



AFPM

American
Fuel & Petrochemical
Manufacturers

**ANNUAL REPORT
2013**



UNLOCKING AMERICA'S FULL POTENTIAL

“NOT ONLY THE WEALTH, BUT THE INDEPENDENCE AND SECURITY OF A COUNTRY, APPEAR TO BE MATERIALLY CONNECTED WITH THE PROSPERITY OF MANUFACTURERS. EVERY NATION ... OUGHT TO ENDEAVOR TO POSSESS WITHIN ITSELF ALL THE ESSENTIALS OF A NATIONAL SUPPLY. THESE COMPRISE THE MEANS OF SUBSISTENCE, HABITATION, CLOTHING AND DEFENSE.”

Alexander Hamilton, Secretary of the Treasury
Report on Manufactures, December 5, 1791

From the Chairman of the Board and the President



David L. Lamp
Chairman of the Board



Charles T. Drevna
President



America is on the verge of an economic revitalization and a strong manufacturing base is a key to such an outcome. We have a tremendous opportunity to bring the innovation, jobs and economic growth that accompanies a strong manufacturing sector back to our shores. Now is our time to demonstrate the many positive contributions America's fuel and petrochemical manufacturers are making to our nation. To that end, in 2013 we're putting the spotlight on the desirable and proven societal benefits AFPM makes possible with our theme: Fueling America's Manufacturing Renaissance.

U.S.-based fuel and petrochemical industries are vital national assets. As manufacturers, our members are playing a pivotal role in helping to rebuild the economy by:

- Supporting millions of American jobs.
- Moving our nation towards energy independence and strengthening national security.
- Innovating to realize a cleaner environment and better fuels.
- Investing in unparalleled workplace safety.
- Making life in the 21st century possible through thousands of products we rely on every day.

But we're only at the beginning of this era of opportunity. Adherence to certain fundamental principles is required if we are to unlock the full potential of a U.S. manufacturing renaissance. These principles include:

- Free markets that enable our industry to compete on a level playing field and serve consumers most effectively and efficiently.
- Sensible regulations on emissions, biofuels and access to energy sources based on solid cost/benefit analyses developed through sound science and objective economics.
- Transparency of the actions elected officials take to shape manufacturing conditions and policies.

With these tenets in place, AFPM members are committed to further advancing innovation and increasing consumer value. We will continue to develop solutions that advance health, the environment and safety. We will produce more products that enhance national and energy security and the lives of Americans. And we will strive so that, ultimately, every American may enjoy the broad economic and societal benefits that come with a strong and viable American fuel and petrochemical manufacturing sector.

AFPM is dedicated to communicating these powerful messages to all of our key audiences. In 2012, we successfully enhanced our education and outreach programs. We strengthened media outreach capabilities and increased work with coalitions and partners to advance our message and achieve our desired goals. We're also working more closely with our members to educate and engage their employees.

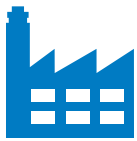
We are only at the beginning of what promises to be an exciting time of renewal for our country. We are proud of the role that our association and member companies play in this renewal. Together we will continue to educate, inform and activate to bring the benefits of America's Manufacturing Renaissance to everyone.

Oil, natural gas and the products derived from them are the engines that power the U.S. economy. Today, America's fuel and petrochemical manufacturers directly and indirectly employ nearly two million people.

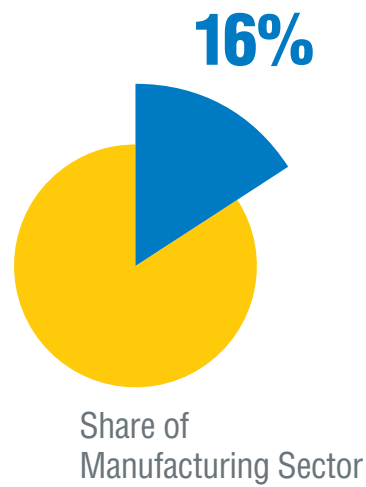
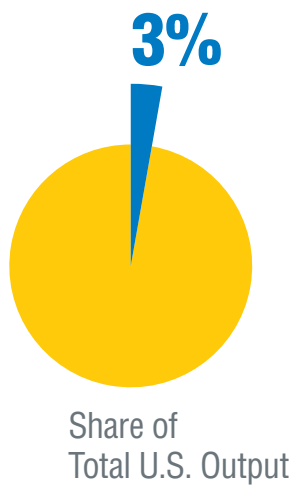
With ingenuity and enhanced technologies, the United States is on the cusp of a manufacturing renaissance that will invigorate the economy; create permanent, high-paying jobs; foster North American energy independence; and strengthen national security. Innovations in oil and gas production promise to create as many as three million jobs by the end of the decade, and to grow the

