

OILFIELD MINERALS & MARKETS **FORUM** Middle East 2018

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Hilton Houston Post Oak, Houston, 6-8 May 2018

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Supply and demand trends for industrial minerals in the oilfield market

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OILFIELD MINERALS & MARKETS **FORUM** HOUSTON 2018

Hilton Houston Post Oak, Houston, 6-8 May 2018

Confirmed speakers

Outlook for oil and gas supply and demand

Uday Turaga, CEO, ADI Analytics Inc., USA

Oilfield mineral demand and outlook in drilling fluids

Veronica Brown, VP of Supply Chain, QMax Solutions Inc., USA

The most common INCOTERMS mistakes that shippers and importers make

John Newcaster, Director Southwest, The Cumberland Group Inc., USA

Logistic challenges: rates rise as demand and regulatory constraints bite

Richard Dodd, President, RDC Logistics, USA

An emerging new frac sand supplier for Asia-Pacific markets

Murray Lines, Managing Director, Stratum Resources, Australia

North American proppants market trends and developments

Joel Schneyer, Managing Director, Minerals Capital & Advisory Practice, Capstone Headwaters, USA

Overview and outlook for the barite supply market

The Barytes Association, UK

Chinese barite supply, and the recent impact of environmental controls

Rita Hu, General Manager, Guizhou Saboman Imp. & Exp. Co. Ltd, China

Exploration and development of barite at Surprise Creek, British Columbia

