

# GLOBAL MIDSTREAM UPDATE



Andy McDowell  
Senior Vice President, Media,  
*Gulf Energy Information*

Pipeline &  
Gas Journal

Global<sup>ENERGY</sup>  
INFRASTRUCTURE

EWA<sup>™</sup>  
ENERGY WEB ATLAS

# Gulf Energy Information overview



## Media and Data to Drive Your Business

Gulf Energy Information (Gulf) is the leading provider of media, marketing and market intelligence services to the international energy industry.

With coverage spanning the upstream, midstream and downstream, Gulf provides in-depth insights, technical content and strategic direction to every sector of the energy industry.

Gulf's brands offer marketers and business development teams a superior way to reach highly qualified global audiences. Meanwhile, Gulf's market intelligence platforms equip corporate teams with up-to-date project/facility data.

### GULF BRANDS INCLUDE

World Oil

HYDROCARBON  
PROCESSING

GAS PROCESSING  
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underground  
construction

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Petroleum  
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## Featured brands

Pipeline &  
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# Pipeline & Gas Journal and Global Energy Infrastructure overview

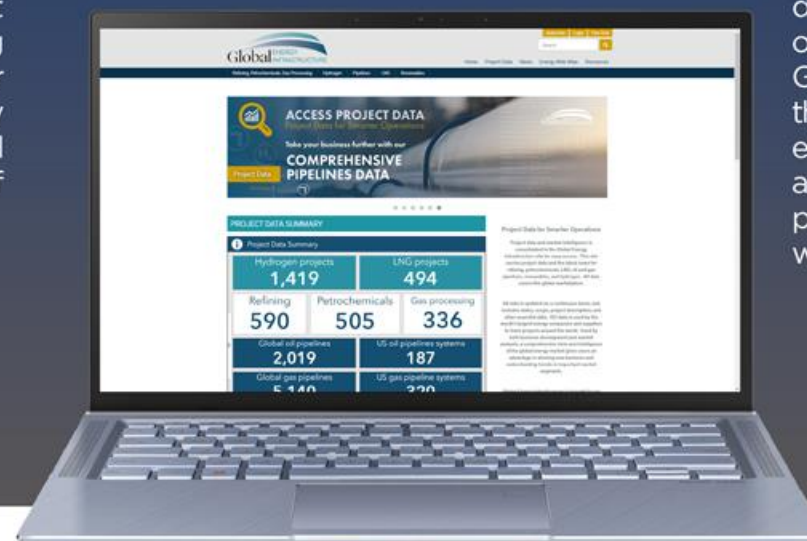
## Pipeline & Gas Journal

Since 1859, Pipeline & Gas Journal is the essential resource for technology and trends in the midstream industry; written and edited to be of service to those involved in moving, marketing and managing hydrocarbons from the wellhead to the ultimate consumer. Properly built, maintained and operated pipelines are the safest, most efficient method of transporting energy. Our intention is to assist our subscribers in performing their jobs to the utmost of their abilities and knowledge by providing information required in the day-to-day operation of energy pipelines.



## Global ENERGY INFRASTRUCTURE

Project data and market intelligence is consolidated in the Global Energy Infrastructure (GEI) site for easy access. This site carries project data and the latest news for refining, petrochemicals, LNG, oil and gas pipelines, renewables, and hydrogen. All data covers the global marketplace. All data is updated on a continuous basis, and includes status, scope, project description, and other essential data. GEI data is used by the world's largest energy companies and suppliers to track projects around the world.





## Key International reports

- **January - International construction outlook**
- Owner/Operator editorial contacts plus filings to FERC in the U.S.
- National Energy Board in Canada
- Research of various governmental entities
- Company websites, annual reports, press releases and social media
- P&GJ's annual Top 500 Pipeline Reports of the U.S. and Europe
- Global Energy Infrastructure database



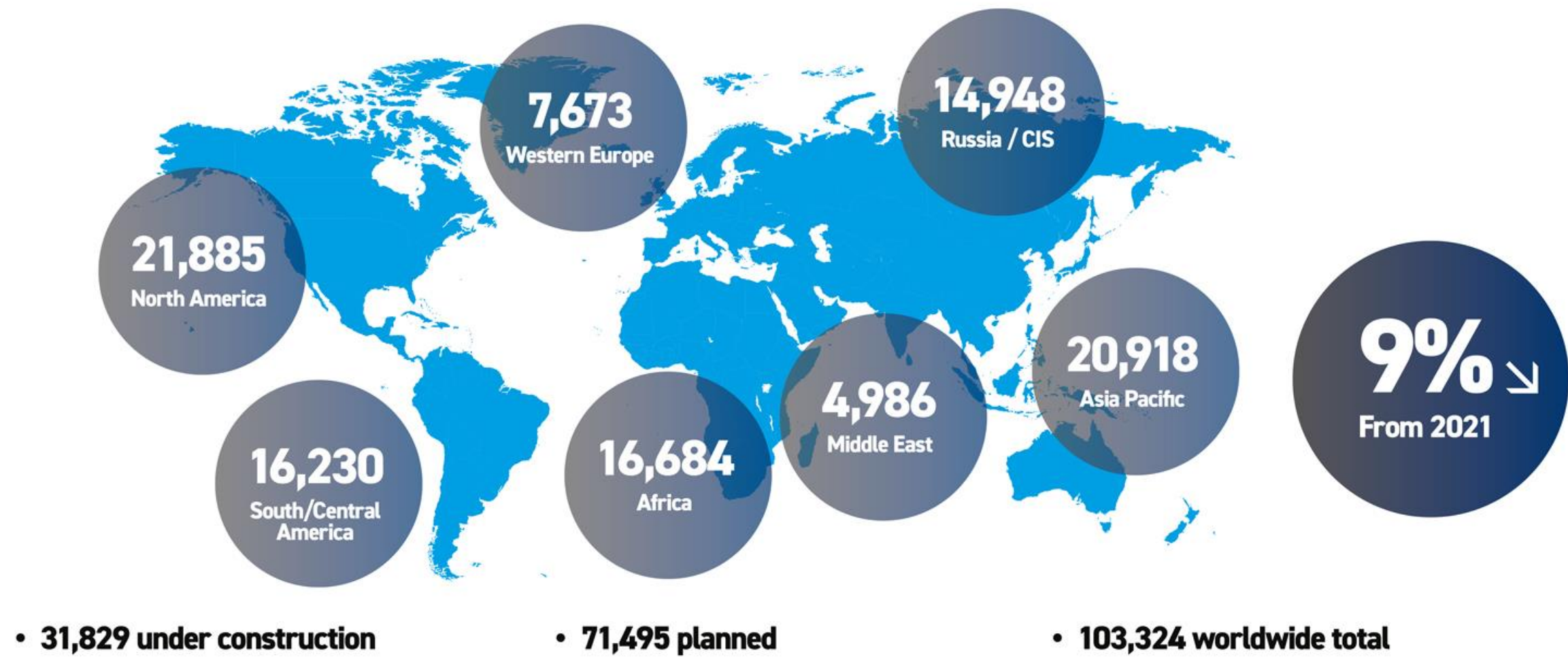
# Key International reports

- January - International construction outlook
- July - Mid-year international update



