NNPC Limited
Gas Master Plan
2026

NNPC
Energy for today
Energy for tomorrow

Intentionally left blank

NNPC Limited
Gas Master Plan
Driving Exponential Growth Through Value Adding Partnerships and Cost Efficiency.
2026

CHIEF SPONSOR'S STATEMENT OF COMMITMENT

Nigeria stands at a defining inflection point in its energy journey. With 37.5 billion barrels of proven oil reserves and 209.26Tcf of proven gas, with an upside potential of up to 600Tcf, Nigeria possesses one of the most consequential hydrocarbon basins in the world. Combined with bold reforms such as the Petroleum Industry Act (PIA) and the government's long-term Gas-Centric Energy Transition Plan, the nation is uniquely positioned to accelerate sustainable economic growth and global energy leadership.

Building on this foundation, NNPC Limited's Gas Master Plan (GMP) 2026 sets forth a commercially driven, execution-anchored roadmap to transform Nigeria into a globally competitive gas hub. This plan is built to deliver the Presidential mandate of increasing national gas production to 10 BCF/D by 2027 and 12 BCF/D by 2030, while catalysing over USD 60 billion in new investments across the oil and gas value chain by 2030.

The NNPC Gas Master Plan is anchored on NNPC's contribution to delivering Nigeria's strategic gas production targets of 10 BCF/D by 2027 and 12 BCF/D by 2030, while systematically advancing 3P resources into bankable 2P reserves. It prioritises cost optimisation and operational excellence across the entire gas value chain and strengthens supply to power, CNG, LPG, Mini- LNG, and key industrial off-takers. Central to this agenda is the commitment to eliminate routine gas flaring by 2027, minimise reinjection, and accelerate deep water gas development to close critical infrastructure gaps. The plan also unlocks growth for Gas-Based Industries (GBIs), reinforces strategic assets such as AAGP and EWOGGS, expands national processing capacity, and operationalises gas hub models for greater efficiency. To attract global capital, the framework institutionalizes a competitive willing buyer–willing seller commercial regime designed to deepen market liquidity and enhance investor confidence.

The Federal Government of Nigeria, under the leadership of His Excellency President Bola Ahmed Tinubu, GCFR, has further reinforced investor confidence through targeted fiscal incentives, tax credits, exemptions, and investment-friendly policies, designed to position Nigeria as the preferred destination for global energy capital.

Under my leadership, NNPC Limited has adopted a stronger collaborative, investor-centric approach to developing the GMP 2026. This edition represents deeper alignment with the Decade of Gas Initiative, industry stakeholders, partners, and investors, ensuring that Nigeria's gas opportunity is unlocked with speed, disciplined execution, and shared value

creation. Our achievements to date, including the development of a robust Gas Hub Concept, comprehensive mapping of supply to demand, and flexible export/domestic supply strategies, form a solid operational base for accelerated delivery.

As the Chief Sponsor of this transformative agenda, I reaffirm my full commitment to providing the leadership, strategic oversight, resources and leadership required to achieve the bold milestones before us. The NNPC 2026 Work Plan will be executed with precision, discipline, and accountability.

I call on all stakeholders' operators, investors, policymakers, and the broader gas ecosystem to work closely with the GMP Implementation Assurance Team to ensure full realisation of Nigeria's gas potential. Together, we will unlock unprecedented value, attract global investments, power industries, and elevate Nigeria as a prosperous, energy-secure nation.

I am counting on your continued partnership and steadfast support as we deliver on this shared vision.

Engr. Bashir Bayo Ojulari
Group Chief Executive Officer,
NNPC Limited.

NNPC GMP Key Pillars

Strategic Roadmap for Gas Development and Infrastructure

01 Market Driven Gas Development

Prioritising demand-led growth and commercial viability in the gas sector.

02 Decade of Gas Support

Consistent coordination with Decade of Gas supporting efforts to resolve Power Sector challenges.

03 Leading Global GBI Hub

Ensuring Nigeria becomes a leading Gas-Based Industry (GBI) Hub.

04 Effective Implementation of Yearly Development Plan

Effective delivery and monitoring of the yearly Gas Development Plan.

05 LPG Expansion

Enabling LPG expansion to 5M tons/annum and availability of 30M cylinders and reticulation in urban centers.

06 Presidential Mandate

Attaining 10Bcfd and 12Bcfd gas production by 2027 and 2030, respectively.

07 Infrastructure Gap

Closing the gas deliverability and infrastructure gap across the nation.

08 Efficiency & Optimisation

Promoting operational efficiency and cost optimization for sustainability.

09 Supply Demand Balancing

Ensure good balance between Gas supply and market demand

Contents

Executive Summary

Nigeria holds one of the world's largest proven natural gas reserves, yet significant portions remain undeveloped or underutilised. The country's gas sector is at a pivotal point with rising global and domestic demand, major national priorities and the importance of gas in contributing to industrial growth and energy security. A modernised and investment-ready NNPC Gas Master Plan ('NNPC GMP') is now in place, to drive gas utilisation and unlock major investment opportunities.

NNPC GMP provides the national blueprint for this ambition. It builds on the foundations of the 2008 Gas Master Plan and introduces a more integrated, commercially focused, and execution-driven approach designed to unlock supply at scale, strengthen gas infrastructure, improve system flexibility, and deliver tangible value over the next five years.

Key Levers and Drivers

NNPC GMP is driven by a valuable set of levers. To mention a few; the Decade of Gas (DoG) initiative, the Gas Aggregation Company of Nigeria (GACN), the Independent Petroleum Producers Group (IPPG) and the Oil Producers Trade Section (OPTS), all align on the plans to enhance gas utilisation. The Petroleum Industry Act (PIA) of 2021 frames the legal, the governance and the fiscal framework for the industry.

NNPC GMP also relies on certain key drivers for success. The Presidential mandate calls for the supply of at least 10Bcf/d by 2027 and 12 Bcf/d by 2030. To align with best in class our gas commercialisation target is to achieve 75% of gas produced by 2027, up from 60% today, and 80% by 2030. The NNPC GMP also aims to attain sustainability and Environmental, Social & Governance (ESG) targets while eliminating routine gas flaring by 2027.

These key levers and drivers make the overall plan deeply embedded in the country's commitment to transition to a gas driven economy.

A Backbone for Operational Success

NNPC GMP is framed within a strong operational backbone to support delivery:

- A unified data platform, improved data governance, and continuous update mechanisms provide digital transparency.
- A comprehensive risk register identifies challenges and provides mitigation strategies for each category to support decision-making.
- A clear governance structure with implementation accountability for a dedicated GMP Implementation Head supported by cross-functional teams.

Strategic Focus Areas and Target Deliverables

The Plan has been strategically designed around five key focus areas that integrate into a coherent whole. The aim to increase and to monetise Nigeria's gas supply effectively is supported by cost optimisation efforts around efficient Gas Hubs and complementary infrastructure projects, alongside improved gas supply and demand. (Exhibit 1)

Exhibit 1: NNPC GMP Strategic Focus Areas

Together, these focus areas and deliverables create a structured action plan that aligns stakeholders behind measurable outcomes and investment priorities while integrating current national and global energy conditions.

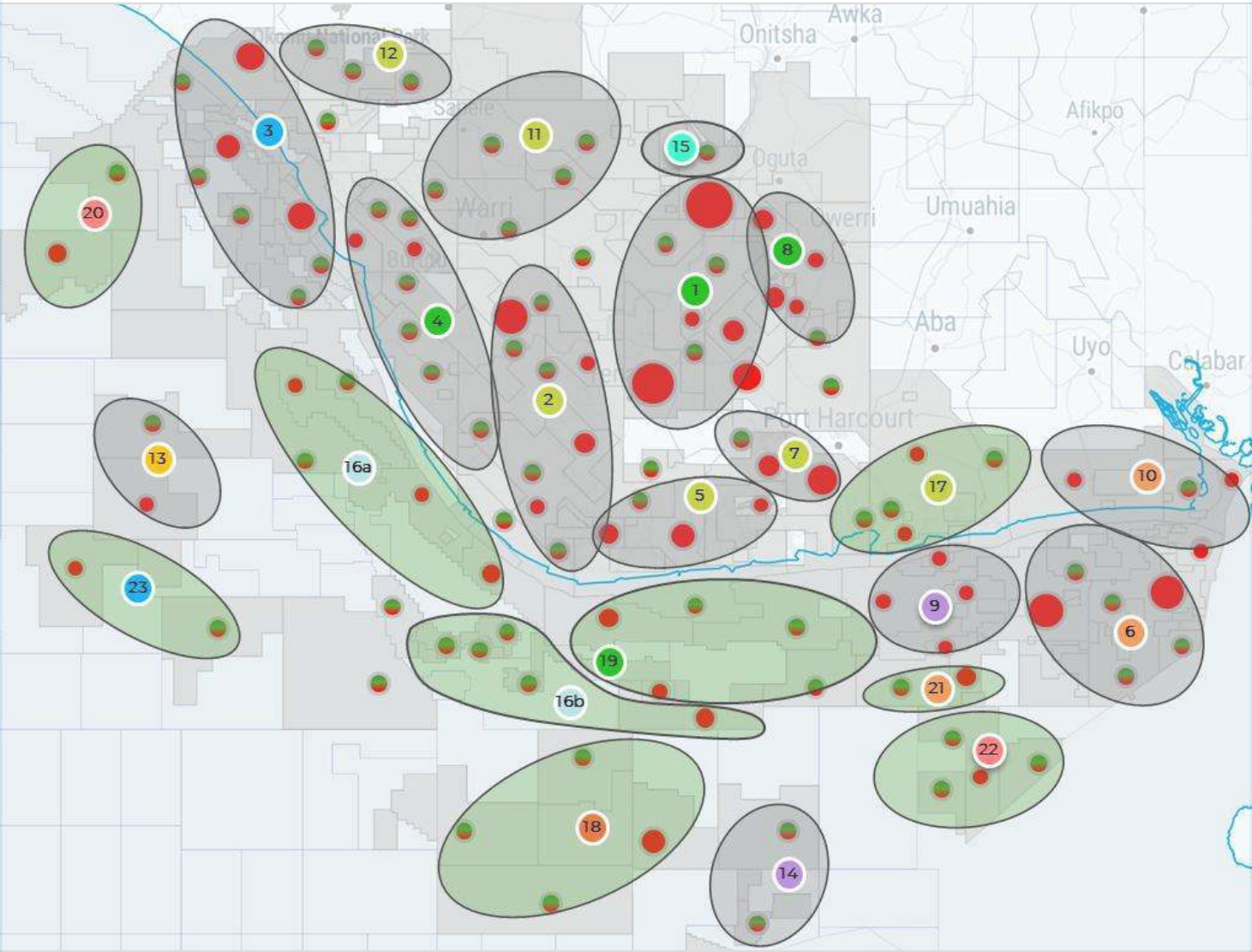
Gas Hub Concept

NNPC GMP is built as a hub-based development model that clusters gas assets based on specific criteria. The hub ranking exercise identifies 23 high-potential hubs that will drive most of Nigeria's gas supply growth in the near to medium term.

This approach coordinates development across multiple fields, reduces duplication of infrastructure, lowers unit development costs, and optimises the overall system.

Nigeria's gas resource base is large and geographically concentrated. There are 7 high-readiness Hubs primed for CPF expansion, most notably are Gbaran-Soku-Obagi-OBOB Hub with a CPF capacity of 5.2bcf/d and a planned expansion of 1.1 bcf/d; Utorogu-Ughelli-Okpokonou-Iseni-Brass Hub with CPF capacity of 600 mmscf/d and a planned expansion of 1.2 bcf/d which includes the ongoing NAG-3 and Assa North Hub with a capacity of 550mmscf/d and planned expansion of 600mmscf/d.

Altogether, the 7 Hubs account for about 60% of quoted 2P Gas reserves. Of the 23 identified hubs, 6 require new CPFs, led by the Anyala-Funiwa-Ofrima-Madu with a proposed capacity of 500mmscf/d and the Zabazaba- Agbami-Nwa Doro with a proposed capacity of 600mmscf/d.



A Network Fully Capable of Meeting Market Demand

NNPC GMP views the gas system as an interconnected network of upstream hubs, processing facilities and midstream pipelines where these must be jointly managed and orchestrated to meet gas demand.

National gas demand is expected to reach over 11bcf/d by 2027 and over 12bcf/d by 2030. This growth is driven by LNG expansion, industrial growth (Power, Gas Based Industries (GBIs), Compressed Natural Gas (CNG), Industrial Parks) and Pipeline opportunities.

Some of the key projects include LNG such as OKLNG, UTM FLNG; Power such as Kano and Abuja IPPs; GBIs such as Brass, Blackrose, Dangote fertilizer, Indorama and pipeline projects such as the African Atlantic Gas Pipeline (AAGP), and Trans-Saharan Gas pipeline (TSGP).

Priority supply plans from key Hubs have been identified to meet this demand including Gbaran-Soku-Obagi-OBOB, Utorogu-Ughelli-Okpokonou-Iseni-Brass and Assa North for 2027 whilst Escravos, EAP_QIT_Uquo_Qua Ibo_Utapate and Anyala_Funiwa_Ofrima_Madu for 2030.

To achieve these targets, infill wells and facility revamps for Gbaran and Utorogu and the Renaissance Midstream/GP completion for Assa North and completion of EOWEP, development of Utapate reserves and CPF development at Anyala amongst others will be crucial.

The key gas hubs have been mapped to major export and domestic demand centres with required midstream infrastructure for connectivity identified.

For example, key LNG demand centres such as NLNG Trains 7 & 8 have potential gas supply from Oso_BRT_NLNG, Anyala_Funiwa_Ofrima_Madu, Cawthorne Channel_Nembe_Awoba _Belema, Okoloma_Bodo Hub and Ima_Tubu_Bonny delivering via GTS-4, OGGS and B-NAG lines respectively. Key power projects such as Kano IPP, GIPP Abuja will be potentially supplied from Assa North via the AKK and GBIs like Dangote fertilizer will be supplied from Odidi-Iseni-Okpokonou via the new ELPS-Lekki line, among others.

These strategic efforts are being enabled by several key enablers such as funding, governance, digitalisation, and data governance.

Consequently, with the NNPC GMP in place, Nigeria has the resource depth to meet national targets by addressing infrastructure bottlenecks and expanding supply in a timely and coordinated manner to match local and global gas demand.

CHAPTER 1

Introduction

Nigeria's Tremendous Gas Potential Still Needs To Be Unlocked

Nigeria possesses vast gas resources. It boasts the **largest proven reserves in Africa with ~ 210 trillion cubic feet (TCF)** and ranks in the top 10 countries with the largest gas reserves worldwide, showing huge potential to meet domestic demand and become a key global player.

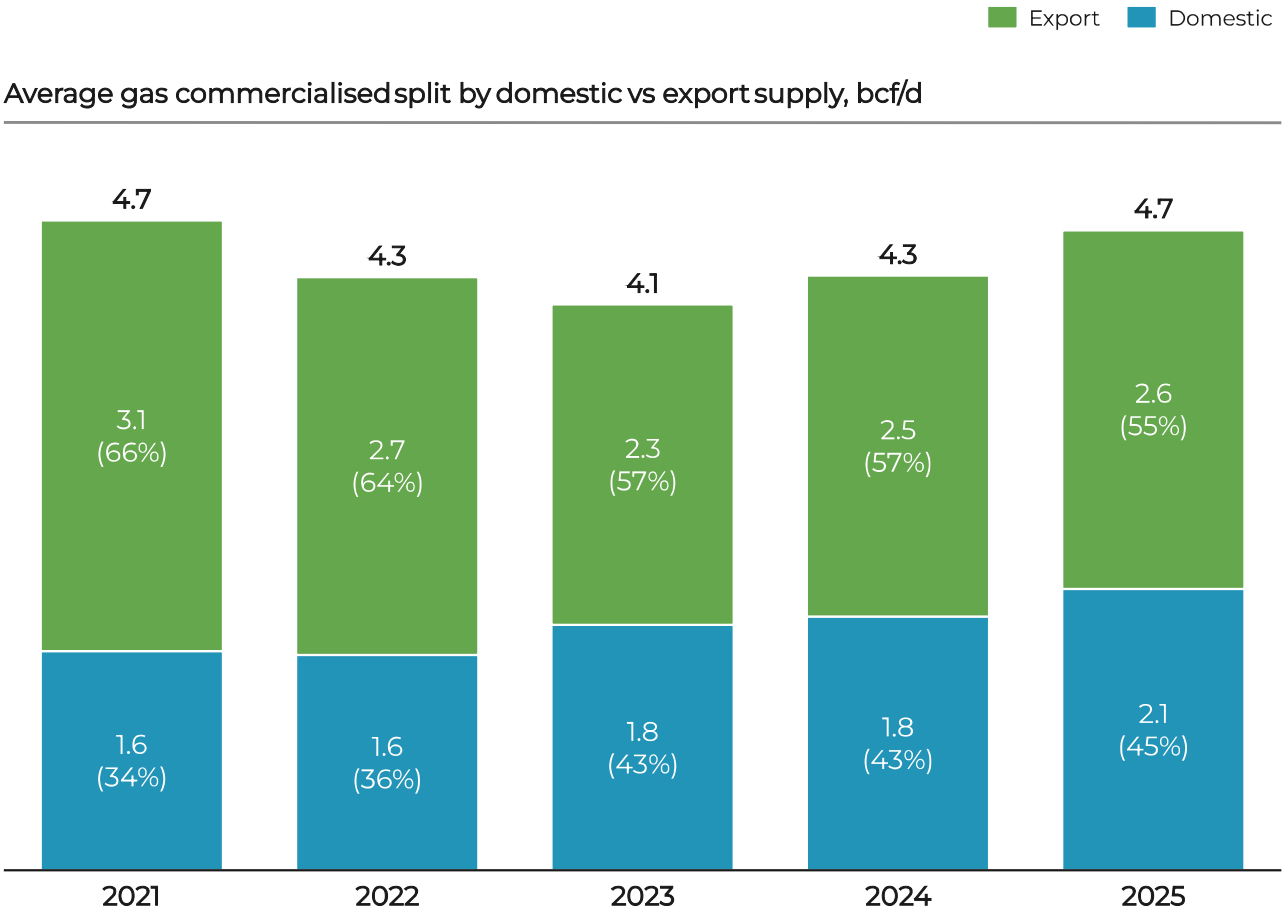
Despite this impressive ranking, **Nigeria only comes 16th in production globally**. This highlights significant untapped potential for growth and investment to unlock these gas resources.

The Nigerian gas sector presents several key features/highlights:

- Nigeria's large reserves are composed of ~48% associated gas reserves (101TCF) and ~52% non-associated gas reserves (110TCF).
- Nigeria's 2025 gas production stands at ~7.5bcf/d. However, Commercialised gas production is ~60% of this at 4.6bcf/d. Over 10% of gas is flared (7th largest in the world) and ~30% used as reinjected gas.

Over the last 5 years, Commercialised gas production has hovered between 4.1bcf/d to 4.7bcf/d. Commercial gas production has recovered and supply to the domestic market has increased by ~6% from 1.6bcf/d to 2.0bcf/d since 2021, with additional volumes expected to go to the domestic market in coming years based on recent and expected FIDs. (Exhibit 2)

Exhibit 2: Nigeria's Gas Commercialised Reached 4.7bcf/d As Of 2025



Source: Nigerian Upstream Regulatory Commission

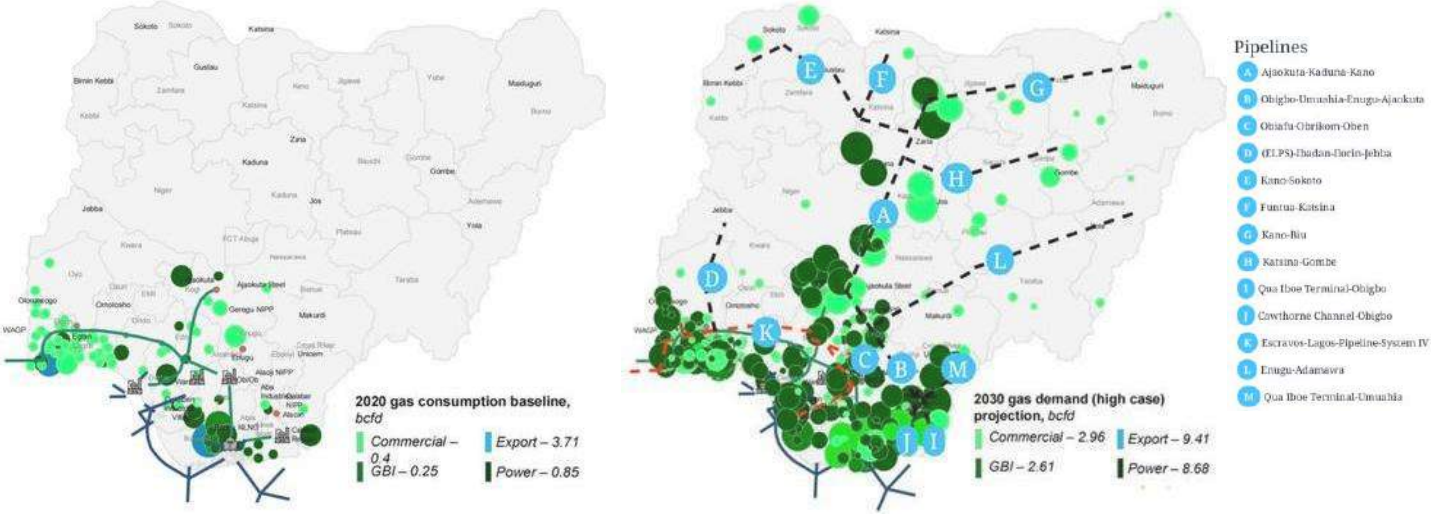
The Domestic Gas Delivery Obligations (DGDO) performance have also improved, from ~50% five years ago to ~70% in 2024. Looking forward, gas demand is set to exceed gas supply in all scenarios by 2030, indicating an urgent need to incentivise gas development and supply whilst prioritising high economic impact demand.

Domestic demand is expected to continue to be driven by power, GBI and commercial sectors.

Export demand will continue to be driven by LNG which accounts for ~70% of export demand (NLNG historically accounted for over 95% of these volumes).

On gas transportation network, Nigeria boasts of over 2,500KM of pipelines, with plans to expand through major projects like the Ajaokuta-Kaduna-Kano (AKK) and OB3 pipelines among others, which will enhance gas distribution across the country. Current gas pipeline infrastructure in development plans could require up to $22 billion investment. (Exhibit 3).

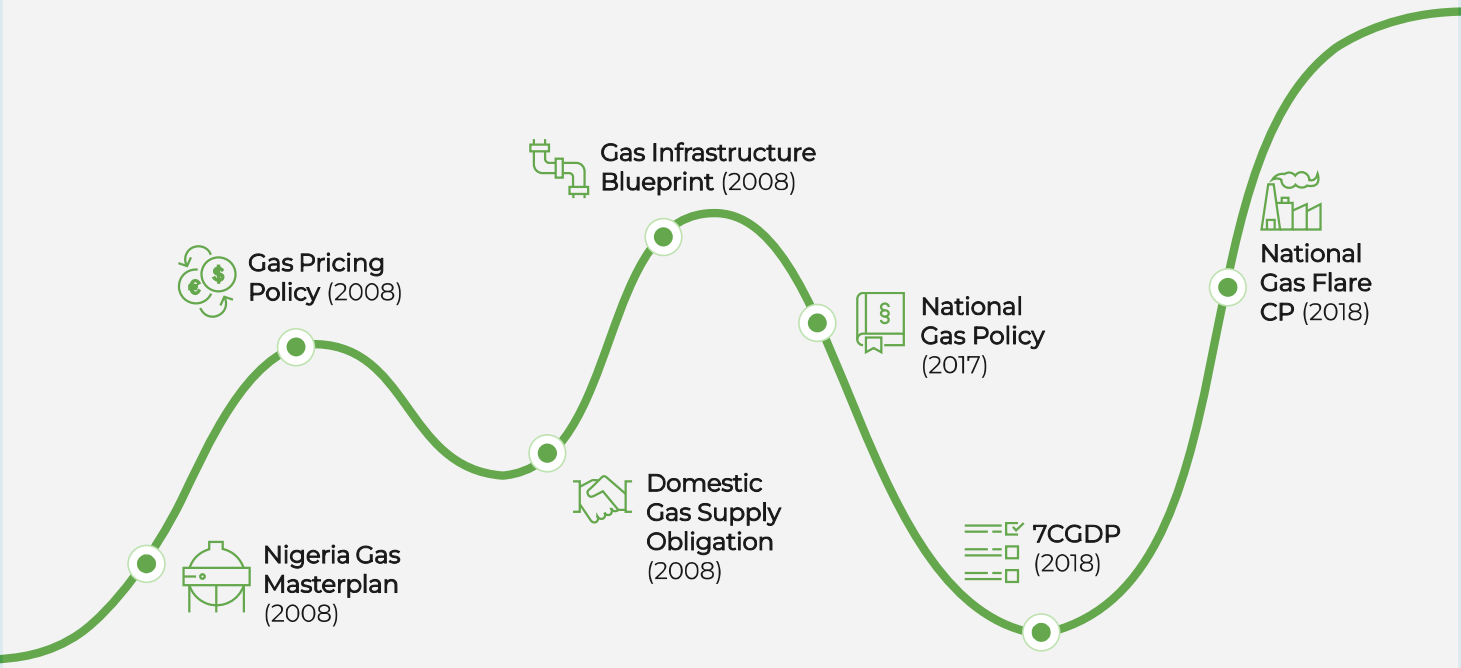
Exhibit 3: Gas Consumption Baseline Vs Gas Demand Projection



Source: Decade of Gas website

Nigeria has had a range of ambitious natural gas development plans and policies over the last two decades. Despite these programmes and policies, there is still a need for focused interventions to drive more impact. Intensified investments are needed to stimulate gas supply growth, particularly for non-associated gas and deepwater gas developments. The viability of on-grid power value chain also has to be strengthened to meet power demand. Also, to continue to attract more investment, infrastructure developments must be made more attractive to financiers with incentives and clear visibility over likely returns.