economy through billions of dollars in capital investments and increased tax revenues at the local, state and federal levels.

AFPM is actively engaged in this pivotal era for our nation, from the wellhead to Washington. With smart policies in place we can unleash our abundant reserves of oil and natural gas, process them in the most sophisticated, technologically advanced refineries and petrochemical facilities in the world and transform our country, creating significant opportunities for growth in manufacturing and the many industries it supports.



AFPM MEMBERS DRIVE U.S. ECONOMY: \$881 BILLION CONTRIBUTED TO 2011 ECONOMIC OUTPUT



Source: Bureau of Economic Analysis,
Gross Output by Industry

EXPANDING ECONOMIC BENEFITS & AMERICAN JOBS



MAKING LIFE IN THE 21ST CENTURY POSSIBLE



American fuel and petrochemical manufacturers are strategic suppliers of products that positively impact our daily lives.

U.S. fuel producers keep America on the move, providing reliable, efficient and cost-effective fuels. As the lifeline of many industries, U.S. petrochemical manufacturers produce the materials essential for products

that enable ongoing innovations in areas such as medicine, technology, defense and entertainment. They extend our lifespan, and expand the possibilities of how we live and enjoy our lives.

AFPM will continue to support a better future for America – and provide Products for Your Life. Every Day.

OIL & NATURAL GAS ARE THE BUILDING BLOCKS FOR 1000s OF PRODUCTS



STRENGTHENING ENERGY INDEPENDENCE NATIONAL SECURITY

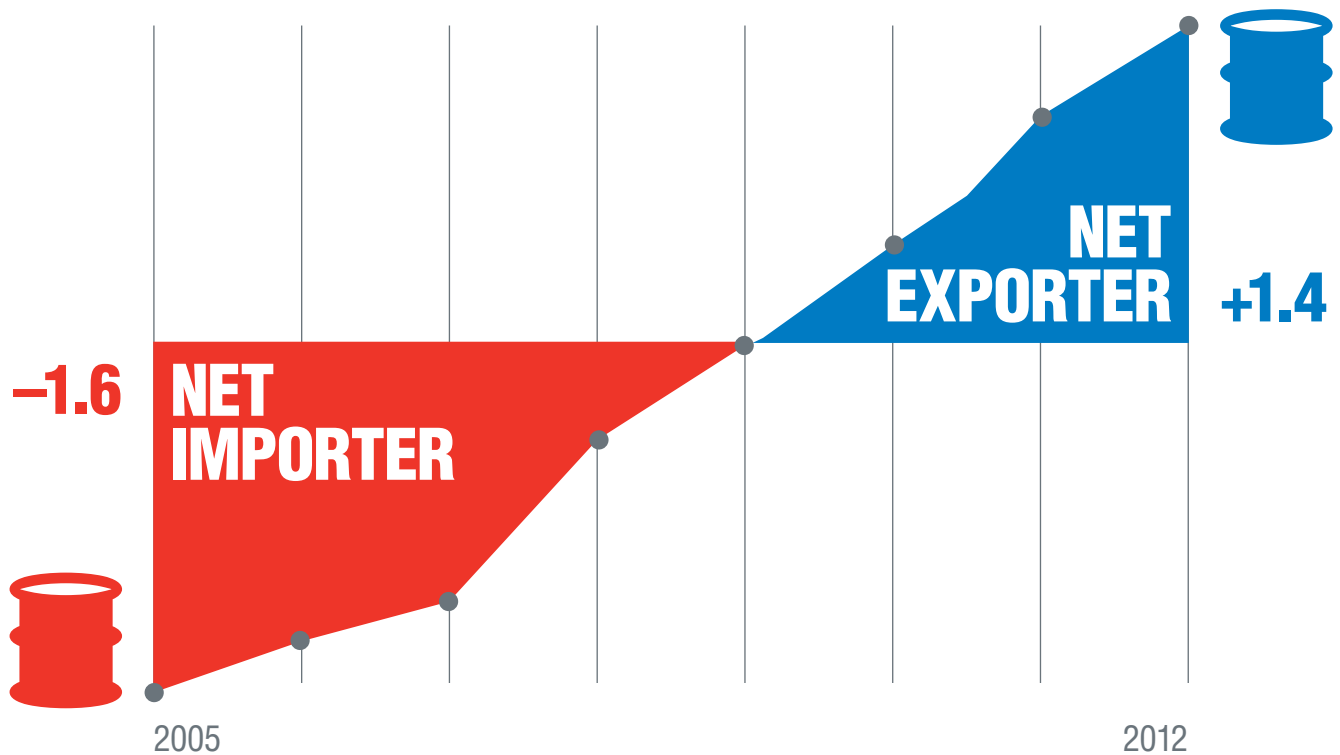
Energy independence is both an economic and national security issue. Keeping billions of dollars flowing within the U.S. economy, while significantly reducing America's reliance on other regions of the world for critical products, are goals that are not only desirable, but also achievable. Since the 1970s, eight American Presidents have called for such an effort.

