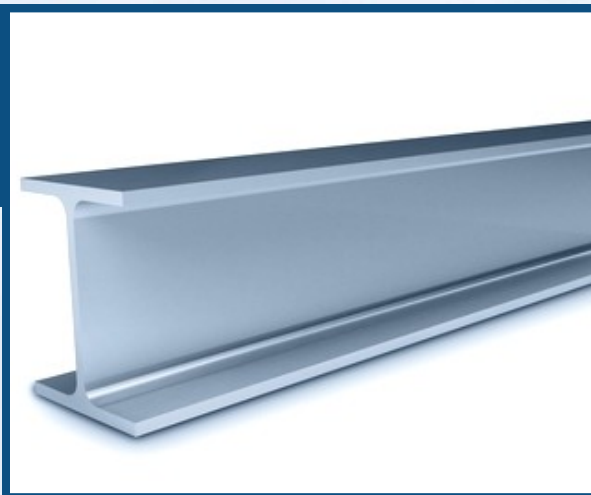


Primary Metals Manufacturing

The primary metals manufacturing industry (NAICS 331) comprises establishments involved in transforming iron ore into basic metal products using metallurgical techniques. Establishments in this industry include iron & steel mills, smelters, and foundries. End products include metal pipes, tubes, sheets, wires, billets, and castings made of iron, steel, copper, aluminum, other metals, and alloys of various metals.



Texas Industry Totals

Firms	379
Employment	22,633
Average Annual Wage	\$55,224
Total Capital Investments	\$349 million
Value Added Per Employee	\$263,498
Value of Shipments	\$17.9 billion

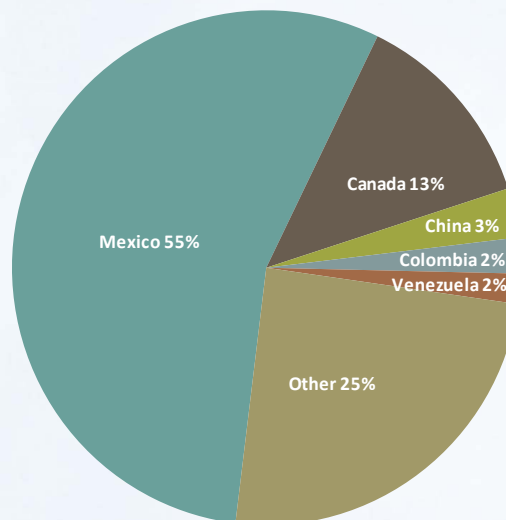
How Texas Ranks in the U.S.

All Employees	No. 6
Production Workers	No. 6
Value Added	No. 5
Value of Shipments	No. 4
Total Capital Investments	No. 7

Texas Exports

- Texas primary metals exports in 2012 were valued at \$7.9 billion – up 3.2% from \$7.7 billion in 2011.
- In 2012, primary metals was Texas' 10th largest export sector.
- Top metal commodities shipped from Texas ports include aluminum and flat-rolled iron & steel.

Top Export Markets



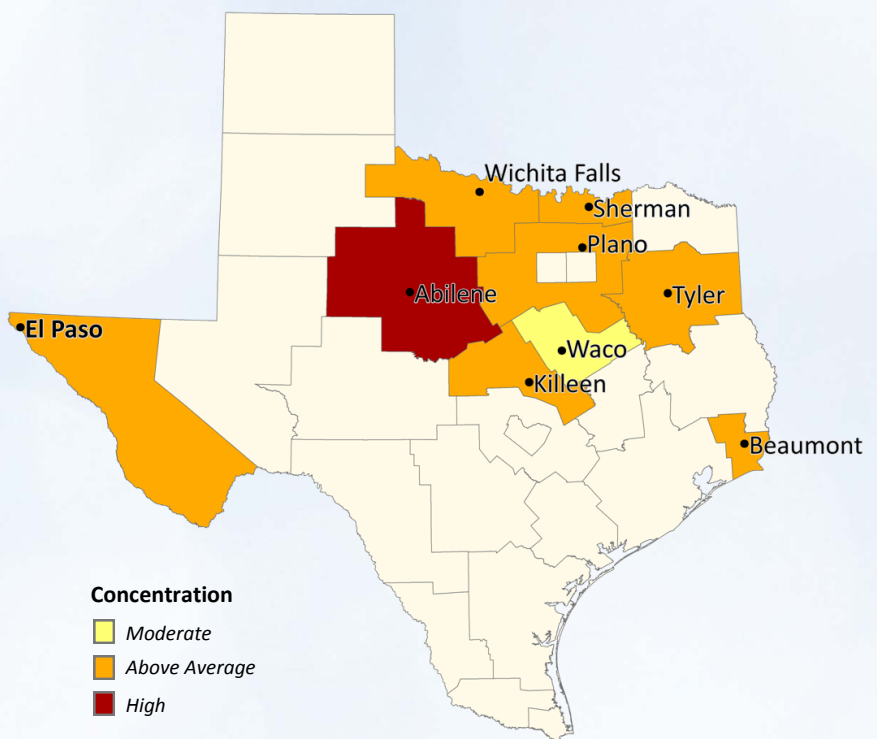
Sources: Texas Workforce Commission, U.S. Census Annual Survey of Manufactures, WISERTrade, Texas Manufacturers Register

Major Industry Employers in Texas

Company	Location(s)	Products
Commercial Metals Co. (CMC)	Seguin, etc.	Reinforced steel, rebar, billets, metal recycling
Nucor Corp.	Jewett, Grapeland	Steel bars, beams, & other building components
U.S. Steel Tubular Products	Houston, Bellville	Steel pipe & tubes
Alcoa	Point Comfort, etc.	Alumina processing, aluminum smelting
Sherwin Alumina	Gregory	Alumina processing

Regional Concentrations

The map at right identifies the state's Workforce Development regions with above-average specializations in primary metals 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 primarily concentrated across North Texas.



Recent Industry Trends

- Texas primary metals industry employment increased by 2.5% between Q4 2011 and Q4 2012.
- In 2012, Tenaris announced plans to build a \$1.5 billion steel pipe manufacturing facility in Bay City, Texas. Once complete, the company is expected to employ 600 workers in Bay City.
- In 2013, Austria-based Voestalpine announced it would build a \$716 million iron ore processing plant in Corpus Christi, Texas. Once operational, the plant will create 150 new jobs.