Oil and natural gas are driving the U.S. economy through a major energy boom and that boom is rippling through the economy of Montana, supporting business activity across the state. This finding grows out of a new American Petroleum Institute survey of domestic oil and natural gas vendors, 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 226 businesses, spread across Montana’s at-large congressional district, 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. That study found that the oil and natural gas industry in Montana supports some 43,100 jobs, which is 6.7 percent of the state’s total employment. The amount of Montana labor income supported by the oil and natural gas industry comes to $2.01 billion annually. That’s 7.7 percent of the state’s total labor income.

Although Montana is not a top U.S. energy producer, these job and labor income figures demonstrate that the people of Montana enjoy significant benefits from energy development. The benefits show up in the state’s salary statistics as well. Thus, while the average annual salary in Montana across all industries and sectors is $36,499, the average oil and gas industry salary (excluding gas stations) is very substantially higher—$81,226 annually. Overall the industry supports $4.5 billion of the Montana economy. That’s 10.8 percent of the state’s total economic activity.

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

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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 in the survey are companies that provide goods and services for onshore oil and natural gas development, whether as operators, contractors, service companies, suppliers, or vendors.


reached 9,634 in 2012. The job total is projected to climb to 16,799 in 2020 and to 18,811 in 2035.4

And Americans, including the people of Montana, 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.5

Montana Vendors by Congressional District

<table>
<thead>
<tr>
<th>Congressional District</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Congressional District (At Large)</td>
<td>226</td>
</tr>
<tr>
<td>Grand Total</td>
<td>226</td>
</tr>
</tbody>
</table>

Top Cities

Billings = 56
Havre = 51

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

Vendor Profile6

Geo-Link, Inc.

Geo-Link, Inc., is a geological consulting company that provides services such as mud logging, geosteering, and wellsite geology to various operators in the oil field and throughout the Rocky Mountain region. Growth in the oil and natural gas industry has enabled the company to continue to hire new employees in and around the region.

The services provided to the oil and natural gas industry include safety services, such as gas detection, and services that help make possible the profitable and timely completion of individual wells.

6. From the 2014 “API Onshore Oil and Gas Vendor Identification Survey” returns.
Montana Vendors by Congressional District

Vendor Survey Findings report

Dicks Heating & Cooling, LLC
Dan’s Auto Parts
Dak Tana Wireline, Inc
D&M Water Service, Inc
D&D Oilfield Service, Inc
Culligan

Chinook Disposal Service, Inc
Checkers, Inc
Central Machine & Welding, Inc
Cayman Holdings, Inc
CAD, Inc
Cal-Kern, LLC.
Cayman Holdings, Inc
Central Machine & Welding, Inc
Checkers, Inc
Chinook Disposal Service, Inc
Combustion Service
Coopers Consulting LLP
Crowley Fleck PLLP
Culligan
D&D Oilfield Service, Inc
D&M Water Service, Inc
Dak Tana Wireline, Inc
Dan’s Auto Parts
Dick Irvin, Inc
Dicks Heating & Cooling, LLC
Doorbust N Portables & Septic
DPHHS Environmental Lab
Drake Water Technologies
DXP Enterprises, Inc
Dyatt Otto
Eagle Leasing, LLC
Empire Steel Manufacturing Co
Energy Equity Co
Energy Job Solutions
Energy Laboratories, Inc
Envirco, Inc
Environmental Materials, Inc
Environmental Solutions Resource, Inc
Excel Drilling, Inc
Executive Lawn Service
Extreme Ice, Inc
Ezzies Wholesale, Inc
Farstad Oil, Inc
Ferguson Enterprises, Inc
Ficker Oil Company, Inc
Finest Boot Repair
Fire Suppression Systems, Inc
Fleet Warehouse Supply
Florens Printing
Flowmark Hightech Co
Franz Construction, Inc
Funcheaser, LLC
G&G Garbage, Inc
Gails Consulting
Garbage, Inc
Gary & Leos Iga
General Distributing Co
Geo-Link, Inc
Georgia Fair Trust
Gerald W Brewer
Glassworks
Giko Aviation, Inc
Gray & Johnson PLLP
Graybar Electric Co, Inc
Great Northern Consulting, LLC
Green River Energy Resources, Inc
Griffith Excavating, Inc
Griggs Printing & Publishing
Glu, LLC
Havre Heating & AC, Inc