The U.S. now finds itself on a pathway to attaining North American energy independence, economic prosperity and enhanced national security through more efficient manufacturing of finished petroleum products and an increase in domestic gas and oil production.

America's refiners are producing more than ample supplies of high-quality refined petroleum products to meet the nation's needs and maintain a strategic inventory. The ability to compete in a global market and offer additional products overseas is helping to reduce the U.S. trade deficit and keep these facilities operating at peak efficiency and full employment. An American manufacturing renaissance will move us further down the path to energy independence and economic prosperity, while improving our national security.

DEPENDENCE & SECURITY

U.S. BECOMES NET EXPORTER OF PETROLEUM PRODUCTS MILLION BARRELS PER DAY



Source: Energy Information Administration
(Includes finished petroleum products and
gasoline blending components.)

Americans are enjoying the cleanest environment in decades due, in no small part, to considerable investments made by the refining and petrochemical manufacturing industries. AFPM members are committed to providing better products that meet or exceed consumer demand and environmental requirements. Since 1990, our industry has invested over \$137 billion to improve environmental emissions.

We complement initiatives to produce cleaner fuels and reduce emissions with support for sustainability programs. AFPM and many of our members are engaged in a partnership with the Wildlife Habitat Council (WHC) to make a positive change to the environment, locally and globally, through conservation efforts and community engagement.

We will fuel this American manufacturing renaissance while remaining strongly committed to stewardship of the nation's environmental resources.



INVESTING IN CLEAN FUELS & CLEAN AIR

ENVIRONMENTAL INVESTMENTS
U.S. REFINERS
1990-2008


AIR
\$83.2B

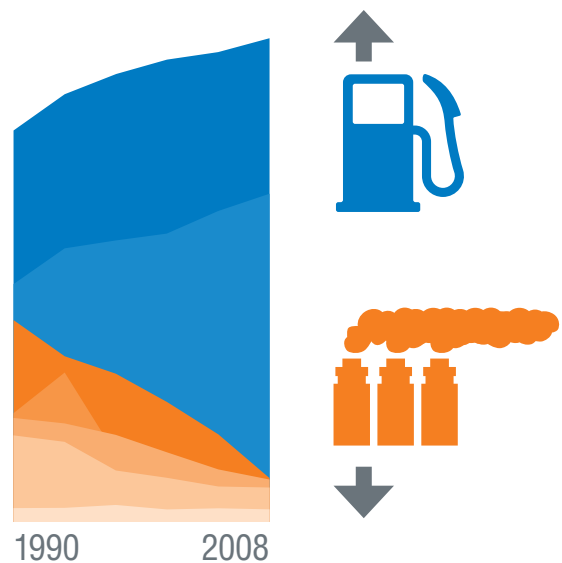

WATER
\$16.4B


WASTE
\$6.6B


OTHER
\$5.7B

Source: Outsourcing US Refining?
The Case for a Strong Domestic
Refining Industry, Wood Mackenzie

