



**AMERICAN
FUEL & PETROCHEMICAL
MANUFACTURERS**

2014 ANNUAL REPORT

FUELING PROSPERITY





AMERICAN ENERGY POLICY AT A CROSSROADS

A MESSAGE FROM THE CHAIRMAN OF THE BOARD AND THE PRESIDENT OF AFPM

Last year, the United States became the world's top producer of oil and natural gas, a position that no one would have predicted just five years ago. As a result, American fuel and petrochemical manufacturers now have the opportunity and the ability to transform the nation's economic outlook.

Embracing the strong global demand for high-quality, affordable refined petroleum and petrochemical products, AFPM companies are putting economics and infrastructure to work. Refiners are meeting America's fuel needs, maintaining a strategic inventory and becoming a key exporter. And, petrochemical manufacturers have secured a competitive lead for the first time in more than 30 years.

The ingenuity of AFPM members to combine low cost raw materials and energy with advantages in infrastructure and diverse manufacturing capabilities is powering a manufacturing renaissance. This opportunity brings with it the promise of high-paying technical jobs and enhanced prosperity. We're on the right path to a bright future. To ensure we stay the course and reap even greater benefits that lay ahead for our country and our citizens, we must be diligent and work together.

Today, American energy policy is at a crossroads. The issues at stake and the policy decisions to be made have never been more important. A surge in regulations, coupled with a basic misunderstanding of the fossil fuel industry, hampers the ability to establish sound policies and regulations that will enable us to continue the progress we've made toward renewed economic growth.

Fossil fuels have been an essential part of our daily lives for so long that their true impact can easily be taken for granted. But make no mistake – they don't just keep us moving, they power every other industry, drive productivity, create prosperity and save lives. Eighty-one percent of the planet's energy needs are currently met by fossil fuels, according to the International Energy Agency, and that percentage is expected to hold steady for decades to come. Fossil fuels make modern life possible. They have proven their vital role and will continue to remain essential into the foreseeable future. Well-informed policies can preserve that value and continue to improve standards of living around the globe.

For the refining and petrochemical manufacturing industries, 2014 will prove to be a pivotal year. As a country, we face crucial choices as we endeavor to maintain access to affordable, reliable and secure energy sources.

Working on behalf of and in concert with our members, AFPM will continue to:

- Advocate for a regulatory environment that is straightforward and effective.
- Educate policymakers and the public to ensure the benefits of fossil fuels are accurately represented in all energy discussions and that pragmatism is not lost to politics.
- Uphold the high standards for environmental compliance, safety and innovation that have long been a hallmark of our industry.

Standing together, we will unleash the full potential of America's refining and petrochemical manufacturing industries.



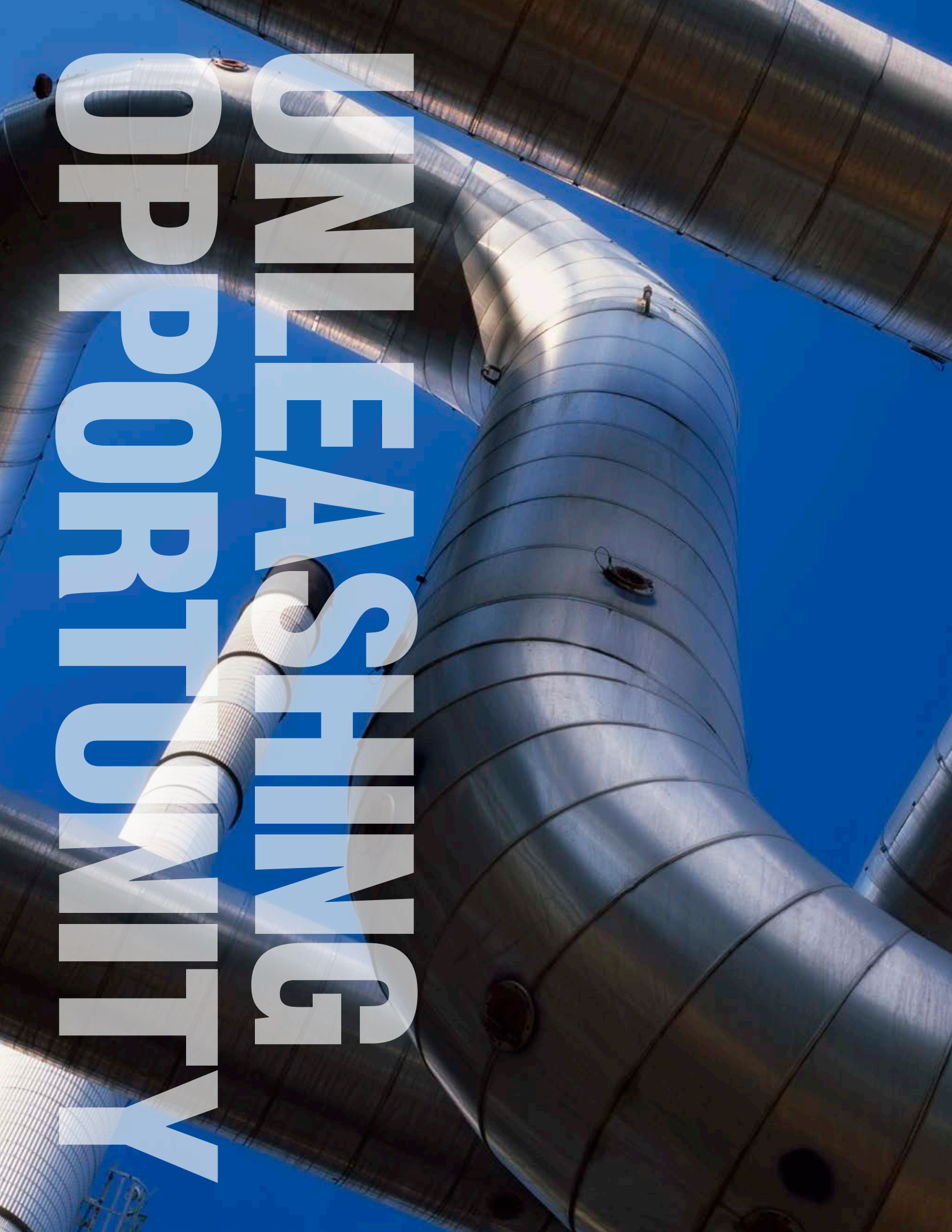
**We're proud of our industries.
We're proud of our contributions.
And we invite you to learn more.**



David L. Lamp
Chairman of the Board



Charles T. Drevna
President



UNLEASHING OPPORTUNITY

MAKING INDUSTRY MORE PRODUCTIVE AND AMERICANS MORE PROSPEROUS

America's fuel and petrochemical manufacturers have been and will continue to be the catalysts that make industry more productive and Americans more prosperous. Petroleum based fuels and products are the backbone of our economy and are predicted to remain a significant portion of our fuels mix in the future. No other fuels deliver the same combination of performance, convenience, reliability, safety and affordability.

