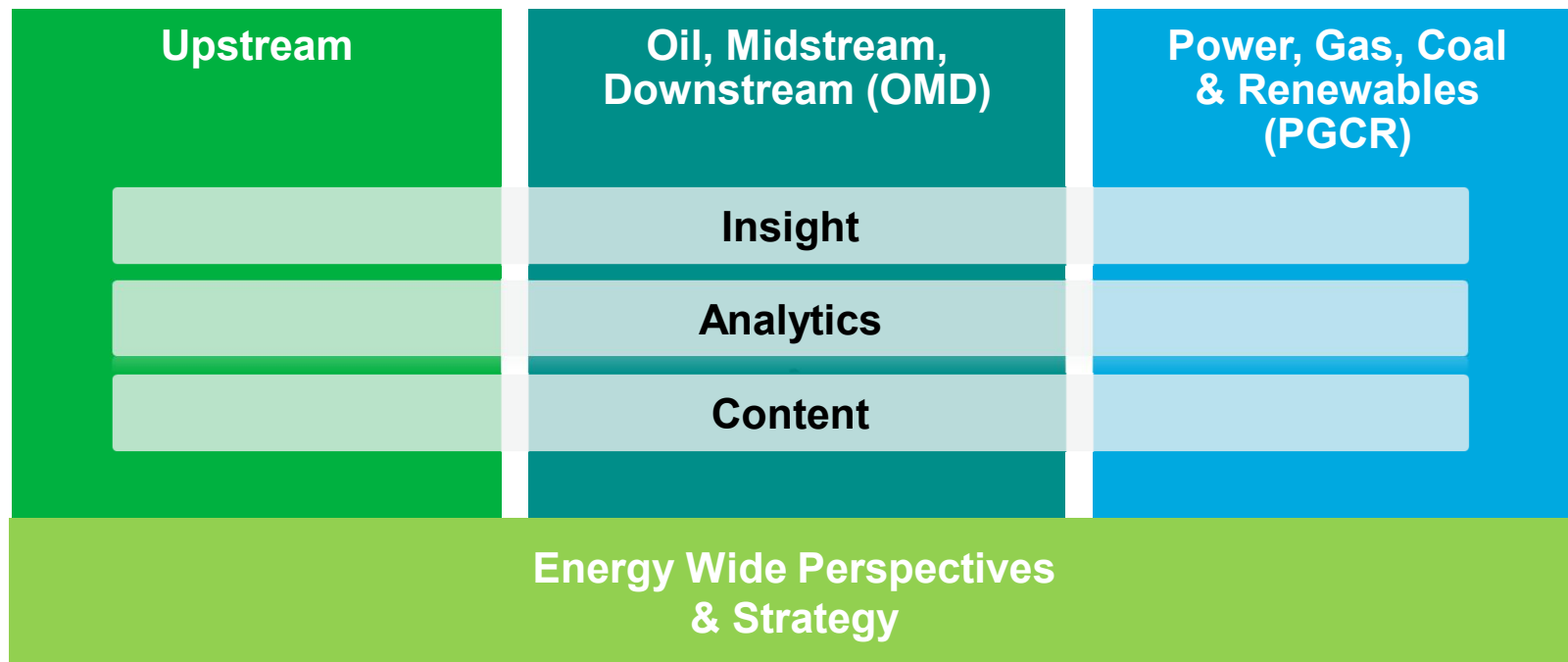




# NGL Markets

## IHS Energy

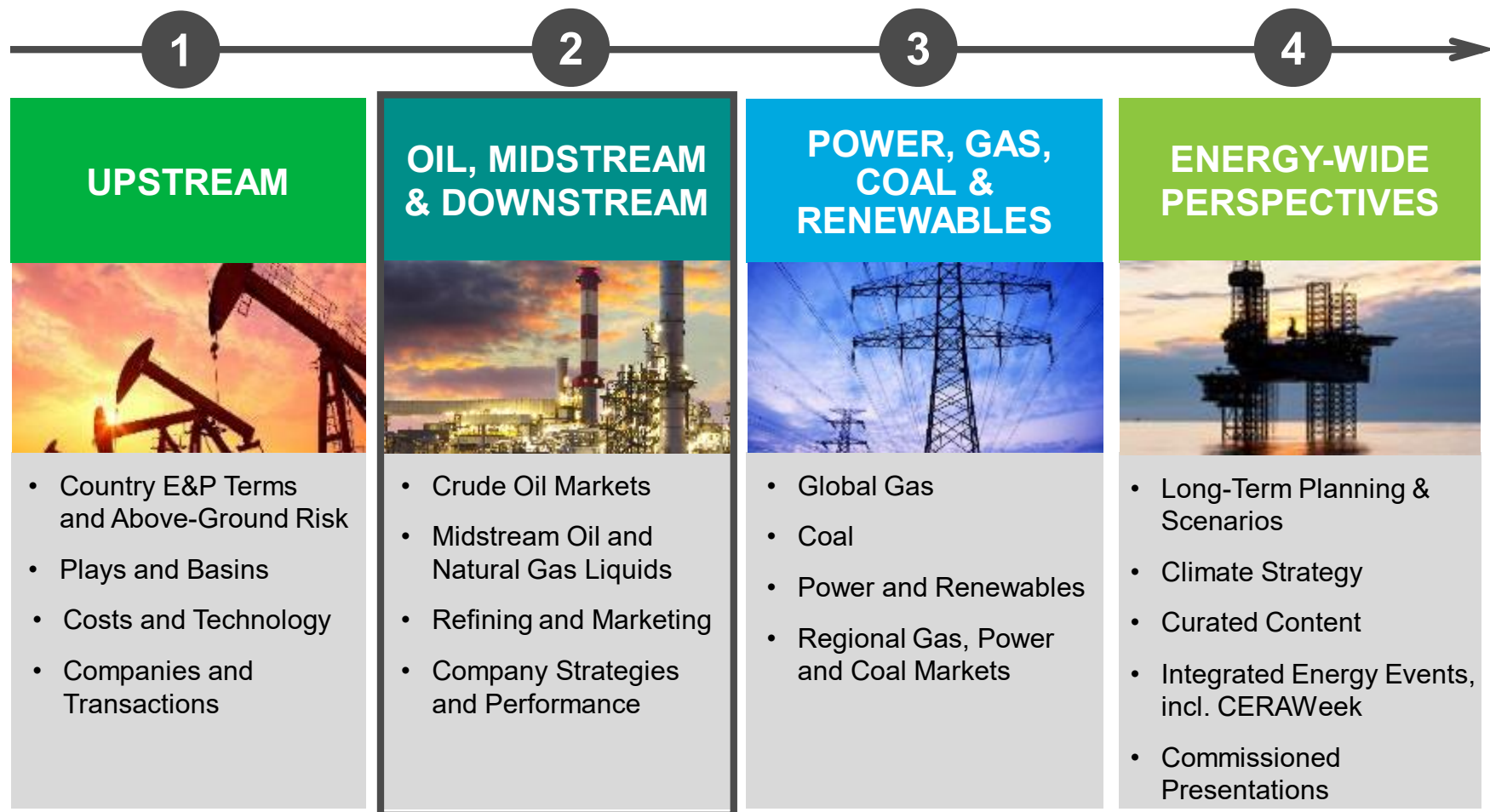
Brings together industry leading insight, analytics and content across workflows and geographies to help you make critical decisions with speed and confidence.



PLUS integrated content and analysis from across IHS Markit, Automotive, Maritime, Aerospace, Technology and Economics & Country Risk offerings.

# Harnessing IHS Energy to Support Your Business

Access the power of IHS Energy through four distinct energy segments for your online subscriptions and customer events.



