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Dear Oilheat Retailer:

To address the recent stress placed on Oilheat due to market price and supply volatility and Hurricane Katrina, we have prepared a Question and Answer document designed to help you, your employees, and customers better understand what is happening to the price of oil and how the retail company fits into the overall world energy market. This document can be very helpful in responding to questions raised by the press. We are also providing state specific data sheets, so that the information will be relevant in your market.

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## OILHEAT: THE NATIONAL PICTURE

Retail Oilheat Businesses	Sales (000's)	Annual Payroll (000's)	Employees
<b>9,193</b>	<b>\$ 16,187,101</b>	<b>\$1,730,184</b>	<b>99,811</b>

Data Sources: U.S. Census Bureau, Retail Trade Summary Statistics for 2002; U.S. Energy Information Administration; Industry Data Compilation  
 Sales Data = Oilheat volume x avg. price for no. 2 distillate heating oil for 2003 (exclusive of any taxes) as reported by Energy Information Administration, plus a 6% allowance for HVAC sales.

### Over 9.5 million households in the USA use heating oil.



**Occupied housing units in USA = 105.4 million**

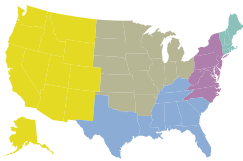
**Over 9.5 Million use Oilheat**

**It is estimated that over 24.5 million consumers in nation benefit from Oilheat each year**

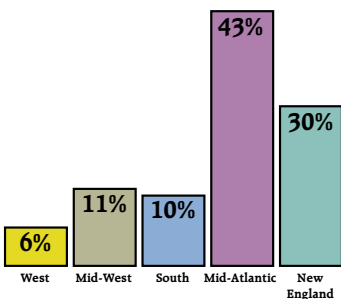
Based on average of 2.6 or more persons per household

**Total Oilheat Volume = 11.27 Billion Gallons**

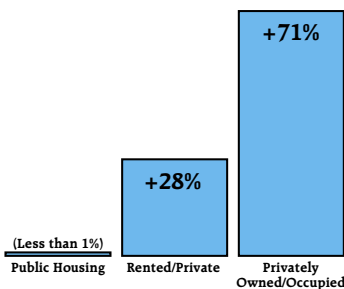
Oilheat Volume = Residential and Commercial Sales of Distillate Fuel Oil and Kerosene for 2003



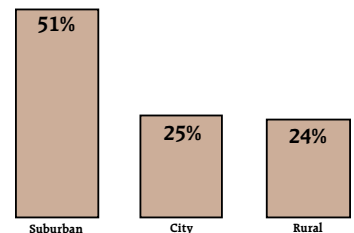
#### REGIONAL SHARE OF THE USA OILHEAT MARKET



#### OWNERSHIP OF OILHEAT HOMES



#### LOCATION OF OILHEAT HOMES



# Key Oilheat Facts & Figures

Oilheat Dealer Talking Points To Consumers and the Media

Presented In Question & Answer Format

## Petroleum Supply & Pricing

### **Q1. Why has a barrel of crude oil soared in price?**

There are several factors causing the price of crude oil to reach historic levels:

The strengthening economies in the United States and the industrial world have increased demand for crude oil. Demand in the United States is approximately 5 percent greater than it was in 1997, when the United States economy was expanding rapidly. Demand in the industrial world has also expanded by approximately five percent in that time period.

China's economy has been expanding rapidly, putting pressure on demand for a number of commodities. Since 2000, Chinese demand for petroleum has grown by nearly 25 percent.

Crude oil production throughout the world expanded greatly in the 1990's and early 2000's. In the early 1990's, average production of crude oil throughout the world was 66 million barrels per day. Currently worldwide production is over 72 million barrels per day.

However, there is limited refining capacity in the United States and current environmental laws make it very difficult to build new domestic oil refineries. Therefore, when domestic oil refining is interrupted by a storm of intensity and magnitude, such as Hurricane Katrina, the weakness in U.S. refining capacity is exposed.

Hurricane Katrina is currently having a strong impact on prices for gasoline and natural gas. According to the U.S. Energy Information Agency (EIA), nearly 95 percent of the crude production in the Gulf of Mexico was shut down due to Hurricane Katrina. The Gulf of Mexico and Louisiana supply approximately 12 percent of the crude supplied in the United States. Fortunately, the heating oil market is part of an international supply and distribution chain, and much of this supply will be made up in world markets. As of September 15th, 56 percent of oil production was shut down.

But with natural gas, according to the EIA, nearly 88 percent of natural gas production was shut down due to the hurricane. Louisiana and the Gulf of Mexico supply nearly 25 percent of the U.S. demand. Additionally, natural gas supply is threatened because it may only be imported at special facilities, and the worldwide market for natural gas is still developing. As of September 15th, 34 percent of daily production was shut down.

#### **In summary:**

The rise in heating oil and all energy prices can be pegged directly to the meteoric and historic rise in crude oil prices the past 18 months. Last year at this time, crude oil was selling for about \$44 dollars per barrel on the NYMEX; while the wholesale price for heating oil was about \$1.15 cents on the NYMEX. Today crude oil is hovering at about \$65.00 dollars per barrel and the wholesale price for heating oil is about \$1.90 per gallon. Your local Oilheat dealer has no control over the worldwide factors that influence these prices including geopolitical events, weather patterns and worldwide petroleum demand.

### **Q2. Why have heating oil prices risen sharply?**

First, it is important to realize that heating oil is not the only energy source experiencing price hikes. Prices for all home heating fuels including natural gas, propane and electricity have moved upward during the past several months.

The energy markets are impacted daily by worldwide activities such as geopolitical events, weather related

*(more, next page)*

occurrences and economic matters. Hurricane Katrina is a perfect example of this phenomenon. Retail Oilheat dealers have no control of these factors.

The main reason behind the recent spike in heating oil prices is the meteoric and historic rise in the price of a barrel of crude oil. Over the past 18 months, crude oil prices have risen from the mid-\$30 per barrel level to \$70 per barrel. When crude oil prices go higher, all refined products that come from a barrel of crude – gasoline, heating oil, diesel fuel, kerosene and jet fuel – will cost more.

