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# Oilfield Chemicals

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US Industry Study with Forecasts for **2011 & 2016**

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Study #2253 | October 2007 | \$4500 | 295 pages

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**The Freedonia Group**

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: [info@freedoniagroup.com](mailto:info@freedoniagroup.com)

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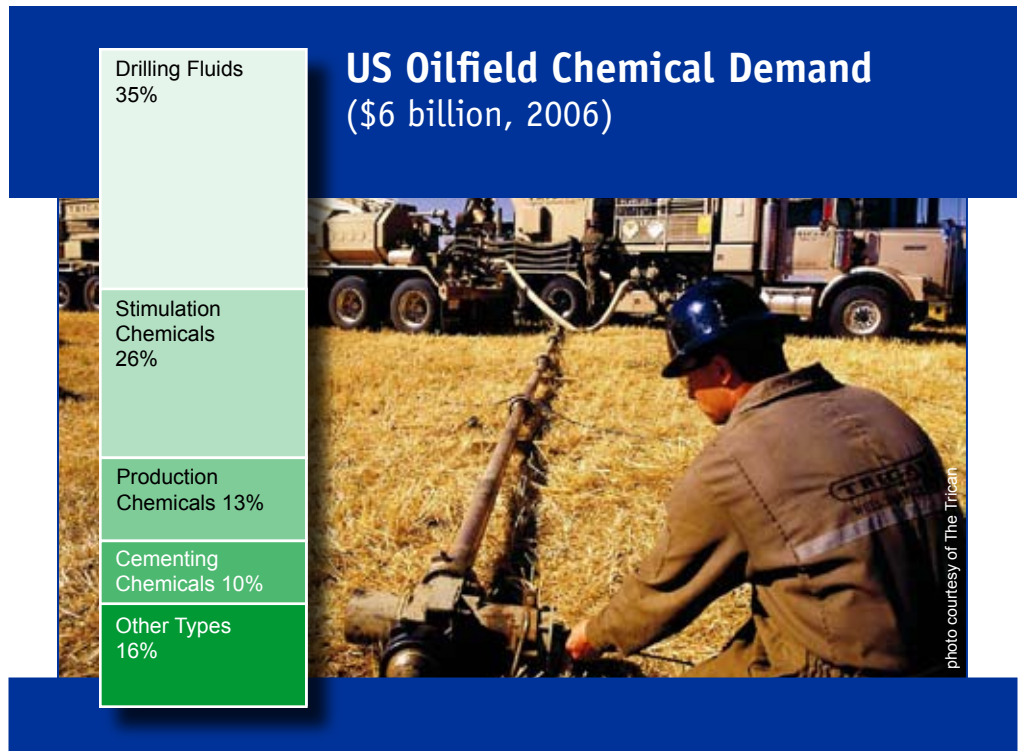
*Cyclically high energy prices coupled with rising demand for crude oil and natural gas from industrializing nations will drive demand for chemicals that maximize oilfield production.*

## US demand to grow 4.3% annually through 2011

Demand for formulated oilfield chemical products in the US is forecast to increase 4.3 percent per year through 2011 to \$7.4 billion, requiring \$4.0 billion of raw materials. In 2006, US energy prices reached their highest levels in two decades, driven by global and regional tightness in crude oil and natural gas supplies. Rising demand from industrializing nations has been driving robust global crude oil consumption at a time when many key producing areas are struggling to expand oil output. This tenuous market situation has eroded spare production capacity and sharply increased crude prices. Similar supply concerns are found in the US natural gas market, as stagnant production and import infrastructure limitations have restrained supplies. As a result of these supply challenges, continuing market tightness is expected to leave oil and natural gas prices elevated through the upcoming decade.

## Strong expansion in oilfield activity to boost gains

Overcoming significant oil and natural gas production difficulties will require continued high levels of oilfield activity. The subsequent rise in rig counts, the increased utilization of well stimulation and enhanced oil recovery methods and the continued push into deepwater drilling and production will provide a wide range of opportunities for the suppliers of



both formulated oilfield chemicals and their raw materials. By 2011, \$1.4 billion in new annual chemical demand will be created by a strong expansion in oilfield activity, despite an expected moderation in pricing trends as cost increases for key raw materials such as cement and barite ease.

