

The Proppant-Production Connection Part 2

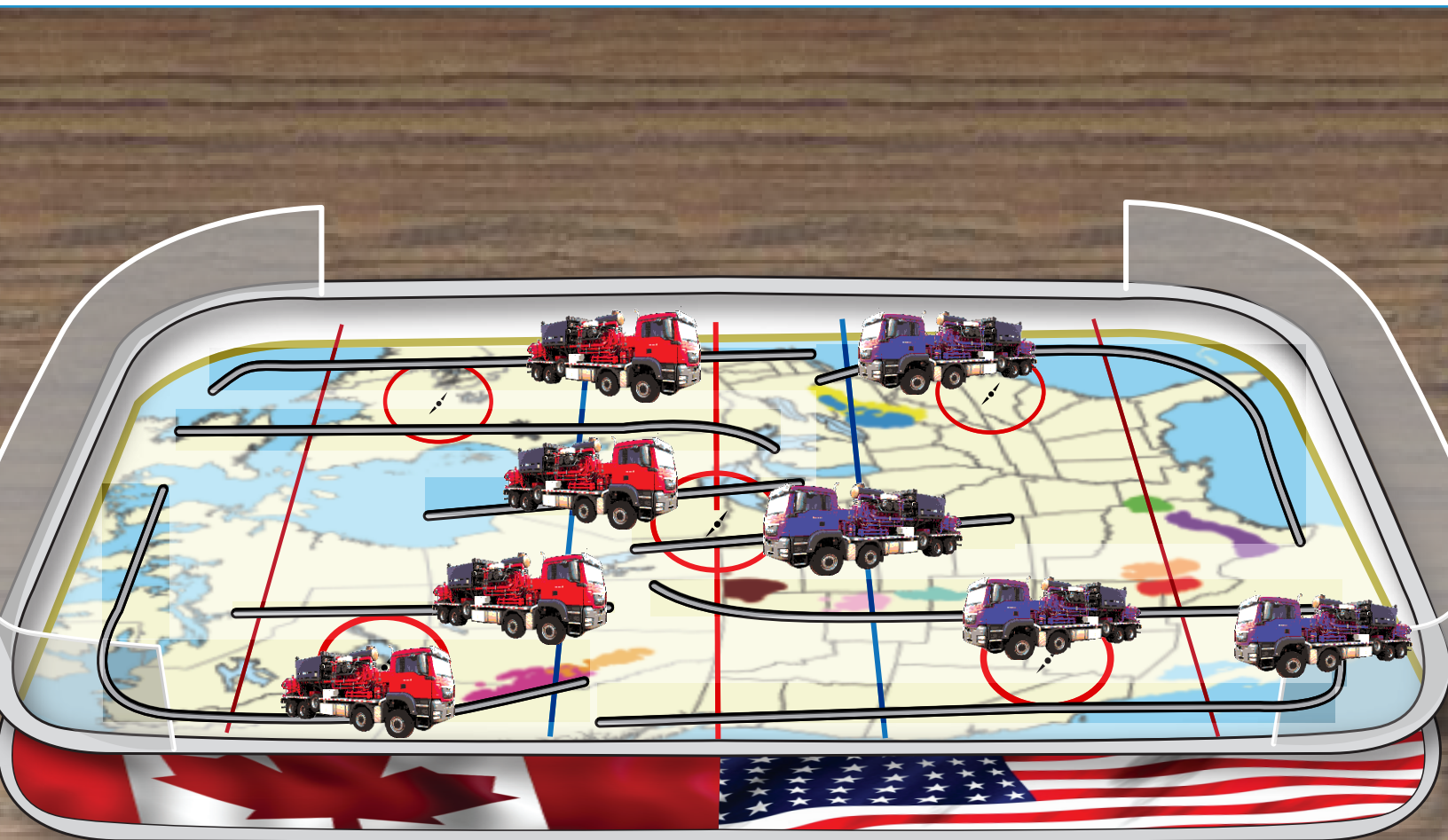
Measuring Up to Our American Cousins

Chris Podetz, P.Geol. | May 27, 2026

While the Montney and Duvernay rank as the top proppant users, formation-wise, in the WCSB, their per-well tonnage and proppant intensities are significantly lower than those of most major US unconventional plays. Comparing certain metrics shows that increasing proppant in Canada's plays may present an opportunity for increased production. ConocoPhillips' recent and ongoing high-intensity fracs in the Montney at Inga are provided as an example.



Play(s)	Montney, Duvernay, Multiple US
Fluid(s)	Gas, Condensate, Oil
Area	Western Canada, US
Operator(s)	Multiple



Montney and Duvernay operators are no slouches in their consumption of western Canadian frac proppant resources, accounting for 65% and 20%, respectively, of the 6.97 million tonnes recorded so far for 2025 (completions data for 2025 are still incomplete in the public record) (figure 1). However, these numbers pale in comparison to proppant use in most major US plays, on aggregate, per-well and length-normalized bases. A comparison of selected completion and production metrics has been made between the Montney, Duvernay, and nine major unconventional US plays—specifically the Delaware and Midland sub-basins of the Permian Basin, Eagle Ford, Haynesville, Denver-Jules (DJ) Basin, Powder River (PR) Basin, Marcellus, Utica, and US Bakken (figure 2). An abridged geological, reservoir, and production summary of each play, based on recent development, is provided in table 1.

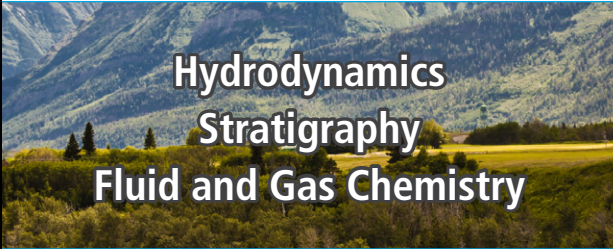
Image Overleaf
Fracking Faceoff
Image by Paul Patton, Canadian Discovery Ltd.

Maybe We Aren't That Different After All

There are significant contrasts between the plays, as may be expected from their areal and stratigraphic distribution. However, they also share several similarities as “unconventional” targets. Porosity and permeability ranges largely overlap, and all plays show some degree of overpressure. They are all fine grained, typically shaly, albeit with widely varying amounts of organic content, silica and carbonate (even within individual plays). Target zones are relatively thick, typically in the tens of metres or more, with the US Bakken being a thinner outlier.

The closest US analogue to our top producer, the Montney, appears to be the Eagle Ford, particularly the Lower Member, where the bulk of recent activity has occurred. Both plays have similar porosities, permeabilities, target zone thicknesses, and pressures. Both also produce a full range of hydrocarbon fluids (dry gas to oil), varying by location. Perhaps most importantly, both plays comprise relatively brittle, silica and carbonate-rich shales and siltstones, with the

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Montney being more siliceous/feldspathic overall (albeit with a significant dolomitic component), and the Eagle Ford consisting of more calcitic mudstone and marl with lesser silica. In terms of overall production (based on 2025 volumes), the Eagle Ford has a significantly higher liquids content overall, but matches up well with the liquids-rich Alberta portion of the Montney play.

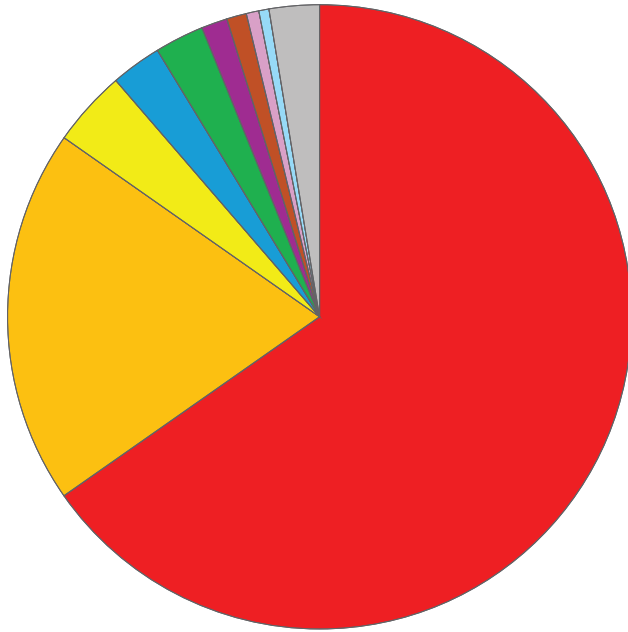
Table 1: General Play Comparisons Based On 2019–2025 Development

