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Hydraulic modeling and real-time optimization of drilling fluids: A future perspective

Kingsley Onyedikachi Omomo [1, *], Andrew Emuobosa Esiri [2] and Henry Chukwuemeka Olisakwe [3]

[1] *TotalEnergies Limited, Nigeria (c/o Benmaris Limited).*
[2] *Independent Researcher, Houston Texas, USA.*
[3] *Department of Mechanical Engineering, Nnamdi Azikiwe University, Awka, Nigeria.*

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Abstract

The evolution of drilling operations in the oil and gas industry has highlighted the need for more efficient and adaptive management of drilling fluids, particularly in complex well environments. This paper presents a comprehensive review of hydraulic modeling and real-time optimization of drilling fluids, focusing on future perspectives and industry implications. Hydraulic modeling plays a crucial role in predicting pressure, fluid flow, and wellbore stability, while real-time optimization, powered by advanced sensors, AI, and machine learning, enables dynamic fluid management. The integration of these technologies allows for continuous monitoring and adjustment of fluid properties, improving efficiency, reducing downtime, and preventing formation damage. Future technological advancements, including digital twins and enhanced downhole sensors, are expected to improve well performance and cost-efficiency further. Strategic recommendations for industry adoption include investment in advanced technologies and further research into hydraulic modeling and real-time optimization for complex wells.

Keywords: Hydraulic modelling; Real-time optimization; Drilling fluids; Artificial intelligence; Machine learning; Wellbore stability

1 Introduction

In the oil and gas industry, effective drilling fluid management is critical in ensuring the success and efficiency of drilling operations. Drilling fluids, often referred to as the "blood" of drilling operations, are used to cool the drill bit, carry cuttings to the surface, and maintain wellbore stability (Njuguna et al., 2022). However, as well designs grow more complex, managing these fluids in real-time has become increasingly challenging. Hydraulic modeling offers a solution by providing accurate predictions of pressure, flow rates, and other essential variables to optimize fluid performance throughout the drilling process (Mohamed, Salehi, & Ahmed, 2021).

Hydraulic modeling involves the simulation of fluid flow dynamics within the wellbore. This allows operators to predict and control various factors such as pressure distribution, fluid velocity, and the risk of formation damage (Mohamed et al., 2021). By integrating these models with real-time data acquisition systems, it is possible to optimize the management of drilling fluids dynamically. Real-time optimization can improve well performance by reducing fluid loss, preventing wellbore instability, and minimizing the potential for formation damage (Krishna, Ridha, Vasant, Ilyas, & Sophian, 2020).

The primary objective of this paper is to conceptualize a system that combines hydraulic modeling with real-time optimization techniques to enhance the performance of drilling fluids, particularly in complex well environments. This paper aims to explore the challenges associated with traditional drilling fluid management, outline the key concepts of

* Corresponding author: Kingsley Onyedikachi Omomo

hydraulic modeling, present a framework for real-time optimization, and discuss future perspectives for this innovative approach.

2 Current Challenges in Drilling Fluid Management

2.1 Issues Related to Fluid Loss and Formation Damage

One of the most persistent challenges in drilling fluid management is fluid loss, a phenomenon that occurs when drilling fluids seep into the formation through cracks or porous rocks. Fluid loss can result in several adverse consequences, including increased operational costs, delays in drilling, and potential environmental risks. When fluid is lost to the formation, it becomes necessary to pump additional fluid into the well, increasing material costs and leading to higher energy consumption. Furthermore, severe fluid loss can compromise wellbore stability, leading to complications such as well collapse or the need for remedial work, further escalating costs and operational delays (Asadimehr, 2024).

Formation damage is another critical issue that arises from poor drilling fluid management. This occurs when the drilling fluid invades the reservoir rock, altering its permeability and reducing the well's production capacity (Guo et al., 2020). Formation damage typically results from the interaction between the fluid and the formation, where fine particles from the fluid block the pore spaces of the reservoir rock, or chemical reactions between the fluid and the formation materials cause swelling or degradation. This can permanently reduce the well's productivity, even after production begins, making it a costly and irreversible consequence of suboptimal fluid management (Azdarpour, 2022).

