

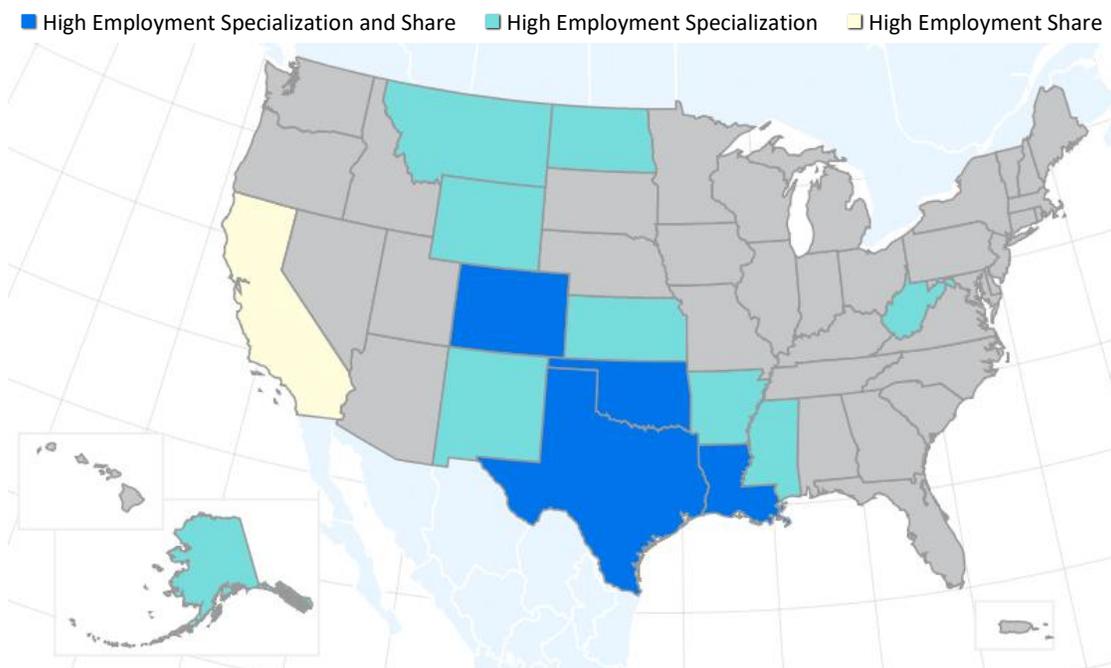
# U.S. Industry Report

## Oil and Gas Production and Transportation Cluster

The Oil and Gas Production and Transportation cluster represents subclusters in Petroleum Processing, Drilling Wells, Pipeline Transportation, Machinery, Extraction, and Operational Support Activities. This cluster includes industries ranging from Natural Liquid Gas Extraction (NAICS 211112) to Geophysical Surveying and Mapping Services (NAICS 541360). As of 2016, there are **25,923 establishments** across the United States that employ **572,442 professionals**, earning an **average annual wage of \$93,996**. The following four states offer high employment specialization *and* share.

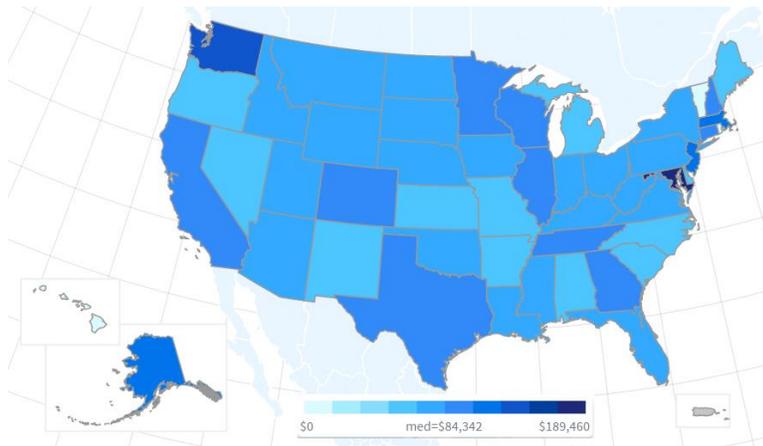
LOUISIANA	OKLAHOMA	TEXAS	COLORADO
Location Quotient 8.3	Location Quotient 7.9	Location Quotient 5.5	Location Quotient 1.9
Establishments 1,906	Establishments 3,238	Establishments 9,337	Establishments 1,206
Employment 57,239	Employment 46,881	Employment 256,645	Employment 20,103