Rene Bernard, Director, Mountain Boy Minerals Ltd, Canada

Evaluation of drilling grade barite: methods and mineralogy

Andrew Scogings, Consultant, Australia

Oilfield well cements: raw material demand

Claudio Manissero, President, ChemCognition LLC, USA

Separation technology for oilfield minerals: solutions for testing and mobility

Steve Gray, Consultant, ST Equipment & Technology LLC, USA

A revolutionary new concept in oilfield mineral milling: Mobility and Modularity

Jean-Francois Maréchal, Managing Director, Poittemill, France

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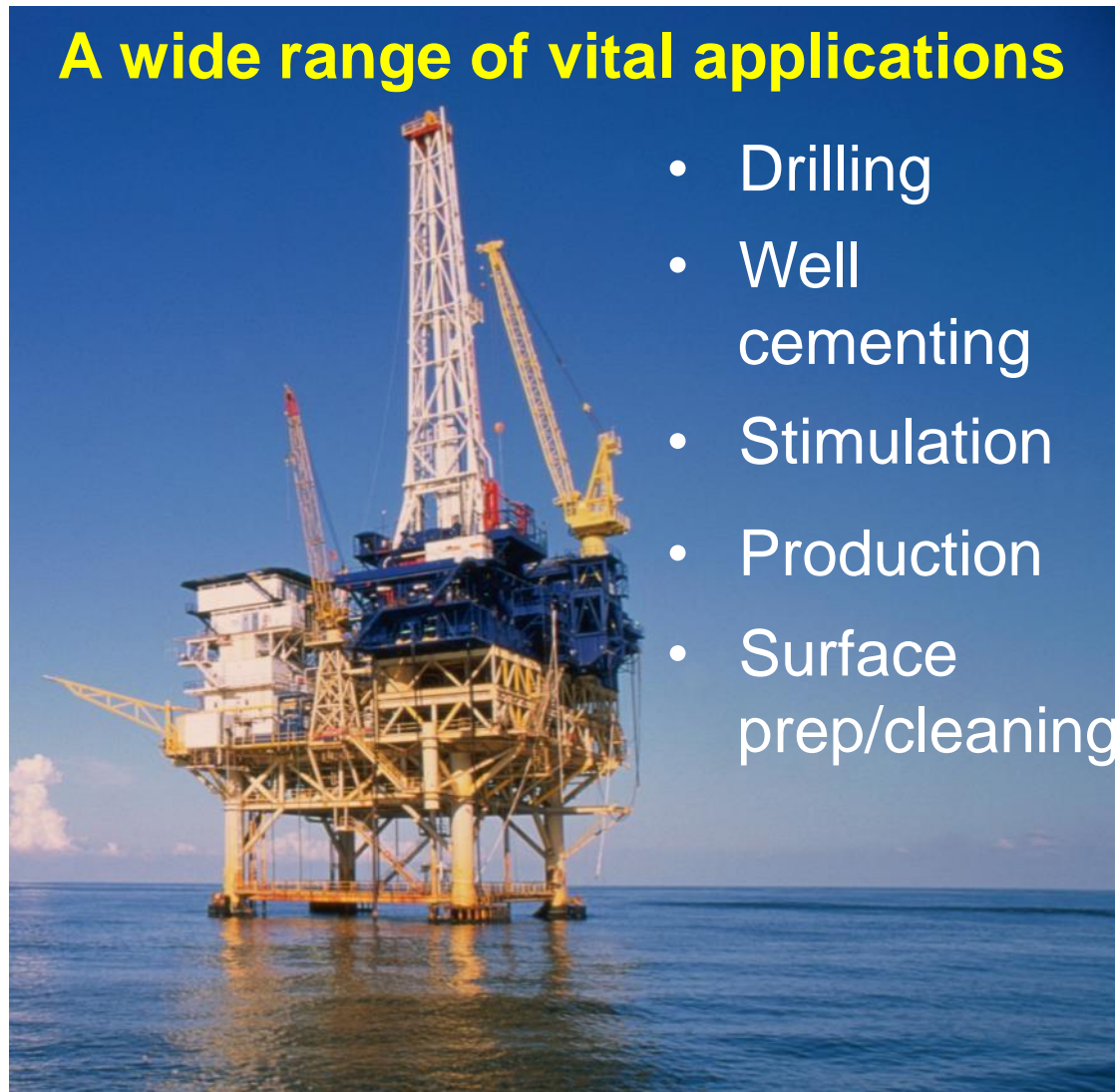


Industrial minerals & the oilfield market



A wide range of vital applications

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



Industrial minerals & the oilfield market

A wide range of minerals used

Attapulgite
 Barite
 Bauxite
 Bentonite
 Borates
 Calcium carbonate
 Calcium chloride
 Diatomite
 Garnet
 Gilsonite
 Graphite
 Gypsum
 Haematite
 Hectorite
 Ilmenite
 Iron oxide
 Kaolin



Source: OGP/PIECA

Lignite
 Lime
 Magnesia
 Magnesium silicate
 Magnesium chloride
 Mica
 Perlite
 Potassium chloride
 Salt
 Sepiolite
 Silica sand
 Soda ash
 Sodium silicate
 Vermiculite
 Zinc oxide
 Zirconia



Industrial minerals & the oilfield market

For a wide range of applications

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
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
Stabilisers Prevents dissolution of formation	Gilsonite, salt, gypsum



