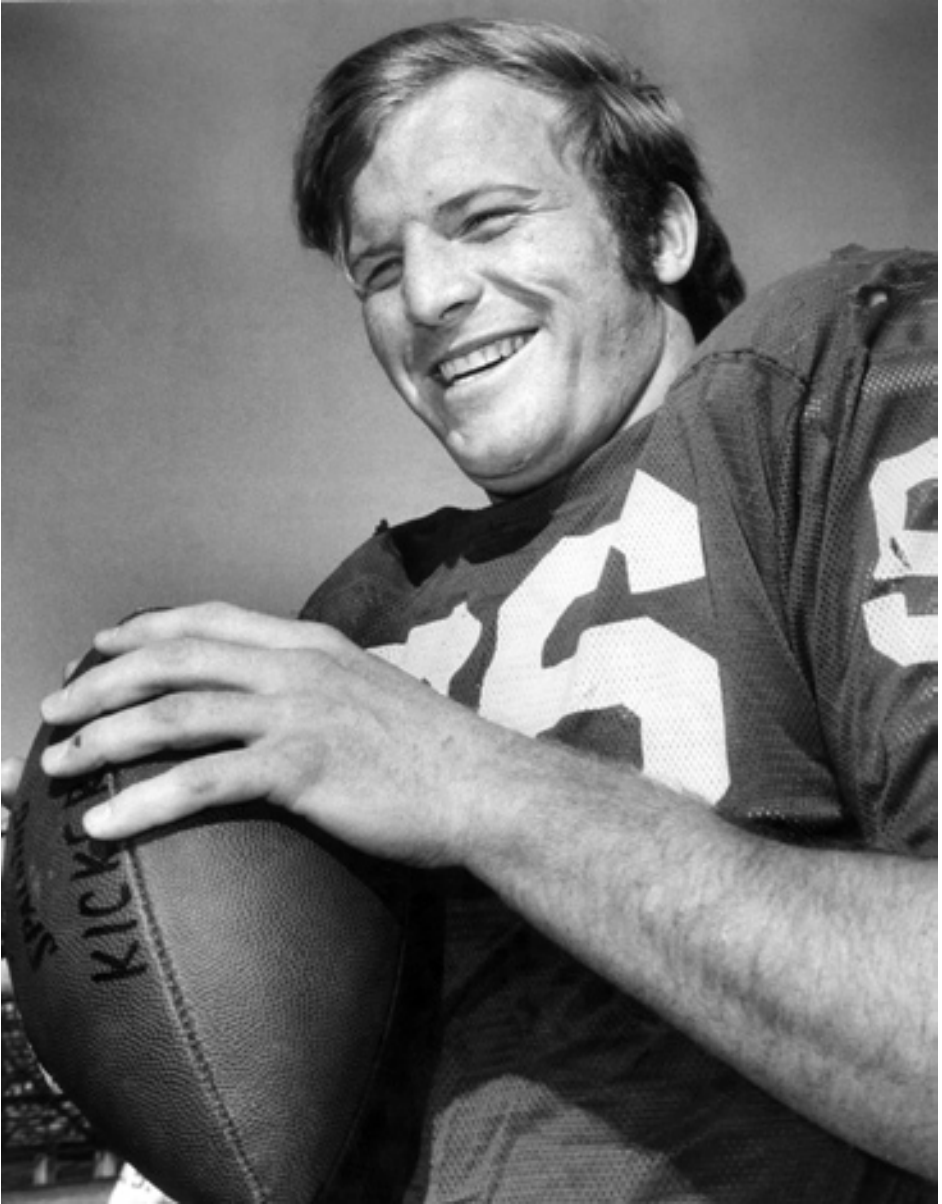


# Commerce and Agriculture

- General Information
- Farms and Ranches
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All-American quarterback **Jack Mildren**, considered by many to be the first great wishbone quarterback, led the nation in rushing, total offense, and scoring in 1971. His running and passing took the University of Oklahoma to a near upset of No. 1 Nebraska in what became known as the “Game of the Century.” Following graduation from college—and for three seasons—he played defensive back for professional football’s Baltimore Colts and New England Patriots. In 1990 Jack Mildren was elected the twenty-second lieutenant governor of Oklahoma. Mildren ran for governor in 1992, but finished second to Republican Frank Keating.

# Commerce in Oklahoma

According to the Oklahoma State University *2005 Economic Outlook*, the economic recovery is fully underway in Oklahoma as job formation finally arrived during the third quarter of 2003. Job losses in the recent slowdown totaled approximately 75,000, or 5.1 percent of total non-farm wage and salary payroll employment statewide, more than double the 2.1 percent job loss at the national level. The greatest proportionate losses occurred in the Tulsa metropolitan area as the region lost 32,000 jobs, or 7.8 percent of the area workforce. The Oklahoma City metropolitan area enjoyed the best relative performance but nevertheless shed 22,500 jobs, or 4.1 percent of area payrolls.

At the national level, manufacturing employment contracted more than 14.0 percent during the slowdown, accounting for nine out of ten jobs lost. The state's manufacturing sector suffered a similar fate, shedding nearly 40,000 jobs for a 22 percent decline since early 2001. The remaining job losses across the state have been broad based with most major industry sectors except the natural resources and mining sector, the health services sector, and the interest-rate-sensitive finance and insurance sector posting job losses during the slowdown.

The bottom in employment for both Oklahoma and the nation coincided closely. Through approximately one year of recovery, job formation in Oklahoma has exceeded the rebound at the national level. Beginning in the third quarter of 2003, state non-farm wage and salary payrolls expanded 1.7 percent versus 1.3 percent for the nation. Total wage and salary employment for the state, however, remains more than 50,000 jobs below the 2001 peak in hiring. The Oklahoma City metro area has recovered approximately 40 percent of lost jobs, while Tulsa has managed to replace only one of six jobs lost in the downturn.

The three major federal employment surveys of the state's workforce provide differing estimates of the timing and magnitude of the current job cycle. The household survey, which is based on a small sample of households but covers farm employees and the self-employed, shows only modest job losses during the slowdown. This possibly reflects the temporary conversion of wage and salary workers to the ranks of the self-employed. The survey, however, shows hiring weakness as far back as 1999 and does not suggest any job recovery until the first quarter of 2004.

Both the establishment survey and the Quarterly Census of Employment and Wages (QCEW) track only non-farm wage and salary workers and show a peak in hiring in mid-year 2001, followed by continuous job losses through most of 2003. These two surveys are based on considerably larger samples than the household survey but do not track self-employed or agricultural workers and include multiple job holders. The closely watched establishment survey is based primarily on large businesses and suggests a total of 75,000 lost jobs, or 5.1 percent of total non-farm wage and salary jobs. The QCEW survey, which is based on the unemployment insurance tax records of nearly all employers and is considered to be the most reliable of the surveys, is mostly consistent with the establishment survey and places the bottom in hiring around June 2003, following a loss of 72,000 jobs or 4.9 percent. The QCEW further suggests that the job recovery was underway as early as the second quarter of 2003; however, current data are available only through December 2003 and cannot be compared to the other surveys in order to gauge the strength of recovery through the first three quarters of 2004.

