



THE EMERGING U.S. METHANE MITIGATION INDUSTRY

Datu Research
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Executive Summary

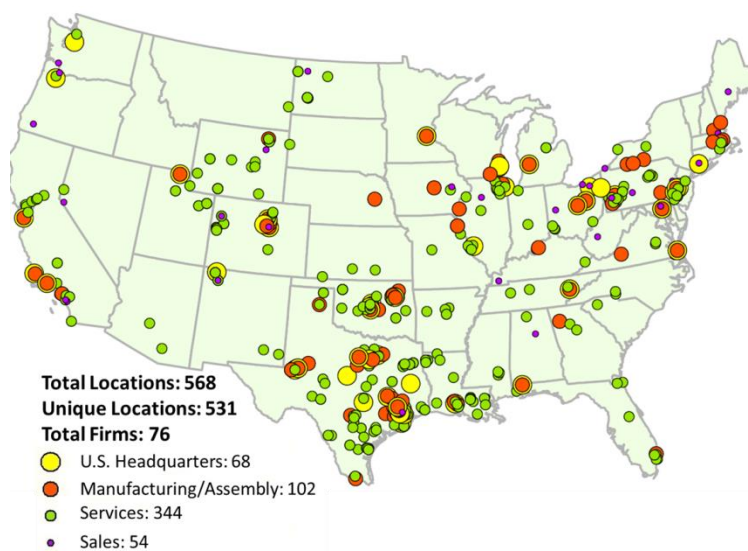
Methane is a powerful greenhouse gas. Over 20 years, each molecule of methane has 84 times the climate change potential of a molecule of carbon dioxide (IPCC 2013). The U.S. oil and natural gas system, including the production, gathering and processing, transmission, and distribution of natural gas, is the nation's largest industrial source of methane emissions (EPA 2014b). Methane emissions also present an economic challenge for the oil and gas industry. Total methane emissions across the oil and gas sector are estimated to be worth \$1.8 billion.¹ To help the oil and gas industry meet these challenges, dozens of companies from different backgrounds have developed technologies and services to reduce methane emissions. The result is a new and rapidly emerging methane mitigation industry.

Historically, many of the companies highlighted in this report have operated in broader markets as makers of valves or pneumatics or sealing technology. As the importance of controlling methane emissions from oil and natural gas production increases in the United States and internationally, these firms have an opportunity to grow, speak with one voice, and evolve to provide the oil and gas industry further solutions to address methane challenges.

The purpose of this national economic assessment is to identify and exhibit the companies that provide methane mitigation technologies and services. The following is a summary of our findings:

- At least 76 firms manufacture methane mitigation equipment in the U.S and/or offer services
- 59% of methane mitigation firms qualify as small businesses
- Methane mitigation companies provide U.S. jobs in at least 531 locations across 46 states
- The methane mitigation industry employs at least 30 key job types
- The median hourly wage for the industry is \$30.88, compared to \$19.60 for all U.S. jobs

U.S. map of employee locations in the methane mitigation industry²



¹ Per the EPA's 2014 emissions inventory of 7.7m metric tons, multiplied by the 12-month average Henry Hub gas price from August 2013-September 2014 per the EIA of \$4.38/mcf.

² [Click here](#) to explore an interactive map with the location and distribution of methane mitigation industry firms.