Exhibit 4: Nigeria Has Had Various Ambitious Natural Gas Development Plans and Policies Over The Years



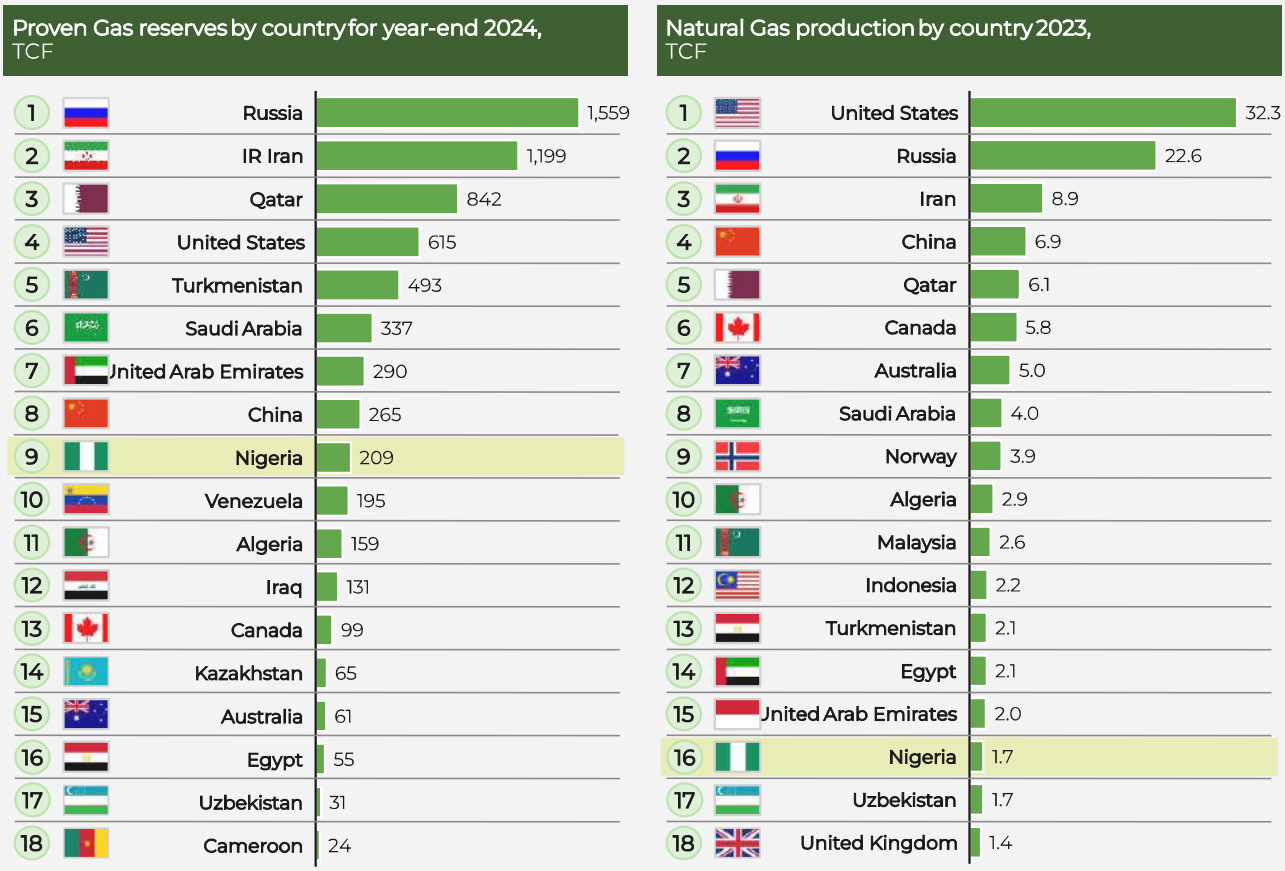
More recently, the Nigerian gas landscape has been evolving, driven by key actors and decisions designed to improve its attractiveness (Exhibit 4):

- **Upstream fiscal and commercial executive orders** on gas tax credits and allowances for non-associated gas (NAG) developments
  - Recent Final Investment Decisions on advancing projects like Iseni, Ubeta and HI.
- **Midstream fiscal and commercial executive orders** on gas utilisation investment allowance for qualifying Plant, Property, and Equipment (PPE)
  - Increased transparency in infrastructure development through the Decade of Gas initiative and the launch of the Midstream and Downstream Gas Infrastructure Fund (MDGIF').
  - Improvements in ease of doing business in upstream contracting thresholds, reduced cycle to reduce costs, and implementation of Executive Order on local content requirements.
- **Improvements in the gas-to-power value chain**:
  - Presidential approval to resolve legacy debt owed by power generation companies to gas producers, via royalty deductions.
  - Electricity Act 2023 decentralizing power generation, transmission, and distribution.
  - Multi Year Tariff Order (MYTO') 2024 revising tariffs to enhance discovery.
- **Recent reforms in Nigeria under the Petroleum Industry Act** (PIA), and new partnerships with established players, signalling a shift toward prioritising gas development.
- **The Presidential Mandate** of achieving 10 billion cubic feet per day (bcf/d) of gas supply by 2027 and 12 bcf/d by 2030.

Gas will also play a key role in Nigeria as an energy transition fuel. Natural gas could contribute to reducing emissions by displacing them from power generation via diesel or petrol and displacing carbon intensive cooking fuels. Such shifts help contribute to Nigeria's Energy Transition Plan (ETP) goal of achieving carbon neutrality by 2060.

Compared to other major global players, Nigeria's gas reserves are still vastly underutilised. Qatar and Saudi Arabia, for example, with the 3rd and 6th largest gas reserves worldwide at 842TCF and 337TCF respectively, and the 5th and 8th largest gas production volumes globally. (Exhibit 5)

Exhibit 5: Nigeria Has The 9th Highest Gas Reserves Globally, But Is 16th By Production



Note: Gas production includes only marketed production

Source: OPEC Statistical Bulletin, 2024

While key challenges exist for Nigeria's gas sector, such as ongoing routine gas flaring, regulated gas pricing (not yet market led), power sector payment / credibility issues, and infrastructure connectivity gaps, they also present key opportunities. These include the chance to:

- Implement a willing seller-willing buyer market-led approach to pricing.
- Expand the infrastructure connectivity.
- Attract investments for deepwater gas development.
- Drive offshore FLNG operations.

- Drive key initiatives like the presidential CNG initiative.
- Increase LPG production.
- Eliminate gas flaring.
- Improve gas monetisation ratio.
- Expand Gas demand (Captive Power, GBIs and high energy industries).

This unique situation offers the chance to unlock domestic economic and industrial value while generating significant export revenues for both investors and the Nigerian government.

With strategic investments and improved cost management, Nigeria could potentially close the gap with global leaders and become a dominant player in the international gas market.

The Next Phase Signals Acceleration of Previous Efforts

The 2008 Gas Master Plan (GMP) pioneered efforts to boost gas development in Nigeria. It focused on institutions, frameworks, and commercial structures to lay the foundation for a broader domestic and export market. It was followed by other policies including the 2017 Natural Gas Policy that aimed to extend these efforts with more direct focus on expanding gas infrastructure and was more specifically built upon through the National Gas Expansion programme in 2020 to further grow Compressed Natural Gas ('CNG') and Liquefied Petroleum Gas ('LPG') as clean alternative sources of domestic energy in Nigeria.

Building on these efforts, the NNPC Gas Master Plan has now been defined. This provides a more ambitious and integrated roadmap designed to unlock Nigeria's vast gas potential, strengthen energy security, and drive industrial growth. The NNPC GMP aims to surpass the goal of 10bcf/d gas supply by 2027 and 12bcf/d by 2030, while leveraging strength of partnerships, and ensuring both domestic and export markets remain reliable and flexible.

CHAPTER 2

Foundation to Future

NGMP 2008 Generated Valuable Successes and Insights

The NGMP 2008 was an intervention framework to shift Nigeria's gas sector from a historically oil-led, flare-heavy, project-by-project model into a structured domestic gas market, while still supporting exports.

The 2007/2008 NGMP focused on five key constraints:

(a) concentrated control of gas resources/infrastructure,

(b) export (LNG) pull vs domestic supply,

(c) third-party access constraints,

(d) transfer pricing issues, and

(e) sub-optimal infrastructure development.

The First Edition of the NGMP document in 2013, summarises the policy interventions and progress, the aim was to transition from a relatively dormant domestic gas market (circa mid-2000s) to a market-based system with willing buyers and willing sellers, supported by time-bound government interventions.

The NGMP 2008 built on three foundational levers:

A. Domestic Gas Supply Obligation (DGSO / DSO)

A mandatory domestic supply/reserves allocation mechanism intended to "force" portfolio re-alignment toward domestic deliveries by making compliance a condition for export (or otherwise penalising non-performance with penalties of $3.50 per thousand cubic feet). The DGSO describes a mandatory reserves allocation for domestic use and explicitly states compliance would be linked to export permissions.

The NGMP further describes the role of IOCs in dedicating specific gas volumes to the domestic market and entering tri-partite arrangements involving the aggregator and buyers to deliver the DGSO.

B. Domestic Gas Pricing Framework (transition pricing → market)

The Domestic Gas Pricing Framework introduced a regulated transitional pricing concept with a sector-based gas pricing policy developed around different approaches for strategic power sectors, strategic gas-based industries, and wholesale/commercial sectors. It aimed to achieve export parity over time, ultimately enabling willing-buyer/willing-seller contracting once sufficient domestic market depth and infrastructure existed. The goal was to balance affordability with commercial viability.

C. Gas Infrastructure Blueprint (backbone transmission + processing)

The Infrastructure blueprint aimed to move Nigeria away from isolated "field-to-plant" connections toward an interconnected backbone system, with phased expansion and processing nodes, to unlock power, industrial demand, and regional integration.

By 2013, the NGMP explicitly framed major backbone expansion as requiring Public Private Partnership (PPP) funding and formalised a national gas transmission tariff concept to support investment.

D. Enabling market design: aggregation, credibility, network rules and standard contracts

A major institutional feature was the Strategic Gas Aggregator role: implemented via the Gas Aggregation Company of Nigeria (GACN) intended to (i) aggregate sector prices, (ii) balance supply across sectors, and (iii) reduce counterparty risk during the transition.

The GACN developed best in class domestic Gas Sale and Purchase Agreements (GSPAs) / Gas Transportation Agreements (GTAs) with appropriate conditions precedent (credit guarantees, take-or-pay, etc.) to improve commercial credibility.

The NGMP facilitated the development of major gas transmission pipelines, including the 130KM OB3, 342KM ELPS II, and 623KM AKK. By 2013, existing facilities comprised over 1,250KM of pipelines with total installed capacity of 2.5bscf/d. These infrastructure projects enabled sustained gas supply of over 2bscf/d to the domestic market.

Successes Attributable To The NGMP

1. Institutional and regulatory progress

A. **Creation/clarification of transitional roles and responsibilities.** By 2013, the NGMP framework had formalised GACN as the transitional strategic aggregator, clarified the role of the Ministry of Petroleum Resources (policy/licensing oversight), and defined buyer/seller obligations under a managed transition.
B. **Codification of transitional pricing logic.** The 2013 NGMP sets out sector-based buyer pricing with an aggregate supplier price designed to trend toward export parity, "DSO-only" application of regulated transition pricing (above-DSO volumes can move toward willing-buyer/willing-seller arrangements)

These are meaningful market-design steps even where downstream execution lagged

2. Infrastructure and supply progress

A. **Defined a credible project list of mid-term supply and infrastructure additions.** The NGMP of 2013 identified specific supply increments and enabled projects from 2013–2015, including processing expansions and new pipeline connections, explicitly pointing to completing the OB3 interconnector to move "stranded" eastern gas to western demand centres.
B. **Recognised and priced transport as a standalone value chain.** The 2013 Plan framed transmission as an investable network with a stated tariff concept and a PPP delivery expectation (a critical precondition for private midstream participation).

3. Gas-to-power as the anchor domestic market

The Plan positioned gas-to-power as the dominant near-term demand driver, explicitly targeting a major increase in generation enabled by gas. By 2013, the NGMP status narrative showed the system had begun responding to power-sector demand growth, even while being constrained by outages and vandalism events illustrating both traction and fragility.

4. Export growth continued alongside domestic market-building

One practical success is that Nigeria's export-oriented gas (LNG) value chain remained active and growing through the period in which domestic reforms were ongoing, which helped to sustain upstream investment appetite.

NNPC GMP Builds Upon Progress Achieved

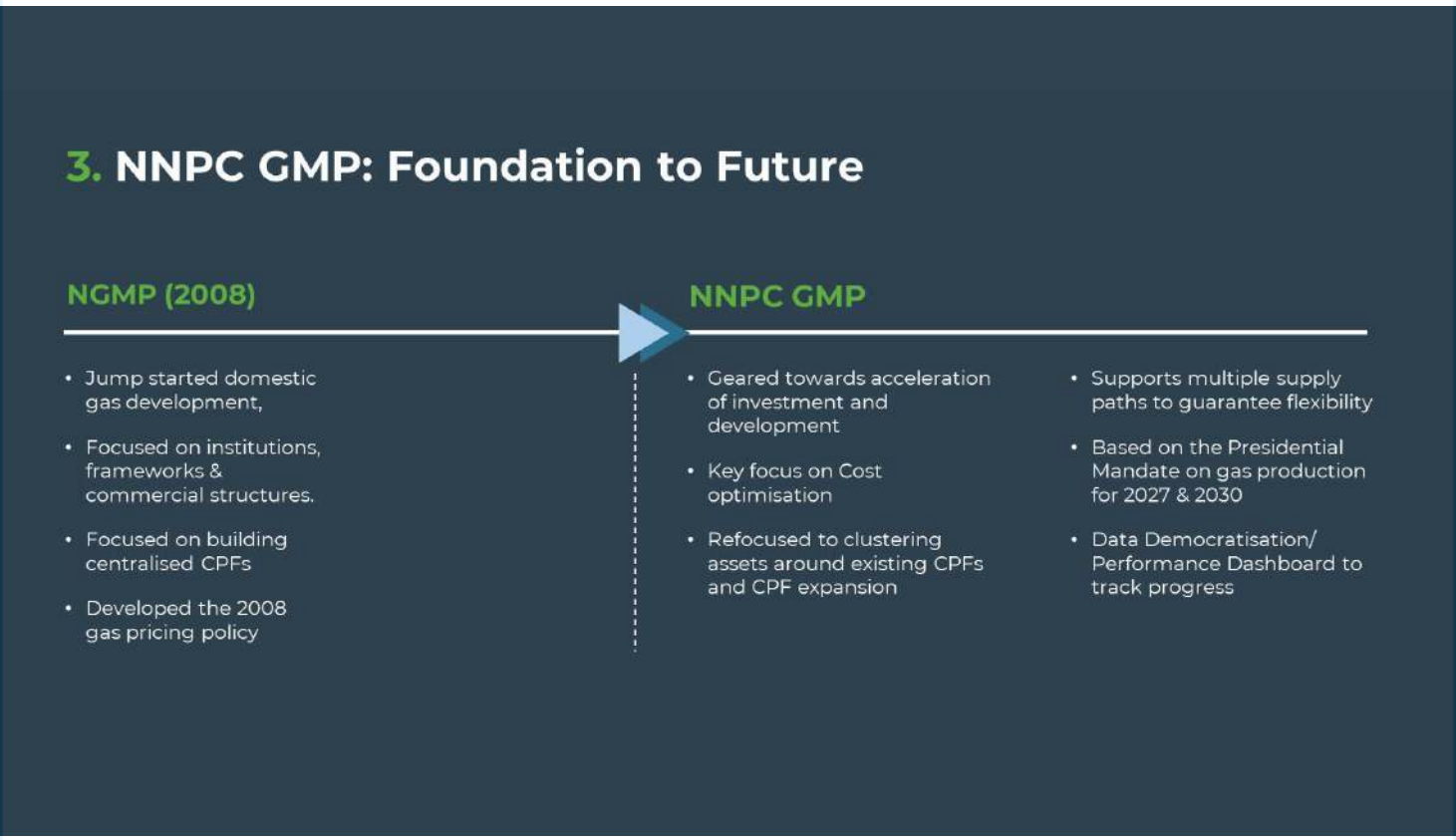
The NNPC GMP shifts from "jump-starting" gas supply towards managing a more market-based, investment-driven and coordinated gas economy.

The Plan which builds on the Presidential Mandate of 10bcf/d in 2027 and 12bcf/d in 2030 as gas production alongside the Federal Government's gas development incentives, is geared towards: unlocking gas resources in a cost-efficient and coordinated manner as well as incentivising and accelerating investment in gas infrastructure. The Plan focuses on clustering assets and priming wider CPF expansion within the clustered assets.

Additionally, it provides balanced consideration for both domestic and export market. It seeks to grow demand, transform Nigeria into a gas driven economy, Gas Based Industries whilst strengthening LNG export revenues.

It builds on previous policy intents, aligning with the PIA which aims to position Natural gas as a transition fuel, strengthens regulation, enable midstream investments, reducing flaring, and promoting domestic utilization

Finally, it deploys a more rigorous digital framework to track progress achieved, using data-driven approaches and dashboards to manage the implementation of initiatives along the entire lifespan of the Plan. The established governance structure provides thorough and disciplined implementation for delivery of its objectives.



CHAPTER 3

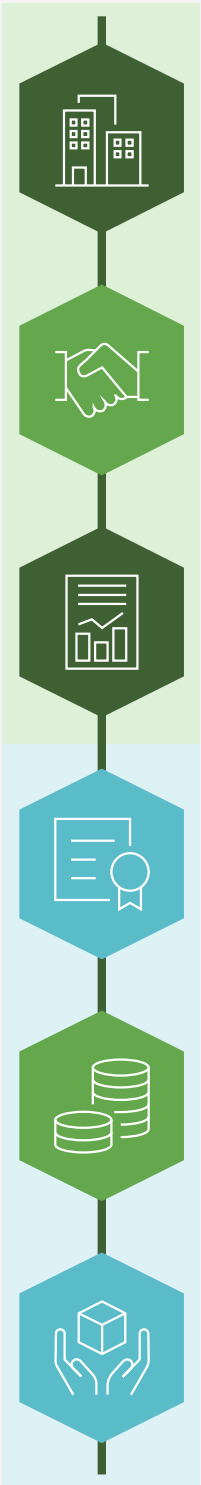
Key Levers and Drivers

Key Levers & Drivers

Nigeria's national energy agenda has been shaped by several initiatives, several of which focus specifically on the gas sector. These levers and drivers directly support the NNPC GMP in complementary ways. (Exhibit 6)

Exhibit 6: NNPC GMP: Levers & Drivers

Levers Drivers



Decade of Gas / GACN	• Provide avenue for policy support / initiative, and advocacy for Government intervention
Partners Alignment	• NNPC & Partners • IPPG / OPTS • Industry Stakeholders
PIA	• Fiscal framework • Gas pricing framework
Presidential Mandate	• 10bcf/d Gas Production in 2027 +12bcf/d Gas production in 2030 • Gas development incentives • Executive Orders
Commerciality	• Improved gas monetisation of produced gas • Grow from 60% to 75% in 2027 and 80% in 2030
Sustainability	• ESG • Regulatory Compliance

Decade of Gas

Launched in 2021 by the Nigerian government, this programme aims to transform Nigeria into a gas-powered economy by 2030 through several key sectors:

- **Gas-to-Power Initiatives**
  - Enhancing the use of natural gas for power generation to ensure reliable and affordable electricity. This includes developing infrastructure for gas-to-power projects and addressing liquidity challenges in the power sector.
- **Industrialisation and Economic Growth**
  - Promoting the use of gas as a catalyst for industrialisation. This involves supporting industries that rely on gas as a feedstock, such as petrochemicals, fertilizers, and methanol production, to drive economic growth and job creation.
- **Infrastructure Development**
  - Building and expanding gas infrastructure, including pipelines, processing plants, and storage facilities. Key projects include the Trans-Nigeria Gas Pipeline (TNGP) and Ajaokuta-Kaduna-Kano (AKK) pipeline, which aims to improve gas deliverability and close infrastructure gaps.
- **Environmental Sustainability**
  - Reducing gas flaring and promoting the use of cleaner energy sources. The programme aims to minimise environmental impact by encouraging the adoption of gas for domestic and industrial use, thereby reducing carbon emissions.
- **Commercial Viability**
  - Establishing a market-driven approach to gas commercialisation. This includes developing a willing buyer-willing seller framework, ensuring fair pricing, and creating an enabling environment for private sector investment in the gas sector.
- **Policy and Regulatory Reforms**
  - Implementing supportive policies and regulatory frameworks to attract investment and ensure the sustainable development of the gas sector. This includes several reforms aimed at improving transparency and efficiency.
- **Capacity Building and Human Capital Development**
  - Investing in human capital to build a skilled workforce for the gas industry. This involves training programmes, educational initiatives, and partnerships with academic institutions to develop the necessary expertise.

The Decade of Gas programme is a comprehensive initiative designed to leverage Nigeria's vast natural gas resources to drive economic development, improve energy security, and promote environmental sustainability.

Gas Aggregation Company of Nigeria (GACN)

The GACN ensures the effective implementation of the Domestic Gas Delivery Obligation (DGDO), which mandates gas producers to allocate a portion of their production to the domestic market, thus supporting industrial growth and energy security. GACN aggregates gas supplies from various producers and allocates them to sectors like power generation, manufacturing and whole sellers, streamlining the supply chain and fostering a more efficient market.

GACN provides best in class contractual framework for gas sales and purchase agreements, reducing disputes and promoting transparency. It actively works to develop and expand the domestic gas market by identifying new opportunities for gas utilisation and supporting gas-based industries. GACN implements a systematic pricing framework of the approved gas price, to ensure fairness and market stability.

Engaging with stakeholders, GACN fosters collaboration and addresses issues that impact the gas sector, ensuring policies align with industry goals. It invests in capacity building and training programmes to enhance the skills of industry professionals, supporting the long-term sustainability and competitiveness of Nigeria's gas sector.

NNPC, IPPG and OPTS

To address Nigeria's gas infrastructure challenges, NNPC Limited, Independent Petroleum Producers Group (IPPG), and Oil Producers Trade Section (OPTS) needs to collaborate on critical projects such as the AKK and OB3 pipelines, while jointly investing in virtual distribution networks to expand access to underserved regions. To meet growing domestic and industrial demand, these industry partners will need to align. Additionally, a unified approach to infrastructure security, including advanced monitoring systems and community engagement, will be essential to mitigate risks from vandalism and sabotage.
Policy and regulatory alignment are equally critical for these stakeholders. They will need to advocate for competitive fiscal terms and deregulated domestic gas pricing to attract investments and ensure project viability. Targeted incentives can further accelerate the adoption of gas-based power plants and compressed natural gas (CNG) as alternatives to diesel and petrol.

The alignment of these stakeholders is expected to significantly boost gas production and domestic utilisation, driving industrial growth, job creation, and energy security, making a crucial contribution to the NNPC GMP.

Petroleum Industry Act (PIA)

The Petroleum Industry Act (PIA) 2021 is Nigeria’s flagship oil and gas reform law, creating a legal, governance, and fiscal framework for the entire petroleum value chain from upstream to downstream. It is designed to improve transparency, attract investment, and give host communities a clearer, statutory stake in the industry.

The PIA’s stated objectives include creating efficient governing institutions, establishing a commercially oriented national oil company, promoting transparency and accountability, fostering a competitive investment climate, and enhancing host community development. The Act is organised into several chapters covering governance and institutions, administration of upstream and midstream/downstream operations, host communities, and a new fiscal and tax regime.

Presidential Mandate

Defined early in 2025, the Presidential Mandate sets clear targets for gas production to achieve 10bcf/d by 2027 and 12bcf/d by 2030.

Commerciality and Sustainability Drivers

The aspiration to increase gas commercialisation from current 60% of gas produced to 75% by 2027 and 80% by 2030, is another critical driver of the NNPC GMP's success. By increasing the proportion of gas that is processed and utilised rather than flared, Nigeria can significantly progress towards its goal of net zero emissions by 2060, as monetising gas supports the development of flexible gas-based power generation to address renewable energy intermittency.

Environmental, Social, and Governance (ESG) regulatory compliance and sustainability requirements will shape infrastructure projects to be environmentally responsible and socially inclusive. Incorporating decarbonisation measures or carbon offset mechanisms into gas infrastructure projects, such as pipelines and processing facilities, enhances their bankability and makes them more attractive to international investment. ESG compliance also ensures that these projects aligns with global sustainability standards, making them more accessible to environmentally conscious investors and stakeholders.

CHAPTER 4

Strategic Focus

Strategic Focus Areas and Target Deliverables

The NNPC GMP is anchored around a clear set of strategic focus areas (Exhibit 7):

- **Improved Gas Monetisation and Market Expansion**

The focus is on supporting the Decade of Gas (DoG) in addressing gas-to-power liquidity challenges and facilitating gas supply to Gas-Based Industries (GBIs) on sustainable terms, ensuring the realisation of critical projects like LNG, FLNG, CNG, LPG, and mini-LNG. Additionally, there is an emphasis on de-risking gas supply for in-country and regional market expansion initiatives.

- **Cost Efficiency and Optimisation**

This area focuses on the Gas Hub Concept to ensure efficient expansion of gas processing plants. It also focuses on cost optimisation in the gas sector through facility sharing and synergies, ensuring that operations are streamlined and cost-effective.

- **Increase of Reserves, Production, and Supply**

The goal here is to guarantee delivery of the Presidential mandate for 2027 and 2030. This includes accelerating the development of Deepwater Gas, minimising gas re-injection and flaring by 2027. There is also a push to advance 3P (possible) gas reserves to 2P (proved plus probable) reserves to provide a more reliable supply.

- **Closure of Gaps in Gas Deliverability and Infrastructure**

This focus area supports strategic national, regional, and intercontinental projects such as the Trans-Nigeria Gas Pipeline (TNGP), Ajaokuta-Kaduna-Kano (AKK) pipeline, amongst others. The aim is to, trigger the acceleration of additional bankable gas infrastructure projects to ensure key gaps are closed, enhance the overall deliverability of gas and industrialise the country.