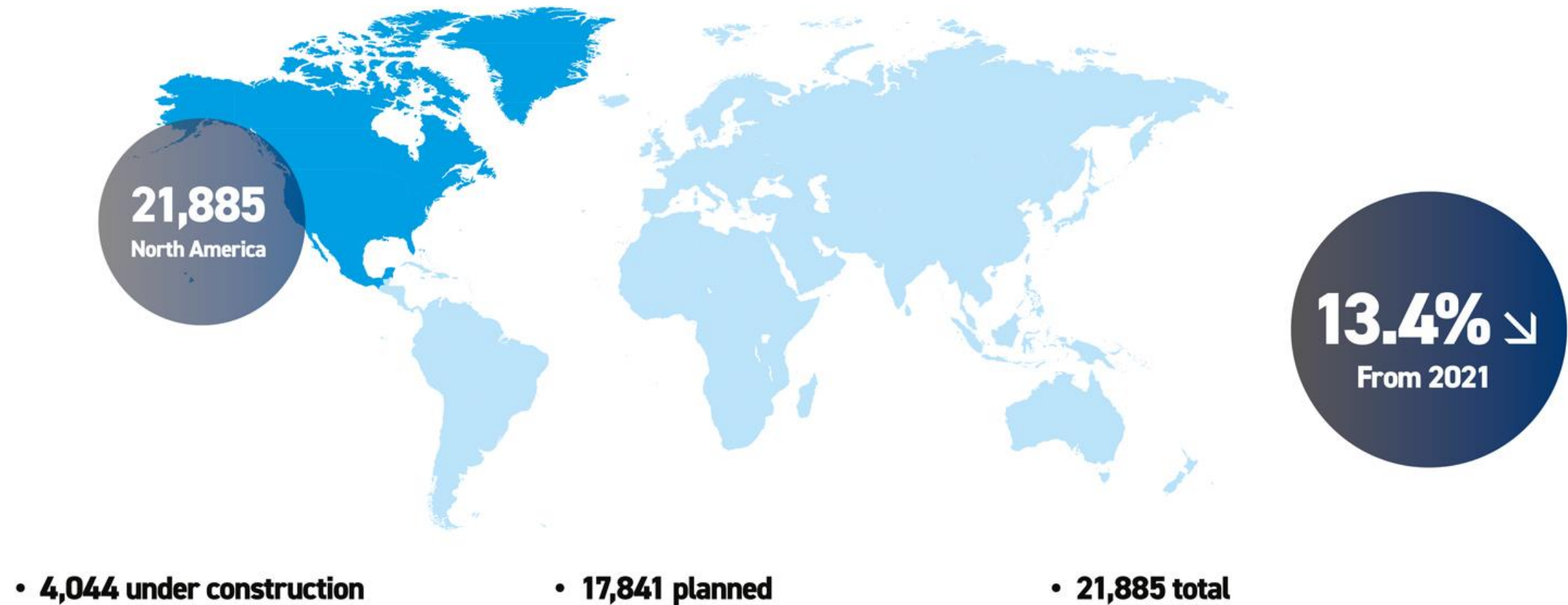


# International pipeline construction



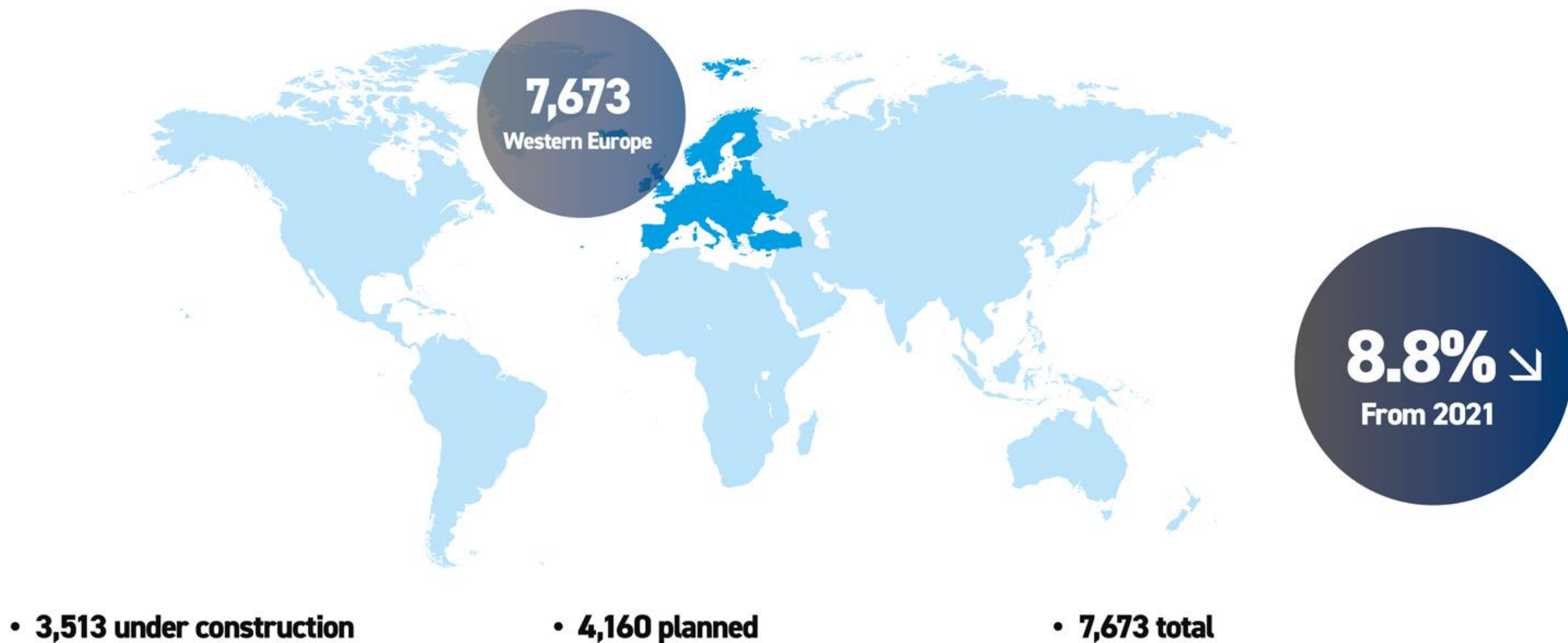
Figures in miles. Includes oil and gas pipelines

# Regional pipeline construction - North America



Figures in miles. Includes oil and gas pipelines

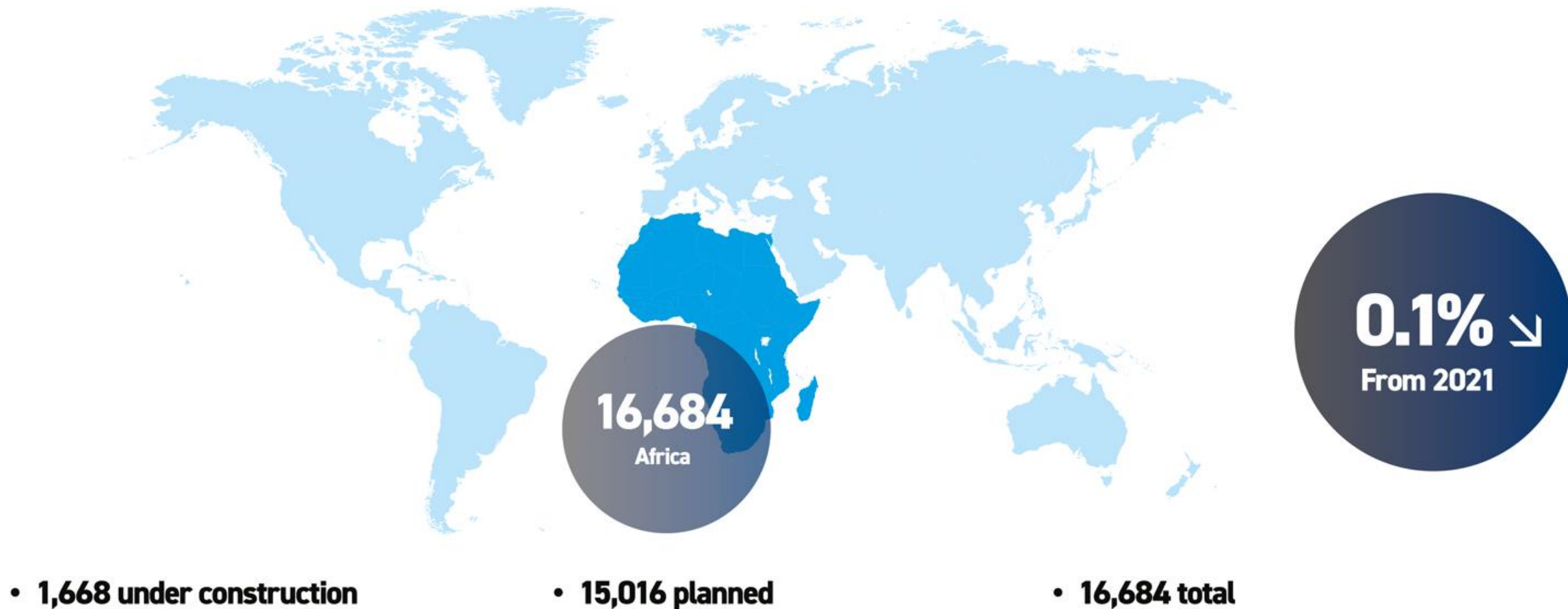
## Regional pipeline construction - Western Europe



