OKLAHOMA'S OIL AND GAS ECONOMY

Economic Contribution Report

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REGIONTRACK
Regional Economic Forecasting and Analysis

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Defining Oklahoma's Oil and Gas Cluster

Why Measure the Cluster? Oklahoma has served as a major domestic oil and gas hub for more than a century and remains home to a substantial and growing concentration of oil and gas related activity. The largest and most visible components remain the two traditional activities of drilling and production. However, often ignored in evaluating the state's oil and gas presence is the large and vibrant group of ancillary oil and gas-related industries that have long operated across the state. The largest among these are refineries, petroleum product manufacturing, oil field machinery and equipment, pipelines, and surveying and mapping. Firms in these related industries are closely tied to oil and gas production and tend to locate within or adjacent to oil and gas producing regions over time.

The combination of the traditional drilling and production sectors along with key ancillary sectors is used in this report to define the Oklahoma oil and gas *cluster*. Clusters are identified using geographic concentrations of industries related by knowledge, skills, inputs, demand, and/or other linkages. The approach measures the relatedness of industries using economic input-output linkages, patterns in labor use, co-location of employment, and proximity of establishments. Only industries that are deeply integrated with the core oil and gas sectors are considered for inclusion in the state's oil and gas cluster.

By many measures, oil and gas is the largest and most strategic industry cluster in the Oklahoma economy. Empirical research continues to demonstrate that the concentration of an industry cluster such as oil and gas can have significant positive effects on a regional economy through knowledge spillovers, workforce sharing, and business formation. Wherever the core of an industry is based, related firms will follow. Most firms in the ancillary sectors of the oil and gas cluster likely would not be located within Oklahoma if traditional oil and gas drilling and production were not taking place in the state.

Cluster Industries. Throughout the report, the state's oil and gas cluster is defined using eight NAICS industry sectors at various levels of aggregation. The first three sectors include the traditional areas of drilling, production, and support activities: 1) *drilling new wells* (NAICS 213111), 2) *production of crude oil and natural gas* (NAICS 211), and 3) *support functions for drilling and production* (NAICS 213112). The remaining five sectors include industries with well-established ties to oil and gas drilling and production, including: 1) *refineries* (NAICS 324110), 2) *other forms of petroleum manufacturing* (NAICS 32419), 3) *oil and gas field machinery and equipment manufacturing* (NAICS 33313), 4) *pipelines* (NAICS 486), and 5) *surveying and mapping* (NAICS 541360).

Firms that comprise the state's oil and gas cluster are found upstream, midstream, and downstream in the oil and gas channel. The traditional tasks of drilling and exploration are the primary upstream activities but include other related sectors such as oil and gas field equipment manufacturing, seismology, surveying, mapping, data analysis, and other sectors. Firms engaged in the midstream activities of transportation, storage, and marketing include the state's extensive pipeline and storage sectors along with many firms engaged in marketing and wholesaling of oil and gas-related products. Firms engaged in downstream activities, primarily refining and processing, include the state's refineries, processing plants, and other forms of manufacturing from petroleum products.

Excluded Oil and Gas-Related Industries. In evaluating the state's oil and gas cluster, it is important to note that the approach used in this report is quite conservative in that it captures only those ancillary industries that are typically present across all oil and gas clusters. This approach can exclude related industry sectors that may have a more highly developed presence in some oil and gas producing regions, particularly highly developed regions such as Oklahoma, but not in others.

As a result, several additional industries that are closely tied to the state's oil and gas sector are not included in Oklahoma's oil and gas cluster. These sectors include Natural gas distribution (NAICS 221210), *Oil and gas pipeline construction* (NAICS 237120), *Petrochemical manufacturing* (NAICS 325110), *Industrial gas manufacturing* (NAICS 325120), *Cyclic crude, intermediate, & gum and wood chemical manufacturing* (NAICS 325194), *Plastics and resins manufacturing* (NAICS 325211), *Industrial valve manufacturing* (NAICS 332911), *Other industrial machinery manufacturing* (NAICS 333249), *Wholesale industrial machinery and equipment merchants* (NAICS 423830), *Petroleum bulk stations and terminals* (NAICS 424710), *Petroleum and petroleum products merchant wholesalers* 424720), and *Fuel Dealers* (NAICS 454310). These sectors are often classified within another cluster (e.g., chemicals, utilities, or construction) in some states rather than attributed to oil and gas. While this may be consistent with industry patterns in non-energy states, the size of these sectors is typically far larger in Oklahoma and other major oil and gas producing states yet go unaccounted for using standard cluster definitions. Hence, the definition used throughout the report is believed to represent a conservative definition of the size and breadth of the state's oil and gas cluster.

I. Introduction: Oklahoma's Oil and Gas Economy

Oklahoma's oil and gas cluster still functions as the centerpiece of the state's economy. The 2025 update shows that this is true even after a year of lower energy prices and subdued drilling. Using 2024 data, the **3,400** establishments operating in the cluster produced about **$31.0 billion** in state GDP and **$30.4 billion** in household earnings. The sector supported a little more than **103,000** workers and operated statewide. The cluster directly contributed about **11.8%** of all Oklahoma GDP and **17.5%** of all household earnings. The key point for 2025: even in a softer year, the state's oil and gas cluster made outsized contributions to the state economy.

This report starts with the **direct** footprint of each component of the cluster – extraction, drilling and completion, support services, pipelines, and refining. It then traces the **indirect and induced** effects that run through suppliers, contractors, household spending, and local government. What stands out in the 2025 data is that the **traditional upstream core** is still the anchor, but the **ancillary pieces** have become more important. Pipeline transportation now accounts for a little more than one-fifth of total cluster value added. Refining strengthened in 2024 as well. These parts of the cluster help smooth out swings in drilling and make the industry visible in both producing counties and the state's metro areas.

The 2025 numbers also confirm that oil and gas is mainly a **household earnings** story. The industry does not dominate Oklahoma's job totals, but it does dominate high-value income. Wage-and-salary jobs in the cluster pay well above the state average. On top of that is a very large group of high-earning proprietors tied to exploration, production, and field services. In 2024 the cluster accounted for a majority of all proprietor earnings in Oklahoma. That income is what drives many of the spillovers described later in the report - construction, trucking, business services, retail, and housing all benefit.

Fiscal effects remain a core contribution of the oil and gas cluster. Gross production tax receipts in FY2025 stayed above the $1 billion mark. A large share flowed to the state's General Revenue Fund, and the rest went to schools, counties, and other dedicated programs. Local governments continued to receive substantial ad valorem revenue from oil- and gas-related property, with producing counties getting the largest gains. These tax channels demonstrate how oil and gas activity in one part of the state shows up as budget capacity in another.

The industry still faces headwinds. Oil and gas production in Oklahoma has not fully returned to pre-pandemic highs. Drilling remains well below 2019 levels. Prices are more volatile than both producers and state and local governments would like. Even so, Oklahoma continues to rank among the leading energy states and to draw an unusually large share of GDP and income from this one cluster. While that degree of dependence presents some risk, the oil and gas cluster remains one of the state's most competitive assets.

The sections of the report that follow document these points in detail. They measure the size and structure of the cluster, compare 2024 performance with earlier years, describe current market and investment conditions, trace multiplier linkages across the rest of the economy, and summarize the tax flows that connect the industry to education, counties, and the state budget.

II. Economic Profile of Oklahoma's Oil and Gas Cluster

Gross Economic Contribution

Oklahoma's trademark oil and gas sector made a range of direct economic contributions to the state economy in 2024 (*Figure 1*).

The more than 3,400 business establishments operating in the state's oil and gas cluster:

- produced $31 billion in state gross domestic product (GDP)
- provided Oklahoma households with $30.4 billion in earnings
- provided employment for a combined 103,400 workers (including both wage & salary workers and self-employed proprietors)
- employed 38,140 wage and salary workers who earned $5.9 billion in compensation
- provided business opportunities for 65,300 self-employed proprietors who earned $24.5 billion in proprietor income

Figure 1. Economic Profile of Oklahoma's Oil and Gas Cluster (2024)

Cluster Industry Sectors	NAICS Code	Business Establish-ments	Value Added ($Mil.)	Household Earnings ($Mil.)			Employment		
			Gross Domestic Product	Total House-Hold Earnings	Employee Compen-sation	Pro-prietor Income	Total Employ-ment	Wage & Salary Employ-ment	Pro-prietor Employ-ment
Traditional Sectors:									
Oil & Gas Extraction	211	908	$17,523	$14,081	$2,524	$11,557	66,021	11,850	54,171
Oil & Gas Drilling	213111	103	481	523	268	255	3,067	1,827	1,241
Oil & Gas Support Activities	213112	1,575	2,474	2,690	1,378	1,312	19,715	11,740	7,975
Oil & Gas Drilling, Extraction, & Support		**2,585**	**$20,478**	**$17,294**	**$4,170**	**$13,124**	**88,803**	**24,416**	**63,387**
Ancillary Sectors:									
Refineries	324110	10	$2,224	$2,676	$363	$ 2,313	2,148	1,823	325
Other Petroleum & Coal Products Mfg.	32419	13	343	413	56	357	606	515	92
Oil & Gas Field Mach. & Equip. Mfg.	33313	159	936	583	575	8	6,179	5,976	203
Pipelines	486	164	6,890	9,316	635	8,682	3,986	3,303	683
Geophysical Surveying and Mapping	541360	477	158	130	109	20	1,712	1,109	603
Other Oil and Gas-Related Sectors		**823**	**$10,551**	**$13,118**	**$1,739**	**$11,380**	**14,632**	**12,726**	**1,906**
Oil and Gas Cluster - Total		**3,408**	**$31,028**	**$30,413**	**$5,909**	**$24,504**	**103,435**	**38,142**	**65,293**

Notes: NAICS represents the North American Industry Classification System code for each industry sector in the oil and gas cluster.
Source: Bureau of Economic Analysis, Bureau of Labor Statistics, and RegionTrack calculations

Traditional Sectors. The three traditional oil and gas sector activities – drilling, production, and support – accounted for most of the economic activity generated by the state's oil and gas cluster in 2024. About 75% (2,585) of the more than 3,400 business establishments in the cluster operated in the three traditional sectors. These traditional firms accounted for two-thirds ($24.8 billion) of cluster GDP and 86% (88,803) of total cluster employment in 2024.

Ancillary Sectors. Despite the dominant role of the traditional sectors, firms in the five ancillary sectors produced a large share of total cluster activity. As a group, the ancillary sectors included 823 firms that made a direct contribution of $10.6 billion in state GDP, $13.1 billion in household earnings, and 14,600 total jobs in 2024. Pipelines and refineries remain the largest components among the non-traditional sectors of the cluster.

Cluster Share of Statewide Economic Activity

The state's oil and gas cluster continued to produce an outsized share of total statewide economic activity in 2024 relative to both the number of establishments operating and the number of employees supported (*Figure 2*). The cluster also produced far more output and household income per worker than other state sectors.

Firms in the oil and gas cluster represented only 2.8% of all firms statewide but accounted for:

- 4.2% of total statewide employment (both wage and salary and self-employed proprietors)
- 11.8% of state gross domestic product
- 17.5% of household earnings statewide
- 4.5% of all compensation paid to wage and salary workers in the state
- 59% of all self-employed proprietor earnings statewide

Relative to the average across all state industries, the oil and gas cluster produced:

- 3.5 times more GDP per worker ($362,800 vs. $104,550 per worker)
- 2.2 times more compensation per wage and salary worker ($151,500 vs. $70,500 per worker)
- 8.6 times more proprietor income per self-employed proprietor ($413,400 vs. $48,300 per proprietor)

Figure 2. Oil and Gas Cluster Share of State Economic Activity (2024)

Economic Measure	Oil and Gas Cluster	State of Oklahoma	Share/Ratio of State Total
Business Establishments	3,408 firms	123,167 firms	2.8%
Wage & Salary Employment	38,142 employees	1,778,875 employees	2.1%
Proprietors' Employment	65,293 proprietors	696,033 proprietors	9.4%
Total Employment	103,435 total employment	2,474,908 total employment	4.2%
Gross Domestic Product	$31.0 billion	$263.7 billion	11.8%
GDP per Employee	$299,976 per employee	$106,549 per employee	2.8x
Household Earnings	$30.4 billion	$173.9 billion	17.5%
Earnings per Employee	$294,030 per employee	$70,253 per employee	4.2x
Employee Compensation	$5.9 billion	$132.3 billion	4.5%
Compensation per Worker	$154,921 per worker	$74,373 per worker	2.1x
Proprietor Earnings	$24.5 billion	$41.6 billion	59%
Proprietor Earnings per Proprietor	$375,293 per proprietor	$59,724 per proprietor	6.3x

Source: Bureau of Economic Analysis, Bureau of Labor Statistics, and RegionTrack calculations

Composition of the Cluster

Cluster Component Size. Among all eight individual NAICS sectors in the cluster, oil and gas extraction (or production) is the dominant component and accounted for nearly two-thirds ($20.5 billion) of total cluster GDP in 2024. However, the large and growing pipeline sector was the second largest component and produced 22% ($6.9 billion) of cluster GDP. The third largest sector, oil and gas support activities, remained contracted further in 2024 and produced only 8% ($2.5 billion) of total cluster GDP. Refineries, another key ancillary sector, posted strong gains and accounted for more than 7% ($2.2 billion) of total cluster GDP in 2024.

Wage and Salary Employment. Almost two-thirds (24,416) of the 38,140 wage and salary workers in the cluster worked in the three traditional oil and gas sectors in 2024. Among the ancillary sectors, the cluster included 6,000 wage and salary workers in oil and gas field machinery manufacturing, 1,820 in refineries, and 3,300 in the pipeline sector. Firms in the cluster also employed 1,100 wage and salary workers in geophysical surveying and mapping and 600 in other forms of petroleum product manufacturing.

Self-Employed Proprietors. Self-employment remained an important source of employment and household income within the Oklahoma oil and gas cluster in 2024. The high share of proprietors operating in the oil and gas sector is a key point of differentiation between Oklahoma and most other oil and gas producing states. The 65,300 self-employed proprietors in the cluster outnumbered the 38,140 wage and salary workers in the industry by a ratio of 1.7 to one in 2024, up from 1.4 to one in 2023. Total proprietor earnings were more than four-fold the total wage and salary earnings paid by firms in the cluster ($24.5 billion vs. $5.9 billion). Nearly all (97% or 63,400) self-employed proprietors in the cluster were in the traditional drilling, extraction, and support sectors, with 83% (45,170) in the extraction (or production) sector alone. This group includes the many thousands of state residents earning self-employment income from mostly small proprietorships and partnerships involved in oil and gas production, as well as individuals receiving royalties, lease payments, and other financial payouts related to production.

Household Earnings – Traditional vs. Ancillary. Total household earnings were down slightly in both the traditional areas of extraction, drilling, and support ($17.3 billion) and the ancillary sectors ($10.6 billion) in 2024. Proprietors' earnings in the traditional oil and gas sectors reached $13.1 billion versus $11.4 billion earned in the ancillary sectors. Pipelines accounted for most (76%) of the proprietor earnings among the ancillary sectors of the cluster, down slightly from 2024.

Establishment Size. The level of employment at firms in the state's oil and gas cluster ranges from a single employee to more than 1,000 employees. Figure 3 provides a breakdown of private sector oil and gas firms by employment size in the first quarter of 2024 using data on the Oklahoma mining sector (NAICS 21).[1] The dataset excludes government workers and provides industry coverage roughly equivalent to the three traditional sectors of the oil and gas cluster. Wage and salary employees are captured but self-employed proprietors are excluded.

Figure 3. Private Sector Establishments in the Mining Sector by Employment Size (2025Q1)

Establishment Size	Establish-ments	Share of Total	Employment	Share of Total	Total Annual Compensation	Share of Total	Average Annual Compensation
<5 employees	1,812	66.6%	2,388	8.4%	$195,579,440	4.2%	$81,897
5 to 9 employees	358	13.2%	2,495	8.7%	223,276,159	4.8%	89,475
10 to 19 employees	226	8.3%	3,041	10.7%	287,976,964	6.2%	94,688
20 to 49 employees	216	8.0%	6,476	22.7%	651,274,700	14.0%	100,567
50 to 99 employees	70	2.6%	4,490	15.8%	579,508,688	12.5%	129,067
100 to 249 employees	32	1.2%	4,712	16.5%	776,584,116	16.7%	164,798
250+ employees	8	0.3%	4,901	17.2%	1,936,906,770	41.6%	395,228
All establishments	**2,722**	**100.0%**	**28,504**	**100.0%**	**$4,651,131,948**	**100.0%**	**$163,175**

Notes: Includes only NAICS 21 Mining and does not capture the ancillary components of the oil and gas cluster
Source: Bureau of Labor Statistics and RegionTrack calculations

Most traditional oil and gas firms in the state were relatively small employers in 2024 with two-thirds (67%, 1,812) having fewer than five employees and approximately 80% with fewer than 10. However, the 2,170 small firms with less than 10 employees comprised only 17.1% of total wage and salary employment and 9.0% of total compensation in mining. These smaller firms paid average compensation of $81,897 at firms with fewer than 5 employees and $89,475 at those with 5 to 9 employees, with both groups averaging $85,780 in the period.

An additional 442 (16.3%) relatively small mining sector firms had 10 to 49 employees. These firms accounted for one-third of total mining sector jobs and 20% of total payroll. Average compensation reached $94,700 at firms with 10 to 19 employees and $100,600 at firms with 20 to 49 employees.

The combined group of firms with fewer than 50 employees (2,610 firms) employed 50% of mining sector workers but paid only 29% of total payroll. These firms paid average annual compensation well above the $70,500 overall state wage per employee in the first quarter of 2024. Average compensation across all firms with fewer than 50 employees reached $94,310 in 2024, 27% above the overall state average compensation of $74,400.

A middle layer of the industry measured by employment and payroll consists of about 100 firms with 50 to 249 employees each. These firms comprised only 3.8% of firms in the sector but accounted for 32% of employment and 29% of total payroll. Average compensation among these firms reached $147,400 per worker in the first quarter of 2024, roughly double the overall state average of $74,400.

There were an additional eight larger firms in the state's oil and gas sector with 250 or more employees in 2024. These eight firms represented only 0.3% of total firms in the sector but provided an outsized share of employment (17%) and compensation (42%). These large firms paid far higher wages on average than smaller firms in the sector, averaging $395,200 in the period, nearly triple the state average. In contrast to the smaller firms, these eight large firms employ significant numbers of executives and high-skill technical workers.

Across the full private mining sector, average compensation reached $163,175 in 2024, up 8.4% from $150,500 in 2023. The high average wages paid to wage and salary workers at the state's oil and gas firms underlies much of the economic impact exerted by the industry on the state economy. It also reflects the high productivity of the industry as measured by GDP produced per worker.

Trends in the Cluster

The output from Oklahoma's oil and gas cluster remained under pressure in 2024 as energy prices weakened, drilling and exploration stabilized at low levels, and production volumes for crude oil and natural gas remained subdued in the post-pandemic period. The size of the state's oil and gas workforce remained relatively stable but at roughly half the peak levels seen a decade ago. Among the ancillary sectors, pipeline companies slowed from a recent wave of construction activity but remained large contributors to state GDP and household earnings. The remaining ancillary sectors added stability and some growth. Despite soft production value and output, the industry's efforts to increase profitability are reflected in continued high levels of proprietor income earned in the cluster.

Industry Growth. Figures 4 and 5 provide a 25-year historical profile of economic activity in the cluster through 2024. GDP produced by firms in the cluster fell about 10% to $31.0 billion in 2024 (*Figure 4a*). Cluster GDP in 2024 remained roughly 25% below the recent peak of $41.4 billion in 2022 following a temporary spike in energy prices. Despite the pullback, the 2024 level of cluster GDP remains near recent trend averages. Excluding the one-time pandemic effects in 2020, the state oil and gas cluster produced an average of $33.6 billion in state GDP annually in the decade from 2014 to 2024.

The amount of earnings paid to households remains the bright spot for an industry that has pursued greater financial discipline in recent years. Improved financial performance is reflected in higher earnings paid to both workers and proprietors in the cluster. Total household earnings received from firms operating in the cluster reached $30.4 billion in 2024, up slightly from about $29 billion in both 2022 and 2023 (*Figure 4b*). The levels of household earnings since 2022 are elevated well above pre-pandemic levels. The cluster produced an average of only $20.8 billion across the past decade, excluding the pandemic year of 2020. Compensation paid to employees reached approximately $6 billion for the second consecutive year but remains below the record $8.4 billion in compensation paid in 2014 when employment levels were roughly double current counts.

In 2024, total proprietor earnings in the cluster reached $24.5 billion, a record high and more than double the average proprietor earnings posted in the pre-pandemic period from 2014 to 2019. Total employee compensation of $5.9 billion comprised the remaining 20% of the $30.4 billion in total household earnings from the cluster in 2024. The core component of household income continues to shift away from employee compensation and toward proprietor earnings over time. The trend toward high proprietor income has been in place since the reemergence of the industry in 2003. Household earnings were approximately 80% employee compensation in 2004 but are now comprised of roughly 80% proprietor income since 2022. The proprietor share shifted upward to more than 50% of total household earnings between 2004 and 2014. The proprietor share reached an average share of 80% in the 2022 to 2024 period.

Total employment in the oil and gas cluster posted a small gain for a third consecutive year in 2024. However, the gains remain confined to self-employed proprietors operating in the cluster. The number of wage and salary workers declined slightly to 38,140 in 2024, leaving wage and salary job levels essentially unchanged since 2020 (*Figure 4c)*. The cluster added approximately 20,000 proprietors between 2020 and 2024, with almost 10,000 added in 2024. The total employment gain of nearly 20,000 since 2020 is almost entirely due to proprietor gains.

Total hiring of 103,435 wage and salary workers and self-employed proprietors in 2024 is up about 9% from 2023 and represents the highest total employment level in the cluster since 2019. Nevertheless, current hiring remains about 45,000 (30%) below the record high of 151,820 set in 2013.

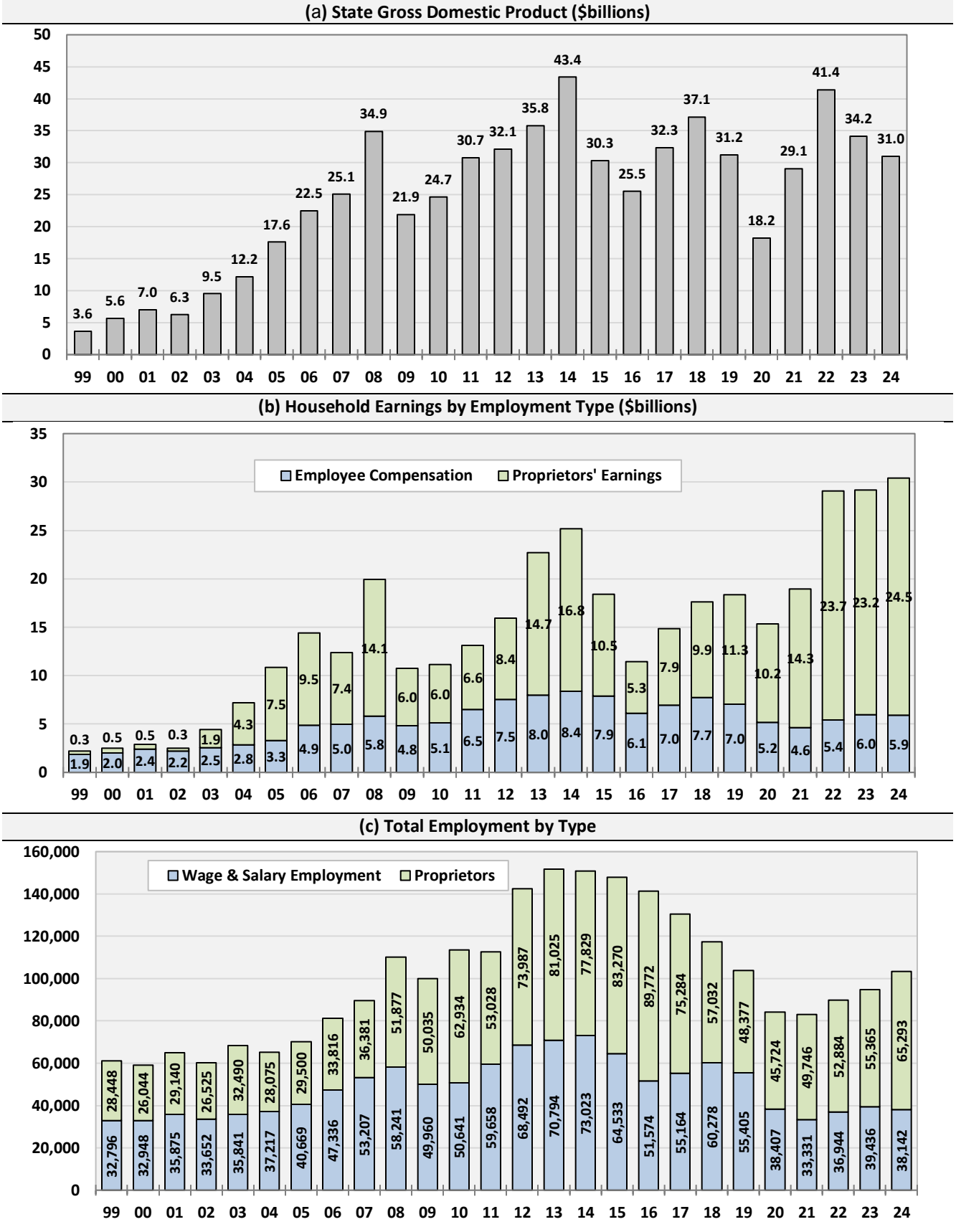
Traditional vs. Ancillary Sectors. The ancillary components of the cluster posted a relatively strong performance in 2024 (*Figure 5a*). The ancillary sectors posted a 3% expansion in GDP versus a 14% decline for the traditional sectors.

Household earnings were also far stronger in 2024 in the ancillary sectors, posting a 13% gain versus a 2% decline in the traditional sectors (*Figures 5b-d*). Much of the strength in household income in the 2022 to 2024 period is traced to the ancillary sectors – primarily the pipeline sector. Proprietor earnings in the traditional sectors declined slightly in 2024 versus a 16% gain in the ancillary sectors. Surprisingly, proprietor income in the ancillary sectors in 2024 ($11.4 billion) nearly matched the proprietor income generated within the traditional

sectors ($13.1 billion) of the cluster. Pipelines generated three-fourths ($8.7 billion) of the proprietor income in the ancillary sectors in 2024.

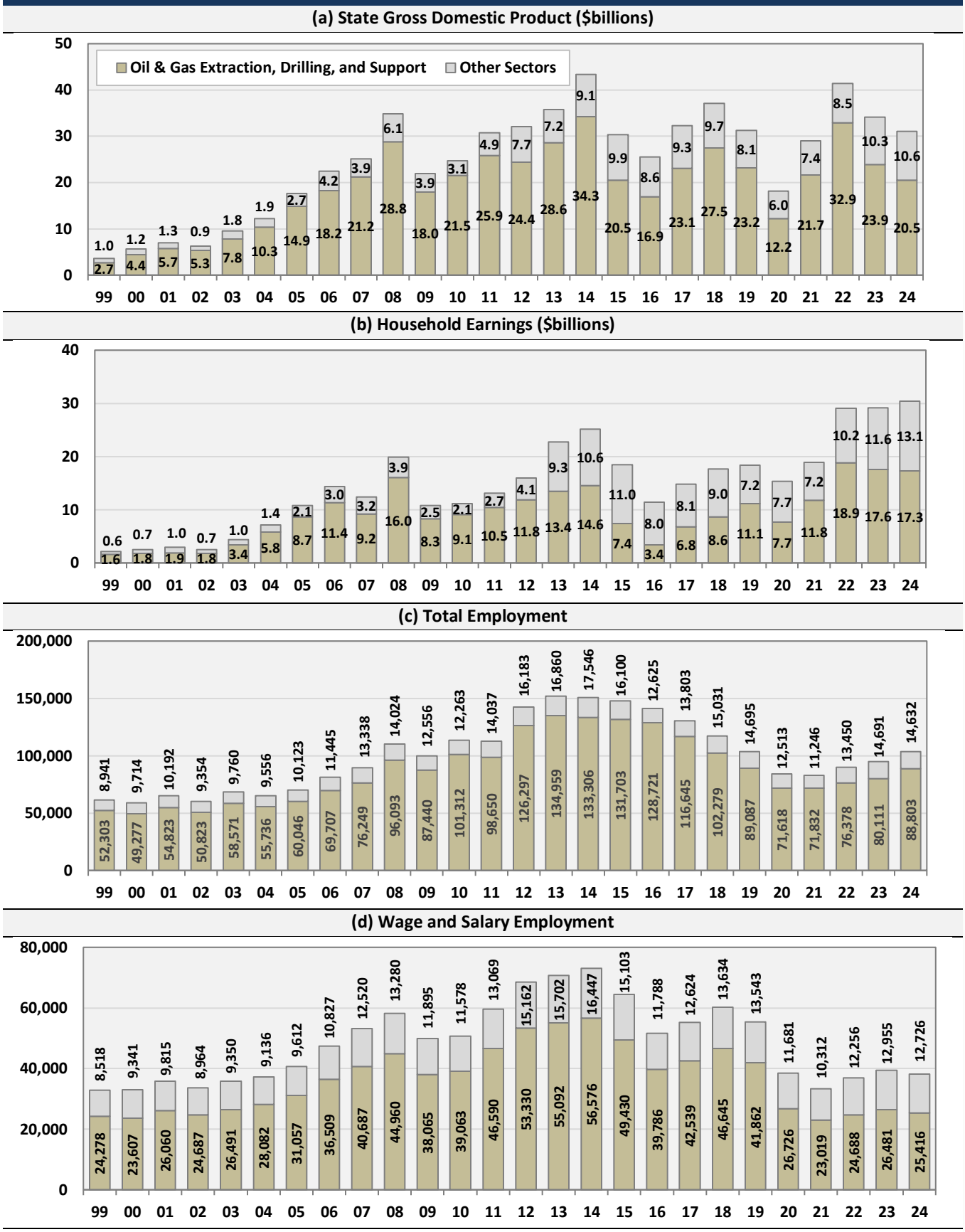
Employment trends remain similarly weak in both the traditional and ancillary sectors with proprietor gains offsetting losses in wage and salary jobs. The traditional sectors posted a modest total job gain in 2024 that was traced to an 18% gain in the number of proprietors. The ancillary sectors posted a strong but smaller 10% gain in proprietors in 2024. The number of wage and salary jobs dropped slightly in both the traditional (-4%) and ancillary (-2%) sectors in 2024.

Figure 4. Historical Profile of Oklahoma's Oil and Gas Cluster



Source: Bureau of Economic Analysis and RegionTrack calculations

Figure 5. Traditional vs. Ancillary Components of Oil and Gas Cluster



Source: Bureau of Economic Analysis and RegionTrack calculations

III. Oklahoma Oil and Gas Production

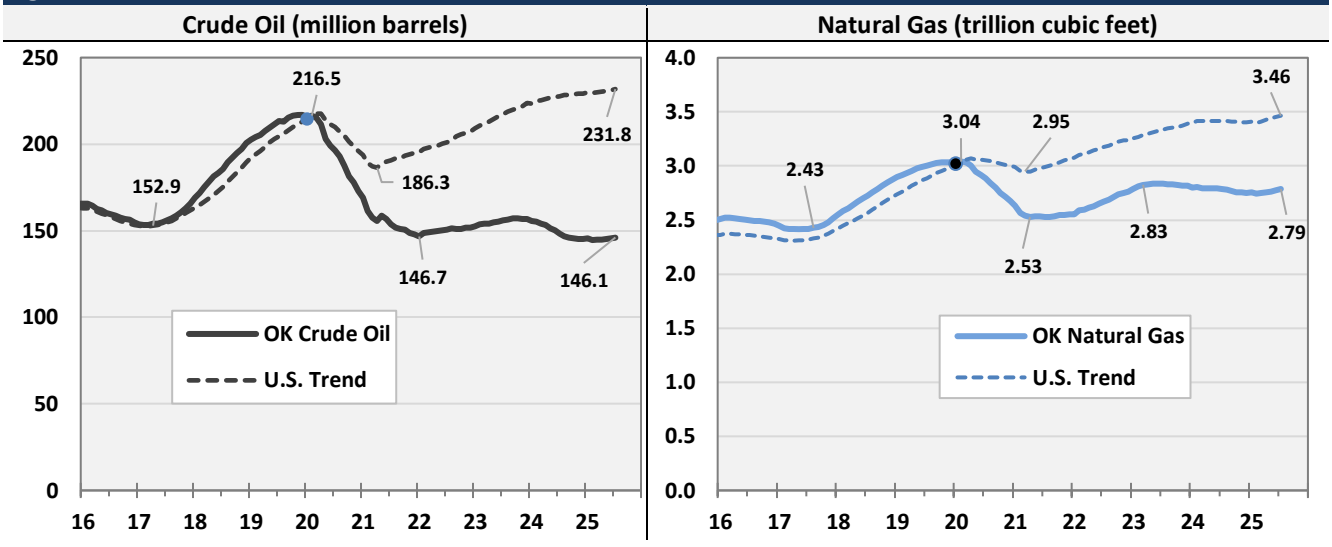
Post-Pandemic Production Trends

State production of crude oil and natural gas remains subdued in the post-pandemic period (*Figure 6*). State oil production totaled 146.1 million barrels in the 12 months ended July 2025, about one-third below the pre-pandemic record level of 217 million barrels. State production has tracked within a narrow band around 150 million barrels since late 2021 and recovered none of the oil production lost in the aftermath of the pandemic.

State natural gas production totaled 2.79 trillion cubic feet (Tcf) in the 12 months ended July 2025, down about 8% from a pre-pandemic record high of 3.04 Tcf in early 2020. The state has recovered nearly half of the 17% total decline in gas production in the second half of 2020 and first half of 2021.

State production of oil and gas has also underperformed relative to national output. Relative to the nation following the onset of the pandemic, state production entered a decline slightly earlier, experienced far larger losses, bottomed out later than the nation, and posted a weaker recovery. For comparison, U.S. crude oil production declined only 14% nationally following the pandemic, less than half the 32% decline in Oklahoma. U.S. crude production entered a steady uptrend in the first half of 2021 and is currently 25% above the post-pandemic bottom. U.S. natural gas production declined only 3.9% during a brief slowdown, less than one-fourth the size of the 17% contraction in Oklahoma. U.S. natural gas production is now 17% above its post-pandemic bottom.

Figure 6. Oklahoma vs. U.S. Annual Crude Oil and Natural Gas Production



Notes: Production is the sum of monthly production in the prior 12 months. U.S. production is indexed to state production in February 2020.
Source: U.S. Energy Information Administration

Both oil and gas production in the state showed a slight downward bias throughout most of 2024. Oil production remained flat during the first two quarters of 2025 while natural gas suggested the first upward bias to production since early 2023. In contrast, U.S. production of both oil and natural gas showed only softening growth in 2024 while both remained in an uptrend in the first half of 2025.

Measured relative to pre-pandemic production levels, Oklahoma has opened up a production gap relative to the nation of approximately 85 million barrels of oil and 670 billion cubic feet (Bcf) of natural gas.

EIA U.S. Oil and Gas Production Outlook. Current EIA forecasts suggest U.S. crude oil production will rise only slowly through the fourth quarter of 2025 before declining through the first three quarters of 2026.[2] EIA's annual estimates call for unchanged oil production (13.5 million barrels per day) for calendar year 2026 relative to 2025. The production projections reflect EIA's call for softening oil prices in 2026, falling to an average of $48.50 in 2026 versus $65 for all of 2025.

EIA forecasts for U.S. natural gas production suggest output of 117.6 Bcf per day for all of 2025, rising less than 1% in 2026 to 118.1 Bcf per day. EIA production increase is accompanied by strengthening of natural gas prices. Natural gas prices are projected to average $3.55 for all of 2025 before rising to $4.09 in 2026, a 15% increase in the period.

