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## COASTAL BEND MIDSTREAM PROGRAM

### **Industry Pulse: What 2025 Convention Attendees Say Are Midstream's Biggest Challenges**

By Thomas Kalb, Director

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Uncertainty about regulatory and logistics issues were top-of-mind concerns in one-on-one interviews of 100 attendees of the 2025 GPA Midstream Convention, held Sept. 21-24 in San Antonio.

During the convention, I spoke with 100 random people on the convention floor and asked: "What do you think is the most important issue facing the midstream industry today?"

The intentionally open-ended question encouraged attendees to share their thoughts and engage in a discussion about the industry and its future.

Uncertainty dominated concerns, with regulatory issues identified as the primary source. Power supply, planning, and lead time for equipment were also frequently mentioned. System capacity was a distant but important second-place concern, while loss of expertise due to retirements — perennially a top issue — ranked third.

1	Uncertainty		47%
	regulatory	26%	
	power supply	9%	
	planning	8%	
	lead time	4%	
2	System Capacity		14%
3	Retirements		8%
4	Reliability/Resilience		7%
5	Training		6%
6	Contaminants		4%
7	Upgrading Technology		4%
7	Consolidation		4%
8	Miscellaneous		6%
			100%

The shift in national political leadership was supposed to alleviate concerns about the regulatory environment — and it did, dropping from 35% in 2023 to 26% in 2025. However, the fact that regulation remains the top concern highlights the reality that regulatory change is a slow-moving process.

Interestingly, public ignorance — ranked as the second-biggest concern in 2024 — fell off the list entirely this year. This may be an important oversight by respondents.

Since the 2024 Convention survey, the midstream sector has moved from an environment driven by governmental policy constraints to an industry driven by new market dynamics focused on artificial intelligence and liquefied natural gas demand.

These newly energized sources of capacity demand and system growth contribute to the uncertainty and show up in concerns about system capacity, reliability/resilience, training, contaminants, upgrading technology, and consolidation. This demand growth also magnifies the issue of the loss of experienced people retiring.

Many of the midstream industry's biggest challenges can be directly addressed by companies:

#### 1. **Uncertainty**

While regulatory concerns are the primary source of uncertainty, 21% of respondents cited power, planning, and lead time as top issues. Companies can

reduce their uncertainty by identifying and adopting best practices for managing power supply, planning, and lead times. This could involve aggressively revisiting strategies, staffing, and processes. Companies could also gear employee compensation to incentive improving performance on these issues or enhancing pricing bonuses for early delivery and completion. Time is money.

## **2. Retirements and Training**

Companies can mitigate effects of an aging workforce and recruiting challenges with specific actions. For example, executives can consider modifying mandatory retirement ages and instituting term-limited retention policies for critical people. Companies should reassess existing training programs to ensure they're meeting business needs and then make targeted investments. These actions may enable companies to better meet the requirements of the current AI and LNG-driven capacity expansion, as well as some of the issues underlying uncertainty.

## **3. Reliability/Resilience, Contaminants and Upgrading Technology**

The importance of these issues is magnified by the rapid change in the midstream industry. Uncertainty, rapid demand growth, and consolidation are not conducive to consistent high-quality operations and upgrading technologies in the field in a timely manner. Reassessment and investing in the areas where a company can directly act may provide relief.

Most companies are already aggressively managing areas where they have control, but there's always room to improve. Given the challenges facing the industry, companies have every reason to pursue a path of continuous improvement.

In last year's survey, 26% of respondents identified public ignorance as the second most critical industry challenge; this year, only one person did. This change is likely due to the shifting national political landscape, but the one certainty about political landscapes is that they continue to evolve.

Last year's attendees said the right path for industry leaders and organizations such as GPA Midstream is to constructively and aggressively engage with regulatory and political leaders to enable them to make the best, practical decisions for our energy system. This advice from last year's GPA Convention attendees is still valid.

Energy industry leaders and professional organizations should collaborate more to educate society and policymakers on energy matters. Top priorities include simplifying

complex energy topics into digestible and engaging content. This effort would need to include educating people about the tradeoffs, pace, and materials and supply challenges of changing the energy system.

GPA Midstream has a strong history of working cooperatively with regulatory agencies and legislators to achieve practical solutions to statutory and regulatory goals. To contribute to this effort, consider joining a GPA Midstream committee. These groups offer a platform for industry peers to collaborate, comment on regulatory proposals, and advocate on behalf of midstream interests.

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