## Tax Revenue vs. Employment Growth

Considerable uncertainty remains about the accuracy of the employment estimates for Oklahoma, especially when evaluated in conjunction with trends in tax revenue and the historical pattern of revisions in the employment data. In the early stages of the recession,

the major employment surveys indicated that the state was out performing the nation in job formation; at the same time personal income tax and sales tax receipts were plummeting statewide. The subsequent downward revisions in the job data were consistent with the timing and magnitude of changes in tax revenue and placed Oklahoma job growth near the bottom relative to the other states. Yet another divergence in the data has occurred in the recovery state of the cycle as tax revenue began to expand briskly in early 2003 and surpassed the 2001 peak by late 2003. Meanwhile, employment declined sharply for two more quarters and continues to remain well below the 2001 peak in hiring. Given the historical relationship between tax receipts and employment and the reliability of tax data, the divergence suggests that state job losses in the slowdown may be exaggerated. It further suggests that the recovery likely began earlier than suggested by the establishment survey and that the historical employment series may eventually be revised upward.

## Energy Effects

High energy costs are affecting economic growth at the national level, and total energy costs paid by transportation, industrial, commercial, and residential users in Oklahoma have increased by an estimated \$3.2 billion, or 38 percent, over costs from as recently as 1999. The impact of high energy costs is less severe in Oklahoma than in non-energy states, as the state remains a significant producer of oil and gas and enjoys a degree of offsetting economic stimulus during periods of high energy prices. Hiring of wage and salary workers in the state's energy sector has expanded by more than 10 percent, or 3,000 workers, the past two years, while total employment statewide contracted by 27,000 in the same period. Furthermore, the reported job numbers under state the true employment and earning impact of the energy sector since more than half of all oil and gas-related employment in the state comprises self-employed proprietors, who typically are not counted in the major employment surveys. These spillover effects from the state oil and gas sector provided a much needed counter-cyclical boost to the state economy during the slowdown.

## 2005 Forecast

The forecast through the remainder of 2004 predicted a net gain in total non-farm wage and salary employment of 0.6 percent and represented the first year-over-year increase in hiring across the state since 2001. Hiring strength already returned to most industry sectors in 2004, with the notable exception of the state's chronically weak manufacturing sector and the related sectors of wholesale trade, transportation, and warehousing. The Tulsa metro area was expected to exceed job growth at the state and national levels by posting a 1.2 percent gain for all 2004. After peaking at 6.0 percent in midyear 2003, the state's unemployment rate is currently below 4.5 percent and should stabilize near 4.0 percent by the end of 2005.

Growth in total Oklahoma non-farm employment is expected to accelerate to more "recovery-like" rate of 1.6 percent next year, nearly matching the expected 1.7 percent growth rate for the nation. Oklahoma City area payrolls are expected to exceed the rate of growth for both the state and nation and expand by 1.8 percent in 2005. The Tulsa area should end a three-year run of job losses and post a 1.0 percent gain in non-farm employment next year.

The negligible growth in real gross state product (GSP) and real personal income in the 2002-2003 period reflects the challenging economic conditions faced by the state in the slowdown. The return to job formation in 2004 is anticipated to be accompanied by gains in both GSP (2.3 percent) and real personal income (2.3 percent) for all of 2004, followed by another year of solid growth for both real GSP (2.1 percent) and real personal income (2.3 percent) in 2005. In addition, because the recession arrived in Oklahoma months after impacting the national economy, the latest income

data suggest that the state made up considerable ground in per capita personal income relative to the nation in the early stages of the slowdown. Oklahoma's per capita personal income has increased from approximately 81 percent of the national level, the ratio experienced throughout much of the 1990s, to an estimate 87 percent of the national level for both 2004 and 2005.

The recovery will be broad based during 2005, with job gains benefiting nearly every major industry sector. Employment in the natural resources and mining sector will continue to thrive along with high prices in the energy complex and is expected to expand by an additional 6.1 percent in 2005. Construction hiring should rebound from the cyclical losses suffered in the slowdown and expand 3.6 percent, despite some expected upward movement in long-term interest rates in 2005. Strong hiring gains are also anticipated for many of the major services sectors including professional, scientific, technical (3.5 percent), health (2.7 percent), and accommodations and food services (2.5 percent). Even the persistently weak manufacturing sector is expected to reverse four years of job losses and post a 1.0 percent gain in hiring in 2005, propelled mainly by a rebound in durable goods production.

State and local government hiring will expand only 0.5 percent in 2005 as budget gaps continue to constrain hiring. Retail trade hiring will likewise continue the weak rebound seen in the sector in 2004 (0.2 percent) and expand by an estimated 0.5 percent in 2005. Hiring in the real estate, rental, and leasing sector is expected to post a small decline of 0.2 percent in response to rising interest rates.

Other indicators such as robust growth in sales tax receipts at the state level suggests that Oklahoma consumer spending is already in recovery mode. Taxable retail sales were expected to grow 5.6 percent for all of 2004, moderating slightly to a more sustainable 4.4 percent growth rate in 2005.

The economic slowdown has also had only minimal impact on home values. Average home prices moderated from the rapid 5.7 percent growth rate posted in 2001 to 4.0 percent average gain for 2002 and 2003. Home prices were forecasted to increase 4.5 percent for all of 2004 before slowing to 3.2 percent growth in 2005, under the pressure of rising mortgage rates.

## Oklahoma's Revenue System

Oklahoma's revenue system has been stabilized upon broadly based taxes, levied at moderate rates. Not only have state revenues been stabilized, with consistent increases in collections representing sound state growth, but also the tax system has been stabilized in the sense of relieving the necessity of frequent legislative action. State revenues automatically increase with economic growth or the advance of inflationary conditions nationally; business and industry are free from the fear of being singled out for special taxes, imposed at punitive rates, which they alone would have to pay.

In 1941 Oklahoma adopted a constitutional amendment that requires state government to operate on a balanced budget. Warrants cannot be drawn against any appropriation unless revenues have accumulated for their payment. This fiscal plan assures stability of state finances and control of indebtedness.

In 1990 the corporate income tax was raised from 5 percent to 6 percent, primarily to provide increased funding for education. Unemployment compensation tax rates have been reduced four times. In 1959 a trust fund safeguard provision was enacted in the form of a rate escalator clause; but in 1981, again to keep employers' rates from going too high in any one year, the law was amended to provide that no employer's rate increase may exceed 2 percent per year. In 1997, new employer rates were 1.1 percent, the current statewide two year average. In 1999, new employer rates were 1 percent. Seventy-five percent of existing employers no longer have an unemployment tax liability. Additionally, state business and tax incentives are available to

both new and established and expanding Oklahoma companies.

Article 5, § 33 of the Oklahoma constitution, amended in 1992, requires that either a 75 percent majority of the legislature or a vote of the people is necessary to raise state taxes. Local property taxes have been stabilized by constitutional amendment in 1996, in Article 10, § 8 and 8B, by limiting assessment valuations and percentages of change from year to year.

