

Oil and Natural Gas Stimulate Wisconsin 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 Wisconsin, supporting business activity across the state. This finding grows out of a new American Petroleum Institute survey of domestic oil and natural gas vendors,¹ 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 108 businesses, located across all eight of Wisconsin'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.² That study found that the oil and natural gas industry in Wisconsin supports some 103,300 jobs, which is 3 percent of the state's total employment. The amount of Wisconsin labor income supported by the oil and natural gas industry comes to \$4.5 billion annually. That's 2.9 percent of the state's total labor income.

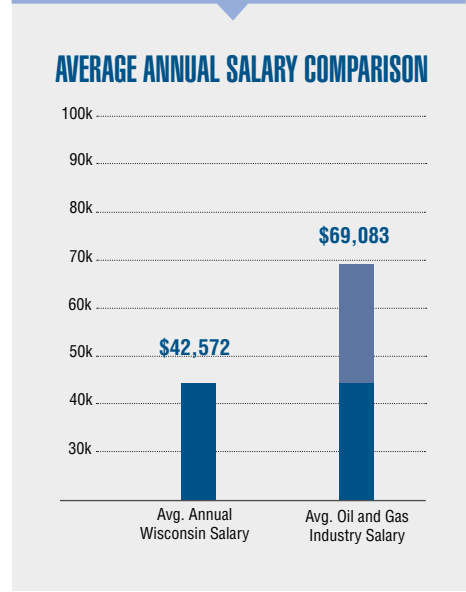
Although Wisconsin is not a top energy producer, these job and labor income figures demonstrate that the people of Wisconsin enjoy significant benefits from

energy development.³ The benefits show up in the state's salary statistics as well. Thus, while the average annual salary in Wisconsin across all industries and sectors is \$42,572, the average oil and gas industry salary (excluding gas stations) is substantially higher—\$69,083 annually.⁴ Overall the industry supports \$7.9 billion of the Wisconsin economy. That's 3.1 percent of the state's total economic activity.

Wisconsin 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

\$7.9 BILLION
THE INDUSTRY CONTRIBUTES TO WISCONSIN'S ECONOMY

103,300
WISCONSIN JOBS
SUPPORTED BY OIL AND NATURAL GAS INDUSTRY



1. American Petroleum Institute, "API Onshore Oil and Gas Vendor Identification Survey," Washington, D.C., 2014. The survey was distributed to API members in January 2014 to collect information for the period October 2012 to September 2013. Included are 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," Washington, D.C., 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).
 4. Data includes NAICS code 324, which may count some coal product manufacturing jobs.

State: Wisconsin

Vendors by Congressional District

Congressional District	Total
Congressional District 1	11
Congressional District 2	12
Congressional District 3	7
Congressional District 4	30
Congressional District 5	19
Congressional District 6	16
Congressional District 7	6
Congressional District 8	7
Grand Total	108

Vendor Profile⁷

Snap-on Industrial

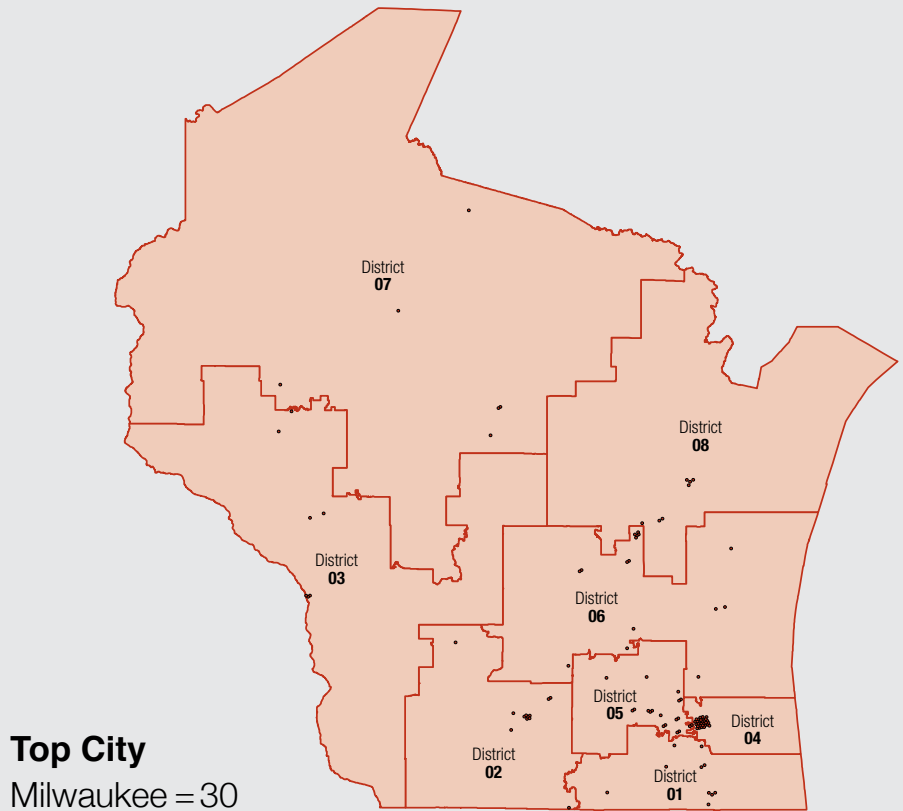
Snap-on is a leading global innovator, manufacturer, and marketer of tools, equipment, diagnostics, repair information, and systems solutions for professional users performing critical tasks. Products and services include hand and power tools, tool storage, diagnostics software, information and management systems, shop equipment, and other solutions for vehicle dealerships and repair centers. Industrial customers include aviation and aerospace, agriculture, construction, government and military, mining, natural resources, power generation, and technical education. Products and services are sold through the company's franchisee, company-direct, distributor, and internet channels. Founded in 1920, Snap-on is a \$3.1 billion, S&P 500 company headquartered in Kenosha, Wisconsin.

