

Middle East & Africa Oil & Gas Pipeline Market Segmented By Type (Crude Oil Pipeline and Natural Gas Pipeline), By Application (Offshore and Onshore), By Source (Upstream, Midstream and Downstream), By Country, By Competition Forecast & Opportunities, 2018-2028

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Abstracts

Middle East & Africa Oil & Gas Pipeline Market was valued at USD 9.22 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 8.59% through 2028. Many countries in the Middle East are actively pursuing economic diversification to reduce dependence on oil exports. As part of these initiatives, there is a focus on developing downstream industries, such as petrochemicals and refineries. The construction of pipelines becomes integral to transporting feedstock and finished products, supporting economic diversification efforts and adding value to hydrocarbons within the region.

Key Market Drivers

Growing Energy Demand and Population Growth

The Middle East and Africa (MEA) region has witnessed a significant surge in energy demand, driven primarily by population growth and rapid urbanization. As the population expands, so does the need for energy to power homes, industries, and transportation. The increasing urbanization in the region has led to higher energy consumption per capita, further intensifying the demand for oil and gas. This surge in demand has prompted governments and energy companies to invest in the development and expansion of oil and gas infrastructure, including pipelines.

To meet the escalating energy requirements, governments in the MEA region are focusing on enhancing their oil and gas production capacities. Pipelines serve as a critical component of this strategy, enabling the efficient and cost-effective transportation of hydrocarbons from production sites to consumption centers. The need for reliable, safe, and cost-efficient transportation of oil and gas has become paramount, making pipeline infrastructure a vital driver in the region's energy landscape.

As energy demand continues to rise, the Middle East and Africa Oil & Gas Pipeline Market is propelled by the imperative to establish a robust and extensive pipeline network capable of handling the increased volume of hydrocarbons. This driver not only addresses the current energy needs but also anticipates future growth, positioning pipelines as a strategic investment in the long-term energy security of the region.

Economic Diversification and Infrastructure Development

Many countries in the Middle East and Africa are actively working towards economic diversification to reduce dependence on oil exports. Governments are investing in various sectors to create a more resilient and diversified economy. In this context, the oil and gas sector remains a crucial revenue source, and the development of pipelines plays a pivotal role in supporting economic diversification initiatives.

Oil and gas pipelines contribute to the creation of a robust energy infrastructure that, in turn, attracts investments in downstream industries. By facilitating the efficient transportation of hydrocarbons, pipelines enable the development of petrochemical plants, refineries, and other industries dependent on a stable and secure energy supply. This synergy between pipeline infrastructure and economic diversification becomes a significant driver for the Middle East and Africa Oil & Gas Pipeline Market.

Furthermore, the construction and maintenance of pipelines contribute to job creation, skill development, and technology transfer, fostering economic growth beyond the energy sector. As governments continue to emphasize economic diversification, the demand for comprehensive pipeline networks becomes instrumental in supporting a more sustainable and diversified economic landscape.

Geopolitical Stability and Security

The geopolitical landscape in the Middle East and Africa has a profound impact on the oil and gas industry. The stability and security of energy supply routes are paramount

for both regional and global stakeholders. Pipelines, as a mode of transportation, offer a controlled and secure means of conveying oil and gas resources across borders, reducing the vulnerability associated with other modes of transportation, such as maritime shipping.

Investments in pipeline infrastructure are often accompanied by efforts to establish political and economic stability in the region. Governments recognize the strategic importance of secure energy supply chains, and the development of pipelines contributes to fostering stability by creating interdependencies between nations. Through bilateral agreements and cooperative efforts, countries in the Middle East and Africa aim to ensure the uninterrupted flow of energy resources, thereby promoting regional stability.

The Middle East and Africa Oil & Gas Pipeline Market is driven by the geopolitical imperative to establish reliable and secure energy corridors. As pipelines offer a more controlled and secure mode of transportation compared to alternatives, they become a linchpin in the efforts to mitigate geopolitical risks associated with the oil and gas trade. In this context, the development of pipelines not only serves economic interests but also contributes to the broader goal of geopolitical stability in the region.

Key Market Challenges

Security Concerns and Geopolitical Instability

One of the foremost challenges facing the Middle East and Africa Oil & Gas Pipeline Market is the pervasive security concerns and geopolitical instability in the region. The Middle East, in particular, has been historically characterized by political volatility, regional conflicts, and tensions among neighboring nations. These factors pose significant challenges to the construction, operation, and maintenance of oil and gas pipelines.