Figures in miles. Includes oil and gas pipelines

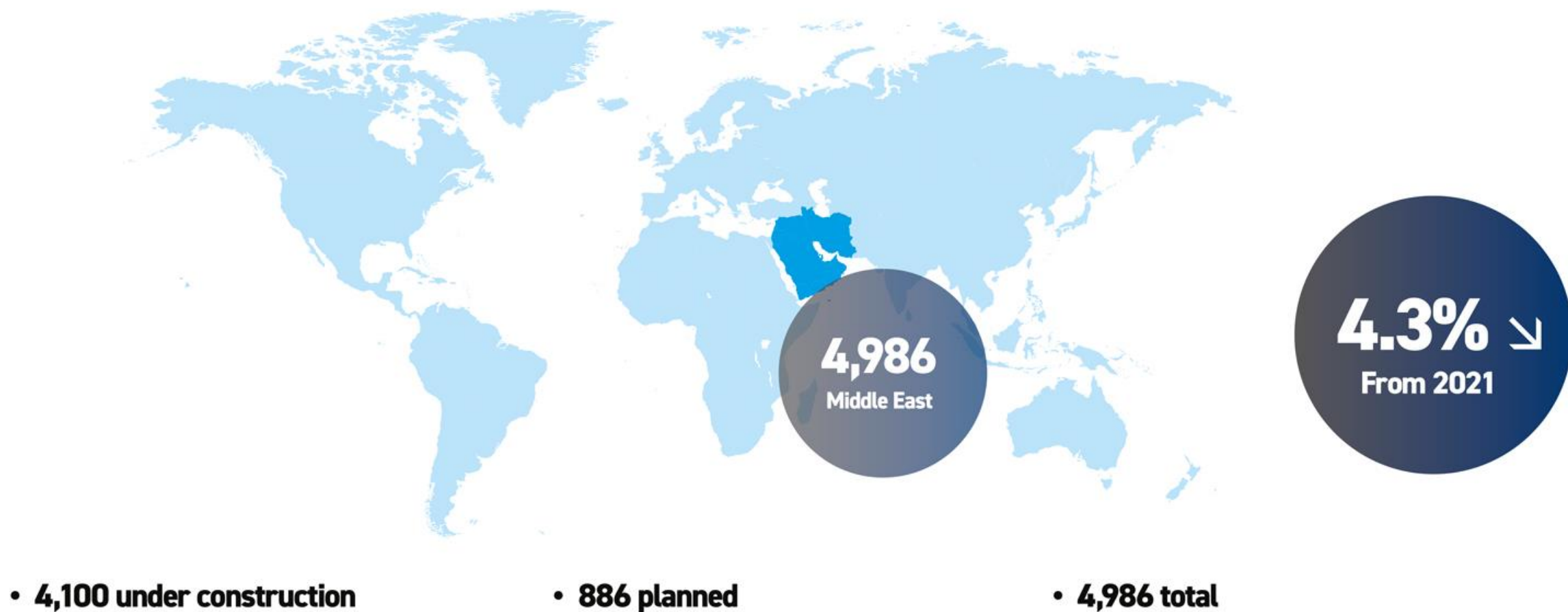


## Regional pipeline construction - Africa



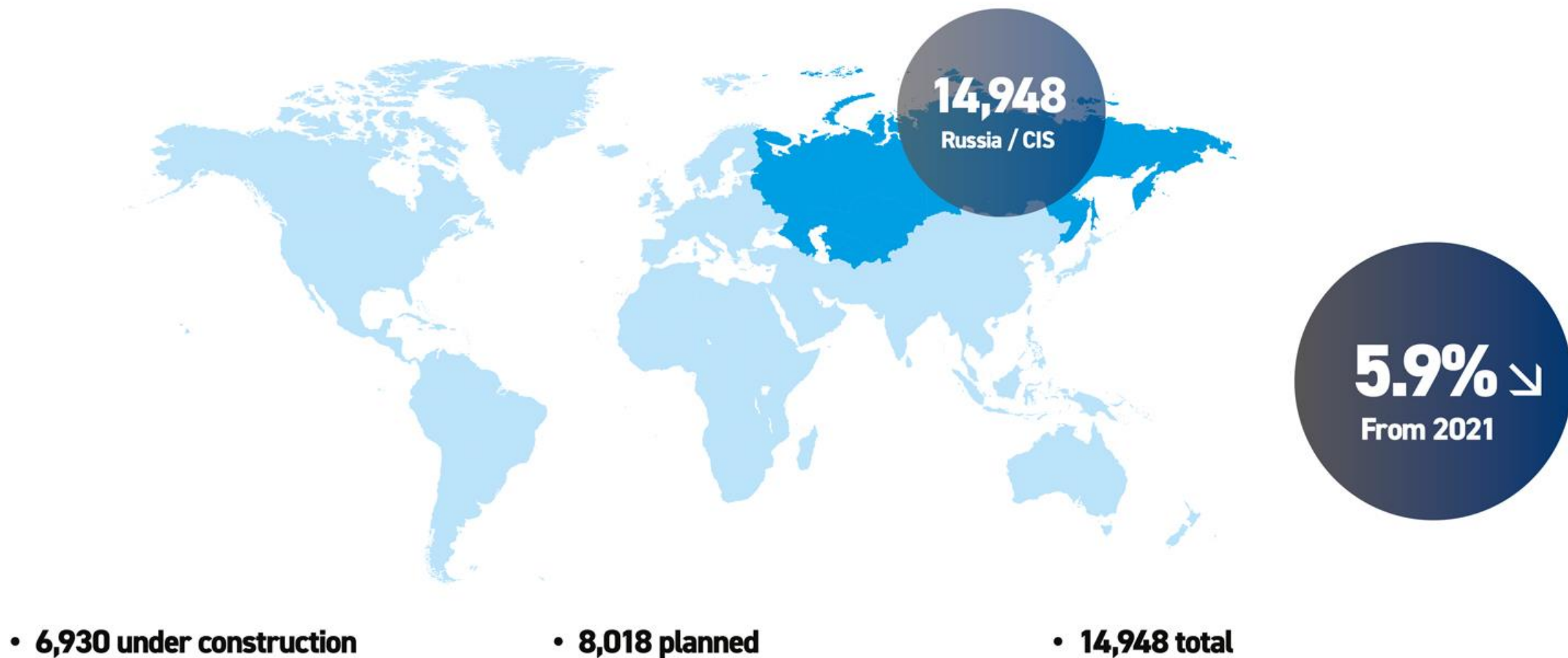
Figures in miles. Includes oil and gas pipelines