Industrial minerals & the oilfield market

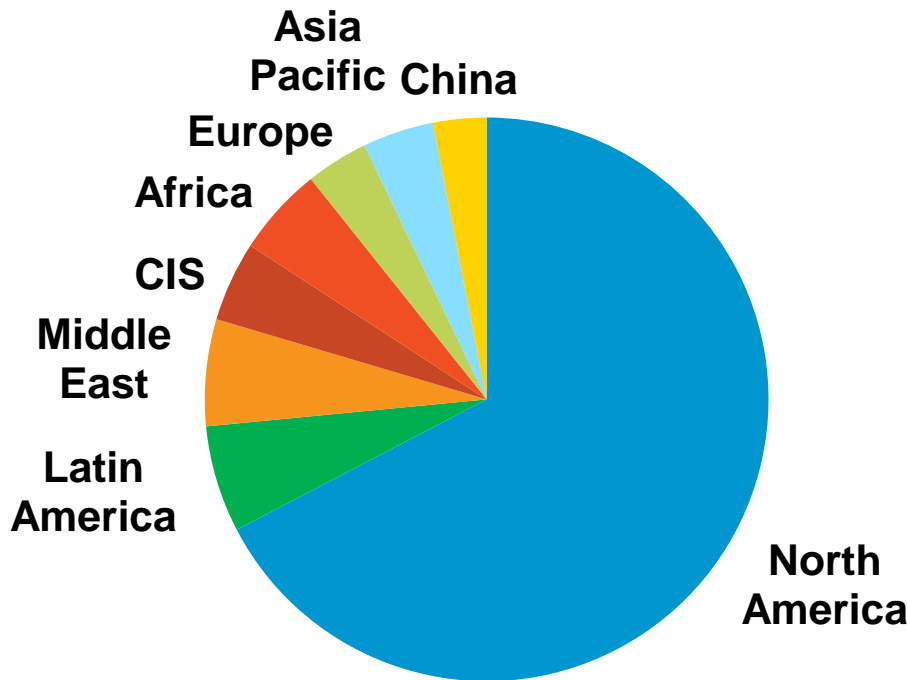
Function	Mineral
Lost circulation materials used to plug or seal pores and cracks in the formation	Gilsonite, mica, diatomite, expanded perlite and vermiculite (bentonites, organophilic clays)
Cross-linker Hydrated polymers or gels (guar gum) are cross linked by borate ions to provide increased viscosity. 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
Proppants Hold open fractures to enable oil and gas flow (conductivity)	silica sand, calcined bauxite, calcined kaolin, magnesium silicate



Drilling fluids market

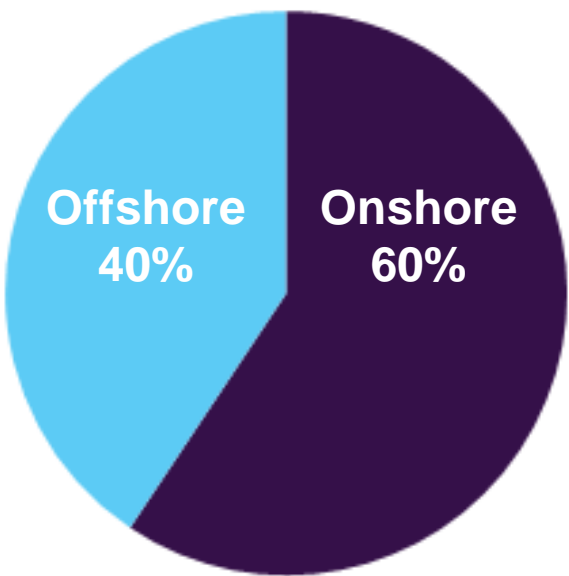
Market value estimated to grow from US\$7.6bn to US\$10.01bn by 2025