- **Commerciality**

The emphasis here is on supporting the development of a willing buyer-willing seller commercial approach for gas pricing in the domestic market, ensuring that commercial transactions are market-driven and sustainable over the medium to long term.

These strategic focus areas collectively aim to enhance Nigeria's gas sector by addressing key challenges, optimising costs, increasing production and reserves, closing infrastructure gaps, and fostering a commercially viable market environment.

Exhibit 7: NNPC GMP Strategic Focus Areas

Improved Gas Monetisation/ Market Expansion	• Support DoG in addressing gas to power liquidity challenges • Facilitate gas supply to GBIs on sustainable terms • Ensure realisation of critical LNG, FLNG, CNG, LPG & Mini LNG projects and high energy consuming industries. • Derisk gas supply for in-country and regional market expansion initiatives
Cost Efficiency & Optimisation	• Facilitate Gas Hub Concept and efficient expansion of gas processing plants • Ensure cost optimisation in the gas sector through facility sharing, synergies etc.
Production/ Supply & Reserves Increase	• Enable assured delivery of Presidential mandate for 2027 and 2030 • Enable acceleration of Deepwater Gas Development • Minimise gas re-injection and elimination of gas flaring by 2027 • Advance 3P (possible) gas reserves to 2P (proved plus probable) reserves
Gas Deliverability & Infrastructure Gaps closure	• Support Strategic National, Regional, and Intercontinental projects such as TNGP and AAGP • Trigger the acceleration of additional bankable gas infrastructure to ensure key gaps are closed
Commerciality	• Support development of willing buyer-willing seller commercial approach in the gas sector • Provide enablers for enhancing the gas sector.

These focus areas translate into a slate of 12 target deliverables that form the bedrock of the NNPC GMP. (Exhibit 8)

Exhibit 8: Target Deliverables

1. Assure delivery of 10Bcf/d & 12Bcf/d of gas Production in 2027 & 2030 respectively
2. Advance 3P (possible) gas reserves to 2P (proved plus probable) reserves.
3. Develop clear strategies for cost optimisation in the gas sector
4. Support gas to power, CNG & Mini LNG
5. Minimise gas injection and eliminate gas flaring by 2027
6. Facilitate gas supply to GBIs and high energy consumption industries.
7. Provide enablers to enhance the gas sector.
8. Acceleration of Deepwater Gas Development
9. Provide support in terms of gas supply for AAGP
10. Accelerate the development of required additional gas infrastructure
11. Facilitate Gas Hub Concept and efficient expansion of gas processing plants
12. Support development of willing buyer-willing seller commercial approach in the gas sector

Criteria to Cluster Gas Hubs

A central pillar of NNPC GMP is the establishment of a well-structured gas hub system across Nigeria. Gas hubs allow multiple assets to be developed in a coordinated manner, share critical infrastructure, reduce operational costs, and strengthen the commercial viability of the entire gas value chain.

To ensure each hub is defined effectively, NNPC GMP introduces a set of clear criteria for clustering assets and optimising cost. These criteria are then applied to rank hubs based on their resource base and development potential.

Foundations for Gas Hub Design

Five key criteria have been used to determine how gas assets are grouped into hubs and how each hub boundary is defined. These criteria ensure that hub development is technically sound, commercially viable, and operationally efficient.

1 

Proximity of assets

A fundamental requirement for forming a hub is geographical closeness.

- Assets within a 50-kilometre radius are considered suitable for clustering.
- Proximity reduces pipeline costs, improves operational coordination, and supports integrated development planning.

2 

Terrain

Terrain characteristics influence the complexity and cost of development. Assets are grouped according to their environment:

- Onshore
- Swamp
- Offshore
- Deep offshore

Clustering similar terrain ensures that development strategies and infrastructure solutions are appropriate and cost-effective.

3 

Shared Infrastructure

Shared gas infrastructure is a critical enabler for hub formation.

- This is especially important for the production and commercialisation of gas fields as it helps define hub boundaries for pipelines and processing plants.

4 

Aligned Partnerships

Successful hub development depends on cooperation among Operators.

- Hubs must present opportunities for sharing, synergy, or partnership formation.
- This alignment reduces risk, pools investment, and strengthens operational efficiency.

5

Destination and Off-taker Alignment

Assets within a hub should ideally serve common demand centres.

- Shared destinations and off-takers improve supply reliability and commercial stability.
- This includes LNG facilities, GBIs, Power Plants, and Export Terminals.

These five criteria collectively ensure that gas hubs are designed to minimise cost, enhance flexibility, and maximise the overall value of Nigeria's gas system. (Exhibit 9)

Exhibit 9: Gas Hubs: Criteria for Asset Clustering & Cost Optimisation

1	Proximity	Assets within a 50km radius
2	Terrain	Onshore, Offshore, Swamp, Deep Offshore
3	Shared Infrastructure	Shared gas Infrastructure for production and commercialisation of mainly gas fields is critical to defining hub boundaries e.g pipeline and processing plants
4	Aligned Partnership	Opportunities for sharing, synergizing or forming partnerships
5	Gas Destination / Off-taker	Common destination and Off-taker

Gas Hub Ranking by 2P Reserves

After defining hub boundaries, a ranking exercise was conducted to evaluate each hub's development potential based on 2P (Proved + Probable) reserves and performance across the five clustering criteria. This ranking provides a clear view of the hubs which should be prioritised for investment and development.

The hubs were ranked firstly by their 2P resource base, which is the strongest indicator of long-term commercial potential. Beyond resource size, each hub was also assessed against the five clustering criteria above to understand both technical feasibility and system readiness. The resulting scores reflect the degree of alignment with these criteria, ranging from strong (green) to partial (yellow) and weak (red), providing a clear view of each hub's development strengths and constraints. (Exhibit 10)

Exhibit 10: Hubs are Ranked by 2P Reserves

Hubs are ranked by 2P resourcebase

Gbaran_Soku_Obagi_OBOB & Anyala_Funiwa_Ofrima_Madu Hub are carried as "super HUBs"

Yes Somewhat No

S/N	Major Gas Hubs (Reference)	Hubs 2P Resource Base	Proximity - 50km (1)	Terrain (1)	Shared Infrastructure (3)	Aligned partnership (3)	Market (2)	Total Score
1	GBARAN_SOKU_OBAGI_OBOB	40	1	1	3	1.5	2	8.5
2	UTOROGU_UGHELLI_OKPOKUNOU_ISENI_BRASS	22	1	1	1.5	3	1	7.5
3	ESCRAVOS HUB	17	1	1	3	3	2	10
4	CAWTHORNE - CHANNEL_NEMBE_AWOBA_BELEMA	10	1	1	3	0	2	7
5	OSO_BRT_NLNG	10	1	1	3	3	2	10
6	OBIGBO_OKOLOMA_BODO_IMO RIVER	9	1	1	3	1.5	2	8.5
7	OTUMARA_FORCADOS	9	1	1	3	3	2	10
8	ANYALA_FUNIWA_OFRIMA_MADU	9	0.5	1	0	3	2	6.5
9	ASSA NORTH	8	0	1	3	1.5	2	7.5
10	ZABAZABA_AGBAMI_NNWA-DORO	7	1	1	0	1.5	2	5.5
11	SAPELE OBEN_(ODIDI)	7	0	1	1.5	0	1	3.5
12	IMA Tubu_BONNY	6	0.5	1	0	1.5	2	5
13	AMENAM-KPONO	5	0.5	1	1.5	1.5	2	6.5
14	EAP_QIT_UQUO_QUAIBO_UTAPATE_ HUB	5	1	1	3	3	2	10
15	H-BLOCK	4	0.5	1	0	1.5	2	5
16	ERHA_BOSI	3	1	1	0	3	0	5
17	AMESHI_ANIEZE_OKWIBOME_IZOMBE_(OML 26)	3	1	1	3	3	2	10
18	BONGA	2	0.5	1	1.5	3	2	8
19	OVADE_OZIENGBE_OGHAREKI_EFE	2	0.5	1	3	3	2	9.5
20	YOHO	2	1	1	3	3	2	10
21	AKPO_EGINA	1	1	1	3	3	2	10
22	USAN	1	1	1	0	3	2	7
23	NSIKO_UGE	0.9	0.5	1	0	3	2	6.5

Summary of Ranking

Based on the ranking, Gbaran_Soku_Obagi_OBOB stands out as the highest-ranked hub, anchored by a substantial 2P reserve base of 40 trillion cubic feet (TCF) and strong performance across proximity, terrain, shared infrastructure, and market access. It has also been classified as a "**super hub**." Several others, including the Escravos, Oso, Obigbo_Okoloma_Bodo, and Otumara_Forcados_Tunu hubs, also perform strongly, combining solid resource bases with favourable infrastructure conditions.

In contrast, hubs such as Zabazaba_Agbami_Nnwa_Doro and Sapele_Oben exhibit weaker alignment in areas like partnerships or shared infrastructure, signalling higher constraints to development. Utapate Hub offers a different kind of advantage: while its 2P reserves are moderate, it benefits from a dedicated supply arrangement with Stanch Fertilizer, which underscores its strategic market linkage.

Smaller hubs, including Yoho, Akpo_Egina, USAN, and Nsiko_Uge, have more limited resource bases, each presenting its own distinct niche, system-linked opportunities when integrated with larger hubs.

This ranking exercise, thus, provides a data-driven foundation for prioritising investments and sequencing gas development across Nigeria. It highlights:

- Where infrastructure expansion will unlock the greatest value.
- Where partnerships and alignment need strengthening.
- Which hubs should drive near-term gas supply growth.
- How to optimise long-term system planning and capital deployment.

By ranking hubs through both geological potential and system readiness, NNPC GMP ensures that Nigeria focuses on the most strategic areas first, while also identifying hubs that require targeted interventions.

Overview of Nigeria's Gas Asset Base and Hub Potential

Nigeria's gas endowment is both vast and diverse, spanning multiple terrains and distributed across various areas that can be developed as integrated hubs. Within the framework of this NNPC GMP, Nigeria's gas resource base has been examined through five analytical lenses:

1. An assessment of 2P and 3P reserve distribution across hubs

2. A review of committed versus non-committed reserves to understand supply availability

3. Geographic clustering of assets to determine natural hub formations

4. Evaluation of infrastructure readiness, particularly CPFs as a key development enabler, and

5. Hub topology by terrain, which informs sequencing and engineering requirements

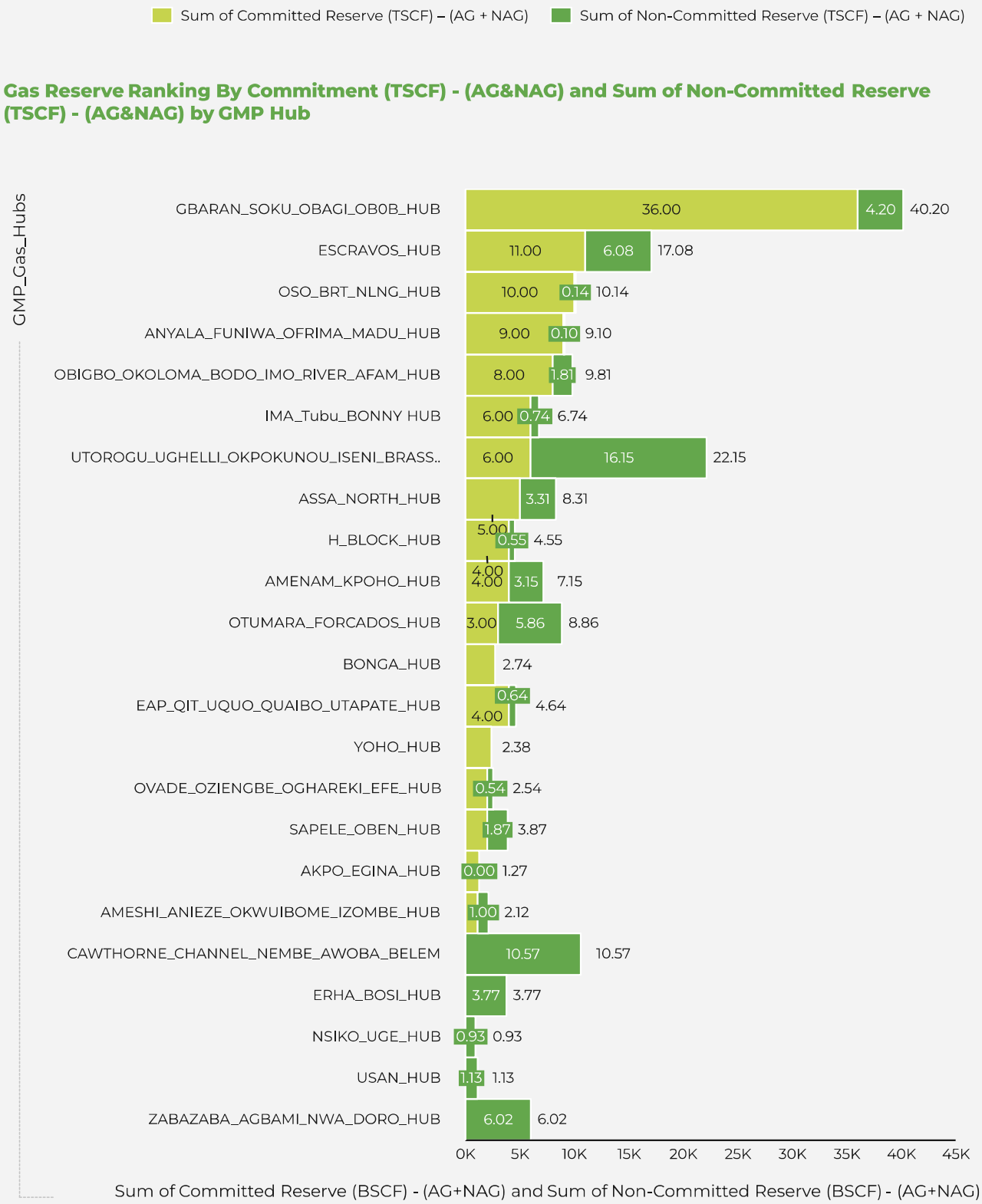
Together, these elements provide a comprehensive view of Nigeria's gas asset landscape and the logic behind prioritising specific hubs for development.

2P and 3P Reserve Distribution Across Hubs

Committed vs Non-Committed Reserves

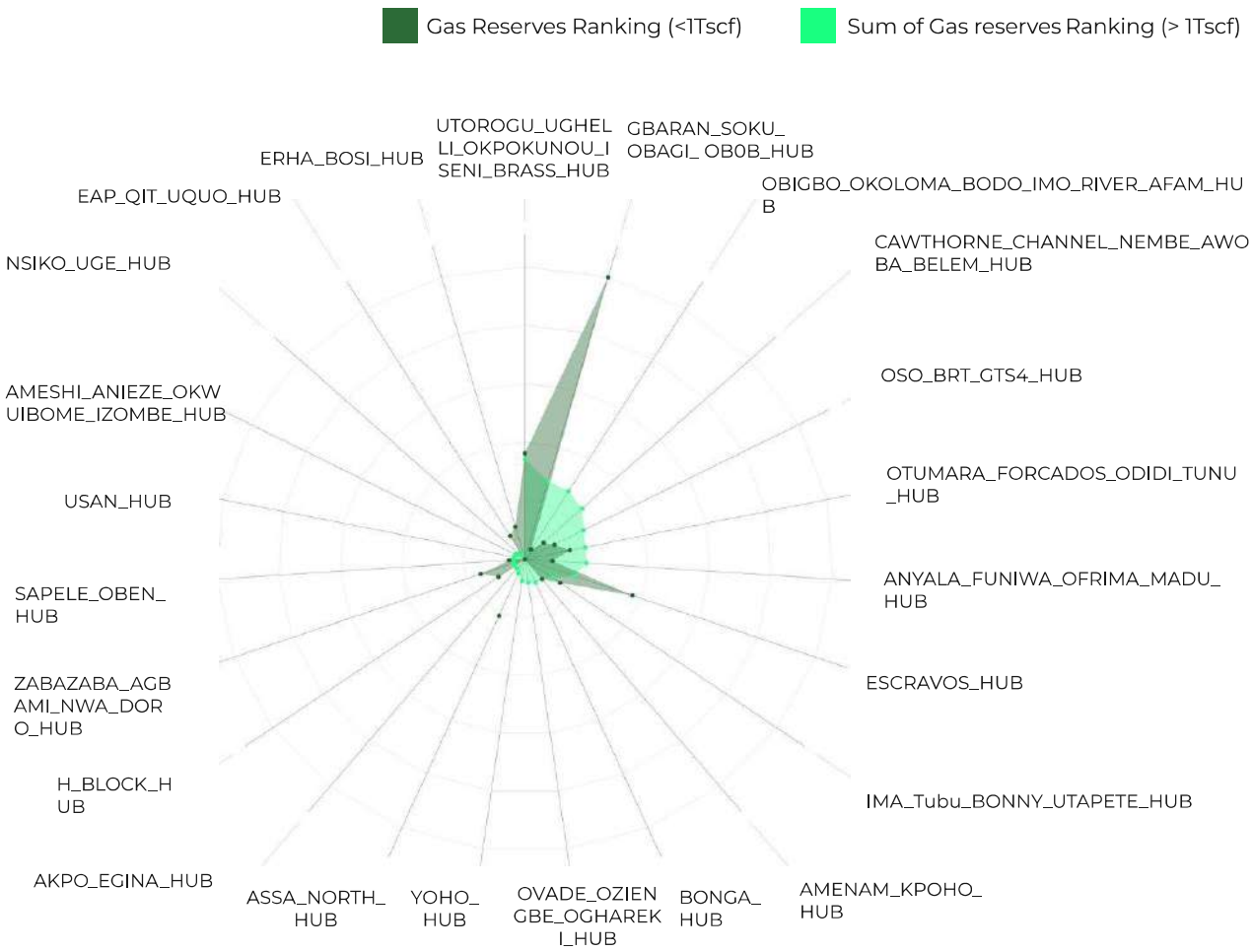
The reserve inventory differentiates between committed and non-committed volumes, showing that a substantial portion of the national gas base remains available for new developments. Hubs such as Gbaran_Soku_Obagi_OBOB and Escravos have a balanced mix of committed and non-committed reserves, whereas others, including Utorogu_Ughelli–Okpokunou_Iseni and Oso, hold large volumes yet to be tied to specific off-takers or supply arrangements. They provide flexibility for future allocation under NNPC GMP (Exhibit 11). Most notably however, is the huge volume of about 10TCF uncommitted volume around the Cawthorne Channel_Nembe_Awoba_Belema cluster.

Exhibit 11: Key Gas Assets Across Hubs: Committed Vs Non-committed 2P Reserves



Note: Reserve numbers are based on NNS Figures

Gas Reserves Ranking (<1Tscf) and Sum of Gas reserves Ranking (> 1Tscf) by GMP Gas Hubs



Note: Reserve numbers quoted are technical reserves

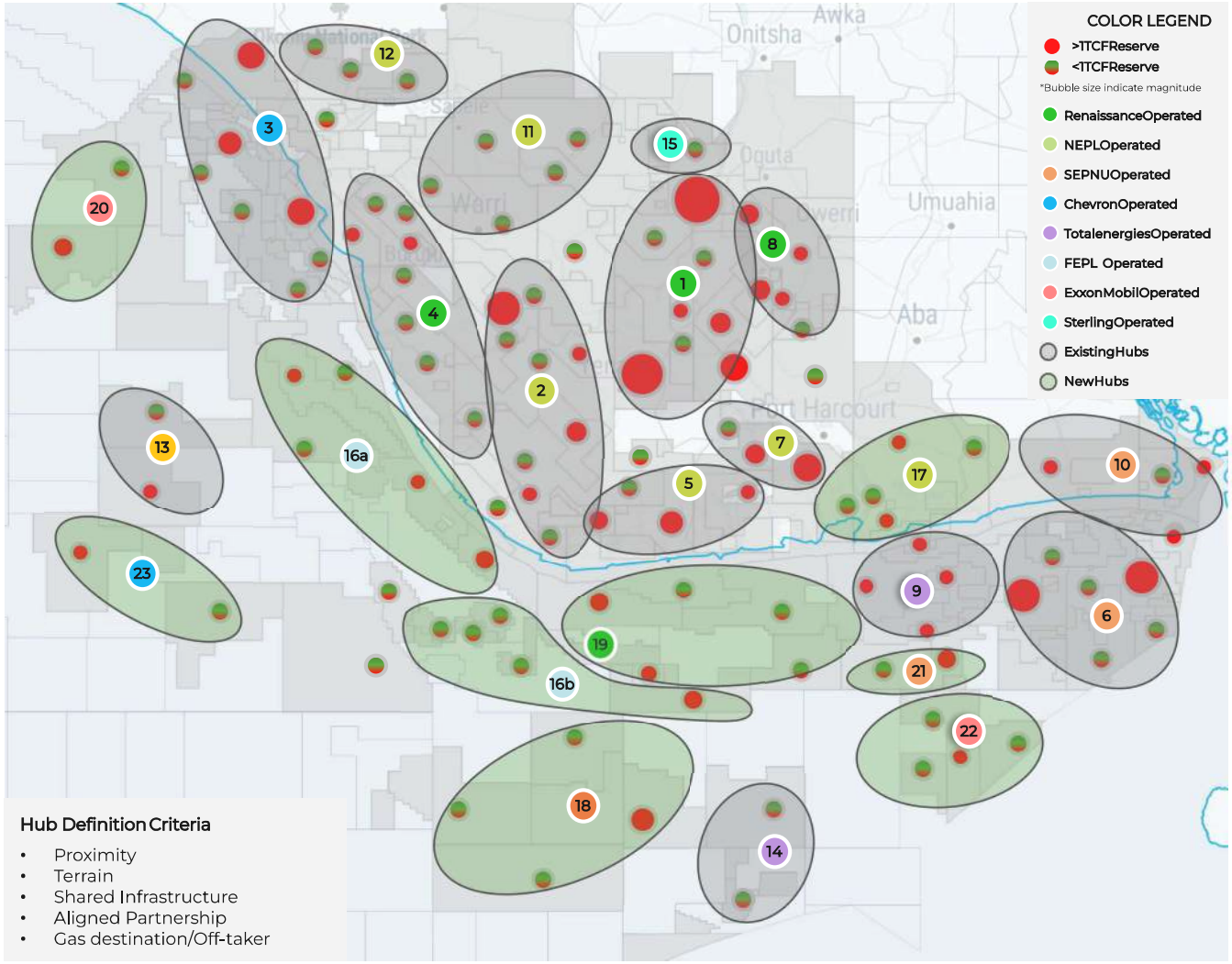
Overall, the mix of committed and non-committed reserves offers NNPC significant flexibility in shaping future supply strategies.

Having established what gas is available, the next step is to examine where these resources are physically concentrated and how they naturally cluster into potential hub formations.

Geographic Spread and Potential Hub Architecture

A spatial map of gas assets highlights natural clustering across the Niger Delta and offshore regions. These clusters form the basis for potential gas hubs, shaped around criteria such as proximity of fields, terrain, shared or expandable infrastructure, partnership alignment, and market access. Large green zones on the map indicate where new hub consolidation can take place, while grey highlight groups representing existing clusters around which additional assets can be integrated. (Exhibit 12)

Exhibit 12 : Nigeria's Gas Fields Naturally Cluster Into Distinct Hub, Creating Clear Anchor Points for Integrated Gas Development



GAS ASSETS HUB LISTING

1. GBARAN_SOKU_OBAGI_OBOB HUB – **40TCF**
2. UTOROGU_UGHELLI_OKPOKUNOU_ISENI_BRASS HUB - **22TCF**
3. ESCRAVOS HUB - **17TCF**
4. OTUMARA_FORCADOS_TUNU HUB - **9TCF**
5. CAWTHORNE CHANNEL_NEMBE_AWOBA_BELEMA - **10TCF**
6. OSO_BRT_GTS4 - **10TCF**
7. OBIGBO_OKOLOMA_BODO_IMO RIVER_AFAM - **9TCF**
8. ASSA NORTH HUB - **8TCF**
9. AMENAM_KPOHO - **5TCF**
10. EAP_QIT_UQUO_QUA IBO_(UTAPATE) HUB - **5TCF**
11. SAPELE_OBEN_(ODIDI) HUB - **7TCF**
12. OVADE_OZIENGBE_OGHAREKI_EFE - **2TCF**
13. BONGA HUB - **2TCF**
14. AKPO_EGINA HUB - **1TCF**
15. AMESHI_ANIEZE_OKWUIBOME_IZOMBE_(OML 26) HUB – **3TCF**

16a. ANYALA__FUNIWA_OFRIMA_MADU HUB - **7TCF**
16b. ANTAN_UDELE HUB - **2TCF**
17. IMA_Tubu_BONNY HUB - **6TCF**
18. ZABAZABA_AGBAMI_NWA DORO HUB - **7TCF**
19. H-BLOCK HUB - **4TCF**
20. ERHA_BOSI HUB - **3TCF**
21. YOHO_HUB - **2TCF**
22. USAN HUB - **1TCF**
23. NSIKO_UGE HUB - **0.9TCF**

Transfer points between Export and Domestic Markets
- Hub 1
- Hub 4
- Hub 8
- Hub 10

Together, these clusters provide a clear blueprint for where Nigeria can prioritise hub development to maximise resource integration. Once hub clusters are identified, the next determinant of readiness is the availability and capacity of CPFs, which ultimately govern how much gas can flow into the system.

