

# **Midstream Oil and Gas Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Sector (Transportation, Storage and Terminals), By Region, By Competition, 2019-2029F**

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## **Abstracts**

Global Midstream Oil and Gas Market was valued at USD 34 Billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 3.2% through 2029. The Global Midstream Oil and Gas Market plays a pivotal role in the energy sector's dynamics, encompassing a spectrum of activities vital for transporting, storing, and distributing petroleum products. This segment acts as a critical bridge between upstream exploration and downstream distribution, facilitating the movement of crude oil and natural gas from production sites to end consumers. Several factors contribute to the market's steady growth trajectory. One primary driver is the relentless global demand for energy, which continues to spur investments and developments in midstream infrastructure. Additionally, geopolitical factors, regional supply-demand imbalances, and shifts in regulatory landscapes significantly influence market trends and investment decisions within this sector.

Technological advancements in transportation and storage technologies have enhanced efficiency, safety, and environmental sustainability within the midstream segment, attracting further investments. The growing adoption of renewable energy sources and the ongoing transition toward cleaner energy alternatives are also reshaping strategies and investments in this market, prompting innovations and adaptations within midstream operations. In essence, the Global Midstream Oil and Gas Market showcases resilience amid evolving energy landscapes, driven by demand dynamics, geopolitical factors, technological advancements, and the pursuit of sustainable energy solutions.

## Key Market Drivers

### Global Energy Demand

The foremost driver behind the growth of the Global Midstream Oil and Gas Market is the incessant demand for energy worldwide. As populations expand and economies burgeon, the need for energy surges across industries, transportation, and households. This escalating demand propels investments in midstream infrastructure to transport, store, and distribute oil and gas efficiently.

Emerging economies, particularly in Asia, play a significant role in this surge, experiencing rapid industrialization and urbanization. Consequently, these regions witness heightened energy consumption, compelling midstream oil and gas players to expand their networks and operations. Moreover, developed nations maintain steady demand, necessitating upgrades and expansions of existing infrastructure to meet evolving needs.

### Geopolitical Factors

Geopolitical dynamics intricately intertwine with the Global Midstream Oil and Gas Market. Political tensions, conflicts, and policy changes in oil-producing regions directly impact supply chains and market stability. Disruptions in key regions can create supply shortages, affecting prices and necessitating alternative transportation routes and storage solutions.

Geostrategic decisions regarding pipeline routes, port access, and cross-border agreements significantly influence midstream operations. For instance, disputes over pipeline routes or sanctions on particular regions can reroute the flow of oil and gas, impacting the entire midstream network's efficiency and profitability.

### Technological Advancements

Continuous technological innovations play a pivotal role in shaping the modern midstream sector. Advanced technologies enhance efficiency, safety, and environmental sustainability within transportation, storage, and distribution processes. Automation, IoT-enabled monitoring systems, and predictive analytics optimize operations, reducing downtime and enhancing asset utilization.

Innovations in pipeline materials, such as corrosion-resistant alloys and improved

coatings, increase infrastructure longevity and reliability. Moreover, advancements in liquefied natural gas (LNG) technologies facilitate easier transportation over longer distances, unlocking new markets and opportunities for midstream players.

### Transition to Renewable Energy

The increasing global focus on sustainability and the transition to renewable energy sources introduces both challenges and opportunities for the midstream oil and gas sector. The rising adoption of renewables prompts midstream companies to diversify their portfolios and invest in cleaner energy alternatives, such as hydrogen or biofuels.

Additionally, the integration of renewable energy into existing infrastructure, like incorporating natural gas into power generation, creates synergies within the midstream sector. However, this transition also requires strategic planning to adapt to changing energy mixes and evolving consumer preferences.

### Regulatory and Environmental Pressures

Regulatory frameworks and environmental concerns exert profound influence on the midstream oil and gas market. Stricter regulations related to emissions, pipeline safety, and environmental impact necessitate investments in sustainable practices and technologies. Compliance with stringent standards often entails higher operational costs, prompting companies to innovate and optimize processes to minimize environmental footprints. Adherence to these regulations is not only a legal requirement but also crucial for maintaining public trust and securing social licenses to operate.

