



THE TEXAS INDEPENDENT PRODUCERS AND ROYALTY OWNERS ASSOCIATION

STATE OF ENERGY REPORT SERIES

OIL & NATURAL GAS EMPLOYMENT AND ESTABLISHMENTS REPORT
FOR Q1 2014

ABOUT TIPRO

The Texas Independent Producers & Royalty Owners Association (TIPRO) is a trade association representing the interests of over 2,800 independent oil and natural gas producers and royalty owners throughout Texas. As one of the nation's largest statewide associations representing both independent producers and royalty owners, members include small businesses, the largest, publicly-traded independent producers, and mineral owners, estates, and trusts. Members of TIPRO are responsible for producing more than 85 percent of the natural gas and 70 percent of the oil within Texas, and own mineral interests in millions of acres across the state.



Texas Independent Producers & Royalty Owners Association
919 Congress Avenue, Suite 1000, Austin, Texas 78701
Phone: (512) 477-4452, Fax: (512) 476-8070
www.tipro.org

INTRODUCTION

As a supplement to the recently published 2013 “State of Energy Report,” TIPRO is pleased to release employment and establishment data for the U.S. oil and gas industry from the first quarter of 2014, the most current data available at the time of publishing this report. A full State of Energy Report for 2014 will be compiled upon the release of updated U.S. census data and will include additional economic data tracked by TIPRO, including wages, payroll, and oil and natural gas production figures.

Key State and National Findings:

- The U.S. oil and gas industry added 12,400 jobs in the first quarter of 2014, for a total of 1,025,200.
- The U.S. oil and gas industry added 640 new businesses in the first quarter of 2014, for a total of 42,700.
- Texas added 2,400 new jobs in the first quarter, the largest increase in the country, for a total of 414,000 jobs.
- Colorado added the 2nd highest number of jobs at 2,200, followed by North Dakota at 1,900.
- Texas added 218 new oil and gas businesses in the state, the largest increase in the country. Total oil and gas related businesses in the state equal 12,500.
- California added the 2nd highest number of new businesses, followed by New Mexico, then Louisiana.



Detailed statistics for national and state oil and natural gas employment and establishment data can be found in the following appendices.

All 2014 Q1 data is preliminary. The full State of Energy Report for 2014 data will be available next year and will include all economic data tracked by TIPRO, including wages, payroll, and oil and natural gas production figures.

OIL & GAS EMPLOYMENT BY STATE

2013-2014(Q1)

	<u>2013</u>	<u>2014-Q1</u>	<u>Percent Change</u> <u>'13-'14</u>	<u>Numeric Change</u> <u>'13-'14</u>
Alabama	5,336	5,170	-3.1%	-166
Alaska	14,562	14,708	1.0%	146
Arizona	1,973	2,062	4.5%	89
Arkansas	9,528	9,199	-3.5%	-329
California	46,360	46,016	-0.7%	-344
Colorado	28,214	30,421	7.8%	2,207
Connecticut	1,774	1,762	-0.7%	-12
Delaware	281	291	3.7%	10
District Of Columbia	N/A	N/A	N/A	N/A
Florida	5,608	5,678	1.3%	70
Georgia	4,621	4,499	-2.6%	-122
Hawaii	565	622	10.1%	57
Idaho	828	858	3.6%	30
Illinois	14,403	14,284	-0.8%	-119
Indiana	5,225	5,212	-0.2%	-13
Iowa	2,213	2,204	-0.4%	-9
Kansas	14,608	14,619	0.1%	11
Kentucky	5,881	5,808	-1.2%	-73
Louisiana	79,566	79,634	0.1%	68
Maine	643	683	6.2%	40
Maryland	2,062	2,172	5.3%	110
Massachusetts	4,356	4,207	-3.4%	-149
Michigan	9,239	9,244	0.1%	5
Minnesota	5,429	5,593	3.0%	164
Mississippi	8,132	8,057	-0.9%	-75
Missouri	4,931	4,912	-0.4%	-19
Montana	6,162	5,839	-5.2%	-323
Nebraska	2,119	2,155	1.7%	36
Nevada	522	525	0.5%	3
New Hampshire	655	650	-0.8%	-5
New Jersey	8,390	8,440	0.6%	50
New Mexico	22,222	23,396	5.3%	1,174
New York	10,059	10,387	3.3%	328
North Carolina	5,426	5,331	-1.8%	-95
North Dakota	21,413	23,288	8.8%	1,875
Ohio	16,566	17,670	6.7%	1,104
Oklahoma	78,012	78,834	1.1%	822
Oregon	1,042	1,026	-1.5%	-16
Pennsylvania	34,308	34,698	1.1%	390
Puerto Rico	798	840	5.3%	42
Rhode Island	N/A	N/A	N/A	N/A
South Carolina	1,526	1,561	2.3%	35
South Dakota	1,291	1,248	-3.3%	-43
Tennessee	2,805	2,896	3.2%	91
Texas	411,580	414,007	0.6%	2,427
Utah	9,495	9,716	2.3%	221
Vermont	275	277	0.8%	2
Virginia	4,551	4,589	0.8%	38
Washington	4,950	4,940	-0.2%	-10
West Virginia	10,119	10,415	2.9%	296
Wisconsin	2,661	2,610	-1.9%	-51
Wyoming	19,155	19,584	2.2%	429