## Oil, Midstream & Downstream

Assess supply, demand, trade, prices & margins for crude, NGL, LPG & refined oil products, including lubricants. Quick access to country & regional data & analysis on markets, regulations, infrastructure, refineries, & fuel retail. Benchmark operational & financial performance of leading companies and pinpoint strategies.

### 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 & Natural Gas Liquids



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

### Refining & Marketing

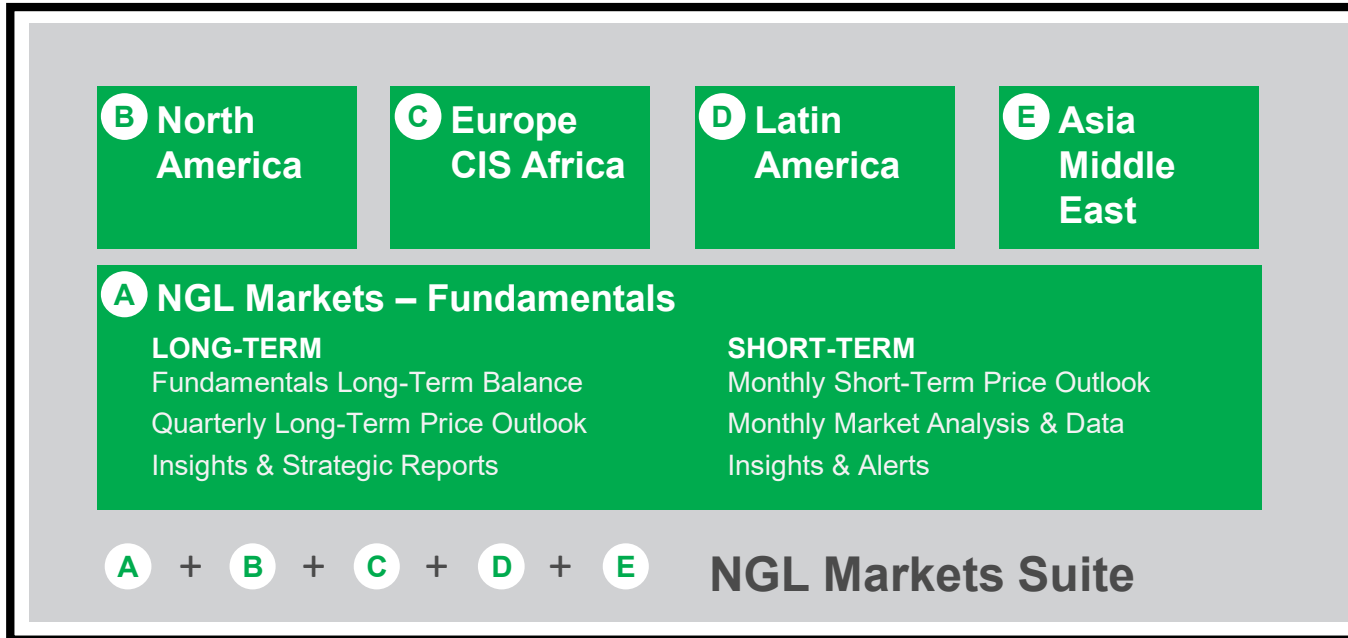


- Country demand projections for fuels
- Refinery capacity, crude & feedstock qualities, throughput & utilization
- Retail motor fuel volumes & distribution, vehicle fleet, economic overview & oil logistics
- Lubricants analysis & data

### 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



**4 regional NGL markets modules** provide exclusive analysis, short and long-term price, supply/demand & trade forecast data

**Foundational NGL Markets coverage** (both short- and long-term) on prices, supply/demand

**Global Storage Study**

**Special Storage Report**  
 Detailed analysis of key storage hubs to 2025 (report, datasets & Exec Summary presentation)

