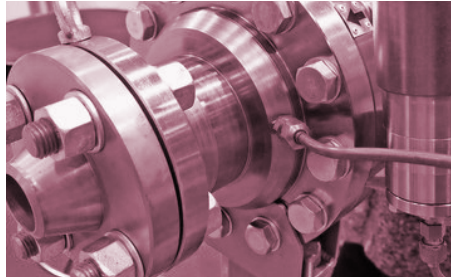
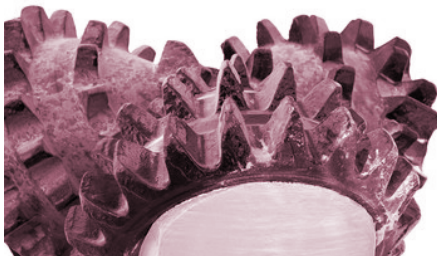
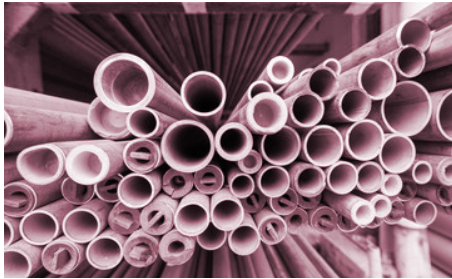


Oilfield Products Suppliers

Customer Satisfaction



RATINGS & ANALYSIS REPORT

ENERGYPOINT
RESEARCH

E&P companies, drilling contractors and upstream professionals worldwide rated suppliers in EnergyPoint's most recent Oilfield Products Customer Satisfaction Survey. These respondents have significant and industry-wide impact on the selection and utilization of oilfield products suppliers globally. In aggregate, results in this closely watched report offer insightful and impactful information regarding the current state of customer satisfaction in the global oilfield products sector.

EnergyPoint conducts the only truly independent surveys in the industry that reveal the comprehensive and ongoing opinions of purchasing decision-makers, influencers and users concerning major industry suppliers. This particular report offers highly relevant detail, timely information, and unique analysis regarding how customers rate major oilfield products suppliers across 60+ attributes, product categories, and well types. It is an acknowledged "must have" for products suppliers seeking to understand how their own, and their competitors', offerings align with the needs of customers across the industry.

Incorporating results from thousands of in-depth evaluations by qualified respondents at E&P companies, drilling contractors and upstream consultants worldwide, the report provides an comprehensive framework for identifying and tracking the relative strengths and weaknesses of individual product suppliers.

VALUE OF THIS REPORT

- Understand the current state of customer satisfaction in the global oilfield products market
- Obtain detailed information on individual oilfield products suppliers' customer ratings and rankings
- Identify and track strengths and weaknesses among today's major products suppliers
- Know the key satisfaction drivers for customers of oilfield products suppliers

PROFILE OF SURVEY RESPONDENTS

All indicated having "significant experience" in selecting or utilizing oilfield products suppliers.

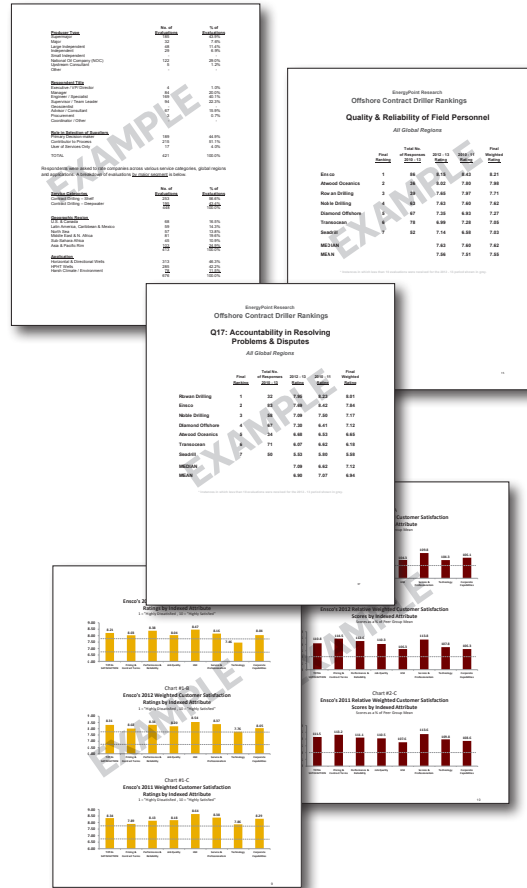
Over 90% indicated having primary decision-making responsibility or involvement in the supplier-selection process.

