

SUMMARY SLIDE DECK

OILFIELD MINERALS & MARKETS FORUM HOUSTON 2023

Hilton Houston Post Oak, 9-11 May 2023



Supply & demand trends for minerals used in oilfield applications

Sponsors



Broychim



برواشيم



Announcing for 2024 *(click for details)*

BARITE & OILFIELD MINERALS **FORUM** 2024

5-7 June 2024

The Royal Sonesta Hotel Houston Galleria



Supply & demand trends for barite & minerals in oilfield applications

Exhibitor

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The
Barytes
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We are now broadening the scope of the event to incorporate the wider barite market outside the oilfield market, ie. including **supply and demand for chemical and filler grade barite**.

This exciting initiative is the result of agreement reached with **The Barytes Association** for IMFORMED to now manage an annual conference devoted to all aspects of the barite industry. The association will hold its annual General Assembly at the same venue prior to the Barite & Oilfield Minerals Forum.

This unique conference will bring together under one roof the major players across the global barite and oilfield mineral supply chain, from producers, processors, and traders to logisticians, financiers, and end use consumers.

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OILFIELD MINERALS & MARKETS **FORUM** HOUSTON 2023

Hilton Houston Post Oak, 9-11 May 2023

Welcome Reception Sponsor



Day 1 Lunch Sponsor



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OILFIELD MINERALS & MARKETS **FORUM** HOUSTON 2023

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Supply & demand trends for minerals in oilfield applications

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Active Minerals International LLC
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Essential Minerals Association
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Prodexa de Mexico
Rescom Mineral Trading FZE
Revelle Shipping Agency Inc
Rystad Energy
S&P Global Commodity Insights
Schlumberger
Sojitz Corporation of America
Southwest Land & Minerals Corp.
Superior Weighting
Texan Minerals & Chemicals LLC
Valence Drilling Fluids
Valls Logistics
Viking Shipping Hong Kong
Viking Shipping Norway

“Excellent presentations and speakers.”

Juan Luis Prieto, Managing Director, Baramin, Mexico

“Overall solid programme, with good coverage for other minerals besides barite”

Alastair John, Well Construction Fluids Bulk Chemicals, SLB, USA

Enjoying some good discussions around barite, supply chain, and oilfield chemicals outlook at the IMFORMED Forum in Houston. Really appreciate sharing the subject info and presentations. Please keep me updated on any future events.

Justin Gauthier, US Business Strategist, AES Drilling Fluids, USA

I want to thank you so much for sharing this information and for the great organisation of the Forum.

Pablo Seijo, Senior Technical Sales Manager, Mineralia, Spain

This was my first experience to visit this conference: much informative and a nice gathering, meeting in one place and interacting, thank you for the nice management.

Shankar Lal Daruka, Managing Director, Daruka & Company (Mica) Pvt Ltd, India

Thanks for hosting a great event and I look forward to attending in the future.

Eric Battersby, Trade Development Manager, Port of Corpus Christi, USA

Thank you and appreciate you guys putting on the conference. Had a wonderful time and thoroughly enjoyed it.

Zach Blocker, Customer Service Manager, M/G Transport Services LLC, USA

Industrial minerals & the oilfield market



Industrial minerals & the oilfield market



Mining →



Processing →



Logistics →



Oilfield Market Application

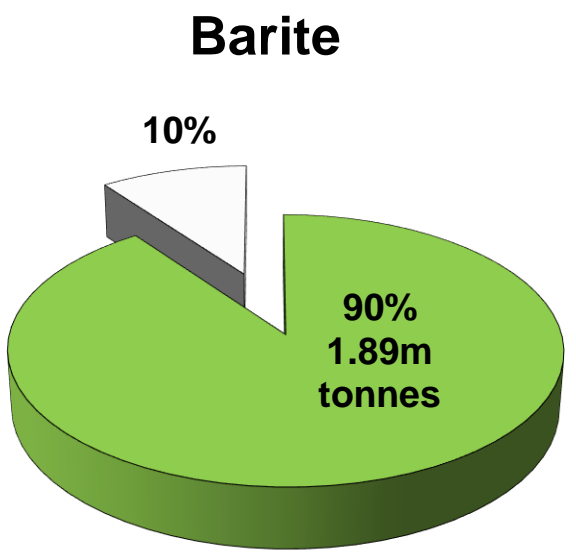
- | | |
|-------------------|--------------------|
| Attapulgite | Lignite |
| Barite | Lime |
| Bauxite | Magnesia |
| Bentonite | Magnesium silicate |
| Borates | Magnesium chloride |
| Calcium carbonate | Manganese oxide |
| Calcium chloride | Mica |
| Diatomite | Perlite |
| Garnet | Pollucite |
| Gilsonite | Potash |
| Graphite | Salt |
| Gypsum | Sepiolite |
| Haematite | Silica sand |
| Hectorite | Soda ash |
| Ilmenite | Sodium silicate |
| Iron oxide | Vermiculite |
| Kaolin | Zinc oxide |
| Leonardite | Zirconia |

