

oil companies. In 2005, significant foreign ownership existed, including British Petroleum, PLC, the fourth largest refiner, and Total SA, the French oil company. Second, the period since 1981 has seen significant merger and acquisition activity within the U.S. oil industry as oil companies sought to acquire expanded crude oil reserves as well as other assets through acquisition and merger with other firms. As a result of mergers, acquisitions, and corporate strategy, the ownership of many specific refineries has changed hands, even though the total capacity of the corporate entity has remained relatively stable. For example, the Bayway refinery in Linden, New Jersey, with a current capacity of 238,000 barrels per day was owned by ExxonMobil, but is now owned by ConocoPhillips; Conoco and Phillips Petroleum were separate companies in 2005. Third, the industry now has significant capacity operated by firms that are not integrated oil companies at all, but specialize in only a part of the petroleum supply chain. Fourth, specific joint venture organizations, (e.g., Motiva Enterprises) have been created to engage specifically in refining. Joint ventures have become common because they allow for significant cost and risk reductions through asset sharing and rationalization, but do not require the financial and institutional stresses of a more direct union through merger or acquisition.

Table 8. Top Twenty U.S. Refiners, 1988-2005
(thousand barrels per day)

1988		2005	
Company	Capacity	Company	Capacity
Exxon	1,517	ConocoPhillips Co	2,229
Standard of California	1,383	Valero	2,193
Standard of Illinois	1,238	ExxonMobil	1,860
Shell	1,123	BP PLC	1,475
Tenacoe	1,039	Chevron-Tenacoe	1,011
Gulf	949	Marathon Oil	974
Mobil	835	Samson	900
Atlantic Richfield	811	PDV America	812
Sun	521	Koch Industries	777
Marathon	513	Motiva Enterprises	746
Union	490	Teneco Corp	567
Ashland	462	Royal Dutch-Shell	534
Standard of Ohio	452	Deer Park Refining	531
Conoco	448	Liquidell	332
Phillips	397	Total SA	232
Circles Service	291	Chadron Refining	188
Union Pacific	283	Sinclair Oil	181
Coastal	278	Murphy Oil Corp	154
Gaffy	261	Frontier Oil Refining	153
Teneco	260	CRS Inc	136

Source: American Petroleum Institute, Basic Petroleum Data Book, Section VIII, Table 11, August 2006.

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**United States. Congress. House.
Committee on Government
Operations. Environment, Energy, and
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