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North America Solid Fuel Market Forecast to 2028 - COVID-19 Impact and Regional Analysis by Fuel Type (Petcoke/Flexicoke, Anthracite, Metallurgical Coke, and Coal)

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Abstracts

The North America solid fuel market was valued at US$ 67,465.56 million in 2022 and is projected to reach US$ 72,950.93 million by 2028; it is expected to grow at a CAGR of 1.3% from 2022 to 2028.

Rising Demand for Petcoke is Driving the North America Solid Fuel Market

Industries across the world are demanding different energy sources. The cement, steel, and power industries are generating high demand for petroleum coke (petcoke). Petcoke is cheaper than overseas coal. Owing to rising urbanization and population, demand for construction and electricity generation is increasing at an exponential rate. Petcoke is used in manufacturing building materials and generating electricity. In countries such as India, petcoke is no longer available with Reliance company for local markets. All the factors mentioned above are projected to boost the usage of petcoke, which would bolster the solid fuel market growth during the forecast period.

North America Solid Fuel Market Overview

The production of coal is rising in North America. According to U.S. Energy Information Administration in January 2023, the coal production in the US was 139.97 MMt [154.3 million short tons (MMst)] in the third quarter of 2022, with an increase of 5.9% compared to its second quarter and growth of around 4.0% compared to the third quarter of 2021. In addition, anthracite accounted for 1% of total coal mined in the US in 2021. Further, the total coal consumption in the US was 131.63 MMt (145.1 MMst) in

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the third quarter of 2022, with an increase of 23.1% compared to its second quarter. Thus, the rising coal production and consumption increase anthracite production, which boosts the solid fuel market growth in North America.

Coal is one of the largest sources of CO_2 emission. According to a report by International Energy Agency (IEA) in November 2022, IEA's Net Zero Emissions by 2050 aims to reduce the use of coal and look for newer technologies. Moreover, the region is adopting hydropower electricity generation as it is one of the clean sources of energy and extensively used for power system flexibility and resilience. For instance, according to US Department of Energy report January 2021, the hydropower capacity increased by a net of 431 MW in 2019 since 2017. The capacity increased from existing facilities, new facilities and by powering non-powered dams (NPDs) which resulted in total net growth of 1,688 MW from 2010 to 2019. Thus, adoption of hydropower across North America will result in the decline of the solid fuel market.

Coal plays an integral part in electricity generation and iron and steel production. Steel is a crucial material in consumer and industrial products, including vehicles, appliances, and other. US is one of the largest steel producers in the world. According to the US Census Bureau data, the profits from steel production increased to US$ 29.6 billion in 2021 from US$ 2.7 billion in 2020. Rising population propels the demand for steel products, which, in turn, increases steel production. The rise in steel production will boost the demand for coal in North America during the forecast period.

Exhibit: North America Solid Fuel Market Revenue and Forecast to 2028 (US$ Million)

North America Solid Fuel Market Segmentation

The North America solid fuel market is segmented into fuel type, and country.

Based on fuel type, North America solid fuel market is segmented into petcoke/flexicoke, anthracite, metallurgical coke, and coal. The metallurgical coke segment held the largest market share in 2022.

Based on country, the North America solid fuel market is segmented into the US and Canada. The US dominated the market in 2022.

Indian Oil Corp Ltd; Essar Global Fund Ltd; BP Plc; Lukoil Oil Co; Valero Energy Corp; and Phillips 66 are the leading companies operating in the North America solid fuel market.

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