

Released: December 2025

Next MECS will be fielded in 2027

Table 10.15 Percentage of establishments by levels of price difference that would cause fuel switching from natural gas to a less expensive substitute, 2022

Level: National data
Row: NAICS codes
Column: Levels of price difference
Unit: Establishment counts

		Levels of price difference that would cause a switch from natural gas ^c							
NAICS code ^a	Subsector and industry	Establishments able to switch ^b	Would not switch due to price	1 to 10 percent	11 to 25 percent	26 to 50 percent	Over 50 percent	Estimate cannot be provided	Would switch to more expensive substitute
Total United States									
311	Food	608	Q	38	117	Q	34	106	21
3112	Grain and Oilseed Milling	51	Q	4	14	D	Q	D	0
311221	Wet Corn Milling and Starch Manufacturing	7	D	D	D	0	0	D	0
31131	Sugar Manufacturing	D	0	0	0	0	D	0	D
3114	Fruit and Vegetable Preserving and Specialty Food	D	8	D	4	7	0	8	0
3115	Dairy Product Manufacturing	94	Q	D	17	Q	D	17	D
3116	Animal Slaughtering and Processing	122	11	D	Q	Q	D	40	D
312	Beverage and Tobacco Products	197	Q	D	Q	Q	Q	D	4
3121	Beverages	187	Q	D	Q	D	Q	Q	4
3122	Tobacco	10	3	0	0	D	3	D	0
313	Textile Mills	63	D	0	10	D	D	D	D
314	Textile Product Mills	Q	D	0	Q	D	0	Q	0
315	Apparel	9	0	0	D	0	D	0	Q
316	Leather and Allied Products	0	0	0	0	0	0	0	0
321	Wood Products	153	D	5	3	15	D	Q	0
321113	Sawmills	16	D	0	3	7	D	3	0
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing	16	0	5	0	3	0	Q	0
321219	Reconstituted Wood Products	0	0	0	0	0	0	0	0
3219	Other Wood Products	121	Q	0	0	6	0	Q	0
322	Paper	216	Q	14	14	5	3	37	0
322110	Pulp Mills	9	D	D	D	0	0	D	0
322120	Paper Mills	14	D	D	3	D	D	5	0
322130	Paperboard Mills	38	4	10	8	D	D	13	0
323	Printing and Related Support	Q	0	0	Q	Q	0	Q	0
324	Petroleum and Coal Products	161	21	Q	22	10	19	71	5
324110	Petroleum Refineries	24	D	5	D	0	D	7	5
324121	Asphalt Paving Mixture and Block	126	D	Q	18	D	D	60	0
324122	Asphalt Shingle and Coating Materials	D	D	0	D	D	0	D	0
324191	Petroleum Lubricating Oil and Grease Manufacturing	0	0	0	0	0	0	0	0
324199	All Other Petroleum and Coal Products Manufacturing	D	D	0	0	0	0	D	0
325	Chemicals	443	41	31	11	Q	20	Q	Q
325110	Petrochemicals	D	0	D	0	0	D	0	0
325120	Industrial Gases	Q	0	0	0	D	0	D	0
325180	Other Basic Inorganic Chemical Manufacturing	Q	D	0	D	0	0	Q	0
325193	Ethyl Alcohol	0	0	0	0	0	0	0	0
325194	Cyclic Crudes, Intermediate and Gum and Wood Chemicals	9	0	0	0	0	9	0	0
325199	All Other Basic Organic Chemical Manufacturing	40	Q	4	D	D	D	28	0
325211	Plastics Materials and Resins	Q	3	0	D	Q	0	D	0
325212	Synthetic Rubber	5	D	0	0	0	D	D	0
325220	Artificial and Synthetic Fibers and Filaments	12	0	D	D	D	4	4	0
325311	Nitrogenous Fertilizers	6	D	0	4	D	0	0	0
325312	Phosphatic Fertilizers	D	0	0	0	0	0	D	0
3254	Pharmaceuticals and Medicines	72	20	D	D	Q	Q	D	D
325412	Pharmaceutical Preparation	52	8	Q	0	Q	Q	10	0
325992	Photographic Film, Paper, Plate, Chemical, and Copy Toner Manufacturing	10	6	0	0	0	0	4	0
326	Plastics and Rubber Products	373	Q	D	D	Q	0	D	Q

