

Petroleum Refining & Products

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	192
Employment	24,638
Average Annual Wage	\$105,716
Total Capital Investments	\$3.3 billion
Value Added Per Employee	\$1.2 million
Value of Shipments	\$178 billion

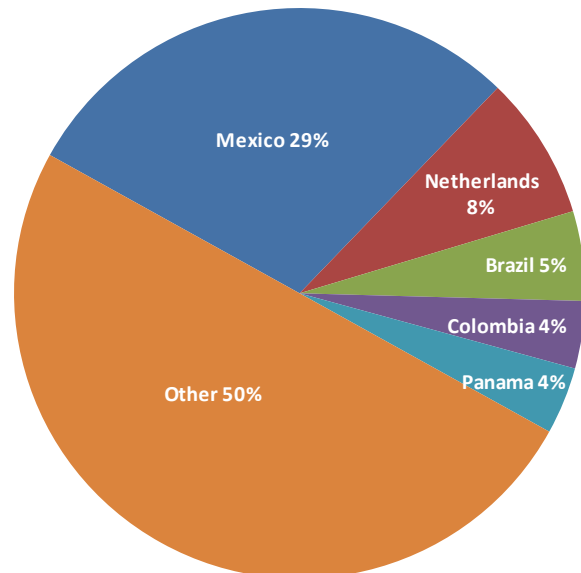
How Texas Ranks in the U.S.

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 2011 were valued at \$51.3 billion – up from \$33.1 billion in 2010.
- In 2011, petroleum production was Texas' largest export sector.

Top Export Markets



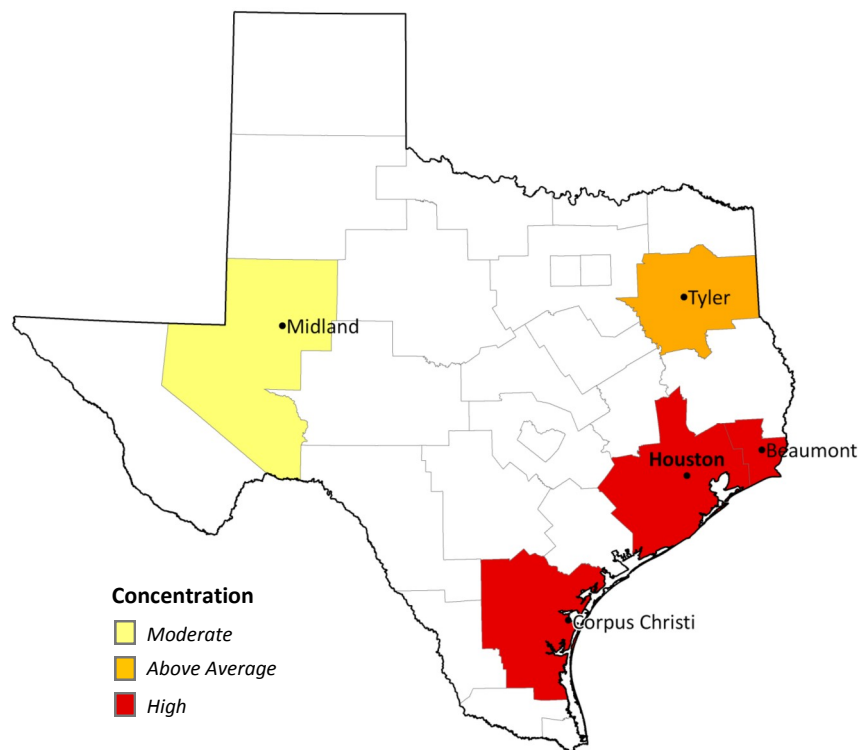
Sources: Texas Workforce Commission, U.S. Census Annual Survey of Manufactures, WISERTrade, Texas Manufacturers Register

Major Industry Employers in Texas

Company	Location(s)	Products
Valero Energy Corp.	San Antonio, etc.	Petroleum refining
ConocoPhillips	Sweeny, Borger	Petroleum refining
Exxon Mobil Refining & Supply Co.	Baytown, Beaumont	Petroleum refining
LyondellBasell Industries	Houston	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 mostly focused in high concentrations along the Gulf Coast.



Recent Industry Trends

- Texas petroleum products industry employment increased by 1.7% and wages increased by 6.6% between Q3 2010 and Q3 2011.
- In 2012, Houston-based Motiva Enterprises LLC is expected to finish major expansions at its Port Arthur refinery. Capacity will double to 600,000 barrels per day, making it the largest refinery in the country.
- San Antonio-based Valero Energy Corporation also expects to complete its Port Arthur refinery expansion project in 2012, bringing \$1.5 billion in investment to the region.