Long-Run Production Trends

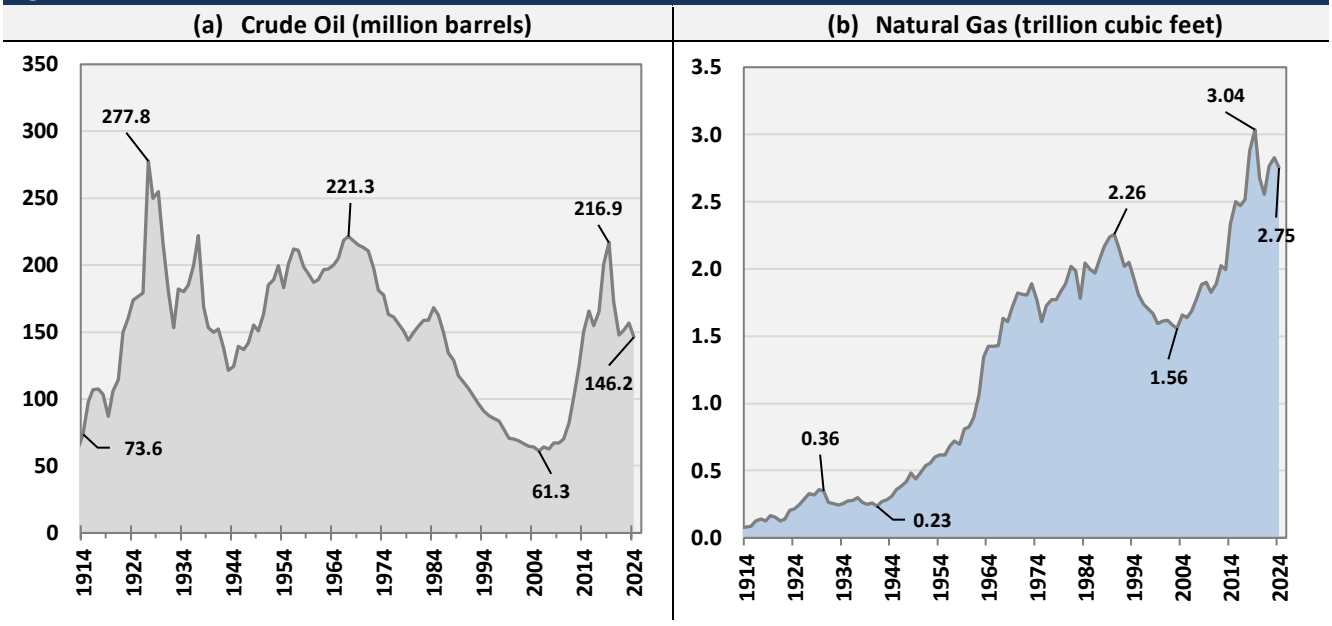
Despite pulling back from a multi-decade high in oil production and a record in natural gas production set in 2020, both oil and gas output in Oklahoma are believed to remain in a significant long-run expansion phase (*Figure 7*). The state has significant numbers of drilling opportunities and proved reserves can support considerable additional long-run development.

Total state crude oil output of 146.2 million barrels in 2024 remains more than double the 61.3 million barrels produced at the recent intermediate-term low in 2005. However, this leaves state oil production in 2024 almost exactly half the all-time high of 278 million barrels produced in 1927 during the early boom days of the industry.

Natural gas production of 2.75 Tcf in 2024 is 10% below the all-time high of 3.04 Tcf set in 2019 but is nearly double the level from the recent intermediate-term low in 2003. State natural gas output remains more than 20% above the prior intermediate term high of 2.26 Tcf set in 1990. State natural gas production also remains 76% above the recent bottom of 1.56 Tcf in 2003 when the industry first reemerged in the current cycle.

Overall, state oil and gas production has pulled off recent highs but remains near record production levels when viewed over an extended time frame.

Figure 7. Oklahoma Historical Production of Crude Oil and Natural Gas



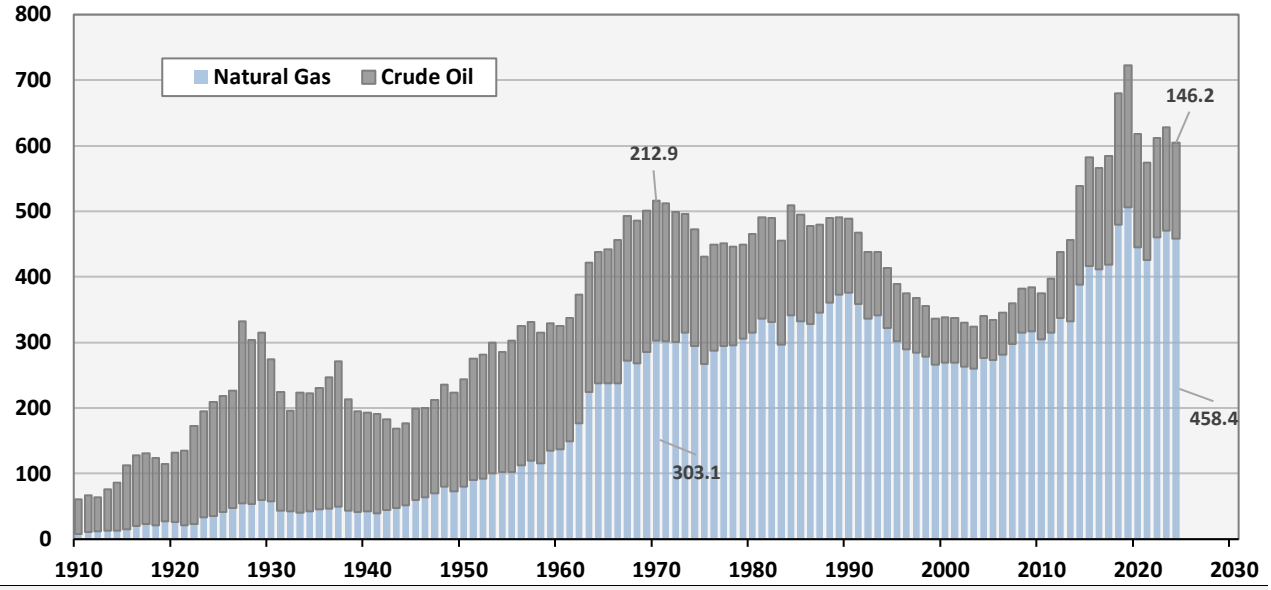
Source: U.S. Energy Information Administration

Total BOE Production. Based on a physical barrels-of-oil-equivalent (BOE) basis (where 1 barrel of oil equals 6 Mcf of natural gas on a btu equivalent basis), total production of oil and natural gas in Oklahoma reached 605 million BOE in 2024, down 4% from 628 million BOE in 2023 (*Figure 8a*). Current BOE production remains roughly double the 2003 low as the industry began reemerging.

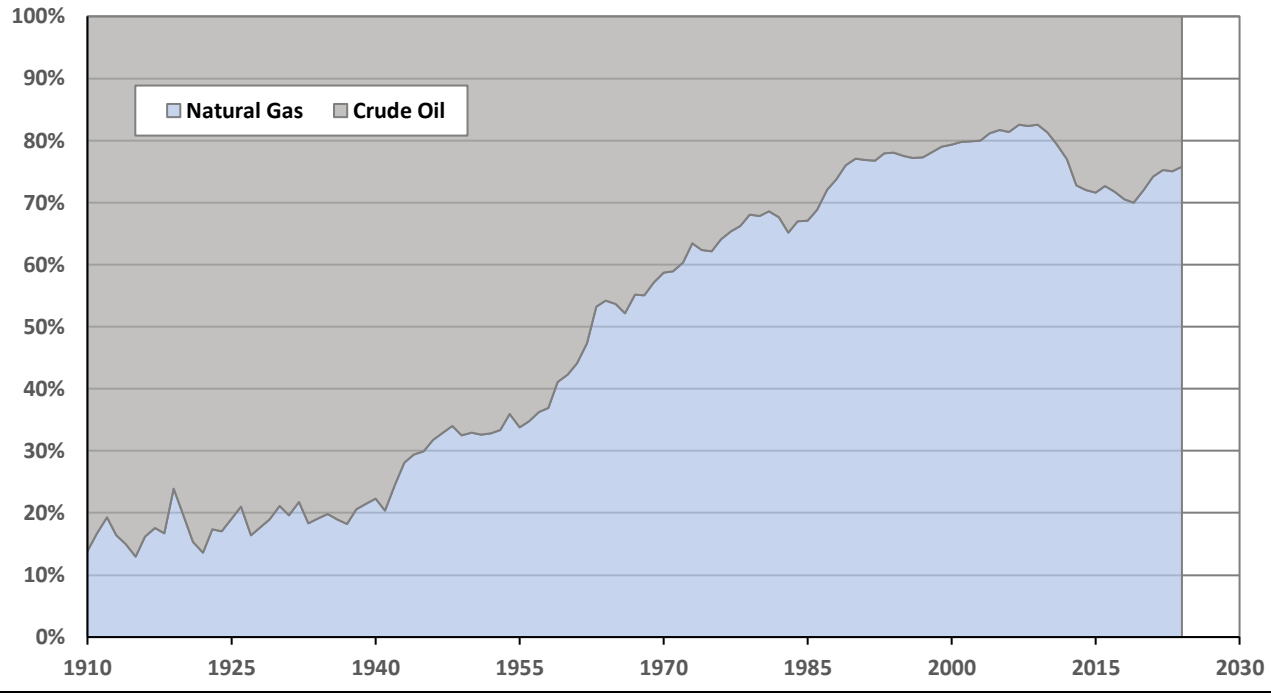
BOE production remains largely driven by natural gas output. The natural gas share of BOE output has steadily increased over several decades from 20% in the 1930s to a peak of 80% in the 2000s. Natural gas accounted for 76% (458.4 million BOE) of total BOE volume in 2024 (*Figure 8b*). The 146.2 million barrels of crude oil produced statewide comprised the remaining 24%. The BOE mix of production for the past 10 years is now 72.9% natural gas and 27.1% crude oil.

Figure 8. Oklahoma Total BOE Production of Crude Oil and Natural Gas

(a) Total BOE Production (million barrels-of-oil-equivalent)



(b) Share of Total BOE Production (%)



Notes: Natural gas is converted to barrels of oil equivalent using 6 mcf of natural gas per barrel of oil.
Source: U.S. Energy Information Administration and RegionTrack calculations

Figure 9. Oklahoma Crude Oil and Natural Gas Production by County

County	Crude Oil (Bbl)			Natural Gas (Mcf)			BOE Production (BOE)			Producing Well Count			Average BOE	
	Production	Share of	Rank	Production	Share of	Rank	Production	Share of	Rank	Wells	Share of	Rank	per Well	Rank
Adair	0	0.0%	67	0	0.0%	66	0	0.0%	72	0	0.0%	72	0	72
Alfalfa	1,737,240	1.2%	19	42,017,970	1.6%	16	8,740,235	1.5%	17	1,137	2.8%	14	7,690	14
Atoka	9,397	0.0%	57	12,189,911	0.5%	28	2,041,049	0.4%	31	110	0.3%	47	18,611	47
Beaver	690,468	0.5%	28	12,784,938	0.5%	27	2,821,291	0.5%	29	1,366	3.3%	9	2,065	9
Beckham	382,004	0.3%	34	22,259,900	0.9%	22	4,091,987	0.7%	23	614	1.5%	29	6,660	29
Blaine	6,952,780	4.7%	9	228,320,001	8.8%	3	45,006,114	7.8%	3	1,187	2.9%	11	37,913	11
Bryan	41,205	0.0%	54	1,202,338	0.0%	48	241,595	0.0%	53	38	0.1%	57	6,428	57
Caddo	1,873,116	1.3%	18	41,253,233	1.6%	17	8,748,655	1.5%	16	859	2.1%	22	10,187	22
Canadian	19,404,300	13.3%	1	416,392,036	16.0%	1	88,802,973	15.3%	1	2,064	5.0%	2	43,032	2
Carter	9,517,120	6.5%	5	62,346,669	2.4%	12	19,908,232	3.4%	8	934	2.3%	16	21,326	16
Cherokee	0	0.0%	67	0	0.0%	66	0	0.0%	72	0	0.0%	72	0	72
Choctaw	0	0.0%	67	0	0.0%	66	0	0.0%	72	0	0.0%	72	0	72
Cimarron	91,034	0.1%	47	246,608	0.0%	56	132,135	0.0%	59	46	0.1%	56	2,888	56
Cleveland	549,022	0.4%	31	459,266	0.0%	52	625,566	0.1%	49	101	0.2%	49	6,173	49
Coal	90,161	0.1%	48	60,981,203	2.3%	13	10,253,695	1.8%	15	635	1.6%	28	16,156	28
Comanche	45,240	0.0%	53	417,674	0.0%	53	114,852	0.0%	60	51	0.1%	55	2,248	55
Cotton	50,900	0.0%	51	0	0.0%	66	50,900	0.0%	63	28	0.1%	61	1,802	61
Craig	745	0.0%	64	14,466	0.0%	63	3,156	0.0%	69	3	0.0%	69	1,222	69
Creek	1,435,548	1.0%	21	388,553	0.0%	54	1,500,307	0.3%	38	527	1.3%	33	2,849	33
Custer	2,082,076	1.4%	15	98,715,304	3.8%	8	18,534,627	3.2%	10	907	2.2%	19	20,429	19
Delaware	0	0.0%	67	0	0.0%	66	0	0.0%	72	0	0.0%	72	0	72
Dewey	2,728,327	1.9%	14	54,022,874	2.1%	14	11,732,139	2.0%	14	871	2.1%	21	13,463	21
Ellis	8,235,444	5.6%	6	66,201,668	2.5%	10	19,269,055	3.3%	9	1,150	2.8%	13	16,759	13
Garfield	876,474	0.6%	25	14,530,439	0.6%	24	3,298,214	0.6%	26	921	2.3%	17	3,580	17
Garvin	8,223,803	5.6%	7	125,774,827	4.8%	7	29,186,274	5.0%	6	1,177	2.9%	12	24,790	12
Grady	19,135,089	13.1%	2	414,477,990	16.0%	2	88,214,754	15.2%	2	1,988	4.9%	3	44,377	3
Grant	314,759	0.2%	37	3,952,909	0.2%	39	973,577	0.2%	44	369	0.9%	35	2,637	35
Greer	597	0.0%	65	21,920	0.0%	61	4,250	0.0%	68	7	0.0%	66	607	66
Harmon	2,039	0.0%	63	0	0.0%	66	2,039	0.0%	71	1	0.0%	71	2,224	71
Harper	86,664	0.1%	49	7,164,159	0.3%	34	1,280,691	0.2%	39	594	1.5%	31	2,155	31
Haskell	0	0.0%	67	7,504,384	0.3%	33	1,250,731	0.2%	40	681	1.7%	27	1,838	27
Hughes	271,030	0.2%	40	77,443,303	3.0%	9	13,178,247	2.3%	13	879	2.1%	20	14,994	20
Jackson	39,087	0.0%	55	0	0.0%	66	39,087	0.0%	64	12	0.0%	65	3,399	65
Jefferson	139,334	0.1%	44	1,568	0.0%	65	139,595	0.0%	56	35	0.1%	58	3,960	58
Johnston	790,607	0.5%	27	5,629,411	0.2%	37	1,728,842	0.3%	37	80	0.2%	53	21,499	53
Kay	451,576	0.3%	32	1,440,924	0.1%	46	691,730	0.1%	47	301	0.7%	40	2,297	40
Kingfisher	14,737,641	10.1%	3	170,912,595	6.6%	4	43,223,074	7.5%	4	2,159	5.3%	1	20,017	1
Kiowa	8,042	0.0%	58	753,178	0.0%	50	133,572	0.0%	58	34	0.1%	60	3,909	60
Latimer	0	0.0%	67	32,201,247	1.2%	20	5,366,875	0.9%	20	995	2.4%	15	5,392	15
Le Flore	0	0.0%	67	11,007,175	0.4%	31	1,834,529	0.3%	35	798	2.0%	24	2,298	24
Lincoln	382,484	0.3%	33	8,535,484	0.3%	32	1,805,065	0.3%	36	388	0.9%	34	4,656	34
Logan	908,848	0.6%	24	14,020,655	0.5%	26	3,245,624	0.6%	27	602	1.5%	30	5,391	30

Figure 9. (Cont.) Oklahoma Crude Oil and Natural Gas Production by County

County	Crude Oil (Bbl)			Natural Gas (Mcf)			BOE Production (BOE)			Producing Well Count			Average BOE	
	Production	Share of	Rank	Production	Share of	Rank	Production	Share of	Rank	Wells	Share of	Rank	per Well	Rank
Love	3,229,175	2.2%	11	11,874,608	0.5%	29	5,208,276	0.9%	22	163	0.4%	45	32,002	45
Major	2,863,271	2.0%	12	32,961,595	1.3%	19	8,356,870	1.4%	18	1,481	3.6%	7	5,643	7
Marshall	347,659	0.2%	36	14,235,729	0.5%	25	2,720,281	0.5%	30	296	0.7%	41	9,206	41
Mayes	2,966	0.0%	61	0	0.0%	66	2,966	0.0%	70	3	0.0%	69	1,148	69
McClain	7,363,327	5.0%	8	48,440,210	1.9%	15	15,436,695	2.7%	11	766	1.9%	25	20,163	25
McCurtain	0	0.0%	67	0	0.0%	66	0	0.0%	72	0	0.0%	72	0	72
McIntosh	160	0.0%	66	5,913,610	0.2%	36	985,762	0.2%	42	214	0.5%	42	4,614	42
Murray	373,374	0.3%	35	1,535,616	0.1%	45	629,310	0.1%	48	20	0.0%	64	31,335	64
Muskogee	29,358	0.0%	56	44,864	0.0%	60	36,835	0.0%	65	35	0.1%	59	1,052	59
Noble	606,791	0.4%	29	2,266,279	0.1%	42	984,504	0.2%	43	313	0.8%	38	3,142	38
Nowata	48,819	0.0%	52	215,292	0.0%	57	84,701	0.0%	61	80	0.2%	54	1,060	54
Okfuskee	251,001	0.2%	42	3,769,159	0.1%	40	879,194	0.2%	46	181	0.4%	44	4,853	44
Oklahoma	1,920,673	1.3%	17	7,033,218	0.3%	35	3,092,876	0.5%	28	335	0.8%	36	9,228	36
Okmulgee	189,623	0.1%	43	293,283	0.0%	55	238,504	0.0%	54	153	0.4%	46	1,557	46
Osage	3,582,545	2.4%	10	1,866,596	0.1%	43	3,893,644	0.7%	24	812	2.0%	23	4,798	23
Ottawa	0	0.0%	67	0	0.0%	66	0	0.0%	72	0	0.0%	72	0	72
Pawnee	294,407	0.2%	39	206,962	0.0%	58	328,901	0.1%	50	102	0.3%	48	3,214	48
Payne	590,876	0.4%	30	3,627,825	0.1%	41	1,195,514	0.2%	41	328	0.8%	37	3,640	37
Pittsburg	2,060	0.0%	62	147,402,812	5.7%	5	24,569,195	4.2%	7	1,881	4.6%	5	13,065	5
Pontotoc	1,700,243	1.2%	20	1,283,733	0.0%	47	1,914,199	0.3%	34	204	0.5%	43	9,403	43
Pottawatomie	835,943	0.6%	26	469,688	0.0%	51	914,224	0.2%	45	304	0.7%	39	3,005	39
Pushmataha	0	0.0%	67	1,569,459	0.1%	44	261,577	0.0%	52	25	0.1%	62	10,359	62
Roger Mills	2,814,374	1.9%	13	62,655,192	2.4%	11	13,256,906	2.3%	12	1,893	4.6%	4	7,003	4
Rogers	4,989	0.0%	60	5,045	0.0%	64	5,830	0.0%	67	6	0.0%	67	1,029	67
Seminole	1,212,674	0.8%	22	4,255,599	0.2%	38	1,921,941	0.3%	33	567	1.4%	32	3,390	32
Sequoyah	0	0.0%	67	855,132	0.0%	49	142,522	0.0%	55	89	0.2%	51	1,609	51
Stephens	11,868,560	8.1%	4	137,439,340	5.3%	6	34,775,117	6.0%	5	1,189	2.9%	10	29,237	10
Texas	1,043,587	0.7%	23	15,899,642	0.6%	23	3,693,527	0.6%	25	1,527	3.7%	6	2,419	6
Tillman	69,472	0.0%	50	0	0.0%	66	69,472	0.0%	62	21	0.1%	63	3,295	63
Tulsa	260,423	0.2%	41	21,555	0.0%	62	264,016	0.0%	51	96	0.2%	50	2,741	50
Wagoner	5,960	0.0%	59	0	0.0%	66	5,960	0.0%	66	4	0.0%	68	1,703	68
Washington	128,275	0.1%	45	58,840	0.0%	59	138,082	0.0%	57	88	0.2%	52	1,571	52
Washita	306,780	0.2%	38	30,038,427	1.2%	21	5,313,185	0.9%	21	734	1.8%	26	7,235	26
Woods	2,053,247	1.4%	16	33,468,770	1.3%	18	7,631,375	1.3%	19	1,424	3.5%	8	5,360	8
Woodward	116,484	0.1%	46	11,218,288	0.4%	30	1,986,199	0.3%	32	912	2.2%	18	2,178	18
Statewide	**146,401,297**	**100.0%**		**2,596,513,148**	**100.0%**		**579,153,488**	**100.0%**		**40,893**	**100.0%**		**14,163**	

Notes: Production covers the 12 months ending June 2025

Source: S&P Global and RegionTrack calculations

Distribution of County-Level Production

The state continues to see production across nearly all areas of the state, with 71 of the state's 77 counties producing some oil or natural gas in the 12 months ended June 2025. Figure 9 summarizes oil and gas production at the county level in the period, including oil and gas production levels, producing well counts, and average well output.

The production in most counties is from legacy wells drilled many years ago. However, production is increasingly concentrated in counties comprising the most prolific producing regions of the state as drilling concentrates in these areas. Two counties – Canadian (15.3%) and Grady (15.2%) – each produced more than 15% of total state BOE production of oil and natural gas and more than 30% combined.

Canadian County ranks 1st among the state's 77 counties by ranking 1st in natural gas production, 1st in oil production, 1st in total BOE production, 2nd in number of producing wells, and 2nd in average BOE output per well. Grady County ranks 2nd in oil production, natural gas production, and total BOE production as well as 3rd in number of producing wells.

Five additional large producing counties – Blaine (7.8%), Kingfisher (7.5%), Stephens (6.0%), Garvin (5.0%), and Pittsburg (4.2%) – form a second tier that produced approximately 4% to 10% of total state BOE output each. Combined, these five counties produced 30.5% of total state BOE output. Along with Canadian and Grady, the top seven counties produced 61% of total state BOE output. Three additional counties – Carter, Custer, and Ellis – each produced more than 3% of total state BOE output, or a combined total of 9.9% of state output. The top ten counties produced 70% of total state output in 2024.

A group of 9 counties produced between 1% and 3% of total state BOE output each – Alfalfa, Caddo, Coal, Dewey, Hughes, Major, McClain, Roger Mills, and Woods. These 9 counties produced a combined 17% of total state output. The top 20 counties produced 87% of total state BOE output.

An additional 51 counties produced less than 1% of total state BOE output each. Combined, the group produced only 13% of total state BOE output. Only six counties – Adair, Cherokee, Choctaw, Delaware, McCurtain, and Ottawa – produced no oil or natural gas in the period. A total of 11 counties produced negligible output of 10,000 BOE or less in the period.

Production Concentration. A small number of very large firms in the state's oil and gas extraction sector continue to produce most of the output (*Figure 10*). Measured by production of oil, the five largest producers contributed 41% of total state output, the top 10 contributed 56%, and the top 25 accounted for almost 75% of total state oil output. Natural gas production is slightly more concentrated, as the top five producers generated 42% of state output, the top 10 produced 60%, and the top 25 produced almost 82% of total state natural gas output.

Measuring the combined production of oil and gas on a barrel-of-oil-equivalent (BOE) basis, the five largest producers accounted for 41% of total state oil and gas output, the top ten produced 58%, and the top 25 produced 78%.

Figure 10. Concentration of Oklahoma Oil and Natural Gas Production

Share of Total Producers	Share of State Oil Production	Share of State Natural Gas Production	Share of State BOE Oil and Gas Production
Top 5	40.6%	42.0%	41.0%
Top 10	56.3%	60.4%	58.0%
Top 25	74.5%	81.6%	78.2%
Top 50	84.0%	91.5%	87.9%
Top 100	89.9%	96.2%	93.7%

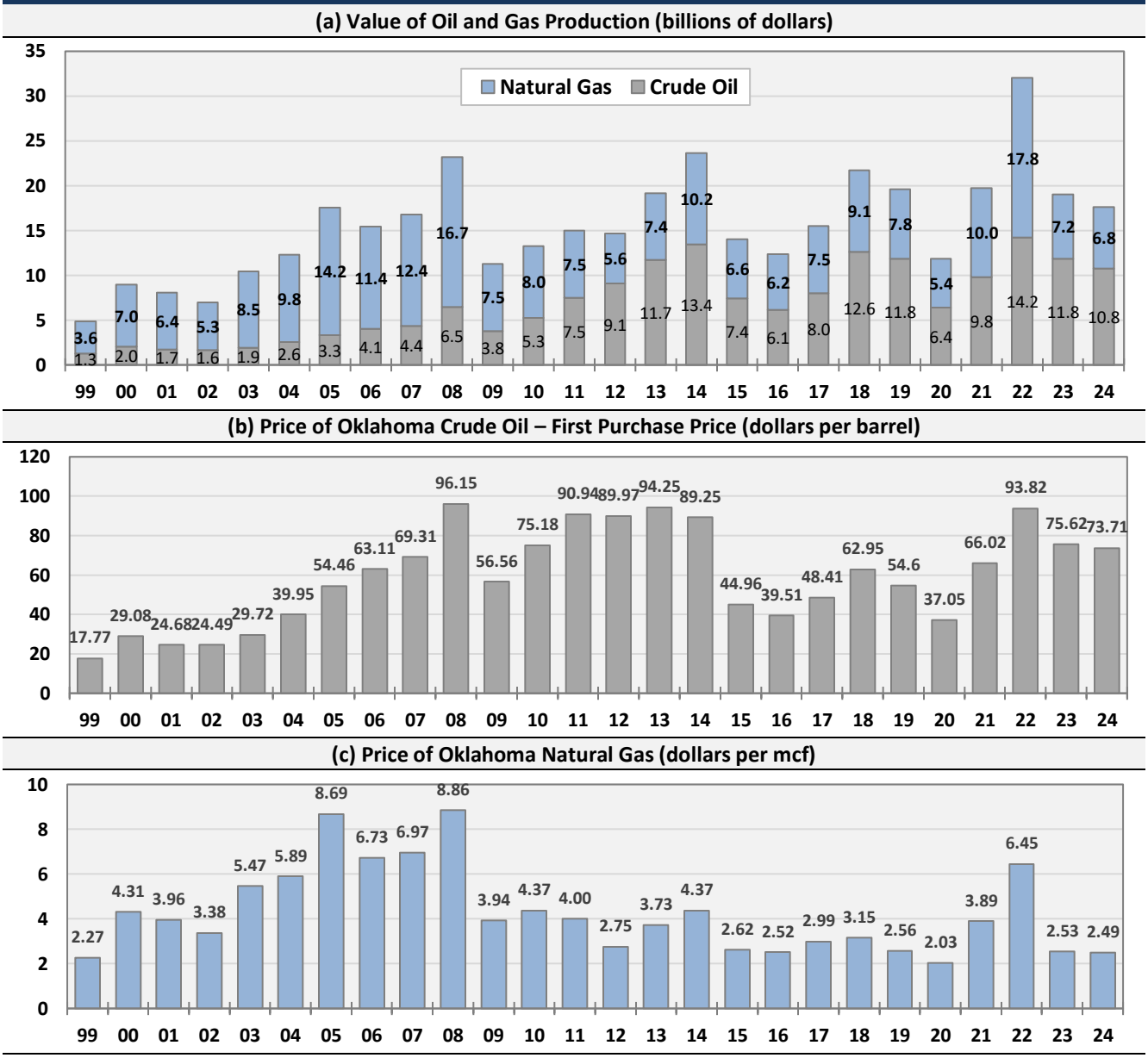
Notes: Production covers the 12 months ending June 2025. BOE is barrel-of-oil equivalent production of both oil and natural gas. Natural gas production is converted to oil production using a ratio of 6 Mcf per barrel.
Source: S&P Global and RegionTrack calculations

Market Value of Oil and Gas Production

Oklahoma's oil and gas producers faced a relatively weak operating environment in 2024 that brought continued weakness in market prices (*Figures 11b and 11c*). The current low-price environment and recent weakness in production volume weighed on the total value of production. The estimated total value of state oil and gas production dropped 7% to $17.6 billion in 2024, down from $19.0 billion in 2023. Total production value has averaged $18.3 billion in the past decade, slightly above the 2024 estimate.

Crude oil value dropped to $10.8 billion in 2024, down 8.5% from $11.8 billion in 2023. Natural gas value similarly dropped to $6.8 billion in 2024, down 5.5% from 2023. The declines in valuation reflect both weak production volume and a slight drop in average prices for both crude oil and natural gas in 2024 relative to 2023. Crude oil valuation averaged $9.9 billion annually the past decade, with the 2024 valuation slightly above this trend. Natural gas valuation averaged $8.4 billion the past decade, with the 2024 valuation well below this trend.

Figure 11. Value of Oklahoma Crude Oil and Natural Gas Production



Notes: All production estimates are calendar year estimates derived from EIA data. Production of crude oil is based on EIA estimates of field production. The price of oil is based on the first purchaser price at the state level. Production of natural gas is based on EIA estimates of marketed production. The price of natural gas is from NGI.
Source: U.S. Energy Information Administration, NGI, Oklahoma Tax Commission, and RegionTrack calculations

State Production Trends and Rankings

Oklahoma remains a key component of the nation's energy infrastructure and a leader among the oil and gas-producing states. The state's output of 146.2 million barrels of crude oil and 2.75 Tcf of natural gas in calendar year 2024 ranked among the leading states (*Figure 12*).

Oklahoma ranked 6th in crude oil production with a 3.3% share of total U.S. output and 6th in natural gas production with a 6.6% share of U.S. output in 2024. The state's share of crude oil and natural gas are down in 2024 from shares of 3.3% and 6.9%, respectively, in 2023.

Measured by barrel-of-oil equivalent production of both crude oil and natural gas, Oklahoma ranked 6th among the producing states in 2024 with a 5.2% share of total U.S. output, down from a 5.4% share in 2023.

Texas and New Mexico are the only two states producing more of both oil and gas than Oklahoma. Oklahoma trailed only Texas, New Mexico, North Dakota, Colorado and Alaska in crude oil production and Texas, Pennsylvania, Louisiana, New Mexico, and West Virginia in natural gas production. Alaska recently regained its lead over Oklahoma in oil production. Louisiana, New Mexico, and West Virginia extended their lead in natural gas production relative to Oklahoma in 2024. West Virginia has gained considerable ground relative to Oklahoma due to rapidly rising natural gas output.

Across the states, Texas has long held what was believed to be an insurmountable lead in the production of both crude oil and natural gas. However, New Mexico continues to expand oil production and is now producing 35% of the volume of Texas. While the gap with New Mexico is still quite large it is closing steadily and represents the only challenge to Texas in the modern producing era. Pennsylvania has made even more progress on the natural gas side, now producing 61% of the gas volume in Texas. Pennsylvania has reached the 80% share of Texas gas volume twice in the past decade.

Figure 12. Leading Crude Oil and Natural Gas-Producing States (2024)

	State	Crude Oil (thou. bbls)	U.S. Share		State	Natural Gas (million cf)	U.S. Share		State	Oil & NG (BOE)	U.S. Share
1	Texas	2,077,133	42.9%	1	Texas	12,098,756	29.2%	1	Texas	4,093,592	34.8%
2	New Mexico	740,402	15.3%	2	Pennsylvania	7,422,303	17.9%	2	New Mexico	1,339,895	11.4%
3	North Dakota	437,008	9.0%	3	Louisiana	3,614,640	8.7%	3	Pennsylvania	1,241,501	10.6%
4	Colorado	170,289	3.5%	4	New Mexico	3,596,959	8.7%	4	Louisiana	639,033	5.4%
5	Alaska	154,174	3.2%	5	West Virginia	3,417,995	8.3%	5	North Dakota	636,021	5.4%
6	**Oklahoma**	**146,167**	**3.0%**	**6**	**Oklahoma**	**2,750,607**	**6.6%**	**6**	**Oklahoma**	**604,602**	**5.2%**
7	California	109,828	2.3%	7	Ohio	2,174,306	5.3%	7	West Virginia	583,317	5.0%
8	Wyoming	106,757	2.2%	8	Colorado	1,854,658	4.5%	8	Colorado	479,399	4.1%
9	Utah	67,106	1.4%	9	North Dakota	1,194,077	2.9%	9	Ohio	398,977	3.4%
10	Ohio	36,593	0.8%	10	Wyoming	951,904	2.3%	10	Wyoming	265,408	2.3%
11	Louisiana	36,593	0.8%	11	Alaska	371,872	0.9%	11	Alaska	216,153	1.8%
12	Kansas	30,359	0.6%	12	Arkansas	355,858	0.9%	12	California	130,017	1.1%
13	Montana	26,655	0.6%	13	Utah	301,527	0.7%	13	Utah	117,361	1.0%
14	West Virginia	13,651	0.3%	14	Kansas	123,577	0.3%	14	Arkansas	63,376	0.5%
15	Mississippi	12,135	0.3%	15	California	121,131	0.3%	15	Kansas	50,955	0.4%
	U.S. Total	**4,843,858**			**U.S. Total**	**41,424,952**			**U.S. Total**	**11,748,017**	

Notes: Natural gas is converted to barrels-of-oil-equivalent (BOE) using a ratio of 6 Mcf of natural gas per barrel of oil.
Source: U.S. Energy Information Administration and RegionTrack calculations

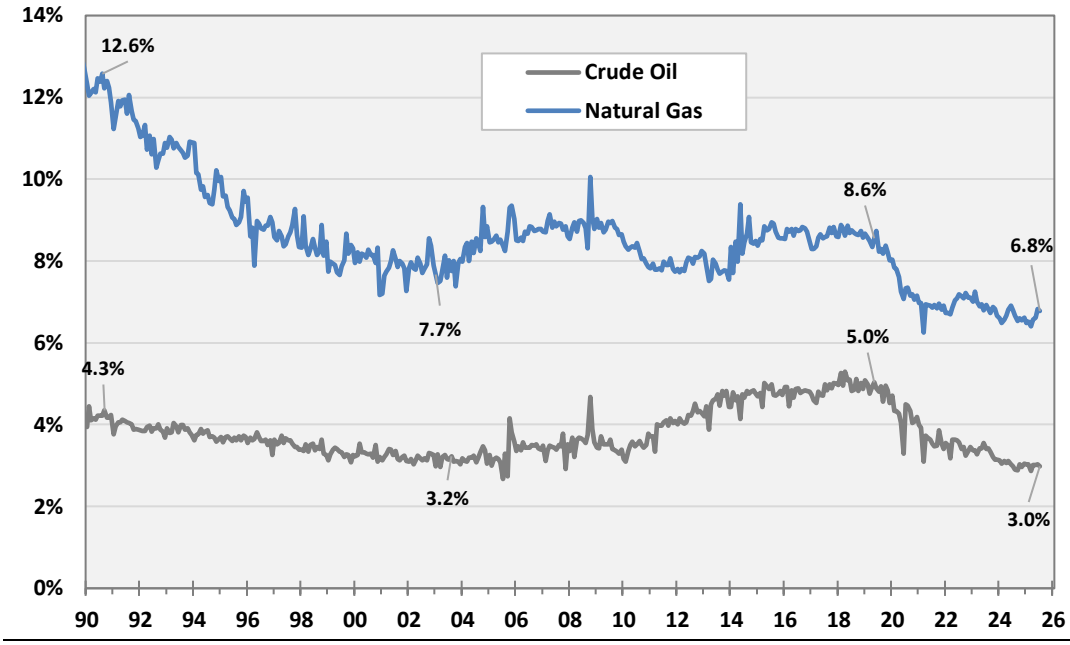
Oklahoma Share of U.S. Production. The relative underperformance of state production versus the nation in the post-pandemic period further pressured the state's share of total U.S. oil and gas production (*Figure 6*). Figure 13 provides an extended view of the state's share of national production of oil and gas from 1990 through July 2025.

The recent share declines for the state are significant for both oil and gas production in the post-pandemic period. Oklahoma's share of crude oil production declined steadily from 5% prior to the onset of the pandemic to 3% currently, a two percentage point decline. The state's natural gas share dropped from 8.6% pre-pandemic to 6.8% currently. This suggests a roughly two percentage point decline in U.S. production share for Oklahoma in both oil and natural gas since the onset of the pandemic.

The current state crude oil share is among the lowest posted in the modern era and is roughly equal to the share in the 2002 to 2005 period that culminated in the state's intermediate term bottom in oil production of 61.3 million barrels in 2005 (*Figure 8a*). The share is also more than a percentage point below the 4.3% oil share in 1990 after the sector fully stabilized in the post-Oil Bust period.

