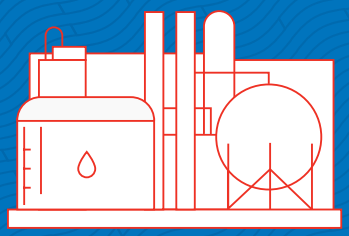
American Fuel & Petrochemical Manufacturers

AFPM

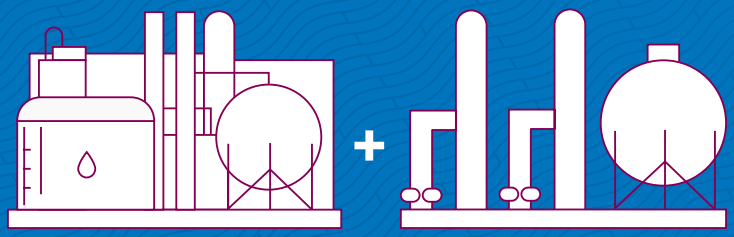
Driving Progress

2026 Annual Report

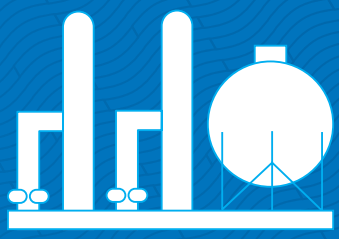
U.S. Refineries and Petrochemical Facilities



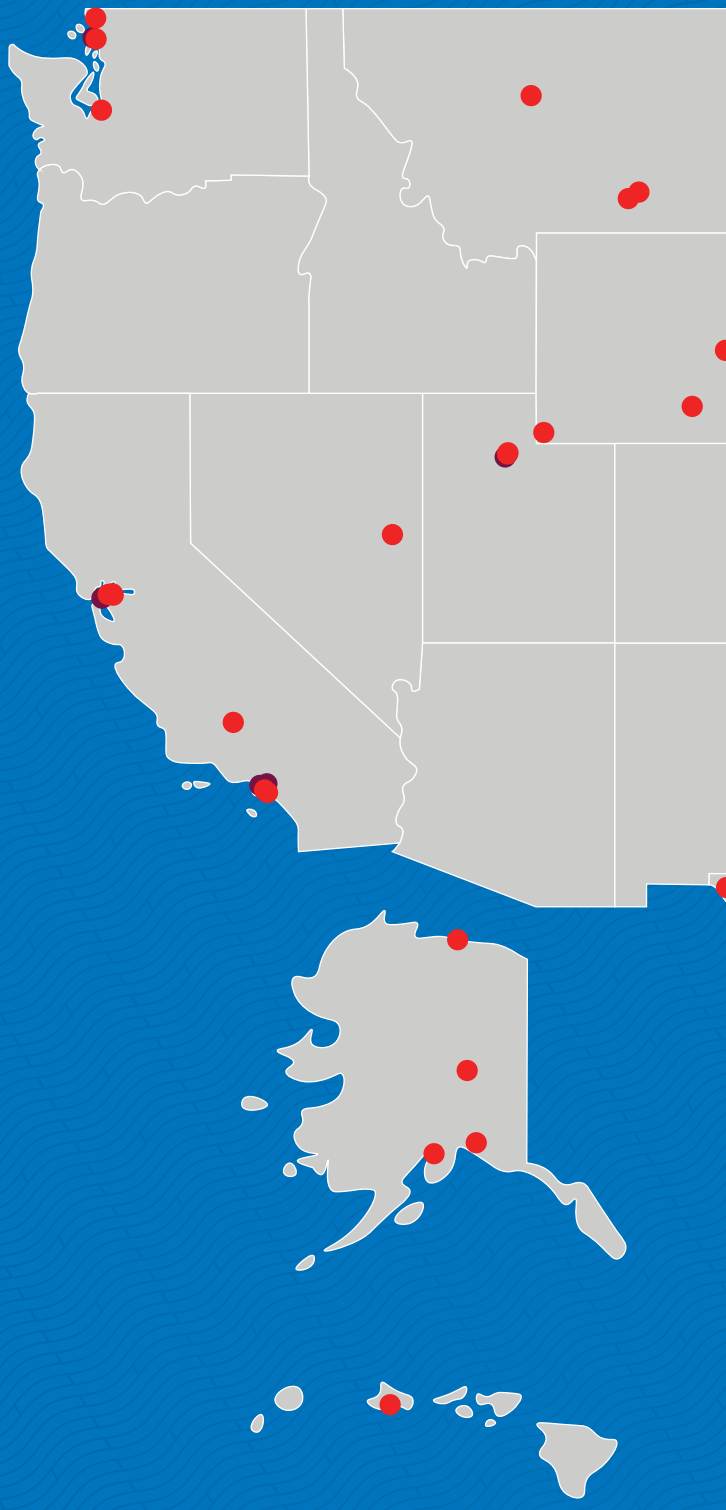
73 refineries produce gasoline, diesel, jet fuel and other products



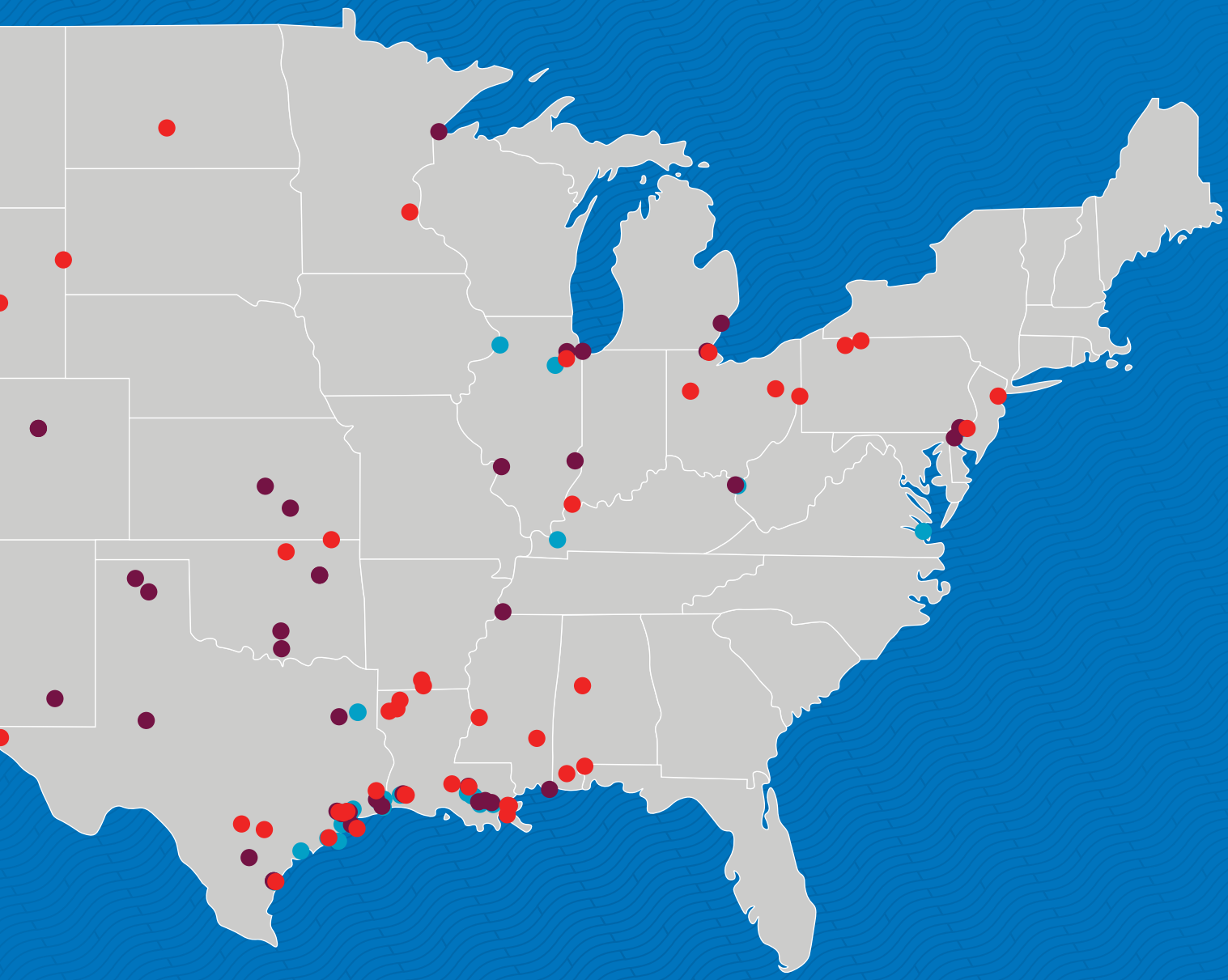
57 refineries produce gasoline and other fuels, and produce base petrochemicals at **212** petrochemical units colocated with the refineries



154 standalone petrochemical units produce base petrochemicals



There are 130 operable refineries and 366 petrochemical manufacturing units in the United States.



The American Fuel & Petrochemical Manufacturers (AFPM) is the leading trade association representing the makers of the fuels that keep us moving, the petrochemicals that are the essential

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building blocks for modern life and the midstream companies that transport our feedstocks and products where they need to go. We make products that make life better, safer and more sustainable.

A Message from the Chairman of the Board and President and CEO of AFPM

Dear Members,

Innovation, resilience and progress are what define the U.S. refining, petrochemical and midstream industries, and that was certainly the case throughout 2025. In the last year, AFPM member companies powered the economy, enabled modern life and met global energy demands, and did so responsibly.

America's refineries are technological leaders and economic engines, delivering reliable fuels to keep our country moving and supporting millions of jobs nationwide. Petrochemical manufacturers supply the essential building blocks for products that enhance safety, health and daily living. Quite literally, modern life depends on them.

Robust midstream infrastructure—pipelines, ports, railroads and storage facilities—is the backbone of a resilient supply chain, enabling the safe, reliable and affordable delivery of energy and petrochemical feedstocks and products to every corner of our country and to our allies around the world. Great progress was made in 2025 to bring energy infrastructure and permitting reform to the national forefront, and we need to get those policies across the finish line in 2026.

The health and safety of the workforce, our community neighbors and environment are top priorities for every AFPM member, and they invest accordingly. Our industries remain among the safest of all U.S. manufacturers and are global leaders in lower emissions fuels and technologies, waste reduction and recycling.

This annual report highlights industry achievements and the vital role we play in serving people, the nation and communities. Thank you for your ongoing support and partnership as we work together to advocate for policies that uphold consumer choice and allow our industries to meet the dual challenge ahead of us—providing the fuels and products a growing world needs to thrive, while operating in ever cleaner, safer and more sustainable ways.

Thank you for your continued support.

Sincerely,

Willie

Willie Chiang
AFPM Chairman of the Board

Chairman &
Chief Executive Officer
Plains All American Pipeline, L.P.

Chet M. Thompson
President and CEO

American
Fuel & Petrochemical
Manufacturers

Refining

Refining

The U.S. refining industry is the most advanced and efficient in the world. It produces the gasoline, diesel and energy products that fuel our economy, meet Americans' energy needs, safeguard U.S. energy and national security and support America's allies around the world. These facilities are not only technological leaders but also economic engines, supporting millions of jobs and generating billions in wages and substantial contributions to U.S. Gross Domestic Product (GDP) and trade.

U.S. Refining Production

In 2025, American refiners produced an estimated 273 billion gallons of refined petroleum products. This output keeps energy reliable and affordable in the United States and supplies key markets abroad, highlighting the industry's essential role in both domestic and global energy security.

2025 Estimated Volumes of Refined Products

Total Petroleum Product Production
273 billion gallons

Jet Fuel Production
28 billion gallons

Gasoline Production
122 billion gallons

Distillate Production
76 billion gallons

Source: AFPM analysis of U.S. Energy Information Administration data

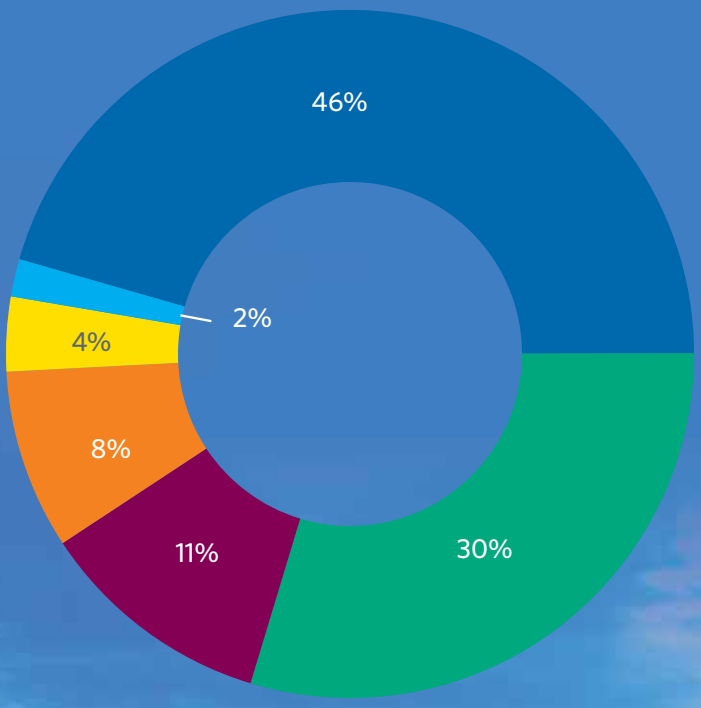
The Role of U.S. Refiners: Supplying Energy at Home and Abroad

Energy markets are global—and so is the reach of U.S. refiners. The United States refining kit is comprised of 130 facilities that have 18 million barrels per day[1] of operable crude distillation capacity. The U.S. refining industry leads the world in complexity and efficiency—producing more liquid fuels and refined products than any other country, and more than even the United States consumes. Since 2011[2], the United States has been a net exporter of refined product—years prior to America reaching overall net energy exporter status in 2019[3]. Output from American refineries strengthens the U.S. trade balance and supplies essential fuels to consumers in all 50 states and more than 150 countries.

U.S. refinery utilization averaged 92 percent[4] in 2025, underscoring the industry's ability to operate at near-peak performance. This high level of efficiency supports robust production of refined fuels and other products. U.S. refining capacity is concentrated in the U.S. Gulf Coast region—particularly Texas and Louisiana—where capacity far exceeds local demand and substantial infrastructure, including ports, terminals and pipelines, supports supplying refined products to the global market. As global demand for refined petroleum products grows—driven by global population increases and a rising middle class—U.S. refiners are well-positioned to meet that need. With a strong record of performance and innovation, they will continue to deliver affordable, reliable and increasingly sustainable fuels for America and its global partners in the years ahead.

U.S. Refinery Yield

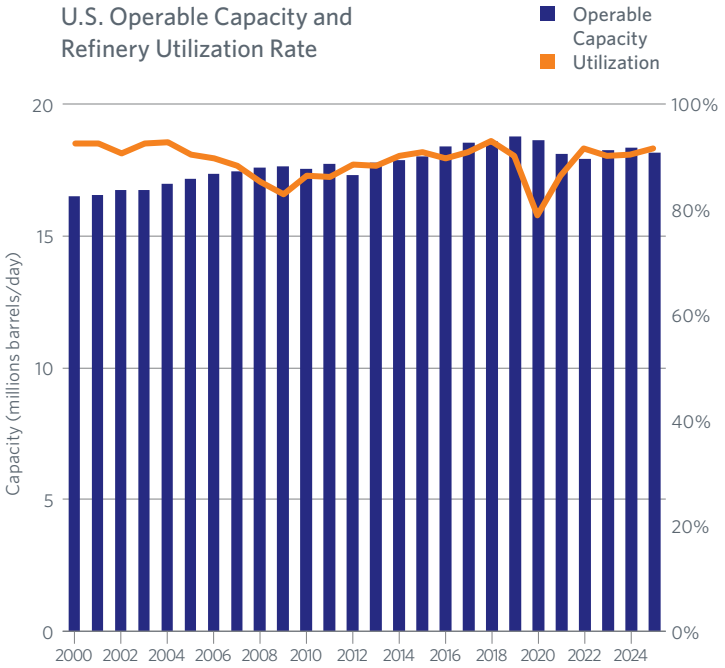
(2025 Projection)



Refinery yield is the share of different products (like gasoline, diesel and jet fuel) that a facility produces from crude oil and other feedstocks.

Source: AFPM analysis of U.S. Energy Information Administration (EIA)

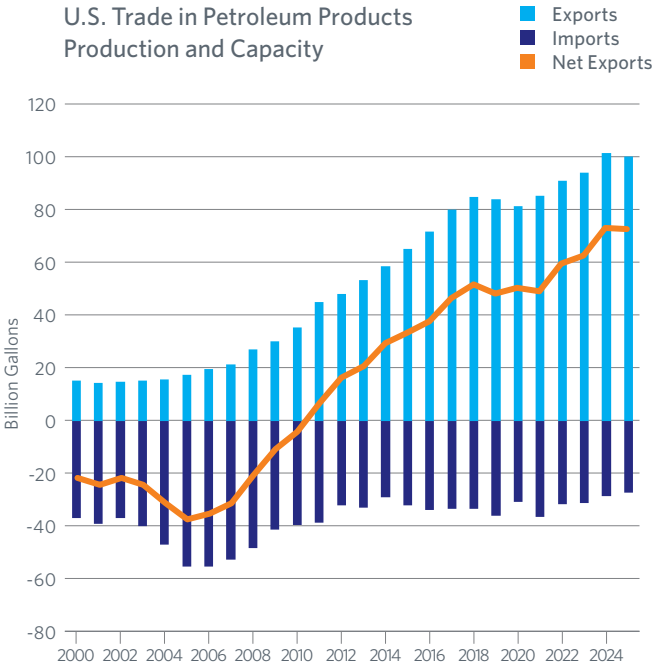
U.S. Operable Capacity and Refinery Utilization Rate



Refinery Utilization is the amount of crude oil a refinery or group of refineries actually process into gasoline, diesel, jet fuel and other products compared to the maximum amount of crude oil the refinery/refineries could process.

Source: U.S. Energy Information Administration (EIA)

U.S. Trade in Petroleum Products Production and Capacity

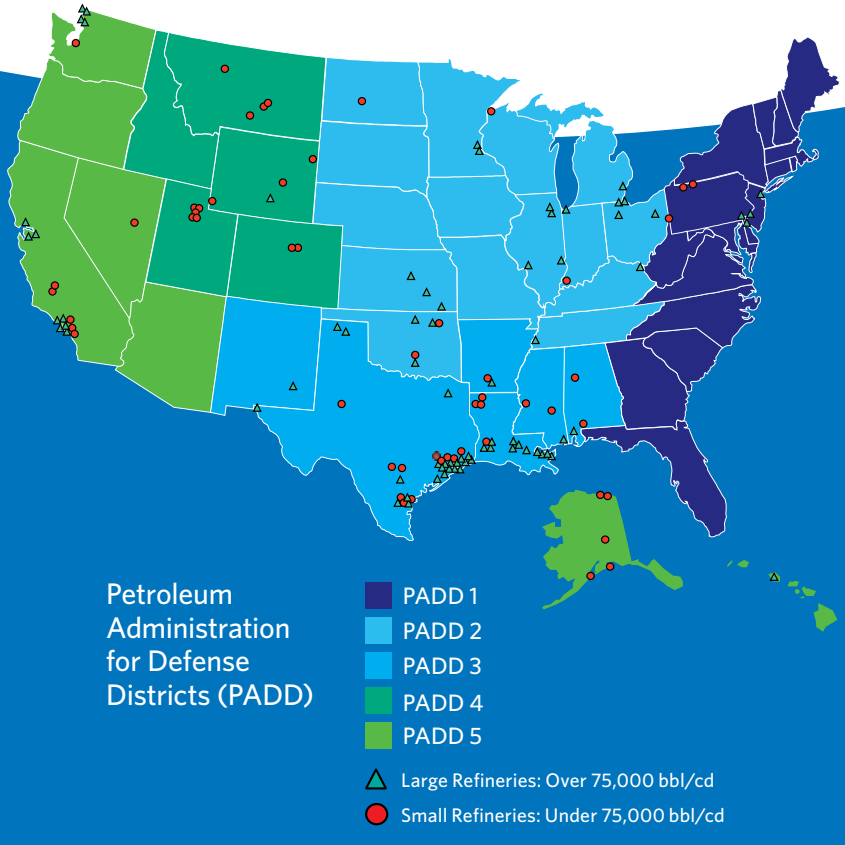


The United States is a net exporter of petroleum, yet it still imports significant volumes of crude oil. Much of this crude is refined domestically into gasoline, diesel and jet fuel that are later exported.

Source: AFPM analysis of U.S. Census Bureau and S&P Global data

How PADDs Shape U.S. Refining and Fuel Distribution

The United States petroleum system can be organized based on the Petroleum Administration for Defense Districts (PADDs), a structure originally established during World War II to streamline fuel allocation and logistics. Today, these districts remain a useful way to understand regional refining capacity, crude slate differences, infrastructure networks and product flows across the country. Examining U.S. refining through the lens of the PADDs helps illustrate the location of refining capacity, how refined products move to meet consumer demand, and the critical role each district plays in supporting national energy reliability and security.