Industrial minerals & the oilfield market

US oilfield major volume minerals

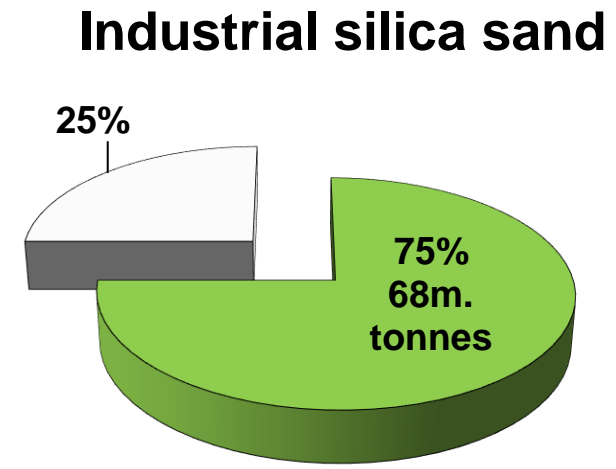
US oilfield market 2022 (USGS)

Barite	1.89m t ; >75% imported
Bentonite	830,000 t
Silica sand	68m t



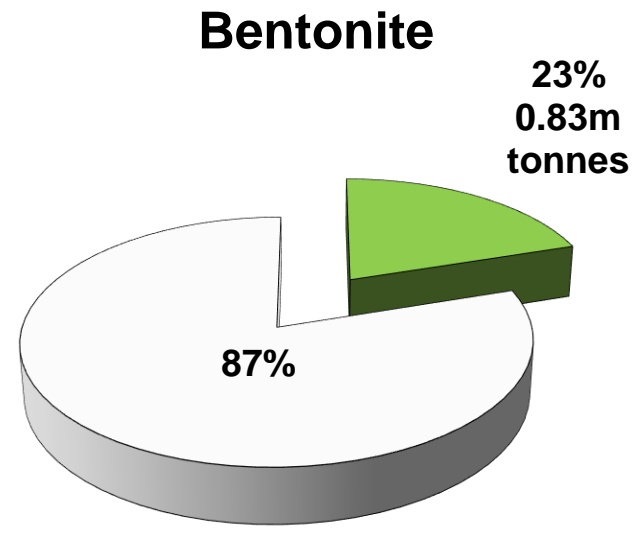
Up from 2021
1.5m t
90%

- Drilling - weighting agent
- Other



Up from 2021
43m t
64%

- Proppants & well cement
- Other



Slightly up from 2021
0.7m t
22%

- Drilling - rheological agent
- Other

Source: USGS 2023

Industrial minerals & the oilfield market

A wide range of vital applications

- Drilling
- Stimulation
- Production
- Well cementing
- Surface cleaning



Industrial minerals & the oilfield market

Oilfield applications use range of minerals

Function	Mineral
Weighting agents high SG; help offset pressure; control liquid flow into wellbore from formation; keep the hole open	barite, haematite, calcium carbonate
Bridging agents plug pore spaces at wellbore, restricting invasion of solids and fluids into the formation	calcium carbonate, salt, graphite
Viscosifiers Carry cuttings to surface; build a cake against permeable formations; lubricates drill string.	sodium bentonite, treated calcium bentonite for freshwater muds; attapulgite and sepiolite for saltwater muds; organophillic clays for oil muds, leonardite
Stabilisers Prevents dissolution of formation	Gilsonite, salt, gypsum, asphalt, leonardite



Industrial minerals & the oilfield market

Oilfield applications use range of minerals

Function	Mineral
Lost circulation materials used to plug or seal pores and cracks in the formation	Gilsonite, mica, diatomite, calcium carbonate, graphite, lignite, expanded perlite & vermiculite (bentonites, organophilic clays)
Cross-linker Hydrated polymers or gels (guar gum) are cross linked by borate ions to provide increased viscosity. Benefits include, good proppant transport, stable fluid rheology at high temperatures, low fluid loss, and good clean up properties.	sodium borates
Lubricants Lubrication of drill bit and drill pipe	graphite, bentonite, asphalt
Proppants Hold open fractures to enable oil and gas flow (conductivity)	silica sand, calcined bauxite, calcined kaolin, magnesium silicate



PROGRAMME

WEDNESDAY 10 MAY

08:00 **Registration**

OVERVIEW

09:00 **Welcome & Introduction**

Ismene Clarke, Director & Mike O'Driscoll, Director, INFORMED, UK

09:30 **Oil & gas supply demand outlook**

Panuswee Dwivedi, Project Manager, ADI Analytics LLC, USA

10:00 **The energy transition: a reality check**

Uday Turaga, CEO, ADI Analytics LLC, USA

10:30 COFFEE

OILFIELD ADDITIVES | LOGISTICS

11:30 **Overview of oilfield chemicals & minerals: demand outlook**

Dr Heike Held, Research & Analysis Associate Director,
S&P Global Commodity Insights, USA