## Selected Oklahoma Indicators

	1995	2002	2003	2004	2005
Real Gross State Product (\$Mil)	71,819.00	86,689.70	86,075.50	88,051.40	89,931.00
Real Personal Income (\$Mil)	69,156.40	90,524.70	91,820.60	93,930.00	96,841.30
Wage and Salary Income (\$Mil)	31,587.30	44,154.30	44,791.80	46,105.40	48,127.40
Ratio OK/US Per Cap Income-%	0.83	0.87	0.88	0.88	0.88
Unemployment Rate-%	4.7	4.5	5.7	4.5	4.2
Commercial Bank Total Deposits (\$Mil)	28,040.70	35,007.60	35,344.90	34,628.10	34,894.30
Commercial Bank Total Loans (\$Mil)	18,162.60	27,569.70	28,248.40	27,688.50	28,829.20
Taxable Retail Sales (\$Mil)	24,584.00	31,895.10	32,319.80	34,120.60	35,630.70

Source: 2005 Oklahoma Economic Outlook, College of Business Administration, Oklahoma State University

# Oklahoma Gross State Product by Industrial Sector

Actual (1970, 1980, 1990, 1995, 1998, 1999, 2000, 2001, and 2002) in Millions

Major Industry	1970	1980	1990	1995	1998	1999	2000	2001	2002
	Actual (\$)	Actual (\$)	Actual (\$)	Actual (\$)	Actual (\$)	Actual (\$)	Actual (\$)	Actual (\$)	Actual (\$)
Agriculture	483	1,228	1,657	1,570	1,363	1,447	1,629	1,502	1,453
Mining	1,978	6,646	4,668	2,560	1,978	2,385	4,050	4,036	3,640
Contract Construction	494	1,815	1,653	2,202	3,038	3,385	3,579	4,031	3,972
Manufacturing-Durable	936	3,464	6,664	6,881	8,482	8,865	9,094	7,142	6,746
Manufacturing-Nondurable	632	2,119	3,769	5,322	3,828	4,168	4,433	4,182	4,062
Wholesale and Retail Trade	1,766	5,784	8,829	11,390	11,327	11,787	12,094	12,672	13,757
Finance, Insurance, and Real Estate	1,491	5,366	6,521	8,446	11,721	12,537	13,289	14,102	14,941
Transportation & Utilities	1,138	3,309	5,568	7,131	5,095	5,038	5,230	5,572	5,468
Services	1,117	3,974	8,913	11,940	16,004	16,725	17,516	19,600	21,529
Government-Federal	930	1,889	2,283	2,698	5,626	4,759	5,160	5,215	5,428
Gov.-State & Local	829	2,548	5,823	7,329	8,717	9,244	9,742	10,439	10,963

Source: 2004 U.S. Department of Commerce, Bureau of Economic Analysis

# Oklahoma Wage and Salary Employment by Industrial Sector

## Actual (1970, 1980, 1990, 1995, 2000) and Forecast (2004, 2005)—in Thousands

Major Industry	1970	1980	1990	1995	2000	2004	2005	1970-80	1980-90	1990-95	1995-00	2004-05
	Actual (\$)	Actual (\$)	Actual (\$)	Actual (\$)	Actual (\$)	Forecast	Forecast	Growth Rate (%)	Growth Rate (%)	Growth Rate (%)	Growth Rate (%)	Growth Rate (%)
Total	763	1,138	1,193	1,315	1,462	1,459	1,482	4.10	0.50	1.90	1.60	1.60
Mining	39	75	43	32	27	31	33	6.8	-5.3	-6.1	-2.5	6.1
Construction	39	57	40	48	62	63	65	3.9	-3.6	4	4.7	3.6
Manufacturing-Durable	81	124	108	108	118	92	94	4.4	-1.4	0	2	1.6
Manufacturing-Nondurable	53	67	61	62	60	49	49	2.4	-1	0.5	1.1	-0.2
Wholesale and Retail Trade	169	266	281	313	237	224	225	4.7	0.5	2.2	2	1.5
Finance, Insurance & Real Estate	37	57	60	65	82	84	85	4.3	0.7	1.6	2.8	0.5
Transportation, Utilities	52	69	69	73	57	53	54	2.7	0	1.5	2.1	1.1
Services	116	195	273	344	516	537	550	5.3	3.4	4.7	4.5	8.9
Government, Federal	58	49	51	44	45	45	45	-1.7	0.4	-3	2.3	1.8
Government, State & Local	119	180	208	226	237	249	250	4.2	1.5	1.4	1.2	0.5

Source: 2005 Oklahoma Economic Outlook, College of Business Administration, Oklahoma State University



# Major Employers in Oklahoma

Company Name	Address	City	Zip	# of Emp.	Phone	Web Address
State of Oklahoma		Statewide		35,000	405-521-2141	www.ok.gov
Tinker Air Force Base (including Air Logistics Center)		Oklahoma City	73145	26,000/17,900 <sup>1</sup>	405-732-7321	www.tinker.af.mil
Wal-Mart and Sam's Club		Statewide		25,600	405-207-5000	
Fort Sill		Lawton	73503	18,000/7,500 <sup>1</sup>	580-442-8111	sill-www.army.mil
University of Oklahoma	660 Parrington Oval	Norman	73019	14,100	405-325-2961	www.ouhsc.edu
Oklahoma State University	107 Whitehurst Hall	Stillwater	74078	11,500	405-744-5000	
American Airlines	3900 Mingo Road, MD 284	Tulsa	74116	9,100	918-292-2579	www.aa.com
U.S. Postal Service	320 SW 5th	Oklahoma City	73125	8,706		
Tulsa Public Schools	PO Box 470208	Tulsa	74147	7,000	918-746-6303	
Sonic Corporation	101 Park Avenue	Oklahoma City	73102	6,000	405-280-7654	www.sonicdrivein.com
Oklahoma City Independent School District #89	PO Box 25428	Oklahoma City	73125	5,900	405-297-6520	
Integrus Health	3366 NW Expressway	Oklahoma City	73112	5,850	405-949-6066	www.integrus-health.com
City of Oklahoma City	200 N. Walker	Oklahoma City	73102	4,900	405-297-2345	www.okc-cityhall.org
YUM! Brands		Statewide		4,500		
City of Tulsa	200 Civic Center	Tulsa	74103	4,220	918-596-2100	www.cityoftulsa.org
St. Francis Hospital	6161 S. Yale	Tulsa	74136	4,100	918-494-2200	
St. John Medical Center, Inc.	1923 S. Utica	Tulsa	74104	4,050	918-744-2345	
SBC (formerly Southwestern Bell)	800 N. Harvey	Oklahoma City	73102	3,500	405-236-6611	
W. H. Braum	3000 NE 63rd	Oklahoma City	73121	3,500	405-478-1656	www.braums.com
Express Personnel Services	5909 NW Expressway Ste 150	Oklahoma City	73132	3,400	405-720-1000	
General Motors Corporation	PO Box 26527	Oklahoma City	73126	3,400	405-733-6011	www.gm.com
OU Medical Center (HCA Healthcare of Okla., Inc.)	1200 Everett Dr.	Oklahoma City	73104	3,200	405-271-4700	www.oumedcenter.com
Hertz	5601 NW Expressway	Oklahoma City	73132	3,100	405-721-6440	

