

The Proppants Market 2013-2023

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Abstracts

Report Details

Proppants are an integral part of hydraulic fracturing, the process by which unconventional oil and gas resources are extracted. The promise of unconventional resources to meet the energy demands of the near future, due in part to technological improvements and multi-stage horizontal drilling techniques, will drive ever-increasing amounts of hydraulic fracturing. Proppant sales will grow as a part of this trend, expanding in value and volume terms.

Three main types of proppant for the oil and gas industry exist: ceramic proppant, resin coated proppant and frac sand. By volume, frac sand dominates proppant usage with resin coated and ceramic proppants a smaller percentage of the mix. However, the cost of the latter two products means that they challenge the market share of frac sand by value sold. The range and strength of ceramic proppants on offer means that they possess the greatest market share, by value, of proppants sold.

The outlook for unconventional oil and gas development is the primary determinant of proppant sales. The amount of hydraulic fracturing jobs performed will increase significantly in Russia and China over the next ten years. The former is aiming to exploit tight/shale oil reserves, whilst the latter harbours ambitions for all types of unconventional resources with natural gas the focus of attention. Sales of proppants destined for use in Russia is poised for take-off, whereas the difficulty in developing unconventional in China will stack the greater increase in sales from 2018 to 2023. In addition to these two emerging markets, there are a number of other countries that will demand more proppant over the coming decade, such as Australia.

In the US and Canada, a depressed natural gas price has caused a major shift in proppant destinations away from unconventional gas plays and toward unconventional

oil plays. The advent of LNG exports will play a part in a minor recovery of natural gas prices over the coming decade; this, in turn, will improve proppant sales in North America in the latter part of the forecast period as hydraulic fracturing of drier unconventional plays picks up.

Global oil prices and regional gas markets are thus also a key determinant of proppants sales for they dictate the economic viability of unconventional development. Without this viability, proppants sales will decrease. However, visiongain anticipates a combination of political will, price dynamics and forthcoming geologies to increase hydraulic fracturing of unconventional plays worldwide.

The use of multi-stage horizontal fracturing is also a boon to proppant sales as it dramatically increases the volume of proppants per well. The use of this technique will expand worldwide over the next 10 years, increasing the economics of projects and driving up demand for proppants.

Visiongain has determined that the value of the proppants market in 2013 will reach \$7,467.0m.

What makes this report unique?

Visiongain consulted widely with industry experts and full transcripts from these exclusive interviews are included in the report. As such, the report has a unique blend of primary and secondary sources providing informed opinion. The report provides insight into key drivers and restraints behind the sale of proppants, identifying future growth areas and analyses leading companies. The report also provides a unique blend of qualitative analysis combined with extensive quantitative data including global, submarket and national market forecasts from 2013-2023 %lili%all highlighting key business opportunities.

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Analysis of 12 companies active in the proppants market

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Contents

1. EXECUTIVE SUMMARY

- 1.1 The Global Proppants Market Overview
- 1.2 Benefits of This Report
- 1.3 Who is This Report For?
- 1.4 Methodology
- 1.5 Global Proppants Market Forecast 2013-2023
- 1.6 Proppants Submarket Forecasts 2013-2023
- 1.7 Leading National Proppants Market Forecasts 2013-2023

2. INTRODUCTION TO THE PROPPANTS MARKET

- 2.1 Proppants Market Definition
- 2.2 Proppants Market Structure
- 2.3 Proppants Demand Structure
- 2.4 Types of Proppant
 - 2.4.1 Frac Sand
 - 2.4.2 Resin Coated Proppant
 - 2.4.3 Ceramic Proppant
- 2.5 Proppant Supply Chain
- 2.6 Proppant Use in the Oil and Gas Industry - Hydraulic Fracturing
- 2.7 Recent History of Proppants Industry
- 2.8 Types of Unconventional Development