More than 85% indicated having 10+ years of upstream experience; over 70% indicated 20+ years of experience.

Titles and functions include:

- Executive/VP/Director
- Manager
- Engineer/Specialist
- Supervisor/Team Leader
- Advisor/Consultant
- Procurement/SCM
- Coordinator/other

Participation from a range of customer types, including: U.S. and international supermajors, majors, independents, NOCs, onshore and offshore drilling contractors, and upstream consultants.



Some of the Attributes Rated

- Overall satisfaction
- On-time and as-ordered delivery
- Willingness to recommend
- Adequacy of inventory held
- Prices and contract terms vs. competitors
- Digital Oilfield Data Capabilities
- Prices paid vs. quality received (value)
- Quality of sales personnel
- Performance to specifications and expectations
- Quality of technical personnel
- Quality control
- Quality of field personnel
- HSE features and performance
- Accountability after sale
- Degree to which products and upgrades are value-adding
- Replacement parts and refurbishments
- Technical soundness and sophistication
- Depth and breadth of offerings
- Ease and cost of installation and maintenance
- Quality of performance data and documentation
- + Others

36 Oilfield Products Suppliers Rated

- Aker Solutions
- Newpark Resources
- Archer
- Nippon Steel
- Baker Hughes
- NOV
- Cactus Wellhead
- Oceaneering Int'l
- Caterpillar
- Oil States Int'l
- ChampionX
- Pason Systems
- Core Lab
- Schlumberger
- Derrick Corp
- Subsea 7
- Drill-Quip
- TAM Int'l
- Expro
- TechnipFMC
- Flowserve
- Tenaris
- Forum Energy Technologies
- Tetra Technologies
- Frank's Int'l
- U.S. Steel
- GD Energy
- Ulterra
- Halliburton
- Vallourec
- HMH
- Varel
- JFE Steel
- Weatherford Int'l
- Nabors Industries
- Worldwide Oilfield Machine

DETAILED RATINGS

EnergyPoint's Oilfield Products Suppliers Report is designed for suppliers and other industry participants and stakeholders interested in understanding, in specific terms, how major oilfield products suppliers rate across 60+ attributes, categories, regions and well types.

The detailed ratings portion of the 120+ page report contains data, tables, graphs, background and other specifics from EnergyPoint's Oilfield Products Survey. Contents include 1-to-10 point ratings, top-to-bottom rankings, evaluation counts, category means and medians, for multiple attributes, categories, regions, well types and applications. The report's methodologies are those used to determine official category winners for EnergyPoint's annual Customer Satisfaction Awards.



DETAILED ANALYSIS

The detailed analysis portion of the report provides strategic analysis and recommendations related to customer satisfaction in the oilfield products sector. Considered the "roadmap" by many in the industry, the report provides insights as to why customer satisfaction matters, how suppliers can better manage their performance, and understand which organizational resources can be most effectively allocated to optimize results.

The report also contains actionable analyses, and identifies the importance customers of products suppliers place on various attributes, including: pricing, performance and reliability engineering and design, availability and delivery, post-sale support, digital oilfield, corporate resources, etc. Customized reports for individual suppliers or segments are available upon request.

ANALYZE RATINGS ACROSS MULTIPLE SEGMENTS

Rig-Related

- Surface BOPs
- Top Drives
- Tubular Handling Equipment
- Solids Control Equipment
- Rig Controls & Instrumentation
- Engines
- Communication & Networking

Downhole Drilling

- Drill Bits
- Downhole Motors
- Rotary Steerable Systems
- Downhole Cementing Equipment
- Fishing Tools

Production Equipment

- Surface Wellheads & Trees
- Flow Control Equipment

Downhole Completion

- Perforating Guns
- Completion Packers
- Sand Control Equipment
- Artificial Lift
- Intelligent Sensors & Controls

Fluids, Chemicals & Proppants

- Drilling Fluids
- Cements & Slurries
- Completion Fluids
- Proppants
- Production Chemicals

Tubular Goods

- Drill Pipe
- Casing
- Production Tubing
- Connections, Couplings & Collars

Subsea

- BOPs
- Wellheads & Trees
- Risers & Flexible Joints
- Umbilicals & Control Systems
- Manifolds, Flowlines & Connectors

- ROVs

Well Types

- Land Wells
- Shelf Wells
- Deepwater Wells

Applications

- Horizontal & Directional Wells
- High-pressure/High-temperature Wells
- Harsh-climate/Harsh-environment Wells

Shouldn't you and your organization be aware of the information industry participants have provided through EnergyPoint's unmatched independent research?

