

United States Midstream Oil and Gas Market, By Sector (Transportation, Storage and Terminals), By Region, Competition, Forecast and Opportunities, 2019-2029F

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Abstracts

United States Midstream Oil and Gas Market was valued at USD 9.2 billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 4.2% through 2029. The United States Midstream Oil and Gas Market is a dynamic sector characterized by a network of transportation, storage, and processing facilities crucial for the efficient movement and distribution of crude oil, natural gas, and related products. With the surge in domestic oil and gas production in recent years, propelled by technological innovations like hydraulic fracturing and horizontal drilling, the demand for midstream infrastructure has significantly increased. This surge has prompted considerable investment in pipeline expansions, storage facilities, and transportation infrastructure across key producing regions like the Permian Basin and the Bakken Formation. The market has witnessed a shift towards strategic partnerships and consolidation among midstream companies to optimize operations, enhance efficiencies, and capitalize on economies of scale. Despite regulatory and environmental challenges, the midstream sector continues to play a pivotal role in supporting the nation's energy independence ambitions while adapting to evolving market dynamics and sustainability initiatives.

Key Market Drivers

Regulatory Changes and Policy Dynamics

Regulatory changes and policy dynamics wield significant influence over the trajectory of the U.S. Midstream Oil and Gas Market. The industry operates within a framework

shaped by federal, state, and local regulations that impact infrastructure development, environmental standards, and safety protocols. Policy decisions on issues such as pipeline permitting, emissions regulations, land access, and safety compliance directly affect the planning, construction, and operation of midstream facilities. Shifts in government administrations often bring alterations to energy policies, impacting the sector's growth, investment landscape, and operational practices. For instance, policies promoting energy independence, streamlining permitting processes, or emphasizing environmental sustainability can significantly influence investment decisions and project timelines. Heightened focus on environmental conservation and climate change mitigation has led to increased scrutiny of midstream operations, driving companies to adopt technologies and practices aimed at minimizing environmental impacts. The evolving regulatory landscape demands adaptability from midstream entities, necessitating continuous monitoring of policy changes and proactive measures to comply with new standards while balancing economic viability and environmental responsibility.

Market Demand and Consumer Behavior

Market demand and consumer behavior play a pivotal role in shaping the U.S. Midstream Oil and Gas Market. Fluctuations in energy consumption patterns, influenced by economic factors, technological advancements, geopolitical events, and societal trends, impact the need for midstream infrastructure. Changes in consumer preferences toward cleaner energy sources, heightened efficiency standards, or shifts in transportation modes can significantly alter the demand for various oil and gas products and their transportation requirements. Additionally, global market dynamics and geopolitical tensions can impact the export-import landscape, influencing the need for infrastructure modifications or expansions to facilitate international trade. The evolution of energy demand, including the rise of renewable energy sources, electric vehicles, and energy efficiency measures, prompts midstream companies to adapt, diversify, and potentially invest in alternative energy transportation and storage solutions. Anticipating and responding to changing market demands remain crucial for the sector's resilience and long-term viability.

Technological Innovations and Digitalization

Technological innovations and digitalization stand as fundamental drivers transforming the U.S. Midstream Oil and Gas Market. Advancements in data analytics, automation, IoT (Internet of Things), and AI (Artificial Intelligence) have revolutionized operational efficiency, safety, and asset management within the sector. Digital technologies

facilitate real-time monitoring of pipelines, storage facilities, and transportation networks, enabling predictive maintenance and reducing downtime. Enhanced data analytics optimize routing decisions, minimize product losses, and improve supply chain management, resulting in cost savings and heightened reliability. Robotics and drones find applications in inspection and maintenance tasks, enhancing safety protocols and reducing human intervention in high-risk operational areas. Moreover, innovative drilling techniques, such as directional drilling and fracking, have unlocked vast reservoirs, reshaping production landscapes and necessitating corresponding midstream infrastructure adaptations. The industry's embrace of technological advancements and digital solutions remains critical for maintaining competitiveness, operational efficiency, and sustainability.

Economic Factors and Investment Climate

Economic factors and the investment climate significantly influence the U.S. Midstream Oil and Gas Market. The sector's growth and development hinge on access to capital, interest rates, commodity prices, and overall economic stability. Fluctuations in oil and gas prices directly impact investment decisions regarding infrastructure expansion, new projects, and technological innovations. During periods of favorable market conditions with stable or rising prices, there tends to be increased investment in exploration, production, and subsequently, midstream infrastructure to accommodate heightened production levels. Conversely, downturns or volatile market conditions may lead to delayed projects, reduced capital expenditure, or consolidation within the industry as companies seek cost-saving measures to weather market fluctuations. Additionally, investor sentiments toward environmental, social, and governance (ESG) considerations impact funding availability and the cost of capital for midstream projects. The industry's ability to navigate economic uncertainties, adapt to price fluctuations, and align with evolving investor priorities shapes its growth trajectory and long-term sustainability.