Oilfield chemicals market:
regional share by value



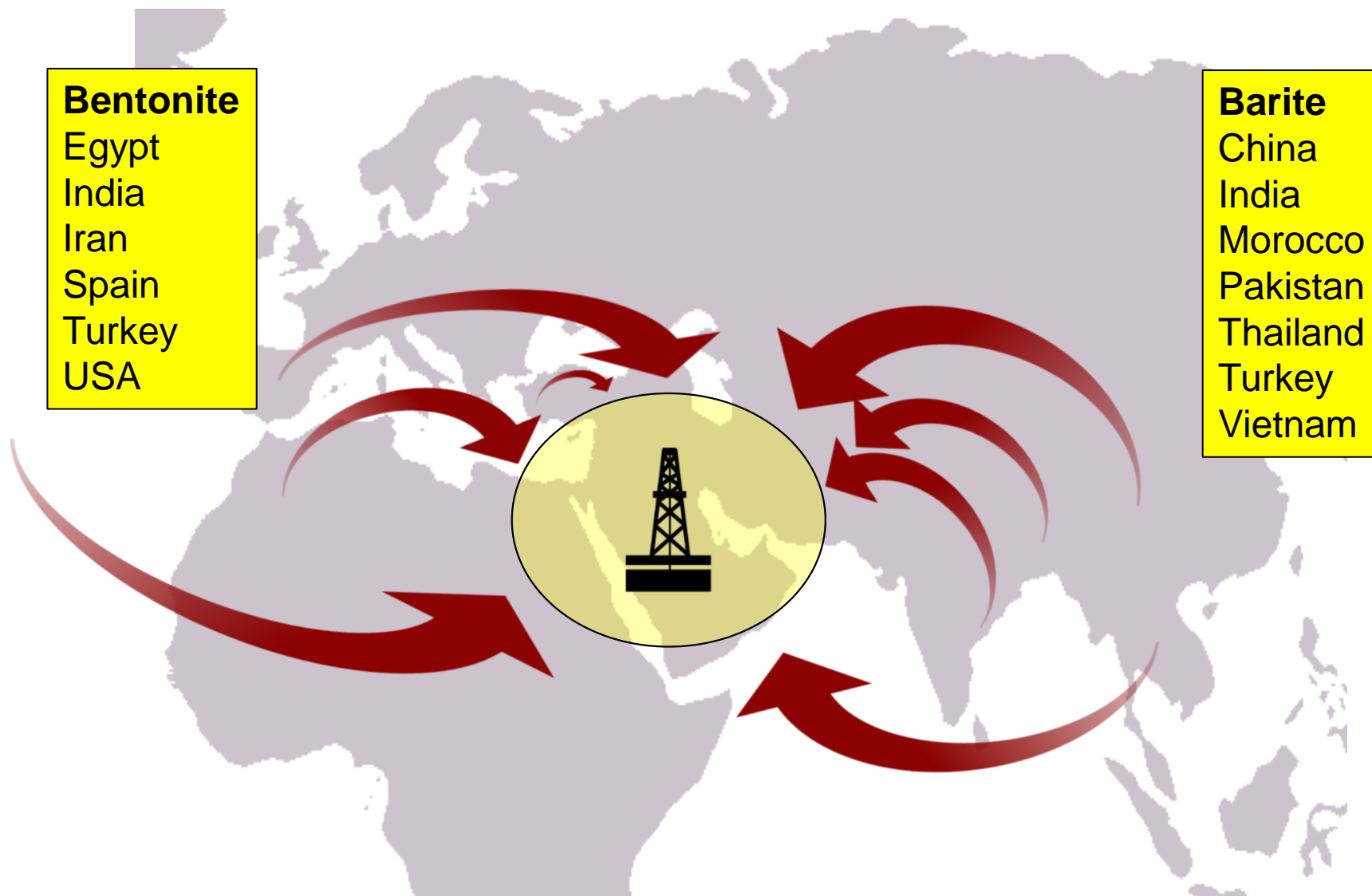
Source: IHS 2017

Drilling fluids market:
onshore v offshore



Source: Grand View Research 2017

Middle East oilfield mineral sources: examples



Middle East rig count Jan. 2018

	THIS MONTH			VARIANCE	LAST MONTH			LAST YEAR		
Country	Land	OffShore	Total	From Last Month	Land	OffShore	Total	Land	OffShore	Total
Middle East										
ABU DHABI	37	12	49	2	38	13	51	32	16	48
DUBAI	0	2	2	0	0	2	2	0	2	2
IRAQ	54	0	54	-3	51	0	51	41	0	41
JORDAN	0	0	0	0	0	0	0	0	0	0
KUWAIT	53	0	53	0	53	0	53	44	0	44
OMAN	55	0	55	0	55	0	55	59	0	59
PAKISTAN	0	0	0	19	19	0	19	21	0	21
QATAR	3	3	6	0	3	3	6	5	5	10
SAUDI ARABIA	92	19	111	4	98	17	115	110	15	125
SUDAN	0	0	0	0	0	0	0	0	0	0
SYRIA	0	0	0	0	0	0	0	0	0	0
YEMEN	0	0	0	0	0	0	0	0	0	0
TOTAL	294	36	330	22	317	35	352	312	38	350