Play	Montney	Duvernay	Permian (Delaware) Basin	Permian (Midland) Basin	Eagle Ford	Haynesville	DJ Basin	Powder River Basin	Bakken	Marcellus	Utica
Area	NW Alberta-NE BC	Central/NW AB	West Texas/New Mexico	West Texas	South Texas	Louisiana/Texas	Colorado/Wyoming	Wyoming	Williston Basin (Montana, N. Dakota)	Appalachia	Appalachia
Age	Triassic	Upper Devonian	Middle-Lower Permian	Middle-Lower Permian	Late Cretaceous	Upper Jurassic	Upper-Middle Cretaceous	Cretaceous	Upper Devonian	Middle Devonian	Middle Ordovician
Primary Target Thickness	Up to ~300m gross; target intervals tens of meters (up to 100m net)	~25–60m net	~90–220m+ per bench (Wolfcamp A/B); ~300m+ total Wolfcamp gross	~60–150m per target (Wolfcamp benches); ~240–370m gross	~45–90m (Lower Eagle Ford target)	~75–100m	~60–90m gross (several chalk benches); ~15–30m net	~60m+ (Niobrara benches; plus Turner sand targets)	~6–15m per zone (Middle Bakken ~15m; Upper/Lower shales ~6m each) (~25m total)	~15–60m	~15–45m (Point Pleasant/Utica interval)
Porosity	~3–7% (up to 9% max)	~3–6% (2–10% range)	~5–9% (avg ~6%)	~5–10% (avg ~6%)	~8–12% (2–13% range)	~8–14%	~5–10%	~4–8% (tight chalk/shale)	~5–9% in Middle (avg ~6%); ~4–7% in Upper/Lower shale	~5–12% (locally up to 15%)	~4–8% (2–12% range)
Permeability	~10 ⁻⁸ –10 ⁻² mD	~10 ⁻⁴ –10 ⁻³ mD	~10 ⁻³ –10 ⁻² mD (can be higher with fractures)	~10 ⁻³ –10 ⁻² mD	~10 ⁻⁵ –10 ⁻¹ mD typical; up to ~0.1 mD with natural fractures	~10 ⁻⁴ –10 ⁻³ mD	~10 ⁻⁵ –10 ⁻³ mD; low end if fractures aren't present	~0.005–0.1 mD effective (5–100 µD with natural fractures)	10 ⁻³ –10 ⁻¹ mD (matrix ~10 ⁻³ mD; higher if natural fractures or dolomitized)	~10 ⁻⁵ –10 ⁻³ mD (typically tens of nD)	~10 ⁻⁵ –10 ⁻³ mD
Production Fluid	Gas & condensate (oil in shallow fringe)	Oil (shallow) to condensate/NGL-rich gas (deep)	Light oil with associated wet gas	Light oil with associated wet gas	Oil (NE flank) to condensate (core Karnes) to dry gas (deep S.)	Dry gas (high-BTU gas, some NGL)	Light sweet oil (volatile oil with associated gas)	Light oil (sweet crude, minor gas)	Light sweet oil (API ~40") with minimal gas	Natural gas (dry gas in NE; liquids-rich gas in SW)	Gas & condensate (wet gas; shallow areas yield some oil)
Mineralogy	Quartz-rich siltstone (high silica); moderate clay and dolomite cement	Calcareous organic shale (high carbonate content, moderate silica and clay)	Mixed siliciclastic & carbonate; ~50–90% quartz+carbonate, ~10% clay (very brittle)	Similar to Delaware Wolfcamp – interbedded carbonate mudstone and shale (high calcite, silica; moderate clay)	Brittle, carbonate-rich marl/shale (calcite-rich mudstone with minor clay and silica)	Laminated organic shale; clay-rich with variable silica vs. carbonate by location	Interbedded chalk and shale (high calcite in chalk; organic clay-rich marl in between)	Similar to DJ Niobrara – calcareous chalk and organic shale; Turner silt/sand secondary target	Upper/Lower: organic-rich siliceous shale (high TOC, brittle); Middle: dolomitic siltstone/sand (mixed quartz, feldspar, dolomite)	Organic-rich black shale – high clay and TOC, significant quartz silt and pyrite	Calcareous shale – interbedded organic shale and limestone (high carbonate content)
Pressure Gradient	~12–17 kPa/m, down to hydrostatic and below moving east	~16–20 kPa/m, slightly lower in N portion of WSB	~14–16 kPa/m	~11–14 kPa/m	~14–17 kPa/m (strongly overpressured in deep condensate/gas window)	20 kPa/m (extremely overpressured)	~11–14 kPa/m (moderate overpressure in core Wattenberg)	~12–14 kPa/m	~14–17 kPa/m	~9–18 kPa/m (overpressured core area, esp. SW PA/WV)	~11–15 kPa/m (overpressured in core; normal in shallower oil window)
Current Total Daily Production	2.4 mmbopd	0.26 mmbopd	5.4 mmbopd	4.2 mmbopd	2.3 mmbopd	2.7 mmbopd	1.2 mmbopd	0.37 mmbopd	1.5 mmbopd	5.2 mmbopd	1.3 mmbopd
% Liquids	28 (39% AB, 16% BC)	52	57	60	48	1	42	55	83	12	31*

*Recent production only; Historic Utica liquids content has typically been <10%

Play data taken from multiple corporate, academic, and government websites

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Zone	Tonnage (000 t)	%
Montney	4,551	65.3
Duvernay	1,356	19.5
Spirit River	274	3.9
Viking	183	2.6
Cardium	178	2.6
Bluesky-Glauconitic	94	1.3
Charlie Lake	72	1.0
Ellerslie-Gething	45	0.6
Dunvegan	37	0.5
Other	181	2.6
Total	6,971	100

* Not all 2025 tonnage data are publicly available yet; some will not be released for several months

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Completions: Onward and Upward

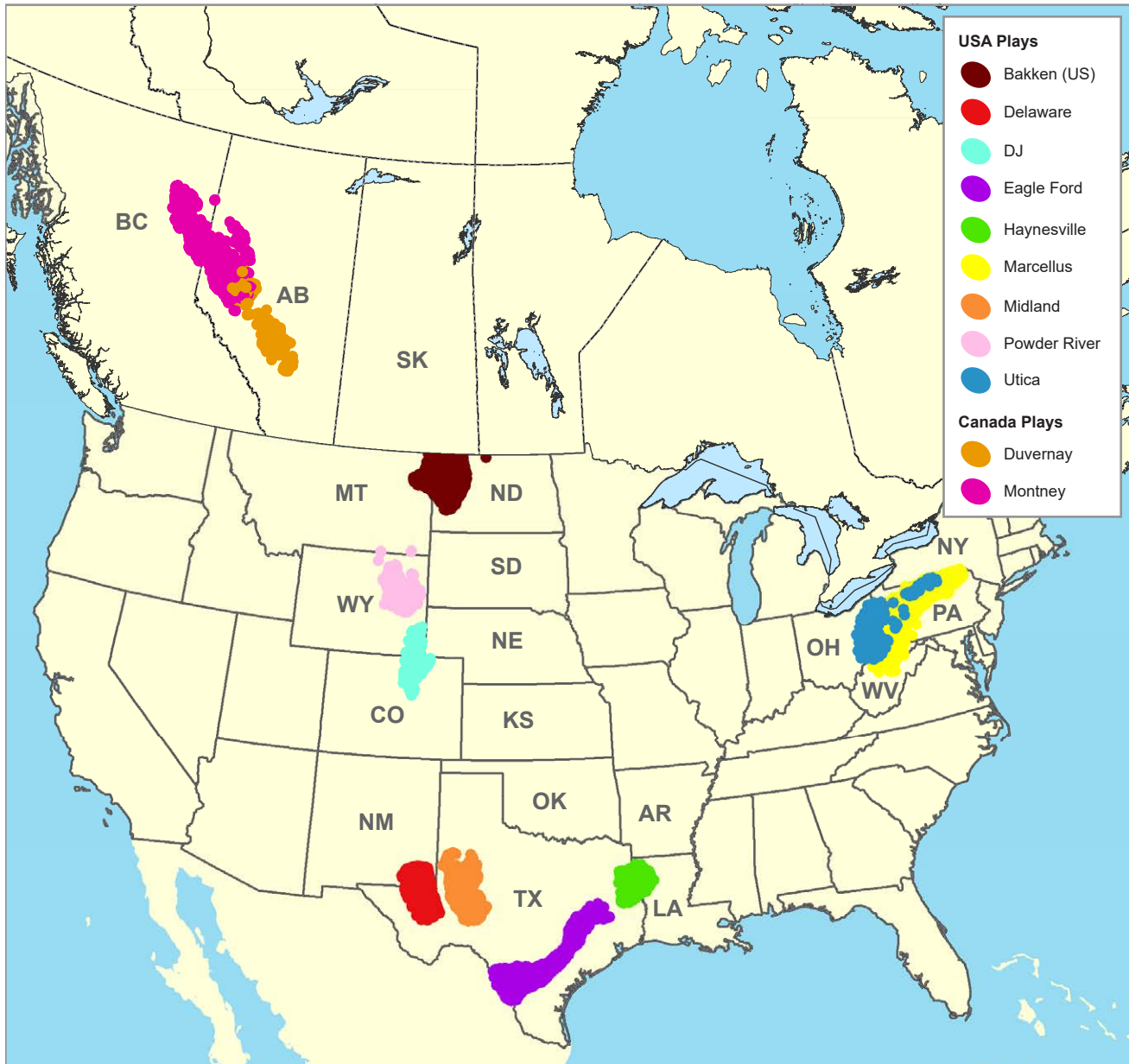
In a similar vein, proppant use trends among all 11 subject plays have shared a key characteristic of consistent growth since the onset of large-scale horizontal development in 2010 (figures 3–5). The amount of proppant used, however, varies widely between the plays. Total proppant use is largely influenced by overall activity levels, with the Permian plays (Delaware and Midland sub-basins) far exceeding any other play (figure 3). On an average per-well basis (figure 4), the Haynesville has come out on top over the last decade and a half, with the Montney consistently vying with the Bakken for lowest average, and the Duvernay also ranking on the low end. On a normalized basis (proppant per metre of lateral length) (figure 5), the story is little changed, with a slightly tighter grouping still placing the Montney near the bottom of the pack.

Appendix A, at the end of this article, provides more information on the variability of proppant

intensities used in each of the 11 plays in 2024 and 2025. The average intensities of the 10 operators using the most total proppant tonnage in each play are shown.

Not Just About Sand

Canadian frac fluid use is also, on average, lower than that of US plays. The Montney has the lowest average frac fluid intensity (m^3 fluid injected per metre of lateral length) of all the selected plays, using less than $10 \text{ m}^3/\text{m}$ in 2025 (figure 6). The Duvernay uses closer to $17 \text{ m}^3/\text{m}$, having recently dropped down from $20 \text{ m}^3/\text{m}$. This value is more in line with US plays, which in 2025 mostly fell within a narrow range between 20 and $27 \text{ m}^3/\text{m}$. Only the Haynesville ($41 \text{ m}^3/\text{m}$) and Bakken ($14 \text{ m}^3/\text{m}$) are outside this range. As a result of its low water use relative to the proppant pumped per metre, Montney average slurry concentration (kg of proppant per m^3 of frac



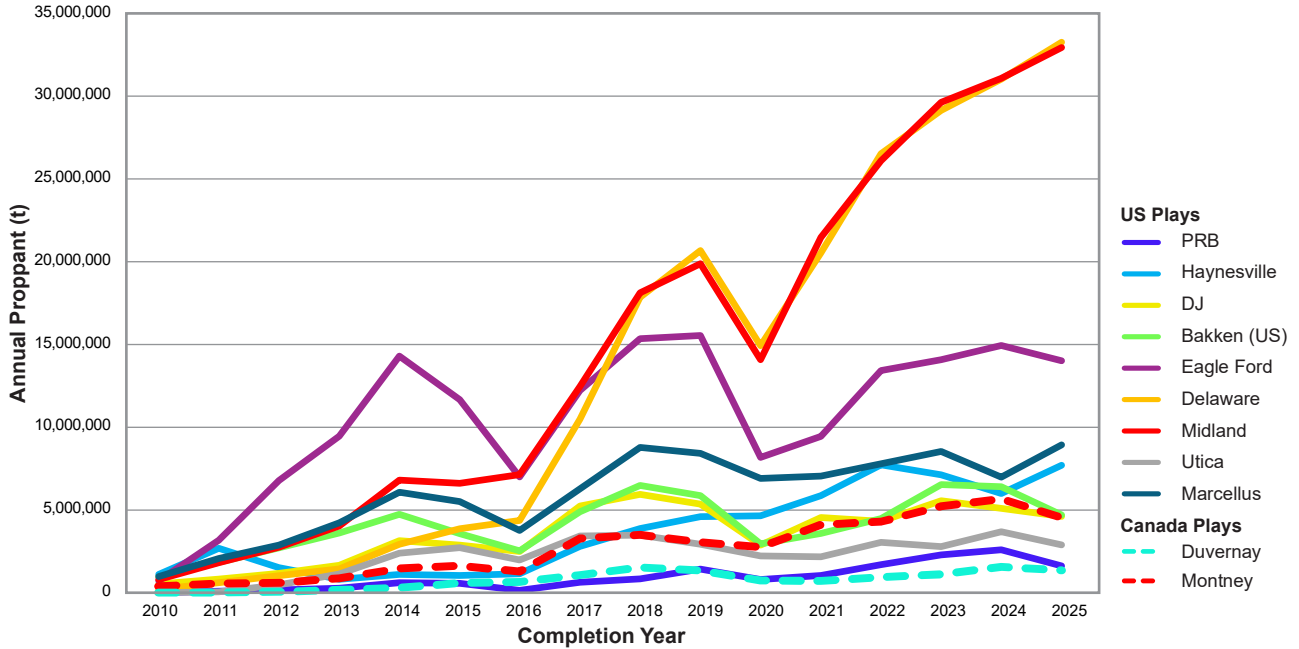
Well locations from geoLOGIC and Enverus