Snap-on has served the oil and gas industry for decades. The company provides daily use and special one-of-a-kind tools to refineries and equipment manufacturers. The company has also created and provided task-specific, custom-made tool sets for mobile service trucks and other needs, designed with varying degrees of tool control and asset management.

In addition, Snap-on has created industry-specific safety and training programs.

Wisconsin Vendors by Congressional District

District Location ●



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

activities in Wisconsin reached 19,760 in 2012. The job total is projected to climb to 33,112 in 2020 and to 35,976 in 2035.⁵

And Americans, including the people of Wisconsin, get it. A telephone poll of 1,012 registered voters across the country,

conducted on behalf of the American Petroleum Institute, found that 77 percent of Americans, regardless of party affiliation, support increased production of oil and natural gas resources located in the United States.⁶

5. IHS Inc., "America's New Energy Future: The Unconventional Oil and Gas Revolution and the U.S. Economy," Washington, D.C., December 2012.
6. "What America is Thinking on Energy Issues." <http://www.api.org/news-and-media/news/newsitems/2014/july-2014/voters-say-us-should-do-more-to-develop-oil-natural-gas> the results of a national poll conducted by Harris for API July 10-13, 2014. Click on "national poll" to see how percentages of voters answered this and other questions.



AMERICAN PETROLEUM INSTITUTE

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7. From the 2014 "API Onshore Oil and Gas Vendor Identification Survey" returns.

Congressional District 1

Aw-Lake Company
 Centrisys Corporation
 Cordstrap USA, Inc
 Drewco Corporation
 Elwood Corporation Fluid Power Group
 Midwest Air Parts, Inc
 Midwest Thermal-Vac, Inc
 Protect-All, Inc
 Runzheimer International
 Snap-On, Inc
 Uline, Inc

Congressional District 2

Addison Machine Engineering, Inc
 Bruker Axs, Inc
 Cascade Asset Management, LLC
 Conney Safety Products, LLC
 Fairbanks Morse Engine
 Full Compass Systems Ltd
 Gammex, Inc
 Gordon Flesch Company, Inc
 JT Packard & Associates, Inc
 Palmer Johnson Distributors, LLC

Palmer Johnson Power Systems, LLC
 The Weir Group Plc

Congressional District 3

Atlas Resin Proppants, LLC
 Chart Energy & Chemicals, Inc
 Eileen Cvancara
 Lorman Education Services
 McLoone Metal Graphics
 Preferred Sands of Wisconsin, Ulc
 Trane Company

Congressional District 4

A&A Manufacturing Co, Inc
 Anguil Environmental Systems, Inc
 Benz Oil, Inc
 Brady Corporation Limited
 Charter Communications
 Ellsworth
 Fastrak Softworks, Inc
 Fei Behavioral Health
 Helwig Carbon Products, Inc
 Hy Bon Engineering Co, Inc
 Inspatial

Johnson Controls, Inc
 Manpower Professional Servicesinc
 Marking Services, Inc
 Milwaukee Consulting Group, LLC
 Milwaukee Electronics Corporation
 Milwaukee Forge
 Milwaukee Gear
 National Business Furniture, Inc
 Nova Molecular Technologies, Inc
 PKware, Inc
 Ritus Rubber
 Scot Forge
 Sentry Equipment Corporation
 Stroh Precision Die Casting, LLC
 Tapfin, LLC
 Timothy Kraetsch
 Unit Drop Forgings
 Walker Forge
 WSA Engineered Systems, Inc

Congressional District 5

3M Company
 A&A Manufacturing Co, Inc
 Amalga

American Rotary
 Bound Tree Medical, LLC
 Burrus Research Assoc, Inc
 Element Material Technology
 Expertune, Inc
 FCX Performance, Inc
 Michael & Barbara Kraetsch
 Noble Diagnostics, Inc
 OIP Holdings, LLC
 PBBS Equipment Corporation
 Sentry Equipment Corporation
 Solutions Dynamics, Inc
 The Ohio Bell Telephone Co
 T-Lon Products, Inc
 Trico Corporation
 Unit Drop Forgings

Congressional District 6

Above & Beyond, Incentives
 Azco, Inc
 Badger Mining
 EK Machine Co, Inc
 GE Oil & Gas, Inc
 JJ Keller & Associates, Inc
 Kohler RentalLPower, Inc
 Marvel Manufacturing Company, Inc

Michels Corporation
 Neenah Foundry Company
 Oil Rite Corporation
 Ram Tool
 Red Canoe Promotions, Inc
 Tab Products Co, LLC
 The American Club
 Transload Solutions, LLC

Congressional District 7

Catalytic Combustion Corporation
 Mark Smugala
 Rosemary D. Schroef
 William C. Byram
 Wilson Hurd Manufacturing Co
 Wisconsin Box Company

Congressional District 8

Azco, Inc
 Erin Berns
 Krueger International, Inc
 Machine Service, Inc
 Mid-Valley Industries, LLC
 Schneider Logistics, Inc
 Team Industries, Inc