North Africa

ALGERIA	50	0	50	5	55	0	55	52	0	52
EGYPT	17	5	22	0	19	3	22	18	6	24
LIBYA	0	1	1	0	0	1	1	0	1	1
TUNISIA	0	0	0	0	0	0	0	1	1	1
TOTAL	67	6	73	5	74	4	78	71	8	78

Source: Baker Hughes 2018



Conclusions: Reasons to be cheerful

- Oil price and GDP drivers very positive to boost energy demand, especially in ME, China, India.
- Hydrocarbons still majority share of energy mix, with gas increasing to around a 25% share at expense of coal and oil
- EVs are coming, but too early to have more than limited impact
- Rig activity is rising and upstream investments, with some caution, returning
- Rapid rise in power demand in ME to be met by gas as preferred energy source, driving exploration and development of unconventional resources
- Oil service majors very upbeat for 2018/19 outlook, especially USA but also international hotspots including ME
- Positive prospects for oilfield minerals demand!



Programme – Tuesday Morning

INTRODUCTION | OVERVIEWS

09.00 Introduction & Market Overview

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

09.30 The complexity and functionality of oil based drilling fluids and their mineral additives

Michael Tate, Technical Sales Manager, RheoMinerals Inc., USA

10.00 COFFEE

BARITE

11.00 Sustainability in drilling barite specifications

John Newcaster, Director Southwest, The Cumberland Group Inc., USA

11.30 Barite supply from Turkey and Middle East markets

Fatma Akgun, Deputy General Manager-Business Development, Ado Mining, Turkey

12.00 LUNCH



Programme – Tuesday Afternoon

PROCESSING

- 14.00 A revolutionary new concept in barite and bentonite processing: Mobility and Modularity**
Jean-Francois Maréchal, Managing Director, Poittemill, France
- 14.30 Processing developments for oilfield minerals**
Herve Guicherd, Director Business Development Minerals, ST Equipment & Technology LLC, France
- 15.00 PANEL DISCUSSION: Key challenges for the oilfield mineral market outlook**
Mike O'Driscoll, Director, IMFORMED, UK
Jean-Francois Maréchal, Managing Director, Poittemill, France
Herve Guicherd, Director Business Development Minerals, ST Equipment & Technology LLC, France
John Newcaster, Director Southwest, The Cumberland Group Inc., USA
Pickard Trepess, Managing Director, FRAC PT FZE, UAE
- 15.45 Refreshments & Close of Day 1**



Status & outlook for the market

Moderator

Mike O'Driscoll

Director, INFORMED, UK

Panellists

Jean-Francois Maréchal

Managing Director, Poitemill, France

Herve Guicherd

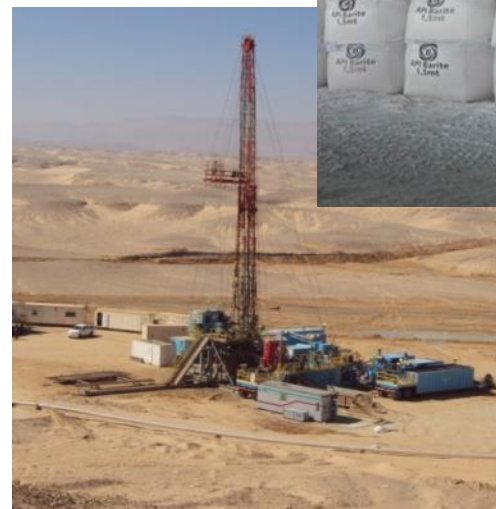
Director Business Development Minerals, ST
Equipment & Technology LLC, France

John Newcaster

Director Southwest, The Cumberland Group Inc.,
USA

Pickard Trepess

Managing Director, FRAC PT FZE, UAE



PLEASE JOIN IN!