The state's current natural gas share of 6.8% is near a modern era low, matched only by recent months of data in the post-pandemic period. The long-run decline in share is far more significant for natural gas than oil, with the current natural gas share cut by nearly half relative to the 12%+ share in 1990.

Figure 13. Oklahoma Share of U.S. Oil and Gas Production



Notes: Share estimates are calculated using monthly production data through July 2025
Source: U.S. Energy Information Administration and RegionTrack calculations

State Crude Oil Production Trends. Production in nearly every producing state was hard-hit in 2020 during the pandemic. U.S production growth has since fully recovered but production trends since the downturn have varied greatly across the producing states.

Dominant producer Texas managed steady production gains in the post-pandemic period through late 2024, with some visible slowing in the first half of 2025. Texas continues to maintain annual production of more than 2 billion barrels (*Figure 14a*) and has more than fully recovered all its lost oil production during the pandemic.

New Mexico, the 2nd ranked oil producer is adding most of the new oil production in the country since the pandemic ended and is approaching 900 million barrels of annual oil production (*Figure 14b*). New Mexico production remains in a steep uptrend and is on pace to reach 1 billion barrels annually in the next 18-24 months.

North Dakota, the 3rd ranked oil producer, has struggled to rebound from a roughly 25% post-pandemic drop in output (*Figure 14b*). Only about half of North Dakota's lost oil production has been recovered to date.

New Mexico has fared far better in the aftermath of Covid. The state experienced a roughly 25% drop in oil production during the pandemic but quickly returned to a strong uptrend. State production is now about 90% above the pre-pandemic level, the strongest rebound among the oil-producing states and the source of most of the national production gain in the period (*Figure 14c*).

A group of four states – Alaska, California, Colorado, and Oklahoma – experienced declining production in the post-pandemic period. Alaska and California remain mired in a steady long-run downtrend with little relation to the pandemic and have made no progress in halting their long-run declines in oil production in the era of unconventional production (*Figure 14b*). Alaska is now producing only about 133 million barrels annually while California output has dropped to 85 million barrels annually. Oklahoma has now surpassed both states in oil production in data through July in 2025.

Colorado has closely tracked Oklahoma's production trend in recent years but surpassed Oklahoma in 2023 and remains ahead in 2025. However, both Oklahoma and Colorado oil production remained well below pre-pandemic levels. Smaller oil producer Wyoming experienced a more than 30% drop in production post-pandemic. However, the state has since posted a near full recovery in oil production and remains in a modest uptrend.

Oil production in Louisiana has remained in a steady downtrend since 2013. The state is facing a structural decline in oil production much like Alaska and California and continues to fall in the oil production rankings.

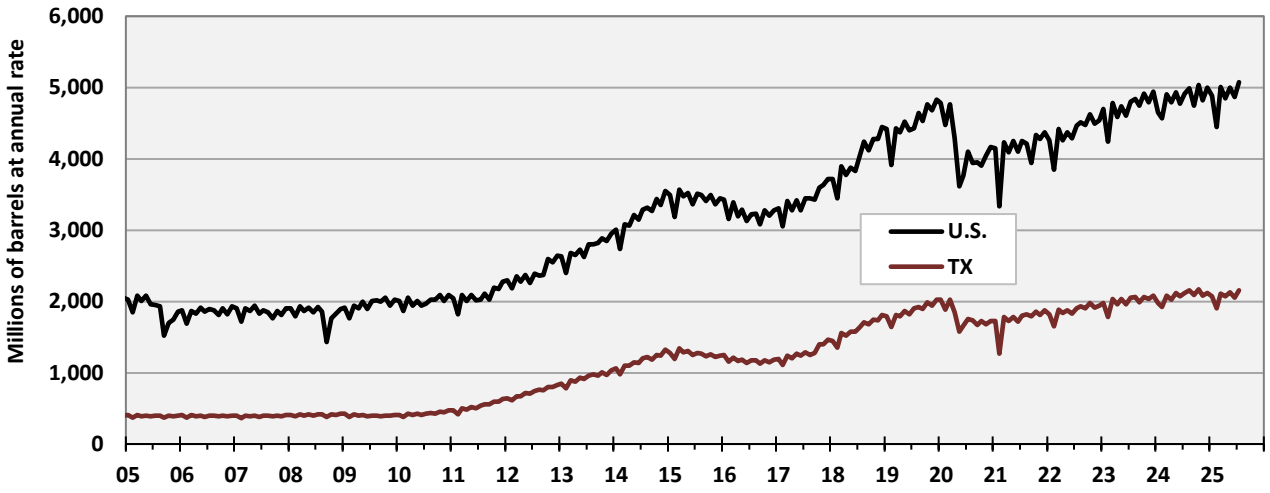
State Natural Gas Production Trends. Along with U.S. natural gas production, many producing states have rebounded fully from the pandemic period and are now experiencing strong production gains. However, some weakness remains in natural gas production in a handful of states through July 2025.

Dominant gas producer Texas quickly recovered and set record production highs beginning in early 2022. Texas gas production remains in a steady uptrend and is currently at record levels. Emerging large gas producer Pennsylvania showed little weakness during the pandemic and has experienced flat production since 2022 (*Figure 15a*). In contrast to relatively strong onshore activity, gas production from the Gulf of Mexico remains in a slow downtrend.

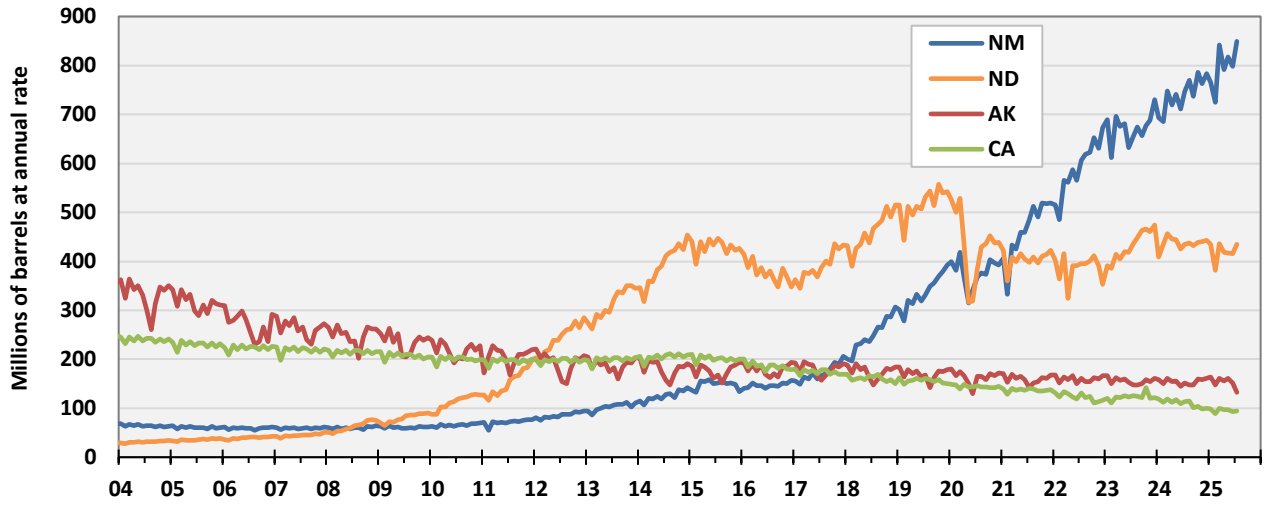
Among a second tier of major gas producers, New Mexico rapidly emerged since the onset of the pandemic as the 3rd largest producing state in 2025 surpassing Louisiana, West Virginia, Oklahoma, Ohio, and Colorado. Louisiana production has been volatile since the pandemic, with very rapid growth from 2021 to 2023 only to give up most of the production gains through 2024. Louisiana gas production has since rebound in the first half of 2025 but remains about 15% below the high reached in 2023. Natural gas production in West Virginia has been impressive and largely tracked the trend of New Mexico since 2017. West Virginia is also on pace to surpass Louisiana in gas production in 2025 (*Figure 15b*).

Figure 14. Crude Oil Production in Major Oil-Producing States

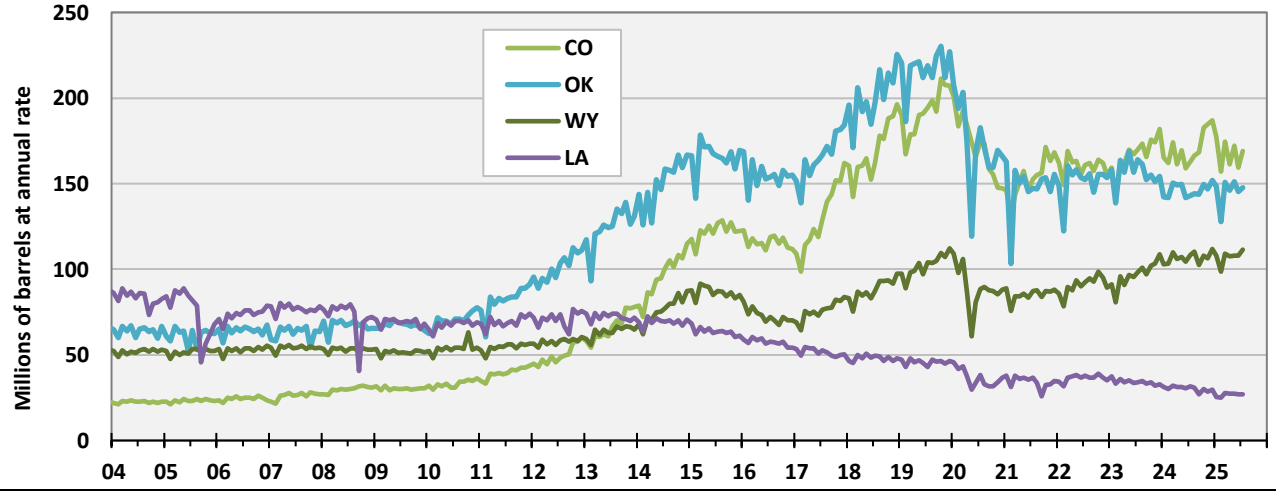
(a) U.S. and Texas



(b) New Mexico, North Dakota, Alaska, and California

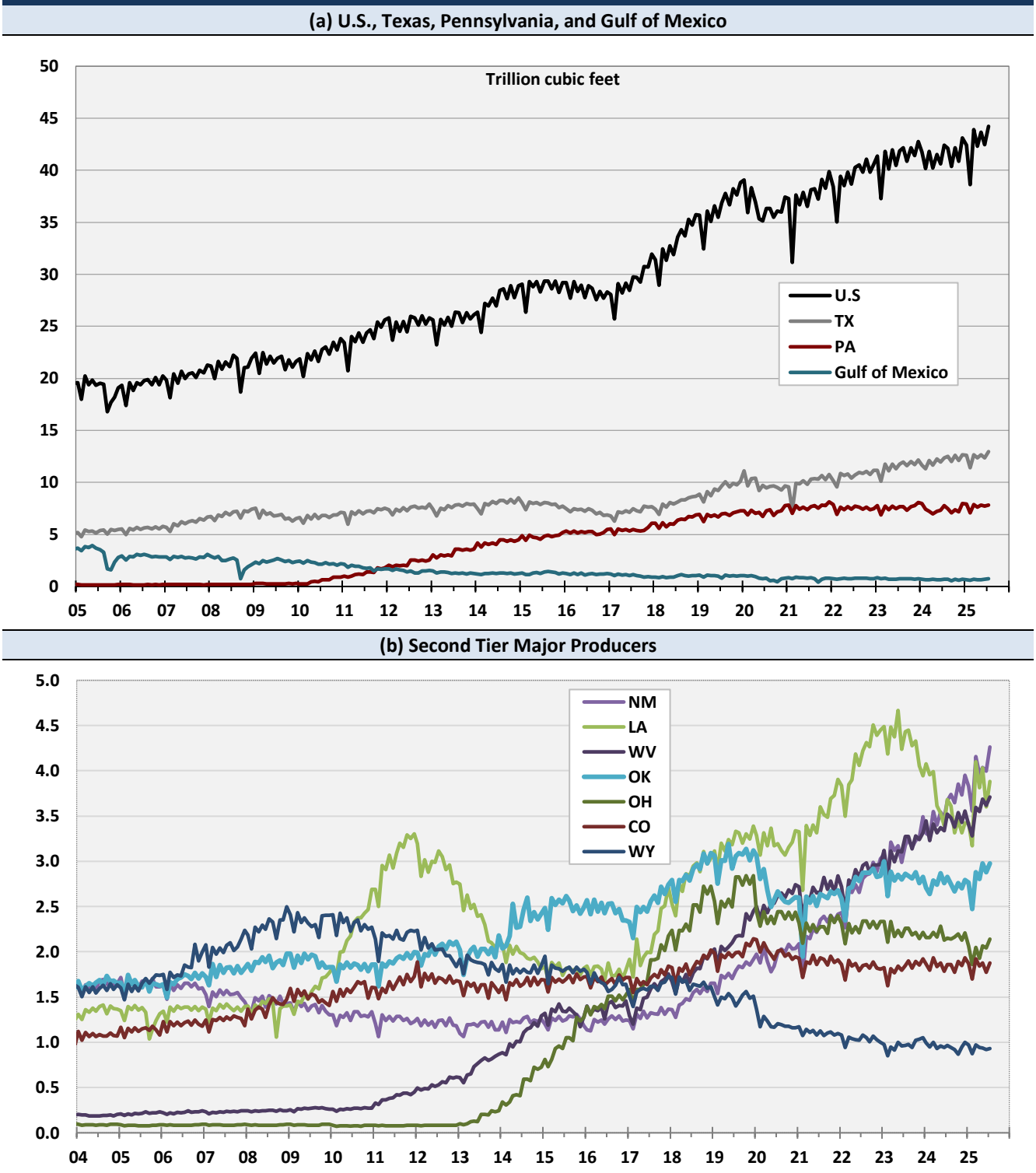


(c) Other Major Oil Producers - CO, OK, WY, and LA



Source: U.S. Energy Information Administration and RegionTrack calculations

Figure 15. Gas Production in Major Natural Gas-Producing States



Source: U.S. Energy Information Administration and RegionTrack calculations

In contrast, production in Oklahoma, Ohio, Colorado, and Wyoming continues to trend sideways or down through the first half of 2025. Combined, these four states have produced no new gas production since the onset of the pandemic in 2020. The rankings among these four states also remain unchanged since the onset of the pandemic. Ohio has not managed to keep pace with gas production in Pennsylvania. Wyoming remains in a structural down trend in gas production that began in 2009 and extended beyond the pandemic.

Royalties Reflect Production Trend

Estimated royalty payments from state oil and gas production totaled an estimated $3.2 billion in 2024, a slight decline of 6% from $3.4 billion in royalties in 2023 (*Figure 16*). The softness reflects both a pullback in market prices and weakness in production volumes for both crude oil and natural gas.

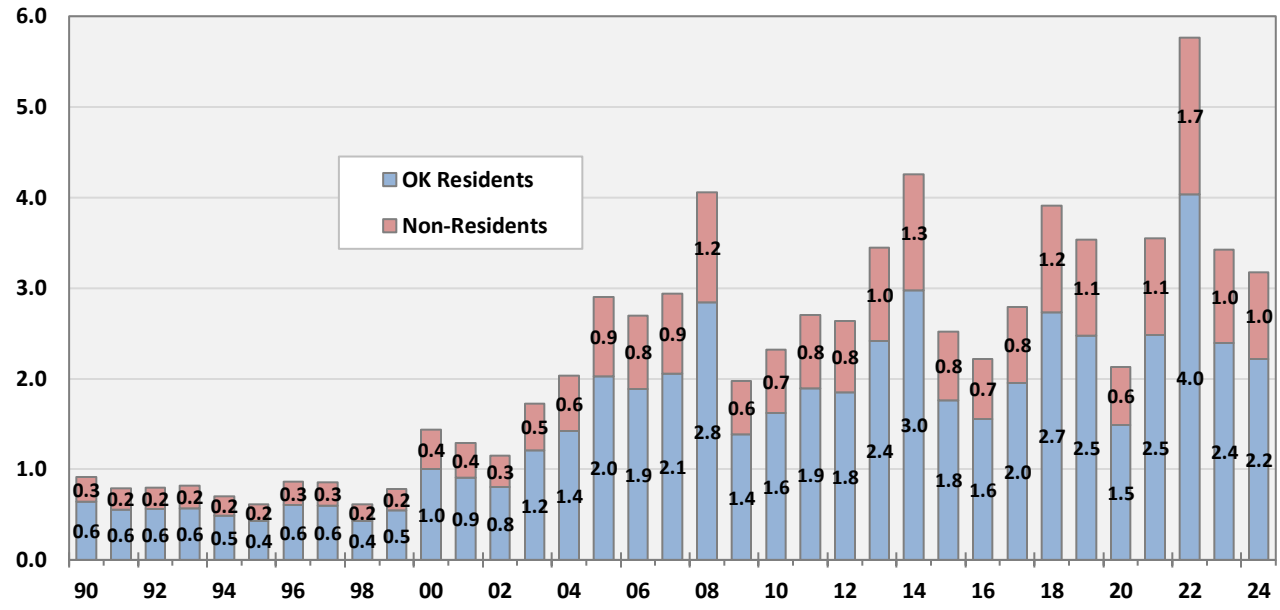
Of the $3.2 billion in total payments, an estimated $2.2 billion (69%) was received by Oklahoma-based recipients, with the remaining $1 billion (31%) accrued to recipients outside the state.[3]

Total royalty payments paid to state residents in 2023 are roughly equal to the amounts received in the pre-pandemic years of 2018 and 2019 as well as the initial post-pandemic year of 2021.

Since the re-emergence of the state oil and gas industry began in 2003, estimated royalty payments to Oklahoma residents from state production have totaled $46.7 billion and averaged $2.1 billion annually. For long-term comparison, current royalties of $2.2 billion paid to Oklahoma residents in 2024 are nearly four times larger than the $630 million annual average paid in the 1990 to 2002 period prior to the reemergence of the industry.

Figure 16. Estimated Royalty Payments from Oklahoma Oil and Gas Production

billions of dollars, calendar year



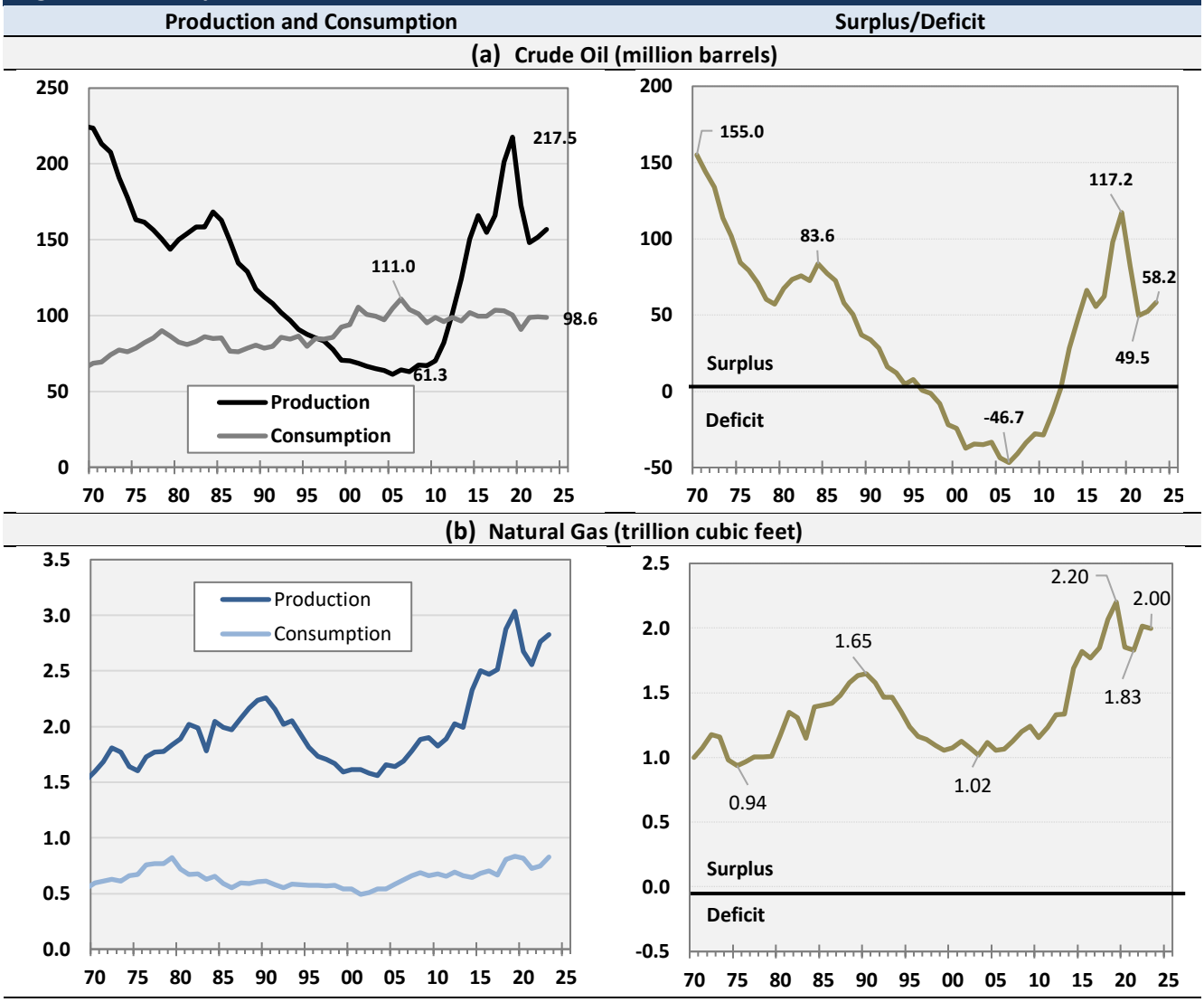
Source: Royalty rates and residency shares are derived from proprietary firm reports of royalty amounts and recipient addresses. Market values of production used in estimating royalty payments are based on calendar year production values.

Oil and Gas Exports Soften Post-Pandemic

Oklahoma remains a significant exporter of both crude oil and natural gas outside the state. Oil and natural gas that are produced in Oklahoma but not consumed within the state are generally exported outside the state. From an economic development perspective, producing exports for external consumption is a far more significant economic event for the state economy than producing for in-state consumption. Figure 17 summarizes crude oil and natural gas production and consumption trends in Oklahoma through 2023, the most recent year of available data.

Crude Exports. The steep decline in state oil production in 2020 and 2021 (*Figure 17a*) is reflected in a shrinking surplus and weak net oil exports from the state in the post-pandemic period (*Figure 17b*). After posting a record oil surplus of 117.2 million barrels in 2019, the surplus dropped nearly 60% in the post-pandemic period to only 49.5 million barrels in 2021 (*Figure 17a*). The surplus rebounded modestly through 2023, reaching 58.2 million barrels in 2023. The totals oil surplus equated to approximately one-third of the 156.7 million barrels of production in 2023.[4]

Figure 17. Net Exports of Oklahoma Crude Oil and Natural Gas



Notes: Net exports are measured as state production minus state consumption as defined by EIA.
Source: U.S. Energy Information Administration and RegionTrack calculations

Natural Gas Exports. The state's surplus in natural gas similarly pulled back in the post-pandemic period. The pullback in the surplus of natural gas production totaled 17% from 2019 to 2021 (*Figure 17b*). The most recent estimate of the natural gas surplus reached 2.0 Tcf in 2023 and remains roughly double the 1.02 Tcf reported at the most recent low in 2008 and the point at which state natural gas production began to ramp up. The state's natural gas surplus of 2.0 Tcf in 2023 equaled approximately 71% of total state natural gas output of 2.83 Tcf.

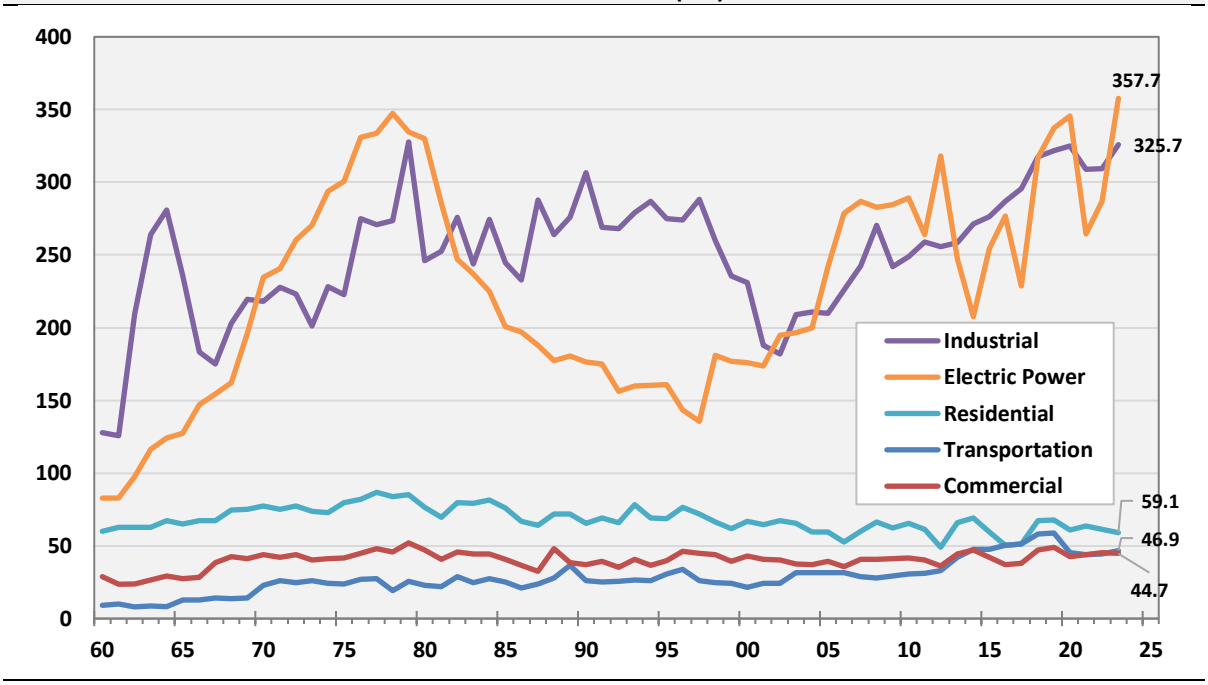
Natural Gas Usage in Oklahoma Electricity Production. Electricity producers in Oklahoma continue to consume significant amounts of natural gas (*Figure 18*). In 2023, the most recently available data, natural gas used in electricity production totaled 358 Bcf, or 43% of a total 834 Bcf of natural gas consumed for all uses.

Electric power was the largest end-use of natural gas in the state in 2023, just ahead of industrial use of 320 Bcf. Industrial users consumed an average of approximately 39% of the 2.83 Tcf in total natural gas consumed statewide in 2023.

Far smaller amounts of natural gas were used in all other use categories including residential (59 Bcf), transportation (47 Bcf), and commercial (45 Bcf) in 2023.

State natural gas output continues to far exceed the supply needed to support increased natural gas usage in power production in the state. Natural gas used in power production represented only 12.6% of the 2.83 Tcf of natural gas produced in the state in 2023. Significant excess supply remains to support either added use in the state or expanded exports outside the state.

Figure 18. Oklahoma Natural Gas Consumption by Use Category



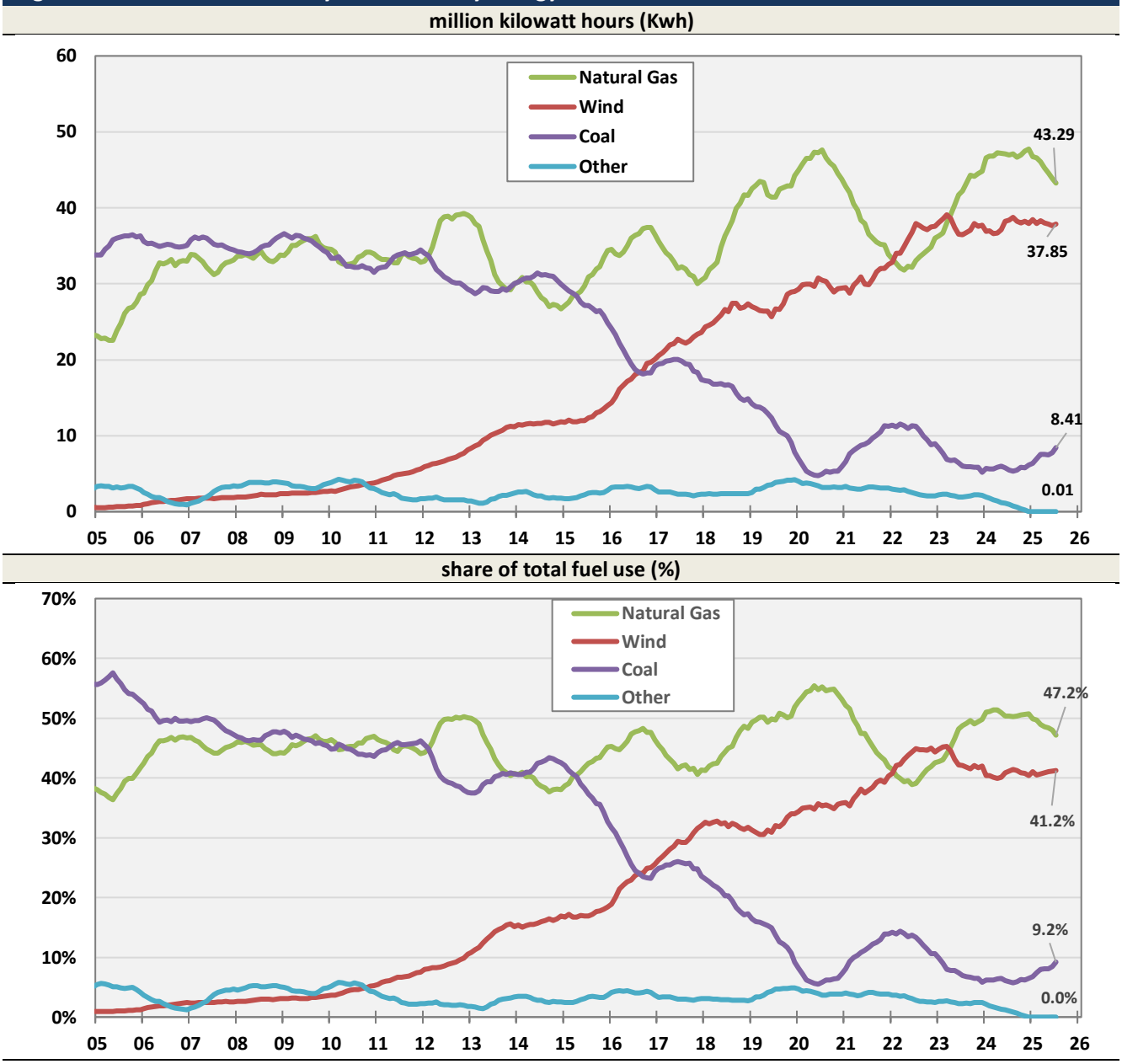
Notes: Consumption data is an annual total
Source: U.S. Energy Information Administration and RegionTrack calculations

Oklahoma's Changing Electricity Fuel Mix. Natural gas has served as the most used fuel used in power generation in Oklahoma the past decade (*Figure 19*). In the most recent data through July 2025, natural gas was used to produce 47% of electricity generated in the state. Wind power was the second most used source for electricity with a 41% share, surpassing coal use in 2016. The use of wind increased steadily from 2010 to early 2023 but has since softened and stabilized at about 41% of total electricity production.

Coal has now largely been pushed out of the electricity mix in Oklahoma, with only a 9% share of production remaining in July 2025. All other fuels accounted for only a negligible amount of electricity produced in Oklahoma in the latest monthly data.

Natural gas has ranked as one of the top two sources for electricity generation for the past several decades. Natural gas comprised an average of 46% of electricity generation in Oklahoma since 2006. The share ranged from a low of 38% in 2014 during a brief surge in coal usage and a high of 55% in 2020 during a steep drop in coal usage during the pandemic.

Figure 19. Oklahoma Electricity Production by Energy Source

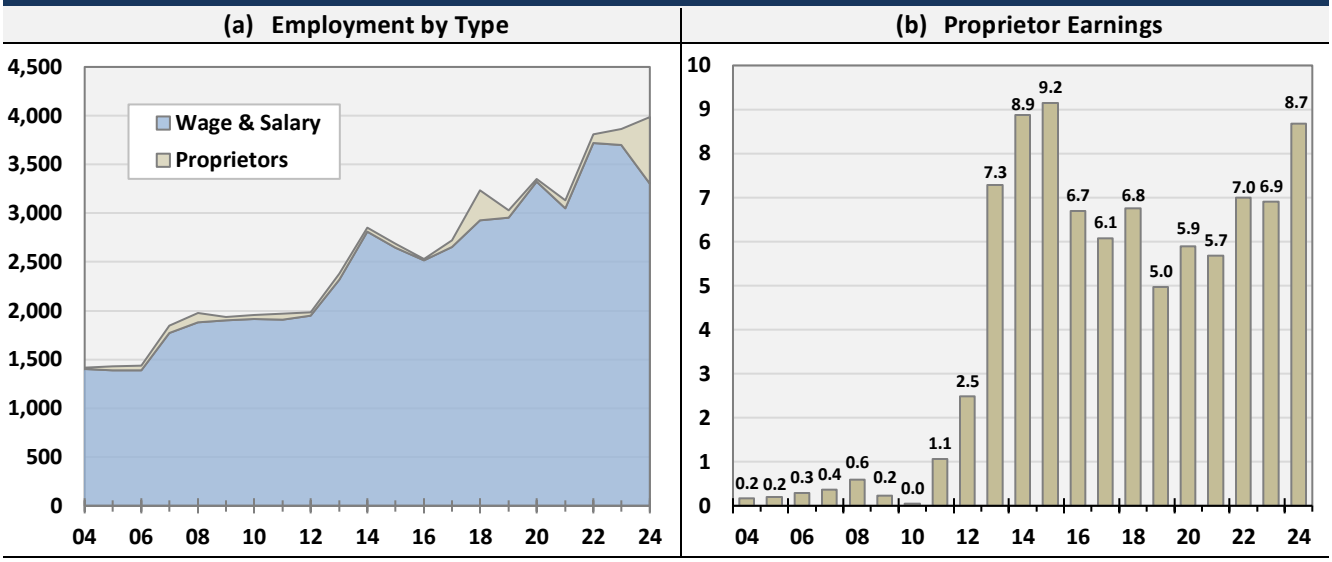


Notes: Production data are monthly through July 2025
Source: U.S. Energy Information Administration and RegionTrack calculations

Pipelines are Key Component of Oil & Gas Cluster

Pipeline Industry Contribution. Rising energy production led to significant added pipeline-related activity in Oklahoma in recent years. In 2024, the pipeline sector consisted of 164 firms that produced $6.9 billion in GDP and $9.3 billion in earnings to households in the state (*Figure 1*). The numerous partnerships and other business entities operating pipelines in the state employed almost 4,000 total workers in 2024 (*Figure 20a*), including nearly 700 self-employed proprietors and 3,300 wage and salary workers. Wage and salary workers earned an average of $192,170 in compensation.