3. GLOBAL PROPPANTS MARKET FORECAST 2013-2023

- 3.1 Drivers & Restraints on the Global Proppants Market

4. PROPPANTS SUBMARKET FORECASTS 2013-2023

- 4.1 The Ceramic Proppants Market Forecast 2013-2023
 - 4.1.1 Ceramic Proppants Overview
 - 4.1.2 Ceramic Proppant Market Dynamics
 - 4.1.3 Drivers and Restraints on the Ceramic Proppants Market
- 4.2 The Resin Coated Sand Proppants Market Forecast 2013-2023
 - 4.2.1 Drivers and Restraints on the Resin Coated Sand Market
 - 4.2.2 Key Players in Resin Coated Sand Manufacture

4.3 The Frac Sand Market Forecast 2013-2023

4.3.1 Drivers and Restraints on the Frac Sand Market

5. LEADING NATIONAL PROPPANTS MARKETS 2013-2023

5.1 Leading National Proppants Markets Forecasts 2013-2023

5.2 Leading National Proppants Markets Share Forecast 2013-2023

5.3 Barriers to Entry Analysis for National Proppants Markets

5.4 The US Proppants Market Forecast 2013-2023

5.4.1 Demand Side Dynamics of US Proppants Market

5.4.1.1 Proppant Demand Drivers

5.4.1.2 Proppant Demand Restraints

5.4.2 Californian Unconventional Oil and Gas Development and Proppant Demand

5.4.3 Proppant Demand Side Analysis by Unconventional Development Type

5.4.3.1 Shale Oil/Tight Oil

5.4.3.2 Tight Gas

5.4.3.3 Shale Gas (Dry)

5.4.3.4 Coalbed Methane

5.4.4 Supply Side Dynamics of US Proppant Market

5.4.4.1 Supply Driver (Available Proppant and Affect on Price/Sales)

5.4.4.2 Supply Restraints

5.4.5 Overall US Proppant Market Drivers & Restraints

5.5 The Russian Proppants Market Forecast 2013-2023

5.5.1 Russian Proppants Market Overview

5.5.2 Strong Growth Dynamics

5.5.3 Drivers & Restraints on the Russian Proppants Market

5.5.4 Shale Gas and Proppants in Russia

5.6 The Chinese Proppants Market Forecast 2013-2023

5.6.1 Chinese Unconventional Resources

5.6.2 Drivers & Restraints on Hydraulic Fracturing and Proppant Sales in China

5.6.2.1 Drivers 5.6.2.2 Restraints

5.6.3 Summary of Chinese Proppant Market Dynamics

5.7 The Canadian Proppants Market Forecast 2013-2023

5.7.1 Drivers & Restraints on the Canadian Proppant Market

5.8 The Australian Proppants Market Forecast 2013-2023

5.8.1 Proppant Demand Drivers

5.8.1.1 Bauxite Availability

5.8.1.2 Shale Gas Development Drivers and Proppant Sales Impact

5.8.2 Shale Gas Development Restraints and Proppant Sales Impact

- 5.8.3 Tight Gas Development and Proppant Sales Impact
- 5.8.4 Shale/Tight Oil Prospects and Proppant Sales Impact
- 5.8.5 Coalbed Methane Development and Proppant Sales Impact
- 5.8.6 Summary of Australian Proppants Market Drivers & Restraints
- 5.9 Rest of the World (RoW) Proppants Market Forecast 2013-2023
 - 5.9.1 Argentinean Proppant Market Prospects
 - 5.9.2 Indian Proppant Market Prospects
 - 5.9.3 Mexican Proppant Market Prospects
 - 5.9.4 Omani Proppant Market Prospects
 - 5.9.5 Polish Proppant Market Prospects
 - 5.9.6 UK Proppant Market Prospects

6. PEST ANALYSIS OF THE PROPPANTS MARKET 2013-2023

7. EXPERT OPINION

7.1 Baltic Ceramics

- 7.1.1 Baltic Ceramics Overview
- 7.1.2 The Importance of Reducing Transportation Distance
- 7.1.3 Demand Markets for Baltic Ceramics Product
- 7.1.4 Competitors and Imported Proppant
- 7.1.5 Proppant Consumption Habits in Europe
- 7.1.6 Ceramic Proppant Benefits
- 7.1.7 Russian Price Threat
- 7.1.8 Resin Coated Sand Competition
- 7.1.9 Limited Hydraulic Horsepower