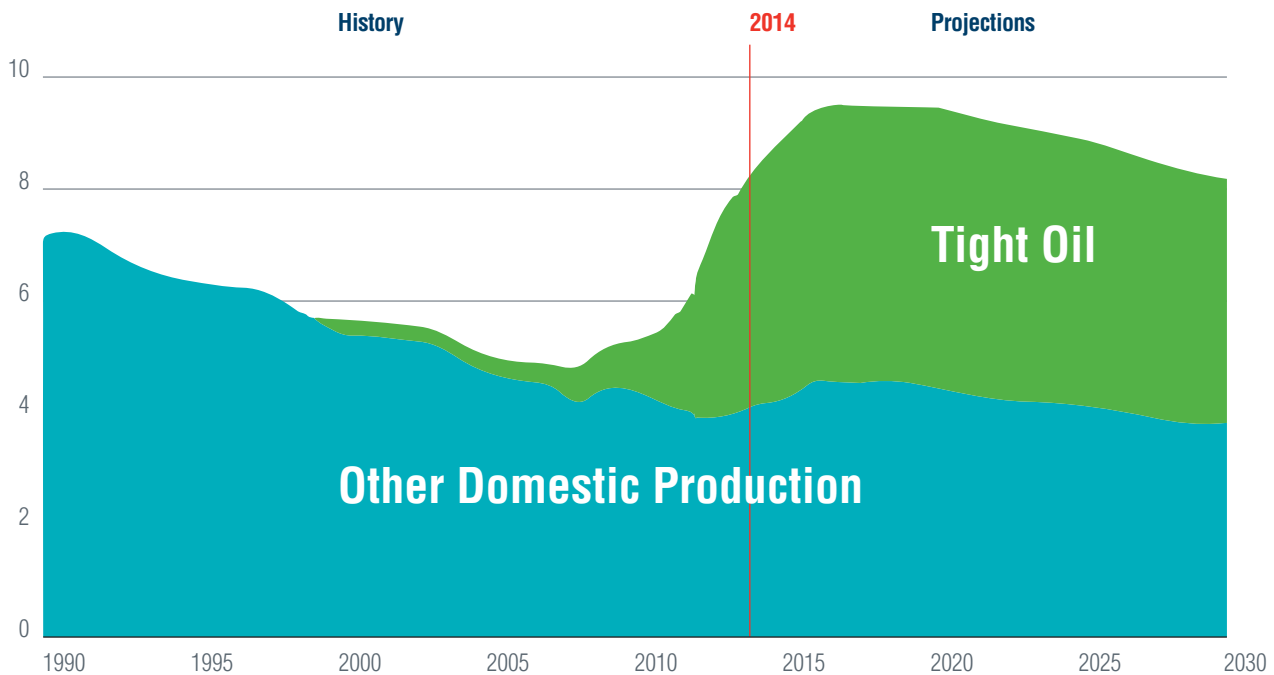
In October 2013, the United States produced more crude oil than it imported for the first time since February 1995. The increased production is a result of combining advanced technologies that

allow the extraction of oil and natural gas from sources that were once considered economically infeasible to develop, such as shale, sand and other porous rock formations. Oils coming from these newly developed resources are sometimes given distinct names such as tight oil and shale oil. But all these new oils, along with conventionally produced crude oils, are processed in our refineries into products for consumers. According to the Energy Information Agency (EIA), the United States is positioned to become the world's largest oil producer by 2017, and is on course to enhanced energy and national security as well as improved balance of trade.



Oils coming from newly developed resources are processed in our refineries into products for consumers.

U.S. CRUDE OIL PRODUCTION IS RAPIDLY EXPANDING MILLION BARRELS PER DAY



Note: Other domestic production includes lower 48 offshore, Alaska and other lower 48 onshore.
Source: EIA, Annual Energy Outlook 2014 Early Release

ABUNDANT NATURAL RESOURCES AND ADVANCED TECHNOLOGIES SPUR GROWTH

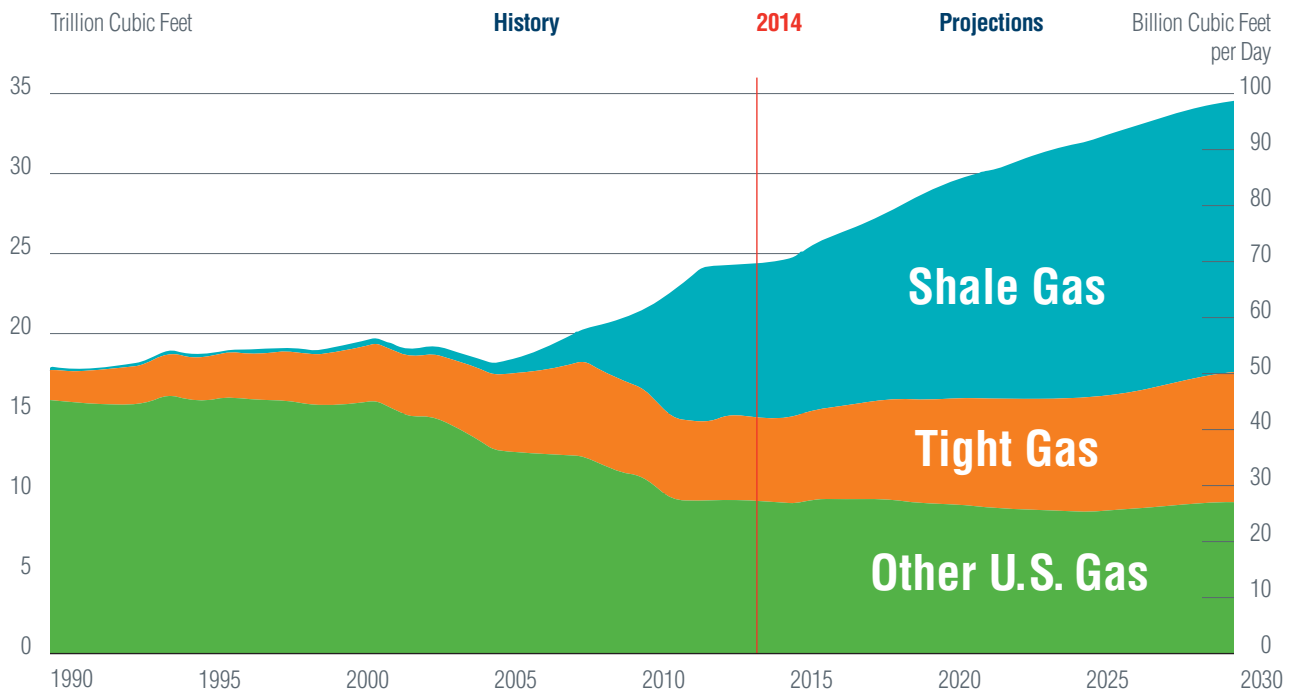
At the same time, we have unleashed abundant natural gas and liquids reserves through shale development and technology advances. Once considered inaccessible, newly developed resources such as shale gas and tight gas have given the U.S. petrochemical industry its best competitive advantage in more than 30 years. These new supplies of natural gas and liquids have created affordable energy and petrochemical feedstocks, enabling our nation's manufacturers to flourish.

Through the ingenuity and industriousness of our member companies, we are able to make use of these vital natural resources more efficiently, more safely and cleaner than ever before.

Newly developed resources have given the U.S. petrochemical industry its best competitive advantage in more than 30 years.



NATURAL GAS SUPPLIES ARE GROWING U.S. DRY NATURAL GAS PRODUCTION



Note: Other U.S. gas includes: Non-associated onshore, non-associated offshore, Alaska, gas associated with oil and coalbed methane.

Source: EIA, Annual Energy Outlook 2014 Early Release

ENVIRONMENTAL AND SAFETY PERFORMANCE CONTINUE TO EXCEL

Our members are strongly committed to clean air, water and waste reduction; have an outstanding record of compliance with the Environmental Protection Agency and other regulatory bodies; and have invested hundreds of billions of dollars to dramatically reduce emissions as measured by the EPA. As a result of these emissions reductions, criteria pollutants have been significantly reduced over the past three decades.

Safety is also a priority. Rates of injury and illness have declined significantly due to a concerted effort by refiners and

petrochemical manufacturers to enhance safety performance through programs, technical conferences, meetings and benchmarking surveys. These industries are collaborating to develop joint performance metrics for process safety, to share information on incidents and causal factors to lessen the chances of repeat at other facilities and to ensure that potential hazards are identified before they become incidents.