Moreover, the balance between fluid loss and formation damage is delicate and difficult to manage. The drilling fluid needs to be formulated to prevent excessive fluid loss, but without causing formation damage. Traditional drilling fluid management techniques often rely on surface-level measurements to monitor fluid properties, which do not always indicate downhole conditions. This results in a limited ability to fine-tune fluid properties in real time, making it difficult to respond to changes in well conditions as they occur (M. A. Ibrahim, Jaafar, Yusof, & Idris, 2022).

2.2 Challenges in Handling Complex Wells with Conventional Drilling Fluid Systems

As the oil and gas industry pushes the boundaries of drilling technology, the need to drill more complex wells has increased significantly. Wells are now drilled deeper, with extended-reach lateral sections and through more challenging geological formations. This evolution in well design has exposed the limitations of conventional drilling fluid management systems (Elgaddafi, Soriano, Ahmed, & Osisanya, 2021).

Extended-reach wells and deepwater wells pose unique challenges in terms of fluid management. In extended-reach wells, the long horizontal sections increase the risk of differential sticking, where the drill string becomes stuck against the wellbore due to high fluid pressures. This can result in non-productive time (NPT), as the rig must stop drilling while the stuck pipe is freed. Additionally, deepwater wells often traverse multiple pressure regimes, requiring precise control over drilling fluid density and pressure to avoid wellbore instability and kick events (uncontrolled flow of formation fluids into the wellbore) (El Sabeh, Gaurina-Međimurec, Mijić, Medved, & Pašić, 2023).

Temperature variations also pose significant challenges in complex wells. As drilling operations extend deeper into the earth, the temperature gradient changes, affecting the drilling fluid's rheology (flow behavior) (Xiao et al., 2022). Higher temperatures can cause the fluid to thin, reducing its ability to carry cuttings to the surface, while lower temperatures can cause the fluid to thicken, increasing the risk of pressure spikes and fluid loss. Conventional drilling fluid systems struggle to adapt to these rapidly changing conditions, leading to inefficiencies and increased operational risks (Zhang et al., 2021).

Additionally, the heterogeneity of geological formations in complex wells makes it difficult to predict how the fluid will interact with the formation. Traditional drilling fluid systems are not equipped to handle the variability in formation types, fluid pressures, and temperature gradients encountered in these wells. As a result, drilling fluid properties that work well in one section of the well may be ineffective or even harmful in another section. This inability to adapt fluid properties in real time further exacerbates the risks of fluid loss and formation damage, increasing the likelihood of costly well interventions (Viswanathan et al., 2022).

2.3 The Need for More Adaptive and Real-Time Approaches in the Industry

Given the challenges outlined above, there is a clear and growing need for more adaptive and real-time approaches to drilling fluid management. Traditional methods, which rely on static formulations and surface-level measurements, are no longer sufficient to manage the complexities of modern well designs. Based on actual downhole conditions, the industry is moving toward more dynamic systems that can monitor and adjust fluid properties in real time (Ezeh, Ogbu, Ikevuje, & George, 2024; Ochulor, Sofoluwe, Ukato, & Jambol, 2024).

Real-time optimization of drilling fluids involves the continuous monitoring of well conditions using advanced sensors and data acquisition systems, combined with hydraulic modeling and optimization algorithms (N. Liu, Zhang, Gao, Hu, & Duan, 2021). By incorporating real-time data into the hydraulic model, operators can adjust fluid properties dynamically to prevent fluid loss, maintain wellbore stability, and minimize formation damage. This approach allows for greater flexibility in managing drilling fluids, as the system can respond to changes in well conditions almost instantaneously (Elmgerbi, Chuykov, Thonhauser, & Nascimento, 2022).

