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Nigeria crude sales gap: 70m barrels unlifted in 8 months

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Nigerian crude producers offered 182 million barrels to domestic refiners over an eight-month period but only 112 million barrels were actually transacted, leaving a gap of 70 million barrels unlifted, according to data from the Nigerian Upstream Petroleum Regulatory Commission (NUPRC). The shortfall points to persistent structural friction between upstream supply and domestic refining capacity, even as Nigeria pushes to redirect crude away from export markets and toward in-country processing.

The NUPRC figures highlight the scale of the challenge facing Nigeria's domestic refining ambitions. While the crude-for-refining policy framework obligates producers to offer a defined share of output to local refiners, translating those offers into completed liftings has proven difficult. Factors typically undermining off-take include financing constraints on the refinery side, logistical bottlenecks, pricing disagreements, and the intermittent operational status of refining facilities. The 38 percent gap between volumes offered and volumes transacted suggests these frictions remain unresolved at significant scale.

The period in question coincides with ongoing efforts to ramp up the Dangote Refinery in Lagos — Nigeria's flagship 650,000-barrel-per-day nameplate-capacity facility — alongside the government's rehabilitation programme for the Port Harcourt, Warri, and Kaduna refineries run by the Nigerian National Petroleum Company Limited (NNPCL). If domestic offtake capacity continues to lag supply offers, crude originally earmarked for local processing may flow back into the export

stream, undermining the policy objective of reducing Nigeria's dependence on imported refined products.

For the upstream sector, the unlifted volumes create commercial uncertainty for producers who must plan liftings, shipping schedules, and revenue forecasts against an offtake base that has proven unreliable. Regulatory pressure from the NUPRC to fulfil domestic supply obligations while managing export commitments adds a further layer of operational complexity. The data also raises questions about whether Nigeria's refining infrastructure — even with new and rehabilitated capacity coming online — is yet able to absorb the volumes the upstream sector is capable of delivering on a sustained basis.

The supply-demand mismatch in Nigeria's domestic crude market is likely to remain a live policy issue through 2025 and beyond, as the government attempts to balance upstream producer interests, refinery ramp-up timelines, and the broader goal of achieving fuel self-sufficiency. NUPRC's publication of the 8-month data signals that the regulator is maintaining close oversight of compliance with domestic supply obligations, and further reporting or enforcement action may follow if the transactional gap persists.

Why this matters to partners and clients of Saga

This story reflects infrastructure and commercial readiness gaps in Nigeria's domestic refining build-out rather than a near-term procurement opportunity. Norwegian service companies with exposure to refinery-linked marine logistics, floating storage, or crude transfer infrastructure should monitor developments as Dangote and the NNPC-operated refineries ramp capacity, since sustained offtake growth will eventually drive terminal, jetty, and marine services demand. No procurement outreach is warranted at this stage; the appropriate action is relationship-building with NNPC, Dangote Petroleum Refinery, and NUPRC-registered operators ahead of future tendering.

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- **FPSO/Floating Storage:** Persistent offtake gaps may create demand for floating storage solutions to buffer crude between upstream liftings and refinery readiness windows.
- **Pipeline:** Reliable onshore and offshore crude transfer infrastructure is a prerequisite for closing the lift gap; pipeline integrity and flow assurance services will be needed as domestic throughput scales.
- **Subsea:** Subsea tie-back and export riser systems supporting fields with domestic supply obligations may require re-optimisation as lifting schedules shift between export and domestic streams.
- **Service:** Metering, custody transfer, and regulatory compliance services are in demand as NUPRC tightens oversight of domestic crude obligation reporting and enforcement.

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