North American Crude Powers U.S. Refineries

Refineries in the United States primarily run on domestic oil, but national refining capacity exceeds domestic crude production, requiring imports to meet demand. Free trade helps bridge this gap by providing access to the right types of crude at competitive prices.

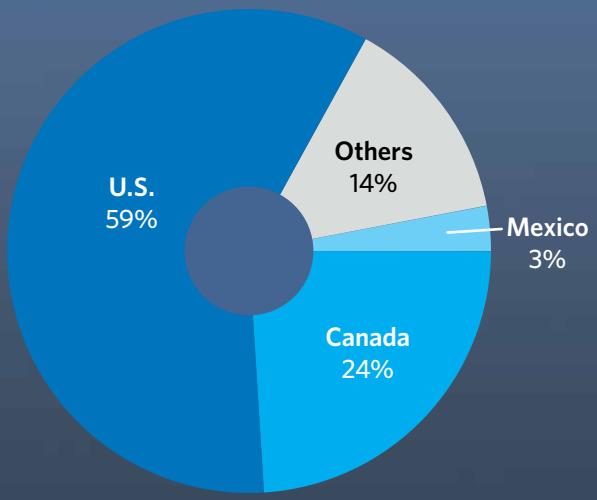
In 2025, U.S. refineries processed 16.3 million barrels per day of crude oil, while domestic production averaged 13.6 million barrels per day. Most imported crude comes from Canada and Mexico. Together with U.S. production, these three countries supply 86 percent of the crude oil processed by American refineries. Canada is the largest source of imports, with Mexico second—and Mexico is also the top buyer of U.S. refined products. These trade relationships keep fuel affordable, support efficiency and strengthen energy security.

The crude oil imported from Canada and Mexico tends to be heavier and higher in sulfur—challenging for less sophisticated refineries abroad, but well-suited to the advanced systems used in U.S. facilities. Limiting American refineries to just the light, low-sulfur (sweet) crude that dominates U.S. crude oil production would reduce facility efficiency, decrease production of the most valuable refined products, and threaten the long-term viability of the U.S. refining industry.

Free trade in North America isn't just good policy—it's essential. It makes energy affordable, strengthens U.S. energy security and supports a competitive U.S. refining sector. Restricting it would do the opposite.

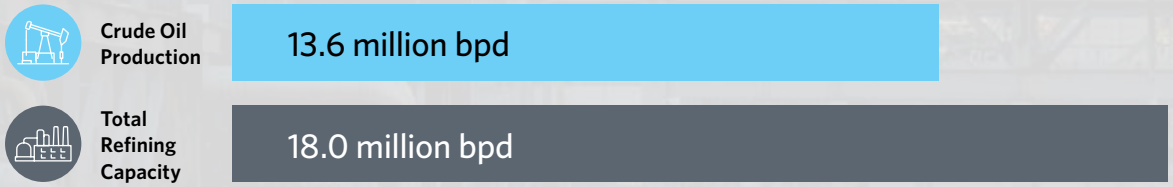
86 Percent

of crude oil processed by U.S. refineries is produced in North America.



U.S. Refinery Production and Capacity

U.S. crude oil production continues to fall short of U.S. refining capacity, requiring imports of crude oil from the global market.



Source: U.S. Energy Information Administration

When Policy Pushes Refining Out—Who Loses?

California makes no secret of its ambition to eliminate demand for liquid fuels and phase out and eventually shutter all its refineries. But beneath the talking points lies a more complex reality: California needs oil and gas. From transportation and construction to manufacturing and materials, petroleum remains essential to daily life in California and its $3 trillion economy[5].

Ironically, while California sits atop significant oil reserves in the Monterey Formation, state policies limit the supply of California produced crude oil, and infrastructure limits constrain supplies to the state from other parts of North America. As a result, most of the crude oil processed by California refineries must be imported—often from countries with weaker environmental and labor standards and less stable political and financial regimes. Relying on imports of crude oil and refined products, an inevitable consequence of restricting in-state crude oil production and closing refineries, may increase global pollution—the exact opposite of California's intended goal.

California's anti-liquid fuel agenda also raises national security concerns. Military bases in California and neighboring Western states depend on the region's refineries for specialized fuels. As refining capacity shrinks, reliance on foreign sources will grow—introducing strategic risks and demanding a realignment of America's midstream infrastructure.

Finally, there's cost. Californians continue to pay the highest gas prices in the country, driven by a complex mix of regulations and taxes. Today, the cost of every gallon of gasoline they buy is inflated by about $1.82 just in taxes, regulatory costs and fees; $1.64 for California state and local policies; plus 18 cents in federal tax. These costs hit lower-income residents hardest, especially those who rely on gas-powered vehicles and lack access to public transit.

Fueling America's Future

Liquid fuels—whether fossil-based or renewable—will continue playing a major role in how Americans travel for years to come. Most Americans rely on internal combustion engine (ICE) vehicles because they're affordable, practical and widely available. While electric vehicles (EVs) have a place in the vehicle market, they still represent a small fraction of cars on the road, and any transition should reflect consumer choice, not government mandates.

The United States is uniquely positioned to meet this ongoing demand. U.S. refiners produce more liquid fuels than any other country, and do so with unmatched safety, efficiency and environmental responsibility. They supply more fuel than Americans consume, and the nation also leads the world in advanced biofuels production capacity.

Maintaining a strong, diverse fuel supply is essential for energy security and consumer choice—now and in the future.

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Advancing Renewable Fuel Production

AFPM members are supporting the development of renewable diesel (RD) and sustainable aviation fuel (SAF) by investing in new capacity, upgrading facilities and scaling advanced technologies to meet evolving market needs. These efforts reflect years of strategic investment and technical expertise, positioning U.S. refiners as global leaders in advanced renewable fuels. From commercial aviation to heavy-duty transport, AFPM members are advancing renewable fuels at scale—delivering reliability and innovation that strengthens America's energy future.

The numbers tell the story:

- **92%** of U.S. RD and SAF operational production capacity is owned by petroleum refiners[6]
- **86%** of total U.S. RD and SAF operational production capacity belongs to AFPM members[7]
- The United States accounts for **46%** of global operational RD/SAF capacity[8]

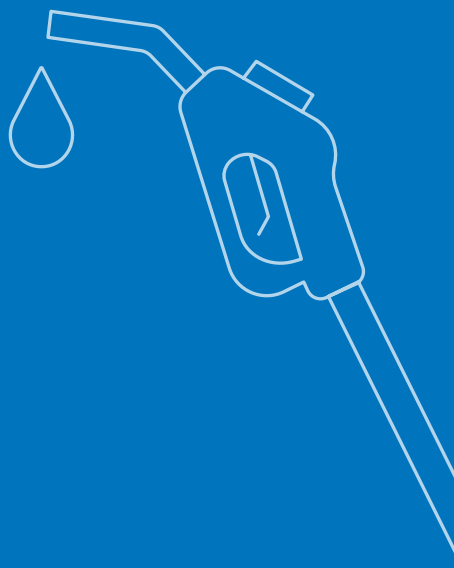
Next Generation Fuels

What is...?

Renewable Diesel: Renewable diesel is made from renewable resources such as vegetable oils, animal fats and waste cooking oils. Unlike biodiesel, it is chemically almost identical to petroleum diesel, which means it can be used in existing diesel engines and infrastructure without modifications.

Renewable Natural Gas (RNG): Renewable natural gas is a clean energy source made by refining biogas from organic waste—such as landfills, wastewater treatment plants and agricultural operations—until it closely matches the composition and performance of conventional natural gas. Once upgraded, RNG can be used for heating, electricity or as transportation fuel, while helping reduce greenhouse gas emissions and repurpose waste.

Sustainable Aviation Fuel: Sustainable Aviation Fuel is a type of fuel made from renewable or waste-based resources that can be used in existing aircraft engines as a drop-in replacement for conventional jet fuel.



Supporting Our Nation and People

The U.S. refining industry is a cornerstone of America's economic strength. Generating $325 billion[9] in labor income and adding over $678 billion[10] to the national economy, the industry fuels prosperity across every state and community. Its contributions—$80 billion[11] in federal and $81 billion[12] in state and local taxes—provide critical funding for schools, roads and emergency services that millions of Americans rely on every day. With over 2.8 million[13] American jobs supported by refining, the industry stands as a vital partner in sustaining communities and driving national progress. Its impact reaches far beyond the energy sector, strengthening families, funding essential services and powering the U.S. economy.

In 2024, the refining industry's jobs multiplier was 40—a powerful indicator of its broad economic reach. For every person employed at a petroleum refinery, 39 additional jobs are supported across the economy. This multiplier reflects the industry's exceptional productivity and substantial footprint. Each job—whether direct, indirect or induced—helps sustain families, strengthens local economies and generates tax revenues that fund essential public services nationwide.

Direct Jobs: the people who work inside refineries, operating equipment, maintaining safety and ensuring reliable energy supply.

Indirect Jobs: the workers who provide critical support—whether at company headquarters, as contractors on-site or as suppliers delivering parts and services.

Induced Jobs: the jobs that are supported in local businesses where refinery employees spend their paychecks—restaurants, grocery stores, auto repair shops and countless others.

$678 billion
added to U.S. economy

2.8 million jobs
each refining job generates **39** more

$161 billion
local, state and federal taxes paid

Petrochemical

Petrochemical

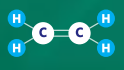
Petrochemicals are essential to modern living—enabling products that support health, safety and sustainability, from medical devices and packaging to insulation and lightweight vehicles. They are also the building blocks for plastics, which are critical to countless applications in healthcare, transportation, technology and consumer goods. As innovation drives new uses for both petrochemicals and plastics, these materials will continue to fuel economic growth and support a more sustainable future.

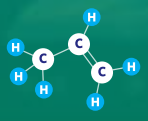
While AFPM members continue to invest in new technologies to meet rising petrochemical and plastics demand, they are also committed to investing in technologies, processes and products that will increase plastics recycling and reduce plastic waste in the environment.

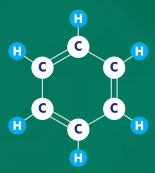
What are petrochemicals?

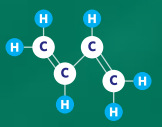
Petrochemicals are chemical compounds primarily made from crude oil and natural gas liquids (NGLs)—like ethane and propane—through processes like refining and steam cracking. They are the building blocks for many products we use every day, such as plastics, synthetic rubber, detergents, adhesives, fertilizers and medicines.

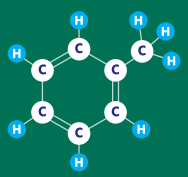
They are categorized into basic building blocks—such as ethylene, propylene, butylene, benzene, toluene and xylene—which are further processed into more complex chemicals and materials. And thanks to their versatility, adaptability and large-scale production, petrochemicals drive economic growth and technological progress across nearly every sector of the economy.

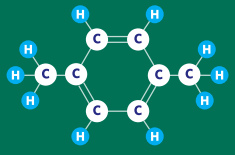

ethylene


propylene


benzene


butadiene
(butylene example)


toluene


xylene

Powering our Economy

The U.S. petrochemical manufacturing industry plays a critical role in America's economy—generating more than $57 billion in labor income and contributing over $180 billion to the national economy. With more than 619,000 American jobs supported by petrochemical manufacturers, the industry helps sustain communities, support families and fund essential services.

In 2024, the industry's jobs multiplier reached 15, highlighting its broad economic reach. For every job inside a petrochemical facility, 14 additional jobs are supported across the economy.

$180 billion
contributed to GDP

$57 billion
in labor income

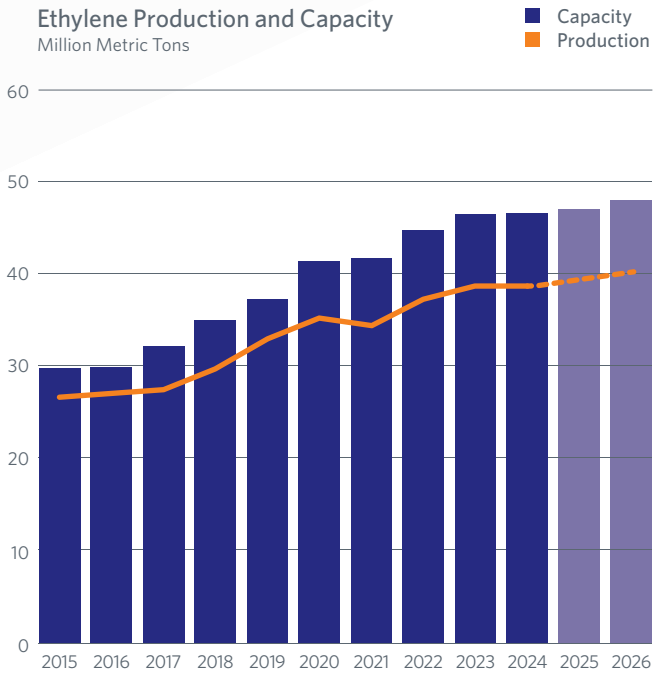
+619,000 American jobs
supported by industry

Driving U.S. Petrochemical Leadership

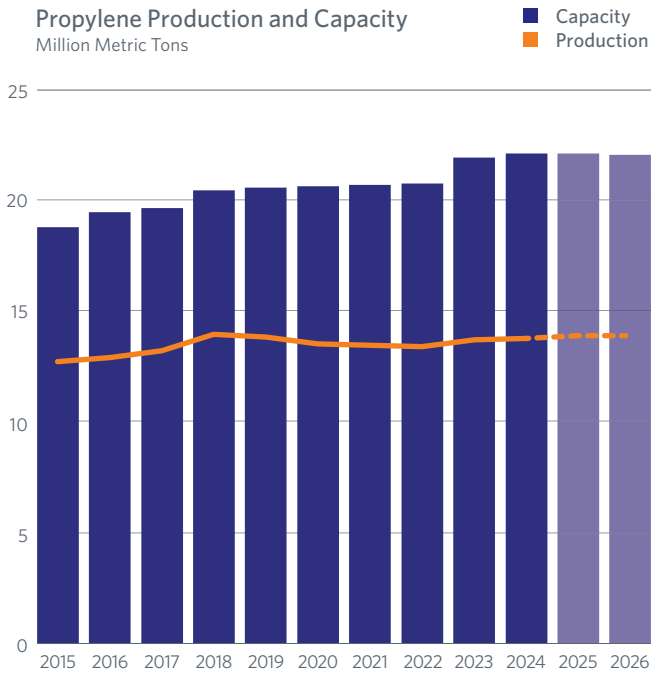
The United States is a leader in the production of ethylene and propylene—two of the most essential building blocks of products that make modern life possible. We are advantaged over our global competitors due to our access to abundant, reliable and, in some cases, low-cost domestic feedstocks like ethane and propane—critical components of these vital chemicals.

This edge is reinforced by the Gulf Coast's integrated logistics infrastructure, where pipelines streamline material movement and ports provide direct access to global markets—making the United States a critical hub for petrochemical trade worldwide.

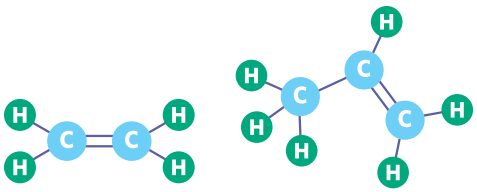
U.S. Olefin Production and Capacity



Source: AFPM analysis of U.S. Census Bureau and S&P Global data
Note: 2025 and 2026 are projections.



Source: AFPM analysis of U.S. Census Bureau and S&P Global data
Note: 2025 and 2026 are projections.



ethylene

propylene

What are olefins?

Ethylene and propylene are olefins. Olefins (or alkenes) are molecules made of hydrogen and carbon atoms; they have at least one pair of carbon atoms connected by a double bond. The carbon–carbon double bond is less stable than a single bond, so it reacts easily with other chemicals. This reactivity allows olefins to be transformed into many useful products.

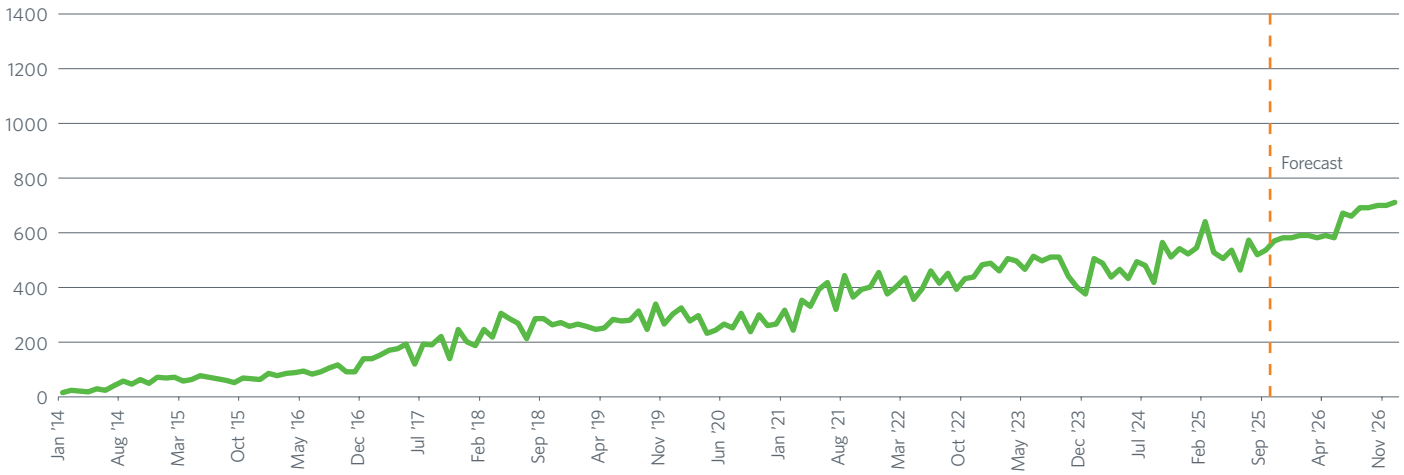
- **Ethylene (C_2H_4)** is the simplest olefin, with one double bond between two carbon atoms.
- **Propylene (C_3H_6)** also has a double bond—specifically between the first and second carbon atoms—which makes it an olefin.

They are key building blocks in the petrochemical industry and are used to produce plastics, synthetic fibers and many other products.

U.S. Exports of Key Petrochemicals

Strong global demand for ethane—an essential feedstock for producing ethylene and plastics—continues to rise. As the only major exporter capable of shipping ethane by sea, the United States holds a pivotal position in sustaining global petrochemical supply chains. Beyond ethane, U.S. production and exports of ethylene and propylene are vital to meeting international demand for packaging, construction materials and advanced products.

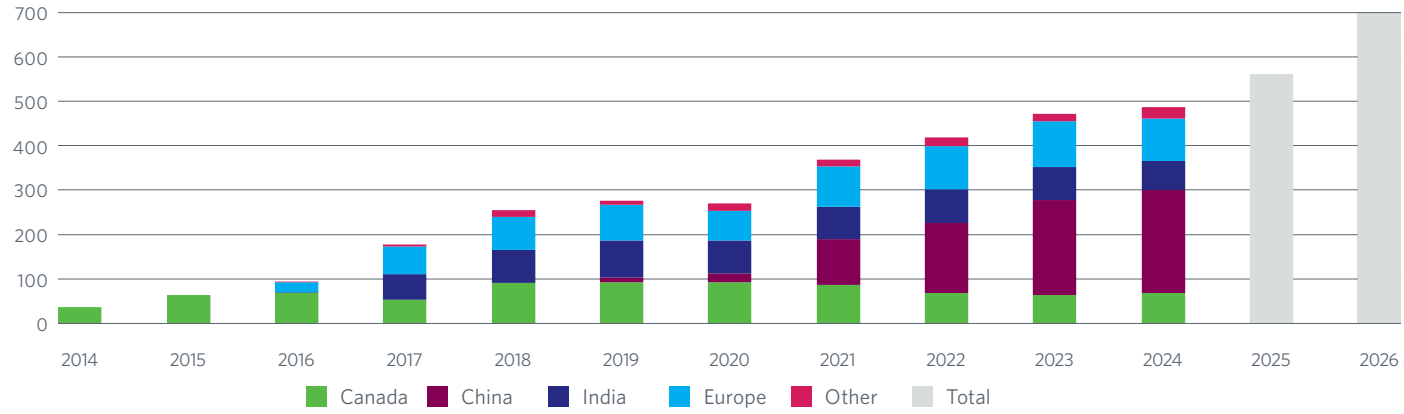
U.S. Exports of Ethane
Thousands of Barrels per Day



According to the U.S. Energy Information Administration (EIA), U.S. ethane exports are poised for significant growth through 2026, driven by robust demand for ethane as a petrochemical feedstock, substantial U.S. export capacity expansion and larger vessels to carry ethane exports.

