also provide additional opportunities to locate all relevant businesses and increase the response rate.

Another worthwhile opportunity is to expand the scope of the work to other types of material handlers in the supply chain. This could be done within the region or, better still, statewide. Examples include material recovery facilities (MRFs), material extraction companies, and end-product producers. By mapping the supply chain in Ohio, synergies could be identified on a much larger scale. MRF's may be able to supply existing manufacturers in the state, end-product producers could incorporate some (or more) secondary materials into their feedstock, and so on. RRS has an extensive and up-to-date MRF database which could assist a great deal in this effort.

Whether the project stays regional or grows broader, there are a number of groups that the results of this project could be shared with, to maximize the value of the project and to get more input into how this data can be used and what it should look like to be most helpful to all parties. It is recommended that this report be shared with economic development agencies and elected officials in Ohio. The report should also be shared with haulers and brokers to discuss the opportunities around supply chain improvements. Additional recipients for consideration include those looking to invest in the region, and producers of end products that might use these recovered feedstocks. These stakeholders and interested parties have a stake in furthering the success and growth of Ohio's secondary materials industry. They are all potential partners and funders of additional research and larger project efforts. Each should be approached with this in mind, and ideally with specific funding and support goals mapped out to maximize success.



There are numerous opportunities for the secondary materials industry in southeast Ohio. Now, with this data in hand, this knowledge can be put to work toward elevating this industry in the region and beyond. With additional data from across the state, this information would become even more meaningful and impactful. As future plans to expand and act on this information are formulated, RRS is both well-suited and eager to be involved. We have a three-decade history in leading the recovery sector, an exceptional recovery database and technical capabilities, intimate knowledge of the region, and we continue to be excited to participate to ensure this knowledge reaches its potential for benefit to Ohio.

Lastly, we would like to extend a warm and heartfelt thank you to the businesses that participated in this survey. We understand that each individual we spoke with is extremely busy, and we hope the information and resultant analysis will bear them benefit.

Appendix A

Secondary Material Industries Survey Questions

- 1) What recycled materials does your company use as feedstocks?
- 2) How much of each of these materials does your company use in a year? (If they can more easily provide this information on a daily, weekly, or monthly basis, extrapolate for them)
- 3) How far away do you source materials?
 - a. How much of these materials do you source from within Ohio?
 - b. Within the U.S.?
- 4) How far away do you sell your products?
- 5) Does your current operation have capacity to use more of these materials? If so, how much more?
- 6) What types of products do you manufacture from these recycled materials?
- 7) What are your biggest challenges in sourcing these recycled materials? (e.g. quality, volume, price, etc.)
- 8) What other challenges do you face with these recycled materials? (e.g. contamination that exceeds tolerance)
- 9) Do you have plans for expansion? If so, by how much? What types of assistance would you need to help you expand?
- 10) How many employees do you currently have?
- 11) What is your annual revenue?

Other information to capture:

- Name of businesses
- Contact information/ Phone number
- Physical street address of operation
- City, zip code, and county
- Email address
- Website address

Appendix B

Boilerplate Script

Introduction Script

Hi, my name is _____. I'm with Rural Action and the Appalachian Partnership for Economic Growth.

We're talking to businesses like yours that use recycled feedstock in southeastern Ohio. We're working to pinpoint the economic impacts of the recycling industry in the region and to develop strategies for assisting and growing these businesses.

Could I ask you a few questions about your feedstock, products, staffing, and needs?

Who Rural Action and Appalachian Partnership for Economic Growth are: Share this if they ask.

Rural Action is a sustainable development organization that has been servicing the southeast Ohio region for over 20 years. Rural Action plays the role of an intermediary, assisting in building beneficial relationships and resources tied to economic and environmental efforts throughout the region.

The Appalachian Partnership for Economic Growth (APEG) is a subsidiary of the Ohio Appalachian Business Council, and is committed to accelerating sustainable business growth, catalyzing job creation and advancing the economy of Southeast Ohio. APEG also seeks to retain existing jobs and spur investment in the region.

Next steps: Share this at the end of the survey, or if they ask at any point

A summary of the findings will be created along with a basic map and database identifying the businesses in the region. All participating businesses will receive a copy of this information.

We really appreciate your time today. Thank you.