FUEL PRODUCTION
INCREASING
WHILE EMISSIONS
DECREASING



Source: An Examination of Historical
Air Pollutant Emissions from
US Petroleum Refineries, Thomas P. Nelson

**PROVIDING
A CLEANER
ENVIRONMENT
AND BETTER
PRODUCTS**



ADVANCING A SAFER WORKPLACE



The refining and petrochemical manufacturing industries are dedicated to protecting the health and safety of our workers, our contractors and our neighbors as well as the environment in which we operate. In fact, today's refining and petrochemical manufacturers lead the entire U.S. manufacturing sector in personal safety.

Driven by the fundamental belief that no incident is acceptable, AFPM members continuously strive

for opportunities to enhance safety performance. Through a number of programs, technical conferences, networking meetings and reliable and accurate benchmarking surveys, we look for ways to continue to advance our members' safety programs.

AFPM and our members are always working together to achieve the safest environment for employees and surrounding communities.

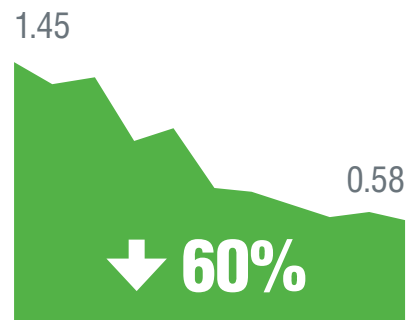
RATE OF INJURY & ILLNESS ON THE DECLINE 2001–2011

RATE PER 100 FULL TIME EMPLOYEES



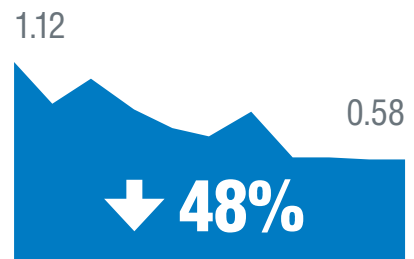
PETROLEUM REFINING

AFPM Report of Occupational Injury & Illness for
Petroleum Refining Companies and Onsite Contractors



PETROCHEMICAL MANUFACTURING

AFPM Report of Occupational Injury & Illness for
Petrochemical Manufacturing Companies and Onsite Contractors



Executive Committee

AFPM is governed by a Board of Directors, which comprises representatives from each of our refining and petrochemical members.

When the Board is not in session, it delegates authority to the AFPM Executive Committee to provide oversight and govern the Association.

The Board of Directors elects a chairman, vice chairman, eleven vice presidents and a treasurer. These officers, together with the immediate past chairman, constitute the Executive Committee. The Board elects a president to serve as chief operating officer of the Washington, D.C.-based staff and headquarters office.

The 2013 AFPM Executive Committee following this year's Annual Meeting is as follows:



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Executive Vice President
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Dallas, TX



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Senior Vice President,
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and Compliance
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Advocacy and Safety Programs

Advocacy

AFPM's Advocacy group combines the Government Relations, Regulatory Affairs, Legal, Communications and Outreach Departments to work together to inform, educate and advocate to external audiences on behalf of AFPM members.

The Government Relations Department communicates with members of Congress and their staffs.

The Regulatory Affairs Department represents AFPM member interests before federal regulatory agencies and the Executive branch.

The Legal Department provides support to all AFPM advocacy activities and advances AFPM's advocacy agenda through the federal and state courts.

The Communications Department works with the news media to publicize AFPM positions and activities, writes material for AFPM's website and produces other written material about AFPM.

The Outreach Department works with AFPM members and their employees, along with groups and individuals around the country that support and want to advocate AFPM's positions to government officials at the local, state and federal levels.

Safety Programs

AFPM's comprehensive safety programs are focused on promoting occupational and process safety incident prevention in the petroleum refining and petrochemical manufacturing industries.

Advancing Process Safety

In 2012, we launched new programs to advance process safety improvements by providing industry with more opportunities to communicate and share experiences and knowledge – vital components of our collective goal to improve process safety performance. Information on the programs is located at www.afpm.org/Safety-Programs or contact Lara Swett at lszett@afpm.org.