The geopolitical landscape introduces a heightened risk of sabotage, terrorist attacks, and political unrest, which can directly impact the security of pipeline infrastructure. Pipelines are critical assets that traverse multiple territories, and any disruption along their routes can lead to substantial economic losses and affect the stability of the global energy market. Companies operating in the Middle East and Africa must contend with the complex task of safeguarding their pipelines against geopolitical risks, necessitating substantial investments in security measures and risk management strategies.

Furthermore, cross-border pipelines often traverse areas with historical territorial disputes, adding an extra layer of complexity to security challenges. The need for collaboration among nations to ensure the safety of these critical energy arteries is paramount. As the industry strives to overcome these challenges, the delicate balance between geopolitical stability and the operational security of pipelines remains a persistent obstacle in the MEA region.

Financing and Investment Hurdles

The financing and investment landscape pose significant challenges to the development of oil and gas pipelines in the Middle East and Africa. The construction of extensive pipeline networks requires substantial capital investments, and securing funding for such projects is often a protracted and intricate process. Several factors contribute to the financing challenges faced by the industry.

Firstly, economic diversification efforts in many Middle Eastern and African countries mean that governments have competing priorities for allocating funds. As a result, pipeline projects must vie for attention and financial support alongside other sectors such as healthcare, education, and infrastructure.

Secondly, the perception of political and economic risks in the region can deter potential investors. The uncertain geopolitical environment, coupled with fluctuating oil prices, makes pipeline projects in the Middle East and Africa less appealing to international investors. This challenge is exacerbated by the lengthy timelines associated with pipeline projects, which may span several years from planning to completion, adding an element of uncertainty to the return on investment.

Overcoming these financing hurdles requires collaborative efforts between governments, private investors, and international financial institutions to create a conducive investment environment. Governments may need to implement policies that incentivize private investment in pipeline projects, and financial institutions must develop innovative financing mechanisms to attract capital to the sector.

Environmental and Social Considerations

The Middle East and Africa Oil & Gas Pipeline Market faces increasing scrutiny and challenges related to environmental and social considerations. The construction and operation of pipelines can have significant environmental impacts, including habitat disruption, soil erosion, and the potential for oil spills or gas leaks. Moreover, pipelines

often traverse areas inhabited by indigenous communities, leading to social concerns related to land rights, displacement, and cultural heritage.

Environmental regulations and standards are evolving globally, and there is a growing awareness of the need to transition to more sustainable energy practices. This shift puts pressure on the oil and gas industry to adopt environmentally responsible practices, impacting the planning and execution of pipeline projects. Compliance with stringent environmental regulations adds complexity to the permitting process and may result in delays and increased costs for pipeline developers.

Social considerations, including community engagement and addressing the concerns of local populations, are becoming increasingly important. Resistance from communities and advocacy groups can lead to project delays or cancellations, emphasizing the need for transparent communication and collaboration with stakeholders.

Balancing the imperative for energy infrastructure development with environmental and social responsibility presents a formidable challenge for the Middle East and Africa Oil & Gas Pipeline Market. Companies operating in the region must navigate these complexities, incorporating sustainable practices into their operations while addressing the legitimate concerns of communities and environmental advocates. This challenge underscores the industry's need to adopt a holistic and responsible approach to pipeline development in the face of evolving environmental and social expectations.

Key Market Trends

Expansion of Natural Gas Infrastructure

A prominent trend in the Middle East and Africa Oil & Gas Pipeline Market is the accelerating expansion of natural gas infrastructure. With a growing emphasis on cleaner and more sustainable energy sources, natural gas has emerged as a key player in the region's energy transition. Governments and energy companies are investing significantly in the development of natural gas fields and the construction of pipelines to transport this cleaner-burning fuel.

Natural gas pipelines offer a more environmentally friendly alternative to traditional oil pipelines, aligning with global efforts to reduce carbon emissions. The Middle East, in particular, holds substantial natural gas reserves, and there is a concerted effort to harness these resources to meet domestic energy needs and drive economic growth. The trend toward natural gas infrastructure expansion is not only driven by

environmental considerations but also by the versatility of natural gas in power generation, industrial processes, and as a feedstock for petrochemical industries.

Additionally, the growth of liquefied natural gas (LNG) projects in the region further contributes to the demand for robust pipeline networks. LNG terminals require intricate pipeline systems to transport gas from production facilities to processing plants and eventually to export terminals. This trend reflects the region's commitment to diversifying its energy mix and capitalizing on the economic and environmental benefits of natural gas.

