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# Oilfield Chemicals: United States

January 2020



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# About This Report

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## Scope

This report forecasts to 2023 US oilfield chemical demand in nominal US dollars at the manufacturer level.

The total value of chemicals used in oilfield applications is measured at two levels:

- application level, which measures formulated oilfield products
- base product level

Total demand for formulated oilfield chemicals is segmented by application in terms of:

- stimulation fluid additives
- drilling fluid additives
- production chemicals
- enhanced oil recovery (EOR) products
- completion and workover fluid additives
- cement additives

Total demand for oilfield chemicals is also segmented by product as follows:

- specialty chemicals
- commodity chemicals
- polymers
- gases

To illustrate historical trends, total oilfield chemical demand is provided in annual series from 2008 to 2018; the various segments are reported at five-year intervals for 2008, 2013, and 2018.

Excluded from the scope of this report are:

- proppants, which are used in hydraulic fracturing
- gas reinjection, whether considered part of secondary or tertiary recovery

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

## Sources

*Oilfield Chemicals: United States* (FF35023) is based on *Oilfield Chemicals*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

## Industry Codes

Table 5 | NAICS & SIC Codes Related to Oilfield Chemicals

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
213111	Drilling Oil and Gas Wells	1381	Drilling Oil and Gas Wells
213112	Support Activities for Oil and Gas Operations	1389	Oil and Gas Field Services, NEC
325180	Other Basic Inorganic Chemical Mfg	2819	Industrial Inorganic Chemicals, NEC
325199	All Other Basic Organic Chemical Mfg	2869	Industrial Organic Chemicals, NEC

Source: US Census Bureau

## Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both

## About This Report

top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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## Resources

### The Freedonia Group

*Oilfield Chemicals*

### Freedonia Industry Studies

*Cement & Concrete Additives*

*Drilling Fluids & Chemicals Market in the US*

*Global Cement*

*Global Cement & Concrete Additives*

*Global Fiber Cement*

*Global Industrial Enzymes Market*

*Global Industrial Silica Sand*

*Global Pumps Market*

*Proppants Market in North America*

*Specialty Surfactants*

### Freedonia Focus Reports

*Crude Petroleum: United States*

*Energy: United States*

*Natural Gas: United States*

*Refined Petroleum Products: United States*

### Freedonia Custom Research

### Trade Publications

*The American Oil & Gas Reporter*

*Drilling Contractor*

*E&P*

*Hydrocarbon Processing*

*ICIS Chemical Business*

*Offshore*

*Offshore Technology*

*Oil & Gas Journal*

*Oil Price*

*Oilfield Technology*

*Petroleum Economist*

*Rigzone*

*SHALE Oil & Gas Business Magazine*

*World Oil*

### **Agencies & Associations**

International Association of Drilling Contractors

National Drilling Association

United States Census Bureau

United States Department of Energy

United States Environmental Protection Agency

United States Geological Survey

United States International Trade Commission

US Oil & Gas Association