

Publication Date: June 2017

## REPORT FEATURES

- Market forecasts and assumptions by basin (Excel).
- A 2017–2026 forecast of water management spending by supply, transport, treatment, storage, and disposal.
- Competitive analysis of water management and technology providers to meet the growing demand for water and water treatment in unconventional oil & gas.
- In-depth analysis of water supply and treatment solution drivers and bottlenecks by U.S. shale play.
- Profiles of leading water solutions providers serving the market, including pure-players and energy services companies.

Hydraulic fracturing's call for water management solutions has been kickstarted by a resurgence of drilling activity in 2017 and pressure on companies to rein in operating costs. Bluefield's basin-by-basin forecast for water management, which surpasses US\$136 billion over the next decade, highlights the emergence of new inputs that are influencing energy players' water and wastewater strategies and associated costs.

An inventory of more than 83,000 completed horizontal wells have required supply, transport, treatment, and disposal for more than 350 billion gallons of water since 2011. While significant in scale, water volumes per frack are rising steadily to as much as 12 million gallons per well in select basins.

Unquestionably, a sub-US\$50 per barrel of oil market environment has laid waste to hundreds of energy service companies, many of which are now in bankruptcy. The upside of this shakeout, however, has been a more concerted effort by surviving companies to focus on cost cutting and operational efficiencies, including a focus on alternative water supply and recycling in Pennsylvania, Texas. Bluefield profiles company strategies with value chain analysis, M&A and partnership impacts, regional focus, and technology strategies.

*Water for U.S. Hydraulic Fracturing Market: Competitive Strategies, Solutions, & Outlook, 2017-2026* is an in-depth analysis of an evolving landscape for water solutions and business strategies. This Market Insight has been developed to support companies addressing the US fracking market with detailed data and market trend analysis.

## Total Water Supply Demand vs. Flowback & Produced Water Volumes



## WHO SHOULD BUY THIS REPORT

- **Water technology firms** seeking insights into growth markets for produced water treatment.
- **Water services companies** in need of critical analysis hydraulic fracturing supply, treatment, storage & disposal trends.
- **Financial investors** evaluating market consolidation, M&A activity, and market conditions going investment forward.
- **Energy services firms** evaluating water service providers and their positions across the value chain.
- **Supply chain companies** requiring transparent analysis of the addressable market by geography.

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- DJ-Niobrara
- Eagle Ford
- Haynesville
- Marcellus
- Permian
- Utica

#### Analyzed & Forecasted

- Ardmore Woodford
- Arkoma Woodford
- Barnett
- Fayetteville
- Granite Wash
- Mississippian
- \*Activity in 27 U.S. States Forecasted

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- Rockwater Energy Solutions
- Select Energy Services

## SECTION 8 // Key Water Service Provider Profiles

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- Goodnight Midstream
- Antero Midstream Partners
- Aspen Midstream
- H2O Midstream
- NGL Energy Partners
- Noble Midstream Partners
- Rice Midstream Partners
- Solaris Midstream

\*Other Companies analyzed include,

- Antero
- Apache Resources
- Aquaterra
- Buckhorn Energy Services
- BuySWD
- Clearwater
- Crestwood Midstream Partners
- Devon Energy
- Digital H<sub>2</sub>O
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***Water for U.S. Hydraulic Fracturing Market: Competitive Strategies, Solutions, & Outlook, 2017-2026*** draws from Bluefield's U.S. & Canada Industrial Insight Service.

**Bluefield's annual Insight Service** provide clients with ongoing, in-depth analyses of evolving water and wastewater markets, company strategies, demand shifts, and the underlying drivers for greenfield opportunities.

Learn more at [www.bluefieldresearch.com](http://www.bluefieldresearch.com).

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## ***Water for U.S. Hydraulic Fracturing Market: Competitive Strategies, Solutions, & Outlook, 2017-2026***

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