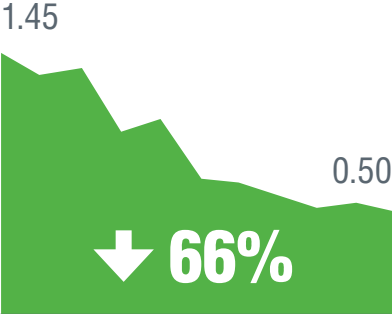
RATE OF INJURY & ILLNESS ON THE DECLINE 2001–2012

RATE PER 100 FULL-TIME EMPLOYEES



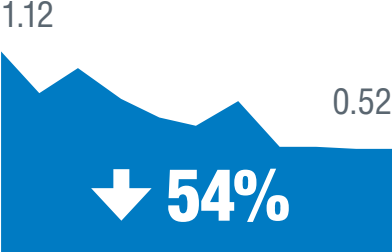
PETROLEUM REFINING

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



POWERING A MANUFACTURING RENAISSANCE



THE BOOM IN OIL AND GAS DEVELOPMENT ARE GAME CHANGERS FOR THE MANUFACTURING SECTOR

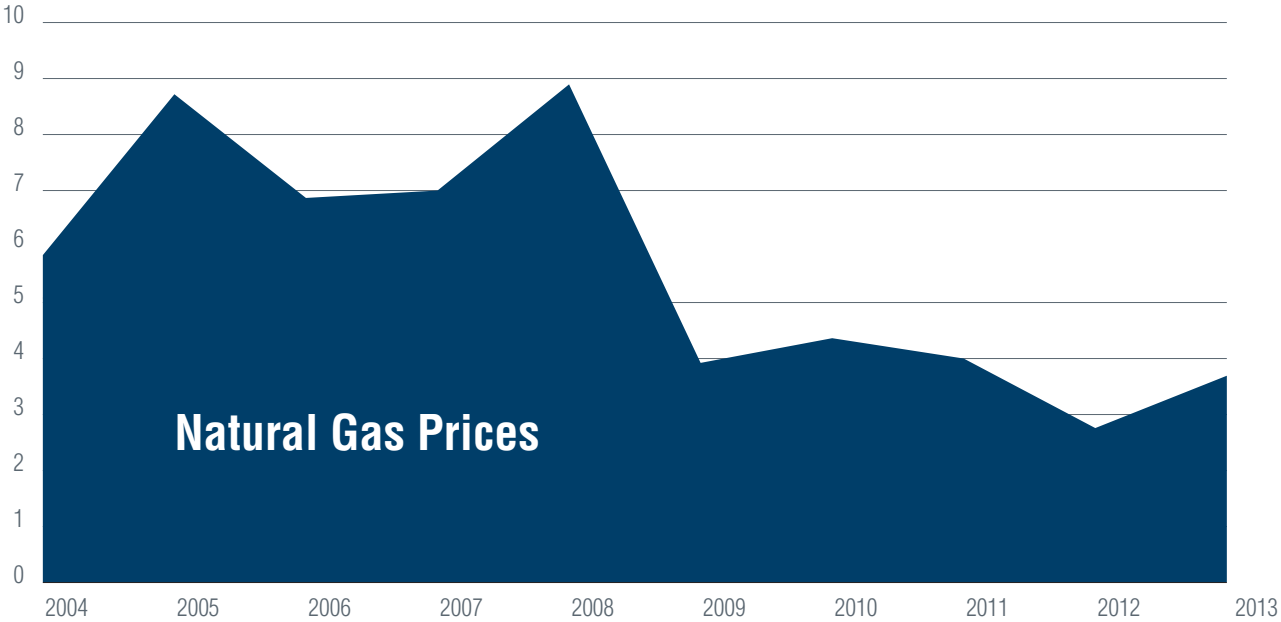
The shale revolution and a boom in other unconventional oil and gas development are game changers for the manufacturing sector, driving down both the cost of energy and the cost of important feedstocks like ethane. This abundance of affordable natural resources, combined with advanced manufacturing infrastructure, high-tech distribution networks and the ability to innovate quickly, puts America in a competitive position in chemical manufacturing for the first time in decades. The result has been a dramatic reversal from the mid-2000s, when the United States was one of the world's most expensive locations for manufacturing chemicals, to

today when it is among the most affordable. International chemical companies are taking notice and have announced planned or possible investments in the United States worth more than \$91 billion.

According to IHS Global Insight, by 2025, nearly 3.9 million manufacturing jobs will be supported by unconventional oil and gas development and, along with energy-related chemicals activity, will contribute nearly \$533 billion annually to the GDP.

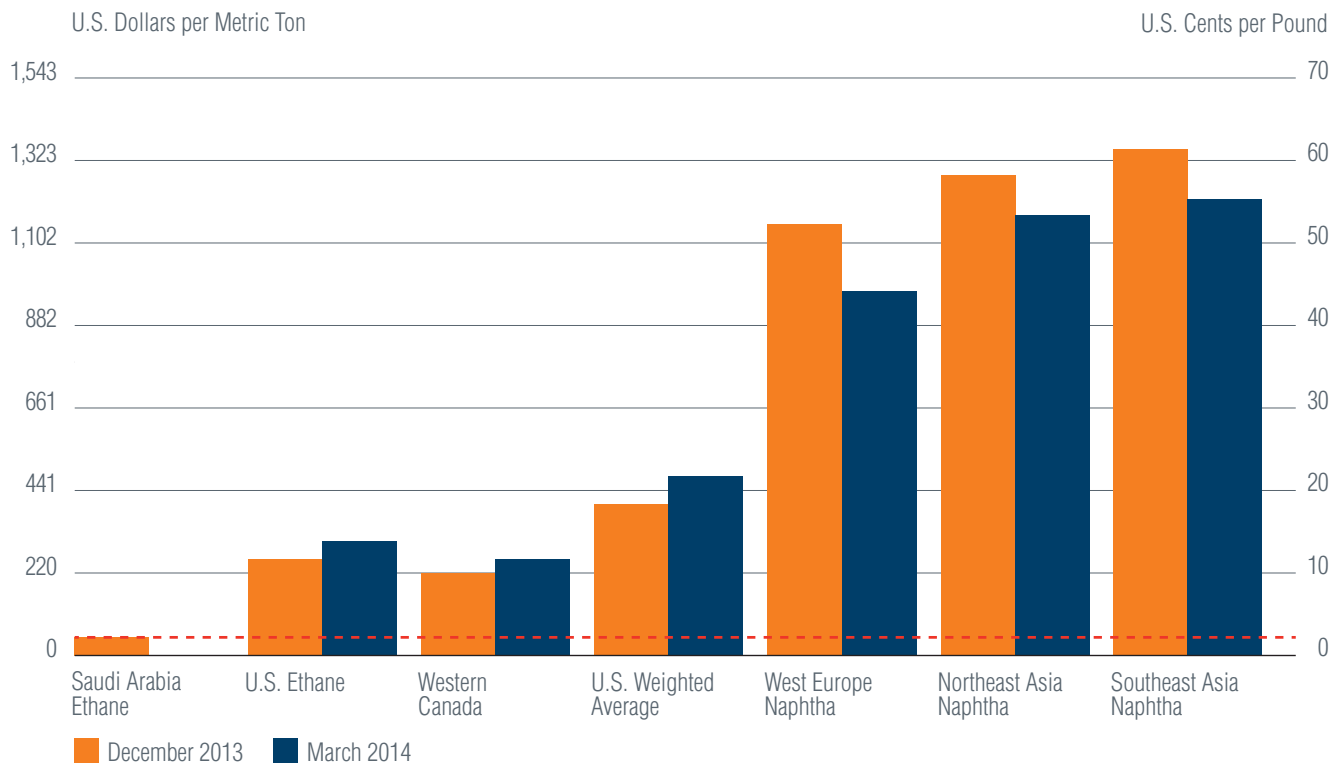
FALLING NATURAL GAS PRICES HELP DRIVE U.S. MANUFACTURING COMPETITIVENESS

DOLLARS PER MILLION BTU



Source: Henry Hub spot prices as compiled by EIA

LOW-COST ETHANE FEEDSTOCKS STRENGTHEN U.S. GLOBAL POSITION



Note: Ethylene is one of the most important petrochemicals and is produced in North America using low-cost ethane, making the region far more competitive in petrochemical manufacturing than other regions.

Source: IHS Chemical

\$1 = \$1.48

A vibrant petrochemical manufacturing sector lifts the rest of the manufacturing sector, since petrochemicals are a key component of the supply chains for many other industries. The ripple effect continues as a strong overall manufacturing sector fosters a robust and stable economy, providing Americans with well-paying jobs that are key to our way of life.