Figure 20. Total Employment and Proprietors' Earnings – Oklahoma Pipeline Sector



Source: Bureau of Economic Analysis

Pipeline Proprietor Earnings. Proprietors in the pipeline sector received $8.7 billion in total earnings from their ownership interest in pipeline firms in 2024, an average of $12.7 million per proprietor. These earnings represent 35% of total proprietor income earned in the state oil and gas cluster in 2024 (*Figure 20b*). Proprietor earnings in the pipeline sector accelerated sharply beginning in 2013 as the state's pipeline network was expanded to accommodate rising oil and gas production within the state. The proprietor earnings in pipelines have averaged $7.0 billion annually from 2013 to 2024. This income provided a significant boost to overall state household income in the past decade and during the recent pandemic.[5]

IV. Drilling and Exploration Activity

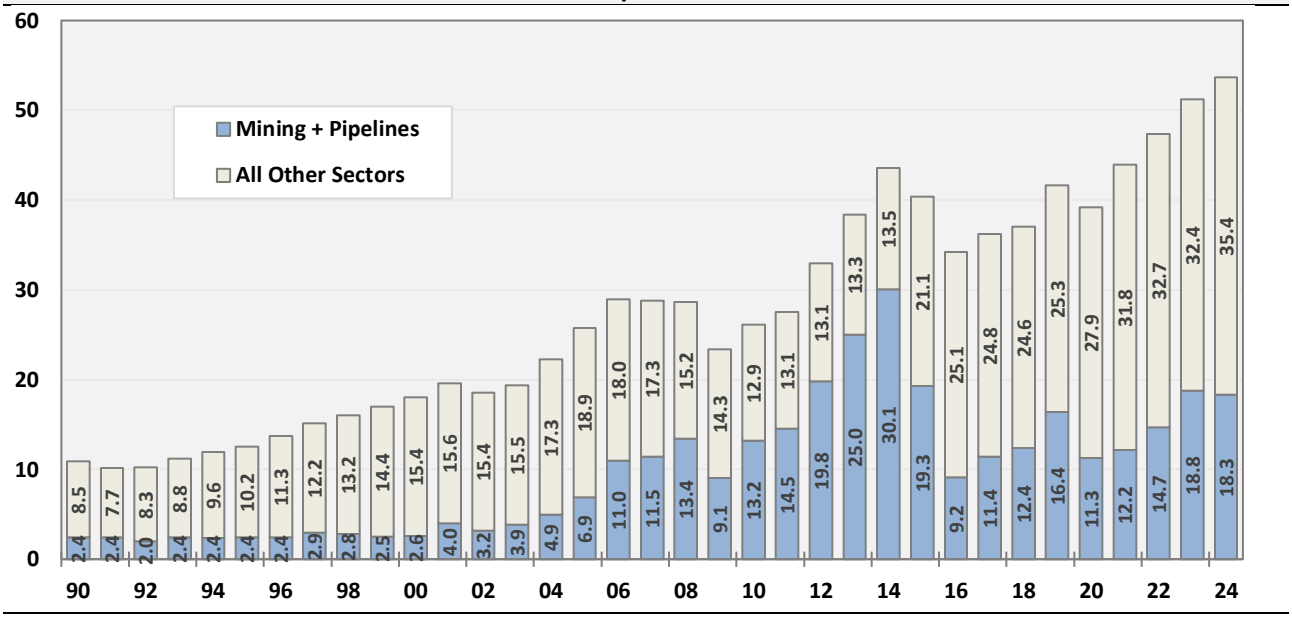
Many segments of the state's oil and gas cluster are highly capital-intensive and have become increasingly so in recent years. The investment activity in the oil and gas cluster can easily sway overall statewide capital spending patterns. Within the cluster, most investment in recent years is tied to either traditional drilling and production activity or the development of pipelines. Demand for pipelines increased substantially in the past decade to transport added production of both crude oil and natural gas. The remaining sectors of the state's oil and gas cluster accounted for far smaller amounts of ongoing fixed private investment.

Investment in the Oil and Gas Cluster

The oil and gas cluster remains a key source of private investment in Oklahoma. Figure 21 details annual estimates of investment for the mining and pipeline sectors relative to all other statewide sectors combined in the 1990 to 2024 period.[6] The broader mining sector is used in the estimates for consistency with the industry structure used in national databases on fixed investment. However, approximately 97% of mining sector activity in Oklahoma is within the traditional oil and gas sectors of the cluster.

Recent Oil and Gas Cluster Investment. Oil and gas investment continues to recover from both the sharp downshift in drilling activity that began in 2015 and the pullback during the recent pandemic. Private fixed investment in the cluster dropped to $11.3 billion in 2020 during the pandemic before resuming an upward trend through 2024. Oil and gas investment posted a slight pullback in 2024 to $18.3 billion, down 3% from $18.8 billion 2023. Investment in both 2023 and 2024 exceeded all other years since 2015.

Figure 21. Annual Private Fixed Investment – Oklahoma



Notes: Fixed investment includes structures, equipment, and intellectual property. State-level capital at the industry level is estimated using the approach of Garofalo and Yamarik (see endnotes).
Source: U.S. Bureau of Economic Analysis and RegionTrack calculations

Total investment statewide posted a record in 2024, reaching $53.7 billion. This reflects the fourth consecutive year of added investment in the state since the pandemic year of 2020. Estimates indicate that of the $53.7 billion in total private fixed investment made in the state in 2024, $18.3 billion (34%) was made by firms in the state's mining and pipeline sectors. All other state industries combined made fixed investments totaling $35.4 billion in 2024, or the remaining two-thirds (66%).

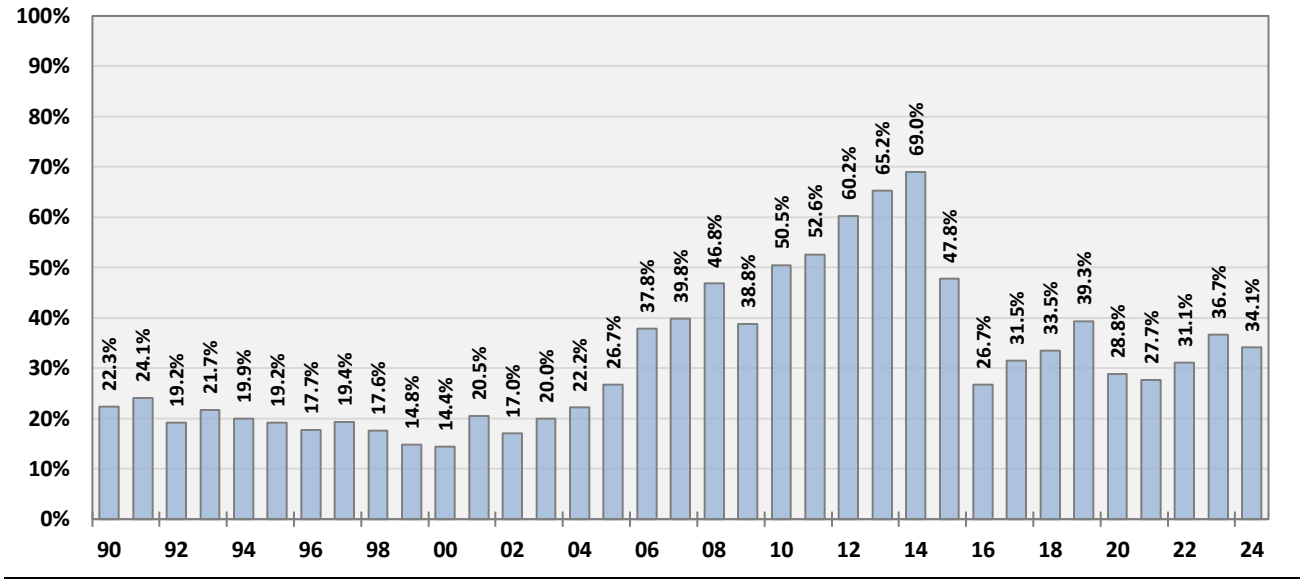
Capital investment in the mining and pipeline sectors has been subdued since 2016 relative to peaks in the prior decade. The primary reasons for slower drilling activity are pressure from lower crude oil and natural gas prices, shareholder demands for greater net cash return by public firms, and a general shift toward greater caution in

making drilling investments. Average annual investment in mining and pipelines has averaged $13.9 billion annually since 2016, versus $20.3 billion annually from 2010 to 2015. However, current investment remains well above spending prior to the reemergence of the industry in 2003. Total investment spending in these two sectors averaged only about $2 to $3 billion annually in the 1990 to 2002 period.

Since the industry began to reemerge in 2003, the mining and pipeline sectors of the oil and gas cluster in Oklahoma have made cumulative investments of an estimated $307 billion, or an average of $14.0 billion annually. This is consistent with Oklahoma capturing a roughly 6-12% share of total domestic investment in traditional oil and gas activity and pipelines in recent years.[7] Oklahoma captured 10.4% of domestic investment in mining and pipelines in 2024.

The share of total state private investment activity taking place in the mining and pipeline sectors has fluctuated between 25% and 35% since drilling activity in the state downshifted in 2016 (*Figure 22*). The current share is just above the average share of 32% since 2016 following the downshift to lower energy prices in 2014 and 2015. Despite the slowing in investment, the state's oil and gas cluster remains the largest single source of capital spending in Oklahoma, by a substantial margin.[8]

Figure 22. Mining and Pipeline Share of Total State Private Fixed Investment – Oklahoma

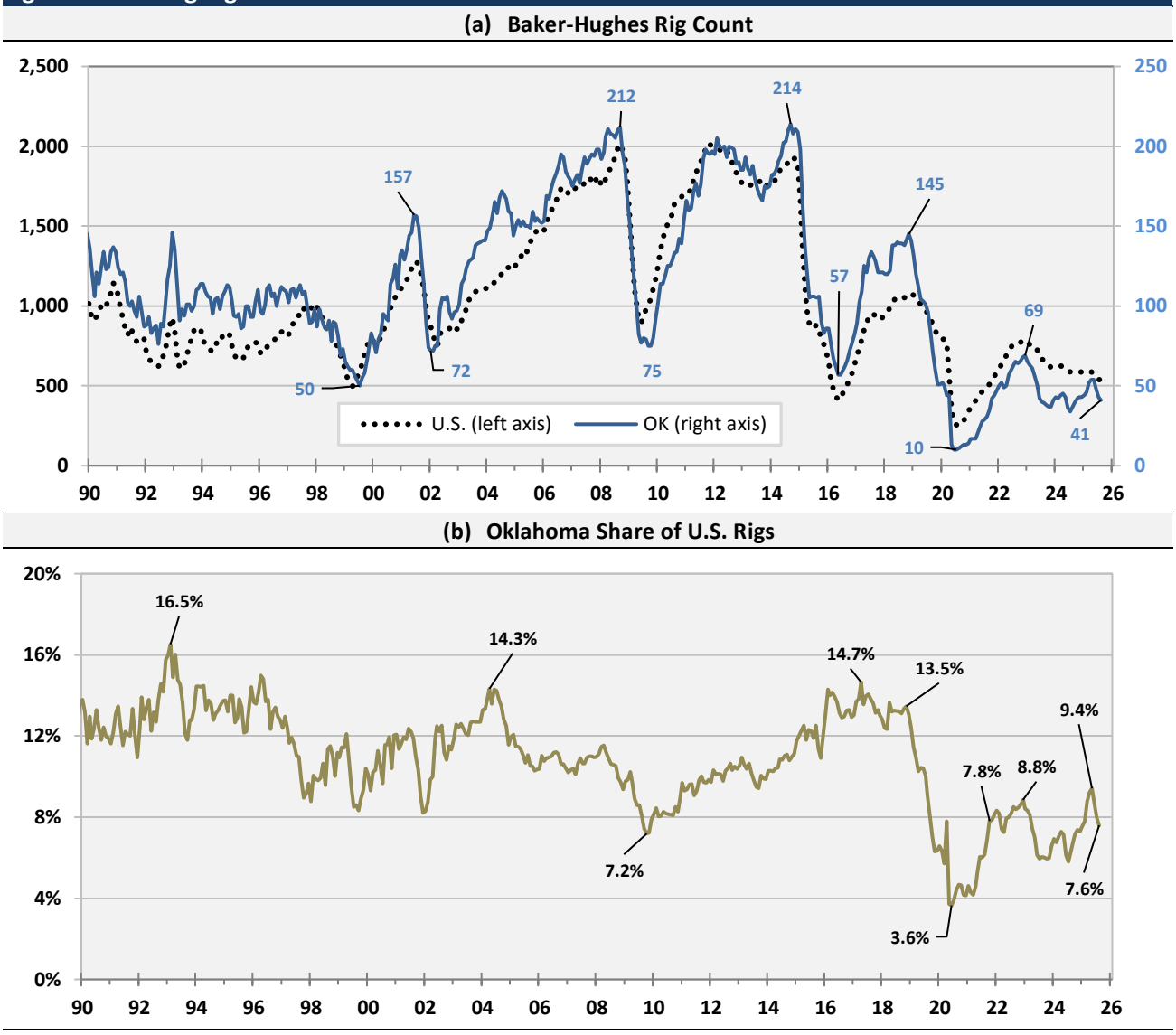


Notes: Fixed investment includes structures, equipment, and intellectual property. State-level investment at the industry level is estimated using the approach of Garofalo and Yamarik (see endnotes). The oil and gas cluster share includes the mining and pipeline sectors.
Source: U.S. Bureau of Economic Analysis and RegionTrack calculations

Drilling and Completion Activity

Rig Counts. The number of drilling rigs operating in Oklahoma remained subdued throughout 2024 but rebounded modestly in the first half of 2025. The current rig count in August 2025 totaled 41 active rigs. This is only about one-third the rigs seen at the prior intermediate term peak of 145 rigs reached back in early 2019 before national and state exploration entered an extended slowdown (*Figure 23*). After the onset of the pandemic, the state rig count plummeted to a low of only 10 rigs in mid-year 2020, the lowest rig count in the state in the modern era of oil and gas development. Although the state rig count made a modest recovery to 69 rigs in mid-year 2022, the current 41 rigs operating remains near the lowest count in the modern era excluding the pandemic period.

Figure 23. Drilling Rig Count – OK vs. U.S.



Notes: Rig count is a monthly average of data through September 2024.
Source: Baker-Hughes and RegionTrack calculations

Currently, the state's 7.6% share of U.S. rigs in August 2025 is near historical lows excluding the pandemic period after hovering near historical highs of approximately 14% as recently as 2018. The state's share surge to 9.4% in early 2025 but has since given back those gains. The state's share of U.S. rigs fell to a low of only 3.6% in the aftermath of the pandemic, the state's lowest share of U.S. rigs in the modern drilling era.

Figure 24. Oklahoma Rig Count History by County (2015-2025)

County	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	10-Yr. Avg.
Adair	0	0	0	0	0	0	0	0	0	0	0	0.0
Alfalfa	7	1	1	1	1	0	0	0	0	0	0	0.5
Atoka	0	0	0	0	0	0	0	0	0	0	0	0.1
Beaver	0	0	0	0	0	0	0	0	0	0	0	0.0
Beckham	2	1	1	1	0	0	0	0	0	0	0	0.3
Blaine	6	12	21	19	10	0	3	5	3	3	4	8.1
Bryan	0	0	0	0	0	0	0	0	0	0	0	0.0
Caddo	0	0	2	1	1	0	0	1	1	1	1	0.8
Canadian	10	6	10	11	9	4	5	7	8	7	5	7.3
Carter	3	1	1	2	2	2	1	2	1	2	3	1.6
Cherokee	0	0	0	0	0	0	0	0	0	0	0	0.0
Choctaw	0	0	0	0	0	0	0	0	0	0	0	0.0
Cimarron	0	0	0	0	0	0	0	0	0	0	0	0.0
Cleveland	0	0	0	0	0	0	0	0	0	0	0	0.0
Coal	2	1	2	1	1	0	0	1	1	0	0	0.7
Comanche	0	0	0	0	0	0	0	0	0	0	0	0.0
Cotton	0	0	0	0	0	0	0	0	0	0	0	0.0
Craig	0	0	0	0	0	0	0	0	0	0	0	0.0
Creek	0	0	0	0	0	0	0	0	0	0	0	0.0
Custer	3	2	4	5	2	1	1	2	2	2	3	2.3
Delaware	0	0	0	0	0	0	0	0	0	0	0	0.0
Dewey	4	5	8	8	4	1	1	3	2	2	1	3.3
Ellis	3	2	4	4	3	1	1	2	4	4	1	2.5
Garfield	5	1	2	2	1	0	0	0	0	3	0	1.0
Garvin	4	1	7	6	6	1	1	3	3	0	1	2.8
Grady	17	9	18	28	20	5	7	10	7	7	4	11.5
Grant	1	0	0	0	0	0	0	0	0	0	0	0.0
Greer	0	0	0	0	0	0	0	0	0	0	0	0.0
Harmon	0	0	0	0	0	0	0	0	0	0	0	0.0
Harper	0	0	0	0	0	0	0	0	0	0	0	0.0
Haskell	0	0	0	0	1	0	0	0	0	0	0	0.1
Hughes	2	1	4	4	1	1	0	1	0	0	0	1.2
Jackson	0	0	0	0	0	0	0	0	0	0	0	0.0
Jefferson	0	0	0	0	0	0	0	0	0	0	0	0.0
Johnston	1	0	1	0	0	0	0	0	0	0	0	0.2
Kay	1	0	0	0	0	0	0	0	0	0	0	0.0
Kingfisher	10	11	17	21	11	2	3	7	4	2	2	8.0
Kiowa	0	0	0	0	0	0	0	0	0	0	0	0.0
Latimer	0	0	0	0	0	0	0	0	0	0	0	0.0
Le Flore	0	0	0	0	0	0	0	0	0	0	0	0.0
Lincoln	1	0	0	0	0	0	0	0	0	1	1	0.2
Logan	1	0	1	1	0	0	0	0	0	0	0	0.3
Love	3	1	1	1	2	1	2	2	0	0	0	1.1
Major	2	2	4	4	3	0	1	2	1	1	1	1.9
Marshall	1	0	0	0	1	0	0	0	0	0	0	0.2
Mayes	0	0	0	0	0	0	0	0	0	0	0	0.0
McClain	1	1	2	6	3	1	1	3	2	1	1	2.0
McCurtain	0	0	0	0	0	0	0	0	0	0	0	0.0
McIntosh	0	0	0	0	1	0	0	0	0	0	0	0.1
Murray	0	0	0	0	0	0	0	0	0	0	1	0.1
Muskogee	0	0	0	0	0	0	0	0	0	0	0	0.0
Noble	0	0	0	0	0	0	0	0	0	0	0	0.0
Nowata	0	0	0	0	0	0	0	0	0	0	0	0.0
Okfuskee	0	0	0	0	0	0	0	0	0	0	0	0.0
Oklahoma	1	0	0	0	1	0	1	1	0	0	0	0.3
Okmulgee	0	0	0	0	0	0	0	0	0	0	0	0.0
Osage	0	0	0	0	0	0	0	0	0	0	0	0.0
Ottawa	0	0	0	0	0	0	0	0	0	0	0	0.0
Pawnee	0	0	0	0	0	0	0	0	0	0	0	0.0
Payne	2	1	1	0	0	0	0	0	0	0	0	0.1
Pittsburg	3	1	2	2	2	0	0	2	0	1	1	1.1
Pontotoc	0	0	0	0	0	0	0	0	0	0	0	0.0

Continued

Figure 24. (Cont.) Oklahoma Rig Count History by County

County	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	10-Yr. Avg.
Pottawatomie	0	0	0	0	0	0	0	0	0	0	0	0.0
Pushmataha	0	0	0	0	0	0	0	0	0	0	0	0.0
Roger Mills	3	1	2	1	0	0	0	0	1	2	3	1.0
Rogers	0	0	0	0	0	0	0	0	0	0	0	0.0
Seminole	0	0	0	0	0	0	0	0	0	0	0	0.0
Sequoyah	0	0	0	0	0	0	0	0	0	0	0	0.0
Stephens	6	1	3	2	2	2	1	3	5	3	2	2.3
Texas	0	0	0	0	0	0	0	0	0	0	0	0.0
Tillman	0	0	0	0	0	0	0	0	0	0	0	0.0
Tulsa	0	0	0	0	0	0	0	0	0	0	0	0.0
Wagoner	0	0	0	0	0	0	0	0	0	0	0	0.0
Washington	0	0	0	0	0	0	0	0	0	0	0	0.0
Washita	2	0	0	0	0	0	0	0	0	0	0	0.2
Woods	7	2	0	1	1	0	0	0	1	0	0	0.6
Woodward	0	2	2	1	0	0	0	0	0	0	0	0.6
Statewide	115	68	120	134	90	22	30	59	47	41	34	64.6

Notes: Data for 2025 is an average of monthly counts through September.
Source: Baker-Hughes

Rig Activity by County. Continued softness in oil and natural gas prices, increased rig productivity, and reduced overall rig activity led to increased concentration of drilling activity among Oklahoma counties in recent years. Through the first three quarters of 2025, drilling rigs operated in only 17 of the state's 77 counties (*Figure 24*). The number of operating rigs has leveled off at a very low level of activity in the past few years, with rigs operating in 16 counties in 2024, 16 counties in 2023, and 18 in 2022. In 2019, prior to the onset of the pandemic, rigs operated in 24 counties. For comparison, 30 Oklahoma counties had rigs operating in 2015, only a decade ago.

Canadian led all counties with 5 rigs operating in 2025. Blaine and Grady counties were the next most active counties with 4 rigs each. Three additional counties – Carter, Custer, and Roger Mills – had 3 rigs operating in the period. Kingfisher and Stephens are the only other counties with more than a single drilling rig operating in 2025.

Grady was the most active drilling county a decade ago, when 17 rigs were operating. The most active drilling counties a decade ago generally experienced the largest pullback in activity relative to current counts, especially the traditional drilling counties of Stephens, Woods, Ellis, Kingfisher, Dewey, Alfalfa, Garvin, Canadian, and Blaine. Several counties with no rigs operating currently had significant rig activity a decade ago. In 2015, Alfalfa had 7 rigs, Woods had 7 rigs, Garfield had 5 rigs, Hughes had 4 rigs, and Love had 3 rigs, but all have no rigs currently.

Trends in Producing Wells. Roughly 39,000 wells produced oil or gas in Oklahoma in data for June 2025 (*Figure 25*). About 10,600 of the wells produced both oil and gas, while 23,300 produced only natural gas and 5,100 produced only liquids. Nearly all wells (33,900 or 89%) produced some natural gas, but only about 40% (15,700 wells) produced some liquids.

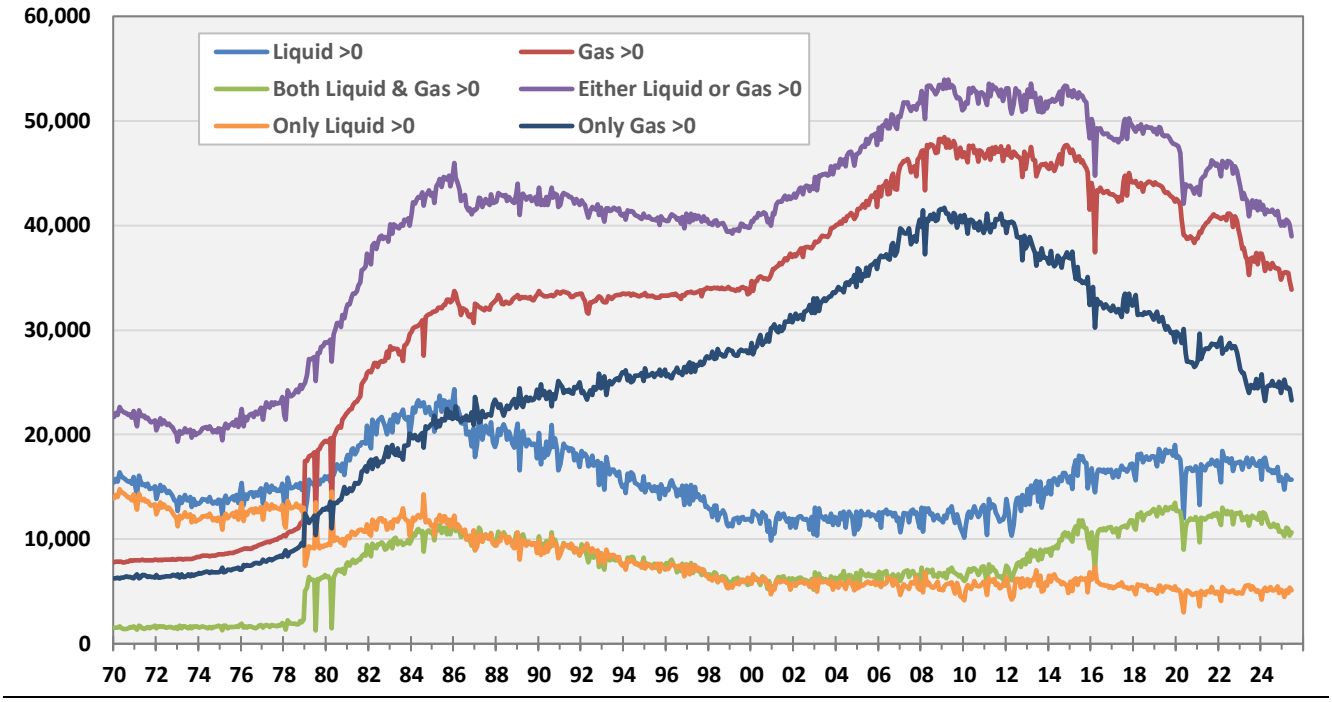
Distinct shifts have taken place in the number and type of operating oil and gas wells in Oklahoma. Two primary shifts have occurred over the past 25 years as unconventional drilling and production methods initially provided greater access to existing gas reserves and subsequently improved access to existing liquid reserves.

The initial shift brought with it a rapid expansion in drilling of new wells beginning in 2001 and 2002, particularly gas wells, as exploration in the state reemerged. Between 2001 and about 2009, the number of wells in the state increased by about 14,000 (35%), with nearly all new wells producing some natural gas. About 10,000 of the new wells produced only natural gas. Wells producing liquids remained nearly unchanged at about 12,000 in the period. The number of wells producing only liquids dropped by a few hundred in the period as exploration focused on natural gas. Unconventional production on natural gas sites began to produce a significant boost in the amount of natural gas produced.

A second shift leading to fewer total wells emerged around 2009 during the Great Recession period as the industry placed greater emphasis on exploration for liquids rather than dry gas. The number of wells producing liquids increased from about 11,000 in 2009 to 18,000 in early 2020 just prior to the onset of the pandemic. However, the total number of wells operating dropped precipitously in the period as the number of wells producing only gas declined by about 17,000 between 2009 and 2025.

The most recent data suggests a continued steady downtrend in the number of wells producing natural gas and some softening in the number of wells producing liquids. The sole category showing stability across 2024 and 2025 is the number of wells producing only liquids.

Figure 25. Number of Producing Wells by Mix of Production - Oklahoma



Notes: Data extend through June 2025
Source: S&P Global and RegionTrack calculations

Proved Reserves

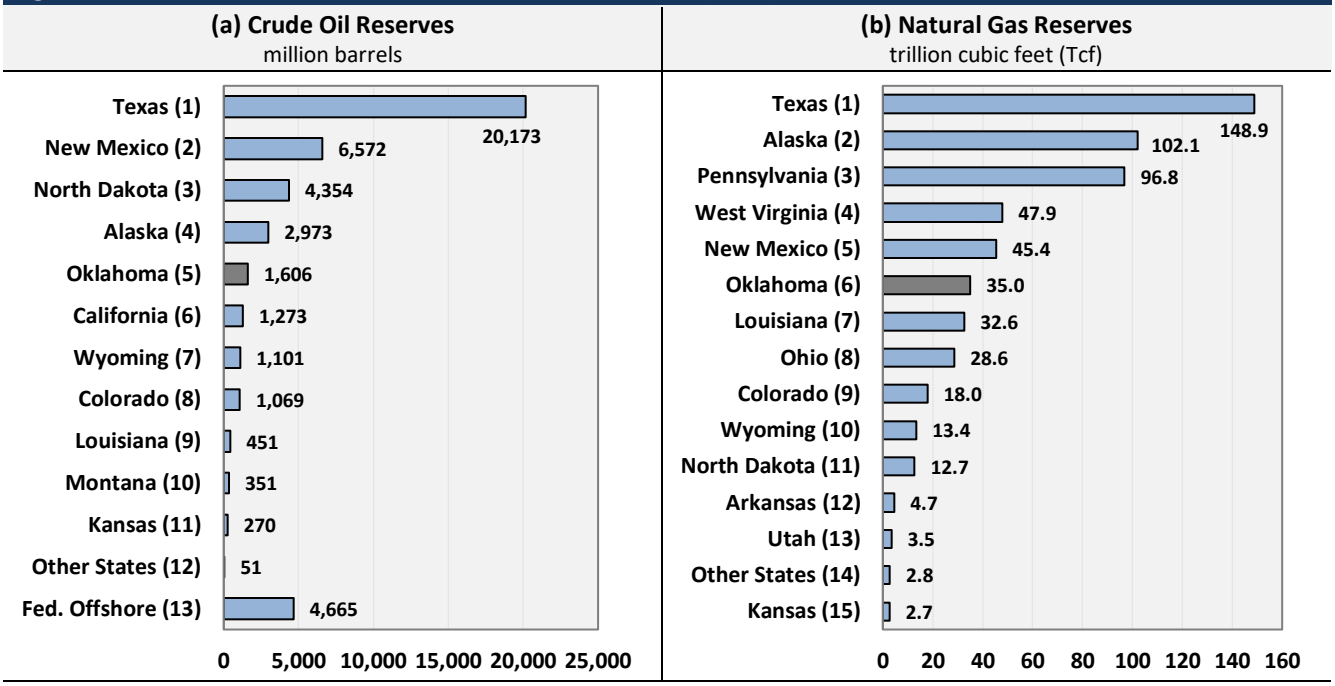
Oklahoma remains home to substantial reserves of both crude oil and natural gas. Figure 26 provides the most recently available EIA estimates of proved reserves in Oklahoma versus other top producing states in 2023.

For crude reserves, Oklahoma now ranks 5th among the states with 1.61 billion barrels of proved reserves (*Figure 26a*). The state most recently passed California in the rankings. Oklahoma still trails well behind traditional large crude producers North Dakota and Alaska but is now well ahead of California, Wyoming, and Colorado.

Oklahoma's 35.0 Tcf of natural gas proved reserves continues to rank 6th among the major producing states (*Figure 26b*). The two largest gas producers, Texas and Pennsylvania, both have approximately 100 Tcf or more of proved natural gas reserves. Alaska was recently credited with the 2nd highest natural gas reserves with 102.1 Tcf in proved gas reserves in 2023.

West Virginia and New Mexico both remained slightly ahead of Oklahoma in 2023. Oklahoma continues to lead Louisiana and Ohio by a small margin but remains well ahead of Colorado, Wyoming, and North Dakota.

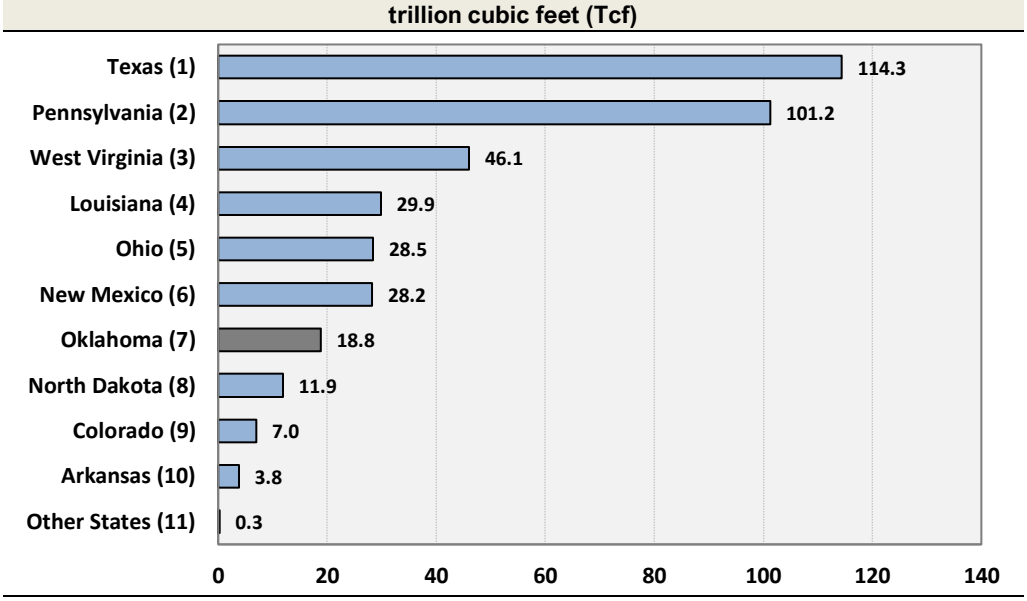
Figure 26. Proved Reserves of Crude Oil and Natural Gas (2023)



Notes: Crude oil reserves include both crude oil and lease condensate. Natural gas reserves include both dry gas and liquids.
Source: U.S. Energy Information Administration

Measured by natural gas reserves found in shale formations, Oklahoma ranked 7th among the producing states with 18.8 Tcf in proved reserves in 2023 (*Figure 27*). Shale gas represented more than half (54%) of total proved natural gas reserves in Oklahoma in the period.

Figure 27. Shale Gas Proved Reserves by State (2023)



Source: U.S. Energy Information Administration

V. Oil and Gas Cluster Share of Total State Economic Activity

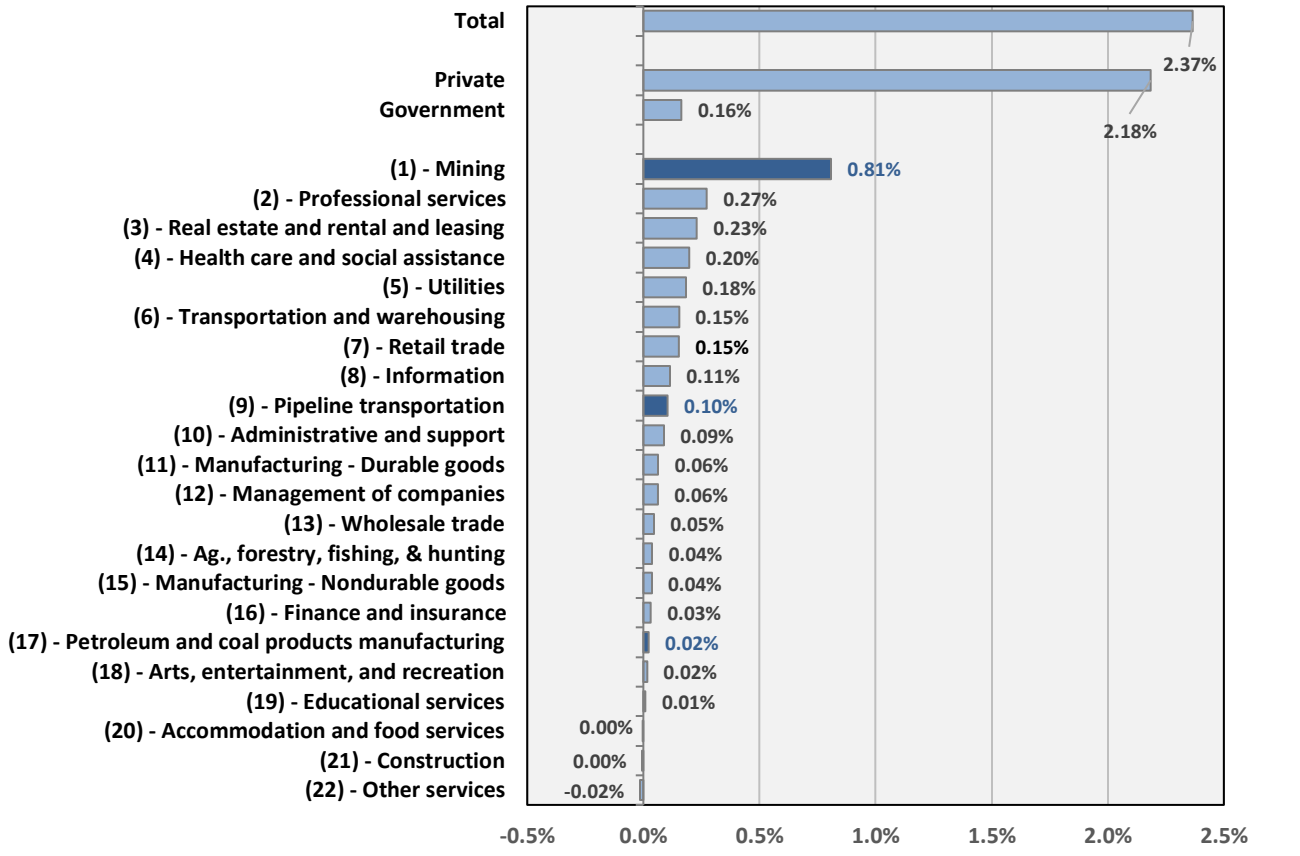
The Oklahoma oil and gas cluster continues to make an outsized economic contribution to the Oklahoma economy. This section of the report evaluates two key measures of the economic influence of the sector. The first is the contribution of the oil and gas cluster to state real GDP growth over time. The second is the share of total household earnings paid by firms operating in the cluster in recent years. Both of these measures determine the degree to which changes in the state's oil and gas sector affect statewide economic activity.

Oil and Gas Cluster Contribution to State GDP Growth

Since the reemergence of the domestic oil and gas industry beginning in 2003, the oil and gas cluster has been the largest contributor to economic growth in Oklahoma across all major sectors, by a substantial margin. Figure 28 summarizes the contribution of each major NAICS sector to real GDP growth in Oklahoma over the two decades from 2004 to 2024. Three of the sectors – mining, pipelines, and refineries (i.e., Petroleum and coal products manufacturing) – are major components of the state's oil and gas cluster.

