

# Oilfield Equipment and Services: Navigating the Perfect Storm

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**ADI Analytics**

OIL & GAS • ENERGY • CHEMICALS  
CELEBRATING 10 YEARS

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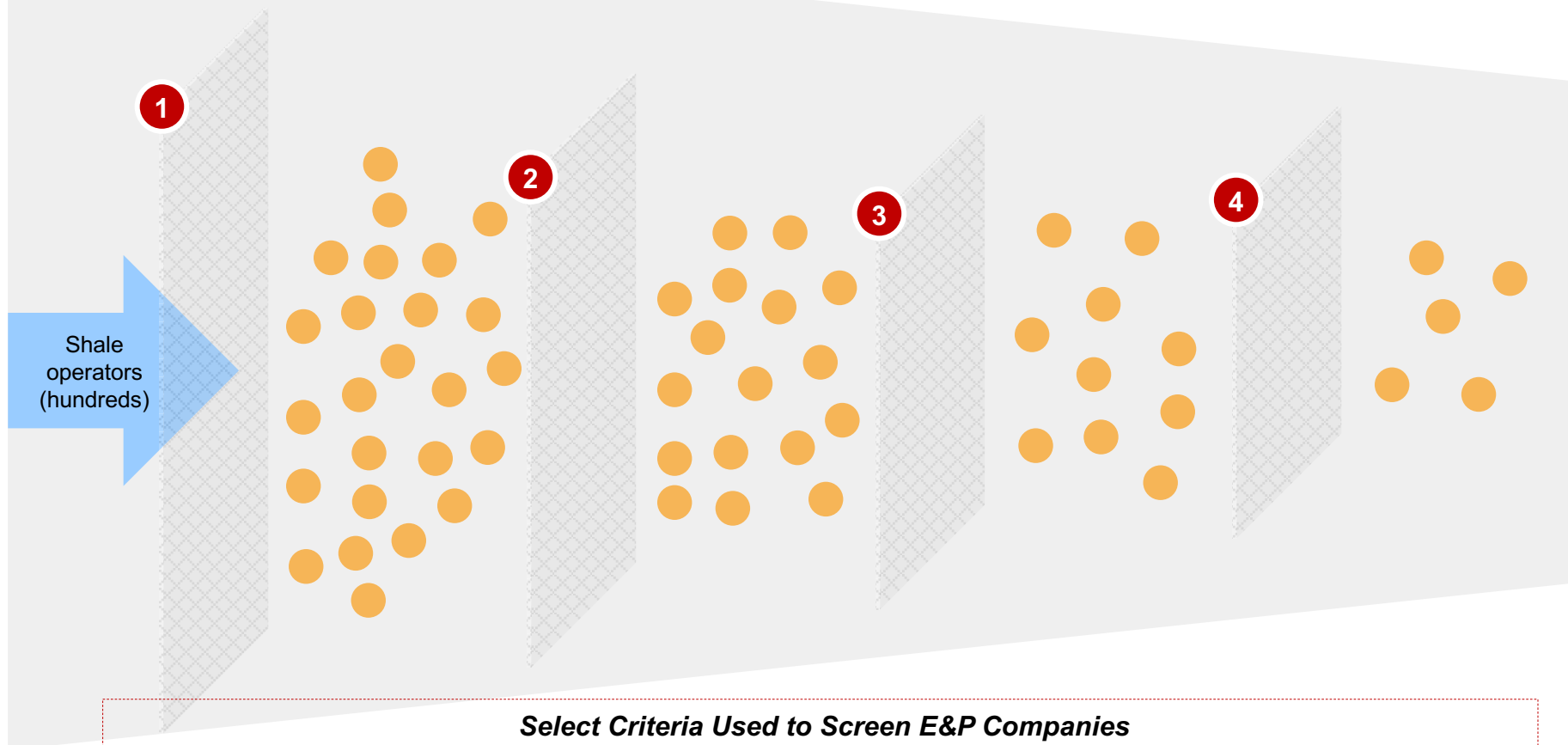
# ADI can help oilfield vendors assess shale operator landscape to focus their sales strategies through the perfect storm

Leverage ADI database of shale operators

Screen for shale operators likely to survive the downturn

Segment by play and fit with client offerings

Support business development with operator contacts



## Select Criteria Used to Screen E&P Companies

Production hedges and contracts

Attractive acreage and well inventories

Differentiated cost position

Openness to new technology

# ADI databases and tools can screen E&P operators across various metrics at the play level to develop insightful targets

## South Delaware Basin

Operator	Well inventory	Volume hedged
	1,398	64%
	813	48%
	612	43%
	755	56%
	561	41%
	518	45%
	459	53%
	463	46%
	288	61%
	168	43%