Data was rounded for ease of use. More detailed data was used to reach all numeric and percentage changes. Using the rounded data on this page could result in different numeric and percentage numbers.

OIL & GAS ESTABLISHMENTS BY STATE

2013-2014(Q1)

	<u>2013</u>	<u>2014-Q1</u>	<u>Percent Change</u> <u>'13-'14</u>	<u>Numeric Change</u> <u>'13-'14</u>
Alabama	430	421	-2.1%	-9
Alaska	189	188	-0.5%	-1
Arizona	184	191	3.8%	7
Arkansas	655	653	-0.3%	-2
California	1,532	1,628	6.3%	96
Colorado	1,659	1,646	-0.8%	-13
Connecticut	104	97	-6.7%	-7
Delaware	35	37	5.7%	2
District Of Columbia	8	7	-12.5%	-1
Florida	667	680	1.9%	13
Georgia	379	380	0.3%	1
Hawaii	54	55	1.9%	1
Idaho	120	120	0.0%	0
Illinois	908	922	1.5%	14
Indiana	398	397	-0.3%	-1
Iowa	246	246	0.0%	0
Kansas	1,286	1,320	2.6%	34
Kentucky	555	554	-0.2%	-1
Louisiana	2,712	2,760	1.8%	48
Maine	55	52	-5.5%	-3
Maryland	167	165	-1.2%	-2
Massachusetts	167	165	-1.2%	-2
Michigan	628	637	1.4%	9
Minnesota	332	320	-3.6%	-12
Mississippi	766	775	1.2%	9
Missouri	439	431	-1.8%	-8
Montana	555	579	4.3%	24
Nebraska	278	289	4.0%	11
Nevada	107	101	-5.6%	-6
New Hampshire	41	41	0.0%	0
New Jersey	329	322	-2.1%	-7
New Mexico	1,157	1,242	7.3%	85
New York	524	510	-2.7%	-14
North Carolina	372	362	-2.7%	-10
North Dakota	955	995	4.2%	40
Ohio	1,120	1,148	2.5%	28
Oklahoma	4,162	4,202	1.0%	40
Oregon	131	129	-1.5%	-2
Pennsylvania	1,464	1,498	2.3%	34
Puerto Rico	72	73	1.4%	1
Rhode Island	31	33	6.5%	2
South Carolina	196	187	-4.6%	-9
South Dakota	140	132	-5.7%	-8
Tennessee	293	300	2.4%	7
Texas	12,250	12,468	1.8%	218
Utah	638	642	0.6%	4
Vermont	20	20	0.0%	0
Virgin Islands	10	9	-10.0%	-1
Virginia	322	327	1.6%	5
Washington	206	211	2.4%	5
West Virginia	772	764	-1.0%	-8
Wisconsin	213	205	-3.8%	-8
Wyoming	1,153	1,152	-0.1%	-1

Data was rounded for ease of use. More detailed data was used to reach all numeric and percentage changes. Using the rounded data on this page could result in different numeric and percentage numbers.