Source: U.S. Energy Information Administration (Historical Data and November 2025 Short-Term Energy Outlook (STEO))

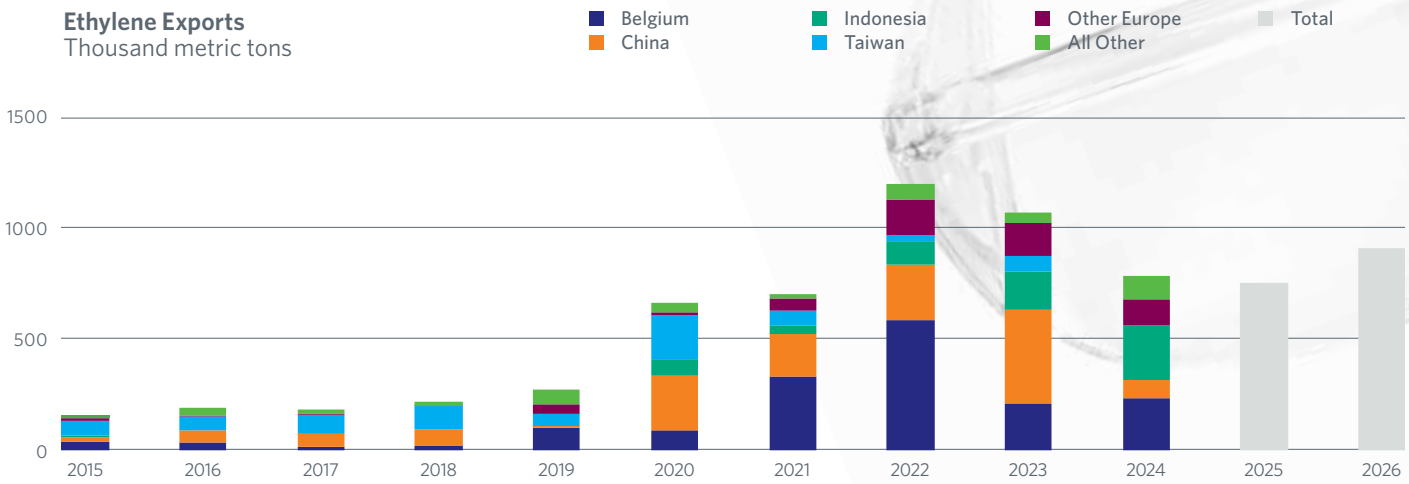
U.S. Exports of Ethane by Destination
Thousands of Barrels per Day



According to EIA, developers in the United States are expanding ethane export capacity to meet increasing global demand for ethane as a petrochemical feedstock.

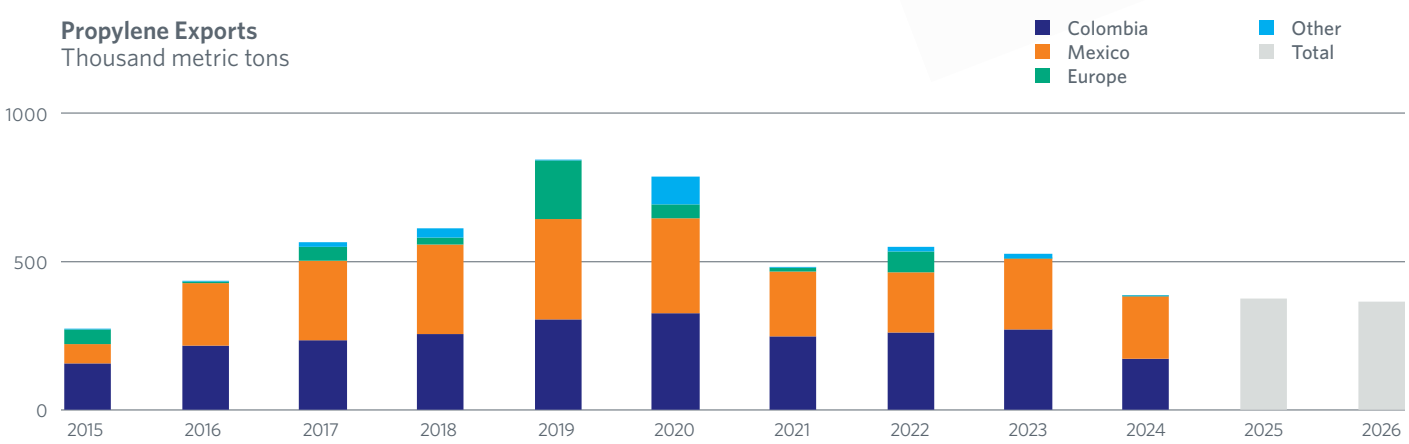
Source: U.S. Energy Information Administration (Historical Data and November 2025 STEO)

Ethylene Exports
Thousand metric tons



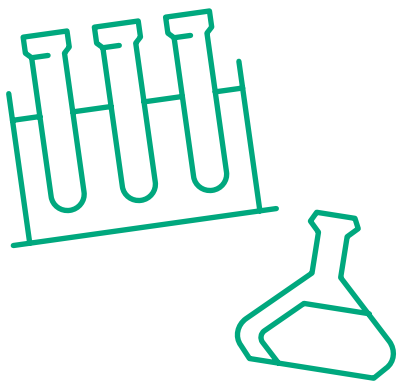
Source: U.S. Energy Information Administration (Historical Data and November 2025 STEO)
Note: 2025 and 2026 are projections.

Propylene Exports
Thousand metric tons



Ethylene and propylene—the world's most essential petrochemicals—drive U.S. export growth.

Source: U.S. Energy Information Administration (Historical Data and November 2025 STEO)
Note: 2025 and 2026 are projections.



Addressing Chemical Risks

The petrochemical industry's commitment to safety extends beyond production to continuous improvement of chemical safety, environmental stewardship and operational excellence.

In the United States, these efforts are guided by rigorous oversight from the Environmental Protection Agency (EPA), which reviews and manages risk under the Toxic Substances Control Act (TSCA). Through data-driven risk management and advanced testing protocols, the industry works in partnership with regulators to protect people and the planet while delivering the materials that millions rely on every day.

TSCA

Understanding TSCA

TSCA, first enacted in 1976, authorizes EPA to regulate manufacturing and related activities involving chemicals, particularly those that EPA determines present an "unreasonable risk of injury." Since the statute directly affects a company's ability to make, sell and use chemicals, it has implications for entire U.S. supply chains and interstate commerce. For instance, TSCA requires EPA to evaluate the risks of a chemical before it is commercially manufactured or imported, as well as chemicals that are already in commercial production and use. For chemicals that EPA finds present an "unreasonable risk of injury," it must develop regulations to remove that unreasonable risk of injury.

TSCA's Overcorrection. Changes to TSCA in 2016 empowered EPA to reinterpret how the Agency evaluates risk and led it to, at times, move away from a risk-based approach toward a hazard-based approach. A risk-based approach considers both the hazard of a chemical and exposure to it, while a hazard-based approach focuses primarily on the inherent properties of a chemical, regardless of whether people or the environment is exposed to it.

In the last few years, EPA increasingly shifted its post-2016 risk evaluation practices toward a more hazard-driven approach. Under this pivot, the agency evaluated a chemical across all possible conditions of use—including accidental releases—rather than assessing specific use cases individually. This EPA approach, known as the "whole chemical" framework, treated a chemical as presenting an unreasonable risk if any possible scenario (including hypothetical ones) could lead to an unreasonable risk of injury.

EPA's approach gave little weight to the likelihood or severity of exposure or to existing regulatory or mitigation practices (e.g., closed loop processing or personal protective equipment), which caused uses that do not pose an unreasonable risk to nevertheless be regulated as though they did. In this way, EPA's whole chemical approach functionally defaulted to regulation that removed or restricted chemicals from U.S. commerce, even for conditions of use that do not pose an unreasonable risk of injury. This regulatory practice remains in effect, but the current EPA leadership is now seeking to reverse it.

Other Regulatory Issues. There were also concerns that EPA has tried to use TSCA to restrict plastic production and advanced recycling. For example, EPA prioritized the review of petrochemical building blocks that are used in the production of plastics even though these chemicals present a very low likelihood of exposure during the manufacturing or plastic production processes.

EPA has also pursued new TSCA regulations for advanced recycling products. The agency proposed regulating components of pyrolysis oil that could be used as circular feedstocks for plastics manufacturing or replacements for crude-based fuel components. These products are chemically indistinguishable to those already listed on the TSCA Inventory and do not require additional regulatory action under TSCA. EPA, based on legal weaknesses on a rule impacting 18 chemicals used in plastics production, withdrew that proposal.

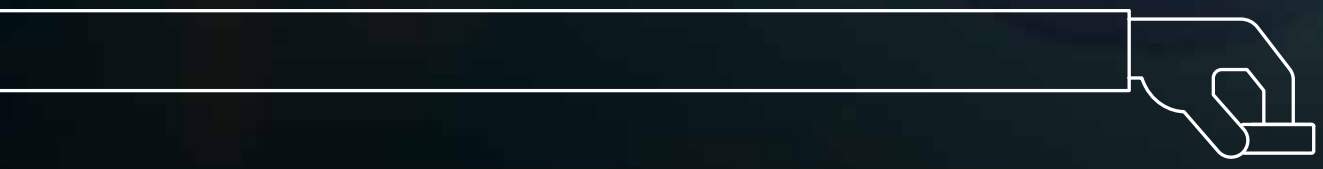
Policy Threatening Innovation. Any focus on removing processes, based on feedstocks and specific products, may lead to the elimination of chemicals and plastics that are essential to many lifesaving and life-enhancing goods, including personal protective gear and medical, emergency response and military equipment, among others. They could also threaten the expansion of advanced recycling, which is a critical component of advancing a more circular economy for plastics.

Addressing Plastic Waste

Petrochemical manufacturers, working with partners across the plastics value chain, are leading global efforts to tackle plastic waste through innovation and investment. With over $18 billion[14] invested across 161 global projects[15], petrochemical manufacturers are accelerating the transition to a circular economy for plastics.

These initiatives include building advanced recycling facilities, deploying, sorting and processing technologies, and creating systems that help communities actively participate in recycling programs. At the same time, manufacturers are working with customers to improve how plastic products are designed. Their efforts have resulted in reducing excess packaging, simplifying materials and making it easier for plastics to be reused or recycled.

Together, these efforts reflect a shared commitment to a more circular economy—one where materials are reused, repurposed and reintegrated into the value chain. By transforming how plastics are produced, managed and recycled, AFPM members are helping to reduce environmental impact, conserve resources and build a more sustainable future.



$18 billion
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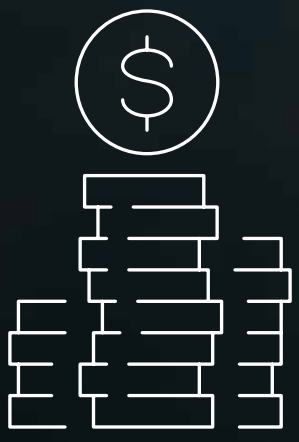
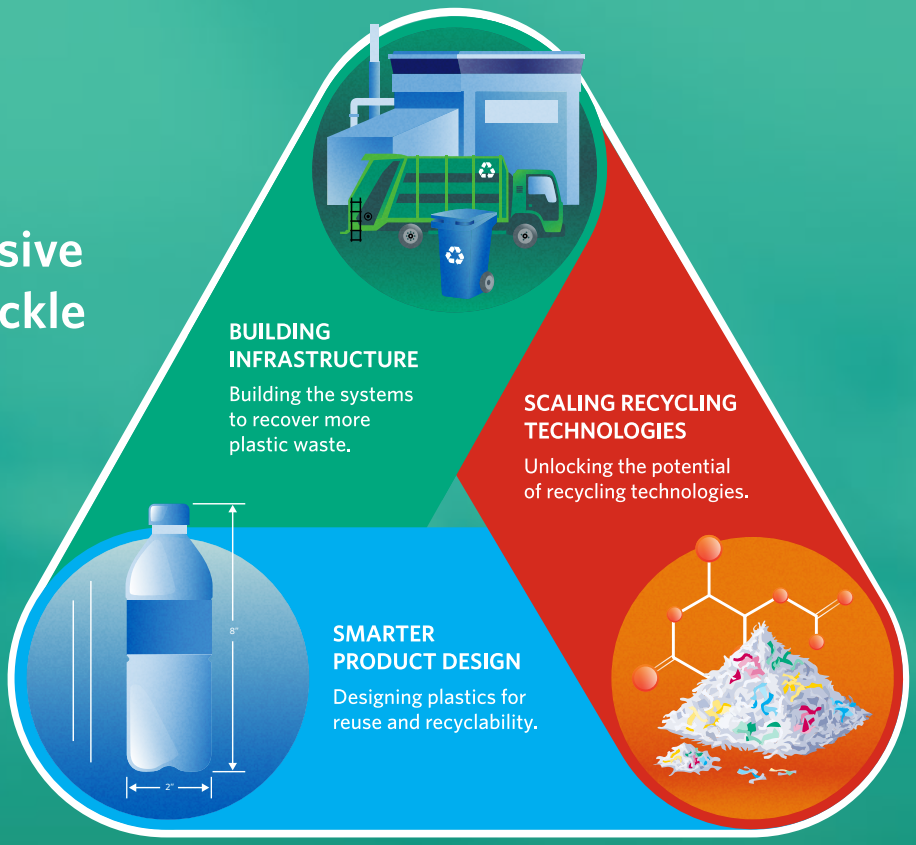


A comprehensive strategy to tackle plastic waste



Prioritizing Plastics Recycling

AFPM members are prioritizing plastics recycling and advancing circularity by investing in smarter, more efficient systems. Recognizing that better collection, sorting and infrastructure are essential to meeting recycling goals, our members are adopting cutting-edge technologies and collaborative waste intelligence platforms to keep plastics in circulation and out of the environment. These efforts reflect a shared commitment to building a more sustainable, regenerative plastics economy.

- **Dow** is partnering with Google to improve the circularity of hard-to-recycle plastics such as films and flexibles by using AI sensing technology in the recycling stream. By combining Dow's materials science expertise with Google's AI technologies, the partnership aims to revolutionize the way recycling centers process plastic by making the process more effective and efficient. The companies have already demonstrated the ability to use machine vision tools to identify the components of flexibles and films and to predict material composition percentages in each piece of packaging.
- **ExxonMobil**'s second advanced recycling unit in Baytown, Texas, is now operational, doubling its capacity to convert plastic waste into feedstocks. Since launch, the facility has processed over 100 million pounds of plastic waste. Looking ahead, ExxonMobil plans to invest more than $200 million to expand advanced recycling at its Baytown and Beaumont, Texas, sites, adding 350 million pounds of annual capacity by 2026 and aiming to reach 1 billion pounds by 2027.[16]

Member Spotlight

"Sustainability is a major focus for both our company and me personally. We can now make products that weren't traditionally considered recyclable or sustainable.

"We've developed products using recycled content that still perform equally well. For instance, PVC, not historically seen as recyclable, shows advantages when recycled content is added. Electrical boxes in your house, for example, gain more rigidity and durability with recycled PVC compared to virgin material."

— Bridget Confait-Smith
Associate Director of Research Innovation, Technology and Global Sustainability
Westlake Corporation

United Nations

Supporting Global Action on Plastic Waste

AFPM members are strongly committed to reducing plastic waste and continue to support international efforts to address it. Since 2022, AFPM has taken part in United Nations negotiations as an official observer, working alongside representatives from more than 170 countries to help shape a global agreement to end plastic pollution.

At each session, we've pushed for a practical approach—one that recognizes the value plastics bring to everyday life, encourages innovation, improves waste management and accelerates a global transition to a more circular economy for plastics.

In 2025, AFPM joined negotiations aimed at finalizing a legally binding treaty. While countries didn't reach agreement, we remain engaged and continue to urge the Trump Administration to stay involved.

During the latest round of talks, AFPM shared technical insights with negotiators, helping them understand the plastics and petrochemical supply chains and the impact of different policy alternatives. We highlighted the need to protect innovation—especially in advanced recycling—and called for solutions that support both environmental goals and the benefits plastics provide.

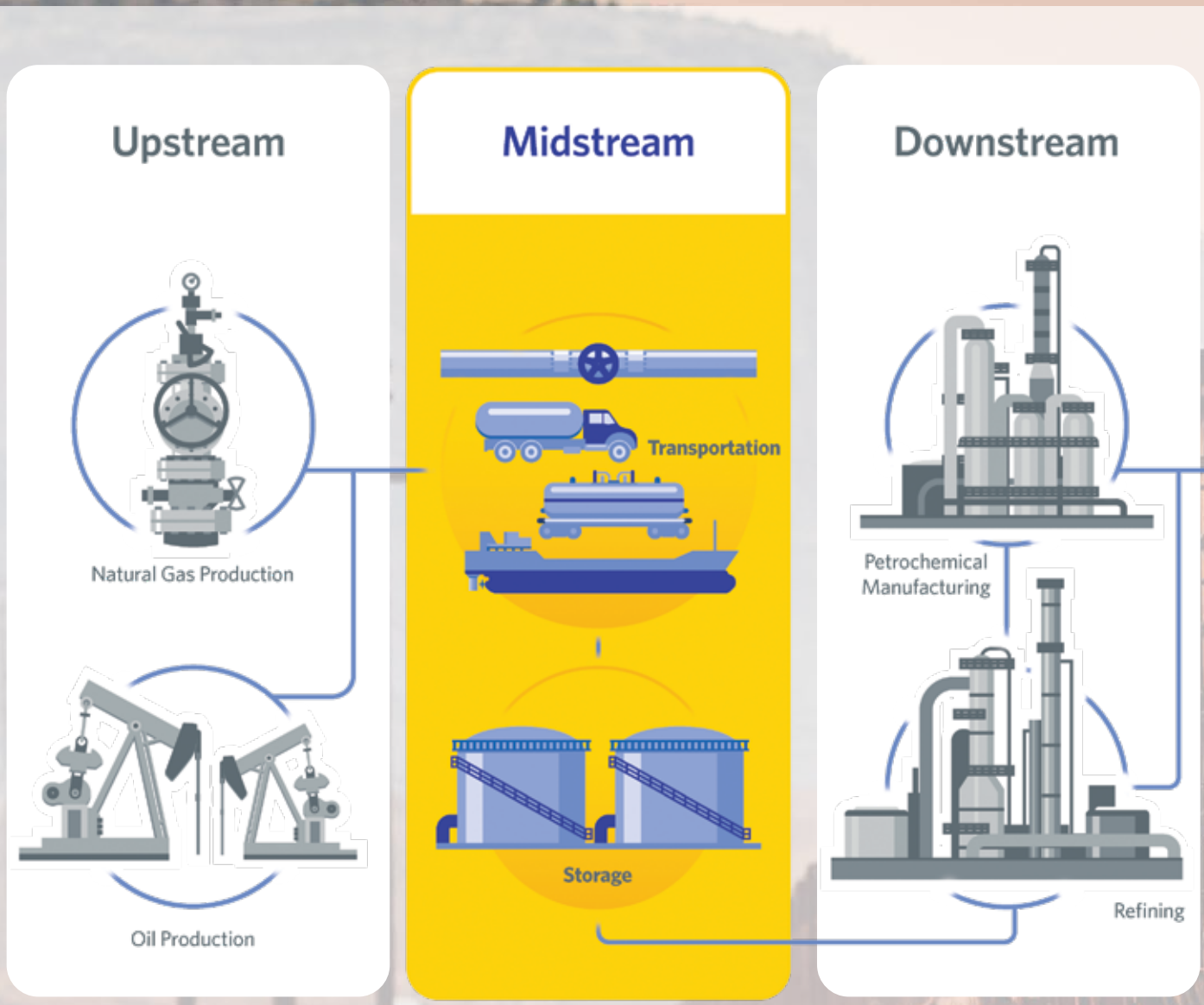
AFPM will continue to bring industry expertise, practical solutions and a commitment to progress to every stage of the global plastics dialogue. As negotiations evolve, we remain focused on advancing policies that reduce waste, support innovation and build a more circular future for plastics—at home and around the world.

Midstream

Midstream

The U.S. midstream sector keeps America moving and is critical to our nation's energy reliability, affordability and economic growth. Its network of pipelines, ports, highways, railroads and storage facilities safely and efficiently transport and store the feedstocks and finished products that power refining, petrochemical operations and our broader economy.

AFPM members invest heavily each year to expand and modernize this infrastructure, strengthening the supply chain and ensuring access to affordable fuels and products. As demand shifts and global dynamics evolve, continued investment, regulatory certainty and streamlined permitting remain critical to maintaining energy security and competitiveness.




Midstream
Transportation
Storage
Marketing &
Consumers
Markets and Products

Midstream Transportation Infrastructure

The midstream sector encompasses an extensive network of roads, railways, pipelines, ports, waterways and other infrastructure; each playing a vital role in transporting energy and industrial materials across the nation:

Pipelines

Across the United States, 230,000 miles[17] of pipeline transport crude oil, refined products, CO_2 and NGLs—moving raw materials from production areas to refineries and petrochemical plants and delivering finished products to consumers.