### **Q3. What is the current average price for a gallon of heating oil?**

Current prices can be found at this site starting in October, as they are tracked for the winter season:  
[http://www.eia.doe.gov/oil\\_gas/petroleum/info\\_glance/distillate.html](http://www.eia.doe.gov/oil_gas/petroleum/info_glance/distillate.html)

### **Q4. How does the current price for a gallon of heating oil compare with the price at this same time last year?**

In some areas, the price is currently 60 percent higher than last year.

### **Q5. What do you recommend consumers do to combat higher energy costs?**

Heating oil consumers should first talk with their heating oil retailer about the appropriate program for their household. These options may include budget plans or improvements to their systems. If appropriate, pre-buy or contracted buying may be recommended.

The best strategy continues to be conservation. NORA has completed a 160 page training guide “Efficient Oilheat, An Energy Conservation Guide” which is the foundation for NORA Gold Certification for Oilheat service personnel. This program educates technicians on energy conservation strategies ranging from simple thermostat replacements to system redesign, including boiler replacements and how to analyze the energy savings for consumers. It also includes information on how to explain these energy improvements to the customer. Working with customers, energy costs can be lowered by 20-25 percent for many customers. Energy conservation can effectively be achieved by nearly all consumers at reasonable cost.

NORA estimates that replacement of an older boiler that is burning 1200 gallons of oil per year could save nearly a third of the oil consumed and bring the house down to the national average of 800 gallons per year. If the party was paying \$2.50 per gallon, this would save nearly \$1,000 per year. Another way of looking at it is to say that the boiler conversion essentially lowered the cost per gallon by 33 percent or to \$1.65 per gallon.

Less expensive modifications such as insulating pipes and ducts can save 5 percent per year, and even a modest tune-up may save 3 percent. For a house using 1000 gallons, these changes will pay for themselves in a short time.

### **Q6. Are heating oil companies gouging consumers?**

In the view of noted energy analysts, heating oil dealers are simply passing along the steady increases in heating oil that have been occurring for the past year. The extreme spikes in heating oil cannot be absorbed by the local Oilheat dealer. The Oilheat industry has worked, and will continue to work, with state regulators to make sure that consumers are not harmed by price gouging.

### **Q7. How much more will it cost to heat your home with oil this year vs. last year?**

It is difficult to place an exact dollar or percentage figure on how much more consumers will pay this winter to heat their homes. So many factors can impact long term home energy costs including price changes in the

world's energy markets and the severity of winter weather patterns. It does appear certain however, after viewing the price of energy products delivered at a later date – the futures market – that all homeowners will be paying more this winter to heat their homes.

### **Q8. Will there be enough heating oil for consumers this winter?**

Currently, heating oil inventories in New England and around the country are quite strong according to data collected regularly by the American Petroleum Institute (API) and the U.S. Energy Information Agency (EIA). Last week they were 6.6 percent larger than the previous year, and on the east coast they were 12 percent higher. These are the largest inventories held in storage since January 2004. If we experience a normal winter pattern this heating season, there should be plenty of heating oil to meet the needs of Oilheat customers.

### **Q9. There have been numerous reports about oil companies earning large profits. Who's making money in this market and how?**

It has been reported that some major oil companies have recorded significant profits recently. We can't fully explain the profit structure of these companies and how they buy, refine and sell petroleum products because we do not have that information.

But what we do know is that local Oilheat dealers are small independent business operations that are not a part of the operations of major oil companies. Heating oil dealers are doing their best to provide fuel to their customers today at the best price possible given the volatility in world energy markets — markets that dealers have no control over.

### **Q10. Why is it that refined petroleum prices rise so quickly, but do not seem to drop as fast even when crude oil prices fall?**

Heating oil is traded on world markets, like the NYMEX here in the U.S. It is bought and sold along with other petroleum products such as diesel fuel and gasoline. There is greater demand for diesel fuel and gasoline than heating oil, but since these products are all part of the overall petroleum market, heating oil is often impacted by the elevated wholesale prices for diesel fuel and gasoline. These prices may not drop as fast as crude oil because they are all “finished” products that have entered the downstream market after being refined from crude oil that was secured earlier, very possibly at higher prices.

### **Q11. Explain the Strategic Petroleum Reserve (SPR) and the Regional Petroleum Reserve.**

The Strategic Petroleum Reserve is an inventory in the U.S. of 700 million barrels of crude oil that can be released by the President during emergency conditions. President Bush recently released some of the reserve to help meet the country's petroleum demands following Hurricane Katrina.

There is also a 2 million barrel reserve of heating oil stored in multiple locations in the northeast. That product can be released by the President if there is an actual disruption in supply, or when the price for heating oil increases rapidly compared to crude oil.

Established within the last decade, the heating oil reserve has never been called upon. In nearly a century of service to homeowners, through wars, cold weather and snowstorms, the Oilheat industry has always delivered fuel to homes.

## **Oilheat Dealer Operations**

### **Q12. Describe price cap and fixed price programs.**

A fixed price program is first developed when an Oilheat dealer secures heating oil contracts for his/her customers on the wholesale market for a specific price. The dealer then adds on the overhead costs of running the business (employee wages & benefits, insurance, vehicles, rent, etc.), as well as a profit margin.

Once that price is established, the Oilheat dealer will establish a price for customers and the price is fixed for a given period of time and will never go up or down. The customer agrees to pay that fixed price even if the price for a gallon of heating oil goes up or down on the open market during the heating season.

A cap price program, on the other hand, allows for market changes. Customers can lock in a price for the entire heating season with a price cap, which is the highest price they will pay no matter how high heating oil prices may go throughout the heating season. If the retail price goes up the customer pays the cap price, but if the retail price goes down the customer pays the lower price.

With both fixed price and cap price programs Oilheat dealers sign for and are committed to contracts with their suppliers for fuel oil months in advance of the heating season. This enables the dealer to lock in a price and pass that price on to their customers. However, these programs impose a new cost on the fuel supplier, which often is later borne by the consumer.

### **Q13. What is a pre-buy plan?**

This is a “lock-in” program that can help consumers manage energy bills. Customers purchase their heating fuel in advance of the heating season, at a set pre-season price (there is a minimum purchase required). Most Oilheat dealers require a minimum purchase of 500 gallons, and that the customer be an automatic delivery customer.

### **Q14. Do you recommend that consumers sign up for these kinds of programs?**

These programs have obvious benefits for Oilheat consumers, but every customer must decide what works best for their energy needs and budget. We recommend that Oilheat customers first establish a relationship with an Oilheat dealer so that credit, budget, fuel delivery and equipment needs can be determined.

