SCOTTS INTERNATIONAL

North America Proppants - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 100 pages | Mordor Intelligence

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Report description:

The North America Proppants Market is expected to register a CAGR of greater than 7% during the forecast period.

During the COVID-19 outbreak, nationwide lockdowns around the globe, disruption in manufacturing activities and supply chains, production halts, and labor unavailability negatively impacted the market. However, the conditions started recovering in 2021, which will likely restore the market's growth trajectory during the forecast period.

Key Highlights
- Over the short term, improvements in fracking technology, increasing usage of frac sand (quantity per well), and increasing shale gas production activities are the major driving factors augmenting the growth of the market studied.
- On the flip side, environmental concerns and legislation are anticipated to restrain the growth of the target industry over the forecast period.
- Nevertheless, shifting focus toward the usage of ceramic proppants is likely to create lucrative growth opportunities for the market soon.
- The United States is the largest market for proppants. It is expected to witness the highest CAGR during the forecast period.

North America Proppants Market Trends

Frac Sand to Dominate the Market

- Frac sand proppants are the market's most widely used category for hydraulic fracturing. Frac sand proppants are made of highly pure and durable sand with round grains.
- They are predominantly made out of sandstone. Their size ranges from about 0.1 mm in diameter to 2 mm in diameter, depending on the requirement of the fracking job. A large portion of the frac sands produced in the United States is extracted from the sand mines of St. Peter Sandstone and Cambrian Jordan.
- Frac sand accounts for more than 90% of the total proppants usage in the market due to its efficiency, low cost, and availability. The market for frac sand proppants is expected to grow steadily during the forecast period.
- There is a considerable increase in demand for these proppants in the region due to numerous favourable shale basins and increasing natural gas demand. Moreover, they are exported.
- In addition, onshore North America and the Gulf of Mexico continental shelf have many oilfields that are about to reach their maturity; this is expected to further add to the proppants demand in the regions.
- Smart Sand is one of the major frac sand supply companies that currently operates two frac sand production facilities in the United States, with a a combined annual processing capacity of around 7.1 million tons. The company produced 852 thousand tons of frac sand in the first quarter of 2022.
- Overall, with the increasing number of aging fields, coupled with the increasing horizontal drilling and shale gas production activities, the amount of frac sand used per well is likely to increase during the forecast period.

United States to Dominate the Market

- The United States is one of the leading countries globally in terms of the exploration of unconventional crude oil reserves and the application of hydraulic fracturing for the same.
- According to the U.S. Geological Survey, in 2021, approximately 64% of the U.S. tonnage was used as hydraulic-fracturing sand and well packing and cementing sand.
- The quantity of oil produced from hydraulically fractured wells has been increasing significantly compared to oil produced from conventionally-fractured wells. With the growing hydraulic fracturing applications in the country, especially for shale gas and tight oil purposes, the demand for proppants has been witnessing a positive impact.
- According to the United States Energy Information Administration (EIA), shale gas and tight oil production in the United States are estimated to increase to nearly 34 trillion cubic feet by 2050, up from 24.91 trillion cubic feet in 2021.
- Frac sand is the most widely used proppant, while resin-coated and ceramic sands are used for specific applications that involve greater production depths and thermal resistance.
- With the increase in the number of mature fields and the rising energy demand, proppants used in hydraulic fracturing are expected to witness growth, owing to the exploration of unconventional resources, such as coal bed methane, tight oil, and others.
- The increase in the production from mature fields is also expected to be the reason for the significant rise in the demand for ceramic proppants.

North America Proppants Industry Overview

The North American frac sand proppants is a fragmented market. Some major players in the market (in no particular order) include Covia Holdings Corporation, Carbo Ceramics Inc., Imerys, U.S. Silica, and Saint-Gobain.

Additional Benefits:

- The market estimate (ME) sheet in Excel format

- 3 months of analyst support

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