Rail

There are 140,000 miles of railway tracks and 1.7 million freight rail cars in the United States.[18] Rail cars move crude oil, NGLs, fuel components, refined products and plastics pellets from areas not served by pipelines and where pipeline capacity is inadequate.

Roads

There are 4.2 million miles of public roadway in the United States, of which only 2.8 million miles are paved.[19] These roadways support truck shipments of fuels over the "final mile," from regional storage terminals to retail outlets, and from heating oil and propane depots directly to homes and businesses.

Storage

1.9 billion barrels of tankage is used to store crude oil, NGLs and refined products at regional terminals along the supply chain.[20] These storage terminals facilitate transferring products from one mode to another and from one owner to another.

Inland Waterways

12,000 miles of inland and intercoastal waterways, 13,000 miles of inland channels,[21] and 926 coastal and inland ports[22] facilitate domestic fuel movements and provide access to global import and export markets.

Waterways are large routes like rivers, canals or coastlines that boats can travel on.

Channels are the smaller paths within those waterways that are deep and safe enough for navigation.

The **"final mile"** refers to the last leg of the supply chain, where goods are transported from a distribution center or hub to the end customer's location, such as a home or business.

Keeping Our Pipelines Safe

Every day, pipelines deliver the fuels and raw materials that power our homes, businesses and industries—from gasoline and jet fuel to the building blocks for a variety of products like home building materials and household goods.

Companies take a range of measures to keep pipelines operating safely and reliably—from the earliest planning stages to construction and daily operations. In recent years, these safety measures have become more advanced and innovative. Some companies now use drones and satellites equipped with hyperspectral and electromagnetic sensors to detect potential issues early and prevent leaks. Others use guided wave testing and ultrasonic inspection techniques to detect corrosion sooner than traditional methods allow. One company even invested in aircraft with sensors that track ground elevation and land movement, helping identify spills and other safety risks before they escalate.

Pipelines also operate under strict oversight. State and federal regulations govern how they're built, maintained and monitored—ensuring safe, reliable delivery of energy across the country.

Pipelines are regulated by multiple government agencies:

Pipeline and Hazardous Materials Safety Administration (PHMSA) is responsible for regulating the safety of design, testing, operation, maintenance, construction and emergency response of U.S. oil and liquids pipelines.

Federal Energy Regulatory Commission (FERC) is an independent agency that regulates the interstate transmission of oil, natural gas and electricity.

Various federal regulations also control the permitting of pipelines, including the EPA, the U.S. Fish and Wildlife Service, U.S. Army Corps of Engineers and others.

East Coast Fuel Supply Depends on Gulf Coast Pipelines

Gulf Coast refineries do more than serve their own region—they're a vital source of fuel for much of the Eastern Seaboard, supplying areas from Florida to New York Harbor by marine vessel and through the Colonial and Plantation pipelines. The U.S. East Coast also relies on imports of gasoline, diesel, jet fuel and other refined products. When hurricanes disrupt Gulf Coast operations, the global market has historically stepped in to fill the gap—but it's the Gulf Coast refineries that remain the anchor of East Coast supply.

Investing in Midstream to Meet Tomorrow's Demands

America's energy system depends on modern, resilient infrastructure—especially in the midstream sector, where pipelines, storage and transport systems move fuel and feedstocks across the country. As global markets shift and refining grows more complex, these networks must keep pace with rising demand for liquid fuels, petrochemicals and other essential products. AFPM members are investing heavily to expand and upgrade this critical infrastructure—but outdated permitting processes are slowing progress.

Projects routinely face years of delay navigating overlapping reviews from federal, state and local agencies. Inconsistent standards and litigation can stall construction even after permits are granted. These barriers drive up costs, deter investment and threaten our ability to expand and modernize the infrastructure that powers our economy.

To fix this we need clear rules and faster permitting. Streamlined approvals will help companies innovate, attract capital and deliver affordable energy to American families. Midstream isn't just part of the system—it's the lifeline that keeps fuel flowing and the economy moving.

"When infrastructure stalls, so does progress—streamlined permitting keeps America competitive."

— Rob Benedict
Vice President of Petrochemicals and Midstream
AFPM

Making Permitting Work for Energy Projects

Midstream energy projects require significant investment, coordination and time. Yet even after securing permits, many face long delays due to lawsuits—often filed by parties who are dedicated to opposing all projects related to fossil fuels. These legal hurdles can stall shovel-ready projects for years, leaving vital infrastructure on hold indefinitely. Projects like pipelines, power plants and roads face layers of outdated rules and federal approvals that slow progress and create uncertainty.

To address these challenges, the permitting system must be updated. Builders need certainty, and the permitting system must evolve to meet the demands of a modern energy economy. Federal agencies must follow clear, consistent processes with firm deadlines—and enforce them. Reviews should be limited to strict timelines so agencies can make timely decisions. Without reform, shovel-ready projects will remain stuck in legal gridlock, straining our infrastructure and driving up costs for consumers through higher energy bills, resulting in fewer reliable options and a loss of American competitiveness.

To restore certainty and keep projects moving, Congress should act on the following solutions:

- **Set time limits for legal challenges:** Require lawsuits to be filed within a defined window and only by those who participated in the original permitting process.
- **Fix permits instead of canceling them:** Allow agencies to correct flawed permits quickly, rather than restarting the process—except in cases of serious safety risk.
- **Extend nationwide permits for long-term planning:** Increase the duration of key federal permits from five to ten years to give developers greater certainty to plan, invest and deliver critical infrastructure.
- **Keep projects on track after review:** Require agencies to resolve deficiencies within 180 days, and limit legal challenges to those specific issues.

These changes would enable faster completion of energy projects while maintaining strong protections for communities and the environment.

Building a Safer Future for U.S. Freight Rail

Railroads are a cornerstone of long-distance freight in the United States, especially for moving high-priority and hard-to-ship materials. With more than 140,000 miles of track spanning the country, trains connect ports, cities and industries—driving both domestic commerce and global trade.

Given its critical role, rail safety is a shared responsibility that demands constant vigilance and innovation. Fuel and petrochemical shippers have stepped up, investing hundreds of millions of dollars to modernize more than 110,000 tank cars. These upgrades have paid off. Since 2013, the risk of a hazardous material release from flammable liquid tank cars has dropped by 85 percent.[23]

But safer tank cars are only part of the solution. Track problems—like broken rails and misaligned switches—are the top cause of train accidents, especially derailments, which make up about 61 percent of all cases.[24] To combat this, railroads have poured resources into infrastructure improvements, significantly cutting derailments over the past decade. The combined efforts of shippers and railroads are making a real impact, and their continued collaboration will be key to building an even safer, more resilient rail system.

With more than **140,000 miles** of track spanning the country, trains connect ports, cities and industries—driving both domestic commerce and global trade.

When Railroads Shrink, Costs Climb

In 1980 over 30 Class I freight railroads crossed the country offering shippers choice, competition and reliable rail service. Today the number of Class I railroads has fallen to just six[25] with the top four controlling 90 percent of all freight rail traffic. Two of those four railroads (Union Pacific and Norfolk Southern) are pursuing a merger and if this proposed merger is approved, five major carriers would serve the entire nation. For fuel and petrochemical manufacturers, this trend underscores the importance of ensuring strong, reliable competition in the rail sector.

Roughly three-quarters of shippers are "captive," relying on a single railroad for service. Limited rail competition has contributed to rising rates, declining service quality and fewer options. Since 2004, freight rail rates have climbed 44 percent—more than twice the rate of inflation—while railroads' operating costs have risen just eight percent.[26] At the same time, shippers have faced service cuts and unexpected fees.

A competitive freight rail system is essential to keeping service reliable, affordable and responsive. When shippers have more than one transportation option, they gain better service and greater flexibility. Ensuring robust competition in the rail sector strengthens supply chains and delivers meaningful advantages for manufacturers, consumers and the broader U.S. economy.

Ports are America's Lifeline

U.S. ports are critical to the refining and petrochemical industries. Ports enable energy growth and are a magnet for investment in facilities, innovation and jobs. They serve as vital gateways for trade, keeping goods moving efficiently and fueling economic growth. Any disruptions in our nation's ports can ripple through the entire U.S. supply chain and energy distribution.

With 926 coastal and inland ports across the country, the United States relies heavily on its maritime infrastructure. Among them, the five largest ports for petroleum and petrochemical imports and exports are (ranked by volume, infrastructure and strategic significance):

1. **Port of Houston (Texas)**

   Home to the nation's largest petrochemical complex, the Houston Ship Channel handles massive volumes of crude oil, refined products and chemicals.

2. **Port of South Louisiana**

   Located between New Orleans and Baton Rouge, this port leads in total tonnage and is a key artery for refined products and chemical exports.

3. **Port of Corpus Christi (Texas)**

   The top U.S. crude oil export gateway, Corpus Christi has rapidly expanded its infrastructure and consistently posts record volumes.

4. **Louisiana Offshore Oil Port (LOOP)**

   The only deepwater port in the United States capable of handling ultra-large crude carriers, LOOP plays a critical role in offshore oil imports and storage.

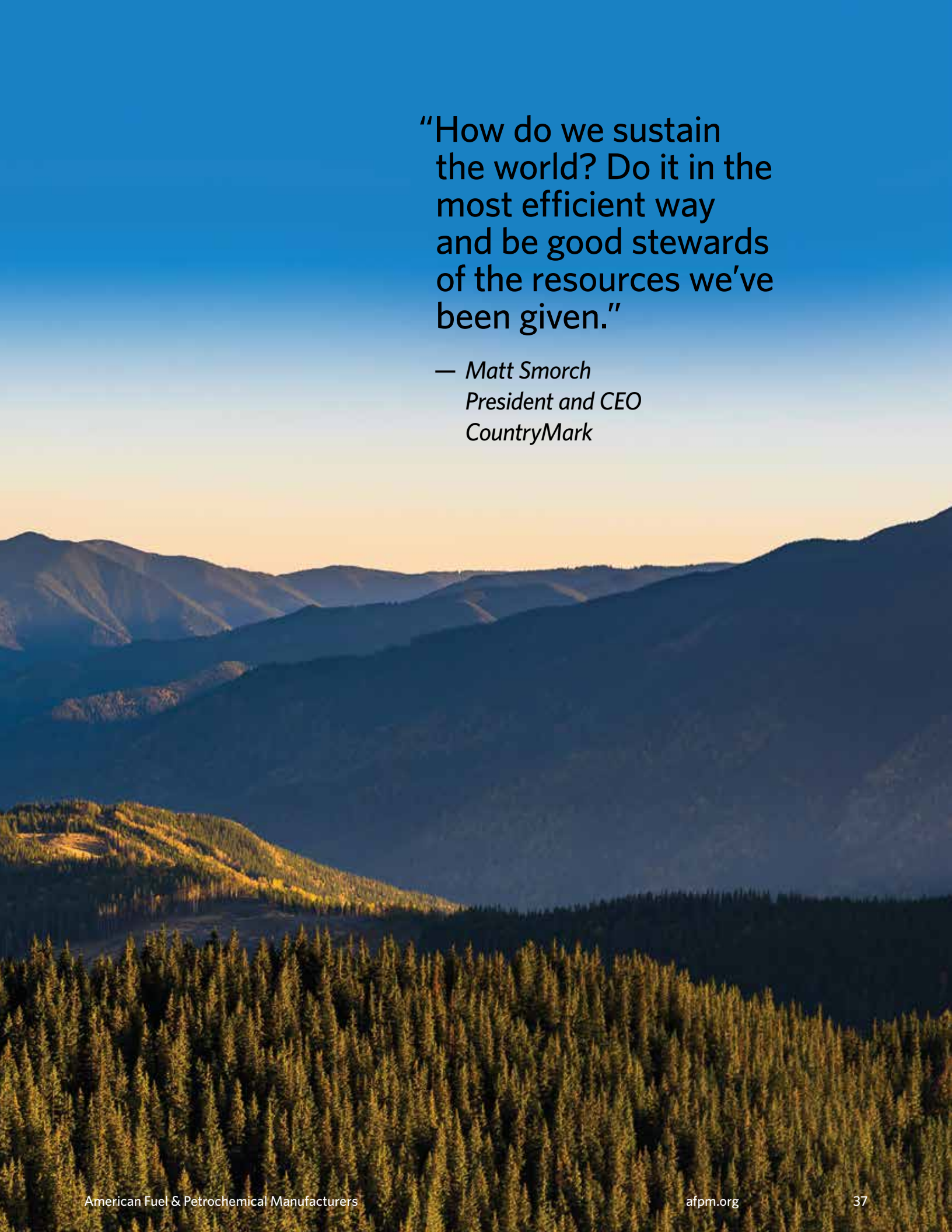
5. **Port of Beaumont (Texas)**

   A major Gulf Coast hub for petroleum and petrochemical shipments, Beaumont supports both domestic distribution and international exports.

Environmental Stewardship

Environmental Stewardship

AFPM members are investing billions in advanced technologies and renewable fuel production to lower carbon emissions, conserve water and protect land. These innovations are transforming how fuels and materials are made, making processes cleaner and more resource conscious. Guided by experts in environmental science, public health and engineering, companies are embedding environmental performance into everyday decisions—taking measurable steps to reduce emissions, minimize waste and support the communities where they operate.



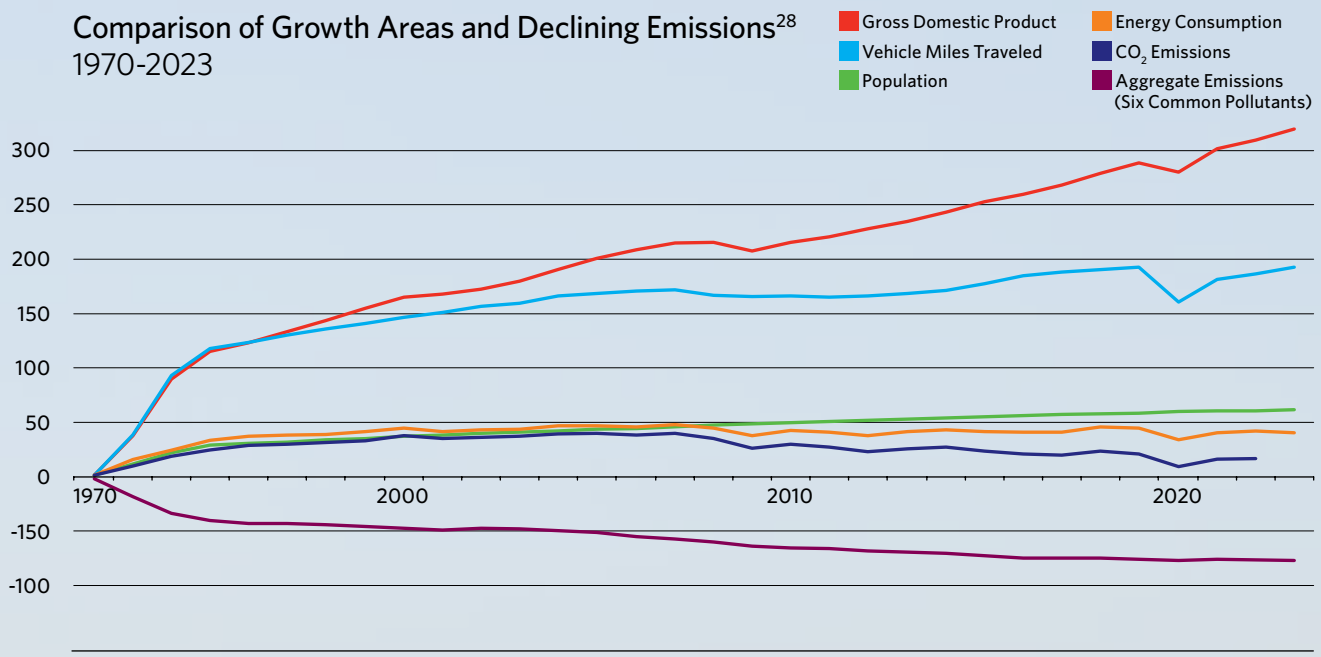
"How do we sustain the world? Do it in the most efficient way and be good stewards of the resources we've been given."

— *Matt Smorch*
President and CEO
CountryMark

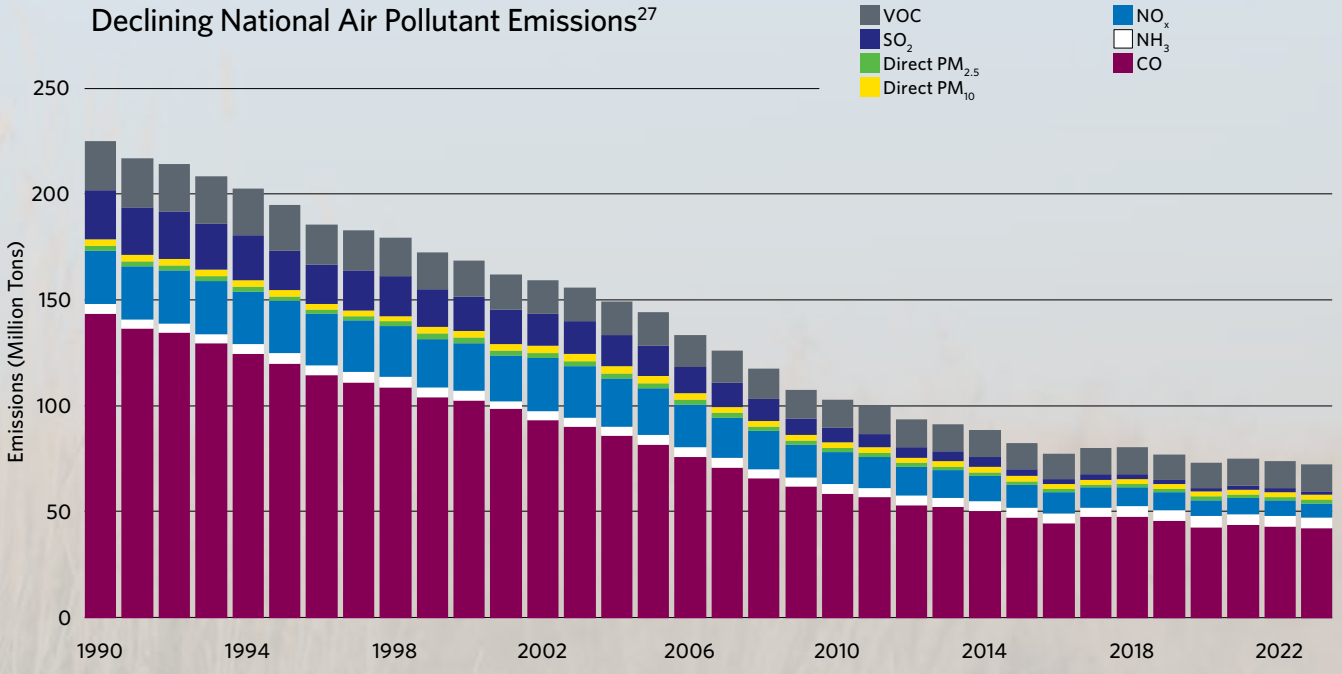
Air Quality Progress

Over the past five decades, the United States has achieved remarkable improvements in air quality while sustaining robust economic growth. Between 1970 and 2023, the combined emissions of the six common pollutants ($PM_{2.5}$ and PM_{10}, SO_2, NO_x, VOCs, CO and Pb) dropped by 78 percent. This progress occurred while U.S. economic indicators remain strong. During this period, the Gross Domestic Product (GDP) grew 321 percent, and the U.S. population increased by 63 percent, which subsequently increased energy consumption (42 percent) and vehicle miles traveled (194 percent).