Company Name	Address	City	Zip	# of Emp.	Phone	Web Address
SSM Healthcare of Oklahoma	PO Box 205	Oklahoma City	73101	3,000	405-272-7000	www.saintsok.com
Albertson's, Inc		Statewide		2,853		
Lawton Public Schools	PO Box 1009	Lawton	73502	2,750	580-357-6900	www.lawtonps.org
Dollar General Stores	401 General Dr	Ardmore	73401	2,600	580-389-5602	www.dollargeneral.com
Halliburton Energy Services	PO Box 1431	Duncan	73534	2,600	580-251-3760	www.halliburton.com
Putnam City Independent School District #1	5401 NW 40th Street	Oklahoma City	73122	2,600	405-495-5200	www.putnamcityschools.org
Mike Monroney Aeronautical Center (FAA)	AMC-5, PO Box 25082	Oklahoma City	73125	2,580	405-954-7700	www.mmac.jcabi.gov
BOK Financial Corp. (Bank of Oklahoma)	PO Box 2300	Tulsa	74192	2,520	918-588-6000	www.bokf.com
Edmond Public Schools	1001 W Danforth Rd	Edmond	73003	2,500	405-340-2800	www.edmond.k12.ok.us
Goodyear Tire & Rubber Co	1 SW Goodyear Blvd	Lawton	73505	2,500	580-531-5700	www.goodyear.com
Hobby Lobby Stores	7707 SW 44th Street	Oklahoma City	73179	2,500	405-745-1100	www.hobbylobby.com
United Parcel Service	901 S. Portland	Oklahoma City	73108	2,500	405-948-3891	
OGE Energy (OG&E and Enogex)	321 N. Harvey Ave.	Oklahoma City	73101	2,460	405-553-3000	www.oge.com
Dillard's		Statewide		2,425		
ConocoPhillips	411 S Keeler Ave	Bartlesville	74003	2,400	918-661-6600	www.conocophillips.com
Hillcrest Medical Center	1120 S. Utica Ave.	Tulsa	74116	2,350	918-599-1000	
Moore Public Schools	1500 SE 4th Street	Moore	73160	2,320	405-793-3000	www.moore.k12.ok.us
Mazzio's Corporation		Statewide		2,300		
Mercy Health System	4300 W Memorial Road	Oklahoma City	73120	2,300	405-755-1515	
Sodexo Operations		Statewide		2,300		
Homeland Stores	PO Box 25008	Oklahoma City	73125	2,200	405-879-6600	www.homeland.com
Tulsa Community College	6111 E. Skelly Dr. #200	Tulsa	74135	2,200	918-631-7000	www.tulsacc.edu
Williams Companies, Inc.	1 Williams Cir.	Tulsa	74172	2,200	918-573-2000	www.twc.com
Broken Arrow Public Schools	601 S. Main	Broken Arrow	74012	2,140	918-251-8541	www.www.ba.k12.ok.us
Grace Living Centers	4415 Highline	Oklahoma City	73108	2,100	405-943-1144	

Company Name	Address	City	Zip	# of Emp.	Phone	Web Address
Midwest City School District #52	PO Box 10630	Midwest City	73140	2,100	405-737-4461	www.mid-dcl.net
ConocoPhillips	PO Box 1267	Ponca City	74602	2,000	580-767-3456	www.conocophillips.com
Tyson Foods	200 Hall Boulevard	Ponca City	74601	2,100	580-762-6400	www.tyson.com
ONEOK Inc	PO Box 871	Tulsa	74117	2,000	918-590-3393	www.oneok.com
MCI	907 S Detroit Avenue	Tulsa	74117	2,000	918-590-3393	
University of Central Oklahoma	100 N. University Dr.	Edmond	73034	2,000	405-974-2000	www.ucook.edu
WorldCom, Inc.	907 S Detroit Ave	Tulsa	74117	2,000	918-590-3393	
Brinker International, Inc.		Statewide		1,850	972-980-9917	
Norman Regional Hospital	901 N. Porter	Norman	73071	1,850	405-307-1000	www.normanregional.com
TCI Marketing	1141 W 15th Street	Edmond	73013	1850	405-359-7444	
Michelin North America	1101 Uniroyal Rd	Ardmore	73401	1,825	580-226-1200	www.michelin.com
Arby's Roast Beef		Statewide		1,800		
Bridgestone/Firestone Inc (Dayton Tire)	PO Box 24011	Oklahoma City	73124	1,800	405-280-3000	www.bridgestone-firestone.com
J.C. Penney		Statewide		1,800		
Cherokee Nation of Oklahoma	PO Box 948	Tahlequah	74465	1,790	918-456-0671	www.cherokee.org
McDonald's Restaurants of Oklahoma, Inc.		Statewide		1,750		
Union Public Schools	5656 S. 129th E. Ave.	Tulsa	74134	1,750	918-459-5432	www.unionps.org
U.S. Dept of Vets Affairs Medical Center	921 NE 13	Oklahoma City	73104	1,700	405-270-0501	www.va.gov
United Supermarkets of Oklahoma, Inc.	PO Box 557	Altus	73522	1,700	580-482-1414	www.unitedok.com
Northeastern Okla. State University	600 N. Grand	Tahlequah	74464	1,650	918-456-5511	www.nsuok.edu
Sears, Roebuck & Co.		Statewide		1,650		
Georgia-Pacific Corp	4901 Chandler Rd	Muskogee	74403	1,600	918-683-7671	www.gp.com
Norman Public Schools	131 S. Flood	Norman	73069	1,600	405-364-1339	www.norman.k12.ok.us
Oklahoma County	320 Robert S. Kerr	Oklahoma City	73102	1,600	405-713-1503	www.oklahomacounty.org
Reasers Discount Foods		Statewide		1,600		

Company Name	Address	City	Zip	# of Emp.	Phone	Web Address
Red Lobster Inns of America		Statewide		1,600		
State Farm Insurance	12222 State Farm Boulevard	Tulsa	74146	1,600	918-621-3000	
Target Stores		Statewide		1,600		
University of Tulsa	600 S College Avenue	Tulsa	74104	1,600	918-631-2000	
Whirlpool Corporation	7301 Whirlpool Drive	Tulsa	74117	1,600	918-274-6000	www.whirlpool.com
AmTrans of OK (Navistar)		Tulsa		1,552	918-833-4000	www.navistar.com
Jenks Public Schools ISD#5	First and 'B' Streets	Jenks	74037	1,540	918-299-4411	www.jenks.org
MidFirst Bank	501 W I-44 Service Rd.	Oklahoma City	73118	1,528	405-840-7600	www.midfirst.com
West Corp.	3810 S. 103 E.	Tulsa <sup>4</sup>	74146	1,525 <sup>4</sup>	918-664-3100	www.west.com
General Labor LP	2016 N MacArthur	Oklahoma City	73118	1,500		
Seagate Technology Inc	10321 W Reno Ave	Oklahoma City	73127	1,500	405-324-3000	www.seagate.com
Deaconess Hospital	5501 N. Portland	Oklahoma City	73112	1,490	405-604-6000	www.deaconessokc.com
Tulsa County	500 S. Denver	Tulsa	74103	1,480	918-596-5095	www.tulsaco.org
Unit Parts Co	PO Box 26021	Oklahoma City	73126	1,480	405-677-3361	www.upc.com
America OnLine, Inc.	2720 Villa Prom	Oklahoma City	73107	1,475	405-440-6600	
Convergys Corp.	1705 S Broadway	Moore	73160	1,450	405-979-6400	
Corrections Corporation of America <sup>6</sup>				1,450		
Dollar Thrifty Automotive Group	5330 E 31st Street	Tulsa	74135	1,450	918660-0033	
Arrow Trucking Co. Inc.	PO Box 3570	Tulsa	74101	1,400	918-446-1441	
BancFirst Corporation	PO Box 26788	Oklahoma City	73126	1,400	405-270-1086	www.bancfirst.com
Boeing Co	PO Box 582808	Tulsa	74158	1,400	918-835-3111	www.boeing.com
Comanche County Memorial Hospital	3401 W Gore Blvd	Lawton	73505	1,400	580-355-8620	
EDS (formerly Sabre Inc.)	4000 N. Mingo Road	Tulsa	74116	1,400	918-292-6400	
Home Depot		Statewide		1,400		
Oklahoma Nursing Homes Ltd.	P O Box 429	Sallisaw	74955	1,400	918-775-4439	