**Asia/ME Petchem Feedstock Markets**

Supply, demand & price forecasts for petchem feedstocks

**Light & Heavy Naphtha Service**

Analysis of global markets for both light & heavy naphtha

**Petchem feedstocks** analysis and data on supply, demand, trade, and price forecasts

**Waterborne LIVE LPG**

Continuously updated waterborne LPG trade data & regular market analysis

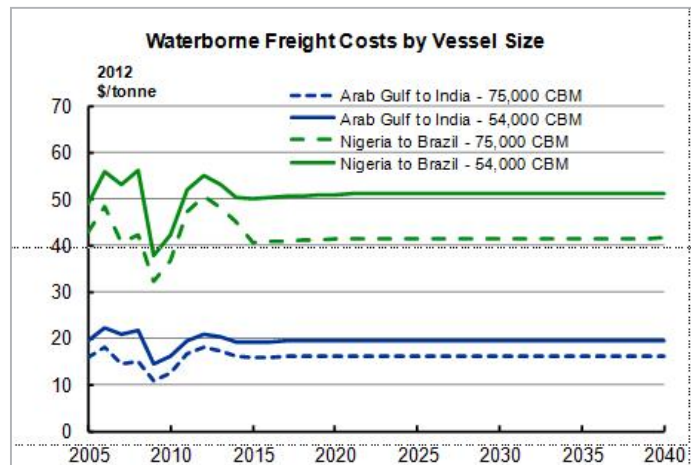
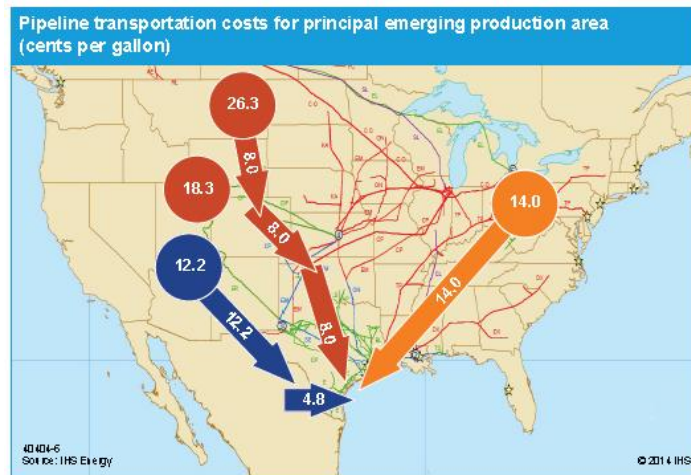
**Focus on LPG trade**  
 Continuously updated and detailed vessel-level information

## Understand the NGLs Value Chain

- NGL/LPG **production and trade patterns** have **changed dramatically** in recent years
- The **North American unconventional boom** has led to an enormous increase in NGL production and made the **United States a leading exporter**
- **Inexpensive natural gas & NGLs** have benefited petrochemical production in regions such as the Middle East & North America
- Collapsing crude prices have impacted other **petchem feedstocks** like naphtha, **further complicating** the NGL/LPG and refinery by-product picture
- IHS NGL Markets provides short & long-term NGL **price forecasts, supply/demand balances** and relevant analysis to better understand global & regional NGL/LPG markets
- IHS NGL markets is built on a **world class IHS foundation**:
  - > Waterborne LIVE LPG: **most accurate** waterborne propane, butane & **ethane trade data** in existence
  - > IHS Crude Oil Markets informed by extensive IHS Energy technical and upstream analysis & data, along with IHS Refining & Marketing on the **supply side**
  - > IHS Refining & Marketing, Chemical, Economics & Country Risk, Automotive, Maritime on the **demand side**



## Understand the NGLs Value Chain



### Content and deliverables:

- Monthly & quarterly price forecasts & data files
- Annual long-term supply & demand data & analysis
- Global module has global & regional supply/demand aggregations plus global benchmark prices
- Regional modules contain country-specific data & regional/local prices

### Benefits and functionality:

- Understand natural gas liquids supply, demand, pricing & trade, globally & regionally
- Coverage includes ethane, propane, butanes & natural gasoline
- Assess market factors such as supply sources, end uses & waterborne freight
- Make long-term investment decisions in capacity & infrastructure

