



UNITED REPUBLIC OF TANZANIA
MINISTRY OF ENERGY
ENERGY AND WATER UTILITIES
REGULATORY AUTHORITY
(EWURA)



**NATURAL GAS
SUB-SECTOR
REGULATORY
PERFORMANCE
REPORT FOR
THE YEAR ENDED
30TH JUNE 2025**





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CHAIRMAN'S STATEMENT

In Tanzania, the natural gas sub-sector plays a crucial role in accelerating socio-economic development and attaining energy resilience. It is a distinct honour to present the Mid and Downstream Natural Gas Sub-Sector Performance Report for the Fiscal Year ending on 30th June 2025. During the period, EWURA continued to rigorously execute its mandate enshrined in the EWURA Act, Cap. 414 and the Petroleum Act, Cap. 392. Our primary priorities continue to be fostering competition, creating an enabling environment to attract additional investment, and promoting the operational efficiency of the regulated entities.

During the review period, substantial advancements were observed in Compressed Natural Gas (CNG) filling stations, alongside a notable shift in the energy mix due to the commissioning of the Julius Nyerere Hydro-Power Project, which reduced reliance on natural gas for power generation. This increases natural gas availability for industrial, transportation, commercial, and residential applications. However, challenges remain, particularly the insufficient natural gas distribution network, which limits access outside the Dar es Salaam, Pwani, Lindi, and Mtwara regions. The Authority collaborates with government institutions to create conditions that attract private capital for pipeline projects, addressing these limitations.

Looking to the Future, EWURA is fully aligned with the National Clean Cooking Strategy to achieve the ambitious goal of having 80% of the population use clean cooking solutions by 2034. This involves promoting clean energy and reviewing regulations to facilitate the necessary private-sector investments. Our regulatory efforts are also deeply aligned with SDG 7 (Clean Energy) and SDG 13 (Climate Action) by displacing traditional fuels, underscoring our commitment to ESG considerations.

We would like to express our deep gratitude to Her Excellency, the President of the United Republic of Tanzania, Dr Samia Suluhu Hassan, for her strong vision and leadership in improving the investment climate in Tanzania. I equally convey my gratitude to the Ministry of Energy for its support and provision of overall policy oversight of the sub-sector. Last but not least, I applaud the Board, Management, and Staff for their unwavering commitment to delivering on the Authority's mandates. The Board remains committed to its resolve to convert challenges into the transformative energy opportunities of tomorrow.



Prof. Mark J. Mwandosya
BOARD CHAIRMAN



FOREWORD

The Authority is required under Sections 31(2) and 7(1)(f) of Caps. 392 and 414 to provide information regarding the mid/downstream natural gas subsector's regulatory performance. In compliance with these sections, we are pleased to present the Natural Gas Sub-Sector Regulatory Performance Report for FY 2024/25. The report highlights significant infrastructure and market growth, including a 128% rise in CNG vehicles and motorcycles, reaching a total of 15,954, alongside a 98% increase in CNG consumption. The Authority issued 28 construction approvals and 7 operational licenses for new facilities. Regulatory oversight improved, with a 97% compliance rate across 48 inspections (up from 94.05%), and Local Content grew by 15%, adding 318 companies to the LSSP database.

Despite these successes, annual natural gas consumption decreased by 23%, from 82,025.03 million standard cubic feet (MMscf) to 63,301.35 MMscf. These declines resulted from a significant shift in consumption: the share of power generation fell by 11.30 percentage points (to 74.11% from 85.41%), while the shares of industries and CNG for automobiles increased by 10.83 and 0.46 percentage points, respectively. Consequently, natural gas's share in the country's electricity mix dropped from 67.1% to 34.68%. The sub-sector is also constrained by inadequate distribution networks and limited production capacity, exacerbated by lower gas-well output and declining reservoir pressure in Songo Songo. Nevertheless, the increase in hydropower generation and the Songas shutdown present an opportunity to diversify the market by expanding gas use for industrial, CNG, and household applications.

Tanzania's future strategy aims to enhance gas supply by advancing the Ntorya Gas Field development, expected to commence in early 2026, thereby significantly increasing capacity. Infrastructure growth will focus on pipeline extensions to key regions and Mini-LNG solutions for inland areas, with a long-term goal of launching large-scale LNG export projects and positioning Tanzania as a regional energy hub.

We express sincere gratitude to the EWURA Board and the Government, through the Ministry of Energy, for their steadfast guidance, which is essential in maintaining the sub-sector's ongoing contribution to the nation's economic prosperity.



Dr. James A. Mwainyekule
DIRECTOR GENERAL



ABBREVIATIONS AND ACRONYMS

BVS	Block Valve Station
CNG	Compressed Natural Gas
CNG-V	Compressed Natural Gas Vehicles
CO ₂	Carbon Dioxide
CRB	Contractors Registration Board
EACOP	East African Crude Oil Pipeline
EWURA	Energy and Water Utilities Regulatory Authority
FY	Financial Year
GASCO	Gas Company (Tanzania) Limited
HFO	Heavy Fuel Oil
HSE	Health, Safety, and Environment
JNHPP	Julius Nyerere Hydropower Project
LOIS	License and Order Information System
LSSP	Local Suppliers and Service Providers
LNG	Liquefied Natural Gas
LTI	Lost Time Injuries
MLV	Main Line Valve
MMBtu	Million British Thermal Units
MMscf	Million Standard Cubic Feet
MMscfd	Million Standard Cubic Feet per Day
M&P	Maurel & Prom Exploration Production (T) LTD
MW	Megawatt
NPGIS	National Petroleum and Gas Information System
O&M	Operations and Maintenance
PAET	Pan African Energy Tanzania Limited
PPA	Power Purchase Agreement
PRS	Pressure Reduction Station
PSV	Pressure Safety Valve
TANESCO	Tanzania Electric Supply Company Limited
TBS	Tanzania Bureau of Standards
TPDC	Tanzania Petroleum Development Corporation
UNESCO	United Nations Educational, Scientific, and Cultural Organization
VAT	Value Added Tax



EXECUTIVE SUMMARY

The Energy and Water Utilities Regulatory Authority (EWURA) is pleased to present the FY2024/25 annual performance report for the natural gas sector in Tanzania Mainland, the sixth edition in the series. This document fulfils requirements under the Petroleum Act, Cap. 392 and the EWURA Act, Cap. 414, providing a detailed assessment of technical, safety, and economic performance within the midstream and downstream natural gas sectors. The scope of the report covers all activities related to the processing, transmission, distribution, and supply of natural gas throughout mainland Tanzania.

28
CONSTRUCTION
APPROVALS ISSUED

7
OPERATION LICENSES
ISSUED

During the FY 2023/24, the Authority issued 28 construction approvals and seven (7) operation licenses in the sub-sectors compared to 9 Construction Approvals and 3 licenses granted in the previous year. The granted approvals and licenses are for natural gas supply facilities and CNG Filling Stations, primarily located in the Dar es Salaam and Pwani regions.

61,514.18
Processed Natural Gas
(MMscf)

During the period under review, the natural gas processing plants consistently met their operational targets, benefiting from well-executed maintenance programs and compliance monitoring, which delivered a minimum availability of 97.8% at Songas Plant. The average variance of daily nominations compliance ranged from 59% to 100%, Songas plant being the least.

63,301.35
Consumed Natural Gas
(MMscf)

The quantity of processed natural gas decreased by 25.81% from 82,912.62 MMscf in the previous financial year to 61,514.18 MMscf, mainly due to a decrease in the consumption of natural gas for power generation. This results in an average daily natural gas production of 171.64 MMscfd in FY 2024/25, a 24.2% decrease from 226.46 MMscfd in the previous financial year. The overall capacity utilisation for natural gas processing plants remains low, with Songas Plant at 43.4%, while TPDC Madimba, M&P, and TPDC Songo Songo at 43.4%, 27.2%, and 15.5%, respectively.

In FY 2024/25, natural gas consumption declined by 23% from 82,025.03 MMscf recorded in the previous year to 63,301.35 MMscf. Consumers remain power generation plants, industries, CNG vehicles, commercial, institutions, and households.

12,297.48
Produced CNG (MT)

11,190.14 MT
Consumed by CNG-V

1,607 MT
Consumed by the
Industries & Hotels

No new investments were made in transmission pipelines, apart from the Chalinze pipeline extension project, which is currently in the planning stage. Meanwhile, the natural gas distribution network experienced steady growth through the addition of low-pressure and virtual pipelines. As of 30 June 2025, the distribution pipelines totalled 186.177 km, and there were four (4) CNG Receiving Terminals for supplying natural gas via a virtual pipeline.



15,954
**Number of CNG Vehicles
and three-wheeler
motorcycles**

vehicles from 7,000 to 15,954 in FY 2023/24 contributed to the boost in production and consumption.

2,450
**Registered Local
Companies in the LSSP
Database**

The production of Compressed Natural Gas (CNG) reached 12,297,477.69 kilograms in FY 2024/25, marking a 69% increase compared to 7,268,161.87 kg produced in FY 2023/24. Vehicle consumption of CNG nearly doubled, rising by 98% to 11,190,140.24 kg from 5,662,448.20 kg in FY 2023/24. This volume alone accounted for 87% of the total CNG produced. Industries and hotels consumed 1,399,435.35 kg and 207,902.08 kg, respectively. The increasing number of CNG stations, the rise in industries using natural gas, and the substantial increase in CNG vehicles from 7,000 to 15,954 in FY 2023/24 contributed to the boost in production and consumption.

The Authority continued to monitor compliance with local content requirements as provided in the Petroleum (Local Content) Regulations, 2017, GN 197, including oversight of the LSSP Database. During the FY 2024/25, 318 new companies were registered in the LSSP database. As of 30th June 2025, the total number of local companies registered with the LSSP had risen to 2,450, representing a 15% increase from the 2,132 recorded in FY 2023/24.

During the period under review, the regulated entities' (PAET, TPDC, M&P, and Songas) revenue generation increased by 21% compared to an 8% increase in the previous Financial Year. On the other hand, overall costs increased by 21%, while natural gas processing costs rose by 15%, distribution costs by 16%, and transmission costs by 37%.

Further, all utilities recorded a current ratio of 1 or higher, indicating they were in a good position to meet matured short-term obligations. However, accounts receivable (debtors) that were more than 90 days past due were substantial for PAET and TPDC. The lowest was 0%, recorded by M&P, while the highest was 84%, recorded by PAET. Furthermore, the highest collection efficiency was 94% recorded by M&P, and the lowest was 83% recorded by Songas.

During the period under review, the mid- and downstream natural gas sub-sector faced challenges, including inadequate investment in distribution projects to meet natural gas demand and future market needs, a shortage of CNG facilities, and a natural gas supply deficit to meet peak demand requirements. Despite the aforementioned challenges, operators in the mid- and downstream natural gas subsector maintained standards and complied with regulatory requirements. The Authority will continue to improve its regulatory tools to attract private investment in the mid- and downstream natural gas subsector.



1. INTRODUCTION

The Natural Gas Regulatory Performance Report for Financial Year 2024/25 is the 6th Edition, counting from the first publication of the FY2019/20 report. The preparation of these reports fulfills requirements under Section 31(2) and 7(1)(f) of the Petroleum Act, Cap. 392 and the Energy and Water Utilities Regulatory Authority Act, Cap. 414 (commonly referred to as the EWURA Act), respectively. According to the above Sections of the Acts, the Authority is obligated to disseminate information, including submission of an annual regulatory performance report, to the Minister responsible for Energy matters.

As provided in Section 29 of the Petroleum Act, Cap. 392, EWURA is responsible for regulating mid- and downstream natural gas activities, including processing, transmission, storage, and distribution of natural gas in mainland Tanzania. As conferred under the Acts, EWURA performs technical, economic, and safety regulatory functions, encompassing the following:

- (a) to issue, renew, suspend, or cancel construction approvals and operational licences, as well as to ensure compliance and effective asset integrity management by operators;
- (b) to monitor and protect consumers' interests concerning natural gas prices, availability, quality, reliability, and supply continuity without compromising the interests of service providers and the Government;
- (c) to promote fair competition, transparency, efficient use of natural gas, the use of local goods and services produced and provided in Tanzania, and the participation of Tanzanians in natural gas activities;
- (d) to protect the public from dangers arising from processing, transmission, storage, conveyance, shipping, supply, or use of natural gas, as well as to initiate and conduct investigations into technical, health, and safety issues in the natural gas industry working environment, including incidents that cause damage to infrastructure, injury, or loss of life
- (e) to advise the Government on all matters related to the importation, exportation, processing, storage, transportation, conveyance, shipping, supply, or utilisation of natural gas.

1.1. Scope of the Report

This report presents an overall performance of the mid and downstream natural gas subsector for the period from 1st July 2024 to 30th June 2025, which is FY 2024/25. The report encompasses technical, safety, and financial information, capturing the Authority's core regulatory functions in the Mid and Downstream natural gas sub-sector. It provides findings from compliance monitoring inspections, analyses, and evaluations of key performance metrics in natural gas processing, transmission, and distribution.

1.2. Content of the Report

The content of this report outlines the current state of the sub-sector, overall regulatory performance, and achievements achieved during the implementation of mid- and downstream natural gas activities. The report presents highlights, analysis, and trends related to technical, safety, and economic performance that assess the quality of products and service delivery, as well as service availability, accessibility, and affordability of the natural gas supply. It includes production, consumption, and investment trends, along with the future outlook of the natural gas industry in the country.

The technical activities highlighted in the report focused on natural gas processing, transmission, and distribution. The distribution activities were divided into two categories: low-pressure distribution pipelines, referred to as piped gas, and virtual pipelines, which mainly include compressed natural gas (CNG) mother stations, CNG daughter stations, and offline CNG filling stations.

The financial performance evaluation targeted only the owners of processing facilities, transmission pipelines, and distribution networks, unlike technical compliance, which includes all players in the mid-



and downstream natural gas subsector. Therefore, financial evaluation and reporting covered the following regulated entities: -

- (i) Tanzania Petroleum Development Corporation (TPDC), in conjunction with its subsidiary company (GASCO), which is the National Oil Company and is engaged in mid and downstream natural gas activities, including processing, transportation, distribution, and aggregation of natural gas;
- (ii) Songas, which is involved in natural gas processing, transportation and electricity generation in Tanzania using natural gas from Songo Songo Island;
- (iii) PanAfrican Energy Tanzania Limited (PAET), which is engaged in the production, distribution, and marketing of natural gas produced from Songo Songo Island; and
- (iv) Maurel & Prom Exploration and Production Tanzania (M&P), which extracts, processes, and transports natural gas in the Mtwara Region.

Beyond presenting the overall regulatory performance for the FY2024/25, this report also highlights the regulatory impacts and achievements reached, examines the challenges encountered, and outlines a clear strategic path for long-term stability and sustained growth of the natural gas sub-sector.



2. REGULATORY TOOLS AND STANDARDS

One of the main duties of the Energy and Water Utilities Regulatory Authority (EWURA) is to ensure service providers follow all relevant laws, guidelines, codes, and standards. Under the Petroleum Act, Cap. 392, EWURA creates the necessary Rules and works closely with other related institutions to establish standards and guiding tools that ensure the entire petroleum (oil and gas) industry operates safely, efficiently, and in line with best practices.

In the FY 2024/25, EWURA prioritised the essential groundwork of benchmarking and literature review to develop a robust regulatory framework for the Mini-LNG sector, which is currently attracting the attention of many investors. This investigative phase was instrumental in ensuring that the developed regulatory tools, including standards, are conducive to the success of imminent infrastructure projects. Moving forward, the authority is set to engage the Tanzania Bureau of Standards (TBS) by submitting comprehensive proposals aimed at establishing new and specialised standards to govern the Mini-LNG sub-sector.

The list of existing and applicable regulatory tools in the natural gas sub-sector is shown in **Annex 1**, and **Annex 2** lists adopted and gazetted natural gas standards.



3. CONSTRUCTION APPROVALS AND LICENCES

3.1. Construction Approvals Issued

EWURA continued to facilitate investments in the natural gas sub-sectors. In the financial year 2024/25, the Authority granted a total of 28 construction approvals for natural gas infrastructure projects. This marks a significant increase from the nine (9) approvals issued in the previous financial year, 2023/24. Of the 28 approvals, nine (9) were for the construction of Compressed Natural Gas (CNG) filling stations in Dar es Salaam. Seventeen (17) approvals were granted for the construction of natural gas distribution supply pipelines in the Dar es Salaam and Pwani regions, while two (2) approvals were issued for natural gas receiving facilities in Pwani and Morogoro regions. The list of approved projects for FY 2024/25 is presented in **Annex 3**.

3.2. Licences Issued

In the financial year 2024/25, EWURA granted a total of seven (7) Natural gas operation licenses. Of these, four (4) licenses were issued for the operation of CNG filling stations, two (2) were designated for CNG supply, and one (1) license was allocated for natural gas distribution, as detailed in **Table 1**. The updated list of licenses is shown in **Annex 4**.

Table 1: Natural Gas License Issued.

S/N	Licensee	License Number	Date of Issue	Type of License
1.	Tanzania Petroleum Development Corporation - P. O. Box 2774, Dar es Salaam	NGDL-2025-001	27-Jun-2025	Distribution license for the distribution network in Dar es Salaam
2.	Tan Health Limited	CNGSL-2024-002	29-Nov-2024	CNG Supply License
3.	Tanzania States Natural Gas Holdings Company Limited	CNGSL-2024-001	30-May-2024	CNG Supply License
4.	Tembo Energies Limited	NGCL-2024-001	27- Sept-2024	Natural Gas Compression Licence at Tabata Dampo area
5.	Taqa Dalbit Tanzania Limited	NGCL-2025-001	28-Mar-2025	Natural Gas Compression Licence at Mlimani area
6.	Rafiki CNG Station and Conversion Centres Limited	NGCL-2025-002	28-Mar-2025	Natural Gas Compression Licence at Tabata Dampo area
7.	Tanzania Petroleum Development Corporation	NGCL-2025-003	28-Mar-2025	Natural Gas Compression Licence at Mlimani area

3.3. Complaints and Dispute Resolution

According to Section 7(1)(e) of the EWURA Act, Cap 414, the Energy and Water Utilities Regulatory Authority (EWURA) is responsible for resolving disputes and complaints involving suppliers, operators, and consumers of regulated goods and services. In the 2024/25 financial year, the Authority receivedve any registered complaints related to the natural gas sub-sector.



4. NATURAL GAS INFRASTRUCTURE PERFORMANCE

The existing natural gas infrastructure comprises processing, transmission, distribution, and supply. Throughout the Financial Year (FY) 2024/25, the Authority actively monitored the operational performance of this infrastructure. It ensured technical compliance by strictly adhering to established regulatory standards and best international petroleum industry practices.

This infrastructure comprises natural gas processing plants, transportation pipelines, distribution networks, Compressed Natural Gas (CNG) filling stations, CNG receiving stations, and CNG supply trailers.

The regulated entities whose compliance performance was monitored and assessed in the mid and downstream natural gas sub-sector are listed in **Annex 5**.

4.1. Natural Gas Processing Infrastructures

The current natural gas infrastructure includes four facilities: the TPDC Madimba plant and the M&P facility in Mtwara Region, as well as the TPDC Songo Songo plant and the Songas facility in Lindi Region. During the review period, the natural gas processing infrastructure remained unchanged, with no new plants being constructed.

4.1.1 Processing Plants Technical Performance

During the period under review, the Authority conducted a technical assessment of natural gas processing facilities to evaluate their capacity usage and operational efficiency. This analysis was based on key performance indicators, including installed capacity, the volume of natural gas processed compared to plant nominations, plant availability, plant utilisation, and integrity management. The evaluation was conducted using data submitted by the regulated entities.

4.1.1.1 Installed Capacity of Processing Plants

The combined capacity of four natural gas processing facilities is 470 million standard cubic feet per day (MMscfd) as follows: Madimba plant operated by TPDC has a capacity of 210 MMscfd, Songo Songo facility can process 140 MMscfd, Songas facility has a processing capacity of 110 MMscfd, and M&P processing has a capacity of 10 MMscfd. TPDC supplies 74.5% of the total capacity through its Madimba and Songo Songo plants, while Songas and M&P account for 23.4% and 2.1%, respectively. **Figure 1** displays the installed capacity of these four processing plants.

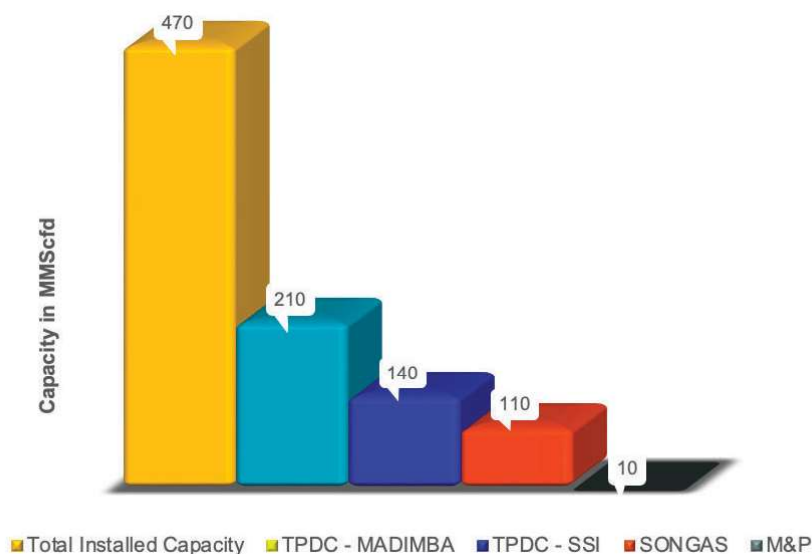


Figure 1: Processing Plants Capacity Contribution



4.1.1.2 Daily Natural Gas Processing Plants Nomination

The Authority evaluated the output of gas allocated to the four (4) natural gas processing facilities to ensure it aligned with the commercial agreements of the gas developers and met the gas needs of end users. Overall, all four processing facilities complied with the requirements and supplied natural gas to consumers as needed. However, the gas nomination from the Songas processing plant has decreased compared to the last financial year due to the shutdown of the Songas power plant. **Table 2** provides an overview of the daily gas nominations and variances by the gas processing plants during the 2024/25 financial year.