According to the National Association of Manufacturers, every \$1.00 spent in the U.S. manufacturing sector overall returns \$1.48 to the economy, the highest multiplier effect of any economic sector. In addition, workers receive nearly 20 percent more in pay and benefits, compared to workers in non-manufacturing sectors.

AFPM members are committed to the realization of a manufacturing renaissance. After a decade of almost zero capacity expansion in U.S. petrochemicals manufacturing, shale development is spurring growth. Many of our members are investing billions of dollars in manufacturing capacity to harness vast new supplies of natural gas liquids for cost-effective petrochemical production and in new technologies to improve efficiency and reliability.

LAYING THE GROUNDWORK FOR NEW MANUFACTURING INFRASTRUCTURE

However, potential roadblocks, including capacity constraints in the U.S. construction industry and permitting processes, may impede our ability to realize the full potential of a manufacturing renaissance. In order to address potential barriers, AFPM has formed the American Shale and Manufacturing Partnership (ASMP). This group will lay the groundwork for the development of more than \$100 billion in announced new manufacturing infrastructure across the nation during the next decade by identifying which policies should be addressed to bring manufacturing back to the United States.



This multi-stakeholder initiative brings industry, academia, non-governmental organizations (NGOs), labor and government together to focus on shale development and its impact on American manufacturing. To guide its efforts, the ASMP has identified five key areas that are crucial to spur economic growth, job creation and global competitiveness for years to come:

1. **Federal and State Policies** that create an attractive business environment and eliminate regulatory uncertainty.
2. **Environmental Practices** to ensure the industry continues to provide better products while meeting or exceeding environmental requirements.
3. **Infrastructure Plans** supported by streamlined access to construction capacity, equipment and permits.
4. **Workforce Development** to communicate the benefits of a career in the industry and ensure availability of a well-trained labor pool.
5. **Research and Innovation** to continue developing new products and processes that will spur ongoing industry growth.

The ASMP will release its recommendations and roadmap to a renewed manufacturing sector in early 2015.



ASMP Members

- Allegheny Conference
- American Fuel & Petrochemical Manufacturers
- America's Natural Gas Alliance
- Carnegie Mellon University
- Claude Worthington Benedum Foundation
- Consumer Energy Alliance
- Cynthia and George Mitchell Foundation
- International Association of Bridge, Structural, Ornamental & Reinforcing Iron Workers
- National Association of Manufacturers
- NorTech
- Pennsylvania Environmental Council
- Society of Chemical Manufacturers and Affiliates
- Texas A&M Engineering
- U.S. Chamber of Commerce Institute for 21st Century Energy

ASMP brings industry, academia, non-governmental organizations (NGOs), labor and government together to focus on shale development and its impact on American manufacturing.

U.S. REFINERIES ARE AMONG THE MOST EFFICIENT AND SOPHISTICATED IN THE WORLD

American refiners are responding to a changing landscape characterized by increased U.S. energy production and reduced domestic demand for traditional gasoline. Continued strong global demand for petroleum-based fuels and favorable economics are allowing U.S. refiners to fulfill domestic fuels needs, while selling more finished product abroad than ever before.

U.S. refineries are among the most efficient and sophisticated in the world and can produce any petroleum product currently required worldwide – even those

designed to meet the most stringent air quality requirements such as ultra-low-sulfur diesel. Their access to relatively inexpensive domestic and Canadian crude oils, together with low-priced natural gas to fuel their facilities, is giving U.S. refiners a competitive edge in the export market. This confluence of events has allowed American refiners to quickly adapt to changing conditions and to capture market share from refineries in Europe, India and China.

According to the EIA, U.S. refiners exported a record 2.8 million barrels per day of products in 2013, almost 40 percent more than in 2010.

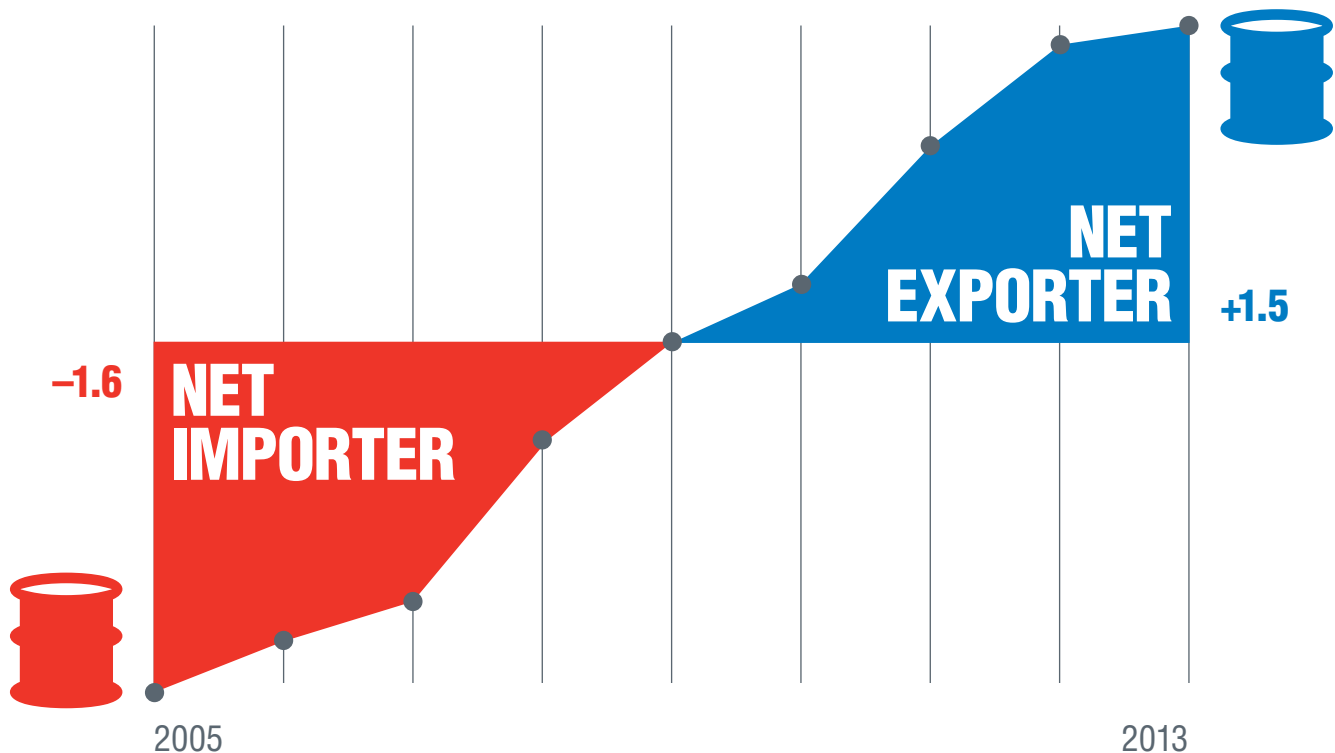
While domestic demand for traditional gasoline is on the decline, demand for diesel fuel here and abroad is rising. Regions like South and Central America are increasingly turning to the United States as a supplier of diesel fuel that complies with their new air-quality standards.

Low sulfur diesel fuel exports rose again in 2013 to levels well over five times what they were in 2005. The largest increases in volumes for 2013 went to Europe, a region that requires very low sulfur diesel fuel.



U.S. IS A NET EXPORTER OF PETROLEUM PRODUCTS

MILLION BARRELS PER DAY



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



MOBILIZING THE AVIATION

U.S. FACILITIES AIM TO RUN AT PEAK EFFICIENCY AND FULL EMPLOYMENT

U.S. refiners are investing to improve their competitive advantage in light of changing demand and crude oil opportunities. AFPM members are upgrading operations, for example with hydrocracking, to meet rising diesel demand and to achieve greater agility to meet demand for fuels of the future in an environmentally compliant manner. Taking advantage of the growing abundance of North American crude oil, U.S. refiners are adding coking and other crude processing capacity to deal with greater volumes of heavy and light crude oils.

