

Released: December 2025

Next MECS will be fielded in 2027

**Table 10.17 Percentage of establishments by levels of price difference that would cause fuel switching from HGL (excluding natural gasoline) to a less expensive substitute, 2022**

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

NAICS code <sup>a</sup>	Subsector and industry	Establishments able to switch <sup>b</sup>	Levels of price difference that would cause a switch from HGL <sup>c</sup>					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	Q	6	D	D	0	D	Q	Q
3112	Grain and Oilseed Milling	4	0	0	D	0	0	D	0
311221	Wet Corn Milling and Starch Manufacturing	0	0	0	0	0	0	0	0
31131	Sugar Manufacturing	D	0	0	0	0	D	0	0
3114	Fruit and Vegetable Preserving and Specialty Food	D	3	D	Q	0	0	D	0
3115	Dairy Product Manufacturing	4	D	0	D	0	0	D	0
3116	Animal Slaughtering and Processing	Q	D	0	D	0	0	D	0
312	Beverage and Tobacco Products	Q	D	D	Q	D	0	Q	0
3121	Beverages	D	0	D	Q	D	0	Q	0
3122	Tobacco	D	D	0	0	0	0	0	0
313	Textile Mills	Q	D	0	0	0	Q	D	0
314	Textile Product Mills	0	0	0	0	0	0	0	0
315	Apparel	D	0	0	D	0	0	0	0
316	Leather and Allied Products	D	0	0	0	0	0	D	0
321	Wood Products	155	D	D	Q	5	5	Q	Q
321113	Sawmills	Q	Q	0	0	D	5	D	0
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing	Q	D	D	0	0	0	0	Q
321219	Reconstituted Wood Products	D	0	0	0	0	0	0	0
3219	Other Wood Products	Q	0	0	Q	D	0	D	0
322	Paper	D	Q	D	0	0	D	0	3
322110	Pulp Mills	0	0	0	0	0	0	0	0
322120	Paper Mills	3	D	0	0	0	0	0	D
322130	Paperboard Mills	D	0	D	0	0	D	0	0
323	Printing and Related Support	Q	0	0	0	0	D	D	0
324	Petroleum and Coal Products	46	3	5	0	D	D	26	D
324110	Petroleum Refineries	17	D	D	0	0	D	D	D
324121	Asphalt Paving Mixture and Block	24	D	0	0	D	0	17	0
324122	Asphalt Shingle and Coating Materials	D	0	0	0	0	0	D	0
324191	Petroleum Lubricating Oil and Grease Manufacturing	D	0	D	0	0	0	0	D
324199	All Other Petroleum and Coal Products Manufacturing	0	0	0	0	0	0	0	0
325	Chemicals	433	Q	9	Q	4	5	Q	Q
325110	Petrochemicals	12	12	0	0	0	0	0	0
325120	Industrial Gases	Q	0	0	Q	0	0	0	0
325180	Other Basic Inorganic Chemical Manufacturing	16	D	0	0	D	0	Q	3
325193	Ethyl Alcohol	Q	0	0	Q	0	0	0	0
325194	Cyclic Crudes, Intermediate and Gum and Wood Chemicals	0	0	0	0	0	0	0	0
325199	All Other Basic Organic Chemical Manufacturing	6	0	D	0	0	D	D	0
325211	Plastics Materials and Resins	Q	Q	D	0	0	0	D	0
325212	Synthetic Rubber	4	0	0	0	0	0	4	0
325220	Artificial and Synthetic Fibers and Filaments	D	D	0	0	0	0	0	0
325311	Nitrogenous Fertilizers	7	0	D	D	0	0	D	0
325312	Phosphatic Fertilizers	D	D	0	0	D	0	0	0
3254	Pharmaceuticals and Medicines	9	0	D	0	0	D	5	0
325412	Pharmaceutical Preparation	D	0	D	0	0	D	0	0
325992	Photographic Film, Paper, Plate, Chemical, and Copy Toner Manufacturing	0	0	0	0	0	0	0	0
326	Plastics and Rubber Products	Q	D	0	0	Q	0	Q	D