Oilheat customers must recognize that Oilheat dealers have had a difficult time this past year structuring fixed and cap price programs because of the tremendous volatility in the crude oil and energy markets. Although the Oilheat industry has built its reputation on offering fuel at very competitive rates, many dealers have been reluctant to enter into oil buying agreements with their suppliers because of this volatility.

Dealers are wary because, given the nature and past performance of the worldwide energy markets, there is concern that at some point fundamental supply and demand will trump market fear and speculation and prices will drop. In this environment, it is possible that a dealer could be stuck with contracts for high priced product in a lower priced market. Also, while dealers can hedge/protect this risk somewhat, they generally can't hedge all of it. And to hedge (protect) the risk, the premiums involved are as much as eight (8) times that of the last couple of years, making it very expensive to protect against a price drop and in many cases, impossible for Oilheat dealers to fund. The fact is that price cap programs are a huge risk and a huge expense for Oilheat dealers.

### **Q15. Do all Oilheat dealers offer these programs to customers?**

No. Many full-service Oilheat dealers will try to offer these programs to a portion of their customer base. But consumers will find that because of the volatility in the heating market this year, many companies are not offering these types of programs.

### **Q16. What is a heating oil contract?**

In order to structure a price cap, fixed price or pre-buy program on behalf of customers, retail dealers buy heating oil futures contracts in units of 42,000 gallons (1,000 barrels) with prices based on delivery in New York harbor and the New York Mercantile Exchange (NYMEX). These are the principal commercial cash market trading centers for heating oil.

### **Q17. What other fuel buying options do consumers have for Oilheat?**

A customer can buy home heating oil by paying the daily market rate. Since heating oil is a commodity that is traded on world energy markets such as the New York Mercantile Exchange (NYMEX), the price can change from day-to-day. The daily rate would reflect the most recent activity in the heating oil market. For example, a consumer could take delivery on a Monday of home heating oil at a specific price, and then the following day the price could be higher or lower.

### **Q18. What is the definition of the wholesale price for heating oil?**

The wholesale price is the price for the commodity that a heating oil company pays to their supplier(s), many of which are multi-national corporations. To establish prices, these companies generally rely on indicators found on world energy trading markets such as the New York Mercantile Exchange (NYMEX), as well as the local market conditions.

Your local Oilheat dealer has no control over the wholesale price, but will generally shop for the lowest priced product in their market. A dealer prices heating oil by reviewing all of his costs — wholesale price, all overhead or fixed costs associated with running the Oilheat business (rent, vehicle expenses, employee wages, insurance, etc.) — and local market conditions.

### **Q19. What is the difference between “automatic” delivery and “will call”?**

“Automatic” delivery means that an Oilheat dealer will automatically determine when a customer needs fuel by using degree day monitoring. The customer does not need to place a call to the dealer for a delivery. The dealer will automatically deliver fuel on a regular basis and the customer is assured of never running out of fuel.

“Will-call” means that a customer will monitor their own consumption and “will call” the dealer when a delivery is needed.

### **Q20. What’s the difference between a full-service company and a C.O.D. or discount operation?**

Full-service operation means the company provides home heating fuel, plus heating and cooling equipment sales, service, and installation. These companies also have an established place of business, operate a fleet of fuel delivery and service vehicles, employ administrative and technical employees, offer various budgeting and Oilheat buying plans, offer fuel delivery based on degree-day monitoring, are fully insured for all operations and have active compliance programs to adhere to all state and federal laws regulations.

In general, fuel only, discount, or COD (cash on delivery) companies have limited operations. This means that these companies have lower overhead costs than full-service dealers because they may operate out of a home, may employ only one or two people, may have only one truck for fuel delivery, and may contract with independent technicians for equipment installation and repair.

### **Q21. What's a typical profit margin for a heating oil company?**

Due to strict anti-trust laws regarding commodity pricing and competition among Oilheat dealers within the marketplace, we are advised not to discuss or speculate on specific profit margins for heating oil retailers. Also, every retail operation has different overhead and fixed costs, and business requirements that lead to different profit margins.

### **Q22. Could the current crude oil and heating oil market conditions force some heating oil companies out of business?**

Because the cost of the commodity – heating oil – has more than doubled in price over the past 18 months, some heating oil companies have had a difficult time financing their operations. Credit lines with banks may have been stretched to the limit for these firms, requiring many to renegotiate banking arrangements. Wholesale suppliers of heating oil also require that retailers pay their bills promptly through electronic fund transfer. Also, since energy costs are higher, some customers have been slow in paying their bills to heating oil companies, further affecting cash flow.

This is another challenge; however, we are confident that the strong independent businesses in the industry are working with their lenders and creditors to meet the needs of their business and the consumer. The industry is confident that consumers will be able to buy Oilheat during the coming winter. Wars, natural disasters, depressions have not prevented the delivery of this critical product; a short term increase in prices will not affect the ability of the industry to perform during the winter.

### **Q23. How do you compare a heating oil gallon to natural gas?**

Natural gas is sold using a different unit of measurement than heating oil. Natural gas is sold by the therm while heating oil is sold by the gallon. Also, a therm of gas has 38,000 less Btu (British thermal unit) – or energy power – than a gallon of heating oil. Heating oil contains 138,000 Btu per gallon, while natural gas has 100,000 Btu per therm.

Therefore, in order to determine a “gallon-to-gallon” equivalent for natural gas versus heating oil, you must first determine the cost per therm for a particular gas utility and then multiply that number by 1.38 to account for the difference in Btu's.

### **Q24. What is degree day monitoring?**

Fuel use can be effectively monitored by using degree-day measurements. The degree day system was created by heating engineers who needed a method to relate each day's temperatures to the demand for fuel to heat and cool buildings.

To calculate the heating degree days for a particular day, retail heating oil dealers find the day's average temperature by adding the day's high and low temperatures and then dividing by two. If the number is above 65, there is no heating degree days that day. If the number is less than 65, dealers subtract it from 65 to find the number of heating degree days.

For example, if the day's high temperature is 60 and the low is 40, the average temperature is 50 degrees. 65 minus 50 equals 15 heating degree days.