The energy boom and the ability of U.S. refiners to address demand shifts means reduced American reliance on oil from unstable regions abroad, and the opportunity for U.S. facilities to run at peak efficiency and full employment.

AFPM members are upgrading operations to meet demand shifts in an environmentally compliant manner.



U.S. PRODUCT EXPORTS HELP ADDRESS GLOBAL DEMAND

DISTRIBUTION OF U.S. EXPORTS

**34% CENTRAL/
SOUTH AMERICA**
22% EUROPE
16% MEXICO
14% ASIA PACIFIC
8% CANADA
4% AFRICA
2% MIDDLE EAST

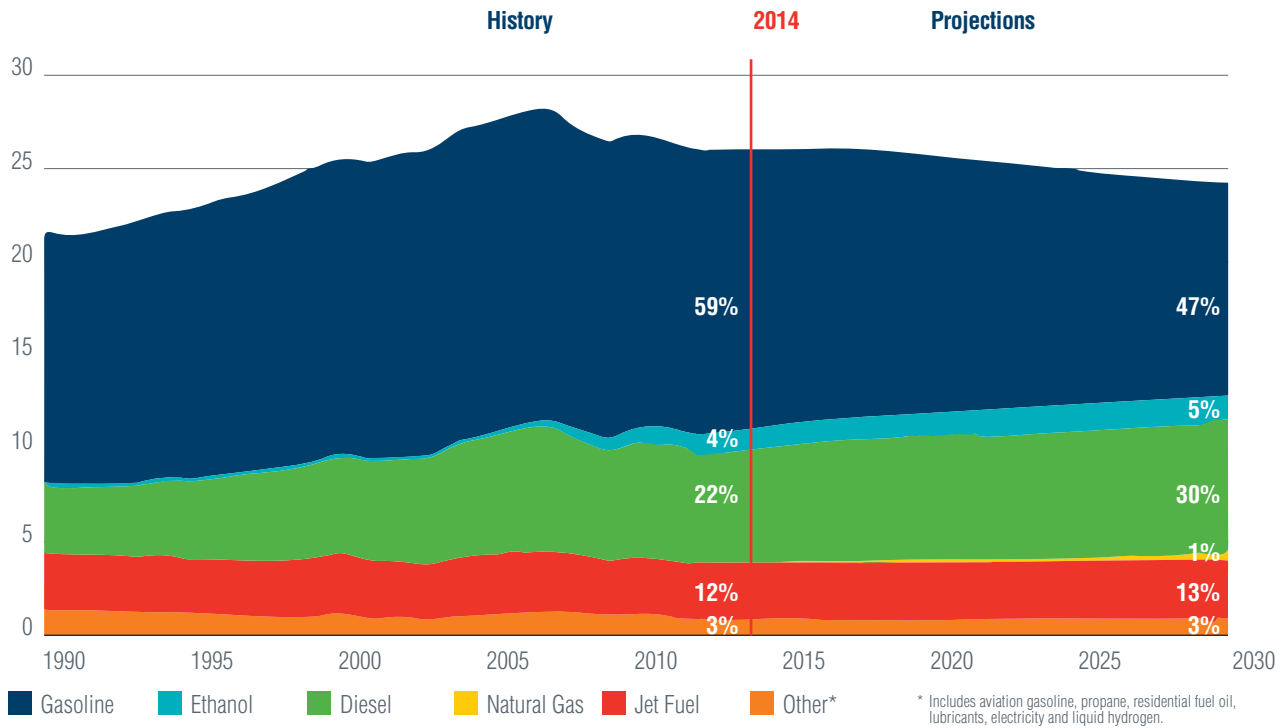
100% TOTAL



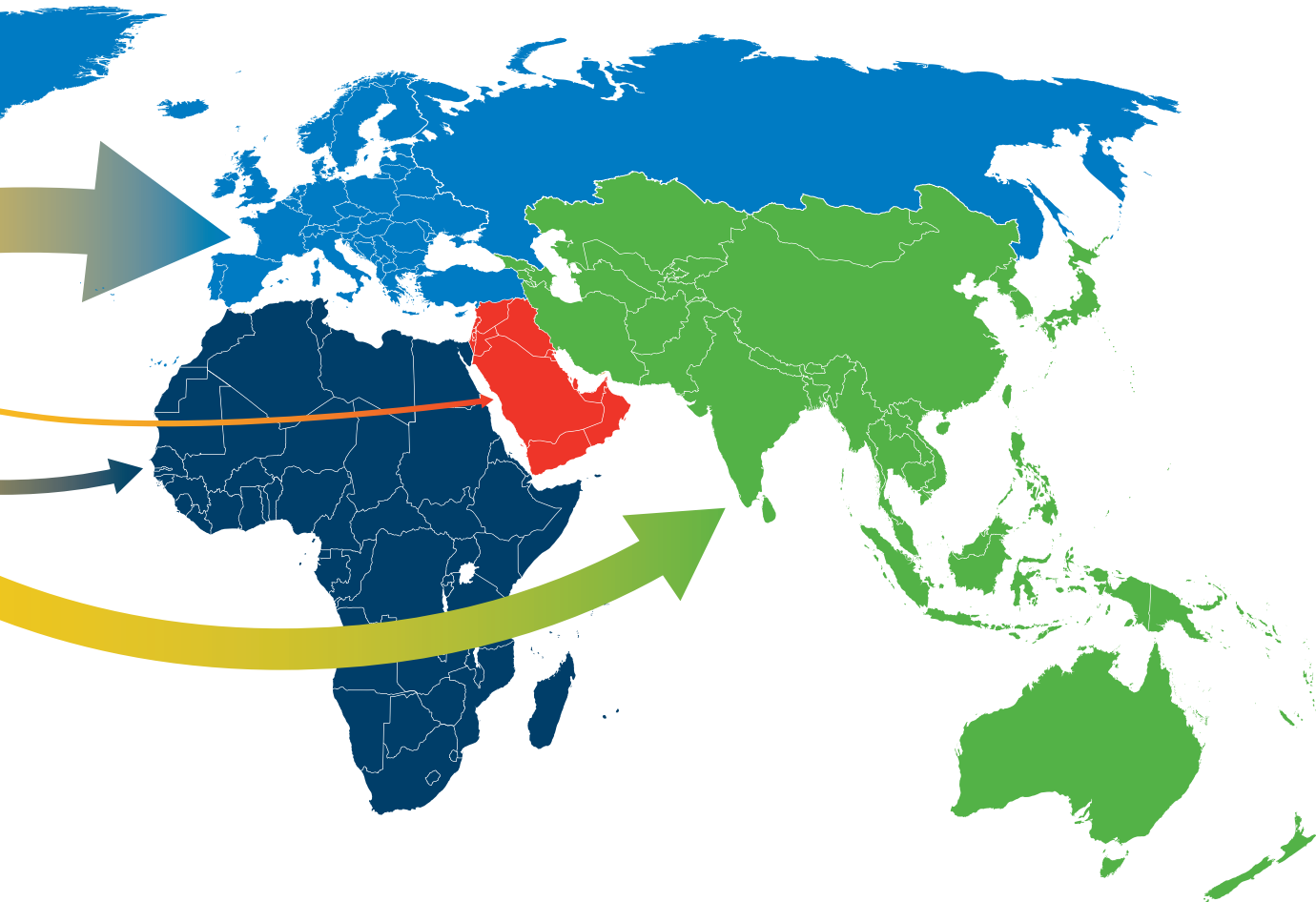
Source: Energy Information Administration
(Includes finished petroleum products and gasoline blending components.)