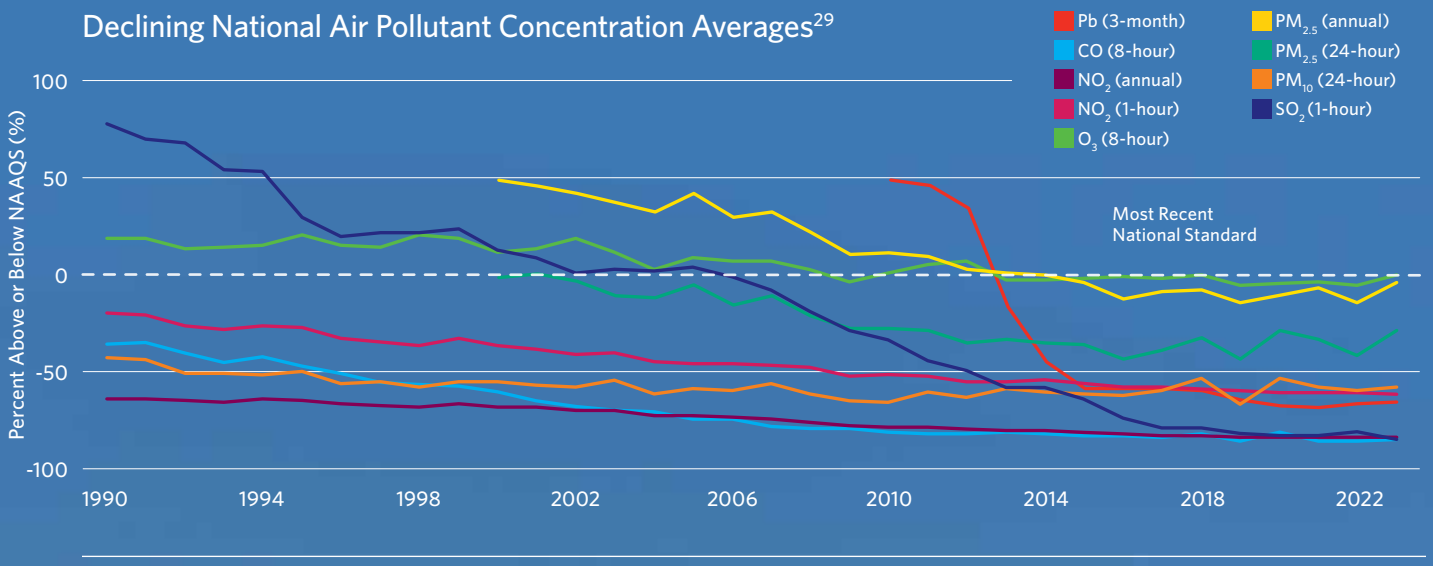
Comparison of Growth Areas and Declining Emissions[28]
1970-2023



Declining National Air Pollutant Emissions[27]



Declining National Air Pollutant Concentration Averages[29]



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Member Achievements

Air Quality Improvements

AFPM members are making major investments to reduce emissions from their facilities while continuing to supply essential products. Through advanced technologies, innovative applications and long-term operational improvements, companies are lowering air pollutants and enhancing environmental performance across the industry.

- Total reportable emissions of VOCs, sulfur oxide and nitrogen oxide decreased by roughly 25 percent at **ExxonMobil**'s operated assets from 2016 to 2024.[30]
- Since 2019, **ONEOK** has reduced absolute methane emissions from its Scope 1 operations by about 57 percent by leveraging advanced methane emissions detection technologies such as optical gas imaging cameras, drones, satellites, photoionization detectors, flame ionization detectors and ultrasonic technology; implementing methane best management practices and eliminating methane emission sources in its operations.[31]
- **Phillips 66** developed an innovative application that tracks abnormal methane emissions all the way from detection through resolution. The Methane Event Management System streamlines and standardizes pipeline leak data management from multiple sources, including manual inputs, aerial surveys and satellite information.[32]
- **PBF**'s facilities use state-of-the-art pollution control equipment like carbon monoxide boilers, wet gas scrubbers and tail gas treating units on sulfur recovery units to reduce emissions.[33]
- **Boardwalk Pipeline** has reduced methane emissions by 68 percent from 2021 as a result of modifying fuel systems on key reciprocating equipment, performing annual leak surveys along its pipelines with the aid of fixed-wing planes and helicopters, and using optical gas imaging cameras to scan all natural gas piping and components at its compressor stations to visualize leaks.[34]

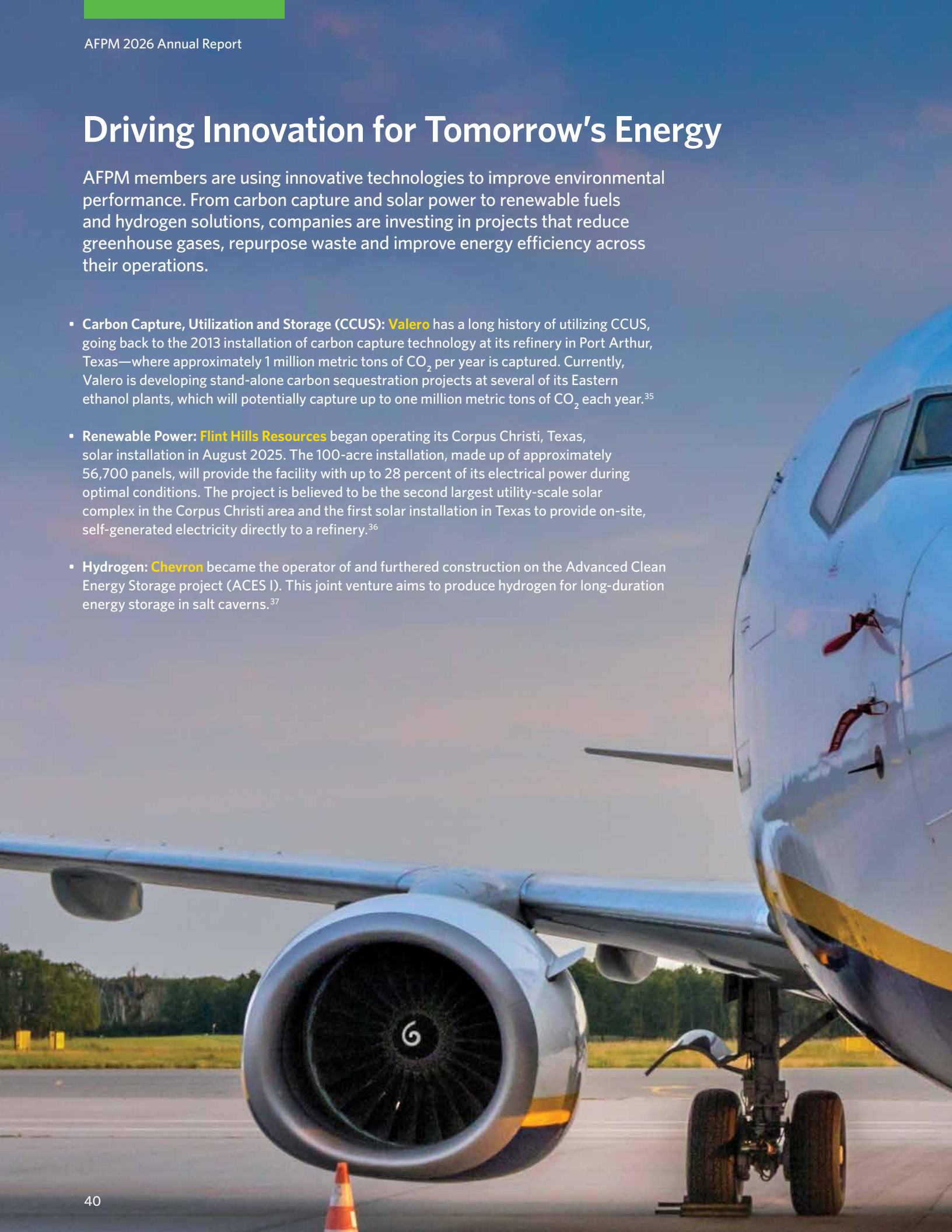
Driving Innovation for Tomorrow's Energy

AFPM members are using innovative technologies to improve environmental performance. From carbon capture and solar power to renewable fuels and hydrogen solutions, companies are investing in projects that reduce greenhouse gases, repurpose waste and improve energy efficiency across their operations.

- **Carbon Capture, Utilization and Storage (CCUS): Valero** has a long history of utilizing CCUS, going back to the 2013 installation of carbon capture technology at its refinery in Port Arthur, Texas—where approximately 1 million metric tons of CO_2 per year is captured. Currently, Valero is developing stand-alone carbon sequestration projects at several of its Eastern ethanol plants, which will potentially capture up to one million metric tons of CO_2 each year.[35]

- **Renewable Power: Flint Hills Resources** began operating its Corpus Christi, Texas, solar installation in August 2025. The 100-acre installation, made up of approximately 56,700 panels, will provide the facility with up to 28 percent of its electrical power during optimal conditions. The project is believed to be the second largest utility-scale solar complex in the Corpus Christi area and the first solar installation in Texas to provide on-site, self-generated electricity directly to a refinery.[36]

- **Hydrogen: Chevron** became the operator of and furthered construction on the Advanced Clean Energy Storage project (ACES I). This joint venture aims to produce hydrogen for long-duration energy storage in salt caverns.[37]



- **Renewable Diesel:** In July 2025, **CountryMark** announced the completion of a $100 million-plus refinery upgrade in Mount Vernon, Indiana. These upgrades are to improve its diesel fuel quality and increase its diesel fuel production capabilities through ISO Technology.[38]

- **Sustainable Aviation Fuel (SAF):** **Flint Hills Resources** and **Delta Air Lines** are developing a facility to blend up to 30 million gallons of neat SAF in early 2026 at Flint Hills Resources' Pine Bend refinery in Rosemont, Minnesota. It will be the first facility between the coasts to blend neat SAF with conventional jet fuel, with the blended fuel being transported through Flint Hills' pipeline to Minneapolis-St. Paul International Airport.[39]

- **Renewable Natural Gas (RNG):** Since **Marathon Petroleum** acquired a 49.9 percent stake in LF Bioenergy—a renewable energy developer that builds, owns and operates facilities that turn organic dairy farm waste into RNG—the company has initiated commercial operations at five facilities across the U.S. and has two additional sites under construction.[40]

Energy Efficiency

Across the country, companies are improving energy use and reducing emissions through smarter technologies and better processes. By upgrading equipment, optimizing operations and adopting low-power sources, these efforts are helping to lower environmental impact while supporting safe, reliable performance.

- **Energy Transfer** used dual drive technology, a one-of-a-kind compression technology that allowed it to operate its units using electric power approximately 80 percent of the time, thereby reducing emissions by 789,908 tons of CO_2 each year.[41]
- **Ketjen** has worked to improve the energy efficiency of the process to produce Fluid Catalytic Cracker (FCC) catalyst. The spray dryer, which is used to form the FCC particles from a slurry of mixed ingredients and water, is the largest consumer of energy, with the evaporation of the water mainly determining the energy requirement. At Ketjen's Bayport site, in Pasadena, Texas, the spray dryer auto-dilution implementation has enhanced the energy efficiency of its spray dryer by increasing the density of material feeding the unit by an average of 2.5 percent, leading to a 0.7 percent reduction in natural gas use and its associated CO_2 emissions.[42]
- **LyondellBasell's** Value Enhancement Program (VEP) empowers employees to pursue opportunities to save energy and costs through large- and small-scale projects. In 2024, VEP projects yielded an estimated annual GHG emissions reduction of nearly 310 Kt of CO_2e and an estimated annual energy savings of over 5 million gigajoules.[43]

Water Management

Refiners and petrochemical facilities are discovering new ways to reduce freshwater use and recycle the water that is used to produce fuels and petrochemicals. By recycling wastewater, our member companies can repurpose it for various uses, reinforcing their commitment to responsible resource management.

- **Chevron's** Richmond, California, refinery is the largest industrial user of recycled water in the San Francisco Bay area, using more than 7 million gallons of recycled water a day.[44]
- **Ecolab** helped its customers conserve more than 226 billion gallons of water in 2024, while also helping them conserve over 65 trillion BTU of energy.[45]
- In 2024, 93 percent of **Phillips 66's** treated water was recycled for reuse at its facilities, with over 2 billion gallons of water being collected and treated through its remediation systems for reuse. Phillips 66 also conserved over 650,000 gallons of water through its innovative tank cleanout methods.[46]
- **TPC Group's** recent investment to reduce unnecessary boiler blowdowns has the potential to save 19,136,000 gallons of water each year.[47]

Waste Reclamation and Recycling

AFPM members are advancing waste reduction by recovering valuable materials and improving recycling across refining operations. Through smarter resource use and partnerships with local recyclers, companies are diverting more waste from landfills and reducing the need for new raw materials. These efforts support cleaner operations and contribute to a more sustainable future for the industry.

- In 2024, more than 39 million pounds of **Valero's** catalysts were recycled to recover valuable metals. As a result of recycling efforts like these, 95 percent of all of Valero's refinery hazardous and exempted waste was recycled in 2024.[48]
- **ExxonMobil** diverted from landfills more than 95 percent of waste produced in its global network of lubricants blending and packaging plants in 2023 and 2024.[49]
- **PBF** recycles catalysts used in the refining process, with reclaimers recovering precious or rare earth metals such as nickel, cobalt, platinum and molybdenum, reducing the need for these metals to be mined and eliminating these materials from landfills.[50]
- The amount of **LyondellBasell's** waste diverted from disposal increased by 120% in 2024 as a result of LyondellBasell's commitment to effective waste management and recycling for non-hazardous waste streams. Since 2021, its overall generated waste has decreased by roughly 30%.[51]
- **INEOS Olefins & Polymers'** Battleground site in Houston, Texas, made progress in reclassifying its hexane waste stream so the waste can be valorized and sold as fuel. After its completion in 2025, the project is expected to reduce hazardous waste by roughly 500 metric tons a year at the site.[52]

Conservation and Habitat Restoration

Refineries and petrochemical companies are taking steps to protect and improve the land and waterways near their operations. Through thoughtful planning and ongoing care, they support healthy ecosystems and work to balance energy production with environmental responsibility.

- **Valero** is continuing its $1 million partnership with the Pontchartrain Conservancy in support of the Conservancy's five-year reforestation project, with volunteers from Valero's Meraux and St. Charles Refineries planting 1,150 trees in the Pontchartrain Estuary during the 2024-2025 planting season. Thus far, more than 52.5 acres had been restored in and around the St. Charles and St. Bernard parishes.[53]
- In 2024, **Dow** worked with Ducks Unlimited to restore key acreage in one of Michigan's largest managed wetland complexes in the Shiawassee National Wildlife Refuge to improve water quality, increase biodiversity and enhance flood storage capacity.[54]
- **Plains All American Pipeline's** conservation program seeks to enhance wildlife habitats while supporting compatibility with essential infrastructure operations. By identifying and implementing opportunities for ecological stewardship at sites like Cushing, Oklahoma, the program integrates habitat creation into routine facility management. These efforts contribute to sustainability outcomes by balancing operational needs with the preservation of native species and their environments.[55]
- During a routine right-of-way patrol of Crum Creek in Nether Providence Township, Pennsylvania, MIPC (**Monroe Energy's** pipeline subsidiary) discovered an eroded streambank caused by an upstream dam in disrepair. Working with the Pennsylvania Department of Environmental Protection, MIPC rebuilt the streambank from the dam past the washout, filling the area with new soil and plants to help the creek bank thrive.[56]

U.S. pipeline companies are committed to environmental care, blending energy transport with land restoration.

Pipeline Companies Champion Conservation

U.S. pipeline companies are committed to environmental care, blending energy transport with land restoration.

Matt Isom, Plains All American's Vice President of Engineering, exemplifies this in West Texas, where pipelines aid his efforts to restore native grasslands. "At Plains, we maintain pipelines to protect the environment and communities," Isom says. ONEOK restored nearly 400 acres of habitat in 2023, using careful soil preservation and native seed mixes. Marathon Petroleum's MPLX partners with Texan by Nature on projects like dark-sky lighting, or outdoor lighting designed to minimize light pollution, and playa restoration to boost conservation.

Health and Safety

Health and Safety

Safety underpins everything we do. Refining and petrochemical manufacturers and midstream companies prioritize protecting employees, contractors, communities and the environment. Our members continually look for ways to enhance safety and know that sharing knowledge is one of the most effective ways to improve performance. This commitment and teamwork have made our industries leaders in safety—consistently earning top workplace ratings year after year.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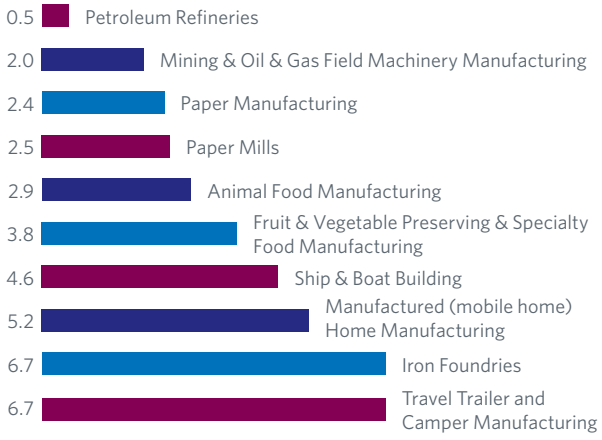
Leading the Way in Safety Among U.S. Manufacturers

Nothing is more important to the refining and petrochemical industries than safety. AFPM member companies maintain strong safety records and continually work to improve performance to protect people, communities and the environment.

According to the Occupational Safety and Health Administration (OSHA) and the U.S. Bureau of Labor Statistics (BLS), which track workplace injuries and illnesses across nearly 500 manufacturing sectors, refining and petrochemical companies consistently rank in the top tier for safety performance. Injury and illness rates in these industries are lower than most other sectors, including mining, food, ship building and paper. When sectors beyond manufacturing are included, refining's rate is also below those in business services, agriculture and air transportation, among many others.

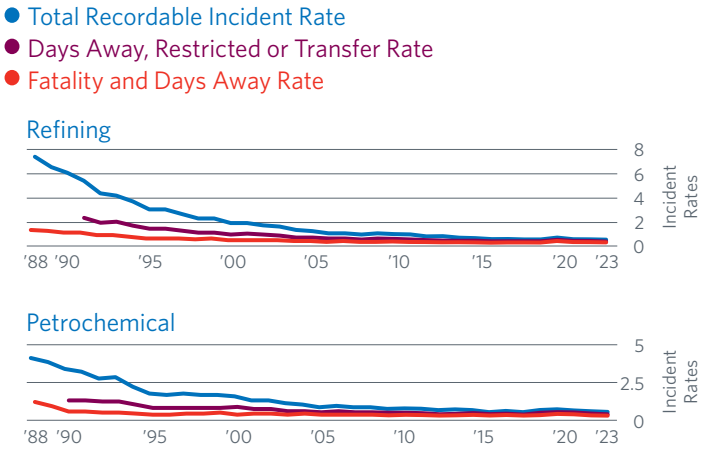
Incident Rates of Non-Fatal Injuries or Illnesses Among Manufacturing Sectors



Source: U.S. Bureau of Labor Statistics, (2023 data)

Injury & Illness Incident Rates

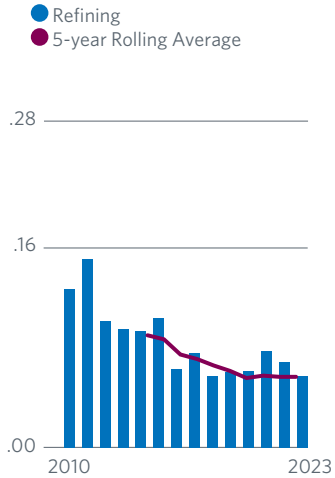
Radically Reduced Injuries



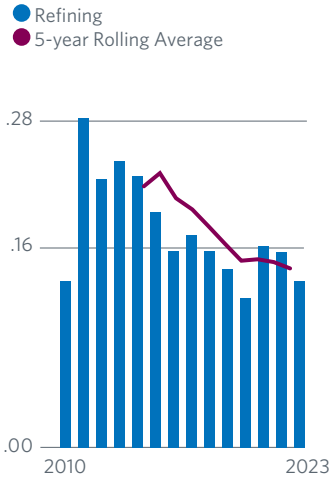
Source: U.S. Bureau of Labor Statistics, (2023 data)

Refining Process Safety Event Rates

Tier 1 Refinery Process Safety Event Rates

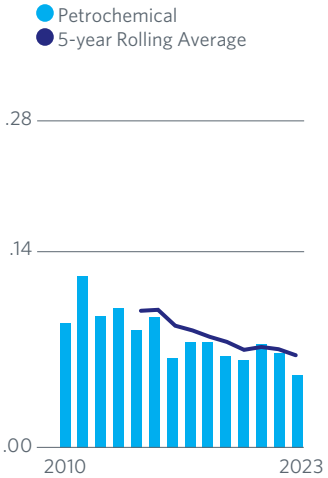


Tier 2 Refinery Process Safety Event Rates

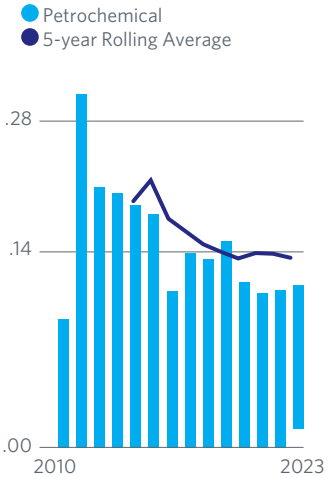


Petrochemical Process Safety Event Rates

Tier 1 Petrochemical Process Safety Event Rates



Tier 2 Petrochemical Process Safety Event Rates



Collaboration: A Cornerstone of Safety and Progress

Safety in the refining and petrochemical industries is built on a comprehensive foundation; one that prioritizes both process safety and occupational safety. But true progress happens when we go beyond individual efforts and work together. Collaboration is essential to the success of every project and organization.

By connecting professionals from different companies, disciplines and backgrounds, we create space for shared learning and innovation. Our collaborative programs bring people together to exchange ideas, advance technologies and strengthen the safety, reliability and sustainability of our industries. We also work with key government agencies, including OSHA, the Chemical Safety Board (CSB) and EPA, to share information and continuously raise the bar for safety performance.

