2018 Executive Address

PESA Chairman Dan Domeracki shares insights into his success

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Membership in PESA provides more than networking opportunities. Find out how PESA supports Members from where they are.

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Chairman’s Letter

PESA Members,

This year marks the 85th anniversary of PESA, and I can say with absolute certainty the Association has positioned itself as the premier voice for the oilfield services and equipment sector. There just isn’t anything like PESA elsewhere in the industry. The collaboration of the best and brightest minds in the service sector has created a vibrant organization vital to the member companies, our customers and communities where we each operate.

What began as a partnership between the U.S. government and the oil services and equipment organizations has bloomed over the years into a dynamic force that prizes the best our industry provides. PESA’s mission of advocating for and supporting this sector’s achievements in job creation, technological innovation and economic stability are showcased throughout the year with the many workforce training programs, benchmarking projects, contributions to STEM education, and advocating for fair and practical trade practices, balanced regulatory measures, and increased access.

At a time of great changes in the industry, it is more important than ever for Member Companies to be engaged and to be aware of all the activities PESA executes to support our sector. PESA Committees are one way that Members can get involved. Committees do everything from crafting policy responses to federal agencies on behalf of the sector to showcasing best practices at seminars and roundtables to showing leadership and gaining recognition as committees address key issues.

Member Companies find value in the many workforce training programs available, such as the Executive Leadership Program, our intern/extern programs and Oil & Gas 101. The Executive Leadership Program, which begins each January, is a year-long structured course that helps member-company personnel to grow their leadership skills and maximize their capabilities. The intern programs provide superb student access to Member Companies that may not otherwise be able to take advantage of engaging the young talent from Rice and other Texas universities. Oil & Gas 101, which is held this year on October 3-4, offers a broad look at the industry for newcomers and support staff. Both programs provide beneficial training that will strengthen their individual companies.

PESA is also dedicated to the long-term educational aspect of future industry leaders by supporting STEM education through elementary, middle and high schools, and the undergraduate level of college. Association Members raise funds every year through the Explorers and Energy Education Committees to donate to the award-winning IPAA/PESA High School Petroleum Academies, middle school STEM Exploration programs, and contributions to organizations who seek to promote STEM learning to underserved populations.

I encourage Member Companies to reach out to the PESA staff to find out how you can become involved. You may wish to network with other industry leaders at events. If you have contacts at other companies that you feel would be a good fit for membership in the Association, please let us know. Please plan to periodically visit the PESA offices in Houston and speak with the staff. It’s a great way to learn more about the things PESA is doing and how your organization may become more involved. Leslie and her staff are here to help your company achieve great things, whether it be through workforce development, targeted advocacy, or through executive engagement at our C-suite level events.

I hope during the next 15 years of PESA that we will achieve even greater heights in time to celebrate our 100th anniversary. I’m confident that our Members can innovate, effect change and lead the oilfield services and equipment sector toward a prosperous future.

Dan Domeracki
PESA Chairman
PESA Members,

As summer in Houston draws to a close (even though the weather doesn’t appear to realize it) and our Member Companies begin planning for a busy fourth quarter, I’d like to highlight the aspects of PESA that supported our Members located outside of Houston this year. The Association is comprised of Members located in almost all 50 states, and many also have global locations. PESA provides valuable opportunities for participation that don’t always involve leaving your office, or even traveling from your city.

We offer two critical online databases that provide industry information and benchmarking data specific to the oilfield services and equipment sector: the Credit Interchange Division (CID) and the newly launched Health & Safety Benchmarking Digital Platform.

The CID database, a unique confidential exchange of up-to-date ledger experience that reduces DSO and provides critical credit intelligence, currently maintains records of more than 300,000 ledger entries on nearly 50,000 existing and potential customers. PESA recently launched an enhancement that allows current CID members the ability to also source international credit data. These reports will be available at a discounted rate through the end of 2019, and the CID Operating Committee plans for quarterly country-specific International DSO Reports.

The Health & Safety Benchmarking Digital Platform offers Member Companies the ability to submit anonymized data to identify baseline performance standards that can be compared against industry peers. This platform allows your company to capture key safety statistics and source aggregated findings.