Company Name	Address	City	Zip	# of Emp.	Phone	Web Address
Walgreen Co.		Statewide		1,400		www.walgreens.com
Charles Machine Works Inc	PO Box 66	Perry	73077	1,311	580-336-4402	www.ditchwitch.com
AT&T Wireless	13801 Wireless Way	Oklahoma City	73134	1,300	405-286-7000	
Bar S Foods	802 SW Goodyear Boulevard	Lawton	73505	1,300	580-510-3300	www.bar-s.com
Midwest Regional Medical Center	2825 S. Parklawn Dr.	Midwest City	73110	1,300	405-610-4411	www.midwestregional.com
Sprint PCS	6401 NW Expressway	Oklahoma City	73132	1,300	405-773-2990	
Warehouse Market	6207 S. Peoria	Tulsa	74136	1,300	918-749-6621	
Tulsa Regional Medical Ctr	744 W 9th St # 210	Tulsa	74127	1,275	918-587-2561	www.tulsaregional.com
Arvest Bank Operations		Statewide		1,250		
Nordam Group Inc	PO Box 3365	Tulsa	74101	1,250	918-587-4105	www.nordam.com
Blue Cross/Blue Shield	PO Box 3283	Tulsa	74102	1,225	918-561-9900	www.bchsok.com
Altus Air Force Base		Altus	73523	1,220	580-482-8100	www.altus.af.mil
Vance Air Force Base		Enid		1,215		www.vance.af.mil
Cox Business Services	210 Park Avenue Ste. 2640	Oklahoma City	73102	1,200	405-600-6000	
Kmart		Statewide		1,200	248-641-8151	
Kwikset Corp	500 Industrial Rd	Bristow	74010	1,200	918-367-5511	www.bdk.com
York International Corp	5005 N Interstate Dr	Norman	73069	1,200	405-364-4040	www.york.com
Muskogee Regional Medical Ctr.	300 Rockefeller Dr.	Muskogee	74401	1,175	918-682-5501	
Adecco North America	2601 NW Expressway Ste. 903	Oklahoma City	73112	1,170		
Baker Hughes Inc.	6209 S Sooner Road	Oklahoma City	73135	1,125	405-672-7881	www.bakerhughes.com
Cingular	15901 E. Skelly Drive	Tulsa	74116	1,100	918-520-3752	
Southwestern Oklahoma State University	100 Campus Dr.	Weatherford	73096	1,080	580-772-6611	www.swosu.edu
Bartlesville Independent School District I-30	PO Box 1357	Bartlesville	74005	1,050	918-336-8600	
CrestDiscount Foods, Inc.	249 North Douglas	Oklahoma City	73110	1,050	405-733-2330	www.crestfoodsok.com
Choctaw Nation of Oklahoma	PO Drawer 1210	Durant	74701	1,050	580-924-8280	www.choctawnation.com

Company Name	Address	City	Zip	# of Emp.	Phone	Web Address
Oklahoma City University	2501 N Blackwelder	Oklahoma City	73106	1,050	405-521-5857	www.okcu.edu
Metris Companies, Inc.	4500 S Garnett Rd	Tulsa	74146	1,021	918-669-8800	www.metriscompanies.com
AEP - formerly Central & Southwest Services/PSO		Tulsa	74121	1,000	918-599-2000	
APAC Customer Services Inc.	940 SW 104th Street	Oklahoma City	73139	1,000	405-692-7222	www.apacteleservices.com
Foleys Department Stores		Statewide		1,000		
Great Plains Coca-Cola Bottling Co	227 N Quapah Ave	Oklahoma City	73107	1,000	405-280-2000	www.grcc.com
Jane Phillips Memorial Medical Center	3500 SE Frank Phillips	Bartlesville	74006	1,000	918-333-7200	
McAlester Army Ammunition Plt	1 Tree Rd # C	McAlester	74501	1,000	918-420-6452	mcalestr-www.army.mil
Oklahoma Publishing Co	PO Box 25125	Oklahoma City	73125	1,000	405-475-3311	www.newsofok.com
Taco Bueno Restaurants Inc.		Statewide		1,000		
The Gap Inc.		Statewide		1,000		

<sup>1</sup>Military/civilian

<sup>2</sup>Also in Lawton, Norman, Tulsa, and Stillwater

<sup>3</sup>Total in all locations

<sup>4</sup>Also 1331 W. Memorial, Okla. City 73114

<sup>5</sup>Total for all locations

<sup>6</sup>Located in Cushing, Watonga, Sayre, Holdenville, and Tulsa

<sup>7</sup>1,200 in all locations: Altus, Clinton, and Lawton

# Mining/Petroleum Overview

Source: Dr. Charles Mankin, Oklahoma Geological Survey

The United States Geological Survey estimated the value of nonfuel mineral production in Oklahoma was \$453 million in 2000. That represents a 2.7 percent increase from the final figures for 1999. Crushed stone lead the state in the value of nonfuel mineral production exceeding \$140 million. Based on value, crushed stone was followed by cement (masonry and portland), construction sand and gravel, industrial sand and gravel, gypsum, iodine and lime. Almost 48 percent of the total value is due to the combined values of three of Oklahoma's four major construction materials: crushed stone, construction sand and gravel, and gypsum (descending order of value). All nonfuel minerals showed increases in value in 1999 except for Grade-A and crude helium, crushed stone, and common clay. Oklahoma leads the U.S. in the production of gypsum; ranks fifth in feldspar production; ranks second of four states producing tripoli; ranks third of three states producing helium and is the only state producing iodine.

## Value of Petroleum and Natural Gas Production, 1973–2001

Oklahoma's enormous mineral reserve can be divided into three types of mineral products: mineral fuels, metals, and non-metals. Mineral fuels are materials that can be burned, such as petroleum (crude oil and natural gas), and coal. These account for more than 90 percent of Oklahoma's annual mineral output. Metals are substances that can be melted and molded into any shape desired and are usually hard and heat resistant. There presently are no metals mined in Oklahoma. Zinc and lead are the principal metals previously mined in Oklahoma, but copper, manganese, iron and uranium also were produced. A non-metal (industrial mineral) is any rock, mineral or other select naturally occurring or synthetic material of economic value often used in combination with other materials such as sand and stone used in concrete. The principal industrial minerals produced in Oklahoma include crushed stone, portland cement, construction sand and gravel, industrial sand and gravel, iodine, and gypsum. Other Oklahoma non-metals include tripoli, feldspar, helium, common clay, granite, salt, volcanic ash, and lime.

## Nonfuel Mineral Production, 1999

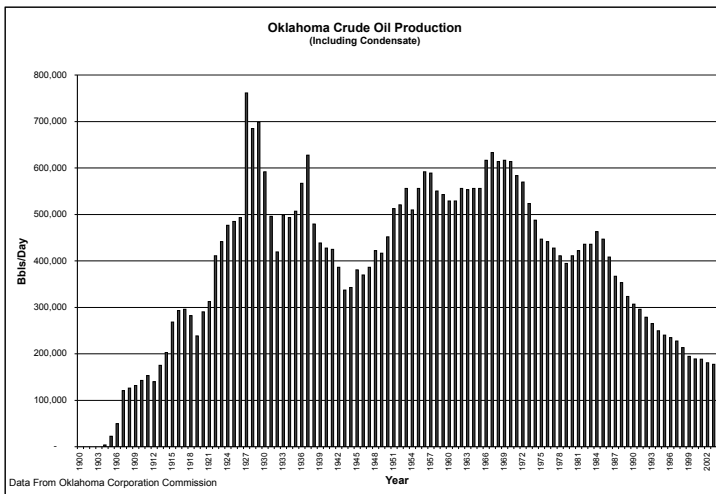
Mineral	Quantity (in metric tons)	Value (in thousands)
Cement	W	W
Common Clay	757,000	\$2,050
Gypsum	3,510,000	\$20,100
Iodine	1,620	\$23,800
Sand & Gravel	11,670	\$72,100
Stone	39,780	\$145,635

W = data withheld to avoid disclosing company proprietary data

Note: Total value in Table does not equal the total value of nonfuel mineral production in Oklahoma for 1999. The difference is in mineral values not released for public distribution.

