

# Oil and Natural Gas Stimulate Missouri

## Economic and Job Growth



Oil and natural gas are driving the U.S. economy through a major energy boom and that boom is rippling through the economy of Missouri, supporting business activity across the state. This finding grows out of a new American Petroleum Institute survey of domestic oil and natural gas vendors,<sup>1</sup> which offers a glimpse into the job and business creation engine that is the current oil and natural gas industry. The survey shows that at least 189 businesses, spread across all eight of Missouri's congressional districts, are part of the larger oil and natural gas supply chain.

The survey's snapshot of state-by-state activity reinforces the impressive level of industry success throughout the country that is documented in a recent PriceWaterhouseCoopers study conducted for the American Petroleum Institute.<sup>2</sup> That study found that the oil and natural gas industry in Missouri supports some 118,800 jobs, which is 3.4 percent of the state's total employment. The amount of Missouri labor income supported by the oil and natural gas industry comes to \$5.53 billion annually. That's 3.3 percent of the state's total labor income.

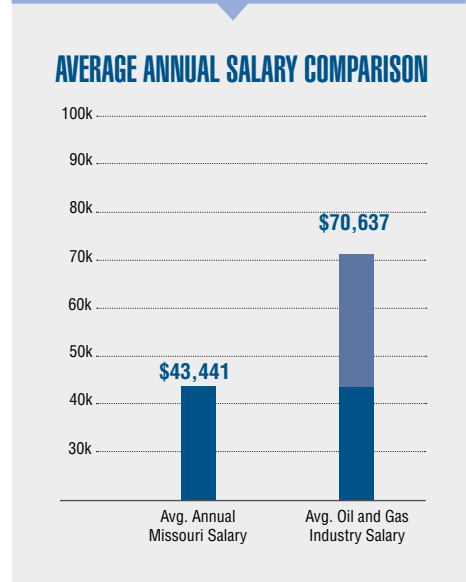
Although Missouri is not a top U.S. energy producer, these job and labor income figures demonstrate that the people of Missouri enjoy significant benefits from

energy development.<sup>3</sup> The benefits show up in the state's salary statistics as well. Thus, while the average annual salary in Missouri across all industries and sectors is \$43,441, the average oil and gas industry salary (excluding gas stations) is substantially higher—\$70,637 annually. Overall the industry supports \$9.8 billion of the Missouri economy. That's 3.8 percent of the state's total economic activity.

Missouri also benefits from the production of oil and natural gas from shales and so-called "tight formations," energy development that uses the proven engineering technologies of hydraulic fracturing, or "fracking," and horizontal drilling. Total jobs supported by these activities in Missouri reached 37,716 in

**\$9.8 BILLION**  
THE INDUSTRY CONTRIBUTES TO MISSOURI'S ECONOMY

**118,800**  
MISSOURI JOBS  
SUPPORTED BY OIL AND NATURAL GAS INDUSTRY



1. American Petroleum Institute, "API Onshore Oil and Gas Vendor Identification Survey," distributed to API members in January 2014 to collect information for the period October 2012 to September 2013. The survey identifies companies that provide goods and services for onshore oil and natural gas development, whether as operators, contractors, service companies, suppliers, or vendors.  
 2. PriceWaterhouseCoopers, "Economic Impacts of the Oil and Natural Gas Industry on the U.S. Economy in 2011," July 2013, prepared for API using the IMPLAN input-output modeling system, based on 2011 U.S. Bureau of Economic Analysis data.  
 3. Information cited in this paragraph comes from the Bureau of Labor Statistics, Quarterly Census of Employment and Wages (preliminary data for 2013 accessed July 2014); and PriceWaterhouseCoopers, "The Economic Impacts of the Oil and Natural Gas Industry on the U.S. Economy: Employment, Labor Income and Value Added," 7/12/13 (based on 2012 IMPLAN database).

