

# The 2018 Oilfield

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# Big Question

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Will there be an  
oil industry in 20  
years?

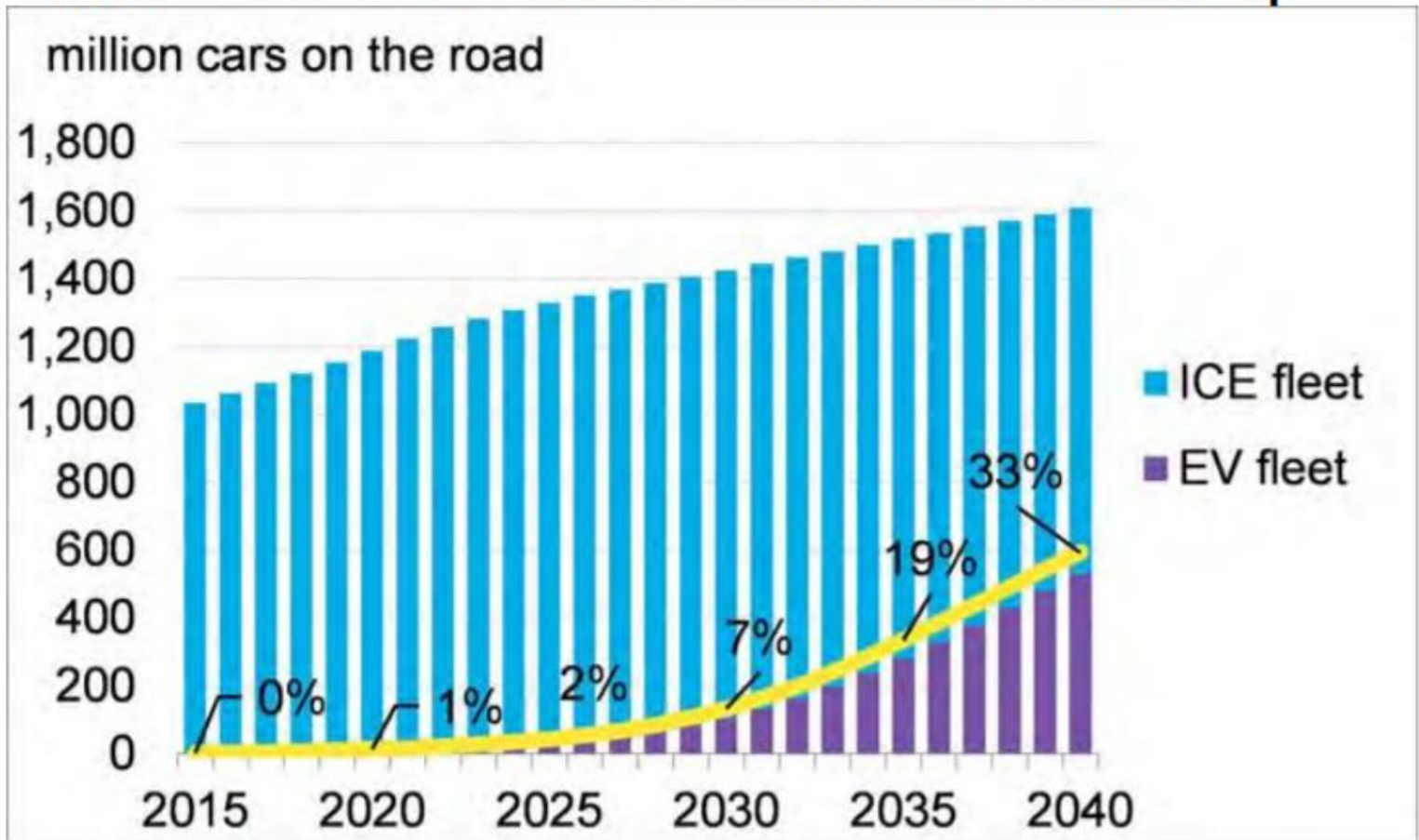
# ICE cars on the planet

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1 billion

# Highest case EV forecast

**Exhibit 3. NEF's Forecast For Global Auto Fleet Make-up**



Source: NEF

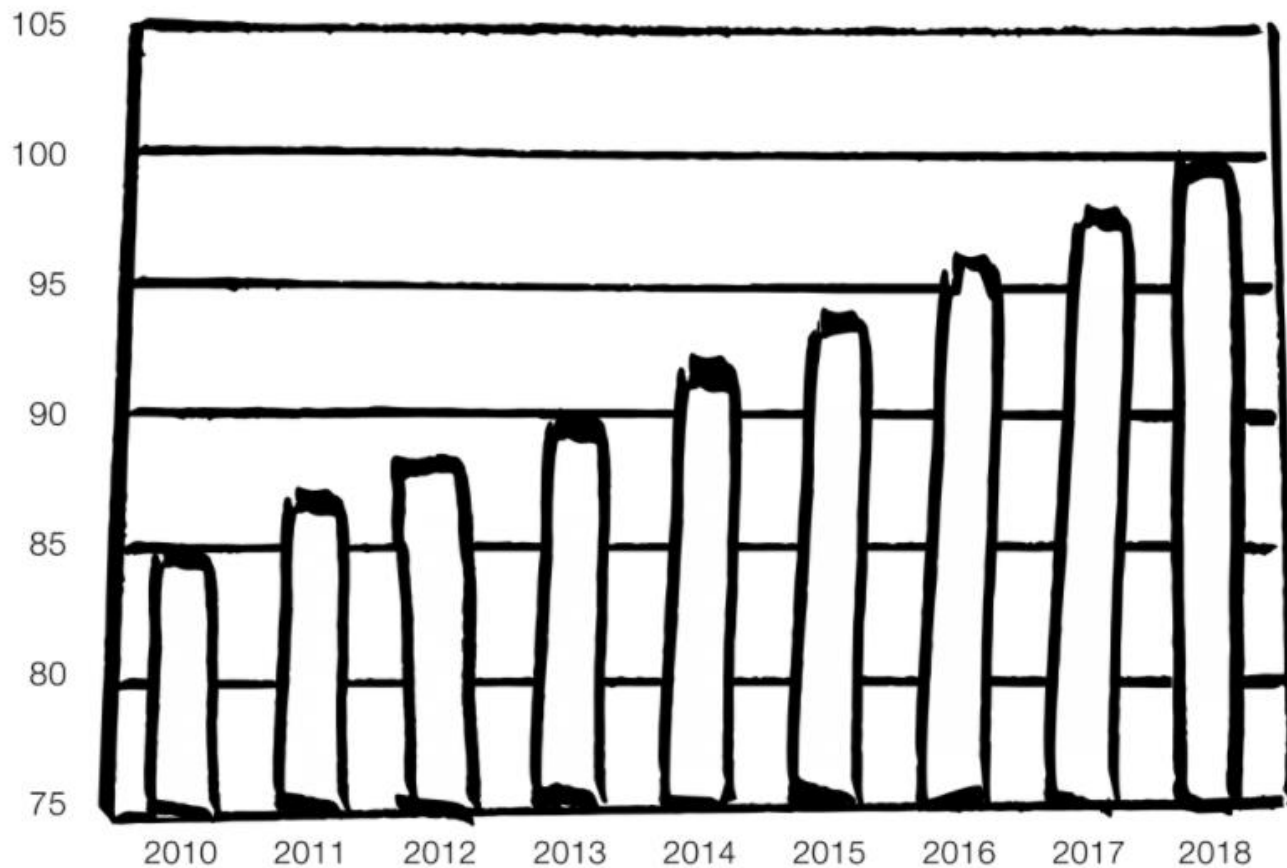
# ICE cars on the planet

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1.1 billion

# Oil Demand

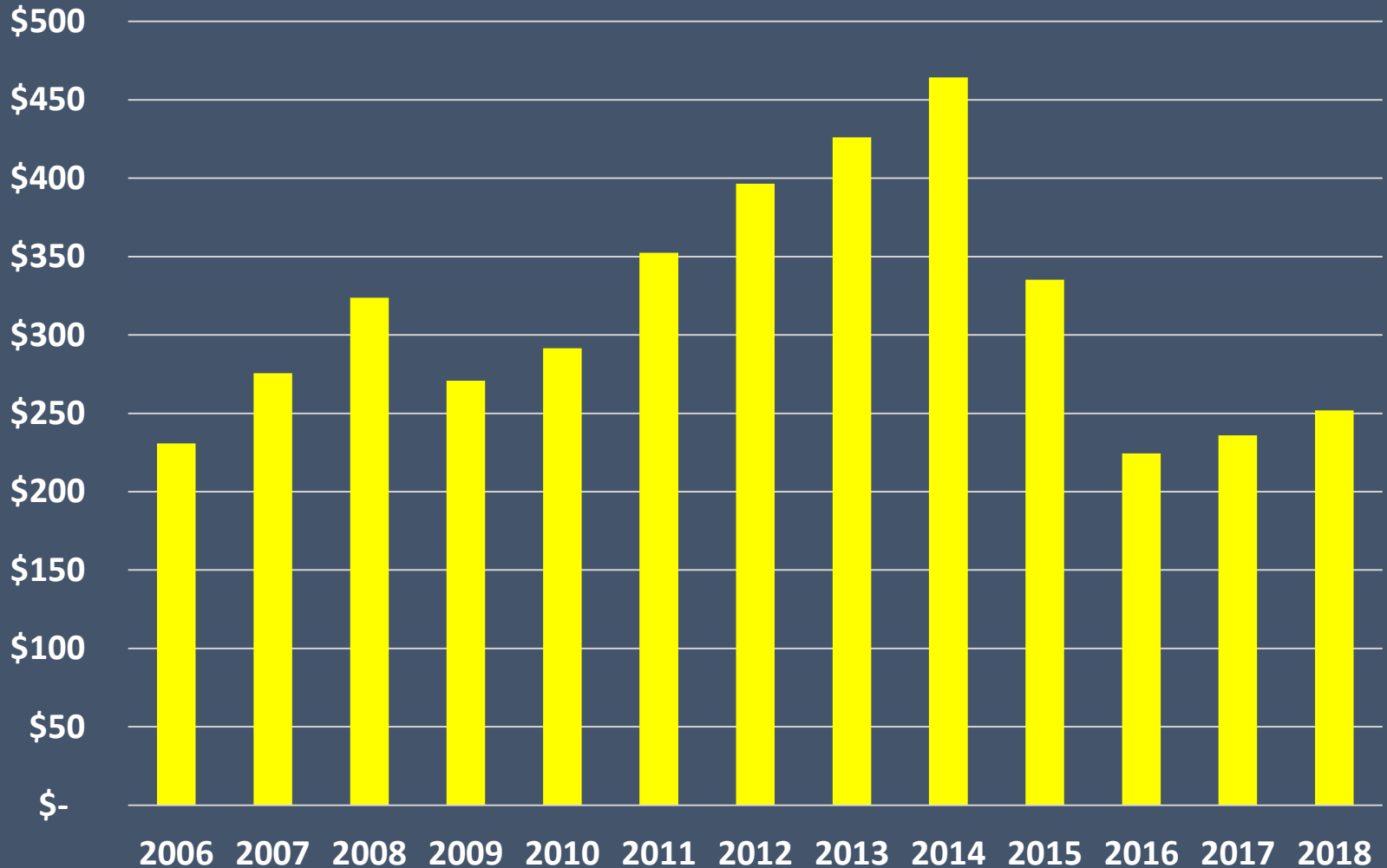
Millions of Barrels of Oil Demand per Day Globally