Because of low oil and gas prices for much of 1998 and 1999, production of both oil and gas continued to decline. Increase in prices for both oil and gas during the last one-half of 1999 did produce an increase in gross revenue, but production continued to lag.

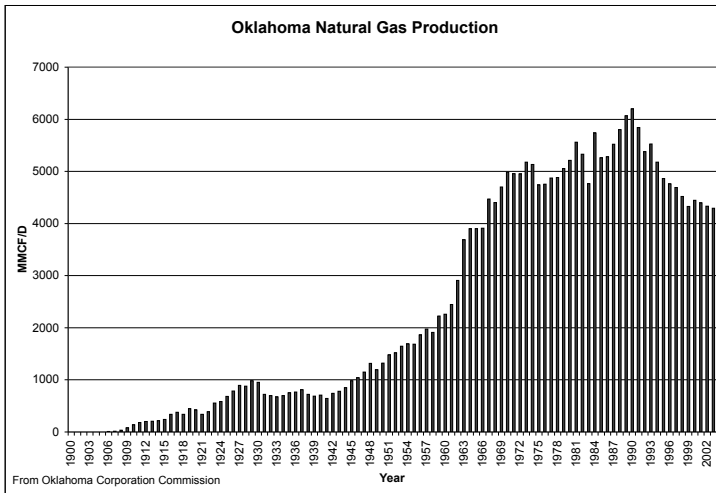
Oklahoma continues to be the third leading U.S. producer of natural gas and the second largest state producer after Texas and the Federal Continental Shelf. Declines in production in both Louisiana and New Mexico continued their positions in third and fourth place.



The outlook for Oklahoma’s oil and gas industry has never been brighter. Rising global oil demand, especially in developing countries, has continued to reduce the world’s spare productive capacity. This has driven oil prices upward and helped maintain an average state price for the last five years of about \$30/barrel. Increased natural gas demand, combined with a flat production curve in the U.S., has kept the



average gas price in Oklahoma above \$4.00 per thousand cubic (MCF) feet for the same period.



Natural gas is especially important to Oklahoma because it alone maintains a positive state energy balance. In spite of our ranking as the fifth largest oil producer, oil consumption in Oklahoma is about 50 percent greater than production. In addition, local coal production due to its high sulfur content, accounts for less than 10 percent of state consumption. However, gas production is still produced at three times state consumption, which places Oklahoma third among the nation's gas producing states.

Although the last ten years have seen oil and gas production decline 1 to 3 percent per year, high prices in 2004 should maintain state production at or just below 2003 levels. Gross industry revenues for 2004 are projected to be about \$10 billion, with total hydrocarbon production, on a barrel of oil equivalency (BOE), roughly equal to that in 1927; the year of peak oil production. Natural gas today represents 80 percent of state hydrocarbon production and two-thirds the peak rate that was reached in 1990.

Due to the state's modest oil and gas production declines, tax revenues are more closely tied to price fluctuations than to production volume. The average oil price for 2004 is projected at \$40 per barrel, and natural gas is expected to be roughly equivalent to the \$5/MCF level reached in 2003. Unadjusted for inflation, the gas prices seen in the last two years are the highest ever paid in the state. Oklahoma's gross production tax receipts, which in 2003 were about \$679 million, are expected to rise to about \$727 million in 2004. This \$48 million increase is on top of a rise of \$244 million from 2002 to 2003. It was in 2002 that natural gas prices fell below \$3/MCF, which was the key factor precipitating the state budget shortfall in that year.

# Agriculture Overview

Information for this section was provided by Craig Flynn, Agricultural Statistics Division, Oklahoma Department of Agriculture. Additional information (including maps) was found in the *Atlas of Oklahoma*, edited by Tom Wikle, published by Oklahoma State University, 1991.

Environmental conditions such as climate and soil type have a great influence on agriculture practices in the state. Oklahoma lies between the long growing season of the South and the shorter growing season of the North. The average length of this season, also called the freeze-free period, ranges from 168 days in the northwestern Panhandle to about 240 days along the Red River in south central and southern sections of the state.

In most circumstances, individual farming areas include more than one type of crop since it is more economical to grow a variety of crops within one area; however, wheat is planted on more acres than any other crop in Oklahoma. Wheat production is centered primarily in the northwestern and north central areas of the state. Oklahoma normally ranks second in winter wheat production, surpassed only by Kansas.

The Panhandle area of Oklahoma is a mixed area of rangeland and valuable irrigated cropland. Wheat, corn, and grain sorghum are grown to help support a large cattle feeding industry and a recent expansion in hog production.

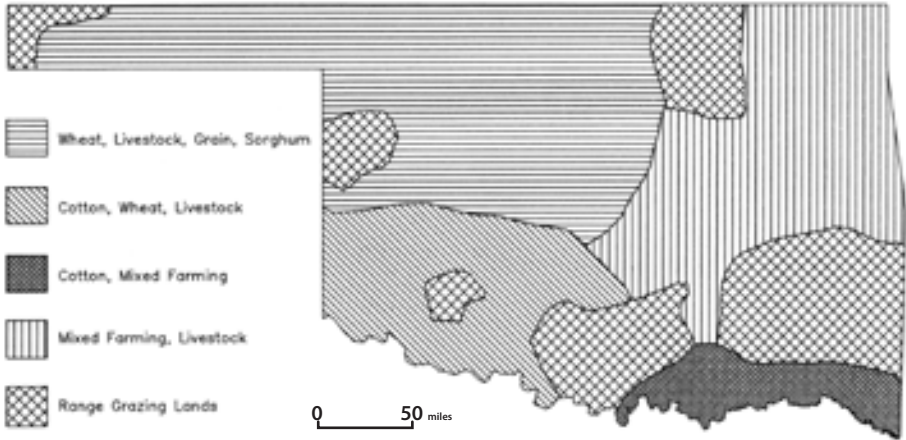
Cotton and grain production is extensive in the southwestern corner of the state. The warm climate in this area is extremely hospitable to cotton production and provides an annual growing season in excess of 210 days. The area receives between twenty-two and thirty inches of rainfall annually.

A wide variety of crops are grown in the mixed-farming region in the eastern part of the state. While soybeans play an important role on farms within this zone, farmers supplement their income by growing crops such as corn, peanuts, strawberries, peaches, and assorted vegetables. Contract broiler operations, egg laying flocks, and hog production facilities are found in this area of the state, which also has a large number of cattle ranches and a significant number of dairy farms.

The range-grazing lands of Oklahoma are spread across the state. The six regions shown on the map generally have rich soils and plentiful supplies of water to support grasses. Ranches located in areas where soils are not as rich make up for the deficit by increasing the number of grazing acres per animal.

The years between 1879 and 1900 saw a rapid increase in farm production because of an expansion in the labor force and more efficient technology in the area of horse drawn plows, cultivators, and grain harvesters. During this period, the total acreage of cropland in the United States grew rapidly. This expansion period ended by 1920.

## Agricultural Regions



Between 1935 and 1960, agricultural output per man hour increased by more than four times, while crop production per acre nearly doubled. It was also during this time that many subsistence farms were eliminated by larger, more specialized farms. Although the number of farms in the U.S. in the mid-1930s was almost seven million, by the mid 1970s, that number had dropped to about two million.

