

Oil and Natural Gas Stimulate Florida

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 Florida, 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 183 businesses, located across nearly all of Florida's 27 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 Florida supports some 286,800 jobs, which is 2.9 percent of the state's total employment. The amount of Florida labor income supported by the oil and natural gas industry comes to \$12.9 billion annually. That's 2.8 percent of the state's total labor income.

Although Florida is not a top energy producer, these job and labor income figures demonstrate that the people of Florida 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 Florida across all industries and sectors is \$42,896, the average oil and gas industry salary (excluding gas stations) is substantially higher—\$64,463 annually. Overall the industry supports \$23.2 billion of the Florida economy. That's 3.1 percent of the state's total economic activity.

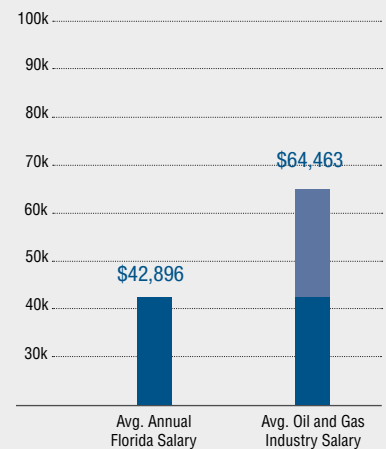
Florida also benefits from the production of oil and natural gas from shales and so-called "tight formations," energy development that uses the proven engineering technologies of hydraulic fracturing, or "fracking," and horizontal drilling. Total jobs supported by these activities in Florida reached 36,532 in

\$23.2 BILLION
THE INDUSTRY CONTRIBUTES
TO FLORIDA'S ECONOMY

286,800
FLORIDA JOBS

SUPPORTED BY OIL AND
NATURAL GAS INDUSTRY

AVERAGE ANNUAL SALARY COMPARISON



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).

