O ECONÓMICO (MOÇAMBIQUE) · SOUTH AFRICA · LNG

# Sasol Pande-Temane reserves drop 25.6% in one year

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Sasol's proved gas reserves at the Pande and Temane concession in Mozambique fell 25.6% in a single year, dropping from 440.6 billion cubic feet (Bcf) to 327.9 Bcf between June 2025 and June 2026, according to an official company report. The decline intensifies supply risk for downstream consumers and raises structural questions about the long-term viability of Mozambique's onshore southern gas corridor beyond 2030.

Sasol confirmed that production decline at the Pande and Temane Production Sharing Agreement concession began in 2024. The company acknowledged in its report that new investments may only temporarily mitigate the reduction in supply, stopping short of presenting a credible long-term remedy for the reserve depletion trajectory. The pace of decline — more than a quarter of proved reserves within twelve months — signals that the fields are moving into a mature production phase that conventional well interventions are unlikely to reverse at scale.

Two alternatives are identified in the report as potential continuity options. The Inhassoro gas field, located in the same southern Mozambique basin, is cited as a near-term supplemental source. The proposed Matola LNG terminal, situated near Maputo, is identified as a longer-range infrastructure solution that could provide access to imported or regionally sourced gas to compensate for declining domestic output. Neither alternative is presented with a final investment decision, timeline, or confirmed capacity in the report.

The reserve reduction carries significant implications for Mozambique's domestic energy supply and for South Africa, where Sasol's Mozambican gas feeds the Rompco pipeline and underpins industrial and power generation demand in Gauteng and beyond. Any shortfall in supply from Pande and Temane would require either accelerated domestic alternatives, increased LNG imports through a terminal such as Matola, or demand-side adjustments among industrial gas consumers in both countries.

The Matola LNG terminal concept, if progressed to FID and construction, would represent a material infrastructure investment requiring marine, storage, and regasification components. Inhassoro development, depending on scope, could involve additional well drilling, gas gathering, and tie-in engineering. At this stage, both remain prospective options without confirmed procurement processes.

## Why this matters to partners and clients of Saga

Both the Matola LNG terminal and Inhassoro field development are pre-FID at this stage, so the appropriate posture is monitoring and early relationship-building rather than procurement outreach. Norwegian service companies with LNG terminal engineering, subsea well intervention, or gas gathering expertise should track Sasol's investment announcements closely, as a final development decision on either option would open procurement opportunities across multiple service segments. Engaging with Sasol's Mozambique upstream and infrastructure teams now to establish technical credibility ahead of any formal tender process is the recommended near-term action.

### PARTNER ANGLES

- **LNG:** Monitor Matola LNG terminal progress closely — if progressed to FID, the project would require regasification, storage, and marine loading engineering where Norwegian LNG specialists are competitive.
- **Drilling:** Inhassoro field development, once sanctioned, is likely to require new production wells and workover campaigns; Norwegian drilling contractors should track Sasol's well programme announcements.

- **Subsea/FPSO:** If Inhassoro development involves offshore or near-shore components, subsea tie-back and pipeline engineering capabilities become relevant — scope to be confirmed as project definition advances.
- **Pipeline:** Replacement gas supply to the Rompco corridor may require new gathering or transmission pipeline capacity; Norwegian pipeline engineering firms should monitor infrastructure scoping studies.
- **Service:** Mature field decline at Pande and Temane may create near-term demand for well integrity, production optimisation, and reservoir management services to extend productive life ahead of replacement supply coming online.

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