The number of farms in Oklahoma in recent years (since the 1997 Census of Agriculture) has fluctuated between 80,000 and 84,000. The number of small farms has increased, especially near urban areas, where the urge to have the benefits of a rural lifestyle has resulted in an increase in the number of people living in rural areas and working in the cities. These people have a few head of cattle, some horses, and may grow some hay to feed their livestock.

Above average wheat crops and strong cattle markets in 2003 resulted in an improved cash flow for the farmers and ranchers in Oklahoma. However, many farm families still have at least one family member working off the farm in order to maintain their standard of living. In 2003 net farm income per farm averaged \$24,392, an improvement over the 2001 and 2002 average of \$13,535 and \$10,839 respectively.

# 2004 Crop Weather Review

Jill Bishop

**January**—Temperatures during January ranged from mild to bitter cold. Rain and snow during the month helped soil moisture supplies. Wheat, rye, and oat conditions were rated as mostly good to fair. Forty-six percent of the winter wheat was being grazed. Livestock conditions were also mostly good to fair for the month. Hay supplies were mostly average.

**February**—Unseasonably warm temperatures and some much needed rain helped to slightly boost the winter wheat conditions. Winter wheat being grazed held steady at 46 percent. Livestock conditions were still mostly good and hay supplies were mostly average.

**March**—This was the eleventh warmest March on record and, when coupled with some good rains early in the month, crop and livestock conditions flourished. Winter wheat conditions gradually improved during the month. Wet fields early in the month slowed down row crop seedbed preparations but producers were able to make good progress on seedbed preparation by mid March. Corn planting got underway late in March. Livestock were in good condition.

**April**—With tornadoes, flash floods, hail storms and a late freeze, April was a distinct change from the spring like weather recorded in March. Despite all of this, wheat development was nearly two weeks ahead of schedule. The warm weather combined with some rain provided ideal conditions for small grains. Row crop planting went into full swing during April and producers began to cut hay by month's end. The spring conditions promoted pasture growth with pastures being in fair to good condition. Livestock conditions continued to be mostly good to excellent.

**May**—The driest May since 1892 turned out to be just what the doctor ordered in regards to wheat harvest. Normally, wheat harvest does not begin until late May, but by mid May, ideal conditions advanced wheat progress and harvest began. A fourth of the crop was harvested by month's end. Planting activities were winding down for some of the row crops by the end of June. The row crops were in mostly fair to good condition. The first cutting of alfalfa was virtually complete. Pastures were in mostly good to fair condition but rain was needed to prevent deteriorating conditions.

**June**—Going from the driest May to the fourteenth wettest June since 1892 had both a good and bad impact on crops in Oklahoma. The good was that the rain and cooler temperatures created ideal growing conditions for the row crops. All of the row crops were in good condition. The bad was that wheat harvest was delayed off and on throughout the month. However, wheat harvest was nearly complete by month's end. Hay harvest was also delayed throughout the month. The cooler temperatures and rain also had a positive impact on pasture growth.

**July**—Unseasonably cool temperatures and wet weather were the key words for July. For a month typically known as hot and dry, the hot temperatures did not occur until mid month. However, the rains throughout the month kept conditions ideal for row

crops. Row crop progress was near normal for all of the crops. Wheat harvest was complete by early July. Pastures and livestock continued to be in good to excellent condition due to the unusual July weather.

**August**—Rainfall continued throughout the month and temperatures remained unseasonably cool. In fact, August was the fifth coolest on record. In a month where row crops generally dry out due to the heat, instead row crops prospered with most rated in good to excellent condition. Corn, sorghum, and soybean harvest got underway during the month. Livestock, pasture, and hay conditions were good to excellent. Wheat seedbed preparations were at 64 percent by the end of August, well above the five-year average of 55 percent.

**September**—The wet and cool trend came to a halt as September became the twelfth driest and forty-third warmest on record. The dry conditions did slow down small grain planting as producers had to wait for moisture to continue seeding. However, nearly half of the state's wheat crop was planted by month's end. The warmer temperatures helped row crops but progress for corn and sorghum lagged behind normal. Cotton and peanut harvest got underway. The fifth cutting of alfalfa was at 64 percent and some producers were even beginning to get a sixth cutting which is unusual for Oklahoma. Over 80 percent of the livestock were in good to excellent condition.

**October**—Rain fell across the state during every week in October. The rather wet October slowed down wheat planting and limited harvesting of row crops. The sixth cutting of alfalfa was at 40 percent. The rain and moderate temperatures have supported rapid growth progress for wheat. The condition for livestock continued to be good to excellent.

**November**—Rain continued throughout the month of November leaving producers with less than a week available for field work for the month. It was so wet that wheat seeding only increased four points with 96 percent of the crop planted by the end of November. There were also still a large amount of unharvested row crops due to the rain and muddy field conditions. Many producers had to begin feeding livestock due to the muddy pasture conditions. Livestock conditions remained good to excellent.

**December**—Drier conditions, combined with unusually warm temperatures throughout the month of December allowed fields to slightly dry out so producers could harvest the remaining row crops and plant small grains. Some producers were still planting wheat into December. Pastures were in mostly good condition due to the above average rainfall received throughout the summer and fall. Livestock conditions ranged from mostly good to fair. Hay supplies were rated as mostly above average.

# Agricultural and Livestock Production

## Highlights of Oklahoma Agriculture

Source: 2002 Census of Agriculture, Oklahoma Department of Agriculture  
This Census is published every five years by the U.S. Department of Agriculture.  
The next Census will be compiled in Spring 2007.

	1987	1997	2002
<b>Number of Farms</b>	70,228	74,214	83,300
<b>Land in Farms (acres)</b>	31,541,977	33,218,677	33,661,826
<b>Average Size of Farm (acres)</b>	449	448	404

### Value of Land and Buildings (based on sample of farms)

Average per farm (\$)	\$215,024	\$271,996	\$285,730
Average per acre (\$)	480	610	699

### Estimated Market Value of All Machinery and Equipment (based on sample of farms)

Average per farm (\$)	\$29,465	\$36,936	\$42,155
Farms by Size			
1 to 9 acres	3,666	2,505	3,091
10 to 49 acres	10,134	12,673	17,072
50 to 179 acres	22,331	24,681	28,776
180 to 499 acres	18,006	18,288	19,357
500 to 999 acres	8,405	8,155	7,668
1,000 acres or more	7,686	7,912	4,119

### Total Cropland

Farms	55,783	58,741	61,779
Acres	14,443,459	14,843,823	14,843,357

### Harvested Cropland

Farms	43,522	44,786	43,930
Acres	7,319,193	8,462,079	7,705,860

### Irrigated Land

Farms	3,029	2,710	2,942
Acres	478,737	506,459	517,553

	1987	1997	2002
<b>Market Value of Agricultural Products Sold</b> (\$ 000s)	\$2,714,892	\$4,146,351	\$4,456,404
Average per farm (\$ 000s)	38,658	55,870	53,498
Crops, including nursery and greenhouse crops (\$ 000s)	610,050	907,865	819,078
Livestock, poultry and their products (\$ 000s)	2,104,842	3,238,485	3,637,326

### Farms by Value of Sales

Less than \$2,500	\$18,501	\$20,476	\$29,927
\$2,500 to \$4,999	11,073	11,713	9,925
\$5,000 to \$9,999	11,999	12,341	12,452
\$10,000 to \$24,999	12,805	12,869	12,833
\$25,000 to \$49,999	6,300	6,234	7,373
\$50,000 to \$99,999	4,479	4,285	4,340
\$100,000 or more	5,071	5,296	5,256

