Oilfield Chemicals

US Industry Study with Forecasts for 2019 & 2014

Study #3352 | November 2015 | $5300 | 321 pages
# Oilfield Chemicals
US Industry Study with Forecasts for 2019 & 2024

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US demand to reach $10.3 billion in 2019

US demand for oilfield chemicals is forecast to increase to $10.3 billion in 2019, with healthy growth overcoming declines expected in 2015 and 2016. Although low oil prices in 2015 have led to sharp reductions in exploration and development spending, a recovery in prices should bring about a rebound by 2019, allowing the market for chemicals used in drilling, completion, cementing, hydraulic fracturing, and enhanced oil recovery (EOR) to all see increases in demand by the end of the period.

Unconventional drilling benefits oilfield chemicals

The boom in US unconventional drilling has been the most important development in the world’s oil and gas industry since the 1970s, altering the balance of supply and demand at a global level and ultimately contributing to the collapse of oil prices in 2014. At the same time, unconventional oil and gas have dramatically changed the market for oilfield chemicals as higher costs and a greater level of complexity associated with each well have led to rapid demand growth. The use of large volume hydraulic fracturing has markedly increased the volume of chemicals used in an average well completion, while the drilling of ever longer horizontal wells has promoted additional consumption of drilling and completion fluids, cement, and related chemicals.

Slickwater fracturing fluids among best opportunities

The technologies employed in developing tight oil and shale gas resources continue to evolve, and key trends over the next several years will include the ongoing shift toward slickwater fracturing fluids and high-performance drilling muds. Environmental concerns and the development of chemical formulations that can address these concerns will also have an increasing impact on the market during the forecast period, promoting additional demand for more environmentally friendly chemicals, such as biodegradable shale inhibitors and less toxic biocides. Offshore activity is expected to remain an important contributor to the overall market as well, and the need for environmentally compatible fluids and chemicals will be greatest in offshore environments.

Hydraulic fracturing to remain key application

Hydraulic fracturing has emerged as the largest application for oilfield chemicals. Despite the low oil price environment, continued growth in the average volume of fluids used per well will sustain growth in chemical demand. However, this positive factor will be partially offset by the rising use of slickwater fluids with reduced chemical loadings. Guar gum will remain the most significant chemical in hydraulic fracturing.
OILFIELD FLUIDS OUTLOOK

Water-Based Drilling Fluids

Demand for water-based drilling fluids is expected to increase at a CAGR of around 7.1% over the next five years, reaching a market value of $3.7 billion. Demand growth will be driven by an increase in the number of wells drilled, as well as by increases in the drilling footage and in the number of wells drilled in unconventional drilling areas. Water-based fluids are favored for their environmental benefits, lower cost, and ease of disposal, and are usually prepared by adding water to a base mud, which may be modified with bentonite (gel) or polymers to enhance the ability of water-based fluids to carry drill cuttings to the surface. Fresh or salt water can be used, and many other additives are employed to tailor the fluid’s properties to the formation being drilled. The use of deflocculants to prevent aggregation of clay particles and other suspended solids produces what is referred to as a dispersed mud, while the absence of such additives creates a non-dispersed mud.

Water-based muds are both more environmentally friendly and less expensive per gallon than OBMs and SBMs and are also easier to dispose of. However, in some aspects -- such as lubricity and the tendency to cause shale to swell and become unstable -- conventional WBM performance is markedly inferior to that of non-aqueous drilling fluids. As a result, WBMs have traditionally held a dominant share of the market for shallower and less challenging drilling conditions but have been used less frequently in drilling deeper wells, horizontal intervals in unconventional wells, and in other circumstances where shale inhibition and lubricity are important concerns. Over the last several years, improvements in WBM engineering have reduced the performance gap between WBM and OBM formulations to a significant extent, allowing WBMs to gain market share in unconventional drilling applications. High-performance water-based muds (HPWBMs) can offer performance approaching that of OBMs and, while their cost is significantly higher than conventional water-based muds, they can offer performance that is vigorously competitive with that of OBMs.

<table>
<thead>
<tr>
<th>Item</th>
<th>2004</th>
<th>2009</th>
<th>2014</th>
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<td>Formulated Oilfield Chemical Demand</td>
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Source: The Freedonia Group, Inc.

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## COMPANY PROFILES

**GEO Drilling Fluids Incorporated**

1431 Union Avenue  
Bakersfield, CA 93305  
661-325-5919  
www.geodf.com

**Key Products:** drilling fluids, oilfield fluid additives, and related raw materials used in the formulation of drilling fluids.