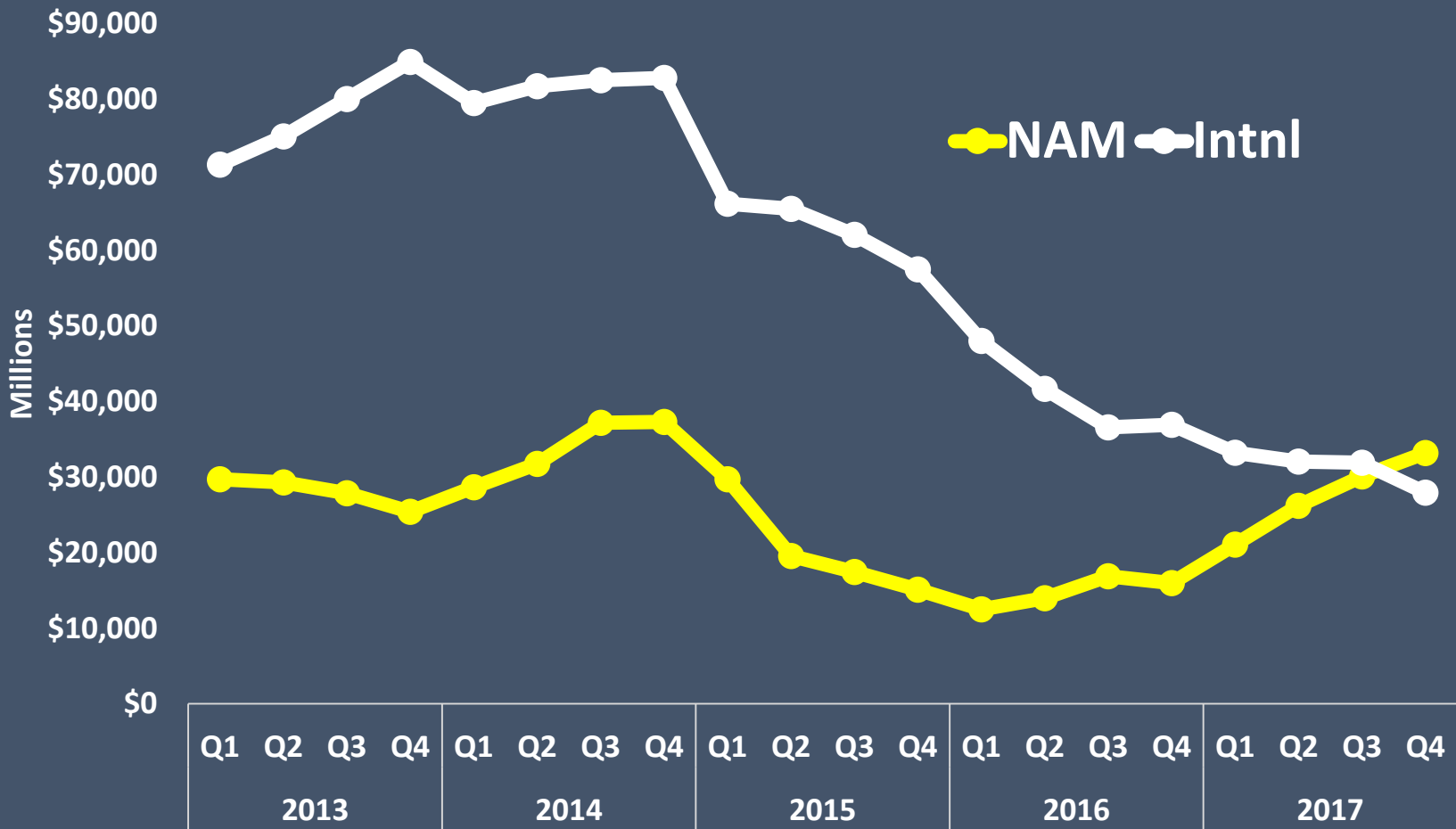
# Oil Price Over Time



# Oilfield Over Time (B)

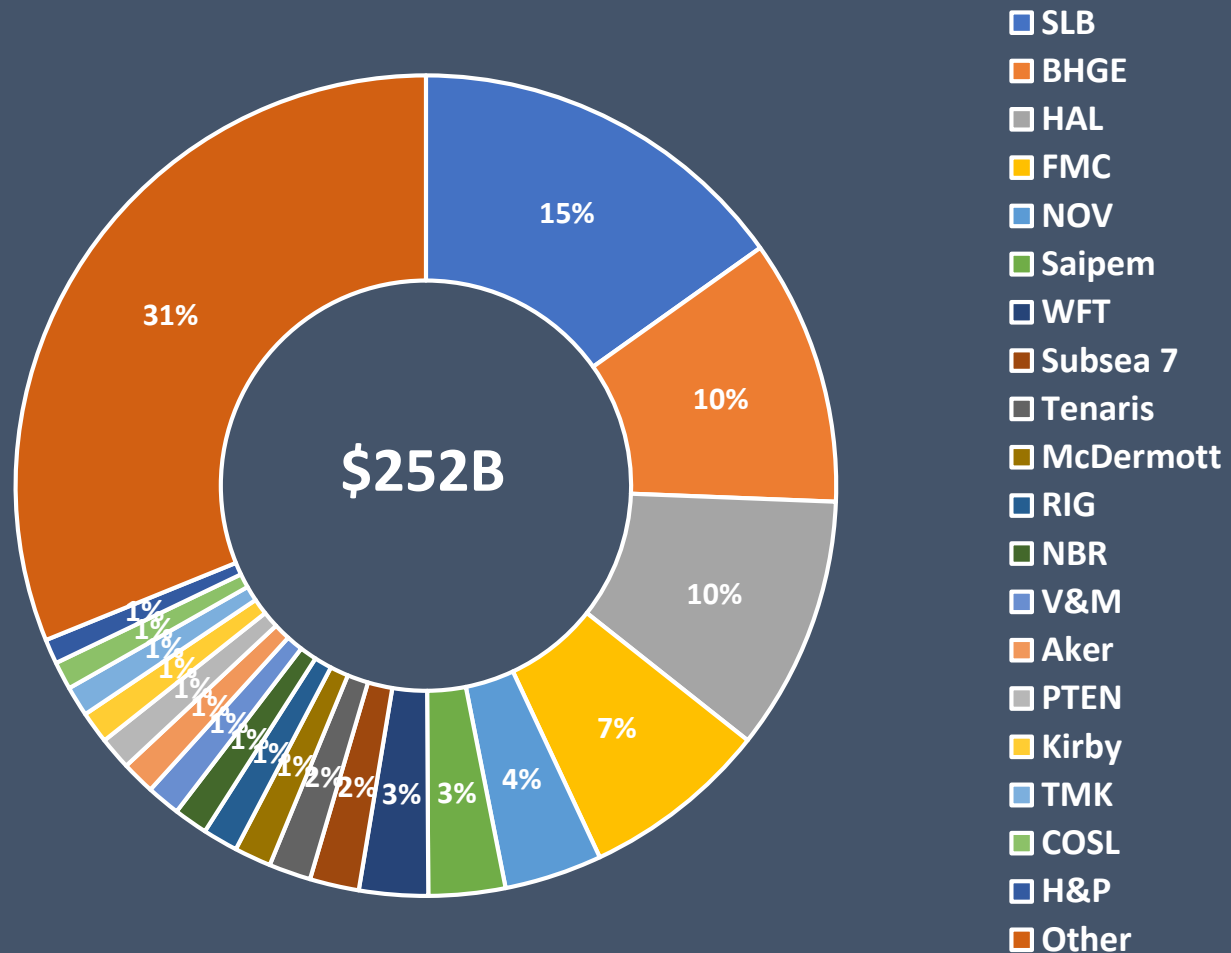


# Oilfield Spending



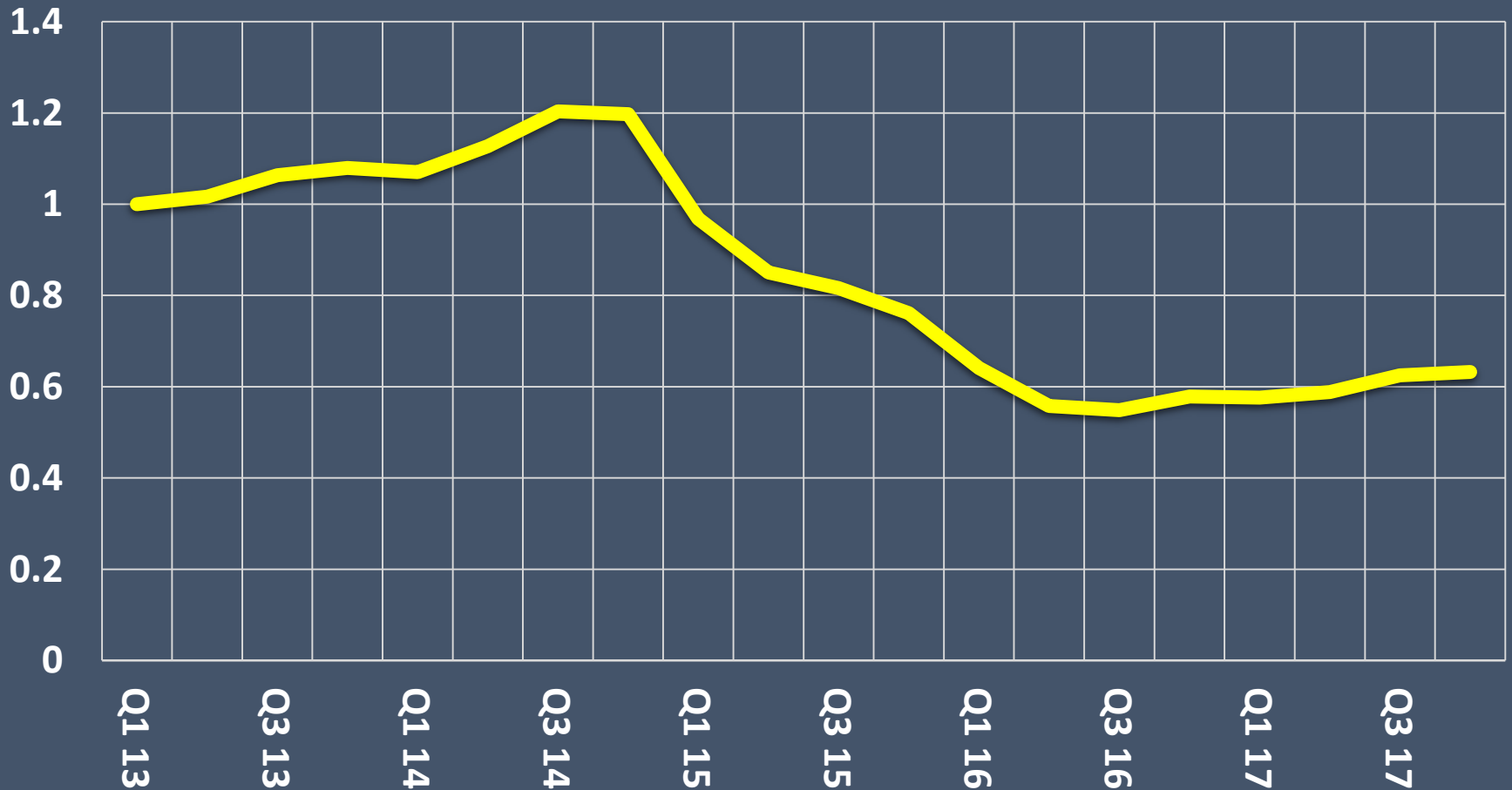


# Oilfield Companies



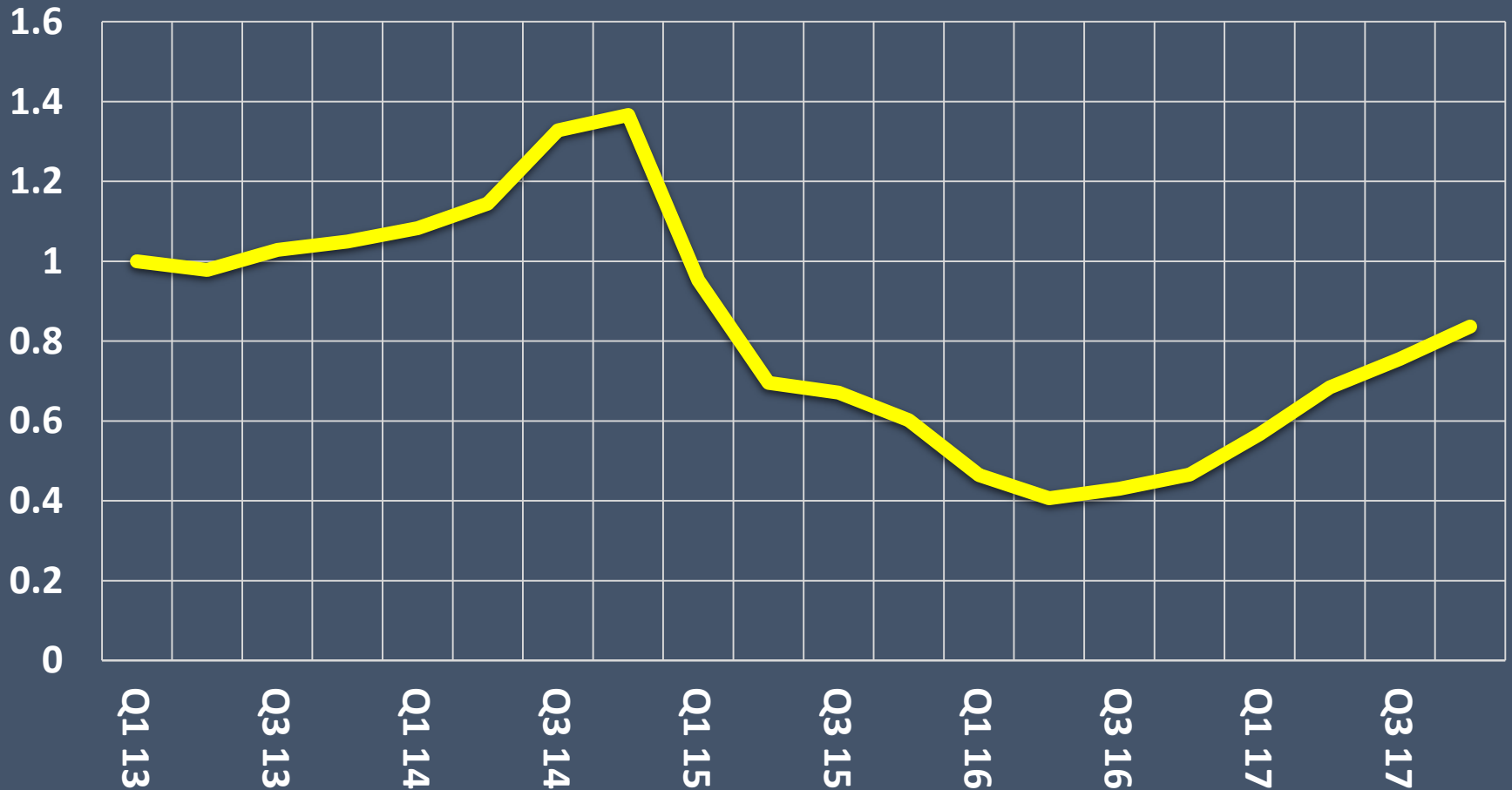
# Drilling Fluids

Spears Drilling Fluid Market Index



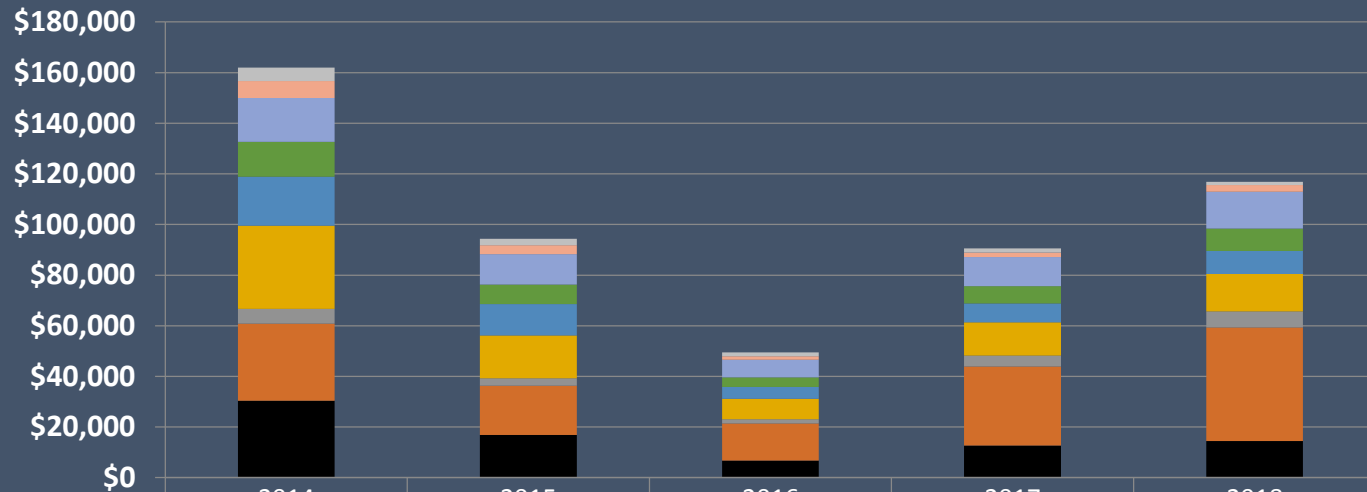
# Frac

## Spears Frac Market Index



# We measure regions

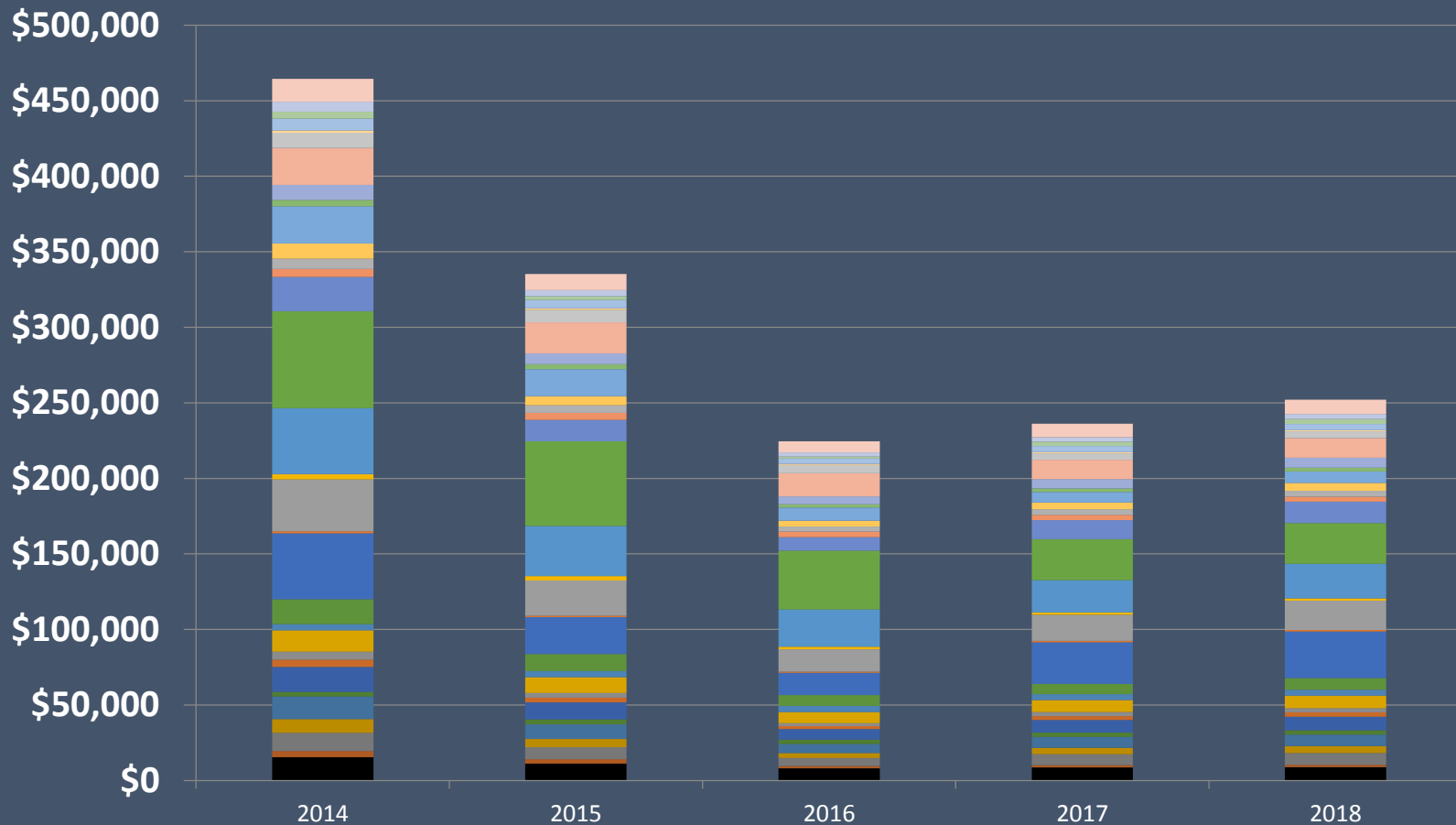
US Regional Oilfield Markets (Millions)



	2014	2015	2016	2017	2018
■ Gulf Coast	\$5,305	\$2,540	\$1,428	\$1,597	\$1,246
■ West Coast	\$6,644	\$3,546	\$1,488	\$1,801	\$2,701
■ Northeast	\$17,293	\$12,074	\$6,936	\$11,547	\$14,518
■ Other Rockies	\$13,774	\$7,706	\$3,753	\$6,857	\$8,890
■ Bakken	\$19,346	\$12,360	\$4,674	\$7,368	\$9,095
■ MidContinent	\$32,855	\$16,925	\$8,036	\$13,163	\$14,754
■ East Texas/North Louisiana	\$5,920	\$2,936	\$1,703	\$4,357	\$6,320
■ Permian Basin	\$30,375	\$19,466	\$14,600	\$31,132	\$44,830
■ South Texas/Eagle Ford	\$30,434	\$16,867	\$6,816	\$12,746	\$14,493