## NGL Markets 2016-17 Enhancements

- **Enhanced NGL Service coverage:**
  - > Addition of Sweden & Portugal, as well European ethane pricing and feedstock economics in [NGL Markets Europe/CIS/Africa Short-Term Outlook](#)
  - > [NGL Markets Latin America Short-Term Outlook](#) added Peru, Colombia & Bolivia coverage and Key Highlights section translated to Spanish
  - > [NGL Markets Latin America Long-Term Outlook](#) report & data set now offered in Spanish
  - > Added Mont Belvieu NGL prices & expanded oil & gas pricing in [NGL Markets Fundamentals Short-Term Outlook](#)
- **Coverage of key NGL topics such as:**
  - > NGL infrastructure coverage (examples [India](#), [Canada](#), [NGL Markets North America Quarterly Infrastructure Update](#))
  - > Enhanced ethane coverage: [What Does the Future Hold for Waterborne Ethane Trade?](#)
  - > LPG trade: [The United States Is Now the World's Largest LPG Exporter, Shifting Global Trade Patterns](#)
- **Delivered 3 NGL webinars:**
  - > Global LPG Trade: Changes and implications over US supply
  - > [US Ethane Exports: Finding new markets](#)
  - > Global LPG Supply and Demand: Regional overviews

\*Entitled based on R&M regional module subscription



# NGL Markets Service Deliverables

Fundamentals

Asia/Middle East

Europe/CIS/Africa

Latin America

North America

	<b>Report deliverables</b>	<b>Frequency</b>	<b>Description</b>	<b>Location on Connect</b>
<b>NGL Markets All Modules</b>	Periodic Reports & Presentation Files	Periodic	Periodic reports offering insight on midstream & NGL business trends & critical issues, focusing on long-term implications, posted to Fundamentals and/or regional NGL modules as applicable. Includes presentations from IHS Energy meetings, conferences & webinars.	Capability Page: Midstream Oil & NGLs Tab: NGL Perspectives, Webinars & Events, Petrochemical Feedstocks
<b>NGL Markets Fundamentals</b>	NGL Markets Fundamentals (Global) Short-Term Outlook	Monthly	Presents highlights & forecasts of market prices, import & export trade flows, feedstock economics & selected supply trends for the principal NGL markets outside of North America -- including Europe (Northwest & Mediterranean), Middle East, North Africa, Far East & Latin America. Delivered with & supplements NGL Markets Fundamentals Short-Term Outlook data file.	Capability Page: Midstream Oil & NGLs Tab: Short-Term Outlook
	NGL Markets Fundamentals (Global) Long Term Price Outlook	Quarterly	Presents IHS Energy long-term outlook on global natural gas liquids benchmark prices. Delivered with & supplements NGL Markets Fundamentals Long-Term Outlook data file.	Capability Page: Midstream Oil & NGLs Tab: Long-Term Outlook
	NGL Markets Fundamentals (Global) Long-Term Supply/Demand & Trade Outlook	Annual	Presents IHS Energy long-term outlook on global & regional NGL supply/demand & trade aggregations. Delivered with & supplements NGL Markets Fundamentals Long-Term Supply Demand Trade Outlook data file.	Capability Page: Midstream Oil & NGLs Tab: Long-Term Outlook