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fluid) is significantly higher than any other play, sitting at roughly 245 kg/m^3 in 2025 (figure 7). Slurry concentrations in almost all other plays (including the Duvernay) averaged between 130 and 175 kg/m^3 in 2025, with only the DJ an outlier at 100 kg/m^3 . It is one metric that hasn't changed significantly in value over the last 15 years for most plays. For the Montney, the historical

trend of slurry concentration (high during early years of development, lowering until 2018, and then gradually rising again) doesn't match that of any other analysed Montney completion or production metric. These other metrics, as noted, have otherwise tended to follow the trends of the US unconventional plays.

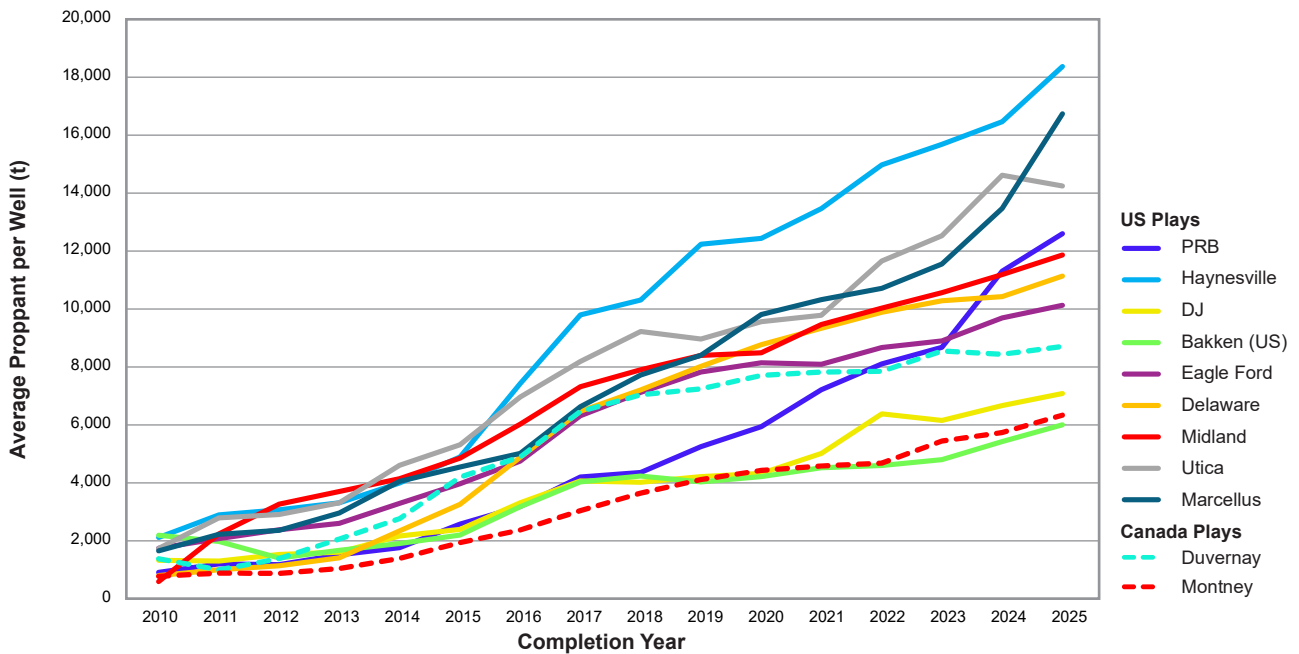
3 All Plays, Total Annual Proppant Tonnage



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4 All Plays, Annual Average Proppant per Well

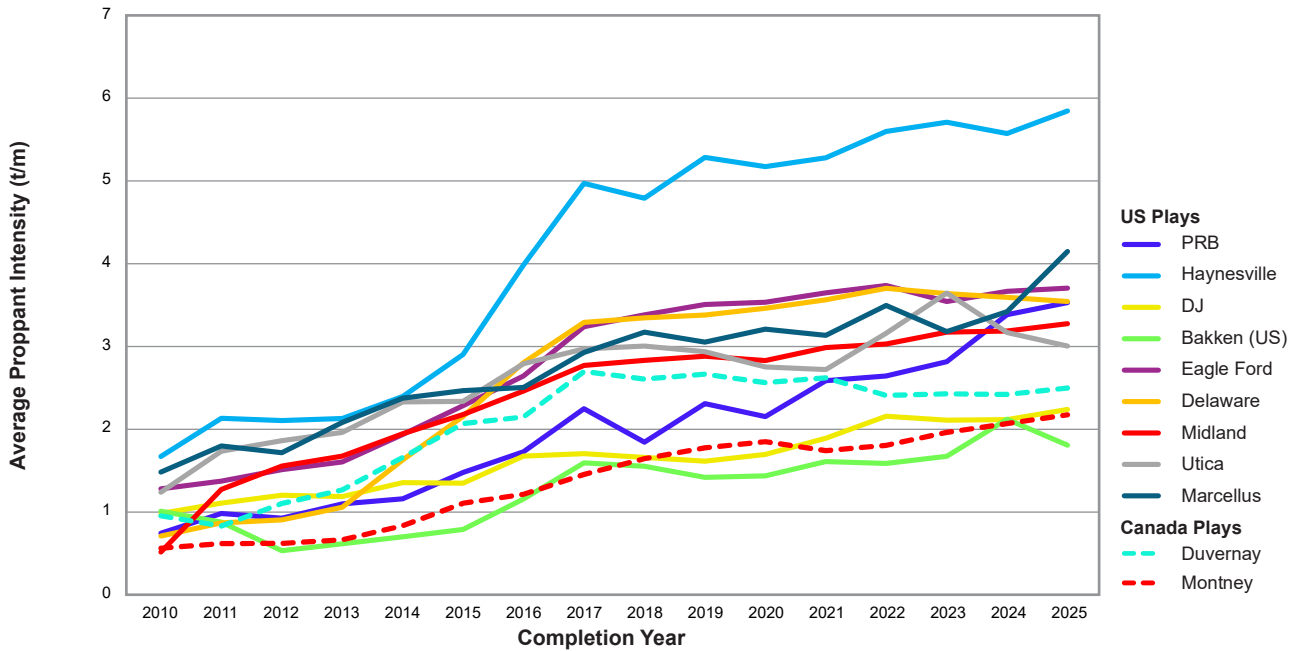


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All Plays, Annual Average Proppant Intensity