Infrastructure Requirements: CPF Expansions and New CPFs

A critical enabler of hub development is the **capacity of existing CPFs**. The analysis shows that hubs requiring CPF expansion account for approximately 60 percent of quoted 2P reserves, demonstrating that processing capacity is a major bottleneck and a key investment priority. (Exhibit 13, 14)

- **Gbaran_Soku_Obagi_OBOB** with about 40.2TCF reserves and with total processing capacity of 5.2bcf/d from 4 gas plants (Gbaran GP-1,400mmscf/d, Soku GP-1000mmscf/d, Obite GP-550mmscf/d and OB-OB GP-2300mmscf/d). However, only about 67% of capacity is being used. This is driven mainly by significant underutilisation of the OBOB processing plant which has a 2.3bcf/d capacity but merely does about 400mmscf/d. The proposed 1100mmscf/d expansion in the hub could be utilised by Gbaran Gas Plant- this could be an avenue for additional gas supply to the domestic market while issues around OBOB GP underutilisation/revamp is being resolved.

- **Utorogu_Ughelli_Okpokunou_Iseni_Brass hub** with 22.1TCF reserve and total of about 600mmscf/d processing capacity from Utorogu & Ughelli Gas Plants with utilisation at 40%. Proposed expansion is on Utorogu GP to accommodate additional 500mmscf/d production, and a new 500mmscf/d Brass GP to increase the total processing capacity around the hub to about 1.7bcf/d. Utorogu NAG-3 GP if completed can add additional 200mmscf/d processing capacity.

- **Escravos Hub** holds the 3rd largest reserves with about 17TCF. Current processing capacity EGP stands at about 680mmscf/d. The proposed expansion is for additional 500mmscf/d to bring total processing capacity to around 1180mmscf/d. Additional supply will benefit the Domestic market. This expansion and subsequent increased production is heavily dependent on completion of NGIC's EOP (Escravos_Odidi pipeline – 20% completed) & OWEP (Odidi_warri Pipeline – 70% completed) which are currently under construction.

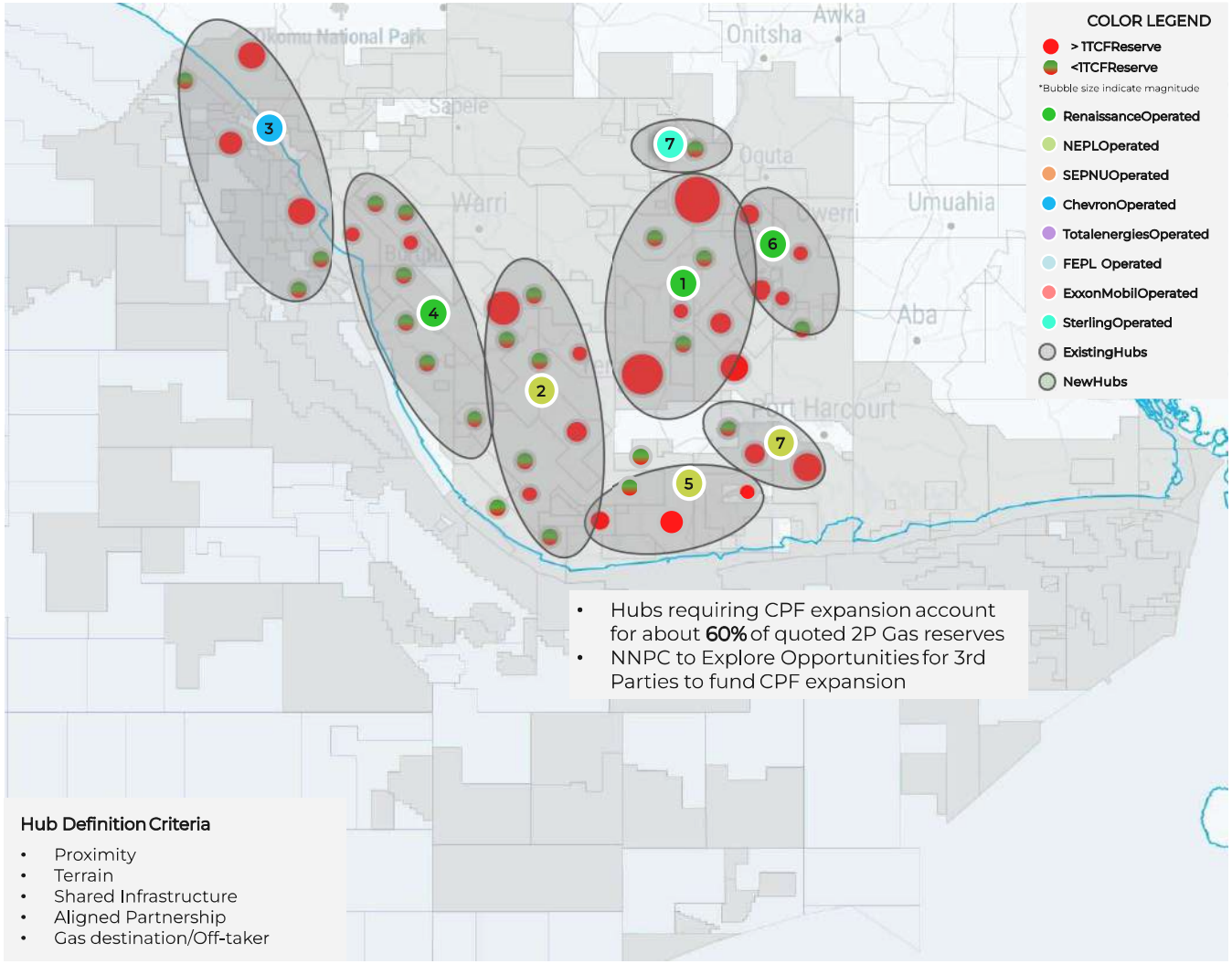
- **Otumara_Forcados_Tunu hub** with about 8.8TCF reserve currently has a processing capacity of about 310mmscf/d from 5 gas plants/AGGs (Associated Gas Gathering) (Otumara-30mmscf/d, FYIP-40mmscf/d, Tunu-160mmscf/d, Odidi-1-40mmscf/d, Odidi-2-40mmscf/d). Current utilisation stands at around 52%. The proposal for this hub is to improve utilisation of the available GPs including a proposal for a new 400mmscf/d CPF to process additional volumes for the export market.

- **Cawthorne_Channel_Nembe_Awoba_Belema** holds about 10.5TCF of gas reserves with a total processing capacity of 150mmscf/d from processing plants – Cawthorne Channel Gas Plant (CCGP – 150mmscf/d). Current utilisation is 0% which presents an opportunity for improving utilisation. Proposed expansion is to add additional 250mmscf/d processing capacity that can supply additional volumes to NLNG for export.

- **Assa North Hub has** about 8.3TCF of 2p reserves. Installed processing capacity in this corridor stands at around 550mmscf/d from 2 gas plants, ANOH-250mmscf/d and AGPC-300mmscf/d with utilisation at 9%. The CPF expansion plan is to expand the processing capacity on AGPC by about 600mmscf/d in tranches of 300mmscf/d. These additional volumes will supply both the domestic and export markets.

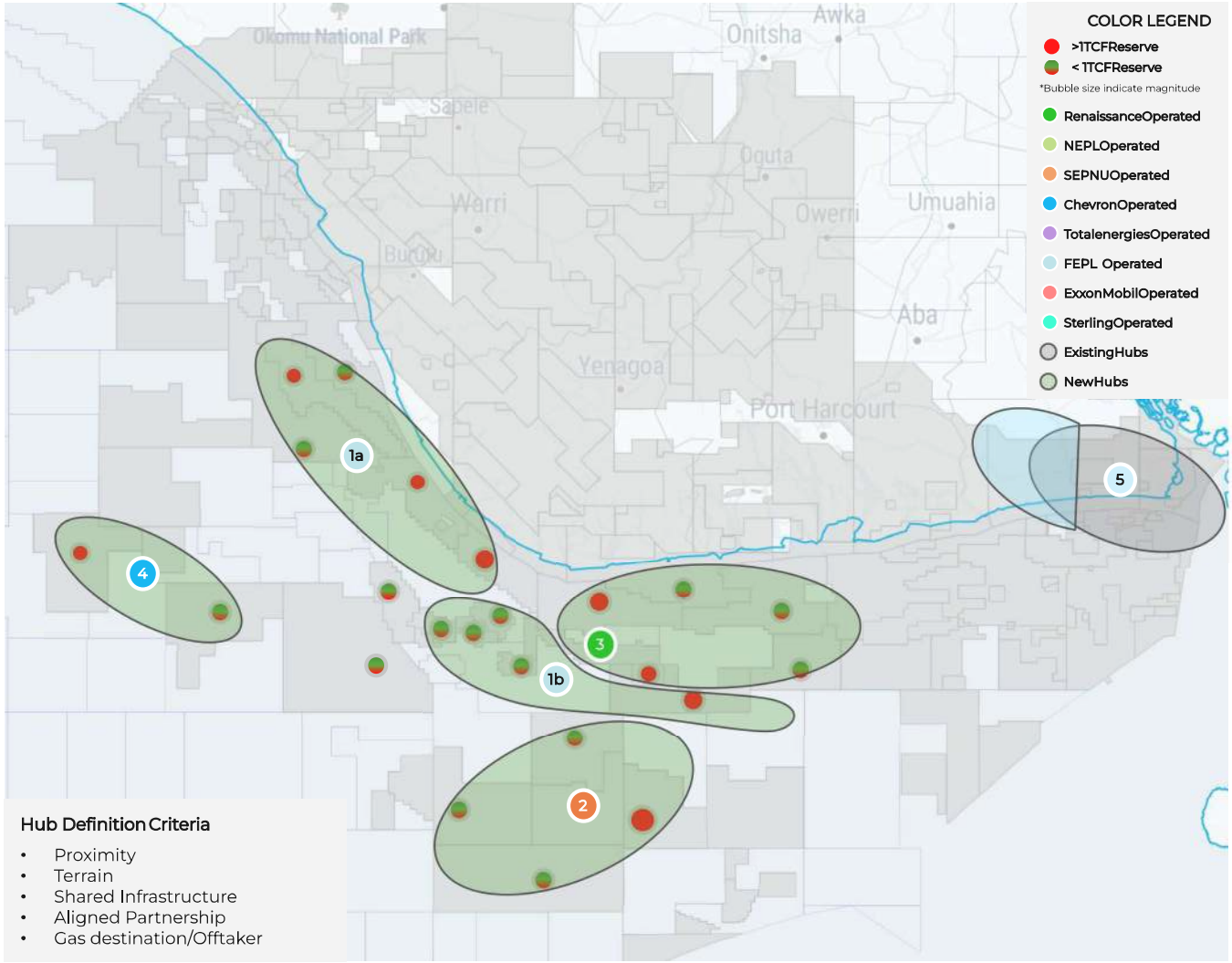
- **Ameshi_Anieze_Okwibome_Izombe_OML 26 hub** has a total 2P reserve of about 3TCF. The hub currently has 2 gas plants GPP1 – 150mmscf/d and GGP2 - 250mmscf/d each cumulatively processing about 400mmscf/d of gas. The utilisation is at about 100%. Proposed expansion is additional capacity of about 200mmsc/f to handle additional volumes coming from satellite fields.

Exhibit 13: Targeted CPF Expansion is Essential to Unlock The Majority of Nigeria's Gas Potential and Enable Hub Development at Scale



1. GBARAN_SOKU_OBAGI_OBOB HUB – 40TCF
   - CPF Capacity (4) : 5,250 mmscf/d
   - CPF Utilisation: 67%
   - Proposed expansion: +1,100 mmscf/d
2. UTOROGU_UGHELLI_OKPOKUNOU_ISENI_BRASS HUB - 22TCF
   - CPF Capacity (2): 600mmscf/d
   - CPF Utilisation: 40%
   - Proposed expansion (3): +200 +300 +500mmscf/d
3. ESCRAVOS HUB - 17TCF
   - CPF Capacity (1): 680 mmscf/d
   - CPF Utilisation: 100% (impacted by EOWEP)
   - Proposed expansion: +500mmscf/d
4. OTUMARA_FORCADOS_TUNU HUB - 9TCF
   - CPF Capacity (5): 310 mmscf/d
   - CPF Utilisation: 52%
   - Proposed expansion: +400mmscf/d – New CPF
5. CAWTHORNE CHANNEL_NEMBE_AWOBA_BELEMA - 10TCF
   - CPF Capacity (1): 150mmscf/d
   - CPF Utilisation: 0%
   - Proposed expansion: +250mmscf/d
6. ASSA NORTH HUB - 8TCF
   - CPF Capacity (2): 550mmscf/d
   - CPF Utilisation: 9%
   - Proposed expansion: +500mmscf/d
7. AMESHI_ANIEZE_OKWUIBOME_IZOMBE_(OML 26) HUB - 3TCF
   - CPF Capacity (2): 400mmscf/d
   - CPF Utilisation: 100%
   - Proposed expansion: 300mmscf/d)

Exhibit 14: Several Priority Hubs Lack Existing Processing Facilities, Requiring Entirely New CPFs to Unlock Their Gas Reserves



1a ANYALA__FUNIWA_OFRIMA_MADU HUB - 7TCF
- Proposed CPF Capacity (1): **500mmscf/d**

1b ANTAN__UDELE HUB - 2TCF
- Proposed CPF Capacity (1): **400mmscf/d**

2 ZABAZABA_AGBAMI_NWA DORO HUB - 7TCF
- Proposed Gas Processing Unit (2): **200 + 400mmscf/d**

3 H-BLOCK HUB - 4TCF
- Proposed CPF Capacity (1): **500mmscf/d**

4 NSIKO_UGE HUB- 1TCF
- Proposed Gas Processing Unit (1): **150mmscf/d**

5 EAP_QIT_UQUO_QUA IBO_(UTAPATE) HUB - 5TCF
- Proposed Gas Processing Unit (3): **300mmscf/d each (GPP-4,5 and 6)**

Overall, expanding CPF capacity is essential to unlocking majority of Nigeria's reserves and will be a defining investment focus for NNPC GMP. With capacity requirements clearly defined, the final lens is understanding how hubs differ technically by terrain—an essential input for sequencing, engineering design, and cost planning.

Taken together, the analysis provides a clear, data-driven foundation for Nigeria's hub-based gas development strategy. The resource base is large and concentrated, significant volumes remain uncommitted and available for allocation, natural geographic clusters create strong hub formations, pipeline and CPF investments, expansions and new builds, will be essential to unlock supply. Combined with terrain-based hub typologies, these insights form the basis for prioritising investments, sequencing development, and designing the infrastructure roadmap required to deliver NNPC GMP.

Integrated Gas Demand and Priority Anchor Projects

Nigeria's gas demand landscape is expanding rapidly, fuelled by growth in Liquefied natural gas (LNG), power generation, compressed natural gas (CNG), industrial parks, and gas-based industries. To support NNPC GMP implementation, an analysis was done to outline current and forecast demand across major sectors, prioritise key demand projects in 2 segments- those with Final Investment Decision (FID) potential within 12 months, and those that present mid-term opportunities, consolidating integrated demand projections through 2030, providing opportunity forecasts, and mapping out year-by-year hub-level supply contributions.

Together, these analyses provide a comprehensive picture of Nigeria's demand trajectory and the supply required.

2025 Gas Demand Profile

The national gas demand profile for October 2025 shows total demand of approximately 13,000mmscf/d, spread across five major segments (Exhibit 15):

- **LNG:** Demand from land-based, floating, and small-scale LNG solutions totals 6,500 mmscf/d, anchored by major projects such as NLNG and OKLNG.
- **Power Sector:** Gas demand for power generation totals 1,000mmscf/d, driven by projects such as GIPP Phase I, OKPAI II, Kano IPP, and Egbin II.
- **CNG:** CNG demand is currently 80mmscf/d, with significant growth expected as CNG expands as a transition fuel for transportation and small industries.
- **Industrial Parks:** Industrial clusters across Ajaokuta, Gwagwalada, Kano, Ibaka, and Suleja are projected to require 1,300mmscf/d.
- **GBIs:** Methanol, fertilizer, petrochemicals, and refineries collectively account for 4,500 mmscf/d, led by large-scale projects such as BUA Chemical City, Dangote T3–T6, and the Gulf of Guinea Methanol project.

Exhibit 15: Gas Demand Outlook (December 2025)

1. LIQUIEFIED NATURAL GAS (LNG)

LAND BASED LNG
- NLNG (T7+)-1263
- OKLNG-1800

WESTFLUX LNG
- VTT LNG
- PreHeat Energies
- (Park LNG) -50

FLOATING LNG
- UTM - 325
- NNPC-Chevron- 400
- GOLAR (Mark II)
- Tansoceanic
- IESL
- Platform

SMALL SCALE LNG
- NTL-Silver Peaks LTD
- Prime LNG Plant-30
- NGML-Gasnexus LNG Plant- 7.5
- NGML-BUA-NEXUS-40
- Assurance LNG Plant
- Highlang LNG-5
- LNG Arete

TOTAL - 6,500 (MMSCF/D)

2. POWER SECTOR

- KADUNA IPP PHASE I (90MW)-22
- GIPP PHASE I (350MW) -110
- GPAL-35
- OKPAI II (480MW)-75
- KANO IPP PHASE I (450MW)-120
- EGBIN II (1,250MW) -160
- PACIFIC POWER PHASE II -
- IKOT ABASI POWER-
- JOLOMI POWER
- SOKOTO POWER

TOTAL – 1,000 (MMSCF/D)

3. COMPRESSED NATURAL GAS (CNG)

- NGML-axella CNG Plant – Illasamaja
- NGML-Axxela CNG Plant - Ijebu Ode
- NGML-Axxela CNG Plant – Uyo
- NGML- Axxela CNG Plant - Ohaji, Imo
- NGML-Axxela CNG Station, Kano, Kano
- NGML-Axxela CNG Station, Abuja
- NGML-Axxela CNG Station, Kaduna
- MBH Power CNG
- GUELPH CNG
- Power Gas Investment
- A4E CNG MS
- Green Fuels CNG
- STARGAZ CNG
- TOTAL SUPPORT CNG
- NRL – Abuja L-CNG
- NRL – Kano L-CNG

TOTAL – 80 (MMSCF/D)

4. INDUSTRIAL PARKS

- GOLDEN BRIDGE PARK-
- KWALE GAS PARK -100
- WALTERSMITH PARK-100
- AJAOKUTA INDUSTRIAL PARK-20
- GWAGWALADA INDUSTRIAL PARK-100
- KANO INDUSTRIAL PARK-200
- IBAKA INDUSTRIAL PARK-200
- SULEJA INDUSTRIAL PARK -25
- OWERRI INDUSTRIAL PARK -10
- EPE/LEKKI INDUSTRIAL PARK-200
- KARU INDUSTRIAL PARK-50
- BADAGRY INDUSTRIAL PARK -100

TOTAL – 1,300 (MMSCF/D)

5. GAS BASED INDUSTRIES (GBI)

- BUA CHEMICAL CITY-200
- BFPCL-340
- BLACKROSE METHANOL-145
- GULF OF GUINEA METHANOL
- INDORAMA T1 & T4-120
- DANGOTE T3,4,5,& 6 -450
- NSIA – OCP -150
- GWAGWALADA FERTILIZER -UIP
- TABOR METHANOL- 150
- KANO FERTILIZER-UIP
- LEKKI FERTILIZER-UIP
- BUA REFINERY - 70
- African Atlantic Gas Pipeline (AAGP) Phase I (Expansion to Abidjan) (3000MMSCF/D) Phase II
- Trans-Shara Pipeline-TBD

TOTAL – 4,500 (MMSCF/D)

TOTAL DEMAND: 13,000 MMSCF/D

*CNG demand expected to grow to 1,000mmscf/d

With the full demand landscape established, the next step is to identify the highest-priority projects that can attain FID soonest and materially impact the near-term gas market. (Exhibit (16a, 16b, 17)

Exhibit 16a: Demand Cluster Map

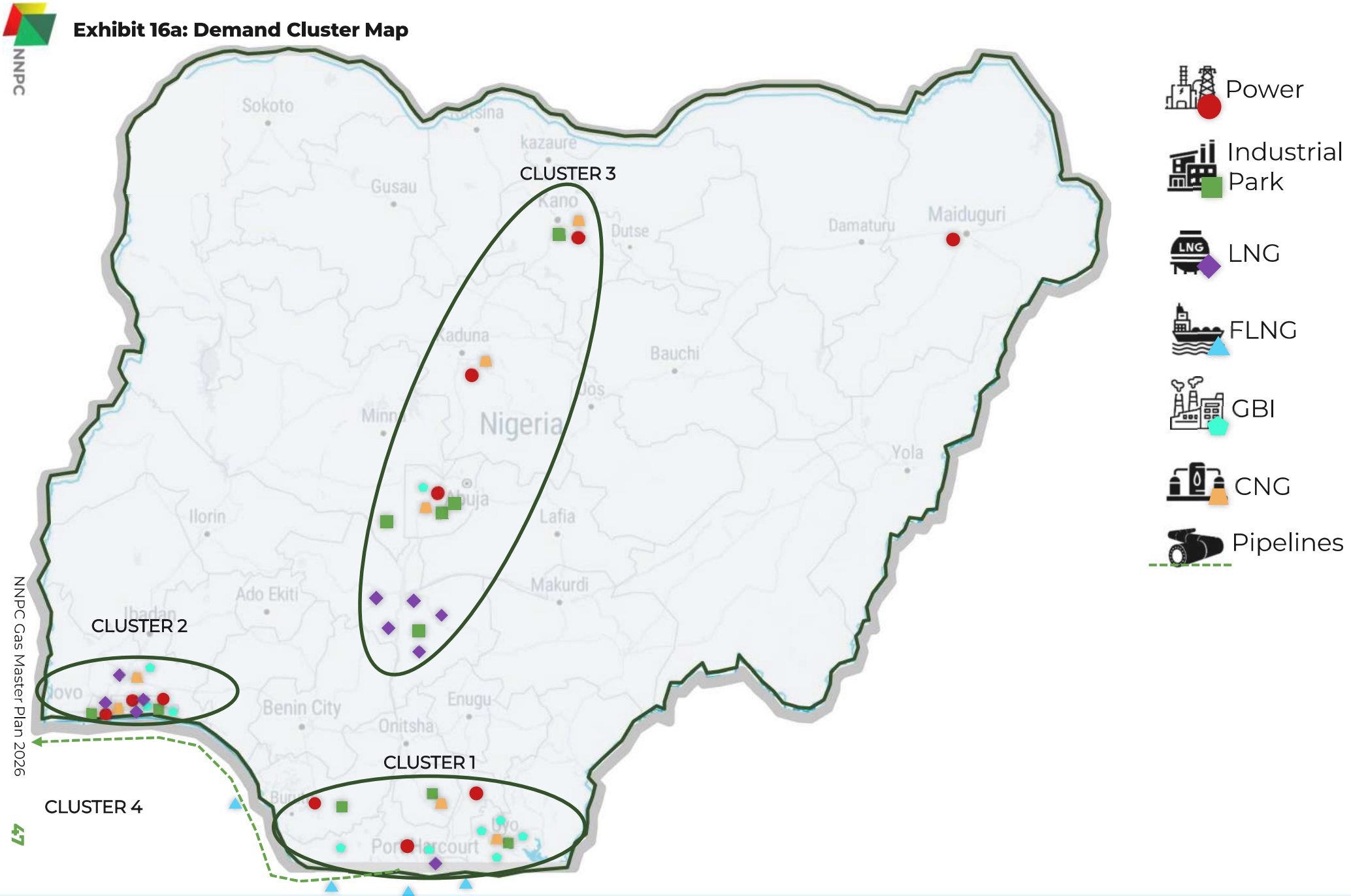


Exhibit 16b: Gas Demand Clustering

SECTOR	CLUSTER 1	CLUSTER 2	CLUSTER 3	CLUSTER 4
PIPELINE				AAGP
				3,000
LNG	NLNL T7 NLNG T8/T9	OKLNG Bridgeport LNG Lekki MBH LNG Project - Lekki FTZ - Phase I&II	Prime LNG Plant NGML-Gasnexus LNG Plant NGML-BUA-NEXUS-40 (Assurance LNG Plant) Highlang LNG LNG Arete	UTM NNPC-Chevron GOLAR (Mark II) Tansoceanic IESL Platform
	2,561	1,975	87.5	725
POWER	OKPAI II IKOT ABASI POWER AFAM II: PH-1&2 GPAL	AGURA EGBIN II MBH Power 425MW Alero - Lagos IPP MBH Power - 285MW Ikorodu-Lagos IPP	GIPP PH-1 ABUJA KADUNA IPP PH-1 KADUNA IPP PH-2 KANO IPP PH-1 & 2 MEPP	
	320	350	328.7	
CNG	NGML-Axxela CNG Plant – Uyo NGML- Axxela CNG Plant - Ohaji, Imo GUELPH CNG –Akwa Ibom	MBH Power CNG-Lagos	NGML-Axxela CNG Station, Kano, Kano NGML-Axxela CNG Station, Abuja NGML-Axxela CNG Station, Kaduna NRL – Abuja L-CNG NRL – Kano L-CNG	
	15	5	25	
INDUSTRIAL PARK	KWALE GAS PARK WALTERSMITH PARK IBAKA INDUSTRIAL PARK OWERRI INDUSTRIAL PARK	EPE/LEKKI INDUSTRIAL PARK BADAGRY INDUSTRIAL PARK	AJAOKUTA INDUSTRIAL PARK GWAGWALADA INDUSTRIAL PARK KANO INDUSTRIAL PARK SULEJA INDUSTRIAL PARK KARU INDUSTRIAL PARK	
	410	300	395	
GBI	BFPCL BLACKROSE METHANOL GULF OF GUINEA METHANOL-Eleme INDORAMA T1 & T4 NSIA – OCP BUA REFINERY Stanch Fertilizer	BUA CHEMICAL CITY DANGOTE T3,4,5,& 6 LEKKI FERTILIZER-UIP	GWAGWALADA FERTILIZER -UIP KANO FERTILIZER-UIP	
	925	700	100	
TOTAL (MMSCF/D)	4231	3330	936.2	3,725

The demand and volumes shown are not exhaustive. Additional demand and future demand dynamics will be incorporated in subsequent revisions

Exhibit 17: Summary: Category A and B Gas Demand by Sectors

CATEGORY A –

- Opportunities with a prospect of attaining FID within 12 months
- Gas source is identified/validated and at various levels of discussions

CATEGORY B –

- Opportunities with a prospect of attaining FID the Mid Term (1-2 years)
- Project Promoters seems credible and have passed NNPC's DD

Category A: Gas Demand Projects

Category A projects are those with strong prospects of reaching FID within 12 months, where gas sources have been validated and investors are ready to commit (Exhibit 18). Category A opportunities span LNG, power, industrial uses, CNG, gas-based industries, and pipelines, outlining the most advanced and investment-ready demand anchors for Nigeria's near-term gas growth.