Safety Statistics

For more than 30 years, AFPM has collected occupational injury and illness data from our members' facilities in order to compile the AFPM Survey of Occupational Injuries & Illnesses. In 2011, AFPM began collecting facility data on Tier 1 and Tier 2 Process Safety Events to drive process safety performance improvements. This data is compiled into an annual AFPM Process Safety Event Statistics Report. Companies utilize the aggregated data in these reports as a vital tool in benchmarking their performance in both occupational and process safety.

Awards & Recognition

The AFPM Safety Awards Program honors member companies whose facility operations and contractors meet a level of excellence based on records kept for employees in accordance with the Occupational Safety & Health Administration (OSHA) record keeping requirements and ANSI/API RP 754 Process Safety Performance Indicators for the Refining and Petrochemical Industries.

The Distinguished Safety Award is presented each year to the facility or facilities that have attained a superior safety performance throughout the year and shown continuous improvement from previous years. This award, along with the others, is presented during the Safety Award Celebration held in conjunction with the National Occupational and Process Safety Conference each spring.

For more information or questions concerning the Safety Statistics, Awards Program or the National Occupational and Process Safety Conference, please visit the AFPM website at www.afpm.org/Safety-Programs or contact Anna Scherer at ascherer@afpm.org.

Publications

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

AFPM's online store allows you to search technical papers and reports by keyword, author, and/or meeting and directly download to your computer. Learn more at www.afpm.org/publications.

Newsletters and General Publications

- Annual Report
- AFPM Member Newsletter
- Daily Alert
- Fuel Line
- Green Room Report
- Security Watch
- Tech Update

Statistics

- Annual Survey of Occupational Injuries & Illnesses
- U.S. Refining Capacity Report
- Lubricating Oil and Wax Capacity Report
- Process Safety Event Report

Subscription Publications

The AFPM Petrochemical Programs has a new, secure online data portal to give all survey participants and subscribers a centralized site for submitting, viewing and analyzing the statistics reports that can be accessed from anywhere at any time. To view the Petrochemical Statistics Publications listing, visit <http://afpm.org/petrochemical-statistics/>

Technical Papers

- Annual Meeting Papers
- Reliability & Maintenance Conference Papers
- Environmental Conference Papers
- National Occupational and Process Safety Conference Papers
- Clean Fuels Challenge Papers
- Plant Automation and Decision Support Conference Papers
- International Lubricants & Waxes Meeting Papers

Transcripts

- Q&A and Technology Forum
- Biennial Cat Cracker Seminar Q&A

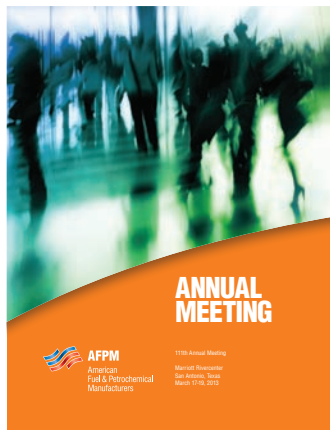
Meetings

AFPM is widely recognized for organizing national conferences and meetings held annually that are devoted to examining the critical issues facing fuel and petrochemical manufacturers. These comprehensive, information packed meetings offer a wide array of opportunities for member participation from all levels of company personnel.

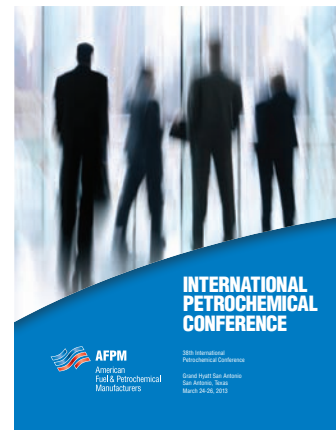
In addition to the annual line-up of conferences, AFPM periodically hosts meetings on timely topics, alone or in conjunction with government agencies, other trade associations and industry groups.

Each meeting focuses on a different discipline and is organized around general sessions, panel discussions, workshops, roundtable discussions, vendor exhibitions and numerous networking activities.