7.2 Victory Silica

- 7.2.1 Victory Silica Background
- 7.2.2 Victory Silica Strategy
- 7.2.3 Victory Silica Competitors
- 7.2.4 Short Notice Proppant Demand
- 7.2.5 Proppant per Stage
- 7.2.6 Contractual Allocations of Proppant
- 7.2.7 Shift Toward Liquid-Rich Plays
- 7.2.8 Ceramic Proppant Market Share
- 7.2.9 Logistical Considerations
- 7.2.10 LNG Exports

8. LEADING SUPPLIERS IN THE PROPPANTS MARKET

8.1 Leading Publicly Listed Proppant Suppliers

- 8.1.1 Carbo Ceramics Overview
 - 8.1.1.1 Analysis
 - 8.1.1.2 Comparative Competitor Analysis
 - 8.1.1.3 Regional Focus
 - 8.1.1.4 Future Outlook
- 8.1.2 Saint-Gobain Overview 8.1.2.1 Analysis 8.1.2.2 Competitors 8.1.2.3 Regional Focus 8.1.2.4 Future Outlook
- 8.1.3 US Silica Overview
 - 8.1.3.1 Analysis
 - 8.1.3.2 Competitors
 - 8.1.3.3 Regional Emphasis
 - 8.1.3.4 Future Outlook
- 8.1.4 Hi Crush Partners Overview
 - 8.1.4.1 Analysis
 - 8.1.4.2 Competitors
 - 8.1.4.3 Regional Focus
 - 8.1.4.4 Future Outlook
- 8.2 Other Leading Proppant Suppliers
 - 8.2.1 BorProp (JSC "Borovichi Refractories Plant") Overview
 - 8.2.1.1 Analysis
 - 8.2.2 Fores LLC Overview 8.2.2.1 Analysis
 - 8.2.3 Imerys Overview
 - 8.2.4 FTS International Overview
 - 8.2.5 Minera??o Curimbaba Overview
 - 8.2.5.1 Analysis
 - 8.2.5.2 Regional Focus
 - 8.2.6 Momenite Overview
 - 8.2.7 Santrol Overview
 - 8.2.8 Unimin Corporation
- 8.3 Other Proppant Suppliers in the Market

9. CONCLUSIONS

- 9.1 Global Proppants Market Outlook
- 9.2 Proppants Market Drivers & Restraints
- 9.3 Proppants Submarket Forecasts 2013-2023
- 9.4 Leading National Proppants Market Forecasts 2013-2023

10. GLOSSARY

List Of Tables

LIST OF TABLES

Table 1.1 Proppants Submarket Forecast Summary 2013, 2018, 2023 (\$m, CAGR %)

Table 1.2 Leading National Proppants Market Forecast Summary 2013, 2018, 2023 (\$m, CAGR %)

Table 3.1 Global Market Forecast 2013-2023 (\$m, AGR %, CAGR%, Cumulative)

Table 3.2 Global Proppants Market Drivers and Restraints

Table 4.1 Proppant Submarket Forecasts 2013-2023 (\$m, AGR %)

Table 4.2 Ceramic Proppants Market Forecast 2013-2023 (\$m, AGR %, CAGR %, Cumulative)

Table 4.3 Resin Coated Sand Market Forecast 2013-2023 (\$m, AGR %, CAGR %, Cumulative)

Table 4.4 Frac Sand Market Forecast 2013-2023 (\$m, AGR %, CAGR %, Cumulative)

Table 5.1 Leading National Proppants Markets Forecast 2013-2023 (\$m, AGR %)

Table 5.2 US Proppants Market Forecast 2013-2023 (\$m, AGR %, CAGR %, Cumulative)

Table 5.3 US Proppants Market Drivers & Restraints

Table 5.4 Russian Proppants Market Forecast 2013-2023 (\$m, AGR %, CAGR %, Cumulative)

Table 5.5 Russian Proppants Market Drivers & Restraints

Table 5.6 Chinese Proppants Market Forecast 2013-2023 (\$m, AGR %, CAGR %, Cumulative)

Table 5.7 Chinese Proppants Market Drivers & Restraints

Table 5.8 Canadian Proppants Forecast 2013-2023 (\$m, AGR %, CAGR %, Cumulative)

