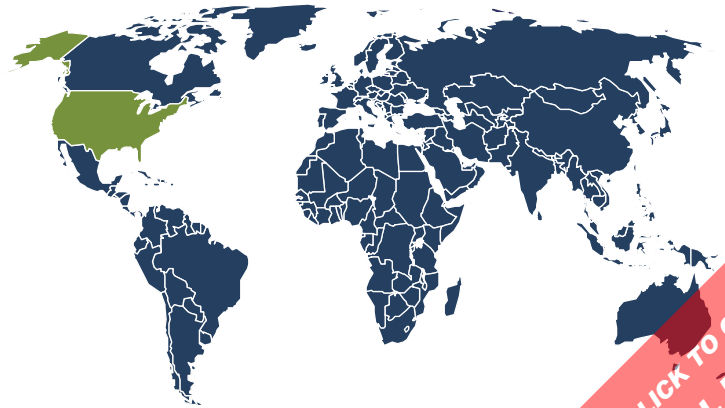


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# Well Stimulation Materials: United States

June 2014



## Highlights

### Industry Overview

Market Size and Trends | Product Segmentation | Regional Segmentation | Technology  
Environmental and Regulatory Factors

### Demand Forecasts

Market Environment | Product Forecasts | Regional Forecasts

### Industry Structure

Industry Composition and Characteristics | Additional Companies Cited

### Resources

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## ABOUT THIS REPORT

### Scope & Method

This report forecasts US well stimulation material demand in US dollars at the manufacturers' level to 2018. Total demand is segmented in terms of:

- proppants
- polymer gelling agents
- other base fluid materials
- fluid additives
- other well stimulation materials such as frac plugs and perforation ball sealers.

Total demand is also segmented by region as follows:

- Southern region
- Midwestern region
- Western region
- Eastern region.

To illustrate historical trends, total demand is provided in an annual series from 2003 to 2013; the various segments are reported at five-year intervals for 2008 and 2013. Forecasts are developed via the identification and analysis of pertinent statistical relationships and other historical trends/events as well as their expected progression/impact over the forecast period. Changes in quantities between reported years of a given total or segment are typically provided in terms of five-year compound annual growth rates (CAGRs). For the sake of brevity, forecasts are generally stated in smoothed CAGR-based descriptions to the forecast year, such as “demand is projected to rise 3.2% annually through 2018.” The result of any particular year over that period, however, may exhibit volatility and depart from a smoothed, long-term trend, as historical data typically illustrate.

Key macroeconomic indicators are also provided at five-year intervals with CAGRs for the years corresponding to other reported figures. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the [Table of Contents](#).

### Sources

*Well Stimulation Materials: United States* is based on [Well Stimulation Materials](#), a comprehensive industry study published by The Freedonia Group in June 2014. Reported findings represent the synthesis and analysis of data from various primary,

secondary, macroeconomic, and demographic sources including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- national, regional, and international non-governmental organizations
- trade associations and their publications
- the business and trade press
- The Freedonia Group Consensus Forecasts dated April 2014
- the findings of other industry 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

The topic of this report is related to the following industry codes:

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industry Codes	
211111	Crude Petroleum and Natural Gas Extraction	1311	Crude Petroleum and Natural Gas
		1381	Drilling Oil and Gas Wells
212322	Industrial Sand Mining	1446	Industrial Sand
213111	Drilling Oil and Gas Wells	2813	Industrial Gases
325120	Industrial Gas Manufacturing	2899	Chemicals and Chemical Preparations, NEC
325998	All Other Miscellaneous Chemical Product and Preparation Manufacturing		

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