

East Africa Oil and Gas Market - Growth, Trends and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 110 pages | Mordor Intelligence

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Report description:

The East African Oil and Gas Market is expected to register a CAGR of over 3% during the forecast period.

COVID-19 negatively impacted the market in 2020. Presently the market is likely to reach pre-pandemic levels.

Key Highlights

Over the medium term, increasing consumption and the rising production of oil and natural gas in the region are expected to drive the market's growth.

On the other hand, political instability, due to civil war, in countries of East Africa, like South Sudan and Somalia, is expected to hamper the East Africa Oil and Gas Market growth during the forecast period.

Nevertheless, oil and gas companies are expected to invest in the exploration and production of East Africa's oil and gas fields, likely to create lucrative growth opportunities for the East African oil and gas market in the forecast period.

South Sudan is expected to witness significant growth and is likely to witness a substantial CAGR during the forecast period. This growth is attributed to the rapid increase in the region's exploration and production of offshore gas fields.

East Africa Oil & Gas Market Trends

Midstream Sector to Witness Significant Growth

East Africa's midstream oil and gas industry is an essential sector in East Africa's economy since most of the region's imports and export earnings are spent on petroleum products. The increasing demand for oil and the rising purchasing power of the citizens in the region has been boosting the growth of the market studied.

South Sudan was the leading oil producer in East Africa as of 2021. Oil production amounted to roughly 7.5 million metric tons in

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the country.

In 2021, the midstream sector became a pivotal sector for the East African countries, with the discovery of gas fields in the region and the governmental push towards reducing imports.

In April 2022, Sasol Ltd. announced plans to construct a gas pipeline and import natural gas via the proposed African Renaissance Pipeline (ARP) from the Rovuma Basin, opting for tanker deliveries of Liquefied Natural Gas (LNG) to best tap into Mozambique's offshore gas reserves.

In October 2022, the presidents of Tanzania and Kenya agreed to fast-track the construction of a natural gas pipeline designed to increase trade and lower energy costs for both countries. The projected natural gas pipeline would run 600 kilometers between Dar es Salaam and Mombasa.

In November 2022, the African, Caribbean, Pacific - European Union (ACP-EU) Joint Parliamentary Assembly overturned an earlier decision and voted to allow Uganda to develop the East African Crude Pipeline (EACOP) project. The 1,443-kilometer-long pipeline runs from Uganda's Western Region oil wells to Tanzania's seaport of Tanga.

Hence, the midstream sector is expected to witness significant growth due to the increase in oil consumption in the region and increased investment in the sector.

South Sudan to Witness Significant Growth

South Sudan increased its oil production from 6.8 million tonnes in 2016 to 7.5 million tonnes. Increased production is expected to generate growth in the South Sudan oil and gas market during the forecast period.

In January 2021, the Ministry of petroleum in South Sudan informed that oil production in Unity state's Tharjiath oilfield had resumed after nearly eight years of shutdown following the outbreak of civil war in the country in 2013. Tharjiath, also known as Block 5A in southern Unity state, is operated by the Sudd Petroleum Operating Company (SPOC).

As of October 2022, South Sudan's oil reserves are estimated at 3.5 billion barrels, the third-largest sub-Saharan African reserves after Nigeria and Angola. According to the Ministry of Petroleum, nearly 90% of South Sudan's oil and gas reserves remain untapped.

Furthermore, South Sudan launched its first-ever licensing round in 2021, offering five exploration licenses, through which the government hopes to attract a diverse group of foreign investors to stimulate upstream investment and increase its crude oil production.

South Sudan's oil and gas industry is expected to grow significantly in the forecast period due to increased gas production and increasing investment in the country, especially in the midstream sector.

East Africa Oil & Gas Market Competitor Analysis

The East African Oil and Gas Market is consolidated in nature. Some of the major players in the market (not in particular order) include Sudan National Petroleum Corporation, China National Petroleum Corporation, Shell PLC, Equinor ASA, and Tullow Oil PLC.

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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