Table 5.9 Canadian Proppants Market Drivers & Restraints

Table 5.10 Canadian LNG Export Terminals (Name, Owner(s), Export Capacity, Cost, Status)

Table 5.11 Australian Proppants Market Forecast 2013-2023 (\$m, AGR %, CAGR %, Cumulative)

Table 5.12 Non-CBM Fed Australian LNG Export Terminals Under Construction (Location, Operator/Owner, Capacity, Construction Cost, Construction Period)

Table 5.13 CBM Fed LNG Export Projects (Location, Owner/Operator, Capacity, Construction Cost, Status)

Table 5.14 Australian Proppants Market Drivers & Restraints

Table 5.15 RoW Proppants Market Forecast 2013-2023 (\$m, AGR %, CAGR %, Cumulative)

Table 6.1 PEST Analysis of the Proppants Market 2013-2023

Table 8.1 Leading Publicly Listed Proppants Suppliers 2013 (Total Revenue, % Revenue in Sector)

Table 8.2 Carbo Ceramics Overview 2012 (Total Company Revenue, Revenue from Market %, HQ, Ticker, IR Contact, Website)

Table 8.3 Carbo Ceramics Proppants (Product, Further Details)

Table 8.4 Saint-Gobain Overview 2012 (Total Company Revenue, Revenue from Market % Revenue from Market, HQ, Ticker, Proppants Division Contact, Website)

Table 8.5 Saint-Gobain Proppants (Product, Further Details)

Table 8.6 US Silica Overview 2012 (Total Revenue, Revenue from Market, % Revenue From Market, HQ, Ticker, IR Contact, Website)

Table 8.7 US Silica Proppants (Product, Further Details)

Table 8.8 Hi Crush Partners Overview 2012 (Total Revenue, Revenue from Market, % Revenue From Market, HQ, Ticker, IR Contact, Website)

Table 8.9 BorProp Proppants (Product, Details)

Table 8.10 Fores LLC Proppants (Product, Details)

Table 8.11 Minera??o Curimbaba Proppants (Product, Details)

Table 8.12 Momenive Proppants (Product, Specification)

Table 8.13 Other Proppants Suppliers in the Market 2013 (Company, Primary Location, Proppant(s) Offered/Information)

Table 9.1 Global Proppants Market Drivers & Restraints

Table 9.2 Proppants Submarket Forecasts Summary 2013, 2018, 2023 (\$m), 2013-2023 CAGR (%)

Table 9.3 Leading National Proppants Market Forecasts Summary 2013, 2018, 2023 (\$m), 2013-2023 CAGR (%)