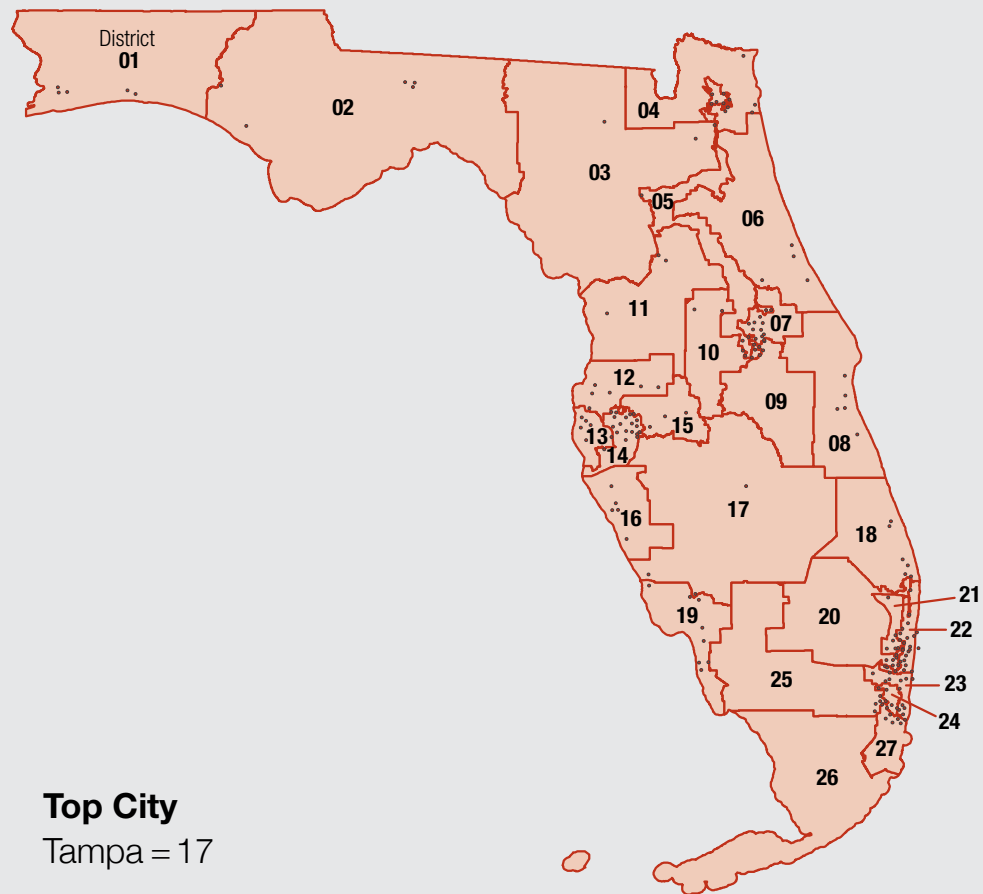
State: Florida

Vendors by Congressional District

Congressional District	Total
Congressional District 1	5
Congressional District 2	5
Congressional District 3	3
Congressional District 4	3
Congressional District 5	11
Congressional District 6	4
Congressional District 7	7
Congressional District 8	5
Congressional District 10	15
Congressional District 11	3
Congressional District 12	6
Congressional District 13	6
Congressional District 14	19
Congressional District 15	4
Congressional District 16	5
Congressional District 17	2
Congressional District 18	5
Congressional District 19	9
Congressional District 20	3
Congressional District 21	2
Congressional District 22	37
Congressional District 23	4
Congressional District 24	15
Congressional District 25	4
Congressional District 27	1
Grand Total	183

Florida Vendors by Congressional District

District Location ●



Top City
Tampa = 17

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

Germfree Laboratories (GERMFREE)

Germfree Laboratories, located in Ormond Beach, Florida, specializes in the design and construction of mobile/modular laboratories and primary containment equipment. The company provides products to a variety of industries, including oil/gas, public health, environmental, mining, and government. Germfree has been in business for more than five decades and has installed laboratories globally.

The company recently expanded its role in the oil and natural gas sectors. It offers its laboratory technology in response to industry needs, both domestically and internationally. Additionally, a wide range of prospective oil and natural gas industry customers have expressed interest in the company's mobile and modular labs. The laboratories make possible complex analyses, enabling customers to be more efficient in their operations out in the field.

2012. That job total is projected to rise to 65,063 in 2020 and to 79,499 in 2035.⁴

And the people of Florida get it. A statewide telephone poll of 614 registered Florida voters, conducted on behalf of the

American Petroleum Institute, found that 73 percent of them, regardless of party affiliation, support increased production of oil and natural gas resources located in the United State.⁵

- IHS Inc., "America's New Energy Future: The Unconventional Oil and Gas Revolution and the U.S. Economy," Washington, D.C., December 2012.
- "What America is Thinking on Energy Issues" <http://www.api.org/news-and-media/news/newsitems/2014/aug-2014/poll-large-majorities-of-florida-voters-support-increased-investments-in-us-energy-infrastructure> the results of a Florida 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.



AMERICAN PETROLEUM INSTITUTE

To find out more, visit API.org

for more information and follow us on Twitter@[EnergyTomorrow](https://twitter.com/EnergyTomorrow).

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

Congressional District 1

A&A Transfer & Storage, Inc
 American Association of Occupational Health Nurses, Inc
 Earthsoft, Inc
 James William Hooton
 W. T. Deshotels, Inc

Congressional District 2

Bay Walk In Clinic, Inc
 Bugware, Inc
 D Y Perez, LLC
 Florida Department of Revenue
 James R. Ashlock

Congressional District 3

Anderson Columbia Co, Inc
 Imgrail Consulting, Inc
 Pragmatic Works Software

Congressional District 4

Denali Consulting Group
 Earth Systems, Inc
 Shipxpress, Inc

Congressional District 5

Accounting Principals, Inc
 Allied Safety Systems, Inc
 Beeline, Inc
 Earth Systems, Inc
 Environmental Consulting and Inspired Perspectives, LLC
 MCI A Verizon Company
 Modis
 Onlinelabels, Inc
 Survitec Survival Products, Inc
 Transquip USA, Inc

Congressional District 6

Germfree Laboratories, Inc
 Jarek M. Aloysius
 Katherine Hooton Standing
 Ross J. Kasperek Liv Tr

Congressional District 7

Absorbent & Safety Solutions, LLC
 Australian American Chamber of IBM Corp

Impact Entertainment Services, LLC
 Kamel Software, Inc
 Lee Hecht Harrison, LLC
 Power Pro-Tech Services

Congressional District 8

4G Unwired, Inc
 Dr. Laurence Barton
 Hills, Inc
 Ocean Motions Co
 Satcom Direct, Inc

Congressional District 10

Armstrong Service, Inc
 Batteryweb.com
 Blake & Pendleton, Inc
 Daniels Mfg Corporation
 Data Graphics, Inc
 Gmpcs Personal Communications, Inc
 HD Supply Construction Supply Ltd
 HD Supply Electrical
 HD Supply Power Solutions Ltd
 Laser Institute of America
 Masthead Industries, Inc
 Mcconnell & Co, Inc
 Siemens Energy, Inc
 Techsherpas Technical It Services
 Vitesse Solutions, LLC