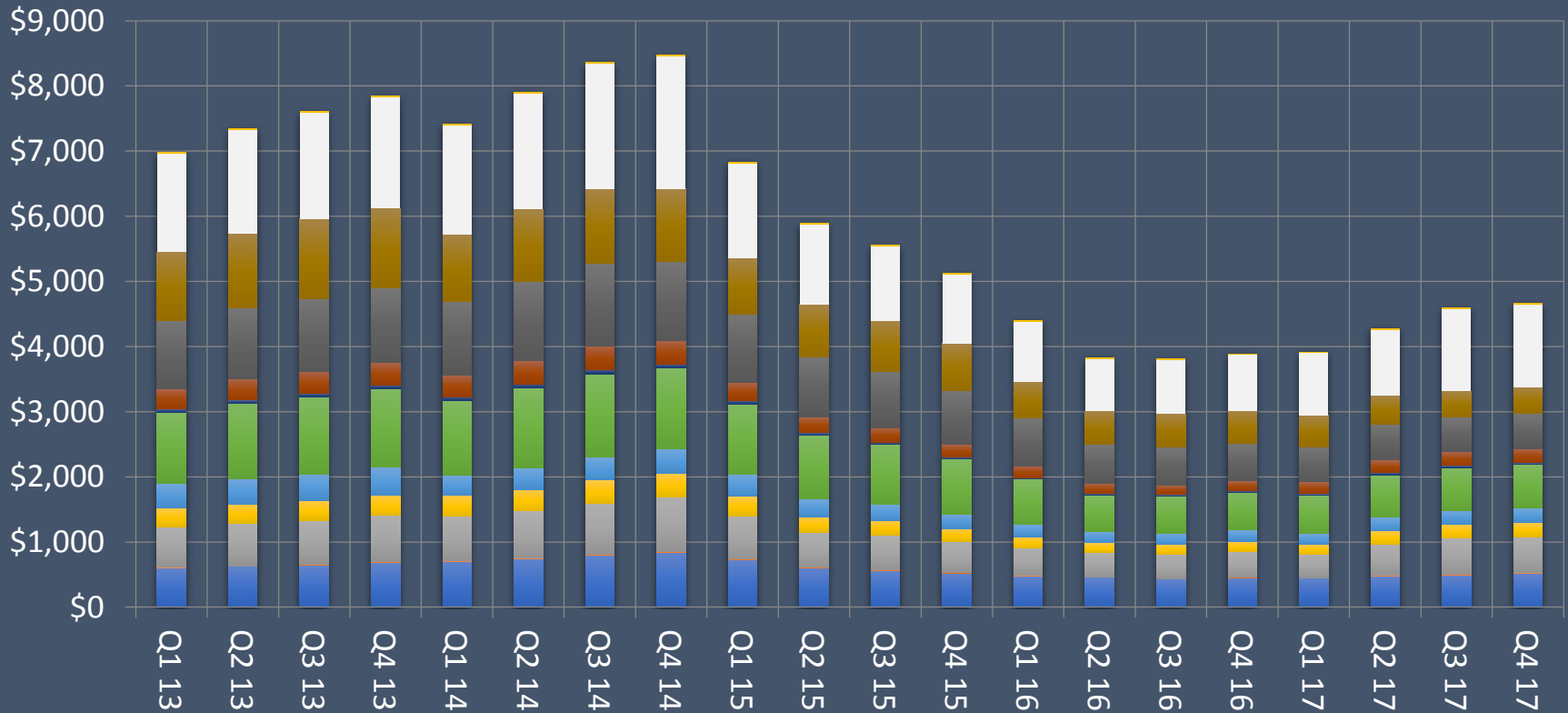
# We measure the globe

Global Oilfield Markets (Millions)



# We measure companies

SLB (Millions USD)



# The Drilldown Podcast

## Episode 48

### How Did 2017 Turn Out for 5 Markets and 5 Companies?

We compare 2017 with 2016 to look at the change in revenue in five equipment and service markets and discuss how this impacted revenue growth for five "bellwether" oilfield service companies.



# The Drilldown Video



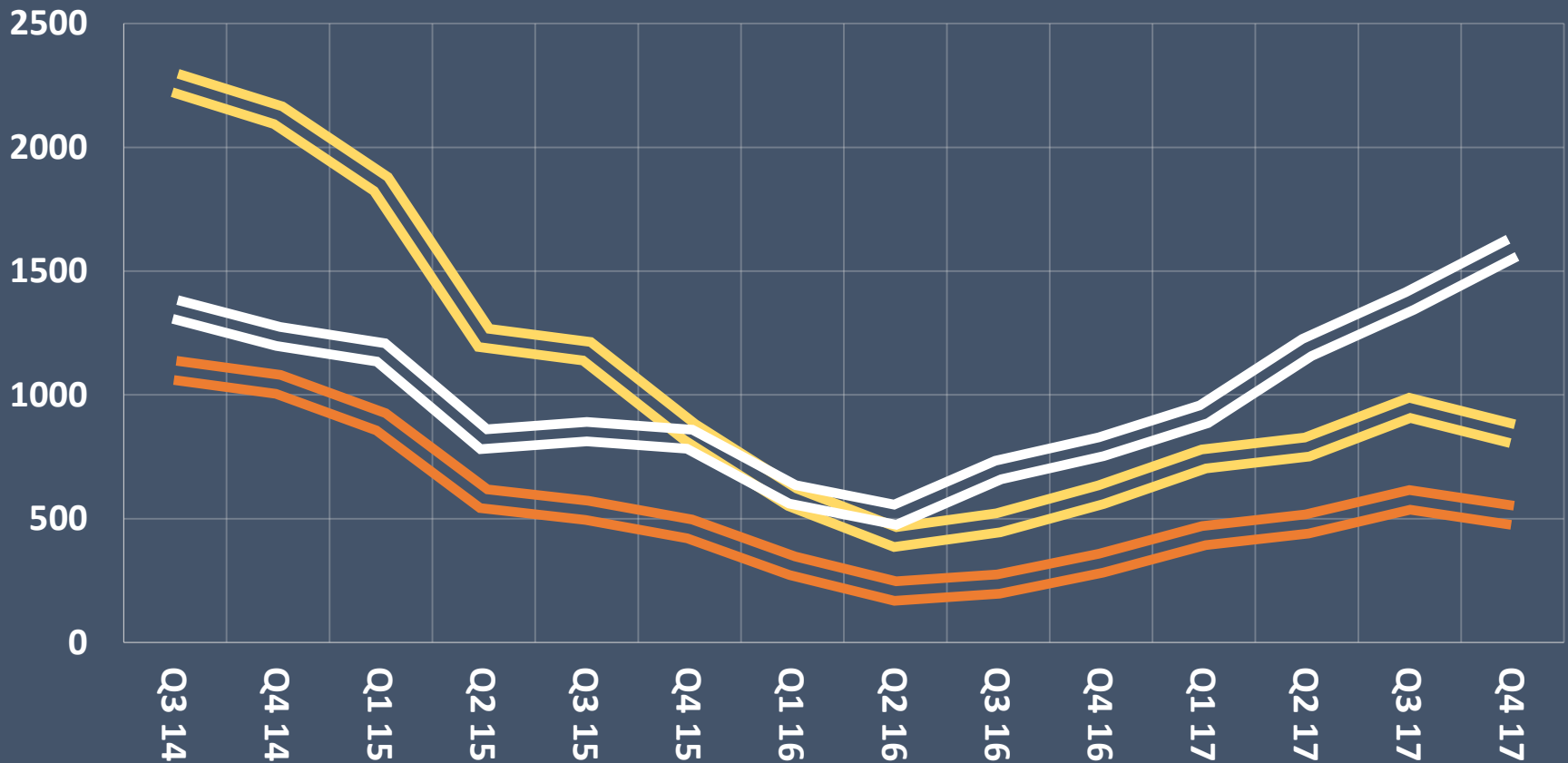
# Big Question

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Is frac  
good or bad?