Because networking and training are key to our mission, we offer many events outside Houston – in areas where our members are most active. The West Texas Steering Committee develops a slate of regional district meetings held in Midland and Odessa. Our most recent meeting was with Dave Stover, Chairman, President & CEO, Noble Energy, in June and the next events will be at the Petroleum Club of Midland in October, centering around attracting talent to the Permian and executive insights. Regional events are also hosted in Oklahoma, Colorado and Louisiana.

Finally, because many of our Members have a global presence, PESA is committed to supporting region-specific issues and local content efforts in many International regions of development. The success of our Middle East Regional District Meeting last year at ADIPEC has launched the PESA MENA Chapter. This chapter has 15 Member Companies on a steering committee and plans to meet again at ADIPEC this November.

Additional international chapters are currently in development in Mexico City, Australia and Argentina. Where our members identify areas in need of a consolidated voice for the oilfield services and equipment sector, PESA is ready to support.

PESA promotes the oilfield services and equipment sector and provides Member Companies with opportunities to train their workforce, elevate business issues and network with other Members. We as an Association are successful only if our members succeed.

Thank you for your engagement in PESA.

Leslie Beyer
PESA President

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PESA Supporting You Where You Are: Online Databases

PESA Expands Credit Interchange Division Offering for Companies With Global Customers

MORE THAN HALF of PESA’s Industry members utilize PESA’s Credit Interchange Division (CID), a unique confidential exchange of up-to-date ledger experience that reduces DSO and provides critical credit intelligence. Members gain access to a database of over 300,000 ledger entries on nearly 50,000 existing and potential customers in the energy industry.

A new enhancement to the current PESA/CID portfolio offers members the ability to submit international as well as domestic data. As an added benefit, international reports will be available at a discounted rate of $20 per report through December 31, 2019. Simultaneously, PESA staff will prepare a separate country-specific International DSO Report starting in September 2018.

"I am looking forward to other CID members submitting their data," said Lauri McDonald, Director of Credit, Nabors Drilling Technologies USA, Inc. "For the U.S., our reporting is excellent and allows us to make better credit decisions."

Increasing membership in PESA/CID ensures the quantity and quality of information available. With more than 60% of participating PESA member companies participating in automated file submission, the system credit histories are continuously expanding. With this international offering, the global database will provide an even greater value, supporting our members in all regions of the world.

The CID Operating Committee is made up of current users of PESA’s Credit Interchange Division (CID) credit database and network. This Committee works with PESA staff to oversee the operations of CID and continuously works to grow and develop resources for this network.

“NABORS IS EXCITED TO SHARE OUR INTERNATIONAL CUSTOMER CREDIT EXPERIENCE. WITHOUT CID, MY JOB WOULD BE MUCH MORE CHALLENGING”

- Lauri McDonald, Director of Credit
Nabors Drilling Technologies USA

PARTICIPATING COMPANIES:
PESA Launches Industry-First Health & Safety Benchmarking Digital Platform

THE PESA HEALTH AND SAFETY COMMITTEE has launched the much-anticipated PESA Health & Safety Benchmarking Digital Platform. The application will use anonymized company data to identify baseline performance standards, illuminating strengths and weaknesses against industry peers.

ABOUT THE PLATFORM
Users will have access to information yet unavailable in other industry databases.

For maximum flexibility, reports will be printable and easily convertible into charts and graphs. The platform will also be usable on most iOS and Android mobile devices.

PESA understands the sensitive nature of an organization’s health and safety data. To ensure confidentiality, critical steps to keep company-specific data secure have been added. Users will only see their respective data; to anyone else, their data will be unidentifiable. Also, the platform’s software will be designed to function autonomously after launch, requiring minimal outside intervention to maintain high confidentiality standards.

The most critical determiner of the platform’s success will be member investment. The more members contribute their data early on, the more accurate and generalizable the reports will be. The first year’s payment will also ensure access through the end of 2019, providing excellent value for members who subscribe immediately. PESA members will pay $500 for the annual subscription, while non-members will pay $750.

PESA’s strategy with this project is to grow and develop over time with increased member users. With the support of our membership, this goal, and by extension, the platform’s increased usefulness, will be more quickly achieved.