## Regional pipeline construction - Middle East



Figures in miles. Includes oil and gas pipelines

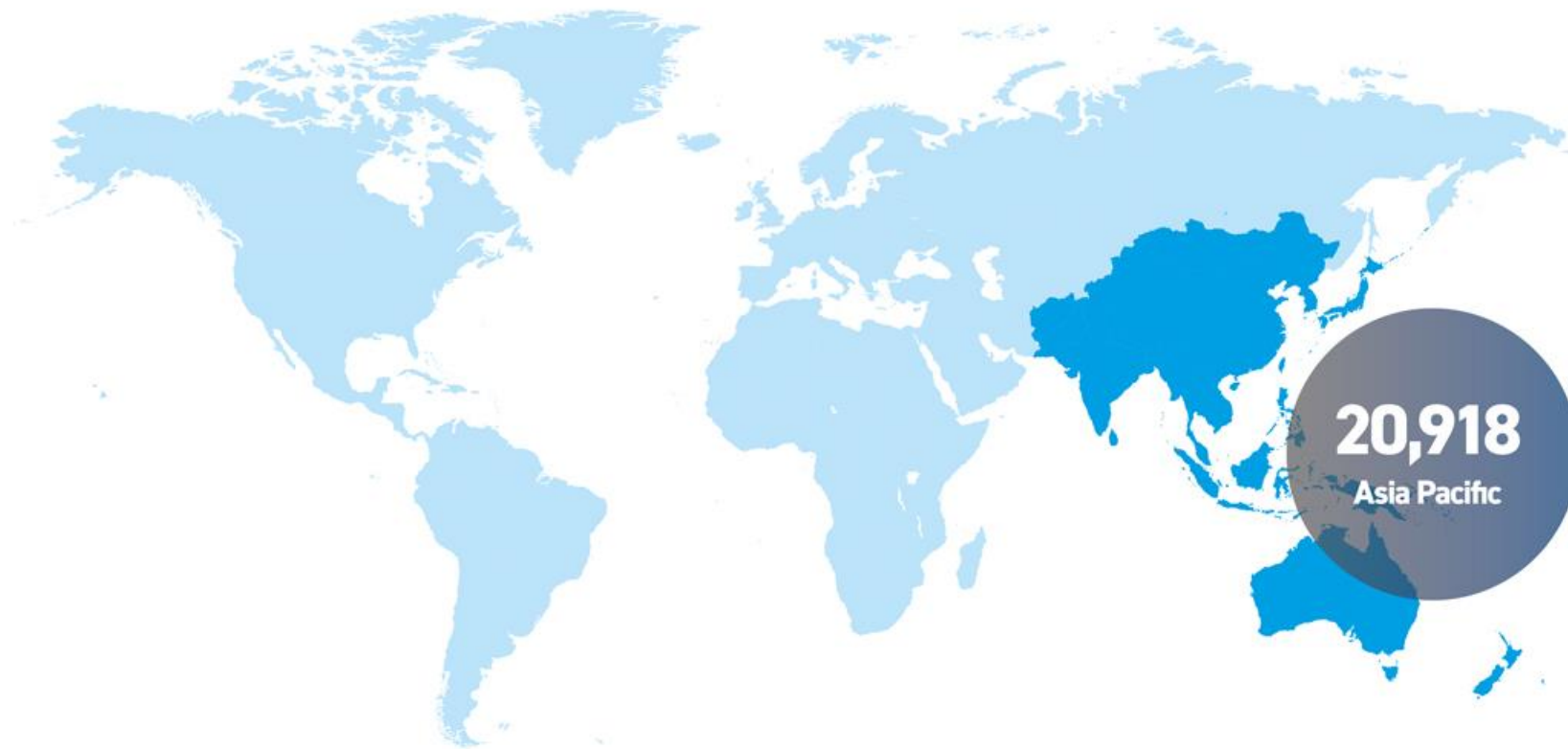
## Regional pipeline construction - Russia & CIS



Figures in miles. Includes oil and gas pipelines



## Regional pipeline construction - Asia Pacific



**20,918**  
Asia Pacific

**13.6%** ↘  
From 2021

• **10,007 under construction**

• **10,911 planned**

• **20,918 total**

Figures in miles. Includes oil and gas pipelines

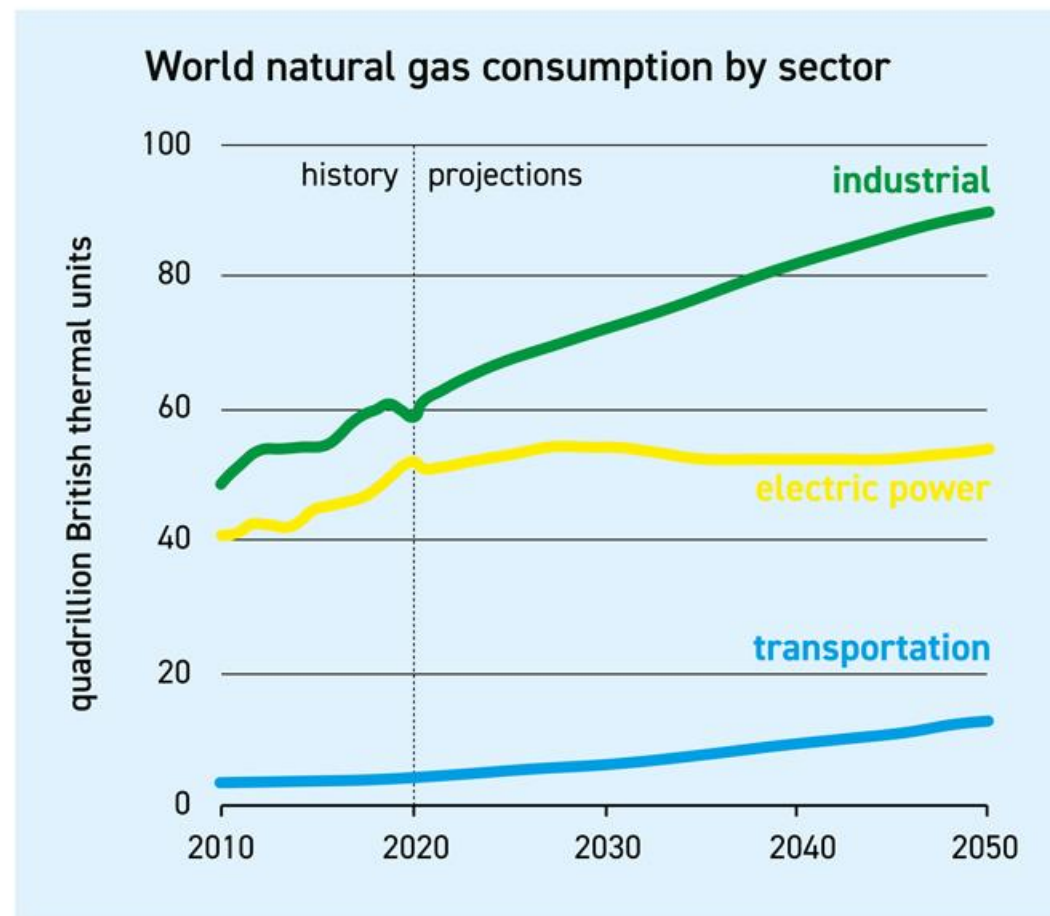
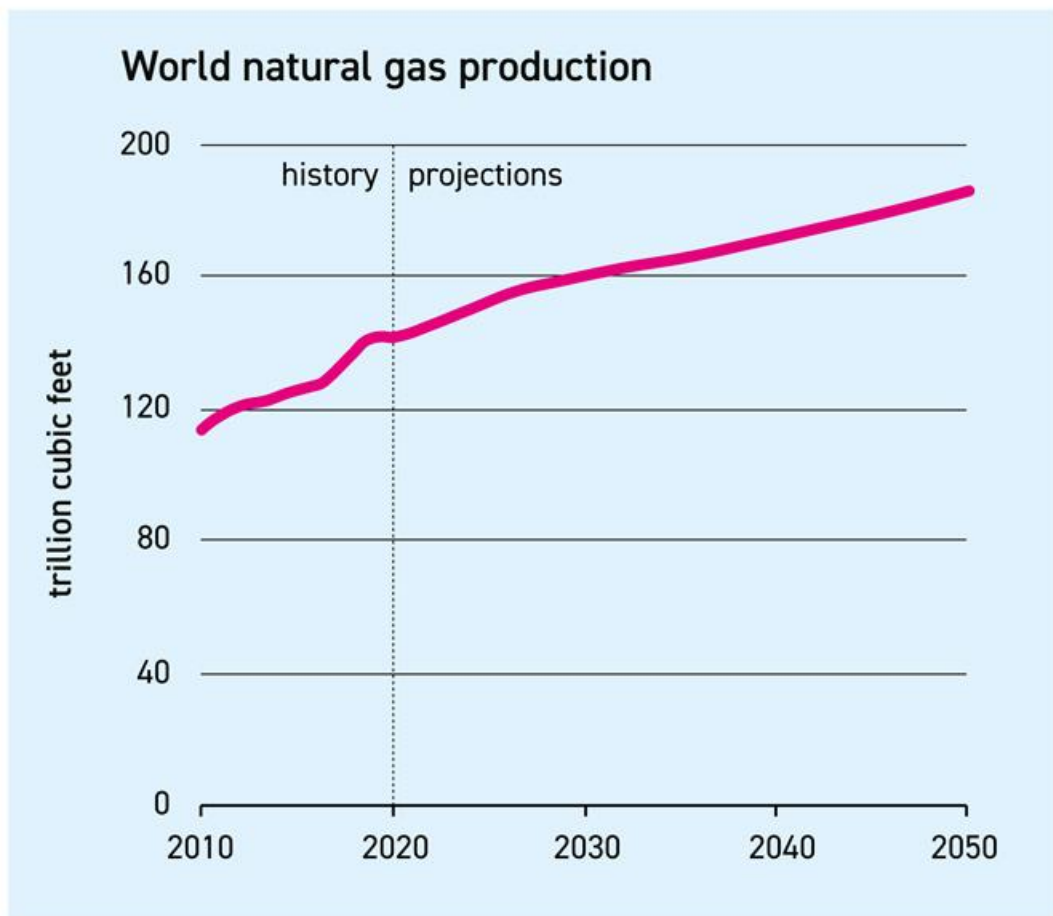
# Regional pipeline construction - South / Central America



