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The Proppants Market 2013-2023

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Abstracts

Report Details

Proppants are an integral part of hydraulic fracturing, the process by which unconventional oil and gas resources are extracted. The promise of unconventional resources to meet the energy demands of the near future, due in part to technological improvements and multi-stage horizontal drilling techniques, will drive ever-increasing amounts of hydraulic fracturing. Proppant sales will grow as a part of this trend, expanding in value and volume terms.

Three main types of proppant for the oil and gas industry exist: ceramic proppant, resin coated proppant and frac sand. By volume, frac sand dominates proppant usage with resin coated and ceramic proppants a smaller percentage of the mix. However, the cost of the latter two products means that they challenge the market share of frac sand by value sold. The range and strength of ceramic proppants on offer means that they possess the greatest market share, by value, of proppants sold.

The outlook for unconventional oil and gas development is the primary determinant of proppant sales. The amount of hydraulic fracturing jobs performed will increase significantly in Russia and China over the next ten years. The former is aiming to exploit tight/shale oil reserves, whilst the latter harbours ambitions for all types of unconventional resources with natural gas the focus of attention. Sales of proppants destined for use in Russia is poised for take-off, whereas the difficulty in developing unconventionals in China will stack the greater increase in sales from 2018 to 2023. In addition to these two emerging markets, there are a number of other countries that will demand more proppant over the coming decade, such as Australia.

In the US and Canada, a depressed natural gas price has caused a major shift in proppant destinations away from unconventional gas plays and toward unconventional oil plays. The advent of LNG exports will play a part in a minor recovery of natural gas prices over the coming decade; this, in turn, will improve proppant sales in North America in the latter part of the forecast period as hydraulic fracturing of drier unconventional plays picks up.

Global oil prices and regional gas markets are thus also a key determinant of proppants sales for they dictate the economic viability of unconventional development. Without this viability, proppants sales will decrease. However, visiongain anticipates a combination of political will, price dynamics and forthcoming geologies to increase hydraulic fracturing of unconventional plays worldwide.

The use of multi-stage horizontal fracturing is also a boon to proppant sales as it dramatically increases the volume of proppants per well. The use of this technique will expand worldwide over the next 10 years, increasing the economics of projects and driving up demand for proppants.

Visiongain has determined that the value of the proppants market in 2013 will reach $7,467.0m.

What makes this report unique?

Visiongain consulted widely with industry experts and full transcripts from these exclusive interviews are included in the report. As such, the report has a unique blend of primary and secondary sources providing informed opinion. The report provides insight into key drivers and restraints behind the sale of proppants, identifying future growth areas and analyses leading companies. The report also provides a unique blend of qualitative analysis combined with extensive quantitative data including global, submarket and national market forecasts from 2013-2023 %lili%all highlighting key business opportunities.

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