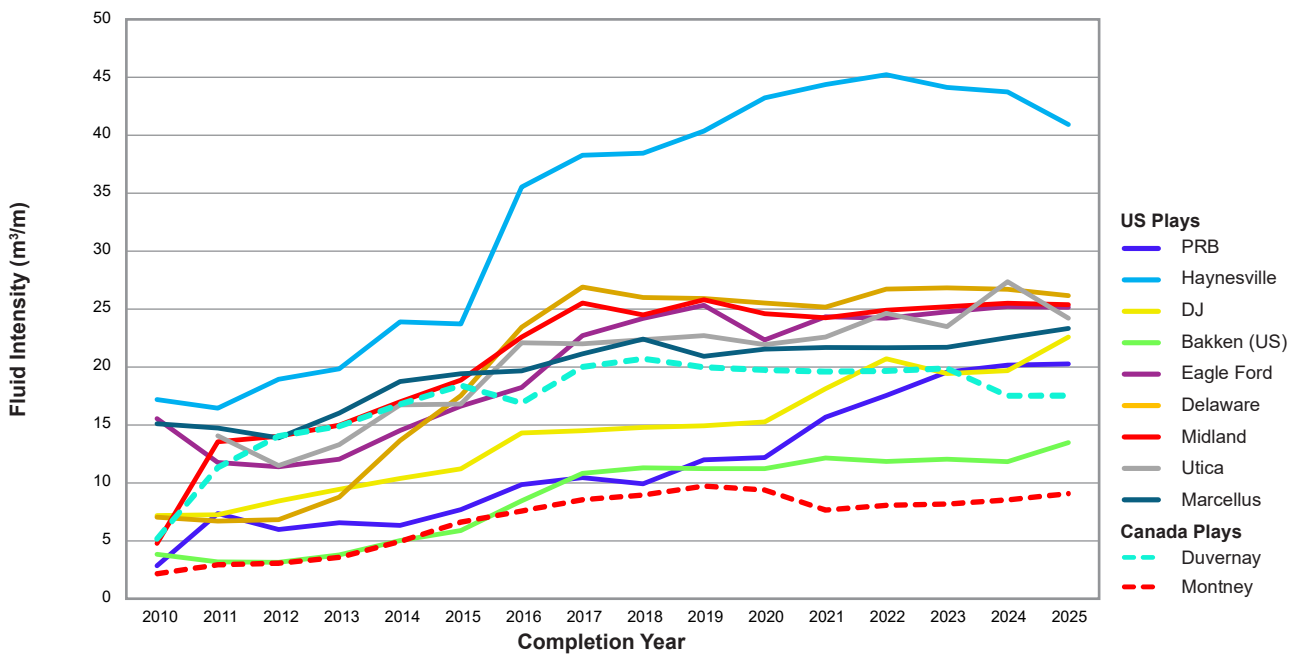


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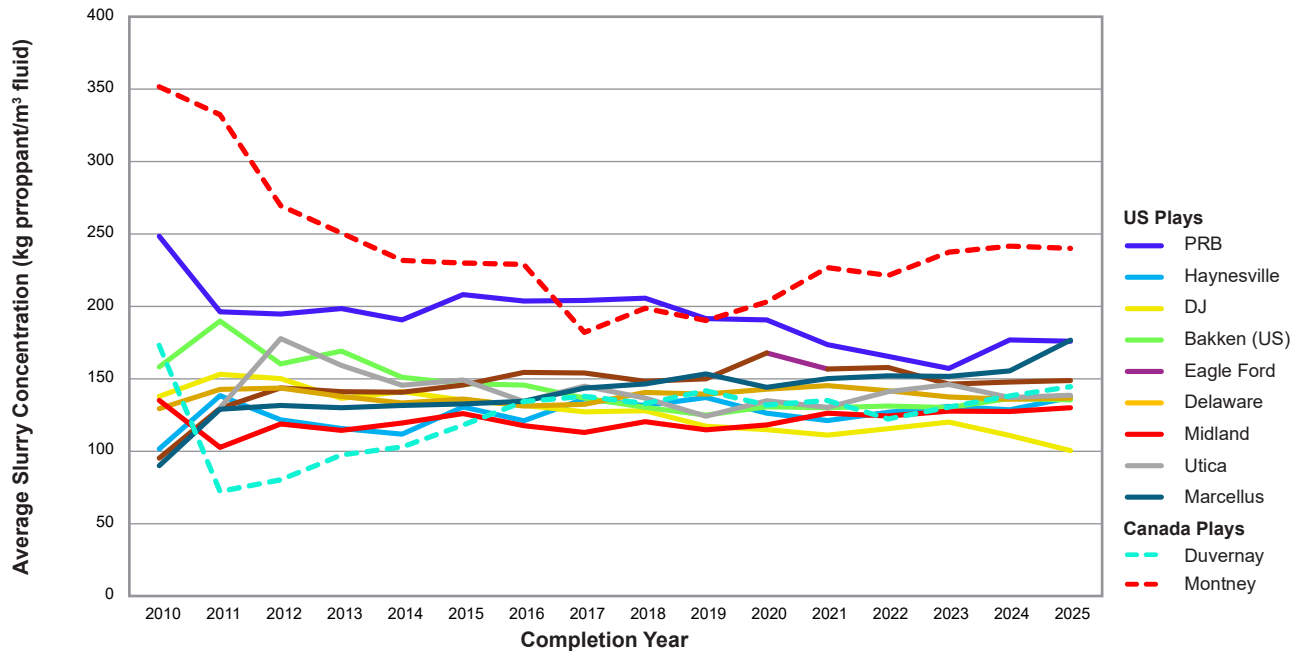
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All Plays, Annual Average Frac Fluid Intensity



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Tying It All Together

Of course, this all comes down to well production. [Figure 8](#) displays the average normalized 12-month cumulative production (BOE per metre of lateral length) of each play between 2010 and 2025. Here, the Montney only trails the gas-rich US plays (Haynesville, Utica, and Marcellus), and holds its own (or better) against the more liquids-rich plays. A direct relationship simplifies the proppant-production correlation to a simple input/output equation, as described in an earlier article (Podetz, 2025). It plots a well's total proppant tonnage against its first 12 months of cumulative production ([figure 9](#)). Again, the Montney currently sits near the bottom grouping of plays with respect to this metric, which is largely driven by completion intensities ([figures 5, 10 and 11](#)) and the mix of hydrocarbons produced from each play ([table 1](#)). Interestingly enough, recent Montney proppant per new MBOE values (since about 2017) align with those of the aforementioned three gas-rich

US plays. This could be a function of differences in deliverability and proportions of the various hydrocarbons produced (dry gas, gas liquids, condensate and oil).

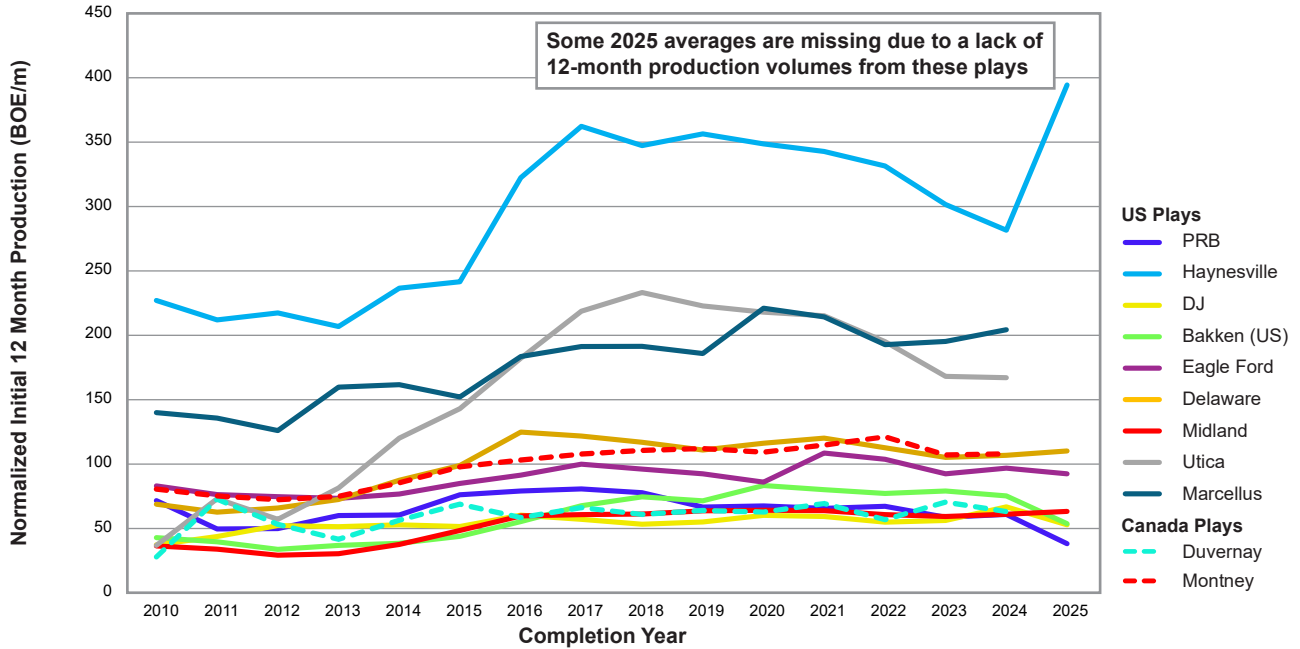
Referring back to [figure 5](#), several US plays, specifically the Permian, Appalachian, Haynesville and Eagle Ford, surpassed the current average Montney proppant intensity of roughly 2 t/m over a decade ago (between 2013 and 2016), under similar economic conditions. This time frame also coincides with the highest year-over-year increases in normalized twelve month volumes for the Permian, Appalachian and Eagle Ford plays ([figure 8](#)).

At Last, a Recent US Trend We Can All Get Behind

This poses an interesting question. If the Montney has the same proppant-to-production relationship

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All Plays, Annual Average Normalized 12 Month Initial Production