PESA Supporting You Where You Are: Regional Districts

Dave Stover, President and CEO, Noble Energy, Discusses Challenges Facing Oilfield in Permian Basin

ON JUNE 28, PESA HELD A WEST TEXAS Regional District Meeting at ValTek industries in Odessa, TX. Featuring keynote speaker Dave Stover, President and CEO, Noble Energy, the meeting provided an opportunity for PESA members to discuss the challenges facing companies in the Permian Basin.

Following opening remarks from Pat Bond, Co-CEO of Gravity Oilfield Services, Jim Wicklund, Managing Director – Research at Credit Suisse, presented his analysis of present and future energy markets. Wicklund stressed the positive opportunities of the production lull that will soon result from insufficient regional takeaway capacity. This decline, Wicklund assured, comes at a perfect time.

Stover discussed the Permian Basin’s journey since the first Santa Rita boom nearly a century ago, and he emphasized the market’s resiliency. “How many industries can say they lost about 50% of their revenue almost overnight and are still in business with a bright outlook and a bright future?” he said.

Stover closed the meeting by sharing strategies for sustaining improvement in the Permian. First, the market’s upcoming stability should be leveraged to court investors back to the area. Second, companies must continue to streamline water use, decrease gas emissions, and highlight their environmental efforts. Third, addressing regional workforce concerns such as housing and talent retention must be a priority.
Success of 2017 PESA Middle East Regional District Meeting Spurs Chapter Growth

IN 2017, THE PESA INTERNATIONAL OUTPOSTS COMMITTEE identified the Middle East as a targeted region to host an event where members could address region-specific issues through an influential industry group, engage in best-practice sharing and receive region-specific industry intelligence. The PESA Middle East Regional District Meeting was held at the Schlumberger Middle East and Asia Learning Centre in Abu Dhabi on November 14, 2017 during the Abu Dhabi International Petroleum Exhibition and Conference (ADIPEC).

The success of the event and the feedback from members resulted in the development of the PESA Middle East and North Africa (MENA) Chapter. The Chapter was created to align the region’s energy industry’s service, supply and manufacturing organizations with local regulatory requirements and business landscape in the Middle East and North Africa.

COMMITTEE ACTIVITIES
Dennis Jol, Vice President - International, DistributionNOW, sits in region and chairs the MENA Steering Committee on which 15 Member Companies serve. The MENA Chapter is looking to grow its participation, as well as build out the subcommittees the Steering Committee has identified as most critical in the region.

The Middle East Regional Chapter Committees will hold quarterly meetings and be tasked with keeping Member Companies engaged and informed with the latest regional topics around the committee focus subject. In addition to Jol, the Committee leads are:

- Local In-Country Value: Ed Whitnell, VP - MENA, NOV
- Human Resources: Riaz Jumabhoi, EH Director, Gardner Denver
- Health & Safety: Steve Abbiss, General Manager, Middle East, TechnipFMC

The Middle East Regional Chapter will also host biannual events which will be open to all Members as an opportunity to network and share best practices and general industry information. The next event is scheduled during ADIPEC on November 15.
Executive Address with PESA Chairman Dan Domeracki, Schlumberger

PESA Chairman Dan Domeracki, Vice President, Government, Industry & Global Stewardship, Schlumberger, headed up an Executive Address for PESA Members and customers at Topgolf on July 26.

Domeracki shared his insights on career progression and success, which come from more than 40 years of industry experience. The event was hosted by the Emerging Executives Committee.

From taking ownership of his family business at age 16, when his father was deployed to Vietnam, to his current role at Schlumberger, Domeracki said he is an entrepreneur at heart who has looked for opportunities and executed them in a way that has lead him on a pathway to success in the oil and gas industry.

At age 20, while taking college geology classes, he created a device to measure how fast sediment retreats. This project gained him a full-scholarship to graduate school at the University of South Carolina.

Shortly after college, Domeracki formed a new business with three other college classmates called RPI. While working for this new company, he spent three months in 1978 in France on the Amoco Cadiz oil spill, the first major oil tanker spill. He also traveled to Chile for a long-term study on oil spills, where he built reservoir models and mapped the United States’ coast before those processes could be done on computers.

By the downturn in 1986, RPI had five energy offices. Schlumberger acquired the company, and Domeracki joined the team. He said he was fortunate enough to be able to travel the world to learn how Schlumberger operates and took on roles of increasing responsibility — navigating numerous market fluctuations and corporate downsizing, mergers and acquisitions.