Cooling degree days are also based on the day's average minus 65. They relate the day's temperature to the energy demands of air conditioning. For example, if the day's high is 90 and the day's low is 70, the day's average is 80. Eighty minus 65 equals 15 cooling degree days.

## **Q25. How many degree days are there in a normal winter?**

As an example, a normal winter pattern in the northeast is 5500 degree days according to the 30-year norm. Understandably, degree days can and will vary from region-to-region, state-to-state, and town-to-town depending on climate and weather conditions on any given day. The US Weather Bureau maintains a number of weather stations to record temperatures for computing degree days and has compiled extensive historical data.

## **Q26. Which fuel is better, natural gas or heating oil?**

Historically, heating oil has maintained a consistent price advantage over natural gas and that trend may continue. The Oilheat industry has made tremendous strides in improving the efficiency and cleanliness of home heating oil boilers, furnaces and water heaters — equipment that is comparable to natural gas systems.

Regarding conversion from Oilheat to natural gas: The Consumer Energy Council of America (CECA) has consistently found that it makes more sense to conserve fuel than to convert. It is important to note that the heating oil industry is recognized for providing outstanding 24-hour customer service; a statement the gas utilities cannot often make because they are large monopolies with no in-house technical and repair staff that can respond immediately.

## **Q27. Where can homeowners go for help in paying their heating oil bills?**

Needy families and the elderly can apply for fuel assistance through agencies in their respective states that receive funds from the Federal LIHEAP program (Low Income Home Energy Assistance Program). In addition, many charitable and social welfare organizations such as the Salvation Army and local “helping hand” and “good neighbor” funds provide fuel assistance. Consumers needing assistance should apply with the appropriate organization in their community and state. Contact information is available on many state agency websites or through local city halls.

## **Q28. Where does our heating oil come from?**

Heating oil for the northeast comes from various refineries in the U.S., Mexico, Venezuela, the Caribbean, the OPEC countries in the mid-east and Russia. It is shipped to key ports via pipeline, barges and tankers. The heating oil consumed in other parts of the U.S. comes primarily from product refined in the United States.

## **Q29. How many gallons of heating oil will a homeowner use during the heating season?**

A typical home uses 800 gallons of heating oil for heat and hot water production during a year for heating and hot water. This usage is down significantly from about 1200 gallons a year consumed in the 1970's and 80's because of the installation of more efficient home heating oil systems and conservation efforts by the Oilheat industry and consumers.

These key facts and figures have been prepared by the National Oilheat Research Alliance (NORA), Alexandria, VA. NORA is a nationwide collaborative of Oilheat retailers in 21 states and the District of Columbia. NORA's activities are focused on consumer education and information, technical training within the industry, and research and development of new Oilheat technology. The website for NORA is [www.nora-oilheat.org](http://www.nora-oilheat.org).

## STATE OF ALASKA

Retail Oilheat Businesses	Sales (000's)	Annual Payroll (000's)	Employees
76	\$137,617	\$18,250	554

Data Source: US Census Bureau, 2002 County Business Patterns and industry data estimates.  
Sales Data = Oilheat volume x avg. price for no. 2 distillate heating oil in state for 2003 (exclusive of any taxes) as reported by Energy Information Administration, plus a 6% allowance for HVAC sales.

### Over 79,000 households in the state use Oilheat



**Estimated number of consumers in state using Oilheat** = 206,518  
79,429 x 2.6 (avg. no. of consumers per household)

**Total Oilheat Volume** = 104.7 Million Gallons  
Oilheat Volume = Residential and Commercial Sales of Distillate Fuel Oil and Kerosene for 2003

**Percent of households in state using Oilheat** = 36%

Data Source: U.S. Dept. of Energy, 2003 Heating Oil and Kerosene Sales and 2000 Census of Housing

## STATE OF CONNECTICUT

Retail Oilheat Businesses	Sales (000's)	Annual Payroll (000's)	Employees
766	\$1,394,559	\$178,678	4,103

Data Source: US Census Bureau, 2002 County Business Patterns and industry data estimates.  
Sales Data = Oilheat volume x avg. price for no. 2 distillate heating oil in state for 2003 (exclusive of any taxes) as reported by Energy Information Administration, plus a 6% allowance for HVAC sales.

**Over 682,000 households in the state use Oilheat**



**Estimated number of consumers in state using Oilheat** = 1,774,328  
682,434 x 2.6 (avg. no. of consumers per household)

**Total Oilheat Volume** = 854.3 Million Gallons  
Oilheat Volume = Residential and Commercial Sales of Distillate Fuel Oil and Kerosene for 2003

**Percent of households in state using Oilheat** = 52.4%

Data Source: U.S. Dept. of Energy, 2003 Heating Oil and Kerosene Sales and 2000 Census of Housing

**To access more information and news about Oilheat in Connecticut:**

Independent Connecticut Petroleum Assn. (ICPA)

Phone: 860-613-2041

Fax: 860-632-1122

[www.icpa.org](http://www.icpa.org)

## STATE OF DELAWARE

Retail Oilheat Businesses	Sales (000's)	Annual Payroll (000's)	Employees
51	\$100,716	\$10,786	249

Data Source: US Census Bureau, 2002 County Business Patterns and industry data estimates.  
Sales Data = Oilheat volume x avg. price for no. 2 distillate heating oil in state for 2003 (exclusive of any taxes) as reported by Energy Information Administration, plus a 6% allowance for HVAC sales.

**Over 77,000 households in the state use Oilheat**



**Estimated number of consumers in state using Oilheat** = 201,419  
77,469 x 2.6 (avg. no. of consumers per household)

**Total Oilheat Volume** = 64.2 Million Gallons  
Oilheat Volume = Residential and Commercial Sales of Distillate Fuel Oil and Kerosene for 2003

**Percent of households in state using Oilheat** = 26%

Data Source: U.S. Dept. of Energy, 2003 Heating Oil and Kerosene Sales and 2000 Census of Housing

**To access more information and news about Oilheat in Delaware:**

Mid-Atlantic Petroleum Distributors Assn. (MAPDA)

Phone: 410-349-0808

Fax: 410-349-8510

[www.mapda.org](http://www.mapda.org)

## DISTRICT OF COLUMBIA

Retail Oilheat Businesses	Sales (000's)	Annual Payroll (000's)	Employees
10	\$60,138	\$2,050	42

Data Source: US Census Bureau, 2002 County Business Patterns and industry data estimates.  
Sales Data = Oilheat volume x avg. price for no. 2 distillate heating oil in state for 2003 (exclusive of any taxes) as reported by Energy Information Administration, plus a 6% allowance for HVAC sales.

