



ENERGY

Oil Markets, Midstream and Downstream

Enhance your decision making with the power of IHS Markit integrated solutions for Oil Markets, Midstream and Downstream.



Energy with IHS Markit is the leading source of information, analytics and expertise in the oil, gas, coal, power and renewable energy sectors

The depth and breadth of IHS Markit solutions gives our clients unmatched access to the world's foremost experts not only in the energy sector but also in closely related industries including petrochemicals, automotive, aerospace and defense, maritime, and technology, as well as in key disciplines that span those industries, from economics and country risk to supply chain management, engineering and product design.

With Oil Markets, Midstream and Downstream products, you can assess supply, demand, trade, prices and margins for crude, NGL, LPG and refined oil products, including lubricants. Quickly find country and regional data and analysis on markets, regulations, infrastructure, refineries, and fuel retail. Benchmark operational and financial performance of leading companies and dissect their strategies.

Oil Markets, Midstream and Downstream services inform your strategy by answering key research questions:

- How will non-OPEC supply develop in next 5 years? Where are key future sources of non-OPEC oil?
- How and when will refining margins narrow? Will volatility increase with new capacity coming online?
- What is the magnitude & impact of LPG subsidies, implications on trade?
- How will the financial performance of downstream companies change through the cycle of lower oil prices?
- Who stands to profit from new mid/downstream opportunities? Where are assets the most exposed?



Our Oil Markets, Midstream and Downstream offerings are broken down into four key capabilities:

Crude Oil Markets

- Prices, supply/demand, infrastructure & economics
- Geopolitics, OPEC strategy/behaviors, government policies & issues that impact short- & long-term oil markets
- Inter-regional trade balance

Midstream Oil & Natural Gas Liquids

- NGL & LPG supply, demand, trade & price/freight forecasts
- Identification of optimal feedstocks for petrochemical manufacturing
- A deep understanding of supply chain & infrastructure assets & systems

Refining & Marketing

- Country demand projections for fuels
- Refinery capacity, crude & feedstock qualities, throughput & utilization
- Retail motor fuel volumes & distribution, vehicle fleet, economic overview & oil logistics
- Lubricants analysis & data

Company Strategies & Performance

- Benchmarking for the refining & marketing businesses of major downstream operators
- Profiles & analysis to compare strategies, asset portfolios & operating metrics
- Financial performance benchmarking



Crude Oil Markets

Insight into all aspects of the oil market, including crude and product balances; fundamentals and regional level analysis, forecasts & reports

Access an exclusive combination of regularly updated oil market data and outlooks, covering production, supply, demand, trade & prices for crude by type (by region & country). Crude Oil Markets addresses geopolitics, OPEC strategies & behaviors, governmental policies & other issues that impact short- and long-term oil markets. Datasets & outlooks are weekly, monthly, quarterly & annual. The “IHS Markit view on oil” is your cornerstone for strategic planning & investment/risk management decisions. The outlook on crude supply/demand & pricing is the basis for your strategy development & budget planning.

Crude Oil Markets:

Covers supply, production, short-term & long-term prices, infrastructure and economics. Find produced streams data, production forecasts, trade by crude type and stream, as well as crude grade prices and market spreads at both regional and sub-regional level.

Canadian Oil Sands Dialogue:

An independent, balanced view on Canadian oil sands development by engaging and integrating the varying perspectives of key stakeholders through a series of custom workshops and peer-reviewed special reports.

Crude Oil Markets Light Analytics:

Crude Flow Model identifies crude, condensate and NGL flows between key producing and consuming regions at different points in the future.

Pricing Model offers a structural means to forecast a wide range of marker crudes and oil product prices under multiple scenarios.