### Top States by Specialization & Share



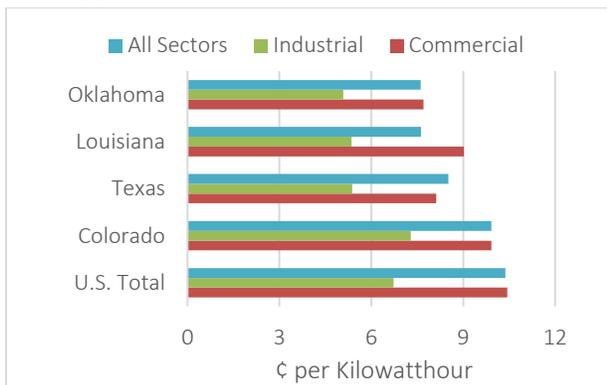
Source: U.S. Cluster Mapping Project

## 2016 Average Annual Cluster Wages



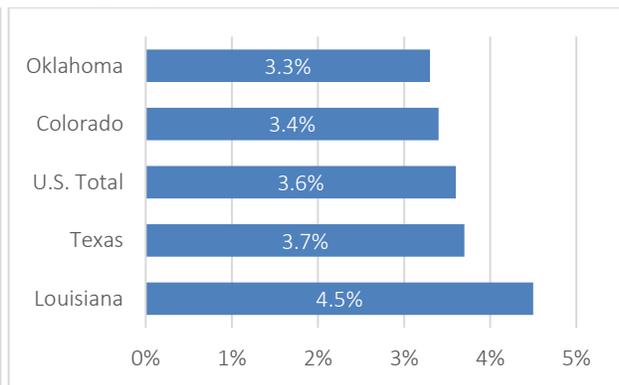
Source: *U.S. Cluster Mapping Project*

## Energy Costs (March 2019)



Source: *Energy Information Administration, Electric Power Monthly*

## Unemployment Rates (April 2019)



Source: *Bureau of Labor Statistics*

## State Cluster Trends (2011-2016)

Highest % ↑ in Employment	DELAWARE	NEW HAMPSHIRE	OHIO	MONTANA	IDAHO
	16%	14%	6%	5%	4%
2016 Employment	880	78	9,530	5,341	491

Most New Establishments	TEXAS	NORTH DAKOTA	OHIO	WISCONSIN	MINNESOTA
	+450	+155	+42	+20	+16
2016 Establishments	9,337	549	576	72	110

Highest ↑ in Location Quotient	NORTH DAKOTA	ALASKA	NEW MEXICO	MONTANA	DELAWARE
	+1.32	+1.05	+1.03	+0.82	+0.33
2016 LQ	10.62	8.69	6.49	3.77	0.55

Source: *U.S. Cluster Mapping Project*

## Definitions

**Cluster** – A cluster is a regional concentration of related industries that arise out of the various types of linkages or externalities that span across industries in a particular location.

**Establishment** – An establishment is a single physical location at which business is conducted or services or industrial operations are performed. It is not necessarily identical with a company or enterprise, which may consist of one or more establishments. When two or more activities are carried on at a single location under a single ownership, all activities generally are grouped together as a single establishment.

**Location Quotient** – A location quotient greater than 1 indicates a higher than average cluster concentration in a location.

**NAICS** – The North American Industry Classification System is the standard used by Federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy.

**High Employment Share** – States with high employment *share* rank among the top 10 percent of states with employment information by number of employees in an industry.

**High Employment Specialization** – States with high employment *specialization* have a location quotient ranking among the top 25 percent of states with employment information for an industry.

## U.S. States and Territories



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