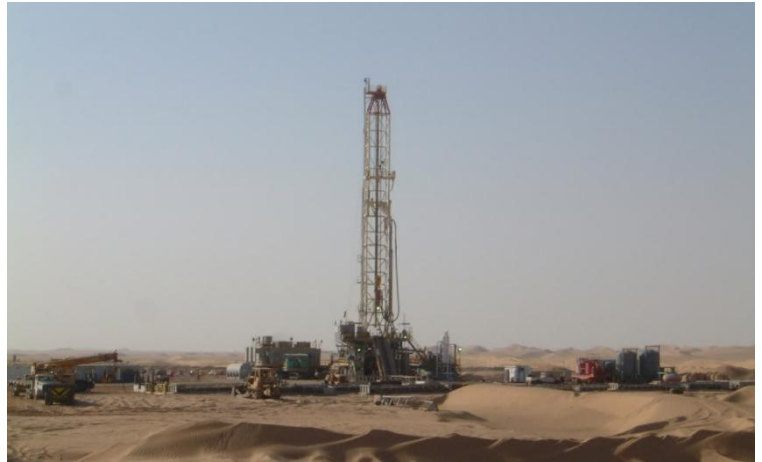


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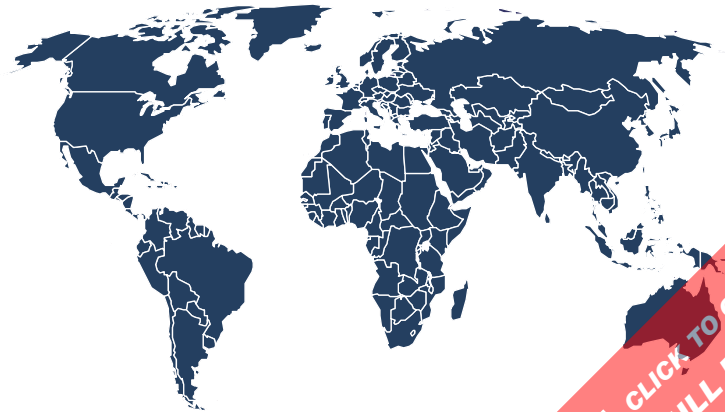


# World

# Well Stimulation

# Materials

December 2013



## Highlights

### World Overview and Forecasts

Demand by Product | World Oil and Gas Production Trends

### Regional Trends and Forecasts

Regional Demand Overview | United States | Canada | China | Russia | Other Regions

### Industry Structure

Industry Composition | Industry Leaders | Additional Companies Cited

### Resources

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## ABOUT THIS REPORT

### Scope & Method

This report forecasts total world demand in 2017 for well stimulation materials by product and major world region in metric tons. Product segments include:

- raw sand proppants
- coated sand proppants
- ceramic and other proppants
- gases
- other fluid materials
- fluid additives.

Excluded from the scope of this report are well stimulation services and equipment.

Major world regions include:

- United States
- Canada
- China
- Russia
- all other regions.

Demand by product segment is also forecast for each major world region.

To illustrate historical trends world, product, and regional demand are provided for 2007 and 2012.

Finally, world oil and gas production is segmented by major world region and provided for 2007, 2012, and 2017 in British thermal units (Btu).

Forecasts emanate from 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 2017.” 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.

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

*World Well Stimulation Materials* is based on [a comprehensive industry study](#) published

by The Freedonia Group in December 2013. 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 June 2013
- 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 |  |
| 212322  | Industrial Sand Mining                                       | 1381                    | Drilling Oil and Gas Wells               |
| 213111  | Drilling Oil and Gas Wells                                   | 1446                    | Industrial Sand                          |
| 325120  | Industrial Gas Mfg   | 2813                    | Industrial Gases                         |
| 325188  | All Other Basic Inorganic Chemical Mfg                       | 2819                    | Industrial Organic Chemicals, NEC        |
| 325998  | All Other Miscellaneous Chemical Product and Preparation Mfg | 2899                    | Chemicals and Chemical Preparations, NEC |

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