# US Laterals

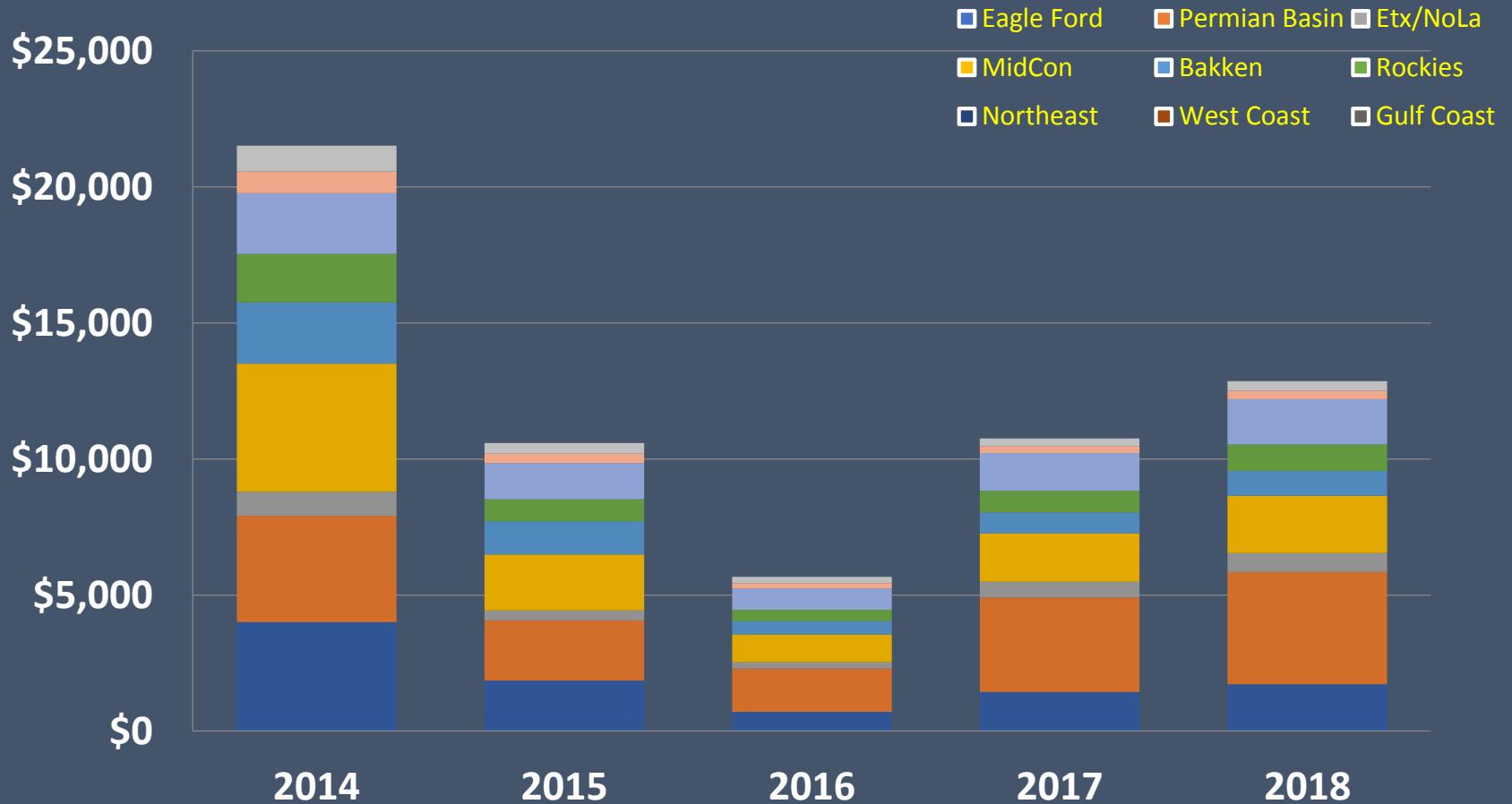
== <6000'    == 6000-8000    == Extended Reach



