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World Oilfield Chemicals

Industry Study with Forecasts for **2016 & 2021**

Study #2973 | December 2012 | \$6200 | 417 pages

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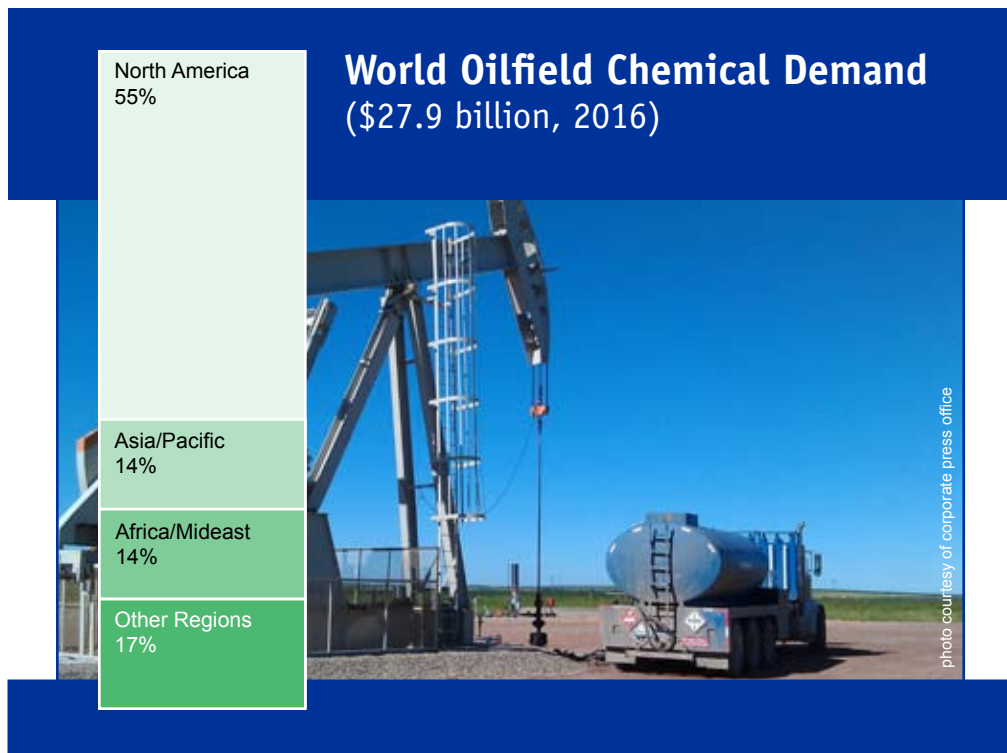
The best opportunities will be in drilling fluids and stimulation chemicals as horizontal drilling and hydraulic fracturing are used to develop shale plays in the US and Canada.

World demand to increase 8.9% yearly through 2016

World demand for oilfield chemicals is expected to increase 8.9 percent per year to \$27.9 billion in 2016 as high oil prices and increasing demand for energy spur new development, especially in unconventional and offshore fields. Nearly all types of chemicals will post healthy advances, but the best opportunities will be in drilling fluids and stimulation chemicals. Horizontal drilling and hydraulic fracturing used to develop shale plays in the US and Canada have been a driving force in sales of fracturing fluids and high-tech drilling fluids, although whether North America's success in shale development can be duplicated elsewhere is yet to be seen. However, while shale drilling is now purely a regional phenomenon, the development of offshore fields is taking off in other areas. This will drive demand for all types of chemicals, as costs for offshore wells are much higher than for onshore wells. These and other factors will drive demand in the world's growth markets, especially Brazil, Africa, Russia, and in China, India, and several other Asian countries. Also, while slowing, growth will still be strong in the North American market.

North America to remain dominant market

North America is expected to remain the largest market for oilfield chemicals by a wide margin. The US and Canada, with



older and more developed oilfields, offer a much larger market for chemicals designed to maintain output levels in areas of diminishing well flows. Growth in Brazil will be the fastest in the world, due to substantial oil production gains and increased activity in deeper offshore fields, such as the pre-salt formations in the Atlantic. China will remain the largest market in Asia, due to its large number of wells and its need to increase its domestic energy supply. Hydraulic fracturing is used extensively in China, and will continue to grow -- especially as shale resources in Sichuan Province and the northwest of the country are developed.

The Africa/Mideast region, which accounts for more than 45 percent of

global oil production, is a smaller market for oilfield chemicals than its energy output might suggest. Even so, oilfield chemical demand in the region will grow based on increased natural gas production in previously underdeveloped areas and sustained growth in large producers such as Saudi Arabia and Nigeria.