### Key Market Challenges

#### Volatility in Oil and Gas Prices

One of the perennial challenges for the midstream oil and gas sector is the inherent volatility in commodity prices. Fluctuations in global oil and gas prices significantly impact the market dynamics, profitability, and investment decisions within the midstream segment. The prices are influenced by various factors, including geopolitical tensions, supply-demand imbalances, and economic uncertainties.

Sharp price declines, such as those witnessed during economic downturns or sudden supply surpluses, pose immediate challenges for midstream companies. These events can lead to reduced revenues, project cancellations, or delays in infrastructure

development. Conversely, rapid price hikes can strain existing infrastructure, creating bottlenecks and necessitating swift adaptations to meet heightened demand.

Navigating this volatility requires robust risk management strategies, flexibility in operations, and the ability to adapt swiftly to market changes. Diversification of services and revenue streams, strategic hedging, and prudent financial planning become essential to mitigate the impact of price fluctuations on midstream operations.

### Infrastructure Aging and Maintenance

The aging infrastructure within the midstream oil and gas sector poses a significant challenge. Many pipelines, terminals, and storage facilities worldwide were built decades ago and require extensive maintenance, repair, or replacement to ensure operational efficiency, safety, and regulatory compliance.

Continuous maintenance is critical to prevent leaks, ruptures, or failures that could have severe environmental consequences and disrupt supply chains. However, upgrading or replacing aging infrastructure involves substantial capital investments and intricate logistical challenges, especially for pipelines spanning vast distances or crossing challenging terrains.

Moreover, as midstream assets age, technological advancements outpace older systems, making it imperative for companies to balance modernization efforts with ongoing operations. Striking this balance between maintaining existing infrastructure and investing in modern, more efficient systems is a complex challenge facing the midstream sector.

### Environmental Concerns and Sustainability

The midstream oil and gas sector faces mounting pressure to address environmental concerns and enhance sustainability practices. Pipelines and storage facilities are under increasing scrutiny due to their potential environmental impacts, including the risk of spills, methane emissions, and habitat disruption.

Meeting stringent environmental regulations while ensuring operational efficiency presents a formidable challenge. Implementing technologies to reduce emissions, employing advanced leak detection systems, and adhering to strict safety protocols are essential. Additionally, balancing the industry's energy needs with reducing its carbon footprint requires innovative approaches and investments in cleaner energy solutions.

## Shift Towards Renewable Energy

The growing momentum towards renewable energy sources poses a significant challenge to the midstream oil and gas sector. As the world transitions to cleaner energy, the demand for traditional fossil fuels may decline, impacting the long-term viability of existing midstream infrastructure designed primarily for oil and gas transportation and storage.

This shift necessitates strategic planning and diversification by midstream companies. Adapting existing infrastructure for handling alternative fuels like hydrogen or investing in renewable energy projects can present new opportunities. However, it requires substantial capital and operational adjustments to align with changing market demands while ensuring the continued relevance of midstream assets.

## Key Market Trends

### Adoption of Digital Technologies

The adoption of digital technologies is revolutionizing the midstream oil and gas sector. Companies are leveraging advanced data analytics, IoT sensors, and AI-driven predictive maintenance to optimize operations, enhance safety, and maximize efficiency across the entire value chain.

Integration of real-time monitoring systems in pipelines and storage facilities enables proactive identification of potential issues, reducing downtime and minimizing environmental risks. AI-driven analytics enhance decision-making by providing insights into asset performance, enabling predictive maintenance strategies and cost-effective operations.

Moreover, digital twins—virtual replicas of physical assets—aid in simulation, testing, and predictive modeling, allowing companies to optimize asset utilization and streamline maintenance schedules. This trend towards digitalization not only improves operational efficiency but also enhances safety and reduces environmental impact, aligning with the sector's push towards sustainability.