**Over 17,000 households in the district use Oilheat**



**Estimated number of consumers in district using Oilheat = 44,322**  
17,047 x 2.6 (avg. no. of consumers per household)

**Total Oilheat Volume = 32.7 Million Gallons**  
Oilheat Volume = Residential and Commercial Sales of Distillate Fuel Oil and Kerosene for 2003

Data Source: U.S. Dept. of Energy, 2003 Heating Oil and Kerosene Sales and 2000 Census of Housing

**To access more information and news about Oilheat in D.C.:**

Mid-Atlantic Petroleum Distributors Assn. (MAPDA)

Phone: 410-349-0808

Fax: 410-349-8510

[www.mapda.org](http://www.mapda.org)

## STATE OF IDAHO

Retail Oilheat Businesses	Sales (000's)	Annual Payroll (000's)	Employees
98	\$34,270	\$7,211	250

Data Source: US Census Bureau, 2002 County Business Patterns and industry data estimates.  
Sales Data = Oilheat volume x avg. price for no. 2 distillate heating oil in state for 2003 (exclusive of any taxes) as reported by Energy Information Administration, plus a 6% allowance for HVAC sales.

**Over 25,000 households in the state use Oilheat**



**Estimated number of consumers in state using Oilheat** = 65,504  
25,194 x 2.6 (avg. no. of consumers per household)

**Total Oilheat Volume** = 27.4 Million Gallons  
Oilheat Volume = Residential and Commercial Sales of Distillate Fuel Oil and Kerosene for 2003

Data Source: U.S. Dept. of Energy, 2003 Heating Oil and Kerosene Sales and 2000 Census of Housing

**To access more information and news about Oilheat in Idaho:**

Idaho Petroleum Marketers & C-Store Assn.

Phone: 208-345-6632

Fax: 208-345-6634

## STATE OF INDIANA

Retail Oilheat Businesses	Sales (000's)	Annual Payroll (000's)	Employees
151	\$18,270	4,190	406

Data Source: US Census Bureau, 2002 County Business Patterns and industry data estimates.  
Sales Data = Oilheat volume x avg. price for no. 2 distillate heating oil in state for 2003 (exclusive of any taxes) as reported by Energy Information Administration, plus a 6% allowance for HVAC sales.

Over **60,000** households in the state use Oilheat



**Estimated number of consumers  
in state using Oilheat** = **156,686**  
60,264 x 2.6 (avg. no. of consumers per household)

**Total Oilheat Volume** = **135.9** Million Gallons  
Oilheat Volume = Residential and Commercial Sales of Distillate Fuel Oil and Kerosene for 2003

Data Source: U.S. Dept. of Energy, 2003 Heating Oil and Kerosene Sales and 2000 Census of Housing

**To access more information and news about Oilheat in Indiana:**

Indiana Petroleum Marketers and Convenience Store Association (IPCA)

Phone: 317-633-4662

Fax: 317-630-1827

[www.ipca.org](http://www.ipca.org)

## COMMONWEALTH OF KENTUCKY

Retail Oilheat Businesses	Sales (000's)	Annual Payroll (000's)	Employees
231	\$87,503	\$6,857	249

Data Source: US Census Bureau, 2002 County Business Patterns and industry data estimates.  
Sales Data = Oilheat volume x avg. price for no. 2 distillate heating oil in state for 2003 (exclusive of any taxes) as reported by Energy Information Administration, plus a 6% allowance for HVAC sales.

**Over 44,000 households in the state use Oilheat**



**Estimated number of consumers in state using Oilheat** = 114,928  
44,203 x 2.6 (avg. no. of consumers per household)

**Total Oilheat Volume** = 65 Million Gallons  
Oilheat Volume = Residential and Commercial Sales of Distillate Fuel Oil and Kerosene for 2003

Data Source: U.S. Dept. of Energy, 2003 Heating Oil and Kerosene Sales and 2000 Census of Housing

**To access more information and news about Oilheat in Kentucky:**

Kentucky Petroleum Marketers Assn. (KPMA)

Phone: 502-875-3738

Fax: 502-875-4515

[www.kpma.net](http://www.kpma.net)

## STATE OF MAINE

Retail Oilheat Businesses	Sales (000's)	Annual Payroll (000's)	Employees
289	\$950,337	\$66,177	8,000

Data Source: US Census Bureau, 2002 County Business Patterns and industry data estimates.  
Sales Data = Oilheat volume x avg. price for no. 2 distillate heating oil in state for 2003 (exclusive of any taxes) as reported by Energy Information Administration, plus a 6% allowance for HVAC sales.

Over **415,000** households in the state use Oilheat



**Estimated number of consumers in state using Oilheat** = **1,080,090**  
415,420 x 2.6 (avg. no. of consumers per household)

**Total Oilheat Volume** = **622.6 Million Gallons**  
Oilheat Volume = Residential and Commercial Sales of Distillate Fuel Oil and Kerosene for 2003

**Percent of households in state using Oilheat** = **80%**

Data Source: U.S. Dept. of Energy, 2003 Heating Oil and Kerosene Sales and 2000 Census of Housing

**To access more information and news about Oilheat in Maine:**

Maine Oil Dealers Association (MODA)

Phone: 207-729-5298

Fax: 207-721-9227

[www.meoil.com](http://www.meoil.com)

## STATE OF MARYLAND

Retail Oilheat Businesses	Sales (000's)	Annual Payroll (000's)	Employees
366	\$521,243	\$64,396	1,903

Data Source: US Census Bureau, 2002 County Business Patterns and industry data estimates.  
Sales Data = Oilheat volume x avg. price for no. 2 distillate heating oil in state for 2003 (exclusive of any taxes) as reported by Energy Information Administration, plus a 6% allowance for HVAC sales.