Mentors helped him progress through his roles at Schlumberger, and he shared four pieces of advice with the audience.

> THANK YOU TO OUR SPONSORS

TOP, HIGHEST TEAM SCORE: Jonathan Rekieta, Gardner Denver; Juston Festervand, Sunbelt Steel; Rylan Ardoin, Gardner Denver

RIGHT, HIGHEST INDIVIDUAL SCORE: Greg Gilbert, Galtway Industries
Members Share Insights on Current Trade Regulations and the Supply Chain

PESA HOSTED A ROUNDTABLE, “Trade Regulations, Tariffs, and the Potential Effects on Supply Chain,” on May 11 supported by the PESA International Trade Policy and Supply Chain Committees. Panelists included Jim Owsley, Vice President, Supply Chain, DistributionNOW; Kartapurkh Khalsa, Senior Counsel and Director of Customs Compliance, NOV; and PESA Advisory Board Member Doug Polk, Vice President, Industry Affairs, Vallourec. Brad Wise, VP Marketing, DistributionNOW, moderated.

This past March, the Trump Administration imposed a 25% tariff for imported steel and 10% tariff for aluminum under Section 232 of the Trade Expansion Act of 1962. PESA has actively engaged this topic and the two committees developed the roundtable to address this critical issue.

Polk shared insights on seamless steel imports as an integral part of the U.S. market, illustrating with regional import data. Polk then addressed Section 232, a mechanism under the Trade Expansion Act of 1962 that allows the U.S. government to evaluate the effect of imports on national security. To receive product exemptions from the steel and aluminum tariffs, organizations are required to submit exclusion requests to the U.S. Department of Commerce, providing information about their product. Polk emphasized the importance of organizations filing product exclusions and taking advantage of the comment period.

Owsley then segued into an overview of the effect Section 232 has had in the United States and the global price increases of such steel substances as hot roll coil. He also shared details on Section 301, an investigative mechanism being used to determine whether China’s acts, policies, and practices related to technology transfer, intellectual property, and innovation are unreasonable, unjustifiable, or discriminatory and burden or restrict U.S. commerce.

Khalsa touched upon Section 232 as well, sharing the Request for Exclusion from Remedies: Section 232 National Security Investigation of Steel Imports document with the attendees. He provided an extraordinarily beneficial and comprehensive overview of the form, explaining sections that have proven to be difficult and ambiguous for companies.

PESA Vice President of Government Affairs Tim Tarpley recently testified on behalf of PESA in front of the United States Trade Representative opposing the proposed tariffs and expressing concerns about potential supply chain disruptions to the energy industry in the United States.

PESA will continue to follow these escalating tariff threats and work in conjunction with other associations to advocate on behalf of the specific needs of the services and equipment sector.
Developing Company Culture: How Does the Industry Change?

WITH ONLY ONE PERCENT of college graduates in the United States considering a career in the oil and gas industry, perceptions of the industry need to change to attract top talent to the service, supply and manufacturing sector. PESA Member Companies are collaborating on strategies to attract top talent to collectively move the needle.

PESA’s Human Resources Committee, partnering with the Engagement and Emerging Executives committees, held a recent roundtable about developing culture on May 15 at Baker Hughes, a GE company. Leah Carter, University Affairs Manager, Halliburton, and Laura Cofino, Global HR Business Partner – Rod Lift Systems, Baker Hughes, a GE company, shared best practices. Committee Chair Dave Warnick, VP Human Resources, Weir Oil & Gas, moderated the discussion.

By 2020, millennials will make up more than half of the U.S. workforce. Citing a survey completed by students at 30 top schools, Carter said two things attract these workers to a company: people and culture.

Carter advised the audience to consider their Employer Value Proposition, which should include details on how the company engages their workforce, how it communicates the company values and humanizing the industry. A workforce may have a different perception about the company than leadership might expect, so it is important to be in tune with employees, discover what they value and communicate how the company can provide it. She suggested publicizing community engagement, demonstrating IT advances, and showcasing the company’s culture and people.