### Shift towards Energy Transition and Diversification

The industry is witnessing a significant shift towards energy transition and

diversification. Midstream companies are increasingly exploring opportunities beyond traditional oil and gas, investing in renewable energy sources, such as hydrogen, biofuels, and carbon capture technologies.

This diversification strategy aims to future-proof businesses, align with evolving energy policies, and cater to changing consumer preferences. Investments in infrastructure for renewable energy transportation, such as hydrogen pipelines or biofuel distribution networks, reflect the sector's commitment to embracing cleaner alternatives while leveraging existing expertise in transportation and storage.

### Focus on Environmental Sustainability

Environmental sustainability has become a focal point for the midstream oil and gas sector. Companies are prioritizing initiatives to reduce carbon footprints, minimize methane emissions, and implement eco-friendly practices throughout their operations.

The development of low-emission technologies, such as improved pipeline materials and leak detection systems, underscores the commitment to environmental stewardship. Additionally, investments in carbon capture, utilization, and storage (CCUS) technologies aim to mitigate greenhouse gas emissions, aligning with global efforts to combat climate change.

Furthermore, there is a growing emphasis on ESG (Environmental, Social, and Governance) criteria within the sector. Investors, stakeholders, and consumers increasingly evaluate companies based on their commitment to sustainability, thereby incentivizing midstream firms to integrate environmental considerations into their business strategies.

### Resilience and Adaptability in Supply Chains

The COVID-19 pandemic highlighted the importance of resilient supply chains in the midstream oil and gas sector. Companies are focusing on building agile and adaptable supply networks to withstand disruptions caused by unforeseen events, such as pandemics, natural disasters, or geopolitical tensions.

This trend involves diversifying supply routes, increasing storage capacity, and implementing flexible logistics solutions. Additionally, companies are exploring regionalization strategies to reduce dependency on specific regions or routes, ensuring continuity of supply even amidst global uncertainties.



## Collaboration and Partnerships

Collaboration and partnerships are emerging as key strategies in the midstream oil and gas market. Companies are forming alliances, joint ventures, and strategic partnerships to share resources, expertise, and risks, particularly in large-scale infrastructure projects.

Such collaborations enable cost-sharing, leverage specialized capabilities, and accelerate project timelines. Additionally, partnerships with technology firms or startups facilitate the integration of innovative solutions, driving efficiency and fostering innovation within the industry.

## Segmental Insights

### Sector Insights

The Global Midstream Oil and Gas Market, the Transportation segment emerged as the dominant force, exhibiting substantial influence and market share. This dominance is expected to persist and maintain its lead throughout the forecast period. The Transportation segment encompasses a vast network of pipelines, rail, ships, and trucks dedicated to transporting crude oil, natural gas, and refined products across regions and continents.

This dominance can be attributed to several factors. Firstly, the continued surge in global energy demand necessitates efficient and expansive transportation infrastructure to move significant volumes of oil and gas from production sites to consumption centers. Secondly, the ongoing exploration and production activities in diverse regions, including unconventional resource plays, further underline the critical role of transportation in linking these dispersed sources to end-users.

The Transportation segment's dominance is sustained by continuous investments in pipeline expansions, upgrades, and technological advancements. Modernization efforts, including the integration of digital technologies for pipeline monitoring and optimization, enhance the efficiency, safety, and reliability of transportation networks. The push for cleaner and more sustainable energy solutions also drives investments in pipelines for transporting natural gas, including liquefied natural gas (LNG), as a transition fuel.

Geopolitical factors and market dynamics contribute to the resilience of the

Transportation segment's dominance. Efforts to diversify supply routes, geopolitical tensions impacting traditional transit regions, and the need for flexible transportation options in response to changing demand patterns all favor the expansion and perpetuation of the Transportation segment's dominance.

While the Terminals segment, which includes storage facilities and distribution hubs, remains a crucial component of the midstream sector, the Transportation segment's scale, necessity, and ongoing investments are expected to ensure its continued dominance in the Global Midstream Oil and Gas Market. The reliance on efficient and expansive transportation networks to meet global energy demands and adapt to evolving market conditions solidifies the Transportation segment's position as the primary driver shaping the industry's landscape in the foreseeable future.