Over **316,000** households in the state use Oilheat



**Estimated number of consumers in state using Oilheat** = **823,508**  
316,734 x 2.6 (avg. no. of consumers per household)

**Total Oilheat Volume** = **308.3** Million Gallons  
Oilheat Volume = Residential and Commercial Sales of Distillate Fuel Oil and Kerosene for 2003

**Percent of households in state using Oilheat** = **16%**

Data Source: U.S. Dept. of Energy, 2003 Heating Oil and Kerosene Sales and 2000 Census of Housing

**To access more information and news about Oilheat in Maryland:**

Mid-Atlantic Petroleum Distributors Assn. (MAPDA)

Phone: 410-349-0808

Fax: 410-349-8510

[www.mapda.org](http://www.mapda.org)

## COMMONWEALTH OF MASSACHUSETTS

Retail Oilheat Businesses	Sales (000's)	Annual Payroll (000's)	Employees
907	\$1,839,369	\$205,074	5,120

Data Source: US Census Bureau, 2002 County Business Patterns and industry data estimates.  
Sales Data = Oilheat volume x avg. price for no. 2 distillate heating oil in state for 2003 (exclusive of any taxes) as reported by Energy Information Administration, plus a 6% allowance for HVAC sales.

### Over 963,000 households in the state use Oilheat



**Estimated number of consumers in state using Oilheat** = 2,504,718  
963,353 x 2.6 (avg. no. of consumers per household)

**Total Oilheat Volume** = 1,164.6  
Million Gallons

Oilheat Volume = Residential and Commercial Sales of Distillate Fuel Oil and Kerosene for 2003

**Percent of households in state using Oilheat** = 39%

Data Source: U.S. Dept. of Energy, 2003 Heating Oil and Kerosene Sales and 2000 Census of Housing

### To access more information and news about Oilheat in Massachusetts:

Massachusetts Oilheat Council (MOC)

Phone: 781-237-0730

Fax: 781-237-2442

[www.massoilheat.org](http://www.massoilheat.org)

## STATE OF MICHIGAN

Retail Oilheat Businesses	Sales (000's)	Annual Payroll (000's)	Employees
359	\$233,539	9,350	718

Data Source: US Census Bureau, 2002 County Business Patterns and industry data estimates.  
Sales Data = Oilheat volume x avg. price for no. 2 distillate heating oil in state for 2003 (exclusive of any taxes) as reported by Energy Information Administration, plus a 6% allowance for HVAC sales.

**Over 130,000 households in the state use Oilheat**



**Estimated number of consumers  
in state using Oilheat = 340,426**  
130,933 x 2.6 (avg. no. of consumers per household)

**Total Oilheat Volume = 162 Million Gallons**  
Oilheat Volume = Residential and Commercial Sales of Distillate Fuel Oil and Kerosene for 2003

Data Source: U.S. Dept. of Energy, 2003 Heating Oil and Kerosene Sales and 2000 Census of Housing

**To access more information and news about Oilheat in Michigan:**

Michigan Petroleum Assn./Michigan Assn. of C-Stores (MPA/MACS)

Phone: 517-622-3530

Fax: 517-622-3420

[www.mpamacs.org](http://www.mpamacs.org)

## STATE OF NEVADA

Retail Oilheat Businesses	Sales (000's)	Annual Payroll (000's)	Employees
74	Not Surveyed	1,557	135

Data Source: US Census Bureau, 2002 County Business Patterns and industry data estimates.  
Sales Data = Oilheat volume x avg. price for no. 2 distillate heating oil in state for 2003 (exclusive of any taxes) as reported by Energy Information Administration, plus a 6% allowance for HVAC sales.

**Over 11,000 households in the state use Oilheat**



**Estimated number of consumers  
in state using Oilheat = 29,601**  
11,385 x 2.6 (avg. no. of consumers per household)

**Total Oilheat Volume = 20 Million Gallons**  
Oilheat Volume = Residential and Commercial Sales of Distillate Fuel Oil and Kerosene for 2003

Data Source: U.S. Dept. of Energy, 2003 Heating Oil and Kerosene Sales and 2000 Census of Housing

**To access more information and news about Oilheat in Nevada:**

Nevada Petroleum Marketers & C-Store Assn.

Phone: 775-348-1888

Fax: 775-348-2011

[www.nvfuels.com](http://www.nvfuels.com)



## STATE OF NEW HAMPSHIRE

Retail Oilheat Businesses	Sales (000's)	Annual Payroll (000's)	Employees
300	\$501,632	\$61,408	1,710

Data Source: US Census Bureau, 2002 County Business Patterns and industry data estimates.  
Sales Data = Oilheat volume x avg. price for no. 2 distillate heating oil in state for 2003 (exclusive of any taxes) as reported by Energy Information Administration, plus a 6% allowance for HVAC sales.

Over **275,000** households in the state use Oilheat



**Estimated number of consumers in state using Oilheat** = **717,150**  
 $275,827 \times 2.6$  (avg. no. of consumers per household)

**Total Oilheat Volume** = **327.5 Million Gallons**  
 Oilheat Volume = Residential and Commercial Sales of Distillate Fuel Oil and Kerosene for 2003

**Percent of households in state using Oilheat** = **58%**

Data Source: U.S. Dept. of Energy, 2003 Heating Oil and Kerosene Sales and 2000 Census of Housing

**To access more information and news about Oilheat in New Hampshire:**

Oil Heat Council of New Hampshire (OHC-NH)

Phone: 603-895-3808

Fax: 603-895-3325

[www.nhoilheat.com](http://www.nhoilheat.com)

## STATE OF NEW JERSEY

Retail Oilheat Businesses	Sales (000's)	Annual Payroll (000's)	Employees
520	\$1,037,952	\$140,287	3,670

Data Source: US Census Bureau, 2002 County Business Patterns and industry data estimates.  
Sales Data = Oilheat volume x avg. price for no. 2 distillate heating oil in state for 2003 (exclusive of any taxes) as reported by Energy Information Administration, plus a 6% allowance for HVAC sales.

Over **595,000** households in the state use Oilheat



**Estimated number of consumers  
in state using Oilheat** = **1,547,244**  
595,094 x 2.6 (avg. no. of consumers per household)

**Total Oilheat Volume** = **612 Million Gallons**  
Oilheat Volume = Residential and Commercial Sales of Distillate Fuel Oil and Kerosene for 2003

Data Source: U.S. Dept. of Energy, 2003 Heating Oil and Kerosene Sales and 2000 Census of Housing

**To access more information and news about Oilheat in New Jersey:**

Fuel Merchants Assn. of New Jersey (FMA-NJ)

Phone: 973-467-1400

Fax: 973-467-4066

[www.fmanj.org](http://www.fmanj.org)

## STATE OF NEW YORK

Retail Oilheat Businesses	Sales (000's)	Annual Payroll (000's)	Employees
1,272	\$4,284,638	\$367,278	9,466

Data Source: US Census Bureau, 2002 County Business Patterns and industry data estimates.  
Sales Data = Oilheat volume x avg. price for no. 2 distillate heating oil in state for 2003 (exclusive of any taxes) as reported by Energy Information Administration, plus a 6% allowance for HVAC sales.