The integration of artificial intelligence (AI) and machine learning (ML) into real-time fluid management systems offers even greater potential for optimization. AI-driven systems can analyze vast amounts of historical and real-time data to predict the best fluid properties for a given wellbore, making adjustments automatically without the need for human intervention. This not only improves efficiency but also reduces the risk of human error, enhancing the overall safety and productivity of the drilling operation (Lowe, Qin, & Mao, 2022).

Moreover, the development of cloud-based data processing systems allows for the seamless integration of real-time data from multiple sources, enabling operators to monitor multiple wells simultaneously and make informed decisions about fluid management. These systems can handle the large volumes of data generated during drilling operations and process it quickly enough to provide real-time recommendations for fluid optimization (Soudagar et al., 2024).

3 Hydraulic Modeling for Drilling Fluids: Key Concepts

3.1 Hydraulic Modeling Techniques and Their Role in Drilling

Hydraulic modeling refers to the simulation of fluid dynamics within a wellbore to predict the behavior of drilling fluids. This process involves complex mathematical calculations that account for various parameters such as fluid density, viscosity, pressure, temperature, and flow rates. By simulating these factors, hydraulic models can offer insights into how drilling fluids interact with the wellbore and surrounding formations, allowing operators to make informed decisions about fluid management (Sharma & Kudapa, 2021).

In drilling operations, hydraulic modeling is typically used to optimize the performance of drilling fluids, helping to maintain wellbore stability, prevent kicks (uncontrolled influx of formation fluids), and ensure efficient cuttings removal. Operators can adjust the fluid's composition and properties to achieve the desired performance outcomes by accurately modeling how the fluid will behave under expected well conditions. For example, suppose a well is expected to encounter high-pressure zones. In that case, the model can help determine the appropriate fluid density to prevent well control issues (Mohamed et al., 2021).

Hydraulic models are also valuable for preempting potential problems in drilling operations. Through simulations, operators can identify areas in the wellbore where fluid loss or wellbore collapse is likely to occur. With this information, preventive measures, such as adjusting the fluid's viscosity or flow rate, can be taken before the problem manifests. This proactive approach minimizes costly downtime and reduces the likelihood of operational failures (Mohamed et al., 2021).

Several hydraulic modeling techniques are used in drilling operations, including steady-state and transient models. Steady-state models assume that fluid properties and flow conditions remain constant over time, providing a simplified view of fluid behavior in stable conditions. In contrast, transient models account for time-dependent changes in fluid properties, offering a more dynamic and accurate representation of how the drilling fluid will behave as conditions in the well change (AlBahrani, Alsheikh, Wagle, & Alshakhouri, 2022).

3.2 How Hydraulic Modeling Can Predict Pressure, Fluid Flow, and Wellbore Stability

One of the primary benefits of hydraulic modeling is its ability to predict pressure distribution throughout the wellbore. Pressure management is critical in drilling operations because improper pressure control can lead to serious problems like blowouts (uncontrolled release of oil or gas) or wellbore collapse. Hydraulic models allow operators to calculate the pressure profile along the entire length of the well, ensuring that the drilling fluid maintains the appropriate balance between the formation pressure and the hydrostatic pressure exerted by the fluid column (A. Ibrahim, 2021).

In addition to predicting pressure, hydraulic modeling is essential for understanding fluid flow dynamics within the wellbore. Drilling fluid must be carefully managed to ensure that it flows efficiently through the well, carrying cuttings to the surface and preventing blockages (Mahmoud et al., 2020). Hydraulic models help determine the optimal flow rate for the drilling fluid, accounting for factors like wellbore diameter, fluid viscosity, and pump pressure. By optimizing the fluid flow, operators can minimize the risk of cuttings buildup in the wellbore, which can cause operational delays and increase the risk of wellbore instability (Al-Shargabi et al., 2023).