Figure 28. Industry Level Contributions to Real GDP Growth – Oklahoma

average annual percent change in GDP by sector in the 2004–2024 period



Notes: The mining sector is used in this section to represent traditional oil and gas activity because the Bureau of Economic Analysis makes these calculations readily available only for major NAICS sectors. The oil and gas sector represents nearly all mining sector activity in Oklahoma.
Source: Bureau of Economic Analysis

Mining, pipelines, and refineries are highlighted in Figure 28 to illustrate the relative rankings and contributions of these components of the oil and gas cluster to total state economic growth. Across the full period, the Oklahoma economy posted average real GDP growth of 2.37% annually. The private sector contributed 2.18% of total growth annually, while the government sectors added 0.16% annually.

Remarkably, the mining sector alone contributed more than one-third (0.81% annually) of all real GDP growth in the state in the period. The pipeline sector produced the 9th largest contribution to real GDP growth in the

period, with a 0.1% annual contribution. Refineries (i.e., Petroleum and coal products manufacturing in Figure 28) contributed an additional 0.02% to annual real state GDP growth in the period.

Combined, the mining, pipeline, and refinery components of the state oil and gas cluster contributed an average of 0.93% per year to real state GDP since 2004. The three sectors produced 39% of total real growth in the state in the period. All other sectors combined contributed only 1.46% annually in the period, or about 61% of the total increase in real GDP since 2004.

The state's mining sector far outpaced the contribution of all other major sectors. The GDP produced in mining exceeded the contribution of the 2nd ranked Professional Services (0.27% annually) sector and the 3rd ranked Transportation and Warehousing (0.23% annually) sector by a factor of approximately three or more in the period.

The 0.10% contribution of the Pipeline sector roughly matched the Retail Trade sector and exceeded the contribution of more than a dozen major sectors including Durable Goods Manufacturing (0.06%), Wholesale Trade (0.05%), and Nondurable Goods Manufacturing (0.04%).

Several sectors contributed 0.1% or less to annual GDP growth in the period, including Accommodation and Food Services. Three of these sectors – private Educational Services, Construction, and Other Services – contributed negatively to overall state real GDP growth in the period.

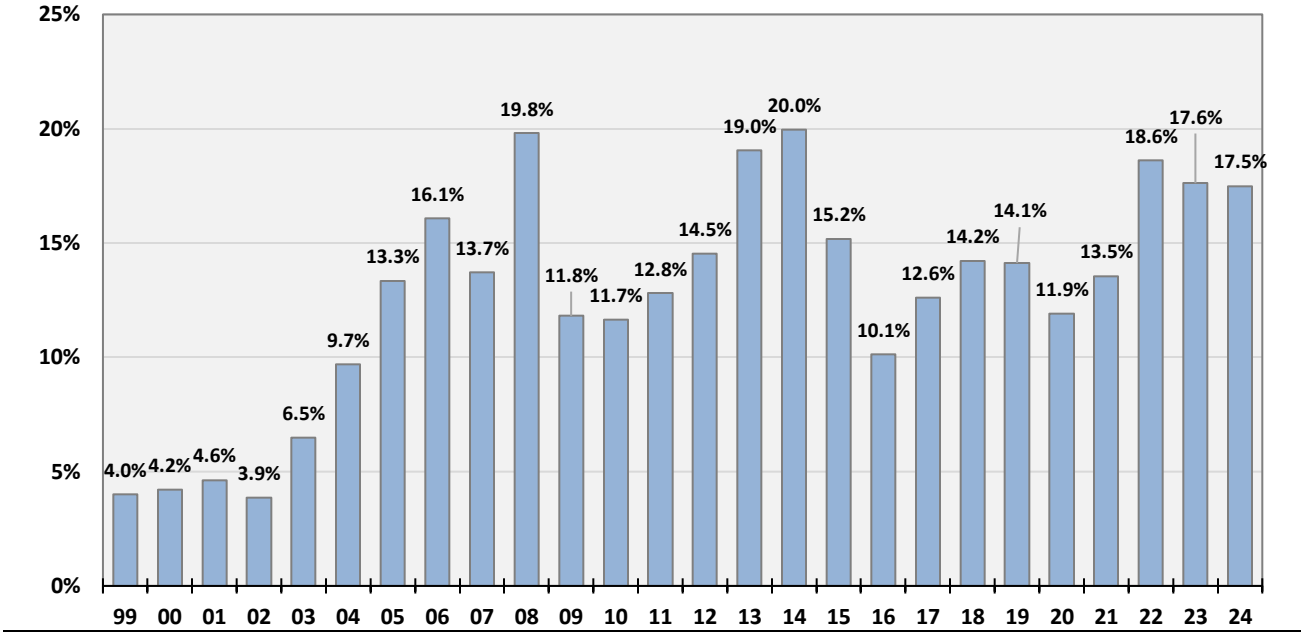
Oil and Gas Share of Household Earnings

The influence of oil and gas activity on the state economy is closely tied to the high share of total household earnings derived directly from the state's oil and gas cluster. Household earnings include both the compensation paid to wage and salary workers and the income received by self-employed proprietors and participants in oil and gas partnerships.

Firms in the oil and gas cluster provided $30.4 billion in earnings to households across the state in 2024. This equates to 17.5% of total household earnings statewide (*Figure 29*). The cluster's share of earnings declined slightly relative to 2023 and 2022 but remained well above the 13% average share in the 2015 to 2021 period. However, the 2024 earnings share remained below the recent peak rates of nearly 20% in 2013 and 2014. The share also neared 20% in 2008 during a period of elevated energy prices.

Again, the oil and gas cluster represents only 2.8% of all firms statewide and 4.2% of total statewide employment but accounts for 17.5% of total household earnings statewide.

Figure 29. Share of State Household Earnings Derived from Oil and Gas Cluster



Notes: Household earnings is defined by Bureau of Economic Analysis as employee compensation plus proprietors' income. Proprietor income consists primarily of the income of sole proprietors and partnerships operating in the oil and gas cluster.
Source: Bureau of Economic Analysis and RegionTrack calculations

VI. Economic Spillovers from Oil and Gas

The direct activity taking place within the state's oil and gas cluster produced a substantial economic contribution to the state economy in 2024. The 3,400 firms operating in the cluster produced $31.0 billion in state GDP and employed 103,400 wage and salary and self-employed workers who earned $30.4 billion in household earnings.

Like all industry sectors, the state's oil and gas cluster has a strong degree of economic interdependence with the other components of the state economy. In this section, we provide estimates of the economic spillover activity and gross contribution of the oil and gas cluster to the overall state economy.

Modeling Regional Linkages. The direct activity taking place within the oil and gas cluster creates measurable spillover activity that can be measured in the form of GDP (or value added), household earnings, and employment created in other sectors of the economy. Estimates of spillover effects are formed using RIMS II input-output multipliers produced by the U.S. Bureau of Economic Analysis (BEA).[9] RIMS II multipliers provide model-based estimates of the impact that a local final demand shock has on total value added, earnings, and employment within a region.[10] The multipliers can also be used to estimate an industry's total (or gross) contribution to the state economy.

The approach uses the direct activity of firms operating within the cluster along with a model of the flow of expenditures between businesses, households, and the government sector within the state.[11] The spillover activity occurs as firms in the oil and gas cluster purchase goods and services from firms in other sectors of the economy. In other words, the multipliers provide a convenient method for estimating the spillover effects that a change in *GDP*, *employment*, or *earnings* within the oil and gas cluster may have on broader state economic activity.

To accommodate the various activities taking place within the oil and gas cluster, data for each component of the cluster are matched by natural business segment to the RIMS II industry structure. The individual effects of each sector of the cluster are estimated and then aggregated to determine the overall cluster effect.[12]

Figure 30. Gross Economic Contribution - Oklahoma Oil and Gas Cluster (2024)

	Direct Effects			Indirect & Induced Effects			Total Effects		
Cluster Sector	GDP ($Mil.)	House-hold Earnings ($Mil.)	Total Employ-ment	GDP ($Mil.)	House-hold Earnings ($Mil.)	Total Employ-ment	GDP ($Mil.)	House-hold Earnings ($Mil.)	Total Employ-ment
Oil & Gas Extraction	$17,523	$14,081	66,021	17,164	13,138	137,819	34,687	27,219	203,840
Oil & Gas Drilling	481	523	3,067	639	662	6,069	1,120	1,185	9,136
Oil & Gas Support Activities	2,474	2,690	19,715	2,710	2,910	27,991	5,184	5,600	47,706
Refineries	2,224	2,676	2,148	2,586	2,786	4,868	4,810	5,462	7,016
Other Petroleum & Coal Prod. Mfg.	343	413	606	399	430	1,374	742	843	1,980
Oil & Gas Field Mach. & Equip. Mfg.	936	583	6,179	811	660	10,501	1,747	1,243	16,680
Pipelines	6,890	9,316	3,986	2,711	9,316	11,160	9,601	18,632	15,146
Geophysical Survey. Mapping	158	130	1,712	138	74	1,406	296	204	3,118
Oil and Gas Cluster – Total	**$31,028**	**$30,413**	**103,435**	**$27,157**	**$29,977**	**201,188**	**$58,186**	**$60,389**	**304,622**
Traditional Oil and Gas Sectors	**$20,478**	**$17,294**	**88,803**	**$20,512**	**$16,710**	**171,879**	**$40,990**	**$34,004**	**260,682**
Ancillary Sectors	**$10,551**	**$13,118**	**14,631**	**$6,645**	**$13,267**	**29,309**	**$17,196**	**$26,385**	**43,940**

Source: Bureau of Economic Analysis: RIMS and RegionTrack calculations

Gross Economic Contribution of the Oil and Gas Cluster.[13] Gross economic spillover impacts resulting from the operation of the state's oil and gas cluster in 2024 are detailed in Figure 30.

The overall results suggest that the operations of the oil and gas cluster along with its spillover effects have a sizeable influence on the broader state economy. In total, the state's oil and gas cluster supported an estimated $58.2 billion in state GDP, $60.4 billion in household earnings, and 304,600 total jobs statewide in 2024.[14]

GDP. The $58.2 billion in total state GDP is the broadest measure of the total economic contribution of the cluster and can be partitioned into direct, indirect, and induced effects.[15] The *direct* effect includes $31.0 billion in GDP generated directly by the cluster. The direct output of the cluster in turn supports an incremental $27.2 billion in indirect and induced output in other industries statewide. In other words, each dollar of direct output within the cluster supports an additional $0.88 in estimated GDP statewide. The *indirect* effect is the economic output generated in the state resulting from spending by firms in the cluster on goods and services for production or to fund capital expenditures. The *induced* effect reflects the economic output generated in other sectors of the state economy resulting from new household spending in the state out of household earnings received as part of the direct and indirect effects. The $58.2 billion in estimated state GDP supported by the activity of firms in the oil and gas cluster represents 22.1% of total statewide GDP of $263.7 billion in 2024.

Household Earnings. The total impact of $60.4 billion in household earnings supported by the cluster's activities and expenditures can also be partitioned into direct, indirect, and induced effects. The *direct* effect is the $30.4 billion in earnings paid directly to employees and self-employed proprietors in the cluster. The direct earnings support an incremental $30.0 billion in indirect and induced earnings for workers in other industries statewide. Each dollar of direct earnings by cluster employees and proprietors supports an additional $0.99 of household earnings statewide. The *indirect* effect is the earnings paid in the state resulting from expenditures on goods and services by the cluster. The *induced* effect reflects the earnings paid in other sectors of the state economy resulting from new household spending in the region out of earnings received as part of the direct and indirect effects. The $60.4 billion in estimated gross household earnings supported by the activity of firms in the oil and gas cluster represents 34.7% of total statewide household earnings of $173.9 billion in 2024.

Employment. Measured by direct employment, 103,400 employees worked as either wage and salary workers or self-employed proprietors in the Oklahoma oil and gas cluster in 2024. This employment supported an additional 201,200 jobs statewide through estimated indirect and induced effects. The *indirect* effect is the employment generated across the state as a result of spending by firms in the cluster on goods and services. The *induced* effect reflects the employment generated in other sectors of the economy resulting from new household spending in the state out of household earnings received as part of the direct and indirect effects. In total, the operations of the oil and gas cluster directly and indirectly supported more than 304,600 jobs statewide. Each direct job in the oil and gas cluster produced almost 2 additional jobs through indirect and induced effects. The total number of supported workers represents 12.3% of total statewide employment of 2,474,908 in 2024.

VII. Tax Contributions of the Oil and Gas Industry

Production-Type Taxes

Oklahoma's oil and gas cluster continues to make significant tax payments to state and local government. Taxes on the production of oil and natural gas remain a key source of tax revenue to state and local governments in Oklahoma.

The largest and most important of these taxes are tied directly to the production of crude oil and natural gas. Often referred to as gross production taxes, production-type taxes are typically based on the value of oil and natural gas produced and are subject to significant volatility as commodity prices and oil and natural gas output fluctuate over time. Production taxes are typically assessed on oil and gas activity occurring on both private and public lands.

Historically, Oklahoma has assessed a base 7% severance tax (before deductions, exemptions, and rebates) on the value of most crude oil and natural gas production. Since June 2018, qualified new production is taxed at 5% for the first 36 months of production, with the base rate then reverting to 7% over the remaining life of the well.

The state also assesses a relatively small excise tax on oil and gas production. The excise tax rate is 0.095 of 1% (ninety-five one thousandths of one percent) of the gross value of each barrel of crude oil and one thousand cubic feet of natural gas that is produced in the state and subject to the severance tax.

Like owners of mineral rights on private lands, the state receives royalties, rents, bonuses, and other payments related to oil and gas production on state-owned land. The state also receives remittances from the federal government for oil and gas production that occurs on federal land within the state. Producers make payments to the federal government for royalties on production plus rents and bonuses. All states except Alaska receive 50% of extraction revenues paid to the federal government from leases on federal land in that state.

Across all production-type taxes, revenue from Oklahoma oil and gas production slowed for a second consecutive year in FY2025 to $1.09 billion, down 6% from $1.15 billion in FY2023 (*Figure 31*).

In FY2025 by type of production tax, the state received an estimated $1.01 billion in severance and excise tax payments, $68.5 million in state land royalties and payments, and $5.5 million in federal land payments.

Effective Gross Production Tax Rate

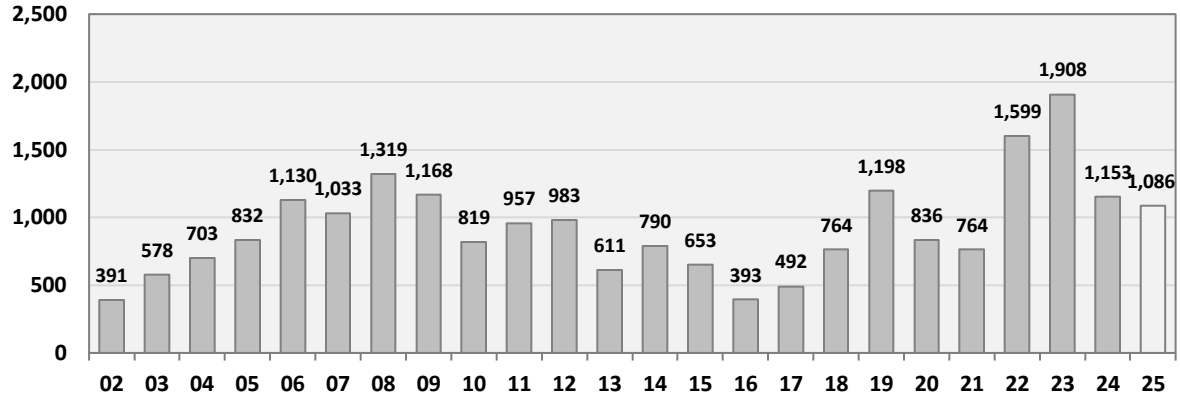
Figure 32 provides updated effective gross production tax rates for oil and gas production in Oklahoma from FY1999 through FY2025. The effective tax rate is calculated as total gross production tax receipts (net of refunds) divided by the estimated market value of crude oil and natural gas production.[16] Gross production revenue used in the calculation includes severance and excise taxes along with federal and state land payments. Production and commodity prices are stated on a fiscal year basis. The effective rate includes all production-type payments for production on all land types (private, state, and federal). Changes in the effective tax rate are due to shifts in production across the various tax rate categories, exemptions, refunds, and market value changes.

The effective production tax rate in Oklahoma reached a recent high of 7.5% in FY2023 before falling to 6.5% in FY2024 and 6.2% in FY2025. The overall effective production tax rate averaged 6.7% in the FY2023 to FY2025 period, nearly double the 3.6% effective rate in FY2017 when significant rebates were in place.

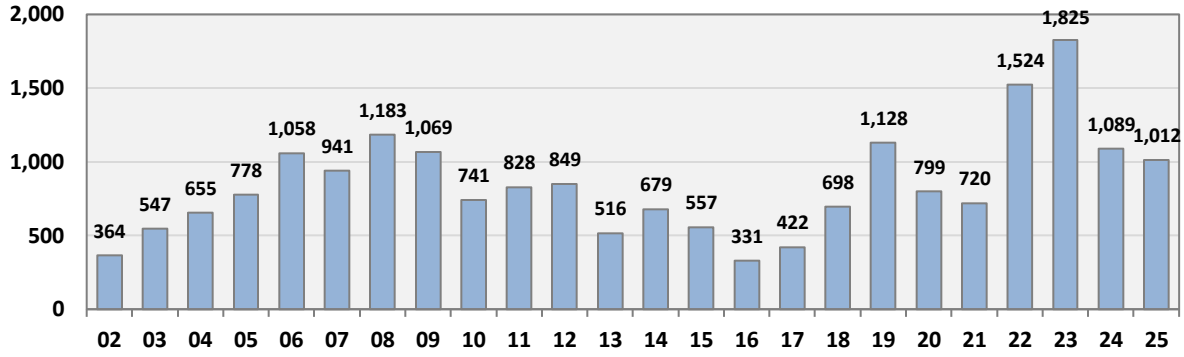
The state's effective production tax rate has averaged 6.2% since FY2019 when increased severance taxes were reinstituted across most production following an extended period of severance tax relief provided by the legislature. The subsequent rise in the effective rate reflects the implementation of House Bill 1010XX raising severance tax rates in the state. Beginning July 1, 2018, production of crude oil and natural gas from all new wells and all existing wells taxed at the previous 2% rate are taxed at a new 5% rate for the first 36 months of production. All wells revert to a 7% rate after 36 months of production.

Figure 31. Oil and Gas Production-Type Taxes – Oklahoma (Fiscal Year)

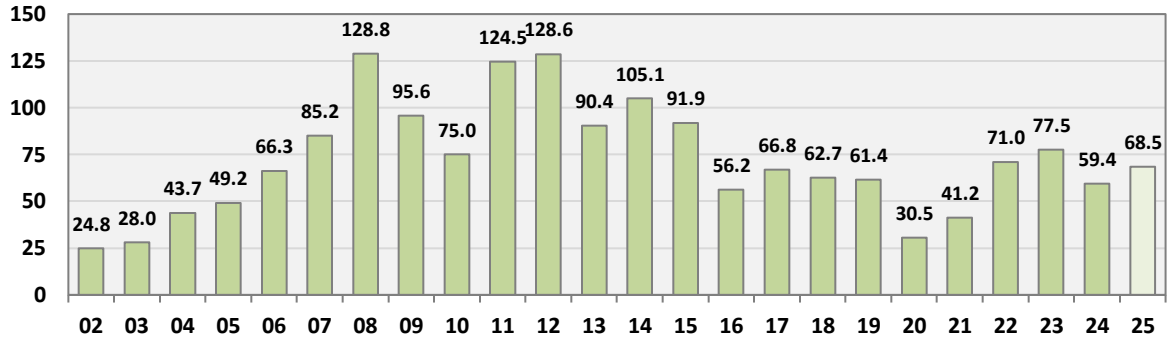
(a) Total Production-Type Taxes ($millions)



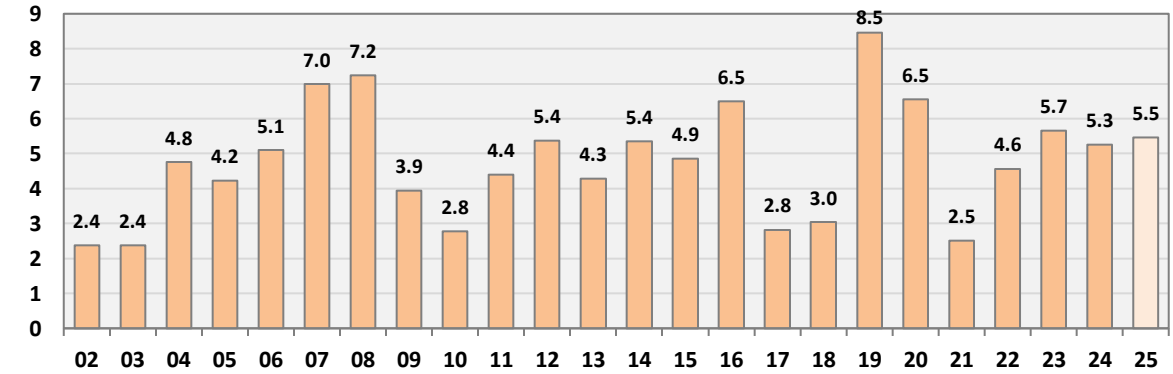
(b) Severance and Excise Tax ($millions)



(c) State Land Royalties and Payments ($millions)



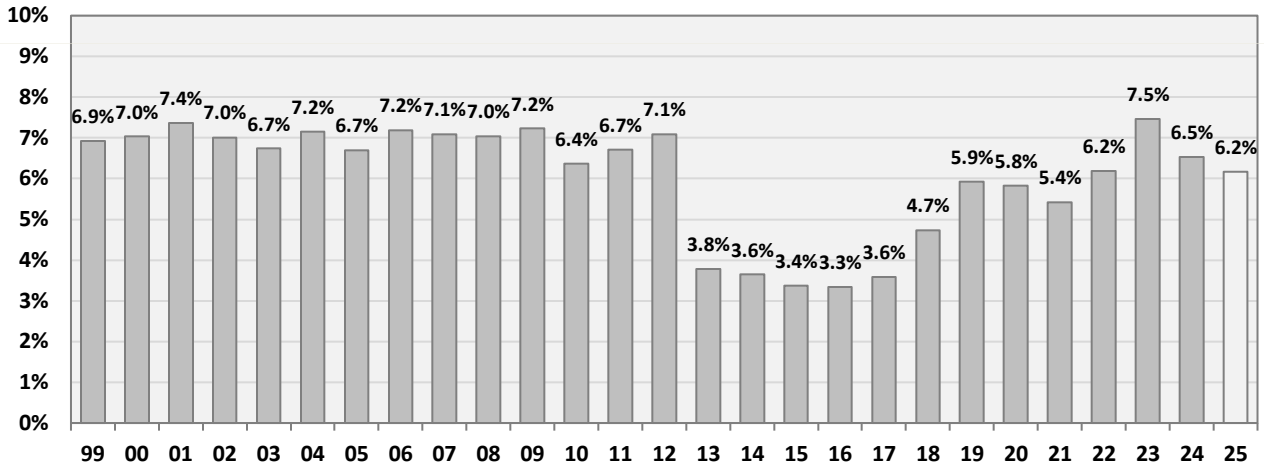
(d) Federal Lands Onshore Royalties and Payments ($millions)



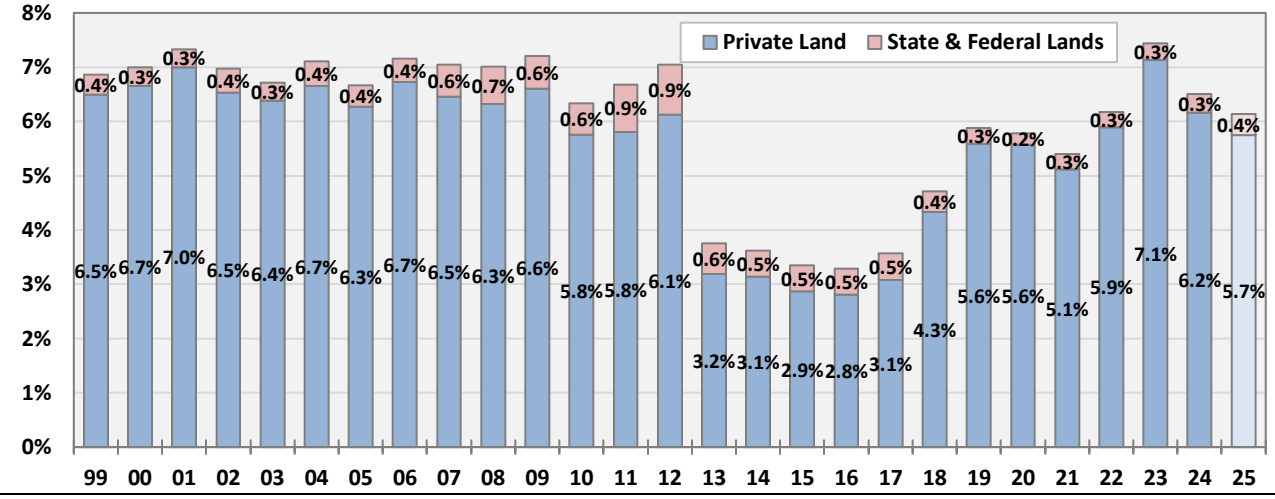
Notes: Production values and taxes are calculated by fiscal year. Severance and excise tax data reflect actual reported receipts for FY2025. State and federal lands estimates for FY2025 represent averages of the two prior fiscal years. The total tax estimate for FY2025 reflects the estimates for state and federal lands.
Source: Oklahoma Tax Commission, Oklahoma Commissioners of the Land Office, U.S. Dept. of the Interior (Natural Resources Revenue Data), and RegionTrack calculations

Figure 32. Effective Oil and Gas Production Tax Rate – Oklahoma

(a) Effective Production Tax Rate on Total Production (Private, State, & Federal Onshore)



(b) Effective Production Tax Rate on Total Production by Land Type



Notes: Effective tax rates are calculated on a fiscal year basis. Production volume estimates are derived from EIA data. Production of crude oil is based on EIA estimates of field production. Production of natural gas is based on EIA estimates of marketed production. The price of oil is based on the first purchaser price at the state level provided by EIA. The price of natural gas is from NGI. Values for public lands in FY2025 represent estimates using averages in prior two years.
Source: U.S. Energy Information Administration, NGI, Oklahoma Tax Commission, Oklahoma Commissioners of the Land Office, U.S. Dept. of the Interior (Natural Resources Revenue Data), and RegionTrack calculations

Gross Production Tax - Changes in Tax Rates vs. Production

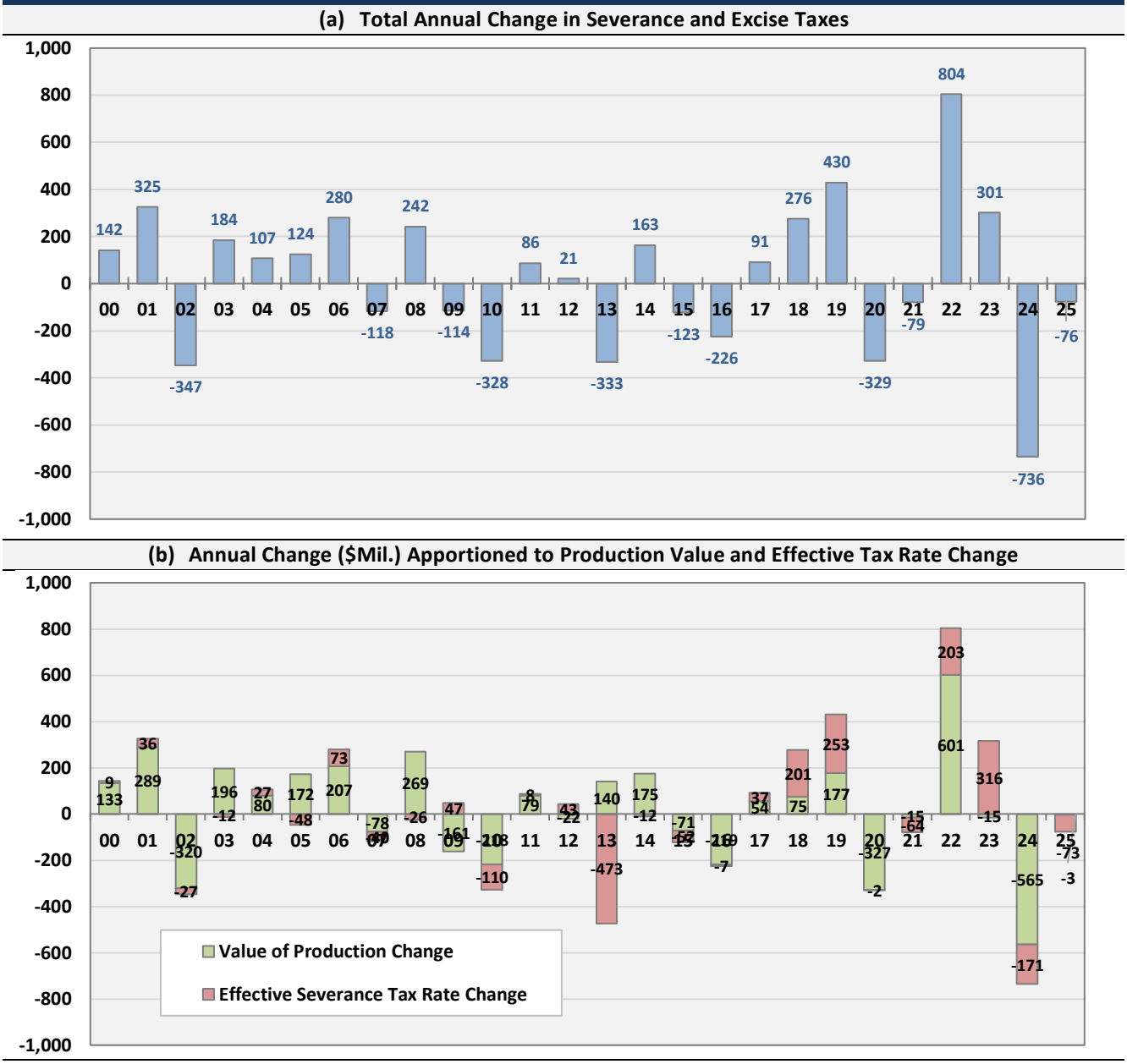
Annual changes in gross production tax collections can be apportioned to either a change in the effective gross production tax rate or a change in the taxable value of production. Annual changes in collections since FY2002 are apportioned to changes in either the effective tax rate or production value in Figure 33. Figure 33a reflects the total change in annual payments while Figure 33b reflects the relative contribution of the two components of change – tax rates and production value.

Changes are typically dominated by valuation changes, with relatively small annual changes due to fluctuations in the effective tax rate. The recent large shift in the effective tax rate in FY2024 reflects production shifting between the 5% and 7% gross production tax brackets. These are captured as tax rate changes in Figure 33b.

The state experienced a relatively small downward change in production taxes in FY2025. However, production taxes posted significant gyrations in the sources of change in production taxes in the three prior fiscal years. The state posted a substantial $804 million gain in FY2022 due to a $601 million gain from an increase in valuation and a $203 million gain from an increase in the effective tax rate. This was followed by a $301 million annual increase in FY2023 comprised of a small reduction in production value (-$15 million) and a large gain due to the

effective tax rate ($316 million). The large overall gains in severance and excise taxes in FY2022 and FY2023 were subsequently nearly fully reversed through a $736 million drop in taxes in FY2024. An estimated $565 million of the FY2024 decline is explained by a decrease in valuation while $171 million of the decline is due to a reduction in the effective tax rate. For FY2025, the $76 million total decline in severance and excise taxes reflects a negligible decline (-$3 million) due to a lower effective tax rate and a $73 million decline due to a decline in production value.

Figure 33. Oklahoma Severance and Excise Taxes – Source of Annual Changes



Notes: Production values and taxes are calculated by fiscal year
Source: Oklahoma Tax Commission, and RegionTrack calculations

Severance Taxes Play Key Role in Budget Stabilization

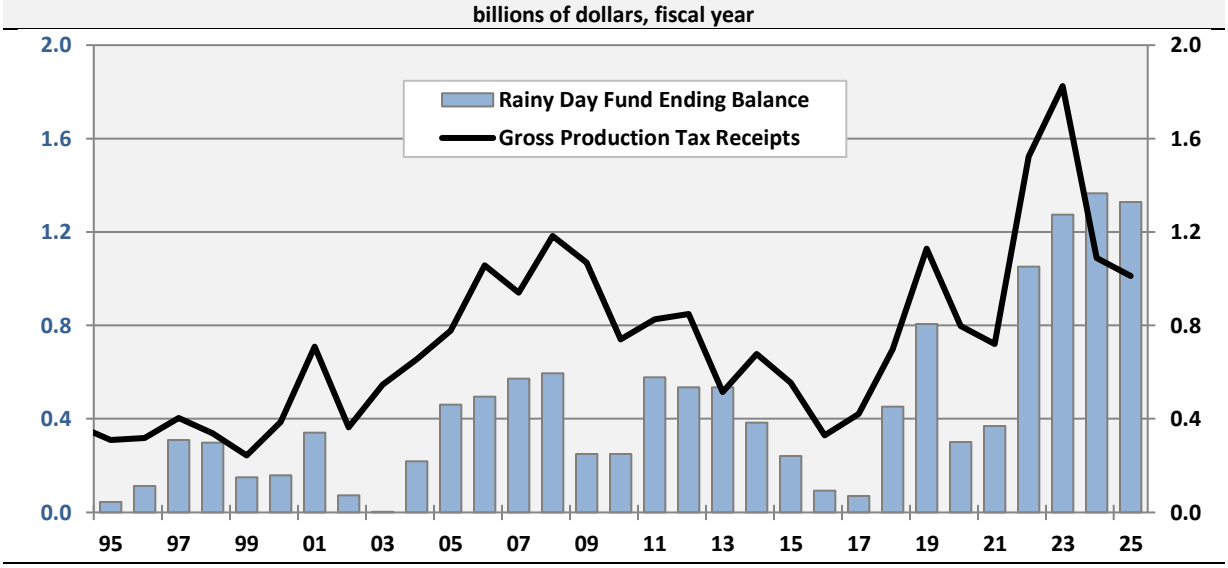
It is important to recognize the critical historical role played by severance taxes as both a buffer against recessions and an offset to the state's energy-price sensitive economic cycle. Historically, most national recessions are accompanied by elevated energy prices which tend to raise severance taxes to the state and increase the share of the state budget supported by oil and gas production.

This countercyclical budget support is evident in the 1973-75, 1980-83, 2001, and 2007-09 recessionary periods. Similar but smaller budget support is found in earlier recessions in 1954 and 1957. Continued volatility in oil and gas prices and the rising value of oil and gas production suggest that severance taxes are likely to continue to transmit volatility to state tax collections going forward.

State Budget Stabilization. Severance tax revenue has long played a key role in budget stabilization through the state's Rainy Day Fund.[17] Historically, deposits to the Fund are highly correlated with years when severance tax receipts far exceed budgeted projections. Figure 34 compares the Rainy Day Fund balance with gross production tax receipts in the FY1994 to FY2025 period. Even after refunds, gross production taxes have supported large contributions to the Fund to stabilize the state budget.

The Rainy Day Fund balance reached approximately $800 million prior to the pandemic, fueled by strong gross production tax receipts. However, during the Covid-driven recession, appropriations totaling nearly $750 million were made from the fund for spending in FY2020 and FY2021. Due, in part, to record severance tax receipts, deposits of $282 million, $575.7 million, $222.9 million, and $91.3 million were made in fiscal years FY2021 to FY2024, leaving an ending balance of $1.37 billion in FY2024. The ending balance pulled back slightly to $1.33 billion in FY2025 but has averaged $1.32 billion in ending balance for the past three fiscal years.

