

Middle East & Africa Oil & Gas Midstream Market, By Pipeline Transportation (Crude Oil, Natural Gas, Product Pipelines), By Storage Solutions (Tank Farms, Underground Storage, Floating Storage), By Midstream Services (Inspection & Maintenance, Safety & Compliance) By Country, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

Market Overview

The Middle East & Africa Oil & Gas Midstream Market was valued at USD 11.10 billion in 2024 and is projected to reach USD 16.87 billion by 2030, growing at a CAGR of 7.07% during the forecast period. This segment plays a pivotal role in transporting, storing, and marketing crude oil, natural gas, and refined petroleum products. Functioning as the crucial intermediary between upstream extraction and downstream refining and distribution, the midstream sector ensures the seamless movement of energy resources from production sites to processing and end-user destinations.

Key midstream operations include pipeline transportation, storage terminals, and LNG facilities, which support both domestic energy security and international supply chains. With advancements in infrastructure and growing investments in pipelines, tank farms, and LNG logistics, the sector continues to provide the necessary backbone for oil and gas flow across the region. Given its strategic significance, midstream development is instrumental in stabilizing energy markets and mitigating supply disruptions.

Key Market Drivers

Increasing Energy Demand and Supply Needs

The surging global demand for energy, especially from developing regions, is a major factor driving growth in the Middle East and Africa oil and gas midstream market. The MEA region, home to vast oil and natural gas reserves, plays a central role in fulfilling global energy requirements. This growing energy demand—driven by industrialization and urbanization in Asia and Europe—has heightened the importance of efficient midstream systems to ensure the smooth transport of energy resources from extraction sites to refineries and international markets.

Significant projects like the East African Crude Oil Pipeline (EACOP) and the Trans-Saharan Gas Pipeline reflect the region's efforts to enhance regional energy connectivity. Moreover, the global transition toward cleaner fuels is accelerating the demand for natural gas, positioning the MEA region as a key LNG supplier. Countries are increasingly focusing on gas transportation and storage infrastructure to support this transition. According to the International Energy Agency (IEA), energy demand in Africa alone is expected to rise by over 30% by 2030, reinforcing the need for advanced and scalable midstream facilities across the region.

Key Market Challenges

Geopolitical Instability and Security Risks

Geopolitical volatility and security threats pose a considerable challenge to the midstream oil and gas sector in the Middle East and Africa. The region's abundant hydrocarbon resources often intersect with areas of political tension, armed conflict, and insurgency, which heightens the risk to critical infrastructure such as pipelines, terminals, and storage facilities.

Disruptions in politically sensitive areas, including the Sahel, Gulf of Guinea, and parts of North Africa, have the potential to impede operations through sabotage, theft, or direct attacks on assets. These risks affect the operational stability of midstream companies, delay project timelines, and elevate insurance and security costs. As companies seek to expand networks across borders, navigating this unstable geopolitical terrain becomes increasingly complex, making risk mitigation and infrastructure resilience a top priority.

Key Market Trends

Expansion of Natural Gas Infrastructure

A key trend shaping the MEA oil and gas midstream market is the accelerated investment in natural gas infrastructure. Recognized as a transition fuel, natural gas is gaining traction as countries seek cleaner energy solutions. Governments across the region are prioritizing the development of pipelines, LNG terminals, and storage solutions to support growing domestic and export demands.

Countries such as Qatar, Egypt, and Nigeria are investing heavily in gas infrastructure, while new discoveries in Mozambique and Tanzania are prompting rapid infrastructure build-outs to support global exports. Additionally, the GCC nations are embracing gas for power generation and industrial use, further stimulating pipeline and terminal expansion. This trend underscores the broader push for energy diversification and positions the region as a key player in the evolving global LNG market.

Key Market Players

Royal Dutch Shell PLC

Exxon Mobil Corporation

Chevron Corporation

Enbridge Inc.

Kinder Morgan, Inc.

TransCanada Corporation

Williams Companies, Inc.

Enterprise Products Partners L.P.

Report Scope:

In this report, the Middle East & Africa Oil & Gas Midstream Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Middle East & Africa Oil & Gas Midstream Market, By Pipeline Transportation:

Crude Oil

Natural Gas

Product Pipelines

Middle East & Africa Oil & Gas Midstream Market, By Storage Solutions:

Tank Farms

Underground Storage

Floating Storage

Middle East & Africa Oil & Gas Midstream Market, By Midstream Services:

Inspection & Maintenance

Safety & Compliance

Middle East & Africa Oil & Gas Midstream Market, By Country:

United Arab Emirates

Saudi Arabia

South Africa

Turkey

Qatar

Nigeria

Algeria

Rest of Middle East & Africa

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Middle East & Africa Oil & Gas Midstream Market.

Available Customizations:

Middle East & Africa Oil & Gas Midstream Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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