Midstream Oil & NGLs

Natural Gas Liquids supply/demand, trade & pricing including freight in short & long term and the impact on petchem feedstock demand growth

Gain market-related insights & outlooks (NGL supply/demand, trade & price/freight forecasts) through a deep understanding of supply chain & infrastructure assets & systems. Project NGL demand growth & identify best potential in mature markets. Map E&P activity & refinery runs to NGL availability & long-term investment decisions in capacity & midstream infrastructure. Understand evolving NGL trade patterns and identify optimal feedstocks for petrochemical manufacturing.

NGL Markets:

Comprehensive coverage of regional and fundamental NGL markets which leverages IHS Markit proprietary market and modeling expertise to provide supply, demand and price forecasts, accompanied by in-depth insight, on ethane, propane, butanes and natural gasoline.

Petrochemical Feedstocks:

Supply, demand & price forecasts for petrochemical feedstocks - naphtha, ethylene, propylene, benzene & paraxylene in the Asia & Middle East region.

Waterborne LPG:

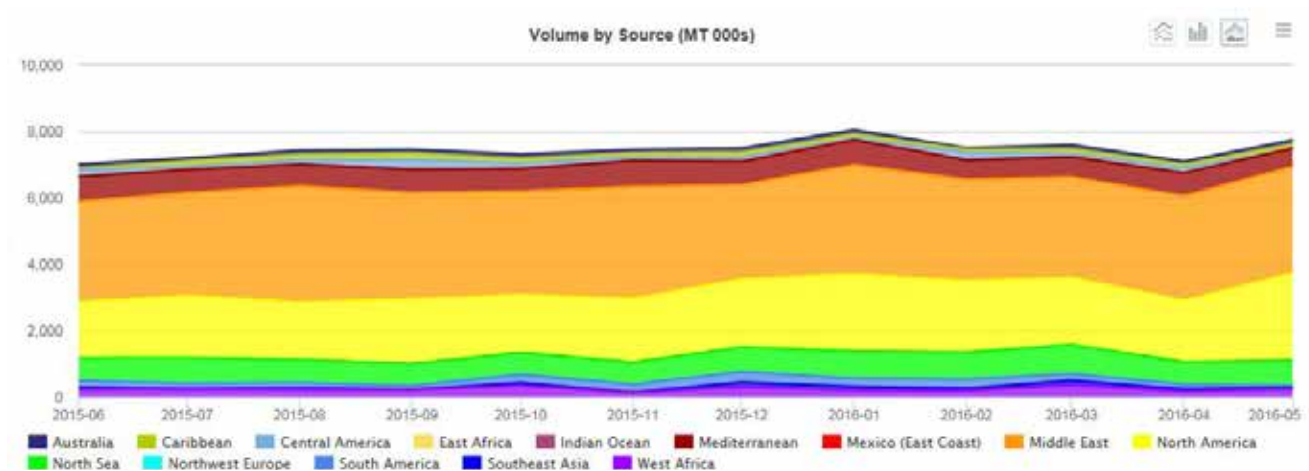
Access continuously updated waterborne LPG trade data & regular market analysis driven by detailed vessel-level information that is expert-vetted & available nowhere else.

Light & Heavy Naphtha:

Provides comprehensive global market analysis for light and heavy naphtha, including long-term supply, demand, trade, and price forecasts.

Midstream Essentials:

A unique spatially enabled global energy infrastructure & markets database enabling clients to identify access to midstream transport and processing options and to assess dependencies upstream and downstream of the facilities.





Refining & Marketing

Analysis on changing dynamics in the oil refining and marketing value chain around the world

An analytical view of downstream sector developments, including country-level supply/demand projections for refined products, allows you to identify market conditions conducive to future investment. Understand the relationship between refining industry market structure and profitability, refinery capacity and rationalizations by unit, crude and feedstock qualities, throughput, utilization rates and trade balances between regions by product streams. Retail motor fuel volumes & distribution, vehicle fleet, economic overview & oil logistics complete this detailed view of the refining and marketing value chain.