Table 2: Average Variance Nomination Compliance Recorded

Processing Plant	Nominated Natural Gas (MMscfd)	Utilised Capacity (MMscfd)	Percentage Nomination Variance
TPDC Madimba	95.65	91.06	95%
TPDC Songosongo	27.92	21.65	78%
Songas Ltd	94.50	56.21	59%
Maurel et Prom	2.72	2.72	100%

Source: TPDC, Songas/PAET and M&P

4.1.1.3 Natural Gas Processing Plants Availability

During the review period, the Authority continued to monitor the performance of the natural gas processing plants to ensure their operational availability. TPDC Madimba plant operated at 100% availability, while TPDC Songo Songo achieved 99.77%, Songas Plant reached 97.83%, and M&P plant recorded 99%. Overall, the annual availability of all plants remained above 97% due to the presence of standby units, and there were no significant maintenance activities that caused plant shutdowns. The average plant availability for each plant during the 2024/25 Financial Year is shown in **Table 3**.

Table 3: Annual Average Plant Availability of Existing Processing Plants

Processing Plant	Total Operation hours	Downtime hours	Average Plant Availability (%)
TPDC Madimba	8,760.00	0.00	100.00%
TPDC Songosongo	8,760.00	20.00	99.77%
Songas Ltd	8,760.00	189.77	97.83%
M&P	8,760.00	6.29	99.93%

Source: TPDC, Songas and M&P

4.1.1.4 Processing Plants Capacity Utilisation

The annual average capacity utilisation for the processing plants was analysed, and the results are presented in **Table 4**. The table illustrates the capacity utilisation comparison of TPDC Madimba, TPDC Songo Songo, Songas Ltd, and M&P natural gas processing plants for the fiscal years 2024/25, 2023/24 and 2022/23. The data presented in **Table 4** and **Figure 2** illustrates the annual trend in plant utilisation. There was a noticeable decline in natural gas capacity utilization during the 2024/25 financial year. This decrease was attributed to a reduction in natural gas consumption for power generation.

Table 4: Gas Processing Plants Capacity Utilisation

Plant Name	Available Capacity (MMscfd)	FY 2024/25		FY 2023/24		FY 2022/23	
		MMscfd	(%)	MMscfd	(%)	MMscfd	(%)
TPDC Madimba	210	91.06	43.4%	109.65	52.2%	89.69	42.7%
TPDC Songo Songo	140	21.65	15.5%	24.06	17.2%	36.17	25.8%
Songas Ltd	110	56.21	51.1%	95.02	86.4%	95.02	86.4%
Maurel & Prom (M&P)	10	2.72	27.2%	3.36	33.6%	3.36	33.6%

Source: TPDC, Songas and M&P



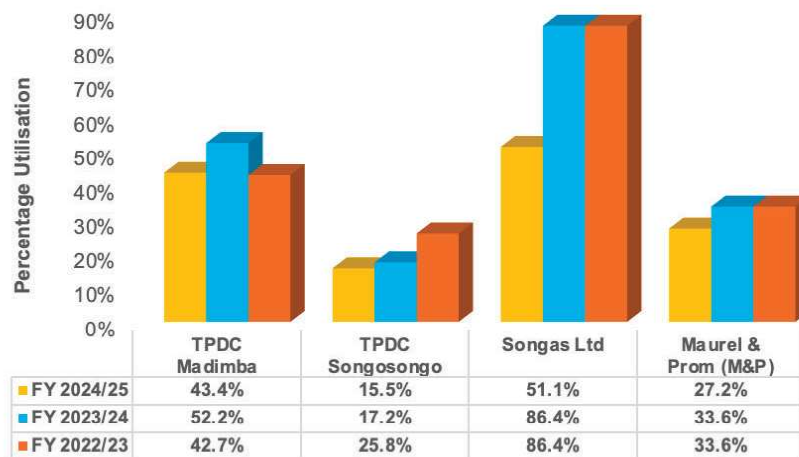


Figure 2: Gas Processing Plants Capacity Utilisation

(i) TPDC Madimba Gas Processing Plant Capacity Utilisation

The Madimba natural gas processing plant attained an average daily utilisation of 91.06 (MMscfd) in the FY 2024/25, which represents 43.4% of its total installed capacity. This marks an 8.8% decrease from the 52.2% utilization recorded in the 2023/24 financial year. The decline was primarily attributed to a reduction in natural gas consumption for power generation, following the completion of the Julius Nyerere Hydropower Project. **Figure 3** illustrates Average Monthly TPDC Madimba Gas Plant Utilisation Capacity.

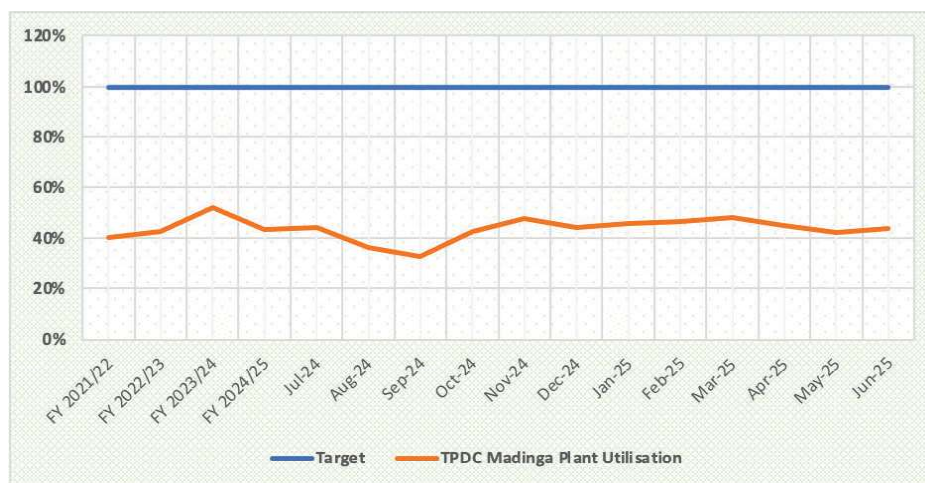


Figure 3. Average Monthly TPDC Madimba Gas Plant Capacity's Utilization

(ii) TPDC Songo Songo Gas Processing Plant Capacity Utilization

The Songo Songo natural gas processing plant operated at an average daily utilization of 21.65 MMscfd, which equates to 15.5% of its total capacity. Figure 4 represents a 1.7% decrease compared to the 2023/2024 Financial Year (24.06 MMscfd, or 17.1%) and a substantial 10.3% decrease from the 2022/2023 Financial Year (36.17 MMscfd). The highest average production was 26.79 MMscfd in January 2025, and the lowest was 19.99 MMscfd in December 2024. **Figure 4** illustrates the capacity utilization of the TPDC Songo Songo processing plant during the 2024/25 Financial Year.



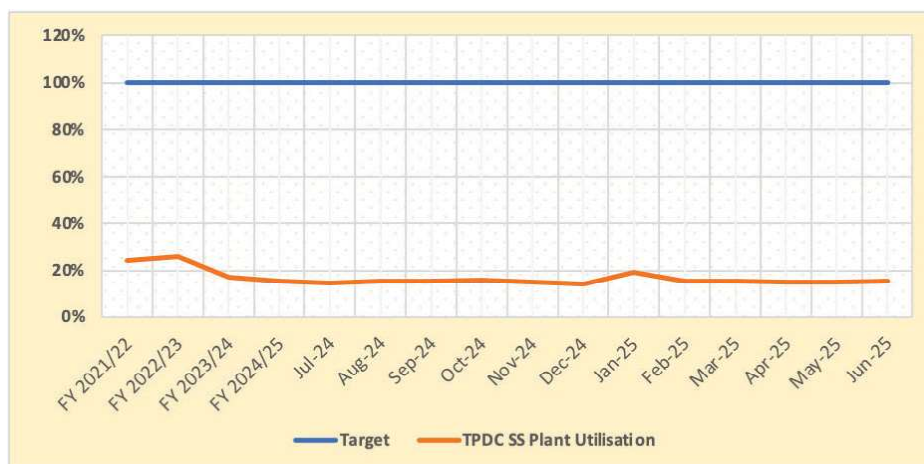


Figure 4: Monthly Average capacity utilisation of TPDC Songo Songo Plant.

(iii) Songas Gas Processing Plant Capacity Utilisation

The Songas gas processing plant achieved an average daily utilisation of 56.21 million standard cubic feet per day (MMscfd), which is 51.1% of its total capacity. This marks a significant decrease of 35.3% compared to the previous year's utilisation of 86.4%. The decline in utilisation is attributed to a reduction in natural gas consumption for power generation following Songas' expiration of the power generation contract. During the review period, the maximum average production reached 73.6 MMscfd in October 2024, while the lowest average production recorded was 35.8 MMscfd in January 2025. **Figure 5** illustrates Monthly Songas Gas Plant Capacity Utilisation in FY 2024/25



Figure 5: Monthly Songas Gas Plant Capacity's Utilisation in FY 2024/25

(iv) M&P Gas Processing Capacity Utilisation

The M&P gas processing facility achieved an average daily utilisation rate of 2.72 MMscfd, which represents 27.2% of its capacity in the fiscal year 2024/25. This utilisation rate indicates a decrease of 6.4% from the prior year's average of 3.36 MMscfd and a reduction of 33.6%. **Figure 6** illustrates the capacity utilization of the M&P gas processing plant during FY 2024/25.



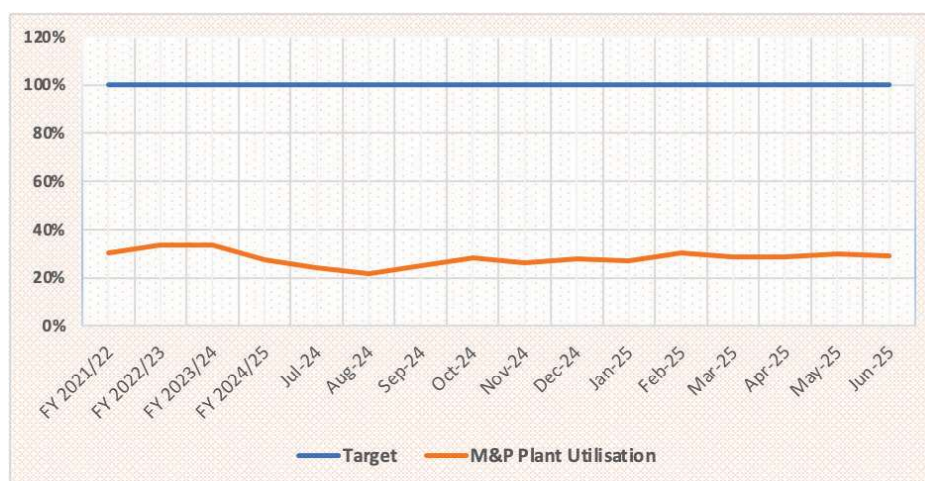


Figure 6: Average Monthly M&P Gas Plant Capacity Utilization

4.1.1.5 Processed Natural Gas

The volume of natural gas processed declined by 25.81%, from 82,919.62 MMscf in FY 2023/24 to 61,514.18 MMscf. This notable reduction in consumption can be attributed primarily to a decline in natural gas use for power generation. **Table 5** presents a three-year trend in natural gas processing.

Table 5: Natural Gas Processing Trend

Processing Plant	Supplied Gas (MMscf)				Increment (%) between FY 2021/22 and 2022/23
	2021/22	2022/23	2023/24	2024/25	
TPDC Madimba	30,798.15	32,636.11	40,138.66	32,666.69	-18.62%
TPDC Songo Songo	12,249.00	13,039.68	8,817.32	7,743.12	-12.18%
Songas	28,440.94	34,220.40	32,825.69	20,130.70	-38.67%
Maurel Prom (M&P)	1,045.48	1,170.97	1,130.95	973.67	-13.91%
Total	72,533.56	81,067.15	82,912.62	61,514.18	-25.81%

Source: TPDC, Songas & M&P

4.1.2. Asset Integrity Management

The Authority conducted a compliance assessment of the asset integrity management plans for all four operational gas processing plants during the review period. The assessment focused on critical equipment, including pressure safety valves (PSVs), export meters, and gas chromatography units. The evaluation determined that all regulated entities successfully adhered to their respective facility integrity plans, as further detailed in **Table 6**.



Table 6: PSV, Metering and Chromatography Device's Integrity Matrix

Processing Plant	Type of devices	No. of devices available	The device Planned for calibration	Device calibrated in %	Target in %
TPDC – Songo Songo	PSV	84	84	100%	100%
	Export Meter	2	2	100%	100%
	Gas Chromatography	1	1	100%	100%
TPDC - Madimba	PSV	92	92	100%	100%
	Export Meter	2	2	100%	100%
	Gas Chromatography	1	1	100%	100%
M&P	PSV	16	16	100%	100%
	Meter	1	1	100%	100%
	Chromatography	2	2	100%	100%
Songas	PSV	104	104	100%	100%
	Meter	1	1	100%	100%
	Gas Chromatography	2	2	100%	100%

Source: TPDC, Songas and M&P

4.1.3. Natural Gas Quality Monitoring

During the review period, the Authority continued to monitor the quality of natural gas to ensure regulatory standards and customer requirements are met. The natural gas produced by the four processing plants met the required standards. The gas quality data for the four processing plants analysed during this period are presented in **Table 7** below.

Table 7: Composition and Quality of Natural Gas as of 30th June 2025.

Natural Gas Component	Standard	Songas	TPDC- SSI	TPDC-Madimba	M&P
Methane (CH ₄)	87.0 - 99.0	97.1938	97.9290	98.73890	98.10174
Ethane (C ₂ H ₆)	1.5 - 9.0	0.9759	0.6571	0.18050	1.01226
Propane (C ₃ H ₈)	0.1 - 1.5	0.2849	0.2773	0.02450	0.26489
iso-Butane (C ₄ H ₁₀)	0.01 - 0.3	0.0619	0.0619	0.00390	-
n-Butane (C ₄ H ₁₀)	0.01 - 0.3	0.0798	0.0719	0.00390	0.09748
iso-Pentane (C ₅ H ₁₂)	trace - 0.04	0.0281	0.0179	0.00160	-
normal-Pentane (C ₅ H ₁₂)	trace - 0.04	0.0248	0.0163	0.00160	0.02226
Hexanes (C ₆ H ₁₄)	trace - 0.06	0.0264	0.0000	0.00200	0.02553
Carbon Dioxide (CO ₂)	0.05 - 1.0	0.5457	0.4152	0.18020	0.29666
Nitrogen (N ₂)	0.2 - 5.5	0.6769	0.7197	0.85340	0.17918
Hydrogen Sulphide (H ₂ S)	trace to 0.02	0.0000	0.0000	0.0000	0.0000
Moisture (ppm)	trace to 5.0	0.9192	0.0000	0.0000	11.08
Specific Gravity	0.57 to 0.62	0.6978	0.5729	0.56169	0.56
Gross Heating Value (MJ/m ³)	36.0 to 40.2	37.9397	38.0040	39.50255	38.104

Source: www.uniongas.com, Songas, TPDC and M&P



4.2. Natural Gas Transmission Pipeline Infrastructures

In FY 2024/25, the transportation of natural gas continues to rely on three existing transmission pipelines that transport natural gas from processing plants to distribution networks in the Mtwara, Lindi, Pwani, and Dar es Salaam regions. The existing pipelines have a total length of 810.5 km and a combined capacity of 969 MMscfd.

The transmission pipelines include isolation valves, commonly known as Block Valve Stations (BVS) or Main Line Valves (MLV), which control flow, allow for future connections, and enable emergency shutdowns. There are a total of twenty-six (26) isolation valves installed along the pipelines, with 16 along the TPDC pipeline, nine (9) for the Songas pipeline, and one (1) for the M&P pipeline.

The details of the installed transmission lines, including their capacity and respective operators, are provided in **Annex 6**. The specific lengths for each operator are detailed in **Table 8**.

Table 8: Transmission Pipeline Length

S/N	Owner	Pipeline Length (km)	Number of Valve Stations	% Contribution
1	TPDC	551	16	68
2	Songas	232.0	9	28.6
3	Maurel & Prom (M&P)	27.5	1	3.4
Total		810.5	26	100

Source: TPDC, Songas & M&P

4.2.1. Natural Gas Transmission Technical Performance

The Authority monitors the technical performance of transmission pipelines by analysing five key factors: service availability, utilisation rate, outage statistics, way-leave clearance, and pipeline integrity management. Performance data for these indicators were collected via the daily and monthly reports submitted by regulated entities.

4.2.1.1 Transmission Pipeline Availability, Utilisation and Outages

The three natural gas transmission pipelines maintained 100% availability throughout the year under review, with zero operational outages reported. Despite this reliability, overall utilization of the pipelines remained well below their rated capacities. The utilisation rates for the year under review were 14.1% for the TPDC line, 50.11% for Songas's line, and 3.3% for the M&P line.

The Songas pipeline has experienced a significant downward trend in utilisation over the past two years; however, it remains the only pipeline operating at more than 50% of its capacity. The TPDC transmission pipeline has demonstrated a slight and consistent upward trend in capacity utilization over the past five years, but this trend has slightly declined in FY 2024/25. The TPDC and M&P transmission pipelines continue to operate under their designed capacity, with utilization levels below 20% and 5%, respectively.

Table 9 details the transmission pipeline capacity utilization for each service provider over the last five consecutive years, including the current review period. The monthly average utilization for each transmission pipeline in FY 2024/25 is visually represented in **Figures 7, 8, and 9**.

Table 9: Transmission Pipeline Availability against Capacity Utilisation

Name	Installed capacity (MMscfd)	Availability (%)	Capacity Utilization (%)				
			FY 2020/21	FY 2021/22	FY 2022/23	FY 2023/24	FY 2024/25
TPDC	784	100	13	15	16	17	14
Songas	105	100	60	71	99	69	50
M&P	80	100	3	4	4	3	3

Source: TPDC, Songas and M&P



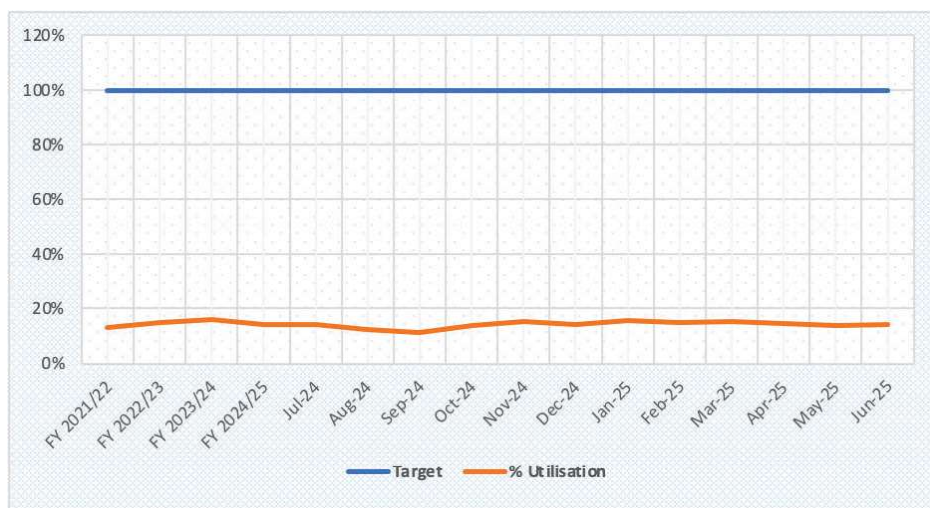


Figure 7: TPDC Pipeline Capacity Utilisation



Figure 8: Songas Pipeline Capacity Utilisation

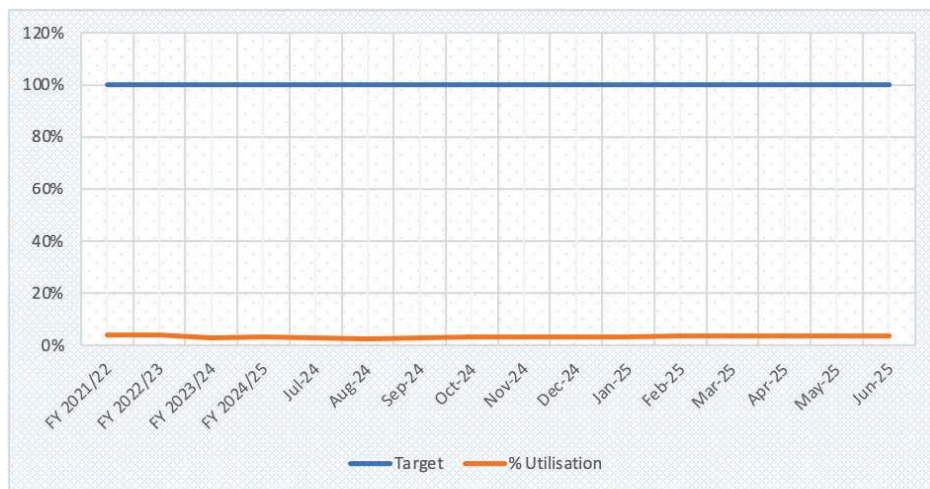


Figure 9: M&P Pipeline Capacity Utilisation

4.2.1.2 Transmission Pipeline Integrity Management

The Authority conducted a compliance assessment of the asset integrity management plans of the transmission pipeline operators. The evaluation involved examining maintenance and repair documentation for the major equipment of the transmission infrastructure to assess asset condition and inform future actions. This equipment includes PSVs, export meters, cathodic protection systems, pipeline pigging, and wayleave management. Continuous monitoring of the integrity plan ensures the smooth operation of the natural gas transmission infrastructure and compliance with safety standards.