Congressional District 11

Donald L. Taylor
 Flair Corporation
 SPX Flow Technology Usa

Congressional District 12

Amerer, Inc
 Betty J. Shaw
 Hydrozonix, LLC
 Open Spatial Corporation
 Thunderbolt International, Inc
 Zeppelin Systems USA, Inc

Congressional District 13

Depco Pump Company
 Equant, Inc
 Hilda Pearl Briceland Trust

Lightning Master Corporation
 Paradyne Credit Corporation
 Phasetronics, Inc

Congressional District 14

AT&T
 Atkins North America, Inc
 Audio Visual Innovations, Inc
 Big Dog Trucking
 Faircourt, LLC
 Gerdau Ameristeel Us, Inc
 Jackson Transformer Company
 Metrohm USA, Inc
 Neofunds By Neopost
 Paradigm Learning, Inc
 PDMA Corporation
 Proctek, Inc
 QC Energy Resources, Inc
 Quality Lease Rental Service
 Quasius Investment Corporation
 Sunview Software, Inc
 Tampa Brass & Alum
 Technology Transfer Services, Inc
 The Anvil Group, LLC

Congressional District 15

Bulk Resources, Inc
 Rev1 Power Services, Inc
 United Rentals Northwest, Inc
 Wilkerson Instrument Co, Inc

Congressional District 16

Codeware, Inc
 Corticorp, LLC
 Grant Aceto Geraldine Patricia
 Interstate Products, Inc
 White Pine Farm, LLC

Congressional District 17

Caroline Csavas
 Sumbry Solutions & Services, LLC

Congressional District 18

Breakwater Consulting, Inc
 CSA Ocean Sciences, Inc
 G4S Secure Solutions USA, Inc
 Nuco2, LLC
 Ultimate Washer, Inc

Congressional District 19

4What, LLC
 Data 2 Logistics, LLC
 DW Drilling & Blasting, LLC
 Firemaster
 Flightdocs, Inc
 Louis A. Simpson
 Munters Corporation
 Patience B. Rockey
 Wicklund Petroleum Corporation

Congressional District 20

Event Decor Direct
 G Neil
 Ironwear

Congressional District 21

Blue Dot Energy Services
 Wholesale Carrier Services, Inc

Congressional District 22

Air Dimensions, Inc
 American Express Company
 Brooks Livingston
 Bureau Veritas North America, Inc
 CDA InterCorporation
 Chapman Freeborn
 Airchartering, Inc
 CIM Concepts, Inc
 Citrix Systems, Inc
 Credence Corporation
 DHL Express USA, Inc
 Embraer Aircraft Customer
 Fam Intl Security, Inc
 Geosyntec Consultants, Inc
 Global Tower Partners
 Gmpcs Personal Communications, Inc
 Hoerbiger Service, Inc
 James L. Wolff
 Katheryn K. Buhle
 Mix Telematics North America, Inc
 MMI Engineering, Inc
 Modcomp
 NI Satellite, Inc
 Partsbase Com
 PS Analytical, Inc
 Replweb, Inc

RTP Corporation
 Siboney Energy Services, Inc
 Signature Consultants, LLC
 SimplexGrinnell LP
 Spherion Corporation
 Standing Ovations
 Staples Technology Solutions
 Thales E Security, Inc
 The CEO Group, Inc
 The Mergis Group
 Voiceinterop, Inc
 Wearcheck Lubrication Services, LLC

Congressional District 23

Electronic Computer Services, Inc
 Hunter & Hunter Recruiting, Inc
 Knowledge United
 Witt Group Holding, LLC

Congressional District 24

AF Technipark Ten, LLC
 Best Web Resources, Inc
 Best Flowers Worldwide Bestflowers. Com
 BUTCH's Backhoe Service, Inc
 DET Norske Veritas (U.S.A.), Inc
 Electronic Computer Services, Inc.
 Genevieve Cavaliero
 Global Risk Solutions, Inc
 Guardian Fire Equipment, Inc
 Kaba Workforce Solutions
 Nancy L. Thomas
 Ryder Integrated Logistics
 S&S Works
 Sevanta Systems Corporation
 The Hackett Group, Inc
 University of Miami

Congressional District 25

American Welding Society, Inc
 Lawrence Factor, Inc
 Legend Aerospace, Inc
 Ludeca, Inc

Congressional District 27

Southwest Connection Call Center