Operational Excellence: Strengthening Safety and Standards

AFPM members are committed to safety and continuous improvement, working together across the refining and petrochemical sectors to share successful practices and raise industry standards. AFPM supports these efforts through targeted programs in process safety, occupational safety and workforce development. Our Operational Excellence (OPEX) Program integrates technical and safety initiatives to help members enhance practices, improve efficiency and cultivate a culture of leadership—advancing safer workplaces, stronger teams and consistent performance across the industry.

Safeguarding People and Processes

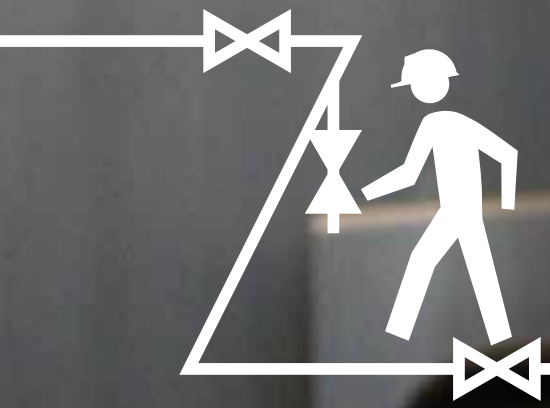
Our industries' comprehensive approach to safety includes a focus on process safety and occupational safety:

Process Safety

is a management system that prevents any unintended release of energy within refining and petrochemical facilities by applying good operating, engineering, maintenance and other practices to manufacturing processes.

Occupational Safety

refers to the protection of the safety, health and welfare of workers.



Advancing Process Safety

Advancing Process Safety (APS) is AFPM's flagship safety program. AFPM, in collaboration with American Petroleum Institute (API), promotes collaboration across industries and continuously improves safety through data collection and opportunities to share experiences and knowledge.

Created more than a decade ago to improve process safety at facilities, the APS programs contribute to improved performance by developing tools and resources for our industries to prevent process safety events. This voluntary program has grown to include a suite of resources that facilitate the sharing of learnings and information, and includes:

APS Programs

- **Walk the Line:** AFPM's human and organizational performance program provides operators with practical tools and resources to prevent common incidents, aid workplace performance and strengthen safety overall.
- **Process Safety Regional Networks:** Seven regional information-sharing networks that enable process safety professionals to collaborate at the site and association level to improve overall process safety performance.
- **Process Safety Site Assessment Program**: AFPM collaboration with API to facilitate rigorous, independent third-party assessments of written programs and operations that help facilities prevent process safety events.
- **Hazard Identification/Practice Sharing Subgroup:** AFPM member group that develops hazard identification and practice share documents addressing common industry hazards and good industry practices.
- **Mechanical Integrity Subgroup:** AFPM/API member group that develops resources to help members keep their equipment and systems working safely and reliably.
- **Human & Organizational Performance Subgroup:** AFPM/API member group that develops information and tools to improve human performance in operations and aids in reducing the likelihood and consequences of human errors.
- **Industry Learning & Outreach Subgroup:** AFPM member group that collects and analyzes data to identify opportunities for improvement for APS and conducts monthly industry webinars.

Technical Committees

AFPM's Technical Committees provide a forum for knowledge sharing and identifying learning opportunities at our conferences, webinars and other events. The committees focus on a range of topics that include manufacturing safety and health, immersive learning and training, reliability and maintenance planning, automation and operations technology, fluid catalytic cracking (FCC), hydroprocessing, crude and coking, gasoline processes, sustainability technologies and hydrofluoric acid alkylation.

Regional Networks

The AFPM Regional Networks fill an essential role, bringing site-level practitioners together to network and share events, learnings and good practices. The regional networks focus on process safety, occupational safety and hydrofluoric acid alkylation operations. Events and meetings are held virtually and in the following regions: Central States, East Coast, Midwest, Eastern Gulf Coast, Rocky Mountain, Pacific Coast and Texas Gulf Coast.

FCC Process Safety Resources and Regional Meetings

The FCC Committee develops resources for industry-based learnings from recent FCC incidents. This group has developed webinars, conference sessions and FCC process safety documents. Most notably, the committee delivers regionally based interactive and experiential one-day training workshops at operating sites throughout the United States.

Safety Bulletins, Hazard ID Documents, Practice Sharing Documents

The AFPM APS Program has developed a means to share important process safety information broadly with our members. Since the program's beginning, hundreds of documents have been created to support AFPM members and include safety bulletins, a compilation of similar process safety incidents and their learnings, hazard ID documents that list hazard considerations for specific tasks and practice sharing documents provided by member companies for the benefit of improving site practices industrywide.

Live Events and Webinars

AFPM's live events and webinars deliver cutting-edge industry insights through engaging, interactive experiences that spark meaningful connections among attendees, subject matter experts and exhibitors. Safety takes center stage at several key gatherings each year—including the AFPM Safety Conference, Summit, Annual Meeting, Training Forum and Walk the Line Workshops—where best practices and innovations are front and center. Beyond our in-person programming, we offer a year-round lineup of webinars covering timely technical and safety topics. Recent sessions have explored everything from hydrogen production and artificial intelligence (AI) to advanced catalyst solutions.

Occupational Safety Programs

AFPM Occupational Safety programs and trainings are geared toward preventing injuries in refining and petrochemical facilities. We use incident data provided by our members to identify and address opportunities for industrywide improvement and then build and share tools that address those issues.

Our Occupational Safety Regional Networks facilitate information sharing, including lessons learned to improve the overall safety of the industries. Recently, we focused on good energy isolation practices to minimize unplanned or uncontrolled releases of electrical, mechanical, hydraulic, pneumatic, chemical, thermal and other energy sources, and ultimately reduce injuries and loss of primary containment events.

Strengthening FCC Safety

FCC units play a vital role in refining by converting heavy hydrocarbons into valuable products such as gasoline and diesel. After two major incidents prompted investigations by the CSB, the AFPM FCC Committee responded by launching regional workshops that deliver accessible, practical guidance on FCC safety practices.

These workshops bring FCC operators together with subject matter experts to share expertise, explore innovative strategies and partner on improving operations. Participants engage in discussions about communication, monitoring tools, startup and shutdown procedures, emergency protocols and risk identification. They return to their facilities with actionable ideas that drive implementation and continuous improvement.

After attending a March 2025 workshop in Richmond, California, CSB staff affirmed that the workshop content addresses key safety concerns and offers practical solutions to real-world refining challenges. This recognition highlights the industry's shared commitment to continuous improvement and operational safety. More importantly, the CSB formally recognized AFPM's proactive efforts by updating its recommendation from the Husky Energy Superior investigation to "Closed—Acceptable Alternative Action." This designation confirms that AFPM's approach not only fulfilled the CSB's safety goals—it surpassed them, incorporating enhancements that went beyond the original recommendation.

With 85 FCC units operating nationwide, the FCC Committee strives to reach operators at every site. So far, the workshops have engaged 741 operators from 76 sites and the committee expects full participation before the end of 2026. To further support industrywide safety improvements, AFPM launched a member- accessible webpage (QR code) that offers extensive resources on FCC process safety.

Strengthening Safety Through Contractor Collaboration

The refining industry depends on a highly skilled workforce of both owner-operator employees and contractors, each playing a vital role in ensuring safe, reliable operations. Recognizing this, AFPM's Safety & Health Committee has prioritized deeper engagement with the contractor community, broadening access to safety programs and fostering stronger collaboration across the industry.

Recent efforts have expanded contractor participation in AFPM's Occupational Safety Regional Networks and enhanced the exchange of safety resources, including OPEX insights and OSHA's National Stand-Down to Prevent Falls materials. These efforts enhance our longstanding Walk the Job practice, which is a joint effort of operators, contractors, craft and maintenance teams to build accountability, boost safety awareness and help prevent serious injuries. In addition, dedicated operator-contractor sessions and panels at the Safety Conference have further strengthened dialogue and shared learning.

AFPM also continues to honor excellence in contractor safety performance. Last year, 329 Contractor Safety Achievement Awards were presented, celebrating the outstanding contributions of contractors to member company operations.

This vital segment of our workforce brings valuable expertise and on-the-ground perspective that enriches our safety initiatives, informs conference programming and strengthens participation in occupational safety efforts across the board.

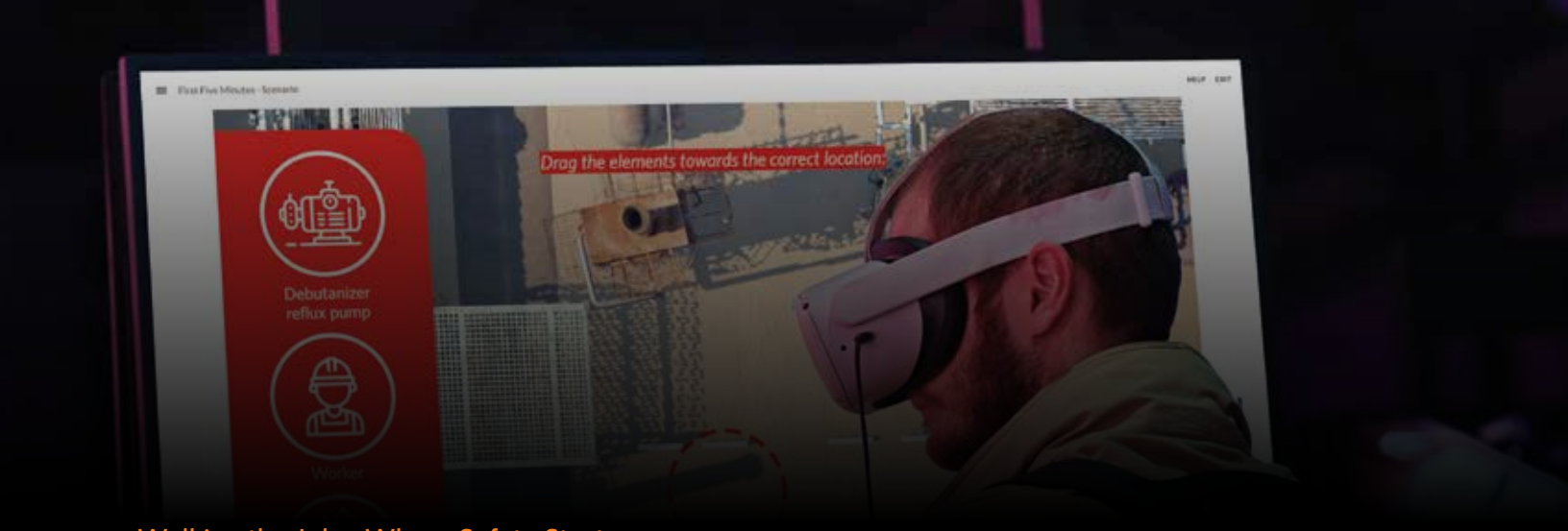
Standing Together to Prevent Falls

Falls from height—defined as four feet or higher—remain one of the leading causes of workplace injuries and fatalities across the refining and petrochemical sector, according to OSHA, the Bureau of Labor Statistics and AFPM's Incident Classification Matrix. This persistent risk demands focused attention.

In 2014, OSHA launched the National Safety Stand-Down to Prevent Falls Week, a dedicated campaign to raise awareness and promote best practices for fall prevention. The initiative encourages companies nationwide to pause work and engage employees in conversations, training and demonstrations that reinforce safe behaviors.

AFPM and its Safety & Health Committee proudly participate, sharing practical resources and safety protocols across the industry. Member companies contribute materials focused on inspecting fall protection equipment, securing tools and materials, and practicing safe techniques when climbing, descending and working from ladders.

Stand-Down is more than a moment of reflection—it's a call to action. By spotlighting fall hazards and reinforcing prevention strategies, the industry takes a united step toward safer workplaces for all.



Walking the Job—Where Safety Starts

It's a long-standing practice to Walk the Job, and in the refining and petrochemical industries, it's a successful practice that can reduce human error.

Walk the Job is a joint walkthrough that brings operators, contractors and craftspeople together to align on scope, verify equipment and identify potential hazards before any work begins. In high-risk environments where multiple companies, procedures and energy isolation systems intersect, real-time coordination is critical. Walk the Job ensures that everyone is speaking the same language—literally and operationally. It's a moment to confirm work scope, personal protective equipment needed and ensure the right tools are in hand for the task ahead.

Because these walkthroughs have a long history of helping to ensure safe work, the concept of joint job walks—or joint job site visits—is not new to the industry. Walk the Job helps improve process and personal safety through a six-step approach focused on clear communication, proper equipment preparation, defined scope and hold points, correct tools, verified energy isolation, and confirmed completion with permit closure—all reinforcing No Walk, No Work.

Celebrating Safety Leadership

AFPM's highly regarded Annual Safety Awards recognize the facilities that go above and beyond to protect their people and communities. These awards highlight the best in the refining and petrochemical industries that treat safety as a value. The Distinguished Safety Award is the highest honor given to facilities that show outstanding performance, strong safety programs and leadership that sets the standard for others to follow.

The 2025 DSA recipients:

- ExxonMobil Product Solutions Company
  Baton Rouge Plastics Plant, Louisiana
- Marathon Petroleum Corporation
  El Paso Refinery, Texas
- Marathon Petroleum Corporation
  Kenai Refinery, Alaska
- Marathon Petroleum Corporation
  Michigan Refining Division

"Safety isn't just a priority—it's our foundation. The petrochemical and refining industries have set a high bar, not because we are required to, but because we know that the well-being of our workforce and communities depends on it. Thanks to the dedication and resilience of industry professionals, we continue to lead in safety, proving that excellence is not just an aspiration but a daily commitment."

—Chet Thompson
President and CEO
AFPM

Immersive Learning Programs

AFPM and its Immersive Learning and Training Committee bring people together to create new training tools using virtual reality (VR) and augmented reality. These technologies help improve safety, boost performance and optimize training time across all safety disciplines.

This group created AFPM's first VR training simulation, a powerful tool that replicates the complex process of lighting a fired heater from a cold start. Because this operation can have serious risks if done incorrectly, hands-on field training is often limited. The simulation offers a safe, controlled environment where trainees can practice critical procedures to build skills and confidence. It also helps users prepare for rare but high-stakes scenarios without real-world consequences, leading to better training outcomes and stronger knowledge retention. This innovative tool is an asset for employees at refinery and petrochemical facilities.

Building on that success, AFPM created the Winterization VR simulation, a supplemental training tool that gamifies hazard recognition and preparation for winter, cold or freezing conditions. Trainees experience consequence-based outcomes in a digital environment where they can fail safely, reinforcing key actions in the real world during each phase of winterization. The Winterization simulation complements a suite of tools designed to improve performance during freezing conditions, including a three-episode podcast series, a winterization training video and a set of trivia game questions.

The First Five Minutes: Immersive Training for Emergency Response

The actions taken by facility personnel within the first five minutes of an unintended hazardous release of materials are critical to safe outcomes. To strengthen response during this high-stakes window, AFPM developed a suite of computer-based training tools focused on this critical time that includes a video summary, interactive video and eLearning modules. At the heart of the package is AFPM's first "choose your own adventure" simulation, which allows employees to navigate realistic emergency scenarios, make decisions and see the consequences of their actions in a digital environment. These tools reinforce critical thinking and decision-making skills, offering a memorable hands-on learning experience. The interactive video module—originally in English—now includes Dutch and Mandarin translations, expanding accessibility for member companies. The training package is easily downloaded and integrated into companies' online training platforms.

Security and Emergency Response

Security and Emergency Response

U.S. refiners, petrochemical manufacturers and midstream operators maintain constant vigilance to keep their facilities secure and to protect the people who depend on them. Facing evolving physical and digital threats, they apply a flexible, multi-layered approach to security—combining continuous risk assessment, strong protective systems and close coordination with public-sector partners. Through strict regulatory compliance and a culture of preparedness, these industries ensure the reliability and resilience of America's energy and petrochemical infrastructure.

Enhanced Security Measures for a Resilient Energy Sector

AFPM member companies are deploying cutting-edge systems to reinforce both physical and cyber defenses, backed by strategic coordination that keeps operations resilient. These forward-looking investments anticipate emerging risks, accelerate incident response and safeguard critical infrastructure, enhanced by private–public partnerships that expand intelligence sharing and collaboration.

Strengthening Physical Security

AFPM member companies are deploying advanced technologies to safeguard critical infrastructure from environmental and human threats. Innovations include:

- Smart Drones for Surveillance and Safety: Drones equipped with artificial intelligence (AI) and high-definition imaging monitor facilities, detect anomalies and reduce human exposure to hazardous environments. Counter-Unmanned Aircraft Systems (C-UAS) provide early alerts for unauthorized drones, while new regulations enable autonomous, beyond-visual-line-of-sight flights for pipeline inspections and emergency response.
- Material Advancements: Engineers are developing advanced materials that can withstand extreme conditions, strengthening critical infrastructure against environmental and human threats. These innovations include thermal insulation, corrosion-resistant alloys and carbon fiber composites that protect and reinforce equipment and pipelines.

Unmanned Aircraft Systems: Expanding the Frontiers of Energy Security

Unmanned Aircraft Systems (UAS), or drones, support security and safety efforts across the refining, petrochemical and midstream industries. They enable operators to monitor facilities, detect threats such as vandalism, theft and trespassing, and confirm that only authorized personnel have access. Many sites also use C-UAS detection systems to identify unauthorized drones entering restricted airspace, providing early alerts and reducing reliance on physical security measures like guards and perimeter fencing.

Drones also improve safety by identifying and mitigating risks and limiting human exposure to hazardous environments. They strengthen emergency responsiveness by replacing human observers in dangerous conditions and can detect hazards that humans might miss. Drones can also carry high-definition cameras and night vision capabilities to provide around-the-clock protection.

More recently, companies are enhancing drone monitoring capabilities by introducing artificial intelligence. Through continuous learning, AI distinguishes normal from abnormal conditions, allowing it to spot anomalies at facilities and near pipelines. For example, a drone could identify a hole in a fence and alert teams that an area needs investigation. This technology eliminates hours of manual monitoring, making drone surveillance more efficient and cost-effective.

Additionally, recent advancements in drone regulations lay the foundation for autonomous, beyond visual-line-of-sight flights that further expand drone capabilities. As soon as next year, pilots will be able to use automated systems to fly drones far beyond their line of sight without needing the Federal Aviation Administration's approval. This means that drones can inspect long stretches of pipeline and monitor facilities from a distance. These new capabilities make drones more useful than ever, adding an extra layer of safety and security to operations—the potential applications are nearly endless.

Ensuring Robust Cybersecurity for Our Energy Infrastructure

As digital threats grow more sophisticated, the refining, petrochemical and midstream sectors are stepping up with advanced strategies to protect critical operations. Today, resilience depends on a powerful combination: robust cyber defenses that monitor, detect and deter attacks, and intelligent systems that enable rapid recovery. Together, these capabilities form a comprehensive shield against both virtual and physical risks.

Strategic Protection for a Connected World

AFPM member companies safeguard two critical domains: **information technology (IT), the software, servers, and networks that power business systems; and operational technology (OT), which controls physical equipment and processes**. Protecting both ensures that digital networks and physical infrastructure remain secure and reliable.

Collaboration amplifies these efforts. Industry partners work closely with federal agencies and critical infrastructure stakeholders to anticipate and neutralize disruptions. Compliance with mandates such as the Maritime Transportation Security Act and TSA's pipeline cybersecurity directives reinforces this commitment, while advocacy continues for programs like the Chemical Facility Anti-Terrorism Standards to maintain strong protections.

Innovations Driving Resilience

Companies are investing in cutting-edge tools that make security smarter and faster:

- **Cyber Defense Reinforcement:** Specialized gateways create barriers between operational networks and external threats, allowing outbound monitoring while blocking inbound traffic.
- **Real-Time Analytics and Predictive Monitoring:** Advanced platforms detect anomalies before they escalate, strengthening defenses against cyber intrusions and physical safety risks.
- **Automation for Resilience:** Intelligent flow control systems use sensors and software to respond to disruptions instantly—faster and safer than manual methods.

By combining technology, collaboration and innovation, the energy sector is building a future-ready cybersecurity framework—one that keeps critical infrastructure secure in an increasingly connected world.

Collaborating with Government to Keep Facilities Secure

AFPM and its members combine physical and cyber defenses with strategic coordination to ensure reliable performance. Our proactive approach to physical and cyber security involves working closely with federal partners, including the Federal Bureau of Investigation (FBI), U.S. Coast Guard (USCG), Transportation Security Administration (TSA), Department of Homeland Security (DHS), Department of Transportation (DOT), Department of Energy (DOE) and others—to share intelligence, strengthen protocols and protect critical infrastructure. This collaboration is reinforced through participation in key committees and councils that align industry and government on shared security priorities.