## Regional Insights

North America emerged as the dominant region in the Global Midstream Oil and Gas Market, and this dominance is anticipated to persist throughout the forecast period. Several factors contribute to North America's leading position in the midstream sector. The region's robust production of crude oil and natural gas, particularly from shale formations, has driven significant investments in midstream infrastructure. The extensive network of pipelines, terminals, and storage facilities in key producing areas like the Permian Basin in the United States and the Western Canadian Sedimentary Basin in Canada has solidified North America's prominence. Moreover, technological advancements in hydraulic fracturing techniques have facilitated a surge in production, propelling the need for enhanced transportation and storage capacities. The strategic positioning of North America as a key exporter of crude oil and liquefied natural gas (LNG) to global markets further reinforces its dominance in the midstream sector. The region's focus on infrastructure development, including pipeline expansions and interconnections, to connect production hubs to refining centers and export terminals, amplifies its significance in the global market. Additionally, regulatory frameworks and favorable market conditions in North America have fostered a conducive environment for midstream investments. Supportive policies, relatively stable geopolitical conditions compared to some other regions, and a strong emphasis on technological innovation in the midstream sector have all contributed to North America's continued dominance. Looking ahead, factors such as ongoing exploration activities, advancements in extraction technologies, and the region's strategic positioning in global energy trade are poised to sustain North America's lead in the Global Midstream Oil and Gas Market. The region's proactive approach towards infrastructure development, coupled with its vast energy reserves and export capabilities, solidifies its position as a



key influencer and driver shaping the future of the midstream oil and gas industry. In May 2023, U.S. pipeline company Oneok announced that it would pay \$18.8 billion to purchase Magellan Midstream Partners, the latest deal in what has been a robust multi-year run of MA activity in the industry.

### Key Market Players

Kinder Morgan Inc.

Enbridge Inc.

Enterprise Products Partners L.P.

TransCanada Corporation (now TC Energy)

Magellan Midstream Partners L.P.

Plains All American Pipeline L.P.

Williams Companies Inc.

Energy Transfer LP

Phillips 66 Partners LP

ONEOK Inc.

### Report Scope:

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

### Midstream Oil and Gas Market, By Sector:

o Transportation

o Storage

oTerminals

Midstream Oil and Gas Market, By Region:

oNorth America

United States

Canada

Mexico

oEurope

France

United Kingdom

Italy

Germany

Spain

Belgium

oAsia-Pacific

China

India

Japan

Australia

South Korea

Indonesia

Vietnam

oSouth America

Brazil

Argentina

Colombia

Chile

Peru

oMiddle East Africa

South Africa

Saudi Arabia

UAE

Turkey

Israel

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Midstream Oil and Gas Market.

Available Customizations:

Global Midstream Oil and Gas 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).

## Contents

### **1.PRODUCT OVERVIEW**

- 1.1.Market Definition
- 1.2.Scope of the Market
  - 1.2.1.Markets Covered
  - 1.2.2.Years Considered for Study
  - 1.2.3.Key Market Segmentations

### **2.RESEARCH METHODOLOGY**

- 2.1.Objective of the Study
- 2.2.Baseline Methodology
- 2.3.Formulation of the Scope
- 2.4.Assumptions and Limitations
- 2.5.Sources of Research
  - 2.5.1.Secondary Research
  - 2.5.2.Primary Research
- 2.6.Approach for the Market Study
  - 2.6.1.The Bottom-Up Approach
  - 2.6.2.The Top-Down Approach
- 2.7.Methodology Followed for Calculation of Market Size Market Shares
- 2.8.Forecasting Methodology
  - 2.8.1.Data Triangulation Validation