**Over 2,336,000 households in the state use Oilheat**



**Estimated number of consumers in state using Oilheat** = 6,075,456  
2,336,714 x 2.6 (avg. no. of consumers per household)

**Total Oilheat Volume** = 2,463.2  
Million Gallons

Oilheat Volume = Residential and Commercial Sales of Distillate Fuel Oil and Kerosene for 2003

**Percent of households in state using Oilheat** = 33%

Data Source: U.S. Dept. of Energy, 2003 Heating Oil and Kerosene Sales and 2000 Census of Housing

### To access more information and news about Oilheat in New York:

#### Statewide

Empire State Petroleum Association (ESPA)

Phone: 518-449-0702

Fax: 518-449-0779

[www.espa.net](http://www.espa.net)

#### NYC Region

New York Oil Heating Assn. (NYOHA)

Phone: 212-695-1380

Fax: 212-594-6583

[www.nyoha.org](http://www.nyoha.org)

#### Long Island

Oil Heat Institute of Long Island (OHI-LI)

Phone: 631-360-0200

Fax: 631-360-0781

[www.ohili.org](http://www.ohili.org)



## STATE OF NORTH CAROLINA

Retail Oilheat Businesses	Sales (000's)	Annual Payroll (000's)	Employees
535	\$446,529	20,831	1,100

Data Source: US Census Bureau, 2002 County Business Patterns and industry data estimates.  
Sales Data = Oilheat volume x avg. price for no. 2 distillate heating oil in state for 2003 (exclusive of any taxes) as reported by Energy Information Administration, plus a 6% allowance for HVAC sales.

Over **368,000** households in the state use Oilheat



**Estimated number of consumers in state using Oilheat** = **958,695**  
 $368,729 \times 2.6$  (avg. no. of consumers per household)

**Total Oilheat Volume** = **313.2 Million Gallons**  
 Oilheat Volume = Residential and Commercial Sales of Distillate Fuel Oil and Kerosene for 2003

Data Source: U.S. Dept. of Energy, 2003 Heating Oil and Kerosene Sales and 2000 Census of Housing

**To access more information and news about Oilheat in North Carolina:**

North Carolina Petroleum Marketers Assn. (NCPMA)

Phone: 919-782-4411

Fax: 919-782-4414

[www.ncpma.org](http://www.ncpma.org)

## STATE OF OHIO

<b>Retail Oilheat Businesses</b>	<b>Sales (000's)</b>	<b>Annual Payroll (000's)</b>	<b>Employees</b>
<b>882</b>	<b>\$342,845</b>	<b>\$95,970</b>	<b>3,528</b>

Data Source: US Census Bureau, 2002 County Business Patterns and industry data estimates.  
Sales Data = Oilheat volume x avg. price for no. 2 distillate heating oil in state for 2003 (exclusive of any taxes) as reported by Energy Information Administration, plus a 6% allowance for HVAC sales.

**Over 209,000 households in the state use Oilheat**



**Estimated number of consumers in state using Oilheat** = **543,641**  
209,093 x 2.6 (avg. no. of consumers per household)

**Total Oilheat Volume** = **246.9 Million Gallons**  
Oilheat Volume = Residential and Commercial Sales of Distillate Fuel Oil and Kerosene for 2003

Data Source: U.S. Dept. of Energy, 2003 Heating Oil and Kerosene Sales and 2000 Census of Housing

**To access more information and news about Oilheat in Ohio:**

Ohio Petroleum Marketers & C-Store Assn. (OPMCA)

Phone: 614-792-5212

Fax: 614-792-1706

[www.opmca.org](http://www.opmca.org)

## STATE OF OREGON

Retail Oilheat Businesses	Sales (000's)	Annual Payroll (000's)	Employees
151	\$90,810	\$11,402	440

Data Source: US Census Bureau, 2002 County Business Patterns and industry data estimates.  
Sales Data = Oilheat volume x avg. price for no. 2 distillate heating oil in state for 2003 (exclusive of any taxes) as reported by Energy Information Administration, plus a 6% allowance for HVAC sales.

Over **91,000** households in the state use Oilheat



**Estimated number of consumers in state using Oilheat** = **238,789**  
91,842 x 2.6 (avg. no. of consumers per household)

**Total Oilheat Volume** = **65.9 Million Gallons**  
Oilheat Volume = Residential and Commercial Sales of Distillate Fuel Oil and Kerosene for 2003

Data Source: U.S. Dept. of Energy, 2003 Heating Oil and Kerosene Sales and 2000 Census of Housing

**To access more information and news about Oilheat in Oregon:**

Oregon Petroleum Assn. (OPA)

Phone: 503-670-1777

Fax: 503-670-8337

[www.oregonpetroleum.org](http://www.oregonpetroleum.org)

## STATE OF PENNSYLVANIA

Retail Oilheat Businesses	Sales (000's)	Annual Payroll (000's)	Employees
1,347	\$2,063,342	\$221,467	6,834

Data Source: US Census Bureau, 2002 County Business Patterns and industry data estimates.  
Sales Data = Oilheat volume x avg. price for no. 2 distillate heating oil in state for 2003 (exclusive of any taxes) as reported by Energy Information Administration, plus a 6% allowance for HVAC sales.