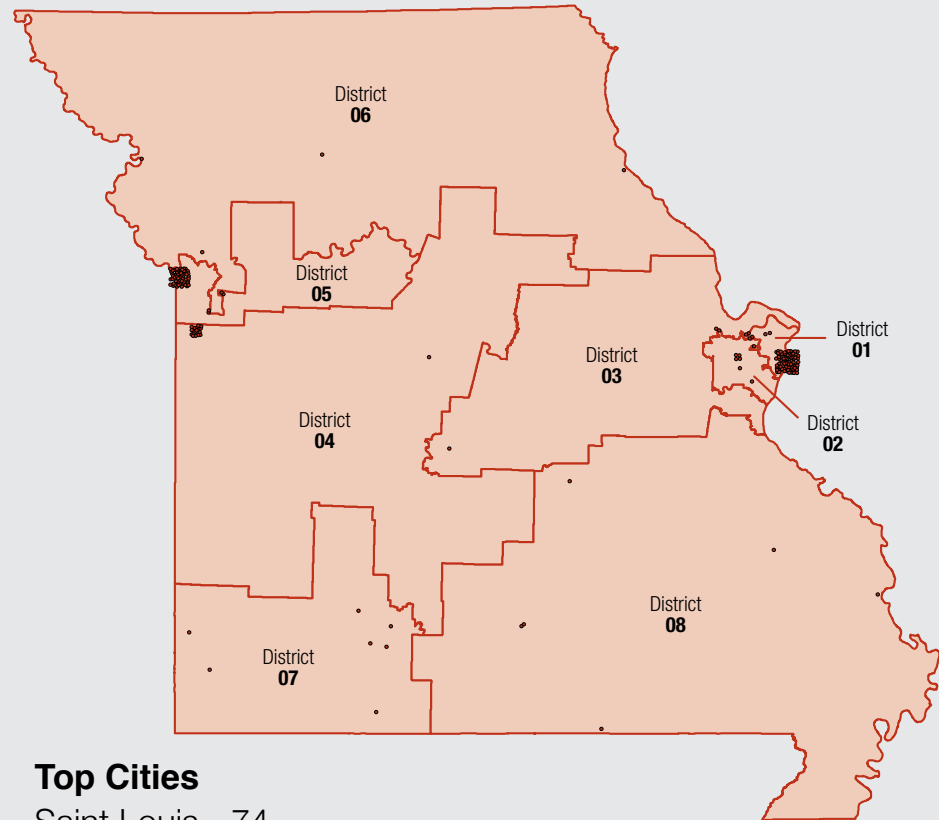
## State: Missouri

### Vendors by Congressional District

Congressional District	Total
Congressional District 1	82
Congressional District 2	6
Congressional District 3	5
Congressional District 4	19
Congressional District 5	60
Congressional District 6	4
Congressional District 7	7
Congressional District 8	6
<b>Grand Total</b>	<b>189</b>

## Missouri Vendors by Congressional District

District Location ●



### Top Cities

Saint Louis = 74

Kansas City = 56

Sources: Esri, DeLorme, NAVTEQ, TomTom, Intermap, increment P Corp., GEBCO, USGS, FAO, NPS, NRCAN, GeoBase, IGN, Kadaster NL, Ordnance Survey, Esri Japan, METI, Esri China (Hong Kong), and the GIS User Community

2012. The job total is projected to climb to 64,228 in 2020 and to 70,794 in 2035.<sup>4</sup>

And Americans, including the people of Missouri, get it. A statewide telephone poll of 614 Missouri registered voters,

conducted on behalf of the American Petroleum Institute, found that 81 percent of them, regardless of party affiliation, support increased production of oil and natural gas resources located in the United States.<sup>5</sup>

4. IHS Inc., "America's New Energy Future: The Unconventional Oil and Gas Revolution and the U.S. Economy," Washington, D.C., December 2012.
5. "What America is Thinking on Energy Issues" <http://www.api.org/news-and-media/news/newsitems/2014/aug-2014/poll-large-majorities-of-missouri-voters-support-increased-investments-in-us-energy-infrastructure> the results of a Missouri poll conducted by Harris for API July 29-August 3, 2014. Click on "new poll" to see how percentages of voters answered this and other questions.



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**Congressional District 1**

A Box 4 U  
 American Railcar Leasing, LLC  
 Andria M. Wallace  
 Aramark Uniform Services  
 Ark Land Company  
 Ash Grove Cement Company  
 Atlas Van Lines, Inc  
 Atmos Energy  
 Atmos Energy Corporation  
 Automation Service  
 BHS Marketing, LLC  
 Carboline Company  
 Central Parking Corporation  
 Central Parking System  
 CMS Communications, Inc  
 Consolidated Communications  
 Continental Disc Corporation  
 Continental Fabricators, Inc  
 Continental Resources, Inc  
 Corporate Express  
 Corporate Payment Systems  
 Digital Partners, Inc  
 DS Waters of America, Inc  
 EBC Industries  
 Emerson Process Management  
 Llp  
 Enterprise Rent-A-Car Company  
 Environ International Corporation  
 Experitec, Inc  
 Faithful Gould, Inc  
 Federal Communications  
 Commission  
 Ferry Cap & Setscrew Co  
 Fleishman Hillard, Inc  
 Gardner Denver Machinery  
 Graybar Electric Company, Inc  
 Hartwig, Inc  
 Heat Transfer Systems, Inc  
 Husch Blackwell LLP  
 IBT, Inc  
 Intoximeters  
 Jacobs Engineering Group  
 King Filtration Technologies, Inc  
 Kloxure Dynamic Seals