Digitalization and Advanced Technologies in Pipeline Operations

The Middle East and Africa Oil & Gas Pipeline Market is witnessing a transformative trend with the increasing adoption of digitalization and advanced technologies in pipeline operations. Traditionally, pipeline monitoring and maintenance have been resource-intensive and relied on manual inspection processes. However, the integration of digital technologies such as sensors, data analytics, and artificial intelligence is revolutionizing the way pipelines are operated and maintained.

One key aspect of this trend is the implementation of smart pipeline monitoring systems. These systems utilize sensors to continuously collect data on pipeline conditions, detecting anomalies, leaks, or structural issues in real-time. This proactive approach to monitoring enhances safety, reduces downtime, and minimizes the environmental impact of potential incidents.

Furthermore, the adoption of predictive maintenance through data analytics allows pipeline operators to anticipate and address issues before they lead to failures or disruptions. This not only improves the overall efficiency of pipeline operations but also extends the lifespan of the infrastructure.

The integration of advanced technologies is not limited to monitoring and maintenance. Remote sensing technologies, including satellite imagery and drones, are increasingly employed for surveying, mapping, and inspecting pipeline routes. These technologies enhance the accuracy of planning and construction phases while minimizing the environmental impact of pipeline development.

Regional Collaboration and Integration of Energy Markets

A notable trend in the Middle East and Africa Oil & Gas Pipeline Market is the

increasing emphasis on regional collaboration and the integration of energy markets. Countries in the region are recognizing the benefits of cooperation in developing and operating cross-border pipeline projects. This collaborative approach aims to optimize resource utilization, enhance energy security, and create a more interconnected and resilient energy infrastructure.

One example of this trend is the development of interconnecting pipelines that link multiple countries, allowing for the seamless transport of oil and gas across borders. Regional integration facilitates the sharing of resources, expertise, and infrastructure, leading to more efficient and cost-effective energy transportation.

The Gulf Cooperation Council (GCC) countries, for instance, are actively engaged in collaborative projects to interconnect their energy infrastructure, fostering a more integrated energy market. This trend is not limited to the Gulf region; similar initiatives are underway in other parts of the Middle East and Africa, reflecting a broader shift towards regional economic integration and cooperation.

The integration of energy markets also aligns with the broader goals of economic diversification and resilience. By creating interconnected energy grids and pipelines, countries can better balance their energy portfolios, respond to fluctuations in demand, and collectively address challenges such as geopolitical risks or supply disruptions. This trend signifies a strategic and forward-looking approach to energy development in the Middle East and Africa, positioning the region as a key player in the global energy landscape.

Segmental Insights

Type Insights

The Natural Gas Pipeline segment emerged as the dominating segment in 2022. One prominent trend in the natural gas pipeline segment is the increasing emphasis on natural gas as a cleaner and more sustainable energy source. Governments in the MEA region are recognizing the environmental advantages of natural gas over traditional fossil fuels, leading to a shift in energy policies. This transition is driving the demand for natural gas pipelines to transport the fuel efficiently from production facilities to end-users. The trend is particularly notable in the Middle East, where countries are investing in the development of their natural gas reserves to diversify their energy mix. The abundant availability of natural gas in the region has led to a surge in exploration and production activities, necessitating the expansion of natural gas pipeline networks.

A significant development in the natural gas pipeline segment is the push towards interconnected regional gas grids. Countries in the MEA region are increasingly collaborating to create a seamless network of natural gas pipelines, allowing for the efficient transportation of gas across borders. This integration enhances energy security, optimizes resource utilization, and fosters regional economic cooperation. The Gulf Cooperation Council (GCC) countries, for example, have been actively involved in initiatives to connect their natural gas infrastructure. The development of interconnected grids enables the sharing of resources and promotes a more resilient and interconnected energy landscape. This trend reflects a strategic approach to regional energy planning, leveraging natural gas pipelines to create a cohesive and efficient network.

Economic factors, including natural gas prices and investment climates, significantly impact the natural gas pipeline segment in the MEA region. Fluctuations in global gas prices can influence investment decisions, affecting the pace and scale of natural gas pipeline projects. Economic diversification efforts in some countries also contribute to the strategic planning of natural gas infrastructure to support broader economic goals.

Source Insights

The Upstream segment is projected to experience rapid growth during the forecast period. The upstream segment's dynamics are intricately linked to exploration and production activities. In the Middle East, a region known for its vast oil reserves, exploration efforts often target new reservoirs to sustain and expand oil production. Similarly, Africa has witnessed increasing exploration activities, with several countries identifying significant oil and gas reserves. Upstream pipelines play a pivotal role in transporting crude oil and natural gas from extraction sites to processing facilities. The analysis of exploration trends involves monitoring the discovery of new fields, advancements in exploration technologies, and the overall investment climate for upstream activities. The focus on unconventional resources, such as shale oil and gas, is also influencing exploration strategies in some regions.