U.S. GASOLINE DEMAND IS DECLINING, DIESEL INCREASING

TRANSPORTATION ENERGY CONSUMPTION BY FUEL / QUADRILLION BTU



Source: EIA, Annual Energy Outlook 2014 Early Release



EDUCATING AND ADVOCATING FOR INVESTMENT AND GROWTH

AFPM represents approximately 98 percent of the American refining and petrochemical industries. As such, our agenda is simple – to educate and advocate before Congress, federal regulatory agencies, state governments and in the media in support of energy policies that achieve our shared objectives:

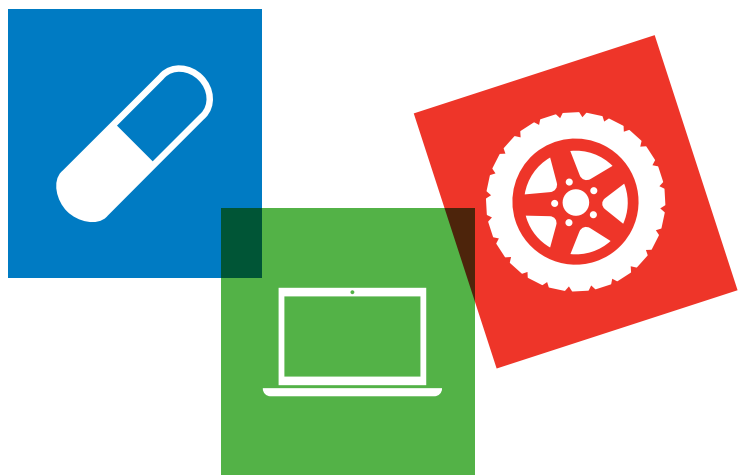
- A level playing field for all industries consistent with a free market economy.
- Regulations that are simple, effective and efficient and are harmonized among jurisdictions.
- Improved energy and national security.
- Increased economic growth and competitiveness.
- Better fuels and products that improve lives.

Attaining these objectives will not just benefit our industries, but many other industries as well and, ultimately, the consumer. To succeed, we are working to ensure that the public fully understand the positive impact our manufacturers and refiners have on life in the 21st century, and to educate policymakers so that they can define policies that make America the best place to innovate, invest and grow. Specifically, we are focused on:

- Fuels policies that are rational, sustainable long-term solutions that bring certainty to fuels markets and that truly reflect an all-of-the-above energy strategy with equal consideration for traditional and alternative sources. We can start by repealing or significantly reforming the federal biofuel mandate, the Renewable Fuel Standard.
- Environmental and other regulations that are predicated on the notion that benefits should outweigh costs and that analysis should be based on sound data and science developed through a transparent process. The Social Cost of Carbon calculation should be revisited and policymakers should explore how to address increasingly contradictory and conflicting regulations.

- A national tax policy that treats all manufacturers fairly and makes the United States an attractive place to manufacture goods for worldwide use.
- Free market policies that recognize and encourage America's new role as a global energy leader.
- Modern chemical policies that are informed by the latest scientific developments to balance risk and benefits while promoting innovation and preserving job creation.
- Workforce initiatives that address the mismatch between the skills manufacturers require to support a manufacturing resurgence and those seeking jobs with family-supporting wages.
- Cybersecurity policies that reflect today's reality in which shared threat intelligence and best practices are critical to combat cyber attackers increasingly motivated to disrupt critical infrastructure.
- Safety programs that enable refining and petrochemical manufacturers to continue to lead the entire U.S. manufacturing sector in personal safety.

AFPM is working to educate the public and policymakers on the positive impact our manufacturers and refiners have on life in the 21st century.





PROMOTING SOUND POLICY

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 2014 AFPM Executive Committee following this year's Annual Meeting is as follows:



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Gary Yesavage
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Lawrence Ziemba
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ENGlobal Mike Harrison	Gulfspan Industrial, LLC Myron Smalley	Interchem USA Roberto Dahlgren	Lucite International Inc. Robert Connolly	Oiltanking Bo McCall
ENVIRON International Corporation Andrew Edwards	Hagemeyer North America - Technical Services Dale Rudloff	Interek PARC	Lummus Technology Helion Sardina	Old World Industries, LLC James Bryan
Environmental Resources Management Kenneth Weiss	Hahn & Clay Don B. Sheffield	Invensys Maxie Williams	MAHLE Industrial Filtration Steve Franke	Omni Vision International, Inc. Richard Park
EnviroSystems Inc. Robert Schwichtenberg	Haldor Topsoe, Inc. Henrik Rasmussen	ioMosaic Corporation Georges Melhem	Masterank America Inc. Janet Jordan	Onis Inc. Jean-Francois Favreau
Eurecat U.S. Incorporated Frederic Jardin	Hargrove Engineers + Constructors Ralph Hargrove	Irex Contracting Group John Lambertson	Matheson Lori McDowell	Opportune LLP Jose Rangel
Evergreen Industrial Services Diana Roye	HartEnergy Publishing, LP Kristine Klavers	J.J. White, Inc. James White	Matrix Service Company Leslie Windler	OSIsoft J. Patrick Kennedy
Excel Modular Scaffold Dylan Fulton	Haverly Systems, Inc.	Jacobs Engineering Group Inc. Carlos Camacho	McJunkin Red Man Corporation Elaine Michael	ParFab Field Services Frank Wolfe
Exel Timothy English	Helm AG Volker Seebeck	JCL Safety Services James Lefler	McKinsey & Company Khush Nariman	PCI Consulting Group John Ockerbloom
Fellon-McCord & Associates, LLC Brian Habacivch	Hertz Equipment Rental Corporation James Fiscus	Johnson Matthey Catalysts Jamie Chisamore	MEA INC Townes Comer	PCL Industrial Construction Co. Kent Free
Firestone Polymers Mark Rymmer	HOERBIGER Compression Technology Jim Johnson	JV Industrial Companies David Herzog	Meridium Inc. Jane Bailey	PCS Sales Troy Erny
Fisher-Klosterman Joe Urban	HTI Jeffrey Gendler	KBC Advanced Technologies, Inc. Andrew McMullan	MERRICK & Company Peter Dixon	PEI (Mercury & Chemical Services Group) Ron Radford
Flexitalllic L.P. Jim Lenahan	Hunter Buildings & Manufacturing, LP William Tucker	KBR Doug Kelly	Middough Inc. Paul Riedl	Pentair Valves & Controls Peyton Davis
Fluor Corporation Terence Easton	HydroChem LLC David Thompson	KH Neochem Americas, Inc. Toshiaki Fujima	Milestone Chemical Tankers America, Inc. Sammie Mooney	Performance Contractors, Inc. Lee Jenkins
Foster Wheeler USA Corporation Steve Beeston	IAG Jon Moretta	Kiewit Oil, Gas and Chemical Amy Nussmeier	MISTRAS Group Inc. Sotirios Vahaviolos, PhD	Perstorp Specialty Chemicals David Wolf
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Gantrade Corporation H. Aaron Parekh	Industrial Insulation Group, LLC Joe Ortiz	KP Engineering, LP William Heimbaugh	Nexidea, Inc. Philip Steed	Plant Automation Services, Inc. Monica Yoo
GP Strategies Corporation Ron Faciane	Infineum USA L.P. Steve Benwell	KPMG LLP Regina Mayor	Nooter Corporation Bernard Wicklein	Plant Performance Services LLC (P2S) Doug Theriot
GTC Technology US, LLC Jerrold Alwais	Ingenero Bill Waycaster	LANXESS Corporation Thomas O'Neill	North West Redwater Partnership (NWR)	Porocel International, LLC Terence McHugh
Guida, Slavich & Flores, P.C. Joseph Guida	Innospec Fuel Specialties LLC Patrick McDuff	LBC Houston, LP Russell Crawford	Norton Engineering Consultants, Inc. James Norton	Praxair Inc. John Panikar
		Leidos Engineering LLC Robert Perry	NovaPex Pierre Luzeau	PricewaterhouseCoopers Reid Morrison