*Sanitized*

## Powder River Basin

Operator	Well inventory	Volume hedged
	1,247	34%
	1,110	31%
	1,060	23%
	794	16%
	890	21%
	475	15%
	232	33%
	187	26%
	157	21%
	68	18%

*Sanitized*

# ADI Analytics is a consulting firm serving oil and gas, energy, and chemical companies with passion, expertise, and rigor



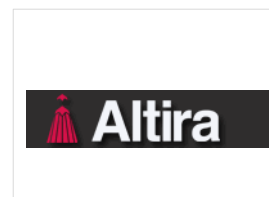
# Our value proposition—expertise, analytics, and client-centric owner’s mindset—is designed to help clients succeed



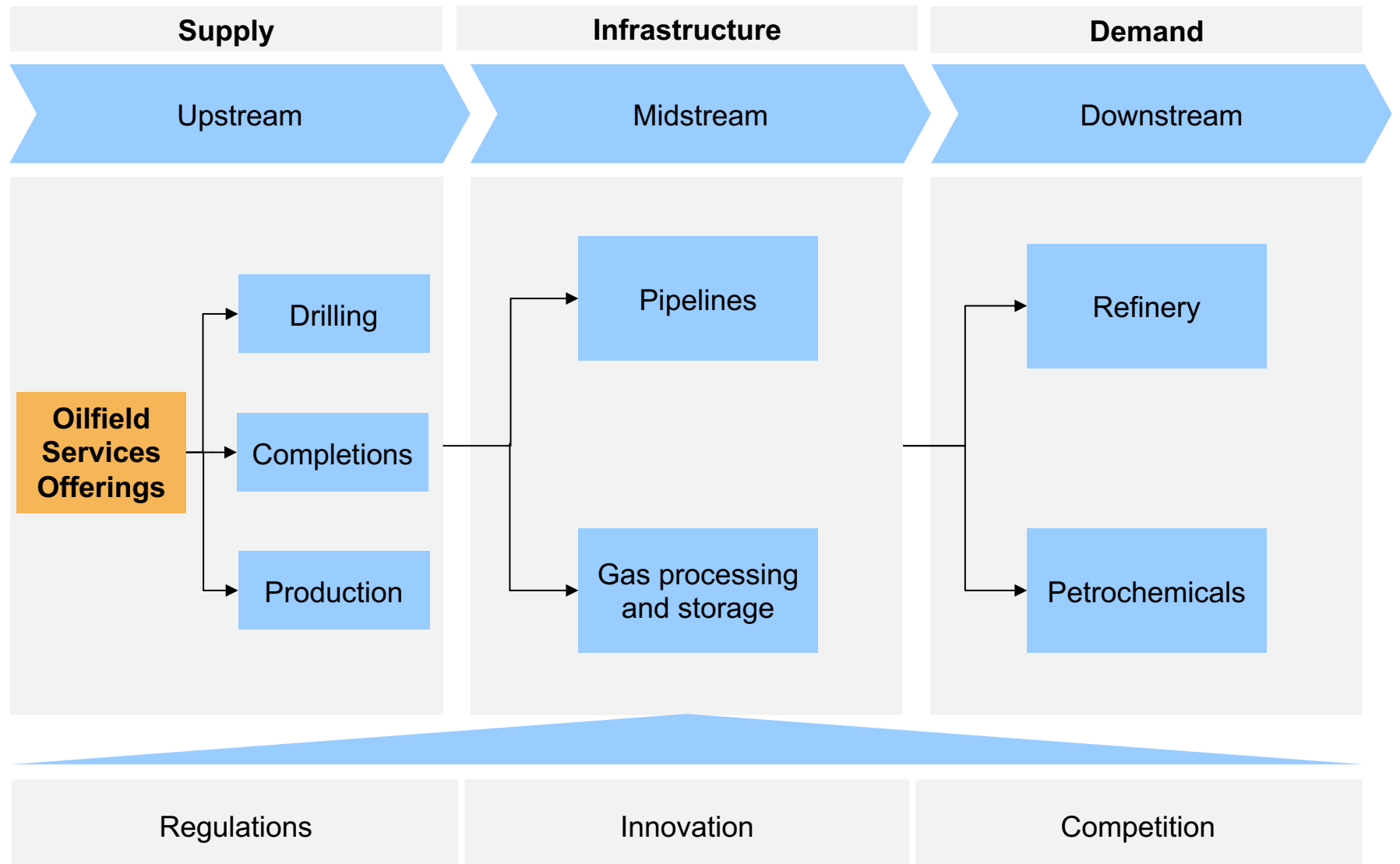
# ADI has advised majors, independents, industrials, investors, and early-stage firms in oil and gas, energy, and chemicals