List Of Figures

LIST OF FIGURES

- Figure 2.1 Global Proppants Market Structure
- Figure 2.2 Global Proppants Demand Structure
- Figure 2.3 Types of Proppant
- Figure 2.4 Hydraulic Fracturing Fluid Composition (%)
- Figure 2.5 Conventional & Unconventional Hydrocarbon Resources Cross-Section
- Figure 3.1 Global Proppants Market Forecast 2013-2023 (\$m, AGR %)
- Figure 3.2 WTI (\$/bbl) versus Henry Hub (HH) (\$/MMBtu), 2001-2012
- Figure 4.1 Proppants Submarket Sales Forecasts 2013-2023 (\$m) - Stacked
- Figure 4.2 Proppants Submarket Sales Forecasts 2013-2023 (\$m) - Individualised
- Figure 4.3 Proppants Submarkets Share Forecast (by sales \$m) 2013 (%)
- Figure 4.4 Proppants Submarkets Share Forecast (by sales \$m) 2018 (%)
- Figure 4.5 Proppants Submarkets Share Forecast (by sales \$m) 2023 (%)
- Figure 4.6 Submarkets Market Share Change (by sales value, \$m), 2013-2023
- Figure 4.7 Proppants Submarket CAGR%, 2013-2018, 2018-2023, 2013-2023
- Figure 4.8 Ceramic Proppants Market Forecast 2013-2023 (\$m, AGR %)
- Figure 4.9 Ceramic Proppants Market Share Forecast 2013, 2018 and 2023 (% Share)
- Figure 4.10 Bauxite Production, 2010-2011 (Thousand Metric Dry Tons)
- Figure 4.11 Bauxite Reserves (Thousand Metric Dry Tons)
- Figure 4.12 Resin Coated Sand Market Forecast 2013-2023 (\$m, AGR %)
- Figure 4.13 Resin Coated Sand Market Share Forecast 2013, 2018 and 2023 (% Share)
- Figure 4.14 Frac Sand Market Forecast 2013-2023 (\$m, AGR %)
- Figure 4.15 Frac Sand Market Share Forecast 2013, 2018 and 2023 (% Share)
- Figure 5.1 Leading National Proppants Markets Forecast 2013-2023 (\$m)
- Figure 5.2 Leading National Proppants Market Share Forecast 2013 (%)
- Figure 5.3 Leading National Proppants Market Share Forecast 2018 (%)
- Figure 5.4 Leading National Proppants Market Share Forecast 2023 (%)
- Figure 5.5 Barriers to Entry vs. 2013 National Market Size vs. CAGR (%) 2013-2023
- Figure 5.6 US Proppants Market Forecast 2013-2023 (\$m, AGR %)
- Figure 5.7 US Proppants Market Share Forecast 2013, 2018 and 2023 (% Share)
- Figure 5.8 Break-even Prices for Top North American Shale Plays & 2012 Average HH gas price (\$/MMBtu)
- Figure 5.9 Eagle Ford Shale Producing Wells (BOE/day; Gas-Oil Ratio); Eagle Ford Petroleum Window (Oil, Wet Gas/Condensate, Dry Gas); Eagle Ford Shale Production (BOE/day)
- Figure 5.10 North American Shale Plays

Figure 5.11 North American LNG Import and Export Terminals (as of April 2013)

Figure 5.12 Map of LNG Import and Export Terminals in North America (as of April 2013)

Figure 5.13 US Natural Gas Consumption and Projection, 1995-2040 (quadrillion Btu)

Figure 5.14 North Dakota Natural Gas Production, 2000-2011 (mmcf/d)

Figure 5.15 US Tight Oil Production, 2000-2012, (mmbbl/d)

Figure 5.16 US Crude Oil Production, 1983-2013 (mmbbl/d)

Figure 5.17 Shale Well Productivity: Haynesville, Eagle Ford, Woodford, Marcellus, Fayetteville (mmcf/y, years)

Figure 5.18 Major Tight Gas Plays, Lower 48 States

Figure 5.19 Natural Gas Production, 1990-2035: Shale Gas, Tight Gas, Lower 48 Onshore Conventional, Lower 48 Offshore, Coalbed Methane, Alaska (tcf)

Figure 5.20 US Rotary Rig Count, 2007-2013 (Oil, Gas, Gas %)

Figure 5.21 US CBM Production, 1989-2010 (bcf)

Figure 5.22 US CBM Fields in the Lower 48 States

Figure 5.23 CBM Wells Drilled in the US vs. Henry Hub Spot Price and WTI Spot Price, 2004-2011 (number of wells drilled, \$/boe)

Figure 5.24 Russian Proppants Market Forecast 2013-2023 (\$m, AGR %)

Figure 5.25 Russian Proppants Market Share Forecast 2013, 2018 and 2023 (% Share)

Figure 5.26 Russian Total Oil Production, 2002-2012 (Thousand bpd)

Figure 5.27 Brent Crude vs. WTI Price, 2002-2013 (\$/bbl)

Figure 5.28 Chinese Proppants Market Forecast 2013-2023 (\$m, AGR %)

Figure 5.29 Chinese Proppants Market Share Forecast 2013, 2018 and 2023 (% Share)

Figure 5.30 Canadian Proppants Market Forecast 2013-2023 (\$m, AGR %)

Figure 5.31 Canadian Proppants Market Share Forecast 2013, 2018 and 2023 (% Share)

Figure 5.32 Oil and Gas Drilling Rigs in Canada, 2007-2013 (Number of Rigs)

Figure 5.33 Australian Proppants Market Forecast 2013-2023 (\$m, AGR %)