Cofino discussed how Baker Hughes developed its culture after a merger in 2017 with GE Oil & Gas. They surveyed employees and created an integration team comprised of staff from both organizations. The survey indicated the employees valued customer service, employee training and development, and collaboration, so the integration team was able to plan team-building exercises that emphasized those traits and create a collective corporate culture.
THROUGH THE LENS of one of the biggest Sino-American trade scandals in history, a former lawyer for ZTE USA addressed participants during the PESA Legal Committee’s 2018 Legal Seminar on May 16.

Former U.S. attorney Lawrence Finder and Ashley Yablon, General Counsel for Moroch Holdings, Inc. and former General Counsel to ZTE USA, discussed handling the nuances of international business law.

In 2011, Yablon was hired at ZTE USA, a Texas-based offshoot of the Chinese tech giant’s Shenzhen headquarters. Just one month into his tenure, the House Intelligence Committee launched an investigation into ZTE’s trade practices with U.S. enemy states. Then in March 2012, Reuters obtained a 900-page packing list detailing the illegal shipment of American-made tech components to Iran. This development prompted a subpoena from the U.S. Department of Commerce.

Yablon quickly realized that ZTE was involving him in the subversion of U.S. laws. Because attorney-client privilege is waived when a business uses its attorney to commit a crime, Yablon made the difficult but ethical choice to speak to the FBI. His cooperation was exposed in July 2012, turning his life upside down. Today, six years after its transgressions were exposed, ZTE has been the target of crushing punitive measures. Its narrative offers critical lessons for attorneys at multinational corporations, Finder said.

First, corporations must understand that they may be criminally liable for the actions of their employees. In addition, lawyers should review the Department of Justice policy to ensure their corporation is awarded cooperation credit.

Second, during investigations it is imperative to consult outside counsel. In some cases, multiple independent lawyers should be retained to cover parallel proceedings. It is also important to consider employees’ legal fees. Depending upon the seriousness of an investigation, the corporation may be obligated to compensate for reasonable fees and expenses. Become familiar with your company’s indemnification policy, and make sure your company has sufficient director and officer liability insurance.

Third, and perhaps most importantly, each corporation with international ties should remember to “KYC” – know your customer, know your country. U.S. laws have broad jurisdiction, and there are many more sanctioned nations, individuals, and entities than just Iran and North Korea. Always consult an experienced compliance professional to ensure your corporation is acting within the law, and be aware of common landmines like re-exportation and re-transfer.
Program's Mid-Year **Workshops a Success**

**PESA’S 2018 EXECUTIVE LEADERSHIP PROGRAM** conducted mid-year workshops that were hosted by DistributionNOW on June 20-21.

The Emerging Executives Committee held the mid-year workshops of the two sequences — Executive Presence and Engaging Leadership. Now in its fourth year, the year-long program facilitates structured leadership development in industry personnel with leadership potential.

In the Engaging Leadership seminar, held on June 20, participants explored how to create positive change in their professional spheres of influence. During Executive Presence, held on June 21, the seminar’s curriculum guided participants in developing a strong, authentic personal brand that they can naturally present to others. Included topics ranged from how participants carry themselves to how they work with others.

Outside of the June seminars, both programs consisted of a day-long seminar in January, a mentorship program, individual executive coaching, accountability partner meetings, professional strengths assessments and PESA leadership meetings. Many participants also put their knowledge to work by serving on PESA Committees and attending quarterly networking events.

The 2019 Executive Leadership Programs begin in January. Contact meetings@pesa.org for details.
ON JUNE 7, the PESA Emerging Executives Committee hosted its bimonthly leadership forum with PESA Advisory Board Member Sanjiv Shah, Managing Director, Investment Banking, Simmons & Company International®, Energy Specialists of Piper Jaffray®. Shah shared his thoughts and insights on leveraging your personal brand and effective networking skills for career progression.

PERSONAL BRANDING
Shah outlined how one can develop his or her career through effective personal branding. Ask yourself: How would your boss describe you? Build your image around your ideal answer. Be sure to differentiate yourself while focusing on what your company needs from you.

Shah also explained the importance of expressing professional goals to decision makers and superiors, followed by hard work to prove that you can advance to the next level in your career.

For Shah, answering emails within 30 seconds, working 365 days per year, and being available 24 hours a day for customer calls were key to developing his executive presence and personal brand in his first year at the firm. After gaining tenure and moving into management, he then focused more on work-life balance.