Figure 34. Oklahoma Rainy Day Fund Balance and Gross Tax Collections



Source: FY2025 Executive Budget for the State of Oklahoma and Oklahoma Tax Commission

Ad Valorem Tax Payments

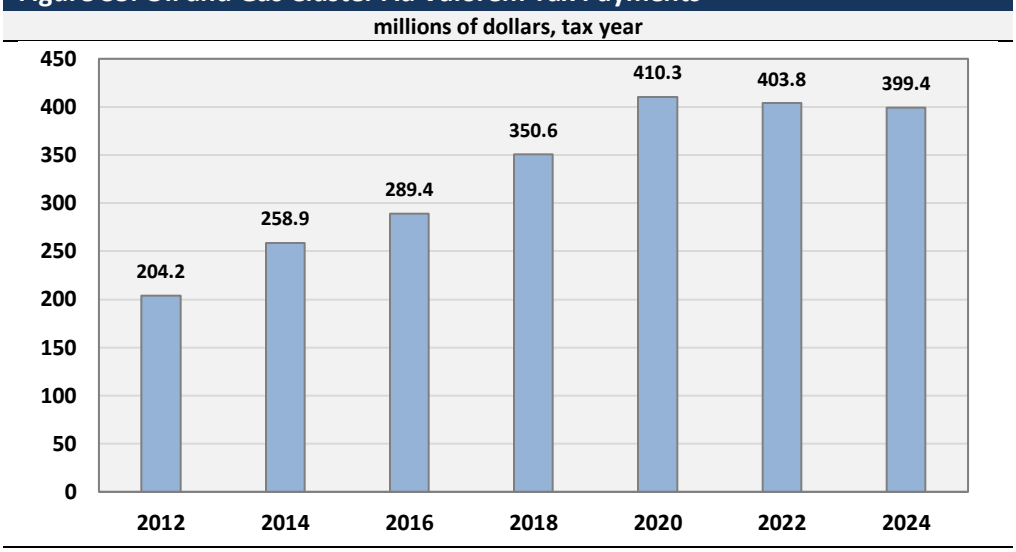
In Oklahoma, a severance tax on oil and gas production is levied in lieu of local ad valorem tax on the value of oil and gas deposits in the ground. However, local governments in the state have authority to assess ad valorem taxes on the value of other oil and gas-related equipment and infrastructure. This includes gathering lines, processing equipment, and other assets. In addition to firms in the traditional drilling and production sectors, ad valorem tax also extends to assets owned by other components of the state's oil and gas cluster, primarily pipelines and refineries.

Statewide Ad Valorem Taxes. Readily available statewide data on oil and gas-related property tax payments in Oklahoma are sparse. Statewide data are available from reports produced by the Oklahoma Tax Commission for biannual periods for tax years 2012 to 2024 based on valuations as of November 1 for the stated tax year.

For the state's oil and gas cluster, taxes on five categories of oil and gas-related property types identified in the reports are used in the analysis. These include: 1) Refineries, Gas Plants, Gathering & Compression; 2) Other Oil, Gas & Mining Property; 3) Distribution Pipeline Companies; 4) Fluid Pipeline Companies; and 5) Gas Pipeline Companies. All pipelines represent centrally assessed property managed through the Oklahoma Tax Commission. The remaining categories are taxed as business personal property.

Figure 35 illustrates local annual ad valorem tax payments made by firms in the five components of the oil and gas cluster from tax year 2012 to tax year 2024. Most recently, payments totaled $399.4 million in tax year 2024, down 1% from $403.8 million in tax year 2022. Total ad valorem taxes paid by the oil and gas cluster have averaged $404.5 million annually in the last three reported assessment periods.

Figure 35. Oil and Gas Cluster Ad Valorem Tax Payments



Notes: Estimates for each tax year above are based on assessed valuations and effective millage rates for each county. Selected sectors include Refineries, Gas Plants, Gathering & Compression; Other Oil, Gas & Mining Property; Distribution Pipeline Companies; Fluid Pipeline Companies; and Gas Pipeline Companies.
Source: Oklahoma Tax Commission - Ad Valorem Stat Book (multiple annual issues)

It is important to note that the use of these five property classes to represent the oil and gas cluster substantially understates the total property tax payments made by these firms. The total excludes buildings and other structures and all other forms of real property owned, as well as significant personal property used in the operations of oil and gas firms.

Ad Valorem Taxes by Property Type. Oil and gas cluster-related ad valorem tax payments by both asset type and county for tax year 2024 are detailed in Figure 36. The three primary components of ad valorem payments are $105.8 million for fluid pipelines; $102.3 million traced to refineries, gas plants, gathering, and compression; and $122.1 million for other oil, gas, and mining property. Distribution and gas pipelines accounted for a combined $69.1 million in tax year 2024.

Figure 36. OK Oil and Gas Cluster - Selected Ad Valorem Tax Payments (FY2024)

	Centrally Valued Property			Personal Property		
County	Distribution Pipeline Companies	Fluid Pipeline Companies	Gas Pipeline Companies	Refineries, Gas Plants, Gathering & Compression	Other Oil, Gas & Mining Property	Total Selected Ad Valorem Payments
Adair	0	0	0	0	0	0
Alfalfa	28,332	159,875	163,887	319,958	2,034,024	2,706,076
Atoka	30,745	682,134	936,948	349,474	28,036	2,027,337
Beaver	1770	781,679	1,817,825	1,568,432	29,842	4,199,548
Beckham	130,458	86,004	1,962,695	0	1230686	3,409,843
Blaine	49,189	464,151	195,146	1,467,949	9,177,936	11,354,371
Bryan	144,389	2,987,548	3,823,556	75,853	0	7,031,346
Caddo	113,230	105,699	838,673	0	7,378,066	8,435,668
Canadian	878,754	1,251,295	2,183,709	13,598,657	0	17,912,415
Carter	223,802	3,233,575	1,908,234	4,970,479	4,341,303	14,677,393
Cherokee	99	0	0	0	0	99
Choctaw	60,001	0	6,471	0	0	66,472
Cimarron	0	903,462	376,333	53,464	6,706	1,339,965
Cleveland	1,410,927	1,619,982	415,427	1,006,846	0	4,453,182
Coal	52,160	1,212,433	1,254,445	5,411,413	1,486,177	9,416,628
Comanche	640,584	28,693	111,322	0	848813	1,629,412
Cotton	23,185	161,642	19,113	0	0	203,940
Craig	38,729	256,877	48,005	0	0	343,611
Creek	667,433	2,845,256	3,641,595	0	1,387,457	8,541,741
Custer	184,532	46,011	1,083,205	5,339,550	384,168	7,037,466
Delaware	10,930	130,101	0	169	0	141,200
Dewey	828	37,257	251,452	1,945,831	1,904,342	4,139,710
Ellis	23,099	301,669	122,200	1,837,222	5,791,201	8,075,391
Garfield	335,141	2,441,922	372,286	2,244,472	837,660	6,231,481
Garvin	122,478	2,187,347	991,243	5,719,799	1,488,578	10,509,445
Grady	200,872	2,508,687	2,725,093	752,673	20,074,017	26,261,342
Grant	22,899	1,858,871	563,832	1,593,221	634,027	4,672,850
Greer	20,640	84,703	33,019	3,939	0	142,301
Harmon	31,732	66,420	186	0	0	98,338
Harper	15,712	439,725	198,764	0	585,992	1,240,193
Haskell	50,852	755,565	204,452	264,370	159,684	1,434,923
Hughes	81,071	1,144,367	1,543,400	3,949,227	1,492,842	8,210,907
Jackson	146,698	91,749	28,351	197	6535	273,530
Jefferson	34,674	1,153,078	23,845	46,127	0	1,257,724
Johnston	17,859	1,483,575	844,598	0	446,264	2,792,296
Kay	305,049	4,881,198	837,854	747	421,278	6,446,126
Kingfisher	121,901	2,717,951	1,906,013	4,793,565	8,096,928	17,636,358
Kiowa	51,312	219,899	185,022	2,248	11,488	469,969
Latimer	56,689	0	853,419	599,141	422,795	1,932,044
LeFlore	377,109	777,064	368,093	178,408	340,769	2,041,443
Lincoln	105,203	15,201,851	296,943	0	15,452,449	31,056,446
Logan	377,176	2,298,282	2,395,050	0	3071546	8,142,054
Love	23,640	456,452	91,843	942,737	158,321	1,672,993
McClain	228,399	591,711	802,524	47,209	1,424,430	3,094,273
McCurtain	79,031	0	57,477	0	0	136,508
McIntosh	61,700	420,004	43,785	88,312	315,618	929,419
Major	41,071	1,687,981	371,400	3,130,676	444,669	5,675,797
Marshall	43,756	2,932	28,631	780,161	23,950	879,430
Mayes	50,398	422,313	25,530	0	0	498,241
Murray	42,619	415,793	12,561	1,907	44,108	516,988
Muskogee	429,878	1,070,646	735,098	0	45,363	2,280,985

Figure 36. (Cont.) OK Oil and Gas Cluster - Selected Ad Valorem Tax Payments (FY2024)

	Centrally Valued Property			Personal Property		
County	Distribution Pipeline Companies	Fluid Pipeline Companies	Gas Pipeline Companies	Refineries, Gas Plants, Gathering & Compression	Other Oil, Gas & Mining Property	Total Selected Ad Valorem Payments
Noble	32,458	2,170,914	195,355	111,143	543,709	3,053,579
Nowata	24,971	31,129	52,056	90,080	8402	206,638
Okfuskee	43,885	604,337	408,704	550,345	35,703	1,642,974
Oklahoma	4,789,592	1,575,610	956,316	131,351	8,347,971	15,800,840
Okmulgee	184,288	1,117,458	487,215	466	112	1,789,539
Osage	240,818	7,894,841	483,480	460,619	211,759	9,291,517
Ottawa	108,633	589,910	47,788	0	0	746,331
Pawnee	40,929	1,318,292	93,265	14,562	20,938	1,487,986
Payne	352,790	7,477,608	108,960	13,756,133	295	21,695,786
Pittsburg	230,307	137,727	426,075	5,072,417	1,591,242	7,457,768
Pontotoc	264,410	3,125,615	727,572	4,144	247,738	4,369,479
Pottawatomie	472,850	2,311,451	234,600	0	525,926	3,544,827
Pushmataha	13,067	0	50,016	3,287	3,720	70,090
Roger Mills	11,296	57,034	296,643	0	3829441	4,194,414
Rogers	436,876	713,241	369,801	0	0	1,519,918
Seminole	130,069	2,808,216	369,517	464,049	60,095	3,831,946
Sequoyah	225,890	0	7,674	0	0	233,564
Stephens	190,538	2,063,006	728,640	0	4,209,119	7,191,303
Texas	211	84,550	574,589	1,849,143	117,457	2,625,950
Tillman	56,463	79,773	4193	0	0	140,429
Tulsa	4,809,661	5,719,427	668,854	10,340,972	4,111,699	25,650,613
Wagoner	455,954	135,952	60,952	3,228	0	656,086
Washington	303,813	1,965,875	239,702	37,252	27535	2,574,177
Washita	52,547	19,505	445,536	0	5,548,581	6,066,169
Woods	43,141	381,462	888,086	3,861,658	448,789	5,623,136
Woodward	125,480	743,919	685,319	2,486,815	171,101	4,212,634
State of Oklahoma	**$21,829,673**	**$105,802,284**	**$47,311,461**	**$102,322,095**	**$122,089,399**	**$399,354,911**

Source: Oklahoma Tax Commission - Ad Valorem Stat Book (2024)

Ad Valorem Taxes by County. Ad valorem taxes were paid by firms in the oil and gas cluster in 76 of the state's 77 counties (not Adair County).

Firms in four of these counties – Lincoln ($31.1 million), Grady ($26.3 million), Tulsa ($25.7 million), and Payne ($21.7 million) paid $20 million or more annually in oil and gas-related ad valorem tax payments. All are either traditional large oil and gas producing counties or home to refineries or pipelines (or both).

Ad valorem payments totaled $10 million or more in six additional counties – Blaine, Canadian, Carter, Garvin, Kingfisher, and Oklahoma.

Sixteen additional counties received between $5 million and $10 million in ad valorem tax payments.

Overall, a total of 45 counties received $2 million or more in ad valorem taxes from oil and gas activity and 56 counties received at least $1 million in tax year 2024.

Across all 76 counties receiving payments, the oil and gas cluster paid an average of $5.25 million per county in ad valorem payments in tax year 2024.

How are Oklahoma Oil and Gas Production Tax Revenues Used?

Over the decade ended in FY2025, the state's oil and gas sector contributed $9.47 billion in gross production tax revenue ($947 million annually) to the funding of Oklahoma state government (*Figure 37*).[18]

Gross production revenue is first apportioned by statute for several dedicated purposes, primarily local government and public education, with the remainder deposited in the general revenue fund.[19] Of the $9.47 billion in gross production revenue paid the past decade, $3.8 billion (40%) went to dedicated uses, with the remaining $5.7 billion (60%) transferred to the state's general revenue fund.

General revenue fund contributions from gross production taxes (after allocations to dedicated uses) averaged $569 million annually the past decade.

Current Tax Apportionment

Most recently, gross production taxes apportioned for budgetary use in FY2025 totaled $1.04 billion. Again, this is down substantially from a record $1.8 billion in apportioned gross production tax revenue in FY2023 and down slightly from $1.07 billion in FY2024.

Of the total $1.04 billion in apportioned gross production tax revenue in FY2025, $466.5 million was apportioned to off-the-top dedicated uses. The dedicated uses include $86.4 million returned to counties for roads, $86.4 million to local school districts, $47.1 million to the common education technical fund, $47.1 million to the higher education capital fund, $47.1 million to the Oklahoma student aid revolving fund, and $34.6 million to all other dedicated uses.

The remaining $693 million after dedicated uses was distributed to the general revenue fund in FY2025, up 14% from $608 million in FY2024. The General Revenue Fund received an average of $651 million annually in FY2024 and FY2025 and an average of $867 million annually in each of the past four fiscal years.

Education-Related Distributions

A total of $228 million in gross production tax was apportioned to education-related dedicated funds in FY2025. Recipients include both common and higher education. Over the past decade, $2.23 billion in gross production tax revenue was apportioned for educational purposes, an average of $223 million annually in the period.

Common education is the largest direct beneficiary of gross production tax revenue. Over the past decade, gross production revenue received by local school districts and the common education technical fund[20] totaled $1.34 billion, or $134 million annually. Common education's share of gross production taxes reached $133.5 million in FY2025.

Higher education remains a significant recipient as well, receiving $94.2 million in FY2025 through the higher education capital fund and the Oklahoma student aid revolving fund. Contributions of gross production taxes to higher education totaled $898 million the past decade, or $89.8 million annually.

Figure 37. Distribution of Oklahoma Gross Production Taxes (FY2015-FY2025)

Fiscal Year	Total Apportion-ment	General Revenue Fund	Dedicated Uses						Total Education-Related Distributions*
			Returned to Counties for Roads	To School Districts	Common Education Technical Fund	Higher Education Capital Fund	Oklahoma Student Aid Revolving Fund	Other*	
2015	$542,074,273	$213,359,735	$81,878,193	$81,878,193	$47,372,290	$47,372,290	$47,372,290	$22,841,282	$223,995,063
2016	319,784,759	95,011,360	55,965,659	55,965,659	33,890,977	33,890,977	33,890,977	11,169,150	157,638,590
2017	411,219,672	157,437,279	62,893,884	62,893,884	38,404,347	38,404,347	38,404,347	12,781,584	178,106,925
2018	682,072,596	353,386,508	83,861,652	83,861,652	47,371,864	47,371,864	47,371,864	18,847,192	225,977,244
2019	1,108,442,208	725,874,440	103,758,080	103,758,080	47,017,214	47,017,214	47,017,214	33,999,966	244,809,722
2020	785,072,369	469,825,178	71,370,647	71,370,647	46,938,567	46,938,567	46,938,567	31,690,196	212,186,348
2021	742,178,565	418,599,637	62,516,699	62,516,699	47,035,978	47,035,978	47,035,978	57,437,597	203,624,632
2022	1,500,357,745	1,074,723,198	123,556,991	123,556,991	47,111,046	47,111,046	47,111,046	37,187,427	264,890,129
2023	1,800,161,243	1,091,632,838	146,410,192	146,410,192	47,115,425	47,115,425	47,115,425	274,361,747	287,756,467
2024	1,074,983,725	608,481,793	89,790,677	89,790,677	47,011,011	47,011,011	47,011,011	145,887,545	230,823,710
2025	1,041,709,252	693,006,694	86,386,139	86,386,139	47,105,543	47,105,543	47,105,543	34,613,651	227,702,768
10-year Total	$9,465,982,134	$5,687,978,925	$886,510,620	$886,510,620	$449,001,972	$449,001,972	$449,001,972	$657,976,054	$2,233,516,535
10-year Average	$946,598,213	$568,797,892	$88,651,062	$88,651,062	$44,900,197	$44,900,197	$44,900,197	$65,797,605	$223,351,654

Source: Historical issues of *Apportionment of Statutory Revenues by the Oklahoma Tax Commission.*

* "Other" includes but is not limited to: Community Water Infrastructure Development Revolving Fund, Conservation Commission Infrastructure Revolving Fund, County Bridge and Road Fund, OK Water Resources Board, Tourism & Recreation Capital Expenditure Revolving Fund, and the Statewide Circuit Engineering District Revolving Fund. Funds not included here received only a one-time payment from Severance Taxes.

Figure 38. Gross Production Tax Revenue Returned to School Districts

County	FY2014	FY2015	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	FY2023	FY2024	10-Yr Avg
ADAIR	0	0	4	0	0	0	43	24	21	0	0	8
ALFALFA	3,737,264	6,675,851	4,415,648	4,753,655	4,189,147	3,705,625	1,677,233	865,344	1,999,391	2,469,090	1,318,491	3,255,158
ATOKA	153,328	130,222	92,847	110,791	107,118	115,695	91,700	112,532	225,175	233,214	135,194	137,074
BEAVER	2,151,798	1,643,232	723,908	629,900	628,172	720,644	361,649	262,439	552,894	699,143	374,068	795,259
BECKHAM	1,781,381	2,243,343	1,505,923	1,351,987	1,171,866	1,254,748	621,607	431,055	760,302	893,034	406,735	1,129,271
BLAINE	1,785,561	1,252,261	680,358	1,311,146	4,645,585	10,772,602	8,354,138	6,303,688	8,657,808	10,460,793	6,851,437	5,552,307
BRYAN	95,655	78,492	42,156	33,957	48,319	60,447	31,651	52,875	40,162	131,034	28,593	58,486
CADDO	1,764,750	1,520,317	907,452	966,132	1,115,978	1,182,512	791,445	600,724	1,487,991	1,951,566	1,093,925	1,216,617
CANADIAN	4,155,784	4,940,761	3,649,425	4,211,583	7,258,212	10,069,211	7,559,656	5,880,189	13,238,779	18,139,530	11,694,967	8,254,372
CARTER	5,665,667	4,888,488	3,635,591	2,441,572	2,964,337	3,824,650	2,475,133	1,559,204	3,263,473	5,737,108	3,652,551	3,646,161
CHEROKEE	0	0	0	0	0	60	0	0	0	0	0	5
CHOCTAW	0	0	0	0	0	0	0	0	0	0	0	0
CIMARRON	59,823	74,699	65,155	70,075	74,718	76,363	47,186	21,309	36,773	47,884	35,929	55,447
CLEVELAND	259,126	205,330	121,629	121,614	139,537	144,623	101,597	56,601	124,962	164,936	129,110	142,642
COAL	1,280,895	1,097,825	940,992	1,092,211	1,259,411	1,172,996	609,618	814,931	1,449,107	1,851,005	871,657	1,130,968
COMANCHE	86,526	62,250	33,565	30,983	36,536	34,631	21,599	11,187	25,580	33,286	24,117	36,387
COTTON	78,413	54,373	26,751	22,434	24,276	28,127	20,848	8,872	19,147	25,736	19,864	29,895
CRAIG	2,837	2,208	1,183	1,825	1,138	672	333	743	2,358	3,478	2,053	1,712
CREEK	1,041,695	865,392	559,952	541,782	615,499	716,920	578,372	266,723	627,900	838,794	592,734	658,706
CUSTER	889,602	829,663	517,971	594,576	985,927	1,450,722	994,610	1,248,896	2,774,880	2,757,598	1,535,635	1,325,462
DELAWARE	43	173	95	0	393	0	0	0	0	0	0	64
DEWEY	1,999,118	1,773,299	930,933	1,100,734	1,684,940	2,853,213	2,356,165	1,258,745	2,060,455	2,888,371	1,819,467	1,884,131
ELLIS	3,918,098	3,579,806	1,820,449	1,941,727	2,136,857	2,578,559	2,167,248	1,426,542	2,586,565	3,325,291	2,453,782	2,539,539
GARFIELD	943,272	1,355,773	1,630,831	1,783,840	1,550,454	1,604,632	1,264,366	673,448	1,144,343	1,472,653	708,184	1,284,709
GARVIN	2,715,211	3,061,771	1,958,364	2,373,972	2,957,959	4,219,971	3,481,982	3,330,331	6,888,333	7,544,831	5,084,345	3,965,188
GRADY	3,405,966	4,384,743	3,893,360	4,911,477	8,417,367	11,126,461	8,919,201	8,874,688	18,703,928	25,053,553	13,750,846	10,131,054
GRANT	2,030,543	2,412,169	1,125,695	859,422	672,844	652,273	305,712	176,351	294,727	367,313	217,046	828,554
GREER	1,882	1,419	989	864	2,291	2,714	910	427	1,287	1,702	779	1,388
HARMON	1,517	1,329	568	483	751	823	631	299	1,033	1,130	731	845
HARPER	568,348	429,364	304,393	219,912	240,808	250,513	114,490	107,363	228,902	295,100	143,311	263,864
HASKELL	153,834	117,807	61,382	115,650	109,071	106,456	48,844	101,464	205,245	192,539	92,706	118,636
HUGHES	849,219	701,956	742,177	1,020,270	1,312,273	1,912,580	1,302,193	1,354,554	2,825,717	3,716,453	1,594,019	1,575,583
JACKSON	125,034	108,221	63,740	34,482	43,668	35,228	25,061	7,535	18,046	30,618	20,481	46,556
JEFFERSON	256,430	124,358	22,020	33,632	39,154	52,054	55,158	37,226	63,791	69,695	51,017	73,140
JOHNSTON	278,385	354,839	315,043	255,799	284,619	329,412	492,568	244,115	543,826	711,015	451,398	387,365
KAY	923,799	1,047,164	825,443	494,490	450,751	422,071	262,247	134,829	301,418	376,878	231,680	497,343
KINGFISHER	1,190,708	1,874,411	1,871,157	4,256,329	9,545,509	13,572,427	13,046,798	7,510,597	14,833,099	21,115,375	11,817,706	9,148,556
KIOWA	33,769	24,945	19,660	19,469	28,215	19,077	10,423	10,094	29,485	21,064	11,324	20,684
LATIMER	773,336	311,814	263,635	452,560	519,815	309,801	232,241	345,804	861,608	737,444	354,628	469,335

Continued

Figure 38. (Cont.) Gross Production Tax Revenue Returned to School Districts

County	FY2014	FY2015	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	FY2023	FY2024	10-Yr Avg
LE FLORE	254,881	159,348	74,810	171,403	183,300	144,453	74,821	117,383	252,657	241,877	110,976	162,355
LINCOLN	816,076	517,498	511,173	629,477	764,139	719,233	375,734	259,216	512,563	668,234	347,694	556,458
LOGAN	834,859	1,928,341	1,468,921	748,259	1,178,218	1,100,342	844,031	473,144	888,540	1,128,507	643,561	1,021,520
LOVE	631,590	450,998	357,391	840,944	1,076,173	1,039,088	862,411	478,116	1,133,518	2,060,288	1,780,105	973,693
MAJOR	1,426,478	1,241,155	713,755	642,011	1,002,938	1,775,949	1,499,991	1,100,353	1,797,806	2,204,098	1,484,687	1,353,566
MARSHALL	690,129	790,834	532,368	394,431	492,489	604,118	287,422	290,219	796,064	935,583	368,299	561,996
MAYES	2,209	1,451	754	5,424	4,977	5,038	3,750	1,354	3,440	3,811	1,369	3,052
MCCLAIN	1,087,165	841,289	569,802	528,141	1,025,035	1,643,191	2,328,032	1,625,318	3,710,110	4,772,496	3,261,593	1,944,743
MCCURTAIN	0	0	0	0	0	0	0	0	0	0	0	0
MCINTOSH	37,660	28,384	15,218	26,184	23,085	21,544	16,504	165,105	311,412	269,230	103,779	92,555
MURRAY	142,269	98,378	42,630	50,320	60,887	77,977	48,599	26,623	46,744	72,766	103,143	70,031
MUSKOGEE	32,287	25,780	9,811	15,356	20,620	15,983	10,021	5,423	11,382	14,318	10,498	15,589
NOBLE	1,010,959	1,181,970	878,254	391,166	483,759	413,884	331,849	168,710	363,126	501,752	347,167	552,054
NOWATA	151,457	60,378	50,629	65,324	53,106	48,988	32,608	20,104	29,993	35,886	24,347	52,074
OKFUSKEE	293,464	288,259	181,914	174,142	181,331	175,774	130,075	128,291	243,669	270,339	137,123	200,398
OKLAHOMA	1,298,260	1,243,317	714,323	762,404	865,854	856,085	640,342	566,014	1,266,237	1,675,477	1,062,867	995,562
OKMULGEE	169,518	161,138	79,193	83,486	105,794	116,554	80,690	38,808	73,715	125,053	80,235	101,289
OSAGE	1,674,914	927,242	536,404	770,994	796,678	1,046,438	670,855	398,191	885,496	1,356,669	963,358	911,567
OTTAWA	0	0	0	0	0	0	0	0	0	0	0	0
PAWNEE	435,824	365,755	166,718	173,099	162,630	233,784	150,967	74,353	163,018	213,722	141,658	207,412
PAYNE	749,948	1,559,140	1,203,840	770,496	1,008,185	776,276	514,868	215,244	384,697	565,662	362,614	737,361
PITTSBURG	2,048,865	1,610,941	1,073,776	1,435,756	1,596,083	1,336,612	917,616	1,133,205	2,022,307	2,477,230	1,707,884	1,578,207
PONTOTOC	1,313,868	1,378,858	698,472	509,936	660,924	723,786	600,091	270,686	628,495	881,937	631,054	754,373
POTTAWATOMIE	749,400	757,488	404,091	285,668	371,754	370,286	307,118	154,962	347,650	463,410	319,701	411,957
PUSHMATAHA	40,758	43,693	19,682	26,053	39,165	39,022	17,867	13,645	47,657	55,079	24,798	33,402
ROGER MILLS	4,037,314	4,650,795	2,808,447	2,295,090	2,383,313	2,472,974	1,308,947	877,871	1,837,027	2,141,495	1,143,752	2,359,730
ROGERS	30,632	14,264	9,318	11,371	11,004	10,724	5,465	3,798	6,319	7,357	3,612	10,351
SEMINOLE	1,453,713	1,171,253	779,374	705,342	797,917	788,714	617,486	351,073	709,142	918,211	566,545	805,343
SEQUOYAH	17,000	11,996	10,591	16,200	13,130	12,549	5,462	8,112	21,249	19,249	7,470	13,001
STEPHENS	3,508,388	4,232,663	3,806,159	3,717,711	4,749,720	5,614,464	3,236,853	2,459,712	6,394,333	8,185,625	4,250,265	4,559,627
TEXAS	1,599,903	1,069,640	669,419	1,162,719	1,153,518	1,231,840	668,255	431,511	1,018,696	1,341,729	713,496	1,005,520
TILLMAN	228,010	182,442	59,435	38,295	43,284	64,394	39,963	16,742	42,248	48,404	36,860	72,734
TULSA	944,567	408,454	241,427	359,497	373,511	488,565	305,342	173,527	393,836	624,810	431,591	431,375
WAGONER	31,088	34,271	18,109	13,953	13,142	13,588	6,871	2,352	2,955	3,474	3,710	13,047
WASHINGTON	183,097	70,409	50,804	80,899	76,587	92,671	54,971	30,765	58,879	77,423	54,243	75,523
WASHITA	2,730,115	2,527,183	1,266,496	1,044,176	1,063,382	857,452	473,414	517,385	984,698	1,188,321	508,829	1,196,495
WOODS	3,460,533	5,120,367	2,788,893	3,163,986	3,094,947	2,680,414	1,376,998	723,162	1,621,643	1,948,332	1,034,565	2,455,804
WOODWARD	460,027	491,661	297,811	264,761	412,473	609,108	391,835	191,430	301,984	510,032	237,450	378,961
Statewide	$79,735,839	$83,877,100	$56,880,656	$60,535,813	$81,606,568	$103,601,37	$77,662,782	$57,603,655	$116,191,81	$152,366,13	$90,581,406	$87,331,195

Source: Oklahoma State Department of Education – Oklahoma Cost Accounting System

Gross Production Tax Distribution by Region. A portion of the gross production tax generated from oil and gas production within each county is allocated back to independent school districts based on an average daily attendance basis. Figure 38 provides a county-level breakdown of severance taxes distributed to school districts statewide in the FY2014 to FY2024 period.

County-Level Distributions. Total payments declined to $90.6 million in FY2024, down 40% from a record $152.4 million in FY2023. School districts in 71 of the state's 77 counties received gross production tax payments (*Figure 38*). The remaining six counties had no oil and gas production in the period (Adair, Cherokee, Choctaw, Delaware, McCurtain, and Ottawa).

Since some counties have large amounts of oil and gas production and others very little, there is substantial variation in the revenues received. Payments in FY2024 exceeded $5 million in five counties – Grady ($13.8 million), Kingfisher ($11.8 million), Canadian ($11.7 million), Blaine ($6.9 million), and Garvin ($5.1 million). All five counties are traditionally large oil and gas producers.

School districts in 15 additional counties received distributions ranging from $1 million to $5. In total, school districts in 20 counties received at least $1 million or more from oil and gas severance taxes in FY2024.

School districts in 21 counties received less than $100,000 in gross production revenue in FY2024. Historically, these counties are home to very little crude oil and natural gas production.

Gross production taxes paid in FY2024 were laregely concentrated outside the three largest counties in the state – Oklahoma ($1.06 million), Tulsa ($432,000), and Cleveland ($129,000).

School District-Level Distributions. Gross production tax payments received by individual school districts the past decade are detailed in Figure 39. Larger school districts located in traditional oil and gas producing regions of the state tend to receive the largest distributions. The Mustang district in Canadian County received the largest distribution of $5 million in FY2024.

Eight additional districts received more than $2 million in gross production revenue in FY2024 – Kingfisher ($4.2 million), Chickasha ($3.6 million), Yukon ($3.5 million), Tuttle ($3.2 million), Watonga ($3.1 million), Bridge Creek ($2.9 million), Hennessy ($2.7 million), and Cashion ($2.3 million). An additional 12 districts received between $1 million and $2 million in gross production payments. In total, 21 districts received $1 million or more in FY2024.

Twenty-nine additional districts received between $500,000 and $1 million annually in the period. Twenty-two districts received between $250,000 and $500,000.

Fifty-seven districts received between $100,000 and $250,000 in FY2024. Fifty-one districts received between $50,000 and $100,000.

In total, 387 school districts in Oklahoma received some gross production revenue, while 180 districts received $50,000 or more in FY2024. The average payment across all districts that received a payment in the period was $234,060.

The state's charter schools do not share in school district distributions of gross production tax revenue.

Figure 39. Gross Production Tax Distributions by County/School District

County	School District	FY2014	FY2015	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	FY2023	FY2024	10-Yr Avg
Adair	Cave Springs	0	0	0	0	0	0	3	1	0	0	0	0
Adair	Dahlonegah	0	0	0	0	0	0	0	0	0	0	0	0
Adair	Stilwell	0	0	2	0	0	0	19	11	21	0	0	5
Adair	Watts	0	0	1	0	0	0	4	2	0	0	0	1
Adair	Westville	0	0	2	0	0	0	17	10	0	0	0	3
Alfalfa	Burlington	782,657	1,252,508	830,532	947,167	872,314	705,228	278,521	138,256	325,119	403,402	221,922	614,330
Alfalfa	Cherokee	1,711,859	3,134,063	2,076,783	2,302,327	1,999,822	1,774,902	825,341	435,194	1,043,251	1,252,872	659,494	1,565,083
Alfalfa	Timberlake	1,242,748	2,289,280	1,508,332	1,504,161	1,317,011	1,225,494	573,371	291,895	631,022	812,816	437,074	1,075,746
Atoka	Atoka	71,453	60,667	44,555	55,237	53,675	56,398	44,663	54,444	105,555	108,439	62,183	65,206
Atoka	Caney	21,987	18,815	12,844	15,246	13,777	15,299	12,132	15,991	33,387	33,696	18,776	19,268
Atoka	Stringtown	19,603	17,993	12,981	14,887	14,336	14,964	11,918	14,299	28,823	30,529	18,405	18,067
Atoka	Tushka	40,285	32,747	22,468	25,421	25,329	29,035	22,988	27,798	57,411	60,550	35,830	34,533
Beaver	Balko	320,259	232,112	102,068	89,990	90,859	103,629	52,436	38,413	83,868	108,489	59,386	116,501
Beaver	Beaver	688,962	549,383	247,967	203,747	206,342	228,468	108,200	75,881	164,185	207,407	105,318	253,260
Beaver	Forgan	337,687	227,332	93,519	88,554	84,909	96,397	47,267	34,237	72,396	83,940	43,839	110,007
Beaver	Turpin	804,889	634,405	280,354	247,610	246,062	292,149	153,746	113,908	232,444	299,306	165,525	315,491
Beckham	Elk City	1,042,960	1,281,889	835,794	728,343	626,939	680,256	339,911	238,953	406,702	478,598	221,144	625,590
Beckham	Erick	120,302	145,449	95,611	94,230	79,316	81,689	38,390	24,845	45,662	48,736	22,091	72,393
Beckham	Merritt	295,290	397,510	288,648	272,778	242,516	259,123	128,185	89,586	173,176	199,330	87,670	221,256
Beckham	Sayre	322,828	418,495	285,869	256,636	223,095	233,680	115,121	77,671	134,761	166,369	75,831	210,033
Blaine	Canton	355,450	250,530	141,602	269,115	959,232	2,152,545	1,674,830	1,249,341	1,707,645	2,132,221	1,425,439	1,119,814
Blaine	Geary	384,560	267,420	144,527	269,315	919,831	2,028,225	1,633,705	1,156,289	1,572,207	1,706,491	1,020,503	1,009,370
Blaine	Okeene	300,736	214,506	117,678	228,614	871,190	2,038,810	1,611,673	1,183,095	1,687,954	2,092,595	1,354,105	1,063,723
Blaine	Watonga	744,815	519,806	276,551	544,101	1,895,332	4,553,021	3,433,931	2,714,963	3,690,003	4,529,486	3,051,389	2,359,400
Bryan	Achille	4,097	3,250	1,699	1,412	2,132	2,744	1,330	994	1,661	2,292	1,078	2,063
Bryan	Bennington	3,471	2,909	1,631	1,338	2,042	2,686	1,353	927	1,597	2,356	1,019	1,939
Bryan	Caddo	6,266	4,975	2,618	2,169	3,122	3,907	2,044	1,504	2,709	3,810	1,787	3,174
Bryan	Calera	8,336	6,976	3,871	3,128	4,683	5,909	3,106	2,320	4,414	78,346	2,918	11,273
Bryan	Colbert	11,452	9,319	4,648	3,653	5,147	6,175	3,089	31,752	3,807	5,592	2,580	7,929
Bryan	Durant	44,962	37,246	20,159	16,328	22,725	28,465	14,973	11,127	18,441	27,232	13,397	23,187
Bryan	Rock Creek	6,295	5,109	2,716	2,086	2,956	3,752	2,022	1,364	2,418	3,602	1,778	3,100
Bryan	Silo	10,776	8,707	4,813	3,844	5,512	6,809	3,734	2,887	5,114	7,803	4,036	5,821
Caddo	Anadarko	575,733	490,078	288,794	298,251	337,765	350,281	228,042	173,042	412,648	529,737	300,972	362,304
Caddo	Binger-Oney	109,128	101,398	60,929	59,823	66,188	70,298	48,030	37,159	94,177	115,347	61,336	74,892
Caddo	Boone-Apache	165,391	150,332	90,423	94,104	108,190	122,900	82,391	61,884	148,282	191,587	111,472	120,633
Caddo	Carnegie	170,794	145,503	87,552	94,058	111,447	117,761	78,504	59,324	149,932	196,570	110,418	120,170
Caddo	Cement	76,535	62,062	35,991	41,458	45,371	50,692	33,290	23,312	59,784	78,688	41,930	49,919
Caddo	Cyril	100,561	88,418	57,482	62,826	73,593	73,918	50,458	37,954	102,839	138,623	77,874	78,595
Caddo	Fort Cobb-Broxton	104,941	85,479	50,403	55,888	64,617	66,989	46,171	36,701	84,647	113,691	62,213	70,158
Caddo	Gracemont	44,189	38,423	22,784	24,047	31,702	34,613	21,334	13,566	37,874	47,596	26,602	31,157
Caddo	Hinton	204,242	177,059	105,687	117,632	137,499	156,431	106,266	79,921	201,265	273,936	158,582	156,229
Caddo	Hydro-Eakly	140,094	113,882	65,950	74,083	87,830	87,503	62,997	51,685	130,730	178,680	102,325	99,614
Caddo	Lookeba Sickles	73,142	67,681	41,456	43,961	51,775	51,125	33,962	26,176	65,814	87,112	40,201	52,946
Canadian	Calumet	56,298	59,673	41,066	43,755	67,960	94,544	68,459	58,621	136,794	175,972	104,703	82,531
Canadian	El Reno	439,575	494,601	370,168	430,547	729,604	1,004,746	751,300	580,458	1,265,194	1,705,077	1,083,430	804,973
Canadian	Mustang	1,676,378	2,009,382	1,505,389	1,743,160	2,992,039	4,150,637	3,145,632	2,458,401	5,508,995	7,718,070	4,969,241	3,443,393
Canadian	Piedmont	546,680	663,684	500,233	593,648	1,051,638	1,505,122	1,153,115	919,696	2,141,840	2,950,615	1,911,799	1,267,097
Canadian	Union City	51,713	60,677	43,302	48,421	86,157	119,497	84,370	64,148	142,050	174,115	111,578	89,639
Canadian	Yukon	1,385,140	1,652,744	1,189,267	1,352,053	2,330,813	3,194,664	2,356,780	1,798,866	4,043,906	5,415,681	3,514,216	2,566,739
Carter	Ardmore	1,937,201	1,672,348	1,248,995	817,692	973,629	1,234,276	814,619	511,408	1,051,126	1,774,367	1,110,077	1,195,067