(a) PSV and Meter Device's Integrity

Regulated entities calibrated their PSVs and meters according to their Integrity Management Plans (IMPs) to ensure accurate operation during measurements. During the review period, only M&P calibrated its meter while others had their calibration date not due. **Table 10** summarises the performance of PSV and export meters relative to their integrity plans.

Table 10: PSV and Meter Device's Integrity

Operator	Type of devices	Available devices	Planned calibration	Device recalibrated	Compliance in %	Target %
TPDC	PSV	10	0	0	N/A	N/A
	Meter	6	0	0	N/A	N/A
M&P	PSV	N/A	N/A	N/A	N/A	N/A
	Meter	1	1	1	100	100
SONGAS	PSV	10	0	0	N/A	N/A
	Meter	N/A	N/A	N/A	N/A	N/A

Source: TPDC, Songas and M&P

(b) Pipeline Cathodic Protection

During the reporting period, corrosion mitigation was successfully achieved through effective management of cathodic protection (CP) systems by regulated entities. This was accomplished by consistently maintaining the necessary pipe-to-anode electrical potential difference essential for optimal system operation. The distance covered by cathodic protection and the transmission pipelines' cathodic protection test points checked are presented in **Table 11** and Annex 6, respectively.

Table 11: Corrosion Protection System (Cathodic Protection)

Pipeline Name	Total Length (km)	CP covered Length (km)	Available CP units	Default CP units
TPDC	551	551	8	0
Songas	232.0	232.0	7	0
M&P	27.86	27.86	4	0

Source: TPDC, Songas, and M&P

(c) Pipeline Pigging

In FY 2024/25, TPDC performed pigging on its high-pressure transmission pipeline from Mtwara to Songo Songo Island and to Dar es Salaam via Somanga Fungu. The inspection results show that the pipe was in good condition; however, a few points were identified that require repair. The repair works are scheduled in the FY 2025/26 maintenance plan. **Table 12** summarises the previous pigging results, including the total length inspected.



Table 12: Pipeline Pigging

Name	Pipeline Length (km)	Date of last pigging	Length of PIG run (km)	Identified defects	Identified defects
TPDC	551	May 2025	551	0	0
SONGAS	232.0	Not due	N/A	N/A	N/A
M&P	27.865	September 2023	27.865	1	0

Source: TPDC, SONGAS, and M&P

(d) Transmission Pipeline Wayleave Management

Transmission pipeline operators continued to maintain their wayleaves by patrolling, clearing, restoring the affected areas, monitoring third-party activities, eliminating encroachment, and maintaining community awareness along the wayleave. **Table 13** illustrates the implementation of the wayleave management plan for the FY 2024/25.

Table 13: Transmission Pipelines Wayleave Management

Name of operator	Planned wayleave patrol	Performed wayleave patrols	Wayleave Patrolling Compliance	Interruptions/ erosions affected	Encroachments points
TPDC	4	4	100%	11	2
SONGAS	4	4	100%	4	0
M&P	12	11	92%	1	0
Total	20	19	-	16	2

Source: TPDC, Songas and M&P

4.3. Natural Gas Distribution Infrastructure

In the financial year 2024/25, the natural gas distribution supply network has expanded significantly in Dar es Salaam, Pwani, Mtwara, and Lindi regions. Meanwhile, virtual pipeline supply systems have grown in Kibaha, the Industrial area, Morogoro, and Ruvuma, Pwani region. Additionally, CNG filling stations in Dar es Salaam have increased compared to the previous financial year.

4.3.1. Natural Gas Distribution Pipeline Network

The performance of natural gas distribution pipelines was evaluated based on their network expansion, the number of connected customers, quality of service, natural gas consumption, wayleave clearance, and pipeline integrity management.

During the financial year 2024/25, TPDC constructed a total distribution network of 1.106 km, while PAET added 0.98 km to its network. As a result, the total distribution network by June 2025 stands at 186.177 km. In the review period, a total of 2.086 km was constructed compared to the previous financial year. The increase in distribution networks was driven by the construction of supply lines connecting institutions, CNG filling stations, and industries. **Table 14** provides detailed information on the existing natural gas distribution pipeline network.

Table 14: Existing Natural Gas Distribution Pipeline Networks

Network Location	Service Provider Name	Length (km)	No. of PRS	No. of Main Line Valves
Dar es Salaam 1	PAET	61.000	54	148
Dar Es Salaam 2	GASCO	56.480	18	146
Pwani	GASCO	13.532	8	49
Lindi	GASCO	28.125	2	21
Mtwara	GASCO	28.040	5	73
Total		186.177	87	437

4.3.1.1 Connected Customers to Natural Gas Supply Services.

During the financial year under review, ten (10) new customers were connected to the natural gas distribution network, representing a 25% increase from the previous year, which had eight (25) connections. The connected customers include TANESCO's 40MW Power Plant at Hiari village in Mtwara region, Keda and Kinglion industries in Pwani, Aluminium Africa Industries, and Dar es Salaam University College of Education (DUCE) in Dar es Salaam. Additionally, CNG filling stations at Rafiki, TAQA Dalbit, TPDC, and Victoria in Dar es Salaam were connected. **Table 15** summarises the number of customers connected by TPDC and PAET, categorized according to their types in FY 2024/25. The list of connected customers can be found in **Annex 8, Annex 9, Annex 10, and Annex 11**.

Table 15. List of natural gas-connected customers

Service Provider	Number and category of connected customers in FY 2024/25				
	Power	Industries	Commercial	Institution	CNG Station
TPDC	1	2	0	1	2
PAET	0	2	0	0	2
Total	1	4	0	1	4

4.3.1.2 Distribution Network Wayleave Management

In FY 2024/25, the performance of regulated entities was evaluated based on the number of planned wayleave patrols against actual performance, the avoidance of disruptions caused by third-party activities, erosion restoration efforts, and measures taken to mitigate encroachment. Operators, TPDC, and PAET conducted wayleave patrols according to their plans, resulting in the report of six (6) encroached areas. **Table 16** provides details on pipeline wayleave management, and **Annex 13** lists instances of pipeline wayleave interference.

Table 16: Distribution Pipeline Wayleave Management

Name of operator	No. of wayleave patrols planned	No. of Wayleave patrols performed	% Compliance wayleave patrol	Encroached areas
TPDC	12	12	100	2
PAET	365	365	100	4

Source: TPDC & PAET

4.3.1.3 Distribution Infrastructure Integrity Management

The Authority continues to monitor the performance and integrity of the natural gas distribution infrastructure through compulsory calibrations of pressure safety valves (PSV), flow meters, and gas leakage surveys. As shown in **Annex 14**

4.3.2. Compressed Natural Gas (CNG)

The Authority issued six (6) CNG operation licences, of which four (4) were for running CNG filling stations and two (2) for CNG supply operations. The number of CNG filling stations has increased from five (5) in the FY 2023/24 to nine (9) in the FY 2024/25. The list of CNG operators as of June 2025 is shown in **Table 17**.



Table 17: The list of CNG Filling Station operators as of 30th June 2025

No.	Owner	Location	Type of Operation
1.	PAET/TPDC Ubungu	Dar es Salaam	CNG Filling Station
2.	Dangote Cement Limited	Mtwara	CNG Filling Station - Own Use
3.	Dangote Cement Limited	Mkuranga	CNG Filling Station - Own Use
4.	Tembo Energies Limited	Dar es Salaam	CNG Filling Station
5.	TAQA Dalbit Tanzania Limited	Dar es Salaam	CNG Filling Station
6.	Rafiki CNG Station and Conversion Centres Limited	Dar es Salaam	CNG Filling Station
7.	Tanzania Petroleum Development Corporation	Dar es Salaam	CNG Filling Station
8.	Anric Gas Technology (T) Co. Ltd	Dar es Salaam	CNG Filling Station
9.	TAQA Dalbit (T) Limited	Dar es Salaam	CNG Filling Station
10.	Anric Gas Technology (T) Co. Ltd	Dar es Salaam	CNG Supply License
11.	Tan Health Limited	Dar es Salaam	CNG Supply License
12.	Tanzania States Natural Gas Holdings Company Limited	Dar es Salaam	CNG Supply License

4.3.3. Integrity of CNG Stations

The Authority conducted continuous monitoring of the performance and integrity of all CNG facilities. This oversight included evaluating the operation and maintenance of PSVs, meters, dispensers, and compressors, as well as the certification of CNG cylinders. Facility performance was also assessed based on the CNG vehicle fueling procedures, gas leak surveys, and adherence to Health, Safety, and Environment (HSE) requirements. During the period under review, all CNG station operators demonstrated compliance with established standards and their respective integrity management plans.

However, specific compressor downtimes were recorded: PAET – Ubungu experienced 128 hours of downtime, and TAQA – Kipawa recorded 32 hours. These instances were caused by planned maintenance activities, resulting in a compressor availability of 97.95% and 98.18%, respectively. Further details on the performance of CNG filling stations, including PSVs, meters, dispensers, cylinders, and compressors, are presented in **Tables 18** and **19**.

Table 18: PSV, Meter, and CNG Dispenser Calibration

S/N	Operator	Type of devices	No. of devices available	No. of device re-calibrated	Calibration in %	Target %
1.	PAET/TPDC Ubungu	PSV	5	5	100	100
		Meter	3	3	100	100
		Dispenser	1	1	100	100
2.	DANGOTE - Mtwara	PSV	24	24	100	100
		Meter	2	2	100	100
		Dispenser	2	2	100	100
3.	DANGOTE - Mwanambaya	PSV	20	20	100	100
		Meter	1	1	100	100
		Dispenser	2	2	100	100
4.	ANRIC Gas - Tazara	PSV	1	1	100	100
		Meter	1	1	100	100
		Dispenser	1	1	100	100
5.	TAQA - Kipawa	PSV	4	4	100	100
		Meter	3	3	100	100
		Dispenser	3	3	100	100
6.	RAFIKI - Tabata Dampo	PSV	5	5	100	100
		Meter	-	-	-	100
		Dispenser	6	6	100	100

S/N	Operator	Type of devices	No. of devices available	No. of device re-calibrated	Calibration in %	Target %
8.	TAQA - Mlimani	PSV	20	20	100	100
		Meter	4	3	75	100
		Dispenser	4	3	75	100
9.	TPDC - Mlimani	PSV	47	47	100	100
		Meter	3	3	100	100
		Dispenser	7	7	100	100

Table 19: CNG Cylinders Integrity Compliance

S/N	Operator	No of cylinders	No. of storage cylinders inspected	Condemned cylinders
1.	PAET	142	142	0
2.	ANRIC	50	50	0
3.	DANGOTE - Mtwara	3	3	0
4.	TAQA - Kipawa	40	40	0
5.	DANGOTE - Mkuranga	6	6	0
6.	RAFIKI	9	9	0
7.	TEMBO	60	60	
8.	TAQA - Ubungo	40	40	0
9.	TPDC - Ubungo	6	6	0

4.3.4. CNG Register

According to Regulation 20 of the Petroleum (Natural Gas Midstream and Downstream) General Regulations, 2020, the Authority continued to maintain the list of registered CNG-Vehicle Workshops, a list of certified CNG Fuel System Inspectors (CNG-FSI), and a list of CNG-Vehicles in the National Petroleum and Gas Information System (NPGIS). During the period under review, only one new CNG-V Workshop was registered in the database, namely Exogas Green Solutions Limited, whereas last year four workshops were registered: Hope Car Service Co Ltd, Diamond Motors Ltd, Milo Security Company Ltd, and TAQA Dalbit.

The updated list of registered Conversion Workshops is displayed in **Table 20**. The Authority advised the public to use authorised conversion workshops to prevent issues caused by unsafe and unprofessional practices.

Table 20: EWURA's Registered CNG Conversion Workshop

S/N	CNG-V workshop	Location	Region
1.	ANRIC	TAZARA	Dar es Salaam
2.	BQ Contractor	Mbezi Juu	Dar es Salaam
3.	Dangote	Hiari	Mtwara
4.	DIT	Dar es Salaam	Dar es Salaam
5.	Kleenair	Kigamboni	Dar es Salaam
6.	MOL	Keko Mwanga	Dar es Salaam
7.	NK	Mbezi beach shule	Dar es Salaam
8.	Triangle	UDSM	Dar es Salaam
9.	Hope Car Service Co Ltd	Sinza	Dar es Salaam
10.	Diamond Motors Ltd	Vingunguti	Dar es Salaam
11.	Milo Security Company Ltd	Mbezi beach	Dar es Salaam
12.	TAQA Dalbit.	Kipawa	Dar es Salaam
13.	Exogas Green Solutions Limited	River Side – Ubungo	Dar es Salaam

As of 30th June 2025, the number of CNG Vehicles and Three-Wheel Motorcycles increased significantly from 7,000 reported in the previous Financial Year to around 15,954, equivalent to 128% increase. The



rapid increase is attributed to the expansion of CNG filling stations and the import of ready-made three-wheel motorcycles fitted with CNG cylinders. **Table 21** shows the number of CNG-V by category and CNG three-wheel motorcycles.

Table 21. CNG-V by Category and CNG Three-Wheel Motorcycles

S/N	Vehicle Category	Total No.
1.	Sedan	1,001
2.	Hatchbacks	2,093
3.	Trucks	603
4.	SUV & Wagon	312
5.	Van & Mini-Van	451
6.	Bus	34
Sub-Total CNG-Vehicle		4,494
7.	Three-Wheels Motorcycle	11,460
Sub-Total CNG-Motorcycle		11,460
Total CNG Vehicle and 3-Wheel Motorcycle		15,954

In the Financial Year 2024/25, five (5) new CNG-FSIs were approved by TBS and registered in the NPGIS. This represents a 71% increase compared to seven (7) registered CNG-FSIs in the previous Financial Year. Therefore, as of June 2025, there are twelve (12) registered CNG-FSIs. **Table 22** shows the list of CNG Fuel System Inspectors and Certifiers.

Table 22: List of CNG Fuel System Certifiers (CNG-FSI)

S/N	CNG-FSI/C	Certification No	Location	Contact
1.	Dr. Rajab Hassan	U10343A	DSM	hmrajabu@gmail.com
2.	Godwin Kulinga	U11771A	Arusha	godwinnkulinga@gmail.com
3.	Paul Makoye	U11646A	Arusha	makoyepaul2000@gmail.com
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Source: CSA GROUP (<https://www.csagroup.org>)

4.4. Natural Gas Quality of Service

The Authority assessed the quality of natural gas supply based on each operator's ability to reliably deliver gas to various end-user customers, including power plants, industries, institutions, CNG vehicles, and households. The Authority fulfils its oversight role by evaluating the performance of the natural gas sector based on the quality, availability, and reliability of regulated services. During the reporting period, service delivery at CNG stations was intermittently affected by both planned maintenance and unexpected utility outages. Additionally, during the review period, heavy rain caused flooding that disrupted the Songas natural gas transmission pipeline's operation and triggered the emergency shutdown valve.



4.5. Health, Safety, and Environment

The Authority maintained a strict oversight framework to assess the Health, Safety, and Environmental (HSE) effectiveness of all regulated entities. This was done by monitoring key performance indicators, which included the number of near misses, incidents, accidents, lost-time injuries, hydrocarbon spills, effluents discharged into water bodies, and flared gas released into the environment. During the review period, the regulated entities upheld a clean record, with no significant Health, Safety, and Environmental violations or incidents reported to the Authority. This highlights the regulated entities' commitment to upholding high standards of safety and environmental responsibility.

4.5.1. Near Miss, Incidents, Accidents, and Lost Time Injury

In the FY 2024/25, the HSE performance of regulated entities continues to improve compared to previous years. It was discovered that there were no deaths or lost workday cases resulting in Lost Time Injury (LTI) in FY 2024/25. **Table 23** illustrates HSE performance in FY 2024/25.

Table 23: Near Miss, Incidents, Accidents, and Lost Time Injury

Facility	Near miss	Incidents	Accidents	Lost Time Injury	Injuries Occurred	Target Set
Gas Processing Plants						
TPDC - Madimba	11	3	0	1	1	0
TPDC – Songosongo	3	0	0	0	0	0
SONGAS	1	13	3	0	0	0
M&P	5	1	8	0	0	0
Transmission Pipelines						
TPDC	12	0	1	0	0	0
SONGAS	0	0	0	0	0	0
M&P	0	0	0	0	0	0
Distribution Pipelines						
TPDC	5	0	0	0	1	0
PAET	0	0	0	0	0	0
Total FY 2022/23	26	18	3	0	0	0
Total FY 2023/24	32	17	3	0	0	0
Total FY 2024/25	37	17	12	1	1	0

Source: M&P, SONGAS, PAET & TPDC

4.5.2. Emergency Response Plan Performance

The Authority continued to evaluate the performance of regulated entities regarding the planning, timely completion, and response rates of HSE exercises. **Table 24** shows the regulated entities' HSE drill performance during the FY 2024/25 compared to the previous one.

Table 24: Emergency Response Plan Performance

Facility	Planned HSE Drills	Performed HSE Drills	Performed within a set time	Performance against Plan in %	Response Rate (%)	Set target in %	Actual accident occurred
Gas Processing Plant							
TPDC-Madimba	4	4	4	100	100	100	0
TPDC - Songo Songo	4	4	4	100	100	100	0
SONGAS	12	8	8	66.7	100	100	7
M&P	15	9	9	60	100	100	0



Facility	Planned HSE Drills	Performed HSE Drills	Performed within a set time	Performance against Plan in %	Response Rate (%)	Set target in %	Actual accident occurred
Transmission Pipelines							
TPDC	4	4	4	100	100	100	0
SONGAS	0	0	0	0	0	0	0
M&P	1	1	1	100	100	100	0
Distribution Pipelines							
TPDC	4	4	4	100	100	100	0
PAET	1	1	1	100	100	100	0
Filling Station							
PAET	1	1	1	100	100	100	0
Total/Average FY 2024/25	46	36	36	91.8	100	100	0
Total/Average FY 2023/24	25	20	17	91	100	100	0
Total/Average FY 2021/22	64	59	57	92	97	100	0

Source: M&P, SONGAS, PAET & TPDC

4.5.3. Environment Performance Indicators

Regulated entities' operations were monitored for environmental pollution protection, including hydrocarbon spills, effluent discharges to aquatic bodies, and flared gas released into the environment. In FY 2024/2025, Songas' plant continued to flare more gas than other facilities. According to the data analysis, the natural gas facilities have complied with the regulations, as indicated in. Also, the gas leak was monitored as illustrated in **Table 25**.

Table 25: Environment Performance Indicators

Environmental Parameters	Standard (UNEP technical publication)	TPDC Madimba	TPDC Songo Songo	SONGAS	M&P
Hydrocarbon spills into the environment (g/kg)	100g/kg	0	0	0	0
Effluents discharge to water bodies (mg/L)	40mg/L	0	32.7	16.7	0
Flared Gas (MMscfd)	0.0317MMscfd	0.09	5.8	41.3	1.03

Source: M&P, Songas, PAET & TPDC

Table 26: Natural Gas Leak Monitoring

Facility	Planned gas leak survey	Conducted gas leak survey	Significant gas leaks occurred	Unplanned gas release	Planned gas release
Gas Plants					
TPDC – Madimba	48	48	0	0	0
TPDC – SS	365	365	0	14	4
SONGAS	365	365	2	9	2
M&P	48	48	0	0	2
Transmission Pipelines					
TPDC-GRFs	365	365	0	0	4
SONGAS	3	3	0	0	0
M&P	48	48	0	0	0
Distribution Pipelines					
TPDC - PRS	48	48	1	0	4
PAET	48	48	0	0	0

Source: M&P, SONGAS, PAET & TPDC



5. NATURAL GAS SUPPLY AND DEMAND BALANCE

The balance between the country's natural gas supply and demand is primarily influenced by field production capacities, processing and transmission infrastructure, and the coverage of distribution networks. This chapter specifically focuses on matching the volume of natural gas supplied to the quantity consumed, while also addressing the total amount produced.

Generally, in FY 2024/25, natural gas supply and consumption decreased compared to the previous Financial Year. The decrease in natural gas production was due to the reduction in natural gas consumption for power generation caused by the increased utilisation of hydroelectric power from the Julius Nyerere Hydropower Project (JNHPP) and the shutdown of Songas power plant due to the expiry of the Power Purchase Agreement (PPA) with TANESCO. The gas that was supposed to be supplied to Songas power plants provides opportunities for other natural gas consumers, especially for industry, CNG for vehicles, and households.