Figure 5.34 Australian Proppants Market Share Forecast 2013, 2018 and 2023 (% Share)

Figure 5.35 Australian Coal Seam Gas (Coalbed Methane) and Natural Gas Pipeline Map

Figure 5.36 Australian CBM Production, Surat & Bowen Basins (bcm), 1997-2012

Figure 5.37 Top 10 LNG Importers Worldwide (bcm)

Figure 5.38 RoW Proppants Market Forecast 2013-2023 (\$m, AGR %)

Figure 5.39 RoW Proppants Market Share Forecast 2013, 2018 and 2023 (% Share)

Figure 8.1 Leading Proppants Suppliers Categorised by Proppant Offering

Figure 8.2 Leading Publicly Listed Proppant Suppliers, Total Revenue (\$m) and Revenue in Sector (%)

Figure 9.1 Proppants Submarket CAGR Forecasts, 2013-2018, 2018-2023, 2013-2023 (CAGR %)

Figure 9.2 Proppants Submarket Sales Forecasts, 2012-2023 (\$m)

Figure 9.3 Leading National Proppants Market Sales Forecasts, 2012-2023 (\$m)

Figure 9.4 Leading National Proppants Market CAGR%, 2013-2018, 2018-2023, 2013-2023 (CAGR %)

COMPANIES LISTED

AGL Energy
Alma International
Anadarko
Apache
Arrow Energy
Atlas Resin Proppant (owned by Badger Mining Corporation)
AWE
Baltic Ceramics
Baker Hughes
Beach Energy
BC LNG Export Cooperative LLC
BG Group
Black Cat
BorProp
BNSF
BP
BP America
Brownwood Clay
Cadre Proppants
Canadian Sand & Proppants
Canfrac Sands
Carbo Ceramics
Cambridge Energy FLNG (CE FLNG)
CNOOC - China National Offshore Oil Company
CNPC - China National Petroleum Company
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Chevron
Cheniere
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Chubu Electric Group

Coated Sand Solutions
ConocoPhillips
Continental Resources
Cuadrilla Resources
Dart Energy
Devon Energy
Dominion Resources
Dow Corning
Downeast LNG
Drillsearch
EOG Resources
Empire Oil and Gas
Erna Frac Sand
Excelerate Energy
ExxonMobil
Fairmount Minerals
Falcon Oil & Gas
Flexfrac
Fores LLC
Fractstar
Freeport LNG
FTS International
Gasfin Development
Gazprom
Gazprom Neft
Goose Landing Sand Company
Great Plains Sand
Gulf Coast LNG Export
Gulf LNG Liquefaction
Haisla
Halliburton
Henan Provincial Coal Seam Gas Development and Utilization Co.
Hess Corporation
Hi Crush Partners
Hilcorp Resources
Husky Energy
Imerys
Inpex Browse Ltd.
Interstate Energy Partners

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Koch Minerals
KOGAS
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LNG Canada
LNG Limited
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Lukoil
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Murphy Oil
New Century Proppant Technology
New Standard Energy
Norwest Energy
Occidental Petroleum
Oregon LNG
Origin Energy
Osaka Gas
Oxane
Pangea LNG
Penn Virginia
Petroleos Mexicanos (Pemex)
PetroChina

Petrofrontier
Petronas
Pieridae Energy Canada Ltd.
Pioneer Natural Resources
Preferred Sands
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Progress Energy
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Wanli
Wardrup Engineering
Weatherford International
Whibco Inc.
Whiting Petroleum Corp.
Wildcat Minerals
Woodside
Yixing Orient Petroleum Proppant Co. Ltd
YPF

GOVERNMENT AGENCIES AND OTHER ORGANISATION MENTIONED IN THIS REPORT

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American Petroleum Institute (API)
Australian Department of Resources, Energy & Tourism
Government of New South Wales, Australia
Directorate General of Hydrocarbons (India)
Ministry of Land and Resources (China)
Ministry of Water Resources (China)
National Energy Administration of China (NEA)
National Development and Reform Commission of China (NDRC)
Queensland Government, Australia
SPE (Society of Petroleum Engineers)
US Coast Guard (USCG)
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