

Petroleum Products Manufacturing

The petroleum and coal products industry (NAICS 324) focuses on establishments that process crude oil or coal into usable products. The main activity in this industry is petroleum refining, which involves separation techniques such as fractionation, distillation, and cracking. This sector also includes establishments that manufacture asphalt or petroleum-based lubricating oils.



Texas Industry Totals

Firms	182
Employment	24,938
Average Annual Wage	\$109,356
Total Capital Investments	\$2.6 billion
Value Added Per Employee	\$1.9 million
Value of Shipments	\$241 billion

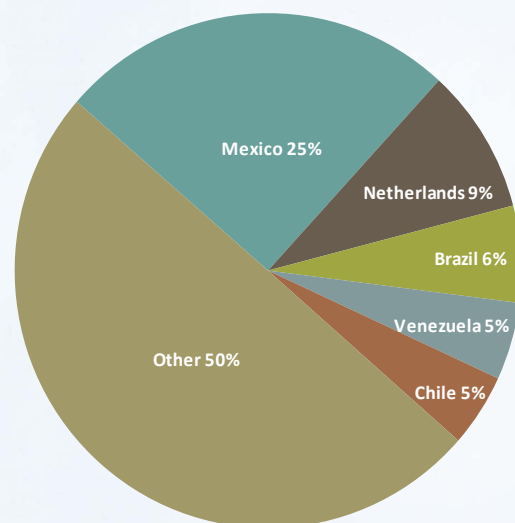
How Texas Ranks in the U.S.

All Employees	No. 1
Production Workers	No. 1
Value Added	No. 1
Value of Shipments	No. 1
Total Capital Investments	No. 1

Texas Exports

- Texas petroleum products exports in 2012 were valued at \$56.9 billion – up 10.0% from \$51.7 billion in 2011.
- In 2011, petroleum production was Texas' largest export sector.
- Top petroleum commodities shipped from Texas ports include refined oils, propane, and natural gas.

Top Export Markets



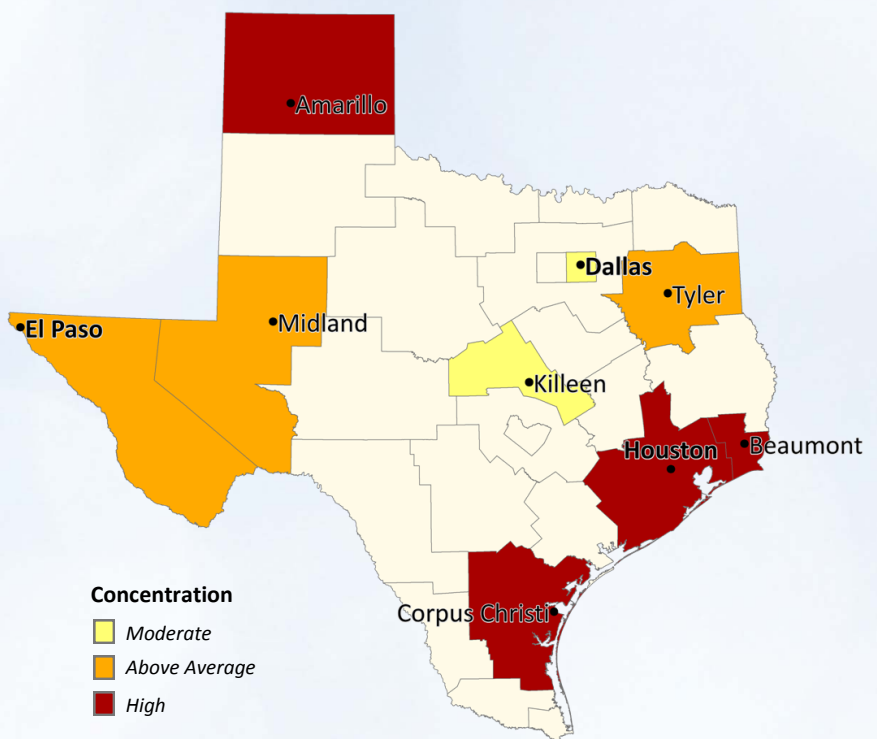
Sources: Texas Workforce Commission, U.S. Census Annual Survey of Manufactures, WISERTrade, Texas Manufacturers Register

Major Industry Employers in Texas

Company	Location(s)	Products
Valero Energy Corp.	San Antonio, etc.	Petroleum refining
Phillips 66	Sweeny, Borger	Petroleum refining
ExxonMobil	Baytown, Beaumont	Petroleum refining
Motiva Enterprises	Port Arthur	Petroleum refining
CITGO Petroleum Corp.	Corpus Christi, etc.	Petroleum refining

Regional Concentrations

The map at right identifies the state's Workforce Development regions with above-average specializations in petroleum and coal product manufacturing. The highlighted regions are not the only areas in Texas where workers in this sector can be found, but rather represent areas with the greatest concentrations relative to the size of the local labor force. This industry is concentrated along the Gulf Coast and elsewhere across the state.



Recent Industry Trends

- Texas petroleum products industry wages increased by 16.1% between Q4 2011 and Q4 2012.
- In 2012, Houston-based Motiva Enterprises doubled its capacity at its Port Arthur refinery to 600,000 barrels per day. The \$10 billion expansion makes the Port Arthur refinery the largest in the United States.
- In 2012, Texas gained a new Fortune 500 company when Houston-based ConocoPhillips spun off its refinery operations into the newly formed company Phillips 66. ConocoPhillips now focuses on oil exploration & production.