Exhibit 18 : Category A: Gas Demand Projects

S/N	SECTOR	PROJECTS	GAS VOLUMES REQUIRED (MMSCF/D)	ONSTREAM TIME	TOTAL (MMSCF/D)
1	LNG	NLNG T7+	1,350	<3 Years	3,860
2		OKLNG	1,800	>3 Years	
3		UTM	220	<3 Years	
4		NNPC-CHEVRON	400	<3 Years	
5		PRIME LNG	30	<3 Years	
6		NGML – GASNEXUS LNG PLANT	7.5	<3 Years	
7		NGML-BUA-NEXUS	42	<3 Years	
8		VTT LNG	10	<3 Years	
9	POWER	MEPP	8	EXISTING	470
10		KADUNA IPP PHASE I (90MW)	22	>3 Years	
11		ABUJA IPP (SPFA)	100	<3 Years	
12		GIPP PHASE I (350MW)	110	<3 Years	
13		GPAL	35	EXISTING	
14		KANO IPP (450MW)	120	<3 Years	
15		OKPAI II (480MW)	75	<3 Years	
16	INDUSTRIAL PARK	AJAOKUTA CNG/ INDUSTRIAL PK	20	<3 Years	20
17	GBI	NSIA-OCP	150	<3 Years	635
18		BLACKROSE	145	<3 Years	
19		BRASS FERTILIZER(BFPCL)	340	>3 Years	
20		AGURA / EGBIN 1.0 MMTPA FERTILIZER & METHANOL PLANT	80	>3 Years	80
21	CNG	NGML-axella CNG Plant - Illasamaja	5	<3 Years	45
22		NGML-Axxela CNG Plant - Ijebu Ode	5	<3 Years	
23		NGML-Axxela CNG Plant – Uyo	5	<3 Years	
24		NGML- Axxela CNG Plant - Ohaji, Imo	5	<3 Years	
25		NGML-Axxela CNG Station, Kano, Kano	5	<3 Years	
26		NRL – Abuja L-CNG	5	<3 Years	
27		NRL – Kano L-CNG	5	<3 Years	
28		NGML-Axxela CNG Station, Abuja	5	<3 Years	
29		NGML-Axxela CNG Station, Kaduna	5	<3 Years	
30	GAS PIPELINE	African Atlantic Gas Pipeline (AAGP) Phase I (Expansion to Abidjan) (**300MMSCF/D)**	3,500	>3 Years	3,000

Total Priority A Demand = 8,110mmsfcd

Category A
- Opportunities with a prospect of attaining FID within 12 months
- Gas source is identified/validated and at various levels of discussions

- **LNG Demand (3,860mmscf/d):** Key projects include NLNG T7+, OKLNG, NNPC–Chevron LNG, and UTM, all targeted to come onstream under three years.
- **Power Sector (470mmscf/d):** Kaduna IPP, Abuja IPP, GIPP Phase I, and Kano IPP represent major opportunities to expand Nigeria's gas-to-power footprint.
- **Industrial Parks (20mmscf/d):** Ajaokuta CNG and Industrial Park developments fall within this category.
- **GBIs (635mmscf/d):** Methanol and chemical projects such as Blackrose and Brass Methanol drive midstream and downstream integration.
- **CNG (45mmscf/d):** NGML–Axxela facilities across multiple states have near-term readiness and offer quick demand activation.
- **Gas Pipeline (3,000mmscf/d):** The African Atlantic Gas Pipeline (AAGP) expansion represent the largest single demand anchor in Category A.

Total Category A Demand thus stands at 8,110mmscf/d. Beyond near-term opportunities, medium-term demand centres also need to be captured to fully align gas supply planning with Nigeria's economic growth agenda.

Category B: Gas Demand Projects

Category B projects represent mid-term opportunities with potential to reach FID within 1–2 years. These projects broaden the medium-term demand landscape, spanning LNG expansion, growing industrial and manufacturing zones, downstream gas-based industries, and strategic export pipeline opportunities. (Exhibit 19)

- **LNG (2,480mmscf/d):** Projects include Golar Mark II, Transoceanic, ACE, IESL, and LNG Platform solutions.
- **Power (100mmscf/d):** Projects include MBH Power 425MW Alero - Lagos IPP and MBH Power - 285MW Ikorodu-Lagos IPP.
- **GBIs (1,070mmscf/d):** Fertilizer, methanol, and chemical plants across Abuja, Kano, and Kaduna drive industrial expansion.
- **Industrial Parks (200mmscf/d):** Golden Bridge Park and Awka Industrial Park reflect emerging manufacturing clusters.
- **Pipeline Demand (2,000mmscf/d):** The Trans-Sahara Gas Pipeline (TSGP) represents a long-term export-driven opportunity.

Exhibit 19 : Category B Gas Demand Projects

S/N	SECTOR	PROJECTS	GAS VOLUMES REQUIRED (MMSCF/D)	ONSTREAM TIME	TOTAL (MMSCF/D)
1	LNG	GOLAR (MARK II)	500	>3 Years	2,480
2		KORA	400	>3 Years	
3		TRANSOCEANIC	500	>3 Years	
4		ACE	480	>3 Years	
5		IESL	225	>3 Years	
6		PLATFORM	150	>3 Years	
7		PREHEAT ENERGIES PAKLNG	50	>3 Years	
8		Bridgeport LNG Lekki	90	>3 Years	
9		MBH LNG Project - Lekki FTZ - Phase I&II	85	>3 Years	
11	Power	MBH Power 425MW Alero - Lagos IPP	45	>3 Years	100
12		MBH Power - 285MW Ikorodu-Lagos IPP	55	>3 Years	
13	GBI	1.0 MMTPA FERTILIZER & METHANOL PLANT ABUJA - GWAGWALADA	80	>3 Years	1070
14		BUA CHEMICAL CITY	40	>3 Years	
15		1.0 MMTPA FERTILIZER & METHANOL PLANT KANO - TIGA	80	>3 Years	
16		1.0 MTPA FERTILIZER & METHANOL PLANT KADUNA - RIGASA	80	>3 Years	
17		Dangote Fertilizer Limited (DFL)	450	<2 years	
18		INDORAMA T3 & T4	340	<2 years	
19	Industrial park	Golden Bridge Park	100	>3 Years	200
		Awka Industrial Park	100	>3 Years	
	Pipeline	Trans-Sahara Gas Pipeline (TSGP) Project	2000	> 3 Years	2000

CATEGORY B
- Opportunities with a prospect of attaining FID Mid Term (1-2 years)
- Project Promoters seems credible and have passed NNPC's DD

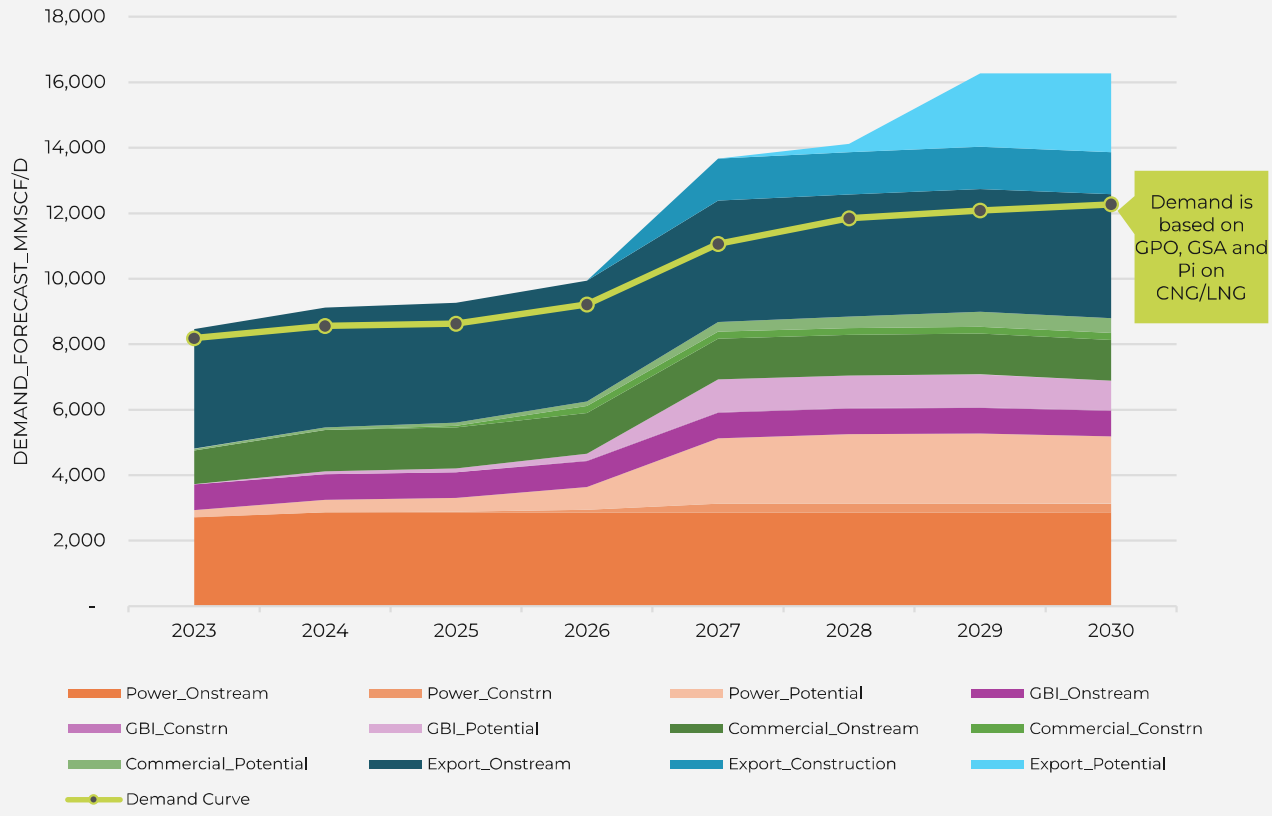
Total Priority B Demand = 5,850mmsfc/d

Total Category B Demand thus stands at 5,850mmscf/d. With demand clearly defined across time horizons, the next step is integrating these into a consolidated national demand forecast to inform supply planning.

Integrated Gas Demand Forecast (2023–2030)

The integrated gas demand forecast aggregates onstream, under-construction, and potential demand across all sectors. (Exhibit 20)

Exhibit 20 : Integrated Gas Demand Forecast (MMSCF/D)



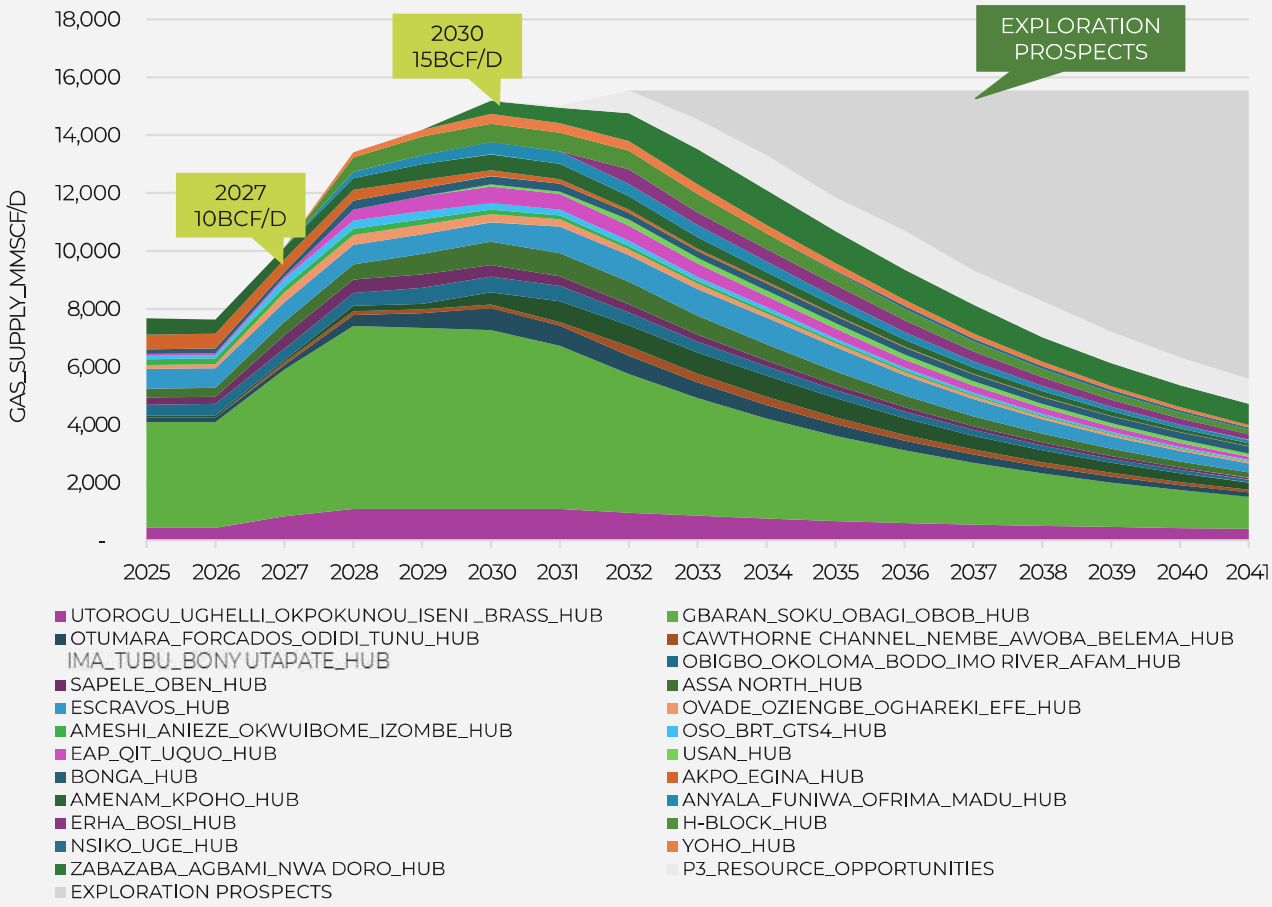
Key insights reveal that demand is projected to rise steadily from about 8,000mmscf/d in 2023 to more than 11,000mmscf/d by 2027, with an accelerated upswing toward 2030 driven by LNG projects, expanding industrial activity, and emerging export pipeline opportunities. Across the curve, one critical insight stands out: unlocking this demand will require addressing payment performance challenges in the power sector, which continues to act as a major bottleneck to sustained growth.

With demand fully mapped, the next analytical step is to examine supply opportunities and assess whether they can meet the rising demand curve.

Integrated Gas Supply Opportunity Forecast (2025–2041)

The integrated supply opportunity forecast evaluates gas availability from all hubs, including exploration prospects. (Exhibit 21)

Exhibit 21 : Integrated Gas Supply Opportunity Forecast



The NNPC GMP outlook shows a strong upward trajectory in Nigeria's supply potential, with production expected to reach 10Bcf/d by 2027, fully aligning with the Presidential Mandate. By 2030, supply could rise further to 15Bcf/d as major hubs such as Gbaran_Soku_Obagi_OBOB, Utorogu_Ughelli, Otumara_Forcados_Tunu, and key offshore clusters come online or ramp up. Beyond this horizon, supply begins to taper without additional resource maturation, underscoring the critical importance of continued exploration and sustained investment to secure long-term output.

To validate this supply–demand balance, the forecast is disaggregated at the hub level to understand contributions from each cluster.

Integrated Hub-Level Gas Supply Forecast

A detailed year-by-year forecast shows the gas supply contributions of all hubs from 2025 to 2041. (Exhibit 22)

Exhibit 22 : Integrated Gas Supply Forecast (MMSCF/D)

*About 2,300mmscf/dadditional production is required to achieve 10bcf/d production in 2027

GMP_HUB	Sum of 2025	Sum of 2026	Sum of 2027	Sum of 2028	Sum of 2029	Sum of 2030	Sum of 2031	Sum of 2032	Sum of 2033	Sum of 2034	Sum of 2035	Sum of 2036	Sum of 2037	Sum of 2038	Sum of 2039	Sum of 2040	Sum of 2041
AKPO_EGINA_HUB	514.5	514	439	386	283	208	153	113	83	61	45	33	25	18	14	10	7
AMENAM_KPOHO_HUB	560	492	419	392	552	544	536	456	388	329	281	238	203	175	148	126	108
AMESHI_ANIEZE_OKWUIBOME_IZOMBE_HUB	200	200	200	212	181	154	131	111	94	80	68	58	49,00	42	36	30	26
ANYALA_FUNIWA_OFRIMA_MADU_HUB	0	0	0	225	300	425	425	425	425	361	307	261	222	189	160	136	116
ASSA NORTH_HUB	300	300	462	512	700	808	808	776	659	560	476	405	344	293	249	211	180
BONGA_HUB	150	150	150	303	280	280	280	238	238	238	238	238	238	238	238	238	238
CAWTHORNE_CHANNEL_NEMBE_AWOBA_BELEMA_HUB	0	0	98	128	128	128	128	321	305	291	247	210	179	152	129	110	93
EAP_QIT_UQUO_HUB	70	70	70	385	510	560	547	536	456	388	329	280	238	202	172	146	124
ERHA_BOSI_HUB	0	0	0	0	0	0	0	510	434	434	434	414	352	299	254	216	184
ESCRAVOS_HUB	680	680	680	680	680	671	918	918	918	918	831	707	601	511	434	369	314
EXPLORATION PROSPECTS	0	0	0.00	0	0	0	0	0	998	2,241	3,706	4,838	6,214	7,280	8,339	9,222	9,963
GBARAN_SOKU_OBAGI_OBOB_HUB	3,654	3,654	5,070	6,322	6,249	6,188	5,637	4,792	4,073	3,462	2,943	2,501	2,126	1,807	1,536	1,306	1,110
H-BLOCK_HUB	0	0	0	488	638	638	638	638	638	542	461	392	333	283	240	204	174
IMA_Tubu_BONNY_UTAPATE_HUB	70	70	70	180	180	420	722	722	722	722	665	565	481	408	347	295	251
NSIKO_UGE HUB	0	0	0	0	0	0	0	0	0	0	48	102	102	102	87	74	63
OBIGBO_OKOLOMA_BODO_IMO RIVER_AFAM_HUB	367.25	395	395	454	565	542	522	443	377	320	272	231	197	167	142	121	103
OSO_BRT_GTS4_HUB	120	120	280	280	280	238	203	172	146	124	106	90	76	65	55	47	40
OTUMARA_FORCADOS_ODIDI_TUNU_HUB	160	160	160	385	525	752	691	638	542	461	392	333	283	241	205	174	148
OVADE_OZIENGBE_OGHAREKI_EFE_HUB	140	140	340	340	340	289	246	209	177	151	28	109	93	79	67	57	48
P3_RESOURCE_OPPORTUNITIES	0	0	0	0	0	0	74	800	1,030	1,212	1,154	1,349	1,189	1,253	1,088	964	867
SAPELE_OBEN_HUB	250	250	465	465	465	395	336	286	243	206	175	149	27	108	92	78	66
USAN_HUB	0	0	0	0	0	72	72	200	200	200	200	177	158	141	127	115	105
UTOROGU_UGHELLI_OKPOKUNOU_ISENI_BRASS_HUB	433.5	434	826	1,080	1,080	1,080	1.080	952	844	752	673	607	550	502	461	426	397
YOHO_HUB	0	0	0	180	240	340	340	340	340	289	246	209	177	151	128	109	93
ZABAZABA_AGBAMI NWA DORO_HUB	0	0	0	0	0	450	530	950	1,215	1,202	1,120	1,049	989	841	798	761	730
Total	**7,669.25**	**7,629**	**10,124**	**13,397**	**14,176**	**15,182**	**15,017**	**15,545**	**15,545**	**15,544**	**15,545**	**15,545**	**15,546**	**15,547**	**15,546**	**15,545**	**15,548**

Nigeria's hub-level supply outlook, thus, underscores the concentration of future production growth in a few critical clusters. Major contributions are expected from hubs such as Gbaran–Soku–Obagi–OBOB, Utorogu–Ughelli–Okpokunou–Iseni, Escravos, Otumara–Forcados–Tunu, and Obigbo–Okoloma–Afam, which form the backbone of near-term output. Several other hubs, including Anyala–Funiwa–Ofrima–Madu and Cawthorne Channel–Nembe–Awoba–Belema, show strong ramp-up potential as CPF expansions come online. To achieve the national target of 10Bcf/d by 2027, an additional 2,300mmscf/d of supply must be unlocked, reinforcing the urgency of accelerating development and investment across priority hubs.

Together, these insights establish a clear roadmap for balancing Nigeria's supply and demand under this GMP and ensuring that gas becomes a true engine of national economic transformation.

2027 and 2030+ Supply Plan and Work Programmes

Ensuring that Nigeria can reliably deliver the gas volumes required to meet NNPC GMP targets depends not only on the size of reserves but also on the readiness of infrastructure across key hubs. The deliverability assessment that was done as a part of NNPC GMP brings together committed and non-committed reserves, proposed CPF upgrades, pipeline requirements, and expected onstream dates to determine which hubs can supply incremental volumes by 2027 and 2030.

Together, these analyses form the operational backbone of Nigeria's national gas expansion roadmap and clarifies what must be done to reach and sustain 10Bcf/d in 2027 and 12Bcf/d by 2030.

Priority Supply Plan and Work Programme for 2027

The 2027 supply plan focuses on the hubs with the most immediate potential to deliver incremental volumes toward the national aspiration of approximately 10Bcf/d. Those with immediate potential include Gbaran_Soku_Obagi_OBOB, Utorogu_Ughelli_Okpokunou_Iseni, Sapele_Oben, Assa North, Oso_BRT_NLNG, and Ovade_Oziengbe_Oghareki_Efe, considering their current onstream volumes and incremental 2027 volumes.

The largest uplift comes from Gbaran_Soku_Obagi_OBOB, where infill wells and reliability improvements position the hub to exceed 2.8Bcf/d under the integrated plan. Utorogu_Ughelli_Okpokunou_Iseni contributes meaningfully, contingent on the NAG-3 and Iseni delivery line, while Assa North's output is contingent on the completion of the Renaissance Midstream GP and the OB3 pipeline. (Exhibit 23)

Exhibit 23: 2027 Priority Supply Plan & Work programme

S/N	HUB	Production Onstream (mmscf/d)	2027 GMP Aspiration (mmscf/d)	2027 NUIMS/ NEPL Strat. Plan (mmscf/d)	2027 (Onstream + NUIMS/NEPL Strat. Plan) (mmscf/d)	Projects/Facilities Required to assure supply
1a	GBARAN_SOKU – 24TCF	1,200 700	2,200	922	2,813	Infill Wells
1b	Obagi_OBOB (TEPNG & OANDO) – 15TCF	400 480	3,100	*387	1,258	Infill Wells & Facility Revamps/ Reliability
2	Utorogu_Ughelli_Okpokunou_Brass (Iseni) – 22TCF	350	850	100	538	NAG-3 & Iseni delivery line
4	Ima Tubu_Bonny_(Tubu Gas-AMNI) – 6TCF	70	50	23	23	Gas gathering / Delivery line to B-NAG
5	Assa North – 8TCF	300	450	156	456	Renaissance Midstream GP/ OB3 Completion
6	Cawthorne Channel_ Nembe_Awoba_ Belema – 10TCF *(100mmscf/d from Awoba)	0	115	116	116	Gas Plant Revamp/ GG System
7	OSO_BRT_NLNG – 8TCF	120	280	240	240	120mmscf/d Compressor capacity expansion / 7km BRT_NLNG line
8	Ovade_Oziengbe_Oghareki_Efe – 2TCF	140	240	52	192	OML 111 Redevelopment (wells)/ Facility reliability
9	Obigbo_Okoloma_Bodo_Imo River – 9TCF	367	150	150	150	OML 11 Okoloma gas re-development
		4,127	**7,755**	**2,146**	**6,106**	
	Other HUBs	1,244	1,244		1244	
	Re-Injection/Flare/Fuel	2,298	2,298		2,298	
	TOTAL	**7,669**	**11,292**		**9,648**	

Onstream supply + 2027 Incremental total about 10BCF/D
Current Gas monetisation is about 60% of total produced gas. Gas monetisation target is to achieve 75% in 2027
*Establish clear pathway for additional volumes from Oando JV

The combined onstream and incremental volumes total approximately 10Bcf/d, contingent on timely completion of infrastructure such as CPF revamps, and pipeline upgrades.

With the 2027 baseload secured, the next step is to outline how Nigeria can reach and sustain higher supply volumes by 2030.

Priority Supply Plan and Work programme for 2030

The 2030 plan builds on the 2027 foundation and adds new incremental capacity from a wider range of hubs. The targeted production level approaches 12Bcf/d from combined onstream and incremental sources, driven by new CPF capacity, pipeline completions, and additional tie-ins.

Key contributors shift as some hubs reach maturity while others expand. Escravos remains a major supplier through CPF expansion and the completion of EOWEP. Anyala_Funiwa_Ofrima_Madu becomes a significant contributor as its CPF comes online and connects to OGGs. Utorogu_Ughelli continues to provide strong volumes through the Okpokunou delivery line and Brass CPF development, while Otumara_Forcados_Tunu accelerates output as the Tunu CPF expansion comes into service.