U.S. OIL & GAS EMPLOYMENT

2013-2014(Q1)

	<u>2013</u>	<u>2014-Q1</u>	<u>Percent Change</u> <u>'13-'14</u>	<u>Numeric Change</u> <u>'13-'14</u>
Crude Petroleum & Natural Gas Extraction	189,714	185,640	-2.1%	-4,074
Natural Gas Liquid Extraction	6,928	7,198	3.9%	270
Drilling Oil & Gas Wells	93,230	94,499	1.4%	1,269
Support Activities, Oil and Gas Operations	296,846	310,670	4.7%	13,824
National Gas Distribution	109,908	110,569	0.6%	661
Petroleum Refineries	71,792	68,417	-4.7%	-3,375
Petrochemical Manufacturing	24,116	24,281	0.7%	165
Oil and Gas Field Machinery and Equipment	81,246	81,462	0.3%	216
Petroleum Merchant Wholesalers	95,279	96,657	1.4%	1,378
Pipeline Transportation	43,704	45,789	4.8%	2,085
<i>Total</i>	<i>1,012,763</i>	<i>1,025,181</i>	<i>1.2%</i>	<i>12,418</i>

U.S. OIL & GAS ESTABLISHMENTS

2013-2014(Q1)

	<u>2013</u>	<u>2014-Q1</u>	<u>Percent Change</u> <u>'13-'14</u>	<u>Numeric Change</u> <u>'13-'14</u>
Crude Petroleum & Natural Gas Extraction	9,479	9,527	0.5%	48
Natural Gas Liquid Extraction	293	305	4.1%	12
Drilling Oil & Gas Wells	2,575	2,570	-0.2%	-5
Support Activities, Oil and Gas Operations	13,991	14,653	4.7%	662
National Gas Distribution	2,954	2,903	-1.7%	-51
Petroleum Refineries	761	712	-6.4%	-49
Petrochemical Manufacturing	161	157	-2.5%	-4
Oil and Gas Field Machinery and Equipment	1,321	1,348	2.0%	27
Petroleum Merchant Wholesalers	7,831	7,837	0.1%	6
Pipeline Transportation	2,702	2,694	-0.3%	-8
<i>Total</i>	<i>42,069</i>	<i>42,706</i>	<i>1.5%</i>	<i>637</i>

Data was rounded for ease of use. More detailed data was used to reach all numeric and percentage changes.

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Source: U.S. Bureau of Labor Statistics

All data for the first quarter of 2014 is preliminary.

METHODOLOGY

All data is derived from the U.S. Bureau of Labor Statistic's QCEW (Quarterly Census of Employment and Wages) Series. The data from this source provides the most comprehensive source of industry data at the state level and allows for a true state-by-state comparison using the same data source. This series collects data from the state unemployment reports and as a result supplies a census of employment and establishments information. Establishments are single economic units, usually a single location. Companies often have multiple establishments at multiple locations. The term 'businesses' may be used to refer to an establishment to facilitate ease of use and understanding.

2014 data is for the first quarter of the year. As such, the 2014 data does not represent the complete year of 2014, and will tend to undercount sectors that are growing when compared with the full year of 2014.

DEFINITION OF THE OIL AND GAS INDUSTRY:

NAICS CODES-	SECTOR-
211111	Crude Petroleum & Natural Gas Extraction
211112	Natural Gas Liquid Extraction
213111	Drilling Oil & Gas Wells
213112	Support Activities, Oil and Gas Operations
2212	Natural Gas Distribution
32411	Petroleum Refineries
32511	Petrochemical Manufacturing
333132	Oil and Gas Field Machinery and Equipment
4247	Petroleum Merchant Wholesalers
486	Pipeline Transportation