### **3.EXECUTIVE SUMMARY**

### **4.IMPACT OF COVID-19 ON GLOBAL MIDSTREAM OIL AND GAS MARKET**

### **5.VOICE OF CUSTOMER**

### **6.GLOBAL MIDSTREAM OIL AND GAS**

### **7.GLOBAL MIDSTREAM OIL AND GAS MARKET OUTLOOK**

- 7.1.Market Size Forecast
  - 7.1.1.By Value
- 7.2.Market Share Forecast

- 7.2.1.By Sector (Transportation and Storage and Terminals)
- 7.2.2.By Region (North America, Europe, South America, Middle East Africa, Asia Pacific)
- 7.3.By Company (2023)
- 7.4.Market Map

## **8.NORTH AMERICA MIDSTREAM OIL AND GAS MARKETOUTLOOK**

- 8.1.Market Size Forecast
  - 8.1.1.By Value
- 8.2.Market Share Forecast
  - 8.2.1.By Sector
  - 8.2.2.By Country
- 8.3.North America: Country Analysis
  - 8.3.1.United States Midstream Oil and Gas Market Outlook
    - 8.3.1.1.Market Size Forecast
      - 8.3.1.1.1.By Value
    - 8.3.1.2.Market Share Forecast
      - 8.3.1.2.1.By Sector
  - 8.3.2.Canada Midstream Oil and Gas Market Outlook
    - 8.3.2.1.Market Size Forecast
      - 8.3.2.1.1.By Value
    - 8.3.2.2.Market Share Forecast
      - 8.3.2.2.1.By Sector
  - 8.3.3.Mexico Midstream Oil and Gas Market Outlook
    - 8.3.3.1.Market Size Forecast
      - 8.3.3.1.1.By Value
    - 8.3.3.2.Market Share Forecast
      - 8.3.3.2.1.By Sector

## **9.EUROPE MIDSTREAM OIL AND GAS MARKETOUTLOOK**

- 9.1.Market Size Forecast
  - 9.1.1.By Value
- 9.2.Market Share Forecast
  - 9.2.1.By Sector
  - 9.2.2.By Country
- 9.3.Europe: Country Analysis
  - 9.3.1.Germany Midstream Oil and Gas Market Outlook



- 9.3.1.1. Market Size Forecast
  - 9.3.1.1.1. By Value
- 9.3.1.2. Market Share Forecast
  - 9.3.1.2.1. By Sector
- 9.3.2. France Midstream Oil and Gas Market Outlook
  - 9.3.2.1. Market Size Forecast
    - 9.3.2.1.1. By Value
  - 9.3.2.2. Market Share Forecast
    - 9.3.2.2.1. By Sector
- 9.3.3. United Kingdom Midstream Oil and Gas Market Outlook
  - 9.3.3.1. Market Size Forecast
    - 9.3.3.1.1. By Value
  - 9.3.3.2. Market Share Forecast
    - 9.3.3.2.1. By Sector
- 9.3.4. Italy Midstream Oil and Gas Market Outlook
  - 9.3.4.1. Market Size Forecast
    - 9.3.4.1.1. By Value
  - 9.3.4.2. Market Share Forecast
    - 9.3.4.2.1. By Sector
- 9.3.5. Spain Midstream Oil and Gas Market Outlook
  - 9.3.5.1. Market Size Forecast
    - 9.3.5.1.1. By Value
  - 9.3.5.2. Market Share Forecast
    - 9.3.5.2.1. By Sector
- 9.3.6. Belgium Midstream Oil and Gas Market Outlook
  - 9.3.6.1. Market Size Forecast
    - 9.3.6.1.1. By Value
  - 9.3.6.2. Market Share Forecast
    - 9.3.6.2.1. By Sector

## **10. SOUTH AMERICA MIDSTREAM OIL AND GAS MARKET OUTLOOK**

- 10.1. Market Size Forecast
  - 10.1.1. By Value
- 10.2. Market Share Forecast
  - 10.2.1. By Sector
  - 10.2.2. By Country
- 10.3. South America: Country Analysis
  - 10.3.1. Brazil Midstream Oil and Gas Market Outlook