Environmental and Social Considerations

Environmental and social considerations have emerged as integral drivers reshaping the U.S. Midstream Oil and Gas Market. Heightened awareness of climate change, sustainability, and community impacts has prompted a shift towards greener practices, renewable energy alternatives, and stringent environmental regulations. Midstream companies face mounting pressure to minimize their ecological footprint, reduce emissions, and adopt environmentally responsible practices throughout their operations. This necessitates investments in cleaner technologies, emission reduction strategies,

and compliance with environmental regulations to mitigate adverse impacts on air, land, and water resources. Social factors such as community engagement, stakeholder relations, and indigenous land rights also influence project planning and execution. Balancing the industry's operational needs with environmental stewardship and social responsibility remains a critical challenge, requiring innovative approaches, transparency, and collaboration with stakeholders to foster sustainable development and earn public trust.

Key Market Challenges

Regulatory and Environmental Hurdles

The U.S. Midstream Oil and Gas Market faces a plethora of regulatory and environmental challenges. Regulatory complexities at federal, state, and local levels often lead to prolonged permitting processes and compliance requirements, delaying infrastructure projects and increasing operational costs. Heightened scrutiny from environmental agencies and advocacy groups demands strict adherence to environmental standards, leading to additional investment in eco-friendly technologies and mitigation measures. Balancing the need for energy infrastructure development with environmental conservation poses a significant challenge. Issues such as pipeline safety, emissions reduction, water usage in hydraulic fracturing, and land-use conflicts trigger debates and legal battles, impacting project timelines and investments. As regulations evolve, the midstream sector must navigate an increasingly complex landscape, proactively addressing environmental concerns while ensuring compliance with stringent regulations, which can significantly impact operational flexibility, project feasibility, and overall profitability.

Volatile Commodity Prices and Market Uncertainty

Volatile commodity prices and market uncertainties present a persistent challenge for the U.S. Midstream Oil and Gas Market. Fluctuations in oil and gas prices, influenced by geopolitical events, supply-demand dynamics, and economic conditions, directly impact investment decisions and project viability. Sharp declines in prices, as witnessed during global economic downturns or oversupply scenarios, can lead to project cancellations, reduced capital expenditure, and financial strain within the sector. Market uncertainty, exacerbated by geopolitical tensions or unexpected shifts in global energy demand, poses challenges for long-term planning and investment forecasting. Midstream companies must navigate this volatile landscape by adopting resilient business models, managing operational costs, and employing risk mitigation strategies to withstand price

volatility and market fluctuations, ensuring sustainable growth despite unpredictable market conditions.

Infrastructure Constraints and Bottlenecks

The U.S. Midstream Oil and Gas Market grapples with infrastructure constraints and bottlenecks, impeding efficient transportation and distribution of energy resources. Rapid production growth in key producing regions, particularly shale plays like the Permian Basin, has outpaced infrastructure development, resulting in pipeline capacity limitations and bottlenecks. Insufficient pipeline networks or inadequate storage facilities lead to logistical challenges, hampering the timely and cost-effective movement of crude oil, natural gas, and related products to refineries, export terminals, or end consumers. These constraints not only limit market access but also create pricing differentials between regions, affecting profitability and market competitiveness. Addressing these infrastructure gaps requires substantial investment in new pipeline projects, storage terminals, and transportation networks, coupled with collaborative efforts among industry stakeholders, regulatory bodies, and local communities to expedite project approvals and enhance infrastructure resilience.

Evolving Energy Transition and Decarbonization Pressures

The evolving energy transition and decarbonization efforts pose a significant challenge to the U.S. Midstream Oil and Gas Market. Heightened awareness of climate change, coupled with commitments to reduce greenhouse gas emissions, prompts increased pressure on the industry to transition toward cleaner energy sources and adopt sustainable practices. The push for renewable energy alternatives, electrification, and carbon-neutral initiatives impacts the long-term demand outlook for traditional fossil fuels, challenging the viability of midstream infrastructure investments. Uncertainties surrounding future energy policies and potential shifts in consumer preferences toward greener technologies pose risks to existing midstream assets, necessitating strategic planning to adapt to changing market dynamics. Furthermore, aligning with sustainability goals requires substantial investments in low-carbon technologies, carbon capture, utilization, and storage (CCUS), and integrating renewable energy transportation infrastructure within existing midstream networks. Navigating this transition while maintaining operational efficiency and financial viability presents a formidable challenge for the industry.

Key Market Trends

Infrastructure Expansion

The midstream oil and gas sector in the United States is witnessing a significant trend of infrastructure expansion. This includes the construction of new pipelines, storage facilities, and processing plants to accommodate the increasing production of oil and gas from shale formations. The expansion is driven by the need to transport and store the growing volumes of crude oil, natural gas, and natural gas liquids from production areas to refining centers and export terminals. This trend is also fueled by the development of new technologies and the discovery of new reserves, which require additional infrastructure to bring these resources to market.