5.1. Produced Natural Gas

The country's natural gas continued to be produced from the existing two fields, Songo Songo and Mnazi Bay gas fields, located in the Lindi and Mtwara regions, respectively. During the period under review, 62,648.66 MMscf of natural gas was produced, whereby 28,432.11 MMscf, equivalent to 45.4%, were from the Songo Songo gas field, and the remaining 34,216.55 MMscf were from the Mnazi Bay gas field. **Table 27** shows details of the natural gas produced in FY 2024/25. This is a decrease of 24% compared to 82,849.40 MMscf recorded in FY 2023/24.

Table 27: Produced Natural Gas in FY 2024/25

Name of Gas Field	Location	Produced Gas (MMscf)	% share
Songo Songo Field	Lindi	28,432.11	45.4%
Mnazi Bay Field	Mtwara	34,216.55	54.6%
Total		62,648.66	

5.2. Natural Gas Supply

In FY 2024/25, the total supply of natural gas, also called "exported gas", measured at the entry to the transmission pipeline, decreased by 25% following a 25% reduction at the processing plant. Output fell to 61,514.18 MMscf, down from 81,868.86 MMscf reported in FY 2023/24. Detailed figures for individual processing plants are provided in **Table 28**. **Figures 10** and **11** illustrate the trend in natural gas supply over the past five years for each processing plant and the combined supply of all plants, respectively.

Table 28: Comparison of Natural Gas Supply for Previous Financial Years

Processing Plant	Supplied Natural Gas (MMscf)					% Variance between FY 2023/24 and 2024/25
	FY 2020/21	FY 2021/22	FY 2022/23	FY 2023/24	FY 2024/25	
TPDC Madimba	26,919.20	30,798.15	32,636.11	39,805.80	32,666.69	-18%
TPDC Songo Songo	8,842.10	12,249.00	13,039.68	8,661.86	7,743.12	-11%
Songas	23,978.40	28,440.94	34,220.40	32,335.60	20,130.70	-38%
Maurel and Prom (M&P)	879.5	1,045.48	1,170.97	1,065.63	973.67	-9%
TOTAL	60,619.20	72,533.57	81,067.16	81,868.86	61,514.18	-25%

Source: TPDC, Songas & M&P



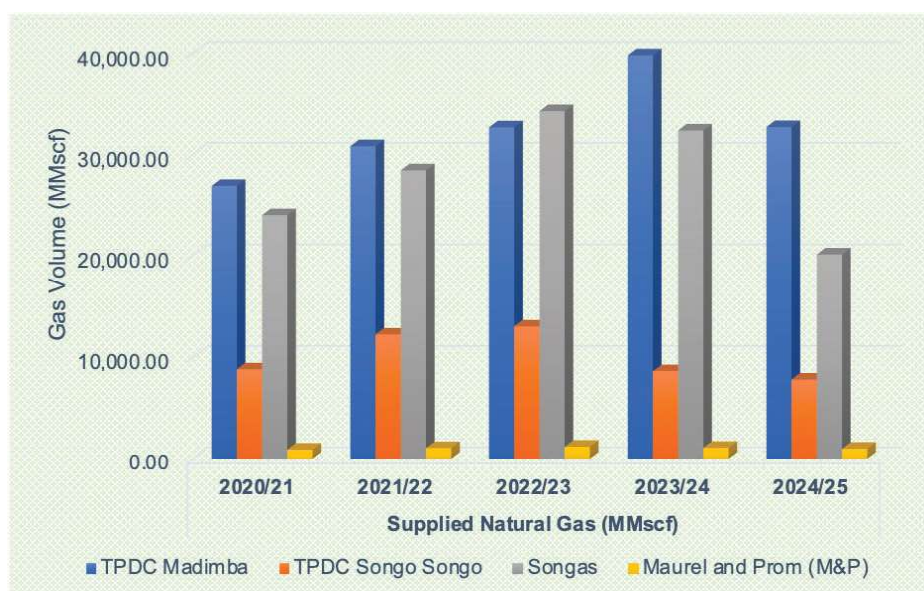


Figure 10: Yearly Natural Gas Supply Trend

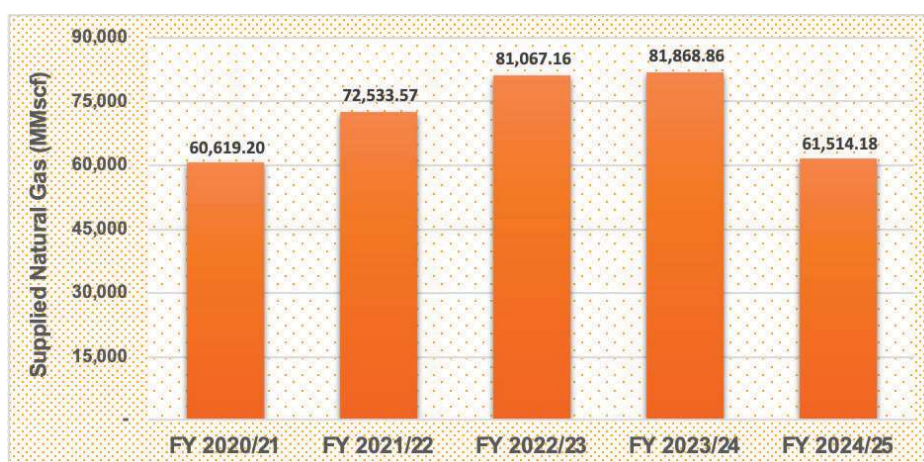


Figure 11: Supplied natural gas from processing plants in FY2024/25

5.3. Natural Gas Consumption

In FY 2024/25, 63,301.35 MMscf of natural gas was consumed compared to 82,025.03 MMscf consumed in the previous Financial Year, equivalent to a 23% decrease. TPDC was the main supplier, contributing 67.79% of the total natural gas consumed, followed by PAET with 30.70%, and M&P with only 1.51%, as presented in **Table 29**. For five consecutive Financial Years, from FY 2020/21 to FY 2024/25, there was an increasing trend in natural gas consumption for CNG-V, domestic customers, and a decrease in natural gas consumption for power generation, as shown in detail in **Annex 12**.

Comparing the supplied natural gas amount, 61,514.18 MMscf, with the consumed natural gas of 63,301.35 MMscf in FY2023/24, it is clear that there is constrained demand for natural gas, with about 1,787.16 MMscf of gas extracted from the line park.



Table 29. Service Provider share of consumed gas

	Service Provider/ Gas Sellers			Grand Total
	TPDC	PAET	M&P	
Gas Consumption (MMscf)	42,910.10	19,436.08	955.17	63,301.35
Gas supplier share	67.79%	30.70%	1.51%	

5.4. Natural Gas Consumers

In the Financial Year 2024/25, the number of households connected to the natural gas distribution networks remained unchanged; however, there is an increase of one (1) power plant, three (3) industries, and one (1) institution. The number of CNG filling stations rose from five (5) to nine (9) stations. The number of natural gas customers in each category is provided in **Table 30**.

Table 30: Natural Gas Customer Categories

FY	Power Plants	Industries	Households	Commercial	Institution	CNG Filling Stations
2020/21	9	48	437	1	8	1
2021/22	11	52	970	1	8	3
2022/23	11	54	1,514	1	8	3
2023/24	12	58	2,262	5	8	5
2024/25	13	61	2,262	5	9	9

5.5. Consumption of Natural Gas by Categories

The customer categories supplied with natural gas included power generation, industries, CNG-V, commercial, institutions, and household. The largest natural gas end-user customers are power plants, which consumed 74.43% of the total gas supplied, followed by the industrial sector with 24.65%, and CNG vehicles with 0.89%. Commercial customers accounted for just 0.02%, while institution and household customers together are the smallest consumers of natural gas, with 0.01%. **Table 31** and **Figure 12** display the quantity and percentage share of gas consumption across customer categories during the reviewed period.

Table 31: Natural Gas Consumption by Categories

Customer Category	Consumed Volume for FY2024/25 (MMscf)				% Consumption
	TPDC	PAET	M&P	Total	
Power	33,807.51	12,350.80	955.17	47,113.48	74.43%
Industries	9,001.36	6,603.86	-	15,605.22	24.65%
CNG Vehicles	94.03	471.03	-	565.06	0.89%
Commercial	0.82	10.18	-	11.00	0.02%
Households and Institutions	6.38	0.21	-	6.59	0.01%
TOTAL	42,910.10	19,436.08	955.17	63,301.35	



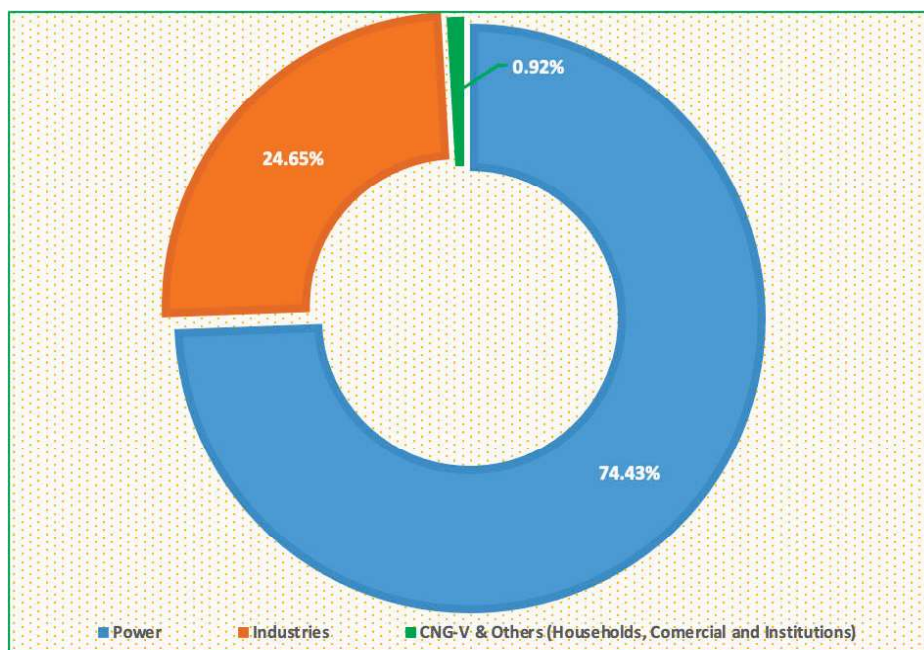


Figure 12. Share of Natural Gas Consumption per Category in FY 2024/25

In FY 2024/25, the sector saw a significant drop in natural gas consumption for power generation compared to the previous financial year, as shown in Figure 14. The share of natural gas in the power generation mix notably fell from 67.1% to 34.68%. This decline mainly resulted from the expiry of the Power Purchase Agreement between Songas Limited and the Tanzania Electric Supply Company (TANESCO).

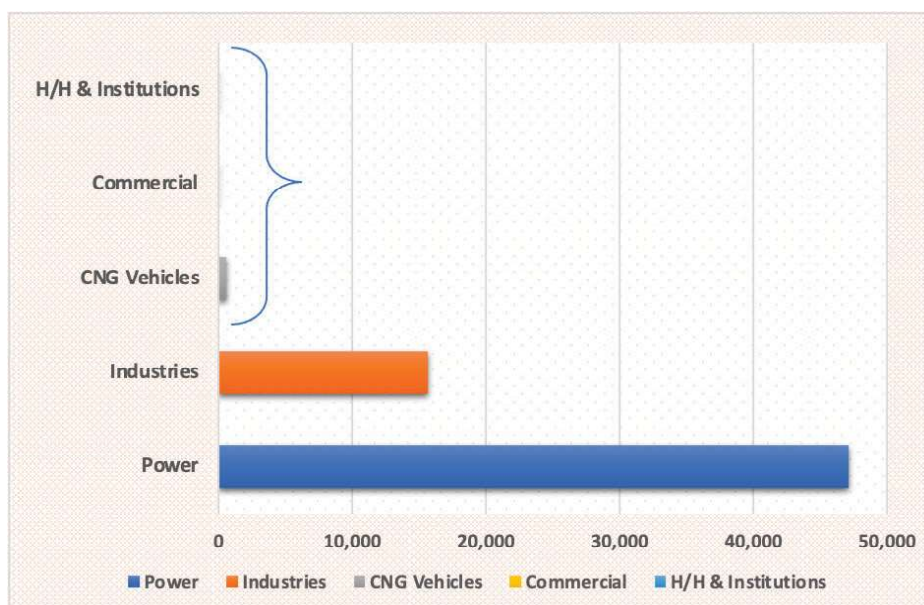


Figure 13. Total Natural Gas Consumption per Category in FY 2024/25

5.6. CO₂ Emission Reduction

The consumption of 63,301.35 million standard cubic feet (MMscf) of natural gas in FY2024/25 provided an energy equivalent of approximately 64,650,000 MMBtu. This resulted in a reduction of 2.6 million metric tons (MT) of CO₂ emissions compared to generating the same energy using Heavy Fuel Oil (HFO). Similarly, this is equivalent to a reduction of 2.72 million metric tons (MT) of CO₂ emissions compared to coal.

5.7. Clean Cooking Initiative

To promote the national clean cooking agenda, during FY 2024/25, the Authority granted approval for the construction of natural gas supply lines designed to connect 470 residences in Lindi and 529 in the Mkuranga area. This expansion of natural gas distribution networks adds to the 2,262 households, five (5) commercial, and nine (9) institutional consumers already connected and using natural gas for cooking across the Mtwara, Lindi, and Dar es Salaam regions, as detailed in **Table 30**.

5.8. Compressed Natural Gas (CNG) Supply and Consumption

5.8.1. CNG Production

During the period under review, four (4) CNG mother stations were licensed by EWURA, including Rafiki, Tembo, TAQA – Ubungu, and TPDC – Ubungu, all located in Dar es Salaam. The amount of CNG produced in FY 2024/25 was 12,297,477.69 kg, representing a 76% increase compared to FY 2023/24, when 7,268,161.87 kg was produced. The increase was attributed to the addition of four more CNG stations, a rise in the number of converted vehicles, and industrial customers in Kibaha's Zegereni industrial area, where there is no gas supply pipeline, leading CNG to be used as a mode of transportation. Figure 14 illustrates the CNG production by each service provider in FY 2024/25, and Table 32 presents the trend of CNG production over the past five (5) years, from FY 2020/21 to 2024/25.

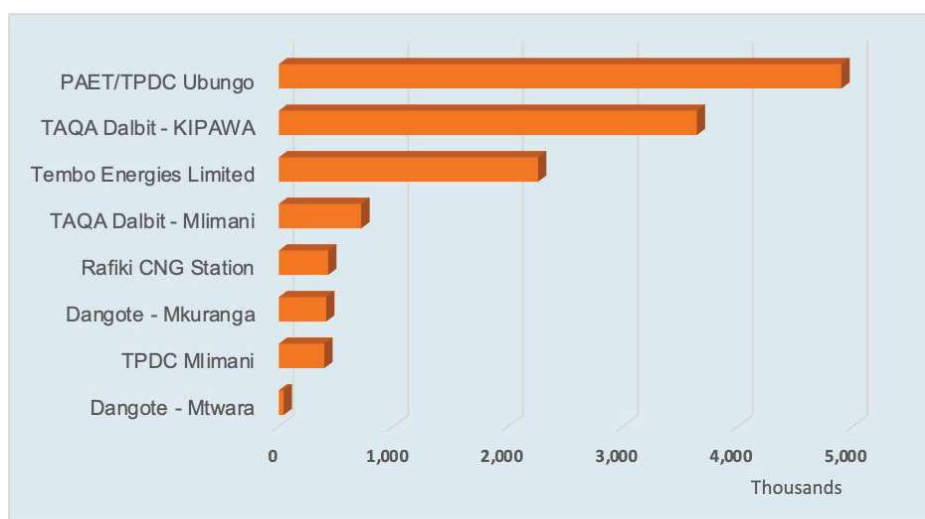


Figure 14: CNG Production in FY 2024/25

Table 32: The CNG production from FY 2023/24 to FY 2024/25

Financial Year	Produced CNG (Kg)	% Yearly Increment	% Increment Compared to FY 2024/25
FY 2020/21	1,511,347.85		747%
FY 2021/22	3,754,493.30	148%	241%
FY 2022/23	4,984,986.56	33%	157%
FY 2023/24	7,268,161.87	46%	76%
FY 2024/25	12,797,477.69	76%	

5.8.2. CNG Consumption

During FY 2024/25, CNG consumption by the transportation sector, through CNG vehicles, increased to 11,190,140.24 kg. This figure accounts for 87% of the total CNG produced during the period and shows a 98% rise compared to the 5,662,448.20 kg of CNG dispensed to CNG-V in the previous financial year. This is equivalent to a 98% increase compared to the amount dispensed into CNG vehicles in the previous



financial year. Beyond the transport sector, the remaining CNG was used to fuel industrial and commercial segments, representing 11% and 2% of the total output respectively. Detailed breakdowns of these consumption patterns are provided in **Table 33**.

Table 33: CNG Supplied to Customers for FY 2024/25

CNG Customer Categories	CNG Consumption (Kg)	% Consumption
CNG Vehicles	11,190,140.24	87%
Industrial	1,399,435.35	11%
Commercial	207,902.08	2%
TOTAL	12,797,477.68	

5.9. Market Share of Natural Gas Operators

Market share for natural gas operators is presented in two ways: total gas volume supplied and specific sales by market category. These categories include power generation and industries.

5.9.1. Market share for the overall supplied natural gas

During FY2024/25, TPDC was the overall leading natural gas supplier, with a market share of 67.79%, supplied gas via its subsidiary company GASCO, followed by PAET at 30.70% and M&P at 1.51%. Last financial year, the overall gas supply market share was 75.52% for TPDC, 23.14% for PAET, and 1.34% for M&P. The changes in market share between FY 2023/24 and 2024/24 were due to a decrease in the supply of natural gas to power plants, as TANESCO increased electricity generation using hydro and decreased the use of natural gas. **Table 34** shows the overall market shares of natural gas suppliers in FY 2024/25.

Table 34: Natural Gas Supplier overall market shares in FY 2024/25

Natural Gas Supplier	Supplied volume (MMscf)	% Market Share
GASCO/TPDC	42,912.54	67.79%
PAET	19,436.07	30.70%
M&P	955.17	1.51%
Total Supplied Gas	63,303.78	

5.9.2. Market share of natural gas supply to power generation

GASCO dominates the natural gas market for **power generation** with a significant **71.76%** share. The remaining market is divided between **PAET**, which holds **26.22%**, and **M&P**, accounting for **2.03%**. **Table 35** indicates the market share of natural gas suppliers for power generation.

Table 35: Market share of natural gas suppliers for power generation

Natural Gas Supplier	Supplied volume (MMscf)	% Market Share
GASCO/TPDC	33,807.51	71.76%
PAET	12,350.80	26.22%
M&P	955.17	2.03%
Total Supplied Gas	47,113.47	

5.9.3. Market share of natural gas supply to industries

In FY 2024/25, GASCO and PAET remain the only suppliers of piped natural gas to industry, with market shares of 58% and 42%, respectively. However, during the period under review, EWURA issued two (2) CNG supply licenses to Tanhealth Limited and Tanzania State Natural Gas Holdings Company Limited, and this makes a total of four (4) companies, including Anric Gas and PAET, that supply natural gas via virtual pipelines to CNG filling stations, commercial and industrial customers. However, their market share



is insignificant compared to TPDC and PAET. **Table 36** shows the market share of natural gas supplies to the industries in FY 2023/24.

Table 36. Market share for industry supplies in FY 2024/25

Gas Supplier	Supplied volume (MMscf)	% Market Share
PAET	6,603.86	42%
GASCO/TPDC	9,001.36	58%
Total	15,605.22	



6. LOCAL CONTENT

During the Financial Year 2024/25, the EWURA actively monitored compliance with local content requirements among regulated entities within the midstream and downstream natural gas sub-sectors. The regulated entities demonstrated compliance with the established Petroleum (Local Content) Regulations, 2017.

6.1. Local Content Performance

The Authority evaluated the local content performance of regulated entities by examining factors such as the number of local employees, the training of local personnel, the use of local financial and insurance services, and the extent of local procurement, in accordance with their approved local content and procurement plans. As detailed in Annex 14, the regulated entities were found to meet the local content requirements. Most materials, goods, and services were procured locally, except for certain items that were unavailable domestically and were obtained with the Authority's approval.

6.2. Local Suppliers and Service Providers Database

In the 2024/25 financial year, a total of 318 new companies were registered in the Local Suppliers and Service Providers (LSSP) database, representing a 15% increase from the previous year. This brought the total number of local companies registered with the EWURA LSSP database to 2,450, up from 2,132 in FY 2023/24. The growth was largely driven by EWURA's enforcement of compliance with Local Content Regulations as well as heightened awareness of the benefits of local participation in oil and gas initiatives, including the EACOP and various natural gas projects.



7. FINANCIAL PERFORMANCE

This section highlights the financial performance of four (4) natural gas-regulated entities during FY 2024/25 compared to the previous three financial years. Financial performance was assessed based on revenue generation and costs incurred in natural gas processing, transmission, and distribution. The financial performance of PAET, TPDC, M&P, and Songas Limited was analysed.

7.1. Revenue Generation

During the period under review, total revenue from the sale of natural gas increased by 4%, rising from TZS 1,040 billion in FY 2023/24 to TZS 1,083 billion in FY 2024/25. Revenue for TPDC remained at TZS 762 billion, while PAET's revenue increased by 21%. Revenue from M&P decreased by 47%, and Songas by 28%. **Figure 15** illustrates revenue generation by companies over four financial years.