327	Nonmetallic Mineral Products	486	Q	Q	Q	4	Q	Q	3
327120	Clay Building Material and Refractories	18	D	4	D	D	D	7	0
327211	Flat Glass	9	0	0	0	0	0	9	0
327212	Other Pressed and Blown Glass and Glassware	16	3	0	0	0	Q	7	0
327213	Glass Containers	0	0	0	0	0	0	0	0
327215	Glass Products from Purchased Glass	Q	D	D	3	0	0	3	D
327310	Cements	24	3	D	3	0	D	12	D
327410	Lime	9	0	0	0	D	0	D	0
327420	Gypsum	0	0	0	0	0	0	0	0
327993	Mineral Wool	4	0	0	0	D	0	D	0
331	Primary Metals	132	24	4	33	7	22	37	5
331110	Iron and Steel Mills and Ferroalloys	7	3	0	0	0	0	3	0
3312	Steel Products from Purchased Steel	27	D	0	16	0	D	D	D
3313	Alumina and Aluminum Production and Processing	7	3	0	0	D	0	D	D
331314	Secondary Smelting and Alloying of Aluminum	0	0	0	0	0	0	0	0
331315	Aluminum Sheet, Plate and Foils	D	D	0	0	0	0	0	0
331318	Other Aluminum Rolling, Drawing and Extruding	D	D	0	0	D	0	D	D
3314	Nonferrous Metal (except Aluminum) Production and Processing	24	D	0	7	D	6	6	D
331410	Nonferrous Metal (except Aluminum) Smelting and Refining	D	D	0	0	0	0	0	0
3315	Foundries	67	14	4	9	D	D	21	D
331511	Iron Foundries	21	Q	D	D	D	0	Q	D
331523	Nonferrous Metal Die-Casting Foundries	25	0	D	4	D	D	Q	0
331524	Aluminum Foundries, except Die-Casting	D	D	0	0	0	0	0	0
332	Fabricated Metal Products	1,497	617	Q	Q	0	Q	Q	0
333	Machinery	534	Q	0	Q	Q	Q	Q	0
334	Computer and Electronic Products	Q	18	0	4	Q	0	Q	0
334413	Semiconductors and Related Devices	32	18	0	4	0	0	10	0
335	Electrical Equipment, Appliances, and Components	Q	D	0	0	0	0	D	0
336	Transportation Equipment	246	D	3	3	D	4	Q	D
336110	Automobile and Light Duty Motor Vehicle Manufacturing	D	D	0	0	D	0	0	0
3364	Aerospace Product and Parts	D	D	3	3	0	4	Q	D
336411	Aircraft	D	0	0	0	0	D	4	0
337	Furniture and Related Products	350	Q	0	Q	Q	0	0	Q
339	Miscellaneous	404	Q	0	Q	0	0	Q	Q
	Total	6,438	1,748	363	944	752	203	1,911	516

Data source: U.S. Energy Information Administration, Office of Energy Demand and Integrated Statistics, Form EIA-846, 2022 *Manufacturing Energy Consumption Survey*

Note: Totals may not equal sum of components because of independent rounding. Establishment percentage may not equal 100% because of unknown and/or unreported fuel-switching guesstimate.

^a The Bureau of the Census classifies establishments using the 2022 North American Industry Classification System (NAICS).

^b This count includes only those establishments that reported this activity in 2022.

^c These levels of price difference were guesstimates at which establishments perceived that they would switch. These levels were not actual values at which switching occurred. The percentage of price difference is computed as the quantity of (current fuel price minus alternative fuel price) divided by the current fuel price, expressed as a percentage.

* Estimate less than 0.5

D=Withheld to avoid disclosing data for individual establishments

Q=Withheld because relative standard error (RSE) is greater than 50%

NA=Not available

The Census Bureau has reviewed this data product to ensure appropriate access, use, and disclosure protection of the confidential source data (Project No. 7504703, Disclosure Review Board (DRB) approval number: CBDRB-FY25-0054).