**Over 1,217,000 households in the state use Oilheat**



**Estimated number of consumers in state using Oilheat** = 3,164,603  
1,217,155 x 2.6 (avg. no. of consumers per household)

**Total Oilheat Volume** = 1,285.7  
Million Gallons

Oilheat Volume = Residential and Commercial Sales of Distillate Fuel Oil and Kerosene for 2003

**Percent of households in state using Oilheat** = 25%

Data Source: U.S. Dept. of Energy, 2003 Heating Oil and Kerosene Sales and 2000 Census of Housing

**To access more information and news about Oilheat in Pennsylvania:**

Pennsylvania Petroleum Marketers & C-Store Assn. (PPMCSA)

Phone: 717-902-0210

Fax: 717-902-0290

[www.ppmcsa.org](http://www.ppmcsa.org)

## STATE OF RHODE ISLAND

<b>Retail Oilheat Businesses</b>	<b>Sales (000's)</b>	<b>Annual Payroll (000's)</b>	<b>Employees</b>
<b>142</b>	<b>\$337,327</b>	<b>\$39,585</b>	<b>1,163</b>

Data Source: US Census Bureau, 2002 County Business Patterns and industry data estimates.  
Sales Data = Oilheat volume x avg. price for no. 2 distillate heating oil in state for 2003 (exclusive of any taxes) as reported by Energy Information Administration, plus a 6% allowance for HVAC sales.

### Over 171,000 households in the state use Oilheat



**Estimated number of consumers in state using Oilheat** = **446,826**  
 $171,856 \times 2.6$  (avg. no. of consumers per household)

**Total Oilheat Volume** = **211.1 Million Gallons**  
 Oilheat Volume = Residential and Commercial Sales of Distillate Fuel Oil and Kerosene for 2003

**Percent of households in state using Oilheat** = **42%**

Data Source: U.S. Dept. of Energy, 2003 Heating Oil and Kerosene Sales and 2000 Census of Housing

### To access more information and news about Oilheat in Rhode Island:

Oil Heat Institute of Rhode Island (OHI-RI)

Phone: 401-464-8000

Fax: 401-464-9506

## STATE OF VERMONT

Retail Oilheat Businesses	Sales (000's)	Annual Payroll (000's)	Employees
119	\$252,787	\$39,384	1,265

Data Source: US Census Bureau, 2002 County Business Patterns and industry data estimates.  
Sales Data = Oilheat volume x avg. price for no. 2 distillate heating oil in state for 2003 (exclusive of any taxes) as reported by Energy Information Administration, plus a 6% allowance for HVAC sales.

**Over 141,000 households in the state use Oilheat**



**Estimated number of consumers in state using Oilheat** = **366,707**  
141,041 x 2.6 (avg. no. of consumers per household)

**Total Oilheat Volume** = **157.1 Million Gallons**  
Oilheat Volume = Residential and Commercial Sales of Distillate Fuel Oil and Kerosene for 2003

**Percent of households in state using Oilheat** = **59%**

Data Source: U.S. Dept. of Energy, 2003 Heating Oil and Kerosene Sales and 2000 Census of Housing

**To access more information and news about Oilheat in Vermont:**

Vermont Fuel Dealers Assn. (VFDA)

Phone: 802-485-7999

Fax: 802-485-9637

[www.vermontfuel.com](http://www.vermontfuel.com)

## STATE OF VIRGINIA

Retail Oilheat Businesses	Sales (000's)	Annual Payroll (000's)	Employees
396	\$647,828	\$56,914	2,007

Data Source: US Census Bureau, 2002 County Business Patterns and industry data estimates.  
Sales Data = Oilheat volume x avg. price for no. 2 distillate heating oil in state for 2003 (exclusive of any taxes) as reported by Energy Information Administration, plus a 6% allowance for HVAC sales.

Over **362,000** households in the state use Oilheat



**Estimated number of consumers  
in state using Oilheat** = **942,971**  
362,681 x 2.6 (avg. no. of consumers per household)

**Total Oilheat Volume** = **431 Million Gallons**  
Oilheat Volume = Residential and Commercial Sales of Distillate Fuel Oil and Kerosene for 2003

Data Source: U.S. Dept. of Energy, 2003 Heating Oil and Kerosene Sales and 2000 Census of Housing

**To access more information and news about Oilheat in Virginia:**

Virginia Petroleum, Convenience and Grocery Assn. (VPCGA)

Phone: 804-282-7534

Fax: 804-282-7777

[www.vpcga.com](http://www.vpcga.com)

## STATE OF WASHINGTON

Retail Oilheat Businesses	Sales (000's)	Annual Payroll (000's)	Employees
262	\$1,885,678	\$24,733	666

Data Source: US Census Bureau, 2002 County Business Patterns and industry data estimates.  
Sales Data = Oilheat volume x avg. price for no. 2 distillate heating oil in state for 2003 (exclusive of any taxes) as reported by Energy Information Administration, plus a 6% allowance for HVAC sales.

**Over 126,000 households in the state use Oilheat**



**Estimated number of consumers in state using Oilheat** = **329,542**  
126,740 x 2.6 (avg. no. of consumers per household)

**Total Oilheat Volume** = **117.8 Million Gallons**  
Oilheat Volume = Residential and Commercial Sales of Distillate Fuel Oil and Kerosene for 2003

Data Source: U.S. Dept. of Energy, 2003 Heating Oil and Kerosene Sales and 2000 Census of Housing

**To access more information and news about Oilheat in Washington:**

Pacific Northwest Oil Heat Council (PNOC)

Phone: 206-463-2314

Fax: 206-463-2313

[www.pnwoilheat.com](http://www.pnwoilheat.com)

## STATE OF WISCONSIN

Retail Oilheat Businesses	Sales (000's)	Annual Payroll (000's)	Employees
524	\$278,275	\$21,215	788

Data Source: US Census Bureau, 2002 County Business Patterns and industry data estimates.  
Sales Data = Oilheat volume x avg. price for no. 2 distillate heating oil in state for 2003 (exclusive of any taxes) as reported by Energy Information Administration, plus a 6% allowance for HVAC sales.

Over **158,000** households in the state use Oilheat



**Estimated number of consumers  
in state using Oilheat** = **412,097**  
158,499 x 2.6 (avg. no. of consumers per household)

**Total Oilheat Volume** = **196.5 Million Gallons**  
Oilheat Volume = Residential and Commercial Sales of Distillate Fuel Oil and Kerosene for 2003

Data Source: U.S. Dept. of Energy, 2003 Heating Oil and Kerosene Sales and 2000 Census of Housing

**To access more information and news about Oilheat in Wisconsin:**

Wisconsin Petroleum Marketers & C-Store Assn. (WPMCA)

Phone: 608-256-7555

Fax: 608-256-7666

[www.wpmca.org](http://www.wpmca.org)