Figures in miles. Includes oil and gas pipelines

# Market drivers

Natural gas is cementing its role in the energy transition

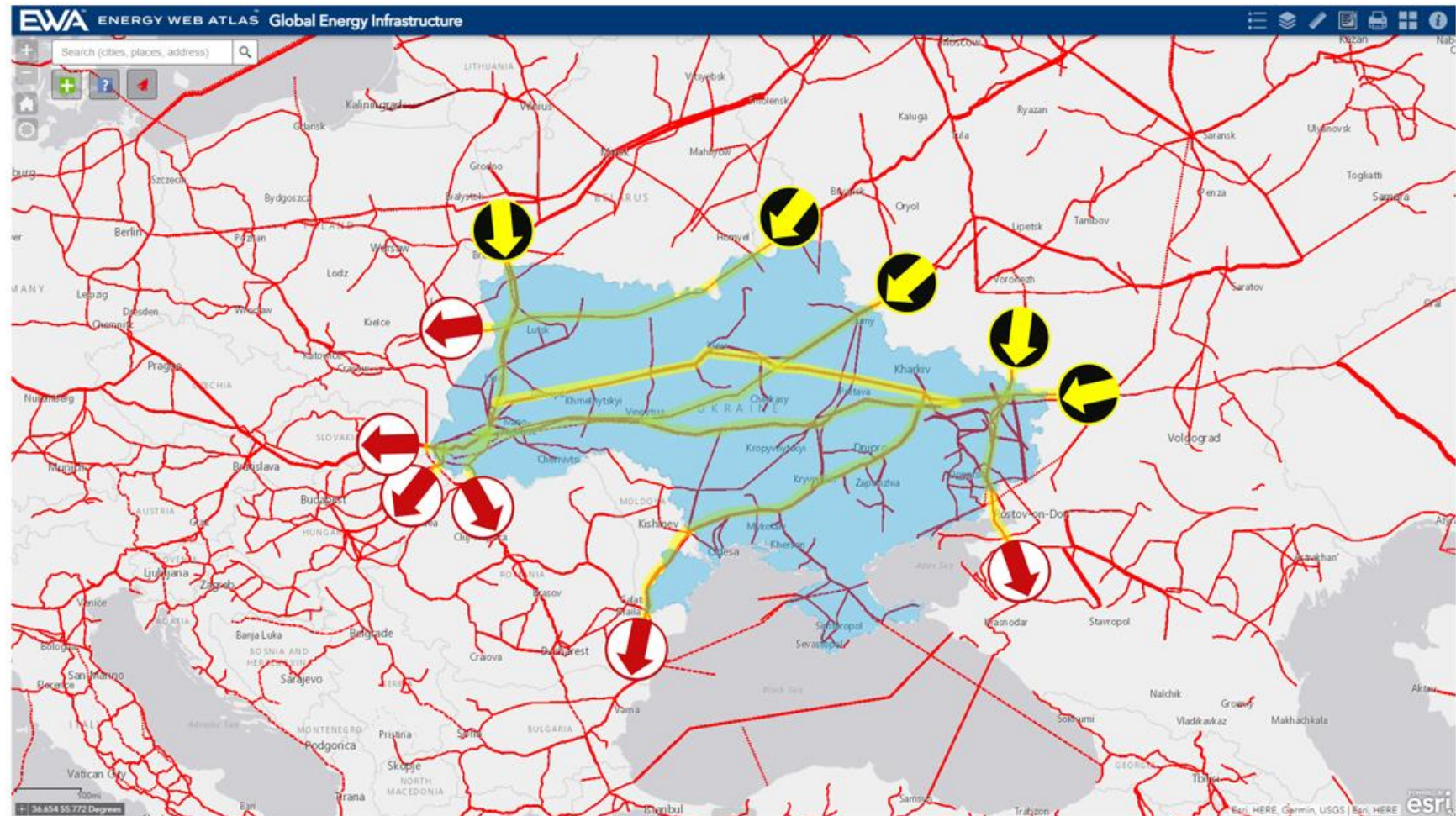


Source: EIA

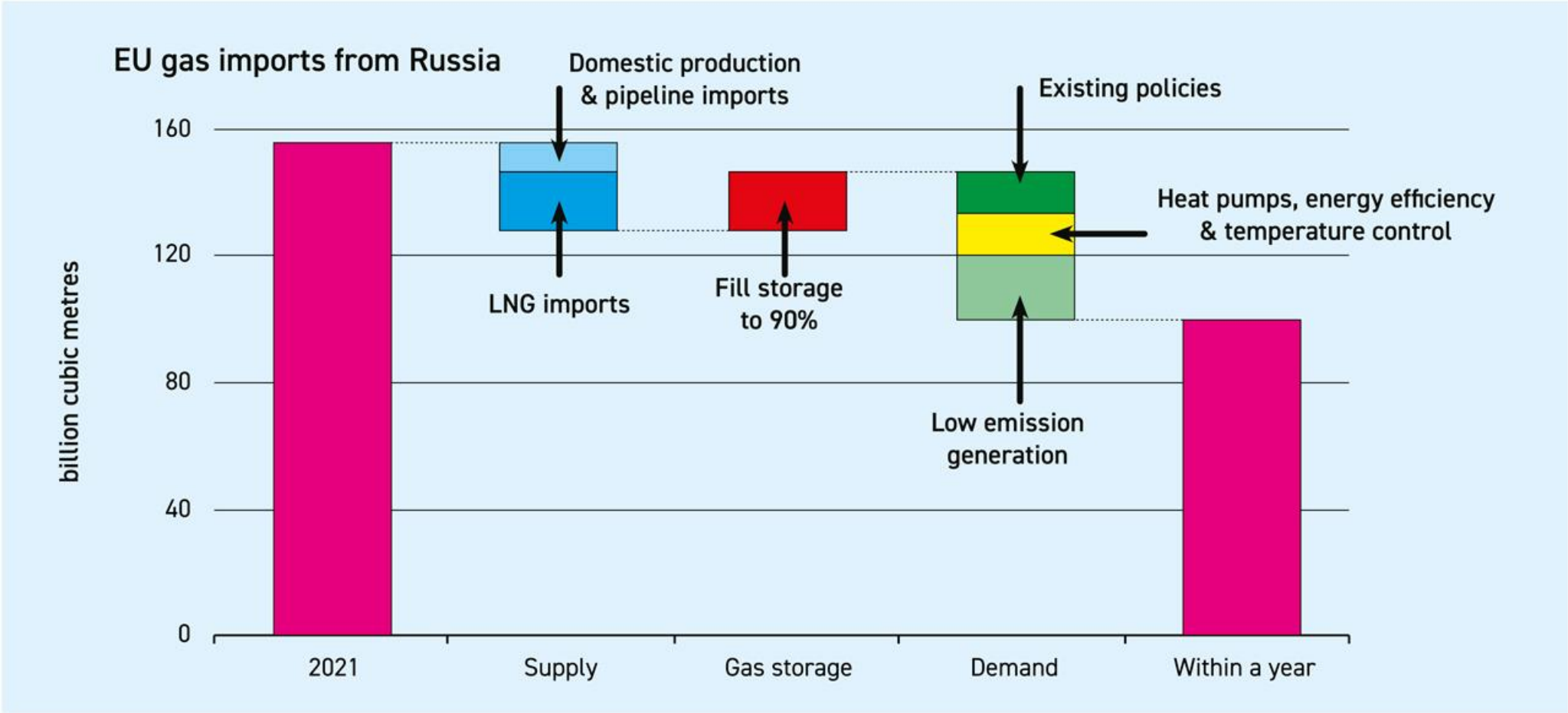


# Supplying Europe

## Natural gas transitions through Ukraine



# Supplying Europe



Source: IEA

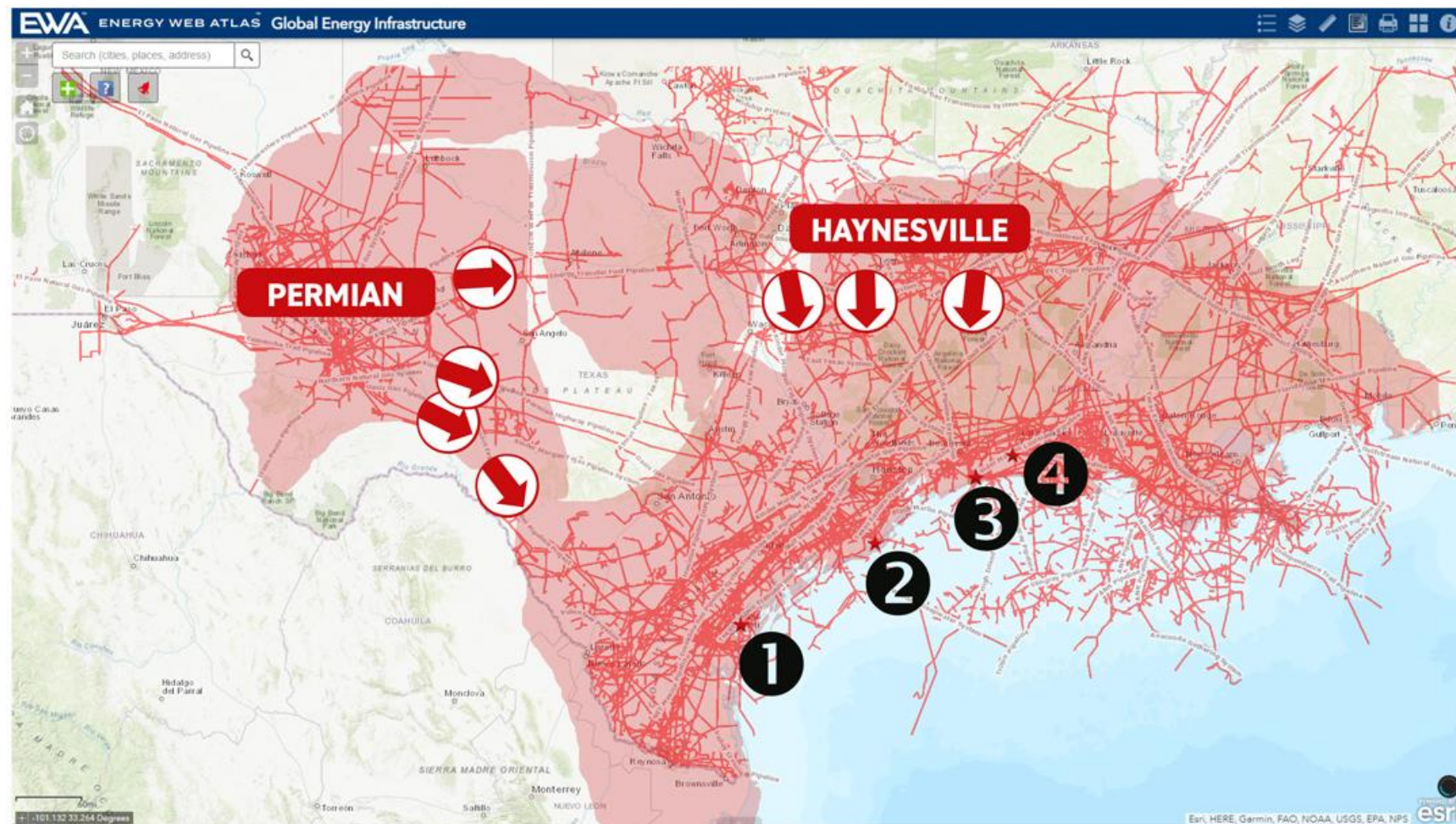