Offshore hubs such as Yoho also begin delivering more volumes through GG system upgrades and potential FLNG deployment, providing diversification and additional stability to the supply base. (Exhibit 24)

Exhibit 24: 2030 Priority Supply Plan & Work programme

S/N	HUB	Production Onstream (mmscf/d)	2030 GMP Aspiration (mmscf/d)	2030 NUIMS/ NEPL Strat. Plan (mmscf/d)	2030 (Onstream + NUIMS/NEPL Strat. Plan) (mmscf/d)	Projects/Facilities Required to assure supply
1	H-Block – **4TCF**	0	250	250	250	Completion of Hub CPF/ Delivery line to OGGS
2	Yoho – **2TCF**	0	220	*0	0	Yoho GG initiative/ FLNG deployment
3	Escravos – **4TCF**	680	670	379	1059	CPF Expansion/ Completion of EOWEP
4a	Anyala_Funiwa_Ofrima_Madu – **7TCF**	0	430	596	596	CPF Hub Development/ Spur line to OGGS
4b	Antan_Udele – **2TCF**	0	400	400	400	CPF Hub Development
5	Sapele_Oben_(Odidi) – **7TCF**	250	450	200	450	Odidi Gas gathering system/ Tie-in delivery line Oben
6	OSO_BRT_NLNG – **8TCF**	(120)	280	240	480	Twinning of OSO_BRT Line
7	Utorogu_Ughelli_Okpokunou_Brass **(Okpokunou)** – **22TCF**	(350)	850	400	400	Okpokunou_Utorogu Delivery Line / Brass CPF development
8	Bonga – **2TCF**	80	280	164	244	Achieving BN FOD / BSWAp Development
9	Otumara_Forcados_Tunu – **9TCF**	164	750	6	166	GG system at Tunu/ Tunu CPF Expansion
10	Obigbo_Okoloma_Bodo (via Bonny)_Imo River_Afam – **9TCF**	(367)	540	230	457	Okoloma Redevelopment/ Obigbo Network Revamp
11	EAP_QIT_Uquo_Qua Ibo_Utapate **(Volumes from Utapate)**	70	900	900	970	Development of Utapate gas reserves and GPP 3,4,&5
12	Ameshi_Anieze_Okwibome_Izombe (OML 26)	(320)	200	200	500	Gas Evacuation line to GPP1&2 form OML 26 + 300mmscf/d additional train on GPP 1 or 2
13	Ima Tubu_Bonny_(Ima Gas-TEPNG) – **6TCF**	(70)	380	380	380	Gas gathering / Delivery line to B-NAG
		1,244	**6,600**	**4,345**	**5,589**	
	Other HUBs	4,127	4,127		4,127	
	Re-Injection/Flare/Fuel	2,298	2,298		2,298	
	TOTAL	**7,669**	**14,859**		**12,014**	

Onstream supply + 2027 Incremental total about 10BCF/D
Current Gas monetisation is about 60% of total produced gas. Gas monetisation target is to achieve 75% in 2027
*Establish clear pathway for additional volumes from Oando JV

Exhibit 25: 2030+ Priority Supply Plan & Work programme

S/N	HUB	Production Onstream (mmscf/d)	2030 GMP Aspiration (mmscf/d)	2030+ NUIMS/ NEPL Strat. Plan (mmscf/d)	2030+ (Onstream + NUIMS/NEPL Strat. Plan) (mmscf/d)	Projects/Facilities Required to assure supply
1	Ima_Tubu_Bonny(OML 11)– **6TCF**	0	300	300	300	Gas gathering / Delivery line to B-NAG/Expansion of B-NAG
2	Bonga (BSWAP) – **2TCF**	80	280	320	320	BSWAP additional volumes
3	Zabazaba_Agbami_Nnwa-doro – **7TCF**	0	120	120	120	Zabazaba field development Phase I
4	Usan Hub (Owowo)– **1TCF**	0	180	180	180	Development of OWOWO as tie back to USAN FPSO
5	Erha_Bosi– **4TCF**	0	340	340	340	Development of Bosi Gas
		80	**1,220**	**1,260**	**1,260**	

By 2030, monetisation is projected to increase to about 80 percent of produced gas, supported by infrastructure readiness, sustained investment, and commitment in upstream development, reduced reinjection and flaring. Achieving these outcomes requires consistent investment in CPF reliability, pipeline revamps, and hub interconnections. (Exhibit 25)

Thus, the deliverability mapping and priority supply plans for 2027 and 2030 demonstrate that Nigeria has the upstream strength and midstream capacity to meet the national targets outlined under NNPC GMP, provided that critical facility upgrades and pipeline projects are executed on time. Near-term gains depend heavily on debottlenecking and completing backbone infrastructure. Longer-term sustainability relies on maturing additional hub capacity, expanding CPF coverage, improving reliability, and integrating offshore sources through FPSO and FLNG options.

Together, the 2027 and 2030 work programmes form a clear, actionable pathway to achieving 10Bcf/d in the short term and building toward 12–15Bcf/d by the turn of the decade, ensuring Nigeria secures its position as a regional gas powerhouse.

Integrated Upstream and Midstream Supply Architecture

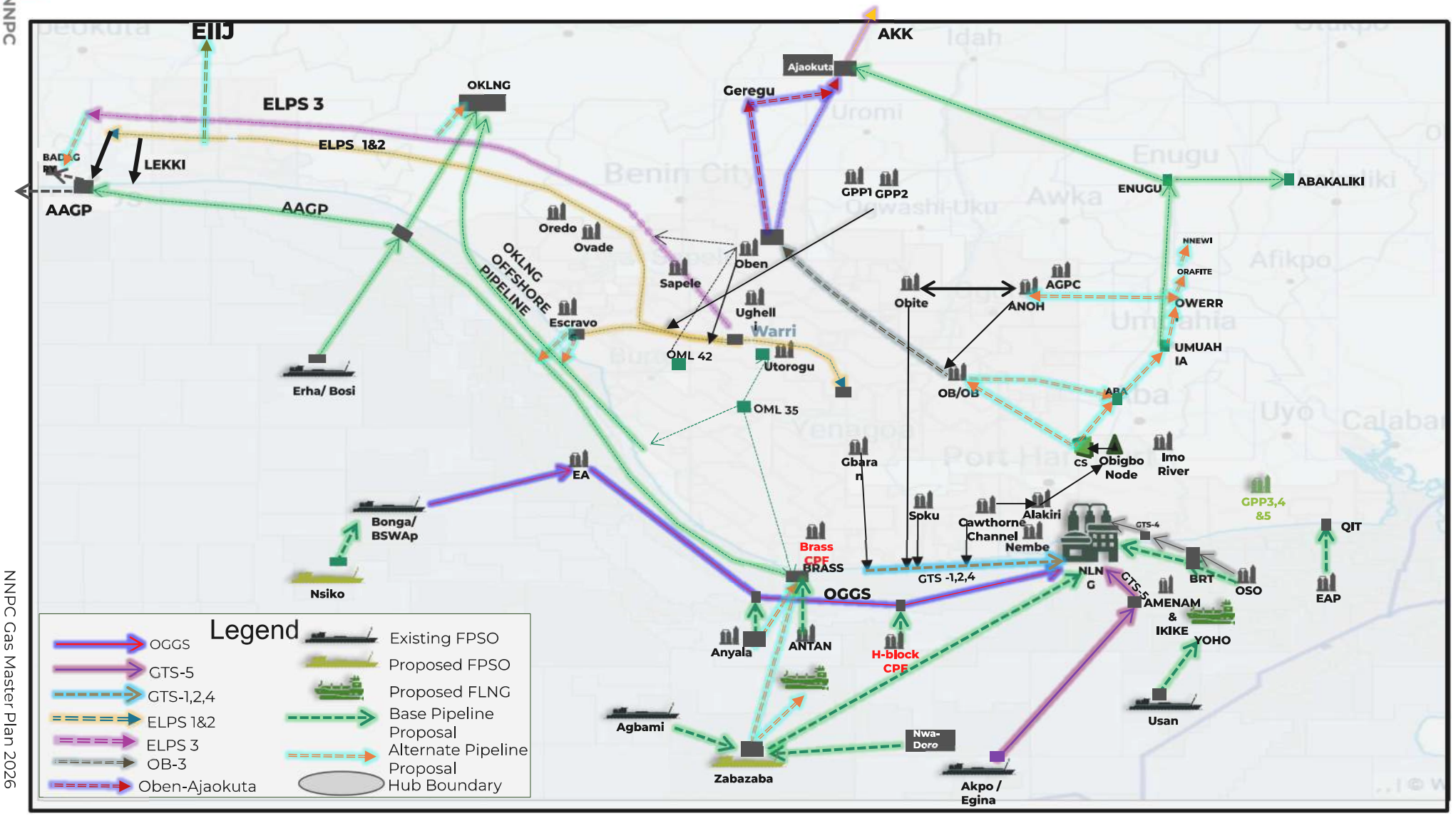
This section illustrates how key producing hubs link into existing and planned gas transportation corridors, how midstream pipelines connect major basins to demand centres, and how integrated upstream and midstream infrastructure form the backbone of the NNPC GMP supply strategy.

Across the full system, the emerging picture is one of coordinated hub development, supported by an expanding pipeline backbone and multiple monetisation pathways. Eight priority hubs, including Gbaran_Soku_Obagi_OBOB, Utorogu_Ughelli, Cawthorne Channel, Oso_BRT_NLNG, Assa North, Sapele_Oben, Ovade_Oziengbe, and Escravos, form the core of near-term supply growth and anchor the upstream landscape. From these hubs, major pipeline corridors such as AAGP, ELPS 1 and 2, OB3, and OGGs transport gas toward key demand centres, linking directly to NLNG, industrial parks, and power generation sites (Exhibit 26).

The system is designed with built-in flexibility, allowing supply to be rerouted through alternate pipeline proposals when needed, depending on commercial priorities, CPF readiness, or infrastructure constraints. In parallel, offshore FPSO and FLNG connections provide further options for monetizing gas volumes, creating a robust and diversified framework that strengthens both domestic supply security and export potential.

This integrated system ensures that hub-level supply is efficiently transported along the optimal midstream corridors, reducing bottlenecks and strengthening supply reliability.

Exhibit 26: Gas Supply Infrastructure Map : Upstream & Midstream



Existing Major Gas Pipelines

1. GTS-1 (Obiafu–Obrikom to NLNG)

- Description: 36" × 149 km
- Capacity: 1,250MMscf/d
- Start: Obiafu–Obrikom
- Terminal: NLNG
- Gas Sources: Obiafu–Obrikom, Soku (600 MMscf/d branch), Obite
- Objective: Deliver wet and dry gas from eastern swamp hubs to NLNG Base Trains.
- Status: Built & operational. GTS-1 provides foundational feed gas to NLNG, integrating multiple JV supply points through branch laterals. It is the main gas supply for Trains 1 and 2

2. GTS-2 (Eastern Gas Gathering System – EGGS)

- Description: 40" × 150 km
- Capacity: 1,400MMscf/d
- Start: Soku
- Terminal: NLNG
- Gas Sources: Soku, Gbaran (tie-in)
- Objective: High-capacity line feeding NLNG expansion trains.
- Status: Built & operational. GTS-2 is NLNG's highest-capacity onshore feed gas trunkline and integrates Gbaran to strengthen supply into Bonny

3. OGGS (Offshore Gas Gathering System – GTS-3)

- Description: 32" × 320 km
- Capacity: 1,200MMscf/d
- Start: Offshore Delta (EA, Bonga, western fields)
- Terminal: NLNG – Train 3
- Gas Sources: Bonga, EA, shallow-water satellites
- Objective: Offshore evacuation and AG monetisation.
- Status: Built; significant spare capacity. OGGS aggregates offshore associated gas for NLNG; Throughput is expected to increase progressively as new offshore assets mature, and the line's available capacity provides an important buffer for future development offtake

4. GTS-4

- Description: 36" × 144 km
- Capacity: 1,250MMscf/d
- Start: Obiafu–Obrikom
- Terminal: NLNG – Trains 4 & 5
- Gas Source: Eni JV eastern fields
- Objective: Twin system providing redundancy for GTS-1.
- Status: Built and in service, Utilisation reflects prevailing upstream production profiles, yet the infrastructure retains significant strategic capacity for future field developments and integration

5. GTS-5 (Amenam–NLNG Offshore System)

- Description: 24"
- Capacity: 710MMscf/d
- Start: Amenam
- Terminal: NLNG
- Gas Sources: Amenam + 580 MMscf/d Akpo deepwater link
- Objective: Offshore dry-gas supply to NLNG.
- Status: Built & operational

6. Escravos–Lagos Pipeline System (ELPS) 1&2

- Description: 36" × 382 km & 36" x 334 (mainline) + 20"/24" x 56km segments from Escravos and 30" x 35km segment from Utorogu
- Capacity: 2.2Bscf/d
- Start: Warri (gas injection from Escravos & Utorogu)
- Terminal: Lagos
- Gas Sources: Escravos, Utorogu, Tunu, Assa North, Ovade, Oredo, etc.
- Objective: National backbone gas system for power & industry.
- Status: Built & operational. Ten power stations are supplied through ELPS. This includes Egbin, Omotosho (I & II), Olorunsogo (I & II), Sapele, Delta, Ihovbor as well as Geregu (I & II) in Kogi state. With multiple gas-based industry off-takers in Ogun, Lagos, and Edo

Existing Major Gas Pipelines

7 Obiafu-Obrikom-Oben (OB3)

- Description: 48" × 112 km + 36" x 18 km
- Capacity: 2.0Bcf/d
- Start: Obiafu
- Terminal: Oben
- Gas Sources: Assa North, ANOH
- Objective: To expand system connectivity, enhance supply reliability, and deliver gas to priority transmission corridors.
- Status: River Niger section under construction; to be completed by 2026

8. ANOH–OB3 Pipeline

- Description: 36" × 23.3 km
- Capacity: 2.0Bcf/d
- Start: Assa North
- Terminal: Obiafu (OB-3 tie-in)
- Gas Source: ANOH CPF
- Objective: Evacuate ANOH gas into the national grid via OB-3.
- Status: Built

9. Oben–Ajaokuta Pipeline

- Description: 24" × 196 km
- Capacity: 470MMscf/d
- Start: Oben
- Terminal: Ajaokuta
- Gas Sources: ELPS
- Objective: Feed gas for Ajaokuta and the AKK.
- Status: Built

10. Oben–Geregu Pipeline

- Description: 36" × 196 km
- Capacity: 550MMscf/d
- Start: Oben
- Terminal: Geregu
- Gas Sources: ELPS
- Objective: Supply Geregu power plants & support AKK feed.
- Status: Built

11. ELPS-LEKKI 1

- Description: 36"x54.5km
- Capacity: 600MMscf/d
- Start: ELPS (Majoda-KP 292)
- Terminal: Lekki
- Objective: Gas Supply to Lekki.
- Gas Sources: ELPS
- Status: Built

12. WAGP

- Description: 20"x678km
- Capacity: 400MMscf/d
- Start: Itoki, Nigeria
- Terminal: Takoradi, Ghana
- Objective: Primarily supplies fuel for power generation, enhancing regional energy security and reducing oil dependence
- Gas Sources: Escravos, Utorogu
- Status: Built

New/Planned Natural Gas Pipelines

1. ELPS-3

- Description: 48" × ~380 km
- Capacity: 2.0Bcf/d
- Start: Escravos
- Terminal: Lagos
- Objective: Provide a dedicated onshore gas-supply line for OK-LNG and expand the existing ELPS-1 and ELPS-2 capacities.
- Gas Sources: Escravos, OML 42, OML 35
- Status: Project Identification Stage

2. EIIJ Pipeline (ELPS–Ibadan–Ilorin–Jebba)

- Description: 36" × 484 km
- Capacity: TBD
- Start: ELPS Pigging Station 4 (Emuren (Ogun State))
- Terminal: Ibadan–Ilorin–Jebba
- Gas Sources: ELPS
- Objective: Gas supply for power heavy industries and power plants.
- Status: FEED Stage

3. Trans-Niger Gas Pipeline (TNGP)

- Description: (TBD)
- Capacity: 1.2–1.5Bcf/d
- Start: Obigbo Node
- Terminal: Ajaokuta
- Gas Sources: Imo River, Alakiri, Cawthorne Channel
- Objective: Enhance the backbone transmission route that channels supply from key gas hubs to demand centres
- Status: Project identification stage

4. AKK Pipeline (Ajaokuta–Kaduna–Kano)

- Description: 40" × 623 km
- Capacity: 2.2Bcf/d
- Start: Ajaokuta
- Terminal: Kano
- Gas Sources: OB-3, ELPS
- Objective: Backbone pipeline for northern demand & mini-grids.
- Status: Main line completed. Block Valves Station (BVS) and Intermediate Pigging Stations (IPS) under construction

5. AAGP – African Atlantic Gas Pipeline (Nigeria Segment)

- Description: 42" × 540 km (Nigerian Segment)
- Capacity: 3.0Bcf/d (30 BCM/year)
- Start: Brass
- Terminal: Badagry → West Africa → Morocco → Europe
- Gas Sources: Brass, Erha-Bosi, Escravos, Deepwater
- Objective: Regional + export pipeline linking Nigeria to Morocco & EU.
- Status: FEED Stage

6. OKLNG Offshore Pipeline

- Description: 48" × 120 km
- Capacity: 1.8–2.0Bcf/d
- Start: Deepwater offshore tie-ins
- Terminal: OK-LNG
- Gas Sources: Escravos, OML 35.
- Objective: Dedicated offshore feed supply OK-LNG.
- Status: Pre-EPC / STG-2 → STG-3

7. ELPS-LEKKI 2

- Description: 36”x54.5km
- Capacity: TBD
- Start: TBD
- Terminal: Lekki
- Objective: Additional Gas Supply to Lekki.
- Gas Sources: ELPS
- Status: FEED Stage

Upstream and midstream connectivity

The mapping of key onshore and swamp hubs shows how major supply centres such as Gbaran_Soku_Obagi_OBOB, Assa North, Cawthorne Channel_Nembe_Awoba_Belema, Ima-Tubu_Bonny, Obigbo_Okoloma_Bodo_Imo river_Afam route gas through GTS-1, OB3, GTS-4/5, B-NAG and CCGP to NLNG and route gas from hubs such as Escravos Hub, Sapele-Oben, Ovade_Oziengbe_Oghareki_Efe, Utorogu_Ughelli_Okpokonou_Iseni through ELPS and OB3 to the domestic markets (industrials) and to WAGP, OKLNG, AAGP and AKK creating a foundational network for supply stability. (Exhibit 27)

The offshore system adds further flexibility, with deep and shallow water assets such as Bonga, Erha–Bosi, Akpo–Egina, Nsiko, Usan, and Zabazaba connecting into OGGS, GTS4/5 to deliver to NLNG and AAGP. Other hubs such as EAP_QIT_Uquo_Qua-Ibo_Utapate connecting through QIT Umuahia Ajaokuta network into AKK, Utapate through new CPFs to Stanch fertilizer and Yoho to UTM FLNG. These all help to strengthen domestic and export supply routes. (Exhibit 28)

Exhibit 27 : Gas Supply & Infrastructure Mapping – Onshore & Swamp (Base & Options)

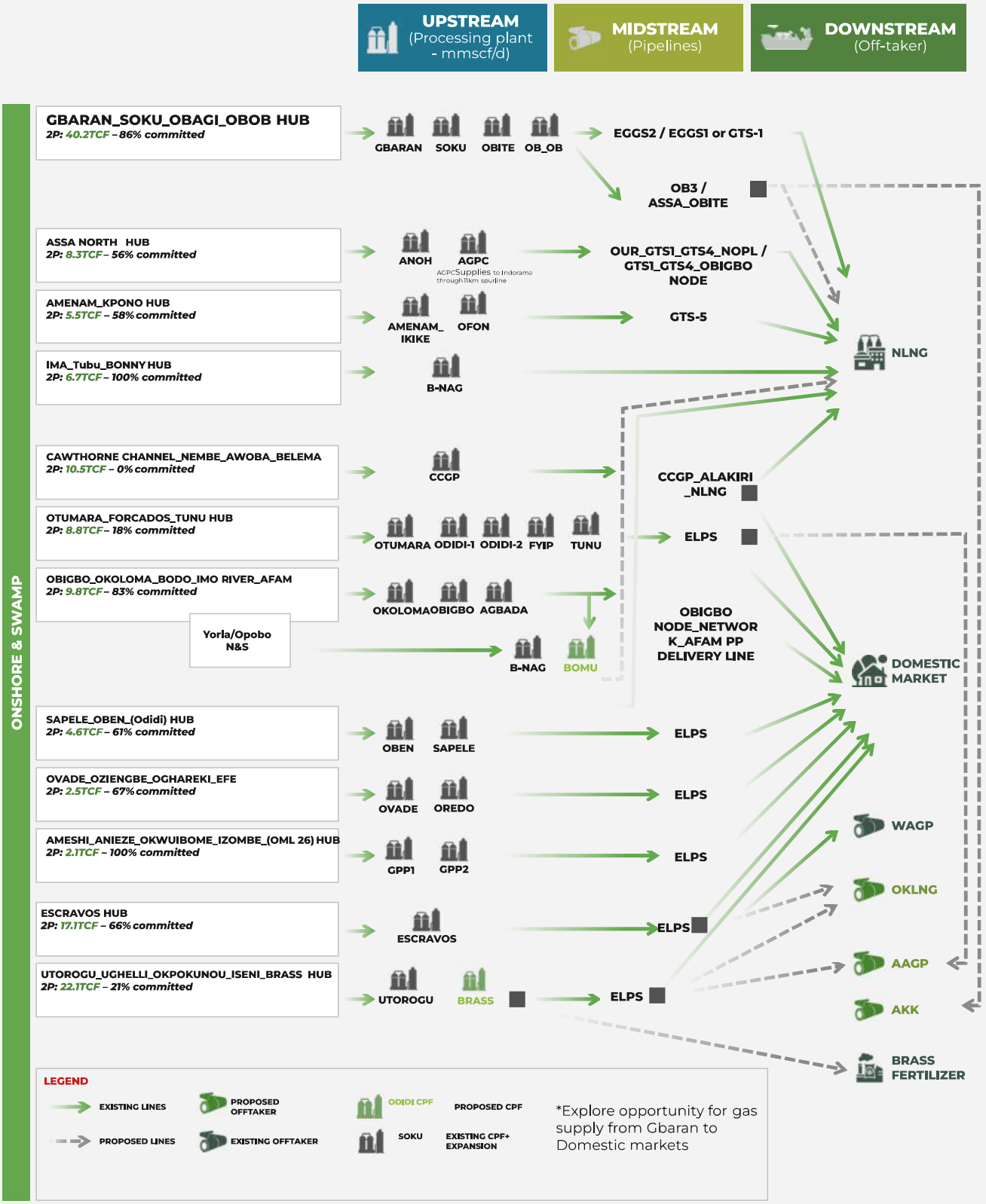
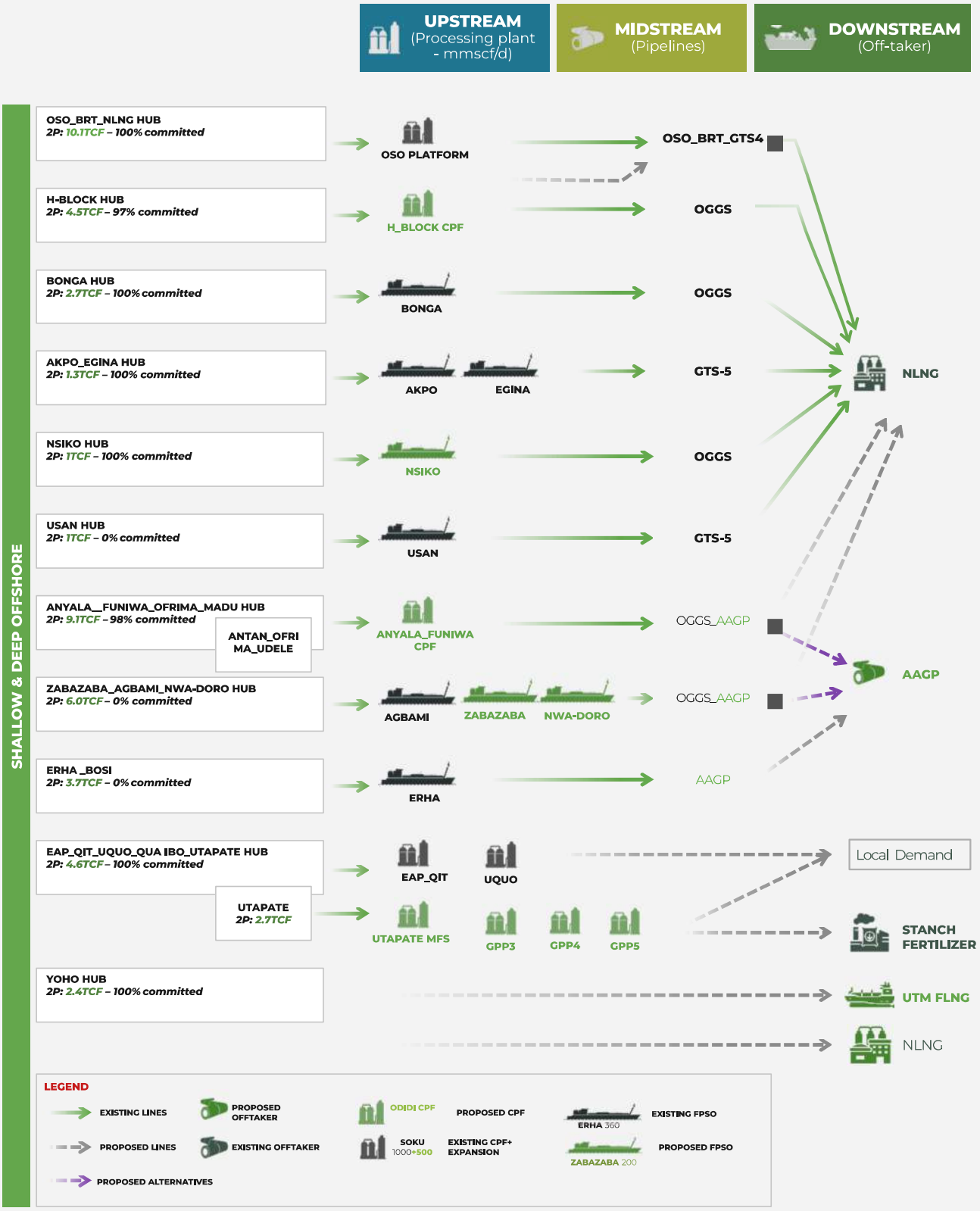


Exhibit 28 : Gas Supply & Infrastructure Mapping – Shallow & Deep Offshore (Base & Options)



Demand Centres and Required Supply Pathways

With the core supply and transport network established, the next priority is to understand how this system aligns with the major gas demand centres across LNG, power, industry, and CNG.