Refining & Marketing:

Screen for opportunities & monitor changing dynamics in refining, logistics, wholesale marketing & retail in regions around the world. Analyze supply, demand, regional trade by product (gasoline, diesel, jet fuel, and fuel oil, naphtha), refinery utilization, projects & rationalization. Access more the 150 downstream country profiles which include detail on units, capacities, yields, and feedstocks for every refinery around the world.

Global Lubricants:

Provides detailed industry data & analysis in business sector where reliable data is particularly scarce. Country & competitor profiles plus statistical updates & trend reports are updated on a regular basis.

Refining & Marketing Light Analytics Models:

Energy Demand Model provides a view of individual fuel demand growth within different demand sectors, on a country, regional and global level.

Product Supply/Demand Model is an interactive tool that allows you to assess how structural drivers across the entire value chain will impact future supply/demand.



Company Strategies & Performance

Downstream operations and financial performance benchmarking by peer group and refining and marketing strategy assessments for downstream operators

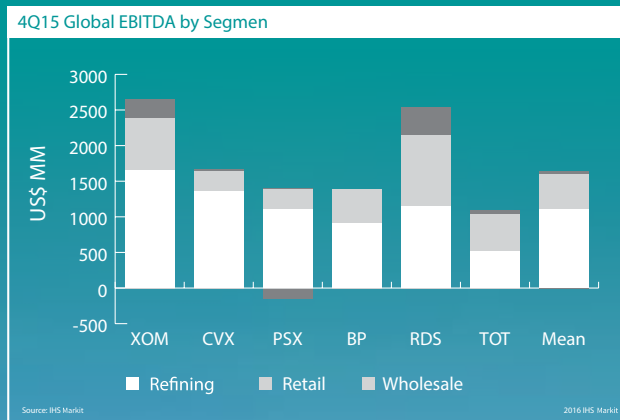
Company Strategies & Performance provides ongoing assessment and benchmarking of the refining & marketing business performance of major downstream operators. Understand detailed company strategies, asset portfolios, operating & financial metrics, summary of transactions, project status, and other industry trends and actions which impact downstream operations. The service ensures comparability across peer groups & downstream portfolios by adjusting reported values based on a stated methodology.

Company Strategies & Performance:

In-depth analysis of competitive strategies, operations, and performance of 30+ leading refining and marketing companies and includes quarterly downstream financial performance and competitive positioning.

Downstream Portfolio Model:

Analyzes published financials to provide a detailed understanding of the earnings and forecasts P&Ls and free cash flows of competitors.



Additional Oil Markets, Midstream and Downstream Offerings:

Our Energy Consulting collaborates with private and public downstream energy clients worldwide to size and rank markets, quantify refinery costs, develop resilient strategic plans, negotiate transactions, evaluate downstream oil and gas technologies, and much more. Past consulting topics include:

- Strategy & planning support including fully integrated long-term scenarios with detailed supply, demand & pricing projections
- Forecasts for lubricating base oil capacity, supply, demand, trade, prices, & manufacturing margins, consistent with Global Lubricants coverage
- Merger & acquisition support including commercial and technical due diligence assistance for pipelines, terminals, gas processing
- Asset valuation support, assisting buyers/sellers of refining, distribution and retail assets

Bring an IHS Markit expert speaker to your conference, event, Board presentation or strategic planning meeting. Our experts have presented on topics including downstream earnings, refinery restructuring in 2016, long term NGL outlook, crude and refined product storage.

For more information visit

www.ihsmarkit.com/products/oil-markets-downstream-data.html

ihsmarkit.com

About IHS Markit

IHS Markit (Nasdaq: INFO) is a world leader in critical information, analytics and solutions for the major industries and markets that drive economies worldwide. The company delivers next-generation information, analytics and solutions to customers in business, finance and government, improving their operational efficiency and providing deep insights that lead to well-informed, confident decisions. IHS Markit has more than 50,000 key business and government customers, including 85 percent of the Fortune Global 500 and the world's leading financial institutions. Headquartered in London, IHS Markit is committed to sustainable, profitable growth.

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