- **Chemical Sector Coordinating Council:** Self-organized and self-governed council that enables critical infrastructure owners and operators, their trade associations and other industry representatives to interact on a wide range of sector-specific strategies, policies and activities to address the critical infrastructure security, and resilience policies and efforts for the chemical sector.
- **Joint Cyber Defense Collaborative (JCDC):** Created by the Cybersecurity and Infrastructure Security Agency to unify cyber defense capabilities from government, industry and international organizations. JCDC reduces cyber risk by coordinating national incident response, facilitating rapid threat information exchange and producing expert cybersecurity guidance through collaborative efforts with federal, industry and international partners. Its structured approach ensures unified action against adversaries and strengthens collective cyber defense.
- **National Maritime Security Advisory Committee:** An industry and government advisory committee that recommends port security improvements to the USCG and advises the Transportation Worker Identification Credentials (TWIC) Reader Workgroup on improvements to the TWIC Reader Rule to enhance port and facility security.
- **Oil and Natural Gas Subsector Coordinating Council:** A self-organized, self-governed body that facilitates collaboration among critical infrastructure owners, operators, trade associations and industry representatives to strengthen oil and natural gas sector security and resilience.
- **Small Unmanned Aircraft Systems (sUAS) Security Critical Infrastructure Partnership Advisory Council Working Group:** A public and private sector advisory group that develops best practices and recommends scalable risk mitigation solutions to the federal government for sUAS threats.

Strengthening Maritime Security Through Collaboration

Now in its fifth year, *Industry Day*, jointly hosted by AFPM and the American Chemistry Council, serves as a vital platform for enhancing maritime security through public-private collaboration. The event brings together refining and chemical industry leaders with U.S. Coast Guard officials to exchange insights, share updates and build trusted relationships.

Through open dialogue and expert-led sessions, participants explore evolving security priorities—from regulatory compliance to emerging technologies. The event's consistent growth and strong engagement demonstrate its value as a forum for operational learning and strategic partnership.

By fostering connection across sectors, *Industry Day* advances a shared commitment to safety, resilience and maritime readiness.

Refining and Petrochemical Sector Enhances Major Event Preparedness

Extreme weather events, particularly hurricanes, can pose serious challenges to refining, petrochemical and midstream operations. To safeguard workers, communities and the environment, AFPM members maintain comprehensive preparedness plans designed to mitigate safety risks and reduce potential environmental impacts. These plans are dynamic and continuously updated to address emerging threats and incorporate the latest best practices.

Building Resilience Through Continuous Improvement

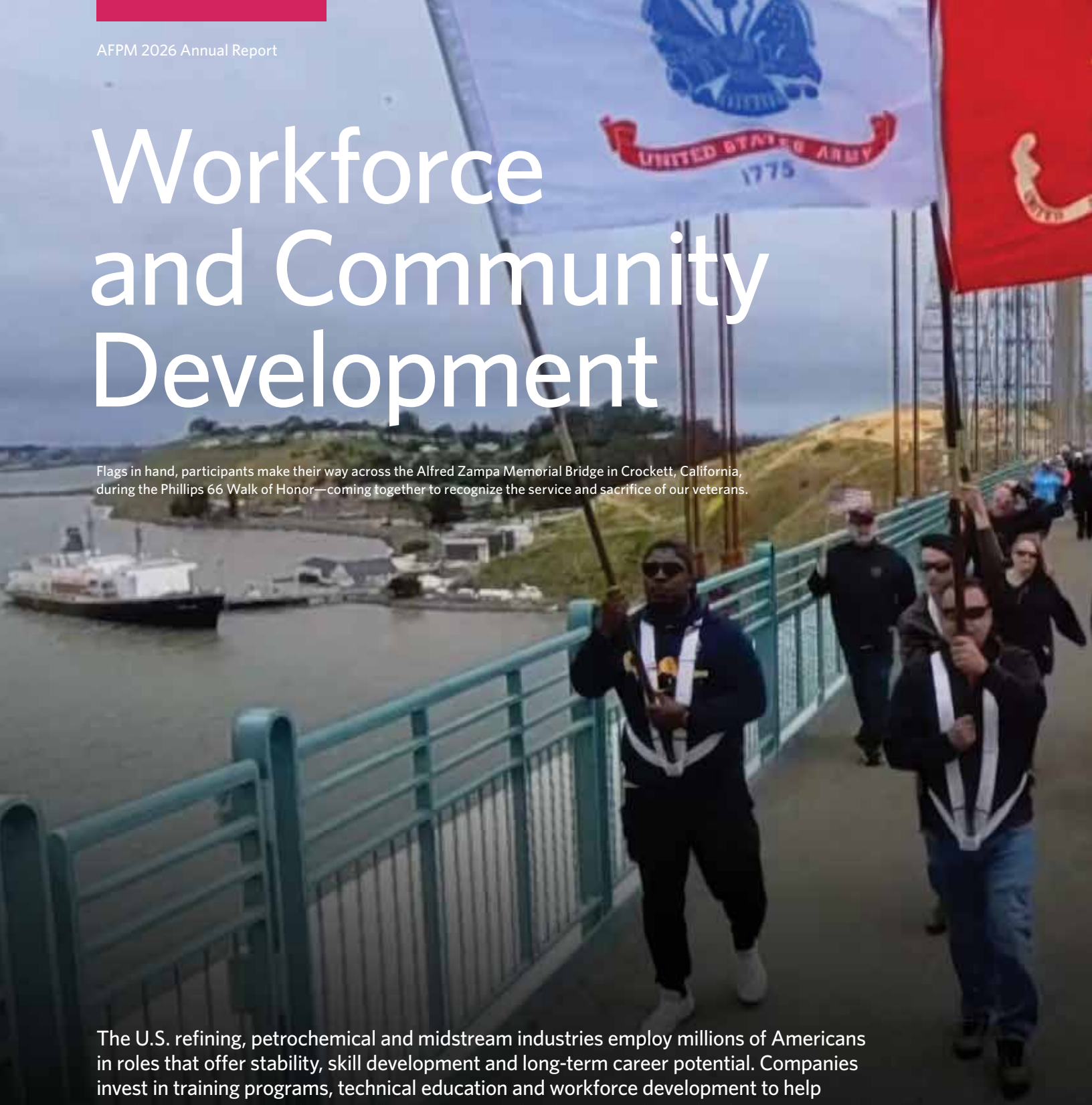
Refining, petrochemical and midstream companies are proactively strengthening their disaster readiness through ongoing planning, infrastructure enhancements and coordinated emergency response strategies. Working closely with government agencies, they're focused on minimizing disruption and ensuring rapid recovery to protect operations and support critical fuel supply.

Some of the measures taken include:

- Year-Round Planning: Preparation is not seasonal. Our member companies conduct continuous risk assessments, update emergency protocols and run drills with local and federal agencies to stay ready.
- Stronger Infrastructure Standards: Facilities are being built or retrofitted to withstand higher wind speeds and flooding. This includes elevating critical equipment and reinforcing structures in high-risk zones.
- Smarter Shutdown Protocols: Operators are quicker to evacuate nonessential personnel and initiate controlled shutdowns to minimize damage. These decisions are increasingly guided by real-time weather analytics and predictive modeling.
- Supply Chain Resilience: With much of the East Coast and Midwest relying on Gulf Coast refineries, companies are investing in redundant logistics routes and fuel reserves to reduce disruption when storms hit.
- Post-Storm Coordination: After hurricanes, refineries and petrochemical manufacturers work closely with the USCG, DHS, DOE, Federal Emergency Management Agency and local responders to assess damage, restore operations and prioritize fuel delivery to critical services.

Workforce and Community Development

Workforce and Community Development



Flags in hand, participants make their way across the Alfred Zampa Memorial Bridge in Crockett, California, during the Phillips 66 Walk of Honor—coming together to recognize the service and sacrifice of our veterans.

The U.S. refining, petrochemical and midstream industries employ millions of Americans in roles that offer stability, skill development and long-term career potential. Companies invest in training programs, technical education and workforce development to help employees grow and adapt in a changing energy landscape. Industry leaders continue to build a more diverse and inclusive workforce by creating environments where people feel respected, supported and empowered to contribute meaningfully.

These industries maintain strong community by supporting education, public safety and charitable initiatives. They collaborate with local schools to build workforce skills and partner with nonprofits to aid first responders, veterans and underserved groups. Their goal is to strengthen the communities that sustain them.

Building Talent and Strengthening Skills

Companies across our industries are investing in their people with innovative programs that foster leadership, technical expertise and inclusive growth. From hands-on training to digital learning platforms and employee-led networks, these initiatives reflect a shared commitment to building resilient, skilled workers for tomorrow.

- **Ergon** created their Management Trainee Program to fast-track the technical and leadership skills of future Ergon leaders. The program aims to put trainees on an accelerated path towards leadership by placing them at one of Ergon Asphalt & Emulsions' larger facilities, where they are exposed to most of the processes they might see in their future management careers with Ergon, including polymer modified asphalt cement production, railcar and barge operations, and emulsion production.[57]

- **Phillips 66** enhanced its leadership development initiatives in 2024, using programs like Field Safety and Leadership Essentials, Crucial Conversations and Leading with Trust to lay a foundation for leadership excellence across all levels. Phillips 66's robust participation rate extended to executives, with 90 percent of its executives participating in the flagship G.O.L.D. (Grow. Optimize. Lead. Deliver.) Executive Leadership Program, which aims to equip senior leaders with the tools and insights needed to navigate complex challenges and lead with confidence. Overall, 91 percent of all Phillips 66 leaders engaged in leadership development opportunities.[58]

- **Plains All American Pipeline**'s employee-led Cultivating Connections network fosters inclusion at Plains and across the industry through mentoring, networking, sharing experiences and furthering leadership development. Cultivating Connections launched a young professionals group with the goal of providing career development opportunities to early-career and other interested employees through educational workshops, networking and events.[59]

- **Ecolab**'s 2024 Development Season offered Ecolab associates the opportunity to participate in development tracks—a curated combination of independent and group learning opportunities translated into multiple languages—as well as a catalog of over 20,000 courses. LinkedIn Learning was provided to associates, which resulted in over 28,000 course completions in 2024.[60]

Welcoming All, Hearing Every Voice

AFPM member companies are committed to cultivating strong, resilient workforces by recruiting talent from a wide range of backgrounds and fostering environments where every employee is supported and empowered to succeed. Through targeted initiatives and programs like Employee Resource Groups (ERGs), these companies promote connection, career development and a sense of belonging—strengthening their organizations and the broader industry.

- **Ecolab**'s 11 employee-driven ERGs include more than 9,300 members and 103 chapters globally, helping to connect emerging leaders with professional and personal development opportunities.[61]
- In 2024, **Phillips 66**'s 10 ERGs expanded across its 70+ chapters, with 40 percent of employees participating in an ERG, up from 35 percent in 2023. This growth of almost 700 employees reflects the need for community and belonging in the workplace and demonstrates Phillips 66's progress in meeting those needs.[62]
- **INEOS** established the INEOS Women's Network in 2022 to shrink the gender gap in manufacturing. The group has grown to over 300 members and hosts regular events in the Texas area where it was founded, as well as online masterclasses on issues such as thought leadership, career development and executive presence.[63]
- **W.R. Grace** celebrates the wealth of experiences and perspectives of its employees through its ERGs, including the Asian American & Pacific Islanders (AAPI) Group, Black Employee Resource Group (BERG), LGBTQ+ Employee Resource Group, Military Veterans Employee Resource Group (G-VETS) and Women Employees & Allies Championing Together (WE ACT).[64]

Leaders are expanding access to physical and mental health support through:

Fitness Programs

Counseling

Stress Management Workshops

Mindfulness Tools

Leading with Empathy

Our industries care about employees' well-being, knowing that healthy workers are more productive and fulfilled. Leaders are expanding access to physical and mental health support through fitness programs, counseling, stress management workshops and mindfulness tools. These efforts help employees take care of themselves and get support when they need it.

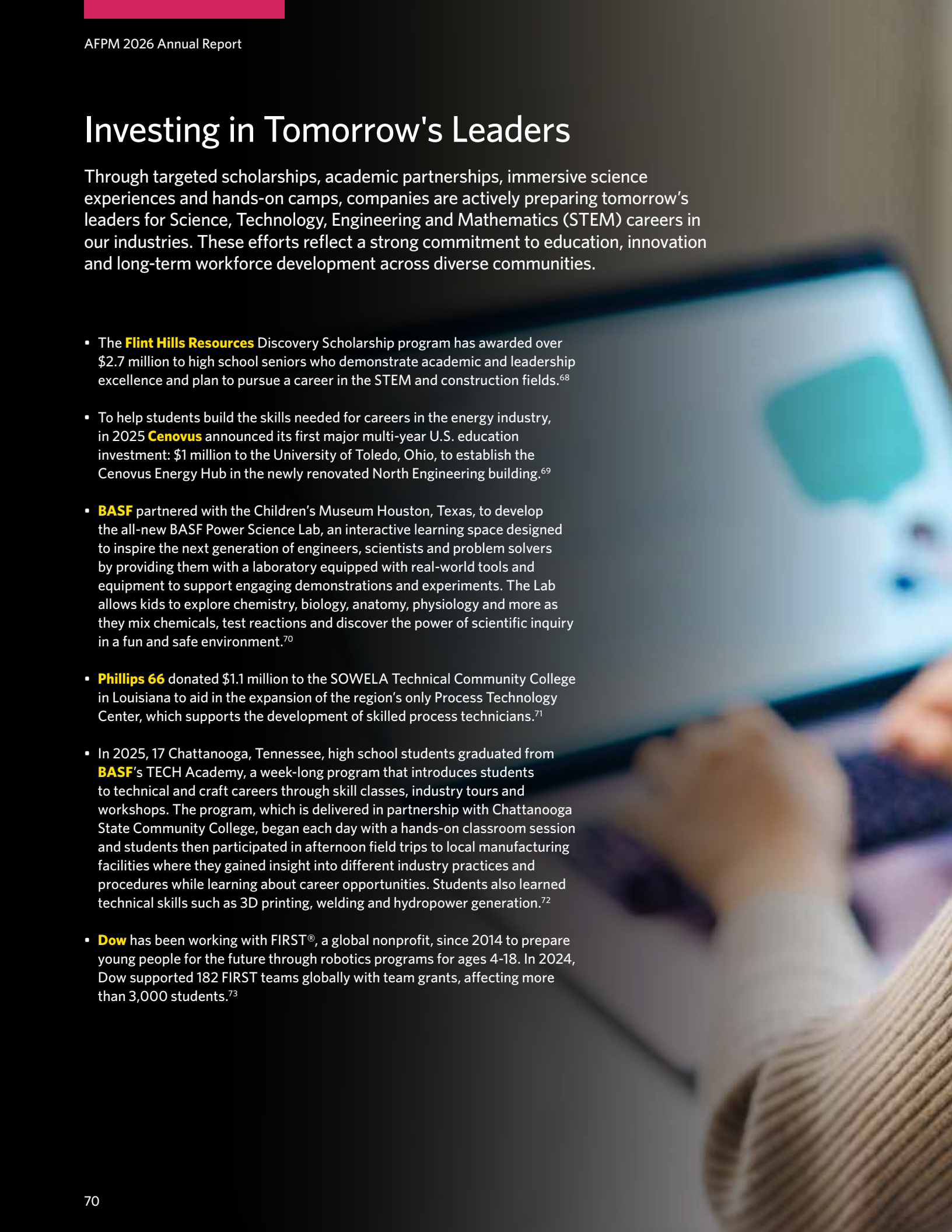
LyondellBasell's Employee Assistance Program offers resources and tools on topics including emotional wellness, resiliency, workplace success, work-life balance, personal and family goals, and good health. In 2024, after gathering employee feedback and reviewing benefits offerings, LyondellBasell enhanced its financial wellness offerings. By partnering with a global financial services firm, LyondellBasell now provides resources for financial planning, retirement savings, debt management and personalized education to help employees overcome financial challenges and build long-term security.[65]

Chevron Phillips Chemical supports healthy lifestyles by encouraging employees to engage with "Your Journey to Wellness," a program that focuses on improving physical and financial well-being. Employees earn cash rewards and reimbursements for participating in preventative care activities. In 2024, CPChem expanded the program to offer rewards for engaging in financial wellness activities and completing health screenings.[66]

Dow's Personify Health global app provides access to high-quality mental, physical, financial and social well-being resources for employees. As of 2024, more than 84 percent of employees have enrolled and 77 percent use the app frequently. Of those who utilize the app, 71 percent say it helps them better manage work-related stress and 68 percent report it helps improve energy at the end of the workday.[67]

Investing in Tomorrow's Leaders

Through targeted scholarships, academic partnerships, immersive science experiences and hands-on camps, companies are actively preparing tomorrow's leaders for Science, Technology, Engineering and Mathematics (STEM) careers in our industries. These efforts reflect a strong commitment to education, innovation and long-term workforce development across diverse communities.



- The **Flint Hills Resources** Discovery Scholarship program has awarded over $2.7 million to high school seniors who demonstrate academic and leadership excellence and plan to pursue a career in the STEM and construction fields.[68]

- To help students build the skills needed for careers in the energy industry, in 2025 **Cenovus** announced its first major multi-year U.S. education investment: $1 million to the University of Toledo, Ohio, to establish the Cenovus Energy Hub in the newly renovated North Engineering building.[69]

- **BASF** partnered with the Children's Museum Houston, Texas, to develop the all-new BASF Power Science Lab, an interactive learning space designed to inspire the next generation of engineers, scientists and problem solvers by providing them with a laboratory equipped with real-world tools and equipment to support engaging demonstrations and experiments. The Lab allows kids to explore chemistry, biology, anatomy, physiology and more as they mix chemicals, test reactions and discover the power of scientific inquiry in a fun and safe environment.[70]

- **Phillips 66** donated $1.1 million to the SOWELA Technical Community College in Louisiana to aid in the expansion of the region's only Process Technology Center, which supports the development of skilled process technicians.[71]

- In 2025, 17 Chattanooga, Tennessee, high school students graduated from **BASF**'s TECH Academy, a week-long program that introduces students to technical and craft careers through skill classes, industry tours and workshops. The program, which is delivered in partnership with Chattanooga State Community College, began each day with a hands-on classroom session and students then participated in afternoon field trips to local manufacturing facilities where they gained insight into different industry practices and procedures while learning about career opportunities. Students also learned technical skills such as 3D printing, welding and hydropower generation.[72]

- **Dow** has been working with FIRST®, a global nonprofit, since 2014 to prepare young people for the future through robotics programs for ages 4-18. In 2024, Dow supported 182 FIRST teams globally with team grants, affecting more than 3,000 students.[73]

Igniting STEM Curiosity Through Summer Camps

Across the country, industry volunteers are helping young students discover the excitement of STEM through immersive summer camps. Many AFPM members volunteer their time, experience and knowledge to host STEM summer camps to inspire and educate young students in these fields. These camps include a variety of hands-on activities, workshops and presentations led by industry professionals.

Chevron Phillips Chemical's Camp Chemisphere features applied STEM experiments and engaging chemistry demonstrations that offer children a glimpse into the science behind CPChem.

"Camp Chemisphere is our version of 'take your child to work day.' This annual event allows children of our employees to see the scientific foundations on which our company was built. We use hands-on experiments to explain the magic of chemistry and inspire the next generation of scientists and engineers," said Erica Miller, Corporate Communications Manager at Chevron Phillips Chemical.

Valero's Texas City Refinery teams up with Linde HyCO Plant to bring STEM education to the children of The Salvation Army Boys & Girls Club of Texas City. The STEM camp provides STEM education to children ages 6-12.

Motiva engineers volunteer at Lamar University's Introduction to Engineering summer camp for 6th, 7th and 8th graders. Two week-long camps are hosted for students to explore STEM topics, with volunteers helping with hands-on activities and lessons.

These programs spark curiosity, strengthen community ties and inspire the next generation of scientists and engineers.

Caring for our Communities

Refiners, petrochemical manufacturers and midstream operators actively strengthen the communities they serve through wide-ranging philanthropic and volunteer efforts. Their support spans education, healthcare, emergency response and inclusive programs that uplift families, veterans and disadvantaged people.