**Questions & comments most
welcome from the audience**

Please state your name & affiliation



Programme – Wednesday Morning

PROPPANTS

- 09.00 Proppant utilisation and outlook in the Middle East**
Pickard Trepess, Managing Director, FRAC PT FZE, UAE
- 09.30 The Good, the Bad and the Ugly of ceramic proppant manufacturers in China**
Viviana Trevino, President, Changqing Proppant Corp., China

10.00 COFFEE

POZZOLAN / GILSONITE

- 11.00 Natural pozzolanic material and its application in oil well cementing**
Dionysios Kotinis, General Manager, Imerys Minerals Arabia LLC, Saudi Arabia
- 11.30 Iranian Gilsonite supply and application in oilfield markets**
H. Nezam Zadeh, Managing Director, Payapa Setak Inc., Iran
- 12.00 LUNCH & CLOSE OF CONFERENCE**



Ado Mining
Alrasheed
Ashapura Group
Bastion Capital
Broychim
Changqing Ceramic Proppant
Delmon Company Ltd
Ecutech
FRAC PT FZE
Garuda Group
Great-Chem Mineals Trading Co. Ltd
Guangxi Metals & Minerals Import & Export
Group Corp
Guizhou Saboman Imp & Exp. Co. Ltd
Guizhou Tianhong Mining Co. Ltd
Imerys Minerals Arabia LLC
IMFORMED LTD
Kaolin AD

MA'ADEN Saudi Arabian Mining Co.
Model Industrial Company Ltd
Omya International AG
Outlook General Trading
Oxford Business Group
Payapa Setak Inc
Poitemill
Rescom Holdings
RheoMinerals
RP Minerals
Rua Bulgaria
Saudi Carbonate Company Ltd
ST Technologies
Steinbock Barite
Steinbock Minerals
The Cumberland Group Inc
Viking Shipping





“The fact that I am able to come time and again and walk away with new found knowledge keeps me coming back”

Jerry McNamara, VP Operations, RheoMinerals Inc., USA

“Really provided good insight on this market and drivers”

Kumar Chenniappan, Senior Marketing Specialist, MA'ADEN, Saudi Arabia





Missed attending **Oilfield Minerals & Markets Forum Middle East 2018?**

A set of presentations (as PDF) maybe purchased:
Price £500 – please contact:

Ismene Clarke, T: +44 (0)208 224 0425; M: +44
(0)7905 771 494; E: ismene@imformed.com

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- **Specialist conferences**