ASSOCIATE MEMBERS

continued

Princimar Chemical Carriers, LLC Arthur Regan	SCS Energy LLC Joseph Swift	Summit Petrochemical Trading Inc. Jorge Werlang	Tricon Energy, Ltd. Ignacio Torras	Wood Mackenzie Brett Danforth
Process Consulting Services Inc. Scott Golden	Securitas Security Services USA Inc. Vincent MacNeill	Sumter Transport Company Inc. Brian Wilson	Trihydro Corporation Calvin Niss	WorleyParsons James Powers
Procter and Gamble Chemicals George Koehnke	Sentinel Integrity Solutions Mike Shaw	Sunoco Inc. Matthew Hager	Trinity Consultants, Inc. John Hofmann	Yokogawa Maurice Wilkins
Provenance Consulting, LLC Jenny Brancheau	Service Radio Rentals Chris Ferguson	Superheat FGH Services Joe Borrer	Tristar Global Energy Solutions, Inc. Meghan Kidwell	Zachry Industrial, Inc. Brandi Lambert
PSC Rick Pitman	SGS Chris Alberto	Systech Environmental Corporation Joe Durczynski	Turner Industries Group, LLC Tobie Craig	Zeeco, Inc. Stan Brander
Recon Refractory Engineering & Const. Dan Bellamy	SGS Petroleum Service Corporation Brian Haymon	T.A. Cook Amy Faulconbridge	Turner, Mason & Company Malcolm Turner	Zimmermann & Jansen, Inc. James Adams
RedGuard Tim Taton	Shermco Industries Shawn Fritts	Tauber Oil Company Richard Tauber	Tyco Integrated Security Jennifer Carey	
Refractory Construction Services Co., LLC Chris Lanclos	SI Group, Inc. Paul Tilley	TDS Rance Krech	United Rentals, Inc. Michael Abbey	
Reichhold, Inc. Joel Hambrick	Siemens Energy, Inc. - Water Solutions Thomas Schultz	Team, Inc. Phil Hawk	United Shutdown Safety Patricia Bareis	
Reliability Management Group (RMG) Matt Noble	SNC-Lavalin Hydrocarbons & Chemicals USA Dominick Trupia	Technip USA William Davie	Univar USA Inc. Brian Jurcak	
Rentech Boiler Services, Inc. Lee King	Sojitz Corporation of America Tadayuki Honda	Tecnon OrbiChem Ltd. Charles Fryer	Universal Environmental Services (UES) Juan Fritschy	
Repcon, Inc. Robert Parker	Solomon Associates, Inc. Dale Emanuel	TEDA International Inc. Wenjin Xu	Universal Plant Services, Inc. Brad Jones	
Richard Industrial Group, Inc. Richard Gaona	Sonneborn, LLC. Luther Jones	Tetra Tech, Inc. John Stevenson	URS Corporation Donald Nedanovich	
Rive Technology, Inc David Aldous	Southern Chemical Corporation Jan Spin	Texas Aromatics L.P. Melbern Glasscock	Velan Valve Corporation	
Roddey Engineering Services, Inc. Michael Newton	Spirit Environmental Jess McAngus	The Mundy Companies David Mundy	Veolia ES Industrial Services, Inc. Nancy Morris	
S&B Engineers and Constructors Ltd. J.D. Slaughter	SPX Cooling Technologies Shane Taysom	Third Coast International Jim Clawson	Veolia Water Kathleen Murray	
Safway Group Karla Cuculi	Stancil & Co. Jeffrey Nichols	Total Energy Corp. Robert Armentano	Vopak Terminals North America Inc. Dick Richelle	
Sage Environmental Consulting Steve Probst	STARCON International Inc. Dale Kuntz	Total Lubrication Management Traci McConnell	Waid Environmental Jason Graves	
Saint-Gobain NorPro Jorgen Pedersen	Stolt-Nielsen Limited William Humphreys	Total Safety U.S., Inc. Dave Fanta	Weaver Wade Watson	
Samsung Engineering America Inc. Howard Feintuch	Structural Group, Inc. Peter Emmons	Toyota Tsusho America, Inc. Takashi Fujiwara	Willbros Tyson Hickey	
Savage Jason Ray	Sulfur Operation Support, Incorporated Strom Smith	Trammo, Inc. Chemicals Division Jim Amaroso	William W. Rutherford & Associates Bill Rutherford	
Scheck Mechanical Corporation Joseph Lasky	Sulzer Chemtech USA, Inc. Rodney Alario	Transfield Services Summer Austin	Wood Group Field Services, Inc. Steve Pairish	
		TRC Gwen Eklund	Wood Group Mustang Vikas Moharir	

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 lswett@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>

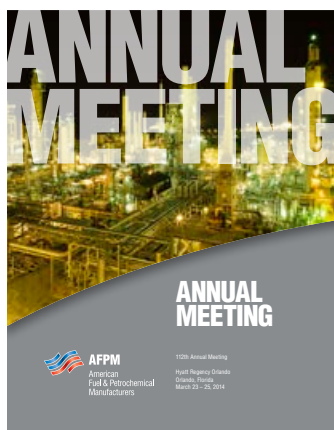
Technical Papers

- 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

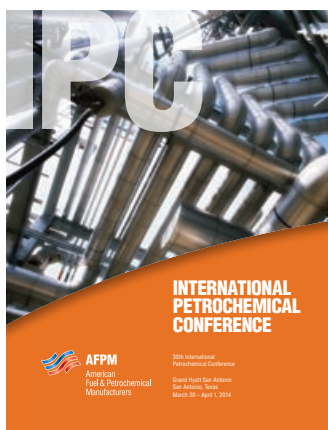
Transcripts

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

MEETINGS



Annual Meeting
Hyatt Regency
Orlando, Florida
March 23 – 25, 2014



International Petrochemical Conference
Grand Hyatt
San Antonio, Texas
March 30 – April 1, 2014



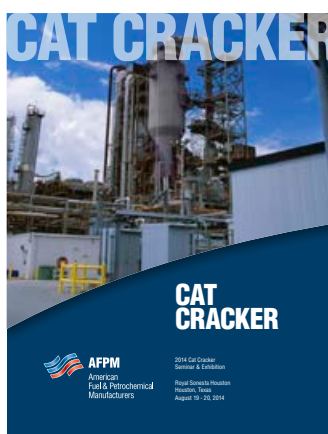
Security Conference
Hilton Palacio del Rio
San Antonio, Texas
April 14 - 16, 2014

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.

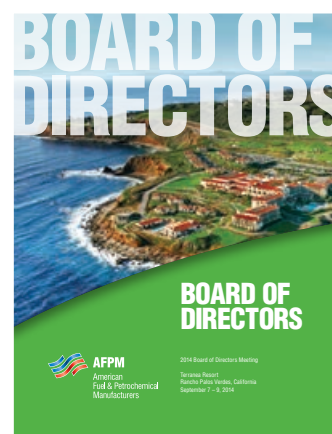
In addition to the annual line-up of conferences, AFPM periodically hosts meetings on timely topics, alone or in conjunction with government agencies, other trade associations and industry groups.

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

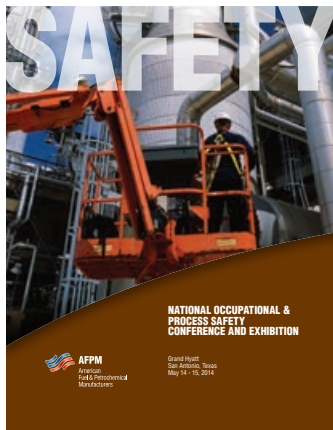
At the meetings, critical information and industry practices are exchanged to help members meet the challenges of modern business. Specific program information on AFPM's meetings may be found at www.afpm.org/meetings.