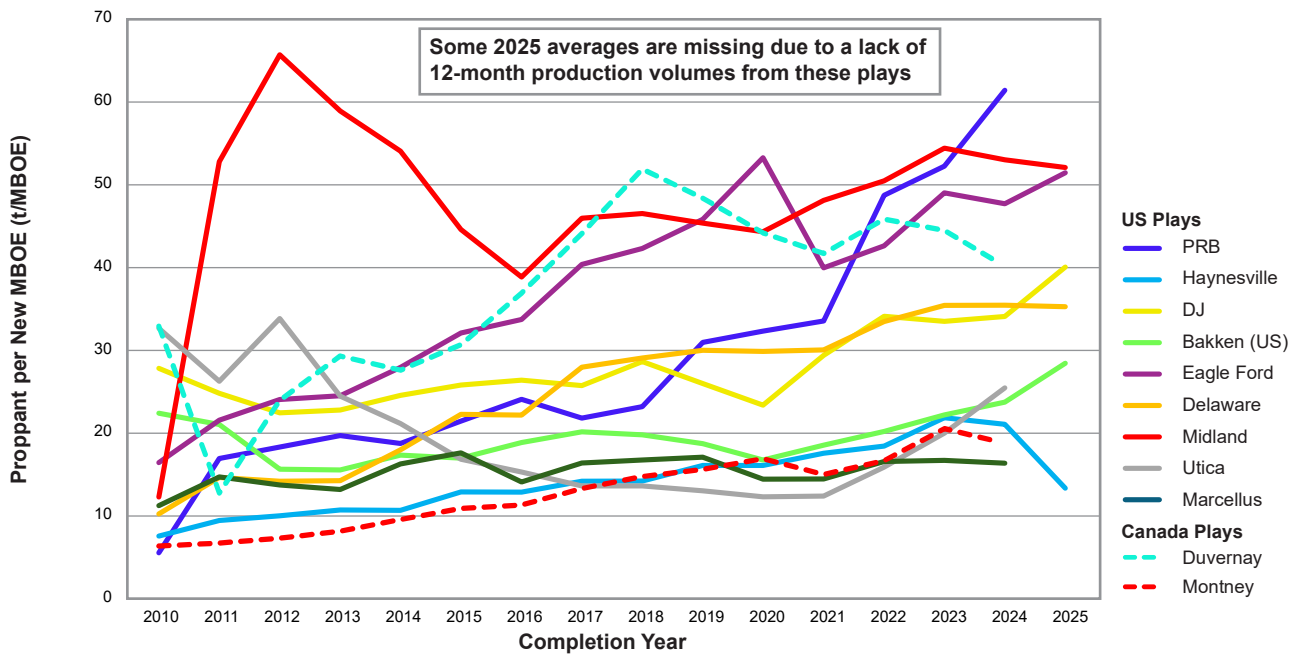


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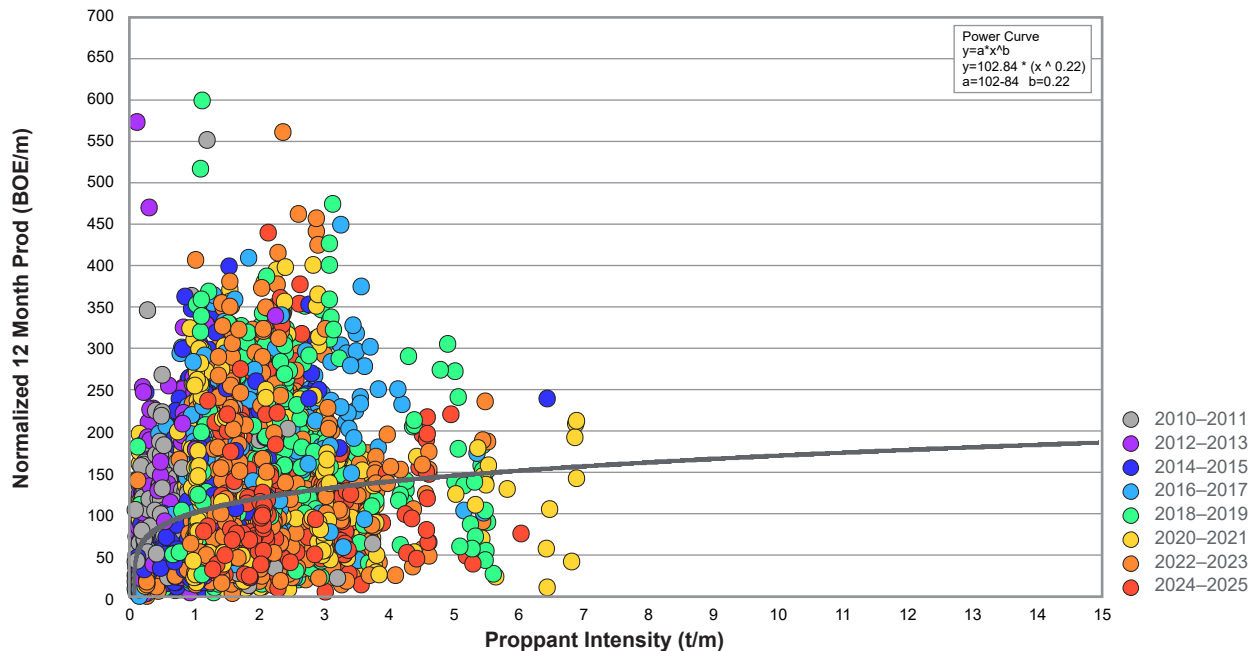
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All Plays, Annual Average Proppant Tonnage per New MBOE



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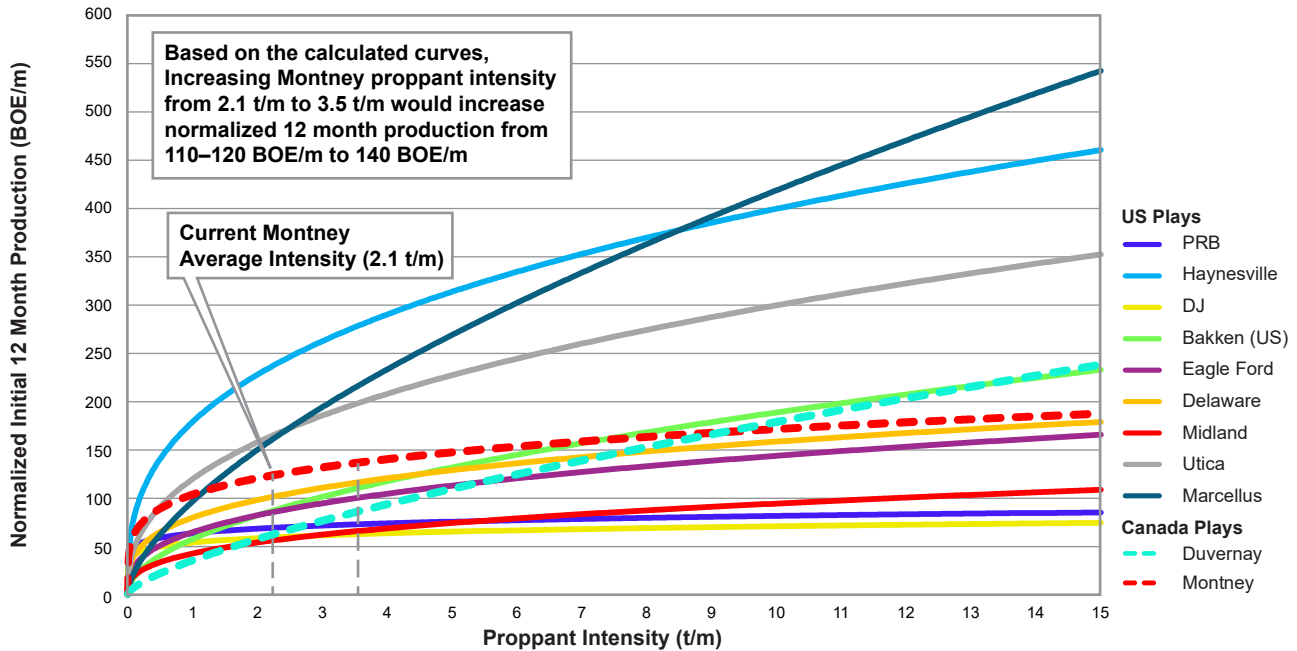
as the Haynesville, Utica, and Marcellus plays, and these US gas plays produce greater normalized volumes with higher proppant intensities, would an overall increase in Montney proppant intensities (in the absence of any other influencing factors) lead to a commensurate rise in Montney production and presumably improved economics based on these other US plays? Given the pending increase in demand for gas production with the development of Canadian LNG export facilities (Podetz, 2025), it's an important question to answer.

What Production Degradation Plots Have to Say

As noted previously (Podetz, 2025), cross-plots of individual Montney well proppant intensities versus normalized 12-month volumes (BOE/m) show that there is indeed a discernible positive, but non-linear relationship between proppant intensity and production (*figure 10*); as intensity increases, there is growth in production, but this growth gets

smaller as intensity increases. Admittedly, the mathematical relationship between the data and the curve in these degradation plots is relatively weak for the Montney (and most other plays); there is significant scatter in the data points, but a measurable relationship nonetheless exists. *Figure 11* shows the calculated curve for the Montney along with the other ten subject plays. Based on these curves, the benefit of increased proppant intensity on production is not as large for the Montney as it is for the aforementioned US gas-rich plays, but is more similar to that experienced by the US oil-weighted plays. Duvernay production appears to have a more linear relationship with proppant tonnage; there is no apparent "plateau" at higher proppant intensities.

Moving to the right along any of these curves (higher proppant intensities) means operators need to use (and pay for) more proppant. Analysis of the extremely large sample size of the US plays



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shows that they have pushed farther along these curves than the Montney, and continue to do so. The data imply that due to the consistency of long term trends, and current completion intensities remaining high, the extra costs associated with greater proppant use are economically merited in the US plays. This again begs the question: since they sit lower than most US plays on the degradation curve, why not increase Montney intensities closer to US-play levels?

You Gotta Pay to Play (Or, the Chicken and The Egg Problem)

Without considering the various scales of geomechanical issues potentially resulting from significantly increased proppant use (a topic beyond the scope of this article), other uncertainties associated with the degradation plots should be addressed. Along with the aforementioned scatter in individual datapoints, statistically speaking, there is a lack of Montney proppant intensities

with values close to US averages (say, greater than 3.5 t/m). This, of course, affects the confidence in the relationship curve at these intensity values. If there were more high-proppant intensity data points for the Montney, it could very well show a different relationship with production that what the current calculation curve shows, for better or for worse.

Carrot and Stick

Both the Alberta and BC governments offer incentives toward higher proppant use. In Alberta (Government of Alberta, 2026), the Modernized Royalty Framework Calculator includes proppant tonnage as an input that increases the cost of a well and subsequently delays the imposition of higher royalties. In BC, land use restrictions, particularly in the Blueberry First Nation Agreement area (which covers a large portion of the Montney fairway), make drilling longer laterals (and using

more proppant) a practical necessity in order to get more production per well/pad.

Holding Out on Production

One unique aspect of the Montney, compared to the US plays, is that while it is considered a “gas” play, liquids (specifically condensate and sales gas liquids) make up a high proportion of its production stream. This is true for Alberta in particular, but BC wells also have significant liquids content ([table 1](#)). This calls for a different production strategy than that of most US plays, where EITHER oil or gas is the primary objective for production fluid. Anecdotally, some Montney operators have been restricting the early flow of their gas wells in order to maintain gas liquids production; if allowed to flow to their full potential, these wells would have markedly higher initial 12 month cumulative volumes (for both gas and liquids), but their liquids production would decline relatively quickly. By maintaining a lower gas rate, liquids decline is reduced. A non-Montney example can be found in the Block 61 gas field of southwest Oman (Mollayev et al., 2025). The point being, under the reasonable assumption that some Montney wells are restricted in their early production (and US wells are not), the current Montney production degradation curve ([figures 10 and 11](#)) would show a different relation between proppant and production if those same wells were allowed to flow unrestricted. They would show, in fact, a greater overall production increase with higher proppant intensity—a more positive relationship.

What Goes Up...Must Come Up

One likely consequence of a significant increase in Montney proppant intensity, be it on a single well or play-wide scale, would be an accompanying increase in water use. Frac fluid intensity is expected

to rise in tandem with proppant intensity, or else slurry concentration (already relatively high for the Montney in general) ([figure 7](#)) could rise to the point where wells become at risk of sanding off.

Is ConocoPhillips onto Something?