The mapping of demand shows significant gas requirements across LNG expansions, power generation, gas-based industries, and growing CNG markets. LNG demand alone exceeds 3,500mmscf/d across NLNG T7–T9, OKLNG, UTM FLNG, and PRIME LNG, relying on supply from hubs such as Oso, Anyala_Funiwa, Cawthorne Channel, Okoloma, Ima–Tubu, and Escravos mainly via AAGP, ELPS (mainly via GTS1, 4/5, OGGS and B-NAG for NLNG, Offshore Pipeline for OKLNG and ELPS for most of others. (Exhibit 29)

Industrial and fertiliser projects, including Brass Methanol, Stanch Fertiliser, Dangote, and Indorama, draw from hubs like Okpokunou, Utapate, EAP-QIT, OML 42 (Odidi- Iseni-Okpokonou), Cawthorne Channel and Gbaran–Soku, leveraging strong midstream linkages to ELPS, NOPL, and the New Okpokunou–Brass Line. (Exhibit 30)

All industrial parks projects draw from either Assa North, EAP-QIT, Ameshi_Anieze_Okwibome_Izombe_OML 26, or the Otumara_Forcados_Tunu/Utorogu hubs, leveraging midstream supply mainly through AKK and ELPS.

Exhibit 29 : Gas Supply & Priority Projects Demand Mapping

SECTOR	DEMAND & SUPPLY MAPPING				
	Demand Centre	Daily Gas requirement (mmscf/d)	Midstream supply Line	Supply Centre (HUB)	2P Reserve (TCF)
LNG	NLNG T7 (Additional)	200	GTS-4	Oso_BRT_NLNG	4
	NLNG T8 & T9	1,325	OGGS	Anyala__Funiwa_Ofrima_Madu	9
			GTS-1 / GTS4	Cawthorne Channel_Nembe_Awoba_Belema	10
			B-NAG Line	Okoloma_Bodo hub (Bomu, Yorla, Opobo N&S)	9
				Ima_Tubu_Bonny (Bonny & Bonny North)	4
	OKLNG	1800	AAGP	Utorogu_Ughelli_Okpokunou	22
				Escravos Hub	17
	(1.8MMTPA) UTM FLNG	220	SPUR LINE	Yoho	2
	(0.15MMTPA) PRIME LNG	30	ELPS	Utorogu/Odidi Hub	22+4
	NGML Gasnexus	15	ELPS		
	HIGHLAND LNG	15	ELPS		
	Bridgeport LNG Lekki	90	ELPS		
	Chevron FLNG	250	Offshore Gas Netw.	Escravos	17
	Ajaokuta Mini LNG	15	AKK	Assa North	8
	Calabar Mini LNG	15	SPUR LINE	EAP_QIT	
POWER	(480MW) OKPAI II	75	SPUR LINE	Ameshi_Anieze_Okwibome_Izombe Hub	2
	IKOT ABASI POWER -	100	EAP	EAP_QIT	3
	(540MW) AFAM II: PH-1 180MW, PH-2 360MW	110	Okoloma GP to Afam M/S	Obigbo_Okoloma_Bodo_Imo River	9
	(1420MW) AGURA EGBIN II	250	ELPS	Otumara_Forcados_Tunu	11
	(350MW) GIPP PH-1 ABUJA	100	AKK	Assa North	8
	(90MW) KADUNA IPP PH-1	20			
	(450MW) KADUNA IPP PH-2	90			
	MBH Power	100			
	(540MW) KANO IPP PH-1 & 2	110			
	(50MW) MEPP	8.7			

Exhibit 30 : Gas Supply & Priority Projects Demand Mapping

SECTOR	DEMAND & SUPPLY MAPPING				
	Demand Centre	Daily Gas requirement (mmscf/d)	Midstream supply Line	Supply Centre (HUB)	2P Reserve (TCF)
GBI	(1.8MMTPA) BLACKROSE METHANOL	145	EAP	EAP_QIT	3
	(1.5MMTPA) NSIA – OCP	150			
	(3.5MMTPA) BRASS FERTILIZER (BFPCL)	340	New_Okpokuno _Brass Line	Okpokunou_Brass CPF	22
	(2.19MMTPA) STANCH FERTILIZER	100 *(900)	SPUR LINE via GPP 3,4&5	Utapate	3.5
	Dangote Fertilizer Limited (DFL)	450	New ELPS-LEKKI	OML 42 (Odidi), Iseni, & Okpokunou	4.5+4.3+1.6
	INDORAMA T3 & T4 NOTORE I & II	340 55 & 200	NOPL/Obigbo Network	Cawthorne Channel_Nembe / Gbaran_Soku Hubs	10
INDUSTRIAL PARKS	GWAGWALADA INDUSTRIAL	100	AKK	Assa North	8+3
	KANO INDUSTRIAL PARK	200			
	SULEJA INDUSTRIAL PARK	25			
	KARU INDUSTRIAL PARK	50			
	KWALE GAS PARK	100	ELPS	Ameshi_Anieze_Okwibome_Izombe_OML 26	2
	OWERRI INDUSTRIAL PARK	10		Assa North	8
	WALTERSMITH PARK	10			
	EPE/LEKKI INDUSTRIAL PARK	200		Otumara_Forcados_Tunu/ Utorogu	22+11
	BADAGRY INDUSTRIAL PARK	100			
	YUP INDUSTRIAL PARK	100			
	IBAKA INDUSTRIAL PARK	200	EAP	EAP_QIT	3

Meanwhile, emerging CNG infrastructure requires distributed supply from Sapele–Oben, Assa North, EAP–QIT, Otumara, Utorogu, and other hubs, mainly via AKK and ELPS, with each project requiring small but cumulative volumes of around 5mmscf/d. (Exhibit 31)

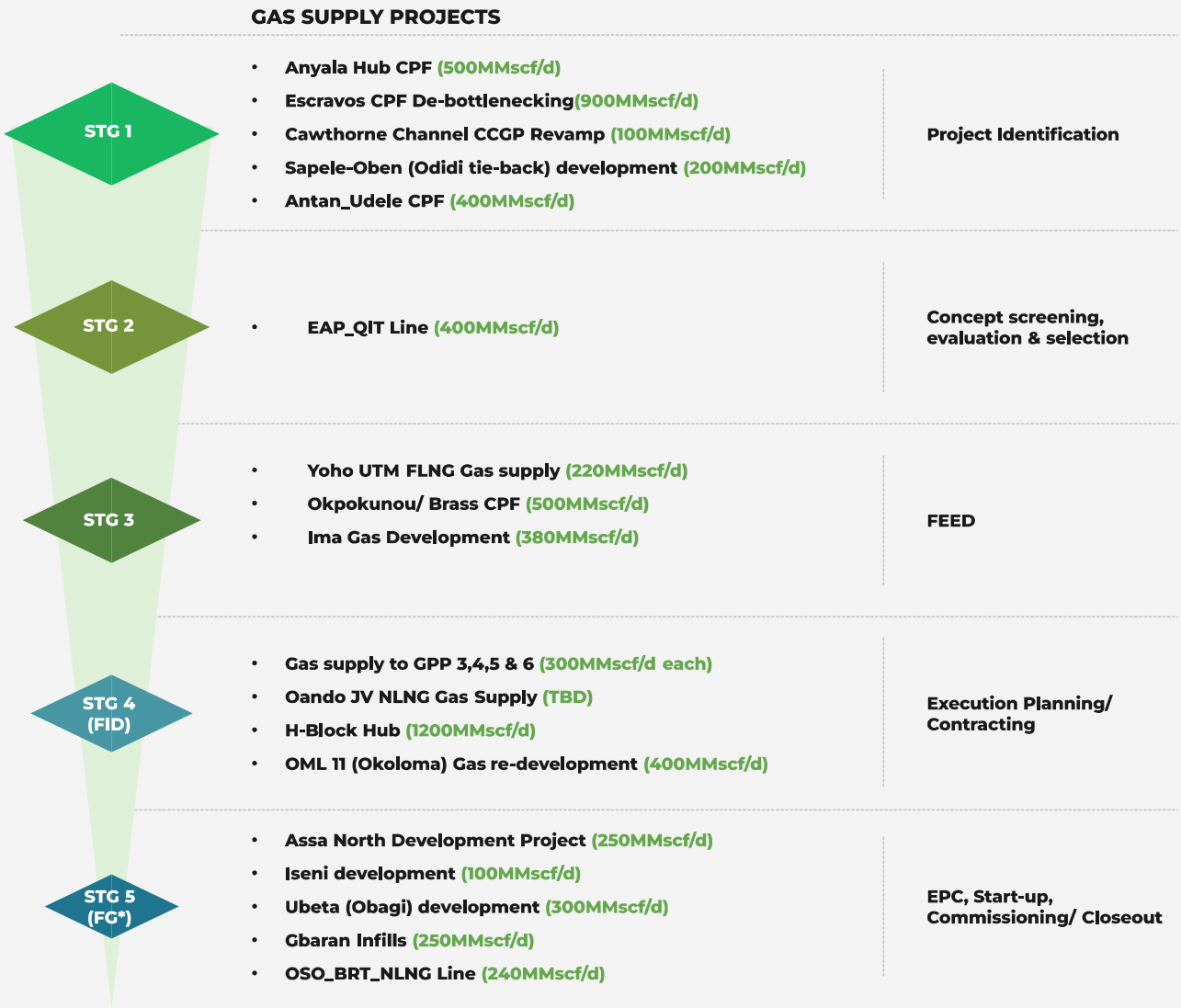
Exhibit 31 : Gas Supply & Priority Projects Demand Mapping

SECTOR	DEMAND & SUPPLY MAPPING				
	Demand Centre	Daily Gas requirement (mmscf/d)	Midstream supply Line	Supply Centre (HUB)	2P Reserve (TCF)
CNG	NGML-Axella CNG Plant – Illasamaja	5	ELPS	Sapele_Oben_(Odidi)	2
	NGML-Axxela CNG Plant - Ijebu Ode	5			
	NGML-Axxela CNG Plant – Uyo	5	SPUR LINE	EAP_QIT	3
	NGML- Axxela CNG Plant - Ohaji, Imo	5	SPUR LINE	Assa North	8
	NGML-Axxela CNG Station, Kano, Kano	5	AKK	Assa North	8
	NGML-Axxela CNG Station, Abuja	5			
	NGML-Axxela CNG Station, Kaduna	5			
	MBH Power CNG	5	AKK/ELPS	Utorogu/EAP/Otumara Hubs	22+11+3
	GUELPH CNG	5			
	Power Gas Investment	5			
	A4E CNG MS	5			
	Green Fuels CNG	5			
	STARGAZ CNG	5			
	TOTAL SUPPORT CNG	5			
	NRL – Abuja L-CNG	5	AKK		
	NRL – Kano L-CNG	5			
	Ajaokuta CNG	5			
	Calabar CNG	5			
PIPELINE	African Atlantic Gas Pipeline (AAGP) Project	3,500	AAGP	Utorogu_Ughelli_Okpokunou_Brass/ Zabazaba/ Erha Bosi	22+7+3
	Trans-Saharan Gas Pipeline (TSGP) Project	2,000	AKK	TBD	TBD

Maturation Pathways for Upstream Priority Projects

The upstream project maturation pathway outlines how each supply initiative progresses from identification to commissioning and provides a consolidated picture of readiness across the portfolio. (Exhibit 32)

Exhibit 32 : Priority Project Maturation - Upstream



*FG : First Gas

Early-stage projects such as the Anyala CPF upgrade, the Escravos CPF debottlenecking and Cawthorne Channel CCGP revamp are currently in the identification and concept screening phases while Ima/Tubu development is in advanced stages of FEED. These represent the foundation for medium-term growth.

More advanced projects, including the Yoho UTM FLNG supply, and the Okpokunou/Brass CPF, are moving through FEED and execution planning. These assets are vital contributors to 2027–2030 throughput and require accelerated interface alignment with midstream pipelines to ensure timely delivery.

At the cusp of FID, major developments such as the GPP 3, 4, 5 and 6 supply systems, H-Block hub expansion, and OML 11 re-development represent the most immediate opportunities for volume uplift. Finally, projects already beyond FID, including Assa North, Oso–BRT–NLNG line, Iseni, Ubeta, and Gbaran infills, form the reliable backbone of short-term production growth. Collectively, this sequencing ensures that Nigeria builds a pipeline of investable projects that can deliver 10Bcf/d in 2027 and expand toward 12–15Bcf/d by 2030.

With upstream maturation clarified, attention shifts to the midstream systems required to move these products reliably to market.

Midstream Project Maturation and System Integration

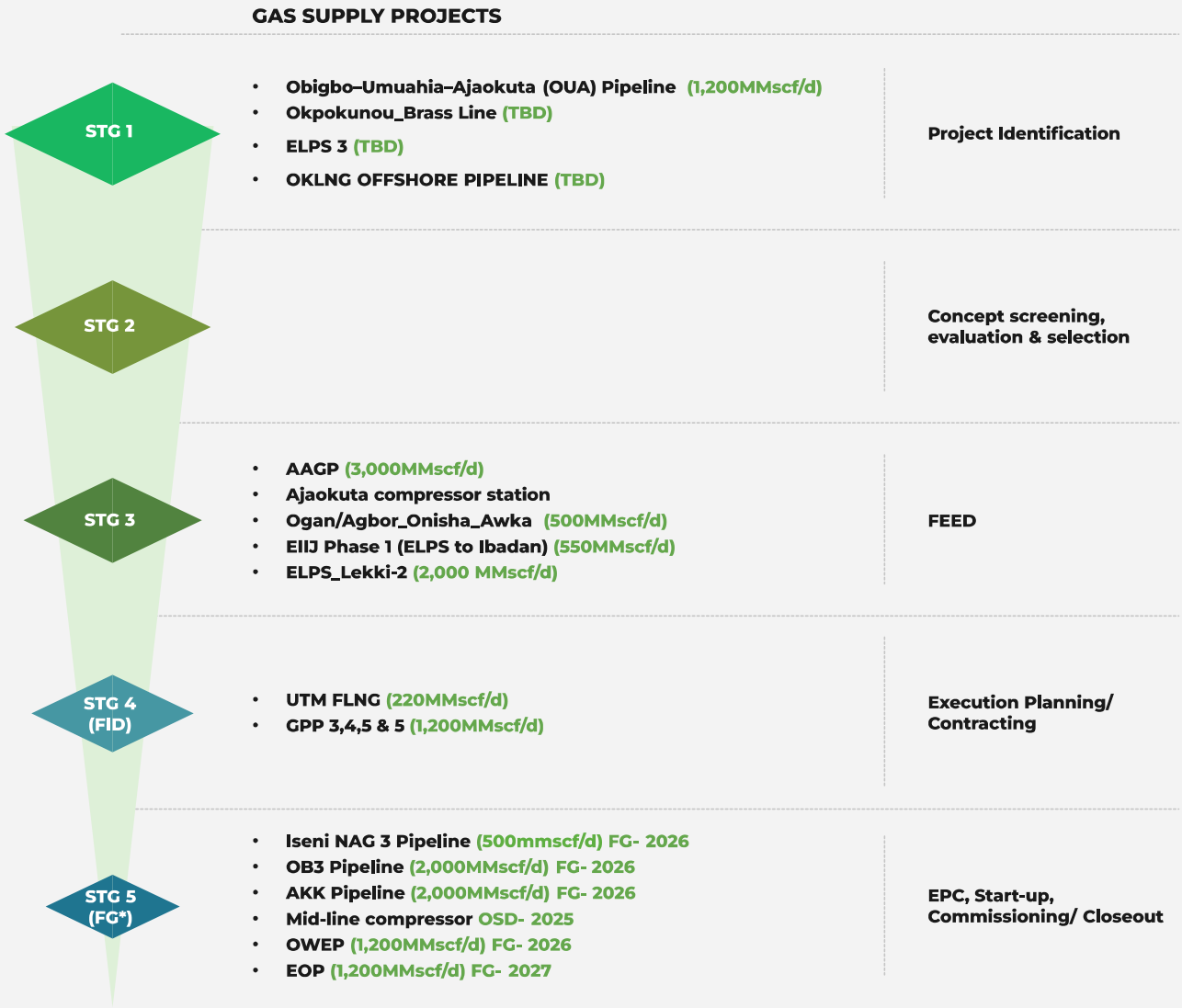
The midstream pathway mirrors the upstream sequence but focuses on the infrastructure required to move molecules from source to market, making it the central enabler of NNPC GMP's success. (Exhibit 33)

Early-phase projects such as the Obigbo–Umuahia–Ajaokuta line, and the New Okpokunou–Brass Line are undergoing concept selection and represent the long-term backbone of Nigeria's gas transmission architecture.

More mature midstream developments, including, the African Atlantic Gas Pipeline (AAGP), the Ogan/Awka compressor station, and EIIJ Phase 1 (ELPS to Ibadan), and ELPS–Lekki–2 are progressing through FEED, while UTM FLNG, GPP 3, 4, 5 and 6 are progressing through execution planning phase. These assets provide the critical interconnection capacity required to move gas from high-impact hubs into both domestic and export markets.

The most advanced midstream infrastructure, heading toward FID or currently in EPC, includes the OB3 expansion, the AKK pipeline system, the Iseni NAG-3 pipeline, and mid-line compressors under the OWEP development umbrella. These projects will resolve long-standing bottlenecks, enhance redundancy, and create new evacuation corridors capable of supporting sustained gas growth across the decade.

Exhibit 33 : Priority Project Maturation - Midstream



*FG : First Gas

Based on these analyses, Nigeria can deliver rapid, bankable volume increases by focusing first on high-impact, lower-complexity hubs and accelerating projects already approaching FID. At the same time, advancing the next wave of upstream and midstream projects ensures that growth is sustained, reserves remain balanced, and the infrastructure backbone expands in line with demand. This integrated approach positions NNPC GMP to deliver reliable supply, unlock investment and support the country's broader industrial and economic transformation.

CHAPTER 5

Governance & Implementation

Digitalisation Roadmap for NNPC GMP

The successful execution of NNPC GMP depends not only on securing gas supply and infrastructure but also on building the operational backbone. This includes digital systems, risk controls, and governance structures that will sustain implementation over time.

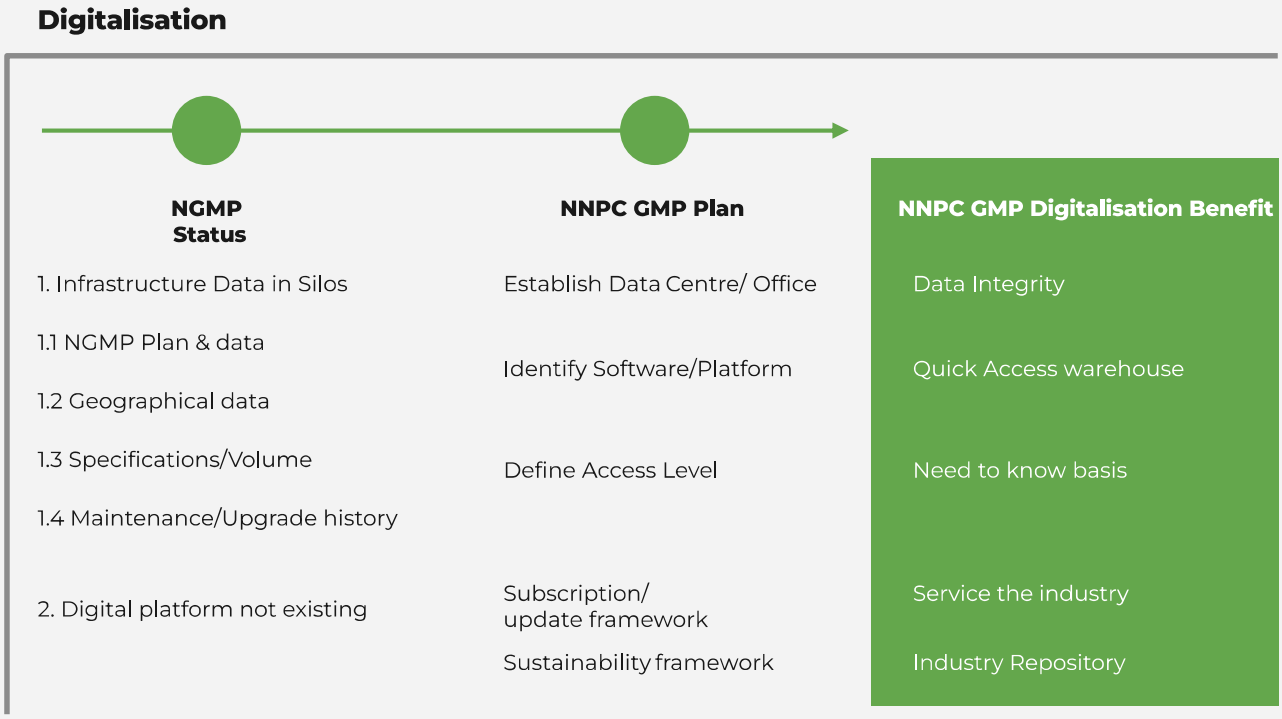
To establish the foundation for NNPC GMP delivery, the priority is to first build the digital systems that will enable transparency, coordination, and long-term sustainability.

Digital transformation sits at the core of NNPC GMP, addressing long-standing data fragmentation challenges that have limited visibility, accuracy, and timely decision-making. Under NGMP, infrastructure information such as engineering specifications, production history, and maintenance records remained siloed across business units with no central digital platform.

NNPC GMP introduces a structured digitalisation plan aimed at consolidating data, improving access, and enabling long-term sustainability. The programme prioritises the establishment of a dedicated data office, selection of a unified digital platform, clearer access-level definitions, and a subscription-based update framework to ensure transparency and for regular update.. These initiatives will deliver significant benefits, including improved data integrity, fast access to operational information, enhanced industry-wide service collaboration and a centralised repository that can support future planning and regulatory compliance.

Complementing the digital strategy is a renewed focus on awareness and communication. This includes national sensitisation efforts, internal awareness campaigns, and strengthened communication channels that ensure industry alignment, stakeholder buy-in, and long-term support for the NNPC Gas Master Plan. (Exhibit 34)

Exhibit 34 : NNPC GMP Digitalisation Roadmap

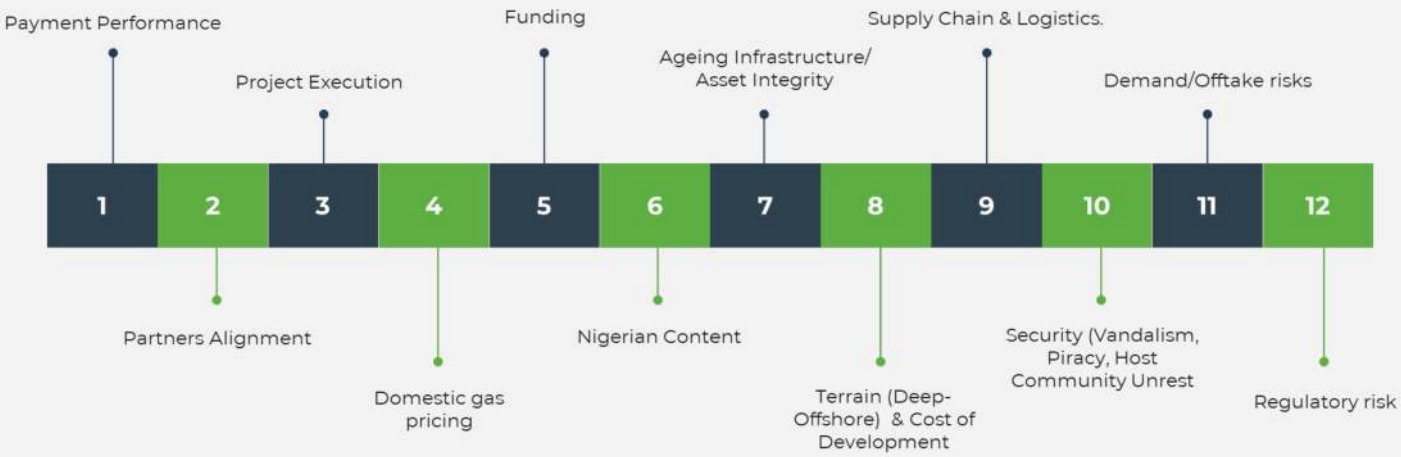


With the digital backbone defined, the next step is to assess the risks that could hinder NNPC GMP implementation and identify measures to mitigate them.

Risk Register and Mitigation Framework

A comprehensive risk register highlights the key threats that could impact NNPC GMP delivery across the upstream, midstream, and downstream segments. Major risks include payment performance challenges, partner misalignment, project execution delays, domestic gas pricing uncertainties, and funding constraints. Sector-wide issues such as aging infrastructure, Nigerian content requirements, supply chain bottlenecks, deepwater terrain costs, security concerns, and regulatory unpredictability also pose significant hurdles. (Exhibit 35)

Exhibit 35 : Risk Register



NNPC GMP proactively outlines mitigation strategies for each risk category. These include early stakeholder engagement, strengthened project management processes, flexible pricing frameworks, phased CAPEX planning, partnerships with competent local firms, improved asset integrity systems, enhanced procurement planning, and targeted community engagement programmes. For critical offtake and market risks, measures such as take-or-pay structures, escrow arrangements, and credit enhancement tools (including bank guarantees) have been prioritised to improve supply security and commercial viability.

This structured approach ensures that NNPC GMP implementation is grounded in realistic assessments and supported by actionable measures that reduce exposure to operational or financial shocks. Once the major risks are understood, attention turns to the concrete actions required to translate the NNPC Gas Master Plan into executable steps.