## Drilling fluids, stimulation, EOR chemicals among fastest growing types

Much of the gains in oilfield chemical demand will be from the drilling fluids and stimulation chemicals needed to support high levels of rig activity and widespread well stimulation efforts; such increases will also drive gains for the raw

materials such as barite, surfactants and polymers needed to formulate these products. Faster growth is expected for chemicals used in enhanced oil recovery (EOR) operations, with value gains benefitting from efforts to fully exploit mature domestic fields and a growing reliance on merchant carbon dioxide. Rising well completions and the increasing utilization of horizontal and multilateral drilling are driving gains for cementing chemicals and completion and workover fluids. Growth in production chemical consumption is expected to outpace gains in oil and gas output as rising water cuts and the production of sulfur-heavy oil and gas require greater use of treatment chemicals.

## Sample Text, Table & Chart

### OILFIELD CHEMICAL RAW MATERIALS

#### Cellulose Polymers

Demand for cellulose polymers in oilfield applications is expected to expand to 200 million volume demand in primary drilling fluids. These gains are expected to be realized through the period. A shift toward water-based drilling fluids will also benefit cellulose polymers, which are used to those products as well. Environmental concerns have resulted in more stringent regulations for drilling fluids, a development that benefits cellulose polymers, which offer environmental advantages over some other products. The ongoing shift toward water-based drilling fluids will aid cellulose polymer demand, as these products are water-soluble and perform well in water-based fluids.

**SAMPLE TEXT**

The most widely used cellulose polymers are carboxymethyl cellulose (CMC), hydroxyethyl cellulose (HEC) and polyanionic cellulose (PAC), although other products are also used in lesser quantities, including hydroxypropyl cellulose and carboxymethyl hydroxyethyl cellulose. These products are based on water-soluble cellulose ethers, which are produced through the chemical modification of cellulose, a naturally occurring polymer derived from the photosynthesis of wood pulp, cotton or other plants. The chemical modification renders the cellulose ether nonionic or anionic. A relatively new class of cellulose ethers -- cationic -- has been developed, but applications in the oilfield industry are few.

CMC and PAC polymers are used in drilling, workover and completion fluids, although drilling accounts for the majority of use. In drilling applications, CMC polymers function as thickening and suspending agents. CMCs used in drilling muds are available in low viscosity and high viscosity grades, with each having API specifications. Viscosity of the polymer is determined by the molecular weight. Despite its additive

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TABLE V-2

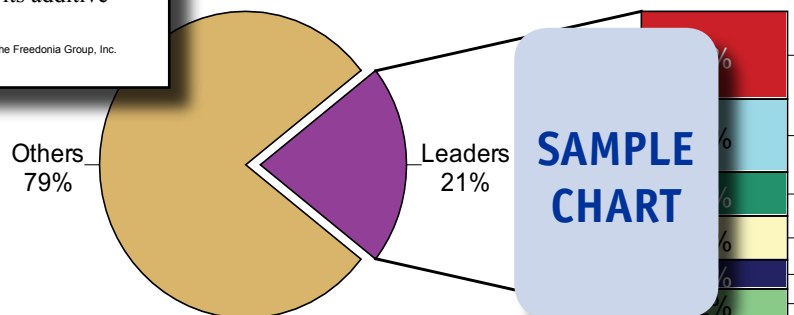
### COMMODITY CHEMICAL DEMAND IN OILFIELD APPLICATIONS (million dollars)

Item	1996	2001	2006	2011	2016
Active Rotary Drilling Rigs mil lb chem/rig	780	1155	1650	1900	2100
Commodity Oilfield Chem (mil lb) cents/lb	11.2	12.2	13.2	14.2	15.2
Commodity Oilfield Chemical Demand	8.7	14.1	21.8	27.1	31.9
Cement	0.1	0.1	0.1	0.1	0.1
Barite	0.1	0.1	0.1	0.1	0.1
Bromine Compounds	0.1	0.1	0.1	0.1	0.1
Clays	0.1	0.1	0.1	0.1	0.1
Acids	0.1	0.1	0.1	0.1	0.1
Calcium Chloride	0.1	0.1	0.1	0.1	0.1
Other	0.1	0.1	0.1	0.1	0.1
% commodities	100	100	100	100	100
Oilfield Chemical Raw Materials	100	100	100	100	100

**SAMPLE TABLE**

CHART VI-1

### US FORMULATED OILFIELD CHEMICAL PRODUCT MARKET SHARE, 2006 (\$6.0 billion)



**SAMPLE CHART**

## Sample Profile, Table & Forecast

### COMPANY PROFILES

#### Messina Incorporated

5307 East Mockingbird Lane, Suite 913  
 Dallas, TX 75206  
 214-887-9600  
<http://www.messina-oilchem.com>

Annual Sales:  
 Employment:

Key Products

Messina  
 chemicals and related  
 engineering services

The Company's range of oilfield chemicals encompasses a broad line of fluids, additives and cements used for drilling, workover, completion, cementing, stimulation and production applications in oil and gas fields. For example, Messina designs, formulates and produces a range of drilling, workover and completion fluids and systems. Representative offerings include nontoxic drilling mud systems designed for use in environmentally sensitive areas. Among other functions, these drilling mud systems are used to provide wellbore and tool lubricity, remove drill cuttings, and prevent the entry and migration of formation fluids by maintaining proper hydrostatic pressures. Other drilling fluid systems produced by the Company include oil-based mud systems, such as OILMUL and KLEEN-MUL invert emulsion fluid systems, which feature oil as the continuous phase with water or brine as the emulsified internal phase; and TRU-OIL continuous oil-base mud systems, which reportedly provide the highest levels of borehole stability and good thermal tolerance.

**SAMPLE  
PROFILE**

TABLE IV-9

### OILFIELD STIMULATION CHEMICAL DEMAND (million dollars)

Item	1996	2001	2006	2011	2016
Producing Wells (000)	8	8	8	8	8
000 gal fluid/well	1	1	1	1	1
Stimulation Fluid Volume (mil gal)	1	1	1	1	1
Explosives Volume (mil lbs)	0	0	0	0	0
\$/gallon - all fluids	0	0	0	0	0
Stimulation Chemical Demand	2820	3850	5980	7575	9100
Stimulation Fluids:					
Hydraulic Fracturing Fluids					
Acid Frac/Acidizing Fluids					
Explosives					
% stimulation chemicals	2	2	2	2	2
Oilfield Chemical Demand	2820	3850	5980	7575	9100

**SAMPLE  
TABLE**

**"Production Chemicals** - Demand for chemicals used in oil and gas production activities is forecast to advance 3.8 percent annually through 2011 to \$950 million. In volumetric terms, by 2011 production chemical demand will be in excess of 925 million pounds. Relative to other formulated oilfield chemicals, production chemical demand tends to be significantly less volatile, being more dependent on oil and gas production levels instead of more cyclical determinants such as the level of drilling activity. That said, demand is still relatively dependent on ..."  
 --Section IV, pg. 118

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**OTHER STUDIES**

**Mining Chemicals**

US mining chemicals demand will reach \$2.5 billion in 2011 based on gains in key markets such as coal mining and aggregate quarrying, which will boost demand for blasting agents. Explosives are the most important chemicals used in the mining industry and will provide the best opportunities. This study analyzes the 21 billion pound US mining chemical industry, with forecasts for 2011 and 2016 by product, function, application and market. It also evaluates company market share and profiles major producers.

#2267 ..... 11/2007..... \$4500

**World Lubricants**

Global demand for lubricants will reach 41.8 million metric tons in 2010. Gains will be driven by increasing motor vehicle ownership and use and growth in manufacturing activity. Engine oils will continue to claim over half of demand, while process oils will grow the fastest. Manufacturing markets will lead gains. This study analyzes the \$35.7 billion world lubricant industry to 2010 and 2015 by formulation, product, world region and for 31 countries. It also evaluates market share and profiles major players.

#2182 ..... 04/2007..... \$5400

**World Oilfield Chemicals**

Global demand for oilfield chemicals will rise 5.9% annually through 2010, driven by sustained growth in drilling activity. The dominant North American market will register healthy gains as producers strive to maintain production. Drilling fluids will remain the largest type while well stimulation chemicals will lead gains. This study analyzes the \$10.9 billion world oilfield chemical industry to 2010 and 2015 by type, world region and for 25 countries. It also details company market share and profiles major players.

#2162 ..... 03/2007..... \$5400

**World Well Stimulation Materials**

Global demand for well stimulation materials is forecast to increase 11.3% annually through 2010. Gains will be driven by high oil and gas prices coupled with maturing wells. Among the leading markets, China, Canada and Russia hold stronger prospects than the US. Proppants will be the largest and fastest growing product. This study analyzes the \$2.5 billion world well stimulation material industry to 2010 and 2015 by product, key country and world region. It also evaluates market share and profiles major players.

#2161 ..... 03/2007..... \$5400

**Well Stimulation Materials**

US well stimulation material demand will grow 11% annually through 2010. Gains will be driven by efforts to maximize output of existing oil and gas wells and by increases in well drilling and completion. Proppants will remain the largest type and grow the fastest, followed by foaming and gelling agents and base fluid additives. This study analyzes the \$1.1 billion US well stimulation material industry to 2010 and 2015 by product and regional market. The study also details market share and profiles major players.

#2101 ..... 09/2006..... \$4200

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