The upstream segment is characterized by continuous technological advancements aimed at improving exploration efficiency, enhancing recovery rates, and optimizing production processes. In the Middle East and Africa, technological innovations in seismic imaging, drilling techniques, and reservoir management have a direct impact on the demand for and design of upstream pipelines. For example, the adoption of advanced drilling technologies, including horizontal drilling and hydraulic fracturing, can

influence the layout and design of pipelines. Additionally, the integration of digital technologies, data analytics, and artificial intelligence in reservoir monitoring and management enhances the overall efficiency and productivity of upstream operations, affecting the planning and operation of associated pipelines.

The development of upstream infrastructure, including pipelines, is closely tied to the need for connectivity between extraction sites and processing facilities. Upstream pipelines must be strategically planned to connect remote exploration and production locations with central processing hubs. The analysis of this aspect involves evaluating the efficiency and capacity of existing infrastructure, identifying areas for expansion, and ensuring connectivity to downstream facilities.

Country Insights

Saudi Arabia emerged as the dominating country in 2022. Saudi Arabia possesses one of the world's largest proven oil reserves, making it a crucial player in the global energy landscape. The country has strategically utilized its vast hydrocarbon resources to become a leading exporter of crude oil. Exploration activities in Saudi Arabia focus on maintaining and expanding oil production capacities to meet domestic and international demand. Additionally, Saudi Arabia is actively involved in regional pipeline projects, fostering connectivity with neighboring countries. Collaborative initiatives, such as the Arab Gas Pipeline, highlight the country's commitment to regional energy integration and cooperation.

Saudi Arabia has embraced technological advancements in the oil and gas sector to enhance exploration, production, and pipeline operations. Advanced drilling technologies, reservoir management systems, and digitalization have been integrated into upstream and downstream activities. The adoption of smart technologies in pipeline monitoring and maintenance enhances the safety and efficiency of the country's pipeline infrastructure.

Saudi Arabia's geopolitical stability is a significant factor in its role in the Middle East & Africa Oil & Gas Pipeline Market. The country's political stability contributes to a favorable environment for ongoing exploration and production activities. Moreover, Saudi Arabia's diplomatic influence in the region positions it as a key player in collaborative efforts to ensure the stability of energy supply routes and the development of regional pipeline networks.

As part of its Vision 2030 initiative, Saudi Arabia is actively working on diversifying its economy beyond oil exports. This economic diversification includes investments in renewable energy, downstream industries, and the development of a vibrant non-oil sector. While these efforts aim to reduce reliance on oil, they also impact the planning and development of pipeline infrastructure to support a more diversified energy portfolio.

Saudi Arabia has established a regulatory framework to govern the oil and gas sector, ensuring safety, environmental compliance, and efficient operations. The regulatory environment plays a crucial role in attracting investments and fostering responsible and sustainable development in the oil and gas pipeline segment.

In conclusion, Saudi Arabia's role in the Middle East & Africa Oil & Gas Pipeline Market is characterized by abundant hydrocarbon resources, extensive pipeline infrastructure, technological advancements, geopolitical stability, economic diversification efforts, a robust regulatory framework, and a commitment to sustainability. Understanding these factors is crucial for stakeholders looking to engage in the dynamic and strategic oil and gas sector in Saudi Arabia.

Key Market Players

Saudi Aramco

Abu Dhabi National Oil Company

Sonatrach

Transnet SOC Ltd

Petroleum Development Oman

Oman Gas Company

Botas Petroleum Pipeline Corporation

Emirates National Oil Company

Gazprom

SNPC

Report Scope:

In this report, the Middle East & Africa Oil & Gas Pipeline 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 Pipeline Market, By Type:

Crude Oil Pipeline

Natural Gas Pipeline

Middle East & Africa Oil & Gas Pipeline Market, By Application:

Offshore

Onshore

Middle East & Africa Oil & Gas Pipeline Market, By Source:

Upstream

Midstream

Downstream

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

United Arab Emirates

Saudi Arabia

South Africa

Turkey

Qatar

Nigeria

Algeria

Iran

Egypt

Morocco

Competitive Landscape

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

Available Customizations:

Middle East & Africa Oil & Gas Pipeline market report with the given market data, Tech Sci 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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