Being known as the go-to guy and a solution provider, in addition to always being available to superiors and colleagues, contributed to Shah’s positive personal brand. Shah reminded attendees not to fear their own ambition. If you want a new position or promotion, make your ambitions known to your management and ask what you need to do to get there.

NETWORKING
Shah addressed being challenged by staff senior in tenure, position and age to him. He explained that developing a network of superiors can help mitigate these issues. One participant acknowledged this advice was something they could implement immediately in their own role.

According to Shah, attending as many networking events as possible can help build and maintain a broad network that will grow with your career.

“Don’t build a network to try to use people,” he emphasized. “What has worked for me is to go into a networking event without an agenda, just have a conversation without pitching.” Pitching, he warned, just makes people mad.

Finally, Shah aid, “Surround yourself with people whose strengths complement your weaknesses. Be intentional on influencing your spheres of influence. Ask your supervisors what you need to improve on and what you do well.”

When asked how to build trust, Shah said to find an immediate connection to bridge the gap. The workplace is competitive and building trust is a long-term strategy. His rule of thumb is simple: “Do what you say and say what you do.”
WHAT INFLUENCED YOUR decision to enter the oil and gas industry?
I’ve worked in the natural resource industry and subsurface technology my entire career. When I had the opportunity to enter the oil and gas sector, it was a natural transition.

What was your impression of the industry beforehand and how has it evolved?
I was first exposed to the oil and gas industry in college and graduate school. I was impressed by the knowledge and understanding within the exploration process. Although I’m still impressed with the utilization of engineering and technology within the industry, now I have a much better appreciation for the breadth of the entire industry.

What have you found to be the most surprising about the industry?
What I’ve found most interesting is the passion the scientists and engineers have for new methodologies, innovation and safety.

What do you find the most challenging and most rewarding about the industry or your work?
The most challenging thing I find in my work is helping industry professionals to be early adopters and enabling the oil and gas field to keep pace with other industry spaces. It’s a difficult thing to change with the times and technology; however, it’s inevitable and necessary. The most rewarding thing is definitely fitting solutions to these challenges. I love solving problems, no matter the complexity.

Where do you hope to see the industry develop over the next 5 years?
I really hope to see the continued trend in increased diversity. I also hope to see the industry stay abreast with trends in horizontal industries in the adoption of transformational digital technologies.

What role do you believe you will play in the industry’s future?
I hope to have a “sticky” presence in the industry. I hope to mentor and provide visibility to women in STEM. I also hope to be at the forefront of the technological tsunami in which we are currently living. It’s a very exciting time to be working in this industry, and I’m very happy to be a part of its future.

How has your involvement in PESA supported your career goals?
PESA is a tremendous organization, and I’m extremely proud to be a part of it. Over the last year, it has afforded me many networking opportunities and leadership development opportunities, as well visibility within the industry. I look forward to continuing with PESA as I grow in my career.

Tell us about some of the people you’ve met while working in the industry and how they’ve impacted your thinking.
I’ve interacted with many different types of professionals during my time in the industry. Since I predominantly work with petrotechnical solutions and subsurface interpretation applications, I work mostly with geoscientists and reservoir, drilling and production engineers within both service companies and operators. Working with scientists requires critical thinking, fast logical problem solving and a focus on optimized solutions.

I also work with C-suite executives, IT professionals and BU managers. Working with specialists at this level of the business requires a different way of articulating solutions to challenges.

What are you most excited about for your career, your company and your industry?
Honestly, I’m very excited about the changes that I’m seeing in the industry that closely affect my career trajectory. The emphasis that I see in the industry on digital transformation, big data and analytics is extremely exciting.

In this age, the industry will need young mid-career professionals that understand the concepts and goals of the older technology, but can also grasp the newest innovations to provide a bridge to the future. I’m extremely excited to be that bridge.
## Top 15 Destinations for Q2 2018 (in U.S. $1,000)

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Sources: Data has been compiled from tariff and trade data from the U.S. Department of Commerce and the U.S. International Trade Commission.

## Q2 New Members

“PESA's ability to deliver on the needs of the diverse oilfield services and equipment sector is shown by our continued growth in membership. This ensures that we are an even stronger unified voice for the oilfield services and equipment sector,” said PESA President Leslie Beyer.