# Supplying Europe

## US LNG exports

- 1 Corpus Christi
- 2 Freeport
- 3 Sabine Pass
- 4 Lake Charles

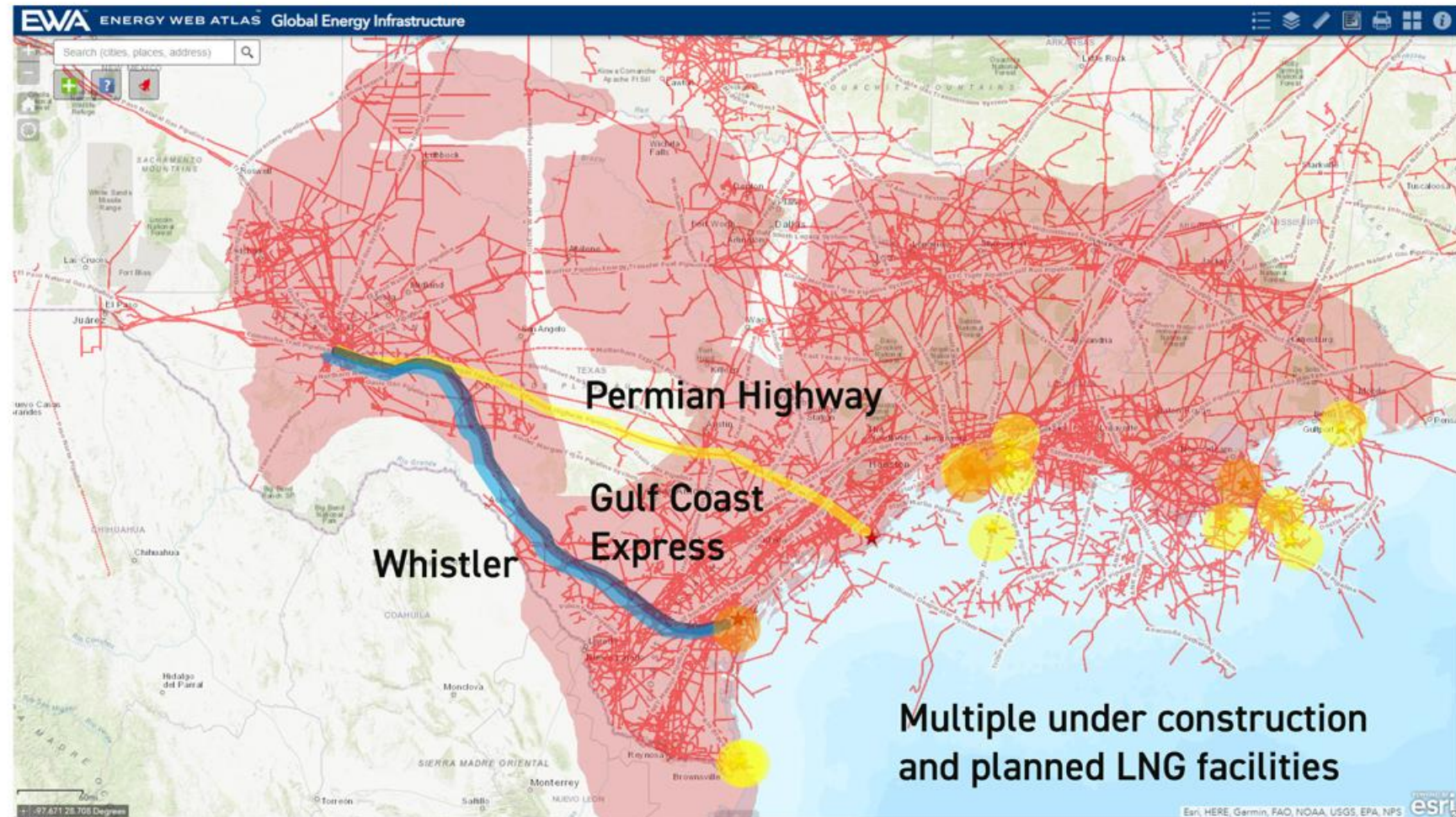
Map from Global Energy Infrastructure's





# Supplying Europe

## Completed natural gas pipelines



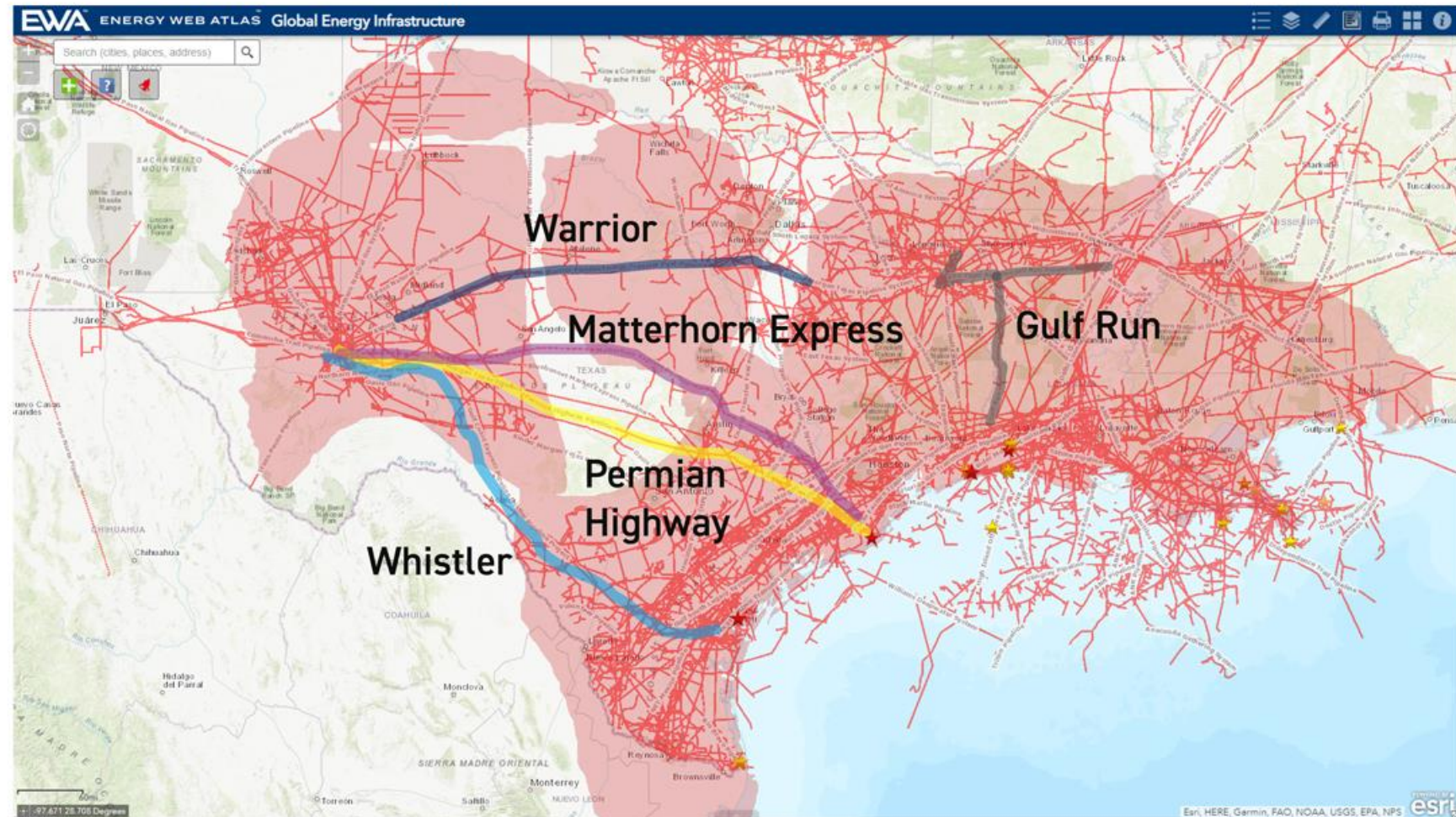
Map from Global Energy Infrastructure's





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## Expansions and new construction