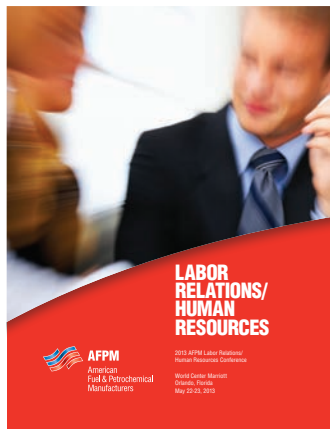
At the meetings, critical information and industry practices are exchanged to help members meet the challenges of modern business. Specific program information on AFPM's meetings may be found at www.afpm.org/meetings.



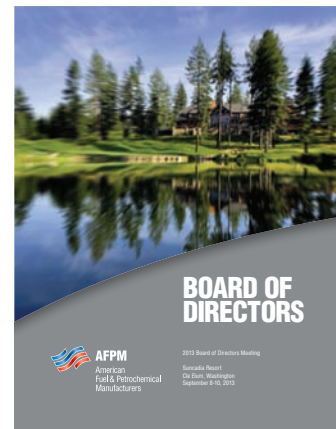
Annual Meeting
March 17 - 19
Marriott Rivercenter
San Antonio, TX



International Petrochemical Conference
March 24 - 26
Grand Hyatt
San Antonio, TX



Labor Relations/Human Resources Conference
May 22 - 23
World Center Marriott
Orlando, FL

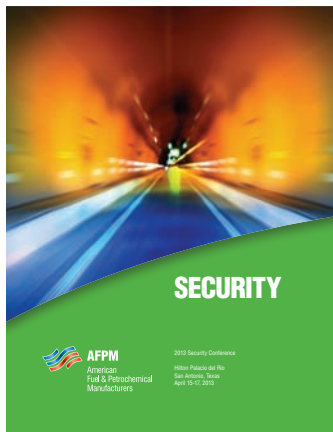


Board of Directors Meeting
September 8 - 10
Suncadia Resort
Cle Elum, WA

MEMBERSHIP JOIN TODAY!

The vast majority of American petroleum refiners and petrochemical manufacturers, along with hundreds of industry service companies, are already members of AFPM.

To find out more contact LaToya Blackburn at:
membership@afpm.org
202.457.0480
www.afpm.org/benefits-of-membership



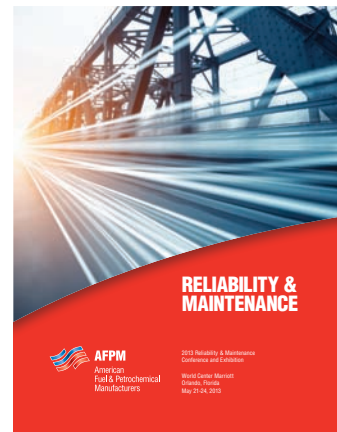
Security Conference

April 15 - 17
 Hilton Palacio del Rio
 San Antonio, TX



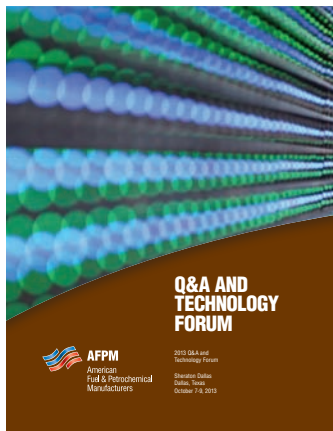
National Occupational & Process Safety Conference

May 14 - 15
 Woodlands Waterway Marriott
 The Woodlands, TX



Reliability & Maintenance Conference and Exhibition

May 21 - 24
 World Center Marriott
 Orlando, FL



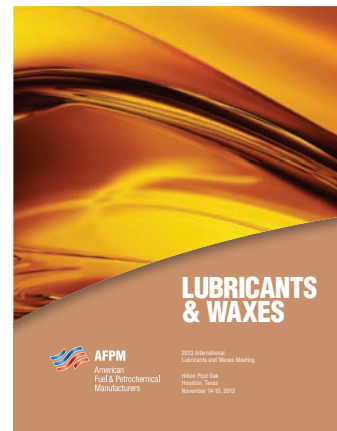
Q&A and Technology Forum

October 7 - 9
 Sheraton Dallas
 Dallas, TX



Environmental Conference

October 20 - 22
 Hilton Riverside
 New Orleans, Louisiana



International Lubricants & Waxes Meeting

November 14 - 15
 Hilton Post Oak
 Houston, TX

Standing Committees

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. There are 20 standing committees that serve to assist the Board in achieving AFPM's goals.