- 10.3.1.1.Market Size Forecast
  - 10.3.1.1.1.By Value
- 10.3.1.2.Market Share Forecast
  - 10.3.1.2.1.By Sector
- 10.3.2.Colombia Midstream Oil and Gas Market Outlook
  - 10.3.2.1.Market Size Forecast
    - 10.3.2.1.1.By Value
  - 10.3.2.2.Market Share Forecast
    - 10.3.2.2.1.By Sector
- 10.3.3.Argentina Midstream Oil and Gas Market Outlook
  - 10.3.3.1.Market Size Forecast
    - 10.3.3.1.1.By Value
  - 10.3.3.2.Market Share Forecast
    - 10.3.3.2.1.By Sector
- 10.3.4.Chile Midstream Oil and Gas Market Outlook
  - 10.3.4.1.Market Size Forecast
    - 10.3.4.1.1.By Value
  - 10.3.4.2.Market Share Forecast
    - 10.3.4.2.1.By Sector
- 10.3.5.Peru Midstream Oil and Gas Market Outlook
  - 10.3.5.1.Market Size Forecast
    - 10.3.5.1.1.By Value
  - 10.3.5.2.Market Share Forecast
    - 10.3.5.2.1.By Sector

## **11.MIDDLE EAST AFRICA MIDSTREAM OIL AND GAS MARKETOUTLOOK**

- 11.1.Market Size Forecast
  - 11.1.1.By Value
- 11.2.Market Share Forecast
  - 11.2.1.By Sector
  - 11.2.2.By Country
- 11.3.Middle East Africa: Country Analysis
  - 11.3.1.Saudi Arabia Midstream Oil and Gas Market Outlook
    - 11.3.1.1.Market Size Forecast
      - 11.3.1.1.1.By Value
    - 11.3.1.2.Market Share Forecast
      - 11.3.1.2.1.By Sector
  - 11.3.2.UAE Midstream Oil and Gas Market Outlook

- 11.3.2.1. Market Size Forecast
  - 11.3.2.1.1. By Value
- 11.3.2.2. Market Share Forecast
  - 11.3.2.2.1. By Sector
- 11.3.3. South Africa Midstream Oil and Gas Market Outlook
  - 11.3.3.1. Market Size Forecast
    - 11.3.3.1.1. By Value
  - 11.3.3.2. Market Share Forecast
    - 11.3.3.2.1. By Sector
- 11.3.4. Turkey Midstream Oil and Gas Market Outlook
  - 11.3.4.1. Market Size Forecast
    - 11.3.4.1.1. By Value
  - 11.3.4.2. Market Share Forecast
    - 11.3.4.2.1. By Sector
- 11.3.5. Israel Midstream Oil and Gas Market Outlook
  - 11.3.5.1. Market Size Forecast
    - 11.3.5.1.1. By Value
  - 11.3.5.2. Market Share Forecast
    - 11.3.5.2.1. By Sector

## **12. ASIA PACIFIC MIDSTREAM OIL AND GAS MARKET OUTLOOK**

- 12.1. Market Size Forecast
  - 12.1.1. By Value
- 12.2. Market Share Forecast
  - 12.2.1. By Sector
  - 12.2.2. By Country
- 12.3. Asia-Pacific: Country Analysis
  - 12.3.1. China Midstream Oil and Gas Market Outlook
    - 12.3.1.1. Market Size Forecast
      - 12.3.1.1.1. By Value
    - 12.3.1.2. Market Share Forecast
      - 12.3.1.2.1. By Sector
  - 12.3.2. India Midstream Oil and Gas Market Outlook
    - 12.3.2.1. Market Size Forecast
      - 12.3.2.1.1. By Value
    - 12.3.2.2. Market Share Forecast
      - 12.3.2.2.1. By Sector
  - 12.3.3. Japan Midstream Oil and Gas Market Outlook