# US Land Drilling



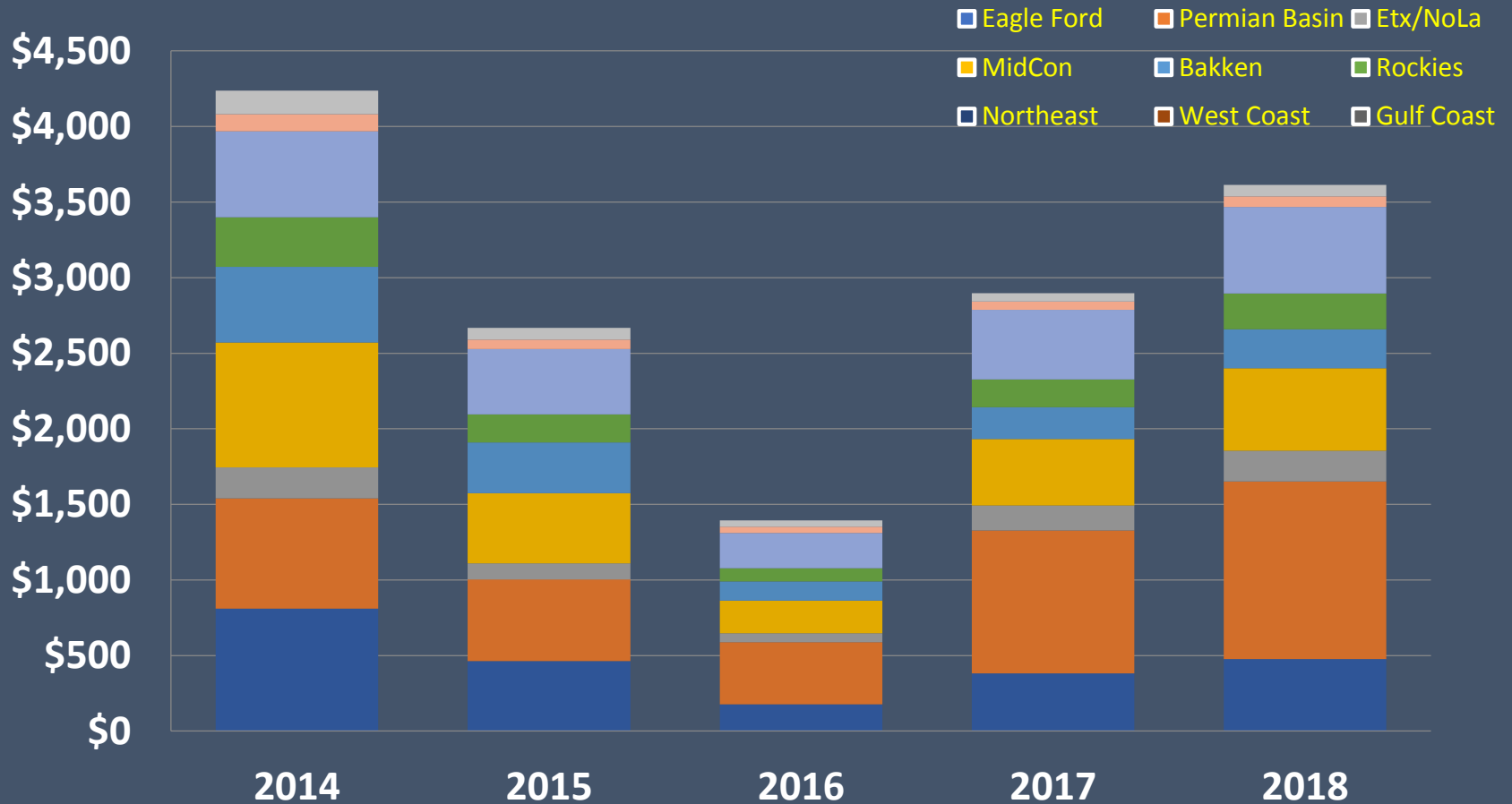
Millions



# US Directional



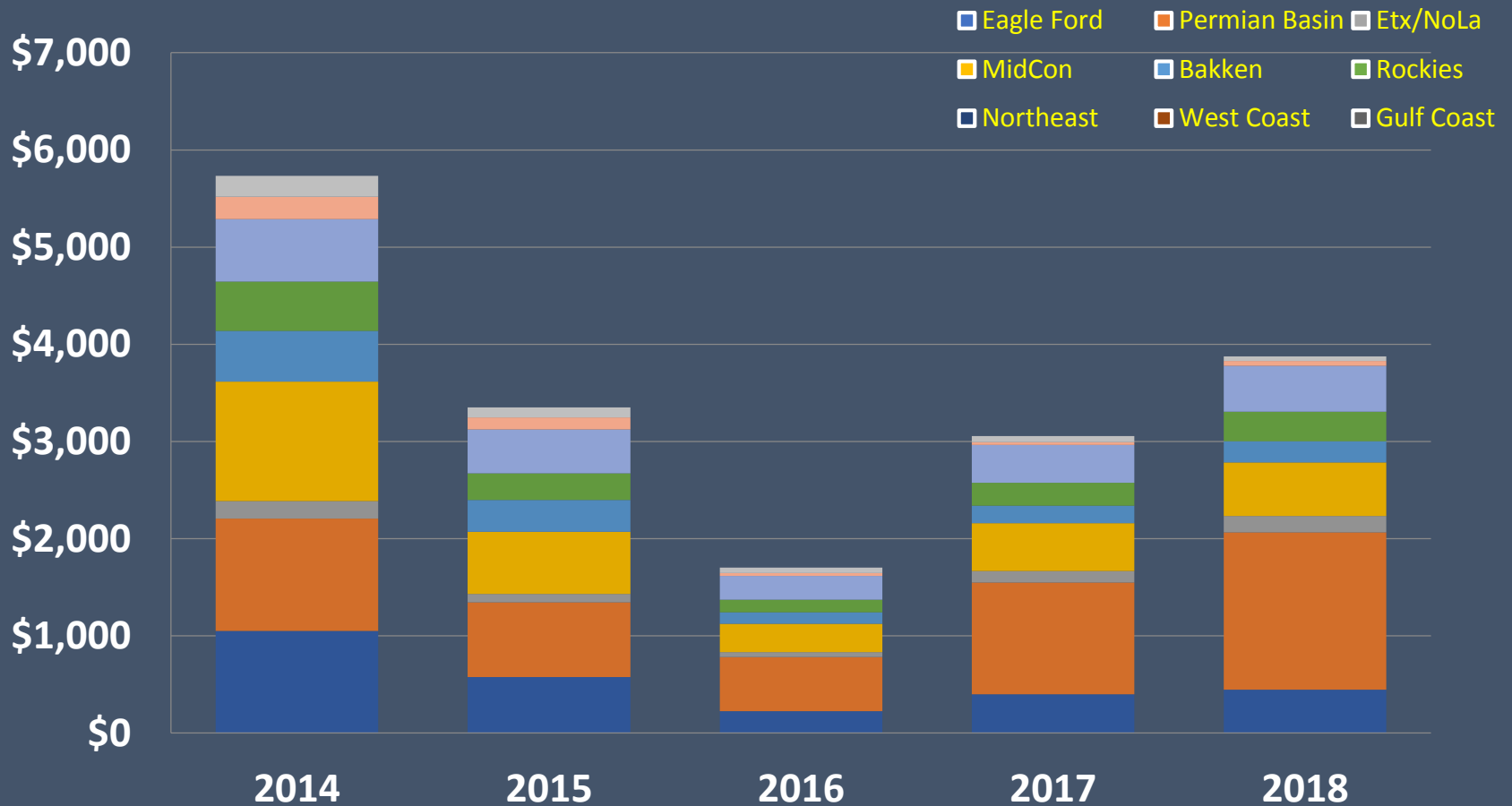
Millions



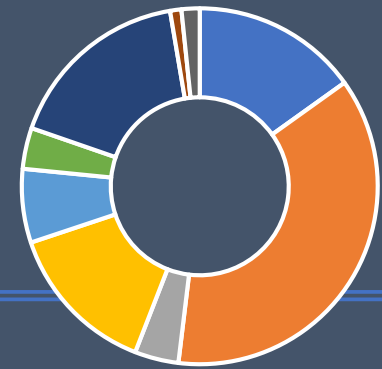