Labarge / Stc, Inc  
 Lamot  
 Legacy Reserves Operating LP  
 Luby Equipment Services  
 Materials Technology Institute  
 MC Industrial, Inc  
 Minding Moments, LLC  
 Motion Industries, Inc  
 Netelligent Corporation  
 OBcorporation, LLC  
 Oklahoma Safety Equipment  
 Co, Inc  
 Ontracks Enterprises, Inc  
 Paul Mueller Co  
 Petro Amigos Supply, Inc  
 Petro Amigos Supply, Inc  
 Process Controls International,  
 Inc  
 Production Castings, Inc  
 Schneider Logistics, Inc  
 Sigma Aldrich, Inc  
 Solutia, Inc  
 Southwest Steel Casting  
 St. Louis Metallizing Company  
 Staffmark  
 Staffmark  
 Stan Gellman Graphic Design  
 Standard Coffee Service  
 Staples Promotional Products  
 Stemmerich, Inc  
 Tech Electronics, Inc  
 Thermadyne Industries  
 THF Firestone Development,  
 LLC  
 Toshiba Financial Services  
 Tubular Steel, Inc  
 Tueth Keeney Cooper Mohan  
 and  
 U.S. BanCorporation Equipment  
 Finance, Inc  
 United Pipeline Systems, Inc  
 Walmart Stores, Inc  
 William Tao & Assoc, Inc  
 Windstream Communications  
 World Wide Technology, Inc  
 WS Atkins, Inc

Yellowstone Valley Railroad, LLC

**Congressional District 2**

American Piping Products, Inc  
 Environmental Restoration, LLC  
 Experitec, Inc  
 Hydrocat Industries  
 Preston Publishing Company  
 Rose International

**Congressional District 3**

Chemtron Supply Corporation  
 Citibank Na  
 Micrologic  
 Trinity Products, Inc  
 UIU, LLC

**Congressional District 4**

Abbie J. Burton Trust  
 Cabell Gillespie Rev Trust  
 Claudia Kenyon Floyd Trust  
 Community Bank of Raymore As  
 Ttee Laura E Couch Under Trust  
 Danah H. Fayman Trust  
 David L. Fayman Revocable  
 Trust  
 Deborah B. Miller Trust  
 Faith Fayman Strong Revocable  
 Trust  
 Great Western Dining Service,  
 Inc  
 Harry T. Abernathy Trust  
 Keri Cowart Trust Fbo Keri  
 Gillespie  
 Kern E. Kenyon Trust  
 Laura E. Couch Trust  
 Milus D. Scruggs Trust  
 Robert J. Bandom Trust  
 Thomas Mitchell Scruggs Jr  
 Trust  
 Timothy S. Bandom Trust  
 W.D. Johnson Jr Trust  
 William S. Bandom Jr Trust

**Congressional District 5**

Access Advertising, LLC  
 Alexander Open Systems, Inc  
 Assurant  
 Baldor Electric Company  
 Belger Cartage Service, Inc  
 Burns & Mcdonnell Engineering  
 Co, Inc  
 Casema, Inc  
 Certified Safety Manufacturing  
 Checkered Flag Trucking, LLC  
 Clifford Power Systems, Inc  
 Computer Engineering, Inc  
 Cooling & Herbers P C  
 Enterprise Fleet Management,  
 Inc  
 Examinetics, Inc  
 Express Hotshot, LLC  
 Fairbanks Service  
 Fast Freddys Hot Shot, LLC  
 Fike Corporation  
 Forbush Linda Lea  
 Frontier Services, Inc  
 Geotechnical Engineering Group  
 Grainger, Inc  
 Hampel Oil Distributors, Inc  
 Holland 1916  
 Inland Kenworth, Inc  
 Kansas City Southern Railway  
 Co  
 Lathrop & Gage LLP  
 Lindley Transport  
 Lynch Bryan Consulting, LLC  
 M&M Supply Co, LLC  
 Mid States Crane & Hoist, Inc  
 National Assn of Division Order  
 Ana  
 Oil City Hotshot, LLC  
 OK Natural Gas Company  
 Oklahoma Natural Gas  
 Company  
 Penn State Sport Properties  
 Performance Contracting, Inc  
 Pipeline Testng Consortium, Inc  
 Polsinelli Shughart PC  
 R.M. Trucking, LLC

Regal Graphics  
 Rockhurst University Continuing  
 Shook Hardy & Bacon LLP  
 SkillPath Corporate Strategies  
 Sooner Sports Properties, LLC  
 SOR, Inc  
 Sprint  
 Stanion Wholesale Electric Co  
 Stinson Leonard Street LLP  
 Stonebridge Acquisition, Inc  
 Terracon Consultants, Inc  
 Texas Gas Service Company  
 Underwood Hotshot Service  
 University of Wyoming Sports  
 VML, Inc  
 W.W. Grainger, Inc  
 Wachter, Inc  
 Wilco Steel Products  
 Willis Oilfield Trucking, LLC  
 Windstream Communications,  
 Inc

**Congressional District 6**

Barnett Power Line, LLC  
 Continental Disc Corporation  
 Martin Construction, Inc.  
 Mastio & Co, LLC

**Congressional District 7**

Blueascent, LLC  
 Gilbert Industries, Inc  
 Newman Oilfield Consulting  
 Panera Bread Catering  
 Russell S Mcaffrey Gd  
 Construction  
 Sho-Me Fiber  
 Turbo Supply, Inc

**Congressional District 8**

Cape Electrical Supply, LLC  
 Executive Air Care  
 Missouri University of Science  
 Pense Bros Drilling, Inc  
 Transitsecurityreport.com, Inc  
 Upland Services, Inc