Hydraulic fracturing is an expanding market

Through 2020, silica sand used in hydraulic fracturing (frac sand) will represent the fastest expanding market for industrial sand and account for nearly as much additional demand as the much larger glass manufacturing segment. North America will continue to dominate the hydraulic fracturing market for silica sand, accounting for over 90 percent of the 2020 segment total. However, the most rapid frac sand demand growth will be recorded in Central and South America, where Argentina’s Vaca Muerta shale basin is undergoing rapid development, spurred by extensive foreign and domestic investment.

North America & Asia/Pacific to show most rapid gains

Both North America and the Asia/Pacific region will post market increases over five percent annually through 2020. In North America, gains will primarily be spurred by healthy sales growth in hydraulic fracturing applications. In recent years, an explosion in horizontal drilling activity fueled double-digit gains. As drilling began to slow in 2014 and 2015, oil and gas drilling firms used more sand per well to stimulate greater productivity out of existing wells. This trend will continue bolstering frac sand demand through 2020.

Regulatory developments may affect suppliers

Two important regulatory developments are expected to affect silica sand suppliers in the near term. In the US, the Occupational Health and Safety Administration (OSHA) has halved the permissible exposure limit for respirable crystalline silica. Meanwhile, in Western Europe the European Commission announced in December 2015 that it had grown regionwide recycling targets, with 75 percent of glass expected to be recycled by 2025. Both the more stringent silica dust exposure limit and the European recycling targets are projected to have a modest negative impact on demand. These regulations are expected to accelerate the ongoing trends of reduced abrasive sand-blasting and increased glass recycling in the developed parts of the world.

Study coverage

This study reviews the worldwide industrial silica sand market. It presents historical data (2005, 2010 and 2015) plus forecasts (2020 and 2025) for supply and demand, as well as demand by market (hydraulic fracturing, foundry, glass, building products, chemicals, other) for six regions and 19 countries. The study also considers key market environment factors, assesses the industry structure and analyzes company market share.
World Industrial Silica Sand

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China: Silica Sand Markets & Suppliers

Silica sand consumption in China is projected to increase 5.5 percent per year through 2020 to 109 million metric tons, valued at $3.6 billion. While this will represent a more modest pace than that recorded during the 2010-2015 period, China’s silica sand market will nevertheless continue to outstrip par with gains in the US.

The fastest sales increases will be recorded in consumption of frac sand, albeit from a very small market base. The negative environmental impact of coal dependency and the country’s growing energy demand necessitate continued investment in shale gas drilling activity. Nevertheless, a number of headwinds exist, preventing more rapid development. First, low oil and gas prices continuing into the near term will reduce the return on investment that producers can expect, causing a number of foreign firms to withdraw their support. Second, China’s shale gas formations are more difficult to access than those in the US, further raising investment costs. Additionally, ceramic proppants are favored by drillers in China, limiting sales opportunities for silica sand suppliers. As a result, frac sand will remain a small portion of the country’s market for the near term, accounting for only three percent of 2020 national silica sand consumption.

In absolute terms, the most demand growth is expected in the already sizable flat glass and fiberglass industries. In addition to the automotive and architectural glass markets prominent across the world, the rapidly expanding market for photovoltaic solar panels will also fuel flat glass silica sand consumption. Furthermore, China’s position as a global supplier of a variety of manufactured goods will drive silica sand demand for all types of glass items, from simple mirrors to electronic display screens.

This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

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**World Flat Glass**
Global flat glass demand is forecast to rise 5.0% per year through 2020 to 9.6 billion square meters, with a value of $94 billion. The Asia/Pacific region was the largest in 2015, led by China, the top national market worldwide. The architectural market will remain the largest, though stronger growth is forecast in markets such as electronic displays and solar energy. This study reviews the $72.2 billion flat glass industry, with supply and demand forecasts by market for 2020 and 2025 in 6 regions and 21 countries. The study also details industry structure and evaluates market share. #3449 August 2016 $6000

**World Activated Carbon**
Worldwide demand for activated carbon -- including powdered, granular, and other types -- will rise 6.0 percent per year to 1.9 million metric tons in 2020. China and other developing countries in the Asia/Pacific and Africa/Mideast regions will post the best growth based on infrastructure improvements and higher environmental standards. Powdered activated carbon will see the best growth. The study details the global 1.4 million metric ton AC market with forecasts for 2020 and 2025 by type. The study also evaluates company market share and profiles global players. #3404 April 2016 $6500

**World Specialty Silicas**
World demand for specialty silicas is forecast to rise 5.0 percent per year to 3.5 million metric tons in 2020, valued at $8.8 billion. The tire rubber market will grow the fastest. The most rapid gains for specialty silicas will occur in industrializing countries in Asia, since the region dominates global rubber production. This study provides historical demand data (2005, 2010, 2015) plus forecasts (2020, 2025) by product and market in 6 regions and 16 countries. The study also considers market environment factors, evaluates company market share, and profiles global industry competitors. #3407 April 2016 $6400

**Specialty Silicas**
Demand for specialty silicas in the US is forecast to rise 4.7 percent annually to $2.1 billion in 2019. Precipitated silica will be the largest and fastest growing product segment, driven by robust gains in the large tire rubber sector, as well as in coatings and inks. Rubber will also be the fastest growing market overall, with tire rubber outpacing the nontire rubber segment. This study analyzes the $1.7 billion US specialty silica industry, with forecasts for 2019 and 2024 by product and market. The study also evaluates company market share and profiles US industry participants. #3368 January 2016 $5200

Freedonia’s methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

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- Consumer Goods
- Energy & Petroleum
- Industrial Components
- Healthcare & Life Sciences
- Machinery & Equipment
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