- 12.3.3.1. Market Size Forecast
  - 12.3.3.1.1. By Value
- 12.3.3.2. Market Share Forecast
  - 12.3.3.2.1. By Sector
- 12.3.4. South Korea Midstream Oil and Gas Market Outlook
  - 12.3.4.1. Market Size Forecast
    - 12.3.4.1.1. By Value
  - 12.3.4.2. Market Share Forecast
    - 12.3.4.2.1. By Sector
- 12.3.5. Australia Midstream Oil and Gas Market Outlook
  - 12.3.5.1. Market Size Forecast
    - 12.3.5.1.1. By Value
  - 12.3.5.2. Market Share Forecast
    - 12.3.5.2.1. By Sector
- 12.3.6. Indonesia Midstream Oil and Gas Market Outlook
  - 12.3.6.1. Market Size Forecast
    - 12.3.6.1.1. By Value
  - 12.3.6.2. Market Share Forecast
    - 12.3.6.2.1. By Sector
- 12.3.7. Vietnam Midstream Oil and Gas Market Outlook
  - 12.3.7.1. Market Size Forecast
    - 12.3.7.1.1. By Value
  - 12.3.7.2. Market Share Forecast
    - 12.3.7.2.1. By Sector

## **13.MARKET DYNAMICS**

- 13.1. Drivers
- 13.2. Challenges

## **14.MARKET TRENDS AND DEVELOPMENTS**

## **15.COMPANY PROFILES**

- 15.1. Kinder Morgan Inc.
  - 15.1.1. Business Overview
  - 15.1.2. Key Revenue and Financials
  - 15.1.3. Recent Developments
  - 15.1.4. Key Personnel/Key Contact Person

- 15.1.5.Key Product/Services Offered
- 15.2.Enbridge Inc.
  - 15.2.1.Business Overview
  - 15.2.2.Key Revenue and Financials
  - 15.2.3.Recent Developments
  - 15.2.4.Key Personnel/Key Contact Person
  - 15.2.5.Key Product/Services Offered
- 15.3.Enterprise Products Partners L.P.
  - 15.3.1.Business Overview
  - 15.3.2.Key Revenue and Financials
  - 15.3.3.Recent Developments
  - 15.3.4.Key Personnel/Key Contact Person
  - 15.3.5.Key Product/Services Offered
- 15.4.TransCanada Corporation (now TC Energy)
  - 15.4.1.Business Overview
  - 15.4.2.Key Revenue and Financials
  - 15.4.3.Recent Developments
  - 15.4.4.Key Personnel/Key Contact Person
  - 15.4.5.Key Product/Services Offered
- 15.5.Magellan Midstream PartnersL.P.
  - 15.5.1.Business Overview
  - 15.5.2.Key Revenue and Financials
  - 15.5.3.Recent Developments
  - 15.5.4.Key Personnel/Key Contact Person
  - 15.5.5.Key Product/Services Offered
- 15.6.Plains All American PipelineL.P.
  - 15.6.1.Business Overview
  - 15.6.2.Key Revenue and Financials
  - 15.6.3.Recent Developments
  - 15.6.4.Key Personnel/Key Contact Person
  - 15.6.5.Key Product/Services Offered
- 15.7.Williams Companies Inc.
  - 15.7.1.Business Overview
  - 15.7.2.Key Revenue and Financials
  - 15.7.3.Recent Developments
  - 15.7.4.Key Personnel/Key Contact Person
  - 15.7.5.Key Product/Services Offered
- 15.8.Energy Transfer LP
  - 15.8.1.Business Overview

- 15.8.2.Key Revenue and Financials
- 15.8.3.Recent Developments
- 15.8.4.Key Personnel/Key Contact Person
- 15.8.5.Key Product/Services Offered
- 15.9.Phillips 66 PartnersL.P.
  - 15.9.1.Business Overview
  - 15.9.2.Key Revenue and Financials
  - 15.9.3.Recent Developments
  - 15.9.4.Key Personnel/Key Contact Person
  - 15.9.5.Key Product/Services Offered
- 15.10.ONEOK Inc.
  - 15.10.1.Business Overview
  - 15.10.2.Key Revenue and Financials
  - 15.10.3.Recent Developments
  - 15.10.4.Key Personnel/Key Contact Person
  - 15.10.5.Key Product/Services Offered

## **16.STRATEGIC RECOMMENDATIONS**

## **17.ABOUT US DISCLAIMER**



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