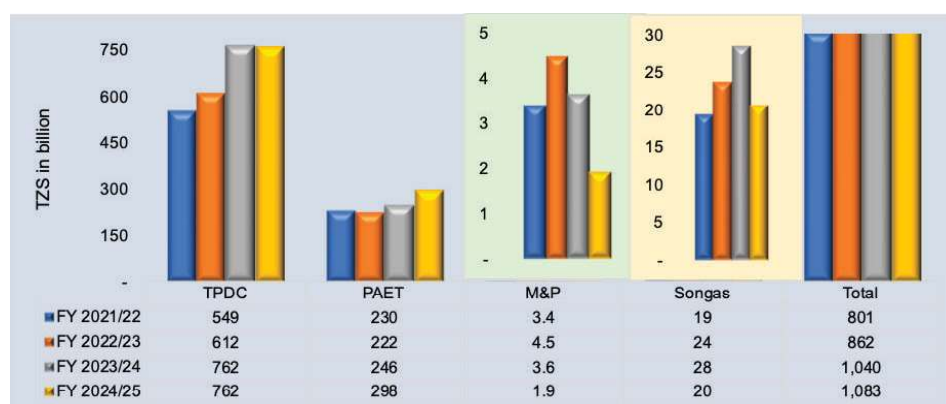


Figure 15: Revenue Generation

7.2. The Natural Gas Operation Costs

In FY 2024/25, total operational costs for natural gas rose by 12% from TZS 284 billion in FY 2023/24 to TZS 319 billion in FY 2024/25. The overall operational costs for TPDC increased by 37%, M&P by 1%, while PAET decreased by 68% and Songas by 93%. **Figure 16** presents a four-year trend of operational costs by companies.

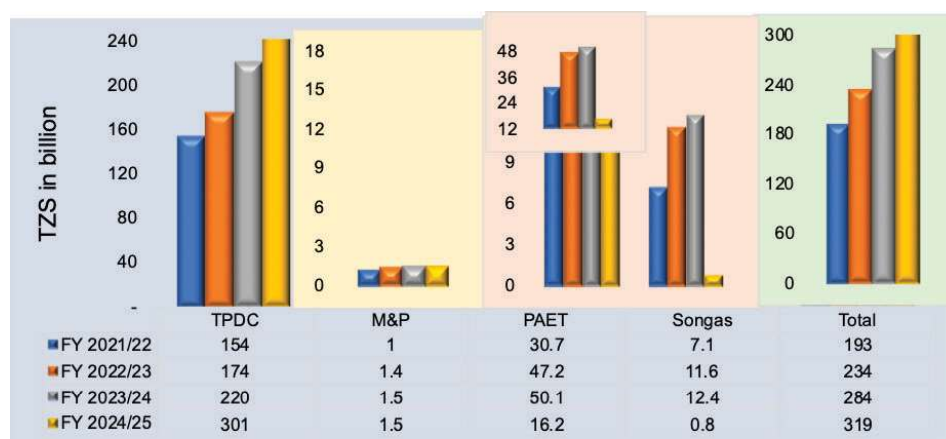


Figure 16: Total Natural Gas Operation Costs by Utilities

In FY 2024/25, the major cost item in natural gas operational costs was various operational costs, which accounted for 40%, followed by depreciation, which accounted for 28%. The staff costs amounted to 19%, and Repair and Maintenance 13%. **Figure 17** shows a four-year trend of operational costs by companies.



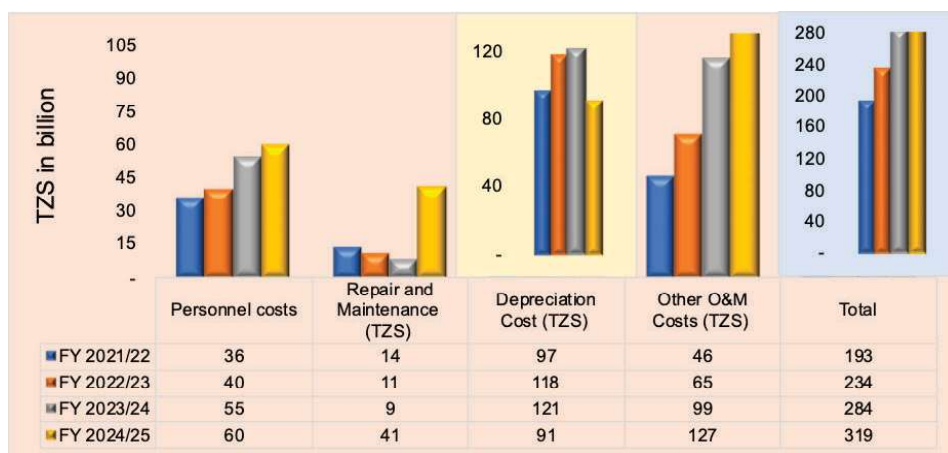


Figure 17: Total Natural Gas Operational Costs by Categories

7.2.1. Processing Costs

Total costs for natural gas processing rose by 17%, increasing from TZS 97 billion in FY 2023/24 to TZS 113 billion in FY 2024/25. **Figure 18** illustrates the trend of natural gas processing costs over the four-year period from FY 2020/21 to FY 2024/25.

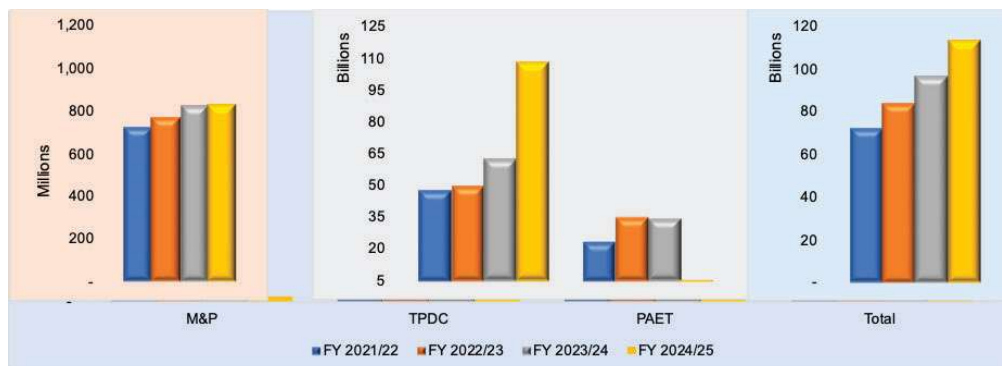


Figure 18: Processing Cost of M&P, TPDC, and PAET

Based on the analysis, the major cost item in natural gas processing for TPDC was staff costs, while PAET and M&P were other O&M Costs. **Figure 19** the processing costs structure of TPDC, PAET, and M&P in FY 2024/25.

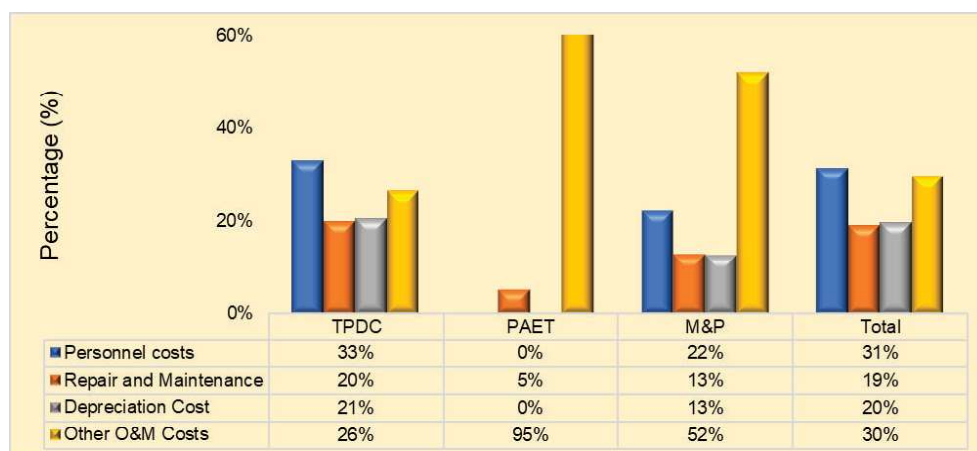


Figure 19: Processing Cost of TPDC, PAET, and M&P in FY 2023/24

7.2.2. TPDC Processing Costs

During the year under review, natural gas processing costs for TPDC increased by 74% from TZS 62 billion in FY 2023/24 to TZS 107 billion in FY 2024/25. The major cost item was staff, accounting for 33% of total natural gas processing costs. **Figure 20** shows TPDC's processing cost structure by percentage for four years.

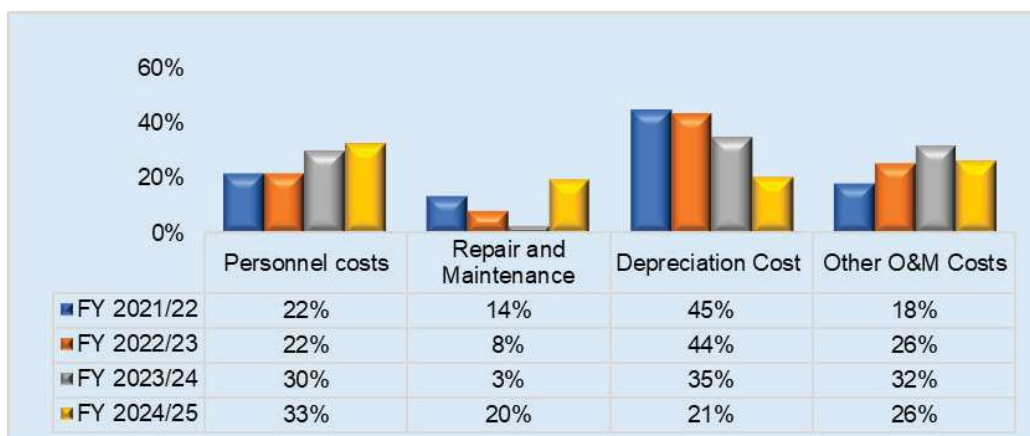


Figure 20: TPDC's Processing Cost Structure by Percentage

7.2.3. PAET Processing Costs

The processing cost of natural gas for PAET decreased by 85%, from TZS 34 billion in FY 2023/24 to TZS 5 billion in FY 2024/25. The largest cost component was other costs, accounting for 95% of the total gas processing costs. **Figure 21** illustrates PAET's processing cost structure by percentage over four years.

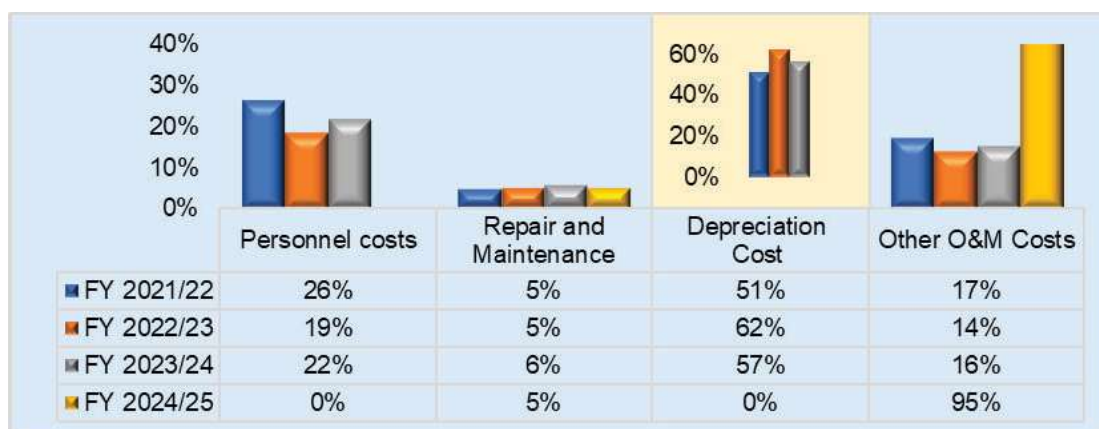


Figure 21: PAET's Processing Cost Structure by Percentage

7.2.4. M&P Processing Costs

During the review period, natural gas processing costs for M&P rose by 0.7%, from TZS 826 million in FY 2023/24 to TZS 832 million in FY 2024/25. The main component was other O&M, accounting for 52% of total natural gas processing costs. **Figure 22** illustrates M&P's processing cost structure by percentage over four years.



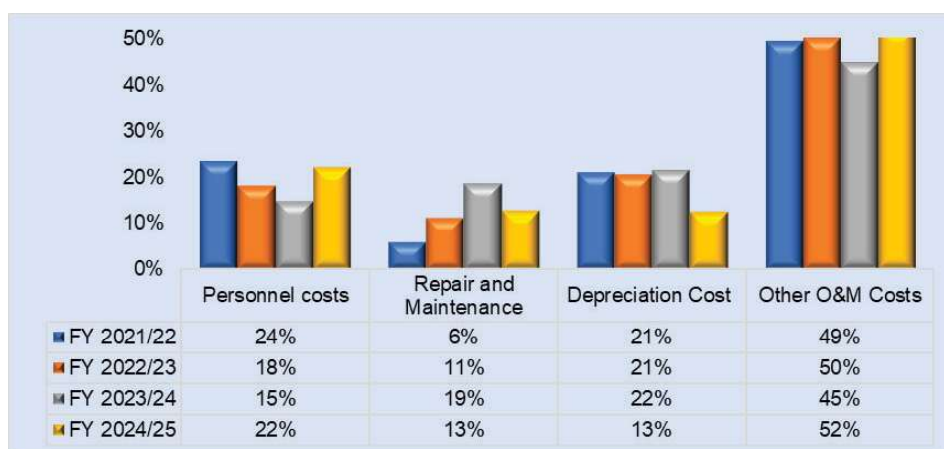


Figure 22: M&Ps' Processing Cost Structure by Percentage

7.3. Transmission Costs

In the reporting period, natural gas transmission costs increased by 2%, from TZS 99 billion in FY 2023/24 to TZS 101 billion. Generally, the major item in the period was depreciation cost, amounting to 56% of all transmission costs. **Figure 23** and **Figure 24** show transmission costs for four years from FY 2021/22 to FY 2024/25 by values and percentage, respectively.

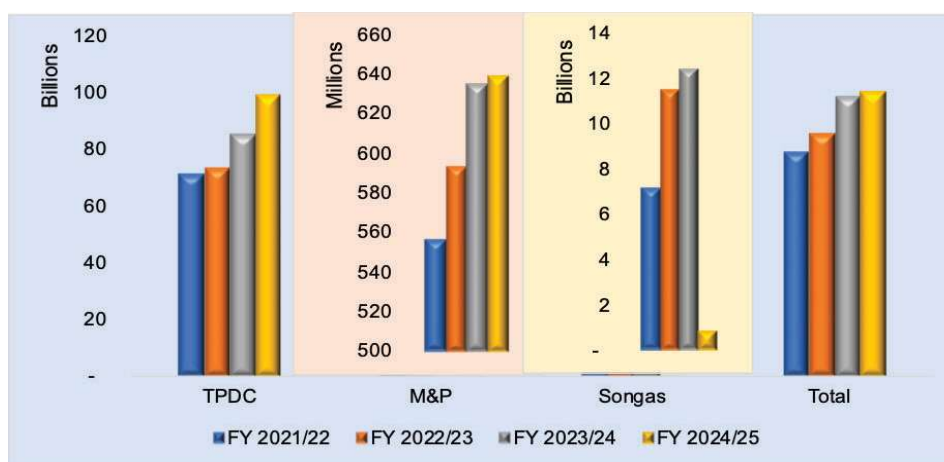


Figure 23: Transmission Cost of TPDC, M&P, and Songas by Values

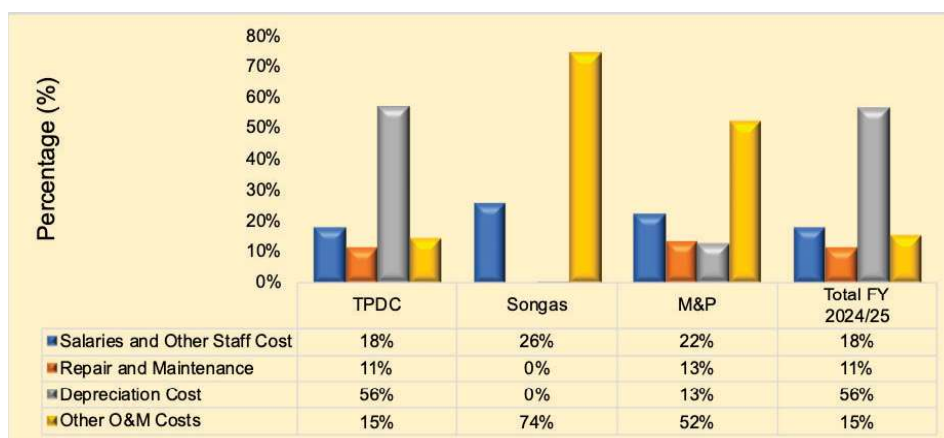


Figure 24: Transmission Cost of TPDC, M&P, and Songas by Percentage

7.3.1. TPDC Transmission Costs

The natural gas transmission costs for TPDC increased by 16%, from TZS 86 billion in FY 2023/24 to TZS 100 billion in FY 2024/25. The main item during this period was depreciation cost, which accounted for 56% of all transmission expenses. **Figure 25** illustrates the trend of TPDC's natural gas transmission costs over four years.

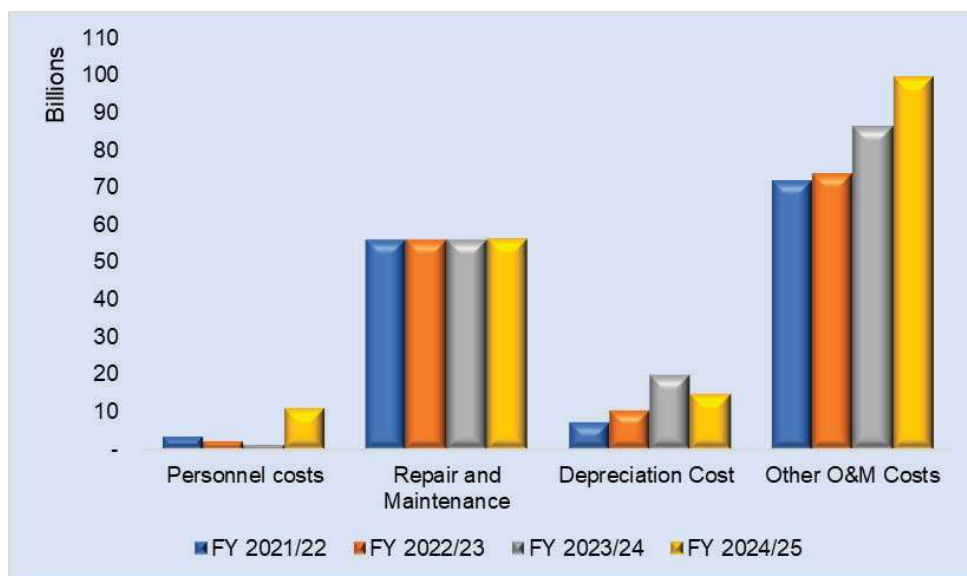


Figure 25: TPDCs' Transmission Costs

7.3.2. M&P Transmission Costs

In the year under review, the cost of natural gas transmission for M&P increased by 0.7%, rising from TZS 634 million in FY 2023/24 to TZS 639 million in FY 2024/25. The largest component during this period was other O&M, which accounted for 52% of all transmission costs. **Figure 26** illustrates the trend of M&P's natural gas transmission costs over four years.

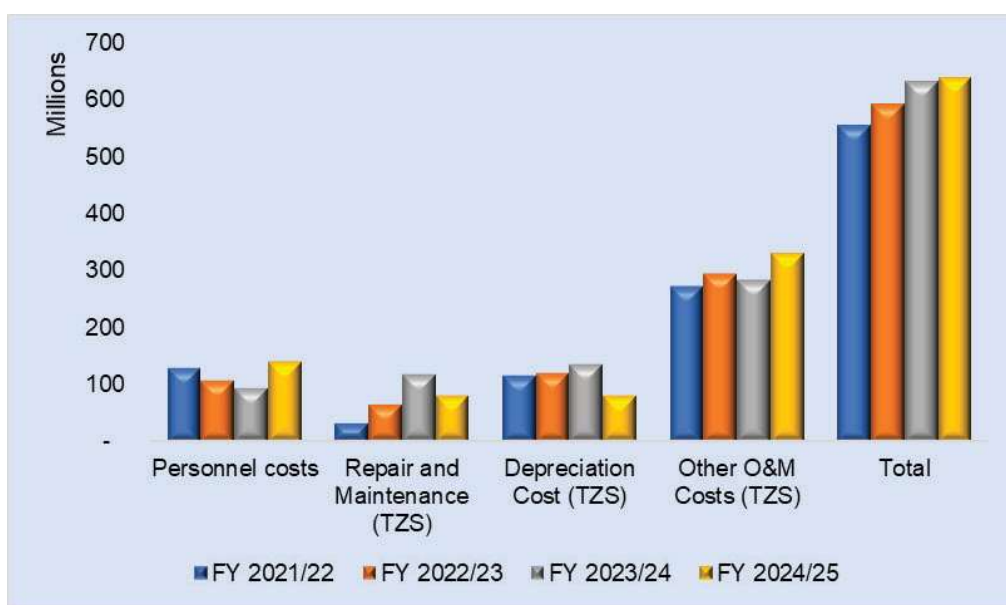


Figure 26: M&Ps' Transmission Costs



7.3.3. Songas Transmission Costs

In FY 2024/25, natural gas transmission costs for Songas decreased by 93%, from TZS 12.4 billion in FY 2023/24 to TZS 0.8 billion. The major item in the period under review was other costs amounted to 74% of all transmission costs. **Figure 27** shows the trend of Songas' natural gas transmission costs for four years.