Europe, the slowest growing region for oilfield chemicals, will register strong advances in Russia and a few smaller producing nations, and slower gains in Norway and the UK due to diminishing North Sea output. However, growing interest in shale development and other unconventional settings could serve to stimulate European oilfield chemical demand going forward.

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**Sample Text,
 Table & Chart**

CENTRAL & SOUTH AMERICA

Brazil: Oilfield Chemical Demand

Demand for oilfield chemicals in Brazil is forecast to grow at a rate of 10 percent per year to over \$1 billion by 2021, considerably above the global and regional average. This growth is driven by the ongoing expansion of exploration and production activity, particularly in the deepwater sectors, and the increasing use of oilfield chemicals. Brazil will further increase its oil production to 4 million barrels per day in 2021, up from 3.5 million in 2011. Natural gas production will also increase, with opportunities for increased chemical use, although it is much less significant than oil production. Foreign investment is increasing, which will increase the overall level of technical sophistication in Brazil's oilfield industry, boosting demand for higher value chemical products and creating further opportunities for increased production. Unlike some countries, where foreign competitor participation is limited to joint ventures and production sharing arrangements with the national oil company, both foreign and domestic companies can compete in the Brazilian market, along with Petrobras.

Strong growth opportunities are available for all types of oilfield chemicals in Brazil, a result of the country's diverse and expanding oilfield operations. The heavy crude generally produced from Brazilian fields will support demand for production chemicals, while demand for drilling fluids, completion fluids and cement will benefit from growing activity in deepwater areas. Overall increases in drilling activity will also boost demand, following a downturn in 2010 and 2011. Much of the activity in the short term will be related to ongoing production in the offshore Santos basin and the process of bringing pre-salt production online, as well as further developing the comparatively small onshore sector, which is largely based in the northern part of the country. The pre-salt areas hold the greatest potential for oil production, with estimates reaching as high as 100 billion barrels. The greatest natural gas production lies in the shale formations in the southern

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**SAMPLE
 TEXT**

TABLE VI-6

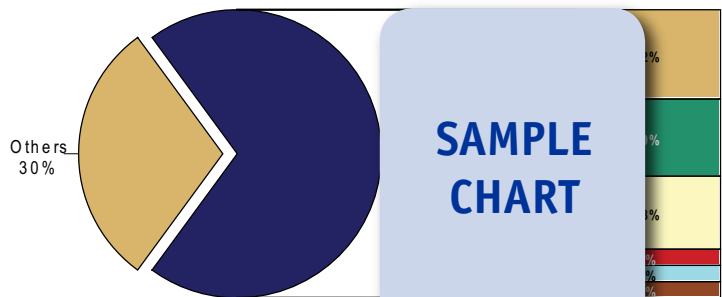
**BRAZIL: OILFIELD CHEMICAL DEMAND BY TYPE
 (million dollars)**

Item	2001	2006	2011	2016	2021
Oil & Gas Production (quadrillion Btu) \$ chem/bil Btu					
Oilfield Chemical Demand					
Drilling Fluids					
Stimulation & EOR Chemicals					
Production Chemicals					
Completion & Workover Fluids					
Cement & Additives					
% Brazil					
C & S America Oilfield Chem Demand					

**SAMPLE
 TABLE**

CHART X-1

**WORLD OILFIELD CHEMICAL MARKET SHARE
 (\$18.2 billion, 2011)**



**SAMPLE
 CHART**

Sample Profile, Table & Forecast

COMPANY PROFILES

Gumpro Drilling Fluids Pvt Limited

LBS Road, Opp. Karma-Stambh
 Vikhroli, Mumbai 400083
 India
 91-22-2579-3
<http://www.gu>

Annual Sales:
 Employment:

Key Products

Gumpro Drilling Fluids is a privately held manufacturer of oilfield chemicals and provider of drilling mud services. The Company, which maintains four production facilities in Maharashtra and Gujarat, India, markets its products worldwide. A research and development facility is located in Mumbai, India.

