

North American Midstream Infrastructure: Investment and Demand Outlook through 2052

A new report from the INGAA Foundation finds that natural gas will remain the backbone of the North American energy system through 2052. Meeting projected demand across the United States and Canada will require significant infrastructure investment as natural gas demand grows, driven by rising electricity use from data centers, power demand, and LNG exports.

**Scope:**

United States and Canada

**Timeframe:**

2022-2052

**Scenarios Modeled:**Business-as-Usual Reference Case
and Low-Carbon Scenario¹

By the numbers

To meet North American energy demand, we'll need:

\$1.2-\$1.4Tin cumulative midstream
infrastructure
investment (2022\$)**12-24M**cumulative jobs over 25
years or 414,000-828,000
jobs annually**39%**increase in natural gas
capacity from 2022**37,000+**miles of new natural gas
transmission pipelines**12.4M**in added horsepower
(compression/pump power)**103,000**miles of natural gas
gathering lines

Even with variations in projected LNG demand and data center growth, natural gas demand remains robust through 2052, driving continued infrastructure development.

¹ The Reference Case assumes the current policies that were in effect on April 1, 2025 remain largely unchanged (updated to reflect H.R. 1 Bill and EIA's June 2025 Short Term Energy Outlook). The Low Carbon Scenario assumes existing state and provincial climate commitments remain in place and are enforced throughout the report's timeframe.

Natural Gas & Data Centers

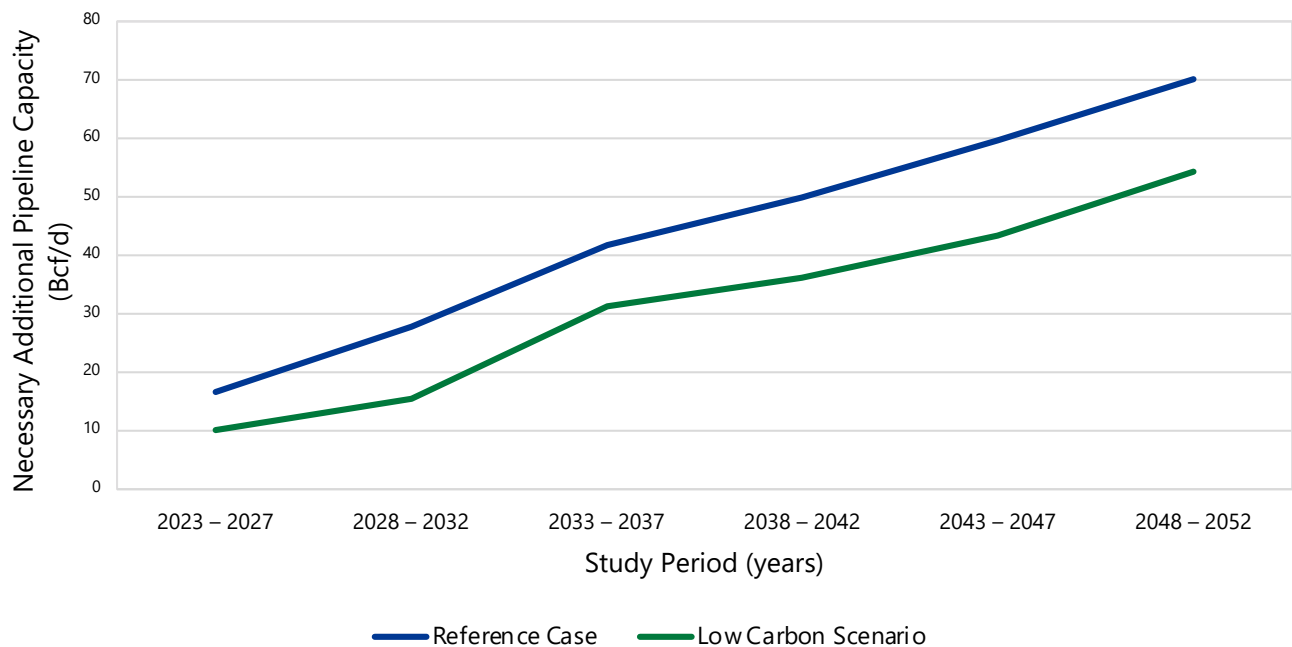
- DOE projects data center electricity consumption could reach **800 TWh annually by 2052**, up from 300 TWh in 2025
- Natural gas remains the largest single fuel source for U.S. electricity generation, particularly during periods of rapid load growth

LNG Exports and Global Demand

- LNG exports are the single largest source of incremental gas demand
- U.S. LNG exports **more than triple by 2052** under both modeled scenarios
- Growth supported by abundant domestic supply, competitive pricing, and rising global energy demand
- In the Low Carbon scenario, LNG demand is further reinforced as importing countries displace higher-emissions fuels

The study indicates electricity generation increases, natural gas consumption increases, and natural gas production increases.

Natural Gas Pipeline Outlook



About INGAA Foundation:

The INGAA Foundation (Foundation) was formed in 1990 by the Interstate Natural Gas Association of America (INGAA) to facilitate the construction and operation of natural gas pipelines for the benefit of the consuming public and the natural gas industry. The Foundation is a not-for-profit 501(c)(6) trade association based in Washington, DC.

The Foundation is uniquely positioned as the forum to convene industry leaders who will develop and deliver safe, affordable, reliable, clean energy solutions into the future through creative problem solving using networking and collaborative efforts, fostering individual and workforce development, and assuring that key industry decision makers are well-informed.

For more information or questions, please visit www.ingaa.org/foundation.



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