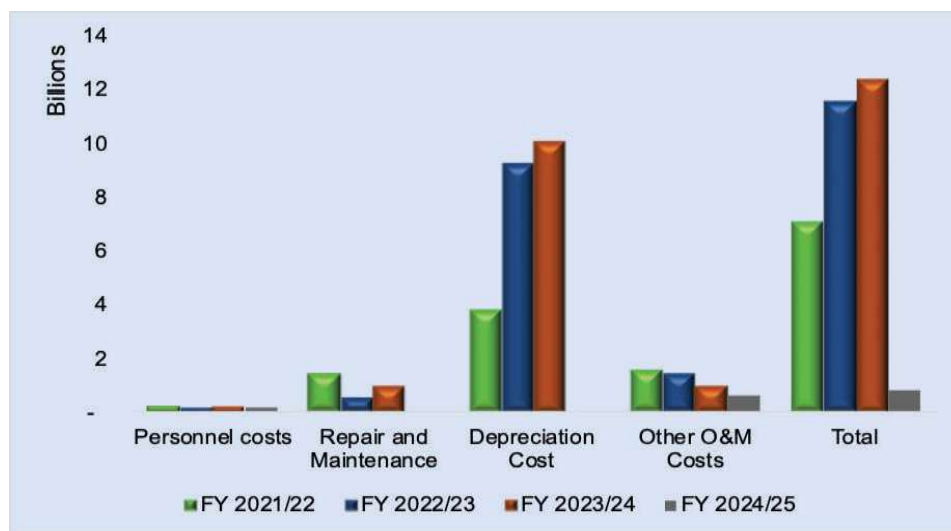


Figure 27: Songas' Transmission Cost

7.4. Distribution Costs

During the year under review, total natural gas distribution costs increased by 19% from TZS 88 billion in FY 2023/24 to TZS 105 billion in FY 2024/25. The major item in the period under review was other O&M, amounting to 74% of all distribution costs. **Figure 28** and **Figure 29** show the trend of distribution costs for four years from FY 2021/22 to FY 2024/25 by values and percentages, respectively.

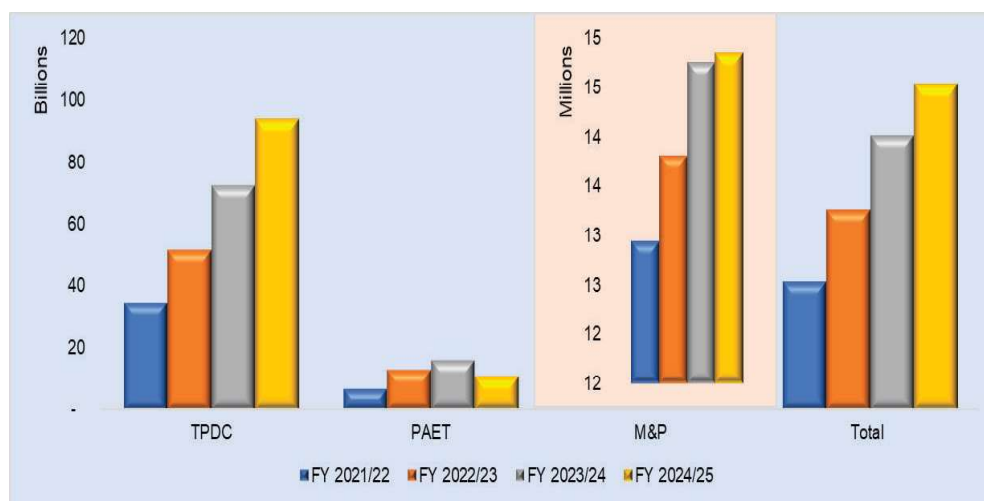


Figure 28: Total Distribution Costs of TPDC, PAET, and M&P by Values

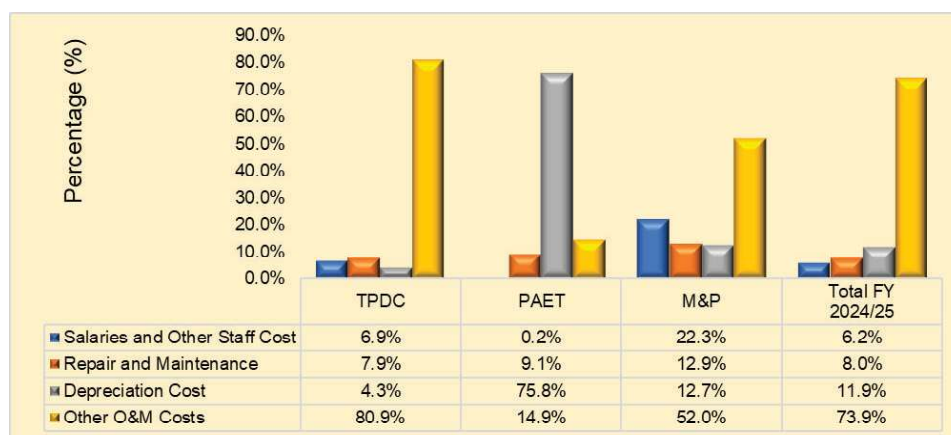


Figure 29: Distribution Costs of TPDC, PAET, and M&P by Percentage.

7.4.1. TPDC Distribution Costs

During the year under review, natural gas distribution cost for TPDC increased by 40% from TZS 52 billion in FY 2022/23 to TZS 72 billion in FY 2023/24. The major item in the period was other O&M costs, accounting for 71% of all distribution costs. **Figure 30** shows the trend of TPDC's distribution costs for four years.

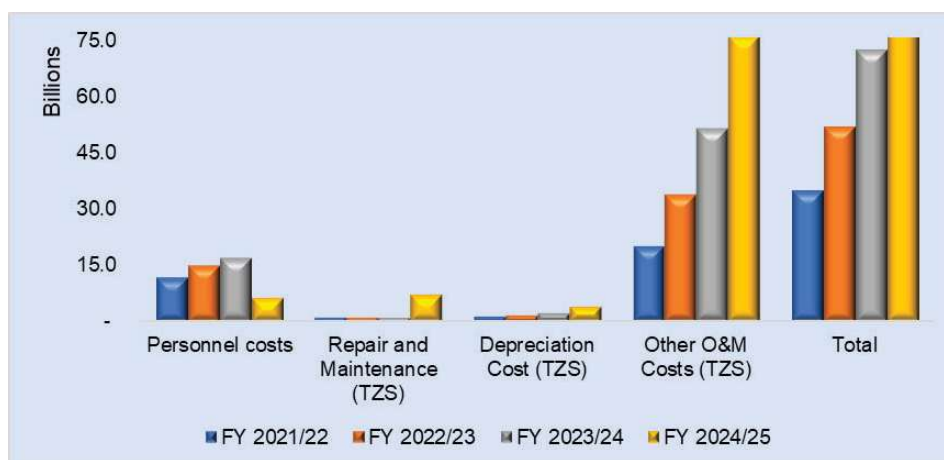


Figure 30: TPDCs' Distribution Costs

7.4.2. PAET Distribution Costs

Natural gas distribution cost for PAET decreased by 31% from TZS 16 billion in FY 2023/24 to TZS 11 billion in FY 2024/25. The major item in the period under review was depreciation expense, accounting for 76% of all distribution costs. **Figure 31** shows the trend of PAET's distribution costs for four years.



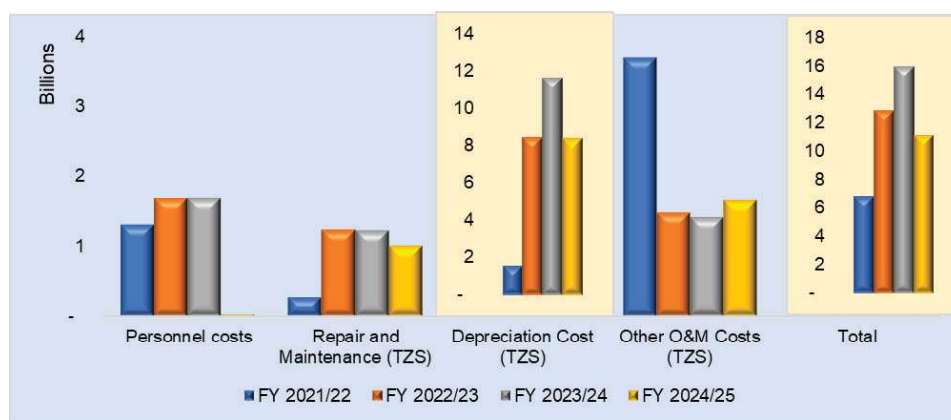


Figure 31: PAET's Distribution Costs

7.4.3. M&P Distribution Costs

Natural gas distribution cost for M&P increased by 0.7% from TZS 14.8 billion in FY 2023/24 to TZS 14.9 billion in FY 2024/25. The major item in the period under review was other O&M costs, which accounted for 52% of all distribution costs. **Figure 32** shows the trend of M&P's distribution costs for four years.

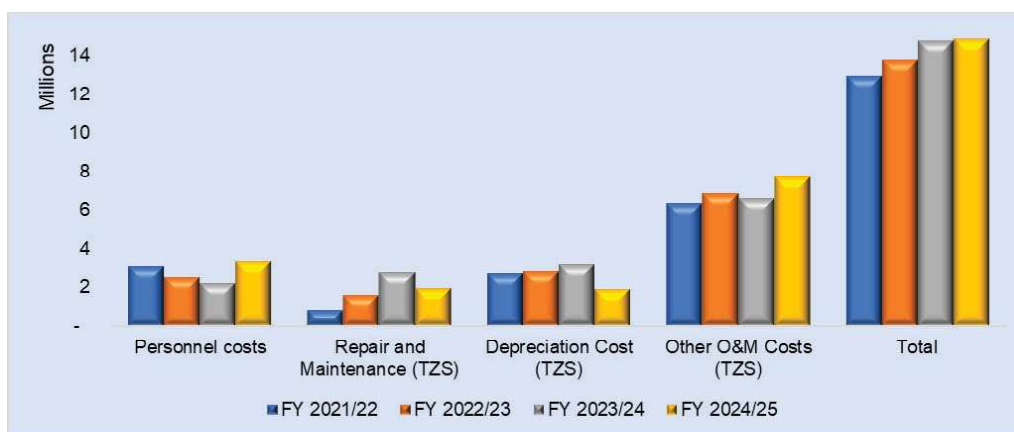


Figure 32: M&P's Distribution Costs

7.5. Ratio Analysis

A financial ratio analysis was conducted to evaluate the overall financial performance of regulated utilities. The financial performance analysis of regulated entities considered current ratio, net profit margin, and return on assets.

7.5.1. Current Ratio

During the period under review, PAET and TPDC recorded a current ratio below , while M&P recorded a ratio of , implying that utilities were not in a good position to meet short-term obligations. Songas's ratio of 1.4 reflected a good position to honour short-term obligations on time. **Figure 33** shows the trend of the current ratio for four Financial Years.

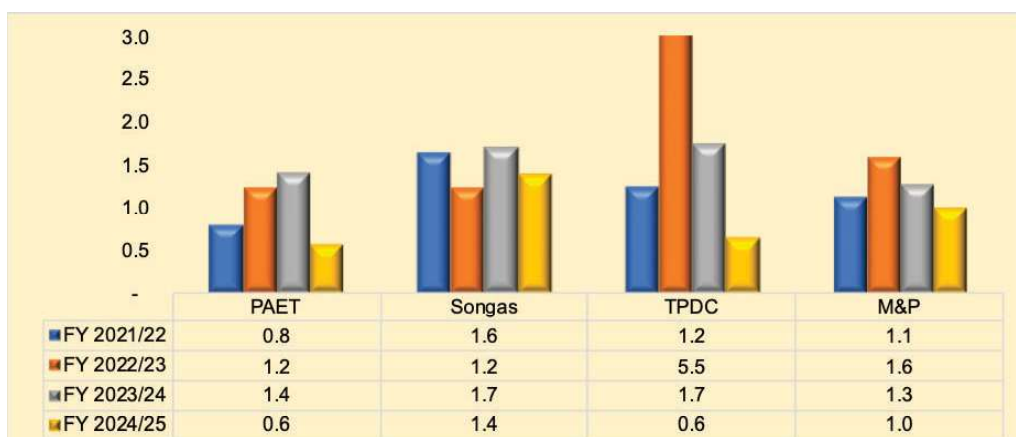


Figure 33: Current Ratios

7.5.2. Collection Efficiency

During the year under review, PAET achieved a higher collection efficiency of 112%, TPDC recorded an efficiency of 110%, including arrears, while Songas recorded 97%, and M&P had a collection efficiency of 73%. **Figure 34** illustrates a three-year trend of collection efficiency across the utilities.

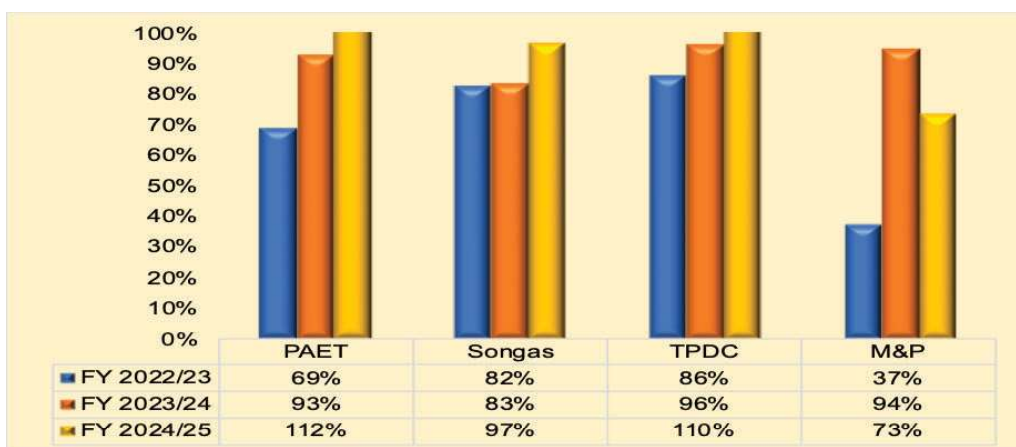


Figure 34: Collection Efficiency by Utilities



7.5.3. Accounts Receivables Lasted for More than 90 Days

During the year under review, accounts receivable that exceeded 90 days were not significant for all utilities—PAET, TPDC, and M&P. TPDC and M&P had zero receivables over 90 days. However, Songas recorded 18%, and PAET recorded 1%. In principle, accounts receivable should not remain outstanding for more than 90 days (three months) to minimise cash flow inefficiencies and the risk of bad debts. **Figure 35** illustrates a three-year trend of accounts receivable exceeding 90 days by utility.

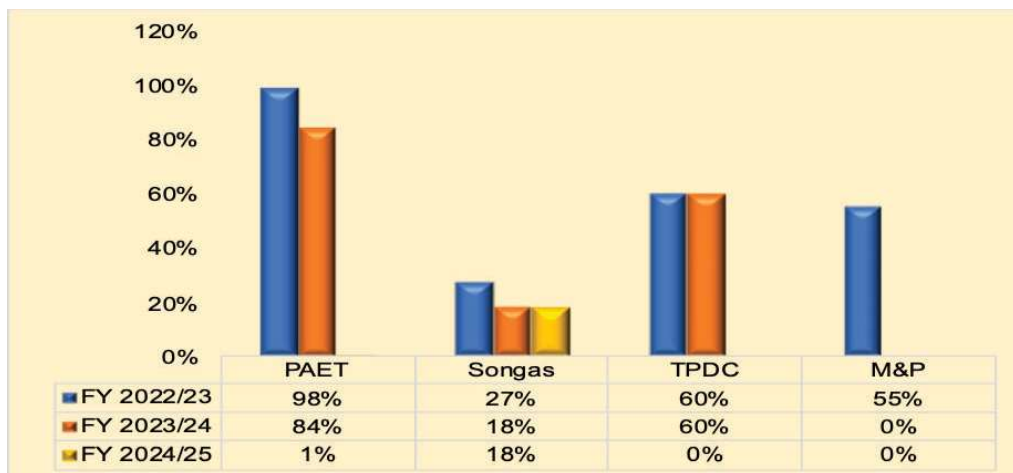


Figure 35: Accounts Receivable that Lasted for More than 90 Days

8. REGULATORY IMPACT ON THE NATURAL GAS SUB-SECTOR

The regulatory environment in the Tanzanian Natural Gas subsector during the 2024/2025 period led to significant, quantifiable expansion and service improvements, directly benefiting both service providers and end-users across transport, industrial, and household sectors. As provided in the legislation, the main focus is on improving the reliability and security of natural gas supply, enhancing safety, promoting local participation, and investing in the mid and downstream natural gas sub-sector. The Authority's efforts included monitoring compliance, issuing permits and licenses for the construction and operation of the Natural Gas Facilities, and enforcing, reviewing, and developing new regulatory tools to ensure positive impacts in the mid- and downstream natural gas sub-sector in FY 2024/25. While the long-term impact may require a study to be conducted over a period of time, the immediate regulatory impact is detailed below: -

(a) Impact of Construction Approvals and Licensing of the Natural Gas Facilities

EWURA conducted 28 pre-construction approval inspections in FY 2024/2025 (compared to 9 in the previous year), and all were granted approvals. The fast-tracking of construction approvals has driven remarkable expansion, with the number of CNG stations reaching 9 by June 2025, as compared to 5 last year, which is an increase of 80%. This regulatory efficiency has been critical for service providers, evidenced by the dramatic increase in pre-construction activities on the natural gas facilities. For service providers, this translates directly into an accelerated return on their investments.

(b) Impact of Compliance Monitoring on the Natural Gas Facilities.

The commitment to safety, integrity, transparency, and quality of services for service providers is reinforced through rigorous compliance monitoring. EWURA conducted 48 compliance inspections involving 83 facilities—well above the target of 27 inspections—achieving an impressive compliance level of 97%, up from 94.05% recorded in FY 2023/24. This strict technical and safety regulation, which includes joint inspections by EWURA, TBS, and CRB of the CNG-vehicle conversion workshops, CNG filling stations, and CNG Fuel System Inspectors, improves the integrity of the available Natural Gas Facilities, including the pipeline network, CNG filling stations, processing plants, and transmission pipelines in the Mid and Downstream sectors. This high level of regulatory compliance ultimately assures users of the long-term safety and reliability of the gas service while enhancing regulatory certainty for investment.

(c) Impact on reviewing and developing new regulatory tools to attract and promote new investments.

Regulatory efforts to attract investment in the Natural Gas sector are vital for funding the infrastructure required to expand the subsector.

- (i) **Attraction of Private Capital:** New or amended rules and continuous government efforts to improve the business climate (e.g., exemption of VAT to equipment associated with the CNG filling stations, CNG conversion kits including cylinders, and VAT chargeable to Natural Gas Supplied to CNG station for vehicles) are vital for mobilising the targeted private investment. This is evident from the increased interest from private entities in projects such as CNG, mini-LNG for virtual pipeline gas supply, and gas distribution networks, which fundamentally expand service reach beyond the current pipeline network.
- (ii) **Reduced Investor Friction:** The general push to shorten procedures and simplify regulations for starting and operating businesses aims to reduce the time and cost burden on service providers. This predictable regulatory environment increases investor confidence, which is necessary for long-term commitment to large-scale



infrastructure projects. Existence of an online application system (The Licensing and Order Information System - LOIS) where applicants for construction approvals and operational licenses can easily submit their applications to the Authority at anytime, anywhere, and the Authority's commitment to its Customer Services Charter is crucial in facilitating the linkage between the Authority and investors in delivering the services.

- (iii) **Local Content Promotion:** Regulations aimed at increasing local content also affect service providers by requiring them to build local capacity, thereby enhancing the sustainability and resilience of the service supply chain over time. In FY 2024/25, there was a noticeable increase in the involvement of Tanzanian citizens and local companies in the mid and downstream operations. It was observed that all facilities were operated by Tanzanians, reflecting a positive trend towards local participation.

(d) Economic Impacts Across Key Natural Gas Users

The integration of natural gas across several key sectors is yielding diverse and significant economic benefits. Within the transport sector, regulatory efficiency in establishing CNG infrastructure has led to shorter queues, resulting in shorter refill waiting times, direct cost savings, higher returns for motorists, and increased competitiveness and take-home income for operators. Simultaneously, the industrial sector is experiencing a boost in manufacturing competitiveness and expansion due to the availability of reliable, affordable natural gas, which lowers operating costs. The power sector has improved energy security by diversifying away from reliance on Natural gas, thereby improving the energy mix. This move protects it from international price volatility and frees up domestic resources for other valuable economic uses.

The final impact is in the household sector, where switching to natural gas provides long-term cost savings and better public health outcomes. This progress is highlighted by specific data from the Lindi region, which saw 470 new connections in FY 2024/2025, increasing the total to 677 households using piped gas. Additionally, construction is currently progressing in the Mkuranga District to connect another 530 homes, demonstrating a clear expansion of clean cooking solutions that address health risks and environmental damage linked to traditional fuels.