Figure 39. (Cont.) Gross Production Tax Distributions by County/School District

County	School District	FY2014	FY2015	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	FY2023	FY2024	10-Yr Avg
Carter	Dickson	831,107	725,584	534,264	368,660	451,951	598,344	386,566	242,082	528,253	939,377	592,212	563,491
Carter	Fox	190,584	170,950	128,591	83,244	103,892	134,302	80,061	44,874	84,490	138,423	79,900	112,665
Carter	Healdton	337,362	300,088	212,069	141,040	178,238	224,217	141,725	92,061	196,420	352,647	219,196	217,733
Carter	Lone Grove	959,732	800,986	606,420	412,314	492,972	656,567	420,069	266,698	557,131	984,253	653,310	619,132
Carter	Plainview	952,951	825,058	624,343	427,626	533,896	691,869	448,200	284,100	594,813	1,076,255	688,965	649,825
Carter	Springer	147,016	118,285	83,727	59,924	78,403	104,412	69,116	39,033	80,912	158,389	100,412	94,512
Carter	Wilson	309,714	275,189	197,182	131,072	151,357	180,663	114,777	78,949	170,328	313,396	208,478	193,737
Cherokee	Hulbert	0	0	0	0	0	7	0	0	0	0	0	1
Cherokee	Keys	0	0	0	0	0	10	0	0	0	0	0	1
Cherokee	Shady Grove	0	0	0	0	0	0	0	0	0	0	0	0
Cherokee	Tahlequah	0	0	0	0	0	43	0	0	0	0	0	4
Cimarron	Boise City	38,783	48,151	42,000	43,221	43,893	49,585	33,942	16,712	29,585	38,345	27,739	37,450
Cimarron	Felt	11,841	14,805	12,210	14,301	17,039	16,447	9,788	4,598	7,189	9,539	8,190	11,450
Cimarron	Keyes	9,198	11,743	10,945	12,553	13,786	10,331	3,456	0	0	0	0	6,547
Cleveland	Lexington	6,559	5,331	3,179	3,008	3,334	3,273	2,372	1,221	2,753	3,737	2,799	3,415
Cleveland	Little Axe	6,915	5,774	3,417	3,342	3,788	4,100	3,022	1,524	3,217	4,368	3,314	3,889
Cleveland	Moore	138,113	110,612	65,379	64,250	73,753	77,643	57,567	29,572	67,354	91,393	69,617	76,841
Cleveland	Noble	16,770	13,541	7,913	7,601	8,606	8,886	6,342	3,286	7,896	10,908	8,397	9,104
Cleveland	Norman	90,768	70,072	41,741	43,413	50,056	50,722	32,294	20,999	43,742	54,530	44,983	49,393
Coal	Coalgate	952,521	803,163	691,230	794,672	910,515	847,382	446,077	597,053	1,065,122	1,358,270	660,604	829,692
Coal	Olney	0	0	0	0	0	0	0	0	0	0	0	0
Coal	Tupelo	328,374	294,662	249,762	297,539	348,895	325,615	163,542	217,879	383,986	492,735	211,053	301,276
Comanche	Cache	7,947	5,416	3,005	2,851	3,536	3,519	2,229	1,190	2,678	3,528	2,504	3,491
Comanche	Chattanooga	1,134	700	365	343	431	409	275	138	318	388	281	435
Comanche	Elgin	9,153	6,300	3,549	3,420	4,160	4,088	2,598	1,271	3,129	4,165	3,001	4,076
Comanche	Fletcher	2,024	1,440	773	726	810	789	491	278	664	849	570	856
Comanche	Geronimo	1,499	1,071	552	495	591	600	361	188	428	583	409	616
Comanche	Indiahoma	997	645	358	330	362	352	238	117	263	352	230	386
Comanche	Lawton	61,848	45,398	24,287	22,187	25,928	24,177	14,976	7,797	17,620	22,848	16,729	25,800
Comanche	Sterling	1,923	1,280	675	630	718	697	430	207	479	573	392	728
Cotton	Big Pasture	14,603	10,528	4,954	4,146	4,645	5,463	4,089	1,680	3,731	4,987	3,964	5,708
Cotton	Temple	13,086	8,135	4,184	3,731	4,391	5,147	3,652	1,600	3,748	5,181	3,680	5,139
Cotton	Walters	50,723	35,711	17,614	14,557	15,241	17,517	13,107	5,592	11,668	15,567	12,220	19,047
Craig	Bluejacket	230	164	85	148	91	54	27	64	213	324	177	143
Craig	Ketchum	607	500	266	405	261	160	83	183	586	843	497	399
Craig	Vinita	1,631	1,279	688	1,038	647	371	185	411	1,263	1,872	1,127	956
Craig	Welch	368	266	145	233	139	86	38	85	296	439	253	213
Craig	White Oak	0	0	0	0	0	0	0	0	0	0	0	0
Creek	Bristow	158,775	131,755	85,117	85,318	98,034	114,669	91,330	44,436	104,573	135,978	95,840	104,166
Creek	Depew	37,494	30,821	18,945	18,135	21,643	24,781	19,840	9,454	21,989	29,401	21,279	23,071
Creek	Drumright	56,170	46,809	29,332	27,143	28,845	36,538	45,341	11,963	25,619	34,096	24,782	33,331
Creek	Kellyville	104,191	85,755	54,302	50,816	55,153	61,768	46,357	21,406	48,128	64,151	45,901	57,993
Creek	Kiefer	58,594	51,814	35,296	35,661	43,393	53,948	45,672	23,400	54,332	74,505	54,431	48,277
Creek	Mannford	138,144	118,224	77,675	76,605	85,074	96,630	76,204	36,940	88,227	118,550	84,737	90,637
Creek	Mounds	54,982	46,242	28,800	28,004	31,920	39,549	30,573	14,676	37,009	48,345	33,298	35,763
Creek	Oilton	27,165	20,313	13,547	13,818	15,937	18,097	13,921	6,306	15,639	22,194	15,202	16,558
Creek	Olive	35,641	29,661	18,524	17,067	19,830	22,026	14,865	6,691	15,745	20,037	13,297	19,399
Creek	Sapulpa	370,540	303,998	198,415	189,215	215,670	248,914	194,268	91,449	216,640	291,536	203,967	229,510
Custer	Arapaho	0	0	0	0	0	0	0	0	0	0	0	0
Custer	Arapaho-Butler	64,770	61,704	38,237	47,733	83,742	126,011	85,755	109,618	262,862	256,231	139,711	116,034

Figure 39. (Cont.) Gross Production Tax Distributions by County/School District

County	School District	FY2014	FY2015	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	FY2023	FY2024	10-Yr Avg
Custer	Butler	0	0	0	0	0	0	0	0	0	0	0	0
Custer	Clinton	389,469	358,965	219,591	248,584	401,672	583,011	392,987	486,977	1,091,815	1,069,901	581,341	529,483
Custer	Thomas-Fay-Custer Unified Dist	81,585	73,654	46,801	51,762	89,631	135,309	89,015	107,637	261,018	250,539	137,421	120,397
Custer	Weatherford	353,779	335,340	213,342	246,498	410,881	606,391	426,853	544,664	1,159,183	1,180,927	677,162	559,547
Delaware	Colcord	5	17	10	0	39	0	0	0	0	0	0	6
Delaware	Grove	18	73	41	0	167	0	0	0	0	0	0	27
Delaware	Jay	12	50	25	0	111	0	0	0	0	0	0	18
Delaware	Kansas	6	26	15	0	60	0	0	0	0	0	0	10
Delaware	Oaks-Mission	2	7	4	0	16	0	0	0	0	0	0	3
Dewey	Seiling	1,003,402	893,240	480,027	553,990	873,555	1,459,958	1,247,596	667,479	1,071,031	1,517,457	953,231	974,633
Dewey	Taloga	179,398	145,694	80,455	126,016	167,048	334,359	271,387	132,139	244,346	339,607	225,257	204,155
Dewey	Vici	816,317	734,365	370,451	420,728	644,337	1,058,896	837,183	459,127	745,078	1,031,306	640,978	705,342
Ellis	Arnett	921,882	806,414	442,310	489,587	537,569	591,471	483,131	313,266	549,288	725,614	533,719	581,295
Ellis	Fargo	947,555	860,587	435,816	630,656	626,885	774,282	631,934	445,236	780,410	981,418	723,073	712,532
Ellis	Gage	422,503	374,037	150,304	0	0	0	0	0	0	0	0	86,077
Ellis	Shattuck	1,626,158	1,538,767	792,019	821,484	972,404	1,212,806	1,052,183	668,040	1,256,866	1,618,258	1,196,991	1,159,634
Garfield	Chisholm	84,212	122,074	152,732	165,720	154,219	165,952	136,100	71,583	123,699	153,583	72,798	127,516
Garfield	Covington-Douglas	24,904	34,946	40,314	43,292	38,151	40,904	33,359	16,608	29,014	36,457	16,460	32,219
Garfield	Drummond	29,427	41,562	47,157	49,577	47,890	50,527	40,201	21,687	38,667	52,035	25,221	40,359
Garfield	Enid	661,586	953,881	1,152,354	1,259,820	1,079,476	1,111,362	871,346	466,501	785,799	1,014,597	490,926	895,241
Garfield	Garber	33,188	45,170	55,262	59,743	51,236	52,602	43,790	24,090	43,139	58,132	28,681	45,003
Garfield	Kremlin-Hillsdale	29,342	39,359	43,994	50,408	42,123	43,825	33,526	17,277	31,137	40,507	18,482	35,453
Garfield	Pioneer-Pleasant Vale	50,269	71,785	80,493	88,362	75,817	76,614	58,215	30,954	50,165	64,225	30,875	61,616
Garfield	Waukomis	30,344	46,995	58,525	66,917	61,543	62,846	47,829	24,749	42,723	53,118	24,742	47,303
Garvin	Elmore City-Pernell	273,734	305,144	188,712	237,108	304,806	430,280	355,007	349,656	740,674	785,080	519,479	408,153
Garvin	Lindsay	646,313	738,902	481,845	579,571	719,895	1,029,406	868,629	840,398	1,740,771	1,831,359	1,241,274	974,397
Garvin	Maysville	204,481	223,155	139,153	158,749	194,346	266,374	224,195	218,018	429,943	493,033	325,476	261,538
Garvin	Paoli	134,576	158,755	98,226	116,467	155,450	206,904	162,360	146,809	307,126	313,235	178,769	179,880
Garvin	Pauls Valley	707,136	789,607	506,609	622,294	763,632	1,152,781	923,224	861,709	1,780,982	2,092,387	1,446,681	1,058,822
Garvin	Stratford	364,983	418,404	273,360	331,737	410,904	552,256	456,298	439,005	906,181	990,976	663,057	527,924
Garvin	Wynnewood	383,988	427,803	270,458	328,047	408,925	581,970	492,269	474,737	982,656	1,038,761	709,609	554,475
Grady	Alex	125,507	164,361	141,042	182,420	308,923	420,005	337,911	334,382	674,573	877,271	484,661	368,278
Grady	Amber-Pocasset	195,029	257,155	223,193	274,681	478,022	646,633	533,724	518,470	1,030,721	1,310,558	671,110	558,118
Grady	Bridge Creek	586,042	753,462	681,203	871,120	1,552,787	2,083,555	1,748,174	1,784,256	3,961,724	5,319,543	2,902,479	2,022,213
Grady	Chickasha	990,323	1,254,293	1,109,739	1,379,966	2,302,247	2,955,046	2,283,497	2,228,880	4,618,502	6,456,529	3,551,666	2,648,244
Grady	Minco	231,409	307,952	268,206	328,151	577,413	773,932	600,672	580,554	1,210,832	1,653,280	909,502	676,537
Grady	Ninnekah	204,357	274,353	249,287	312,401	522,423	695,832	544,675	551,813	1,192,853	1,356,931	721,275	602,382
Grady	Rush Springs	241,613	308,372	259,469	329,930	530,737	690,265	538,303	528,913	1,046,590	1,368,230	768,715	601,012
Grady	Tuttle	723,587	932,217	840,941	1,076,910	1,882,956	2,506,779	2,031,606	2,047,452	4,297,264	5,795,949	3,181,488	2,301,559
Grady	Verden	108,098	132,579	120,281	155,898	261,859	354,415	300,639	299,969	670,869	915,262	559,951	352,711
Grant	Deer Creek-Lamont	459,856	524,299	250,133	193,062	151,186	147,701	64,371	32,867	55,175	61,404	35,655	179,610
Grant	Medford	763,590	885,819	391,832	293,665	239,222	230,158	108,299	64,979	109,289	148,513	90,313	302,334
Grant	Pond Creek-Hunter	807,097	1,002,050	483,731	372,694	282,436	274,414	133,042	78,505	130,263	157,396	91,078	346,610
Grant	Wakita	0	0	0	0	0	0	0	0	0	0	0	0
Greer	Granite	502	397	287	235	596	666	224	104	323	473	219	366
Greer	Mangum	1,380	1,022	702	628	1,696	2,047	687	323	964	1,229	560	1,022
Harmon	Hollis	1,517	1,329	568	483	751	823	631	299	1,033	1,130	731	845
Harper	Buffalo	218,472	168,222	111,546	78,626	89,288	94,715	44,836	40,760	89,566	109,262	52,312	99,782
Harper	Laverne	349,875	261,142	192,847	141,286	151,520	155,799	69,655	66,603	139,336	185,837	91,000	164,082
Haskell	Keota	31,083	22,711	11,664	23,091	20,296	20,050	9,200	20,312	41,940	39,118	18,866	23,485

Figure 39. (Cont.) Gross Production Tax Distributions by County/School District

County	School District	FY2014	FY2015	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	FY2023	FY2024	10-Yr Avg
Haskell	Kinta	14,013	10,284	5,435	10,659	9,575	10,277	4,832	9,923	19,368	16,906	7,822	10,827
Haskell	Mccurtain	16,147	12,933	6,419	11,872	11,402	11,403	4,989	10,028	22,150	21,848	10,947	12,740
Haskell	Stigler	92,591	71,879	37,864	70,028	67,799	64,726	29,823	61,201	121,787	114,667	55,072	71,585
Haskell	Whitefield	0	0	0	0	0	0	0	0	0	0	0	0
Hughes	Calvin	59,590	51,500	56,255	68,879	89,685	139,655	98,542	98,132	251,854	324,182	133,239	124,683
Hughes	Dustin	0	0	0	0	0	0	0	0	0	0	0	0
Hughes	Graham-Dustin	0	0	0	0	0	0	0	0	0	197,804	102,095	27,264
Hughes	Holdenville	411,447	334,797	345,490	495,166	639,290	917,282	625,110	655,745	1,350,673	1,720,713	731,705	747,947
Hughes	Moss	96,582	83,802	95,286	123,466	165,728	246,609	168,369	166,101	357,458	435,348	194,012	193,887
Hughes	Stuart	100,834	81,758	92,757	125,699	155,785	238,326	159,517	165,698	307,590	371,783	150,817	177,324
Hughes	Wetumka	180,767	150,100	152,390	207,061	261,784	370,709	250,655	268,878	558,142	666,623	282,150	304,478
Jackson	Altus	94,148	81,518	47,582	25,741	32,221	26,019	18,624	5,561	13,701	23,587	15,973	34,970
Jackson	Blair	7,951	6,600	3,981	2,202	2,770	2,251	1,514	449	1,007	1,654	922	2,846
Jackson	Duke	5,090	4,193	2,655	1,376	1,717	1,368	885	295	791	1,043	715	1,830
Jackson	Eldorado	2,950	2,286	1,156	515	0	0	0	0	0	0	0	628
Jackson	Navajo	11,030	9,968	6,308	3,563	5,073	4,086	2,998	878	1,826	3,150	2,015	4,627
Jackson	Olustee	3,866	3,656	2,059	1,085	0	0	0	0	0	0	0	970
Jackson	Olustee-Eldorado	0	0	0	0	1,887	1,503	1,040	352	720	1,184	856	686
Jefferson	Ringling	99,723	49,315	8,532	13,272	15,826	19,583	19,533	18,369	22,653	26,086	18,017	28,264
Jefferson	Ryan	59,551	30,434	5,326	7,750	8,401	11,682	12,781	6,732	14,055	14,299	12,035	16,641
Jefferson	Terral	0	0	0	0	0	0	0	0	0	0	0	0
Jefferson	Waurika	97,156	44,609	8,162	12,609	14,927	20,789	22,844	12,124	27,084	29,310	20,965	28,234
Johnston	Coleman	33,126	38,893	35,986	26,328	27,414	32,699	47,525	24,075	55,528	76,679	54,470	41,157
Johnston	Milburn	31,318	40,572	32,960	29,984	32,179	40,901	59,635	28,688	70,084	89,716	54,169	46,382
Johnston	Mill Creek	22,376	30,113	28,557	24,456	28,148	31,857	48,714	24,054	55,228	82,589	53,161	39,023
Johnston	Tishomingo	153,210	196,523	173,114	138,244	154,309	174,769	261,663	131,288	284,563	365,925	232,070	205,971
Johnston	Wapanucka	38,355	48,739	44,426	36,788	42,568	49,186	75,031	36,010	78,424	96,106	57,528	54,833
Kay	Blackwell	162,131	182,009	140,975	83,808	75,062	70,089	42,160	20,574	47,435	60,149	36,315	83,701
Kay	Braman	0	0	0	0	0	0	0	0	0	0	0	0
Kay	Braman (Consolidated)	0	0	0	0	0	0	0	0	0	0	0	0
Kay	Newkirk	95,781	110,189	88,014	52,428	48,503	45,765	27,587	13,673	31,738	37,974	24,410	52,369
Kay	Ponca City	584,005	663,490	522,852	313,621	283,596	264,082	165,383	85,993	188,646	236,048	144,034	313,795
Kay	Tonkawa	81,882	91,477	73,602	44,633	43,591	42,135	27,118	14,589	33,599	42,707	26,922	47,478
Kingfisher	Cashion	166,555	268,318	261,753	595,211	1,346,823	1,993,197	2,061,411	1,248,454	2,586,283	4,071,529	2,334,033	1,539,415
Kingfisher	Dover	66,091	100,722	92,382	197,970	401,227	573,785	553,458	296,680	655,674	934,989	547,449	401,857
Kingfisher	Hennessey	289,496	467,583	471,463	1,059,249	2,344,552	3,256,804	3,029,089	1,740,439	3,442,464	4,845,578	2,662,842	2,146,324
Kingfisher	Kingfisher	492,967	748,585	746,100	1,692,524	3,842,242	5,515,262	5,247,993	2,999,748	5,671,451	7,720,906	4,212,604	3,535,489
Kingfisher	Lomega	76,647	124,977	124,927	303,429	644,730	874,902	803,596	447,283	886,008	1,287,337	695,149	569,908
Kingfisher	Okarche	98,952	164,225	174,532	407,946	965,935	1,358,477	1,351,250	777,992	1,591,220	2,255,036	1,365,629	955,563
Kiowa	Hobart	16,665	12,770	10,259	9,696	14,118	9,500	5,095	4,706	13,600	9,578	5,266	10,114
Kiowa	Lone Wolf	1,678	1,462	1,025	1,462	2,143	1,299	606	677	2,171	1,655	769	1,359
Kiowa	Mountain View-Gotebo	5,340	3,917	3,069	2,987	4,247	2,811	1,597	1,547	4,618	3,586	1,945	3,242
Kiowa	Snyder	10,086	6,795	5,306	5,324	7,707	5,467	3,125	3,164	9,096	6,245	3,345	5,969
Latimer	Buffalo Valley	89,152	36,236	27,253	43,365	53,150	32,179	24,533	35,287	84,135	97,283	57,134	52,701
Latimer	Panola	105,506	40,727	27,785	46,504	52,074	24,354	17,590	0	0	0	0	28,595
Latimer	Panola Elementary	0	0	0	0	0	0	0	0	0	0	0	0
Latimer	Red Oak	121,386	50,751	47,582	88,504	110,179	65,652	52,987	85,240	224,033	177,735	78,810	100,260
Latimer	Wilburton	457,291	184,100	161,015	274,187	304,412	187,616	137,130	225,277	553,439	462,427	218,685	287,780
Le Flore	Arkoma	11,082	6,831	3,379	7,391	8,320	6,435	3,400	5,263	11,778	10,704	4,932	7,229
Le Flore	Bokoshe	5,972	3,438	1,740	4,054	4,309	3,244	1,575	2,221	4,910	4,615	1,995	3,461

Figure 39. (Cont.) Gross Production Tax Distributions by County/School District

County	School District	FY2014	FY2015	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	FY2023	FY2024	10-Yr Avg
Le Flore	Cameron	8,646	5,347	2,300	5,062	6,059	4,486	2,501	3,777	7,685	7,908	4,094	5,260
Le Flore	Heavener	30,230	18,918	8,738	19,783	20,896	15,970	7,949	12,290	25,924	24,452	11,546	17,881
Le Flore	Howe	13,945	8,949	4,642	11,088	11,907	9,912	5,471	8,728	19,580	18,578	8,844	11,058
Le Flore	Le Flore	6,303	3,816	1,737	4,283	4,501	3,686	2,116	3,563	7,334	6,910	3,160	4,310
Le Flore	Panama	19,280	12,690	6,034	13,940	14,580	11,733	6,185	10,054	21,144	20,753	9,542	13,267
Le Flore	Pocola	22,695	14,416	6,677	15,644	17,252	13,917	6,848	10,429	21,979	20,902	9,636	14,581
Le Flore	Poteau	64,765	40,440	19,009	44,028	46,543	37,210	19,390	30,321	65,402	62,127	28,031	41,570
Le Flore	Spiro	33,171	19,833	9,078	20,684	21,800	17,056	8,971	14,099	31,254	29,171	13,319	19,858
Le Flore	Talihina	17,636	10,882	4,973	11,338	11,801	9,181	4,560	7,433	15,503	15,184	6,688	10,471
Le Flore	Whitesboro	5,460	3,577	1,691	3,768	4,396	3,730	1,831	2,682	6,138	6,411	2,742	3,857
Le Flore	Wister	15,696	10,213	4,812	10,339	10,937	7,893	4,023	6,524	14,026	14,161	6,448	9,552
Lincoln	Agra	65,977	40,937	37,648	38,360	46,860	43,361	22,092	14,482	33,325	42,368	21,365	36,979
Lincoln	Carney	34,082	20,223	20,310	27,103	36,131	32,854	17,469	11,619	23,351	28,967	14,806	24,265
Lincoln	Chandler	163,567	106,649	109,632	137,646	165,026	157,696	81,897	57,372	115,082	146,895	74,353	119,619
Lincoln	Davenport	51,718	35,511	34,878	43,975	52,554	50,849	28,545	20,475	37,688	49,206	25,299	39,154
Lincoln	Meeker	128,646	79,228	77,910	97,345	120,846	113,767	56,081	37,584	69,453	89,475	47,473	83,437
Lincoln	Prague	150,845	95,360	97,067	117,277	147,636	137,464	74,025	50,809	97,576	132,613	71,575	106,568
Lincoln	Stroud	123,814	76,792	74,634	93,978	109,829	105,292	55,680	39,130	83,033	110,846	58,773	84,709
Lincoln	Wellston	97,427	62,799	59,093	73,794	85,257	77,951	39,945	27,745	53,054	67,863	34,050	61,725
Lincoln	White Rock	0	0	0	0	0	0	0	0	0	0	0	0
Logan	Coyle	59,266	119,696	95,034	51,456	86,484	83,812	61,526	32,405	61,353	80,000	47,270	70,755
Logan	Crescent	114,783	273,145	205,781	100,785	155,483	138,761	105,747	57,831	126,758	151,697	82,899	137,606
Logan	Guthrie	614,402	1,435,606	1,092,243	556,215	870,018	820,419	632,553	359,018	652,332	838,400	480,178	759,217
Logan	Mulhall-Orlando	46,408	99,894	75,863	39,804	66,234	57,350	44,204	23,890	48,098	58,411	33,215	53,943
Love	Marietta	394,549	281,646	220,844	517,902	675,088	661,090	561,455	316,472	741,547	1,350,854	1,178,992	627,313
Love	Thackerville	111,673	81,298	67,638	167,833	208,471	187,077	139,217	76,936	188,188	348,205	289,266	169,618
Love	Turner	125,368	88,055	68,909	155,209	192,614	190,921	161,739	84,708	203,784	361,229	311,847	176,762
Major	Aline-Cleo	134,128	120,492	70,402	64,972	97,265	160,115	127,387	92,256	143,751	194,584	115,833	120,108
Major	Cimarron	266,260	222,166	121,740	108,944	157,386	294,220	249,846	181,693	251,109	264,065	189,837	209,752
Major	Fairview	658,658	573,755	334,344	298,354	483,074	887,226	757,049	560,492	934,987	1,172,611	788,526	677,189
Major	Ringwood	367,432	324,741	187,268	169,741	265,214	434,390	365,710	265,912	467,958	572,838	390,491	346,518
Marshall	Kingston	273,594	317,545	218,028	160,901	200,622	248,639	118,928	120,296	312,015	375,335	153,223	227,193
Marshall	Madill	416,535	473,288	314,341	233,530	291,867	355,479	168,494	169,922	484,049	560,248	215,076	334,803
Mayes	Adair	332	225	117	827	780	794	587	216	536	626	216	478
Mayes	Chouteau-Mazie	272	188	98	689	640	634	477	165	415	471	167	383
Mayes	Locust Grove	489	311	156	1,129	1,021	1,029	752	268	698	736	251	622
Mayes	Pryor	849	554	292	2,110	1,912	1,985	1,499	546	1,387	1,547	574	1,205
Mayes	Salina	268	173	90	670	623	596	434	159	404	431	160	364
McClain	Blanchard	271,705	210,786	145,282	134,101	263,518	423,520	601,353	413,504	929,350	1,205,725	836,772	494,147
McClain	Dibble	104,431	78,215	50,616	44,461	83,597	139,573	203,011	141,214	315,265	404,231	273,603	167,110
McClain	Newcastle	272,906	216,787	150,447	144,360	284,772	454,634	656,084	474,756	1,102,890	1,426,904	975,652	560,017
McClain	Purcell	217,756	163,654	107,054	98,476	187,592	291,964	411,472	286,972	656,275	804,192	551,126	343,321
McClain	Washington	144,336	111,270	75,517	70,146	136,400	222,307	313,300	212,440	495,603	667,525	452,779	263,784
McClain	Wayne	76,030	60,577	40,886	36,597	69,157	111,194	142,813	96,431	210,728	263,920	171,662	116,363
McCurtain	Battiest	0	0	0	0	0	0	0	0	0	0	0	0
McCurtain	Broken Bow	0	0	0	0	0	0	0	0	0	0	0	0
McCurtain	Eagletown	0	0	0	0	0	0	0	0	0	0	0	0
McCurtain	Haworth	0	0	0	0	0	0	0	0	0	0	0	0
McCurtain	Idabel	0	0	0	0	0	0	0	0	0	0	0	0
McCurtain	Smithville	0	0	0	0	0	0	0	0	0	0	0	0

Figure 39. (Cont.) Gross Production Tax Distributions by County/School District

County	School District	FY2014	FY2015	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	FY2023	FY2024	10-Yr Avg
McCurtain	Valliant	0	0	0	0	0	0	0	0	0	0	0	0
McCurtain	Wright City	0	0	0	0	0	0	0	0	0	0	0	0
McIntosh	Checotah	17,879	13,587	7,673	13,184	11,511	10,668	8,140	80,666	150,674	136,048	51,149	45,562
McIntosh	Eufaula	13,885	10,526	5,940	10,036	9,049	8,501	6,628	67,323	126,110	108,759	42,613	37,215
McIntosh	Hanna	3,203	2,025	521	899	703	672	472	4,086	8,385	6,487	2,158	2,692
McIntosh	Midway	2,693	2,247	1,084	2,064	1,822	1,703	1,265	13,030	26,242	17,937	7,859	7,086
Murray	Davis	59,522	40,823	17,337	20,461	26,217	31,362	19,022	10,036	17,565	27,539	37,826	27,974
Murray	Sulphur	82,747	57,555	25,293	29,859	34,670	46,615	29,578	16,587	29,179	45,227	65,317	42,057
Muskogee	Boynton-Moton	0	0	0	0	0	0	0	0	0	0	0	0
Muskogee	Braggs	457	359	137	206	293	186	134	70	115	166	108	203
Muskogee	Fort Gibson	4,559	3,786	1,411	2,079	2,993	2,231	1,593	783	1,704	2,267	1,589	2,272
Muskogee	Haskell	2,121	1,694	609	928	1,381	999	674	321	673	860	627	990
Muskogee	Hilldale	4,457	3,729	1,409	2,107	3,031	2,224	1,626	862	1,868	2,544	1,885	2,340
Muskogee	Muskogee	15,130	11,665	4,526	7,438	9,129	7,463	3,945	2,409	4,889	5,538	4,256	6,944
Muskogee	Oktaha	1,916	1,543	570	821	1,227	919	637	299	647	909	636	920
Muskogee	Porum	1,185	984	376	567	805	602	416	193	435	580	383	593
Muskogee	Warner	1,768	1,483	574	890	1,321	1,005	742	355	778	1,063	743	975
Muskogee	Webbers Falls	694	536	199	321	441	354	254	131	273	390	273	351
Noble	Billings	33,490	35,229	26,629	13,633	16,429	12,951	10,569	5,714	13,354	15,427	12,238	17,788
Noble	Frontier	167,782	200,069	154,068	68,493	82,362	69,739	56,651	29,430	63,306	87,293	57,780	94,270
Noble	Morrison	262,735	304,506	219,029	102,978	133,738	119,037	93,065	47,834	108,217	151,287	105,471	149,809
Noble	Perry	546,952	642,166	478,528	206,063	251,229	212,157	171,563	85,733	178,249	247,745	171,678	290,188
Nowata	Nowata	76,943	30,518	25,273	32,490	25,943	23,620	15,190	9,604	13,803	15,678	11,063	25,466
Nowata	Oklahoma Union	53,583	20,961	18,237	23,399	19,592	18,701	12,905	7,651	11,840	14,286	9,265	19,129
Nowata	South Coffeyville	20,930	8,899	7,119	9,434	7,570	6,667	4,513	2,849	4,349	5,922	4,019	7,479
Okfuskee	Boley	0	0	0	0	0	0	0	0	0	0	0	0
Okfuskee	Graham	0	0	0	0	0	0	0	0	0	0	0	0
Okfuskee	Graham-Dustin	160,465	173,153	23,241	16,410	17,096	16,686	11,839	11,694	23,784	0	0	41,306
Okfuskee	Mason	20,653	17,645	23,854	24,321	25,252	24,603	18,022	17,711	33,886	44,506	22,302	24,796
Okfuskee	Okemah	63,900	54,592	76,810	73,956	76,148	73,911	54,088	53,426	97,097	120,394	63,068	73,399
Okfuskee	Paden	18,931	16,780	21,521	22,660	24,015	22,768	16,732	15,908	32,559	37,449	18,649	22,543
Okfuskee	Weleetka	29,514	26,090	36,488	36,795	38,819	37,805	29,394	29,551	56,343	67,990	33,104	38,354
Oklahoma	Bethany	17,686	16,876	9,776	10,434	11,852	11,394	8,329	7,184	21,387	27,929	17,039	14,535
Oklahoma	Choctaw-Nicoma Park	78,471	76,110	32,888	33,552	38,722	37,186	26,920	23,355	65,659	88,413	54,090	50,488
Oklahoma	Crooked Oak	11,882	11,013	6,511	7,413	8,084	7,565	5,497	4,880	13,359	18,495	10,934	9,603
Oklahoma	Deer Creek	48,302	50,075	30,776	34,440	40,721	40,987	31,998	28,866	86,456	117,578	73,533	53,066
Oklahoma	Edmond	236,422	226,758	133,152	144,365	166,821	162,513	120,868	106,506	297,001	412,991	250,552	205,268
Oklahoma	Harrah	22,504	20,712	11,815	12,773	14,976	14,811	10,785	9,355	24,035	33,047	20,564	17,762
Oklahoma	Jones	12,025	11,218	6,285	6,789	7,773	7,280	5,275	4,648	12,841	17,542	10,783	9,314
Oklahoma	Luther	9,228	9,179	5,267	5,241	5,378	5,307	3,822	3,260	9,293	12,995	7,862	6,985
Oklahoma	Midwest City-Del City	152,195	141,847	82,279	86,264	96,208	91,342	65,914	57,307	134,175	187,287	114,917	109,976
Oklahoma	Millwood	9,447	10,032	5,577	5,401	5,866	5,504	4,474	3,938	10,831	15,990	10,334	7,945
Oklahoma	Oklahoma City	461,756	444,176	260,004	278,520	314,769	325,529	250,419	223,803	349,159	478,018	296,516	334,788
Oklahoma	Putnam City	200,119	189,167	108,953	115,377	131,286	125,261	90,827	79,711	214,725	226,227	170,867	150,229
Oklahoma	Western Heights	38,222	36,154	21,041	21,835	23,397	21,404	15,214	13,201	27,317	38,964	24,876	25,602
Okmulgee	Beggs	31,682	29,962	14,655	15,049	18,932	20,880	14,512	6,749	13,016	31,795	14,265	19,227
Okmulgee	Dewar	11,445	10,026	5,065	5,448	7,136	7,923	5,996	2,997	5,646	8,831	6,710	7,020
Okmulgee	Henryetta	32,986	32,183	15,455	16,337	20,859	23,099	16,258	7,880	13,953	21,113	14,594	19,520
Okmulgee	Morris	27,266	27,237	13,273	14,063	18,270	20,727	13,749	6,630	12,733	18,784	13,119	16,895
Okmulgee	Okmulgee	40,350	38,795	18,937	19,754	24,568	25,737	17,289	8,054	14,892	21,920	15,555	22,350