# US Drilling Fluid



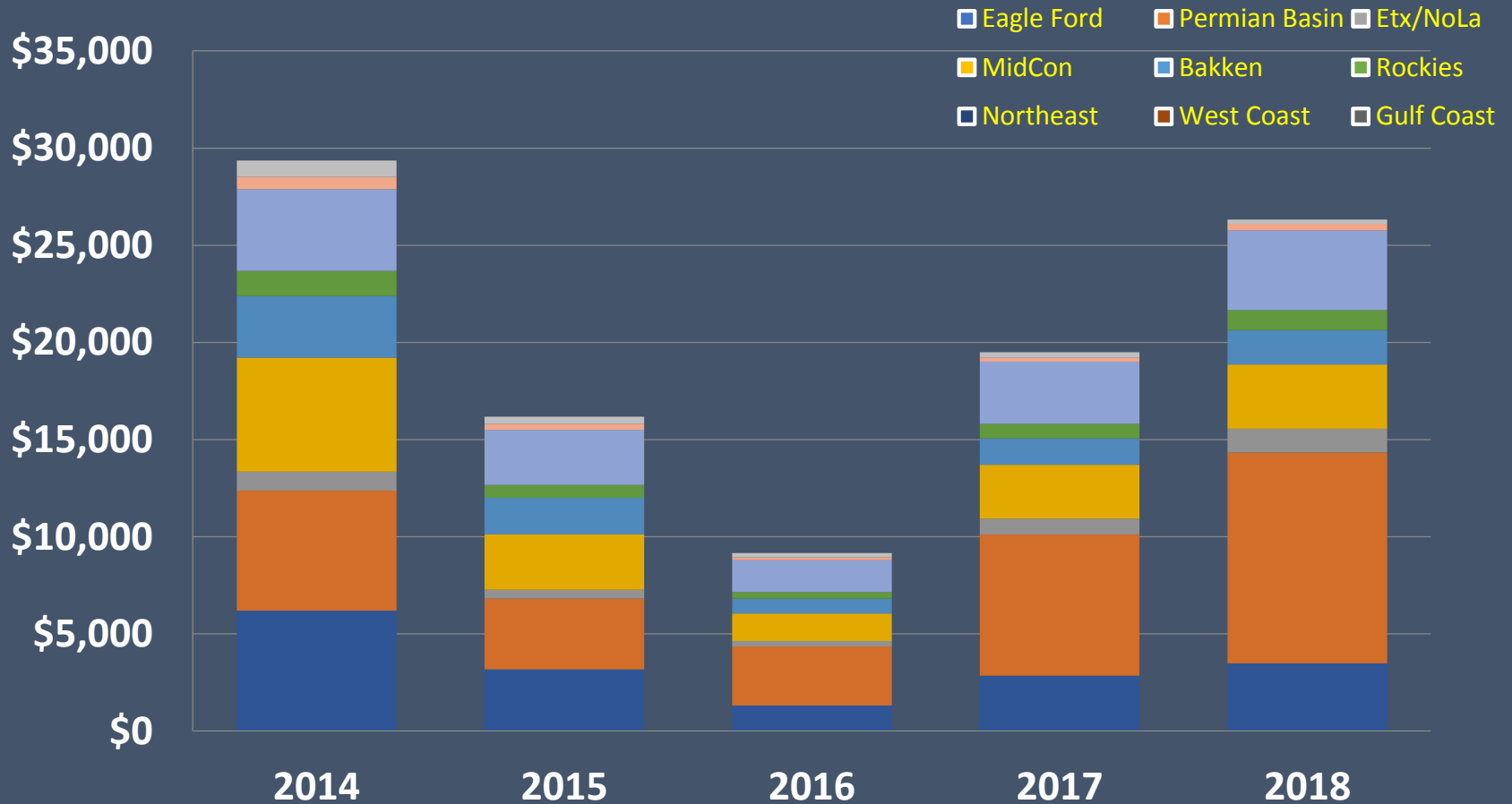
Millions



# US Frac

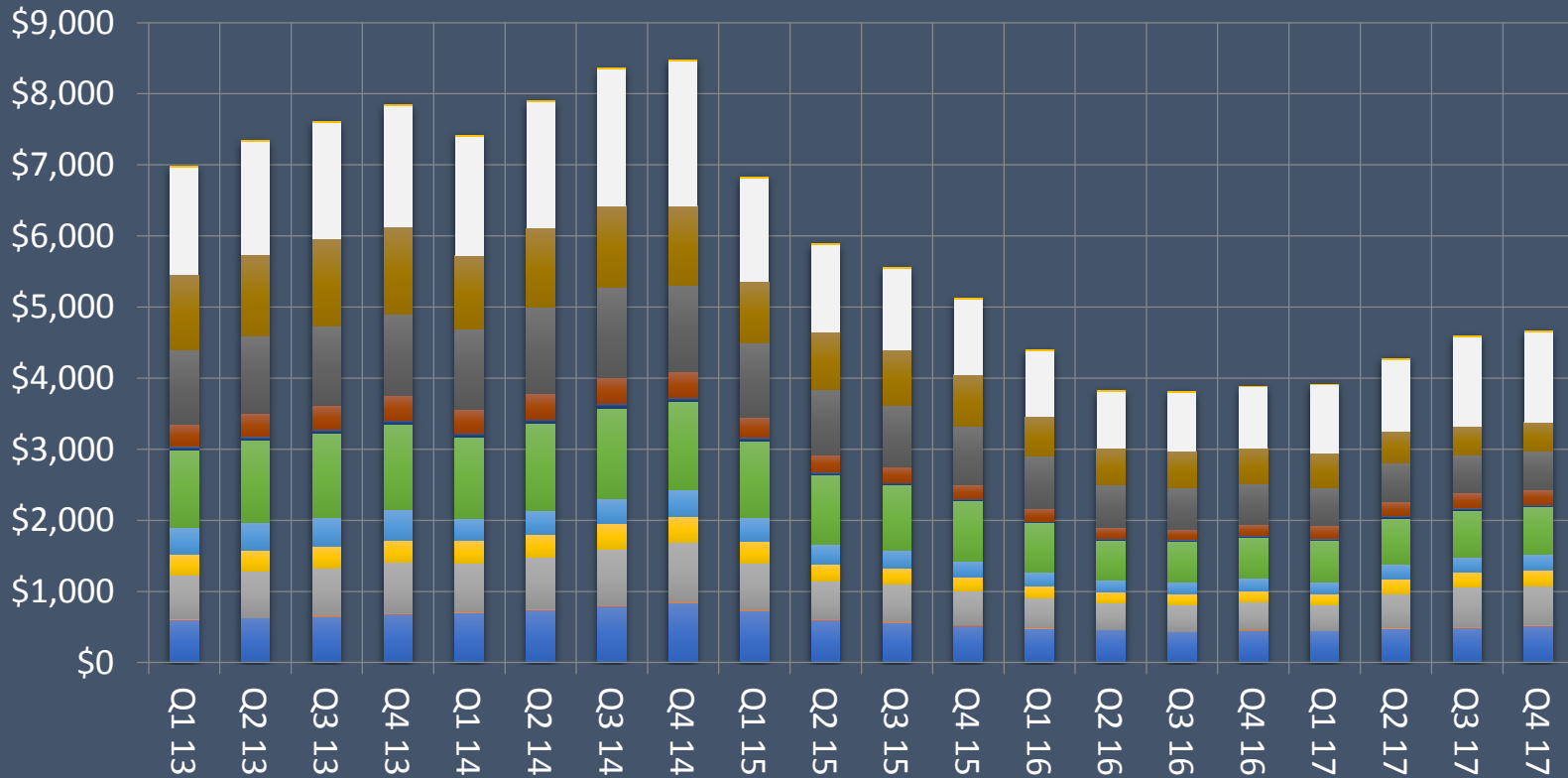


Millions



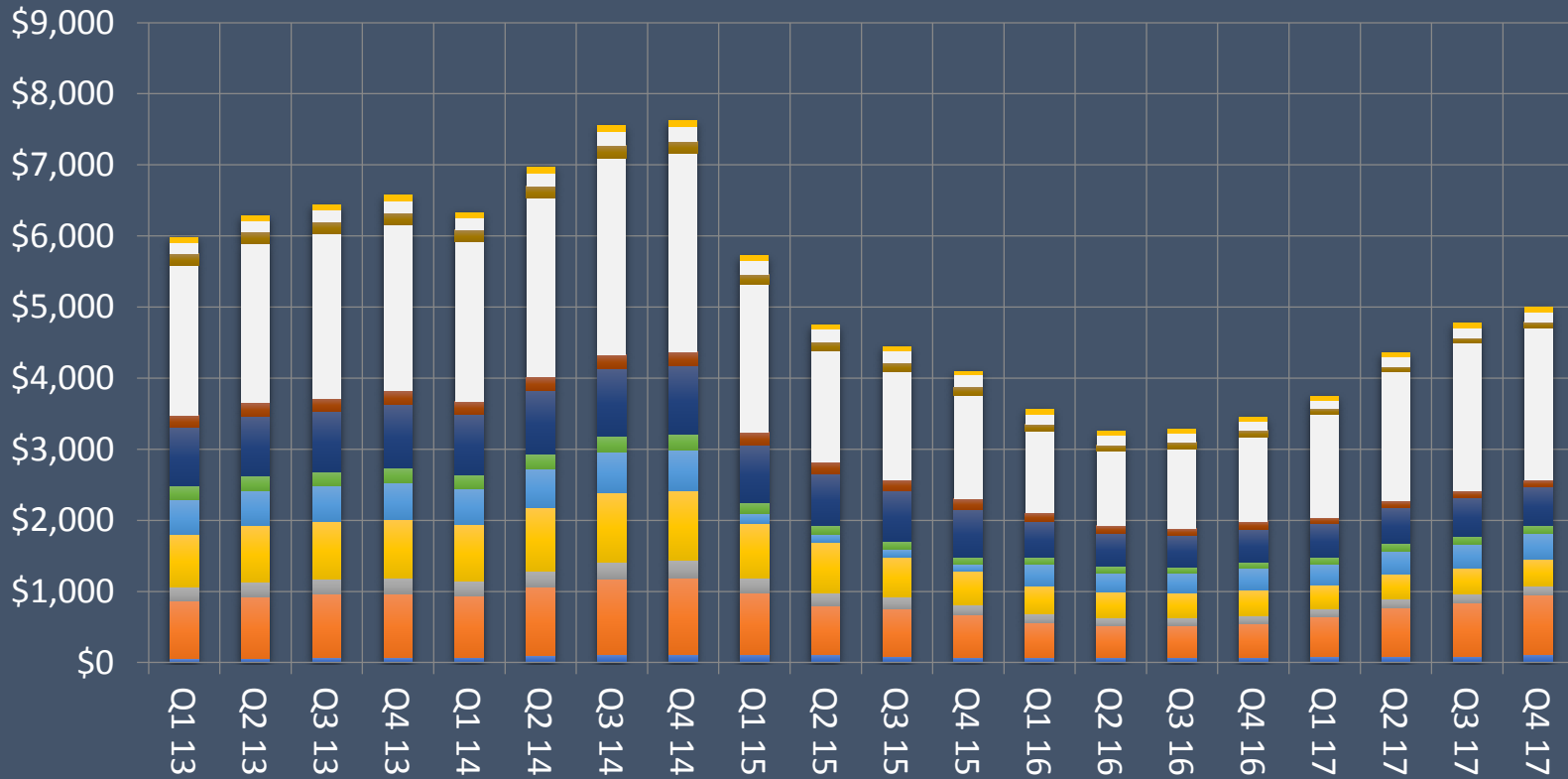