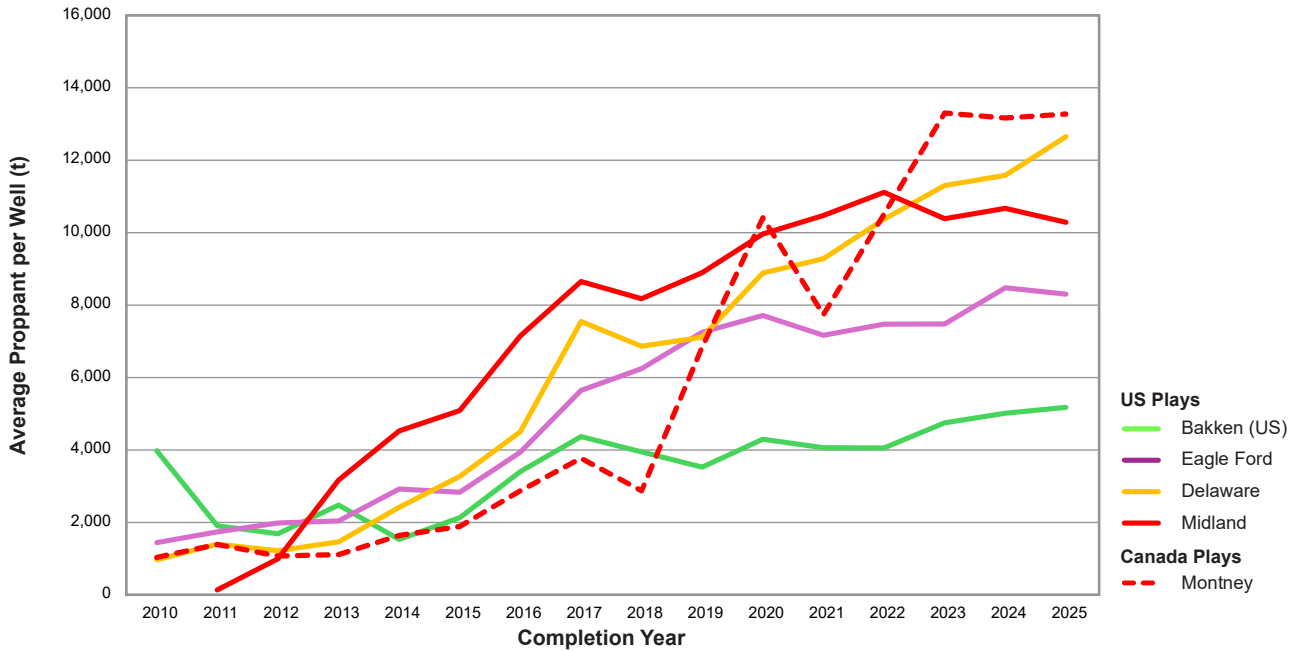
A list of Montney operators that utilize relatively high proppant intensities AND have concurrent US operations experience is quite short...but ConocoPhillips is on it. The company is developing the Montney in the Inga area of northeast BC, and is also active in the US Bakken, Eagle Ford, Delaware Basin, and Midland Basin. ConocoPhillips’ Montney average proppant per well and proppant intensity values were below that of its US plays until 2018 ([figures 12 and 13](#)), when the company drastically increased its Montney completion metrics. They now sit higher than those of their American counterparts (and indeed any other Montney operator), and production has significantly improved ([figure 14](#)). Interestingly, there was not a substantial rise in average normalized production until 2023 and 2024, while proppant per new MBOE values rose only slightly ([figure 15](#)). An anomalous spike in proppant per new MBOE values in 2022 was a result of low twelve month volumes in many of that year’s wells; these wells were subjected to significant shut-periods over their initial year of production, “artificially” lowering their early volumes and adding credence to the aforementioned idea of production restrictions adversely affecting the overall Montney production degradation curve.

What About the Duvernay?

The Duvernay currently has a low (albeit historically consistent) normalized 12 month production volume of roughly 60 BOE/m, as of 2024 (the latest completion year for which a sufficient 12 month production dataset is available) ([figure 8](#)).

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ConocoPhillips Annual Average Proppant per Well by Play

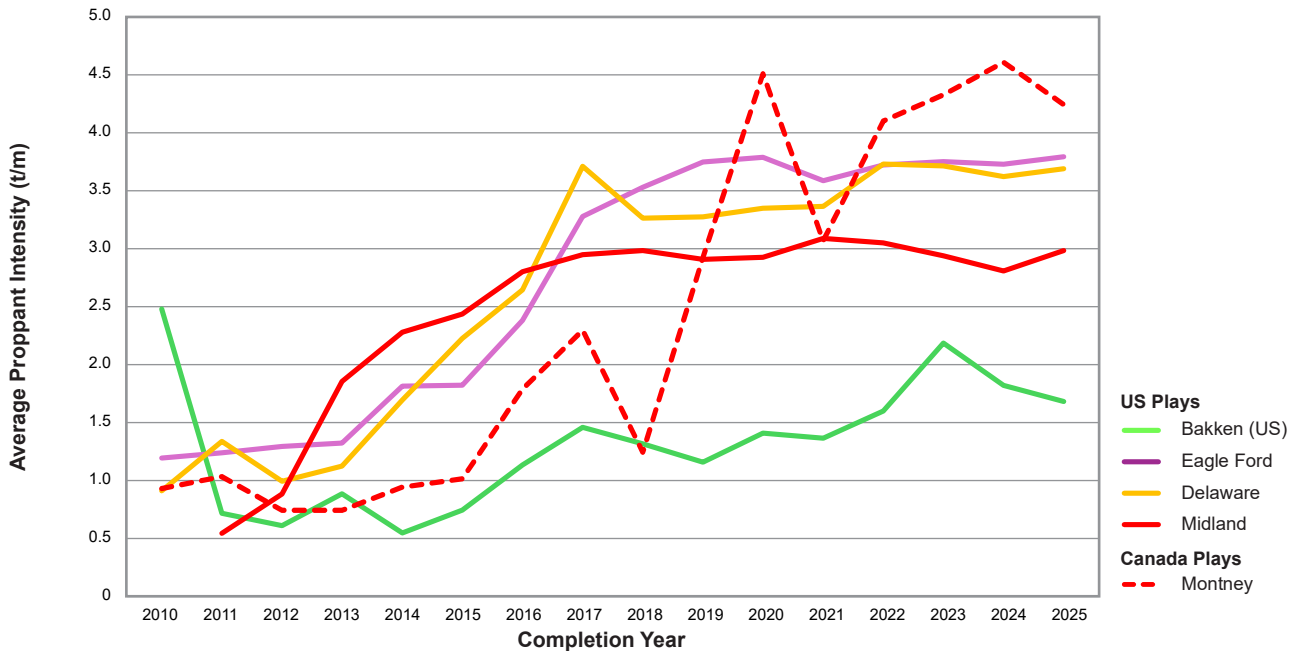


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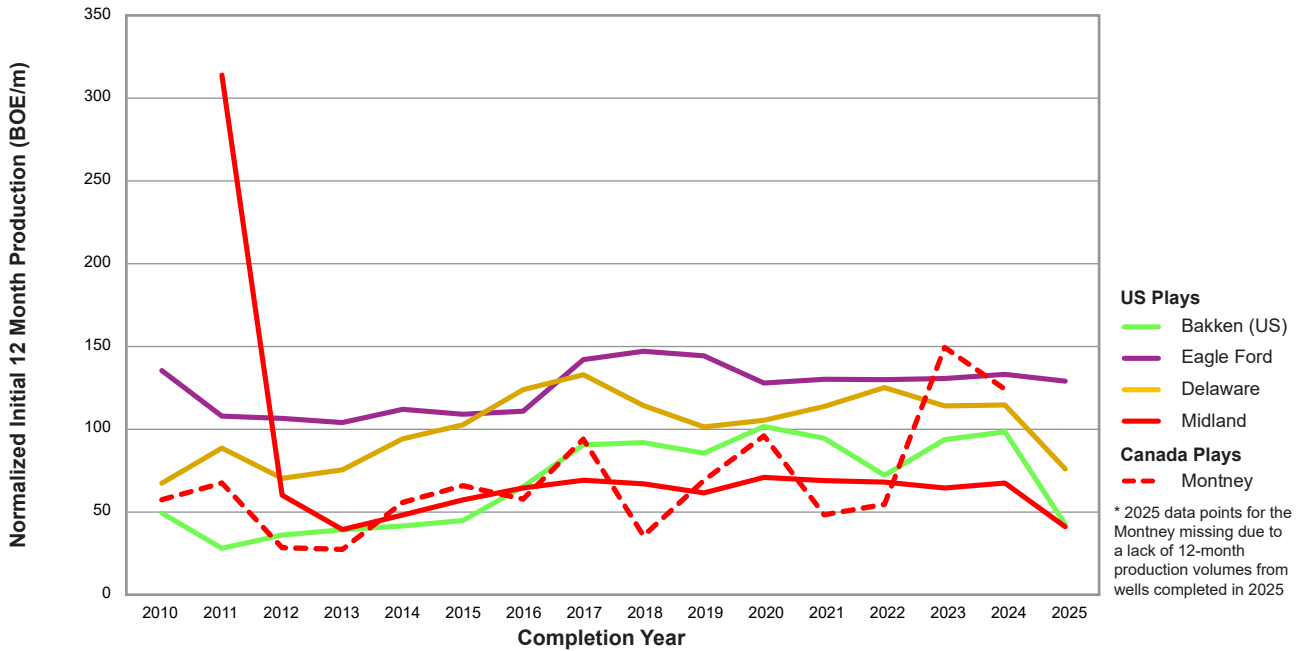
ConocoPhillips Annual Average Proppant Intensity by Play



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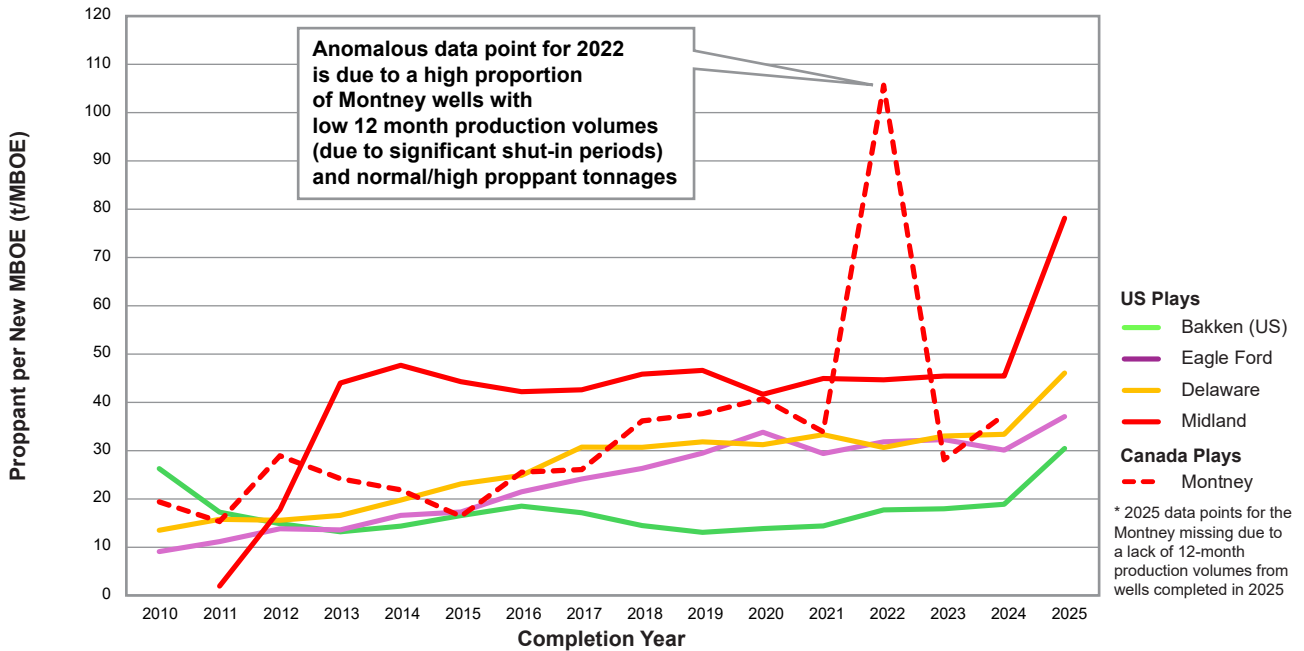
ConocoPhillips Annual Average Normalized 12 Month Initial Production by Play



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ConocoPhillips Annual Average Proppant Tonnage per New MBOE by Play



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Duvernay proppant intensity (figure 5) and average proppant per new MBOE values (figure 9) dropped between 2018 and 2024, without any commensurate drop in normalized production. This rather anomalous phenomenon (compared to the other analysed plays) can be attributed to the Duvernay's unique geography, development history, and relatively low total well count. From the beginning of horizontal development until 2018, the gas-rich and high-pressure Kaybob region dominated activity, accounting for roughly 90% of all the Duvernay wells drilled. Beginning in 2018, and until about 2023, development increased significantly in the East Shale Basin (ESB), a shallower, oil-rich play that was developed with substantially lower completion intensities. Over this time, the portion of Kaybob drilling fell to roughly 60% of total Duvernay activity. Since 2023, ESB activity has also fallen off, but has been replaced by a surge in West Shale Basin (WSB) drilling, which includes a mix of oil and gas-rich wells. Currently, WSB completion operations remain less intense than those at Kaybob, but are starting to trend upward. In any event, as West Shale Basin development continues and matures, it is expected that Duvernay proppant intensities, and proppant required per new production unit, will increase.