Please visit the AFPM website for a complete description of all committees and their rosters at www.afpm.org/committees.

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: Gregory Goff, Tesoro Corporation
AFPM Secretary: Brendan Williams

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: Jeff Davis, Brock Group
AFPM Secretary: Susan Yashinskie

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: Jim Temple, Ergon, Inc.
AFPM Secretary: Diana Cronan

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/regulations.
Chair: Cynthia Gleason, Chevron Phillips Chemical Company LP
AFPM Secretary: David Friedman

The **Fuels Committee** provides information and policy recommendations concerning legislative, regulatory and motor fuel specification developments.
Chair: Marla Benyshek, Phillips 66
AFPM Secretary: Tim Hogan

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: Jeff Reamy, Phillips 66
AFPM Secretary: Geoff Moody

The **Legal Committee** provides legal and litigation strategy recommendations to advance the interests of the Association membership.
Chair: Steve Forsyth, Exxon Mobil Corporation
AFPM Secretary: Richard Moskowitz

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: Hope VonBorkenhagen, National Cooperative Refinery Assoc.
AFPM Secretary: Daniel Strachan

The **Lubricants & Waxes Committee** provides oversight and assistance on matters related to automotive oils, lubricants and waxes.
Chair: Jamey Steinhauser, Flint Hills Resources, LP
AFPM Secretary: Daniel Strachan

The **Waxes Subcommittee** promotes the benefits of current and new wax uses and technologies to the marketplace as well as issues related to the safe handling, transportation and specifications of petroleum wax.
Chair: Greg Vascik, HollyFrontier Corporation
AFPM Secretary: Daniel Strachan

The **Maintenance Committee** promotes the exchange of technical information and proven practices on reliability, maintenance, inspection, procurement, project engineering and turnarounds.
Chair: Dan Flake, CVR Energy, Inc.
AFPM Secretary: Gordon Robertson

The **Exhibitor Subcommittee** provides overall support to the Reliability & Maintenance Conference exhibits by reviewing booth layouts and providing recommendations for continuous improvement of the show.
Chair: Tobie Craig, Turner Industries Group
AFPM Secretary: Helen Kutska

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: Steve Jackson, Hunt Refining Company
AFPM Secretary: Jeff Hazle

The **Petrochemical Committee** advises the AFPM Board and staff on current issues of importance to the petrochemical industry.
Chair: G.R. Cardillo, Enterprise Products Operating LLC
AFPM Secretary: James Cooper

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: Michael E. Williamson, ExxonMobil Chemical Co.
AFPM Secretary: James Cooper

The **Plant Automation & Decision Support Committee** focuses on sharing practical experience with the application, management, and integration of computing technology in areas including process control and automation, modeling, real-time optimization and Internet-based applications.
Chair: Michael Wroe, Enterprise Products Operating LLC
AFPM Secretary: Daniel Strachan

The **Safety and Health Committee** provides a forum for members to exchange views and share occupational and process safety best practices and developments in safety related legislation and regulation.
Chair: Mike Mayo, Enterprise Products Operating LLC
AFPM Secretary: Lara Swett

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 practices
Chair: Karen Jones,
TOTAL Petrochemicals & Refining USA
AFPM Secretary: Daniel Strachan

The **Security Committee** solicits and assembles recommendations on security-related practices and policies, standards and guidelines, and regulatory and legislative trends and ensures recommendations receive consideration by appropriate governmental bodies, industry or trade groups.
Chair: Kent Steed, Chevron Corporation
AFPM Secretary: Jeff Gunnulfsen

The **Cyber Security Subcommittee** provides information and recommendations on matters pertaining to cyber security and cyber threats.
Chair: Steve Elwart, Ergon
AFPM Secretary: Daniel Strachan

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