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RSE Table 10.15 Relative standard errors for Table 10.15

Unit: Percentage

NAICS code ^a	Subsector and industry	Establishments able to switch ^b	Levels of price difference that would cause a switch from natural gas ^c					Estimate cannot be provided	Would switch to more expensive substitute
			Would not switch due to price	1 to 10 percent	11 to 25 percent	26 to 50 percent	Over 50 percent		
Total United States									
311	Food	23.4	50.3	48.7	43.7	81.6	41.6	29.6	46.9
3112	Grain and Oilseed Milling	27.5	55.1	31.5	27.4	D	90.4	D	X
311221	Wet Corn Milling and Starch Manufacturing	0.0	D	D	D	X	X	D	X
31131	Sugar Manufacturing	D	X	X	X	X	D	X	D
3114	Fruit and Vegetable Preserving and Specialty Food	D	23.0	D	39.9	6.0	X	40.3	X
3115	Dairy Product Manufacturing	24.8	54.8	D	35.6	60.8	D	34.7	D
3116	Animal Slaughtering and Processing	29.0	19.2	D	75.5	63.0	D	34.9	D
312	Beverage and Tobacco Products	42.6	66.6	D	59.4	67.2	83.5	D	0.0
3121	Beverages	44.8	68.9	D	59.4	D	95.0	93.1	0.0
3122	Tobacco	0.0	0.0	X	X	D	0.0	D	X
313	Textile Mills	44.0	D	X	41.2	D	D	D	D
314	Textile Product Mills	59.4	D	X	80.6	D	X	71.2	X
315	Apparel	48.2	X	X	D	X	D	X	80.2
316	Leather and Allied Products	X	X	X	X	X	X	X	X
321	Wood Products	35.9	D	20.2	0.0	22.8	D	53.6	X
321113	Sawmills	17.6	D	X	0.0	31.9	D	23.7	X
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing	31.6	X	20.2	X	0.0	X	66.8	X
321219	Reconstituted Wood Products	X	X	X	X	X	X	X	X
3219	Other Wood Products	45.1	70.5	X	X	48.8	X	63.1	X
322	Paper	44.0	65.5	0.0	0.0	0.0	0.0	42.0	X
322110	Pulp Mills	0.0	D	D	D	X	X	D	X
322120	Paper Mills	0.0	D	D	0.0	D	D	0.0	X
322130	Paperboard Mills	0.0	0.0	0.0	0.0	D	D	0.0	X
323	Printing and Related Support	66.0	X	X	88.8	69.9	X	62.1	X
324	Petroleum and Coal Products	10.5	6.9	51.6	28.2	22.8	32.6	17.9	0.0
324110	Petroleum Refineries	0.0	D	0.0	D	X	D	0.0	0.0
324121	Asphalt Paving Mixture and Block	13.4	D	86.6	33.5	D	D	21.4	X
324122	Asphalt Shingle and Coating Materials	D	D	X	D	D	X	D	X
324191	Petroleum Lubricating Oil and Grease Manufacturing	X	X	X	X	X	X	X	X
324199	All Other Petroleum and Coal Products Manufacturing	D	D	X	X	X	X	D	X
325	Chemicals	30.5	7.8	34.2	4.1	61.3	14.8	51.6	97.3
325110	Petrochemicals	D	X	D	X	X	D	X	X
325120	Industrial Gases	93.0	X	X	X	D	X	D	X
325180	Other Basic Inorganic Chemical Manufacturing	55.3	D	X	D	X	X	73.9	X
325193	Ethyl Alcohol	X	X	X	X	X	X	X	X
325194	Cyclic Crudes, Intermediate and Gum and Wood Chemicals	0.0	X	X	X	X	0.0	X	X
325199	All Other Basic Organic Chemical Manufacturing	28.1	68.4	44.3	D	D	D	38.6	X
325211	Plastics Materials and Resins	64.4	5.4	X	D	96.2	X	D	X
325212	Synthetic Rubber	0.0	D	X	X	X	D	D	X
325220	Artificial and Synthetic Fibers and Filaments	0.0	X	D	D	D	0.0	0.0	X
325311	Nitrogenous Fertilizers	0.0	D	X	0.0	D	X	X	X
325312	Phosphatic Fertilizers	D	X	X	X	X	X	D	X
3254	Pharmaceuticals and Medicines	30.9	5.8	D	D	95.3	65.0	D	D
325412	Pharmaceutical Preparation	42.2	9.4	60.0	X	95.3	65.0	0.0	X
325992	Photographic Film, Paper, Plate, Chemical, and Copy Toner Manufacturing	0.0	0.0	X	X	X	X	0.0	X