Another critical function of hydraulic modeling is predicting wellbore stability. Wellbore stability refers to the ability of the well to maintain its structural integrity during drilling operations. If the wellbore becomes unstable, it can collapse or allow drilling fluids to invade the formation, causing fluid loss or damage (N. Liu et al., 2021). Hydraulic models help assess the mechanical forces acting on the wellbore, allowing operators to make adjustments to the drilling fluid's properties (e.g., increasing its density or adjusting its chemical composition) to maintain stability. For example, in wells drilled through weak or fractured formations, hydraulic models can help prevent wellbore collapse by suggesting adjustments to the fluid's pressure or viscosity (A. Ibrahim, 2021).

Hydraulic modeling becomes even more crucial in more complex wells, such as those drilled in deepwater environments or through highly variable geological formations. These wells often encounter multiple pressure regimes and temperature gradients, making it difficult to predict fluid behavior using traditional methods. Hydraulic models can simulate these complex conditions, providing operators with valuable information to optimize fluid properties and ensure safe, efficient drilling (Epelle & Gerogiorgis, 2020).

3.3 Integration of Modeling with Real-Time Data Acquisition Systems

While hydraulic modeling is a powerful tool, its effectiveness is significantly enhanced when integrated with real-time data acquisition systems. Traditionally, hydraulic models have relied on static inputs, such as surface measurements and historical data, to simulate fluid behavior. However, downhole conditions can change rapidly during drilling, and relying solely on static models may lead to suboptimal fluid management decisions (Park et al., 2020).

Real-time data acquisition systems allow operators to continuously monitor well conditions and feed this data into the hydraulic model, updating the model's predictions in real time. These systems use a network of sensors placed throughout the wellbore to measure critical parameters such as pressure, temperature, flow rate, and fluid density. The data collected by these sensors is transmitted to surface control systems, where it can be processed and integrated with the hydraulic model (Elmgerbi et al., 2022).

This real-time feedback loop allows for the dynamic optimization of drilling fluid properties. For example, suppose the sensors detect a sudden increase in pressure or fluid loss. In that case, the hydraulic model can quickly analyze the situation and recommend adjustments to the fluid's properties, such as increasing its viscosity or changing its flow rate. This immediate response helps prevent potential problems like wellbore collapse or kicks, improving the overall safety and efficiency of the drilling operation (J. Liu et al., 2024).

In addition to real-time monitoring, modern hydraulic modeling systems can also incorporate artificial intelligence (AI) and machine learning (ML) algorithms to enhance predictive capabilities. By analyzing vast amounts of historical and real-time data, AI-driven models can identify patterns and trends that may not be apparent using traditional methods. These models can then make more accurate predictions about fluid behavior under different conditions, enabling even greater optimization of drilling fluid properties (Jambol, Ukato, Ozowe, & Babayeju, 2024; Ogbu, Ozowe, & Ikevuje, 2024; Ukato, Jambol, Ozowe, & Babayeju, 2024).

Moreover, cloud-based data processing platforms have made integrating real-time data from multiple sources, including hydraulic models, into a unified system easier. This integration allows operators to monitor several wells simultaneously, compare real-time data against hydraulic model predictions, and make informed decisions about fluid management in real time. These advancements in data acquisition and processing are transforming hydraulic modeling from a static, predictive tool into a dynamic, adaptive system that responds to changes in well conditions as they occur (Akanbi & Masinde, 2020).

4 Real-Time Optimization of Drilling Fluids

4.1 Framework for Real-Time Optimization Based on Hydraulic Modeling

At the core of real-time optimization lies hydraulic modeling, a powerful tool for simulating the behavior of drilling fluids under various downhole conditions. However, the dynamic nature of drilling operations often presents challenges that traditional static models cannot address. Real-time optimization builds on the predictive capabilities of hydraulic modeling by continuously feeding real-time data from downhole sensors into the model, allowing for adjustments in fluid properties as conditions change.

The conceptual framework for real-time optimization consists of three main components: data acquisition, modeling and simulation, and optimization and control. Data acquisition involves the use of sensors placed in the wellbore to monitor critical parameters such as pressure, temperature, fluid flow, and density. These sensors provide real-time information about the well's condition, which is then transmitted to surface control systems.