12:00 **Port logistics: the jugular for US oilfield mineral imports**

Eric Battersby, Trade Development Manager,
Port of Corpus Christi Authority, USA

12:30 **Shipping market review**

Joachim Boeckmann, Chartering & Agency Manager,
Stewart Perrin, Managing Director Hong Kong, &
Jesper Hoppe, Managing Director,
Viking Shipping Co. AS, Norway

13:00 LUNCH SPONSORED BY



PROGRAMME

WEDNESDAY 10 MAY (CONTINUED)

PROPPANTS | BENTONITE | ATTAPULGITE

- 14:30 **Frac sand market outlook**
Justin Mayorga, Vice President - Shale Supply Chain Research,
Rystad Energy, USA
- 15:00 **Optimising the oilfield minerals value chain:
barite & bentonite mining overview**
David Losoff, Senior Mining Engineer, Halliburton, USA
- 15:30 **Attapulгите supply and usage in oilfield applications**
Thomas Cortner, International Sales Manager,
Active Minerals International LLC, USA

16:00 COFFEE

PROGRAMME



WEDNESDAY 10 MAY (CONTINUED)

16:30 ROUNDTABLE BREAKOUT

HOSTED THEMED ROUNDTABLES FOR INFORMAL DISCUSSION & NETWORKING

Barite	John Newcaster, Oil & Gas Advisor, The Barytes Association, USA
Clays & Other Minerals	Thomas Cortner, International Sales Manager, Active Minerals International LLC, USA Yohnny Gonzalez, Business Development Manager, Americas Oilfield, Elkem ASA, USA
Logistics	Eric Battersby, Trade Development Manager, Port of Corpus Christi Authority, USA
Proppants	Justin Mayorga, Vice President - Shale Supply Chain Research, Rystad Energy, USA

17:30 DRINKS RECEPTION & CLOSE OF DAY 1



PROGRAMME

THURSDAY 11 MAY

WEIGHTING AGENTS 1: ILMENITE | BARITE

- 09:00 **MICRODENSE™ - A new building block to achieve operational efficiency in drilling & completion operations**
Yohnny Gonzalez, Business Development Manager Americas Oilfield, Elkem ASA, USA
- 09:30 **A new chapter in barite supply**
David Henrick, President Oil & Gas Business Unit, CIMBAR Resources Inc., USA
- 10:00 **Barite market global overview**
John Newcaster, Oil & Gas Advisor, The Barytes Association, USA

10:30 COFFEE

WEIGHTING AGENTS 2:

BARITE IN MOROCCO | GUATEMALA | NIGERIA

- 11:30 **Broychim and Morocco barite supply update**
Youssef Laghzali, Sales Manager, Broychim, Morocco
- 12:00 **Barite resources in Guatemala**
Iliana Díaz, Business Administrator, Guatemala Minerals, Guatemala
- 12:30 **Nigeria's barite resources, utilisation, challenges & future prospects**
Maazi Obinna, Founder & Executive Director, Economic Strategic Growth And Development Initiative of Africa (ESGADIA), Nigeria

WITHDRAWN

13:00 LUNCH & END OF CONFERENCE

IMFORMED

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Sponsorship/Exhibit/Registration Enquiries

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Programme/Speaker Enquiries

Mike O'Driscoll mike@imformed.com | T: +44 (0)7985 986 255



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 - **Salt**

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AT A GLANCE
A-Z GUIDE
WHICH MINERALS
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MARKETS

- Leading industrial minerals
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- Key specified chemical component
- World production
- Main source countries
- Leading consuming markets

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ASBESTOS							●		
ATTAPULGITE		●							
BADDELEYITE			○			●	●	○	
BARYTES (BARITE)				○		●	●		
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XII EUROPEAN CONGRESS OF
**REFRACTORY
RAW MATERIALS,
MACHINERY &
INSTALLATION**

Meliá Lebreros, Seville
13-14 March 2024

MINERAL RECYCLING
FORUM 2024 

Hilton Imperial Dubrovnik, 22-24 April 2024

Secondary raw material sources, supply, processing, and markets

MAGFORUM 2024 

Magnesium Minerals & Markets Conference

The Pomegranate Wellness Spa Hotel,
Halkidiki — 13-15 May 2024

FIELD TRIP: Grecian Magnesite, Yerakini

FLUORINE FORUM 2024

Ulaanbaatar
October 2024



FIELD TRIP: Mongolczechmetall, Chuluut Tsagaan Del, Bayantsagaan, Tuv

CHINA REFRACTORY MINERALS FORUM 2024

InterContinental Dalian
21-23 October 2024



FIELD TRIP: Haimag, Haicheng, Liaoning

SALT FORUM 2024

OILFIELD MINERALS & MARKETS
FORUM HOUSTON 2023 

Hilton Houston Post Oak, 9-11 May 2023

Participate
Learn
Enjoy