326	Plastics and Rubber Products	39.7	99.0	D	D	69.3	X	D	95.9
327	Nonmetallic Mineral Products	41.3	65.2	60.5	67.9	0.0	53.0	68.0	38.6
327120	Clay Building Material and Refractories	18.7	D	34.3	D	D	D	40.6	X
327211	Flat Glass	0.0	X	X	X	X	X	0.0	X
327212	Other Pressed and Blown Glass and Glassware	36.7	17.4	X	X	X	84.1	49.0	X
327213	Glass Containers	X	X	X	X	X	X	X	X
327215	Glass Products from Purchased Glass	63.4	D	D	0.0	X	X	37.9	D
327310	Cements	10.5	0.0	D	0.0	X	D	0.0	D
327410	Lime	0.0	X	X	X	D	X	D	X
327420	Gypsum	X	X	X	X	X	X	X	X
327993	Mineral Wool	0.0	X	X	X	D	X	D	X
331	Primary Metals	11.5	15.6	8.3	26.1	4.6	42.6	20.9	0.0
331110	Iron and Steel Mills and Ferroalloys	0.0	0.0	X	X	X	X	0.0	X
3312	Steel Products from Purchased Steel	29.8	D	X	49.3	X	D	D	D
3313	Alumina and Aluminum Production and Processing	0.0	0.0	X	X	D	X	D	D
331314	Secondary Smelting and Alloying of Aluminum	X	X	X	X	X	X	X	X
331315	Aluminum Sheet, Plate and Foils	D	D	X	X	X	X	X	X
331318	Other Aluminum Rolling, Drawing and Extruding	D	D	X	X	D	X	D	D
3314	Nonferrous Metal (except Aluminum) Production and Processing	9.4	D	X	18.6	D	0.0	29.5	D
331410	Nonferrous Metal (except Aluminum) Smelting and Refining	D	D	X	X	X	X	X	X
3315	Foundries	18.8	25.6	8.3	29.7	D	D	35.1	D
331511	Iron Foundries	31.0	60.4	D	D	D	X	61.7	D
331523	Nonferrous Metal Die-Casting Foundries	40.3	X	D	0.0	D	D	77.7	X
331524	Aluminum Foundries, except Die-Casting	D	D	X	X	X	X	X	X
332	Fabricated Metal Products	30.8	49.3	74.4	99.5	X	82.2	54.5	X
333	Machinery	36.9	99.0	X	69.9	80.9	96.1	52.7	X
334	Computer and Electronic Products	50.1	0.0	X	48.6	71.1	X	85.7	X
334413	Semiconductors and Related Devices	6.9	0.0	X	48.6	X	X	12.1	X
335	Electrical Equipment, Appliances, and Components	92.6	D	X	X	X	X	D	X
336	Transportation Equipment	49.2	D	0.0	18.9	D	26.4	67.0	D
336110	Automobile and Light Duty Motor Vehicle Manufacturing	D	D	X	X	D	X	X	X
3364	Aerospace Product and Parts	D	D	0.0	18.9	X	26.4	62.5	D
336411	Aircraft	D	X	X	X	X	D	0.0	X
337	Furniture and Related Products	46.2	79.5	X	98.1	50.6	X	X	69.8
339	Miscellaneous	43.7	99.0	X	97.1	X	X	73.3	71.6
	Total	10.8	22.5	47.2	28.2	31.1	22.2	19.6	39.1

Data source: U.S. Energy Information Administration, Office of Energy Demand and Integrated Statistics, Form EIA-846, 2022 *Manufacturing Energy Consumption Survey*

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* Estimate less than 0.5

D=Withheld to avoid disclosing data for individual establishments

Q=Withheld because relative standard error (RSE) is greater than 50%

NA=Not available

X=Not defined because RSE corresponds to a data table value of zero

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