

Proppants Market by Type(Frac Sand, Resin-Coated Proppant, Ceramic Proppant), Application (Shale Gas, Tight Gas, Coalbedmethane & Others) and Region - Global Forecast to 2025

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Abstracts

The proppants market is estimated to be USD 7.8 billion in 2020 and is projected to reach USD 12.1 billion by 2025, at a CAGR of 9.1% between 2020 to 2025. Proppants is treated sand or engineered ceramic material, which is used to keep fractures propped open after the fracturing treatment. Different types of proppants have different mechanical strengths to withstand high closure pressures ranging from 6,000 psi to 20,000 psi. Proppants are injected into the wellbore along with water and additives with high-pressure intensity to make the fractures. They need to be permeable to gas under high pressure. Large mesh proppants have a greater permeability at low closure stresses, whereas small mesh proppants have greater permeability at high closure stresses. Proppants used in hydraulic fracturing have a direct impact on the cost of the oil & gas production output. The Proppants selection depends on the reservoir type, closure stress, depth, and stages of fracturing. The improvements in fracturing technology and new drilling techniques, increasing proppants consumption per well, innovation in proppants technologies and the growing natural gas demand to ensure energy security is driving the proppants market during the forecast period.

“Frac Sand: the fastest-growing type of proppants in the type segment.”

Frac sand is a widely used proppant. It is a naturally occurring proppant made from high purity sandstone. These proppants are mostly applicable under closure pressure of 6,000 psi. Frac sand holds a large share of the proppants market and is the preferred proppants at times when the oil prices declines and E&P operators have to reduce there production cost. The US is the largest producer and consumer of frac sand in the world

with the demand of frac sand in the US expected to increase by 7.8%, between 2020 and 2025 in terms of volume.

“Shale gas is the fastest growing application in the proppants market.”

The growth of shale gas in the US, which is the largest consumer of proppants in the world will be the key driver for the growth of proppants in shale gas application. The developments of shale gas basin in many parts of the world coupled with the growth of shale gas in China is anticipated to drive the demand of proppants in the shale gas application during the forecast period.

“APAC estimated to be the fastest-growing market for proppants.”

The domestic demand for natural gas will increase in major APAC economies due to the development of shale gas in the region. The extraction of shale gas is likely to enhance the region's energy security by allowing the countries to become less dependent on external sources. However, the development of shale gas is at the initial stage. Countries are extracting shale gas using advanced technology from their shale gas reserves, majorly driven by China and this trend makes APAC the fastest growing proppants market during the forecast period.

“Proppants market declined in 2020.”

In 2020, the proppants market declined by 27% in terms of volume, which was due to the oil price crash triggered by the COVID-19 pandemic. The unprecedented demand shock in the oil industry in 2020 led to a historic drop in the oil prices, as governments around the world closed down businesses, issued stay-at home mandates, and restricted travel. The proppants demand is estimated to recover in 2021 with the average oil price in 2021 expected to be above 50 USD/bbl.

Extensive primary interviews were conducted to determine and verify the market size for several segments and sub segments and information gathered through secondary research.

The break-up of primary interviews is given below:

By Company Type - Tier 1 – 25%, Tier 2 – 42%, and Tier 3 – 33%

By Designation – C level – 20%, Director level – 30%, and Others* – 50%

By Region – North America– 40%, Europe – 10%, APAC – 20%, South America– 10%, and Middle East & North Africa- 20%

Notes: Others include sales, marketing, and product managers.

Tier 1: >USD 500 million; Tier 2: USD 100 million–500 million; and Tier 3:

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*Details on Business overview, Products offered, Recent developments & MnM View might not be captured in case of unlisted companies.

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