- **Par Pacific's** Annual Fueling Dreams campaign supports Special Olympics Hawaii athletes by collecting donations at participating Hele stores across Hawaii Island, Oahu and Maui. All donations provide opportunities for athletes with intellectual disabilities to train and compete for free. Par Pacific has been a strong supporter of Special Olympics Hawaii for more than three decades, giving more than $1.6 million to the Special Olympics Hawaii athletes and programs.[74]
- In June 2025, **CITGO's** Lemont Refinery, Illinois, hosted its 29th annual Driving for a Cure Golf Outing and its inaugural Driving for a Cure Gala in partnership with the Muscular Dystrophy Association (MDA). Together, these events raised $1,091,642 to advance MDA's mission of empowering individuals living with neuromuscular diseases. Since its inception, Driving for a Cure has contributed more than $10.2 million to support innovative research, clinical trials, advanced care and new treatments for muscular dystrophy, ALS and more than 300 related neuromuscular conditions.[75]
- Since 2022, **HF Sinclair** has raised $2.1 million for Folds of Honor through designated fill-ups and donations at Sinclair-branded stations. The 2024 campaign ran for 50 days in November and December, when Sinclair dealers and distributors as well as HF Sinclair employees raised funds for scholarship programs in support of American families of fallen and disabled veterans and first responders.[76]
- **PBF's** Torrance Refining Company in California donated $25,000 to the Switzer Learning Center, which aims to help children of all abilities thrive both academically and socially.[77]
- **Marathon Petroleum** supported Hospice El Paso, Texas, with a $174,000 donation, including a fully equipped ambulance to aid patient transport.[78]
- **Motiva**, in partnership with the Julie Rogers Gift of Life Program, has provided more than 700 preventative health care screenings to medically underserved women and men throughout Southeast Texas, helping to empower the local community to take control of their health and well-being.[79]

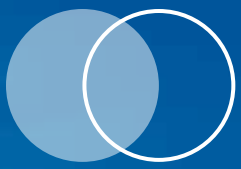
Phillips 66 Walk of Honor

Each year, Phillips 66 hosts the Walk of Honor at its Rodeo Renewable Energy Complex in Rodeo, California, bringing the community together to honor military veterans and support local services. Organized in partnership with groups like the Viet Nam Veterans of Diablo Valley (VNVDV), the event coincides with Armed Forces Day and features a community walk, fundraising activities and a post-walk luncheon celebrating service members. Since its inception in 2011, the Walk of Honor has been a cornerstone of Phillips 66's commitment to veterans and the community. This annual tradition has raised and donated more than $600,000 to programs that assist local veterans and strengthen community services. Beyond providing critical support, the event fosters deep appreciation for the sacrifices made by those who serve.

Policies and Principles

Policies and Principles

AFPM works to advance public policies that address our most pressing challenges. We support policies that enable our members to supply the fuel and petrochemicals that growing global populations and economies need to thrive, and to do so in a sustainable way.



Enhance Transparency

The future of American manufacturing requires reasonable and cost-effective regulations. AFPM supports regulatory reform that enhances transparency, accountability and efficacy of federal regulations based in sound science.

Promote Competition

The refining and petrochemical industries support policies that promote innovation, increase competition and achieve market-based solutions to society's challenges. Policymakers should also look to ensure U.S. companies operating abroad are treated fairly through a system of trade rules that facilitate cooperation and regulatory alignment and reflect the reality of an integrated energy and petrochemical market. Finally, policymakers must ensure the full potential of the modernized tax code is realized to spur growth now and into the future.

Balance Needs for All Americans

U.S. policies should balance the need for affordable and reliable fuels and a growing economy with sound environmental policies. The essential role and many societal benefits that petroleum fuels, natural gas and petrochemicals provide our nation and the world should not be ignored.

Strengthen our Foundation

The global gains of the U.S. refining and petrochemical industries can't be maintained or built upon unless our nation's infrastructure keeps pace. Investment in critical infrastructure, including roads, pipelines, rail, inland waterways and ports, are key to accessing and expanding the use of U.S. resources.

AFPM Climate Policy Principles

AFPM is committed to the development of sound policies that enable our members to supply the fuel and petrochemicals that growing global populations and economies need to thrive, and to do so in an environmentally sustainable way.

Policies addressing climate change must be:

- Balanced and measured to improve quality of life, ensuring the long-term economic, energy and environmental needs of humanity are met;
- Protective of U.S. competitiveness and prevent the shifting of production, jobs and emissions from the United States to other countries;
- Harmonized, preemptive and economy-wide;
- Simple and transparent; and
- Achievable and flexible to adjust as necessary.

AFPM and our members are further committed to:

- Delivering affordable, reliable fuel and petrochemical products that lift the standards of living for people all over the world;
- Improving the efficiency and sustainability of our operations;
- Offering fuels and petrochemicals that make engines and other products more efficient; and
- Continuing research, innovation and application of new technologies and products.

Plastic Waste Principles

AFPM approaches the challenges of global plastic waste by addressing the many aspects of this complex issue. Ultimately, our solutions always acknowledge the tremendous long-term value of plastic products, while considering data-driven innovations that promote advanced recycling solutions and remove regulatory barriers to widescale adoption of such technologies.

Specifically, we advocate for:

Developing a national framework to eliminate plastic waste in the environment and grow the circular economy for plastics.

Supporting the innovation and development of plastic waste repurposing technologies that have the potential to recover plastic waste and transform it into usable materials. This includes removing regulatory barriers for new facilities that will allow for the continued expansion of advanced recycling capabilities.

Working collaboratively across the plastics value chain and with governments to encourage the responsible disposal of plastic products and the recycling, reuse and recovery of plastic waste on a global scale. This includes increased funding of state and local waste collection programs to better source and collect plastic waste.

Ensuring the regulatory classification for plastic waste as a manufacturing feedstock, which simplifies the process and reduces regulatory hurdles for companies processing plastic; and proper accounting and tracking of recycled content, allowing companies to set clear goals and to consistently track their recycling efforts.

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AFPM is governed by a Board of Directors, comprised of representatives from each of our regular members. When the Board is not in session, it delegates authority to the AFPM Executive Committee to render judgments and govern the Association. The Board of Directors elects a chairman, seven vice presidents and a treasurer who, together with the immediate past chairman, comprise the Executive Committee. The Board also elects a president to serve as chief administrative officer of the Washington-D.C.-based staff and the headquarters office.

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The American Fuel & Petrochemical Manufacturers is the leading trade association representing the makers of the fuels that keep us moving, the petrochemicals that are the essential building blocks for modern life and the midstream companies that get our feedstocks and products where they need to go. We make the products that make life better, safer and more sustainable—we make progress.

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Information Resources

Communications

Through a combination of traditional and social media outlets, AFPM reaches the press, policymakers and the public to educate them on the facts about our industries' work and value, and to inform member company employees about important issues impacting the industries.

AFPM | EMPOWER

WE MAKE PROGRESS

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Publications

AFPM publications inform our members about industry statistics, technical innovations, environment and safety developments, security and many other relevant issues.

Newsletters and General Publications*

- Annual Report
- Daily Alert
- Energy in Motion—The AFPM Transportation & Infrastructure Newsletter
- Environmental Weekly Update
- Fuel Line
- Green Room Report
- Security Watch
- Sustainability Report
- Tech Update

Statistics

- AFPM U.S. Refining & Storage Capacity Report
- Annual Survey of Occupational Injuries & Illnesses
- Process Safety Event Report

Petrochemical Statistics Program Subscriptions

- AFPM Petrochemical Surveys, Production & Inventory Statistics—quarterly
- AFPM Selected Petrochemical Statistics U.S. Trade Data—monthly

Technical Papers

- Annual Meeting Papers
- Cybersecurity Conference Papers
- Environmental Conference Papers
- International Base Oils & Waxes Conferences Papers
- National Occupational & Process Safety Conference Exhibition Papers
- Operational Planning Control and Automation Technologies Conference Papers (2019 and previous)
- Reliability & Maintenance Conference Papers (2019 and previous)

Transcripts

Operations & Process Technology Summit, formerly Q&A (2019 and previous)

* Publications are distributed to members only.

Standing Committees and Working Groups

The **Associate Steering Committee** provides a forum for the Association's contractors, suppliers, vendors and consultants to communicate with the Board of Directors on items of mutual interest and support.
Chair: Stephen Toups, Turner Industries Group, LLC
AFPM Secretary: Laura Hornbuckle

The **Automation & Operations Technology Committee** focuses on sharing practical experience in application management, and integration of technology in the areas of process control and automation, modeling, real-time optimization, artificial intelligence and other emerging technology applications.
Chair: Adi Punuru, ExxonMobil Technology and Engineering Company
AFPM Secretary: Tanya Cooper

The **Communications Committee** shares information, ideas and communications strategies to increase support by external audiences for policy positions established by the Executive Committee and adopted by the AFPM Board.
Chair: Jake Reint, Flint Hills Resources, LLC
AFPM Secretary: Jaime Zarraby

The **Crude/Coking Process Technology Committee** promotes safe, reliable and sustainable operations in feedstock handling crude distillation, desalting and coker units in refineries.
Chair: Hector Gamboa-Arizpe, CITGO Petroleum Corporation
AFPM Secretary: Yvette Fowler

The **Cybersecurity Committee** provides information and recommendations on matters pertaining to cybersecurity and cyber threats.
Chair: Shiva Krishnasamy, Motiva Enterprises LLC
Vice Chair: Kenny Mesker, Chevron
AFPM Secretary: Jeff Gunnulfsen

The **Environmental Committee** provides a forum for members to exchange views and discuss environmental activities and advises the AFPM Board and staff on current environmental laws and regulations.
Chair: Hannah Placzek, Marathon Petroleum
AFPM Secretary: Leslie Bellas

The **FCC Process Safety Regional Workshop** is a one-day event that covers the FCC Process Safety Curriculum that has been developed by the FCC Committee. The curriculum was developed as a result of several high-profile incidents. The workshop is a series of knowledge sharing and interactive sessions with the goal of each attendee taking a list of actionable items back to their site to improve the safety of their FCC operations.
Chair: Ziad Jawad, Phillips 66
AFPM Secretary: Yvette Fowler

The **FCC Process Technology Committee** provides a technical forum to help ensure that our individual fluid catalytic cracking units (FCCUs) operate in the safest manner possible.
Chair: Nikolas Larsen, Marathon Petroleum Corporation
AFPM Secretary: Yvette Fowler

The **Fuels Committee** provides information and policy recommendations concerning legislative, regulatory and motor fuel specification developments.
Chair: Keesha Esqueda, Flint Hills Resources
AFPM Secretary: Leslie Bellas

The **Gasoline Processes Committee** supports, or leads if appropriate, industry's adaptation to the changing demand and or characteristics of the U.S. gasoline stream.
Chair: Rhett Finch, Marathon Petroleum Corporation
AFPM Secretary: Julie McQueen-Foster

The AFPM Board of Directors relies on the counsel and support of experts among its membership to accomplish specific Association functions and plan for the Association's future. In addition to our standing 27 committees and subcommittees, we have a series of regional networks and working groups that serve to assist the Board in achieving AFPM's goals.

The **Government Relations Committee** serves as the principal forum for sharing information, ideas and strategies on legislative and regulatory issues important to the refining and petrochemical industries.
Chair: Stephen Higley, Cenovus Energy Inc.
AFPM Secretary: Aaron Ringel

The **Hydrofluoric Acid Alkylation Committee** provides a forum for member companies to share and develop technical information and tools to promote the safe operation, maintenance and continuous improvement of HF Alkylation Units (HFAUs).
Chair: Liana Siegel
AFPM Chair: Julie McQueen-Foster

The **Hydroprocessing Process Technology Committee** promotes safe and reliable operations within the hydroprocessing community and to ensure safe and sustainable operations.
Chair: Montri Vichailak, Marathon Petroleum Corporation
AFPM Secretary: Yvette Fowler

The **Immersive Learning Committee** provides a forum for the exchange of information on learning, as well as research and development of training tools and solutions that utilize existing and emerging technologies to enhance member training programs.
Chair: Timothy Chappell, ExxonMobil Corporation
AFPM Secretary: Abby Esterly

The **Industrial Hygiene Subcommittee** provides a forum for the exchange of information on industrial hygiene, regulatory and legislative trends and developments, as well as other matters concerning industrial hygiene standards and practice.
Chair: Jason McGowan, HF Sinclair
AFPM Secretary: Mawusi Bridges

The **Issues Committee** advises the Executive Committee and provides direction and guidance to AFPM staff on current policy issues important to the refining and petrochemical industries.
Chair: Mark Lashier, Phillips 66
AFPM Secretary: Geoff Moody

The **Labor Relations & Human Resources Committee** facilitates the exchange of information on matters related to industrial and labor relations, human resources practices and collective bargaining.
Chair: Matt Yarborough, Chevron Corporation
AFPM Secretary: Julia Kramer

The **Legal Committee** recommends litigation strategies to advance the interests of AFPM's members and the industries. The Committee also provides guidance to the AFPM staff on legislative and regulatory proposals and general legal issues affecting the industry.
Chair: Dan Syphard, Cenovus Energy Inc.
AFPM Secretary: Rich Moskowitz

The **Manufacturing Committee** provides technical support and recommendations on matters that affect facility operations and products including federal, state and local laws and regulations.
Chair: Sterling Neblett, CITGO Petroleum Corporation
AFPM Secretary: Julie McQueen-Foster

The **Midstream Committee** analyzes policy, regulations and guidance relating to the transportation of oil, natural gas and the products derived from these critical resources, as well as other transportation and infrastructure issues that may arise.
Chair: John Hack, Marathon Petroleum
AFPM Secretary: Rob Benedict

The **Petrochemical Committee** advises the AFPM Board and staff on current issues of importance to the petrochemical industry.
Chair: Chris D'Anna, Enterprise Products
AFPM Secretary: Rob Benedict

The **Petrochemical Statistics Subcommittee** advises and assists the Petrochemical Committee and AFPM staff on matters pertaining to the collection and dissemination of statistics on petrochemicals, including trade, production and inventories.
Chair: Ryan Macaaluso, Motiva Enterprises LLC
AFPM Secretary: Robert Kelsey

The **Reliability & Maintenance Committee** promotes the exchange of technical information and proven practices related to process plant reliability, maintenance, inspection, procurement, project engineering, turnarounds, procurement and project engineering.
Chair: Bill Clark, Phillips 66
AFPM Secretary: Tanya Cooper

The **Safety & Health Committee** provides a forum for members to exchange views and share occupational and process safety best practices and developments in occupational and process safety within safety related legislation and regulation.
Chair: Larry Webb, Flint Hills Resources, LLC
AFPM Secretary: Mawusi Bridges

Standing Committees and Working Groups

continued

The **Security Committee** provides a forum for the exchange of information among the membership on security-related issues within the petroleum refining and petrochemical manufacturing industries.
Chair: Andy Thompson, Motiva Enterprises, LLC
Vice Chair: Shane Ward, BASF
AFPM Secretary: Jeff Gunnulfsen

The **State & Local Outreach Committee**'s purpose is to discuss state-level legislative and regulatory issues of importance to AFPM's refining and petrochemical members. The Committee will advocate for AFPM policies at the state and local levels, as directed by the Issues Committee.
Chair: Todd Washam, Cenovus
AFPM Secretary: Don Thoren

The **Sustainability Process Technology Committee** supports industry's growth and sustainability goals by promoting new emerging technologies, providing updated market and regulatory outlooks, and shares good practices in engineering and operations of new and retrofit renewable processing units.
Chair: Eric Legare, Chevron U.S.A. Inc.
AFPM Secretary: Julie McQueen-Foster

The **Sustainability Working Group** provides a forum for discussing how the fuel and petrochemical industries are advancing sustainability today and contributing to a sustainable future through environmental stewardship, the advancement of health and safety, helping people and communities thrive, and driving progress both within our industries and in sectors across the economy.
AFPM Secretary: Jaime Zarraby

The **Tax Policy Committee** provides analysis and recommendations on tax-related legislation and engages in regulatory matters at the U.S. Treasury Department and Internal Revenue Service.
Chair: Lauren Sheehan, Valero Energy Corporation
AFPM Secretary: Aaron Ringel

The **Women in Industry Working Group** focuses on empowering women in our industry by helping them develop professional goals, create networking and mentoring opportunities, and provides training and skills development. Members take advantage of opportunities to learn from industry leaders, engage and connect.
Chair: Jenny Hebert, Ketjen Corporation
AFPM Secretary: Laura Hornbuckle

The **Workforce Development Network** directs and supports AFPM's Workforce Development Program. This network serves as a conduit for members and regional partners to share good practices and explore outreach opportunities to deliver the diverse and qualified workforce needed for the future.
AFPM Secretary: Julia Kramer

The **Occupational Safety Regional Network Leadership Subgroup** reports to the Safety & Health Committee on the AFPM occupational safety regional networks. In addition, the Subgroup highlights practices for inclusion in the Practice Sharing Program, topics for the National Safety Conference, and provides review for the Safety Innovation Award.
Chair: Kendra Richins, Phillips 66
AFPM Secretary: Lara Swett

Occupational Safety Regional Networks

Central States Occupational Safety Regional Network
Chair: Greg Pinto, HF Sinclair Corporation

East Coast/Mid-West Occupational Safety Regional Network
Chair: Nate Mathias, Marathon Petroleum Corporation

Eastern Gulf Coast Occupational Safety Regional Network
Chair: Alan Parker, Ergon, Inc.

Pacific Coast Occupational Safety Regional Network
Chair: Casey Woods, Valero Energy Corporation

Rocky Mountain Occupational Safety Regional Network
Chair: Brett Humes, Big West Oil, LLC

Texas Gulf Coast Occupational Safety Network
Chair: Chris Nelson, Valero Energy Corporation

The **Hydrofluoric Acid Alkylation Safety Network** provide a forum for the sharing of non-competitive topics between first and second-line supervisors in HF Alkylation Units. Topics focus on unit safety, personal and process safety, corrosion, inspection practices, material and equipment reliability as it pertains to safety, industry incidents, mitigation systems and interpretation and use of API RP-751.
Chair: Jimmy Chaplin, CITGO Petroleum Corporation
AFPM Secretary: Julie McQueen-Foster

Advancing Process Safety Programs

The **Process Safety Advisory Group (PSAG)** provides leadership, support and guidance to the Advancing Process Safety programs to promote process safety performance excellence across the Association's memberships.
Chair: Patricia Roberts, Chevron U.S.A. Inc.
AFPM Secretary: Mawusi Bridges

The **Process Safety Workgroup** is responsible for implementing the direction and vision of the Process Safety Advisory Group by providing oversight and direction to the APS programs.
Chair: Greg Roos
AFPM Secretary: Mawusi Bridges

Hazard Identification and Practice Sharing
Chair: Michael James, Chevron U.S.A. Inc.
AFPM Secretary: Jasmine Beasley

Industry Learning and Outreach
Chair: Chris Clover, Chevron U.S.A. Inc.
AFPM Secretary: Mawusi Bridges

The **Process Safety Regional Network Program** provides opportunities for site-level practitioners to network, share events, learnings and good practices with each other in a non-competitive environment in a variety of disciplines.
Chair: Charli Horowitz, PBF Energy Inc.
Secretary: Jasmine Beasley

Central States Process Safety Regional Network
Chair: Rhonda Schmidt, HF Sinclair

East Coast Process Safety Regional Network
Chair: Akaninyene Akpan, Irving Oil

Eastern Gulf Coast Process Safety Regional Network
Chair: Casey Berniard, Marathon Petroleum Corporation

Mid-West Process Safety Regional Network
Chair: Judd Moorhouse, Flint Hills Resources, LLC.

Rocky Mountain Process Safety Regional Network
Chair: Jonathan Rowntree, Chevron U.S.A. Inc.

Texas Gulf Coast Process Safety Regional Network
Chair: Daniella Garza, Flint Hills Resources

Walk the Line Subgroup
Chair: Lawrence Moreaux, LyondellBasell Industries
AFPM Secretary: Mawusi Bridges

2026 Industry Meetings

AFPM delivers best-in-class meetings and live events that bring together the refining, petrochemical and midstream industries in dynamic and interactive formats. Our annual slate of conferences, workshops and webinars are comprehensive, covering all industry disciplines including management, maintenance, reliability, safety, environment, process technologies, operations, labor relations and security.

Annual Meeting
March 15 – 17, 2026
Hyatt Regency
New Orleans, LA

50th International Petrochemical Conference
March 29 – 31, 2026
Grand Hyatt San Antonio
San Antonio, TX

Labor Relations / Human Resources Conference
April 14 – 15, 2026
JW Marriott New Orleans
New Orleans, LA

Security Conference
April 16 – 17, 2026
JW Marriott New Orleans
New Orleans, LA

National Occupational & Process Safety Conference
May 5 – 7, 2026
Grand Hyatt San Antonio
San Antonio, TX

AFPM Summit
August 31 – September 3, 2026
Gaylord Texan
Grapevine, TX

Environmental Conference & Exhibition
October 4 – 6, 2026
Grand American Hotel
Salt Lake City, UT

For more information,
visit www.afpm.org/events

AFPM

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To learn more, contact Laura Hornbuckle at membership@afpm.org.
202.457.0480
www.afpm.org/membership

Endnotes

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2 Oxford Economics, The Economic Contributions of the U.S. Petroleum Refineries
3 Oxford Economics, The Economic Contributions of the U.S. Petroleum Refineries
4 Oxford Economics, The Economic Contributions of the U.S. Petroleum Refineries
5 Oxford Economics, The Economic Contributions of the U.S. Petroleum Refineries
6 EIA
7 United States International Trade Commission
8 The United States has been an annual net total energy exporter since 2019
9 EIA
10 U.S. Bureau of Economic Analysis
11 AFPM analysis of Argus Media data
12 AFPM analysis of Argus Media data
13 AFPM analysis of Argus Media data
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15 Global Partners for Plastics Circularity
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75 CITGO press release
76 HF Sinclair
77 Switzer Learning Center
78 CStoreDecisions
79 Motiva website

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