327	Nonmetallic Mineral Products	D	0	D	Q	3	D	15	Q
327120	Clay Building Material and Refractories	10	0	D	0	3	D	D	0
327211	Flat Glass	D	0	0	0	0	0	D	0
327212	Other Pressed and Blown Glass and Glassware	4	0	0	0	0	0	4	0
327213	Glass Containers	0	0	0	0	0	0	0	0
327215	Glass Products from Purchased Glass	5	0	0	0	0	D	D	0
327310	Cements	D	0	0	0	0	0	D	0
327410	Lime	0	0	0	0	0	0	0	0
327420	Gypsum	D	0	0	0	0	0	D	0
327993	Mineral Wool	0	0	0	0	0	0	0	0
331	Primary Metals	108	12	8	15	14	14	36	7
331110	Iron and Steel Mills and Ferroalloys	5	D	D	0	0	0	D	0
3312	Steel Products from Purchased Steel	12	D	0	0	0	Q	D	D
3313	Alumina and Aluminum Production and Processing	17	D	3	D	D	0	9	0
331314	Secondary Smelting and Alloying of Aluminum	3	0	3	0	0	0	0	0
331315	Aluminum Sheet, Plate and Foils	3	D	0	0	0	0	D	0
331318	Other Aluminum Rolling, Drawing and Extruding	6	0	0	D	D	0	D	0
3314	Nonferrous Metal (except Aluminum) Production and Processing	25	D	0	D	Q	4	D	D
331410	Nonferrous Metal (except Aluminum) Smelting and Refining	D	D	0	0	0	0	D	0
3315	Foundries	48	4	D	8	D	3	16	3
331511	Iron Foundries	14	D	D	4	Q	0	0	D
331523	Nonferrous Metal Die-Casting Foundries	9	0	D	D	D	0	D	0
331524	Aluminum Foundries, except Die-Casting	6	D	0	0	0	0	D	D
332	Fabricated Metal Products	469	D	0	0	0	D	Q	Q
333	Machinery	Q	0	0	Q	0	0	Q	Q
334	Computer and Electronic Products	6	3	0	0	0	0	D	D
334413	Semiconductors and Related Devices	6	3	0	0	0	0	D	D
335	Electrical Equipment, Appliances, and Components	Q	0	0	0	0	0	Q	0
336	Transportation Equipment	138	Q	0	Q	D	D	Q	D
336110	Automobile and Light Duty Motor Vehicle Manufacturing	D	0	0	0	0	0	D	0
3364	Aerospace Product and Parts	Q	Q	0	0	D	Q	Q	D
336411	Aircraft	0	0	0	0	0	0	0	0
337	Furniture and Related Products	Q	0	0	0	Q	0	Q	0
339	Miscellaneous	Q	Q	0	Q	0	0	Q	0
	Total	2,658	683	Q	353	Q	78	964	242

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.

<sup>a</sup> The Bureau of the Census classifies establishments using the 2022 North American Industry Classification System (NAICS).

<sup>b</sup> This count includes only those establishments that reported this activity in 2022.

<sup>c</sup> 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 10.17 Relative standard errors for Table 10.17**

Unit: Percentage

NAICS code <sup>a</sup>	Subsector and industry	Establishments able to switch <sup>b</sup>	Levels of price difference that would cause a switch from HGL <sup>c</sup>					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	59.8	0.0	D	D	X	D	57.3	95.1	
3112	Grain and Oilseed Milling	0.0	X	X	D	X	X	D		
311221	Wet Corn Milling and Starch Manufacturing	X	X	X	X	X	X	X	X	
31131	Sugar Manufacturing	D	X	X	X	X	D	X	X	
3114	Fruit and Vegetable Preserving and Specialty Food	D	0.0	D	86.2	X	X	D	X	
3115	Dairy Product Manufacturing	4.2	D	X	D	X	X	D	X	
3116	Animal Slaughtering and Processing	52.5	D	X	D	X	X	D	X	
312	Beverage and Tobacco Products	72.9	D	D	59.4	D	X	84.4	X	
3121	Beverages	D	X	D	59.4	D	X	84.4	X	
3122	Tobacco	D	D	X	X	X	X	X	X	
313	Textile Mills	56.0	D	X	X	X	97.2	D	X	
314	Textile Product Mills	X	X	X	X	X	X	X	X	
315	Apparel	D	X	X	D	X	X	X	X	
316	Leather and Allied Products	D	X	X	X	X	X	D	X	
321	Wood Products	36.5	D	D	96.1	0.0	38.7	58.0	80.4	
321113	Sawmills	66.8	55.5	X	X	D	38.7	D	X	
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing	62.0	D	D	X	X	X	X	80.4	
321219	Reconstituted Wood Products	D	X	X	X	X	X	X	X	
3219	Other Wood Products	57.3	X	X	96.1	D	X	D	X	
322	Paper	D	97.7	D	X	X	D	X	0.0	
322110	Pulp Mills	X	X	X	X	X	X	X	X	
322120	Paper Mills	0.0	D	X	X	X	X	X	D	
322130	Paperboard Mills	D	X	D	X	X	D	X	X	
323	Printing and Related Support	82.3	X	X	X	X	D	D	X	
324	Petroleum and Coal Products	10.1	31.2	0.0	X	D	D	15.6	D	
324110	Petroleum Refineries	0.0	D	D	X	X	D	D	D	
324121	Asphalt Paving Mixture and Block	19.6	D	X	X	D	X	23.2	X	
324122	Asphalt Shingle and Coating Materials	D	X	X	X	X	X	D	X	
324191	Petroleum Lubricating Oil and Grease Manufacturing	D	X	D	X	X	X	X	D	
324199	All Other Petroleum and Coal Products Manufacturing	X	X	X	X	X	X	X	X	
325	Chemicals	36.2	66.2	44.2	55.9	24.2	8.5	66.7	95.3	
325110	Petrochemicals	0.0	0.0	X	X	X	X	X	X	
325120	Industrial Gases	94.4	X	X	94.4	X	X	X	X	
325180	Other Basic Inorganic Chemical Manufacturing	30.7	D	X	X	D	X	55.4	30.6	
325193	Ethyl Alcohol	68.8	X	X	68.8	X	X	X	X	
325194	Cyclic Crudes, Intermediate and Gum and Wood Chemicals	X	X	X	X	X	X	X	X	
325199	All Other Basic Organic Chemical Manufacturing	7.7	X	D	X	X	D	D	X	
325211	Plastics Materials and Resins	67.9	96.9	D	X	X	X	D	X	
325212	Synthetic Rubber	0.0	X	X	X	X	X	0.0	X	
325220	Artificial and Synthetic Fibers and Filaments	D	D	X	X	X	X	X	X	
325311	Nitrogenous Fertilizers	0.0	X	D	D	X	X	D	X	
325312	Phosphatic Fertilizers	D	D	X	X	D	X	X	X	
3254	Pharmaceuticals and Medicines	0.0	X	D	X	X	D	0.0	X	
325412	Pharmaceutical Preparation	D	X	D	X	X	D	X	X	
325992	Photographic Film, Paper, Plate, Chemical, and Copy Toner Manufacturing	X	X	X	X	X	X	X	X	
326	Plastics and Rubber Products	74.7	D	X	X	99.0	X	90.0	D	
327	Nonmetallic Mineral Products	D	X	D	99.0	0.0	D	0.0	93.0	
327120	Clay Building Material and Refractories	6.0	X	D	X	0.0	D	D		