# Further, we have helped many oilfield equipment and service leaders with market research and management consulting



# ADI's oilfield service offerings has emerged from its deep understanding of the entire oil & gas value chain and ...





# ... Rich experience with equipment and services across oilfield value chain including drilling, completions, and production

Drilling	Completions	Production
<ul style="list-style-type: none"><li>▪ Geophysical equipment and services</li><li>▪ Wireless seismic</li><li>▪ Subsea services</li><li>▪ Wireline services</li><li>▪ Coiled tubing</li><li>▪ Directional drilling services</li><li>▪ Drilling fluid</li><li>▪ Well site chemical injection pumps</li><li>▪ Bottom hole assembly</li><li>▪ Drilling rigs and crews</li><li>▪ Floating production services</li><li>▪ Gas to wire</li><li>▪ Well automation products</li><li>▪ Digital oilfield software</li><li>▪ Offshore helicopters</li><li>▪ Remotely Operated Vehicle (ROV)</li><li>▪ Floating LNG (FLNG)</li></ul>	<ul style="list-style-type: none"><li>▪ Shape charge liners</li><li>▪ Casing</li><li>▪ Casing and tubing coatings</li><li>▪ Pressure pumping</li><li>▪ Sand management</li><li>▪ Energized fluids for water-less fracking</li><li>▪ Completions tool and equipment</li><li>▪ Completion fluids</li><li>▪ Trucking</li><li>▪ Wastewater management</li><li>▪ Acidizing market</li></ul>	<ul style="list-style-type: none"><li>▪ Production tubing</li><li>▪ Packers</li><li>▪ Blowout Preventers</li><li>▪ Production chemicals</li><li>▪ Equipment rental</li><li>▪ Pumps</li><li>▪ Artificial Lift</li><li>▪ Compression equipment</li><li>▪ Turbines</li><li>▪ Oilfield tanks</li><li>▪ Line and Process Heaters</li><li>▪ Heater Treaters</li><li>▪ Heat Exchangers</li><li>▪ Separators</li><li>▪ Dehydrators</li><li>▪ Gas processing</li><li>▪ Production maintenance</li><li>▪ Vapor Recovery Unit (VRU)</li><li>▪ Enhanced oil recovery</li></ul>

# Finally, ADI has also helped oilfield equipment and service companies through several custom projects and studies

1	<b>Market sizing and research</b>	<ul style="list-style-type: none"><li>▪ Global oilfield services market size with 30+ segments for a <u>venture capital firm</u></li><li>▪ Assessment of the Permian gas lift market size for a <u>private equity firm</u></li></ul>
2	<b>Voice of customer</b>	<ul style="list-style-type: none"><li>▪ VOC research on new analytical tool in well logging / fracking for a <u>technology start-up</u></li><li>▪ Surveyed 50 experts on market drivers, applications, and margins for an <u>oilfield OEM</u></li></ul>
3	<b>Technology assessment</b>	<ul style="list-style-type: none"><li>▪ Equipment fueling with CNG and LNG in 12 shale plays for <u>oilfield service company</u></li><li>▪ Assessment of wet-gas and multi-phase compression technologies for a <u>oil &amp; gas major</u></li></ul>
4	<b>Competitive intelligence</b>	<ul style="list-style-type: none"><li>▪ Competitor analysis in Marcellus, Permian, Eagle Ford, and Bakken for <u>water treatment</u></li><li>▪ Competitive dynamics for high pressure pumps in offshore operations for <u>pump OEM</u></li></ul>
5	<b>Go-to market and pricing</b>	<ul style="list-style-type: none"><li>▪ Last mile logistics for frac sites in shale plays for a <u>commodity supplier</u></li><li>▪ Drive adoption of new product by analyzing purchase time and prices for <u>tech start-up</u></li></ul>
6	<b>Growth and M&amp;A strategy</b>	<ul style="list-style-type: none"><li>▪ Market assessment for refracturing in unconventional wells for <u>major investment firm</u></li><li>▪ Diversification opportunity for <u>private investor</u> active in injection services in the Permian</li></ul>
7	<b>Transaction due diligence</b>	<ul style="list-style-type: none"><li>▪ Due diligence for a novel frac plug drill-out technology for a <u>private equity firm</u></li><li>▪ Assessment of a visualization software company for a <u>venture capital firm</u></li></ul>
8	<b>Performance benchmarking</b>	<ul style="list-style-type: none"><li>▪ Well costs benchmarking in 4 major U.S. shale plays for a <u>private investor</u></li><li>▪ Benchmarked shale plays on reserves, production, and infrastructure for <u>oilfield major</u></li></ul>



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