Cat Cracker Seminar
Royal Sonesta Houston
Houston, Texas
August 19 - 20, 2014



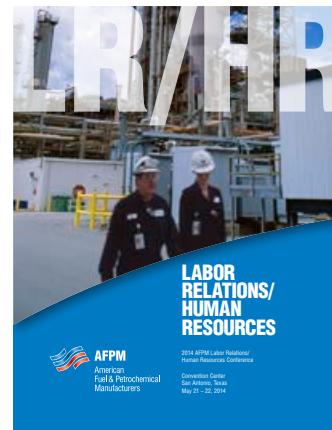
Board of Directors Meeting
Terranea Resort
Rancho Palos Verdes, California
September 7 – 9, 2014



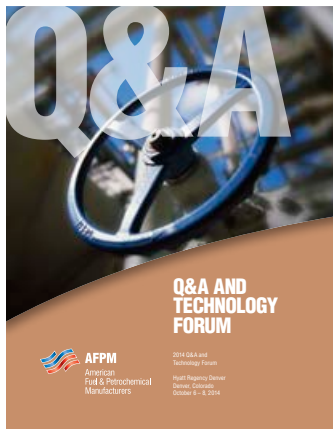
National Occupational & Process Safety Conference
Grand Hyatt
San Antonio, Texas
May 14 - 15, 2014



Reliability & Maintenance Conference and Exhibition
Convention Center
San Antonio, Texas
May 20 - 23, 2014



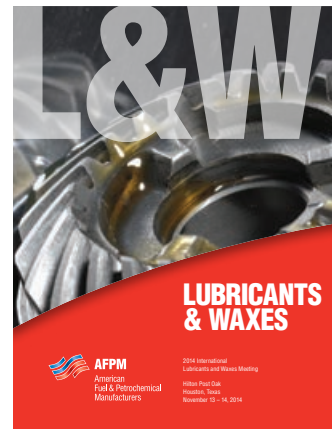
Labor Relations/Human Resources Conference
Convention Center
San Antonio, Texas
May 21 - 22, 2014



Q&A and Technology Forum
Hyatt Regency Denver
Denver, Colorado
October 6 - 8, 2014



Environmental Conference
Marriott Rivercenter
San Antonio, Texas
October 19 - 21, 2014



International Lubricants & Waxes Conference
Hilton Post Oak
Houston, Texas
November 13 - 14, 2014

MEMBERSHIP
JOIN TODAY!

THE VAST MAJORITY OF AMERICAN PETROLEUM REFINERS AND PETROCHEMICAL MANUFACTURERS, ALONG WITH HUNDREDS OF INDUSTRY SERVICE COMPANIES, ARE CURRENTLY MEMBERS OF AFPM.

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

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: Dave Sander, Chevron
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 VonBorckenhagen, 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: Janet Jordan, Masterank America Inc.
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: Brad Hase, Flint Hills Resources, LP
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: James Stump, HollyFrontier Corporation
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: Melissa Hockstad

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: Melissa Hockstad

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: Willis Jernigan, Flint Hills Resources, LP

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 U.S.A. Inc.

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, Inc.

AFPM Secretary: Daniel Strachan

STAFF

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President

David N. Friedman
Vice President, Regulatory Affairs

Melissa S. Hockstad
Vice President, Petrochemicals

Sarah K. Magruder Lyle
Vice President, Strategic Initiatives

Richard S. Moskowitz
General Counsel

Gerald R. Van De Velde
Chief Financial Officer

Brendan E. Williams
Senior Vice President, Advocacy

Susan E. Yashinskie
Vice President,
Member Relations & Development

Rebbie Riley
Executive Assistant

Rebecca Adler
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Laura Berkey-Ames
Manager, Government Relations

Michael Birsic
Manager, Government Relations

LaToya Blackburn
Coordinator, Membership

Yvette Brooks
Coordinator, Technical Programs

James Cooper
Senior Advisor, Petrochemicals

Tanya Cooper
Coordinator, Conference Programs

Diana Cronan
Director, Communications

Tanji Davis
Accounting Assistant

Wade Easter
Director, Accounting & Office
Administration

Jeff Gunnulfsen
Director, Security & Risk Management

Jeff Hazle
Senior Director, Refining Technologies

Steve Higley
Director, Outreach

Tim Hogan
Director, Motor Fuels

Kimberly Steimel Howard
Specialist, Communications &
Social Media

Jenessa Jensen
Registrar

Helen Kutska
Senior Director, Convention Services

John Manansala
Accountant/IT Support

Geoff Moody
Senior Director, Government Relations

Katharine Nessler
Exhibit Coordinator

Elizabeth Olds
Specialist, Outreach

Gordon Robertson
Manager, Technical Programs

Valentia Royal
Manager, Human Resources

Rose Sabijon
Manager, Petrochemical Programs

Anna Scherer
Manager, Safety Database

Eileen Scherzinger
Manager, Safety Regional Networks

Angela Segura
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Joanne Shore
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Andriy Shvab
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Erica Sieg
Administrative Assistant, Advocacy

Daniel Strachan
Director, Industrial Relations & Programs

Lara Swett
Director, Health & Safety Programs

Sandra Tarquinio
Coordinator, Communications

Colleen Van Gieson, CMP
Manager, Meetings

Merla Zollinger
Manager, Convention Services

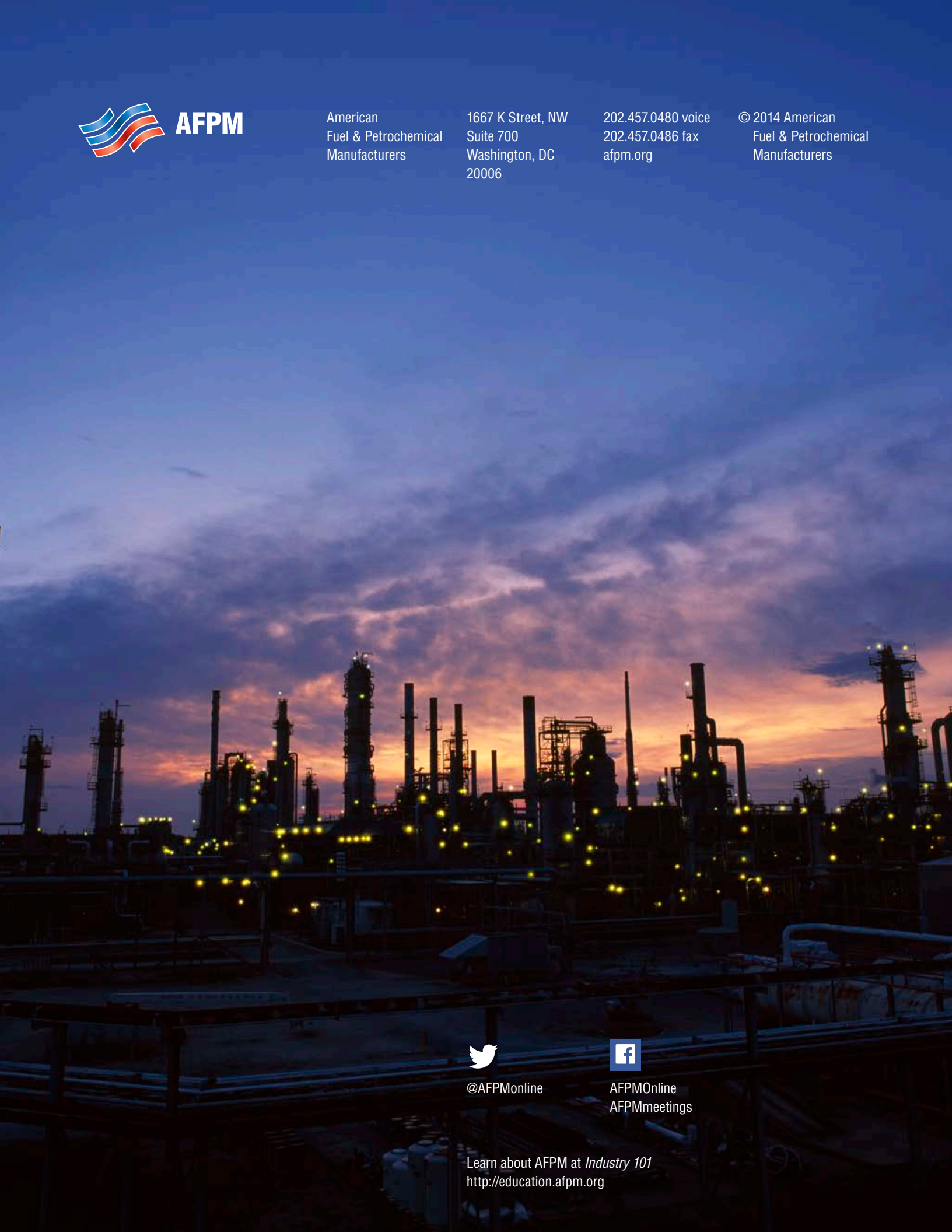


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