

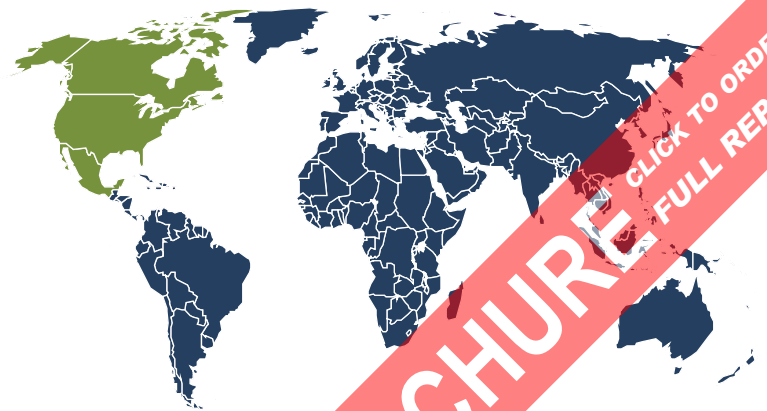
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# Proppants:

## North America

July 2017



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# About This Report

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## Scope & Method

This report forecasts North American proppant demand in pounds to 2021. Total demand is segmented by type in terms of:

- raw frac sand
- resin-coated sand
- ceramic and other specialty proppants such as ultra-lightweight, walnut shells, and nanocomposites.

For the purposes of this report, Mexico is not included in North America. Proppant sales are valued at the manufacturers' level, meaning that prices reflect the cost of the proppant prior to the addition of transportation costs.

Total demand is also segmented by location as follows:

- Texas
- Oklahoma
- Ohio and Pennsylvania
- Colorado
- other US locations such as North Dakota, Louisiana, and New Mexico
- Alberta
- all other Canada.

To illustrate historical trends, total demand is provided in annual series from 2006 to 2016; the various segments are reported at five-year intervals for 2006, 2011, and 2016.

This report 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.

## About This Report

Key macroeconomic indicators are also provided with quantified trends. 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

*Proppants: North America* (FF65053) is based on *Proppants Market in North America*, 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 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
- 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 | Industry Codes Related to Proppants

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
212324	Kaolin and Ball Clay Mining	1382	Oil and Gas Field Exploration Services
212325	Clay and Ceramic and Refractory Minerals Mining	1455	Kaolin and Ball Clay
213112	Support Activities for Oil and Gas Operations	1459	Clay, Ceramic, and Refractory Minerals, NEC
327992	Ground or Treated Mineral and Earth Mfg	3295	Minerals and Earths, Ground or Otherwise Treated

Source: US Census Bureau

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## Resources

### The Freedonia Group

*Proppants Market in North America*, July 2017

### Freedonia Industry Studies

*Drilling Fluids & Chemicals Market in the US*, May 2017

*Oklahoma Oil & Gas Drilling Outlook*, May 2017

*Texas Oil & Gas Drilling Outlook*, April 2017

*Global Emulsion Polymers Market*, November 2016

*Specialty Surfactants*, August 2016

*World Refining Catalysts*, August 2016

*Natural Polymers*, May 2016

*Corrosion Inhibitors*, April 2016

*Midstream Oil & Gas Equipment*, February 2016

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*Natural Polymers: United States*

*Refined Petroleum Products: United States*

*World Emulsion Polymers*

*World Refining Catalysts*

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### Agencies & Associations

Alberta Energy Regulator

American Petroleum Institute

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Interstate Oil and Gas Compact Commission  
Occupational Safety and Health Administration  
Oklahoma Corporation Commission  
Railroad Commission of Texas  
United States Energy Information Administration  
United States Environmental Protection Agency  
United States Geological Survey  
United States International Trade Commission