

Petroleum Whitespace & saturation

A synthetic analysis for a hypothetical data and analytics provider.
Company names are real; commercial figures and customer relationships are invented.

\$5.41M

Modeled annual whitespace across 12 selected company groups.

\$7.20M

Modeled potential

\$1.79M

Captured revenue

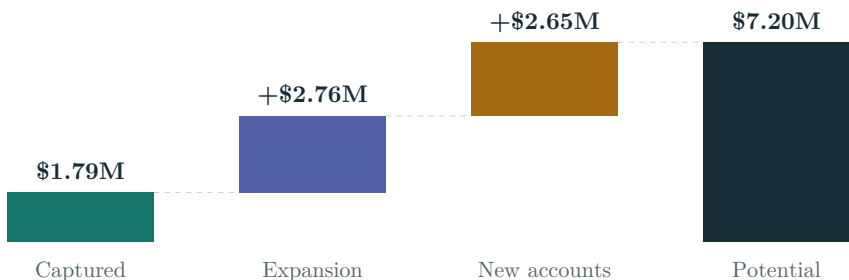
24.9%

Value saturation

Coverage is broad; depth is limited.

Seven of 12 accounts are covered (58.3%), yet only 24.9% of modeled value is captured. Whitespace comprises \$2.76M of expansion and \$2.65M across five new-account hypotheses.

Annual opportunity bridge

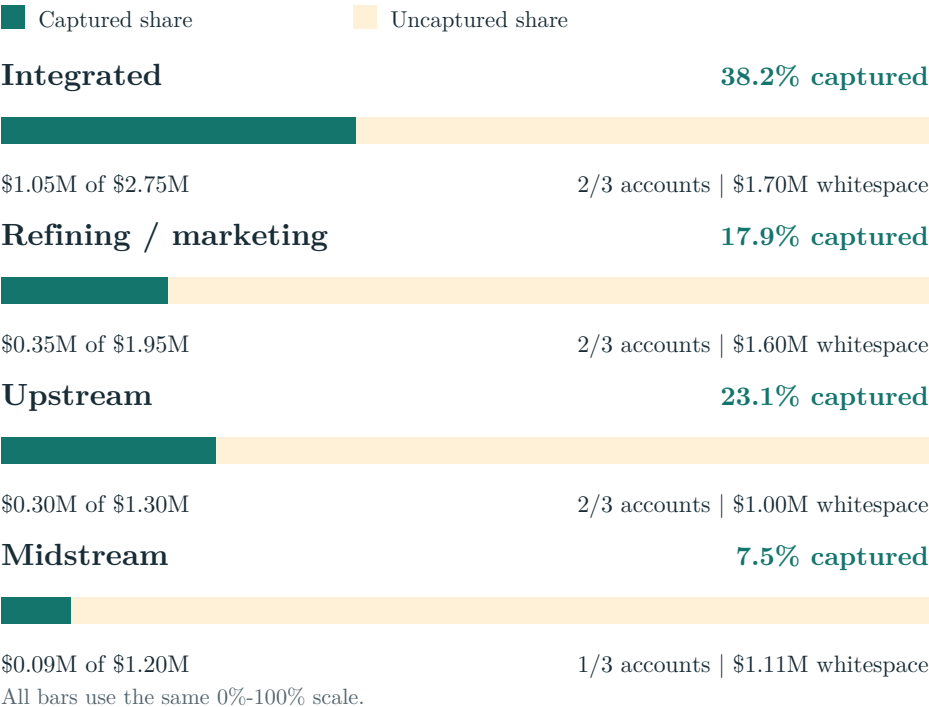


First move

Qualify Shell and Marathon Petroleum for new business, and Phillips 66 for expansion: \$2.06M, or 38.1%, of the modeled gap. This is a discovery priority, not a revenue forecast.

Where coverage is thin

Value saturation measures captured revenue / modeled potential. Account coverage measures positive-revenue accounts / selected accounts. Both are calculated within each segment.



What this changes

Midstream is least penetrated: 7.5% of value captured and a \$1.11M gap. Low coverage flags an opportunity to investigate; it does not prove demand.

Integrated companies hold the largest gap: \$1.70M, versus \$1.60M in refining / marketing. Priorities need both percentage and dollar context.

Concentration: ExxonMobil and Chevron contribute 58.7% of current modeled revenue. Balance expansion with new-account diversification.

Account opportunity

Synthetic annual USD thousands. Captured = revenue for the hypothetical seller, not the petroleum company's revenue. Shaded rows have zero captured revenue in this invented dataset.