	Data deliverables	Frequency	Description	Location on Connect
NGL Markets Fundamentals	NGL Markets Fundamentals Short-Term Outlook	Monthly	Data supporting highlights & forecasts of market prices, import & export trade flows, feedstock economics & selected supply trends for the principal NGL markets outside of North America -- including Europe (Northwest & Mediterranean), Middle East, North Africa, Far East & Latin America. Delivered with & supplements NGL Markets Fundamentals Short-Term Outlook presentation slides.	Capability Page: Midstream Oil & NGLs Tab: Short-Term Outlook
	NGL Markets Fundamentals Long-Term Price Outlook	Quarterly	Data supporting IHS Energy long-term outlook on global natural gas liquids benchmark prices. Delivered with & supplements NGL Markets Fundamentals Long-Term Outlook presentation slides.	Capability Page: Midstream Oil & NGLs Tab: Long-Term Outlook Primary Tools/Analytics & Charts: OMD Data Browser, Natural Gas Liquids
	NGL Markets Fundamentals (Global) Long-Term Supply Demand Trade Outlook	Annual	Data supporting IHS Energy long-term outlook on global & regional NGL supply/demand & trade aggregations. Delivered with & supplements NGL Markets Fundamentals Long-Term Supply Demand Trade Outlook presentation slides.	Capability Page: Midstream Oil & NGLs Tab: Long-Term Outlook Primary Tools/Analytics & Charts: OMD Data Browser, Natural Gas Liquids

	Report deliverables	Frequency	Description	Location on Connect
Asia/Middle East NGL Markets	Asia/Middle East/Pacific NGL Markets Short-Term Outlook	Monthly	Presents highlights about important market developments & trends in Asia/Middle East/Pacific production, demand, trade, inventories & pricing of key NGL products. Delivered with & supplements Asia/Middle East/Pacific NGL Markets Short-Term Outlook data files.	Capability Page: Midstream Oil & NGLs Tab: Short-Term Outlook
	Asia/Middle East/Pacific NGL Markets Long-Term Price Outlook	Quarterly	Presents IHS Energy long-term outlook on Asia/Middle East/Pacific natural gas liquids prices. Delivered with & supplements Asia/Middle East/Pacific NGL Markets Long-Term Price Outlook data file.	Capability Page: Midstream Oil & NGLs Tab: Long-Term Outlook
	Asia/Middle East/Pacific NGL Markets Long-Term Supply Demand Outlook	Annual	Presents IHS Energy long-term supply, demand & net trade outlooks for countries in Asia/Middle East/Pacific. Delivered with & supplements Asia/Middle East/Pacific NGL Markets Long-Term Supply Demand Outlook data file.	Capability Page: Midstream Oil & NGLs Tab: Long-Term Outlook

	Data deliverables	Frequency	Description	Location on Connect
Asia/Middle East NGL Markets	Asia/Middle East/Pacific NGL Markets Short-Term Outlook	Monthly	Data supporting analysis of important market developments & trends in Asia/Middle East/Pacific production, demand, trade, inventories & pricing of key NGL products. Delivered with & supplements Asia/Middle East/Pacific NGL Markets Short-Term Outlook presentation slides.	Capability Page: Midstream Oil & NGLs Tab: Short-Term Outlook
	Asia/Middle East/Pacific NGL Markets Long-Term Price Outlook	Quarterly	Data supporting IHS Energy long-term outlook on Asia/Middle East/Pacific natural gas liquids prices. Delivered with & supplements Asia/Middle East/Pacific NGL Markets Long-Term Price Outlook data file.	Capability Page: Midstream Oil & NGLs Tab: Long-Term Outlook Primary Tools/Analytics & Charts: OMD Data Browser, Natural Gas Liquids
	Asia/Middle East/Pacific NGL Markets Long-Term Supply Demand Outlook	Annual	Data supporting long-term supply, demand & net trade outlooks for countries in Asia/Middle East/Pacific. Delivered with & supplements Asia/Middle East/Pacific NGL Markets Long-Term Supply Demand Outlook presentation slides.	Capability Page: Midstream Oil & NGLs Tab: Long-Term Outlook Primary Tools/Analytics & Charts: OMD Data Browser, Natural Gas Liquids