Knowing what is important to customers can help both long-term decision-making and resource allocation. Accordingly, the report includes the following:

- Ratings and rankings of oilfield products suppliers across 60+ attributes, product categories, and well types.
- Identification of satisfaction drivers as determined by statistical analysis performed by EnergyPoint.
- Recommendations for resource allocation strategies for enhancing, optimizing and maximizing customer satisfaction over the long term.
- Other actionable analyses and recommendations to assist suppliers looking to develop superior customer satisfaction strategies and solutions.

The report provides the information, insights and analyses needed to support important decisions addressing customer needs. It is simply the best information available for knowing and understanding the factors that are important to customers of oilfield products suppliers.

"If you don't measure it, you can't manage it."

ENERGYPOINT RESEARCH

OUR FOCUS

EnergyPoint Research provides independent research regarding the global energy industry's satisfaction with the products and services it purchases and utilizes. We offer industry professionals and their employers opportunities to provide, gather and access comprehensive ratings of industry suppliers through independent and objective evaluation processes. In return for participating in our surveys, respondents and their employers receive complimentary survey results in the form of EnergyPoint's reports and updates.

MARKETPARTNERS® PROGRAM

Through its MarketPartners® Program, EnergyPoint regularly surveys significant cross-sections of experienced industry participants involved in the selection and utilization of various products and services. Survey participants range from decision-makers and managers at some of the world's largest energy companies to operational and field personnel at independents and regionals. For more information regarding the MarketPartners® Program, go to www.energypointresearch.com.

CONFIDENTIALITY

EnergyPoint takes care to maintain confidentiality and anonymity related to the data it collects and publishes. While respondent demographics are included in our various published reports and data sets, the names of survey respondents and their employers are not divulged.

INDUSTRY RECOGNITION

EnergyPoint and its customer satisfaction data have been cited by many leading business and industry resources including:

- *Wall Street Journal*
- *New York Times*
- *Barrons*
- *Fortune*
- *The Sunday Times*
- *Harts E&P*
- *Oil & Gas Journal*
- *Oil and Gas Investor*

SURVEYS & REPORTS

To help ensure that our research is both relevant and timely, EnergyPoint's industry-leading surveys focus on the topics industry participants tell us are most important. We design our surveys to measure satisfaction by:

- Organizational attribute
- Performance attribute
- Customer and provider type
- Respondent title
- Product and service category
- Geographic region
- Application type

We provide survey results in three primary formats:

EnergyPoint's Online Portal is the most detailed and comprehensive tool available for understanding customer satisfaction in the global energy industry. It allows subscribers to generate, view, analyze and download via the web results from EnergyPoint's independent surveys.

Detailed Ratings & Analysis Reports offer relevant detail, timely information and insightful analysis regarding how customers rate major industry suppliers across 80+ attributes, categories, regions and segments. These reports provide unprecedented frameworks for identifying and tracking the relative strengths and weaknesses of more than 100 companies.

EnergyPoint Summaries & Updates

are complimentary survey results and commentary available to subscribers, participants and their employers. These popular pieces have become a standard in the energy industry, providing insight and perspective regarding the performance of a range of suppliers and industry segments.

MANAGEMENT

Doug Sheridan is Managing Director and founder of EnergyPoint Research, Inc. Prior to starting the firm in 2003, Sheridan held commercial and corporate positions in the U.S. midstream segment. He has been active in a number of industry associations, including the National Petroleum Council, and is regularly sourced for his analysis and opinions concerning the oil and gas industry, particularly in the area of customer satisfaction. Sheridan holds a B.A. from Vanderbilt University and an M.B.A. from the University of Michigan's Ross School of Business. He lives in and is a native of Houston, Texas.

CATEGORY WINNER RECOGNITION

The EnergyPoint Research Seal of Excellence™ and Customer Satisfaction Award™ is available annually to those suppliers receiving the top rating in specific survey categories. Backed by EnergyPoint's acknowledged objectivity and expertise, the Seal of Excellence is the recognized symbol of performance in the global energy industry. Visit the EnergyPoint Research website at www.energypointresearch.com for a current list of companies eligible for recognition.

Contact us at info@energypointresearch.com or call us at **+1.713.529.9450**.

To learn more about EnergyPoint and our independent research, visit the company's website at www.energypointresearch.com