<b>Total Farm Production Expenses</b> (\$ 000s)	2,359,468	3,576,456	4,069,112
Average per farm (\$)	33,594	48,186	48,186

### Net Cash Return from Agricultural Sales for the Farm Unit

# of farms w/\$1000 or more sales	70,235	74,222	83,282
Average per Farm	\$4,214	\$6,145	\$8,220

### Livestock and Poultry

Cattle and Calves Inventory			
Farms w/cattle	53,544	58,023	59,155
Number of head of cattle	4,537,774	5,321,161	5,324,240
Beef Cows			
Farms	44,130	49,281	50,465
Number	1,630,425	1,931,805	2,050,866
Milk Cows			
Farms	2,828	1,921	1,828
Number	90,499	87,647	86,270
Hogs and Pigs inventory			
Farms	3,710	3,002	2,491
Number	187,351	1,689,700	2,246,926
Hogs and Pigs sold			

	1987	1997	2002
Farms	3,090	2,082	2,256
Number	346,686	3,943,563	7,264,319
Sheep and Lambs inventory			
Farms	1,799	1,792	2,186
Number	120,479	74,596	80,128
Chickens 3 months old or older inventory			
Farms	5,703	3,293	4,085
Number	5,826,714	5,059,373	4,200,104
Broilers and other meat-type chickens sold			
Farms	556	632	871
Number	89,704,380	138,607,293	231,877,714

### Selected Crops Harvested

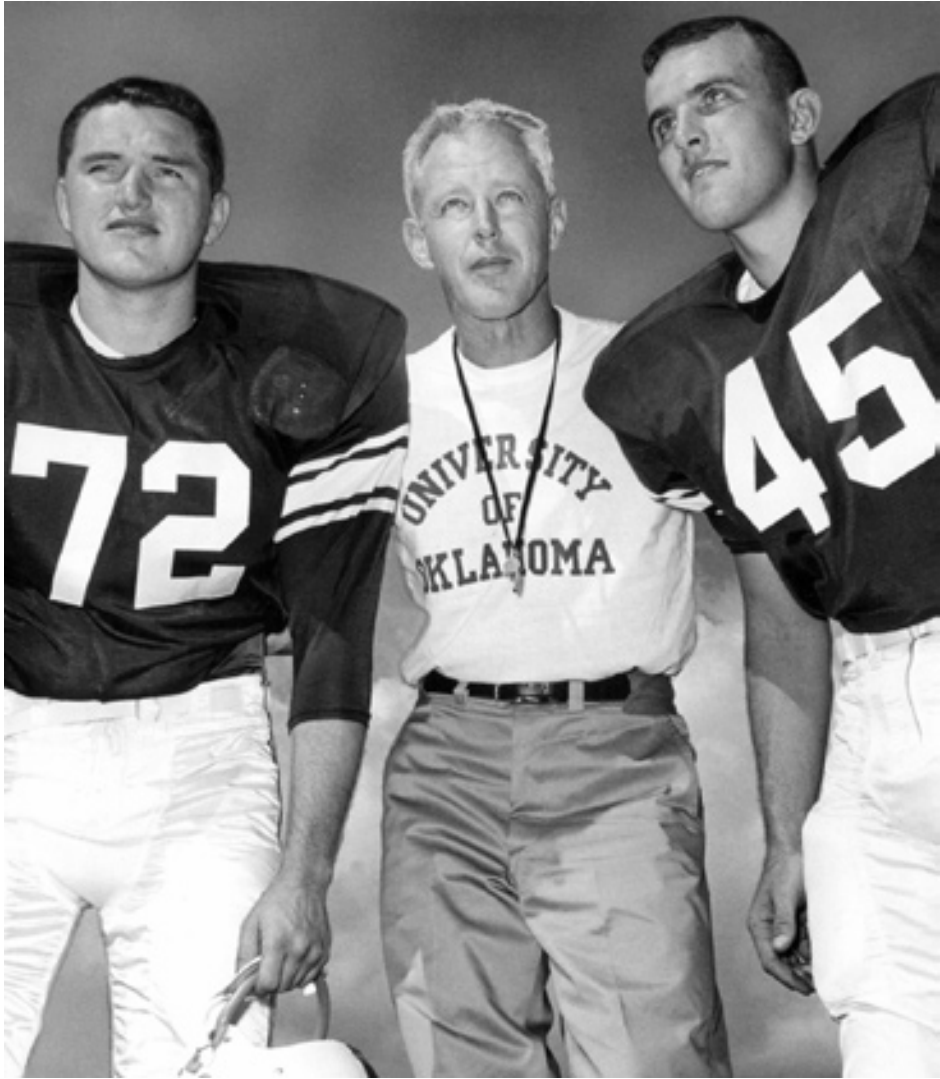
Sorghum for Grain or Seed			
Farms w/sorghum	18,644	2,557	1,264
Acres in state	339,368	417,872	262,032
Bushels in state	15,114,650	18,863,920	11,166,761
Wheat for Grain			
Farms	18,644	13,935	9,611
Acres	4,276,344	4,825,074	3,592,828
Bushels	113,464,955	141,302,977	102,044,001
Cotton			
Farms	2,913	849	581
Acres	360,299	176,962	172,228
Bales	306,388	190,186	210,027
Soybeans for Beans			
Farms	1,566	1,921	1,167
Acres	229,887	323,082	246,962
Bushels	5,622,675	9,498,068	6,218,396
Peanuts for Nuts			
Farms	1,088	662	418
Acres	86,469	68,340	53,390
Pounds	190,592,633	163,572,035	144,450,348
Hay—Alfalfa, other wild silage			
Farms	32,196	35,751	36,898
Acres	1,920,000	2,478,944	3,084,888
Tons, dry	3,430,874	4,651,859	5,802,990



## Agricultural Trade Statistics, 2003

Product	Oklahoma Exports (millions of \$)	U. S. Exports (millions of \$)
Wheat and products	280.3	5,326.8
Soybeans and products	20.3	8,287.5
Peanuts and products	4.4	187.7
Cotton and linters	33.0	2,726.7
Cotton Seed and products	1.3	102.9
Feed Grains and products	36.6	6,731.0
Tree nuts	4.6	1,489.9
Fruits and Preparations	1.6	3,545.3
Vegetables and Preparations	0.5	4,675.6
Live Animals & meat (excl. poultry)	92.6	6,483.0
Hides and skins	2.7	1,790.3
Poultry and products	40.5	2,105.4
Fats, oils and grease	2.5	538.5
Dairy products	0	1,033.6
Feeds and fodders	48.3	1,998.7
Seeds	6.8	813.1
Other (incl. processed foods)	10.4	6,213.9
Total	586.4	56,186.4

Note: The above data are based on the assumption that each state's contribution to exports is equal to each state's share of production or marketing. They should not be interpreted as an actual measure of the state's export. Totals in this chart for U.S. exports include Tobacco, Rice, and Sunflower seed and Sunflower Oil. These commodities are not listed, as Oklahoma has no exports in these categories.



Photograph copyright—The Oklahoma Publishing Company

Over a ten year period (1948–58), **Charles Burnham “Bud” Wilkinson** led teams at the University of Oklahoma to a record of 107–8–2, becoming the equivalent of baseball’s New York Yankees. As *Sporting News* declared in its 1994 obituary for the coach, “No one will ever approach Wilkinson’s 47-game winning streak at Oklahoma.” Perhaps equally important, Wilkinson managed this brilliant record with a dignity and grace that inspired loyalty and excellence from players such as 1962 co-captains Wayne Lee and Leon Cross.