WHEN IT COMES TO SUCCESS

ARIZONA
IS ALL BUSINESS.

ARIZONA KNOW HOW. JOIN US.
• Client Activity: Q4 results, pipeline
• Manufacturing Extension Partnership (MEP)
• “Arizona Know How” Branding Campaign
• Advancing Innovation
• FY2013 year-end results
FY2013 Q4 Client Activity

28 projects: attraction, expansion, creation

• 5,604 jobs announced
• Average wages $47,289
• $501.8 million capital investment
FY2013 Q4 Client Activity

Continental Residential Investments

Arizona B&GC Solar Holdings

Northern Arizona Healthcare
### Pipeline Projects

- **403 Projects**
- **58,719 jobs**
- **$8.97 B in CapEx**

### Industry Segments

<table>
<thead>
<tr>
<th>Industry Segment</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturing</td>
<td>21%</td>
</tr>
<tr>
<td>Information Technology</td>
<td>14%</td>
</tr>
<tr>
<td>Aerospace &amp; Defense</td>
<td>11%</td>
</tr>
<tr>
<td>Renewable Energy</td>
<td>8%</td>
</tr>
<tr>
<td>Consumer Products &amp; Services</td>
<td>6%</td>
</tr>
<tr>
<td>Health Care</td>
<td>6%</td>
</tr>
<tr>
<td>Banking, Finance &amp; Insurance</td>
<td>5%</td>
</tr>
<tr>
<td>Business Support Services</td>
<td>5%</td>
</tr>
<tr>
<td>Bioscience &amp; Biotechnology</td>
<td>4%</td>
</tr>
<tr>
<td>Mining, Quarrying, Oil &amp; Gas</td>
<td>2%</td>
</tr>
</tbody>
</table>

### Business Attraction Pipeline Origin

- **California** 33%
- **Midwest** 20%
- **Southwest** 12%
- **Northeast** 13%
- **Canada** 9%
- **Europe** 5%
- **Other** 6%
- **Northwest** 1%
- **Southeast** 1%

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ARIZONA KNOW HOW. JOIN US.
Foundational Initiatives

Supporting long-term statewide economic development:

- Manufacturing Extension Partnership (MEP)
- Marketing Arizona’s value proposition
- Advancing innovation
ACA awarded a $5 million grant ($1 million per year for 5 years) to launch Arizona's new Manufacturing Extension Partnership (MEP) program.

MEP Center to serve as a catalyst for strengthening manufacturing in Arizona, accelerating manufacturing’s ongoing transformation into a more efficient and powerful engine of innovation.
ACA executed an aggressive, multi-media branding campaign showcasing “Arizona Know How,” targeting business decision makers around the country.
Inaugural Innovation Arizona Summit 2013:

- Partnership with MIT Enterprise Forum
- 700+ innovators and entrepreneurs
- One-day event included a variety of breakout sessions, networking opportunities and an exhibition
Advancing Innovation
104 projects: attraction, expansion, creation

- 15,262 jobs announced
- Average wages $53,083
- $1.253 billion capital investment
Five-Year Economic Impact of FY2013 Results

32,261 direct, indirect & induced jobs
(total includes 4,747 temporary construction jobs)

$15.73 billion economic impact

$366.1 million tax revenue
($221.9 million state tax revenue)