Havre Laundry and Dry Cleaning Co
Havre Muffler & Brake
Havre Rental
Highland Projects
Hi-Line Audio & Video
Ho Auto & Paint Havre
Holden’s Hot Wheels, Inc
Hot Plumbing & Heating
Hurley Enterprises, Inc
Industrial Measurement and Control, Inc
Integrated AG Services, Inc
Interstate Industrial Steam
J&A Fencing & Pintlers, Inc
Jane Schultes
Jares Fence Co, Inc
JC Energy, LLC
Jerrys Services of N.Dakota, Inc
Jet Heat Nw, LLC
Josh Elliott Fine Art, LLC
KC Harvey Environmental, LLC
Kenneth D. Tate
Kenneth L. Holmlund
Kirst Engineering Company
Lambert Saltwater Disposal, Inc
Lamp Recyclers of Montana, LLC
Lancasters Pressure Testing
Landtech Enterprises, LLC
Las Vegas, LLC
LCC Properties, LLC
Liquid Gold Well Service, Inc
Loenbro, Inc
Louis Iverson Jr
Master Sports, Inc
Mathews Answering Service, Inc
Max Mart, Inc
Metals Testing Services, Inc
Mid Rivers Telephone Cooperative
Millam Floral
Mills & Garbage Service, Inc
Mitchell’s Oilfield Service, Inc
Mk Weiden Construction, Inc
Montana Seals & Packing
Montana Self Insurers Guaranty Fund
Montana Tech

Mt. Marian Enterprises
Nancy K. Vermeulen
Navigator Direct, Inc
Nemont
NFB Excavation, Inc
Normans Ranch & Sportswear
Norse Well Services, LLC
North Central Auto Parts
Northland Consulting Services
Northwest Industries, Inc
Northwest Pipe Fittings, Inc
Northwest Security Services, LLC
Northwestern Energy
Nuwave Oil Tools, Inc
O’Donnell Pumping
Office Equipment Co
Pacific Steel & Recycling
Pardee Excavating, LLC
Parka, Inc
Patrick Trucking, LLC
Paul Vosters Consulting
Pauper Industries, Inc
Peak Supply Co, LLC
Performance One, LLC
Pete Clausen & Sons, Inc
Peterson Quality Office
Pioneer Technical Services, Inc
Plant Services, Inc
Planteries
Power Service of Montana, Inc
Prairie Fuels
Priority Communications, Inc
Pro Energy, Inc
Pro Pipe Corporation
Probuilt
R&R Welding, LLC
Rainbow Irrigation, Inc
Range Telephone Coop, Inc
Rasmussen Janitorial Service, Inc
Rick Partin Trucking
Rieger Fencing & Contracting, Inc
RM Reps Co
Rockmount Research Alloys In
Safety 1 Enterprises
Scadia West, Inc
Schine Electric
Schoeder Land Co, Inc
Shawn Nystrom
Sherwin-Williams
Sidney Cleaners & Laundry
Sidney Rental
Sign Products, Inc
Smith Equipment Company, Inc
Spencer Fluid Power, Inc
Studyham Computer & Security Li
Sunburst Consulting, Inc
T.P. Construction, Inc
T.W. Enterprises, Inc
Tailwind Transport, Inc
Target Pest Control, Inc
Taylor Aviation, Inc
Terraco Consultants, Inc
The Duck Inn, Inc
Theilen Welding
Thomas E. Ezubay PC
Three Rivers Well Service, Inc
Thunderbird International
Tierman Motor Co
Timothy S Herron
Tire Rama Havre
TNT Diversified, LLC
Top Dog Performance, LLC
Torgerson’s
Triangle Telephone Cooperative
Triple J Dirt Works, LLC
Triple S Disposal, Inc
Triple T Sales
TriState Services, LLC
Truenorth Steel
TW Enterprises, Inc
UELS LLC
Up & Down Welding & Fabrication, LLC
Vac-U-Jet Septic & Sump Service, Inc
Valerie L. Abbott
Valley Motor Supply Carquest
Waggoners Trucking
Watson Trucking
Wild Horse Seeds LLP
Wildcat Trucking, LLC
Wtc, Inc
Wyo-Ben, Inc