Modeling and simulation utilize this real-time data to update hydraulic models, accurately representing downhole conditions. The model simulates fluid behavior and predicts the impact of any changes in well conditions, offering insights into how the drilling fluid should be adjusted.

Optimization and control involve making adjustments to the fluid properties based on the model's predictions. This could include changing the fluid's density, viscosity, or flow rate to prevent issues like fluid loss, formation damage, or wellbore instability. The adjustments are made in real time, ensuring that the fluid is always optimized for the current well conditions.

This framework provides a closed-loop system where data is continuously fed into the model, predictions are made, and real-time adjustments are implemented, creating a dynamic and adaptive fluid management process. The integration of hydraulic modeling with real-time data acquisition ensures that fluid properties are constantly optimized, reducing the risk of operational inefficiencies and failures.

4.2 Use of Advanced Sensors, AI, and Machine Learning for Dynamic Fluid Management

The success of real-time optimization depends heavily on the technologies used to collect and analyze data. One of the most important elements in this framework is the deployment of advanced sensors in the wellbore. These sensors provide continuous feedback on key parameters such as pressure, temperature, and fluid flow, which are critical for assessing the condition of the well. Unlike traditional systems that rely on surface measurements, these downhole sensors offer a more accurate and immediate understanding of the well's environment.

In addition to sensors, artificial intelligence (AI) and machine learning (ML) transform how data is processed and used in fluid management. AI and ML algorithms can analyze vast amounts of data from multiple sources—such as historical well data, real-time sensor readings, and hydraulic model predictions—to identify patterns and trends that may not be immediately apparent to human operators. These technologies enable more precise predictions about how drilling fluids will behave under different conditions and provide recommendations for optimal adjustments. For example, AI systems can detect subtle changes in pressure or temperature that indicate an impending problem, such as fluid loss or wellbore instability. Based on these predictions, the system can automatically adjust fluid properties—such as increasing viscosity or altering flow rate—to prevent the issue from escalating. This automated decision-making process reduces the reliance on manual interventions and allows for faster responses to changing conditions (Lowe et al., 2022).

Machine learning algorithms are particularly valuable because they can improve over time as they analyze more data. As more wells are drilled and more data is collected, ML systems can learn from past experiences and refine their predictions, becoming increasingly accurate in identifying the optimal fluid properties for different well conditions. This continuous learning process ensures that the system is always evolving and improving its ability to manage drilling fluids in real time (Ogbu, Iwe, Ozowe, & Ikevuje, 2024; Onita & Ochulor, 2024).

The integration of cloud-based systems allows for the simultaneous processing of large volumes of real-time data from multiple wells. This is especially useful in large-scale operations where multiple rigs are in operation at the same time. Cloud computing enables operators to access and analyze data from different locations, ensuring that decisions about fluid management are based on a comprehensive understanding of the entire operation (Priyanka, Thangavel, & Gao, 2021).

4.3 Potential Benefits

The implementation of real-time optimization for drilling fluids offers numerous benefits that can significantly enhance the efficiency and effectiveness of drilling operations. One of the most immediate benefits is the improvement in operational efficiency. By dynamically adjusting fluid properties in real time, operators can optimize drilling performance, reduce non-productive time (NPT), and ensure that the drilling process proceeds as smoothly as possible. For example, real-time optimization can prevent issues like differential sticking or excessive fluid loss, both of which can cause costly delays and equipment damage (Ozowe, Sofoluwe, Ukato, & Jambol, 2024; Sofoluwe, Ochulor, Ukato, & Jambol, 2024).

Another major benefit of real-time optimization is the reduction of downtime. Downtime in drilling operations often occurs when unexpected issues arise, such as a sudden change in pressure or the occurrence of a kick (an influx of formation fluids into the wellbore). Traditional fluid management systems may not be able to respond quickly enough to these changes, resulting in equipment failure or well control issues that require the suspension of drilling activities. With real-time optimization, however, sensors can detect these changes as they happen, and the system can make immediate adjustments to the fluid properties, preventing the situation from worsening. This proactive approach reduces the likelihood of unplanned downtime, improving the operation's overall productivity.