Figure 39. (Cont.) Gross Production Tax Distributions by County/School District

County	School District	FY2014	FY2015	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	FY2023	FY2024	10-Yr Avg
Okmulgee	Preston	14,237	13,335	7,184	7,914	9,545	10,827	7,683	3,923	8,237	12,883	8,883	9,514
Okmulgee	Schulter	4,507	3,669	1,768	1,880	2,283	2,839	2,008	884	1,819	3,746	3,330	2,612
Okmulgee	Wilson	7,045	5,931	2,854	3,041	4,201	4,523	3,193	1,690	3,420	5,980	3,779	4,151
Osage	Barnsdall	217,162	114,767	62,908	106,329	106,448	144,329	94,865	52,956	115,450	196,957	146,327	123,500
Osage	Hominy	297,738	148,645	84,802	145,934	151,644	208,081	130,551	79,122	176,538	266,265	178,363	169,789
Osage	Pawhuska	560,251	343,685	196,425	231,061	235,096	292,334	188,770	119,578	264,301	393,988	271,170	281,515
Osage	Prue	189,180	127,423	75,444	90,597	98,140	129,435	78,363	47,874	114,574	161,936	117,651	111,874
Osage	Shidler	126,522	59,375	36,181	58,733	62,892	87,293	51,365	31,313	60,744	102,869	71,795	68,098
Osage	Woodland	217,252	104,489	63,576	109,423	111,215	145,568	103,444	54,876	123,513	184,867	129,838	122,551
Osage	Wynona	66,810	28,858	17,069	28,917	31,243	39,398	23,497	12,472	30,376	49,787	48,214	34,240
Pawnee	Cleveland	302,307	247,373	113,796	120,355	114,047	165,081	106,613	52,737	117,981	152,064	100,770	144,830
Pawnee	Pawnee	133,516	118,382	52,922	52,744	48,583	68,703	44,354	21,615	45,037	61,658	40,888	62,582
Payne	Cushing	128,886	266,698	203,117	129,247	170,887	130,397	85,891	35,286	59,465	89,743	58,545	123,469
Payne	Glencoe	24,298	50,519	38,892	25,531	31,131	24,307	17,293	6,881	12,955	18,669	12,041	23,865
Payne	Perkins-Tryon	104,856	215,874	168,895	108,477	141,793	109,137	72,813	30,919	61,955	86,179	54,665	105,051
Payne	Ripley	33,866	68,406	51,942	33,622	43,850	33,950	22,167	8,986	16,659	24,292	15,719	32,133
Payne	Stillwater	424,725	888,725	691,259	443,097	580,933	449,021	296,965	124,901	219,525	326,859	209,354	423,215
Payne	Yale	33,317	68,918	49,735	30,521	39,591	29,464	19,739	8,271	14,138	19,919	12,290	29,627
Pittsburg	Canadian	140,335	116,058	73,653	100,101	126,906	109,050	67,517	84,858	140,919	174,863	120,136	114,036
Pittsburg	Crowder	149,626	116,098	75,741	102,740	105,633	85,885	54,845	57,552	100,936	129,351	92,519	97,357
Pittsburg	Haileyville	115,149	88,315	58,423	76,628	75,928	61,787	44,331	54,838	99,023	116,582	80,673	79,243
Pittsburg	Hartshorne	231,041	183,839	127,482	168,769	191,361	159,050	108,722	133,410	236,617	270,686	194,724	182,337
Pittsburg	Indianola	70,925	56,948	35,689	48,196	55,983	49,622	38,109	47,253	82,888	111,479	80,095	61,562
Pittsburg	Kiowa	98,078	76,307	50,106	68,195	76,899	61,235	43,174	51,445	92,615	112,283	79,483	73,620
Pittsburg	Krebs	0	0	0	0	0	0	0	0	0	0	0	0
Pittsburg	Mcalester	919,802	720,558	490,927	653,650	719,190	609,607	423,476	537,557	946,758	1,178,441	807,969	727,994
Pittsburg	Pittsburg	43,704	34,753	22,856	34,208	35,370	29,849	20,436	26,395	66,924	64,823	45,058	38,580
Pittsburg	Quinton	170,794	122,494	77,463	103,202	115,508	89,002	60,180	73,355	132,242	164,251	109,536	110,730
Pittsburg	Savanna	109,411	95,572	61,437	80,068	93,304	81,526	56,827	66,543	123,383	154,472	97,692	92,748
Pontotoc	Ada	491,473	516,053	263,491	187,949	242,690	261,697	213,457	96,676	227,292	318,645	233,357	277,526
Pontotoc	Allen	83,911	89,809	47,197	35,514	47,623	51,338	43,657	18,660	43,929	59,444	39,927	51,001
Pontotoc	Byng	334,591	343,957	173,070	127,207	165,924	184,169	152,751	67,136	159,961	222,030	157,562	189,851
Pontotoc	Latta	159,167	172,171	83,956	62,227	79,614	91,013	77,111	38,350	83,432	116,928	81,284	95,023
Pontotoc	Roff	63,844	69,445	33,685	23,129	30,078	32,368	27,336	12,096	26,227	37,308	25,504	34,638
Pontotoc	Stonewall	81,360	85,796	44,902	34,312	43,216	45,312	37,404	17,104	40,269	57,204	40,812	47,972
Pontotoc	Vanoss	99,522	101,627	52,172	39,598	51,779	57,888	48,375	20,663	47,384	70,377	52,608	58,363
Pottawatomie	Asher	16,629	17,699	9,399	6,472	9,253	9,762	8,207	4,112	8,285	10,748	7,492	9,824
Pottawatomie	Bethel	90,423	87,672	47,316	34,342	44,562	42,275	34,950	17,686	36,515	50,128	34,477	47,304
Pottawatomie	Dale	46,668	47,630	26,666	19,640	26,397	27,480	22,881	11,704	24,625	33,220	22,674	28,144
Pottawatomie	Earlsboro	15,036	15,033	8,516	6,399	8,948	9,204	7,633	4,054	8,224	11,114	7,774	9,267
Pottawatomie	Macomb	21,598	21,109	10,235	7,309	9,001	9,047	7,834	3,870	7,707	10,340	6,951	10,455
Pottawatomie	Maud	21,131	21,661	11,700	8,092	10,098	10,526	7,918	3,779	8,051	11,068	7,808	11,076
Pottawatomie	Mcloud	117,946	120,106	64,963	46,597	59,310	57,709	48,594	24,545	48,295	65,745	46,666	63,680
Pottawatomie	North Rock Creek	0	0	0	0	0	0	0	0	34,143	50,295	34,358	10,800
Pottawatomie	Shawnee	262,922	264,274	138,925	96,401	127,342	128,344	105,581	52,389	106,786	135,758	92,017	137,340
Pottawatomie	Tecumseh	143,326	148,736	79,734	55,949	71,728	70,959	59,296	30,825	61,060	79,673	55,697	77,908
Pottawatomie	Wanette	13,719	13,566	6,638	4,468	5,115	4,981	4,224	1,997	3,959	5,320	3,787	6,161
Pushmataha	Antlers	20,366	21,851	9,948	12,923	19,573	19,444	8,969	6,934	24,722	29,013	13,089	16,985
Pushmataha	Clayton	6,237	6,580	2,848	3,858	6,016	6,079	2,794	2,106	6,682	6,437	2,907	4,777
Pushmataha	Moyers	3,859	4,545	2,069	2,728	3,619	3,553	1,553	1,221	4,250	5,556	2,505	3,223

Figure 39. (Cont.) Gross Production Tax Distributions by County/School District

County	School District	FY2014	FY2015	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	FY2023	FY2024	10-Yr Avg
Pushmataha	Rattan	10,296	10,717	4,818	6,545	9,956	9,946	4,550	3,384	12,002	14,073	6,298	8,417
Roger Mills	Cheyenne	1,280,806	1,539,143	918,218	749,671	800,589	811,244	433,510	290,514	586,506	669,296	346,859	766,032
Roger Mills	Hammon	1,005,491	1,129,816	658,432	515,712	545,010	545,848	293,238	209,400	426,598	514,443	291,888	557,807
Roger Mills	Leedey	835,085	891,961	555,625	483,859	481,175	529,353	288,663	175,916	377,318	437,755	237,617	481,302
Roger Mills	Reydon	511,374	540,407	352,443	258,787	255,047	295,217	145,612	96,708	216,857	260,041	138,109	279,145
Roger Mills	Sweetwater	404,559	549,469	323,729	287,062	301,492	291,312	147,925	105,334	229,747	259,960	129,280	275,442
Rogers	Catoosa	4,876	2,233	1,455	1,770	1,719	1,660	828	567	923	1,054	515	1,600
Rogers	Chelsea	2,155	989	629	785	721	688	346	235	391	442	219	691
Rogers	Claremore	9,245	4,265	2,806	3,410	3,267	3,167	1,615	1,128	1,950	2,244	1,110	3,110
Rogers	Foyil	1,402	607	384	447	435	420	203	139	233	254	119	422
Rogers	Inola	3,021	1,480	968	1,172	1,149	1,105	548	384	627	767	384	1,055
Rogers	Justus-Tiawah	0	0	0	0	0	0	0	0	0	0	0	0
Rogers	Oologah-Talala	4,138	1,932	1,256	1,538	1,483	1,460	759	535	858	1,008	495	1,406
Rogers	Sequoyah	3,008	1,451	950	1,164	1,143	1,114	560	390	643	759	369	1,050
Rogers	Verdigris	2,787	1,306	870	1,085	1,087	1,111	606	419	694	830	401	1,018
Seminole	Bowlegs	81,714	65,549	44,580	39,623	44,697	45,395	33,089	17,431	40,828	52,143	31,625	45,152
Seminole	Butner	64,189	56,312	37,109	34,860	42,299	38,177	30,967	18,584	31,522	41,522	27,396	38,449
Seminole	Konawa	207,594	167,500	110,562	102,335	113,770	111,236	84,895	47,184	94,051	117,155	71,887	111,652
Seminole	New Lima	78,741	66,542	45,126	43,308	50,527	50,734	40,382	20,863	40,272	53,634	35,039	47,743
Seminole	Sasakwa	62,123	47,880	34,061	30,998	32,172	31,203	26,185	17,401	34,373	45,179	28,955	35,503
Seminole	Seminole	530,700	414,347	275,209	251,197	277,682	274,135	216,349	121,216	231,782	300,281	187,081	279,998
Seminole	Strother	117,297	104,202	66,069	61,659	72,411	72,121	58,115	32,688	66,896	89,700	52,694	72,168
Seminole	Varnum	85,655	68,403	46,075	41,683	49,335	52,605	42,043	23,540	59,713	72,923	43,880	53,260
Seminole	Wewoka	225,701	180,517	120,583	99,678	115,025	113,107	85,462	52,165	109,705	145,675	87,988	121,419
Sequoyah	Central	1,240	904	797	1,196	985	915	411	628	1,621	1,470	569	976
Sequoyah	Gans	909	658	638	1,023	854	781	346	510	1,332	1,075	410	776
Sequoyah	Gore	1,236	857	718	1,063	958	972	419	652	1,801	1,647	618	995
Sequoyah	Muldrow	3,795	2,681	2,323	3,584	2,854	2,716	1,177	1,704	4,432	4,074	1,601	2,813
Sequoyah	Roland	2,666	1,852	1,617	2,425	1,901	1,752	767	1,155	2,883	2,676	1,109	1,891
Sequoyah	Sallisaw	4,750	3,386	2,956	4,644	3,783	3,648	1,593	2,365	6,319	5,725	2,170	3,758
Sequoyah	Vian	2,403	1,658	1,542	2,265	1,795	1,765	750	1,099	2,861	2,583	993	1,792
Stephens	Bray-Doyle	156,110	213,250	176,828	173,738	216,322	240,612	131,173	101,169	245,547	302,783	156,536	192,188
Stephens	Central High	189,461	234,842	208,931	195,648	246,245	298,627	181,139	135,906	362,410	451,834	248,008	250,277
Stephens	Comanche	485,139	564,310	507,713	490,283	638,833	719,057	407,709	304,075	818,948	1,046,534	474,798	587,036
Stephens	Duncan	1,668,919	1,985,018	1,765,284	1,715,726	2,158,124	2,544,483	1,468,484	1,141,806	2,916,820	3,734,286	1,970,478	2,097,221
Stephens	Empire	213,696	262,358	229,150	238,955	331,899	404,994	227,521	175,361	477,725	588,427	301,967	313,823
Stephens	Marlow	603,179	732,763	689,413	676,076	874,547	1,076,076	621,699	449,567	1,177,816	1,576,836	832,577	846,414
Stephens	Velma-Alma	191,885	240,122	228,840	227,284	283,750	330,615	199,128	151,827	395,068	484,925	265,901	272,668
Texas	Goodwell	77,766	52,241	36,357	60,290	59,052	66,058	35,324	22,295	50,630	68,032	34,733	51,162
Texas	Guymon	1,021,596	682,685	425,328	750,968	749,849	809,912	444,657	289,560	678,515	893,290	476,239	656,600
Texas	Hardesty	29,288	22,109	14,184	22,685	23,690	25,512	11,478	7,331	18,400	21,286	9,376	18,667
Texas	Hooker	225,939	152,514	96,259	172,801	167,143	177,555	94,766	60,198	143,713	184,122	99,031	143,095
Texas	Texhoma	103,708	66,990	41,918	64,656	63,623	66,129	35,846	23,558	55,597	72,987	38,034	57,549
Texas	Tyrone	94,889	61,269	36,554	60,601	58,170	58,649	31,327	20,825	49,922	69,404	37,169	52,616
Texas	Yarbrough	46,716	31,833	18,820	30,718	31,991	28,024	14,857	7,744	21,919	32,608	18,914	25,831
Tillman	Davidson	12,774	9,344	2,797	1,676	0	0	0	0	0	0	0	2,417
Tillman	Frederick	126,536	102,917	34,061	22,790	27,133	41,258	25,362	10,736	27,304	31,694	23,420	43,019
Tillman	Grandfield	37,503	30,566	9,755	6,413	7,293	9,409	6,264	2,673	6,953	7,987	6,712	11,957
Tillman	Tipton	51,197	39,614	12,822	7,416	8,859	13,727	8,337	3,333	7,992	8,723	6,728	15,341
Tulsa	Berryhill	1,583	1,333	722	711	763	924	672	339	815	1,040	757	878

Figure 39. (Cont.) Gross Production Tax Distributions by County/School District

County	School District	FY2014	FY2015	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	FY2023	FY2024	10-Yr Avg
Tulsa	Bixby	6,776	5,867	3,304	3,413	3,824	4,778	3,689	1,923	4,711	6,634	5,127	4,550
Tulsa	Broken Arrow	21,250	18,512	10,295	10,423	11,556	14,004	10,487	5,559	13,265	17,551	12,931	13,258
Tulsa	Collinsville	3,310	2,727	1,518	1,518	1,723	2,085	1,569	827	2,071	2,764	2,093	2,019
Tulsa	Glenpool	2,996	2,602	1,464	1,514	1,670	2,047	1,539	806	1,893	2,505	1,834	1,897
Tulsa	Jenks	13,534	11,451	6,391	6,500	7,345	9,158	6,900	3,597	8,674	11,527	8,340	8,493
Tulsa	Liberty	725	589	317	308	340	401	291	146	341	430	317	382
Tulsa	Owasso	11,745	9,682	5,454	5,444	6,045	7,311	5,387	2,825	6,619	8,790	6,424	6,884
Tulsa	Sand Springs	6,530	5,442	2,948	2,900	3,153	3,798	2,796	1,437	3,505	4,642	3,456	3,691
Tulsa	Skiatook	3,165	2,598	1,426	1,414	1,545	1,872	1,341	675	1,600	2,106	1,509	1,750
Tulsa	Sperry	803,536	289,633	175,826	293,727	301,007	400,984	240,361	139,926	319,278	526,344	359,201	349,984
Tulsa	Tulsa	50,539	42,071	22,990	22,747	24,866	29,485	21,672	11,005	20,495	27,236	20,119	26,657
Tulsa	Union	18,878	15,947	8,774	8,878	9,672	11,718	8,637	4,463	10,569	13,244	9,486	10,933
Wagoner	Coweta	15,311	16,978	9,086	6,944	6,506	6,848	3,476	1,201	1,545	1,863	1,994	6,523
Wagoner	Okay	1,953	2,057	1,121	852	842	770	381	132	165	191	212	789
Wagoner	Porter Consolidated	2,735	2,984	1,517	1,175	1,066	1,066	563	208	255	294	312	1,107
Wagoner	Wagoner	11,088	12,252	6,385	4,982	4,728	4,904	2,451	811	991	1,127	1,191	4,628
Washington	Bartlesville	125,391	47,435	36,354	58,837	55,614	66,828	39,702	22,249	43,005	56,674	39,773	53,806
Washington	Caney Valley	16,333	5,983	4,635	7,582	7,431	9,241	5,500	3,112	5,622	7,238	4,938	7,056
Washington	Copan	14,420	7,060	2,283	2,378	2,240	2,614	1,497	776	1,557	2,115	1,532	3,497
Washington	Dewey	26,953	9,931	7,532	12,102	11,303	13,988	8,272	4,629	8,695	11,396	8,000	11,164
Washita	Burns Flat-Dill City	836,684	758,414	385,820	299,451	303,554	255,284	139,234	155,892	276,365	324,615	138,793	352,191
Washita	Canute	541,036	502,299	256,061	215,259	225,734	178,539	93,303	96,037	197,682	254,594	115,516	243,278
Washita	Cordell	923,997	875,767	427,991	360,969	367,808	289,458	163,117	181,538	343,655	408,671	168,483	410,132
Washita	Sentinel	428,398	390,703	196,625	168,497	166,286	134,170	77,760	83,918	166,995	200,441	86,036	190,894
Washita	Washita Heights	0	0	0	0	0	0	0	0	0	0	0	0
Woods	Alva	2,572,076	3,735,639	2,030,610	2,349,039	2,356,914	2,065,073	1,069,820	573,154	1,303,452	1,545,028	818,645	1,856,314
Woods	Freedom	201,513	326,085	174,265	187,275	169,465	150,268	67,919	26,200	55,224	64,511	28,181	131,900
Woods	Waynoka	686,945	1,058,644	584,018	627,672	568,568	465,073	239,258	123,808	262,968	338,794	187,740	467,590
Woodward	Fort Supply	14,843	14,925	10,145	9,797	14,756	21,130	13,976	7,281	11,296	22,358	9,692	13,654
Woodward	Mooreland	62,738	66,729	38,971	36,585	58,238	88,075	57,972	30,022	50,928	88,832	40,755	56,349
Woodward	Sharon-Mutual	37,872	37,847	22,544	20,810	31,754	43,953	28,895	12,374	16,800	29,083	14,373	26,937
Woodward	Woodward	344,573	372,161	226,150	197,570	307,725	455,950	290,992	141,753	222,960	369,758	172,630	282,020
All Counties	All Districts	$79,735,839	$83,877,100	$56,880,656	$60,535,813	$81,606,568	$103,601,375	$77,662,782	$57,603,655	$116,191,816	$152,366,139	$90,581,406	$87,331,195

Source: Oklahoma State Department of Education – Oklahoma Cost Accounting System (OCAS)

Total Business Tax Burden

In addition to large severance tax payments, the state's oil and gas cluster is well known for paying significant amounts of state and local taxes across all major tax streams. This section of the report examines the Bureau of Economic Analysis (BEA) dataset[21]on state-level tax payments by industry to evaluate the total tax contribution of firms operating within Oklahoma's oil and gas cluster.

BEA Database on Business Taxes

The BEA data collection program for state Gross Domestic Product (GDP) provides the most widely used comparative measure of federal, state, and local business taxes paid by industry sector within each state.[22] The dataset provides a comprehensive and consistent tabulation of business taxes paid on goods and services produced or imported by firms in 81 NAICS industry sectors at the state level. While data is not available at highly disaggregated industry levels, the dataset captures the tax payments of the major components of the state's oil and gas cluster – primarily the mining, pipeline, and refinery sectors.

The BEA dataset is especially useful for calculating the 'business' tax contribution of firms within an industry because it captures all federal, state, and local taxes paid by firms that are deductible for tax purposes. As a result, the dataset captures nearly all taxes paid except corporate income taxes and employer social security contributions.[23]

It is important to note that the BEA dataset excludes tax payments by households on the compensation of wage and salary workers. Taxes paid on self-employment or proprietors' earnings are likewise excluded.[24]

The dataset also subtracts tax subsidies from tax payments to provide an estimate of net tax payments by sector. Federal and state subsidies to most industries were quite large in the recent pandemic period.

Although not broken down into detail by individual type of tax, the dataset is unique in that it divides total statewide tax payments into the industry sectors making the payments. A comprehensive set of state and local taxes are tracked including sales and use taxes, motor fuel, property, severance, motor vehicle, state payroll, and others.[25] The data is of further value for assessing tax burden in this report because approximately 90% of the taxes are paid to state and local governments, with only about 10% going to federal government (primarily excise taxes and custom duties).

Payments by the Oil and Gas Cluster

BEA tax estimates for the mining sector are combined with the taxes paid by refineries and pipelines operating in the state to estimate payments made by the oil and gas cluster. This captures a high percentage of all business taxes paid by firms operating in the cluster.

Based on the BEA dataset, Oklahoma establishments in the oil and gas cluster paid a total of $2.97 billion in net business taxes in 2024 (*Figure 40a*). Again, state and local taxes comprise most of the payments with federal payments only a small share. The $2.97 billion paid in 2024 is up slightly from the $2.95 billion paid in 2023 but down substantially from the pandemic-driven $3.7 billion paid in 2022. Over the prior decade, firms in the state's oil and gas cluster has paid an average of $2.74 billion annually in federal, state, and local business taxes.

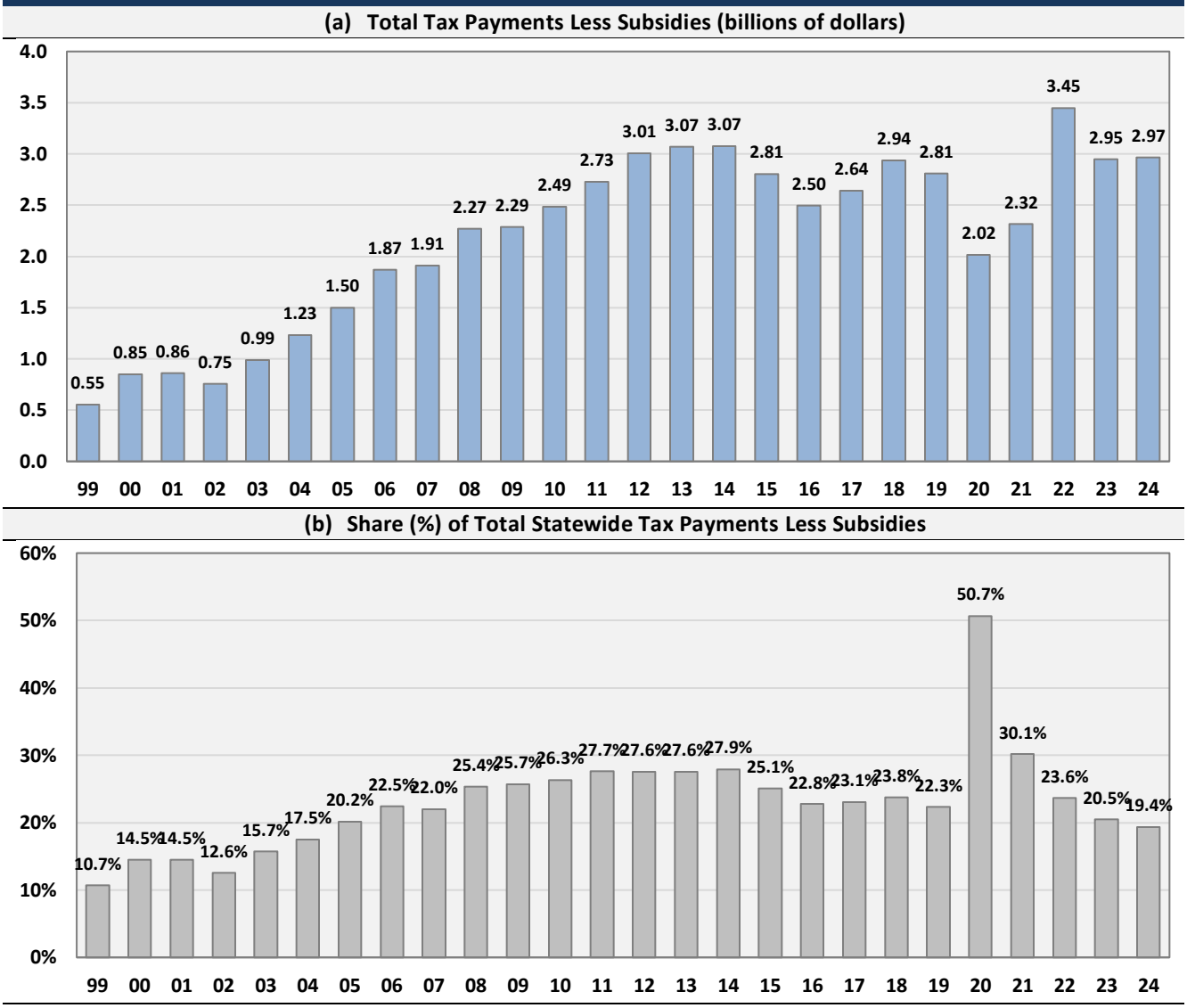
Oil and Gas Cluster Pays a High Share of Total Oklahoma Business Taxes

Firms in the state's oil and gas cluster account for a large share of total business taxes paid by all firms in the state (*Figure 40b*). BEA reports a total of $15.3 billion in total business taxes paid by firms across all industries in Oklahoma in 2024. This suggests that the $2.97 billion in tax payments by firms in the state's oil and gas cluster accounted for 19.4% of total business taxes paid statewide in 2024.

The share of total statewide taxes paid by the cluster surged to 51% during the pandemic year of 2020. Firms in most other sectors experienced far larger relative tax subsidies that greatly reduced their share of taxes paid. Total taxes paid statewide by all sectors fell by 68% from 2019 to 2020 during the pandemic but dropped by only 28% in the oil and gas cluster.

The 19.4% share of total state taxes paid by the oil and gas cluster in 2024 has returned closer to the average share over much of the past decade and is expected to stabilize in this range. Again, the cluster comprises only 2.8% of state business establishments and 4.2% of total state employment but accounts for almost 20% of total business taxes paid by Oklahoma firms.

Figure 40. Federal, State, & Local Tax Payments Less Subsidies – Oil and Gas Cluster



Notes: Tax payments include federal, state, and local tax payments on production and imports. Payments are in calendar years.
Source: Bureau of Economic Analysis and RegionTrack calculations

Oil and Gas Cluster vs. Other Major Industries in Oklahoma

The share of total state business taxes paid by firms in the oil and gas cluster is far higher than all other major industry sectors in the state. Figure 41 provides estimates of total business tax payments for most major industry sectors in Oklahoma in 2024 and each industry's share of total state taxes. The oil and gas drilling, production, and support sector accounted for 18.1% of total statewide taxes; the refinery sector accounted for 0.3%; and pipelines paid 1.0% of total statewide taxes in 2024. Combined, these three components of the state's oil and gas cluster accounted for 19.4% of all federal, state, and local taxes paid statewide. The drilling, production, and support sector alone accounted for 93% of total cluster tax payments, with pipelines and refineries paying a combined 7% of total cluster taxes. Gross production taxes (primarily severance taxes) comprise most of the total tax payments derived from the state's oil and gas cluster.

The oil and gas cluster continues to pay roughly the same share of total taxes as the state's two key sales tax conduit sectors, Wholesale Trade (19.7%) and Retail Trade (17.0%), both of which collect and forward significant taxes but produce relatively little GDP (their combined GDP is less than the mining sector).

The share of total statewide business taxes paid is far lower in the state's other key high-tax-share sectors including Accommodations and Food Service ($1.0 billion, 6.6% share), Finance and Insurance ($765 million, 5.0% share), Utilities ($591 million, 3.9% share), Transportation and Warehousing ($479 million, 3.1% share),and Arts, Entertainment, and Recreation ($316 million, 2.1% share). Combined, these five high-tax industries paid $3.16 billion in total taxes in 2024, or 20.7% of total statewide business taxes paid, only slightly more than the 19.4% share of total state taxes paid by firms in the oil and gas cluster. The real estate rental and leasing sector is the only other significant contributor to total business taxes but paid only $1.52 billion in 2024, or 9.9% of total taxes paid statewide across all industries.

Relatively small contributions were produced by the manufacturing ($523 million), construction ($119 million), and health care ($441 million) sectors in 2024. Net subsidies through business taxes totaling $150 million were provided to the agricultural sector in 2024.

Figure 41. Federal, State, & Local Tax Payments Less Subsidies by Major Sector – Oklahoma (2024)

Industry Sector	($millions) Total Taxes Less Subsidies	Share of Total Taxes Less Subsidies
Private Industries:	*$15,592.2*	*101.0%*
Agriculture, forestry, fishing and hunting	-149.6	-1.0%
Mining, quarrying, and oil and gas extraction	2,811.5	18.4%
Oil and gas drilling, production, and support	**2,764.9**	**18.1%**
Utilities	590.6	3.9%
Construction	119.3	0.8%
Manufacturing	522.7	3.4%
Durable goods manufacturing	216.2	1.4%
Nondurable goods manufacturing	306.5	2.0%
Petroleum and coal products manufacturing	**51.7**	**0.3%**
Wholesale trade	3,015.6	19.7%
Retail trade	2,597.6	17.0%
Transportation and warehousing	478.8	3.1%
Pipeline transportation	**149.8**	**1.0%**
Information	318.0	2.1%
Finance and insurance	764.6	5.0%
Real estate and rental and leasing	1,515.0	9.9%
Professional, scientific, and technical services	407.5	2.7%
Management of companies and enterprises	210.7	1.4%
Administrative and support and waste management	307.4	2.0%
Educational services	59.4	0.4%
Health care and social assistance	440.8	2.9%
Arts, entertainment, and recreation	315.9	2.1%
Accommodation and food services	1,010.1	6.6%
Other services	256.5	1.7%
Government and government enterprises:	*-292.2*	*-1.9%*
Federal civilian	-140.8	-0.9%
Military	0.0	0.0%
State and local	-151.4	-1.0%
All industry total	**$15,300.0**	**100.0%**

Notes: Major component sectors of the state's oil and gas cluster are highlighted.
Source: Bureau of Economic Analysis and RegionTrack calculations

VIII. Endnotes

[1] Bureau of Labor Statistics produces state-level industry measures by employment size only at the 2-digit NAICS level. The Mining sector (NAICS 21) is used as a proxy for the oil and gas cluster. The Mining sector (NAICS 21) captures slightly more of the industry than the three core sectors (NAICS 211, 213111, and 213112).

[2] EIA Short Term Energy Outlook. Release Date: October 2, 2025. https://www.eia.gov/outlooks/steo/

[3] Both royalty percentages and the share of royalties paid to nonresidents are calculated using historical royalty payment rosters provided by several oil and gas operators in Oklahoma. Royalties are deemed paid to a resident if the receiving postal address is in Oklahoma.

[4] Net exports are measured as state production minus state consumption as defined by EIA in the State Energy Data System (SEDS). Available online at: http://www.eia.gov/state/seds/

[5] Much of the increased earnings are traced to the conversion of corporate pipeline operating entities to various types of partnerships in recent years. This has shifted income from corporate taxation to treatment as pass-through income for individuals.

[6] Data on fixed private investment are generally not available at the state level and must be estimated from national data. We follow the common approach of apportioning national data on private fixed investment to the states using industry level data on a region's share of national earnings. A similar approach is used by the Bureau of Economic Analysis in deriving gross domestic product estimates at the state and metro area levels. State-level capital at the industry level is estimated using the approach of Garofalo and Yamarik as described in: Yamarik, Steven, 2013. "State-Level Capital and Investment: Updates and Implications." Contemporary Economic Policy, Vol. 31, Issue 1, pp. 62-72; and in Garofalo, Gasper A. and Steven Yamarik. 2002. "Regional Convergence: Evidence from a New State-by-State Capital Stock Series." Review of Economics and Statistics, 84:2, pp.316-323. The approach apportions state-level estimates from national investment data using state level earnings by industry. The regional earnings data at the industry level used to partition the national data contain missing and suppressed values. We estimate the missing values using a large-scale RAS approach. Priors for the estimation process are determined using either disclosed values across the full period or national industry ratios.

[7] For additional information on U.S. fixed investment by industry, see the National Income and Product Accounts (NIPA) available online at Bureau of Economic Analysis (www.bea.gov), Table 5.3.5 Private Fixed Investment by Type.

[8] By individual commodity, total spending on construction in Oklahoma is roughly equal in size to capital spending by the oil and gas industry. However, construction expenditures are traced to a variety of industries, as well as the household sector, rather than to just a single industry. Manufacturing is the most capital-intensive industry nationally, with oil and gas second. However, the high concentration of oil and gas in the state tips the balance well in favor of oil and gas in Oklahoma.

[9] RIMS (Regional Input-Output Modeling System) II multipliers are discussed in detail at: https://apps.bea.gov/regional/rims/rimsii/. Multipliers used in the report are based on the 2022 regional update of the 2017 U.S. input-output model underlying the RIMS II estimates.

[10] Caution must always be used when using input-output multipliers to assess the total 'contribution' or total economic activity 'supported' by an existing industry or firm. Input-output multipliers are intended to predict the change in economic activity that results from an incremental change in the current state of a regional economy. More specifically, the estimates provided for the oil and gas cluster reflect predictions from the RIMS II input-output model of the incremental impact that would result if cluster GDP expanded incrementally. The actual realized impact is determined by the unique adjustment process that would take place in the state as oil and gas activity changed.

[11] While the input-output approach provides a useful way to measure the extent of the economic interlinkages within a regional economy, the approach is not without shortcomings. The primary criticisms of the approach are misapplication of the models and the failure of the largely static approach to account for changes in other areas of the economy such as prices, wages, and traded activity. Despite these criticisms, careful application of the models can provide useful estimates of the total gross economic activity attributable to an individual industry, firm, or institution within a region. Input-output analysis is most appropriate when the policy change or stimulus does not alter production patterns, product prices, input prices, wage rates, or cost of capital. It is generally most useful when there are no capital or labor constraints.

[12] The three-step process of matching the components of the cluster to sectors, modeling the individual effects, and then aggregating the individual contributions of the components is often termed analysis-by-parts. It is technically equivalent to modeling the activity as a single entity, but the process can produce more appropriate impact estimates when the activities being modeled do not fit precisely within a single RIMS II industry sector.

[13] We do not attempt to formulate a comprehensive net cost-benefit analysis of the state's oil and gas cluster. There are many relevant components to a net analysis that extend well beyond the direct economic role of the cluster. These include social costs and benefits, alternative uses of state and local funding, alternative options for providing energy in the state, and the deadweight economic loss that can occur in the private sector because of taxpayer funding of services.

[14] Caution must be exercised when using input-output analysis to estimate the total economic activity 'supported' by an existing industry or firm. Input-output multipliers are designed to predict the gross changes in a regional economy resulting from a small, incremental change in its current structure. For an accessible discussion of how multiplier-based estimates of spillover effects are frequently misused and often overstate resulting spillover effects, see Hughes (2018) https://extension.tennessee.edu/publications/Documents/W644.pdf and Olfert and Stabler (1994) https://onlinelibrary.wiley.com/doi/abs/10.1111/j.1468-2257.1994.tb00155.x.

[15] We do not construct a counterfactual scenario that represents an alternative comparative view of the state economy that removes the oil and gas cluster and its various interrelationships from the structure of the model. Devising a sound counterfactual analysis that represents a

reasonable alternative use to oil and gas presents a considerable modeling challenge. It is not at all clear what the proper counterfactual should be in assessing the economic role of oil and gas production.

[16] For details on the estimation methodology, see the 2024 RegionTrack report on the effective tax rate in the sixteen largest producing states "*Oklahoma Oil and Gas Industry Taxation 2024: Comparative Effective Tax Rates in the Major Producing States*."

[17] The state's Constitutional Reserve Fund (CRF) is more commonly known as the Rainy Day Fund. The state legislature recently created the new Revenue Stabilization Fund (RSF) in 2018. A portion of collections from gross production and corporate income taxes above a threshold five-year average may be directed to the RSF. For more details, see: https://oklahoma.gov/content/dam/ok/en/omes/documents/bud22.pdf

[18] For detailed revenue and expenditure reports, see: https://sdeweb01.sde.ok.gov/OCAS_Reporting/StateReports.aspx. For a summary of current and historical apportionment, see: https://www.ok.gov/tax/Forms_&_Publications/Reports_&_Statistics/Apportionment_Charts_&_Formulas/index.html

[19] For the full apportionment rules for gross production tax in Oklahoma, see: http://www.oscn.net/applications/oscn/deliverdocument.asp?cite=68+O.S.+1004

[20] For a description of the Common Education Technology Revolving Fund, see: http://www.oscn.net/applications/oscn/DeliverDocument.asp?citeid=456863

[21] For access to the BEA gross domestic product data, see: https://www.bea.gov/data/gdp/gdp-state

[22] For details on the BEA methodology, see: https://www.bea.gov/sites/default/files/methodologies/0417_GDP_by_State_Methodology.pdf. For detailed coverage of taxes, see: https://apps.bea.gov/scb/2018/04-april/0418-preview-2018-comprehensive-nipa-update.htm

[23] BEA tracks employer contributions as a component of employee compensation.

[24] Taxes paid by wage and salary workers and self-employed proprietors working in the industry are significant as well. See for example: Snead, Mark C. and Amy A. Jones. 2019. "Oklahoma Oil and Gas Activity and Tax Contribution." RegionTrack Inc. for the Oklahoma State Chamber Research Foundation. Available online at: https://www.regiontrack.com/www/wp-content/uploads/Oklahoma-Oil-Gas-Impact-Taxes-2019-RegionTrack.pdf

[25] Most of the underlying tax estimates are built 'bottom-up' using either special tabulations at the state level, government finance data from the Census Bureau, or IRS tax receipts. The series also nets out any subsidies received by the industry. Totals are controlled to Census Bureau estimates for state and local tax payments received within each state to adjust for payments made within each state.

OKLAHOMA'S
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Oklahoma Energy Resources Board

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