9. FUTURE OUTLOOK OF THE NATURAL GAS SUB-SECTOR

The commissioning of the Songo Songo natural gas field in 2004 marked the foundation and growth of Tanzania's natural gas sub-sector. Initially used mainly for power generation, its application later grew to include more industries, cooking in homes and institutions. Currently, natural gas has become an important energy source, fueling not only power plants but also industries, transport, households, and institutional cooking. The transport sector, using CNG, is the fastest-growing.

Given the global push towards net-zero emissions and the increasing energy demand, natural gas is becoming an ever more attractive and viable energy option, not only in Tanzania but worldwide. In line with its Vision 2050 goals, Tanzania will continue to promote investment in and utilisation of natural gas to stimulate key socio-economic sectors, including electricity generation, industries, transportation, and clean cooking initiatives.

The country's future in the natural gas sub-sector focuses on both short-term and long-term projects to increase natural gas volume and consumption in the domestic market. The short-term strategy includes developing onshore gas fields and the necessary natural gas infrastructure for transmission and distribution.

9.1. Natural Gas Fields Development and Production

It is expected that the two producing fields, Songo Songo and Mnazi Bay natural gas fields, will continue to deliver natural gas to the domestic market with interventions to enhance production capacity. It includes repairing existing wells to improve their output (wells workover) and implementing planned programs to drill additional wells.

The development of the Ntorya Gas Field is gaining pace following the Government's issuance of a Development Licence to the project's developers, TPDC and ARA Petroleum. They are currently carrying out several project activities, including constructing a pipeline that connects the field to the National Natural Gas Infrastructure (NNGI) via the Madimba processing plant, and laying a transmission pipeline in the Mtwara region. The Ntorya gas field is expected to commence operations in early 2026.

9.2. Natural Gas Infrastructure Development

9.2.1. Transmission pipelines

Given that transmission pipeline projects require a certain size of anchor customer(s) and a substantial up-front investment while being inflexible in capacity expansion, the Government is planning phased expansions. The initial phase aims to extend a 36-inch trunk pipeline from the Kinyerezi Gas Receiving Terminal to Chalinze in the Pwani region. This will serve the growing number of industries along the route. Additionally, the transmission pipeline from Chalinze will later be extended to Morogoro, Dodoma, and Tanga regions.

Besides its domestic expansion plans, Tanzania is actively engaging in discussions with neighbouring countries about regional natural gas trade. These negotiations involve the potential export of gas to Kenya, Uganda, and Zambia. The process of procuring a consultant to carry out Feasibility Studies for the proposed natural gas transmission pipeline from Tanzania to Uganda is nearing completion. It involves SINOPEC Petroleum Engineering Jiangnan Co. Limited, in partnership with Sunmaker Energy Uganda Limited.

9.2.2. Distribution networks

Further expansion of the natural gas distribution network is anticipated in regions near transmission and distribution lines in Pwani, Mtwara, Lindi, and Dar es Salaam. Alternative methods, known as a virtual pipeline, will also be employed for locations too remote from these primary networks. These methods include CNG and Mini Liquefied Natural Gas (Mini-LNG), depending on demand, market location, and development timelines.



Transportation of natural gas via the CNG Mobile Cascade has commenced, with some industries in the Zegereni industrial area in Kibaha district utilising natural gas for heating. It is expected to be adopted by more industries, commercial entities, and households in regions near Dar es Salaam, including Morogoro and Pwani, along the Morogoro and Bagamoyo roads.

Mini-LNG, which is suitable for longer distances compared to CNG, is expected to serve not only inland regions such as Dodoma, Mwanza, and Mbeya but also neighbouring countries as a cross-border business. A couple of Investors have already shown interest, and the Government, through EWURA, is finalising regulatory tools to govern the sub-sector.

9.2.3. CNG Stations

As demand for natural gas grows in Tanzania, the number of CNG stations is expected to increase to meet the needs of the industrial, commercial, household, and transportation sectors.

The efficiency and cost-effectiveness of CNG versus petrol cars is now a more relevant topic than ever. This debate highlights a shift in consumer priorities toward alternatives that offer lower running costs and reduced environmental impact.

More investors, including companies that operate both existing petrol and CNG stations, have expressed interest and are currently constructing new CNG Filling Stations. These developments are expected to improve the availability of CNG in many regions and to increase national production and consumption of this fuel.

9.3. Liquefied Natural Gas (LNG) Projects

The Liquefied Natural Gas (LNG) projects are regarded as a cornerstone of the long-term strategy for the Tanzanian natural gas sector. The focus is on utilising offshore gas fields to boost exports through LNG projects, while also strengthening both the domestic Tanzanian market and regional markets. Negotiations between the Government of Tanzania and offshore investors to progress these projects are ongoing.



10. ACHIEVEMENTS, CHALLENGES, AND RECOMMENDATIONS

The achievements, challenges, and recommendations for improving the midstream and downstream natural gas sub-sector during the 2024/25 financial year were as follows: -

10.1. Achievements

- (a) The number of CNG filling stations increased from five (5) in FY 2023/24 to nine (9) in FY 2024/25;
- (b) Natural gas accounted for 34.68% of the total electricity that was generated and supplied to the National Grid;
- (c) CNG vehicles consumed a total of 11,190,140.2 kg, equivalent to 87% of the total CNG produced in FY 2024/25, compared to 7,268,161.87 kg in FY 2023/24;
- (d) A total of 318 new local companies were registered in the LSSP database, representing a 15% increase compared to the previous financial year;
- (e) A total of 28 construction permits were approved, including nine (9) for CNG filling stations and 19 for natural gas supply pipelines serving industries and CNG stations;
- (f) A total of seven (7) operating licenses were issued—four (4) for CNG filling stations, two (2) for CNG supply, and one (1) for natural gas distribution;
- (g) Regulated entities continued to comply with safety and technical requirements, consistent with good industry practices, with compliance levels improving to 97%; and
- (h) Utilization of information systems such as LOIS, NPGIS, and LSSP for effective regulatory data management.

10.2. Key Challenges and Recommendations

The main challenges facing Tanzania's midstream and downstream natural gas sectors are substantial gaps in transmission and distribution infrastructure. These shortcomings severely restrict access for end-users within and beyond Dar es Salaam, Pwani, Lindi, and Mtwara regions. To overcome these access issues, EWURA, in collaboration with other Government bodies, continues to promote an environment that encourages greater private investment in pipeline distribution projects, including CNG and Mini-LNG technologies as virtual pipelines.



ANNEXES

Annex 1: Natural Gas Regulatory Tools

S/N	Citation / Title	GN Number	Date Published
1.	Petroleum Act, Cap 392, Revised Edition 2023	N/A	April, 2025
2.	The Energy and Water Utilities Regulatory Authority (EWURA) Act, Cap. 414, Revised Edition 2023	N/A	April, 2025
3.	The Petroleum (Local Content) Regulations, 2017	GN 197/2017	May 5, 2017
4.	Petroleum (Natural Gas) (Transmission and Distribution Activities) Rules, 2018	GN 176/2018	May 4, 2018
5.	The Petroleum (Natural Gas) (Storage) Rules, 2019	GN 182/2019	March 15, 2019
6.	The Petroleum (Natural Gas) (Regulatory Accounting and Reporting Standards) Rules, 2019	GN 183/2019	March 15, 2019
7.	The National (Petroleum and Natural Gas) (Information System) Rules, 2019	GN 184/2019	March 15, 2019
8.	Petroleum (Natural Gas) (Supply and Marketing Services) Rules, 2019	GN 219/2019	March 25, 2019
9.	Petroleum (Compressed Natural Gas) (Supply and Marketing Services) Rules, 2019	GN 220/2019	March 22, 2019
10.	Petroleum (Natural Gas) (Processing) Rules, 2019	GN 221/2019	March 22, 2019
11.	The Petroleum (Corporate Integrity Pledge) Regulations, 2019	GN 782/2020	Nov 1, 2019
12.	Petroleum (Natural Gas) Customer Services Charter Guidelines, 2019	N/A	2019
13.	The Petroleum (Natural Gas Midstream and Downstream) General Regulations, 2020	GN 270/2020	April, 17 2020
14.	Petroleum (Natural Gas) (Licensing Fees) Rules, 2020	GN 301/2020	May 1, 2020
15.	Petroleum (Natural Gas Pricing) Regulations, 2020	GN 353/2020	May 15, 2020
16.	The Energy and Water Utilities Regulatory Authority (Compounding of Offences) Regulations, 2020	GN 397/2020	May 29, 2020
17.	The EWURA Consumer Complaints Settlement Rules, 2020	GN 428/2020	June 5, 2020
18.	The Energy and Water Utilities Regulatory Authority (Electricity and Natural Gas) (Tariff Application and Rate Setting) Rules, 2021	GN 396/2021	May 21, 2021
19.	The developed tools include the Petroleum (Natural Gas) Midstream and Downstream Investment Guidelines 2022	N/A	2022
20.	Protection of Underground Infrastructure in Shared Wayleave Guidelines, 2022	N/A	2022



Annex 2: Natural Gas TBS Standards

S/N	Code Number	Year	Title and Scope
1.	TZS 2255: 2018 - ISO 3183: 2012	2018	Petroleum and natural gas industries — Steel pipe for pipeline transportation systems: Specifies requirements for the manufacture of two product specification levels (PSL 1 and PSL 2) of seamless and welded steel pipes for use in pipeline transportation systems in the petroleum industry. ICS: 75.200
2.	TZS 2672:2021/ISO 16440:2016	2021	Petroleum and natural gas industries — Pipeline transportation systems — Design, construction, and maintenance of steel-cased pipelines Specifies requirements, including corrosion protection, for the design, fabrication, installation, and maintenance of steel-cased pipelines for pipeline transportation systems in the petroleum industry. 77.140 ISO 16440:2016
3.	TZS 2673:2021/ISO 16708:2006	2021	Petroleum and natural gas industries — Pipeline transportation systems — Reliability-based limit state methods Specifies the functional requirements and principles for design, operation, and requalification of pipelines in the petroleum and natural gas industries using reliability-based limit state methods. 75.200 ISO 16708:2006
4.	TZS 1970:2017- ISO 15649: 2001	2017	Petroleum and natural gas industries — Piping Specifies the requirements for design and construction of piping for the petroleum and natural gas industries, including associated inspection and testing. ICS: 75.200
5.	TZS 1307: 2024/ISO 11439: 2013	2024	Gas cylinders - high-pressure cylinders for the on-board storage of natural gas as a fuel for automotive vehicles Specifies minimum requirements for serially produced lightweight refillable gas cylinders intended only for the on-board storage of high-pressure compressed natural gas as a fuel for automobiles. ICS 43.060.40
6.	TZS 2809:2022/ ISO 4978:2018	2022	Steel sheet and strip for welded gas cylinders Specifies the characteristics of hot-rolled steel sheet and strip with a thickness up to 12 mm, inclusive of the non-alloyed steels listed in Table 1, which are intended for welded gas cylinders. ICS 77.140.30 ISO 4978:2018
7.	TZS 2347: 2020-ISO 16923: 2016 (1st Ed)	2020	Natural gas fuelling stations — CNG stations for fuelling vehicles: Covers the design, construction, operation, inspection, and maintenance of stations for fuelling compressed natural gas (CNG) to vehicles, including equipment, safety, and control devices. 75.200 16923: 2016
8.	TZS 2267:2017	2018	General-purpose natural gas — Specification: Prescribes requirements, methods of sampling and testing, calculation, and interchangeability indices of natural gas for general-purpose use. ICS: 75.060



S/N	Code Number	Year	Title and Scope
9.	TZS 2271-3: 2020- ISO 6974-3: 2018	2020	Natural gas — Determination of composition with defined uncertainty by gas chromatography — Part 3: Determination of hydrogen, helium, oxygen, nitrogen, carbon dioxide, and hydrocarbons up to Describes the precision that can be expected from the gas chromatographic method that is set up in accordance with ISO 6974-1. The stated precision provides values for the magnitude of variance. ICS: 75.060
10.	TZS 2275: 2020- ISO 23874: 2006	2020	Natural gas — Gas chromatographic requirements for hydrocarbon dewpoint calculation Describes the performance requirements for analysis of treated natural gas of transmission or pipeline quality in sufficient detail so that the hydrocarbon dewpoint temperature can be calculated. ICS: 75.060
11.	TZS 2276: 2020- ISO 19739: 2004	2020	Natural gas — Determination of sulfur compounds using gas chromatography Specifies the determination of hydrogen sulfide, carbonyl sulfide, C1 to C4 thiols, sulfides, and tetrahydrothiophene (THT) using gas chromatography (GC). ICS: 75.060
12.	TZS 1790:2016. ISO 23550:2011	2016	Safety and control devices for gas burners and gas-burning appliances - General requirements. Specifies safety, constructional, and performance requirements, as well as testing of safety control or regulating devices, sub-assemblies, or fittings (hereafter referred to as controls) for burners. ICS: 27.060.20
13.	TZS 1792:2016. ISO 23551-3:2005	2016	Safety and control devices for gas burners and gas-burning appliances — Particular requirements — Gas/air ratio controls, pneumatic type. Specifies the safety, construction, and performance requirements for gas/air ratio controls, pneumatic type (hereafter referred to as “ratio control”), for inlet pressures up to and including. ICS: 27.060.20
14.	TZS 1791:2016. ISO 23551-1:2012	2016	Safety and control devices for gas burners and gas-burning appliances - Particular requirements – Part 1: Automatic and semi-automatic valves. Specifies safety, constructional, and performance requirements and testing of automatic and semi-automatic shut-off valves for gas burners, gas appliances, and appliances of similar use. ICS: 27.060.20
15.	TZS 1791-2: 2024- ISO 23551-2: 2018	2024	Safety and control devices for gas burners and gas-burning appliances — Particular requirements — Part 2: Pressure regulators Specifies safety, construction, performance, and testing requirements for pressure regulators and pneumatic gas/air ratio pressure regulators intended for use with gas burners and gas-burning. ICS: 27.060.20 ISO 23551-2: 2018



S/N	Code Number	Year	Title and Scope
16.	TZS 1791-4: 2024- ISO 23551-4: 2018	2024	Safety and control devices for gas burners and gas-burning appliances — Particular requirements — Part 4: Valve-proving systems for automatic shut-off valves Specifies safety, constructional, and performance requirements of valve-proving systems (VPS), intended for use with gas burners and gas-burning appliances. It also describes the test procedure. ICS: 27.060.20 ISO 23551-4: 2018
17.	TZS 1791-5: 2024- ISO 23551-5: 2023	2024	Safety and control devices for gas burners and gas-burning appliances — Particular requirements — Part 5: Manual gas valves Specifies safety, constructional, and performance requirements for manual gas valves intended for use with gas burners and gas-burning appliances, hereafter referred to as ‘valves’, unless otherwise specified. ICS: 27.060.20 ISO 23551-5: 2023
18.	TZS 1791-6: 2024- ISO 23551-6: 2021	2024	Safety and control devices for gas burners and gas-burning appliances — Particular requirements — Part 6: Thermoelectric flame supervision controls Specifies safety, constructional, performance, and testing requirements for thermoelectric flame supervision controls, energized by a thermocouple, intended for use with gas burners and gas-burning appliances, hereafter referred to as “controls”. ICS: 27.060.20 ISO 23551-6: 2021
19.	TZS 1791-8: 2024- ISO 23551-8: 2016	2024	Safety and control devices for gas burners and gas-burning appliances — Particular requirements — Part 8: Multifunctional controls Specifies the safety, construction, and performance requirements for multifunctional controls intended for use with gas burners, gas appliances, and similar use, hereafter referred to as “MFC”. ICS: 27.060.20 ISO 23551-8: 2016
20.	TZS 1791-9: 2024- ISO 23551-9: 2022	2024	Safety and control devices for gas burners and gas-burning appliances — Particular requirements — Part 9: Mechanical gas thermostats Specifies safety, construction, performance, and testing requirements for mechanical gas thermostats intended for use with gas burners and gas-burning appliances, hereafter referred to as “thermostats”. ICS: 27.060.20 ISO 23551-9: 2022
21.	TZS 1791-10: 2024- ISO 23551-10: 2016	2024	Safety and control devices for gas burners and gas-burning appliances — Particular requirements — Part 10: Vent valves Specifies the safety, design, construction, and performance requirements and testing for automatic vent valves (hereafter referred to as “valves”) for use with gas burners, gas appliances burning one or more gaseous fuels. ICS: 27.060.20 ISO 23551-10: 2016



S/N	Code Number	Year	Title and Scope
22.	TZS 1187-1:2024/ISO 15500-1:2015	2024	Road vehicles — Compressed natural gas (CNG) fuel system components — Part 1: General requirements and definitions This part of ISO 15500 specifies general requirements and definitions of compressed natural gas fuel system components, intended for use on the types of motor vehicles as defined in ISO 383. ICS 43.060.40 ISO 15500-1:2015
23.	TZS 1187 (Part 2): 2023 (2nd Ed) ISO 15500-2:2016	2023	Road vehicles — Compressed natural gas (CNG) fuel system components - Part 2: Performance and general test methods Specifies performance and general test methods for compressed natural gas (CNG) fuel system components intended for use on the types of motor vehicles defined in ISO 3833. ICS: 43.060.40 ISO 15500-2:2016
24.	TZS 1187-3/ISO 15500-3:2020	2024	Road vehicles — Compressed natural gas (CNG) fuel system components — Part 3: Check valve This document specifies tests and requirements for the check valve; a compressed natural gas (CNG) fuel system component intended for use on the types of motor vehicles defined in ISO 3833. ICS 43.060.40 ISO 15500-3:2020
25.	TZS 1187-4:2024-ISO 15500-4:2020	2024	Road vehicles — Compressed natural gas (CNG) fuel system components — Part 4: Manual valve Specifies tests and requirements for the manual valve, a compressed natural gas (CNG) fuel system component intended for use on the types of motor vehicles defined in ISO 3833. ICS: 43.060.40 ISO 15500-4:2020
26.	TZS 1187 (Part 5): 2024 (2nd Ed) - ISO 15500-5: 2020	2024	Road vehicles — Compressed natural gas (CNG) fuel system components — Part 5: Manual cylinder valve Specifies tests and requirements for the manual cylinder valve, a compressed natural gas (CNG) fuel system component intended for use on the types of motor vehicles defined in ISO 3833. ICS 43.060.40 ISO 15500-5:2020
27.	TZS 1187 (Part 6): 2024 (2nd Ed) -ISO 15500-6: 2020	2024	Road vehicles — Compressed natural gas (CNG) fuel system components — Part 6: Automatic valve Specifies tests and requirements for the automatic valve, a compressed natural gas (CNG) fuel system component intended for use on the types of motor vehicles defined in ISO 3833. ICS 43.060.40 ISO 15500-6:2020
28.	TZS 1187 (Part 7): 2024 (2nd Ed) -ISO 15500-7: 2015	2024	Road vehicles — Compressed natural gas (CNG) fuel system components — Part 7: Gas injector Specifies tests and requirements for the gas injector and/or fuel rail, a compressed natural gas fuel system component intended for use on the types of motor vehicles defined in ISO 3833. ICS: 43.060.40 ISO 15500-7:2015



S/N	Code Number	Year	Title and Scope
29.	TZS 1187 (Part 8): 2024 (2nd Ed) - ISO 15500-8: 2015	2024	Road vehicles — Compressed natural gas (CNG) fuel system components — Part 8: Pressure indicator Specifies tests and requirements for the pressure indicator, a compressed natural gas fuel system component intended for use on the types of motor vehicles defined in ISO 3833. ICS 43.060.40 ISO 15500-8:2015
30.	TZS 1187 (Part 9): 2024 (2nd Ed)- ISO 15500-9: 2020	2024	Road vehicles- Compressed Natural Gas (CNG) fuel system components - Part 9: Pressure regulator Specifies tests and requirements for the pressure regulator, a compressed natural gas (CNG) fuel system component intended for use on the types of motor vehicles defined in ISO 3833. ICS 43.060.40 ISO 15500-9:2020
31.	TZS 1187 (Part 10): 2024 (2nd Ed)- ISO 15500-10: 2015	2024	Road vehicles — Compressed natural gas (CNG) fuel system components — Part 10: Gas-flow adjuster Specifies test and requirements for the gas flow adjuster, a compressed natural gas fuel system component intended for use on the types of motor vehicles defined in ISO 3833. ICS: 43.060.40 ISO 15500-10:2015
32.	TZS 1187 (Part 11): 2024 (2nd Ed) -ISO 15500-11: 2015	2024	Road vehicles — Compressed natural gas (CNG) fuel system components — Part 11: Gas/air mixer Specifies test and requirements for the gas/ air mixer, a compressed natural gas fuel system component intended for use on all types of motor vehicles defined in ISO 3833. ICS 43.060.40 ISO 15500-11:2015
33.	TZS 1187 (Part 12): 2024 (2nd Ed) -ISO 15500-12: 2015	2024	Road vehicles — Compressed natural gas (CNG) fuel system components—Part12:Pressure relief valve (PRV) Specifies test and requirements for the pressure relief valve (PRV), a compressed natural gas fuel system component intended for use on all types of motor vehicles defined in ISO3833. ICS 43.060.40 ISO 15500-12:2015
34.	TZS 1187 (Part 13): 2024 (2nd Ed)- ISO 15500-13:2012	2024	Road vehicles — Compressed natural gas (CNG) fuel system components — Part 13: Pressure relief device (PRD) Specifies tests and requirements for the pressure relief device (PRD), a compressed natural gas (CNG) fuel system component intended for use on the types of motor vehicles defined in ISO 383. ICS 43.060.40 ISO 15500-13:2023
35.	TZS 1187 (Part 14): 2024 (2nd Ed)- ISO 15500-14: 2020	2024	Road vehicles — Compressed natural gas (CNG) fuel system components — Part 14: Excess flow valve Specifies tests and requirements for the excess flow valve, a compressed natural gas (CNG) fuel system component intended for use on the types of motor vehicles defined in ISO 3833. ICS 43.060.40 ISO 15500-14:2020



