

Hydraulic Fracturing Market by Well Type (Horizontal Well, and Vertical Well), Technology (Plug and Perf, and Sliding Sleeve), Application (Shale gas, Tight Oil, and Tight gas) and Region - Global Trends and Forecast to 2028

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Abstracts

The global hydraulic fracturing market is estimated to grow from USD 52.1 Billion in 2023 to USD 74.4 Billion by 2028; it is expected to record a CAGR of 7.4% during the forecast period. The presence of large shale-proved reserves and increasing shale exploration and production activities globally will drive the hydraulic fracturing market in the forecasted period.

“Shale Gas: The largest segment of the hydraulic fracturing market, by application “

Based on application, the hydraulic fracturing market has been split into three types: shale gas, tight oil, and tight gas. Shale Gas holds the largest share of the hydraulic fracturing market. Natural gas that has been trapped inside shale formations is referred to as shale gas. Fine-grained sedimentary rocks called shale are potentially abundant sources of gas and oil. Shale gas is extracted via a procedure called hydraulic fracturing. There are a large number of shale reserves across the globe. The increasing demand for natural gas is attributed to driving the market of hydraulic fracturing for shale gas applications in the forecasted period.

“Horizontal segment is expected to emerge as the largest segment based on well type.”

By well type, the hydraulic fracturing market has been segmented into vertical and horizontal. For maximizing reservoir performance, horizontal wells employ a multi-

directional drilling technique with inclinations exceeding 80°. The powerful alliance of horizontal drilling and hydraulic fracturing has resulted in a remarkable surge in the rates of US crude oil, lease condensate, and natural gas production. This dynamic combination has revolutionized the energy industry by efficiently accessing hydrocarbon reserves and unlocking their potential, contributing significantly to the nation's energy output and enhancing energy security.

“By technology, the plug & perf segment is expected to be the largest market during the forecast period.”

Based on technology, the hydraulic fracturing market is segmented into plug & perf and sliding sleeves. Plug & perf technology is expected to be the largest segment during the forecast period. Plug & Perf technology is a widely used method in hydraulic fracturing. It involves placing plugs in the wellbore at specific intervals and isolating sections for fracturing. High-pressure fluid is then pumped to fracture the rock, and once completed, the plugs are removed, allowing for the flow of oil or gas.

Asia Pacific is expected to be the second-largest region in the hydraulic fracturing market.

Asia Pacific is expected to be the second-largest hydraulic fracturing market during the forecast period. The region has been segmented, by country, into China, Australia, and the Rest of Asia Pacific. The Rest of Asia Pacific includes India and Turkey. Asia Pacific is a significant contributor to the hydraulic fracturing market in the current scenario owing to a large presence of unconventional resources. The Asia Pacific region has seen rapid expansion in demand for oil and gas in recent years attributed to a growing population, increased per capita income, urbanization, and growth in the number of petrochemical refineries. According to the IEA, the region is expected to account for about 37.8% of global crude oil consumption by 2026. China is one of the major contributors to the hydraulic fracturing market, owing to a large presence of mature oilfields in the South China Sea and increasing shale production.

Breakdown of Primaries:

In-depth interviews have been conducted with various key industry participants, subject-matter experts, C-level executives of key market players, and industry consultants, among other experts, to obtain and verify critical qualitative and quantitative information, as well as to assess future market prospects. The distribution of primary interviews is as follows:

By Company Type: Tier 1- 65%, Tier 2- 24%, and Tier 3- 11%

By Designation: C-Level- 30%, Director Levels- 25%, and Others- 45%

By Region: North America- 15%, %, Europe- 25%, Asia Pacific- 35, South America- 15% and Middle East & Africa- 10%

Note: Others include product engineers, product specialists, and engineering leads.

Note: The tiers of the companies are defined on the basis of their total revenues as of 2022. Tier 1: > USD 1 billion, Tier 2: From USD 500 million to USD 1 billion, and Tier 3: The hydraulic fracturing market is dominated by a few major players that have a wide regional presence. The leading players in the hydraulic fracturing market are Halliburton (US), SLB (US), Liberty Oilfield Services LLC (US), Baker Hughes (US), and NextTier Oilfield Solutions (US).

Research Coverage:

The report defines, describes, and forecasts the global hydraulic fracturing market by type, end-user industry, application, and region. It also offers a detailed qualitative and quantitative analysis of the market. The report provides a comprehensive review of the major market drivers, restraints, opportunities, and challenges. It also covers various important aspects of the market. These include an analysis of the competitive landscape, market dynamics, market estimates in terms of value, and future trends in the hydraulic fracturing market.

Key Benefits of Buying the Report

The presence of large shale-proved reserves globally and increasing shale gas drilling activities are the main factors driving the hydraulic fracturing market. Factors such as growing concerns regarding seismic activities due to hydraulic fracturing still restrain the market. The capability of foams presents a good opportunity for players to include waterless fracking for the hydraulic fracturing market to grow, even though the health and environmental impacts of fracking chemicals are the major challenge faced by countries under hydraulic fracturing development.

Product Development/ Innovation: The hydraulic fracturing market is witnessing significant product development and innovation, driven by the growing demand

for hydraulic fracturing technology. Companies are investing in the development of advanced hydraulic fracturing that is specifically designed for the unique requirements of the industry.

Market Development: ProFrac acquired Producers Services Holdings LLC, an pressure pumping services company serving Appalachia and the Mid-Continent. ProFrac bought Producers for about \$35 million in total transaction value, according to the terms of the arrangement.

Market Diversification: NexTier Oilfield Solutions and Patterson-UTI Energy, Inc. announced that they have entered into a definitive merger agreement to combine in an all-stock merger of equals transaction. The combined company will be an industry-leading drilling and completions services provider with operations in the most active major U.S. basins.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like include Halliburton (US), SLB (US), Liberty Oilfield Services LLC (US), Baker Hughes (US), and NexTier Oilfield Solutions (US) among others in the hydraulic fracturing market.

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*Details on Business Overview, Products/Solutions/Services offered, Recent Developments, MnM View might not be captured in case of unlisted companies.

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