Conclusions

On a broad scale, Montney production would likely increase with the use of higher proppant intensities. Essentially all US plays, with reservoir characteristics similar to those of the Montney, have shown that significantly higher proppant intensities can be used to economic benefit. Current production degradation plots indicate a given proppant intensity increase may not have as great an effect on Montney production as it does on some American plays, but this could be a result of production restriction on Montney wells. ConocoPhillips' recent activity at Inga is the best Canadian example of drastically increased proppant intensities having a strong positive effect on production rates.

The Duvernay is also primed for a proppant intensity increase, but for reasons more related to its relatively early stage of development. Compared to the other analyzed plays, its average proppant intensity has remained constant over the past several years, mostly due to a move by operators into areas such as the ESB and WSB where proppant use has been less intense than at Kaybob. As development expands and matures, however, per-well proppant use should start to increase, once again matching the trends of other plays.

Canadian Discovery Related Technical Studies and Products

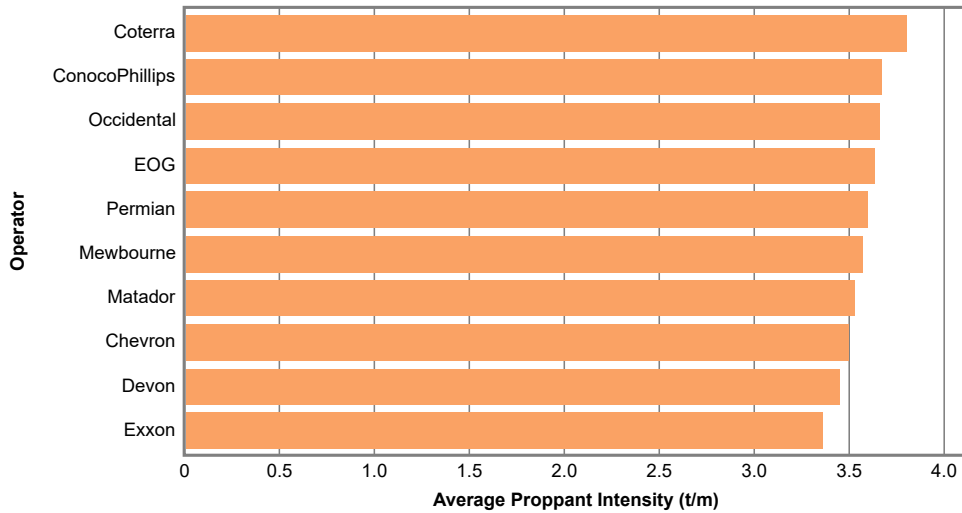
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Appendix A: Average Proppant Intensities of Top 10 Operators by Total Proppant Tonnage in Each Subject Play, 2024-25

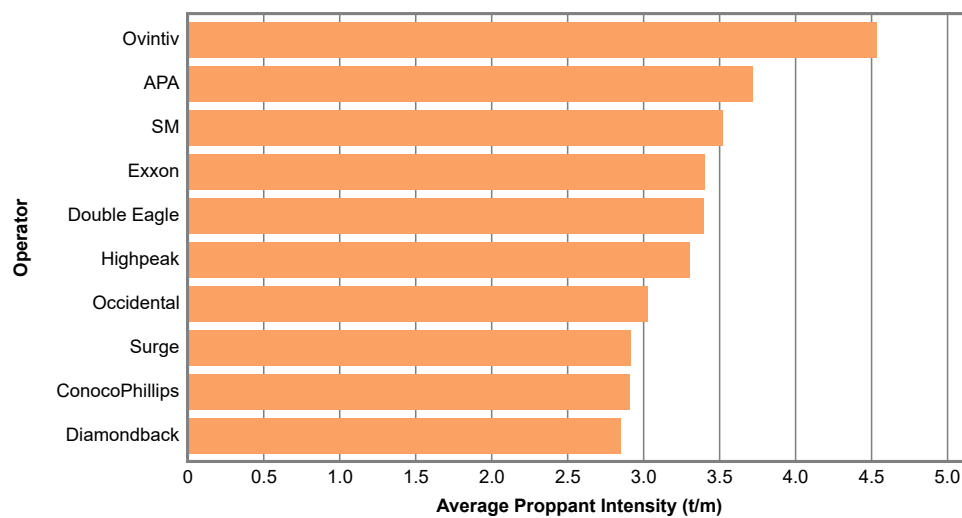
A1 2024–2025 Delaware Average Proppant Intensities



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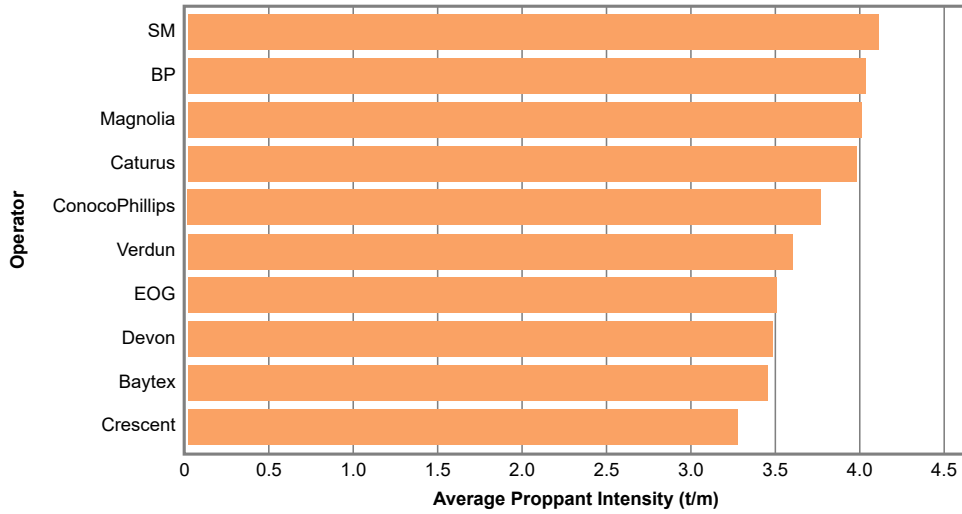
A2 2024–2025 Midland Average Proppant Intensities



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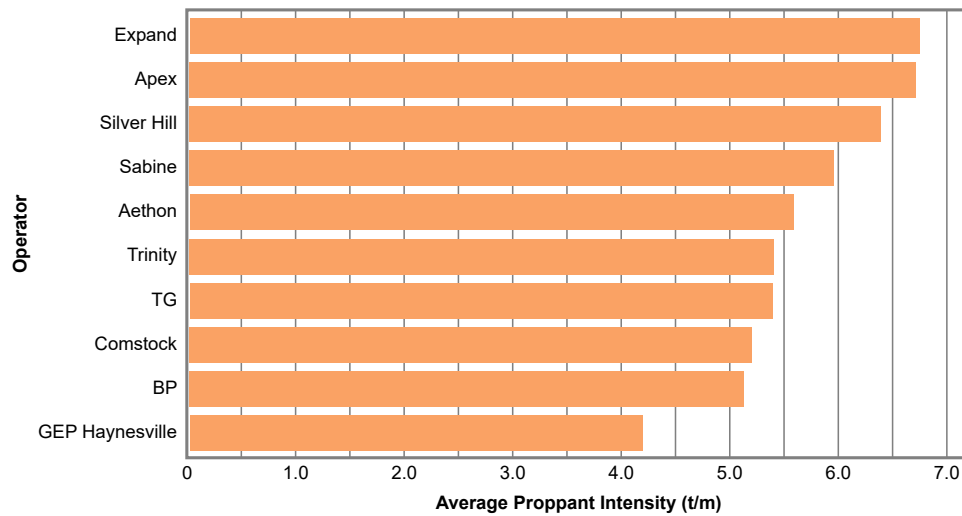
A3 2024–2025 Eagleford Average Proppant Intensities



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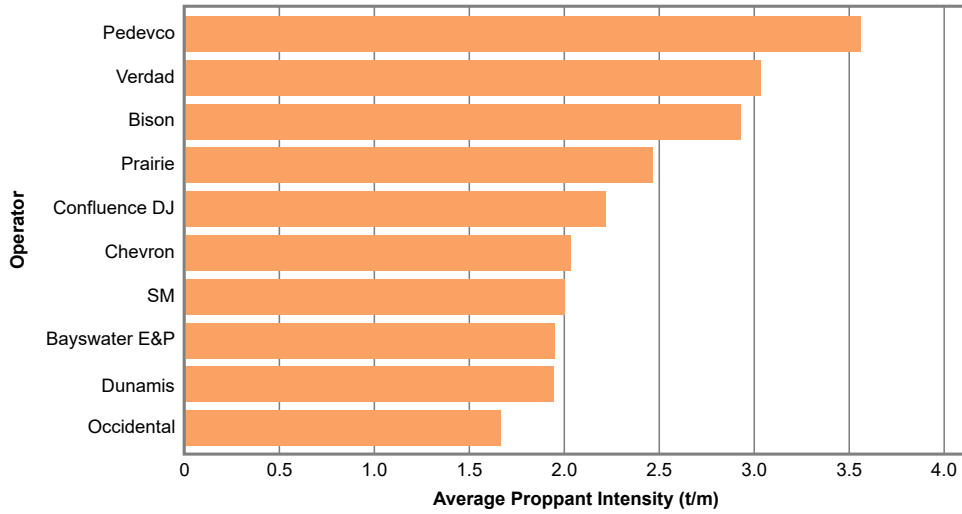
A4 2024–2025 Haynesville Average Proppant Intensities