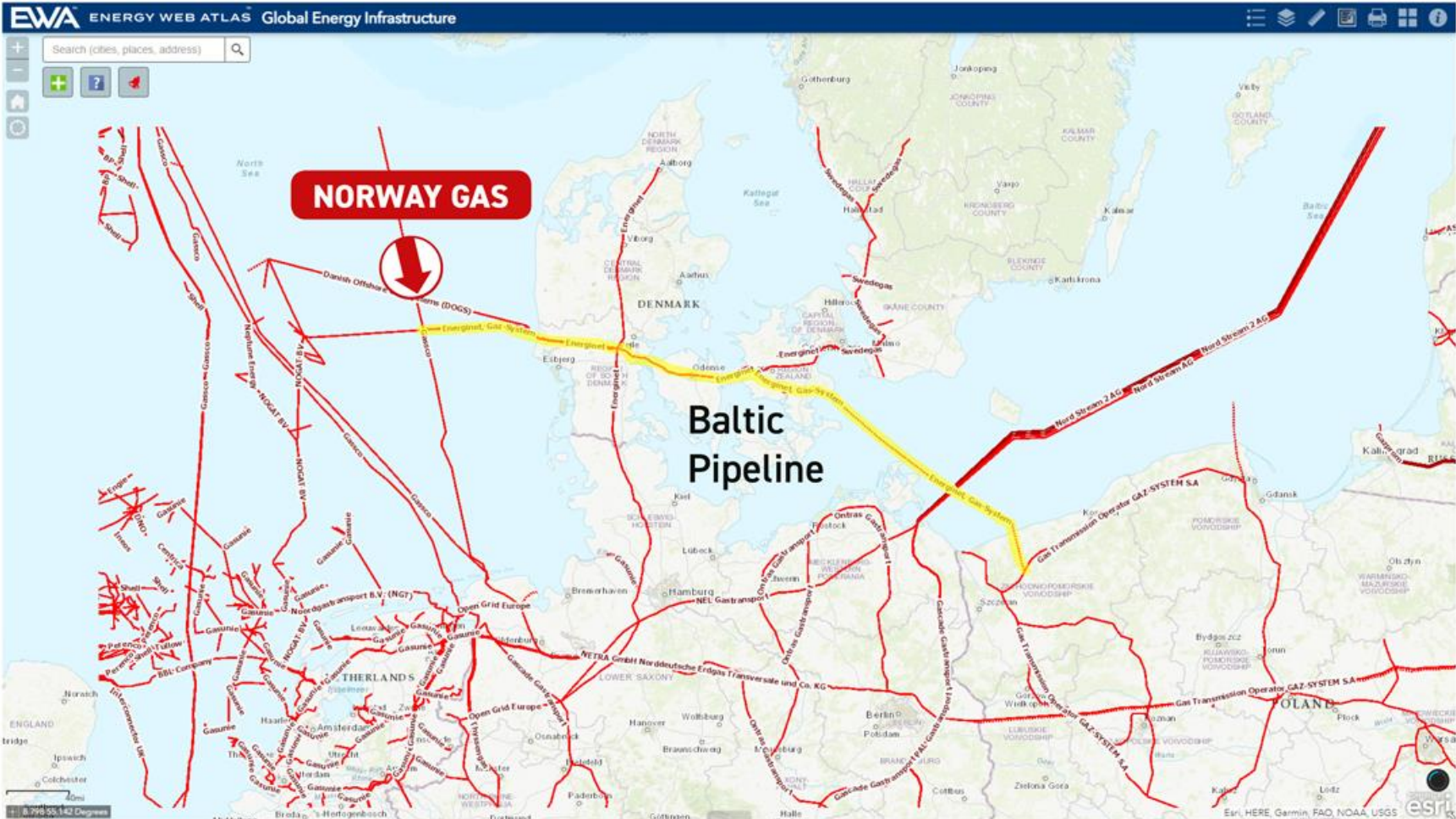
Map from Global Energy Infrastructure's





# Supplying Europe

## Baltic Pipe



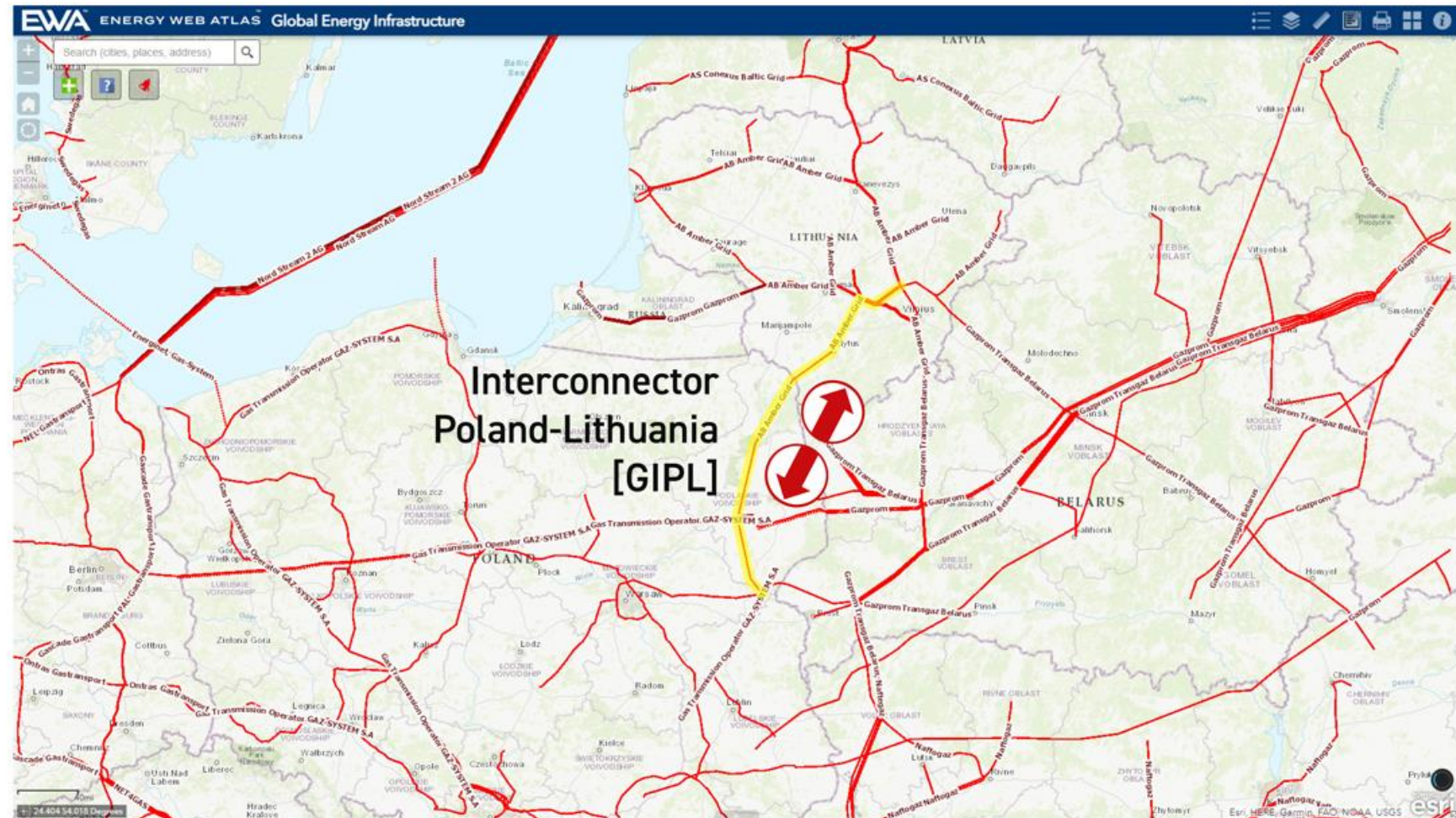
Map from Global Energy Infrastructure's





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## Interconnector Poland-Lithuania



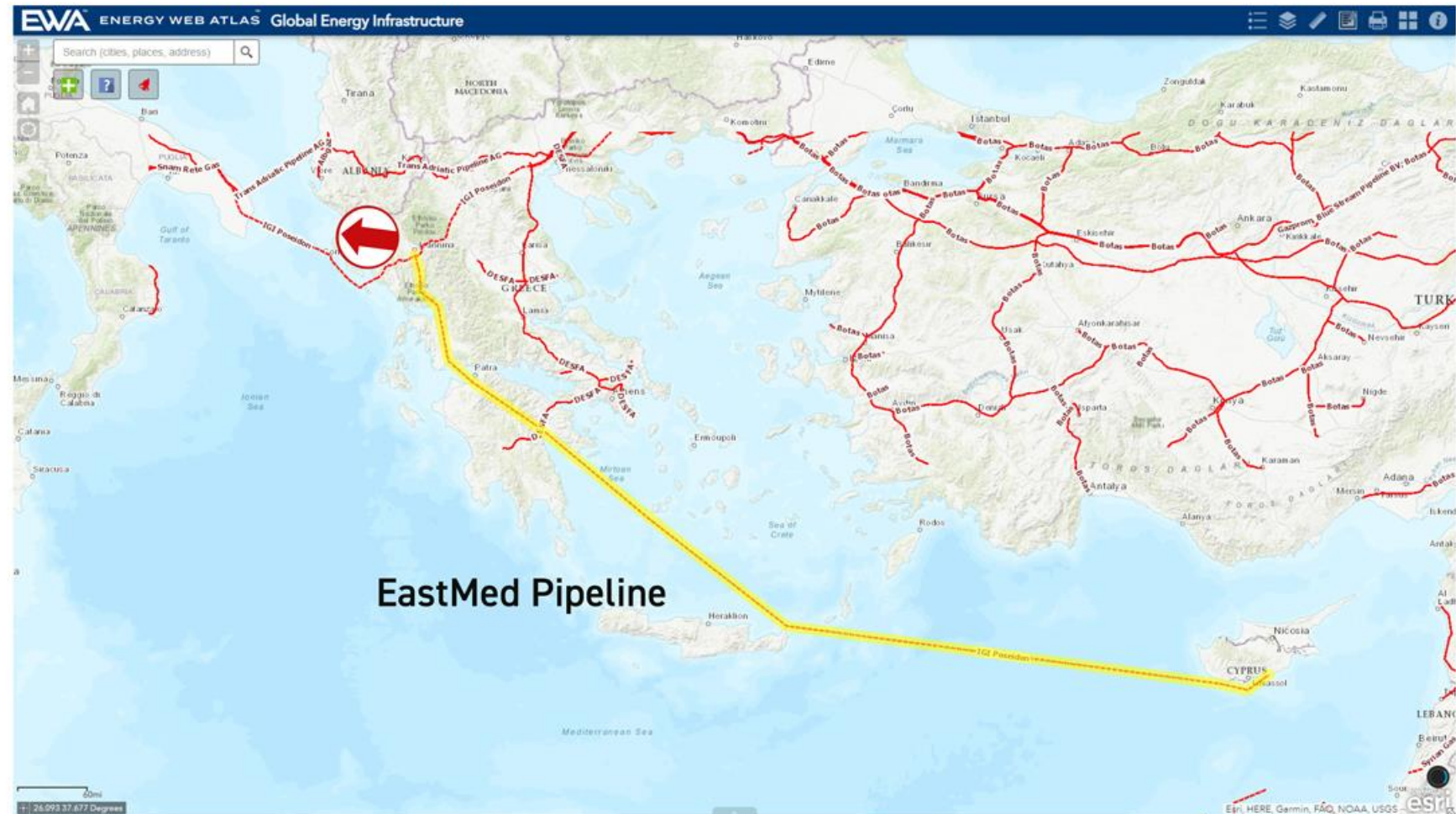
Map from Global Energy Infrastructure's





# Supplying Europe

## East Mediterranean Pipeline



Map from Global Energy Infrastructure's



## Summary

- **Europe's energy crisis raises priority of Energy Security alongside Energy Transition**
- Natural gas has cemented its role as the essential base energy resource
- **IEA Goal: EU 30% reduction in Russian imports within a year**
- Pricing and demand spurring midstream expansions in multiple regions to replace their exports
- **Europe and North America are focal points for pipeline and LNG infrastructure additions**
- Natural gas projects that add capacity fastest have been prioritized



## Q&A



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Senior Vice President, Media,  
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# THANK YOU



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