The Company's portfolio of oilfield chemicals consist of various drilling fluid additives, most of which are sold through the GEL product line. Specific products include viscosifiers, lost circulation materials, weighting agents, fluid loss control additives, and emulsifiers. GEL viscosifiers include carboxymethyl cellulose (CMC), polyanionic cellulose (PAC), bentonite, and natural polymer types. Lost circulation materials made by Gumpro Drilling Fluids are GEL LC SEAL fiber, GEL CHIP marble chip, GEL MIC muscovite mica, GEL NUT PLUG walnut shell, GEL K SEAL fiber/granule/flake blend, and GEL FLAKE polymeric plug types. Gumpro Drilling Fluids manufactures weighting agents in barite and ground limestone formulations. Fluid loss control additives are made by the Company in lignite, starch, CMC, and PAC types, while Gumpro Drilling Fluids' emulsifiers include GEL MUL primary and GEL WET secondary varieties. Among the other drilling,

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TABLE VI-5

BRAZIL: KEY INDICATORS FOR OILFIELD CHEMICAL DEMAND

Item	2001	2006	2011	2016	2021
Population (million persons)	170	180	190	200	210
GDP/capita	1,000	1,500	2,000	2,500	3,000
Gross Domestic Product (bil 2010\$)	1,000	1,500	2,000	2,500	3,000
000 Btu/\$ GDP	1,000	1,500	2,000	2,500	3,000
Oil & Gas Production (quadrillion Btu)	1,000	1,500	2,000	2,500	3,000
Crude Oil Production (mil bbl)	1,000	1,500	2,000	2,500	3,000
Dry Natural Gas Production (tril cu ft)	1,000	1,500	2,000	2,500	3,000
Active Drilling Rigs	1,000	1,500	2,000	2,500	3,000
Wells Drilled	1,000	1,500	2,000	2,500	3,000

**SAMPLE
TABLE**

"Brazil has become a globally significant oil producer. In 2011, Brazilian field production was the second largest in the region. Moreover, Brazilian crude production has increased dramatically, averaging five percent annually over the last 10 years, compared with a global average of less than one percent. Production is expected to increase 8.3 percent annually to more than 1.1 billion barrels in 2016, by which time it will be the regional leader. In addition, ..."
 --Section VI, pg. 147

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OTHER STUDIES

Corrosion Inhibitors

US demand for corrosion inhibitors will rise 4.1 percent annually to \$2.5 billion in 2017. The oil and gas industry's continued expansion of horizontal drilling and hydrofracturing well stimulation in shale formations will drive advances in demand. Concrete and cement additives will grow the fastest due to a rebound in construction spending. This study analyzes the \$2 billion US corrosion inhibitors industry, with forecasts for 2017 and 2022 by application, market and product. The study also evaluates company market share and profiles industry competitors.

#2994 March 2013..... \$5100

World Catalysts

World demand for catalysts will rise 5.8 percent per year to \$19.5 billion in 2016. Rapid growth will occur in both Asia and the Middle East. Brazil will lead strong growth in Central and South America. Polymerization catalysts will experience the fastest growth, driven by healthy expansion of polymer resin production. This study analyzes the \$14.7 billion world catalyst industry, with forecasts for 2016 and 2021 by material, type, market, world region and for 24 countries. The study also evaluates company market share and profiles industry players.

#2989 February 2013..... \$6400

World Industrial Silica Sand

Global demand for industrial silica sand will grow 4.8 percent annually to 280 million metric tons in 2016, valued at \$9.2 billion. Glass and foundries will remain the largest markets, while faster gains will be seen in the developing hydraulic fracturing sector. The Americas will be the fastest growing regional markets. This study analyzes the 222 million metric ton world silica sand industry, with forecasts for 2016 and 2021 by market, world region, and for 18 major countries. The study also evaluates company market share, and profiles industry participants

#2940 October 2012 \$5900

Well Stimulation Materials

US demand for well stimulation materials is forecast to rise 10.2 percent annually to nearly \$12 billion in 2016. Growth will be driven by continued advances in hydraulic fracturing technology designed to increase the productivity of both new and existing wells. Propants, gases, and base fluid materials will be among the fastest growing products. This study analyzes the \$7.4 billion US well stimulation material industry, with forecasts for 2016 and 2021 by product and regional market. The study also evaluates company market shares and profiles industry players.

#2867 March 2012..... \$5100

Oilfield Chemicals

US oilfield chemical demand will rise 8.3 percent yearly through 2015, driven by the recovery of oil prices and the development of shale gas resources. Stimulation and cementing chemicals will be the fastest growing products, followed by drilling fluids. Natural gums, polymers, acids and surfactants will be among the best prospects in raw materials. This study analyzes the \$9.1 billion US oilfield chemical industry, with forecasts for 2015 and 2020 by product and raw material. The study also evaluates company market share and profiles industry players.

#2821 November 2011 \$4900

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