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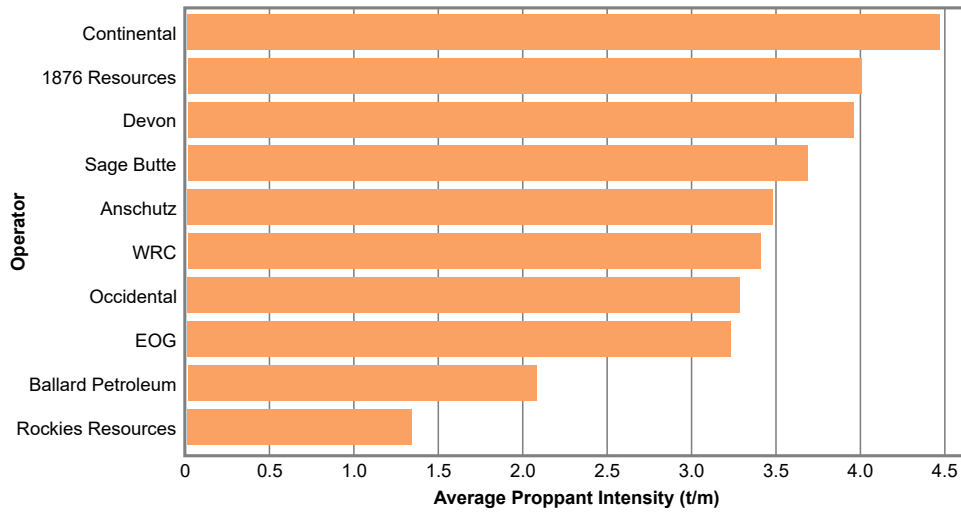
A5 2024–2025 DJ Basin Average Proppant Intensities



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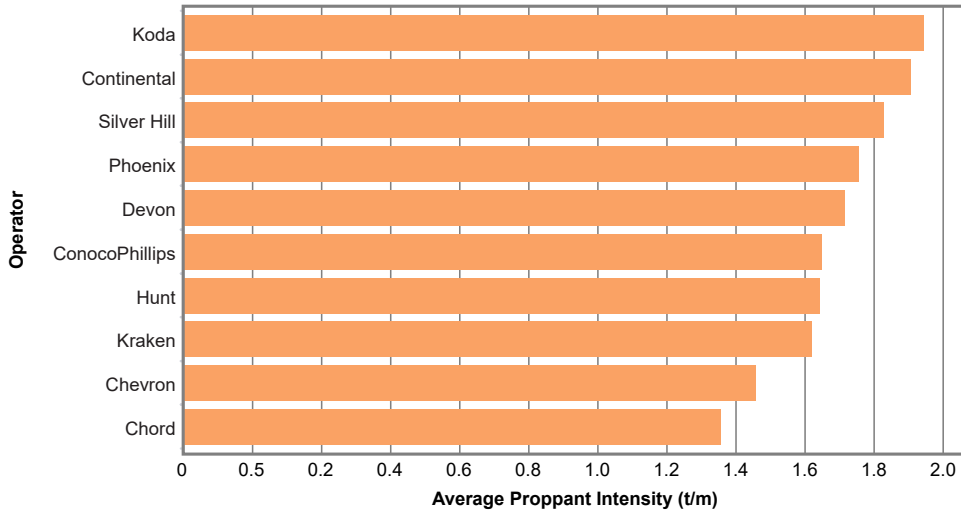
A6 2024–2025 Powder River Basin Average Proppant Intensities



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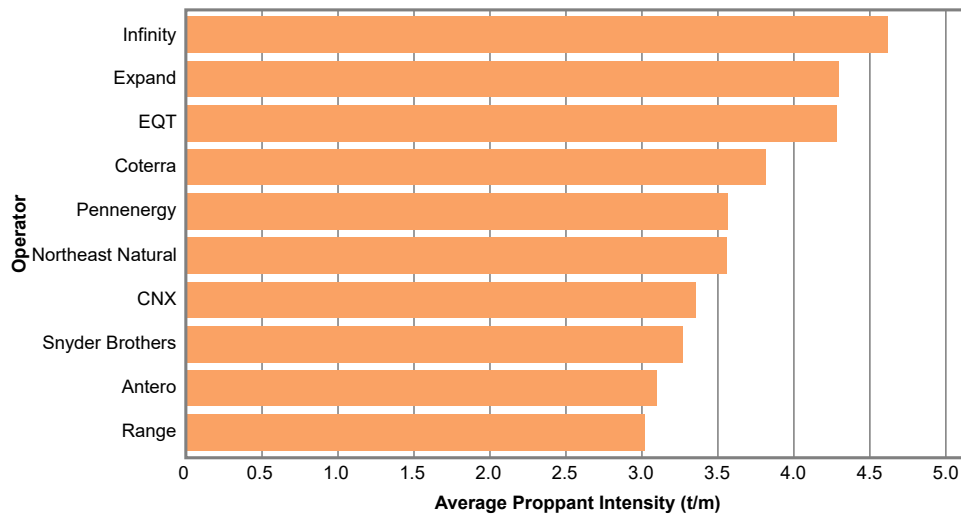
A7 2024–2025 US Bakken Average Proppant Intensities



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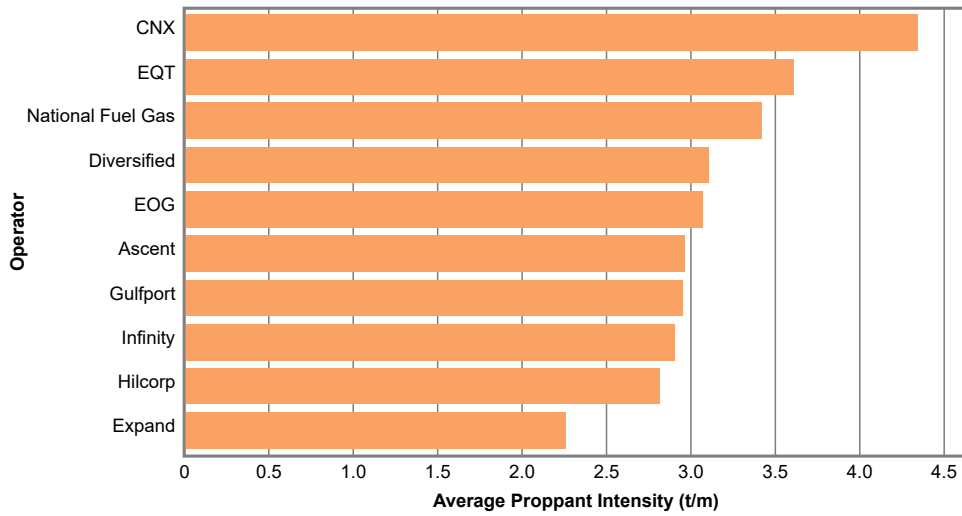
A8 2024–2025 Marcellus Average Proppant Intensities



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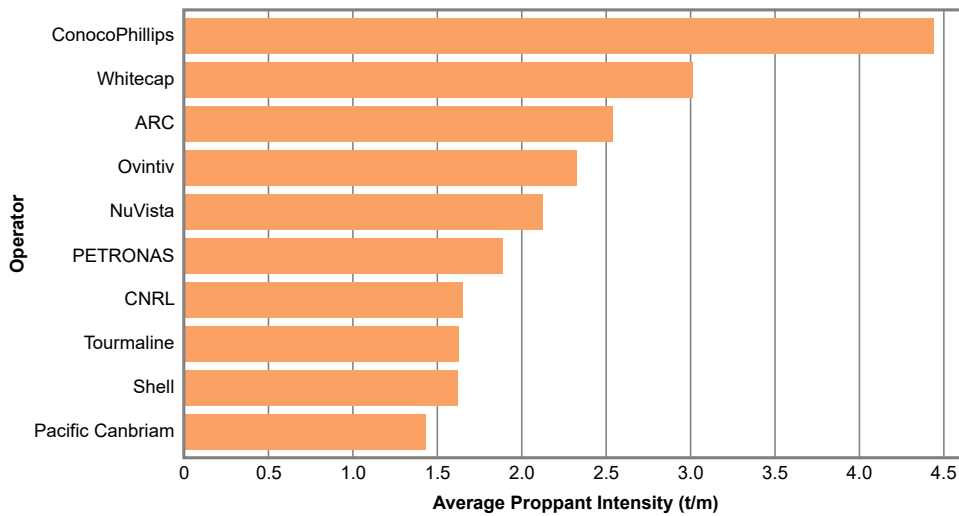
A9 2024–2025 Utica Average Proppant Intensities



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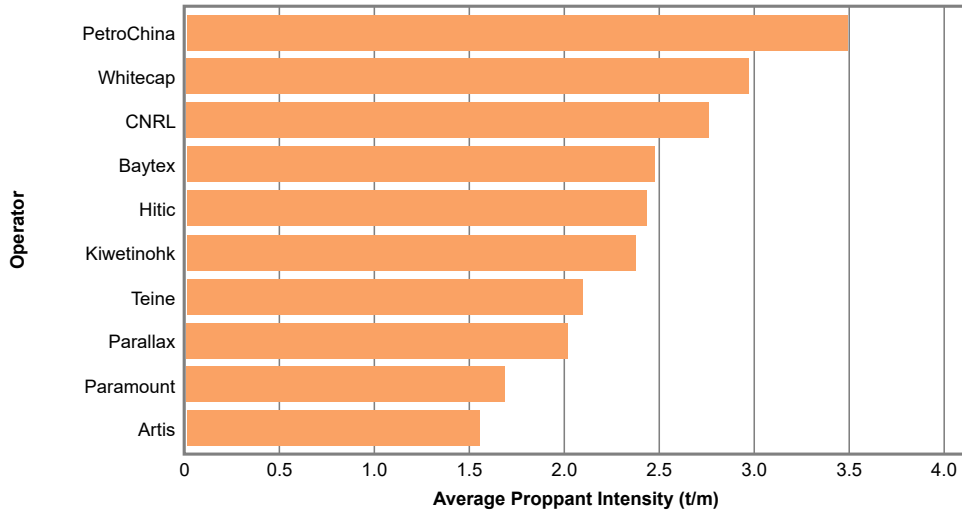
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A10 2024–2025 Montney Average Proppant Intensities



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