# Schlumberger

Millions USD



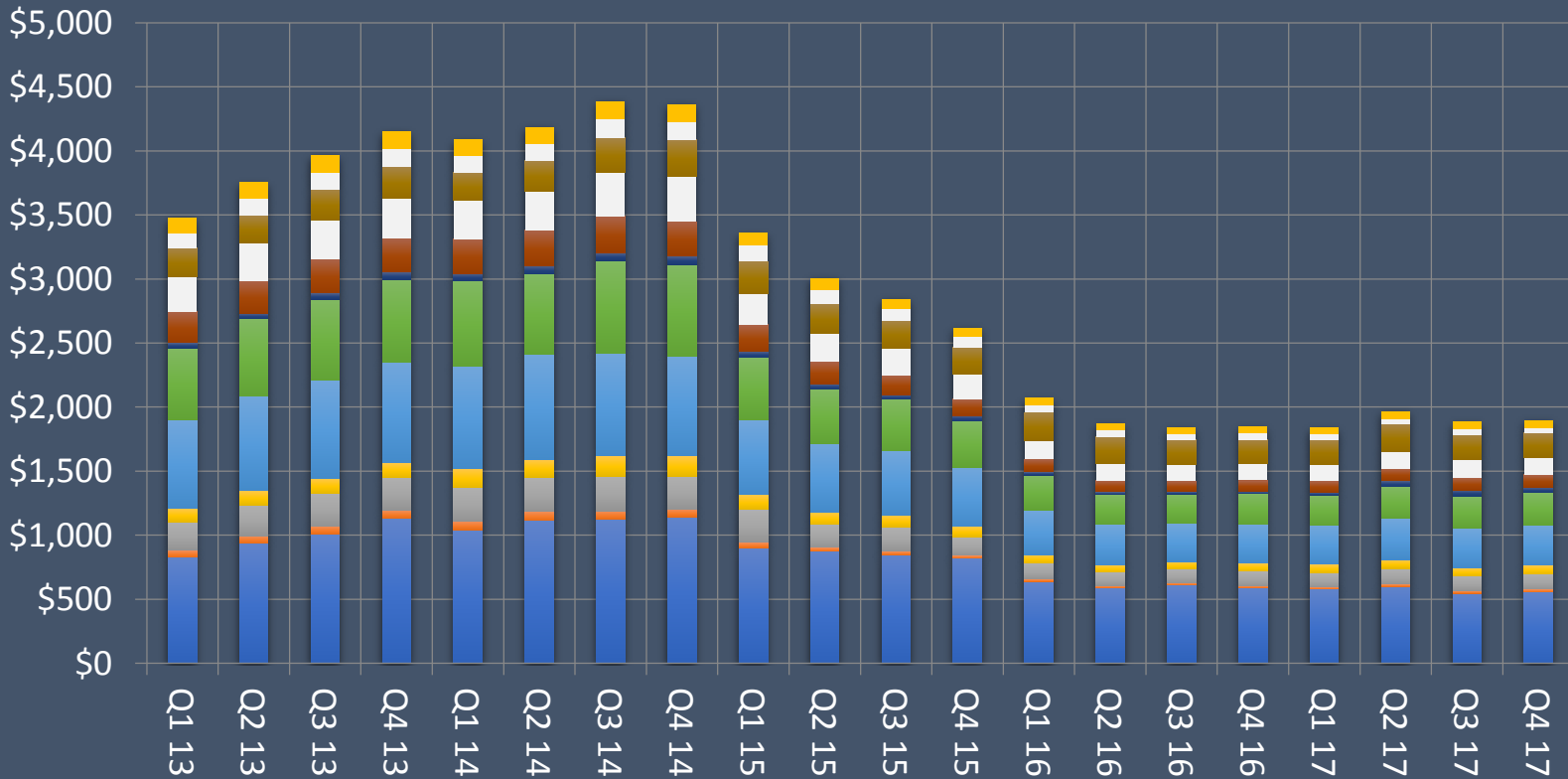
# Halliburton

Millions USD



# Baker Hughes, GE

Millions USD



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