MINERAL
MARKET
MATRIX

AT A GLANCE
A-Z GUIDE
WHICH MINERALS
FOR WHICH
MARKETS

MINERAL "Derivative" Synthetic	MARKETS*																				MINERAL "Derivative" Synthetic	MAIN RAW MATERIAL FEEDSTOCKS†	KEY SPECIFIED CHEMICAL COMPONENTS‡	WORLD PRODUCTION¶	MAIN SOURCE COUNTRIES§	
	Alumina	Aluminate	Aluminate	Aluminate	Aluminate	Aluminate	Aluminate	Aluminate	Aluminate	Aluminate	Aluminate	Aluminate	Aluminate	Aluminate	Aluminate	Aluminate	Aluminate	Aluminate	Aluminate	Aluminate						
ALUMINA																					ALUMINA	Bauxite	Al ₂ O ₃	6,000	China, USA, Germany	
ANDALUSITE																					ANDALUSITE	Stibnite	SiO ₂	300	South Africa, France, Peru	
ANTIMONY TRIOXIDE																					ANTIMONY TRIOXIDE	Chrysotile	n.a.	10	China, Russia, Tajikistan	
ASBESTOS																					ASBESTOS	n.a.	20,000	20,000	Russia, China, Brazil	
ATTAPULGITE																					ATTAPULGITE	n.a.	2,220	2,220	USA, Senegal, Spain	
BADDELEYITE																					BADDELEYITE	ZrO ₂	9	9	Russia	
BARYTES (BARIUM)																					BARYTES (BARIUM)	BaSO ₄	972	972	China, India, Morocco	
BAUXITE																					BAUXITE	Al ₂ O ₃	10,000	10,000	China, Guyana, Greece	
BENTONITE																					BENTONITE	(also Hectorite serves similar markets)	n.a.	17,500	USA, China, India	
BORATES																					BORATES	Borax; Colemanite; Kernalite; Ulexite	B ₂ O ₃	18,000	18,000	Turkey, USA, China
BROMINE																					BROMINE	Bittern; Seawater; Salt lakes	n.a.	750	750	Israel, USA, Jordan
CALCIUM CARBONATE																					CALCIUM CARBONATE	CaCO ₃	10,000,000	10,000,000	Global	
CELESTITE																					CELESTITE	Limestone; Dolomite; Marble; Chalk	SrSO ₄	250	250	China, Spain, Mexico
CHROMITE																					CHROMITE	Cr ₂ O ₃	1,000	1,000	South Africa, Turkey, Oman	
DIAMOND (INDUSTRIAL)																					DIAMOND (INDUSTRIAL)	(in carats 600)	2,000	2,000	DR Congo, Russia, Australia	
DIATOMITE																					DIATOMITE	SiO ₂	2,000	2,000	USA, China, Denmark	
DOLomite																					DOLomite	CaMgO	12,000,000	12,000,000	Global	
FELDSPAR																					FELDSPAR	Al ₂ Si ₂ Al ₂ Si ₂ O ₁₀ (OH) ₂	23,000	23,000	Turkey, Italy, China	
FLUORSPAR																					FLUORSPAR	CaF ₂	6,250	6,250	China, Mexico, Mongolia	
GARNET																					GARNET	n.a.	140,000	140,000	India, China, Australia	
GRAPHITE																					GRAPHITE	C	700	700	China, Brazil, India	
GYPsUM																					GYPsUM	Anhydrite	CaSO ₄	246,000	246,000	China, USA, Iran
HEMIMORPHITE																					HEMIMORPHITE	TiO ₂	6,600	6,600	Australia, South Africa, China	
IODINE																					IODINE	Bittern; Caliche nitrate	I ₂	52	52	China, Japan, USA
IRON OXIDE																					IRON OXIDE	Hematite; Goethite; Magnetite; Microcrystalline Iron Oxide; Limbrite	Fe ₂ O ₃	17,000	17,000	India, Pakistan, Spain
KALIN																					KALIN	Kalinite; Halloysite	Al ₂ Si ₂ Si ₂ O ₁₀ (OH) ₂	44,000	44,000	USA, Germany, China
KYANITE																					KYANITE	Alumina	Al ₂ O ₃	902	902	USA, India, Brazil
LIME																					LIME	Limestone; Dolomite; Chalk	CaO	350,000	350,000	China, USA, India
LITHIUM																					LITHIUM	Spodumene; Petalite; Lepidolite; Bittern; Salt lakes; Hectorite; Zinnwaldite	Li ₂ CO ₃ / Li ₂ O	100,000	100,000	Australia, Chile, China
MAGNESITE																					MAGNESITE	Magnesite; Serpentine; Brucite; Dolomite; Seawater; Bittern	MgCO ₃	25,000	25,000	China, Russia, Turkey