Perhaps one of the most significant advantages of real-time optimization is its ability to prevent formation damage. Formation damage occurs when drilling fluids invade the reservoir rock, reducing its permeability and diminishing the well’s production capacity. Real-time optimization ensures that the fluid properties are always balanced to maintain wellbore stability while minimizing the risk of fluid invasion into the formation. By continuously monitoring well conditions and adjusting fluid properties in response to changes, real-time optimization can help prevent long-term damage to the reservoir, improving the well’s overall productivity (Syed, Alshamsi, Dahaghi, & Neghabhan, 2022).

Additionally, the use of AI and ML in real-time optimization enhances the predictive capabilities of fluid management systems. These technologies can analyze trends and patterns in real-time data to predict potential problems before they occur, allowing for preventive action rather than reactive solutions. This not only reduces operational risks but also improves safety. Control issues like blowouts are less likely to occur when the fluid system is constantly monitored and optimized (Lowe et al., 2022).

5 Conclusion

As drilling operations become increasingly complex, hydraulic modeling and real-time optimization will become more crucial. Future developments will likely see hydraulic models becoming more sophisticated, incorporating advanced physics and geological data to create more accurate simulations of fluid behavior under extreme downhole conditions. These models can simulate a wider range of scenarios, including high-pressure, high-temperature (HPHT) environments and unconventional reservoirs, which require precise fluid management.

The continued integration of artificial intelligence (AI) and machine learning (ML) into hydraulic modeling will also enhance predictive capabilities, allowing for real-time adjustments to drilling fluids based on downhole data. As AI and ML algorithms become more refined, they can process and analyze data faster and more accurately, enabling even more responsive fluid management systems. These advancements will help prevent issues like wellbore instability, fluid loss, and formation damage, which can lead to costly operational delays. Another key trend will be the increased adoption of cloud-based platforms that enable real-time data processing and sharing across multiple rigs and locations. This will allow operators to monitor and optimize drilling fluids in real time, regardless of geographical constraints, improving the coordination and efficiency of drilling operations on a global scale.

Several technological advancements are expected to revolutionize hydraulic modeling and real-time optimization further. One such advancement is the development of downhole sensors that are more accurate, durable, and capable of operating in extreme conditions. These sensors will provide more detailed and reliable real-time data, allowing for better decision-making regarding fluid management.

Another major innovation is the use of digital twins—virtual replicas of physical wells that can simulate various scenarios and predict outcomes before changes are made to the actual well. By creating a digital twin of a well, operators can test different drilling fluid formulations and flow rates without risking real-world consequences. This technology will significantly improve decision-making and reduce costs by enabling operators to experiment with various strategies before committing resources.

These advancements are expected to lead to substantial cost savings by minimizing downtime, reducing non-productive time (NPT), and preventing equipment damage or well control issues. The real-time optimization of drilling fluids will also enhance well performance, ensuring that wells are drilled more efficiently and with fewer interruptions.

5.1 Strategic Recommendations for Industry Adoption and Further Research

Several strategic steps should be taken to benefit the oil and gas industry fully from these advancements. First, companies should invest in developing and deploying advanced sensor technology. Real-time optimization success depends on the data's accuracy and reliability, so investing in next-generation sensors is critical.

Second, the industry should embrace AI and machine learning as central components of future fluid management systems. To do this, operators must invest in data infrastructure that supports collecting and analyzing large volumes of data. Training and upskilling the workforce to understand and use these technologies effectively will also be essential.

Finally, further research and development in hydraulic modeling and real-time optimization should be prioritized. This includes improving existing models and exploring new applications, such as adapting these technologies for use in unconventional reservoirs and deepwater environments.

Compliance with ethical standards

Disclosure of conflict of interest

No conflict of interest to be disclosed.

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