327211	Flat Glass	D	X	X	X	X	X	D	X
327212	Other Pressed and Blown Glass and Glassware	0.0	X	X	X	X	X	0.0	X
327213	Glass Containers	X	X	X	X	X	X	X	X
327215	Glass Products from Purchased Glass	18.4	X	X	X	X	D	D	X
327310	Cements	D	X	X	X	X	X	D	X
327410	Lime	X	X	X	X	X	X	X	X
327420	Gypsum	D	X	X	X	X	X	D	X
327993	Mineral Wool	X	X	X	X	X	X	X	X
331	Primary Metals	10.0	0.0	22.1	21.6	39.2	28.6	20.7	19.5
331110	Iron and Steel Mills and Ferroalloys	0.0	D	D	X	X	X	D	X
3312	Steel Products from Purchased Steel	31.2	D	X	X	X	51.9	D	D
3313	Alumina and Aluminum Production and Processing	10.6	D	0.0	D	D	X	0.0	X
331314	Secondary Smelting and Alloying of Aluminum	0.0	X	0.0	X	X	X	X	X
331315	Aluminum Sheet, Plate and Foils	0.0	D	X	X	X	X	D	X
331318	Other Aluminum Rolling, Drawing and Extruding	32.5	X	X	D	D	X	D	X
3314	Nonferrous Metal (except Aluminum) Production and Processing	18.4	D	X	D	71.9	31.0	D	D
331410	Nonferrous Metal (except Aluminum) Smelting and Refining	D	D	X	X	X	X	D	X
3315	Foundries	18.1	0.0	D	32.1	D	24.9	40.0	29.0
331511	Iron Foundries	36.1	D	D	38.0	81.7	X	X	D
331523	Nonferrous Metal Die-Casting Foundries	41.6	X	D	D	D	X	D	X
331524	Aluminum Foundries, except Die-Casting	16.2	D	X	X	X	X	D	D
332	Fabricated Metal Products	49.7	D	X	X	X	D	70.1	99.0
333	Machinery	65.8	X	X	99.0	X	X	65.9	88.0
334	Computer and Electronic Products	0.0	0.0	X	X	X	X	D	D
334413	Semiconductors and Related Devices	0.0	0.0	X	X	X	X	D	D
335	Electrical Equipment, Appliances, and Components	98.9	X	X	X	X	X	98.9	X
336	Transportation Equipment	45.4	92.8	X	98.0	D	D	55.1	D
336110	Automobile and Light Duty Motor Vehicle Manufacturing	D	X	X	X	X	X	D	X
3364	Aerospace Product and Parts	56.7	92.8	X	X	D	72.4	80.4	D
336411	Aircraft	X	X	X	X	X	X	X	X
337	Furniture and Related Products	92.1	X	X	X	99.0	X	55.0	X
339	Miscellaneous	56.0	70.3	X	87.5	X	X	99.0	X
	Total	16.0	35.8	74.0	43.3	56.4	34.5	26.0	47.6

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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