KNLF ENERGY MAPS · NO. 1

Africa's Gas Grid: A Continent Barely Connected

Africa sends much of its gas abroad by ship and subsea pipe, while around one billion people still lack access to clean cooking.

Closing that gap is a question of law.



Algeria → Morocco
The GME transit line went idle after Algeria declined to renew the contract in 2021. Transit rested on a commercial contract; one side let it lapse.

Egypt
Built to export LNG, now a record LNG importer (2025). Diverting export gas home led to arbitration (Unión Fenosa Gas v. Egypt).

Nigeria
~46% of produced gas exported in Feb 2026; power plants ran short. PIA s.110 sets a domestic delivery duty.

Cross-border, operating · Under construction · Proposed · Idle (Algeria leg) · LNG export · Exporter now importing · Building

~1 billion

Africans lack access to clean cooking (IEA, 2025)

Over ⅓

of Africa's gas output exported (~115 of 265 bcm; Energy Institute, 2024)

480,000 km

of U.S. gas transmission lines; the U.S. is ⅓ Africa's size

KN LF
Georges C. Nama, Esq. · Managing Partner
Kachikwu & Nama Law Firm · The Woodlands, Texas · kn-laws.com

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Behind the Map

Nine cross-border gas lines, Africa's LNG export sites, and what the law can do.

CROSS-BORDER GAS LINES

1. **Maghreb–Europe (GME)** — Algeria → Morocco → Spain · ~1,620 km
   Idle. Algeria declined to renew the transit contract (Oct 2021); Spain → Morocco reverse flow since 2022.
2. **Medgaz** — Algeria → Spain · 210 km subsea
   Operating.
3. **Transmed** — Algeria → Tunisia → Italy · ~2,475 km
   Operating.
4. **Greenstream** — Libya → Italy · 520 km subsea
   Operating · reduced volumes.
5. **EMG & Arab Gas Pipeline** — Israel, Jordan, Egypt
   Operating · flows now mainly Israel → Egypt (reversed since 2020); periodic security halts.
6. **West African Gas Pipeline** — Nigeria → Benin → Togo → Ghana · 678 km
   Operating · supply often below capacity.
7. **ROMPCO** — Mozambique → South Africa · 865 km
   Operating.
8. **Trans-Saharan (TSGP)** — Nigeria → Niger → Algeria · 4,128 km
   Nigeria (AKK) nearing completion · Algeria building since June 2026 · Niger expected early 2027.
9. **Nigeria–Morocco (AAGP)** — Atlantic coastal route, 13 countries · ~6,000 km
   Proposed · ECOWAS heads of state signed the agreement, July 2026 · no final investment decision yet.

LNG EXPORT POINTS

Operating: Arzew & Skikda (Algeria) · Bonny Island (Nigeria) · Bioko (Equatorial Guinea) · Soyo (Angola) · Congo LNG (Tango & Nguya FLNGs) · GTA (Senegal–Mauritania) · Coral Sul (Mozambique). **Egypt** (Idku, Damietta): built for export, a record LNG importer in 2025. **Gabon** (Cap Lopez LNG): under construction, start-up delayed to 2027 or later. **Cameroon** (Kribi): Hilli FLNG left in August 2026, exports paused.

WHAT THE LAW CAN DO

1. **Domestic supply obligations that bite.**
   Nigeria's PIA (s.110) lets the regulator set domestic delivery obligations; shortfalls cost US$3.50 per MMBtu under s.110(8), subject to statutory exceptions. Pricing must make delivery pay.
2. **Reserve gas for home before the LNG deal is signed.**
   Long-term export contracts lock in volumes. After the investment decision, carving out gas is costly and risks arbitration, so reservation is best written into the PSC up front.
3. **Open access and transit rules across borders.**
   Third-party access, tariffs and transit guarantees decide whether a pipeline serves a region or a single buyer. The 2003 WAGP Treaty and its regulator (WAGPA) offer a template.

Sources: IEA (clean cooking, 2025); Energy Institute Statistical Review 2024 and Control Risks via Atlantic Council (output ~265 bcm, exports ~115 bcm, estimate); NUPRC data via THISDAY (Nigeria, Jan–Feb 2026); S&P Global (Egypt LNG, 2025); PHMSA (U.S. transmission mileage, 2025); NUPRC Domestic Gas Delivery Obligation Regulations 2022; operator and press reports (Oct 2026). Routes are schematic. General information only; not legal advice.

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Kachikwu & Nama Law Firm · The Woodlands, Texas · kn-laws.com

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