GEO Drilling Fluids is a privately held manufacturer and supplier of oil- and water-based fluids and additives for the oil, gas, and geothermal industries. The Company maintains chemical mixing and warehouse facilities in Bakersfield, Woodland, and Sacramento, California; and Belfield, North Dakota. In addition, GEO Drilling Fluids’ Industrial Minerals Company subsidiary (Sacramento, California) specializes in the production of clays and minerals for the ceramic industry.

Among the Company’s products are oilfield chemicals, including drilling fluids, oilfield fluid additives, and related raw materials. Drilling fluids manufactured by GEO Drilling Fluids include PETRODRILL oil-based drilling fluids, many of which are formulated using the Company’s LVT 200 low-viscosity base oil; and POLYTEK+ one-sack drilling fluids. These fluids are formulated for use in a wide range of oilfield drilling applications.

Specialty oilfield fluid additives made by the Company are formulated to modify the physical properties of drilling fluids. The products include MUL TREAT dispersants and wetting agents, MUL I emulsifiers.

## TABLE VI-10

**CLAY DEMAND IN OILFIELD APPLICATIONS**

(million dollars)

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<th>2004</th>
<th>2009</th>
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<td>Wells Drilled (000)</td>
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<td>000 lb clay/well</td>
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<td>Clay Demand (mil lb)</td>
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<td>Other Clays</td>
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<td>% clay</td>
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<td>Commodity Chemical Demand</td>
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Source: The Freedonia Group, Inc.

### SAMPLE PROFILE & Table, & Study Coverage

This Freedonia study, *Oilfield Chemicals*, offers historical data (2004, 2009, 2014) plus demand forecasts (2019, 2024) by technology, type, application and market. The study also considers key market environment factors, assesses the industry structure, details company market share and profiles 42 competitors in the US industry.
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Proppants in North America
Demand for proppants in North America is forecast to increase 7.6 percent annually through 2019 to 162 billion pounds, valued at $8.2 billion. Growth will slow from previously rapid gains as oil and gas prices remain subdued, with future demand driven by increases in proppant loadings in unconventional well completions. This study analyzes the 112.2 billion pound proppant industry in the United States and Canada, with forecasts for 2019 and 2024 by type and regional market. The study also evaluates company market share and profiles industry players.

#3302 ............ September 2015 ............ $300

Drilling Products & Services
US demand for oil and gas drilling products and services is forecast to increase to $71 billion in 2019, reflecting average annual gains of 3.0 percent. Services will remain the dominant segment while fluids will grow the fastest. The Eastern and Western US will be the fastest growing regional markets. This study analyzes the $60.8 billion US drilling product and service industry, with forecasts for 2019 and 2024 by product and service for four regional markets and 17 state markets. The study also evaluates company market share and profiles industry players.

#3286 ............ June 2015 ............ $300

World Oilfield Chemicals
World demand for oilfield chemicals is forecast to increase 6.0 percent annually to $33 billion in 2019. North America will remain by far the dominant market, while Asia/Pacific and Africa/Mideast markets grow the fastest from small bases. Drilling fluids will continue to account for the largest share of demand and will grow at a healthy pace. This study analyzes the $25 billion world oilfield chemical industry, with forecasts for 2019 and 2024 by product, world region, and for 25 countries. The study also evaluates company market share and profiles industry players.

#3249 ............ March 2015 ............ $600

World Upstream Oil & Gas Outlook
World upstream oil and gas activity will remain at a high level, with annual wells drilled increasing to over 115,000 in 2018. While recent crude oil price drops may limit drilling in the volatile North American market, world activity should continue to grow as many lower cost or highly productive wells remain profitable. This study analyzes activity in the 103,400-well world upstream oil and gas industry, with forecasts for 2018 and 2023 by indicator, world region, and for 16 countries. The study also considers market environment factors and profiles industry participants.

#3197 ............ December 2014 ............ $6200

Well Stimulation Materials
US demand for well stimulation materials will climb 10.6 percent annually to $15.2 billion in 2018. Efforts to improve well productivity and develop unconventional resources will continue to change the product mix. Proppants are the largest material type but a variety of chemicals and other products will see strong gains. Texas will remain a key market. This study analyzes the $9.2 billion US well stimulation material industry, with forecasts for 2018 and 2023 by product and regional market. The study also evaluates company market shares and profiles industry players.

#3160 ............ June 2014 ............ $5300

About The Freedonia Group
The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States and other world markets. Industries analyzed by Freedonia include:

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