	Report deliverables	Frequency	Description	Location on Connect
Europe/CIS/ Africa NGL Markets	Europe/CIS/Africa NGL Markets Short- Term Outlook	Monthly	Presents highlights about important market developments & trends in Europe/CIS/Africa production, demand, trade, inventories & pricing of key NGL products. Delivered with & supplements Europe/CIS/Africa NGL Markets Short-Term Outlook data file.	Capability Page: Midstream Oil & NGLs Tab: Short-Term Outlook
	Europe/CIS/Africa NGL Markets Long- Term Price Outlook	Quarterly	Presents IHS Energy long-term outlook on Europe/CIS/Africa natural gas liquids prices. Delivered with & supplements Europe/CIS/Africa NGL Markets Long-Term Price Outlook data file.	Capability Page: Midstream Oil & NGLs Tab: Long-Term Outlook
	Europe/CIS/Africa NGL Markets Long- Term Supply Demand Outlook	Annual	Presents IHS Energy long-term supply, demand & net trade outlooks for countries in Europe/CIS/Africa . Delivered with & supplements Europe/CIS/Africa NGL Markets Long-Term Supply Demand Outlook data file.	Capability Page: Midstream Oil & NGLs Tab: Long-Term Outlook



	Data deliverables	Frequency	Description	Location on Connect
Europe/CIS/ Africa NGL Markets	Europe/CIS/Africa NGL Markets Short- Term Outlook	Monthly	Data supporting analysis of important market developments & trends in Europe/CIS/Africa production, demand, trade, inventories & pricing of key NGL products. Delivered with & supplements Europe/CIS/Africa NGL Markets Short-Term Outlook data file.	Capability Page: Midstream Oil & NGLs Tab: Short-Term Outlook
	Europe/CIS/Africa NGL Markets Long- Term Price Outlook	Quarterly	Data supporting IHS Energy long-term outlook on Europe/CIS/Africa natural gas liquids prices. Delivered with & supplements Europe/CIS/Africa NGL Markets Long-Term Price Outlook presentation slides.	Capability Page: Midstream Oil & NGLs Tab: Long-Term Outlook Primary Tools/Analytics & Charts: OMD Data Browser, Natural Gas Liquids
	Europe/CIS/Africa NGL Markets Long- Term Supply Demand Outlook	Annual	Data supporting long-term supply, demand & net trade outlooks for countries in Europe/CIS/Africa . Delivered with & supplements Europe/CIS/Africa NGL Markets Long-Term Supply Demand Outlook presentation slides.	Capability Page: Midstream Oil & NGLs Tab: Long-Term Outlook Primary Tools/Analytics & Charts: OMD Data Browser, Natural Gas Liquids

	Report deliverables	Frequency	Description	Location on Connect
Latin America NGL Markets	Latin America NGL Markets Short-Term Outlook	Monthly	Presents highlights about important market developments & trends in Latin America production, demand, trade, inventories & pricing of key NGL products. Delivered with & supplements Latin America NGL Markets Short-Term Outlook data file.	Capability Page: Midstream Oil & NGLs Tab: Short-Term Outlook
	Latin America NGL Markets Long-Term Price Outlook	Quarterly	Presents IHS Energy long-term outlook on Latin America natural gas liquids prices. Delivered with & supplements Latin America NGL Markets Long-Term Price Outlook data file.	Capability Page: Midstream Oil & NGLs Tab: Long-Term Outlook
	Latin America NGL Markets Long-Term Supply Demand Outlook	Annual	Presents IHS Energy long-term supply, demand & net trade outlooks for countries in Latin America, including Mexico. Delivered with & supplements Latin America NGL Markets Long-Term Supply Demand Outlook data file.	Capability Page: Midstream Oil & NGLs Tab: Long-Term Outlook

	Data deliverables	Frequency	Description	Location on Connect
Latin America NGL Markets	Latin America NGL Markets Short-Term Outlook	Monthly	Data supports analysis on important market developments & trends in Latin America production, demand, trade, inventories & pricing of key NGL products. Delivered with & supplements Latin America NGL Markets Short-Term Outlook presentation slides.	Capability Page: Midstream Oil & NGLs Tab: Short-Term Outlook
	Latin America NGL Markets Long-Term Price Outlook	Quarterly	Data supporting IHS Energy long-term outlook on Latin America natural gas liquids prices. Delivered with & supplements Latin America NGL Markets Long-Term Price Outlook presentation slides.	Capability Page: Midstream Oil & NGLs Tab: Long-Term Outlook
	Latin America NGL Markets Long-Term Supply Demand Outlook	Annual	Data supporting long-term supply, demand & net trade outlooks for countries in Latin America, including Mexico. Delivered with & supplements Latin America NGL Markets Long-Term Supply Demand Outlook data file.	Capability Page: Midstream Oil & NGLs Tab: Long-Term Outlook Primary Tools/Analytics & Charts: OMD Data Browser, Natural Gas Liquids