Company / source	Captured	Potential	Gap	Capture
Integrated				
ExxonMobil [1]	600	1,000	400	60.0%
Chevron [2]	450	900	450	50.0%
Shell [3]	0	850	850	0.0%
Upstream				
ConocoPhillips [4]	180	500	320	36.0%
EOG Resources [5]	0	350	350	0.0%
Occidental [6]	120	450	330	26.7%
Refining / marketing				
Valero [7]	210	600	390	35.0%
Marathon Petroleum [8]	0	700	700	0.0%
Phillips 66 [9]	140	650	510	21.5%
Midstream				
Enterprise Products [10]	90	450	360	20.0%
Kinder Morgan [11]	0	400	400	0.0%
ONEOK [12]	0	350	350	0.0%
Total	1,790	7,200	5,410	24.9%

Read a zero correctly: no seller revenue was assigned in this example. This does not establish real buying status or unmet need. Validate entity matches and missing records before declaring a real account unserved.

Which offers have room?

Each cell is synthetic annual whitespace in USD thousands. Product potential is allocated 40% to risk intelligence, 35% to commercial analytics and 25% to entity data for every account.

Company	Risk	Commercial	Entity data
ExxonMobil	100	150	150
Chevron	160	165	125
Shell	340	297.5	212.5
ConocoPhillips	80	115	125
EOG Resources	140	122.5	87.5
Occidental	60	157.5	112.5
Valero	90	150	150
Marathon Petroleum	280	245	175
Phillips 66	180	227.5	102.5
Enterprise Products	90	157.5	112.5
Kinder Morgan	160	140	100
ONEOK	140	122.5	87.5
Total whitespace	1,820	2,050	1,540

0% captured Above 0%, below 50% 50% or more

Commercial analytics leads.

Commercial analytics has \$2.05M of modeled whitespace. Phillips 66, Occidental and Enterprise Products contribute \$542.5K of it with no assigned revenue in this product family.

Color shows captured share; amounts show remaining opportunity. Neither establishes real purchasing intent.

From gap to discovery

Prioritize the three largest modeled account gaps. These are research and qualification priorities; no buyer need, access or budget has been confirmed.

1. Shell | \$850K | New-account hypothesis

Test risk intelligence or entity data with a business sponsor. Validate identity, incumbent coverage and procurement access before sizing a pursuit.

2. Marathon Petroleum | \$700K | New-account hypothesis

Test supplier or commercial-analytics needs. Resolve parent/subsidiary relationships and confirm procurement ownership.

3. Phillips 66 | \$510K | Expansion hypothesis

Validate the \$227.5K commercial-analytics gap. Confirm unmet needs and existing contract rights before proposing another offer.

How sensitive is the opportunity?

Change all potential assumptions by the same amount; hold captured revenue at \$1.79M. This tests model scale, not company-specific uncertainty.

Potential case	Potential	Whitespace	Capture
25% lower	\$5.40M	\$3.61M	33.1%
Base	\$7.20M	\$5.41M	24.9%
25% higher	\$9.00M	\$7.21M	19.9%

Shell and Marathon Petroleum remain first and second. In the higher-potential case, Chevron edges Phillips 66 for third by \$2.5K. The expansion ranking is sensitive to assumptions.

Decision gate: reconcile the revenue baseline; verify entity matching, product eligibility and contract coverage; then confirm buyer need and budget. Only qualified opportunities should enter pipeline.

How this sample fits

Companion to the implementation case study: a possible executive deliverable, not a production agent run. Company names and broad business activities are real; all commercial data is invented.

Synthetic: every commercial figure, relationship, product mix and opportunity. Potential is an assigned annual spending assumption for the hypothetical seller's offer. It is not a researched company budget or the size of the petroleum industry.

Scope: 12 selected global parent accounts across petroleum and related natural-gas businesses. Each group is counted once in an illustrative segment. Synthetic annual baseline: September 30, 2026. This is not a census or total addressable market.

Formulas: whitespace = potential minus captured revenue. Value saturation = total captured / total potential. Account coverage = positive-revenue accounts / selected accounts. New-account and expansion gaps are mutually exclusive and sum to total whitespace.

No live GL, CRM, Fabric or D+ data was queried. Nothing here states whether these companies use Dun & Bradstreet products. All model totals reconcile across accounts, segments and products.

Primary sources / checked October 11, 2026

- [1] ExxonMobil - Global organization
- [2] Chevron - Company description, October 5, 2026
- [3] Shell - What we do
- [4] ConocoPhillips - About us
- [5] EOG Resources - March 2026 fact sheet
- [6] Occidental - Performance production
- [7] Valero - Oil refining
- [8] Marathon Petroleum - About MPC
- [9] Phillips 66 - History and business portfolio
- [10] Enterprise Products - About us
- [11] Kinder Morgan - Company prospectus, July 28, 2026
- [12] ONEOK - What we do