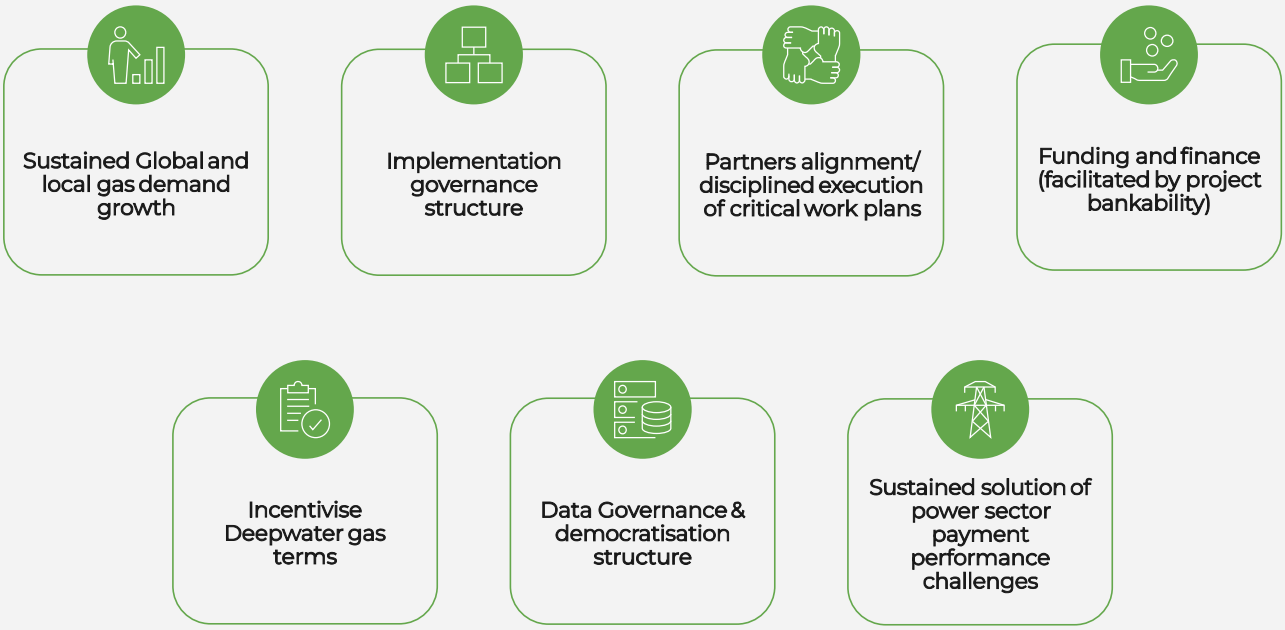
CHAPTER 6

Critical Enablers

NNPC GMP Success Enablers

To ensure delivery of the NNPC GMP, there are some key success factors or enablers that need to be in place which include sustained demand for gas globally and domestically, an implementation governance structure to ensure sustained delivery of the plan, partner alignment to ensure adequate buy-in on the plans, funding backed by bankability of the various gas projects, incentives, commercials and fiscals that make projects attractive e.g., gas terms to attract investment into deepwater gas development and resolution of power sector challenges to improve attractiveness of gas to power value chain, among others. (Exhibit 36)

Exhibit 36 : Enablers / Critical Success Factors

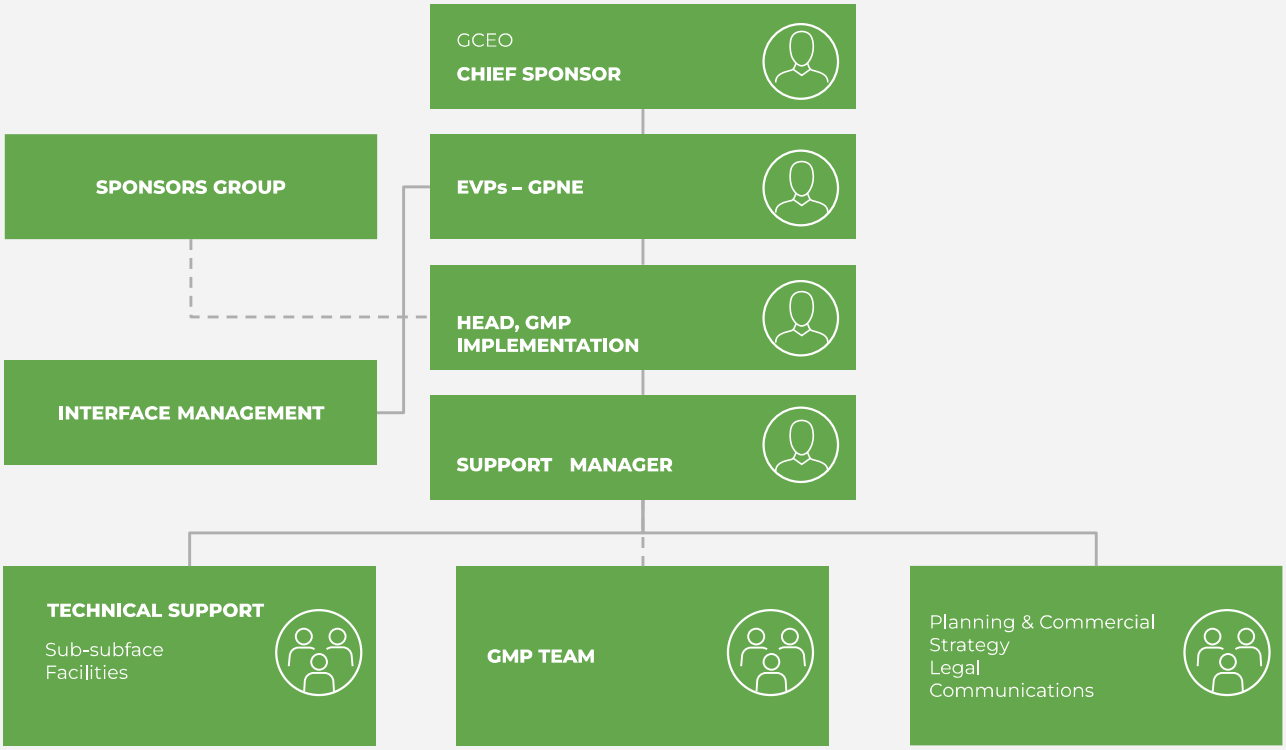


Governance Framework for NNPC GMP Implementation

To ensure robust and transparent execution, a dedicated governance framework has been proposed for NNPC GMP. Leadership rests with a Head of GMP Implementation Assurance Team (IAT), supported by managers responsible for cluster oversight across gas assets. This structure ensures direct engagement with operators, centralised tracking of project progress, and streamlined coordination with EVPs and sponsor groups.

The governance model incorporates specialist teams covering subsurface, facilities, planning, commercial strategy, legal, and communications, ensuring a multidisciplinary approach to implementation. This governance framework is essential for driving cross-functional alignment, accelerating decision-making, and maintaining the momentum required to deliver NNPC GMP outcomes. (Exhibit 37)

Exhibit 37: NNPC GMP Implementation Governance



- Head GMP implementation to manage on a day to day the implementation of the work programme, closing of gaps and interface management.
- GMP Team to be retained with monthly implementation performance review amongst other responsibilities.
- GMP execution excellence consultant to provide critical layer of delivery excellence assurance.

NNPC GMP Action Plan and Implementation Steps

To translate the Gas Master Plan into executable actions, NNPC GMP lays out a coherent set of near- and medium-term steps that bring together all key stakeholders. The process begins with targeted internal and external workshops designed to align stakeholders around development priorities and refine the detailed 2027 and 2030 supply programmes. Alongside this engagement, comprehensive economic evaluations are being carried out across upstream and midstream projects to identify viability gaps, optimise commercial structures, and adjust pricing frameworks where required.

A strengthened governance architecture underpins these activities. A dedicated GMP implementation structure within the NNPC gas and power directorate will provide central oversight across upstream, midstream, and downstream operations, supported by quarterly implementation reviews with initiative owners and sponsors to maintain discipline and transparency.

At the strategic level, the programme deepens its integration with the Decade of Gas, ensuring policy coherence and reinforcing national gas supply commitments.

Operationally, NNPC GMP accelerates exploration and appraisal activities across hubs to secure a sustainable production base, while simultaneously unlocking domestic gas commercialisation and fostering a more competitive market environment. To safeguard long-term system integrity, the plan incorporates stress-testing of both committed and uncommitted gas volumes to validate the durability of hub supply under different development scenarios. Finally, the creation of a comprehensive data governance and democratisation framework ensures that NNPC GMP data is securely housed, consistently updated, and accessible to the institutions responsible for delivery. (Exhibit 38)

Exhibit 38 : NNPC GMP Action Plans/Next Steps

S/N	REQUIRED ACTION	ACTION PARTY	TIMELINE
1a	NNPC GMP 2026 Launch	GMP Team/CCC	30th January 2026
1b	Hold External stakeholder Workshop (Upstream Operators) to test the appetite of key Upstream players' disposition toward investment, and align on detailed implementation plan (Cost, Schedule, & Project execution risk) of 2027 & 2030 Supply programme	GMP Team/Upstream Operators	Week of 9th February 2026
2	Perform Economic Evaluation and commercial viability on all upstream & Midstream supply projects, Identify gaps & seek revision in business model (Gas pricing) to underpin FID	NUIMS & NEPL/Midstream/GMP Team	Q1 2026
3	Establish GMP implementation/Governance structure which domiciles in EVP GPNE's office and covers midstream, Upstream, and downstream	GMP Team/EVP GP&NE Office	Q1 2026
4	Establish Quarterly implementation review with Initiative owner and Sponsors Group.	GMP Team/EVP GP&NE Office	Q1 2026
5	Establish a GMP interface/connection with Decade of Gas and Upstream Operators (Gas Suppliers)	GMP Team/EVP GP&NE Office	Q1 2026
6	Develop Multi-year initiatives to be stewarded by Asset Managers to drive implementation of NNPC Gas Master Plan	NUIMS/NEPL/GMP Team	Q1 2026
7	Mature potential Demand projects to GPO/GSA stage	GACN, NGPIS	Q1 2026
8	Provide support to acceleration exploration potentials across the hubs to maintain long-term production plateau	NUIMS & NEPL/GMP (to track progress)	Q1 2026 to 2027
9	Propose action and key Regulations required to promote Domestic Gas market business model that enables investment	GMP Team	Q1 – Q2 2026
10	Provide support for Upstream to accelerate key commercial terms for deep water	GMP Team /CSS	Q1 2026
11	Stress test the committed and uncommitted / DGSO volumes across hubs in line with current project viability & timing	GMP Team/NUIMS/NEPL	Q1 2026
12	Set up data governance and democratisation framework to house and protect NNPC GMP data leveraging technology for sustainability	GMP Team	Q1 2026

Together, these measures form a structured, time-bound roadmap that shifts NNPC GMP from concept to implementation, supported by clear ownership and accountability across NNPC and its partners.

With the implementation steps in place, it becomes essential to connect these actions to the specific deliverables that will define NNPC GMP's success.

Deliverables and Performance Alignment

The NNPC GMP plan aligns directly with the 12 key deliverables that anchor national gas aspirations for 2027 and 2030.

Mapping these deliverables against the NNPC GMP demonstrates strong conceptual alignment. For each deliverable, the NNPC GMP articulates specific initiatives from gas hub modelling to infrastructure expansion opportunities that will drive measurable outcomes in both domestic and export markets. (Exhibit 39)

Exhibit 39 : NNPC GMP Plan Vs Deliverables

S/N	DELIVERABLES	NNPC GMP Plan	TIMELINE
1	Assure delivery of 10Bcf/d & 12Bcf/d of gas Production in 2027 & 2030 respectively	Captured in NNPC GMP Plan	2027 - 2030
2	Deliver minimum of 3.5Bcf/d of gas to Domestic market by 2027	Gas supply mapping for critical domestic demand centers captured in NNPC GMP	2027
3	Develop clear strategies for cost optimisation in the gas sector	Gas Hub approach in NNPC GMP to leverage on existing infrastructure	2027
4	Support Gas to Power, CNG & Mini LNG	Gas supply mapping to support Power, Mini LNG and CNG in NNPC GMP	2027
5	Minimise gas re-injection and eliminate gas flaring by 2027	Developing robust gas infrastructure plan for gas evacuation and commercialisation in NNPC GMP	2027
6	Facilitate gas supply to GBIs	Gas supply mapping for GBIs in NNPC GMP	2027-2030
7	Leverage on Decade of Gas initiative for attainment of key objectives of the NNPC GMP.	NNPC GMP focuses on providing additional incremental volumes to meet domestic export and regional demand	2027-2030
8	Acceleration of Deepwater Gas Development	Ongoing engagements on gas value rights with Deepwater contractors (e.g Owowo, BSWAp, & Bosi)	2027-2030
9	Provide support in terms of gas supply for AAGP	Gas supply mapping for AAGP in NNPC GMP	2027-2030
10	Accelerate the development of required additional gas infrastructure	Identified opportunity for additional infrastructure to close supply gap in NNPC GMP	2027
11	Facilitate Gas Hub Concept and efficient expansion of gas processing plants	Robust Gas Hub concept to drive NNPC GMP developed	2027
12	Support development of willing buyer-willing seller commercial approach in the gas sector	Stakeholder engagement ongoing targeted towards price modulation and additional regulatory involvement	2026-2030

To ensure sustained progress, these deliverables must be supported by a strong governance framework capable of driving accountability and coordination.

NNPC GMP thus represents a major step change in how Nigeria plans, manages, and delivers gas. The digitalisation roadmap lays the foundation for transparent and data-driven operations, the risk management framework strengthens resilience against market supply, operational, and regulatory uncertainties, the detailed action plan ensures that delivery is structured, sequenced, and accountable, and the governance model provides the institutional backbone required for sustained progress and monitoring.

Together, these elements transform NNPC GMP from a strategic aspiration into an executable national programme capable of unlocking Nigeria's full gas potential, strengthening energy security, and supporting long-term industrial and economic growth.

Appendix

2026 Work programme Deliverables

S/N	NUIMS	2026
1	**RENAISSANCE**	690.8
2	**SEEPCO***	286.9
3	**TEPNG**	196.0
4	**SEPNU**	141.8
5	**HEIRS**	83.9
6	**CNL**	24
7	**ESSO**	23.3
8	**NEOL**	12
9	**NEMBE**	11.3
10	**ENAGEED**	8.2
11	**SEPLAT (OML 53)**	6.4
12	**PPL**	5.5
13	**PANOCEAN**	4.0
14	**NEWCROSS**	2.5
	TOTAL (mmscfd)	**1,496.6**

** Further validation to be done to assure SEEPCo volumes*

S/N	NEPL	2026
1	**OML 11 (NEPL)**	63.3
2	**OML 60, 61, 62, 63 (Oando)**	58.5
3	**OML 4, 38, 41 (Seplat)**	37.4
4	**OML 13 (NEPL)**	23.7
5	**OML 34 (NEPL)**	23.5
6	**OML 111 (NEPL)**	12.7
7	**OML 42 (NEPL)**	10.1
8	**OML 98 (NEPL)**	4.4
	TOTAL (mmscfd)	**223.6**

NEPL to deliver minimum of 300mmscf/d in 2026

- Total 2026 expected additional volumes from NUIMS & NEPL is **1.8bcf/d**.
- Achieving 2026 Work programme is critical to meeting the mandate of 10bcf/d in 2027 and 12bcf/d in 2030.

GMP HUBS

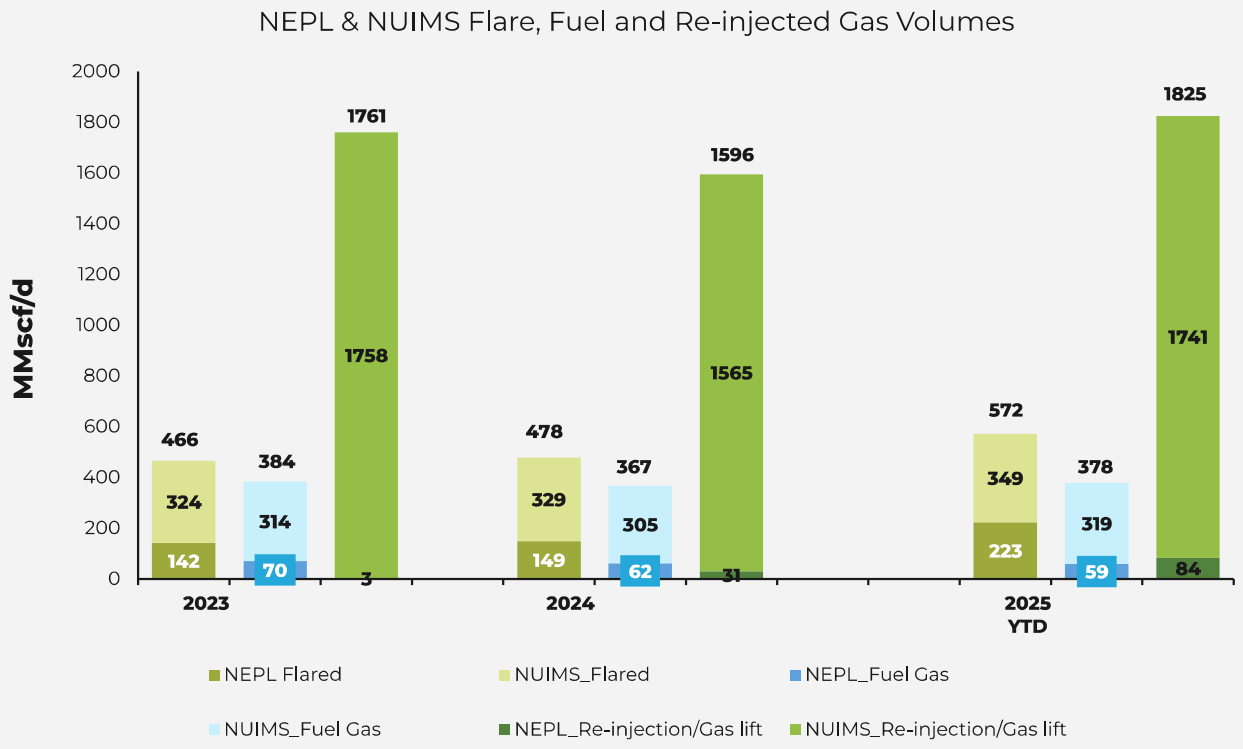
S/N	GMP HUBS	OMLs
1	GBARAN_SOKU_OBAGI_OBOB HUB	21, 22, 23, 27, 28, 32, 60, 61, 62, 63
2	UTOROGU_UGHELLI_OKPOKUNOU_ISENI_BRASS HUB	30, 31, 32, 34, 35, 65, 79
3	ESCRAVOS HUB	49, 51, 89, 90, 91, 95, 103, 108, 109, 110
4	OTUMARA_FORCADOS_TUNU HUB	27, 28, 31, 36, 40, 43, 45, 46, 49, 64
5	CAWTHORNE CHANNEL_NEMBE_AWOBA_BELEMA	18, 24, 25, 29, 55
6	OSO_BRT_GTS4	67, 68, 70
7	OBIGBO_OKOLOMA_BODO_IMO RIVER_AFAM	11, 17, 22, 915
8	ASSA NORTH HUB	16, 20, 21, 53
9	AMENAM_KPOHO	52, 71, 72, 99, 100, 102, 119, 141
10	EAP_QIT_UQUO_QUA IBO_(UTAPATE) HUB	13, 114, 276
11	SAPELE_OBEN_(ODIDI) HUB	4, 38, 41, 42
12	OVADE_OZIENGBE_OGHAREKI_EFE	96, 98, 111, 142, 147, 148, 152
13	BONGA HUB	118
14	AKPO_EGINA HUB	130, 135
15	AMESHI_ANIEZE_OKWUIBOME_IZOMBE_(OML 26) HUB	26, 124, 143
16a	ANYALA__FUNIWA_OFRIMA_MADU HUB	83, 85, 86, 88,
16b	ANTAN_UDELE HUB	123, 126, 137, 233
17	IMA_TUBU_BONNY HUB	59, 112, 117, 111
18	ZABAZABA_AGBAMI_NWA DORO HUB	127 128, 135 245
19	H-BLOCK HUB	74, 77, 144
20	ERHA_BOSI HUB	125, 133
21	YOHO_HUB	104
22	USAN HUB	138, 139
23	NSIKO_UGE HUB	140, 145

Flare, Fuel, and Reinjection Performance

To complete the review of the gas sector, the analysis also examines how much produced gas is currently lost to flaring, fuel use, and reinjection, highlighting inefficiencies that directly affect long-term supply availability.

The analysis of NEPL and NUIMS flare, fuel-use, and reinjection volumes shows rising reinjection driven by increased production in OML 13 and fluctuating flare volumes linked to facility downtime. Between 60 and 70 percent of reinjection volumes are held for storage without enhancing oil recovery, indicating a major opportunity to redirect these molecules into commercial markets through improved gathering, compression, and processing systems. (Exhibit 40)

Exhibit 40 : Gas Volumes re-injection Analysis



Key Messages:

- **Flare Gas Volume:** Increase in flare volume due to increase in production.
- **Fuel Gas volume:** Fuel gas volumes have been relatively constant in absolute numbers over the three years
- **Re-injected Gas Volume:** Increase in re-injection for NEPL due to increase in production in OML 13. For NUIMS, Volumes decreased in 2024 due to reduced gas production from SEPNU(frequent facility downtime)

Note: *Further qualitative work on gas re-injection analysis to be conducted
*Between 60-70% volume are re-injection for storage, no value addition in terms of enhance oil recovery (e.g SEPNU & STARDEEP)

List of Exhibits

List of Exhibits Contd.

List of Acronyms

AAGP –	African Atlantic Gas Pipeline
AG –	Associated Gas
AGPC –	Assa North–Ohaji South Gas Processing Company
AKK –	Ajaokuta–Kaduna–Kano Pipeline
AMNI –	Amni International Petroleum Development Company
ANOH –	Assa North–Ohaji South
BVS –	Block Valve Station
BUA –	BUA Group
BCF/D –	Billion Cubic Feet per Day
B-NAG –	Bonny Non-Associated Gas Line
BRT –	Bonny River Terminal
BSCF/D –	Billion Standard Cubic Feet per Day
CCGP –	Cawthorne Channel Gas Plant
FLNG –	Floating LNG
CNG –	Compressed Natural Gas
CPF –	Central Processing Facility
CSS –	Commercial Strategy & Support
CNL –	Chevron Nigeria Limited
DGDO –	Domestic Gas Delivery Obligation
DGSO / DSO –	Domestic Gas Supply Obligation
DoG –	Decade of Gas Initiative
DD –	Due Diligence
EAP –	East Area Project
EGBIN –	Egbin Power Plant
EGGS –	Eastern Gas Gathering System
ELPS –	Escravos–Lagos Pipeline System
EOWEP / EOP –	Escravos–Odidi–Warri Expansion Pipeline
ESG –	Environmental, Social and Governance
ETP –	Energy Transition Plan
EVP GPNE –	Executive Vice President Gas, Power & New Energy
EWOGGS –	Escravos–Warri–Ogahara Gas Gathering System
FCI / FID –	Final Commercial Investment / Final Investment Decision
FEED –	Front-End Engineering Design
FG –	First Gas
FGN –	Federal Government of Nigeria
FPSO –	Floating Production, Storage & Offloading
GACN –	Gas Aggregation Company of Nigeria
GIPP –	Gwagwalada Independent Power Plant
GMP –	Gas Master Plan
GPP –	Gas Processing Plant
GSA –	Gas Sales Agreement
GSPAs –	Gas Sale and Purchase Agreements
GTAs –	Gas Transportation Agreements
GTS-1/2/3/4/5 –	Gas Transmission Systems 1–5
GBIs –	Gas-Based Industries
GCEO –	Group Chief Executive Officer
IAT –	Implementation Assurance Team
HI –	Hydrocarbon Initiatives
IPP –	Independent Power Plant
IPPG –	Independent Petroleum Producers Group
IOCs –	International Oil Companies
IPS –	Intermediate Pigging Station

List of Acronyms Cont'd

LCNG –	Liquefied Compressed Natural Gas
LNG –	Liquefied Natural Gas
LPG –	Liquefied Petroleum Gas
MDGIF –	Midstream & Downstream Gas Infrastructure Fund
MMBtu –	Million British Thermal Units
MMscf/d –	Million Standard Cubic Feet per Day
MYTO –	Multi-Year Tariff Order
NAG –	Non-Associated Gas
NDR –	Nigeria Data Repository
NEPL –	Nigerian Exploration & Production Limited
NGIC –	Nigerian Gas Infrastructure Company
NGML –	NNPC Gas Marketing Limited
NGMP –	Nigeria Gas Master Plan (2008)
NLNG –	Nigeria LNG Limited
NNPC Ltd –	Nigerian National Petroleum Company Limited
NOPL –	Nigerian Oil Pipeline License
NUPRC –	Nigerian Upstream Petroleum Regulatory Commission
NUIMS –	NNPC Upstream Investment Management Services
OB3 –	Obiafu–Obrikom–Oben Pipeline
OB/OB –	Obiafu/Obrikom Gas Plant
OKLNG –	Olokola LNG
OML –	Oil Mining Lease
OPTS –	Oil Producers Trade Section
OWEP –	Odidi–Warri Expansion Pipeline
PIA –	Petroleum Industry Act (2021)
PPP –	Public-Private Partnership
PPE –	Plant, Property & Equipment
QIT –	Qua Iboe Terminal
SPFA –	Special Purpose Financing Arrangement
TCF/ TSCF –	Trillion Cubic Feet/ Trillion Standard Cubic Feet
TNGP –	Trans-Nigeria Gas Pipeline
TSGP –	Trans-Sahara Gas Pipeline
UTM FLNG –	UTM Floating LNG Project
VTT LNG –	VTT Marine LNG
WAGP –	West African Gas Pipeline
YTD –	Year-to-Date

Intentionally left blank


NNPC
Energy for today
Energy for tomorrow