	Report deliverables	Frequency	Description	Location on Connect
North America NGL Markets	NGL Economics Weekly	Weekly	Presents a five-week rolling summary of the most current spot prices for US Gulf Coast natural gas liquids, crude oil & natural gas, refined petroleum products & chemicals, including ethylene plant operating costs & plant economics.	Capability Page: Midstream Oil & NGLs Tab: NGL Economics Weekly
	North America NGL Markets Short-Term Outlook	Monthly	Presents highlights about important market developments & trends in US & Canadian production, demand, trade, inventories & pricing of each NGL product, including ethane, propane, normal & isobutane & natural gasoline. Delivered with & supplements North America NGL Markets Short-Term Outlook data file.	Capability Page: Midstream Oil & NGLs Tab: Short-Term Outlook
	North America NGL Markets Long-Term Price Outlook	Quarterly	Presents IHS Energy long-term outlook on North America natural gas liquid prices. Delivered with & supplements North America NGL Markets Long-Term Price Outlook data file.	Capability Page: Midstream Oil & NGLs Tab: Long-Term Outlook
	North America NGL Markets Infrastructure Update	Quarterly	Comprehensive review of North American NGL infrastructure, includes report & separate map set in PDF. Delivered with & supplements Quarterly NGL Markets Infrastructure Update data file.	Capability Page: Midstream Oil & NGLs Tab: Midstream Infrastructure Update
	North America NGL Markets Long-Term Supply Demand Outlook	Annual	Provides outlook for natural gas liquid (NGL) supply/demand balance, & trade for the US & Canada. Delivered with & supplements North America NGL Markets Long-Term Supply Demand Outlook data tables.	Capability Page: Midstream Oil & NGLs Tab: Long-Term Outlook

	Data deliverables	Frequency	Description	Location on Connect
North America NGL Markets	North America NGL Markets Short-Term Price Outlook	Monthly	Data supporting highlights of important market developments & trends in US & Canadian production, demand, trade, inventories & pricing of each NGL product, including ethane, propane, normal & isobutane & natural gasoline. Delivered with & supplements North America NGL Markets Short-Term Outlook presentation slides.	Capability Page: Midstream Oil & NGLs Tab: Short-Term Outlook
	North America NGL Markets Long-Term Price Outlook	Quarterly	Data supporting IHS Energy long-term outlook on North America natural gas liquid prices. Delivered with & supplements North America NGL Markets Long-Term Price Outlook presentation slides.	Capability Page: Midstream Oil & NGLs Tab: Long-Term Outlook Primary Tools/Analytics & Charts: OMD Data Browser, Natural Gas Liquids
	North America NGL Markets Infrastructure Update	Quarterly	Comprehensive dataset on North American NGL infrastructure, including pipelines, storage, fractionators, processing plants, marine terminals & more. Delivered with & supplements North America NGLs Infrastructure Update report.	Capability Page: Midstream Oil & NGLs Tab: Midstream Infrastructure Update
	North America NGL Markets Long-Term Supply Demand Outlook	Annual	Data supporting outlook for natural gas liquid (NGL) supply/demand balance, & trade for the US & Canada & various subregions. Delivered with & supplements North America NGL Markets Long-Term Supply Demand Outlook presentation slides.	Capability Page: Midstream Oil & NGLs Tab: Long-Term Outlook Primary Tools/Analytics & Charts: OMD Data Browser, Natural Gas Liquids