Integration of Technology

Another prominent trend in the midstream oil and gas market is the integration of advanced technologies. Companies are increasingly leveraging digital solutions, automation, and data analytics to optimize their operations, enhance safety, and improve efficiency. This includes the use of sensors and monitoring systems to detect and prevent leaks, as well as the implementation of sophisticated software for pipeline scheduling and maintenance. The adoption of technology is helping midstream companies to better manage their assets, reduce operational costs, and ensure regulatory compliance.

Environmental Sustainability

Environmental sustainability has become a key focus for the midstream oil and gas industry. Companies are investing in initiatives to minimize their environmental footprint, such as reducing methane emissions, implementing carbon capture and storage (CCS) technologies, and utilizing renewable energy sources to power their operations. This trend is driven by increasing regulatory scrutiny, investor pressure, and public demand for cleaner energy practices. Midstream companies are also exploring opportunities to repurpose existing infrastructure for carbon transport and storage, aligning with the global push for decarbonization.

Diversification of Services

Midstream companies are diversifying their service offerings beyond traditional transportation and storage. This includes expanding into midstream logistics, such as rail and marine transportation, as well as providing value-added services like blending, fractionation, and terminal operations. By diversifying their offerings, companies aim to

capture additional revenue streams and provide comprehensive solutions to meet the evolving needs of producers and end-users in the oil and gas supply chain.

Investment in Renewable Fuels Infrastructure

With the growing emphasis on renewable energy, the midstream oil and gas market is witnessing increased investment in infrastructure for alternative fuels. This includes the development of infrastructure for biofuels, hydrogen, and renewable natural gas (RNG). Companies are exploring opportunities to repurpose existing assets for renewable fuel transportation and storage, as well as investing in new infrastructure to support the growing demand for sustainable energy sources.

Segmental Insights

Sector Insights

United States Midstream Oil and Gas Market, the transportation segment plays a dominant role, supported by a robust infrastructure network that facilitates the movement of oil and gas products across the country. This segment encompasses pipelines, railroads, and trucks, which are vital components of the midstream sector. Pipelines are a cornerstone of the transportation infrastructure, serving as the primary mode for long-distance transportation of crude oil, natural gas, and refined petroleum products. The extensive pipeline network enables efficient and cost-effective movement of commodities from production areas to consumption centers, including refineries, terminals, and distribution points. Major pipeline projects, such as those transporting oil from shale plays in North Dakota and Texas to refining hubs along the Gulf Coast, underscore the significance of this mode of transportation.

Railroads and trucks complement pipeline networks by providing flexibility in transporting oil and gas to areas not served by pipelines or for short-distance transportation. Rail transportation, in particular, has witnessed growth in recent years, offering a reliable alternative for moving crude oil from remote regions to refineries or export terminals. Meanwhile, trucks play a crucial role in transporting refined products to end consumers, including gas stations, airports, and industrial facilities.

Regional Insights

The South emerged as the dominating region within the United States Midstream Oil and Gas Market, a trend that is anticipated to persist and solidify its dominance during

the forecast period. The Southern region's ascendancy can be attributed to several key factors. Firstly, the South houses numerous major oil and gas production areas, strategically positioned near key refineries and consumption centers. This geographical advantage has naturally positioned the region as a pivotal hub for midstream activities, enabling efficient transportation and storage of oil and gas resources. Additionally, the South's robust infrastructure, particularly its extensive network of pipelines and terminals, has played a pivotal role in its dominance. These pipelines interconnect major production fields with refineries and distribution centers, facilitating the smooth flow of resources. Moreover, the region's favorable regulatory environment and pro-business policies have encouraged substantial investments in midstream infrastructure, further strengthening its dominance. Additionally, the South's proactive approach towards adopting technological advancements in the midstream sector, such as implementing innovative monitoring and automation systems, has enhanced operational efficiency and reliability, contributing to its market leadership. Furthermore, the ongoing expansion projects and investments by key industry players in the region's midstream infrastructure are poised to bolster its position as the dominant force in the United States Midstream Oil and Gas Market. Overall, the South's strategic location, well-established infrastructure, regulatory support, technological innovation, and continuous investments collectively position it as the leading region in the midstream sector, ensuring its sustained dominance throughout the forecast period.

Key Market Players

EnergyTrans Innovations LLC

PetroSafe Solutions LLC

TransConnect Logistics LLC

Midstream DynamicsCorporation

Streamline Energy Partners LLC

InterPipeline USA Inc.

CoreEnergy Midstream LLC

Visionary Oil Gas Services LLC

Nexus Midstream Solutions LLC

InfraOil America Inc.

Report Scope:

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

United States Midstream Oil and Gas Market,By Sector:

- oTransportation

- oStorage

- oTerminals

United States Midstream Oil and Gas Market, By Region:

- oSouth US

- oMidwest US

- oNorth-East US

- oWest US

Competitive Landscape

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

Available Customizations:

United States Midstream Oil and Gas Marketreport 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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