MAGNESIA																					MAGNESIA	n.a.	12,000	12,000	China, Russia, Turkey	
MANGANESE																					MANGANESE	Pyrolusite; Psilomelane	Mn ₂ O ₃ / MnO ₂	2,000	2,000	China, South Africa, Australia
MICA																					MICA	Muscovite; Phlogopite	n.a.	1,000	1,000	China, Russia, USA
MULLITE																					MULLITE	Alumina; Bauxite; Kalinite; Kyanite; Pyrophyllite	Al ₂ O ₃	1,000	1,000	USA, China, Brazil
NEPHELINE SYENITE																					NEPHELINE SYENITE	Al ₂ O ₃ / K ₂ O / Na ₂ O	5,600	5,600	Russia, Canada, Norway	
NITRATES																					NITRATES	Caliche ore; Nitrinite	NaNO ₃	550	550	Chile
OLIVINE																					OLIVINE	Dunite; Serpentine	MgO	8,000	8,000	Norway, Japan, Spain
PERILLITE																					PERILLITE	Phosphogite	P ₂ O ₅	3,800	3,800	China, Greece, Turkey
PHOSPHATE																					PHOSPHATE	Phosphogite	P ₂ O ₅	220,000	220,000	China, Mexico, USA
POTASH																					POTASH	Carminite; Kainite; Langbeinite; Sylvite	K ₂ O	36,000	36,000	Canada, Russia, Belarus
PUMICE																					PUMICE	n.a.	17,000	17,000	Turkey, Italy, Saudi Arabia	
PYROPHYLLITE																					PYROPHYLLITE	n.a.	1,000	1,000	South Korea, Japan, Pakistan	
QUARTZ																					QUARTZ	SiO ₂	250	250	USA, China, Norway	
RARE EARTHS																					RARE EARTHS	Monazite; Xenotime; Zircon; Zirconium	RE oxides	800	800	Australia, Sierra Leone, South Africa
RUTILE																					RUTILE	Halite	TiO ₂	269,000	269,000	China, India, USA
SALT																					SALT	Halite	NaCl	600	600	Spain, Turkey, USA
SEPOLITE																					SEPOLITE	Quartz	SiO ₂	200,000	200,000	China, USA, Italy
SILICA SAND																					SILICA SAND	SiC	1,000	1,000	China, Norway, Japan	
SILICON CARBIDE**																					SILICON CARBIDE**	Al ₂ O ₃	62	62	India	
SILLIMANITE																					SILLIMANITE	Magnesite-Alumina	MgO-Al ₂ O ₃	100,000	100,000	China, Germany, USA
SPINEL*																					SPINEL*	Trona; Nalcabite	Na ₂ CO ₃	14,000	14,000	USA, Turkey, China
SODA ASH																					SODA ASH	Salt-Limestone-Coke	Na ₂ CO ₃	37,000	37,000	China, Russia, Germany
SODA ASH*																					SODA ASH*	n.a.	8,000	8,000	China, Spain, Mexico	
SODIUM SULPHATE																					SODIUM SULPHATE	Pyrites; Recovered as by-product; Native sulphur	S	60,000	60,000	China, USA, Russia
SULPHUR																					SULPHUR	n.a.	6,000	6,000	China, India, USA	
TALC																					TALC	Vermiculite	n.a.	400	400	South Africa, USA, China
VERMICULITE																					VERMICULITE	n.a.	1,000	1,000	China, India, USA	
WOLLASTONITE																					WOLLASTONITE	Zirconite	n.a.	3,000	3,000	China, South Korea, USA
ZIRCON																					ZIRCON	Chlorophyllite; Chazotteite; Mondorite	n.a.	1,000	1,000	Australia, South Africa, China
ZIRCONIUM																					ZIRCONIUM	Zircon; Baddeleyite	ZrO ₂	200	200	China, USA, Japan

* Includes non-chemical component products in commercial grade, including those for high purity.

† Includes non-chemical component products in commercial grade, including those for high purity.

‡ Includes non-chemical component products in commercial grade, including those for high purity.

§ Includes non-chemical component products in commercial grade, including those for high purity.

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