S/N	Code Number	Year	Title and Scope
36.	TZS 1187 (Part 15): 2024 (2nd Ed) - ISO 15500-15: 2001	2024	Road vehicles — Compressed natural gas (CNG) fuel system components — Part 15: Gas-tight housing and ventilation hose Specifies tests and requirements for the gas-tight housing and ventilation hose, compressed natural gas fuel system components intended for use on the types of motor vehicles defined in ISO. ICS 43.060.40 ISO 15500-15:2015
37.	TZS 1187 (Part 16): 2024 (2nd Ed) -ISO 15500-16: 2020	2024	Road vehicles — Compressed natural gas (CNG) fuel system components — Part 16: Rigid fuel line in stainless steel Specifies tests and requirements for the rigid fuel line in stainless steel, a compressed natural gas (CNG) fuel system component, in accordance with ISO 1127, intended for use on the types of motor vehicles defined in ISO 3833. ICS 43.060.40 ISO 15500-16:2020
38.	TZS 1187 (Part 17): 2024 (2nd Ed)- ISO 15500-17: 2021	2024	Road vehicles — Compressed natural gas (CNG) fuel system components — Part 17: Flexible fuel line Specifies tests and requirements for the flexible fuel line, a compressed natural gas (CNG) fuel system component in accordance with SAE J517 (100R8 hose) or JIS B 8362, intended for use on the types of motor vehicles defined in ISO 3833. ICS 43.060.40 ISO 15500-17:2021
39.	TZS 1187-18:2024 (1st Ed) - ISO 15500-18:2020	2024	Road vehicles — Compressed natural gas (CNG) fuel system components — Part 18: Filter Specifies tests and requirements for the filter, a compressed natural gas (CNG) fuel system component intended for use on the types of motor vehicles defined in ISO 3833. ICS: 43.060.40 ISO 15500-18:2020
40.	TZS 1187-19:2024 (1st Ed) - ISO 15500-19:2020	2024	Road vehicles — Compressed natural gas (CNG) fuel system components — Part 19: Fittings Specifies tests and requirements for fittings, compressed natural gas (CNG) fuel system components intended for use on the types of motor vehicles defined in ISO 3833. ICS: 43.060.40 ISO 15500-19:2020



Annex 3: Natural Gas Construction Approvals

S/N	Applicant Name	Approval No.	Date of Issue	Type of Construction Approval
1.	Energo Tanzania Limited of P.O. Box 653, Dar es Salaam	NGCA-2024-05	27-Sep-24	Construct a Compressed Natural Gas Mother and Filling Station for supplying natural gas to the public
2.	Pan-African Energy (T) Limited P. O. Box 80139 Dar es Salaam	NGCA-2024-06	01-Nov-24	Construct natural gas distribution facilities for supplying natural gas to Aluminium Africa Limited new production line
3.	Victoria Service Station Limited P.O. Box 75467, Dar es Salaam	NGCA-2024-07	01-Nov-24	Construct natural gas refuelling station along Nyerere Road on Plot Number 112, Kipawa Area, Dar es Salaam
4.	Rafiki CNG Station and Conversion Centre Limited P. O. Box 22745 Dar es Salaam	NGCA-2024-08	29-Nov-24	Construct a Compressed Natural Gas Mother and Filling Station for supplying natural gas to the public
5.	Puma Energy Tanzania Limited P.O. Box 9043, Dar es Salaam	NGCA-2024-09	29-Nov-24	Construct natural gas refuelling station at Plot No. 1C/1, Mabibo Area, along Mandela Road, Ubungo Municipality in Dar es Salaam City
6.	Puma Energy Tanzania Limited P.O. Box 9043, Dar es Salaam	NGCA-2024-10	29-Nov-24	Construct a Compressed Natural Gas Mother and Filling Station at Plot No. P40264, Kunduchi, Salasala Area, Wazo Ward, Kinondoni Municipality in Dar es Salaam Region
7.	Puma Energy Tanzania Limited P.O. Box 9043, Dar es Salaam	NGCA-2024-11	31-Dec-24	Construct natural gas receiving station within the premises of Alliance One Tobacco Tanzania Limited located at Kingolwira Ward in Morogoro Municipality
8.	Tanzania States Natural Gas Holdings Company Limited P.O. Box 77819, Dar es Salaam	NGCA-2025-01	31-Jan-25	Construct a Compressed Natural Gas Mother and Filling Station at Plot No. P46968, Kunguru Street, Goba Ward, Ubungo Municipality
9.	Pan-African Energy (T) Limited P.O. Box 80139 Dar es Salaam	NGCA-2025-02	31-Jan-25	Construct natural gas distribution facilities for supplying natural gas to Victoria Service Station proposed natural gas refuelling station located along Nyerere Road, Kipawa Area, Dar es Salaam City
10.	Tanzania Petroleum Development Corporation P. O. Box 1191 Dodoma	NGCA-2025-03	31-Jan-25	Construct natural gas distribution facilities for supplying natural gas to Dar es Salaam University College of Education located at Chang'ombe Area in Temeke District
11.	Tanzania Petroleum Development Corporation P. O. Box 1191 Dodoma	NGCA-2025-04	31-Jan-25	Construct natural gas distribution facilities for supplying natural gas to Mlimani City Villa located at Mlimani City Area in Ubungo



S/N	Applicant Name	Approval No.	Date of Issue	Type of Construction Approval
12.	Tanzania Petroleum Development Corporation P. O. Box 1191 Dodoma	NGCA-2025-05	31-Jan-25	Construct natural gas distribution facilities for supplying natural gas to the TPDC new CNG Mother Station located at University of Dar es Salaam City Area in Ubungu
13.	Tanzania Petroleum Development Corporation P. O. Box 1191 Dodoma	NGCA-2025-06	31-Jan-25	Construct natural gas distribution facilities for supplying natural gas to household customers located at Mnazi Mmoja Area in Lindi
14.	Tanzania Petroleum Development Corporation P. O. Box 1191 Dodoma	NGCA-2025-07	31-Jan-25	Construct natural gas distribution facilities for supplying natural gas to Puma CNG Filling Station located at Tangi Bovu Area, Mbezi Beach in Kinondoni
15.	Tanzania Petroleum Development Corporation P. O. Box 1191 Dodoma	NGCA-2025-08	31-Jan-25	Construct natural gas distribution facilities for supplying natural gas to TAQA Dalbit (T) Limited CNG Filling Station located along Sam Nujoma Road in Ubungu
16.	Tanzania Petroleum Development Corporation P. O. Box 1191 Dodoma	NGCA-2025-09	27-Feb-25	Construct natural gas distribution facilities for supplying natural gas to PUMA Energy CNG Mother Station located at Tegeta IPTL Area in Kinondoni
17.	Pan-African Energy (T) Limited P.O. Box 80139 Dar es Salaam	NGCA-2025-10	27-Feb-25	Construct natural gas distribution facilities for supplying natural gas to Rafiki One proposed natural gas refuelling station located along Mandela Road, Tabata Area, Dar es Salaam City
18.	Kinglion Investment Company P.O. Box 33596 Dar es Salaam	NGCA-2025-11	27-Feb-25	Construct a natural gas receiving station within the premises of its roofing factory located at Zegereni Industrial Area, Kibaha District in Pwani Region
19.	Nat Energy Company Tanzania Limited P.O. Box 8111, Dar es Salaam	NGCA-2025-12	27-Mar-25	Construct a natural gas refuelling station on Plot Number 4, Block 'F' Uvumba Street along Kibada Road, Kigamboni Municipality in Dar es Salaam
20.	Puma Energy Tanzania Limited P.O. Box 9043, Dar es Salaam	NGCA-2025-13	27-Mar-25	Construct a natural gas refuelling station within the premises of its existing petrol station located at Plot No. 1, Block "D", Mbezi Tangi Bovu Area, along Bagamoyo Road, Kinondoni Municipality in Dar es Salaam City
21.	Tanzania Petroleum Development Corporation P.O. Box 1191 Dodoma	NGCA-2025-14	27-Mar-25	Construct natural gas distribution facilities for supplying natural gas to 529 household customers located at Mkuranga Kisemvule in Pwani Region



S/N	Applicant Name	Approval No.	Date of Issue	Type of Construction Approval
22.	Rashal Energies Limited	NGCA-2025-15	28-Mar-25	Construct natural gas distribution facilities for supplying natural gas to households and industrial customers, as well as CNG filling station at Mbagala in Dar es Salaam city
23.	Tanzania Petroleum Development Corporation P.O. Box 1191, Dodoma	NGCA-2025-16	28-Mar-25	Construct natural gas distribution facilities for supplying natural gas to Energo's Limited new CNG Mother Station located at Mikocheni Area, along Coca Cola Road in Kinondoni Municipality
24.	Tanzania Petroleum Development Corporation P.O. Box 1191, Dodoma	NGCA-2025-17	28-Mar-25	Construct distribution facilities for supplying natural gas to BQ Contractors' Limited new CNG Mother Station located at Goba Area in Kinondoni Municipality
25.	Pan-African Energy (T) Limited P.O. Box 80139 Dar es Salaam	NGCA-2025-18	25-Apr-25	Construct natural gas distribution facilities for supplying natural gas to customers located along Mandela Road, Tabata Area, Dar es Salaam City
26.	Pan-African Energy (T) Limited P.O. Box 80139 Dar es Salaam	NGCA-2025-19	25-Apr-25	Construct natural gas distribution facilities for supplying natural gas to PUMA Energy Tanzania Limited CNG Filling Station located along Mandela Road, Mabibo Area, Dar es Salaam City
27.	Tanzania Petroleum Development Corporation P. O. Box 1191 Dodoma	NGCA-2025-20	30-May-25	Construct distribution facilities for supplying natural gas to Tan-Health Limited new CNG Mother Station located at Mbezi Africana Area in Kinondoni Municipality
28.	Tan Health Limited P.O. Box 13548, Dar es Salaam	NGCA-2025-21	30-May-25	Construct a natural gas refuelling station at Plot No. 583, Block H, Mbezi Beach, Kinondoni Municipality, Dar es Salaam

Source: EWURA



Annex 4: Existing Natural Gas Licenses

No.	Licencee Name	Location	Type of license	Capacity (MMscfd)	Duration (Years)	License No.	Date of Issue	Date of Expiry	Remarks
1.	GASCO (TPDC)	Mtwara-Dar	Transmission	784	25	NGTL-2021-001	31 st May 2021	31 st Aug 2040	Active
2.	GASCO (TPDC)	Mtwara	Processing	210	25	NGPL-2021-001	31 st May 2021	31 st Aug 2040	Active
3.	GASCO (TPDC)	SongoSongo	Processing	140	25	NGPL-2021-002	26 th Jul 2021	15 th Aug 2041	Active
4.	Anric Gas Technology (T) Co. Ltd	D'Salaam	CNG Filling Station	1,000	5	CNGFSL-2021-001	30 th Aug 2021	29 th Aug 2026	Active
5.	TAQA Dalbit (T) Limited	D'Salaam	CNG Filling Station	3,200	5	CNGFSL-2023-001	6 th Nov 2023	5 th Nov 2028	Active
6.	Anric Gas Technology (T) Co. Ltd	D'Salaam	CNG Supply License	18	5	CNGSL-2024-001	30 th May 2024	29 th May 2029	Active
7.	Dangote Cement Limited	Mtwara	CNG Own Use	19.44m ³	5	CNGOL-2021.-001	6 th Jul 2021	5 th Jul 2026	Active
8.	Dangote Cement Limited	Mkuranga	CNG Own Use	12m ³	5	CNGOL-2023 - 001	1 st Dec 2023	30 th Nov 2028	Active

Annex 5: List of regulated entities and their scope of operations

S/N	Name	Scope of regulated service	Location	Year Started
1.	PAET	Distribution Network	Dar es Salaam	2004
2.	Songas Ltd	Processing Plant	Songosongo (Lindi)	2004
		Transmission Pipeline	Songosongo to Dar es Salaam	2004
3.	M&P	Processing Plant	Mnazi Bay (Mtwara)	2009
		Transmission Pipeline	Mnazi Bay to TANESCO in Mtwara	2009
4.	TPD	Processing Plant	Madimba (Mtwara)	2015
		Processing Plant	Songo Songo (Lindi)	2016
		Transmission Pipeline	Mtwara to Dar es Salaam	2015
		Marine Transmission Pipeline	Songo Songo to Somanga Fungu gas junction	2016
		Distribution Network	Mtwara, Lindi, Coastal and Dar es Salaam	2016
5.	GASCO	Operator on TPDC Natural gas Facilities (Processing Plant, Transmission pipeline and Distribution Network)	Mtwara, Lindi, Coastal and Dar es Salaam	2015
6.	PAET	CNG Filling Station	Ubungu, Dar es Salaam	2009
7.	Dangote Cement Factory	Compressed Natural Gas Operations and CNG Filling Station (Own Use)	Mtwara	2021
8.	Anric Gas Technology Limited	CNG Filling Station	Tazara area, Dar es Salaam	2021
9.	TAQA Dalbit (T) Limited	CNG Filling Station	Kipawa, Ilala, Dar es Salaam.	2023



Annex 6: Capacity and length of the existing Natural Gas Transmission Pipelines

S/N	Pipeline Name	Pipeline Route	Length (km)	Diameter (inches)	Maximum Operating Pressure (Bar)	Capacity (MMscfd)	Network Operator
1.	National Natural Gas Pipeline Infrastructure (NNPI)	Madimba (Mtwara) to Kinyerezi (Dar es Salaam) via Somanga Fungu	477	36	80	784	GASCO
		Songo Songo Island to Somanga Fungu in Lindi	29	24	80		
		Kinyerezi to Tegeta in Dar es Salaam	27.5	16	80		
2.	Songas Pipeline	Songo Songo Island (Lindi) to Somanga Fungu	26	12	90	105	Songas
		Somanga Fungu (Lindi) to Ubungu (Dar es Salaam)	206	16	90		
		Ubungu to Wazo Hill in Dar es Salaam	15.6	8	55		
3.	M&P Pipeline	Mnazi Bay to TANESCO Power Plant in Mtwara	27.5	8	90	80	M&P
Total			793			969	



Annex 7: Number of installed and tested Cathodic Protection (CP) Test Points

Transmission Pipeline Segment	Number of installed Cathodic Protection test points	CP test points planned for testing	Required range of Voltage reading	Tested CP test points	CP test points complied	Mal-functioned CP test points Reported	CP test points complied (%)	Target (%)
TPDC (From SS & Madimba to Wazo hill)	567	550	850mV - 1200mV	540	530	10	96.3	100
M&P	18	18	2.0mV - 2.5mV	18	18	0	100	100
SONGAS	228	228	850mV - 1200mV	7	7	0	3	100

Source: PAET & TPDC



Annex 8: List of Household customers connected with gas (TPDC)

S/N	Gas Supply Region	Area	Date of installation (Year)	Number of Households connected	% Usage	Installed capacity of the network
1.	Mtwara	Bandari	2019	125	78.4	10
2.	Mtwara	Kiyangu, Lilungu, Mtwara Tech.	2021	300		10
3.	Dar es Salaam	Mikocheni	2013	70	81.94	15
4.	Dar es Salaam	Mikocheni, Mlalakua and UDSM	2019	140		15
5.	Lindi	Mnazimmoja	2020	209		15
6.	Dar es Salaam	UDSM	2022	100	6	15
		Sinza	2022	226	73	
		Kurasini	2022	344	87.8	
TOTAL				1,514		



Annex 9: List of commercial and institutional customers connected to the gas network

S/N	Name of customer	Average consumption (MMscfd)	Annual consumption (MMscf)	Usage	Location	Supplier/ Operator
1.	Tanruss Investments Limited (Serena Hotel)	0.024	8.46	Boiler + Burner	Posta	PAET
2.	Tanzania Prisons Services (Keko Prison)	0.003	1.04	Heating (Kitchen)	Keko	PAET
3.	Mtwara tech			Cooking	Mtwara	TPDC/GASCO
4.	Mtwara college			Cooking	Mtwara	TPDC/GASCO
5.	Cafeteria 1			Cooking	Dar es Salaam	TPDC/GASCO
6.	Giraffe Beach Hotel		0.001	Cooking	Dar es Salaam	TPDC/GASCO
7.	Ramada Resort Hotel		0.001	Cooking	Dar es Salaam	TPDC/GASCO
8.	Jangwani Sea Breeze Resort		0.001	Cooking	Dar es Salaam	TPDC/GASCO
9.	Landmark Beach Resort		0.001	Cooking	Dar es Salaam	TPDC/GASCO
10.	Whitesand Beach Resort		0.001	Cooking	Dar es Salaam	TPDC/GASCO
11.	Serene Beach Resort		0.001	Cooking	Dar es Salaam	TPDC/GASCO



Annex 10: List of natural gas customers in thermal power generation using natural gas

S/N	Name of power generation customer	Year of installation	Installed capacity)	Maximum consumption (MMscfd)	Average consumption (MMscfd)	Gas odorization status	Location	Supplier
1.	Songas		180	46	7.90	Odorized	Ubungo	PAET
2.	KINYEREZI I	2015	150	30	13.26	Not odorized	DSM	TPDC/ GASCO
3.	KINYEREZI I EXTENSION	2015	185	37	NA	Not odorized	DSM	TPDC/ GASCO
4.	KINYEREZI II	2016	185	37	35	Not odorized	DSM	TPDC/ GASCO
5.	UBUNGO I		102	22	12.4	Odorized	Ubungo	PAET
6.	UBUNGO II	2015	129	30	25	Not odorized	DSM	TPDC/ GASCO
7.	UBUNGO IIIA		100	22	18.4	Odorized	Ubungo	PAET
8.	UBUNGO IIIB		20	4	2.5	Odorized	Ubungo	PAET
9.	TEGETA 45		45	10	5.6	Odorized	Tegeta	PAET
10.	TANESCO - Mtwara Plant	2006	24	2.4	2.4	Not odorized	Mtwara	M&P
11.	Somanga Fungu	2010	7.5	7.74	0.14	Odorized	DSM	SONGAS
12.	Mtwara Gas Power Plant II	2024	20	5	2.82	Not odorized	Mtwara	TPDC/ GASCO
Total Installed Capacity (MW)			1,198.82					



Annex 11: List of Industrial customers connected to the gas network

S/N	Name of customer	Average consumption (MMscfd)	Usage	Location	Supplier/ Operator
1.	Aluminium Africa (ALAF)	0.39	Boiler & Power	Chang'ombe	PAET
2.	Azam Bakeries Co Ltd	0.06	Boiler	Kipawa	PAET
3.	Bautech Company Ltd 1	0	Boiler	Vingunguti	PAET
4.	Bora Industries	0.01	Boiler	Chang'ombe	PAET
5.	East Coast Oil & Fats Ltd	0.47	Boiler	Kurasini	PAET
6.	Iron and Steel Limited	0.11	Heating	Mikocheni	PAET
7.	Kamal Steel Ltd	0.14	Heating	Chan'ombe	PAET
8.	Kioo Glass	2.67	Heating	Chang'ombe	PAET
9.	MM Integrated Steel (MM1)	0.15	Heating	Mikocheni	PAET
10.	MM Integrated Steel -2	0.19	Heating	Mikochezi	PAET
11.	MM Integrated Steel (MM3)	0.14	Heating	Mikocheni	PAET
12.	Murzah Oil Mills Unit 1	-	Boiler	Vingunguti	PAET
13.	Murzah Oil Mills Unit 2	0.10	Boiler	Vingunguti	PAET
14.	Murzah Oil Unit Mills Unit 4	0.01	Boiler	Vingunguti	PAET
15.	Murzah Soap and Detergent Unit 3	0.21	Boiler	Buguruni	PAET
16.	Namera Group of Industries	0.06	Boiler	Gongo la mboto	PAET
17.	Nampak (T) Ltd	0.01	Boiler	Ilala Bungoni	PAET
18.	Nida Textile Mills Ltd	0.46	Boiler	Tabata	PAET
19.	OK Plast Ltd	0.13	Boiler	Vingunguti	PAET
20.	SBC Tanzania - Pepsi	0.23	Boiler	Kiwalani	PAET
21.	Serengeti Breweries Ltd	0.10	Boiler	Chang'ombe	PAET
22.	SilAfrica Tanzania T Ltd	0.03	Boiler	Chang'ombe	PAET
23.	Steel Masters Ltd	0.10	Heating	Chang'ombe	PAET
24.	Tanpack Tissues Ltd	0.13	Boiler	Mikocheni	PAET
25.	Tanzania Breweries Ltd (TBL)	0.29	Boiler	Ilala Karume	PAET
26.	Tanzania Cigarette Company (TCC)	0.37	Boiler + Power	Chang'ombe	PAET
27.	Tanzania Cuttleries Manufacturer Ltd	0.02	Heating	Chang'ombe	PAET
28.	Tanzania-Chinese Textile (TCFT)	0.001	Boiler	Ubungo	PAET
29.	VOT Tanzania	0.02	Boiler	Kurasini	PAET
30.	Gaia Eco Solution	0.11	Boiler	Vingunguti	PAET
31.	Said S. Bakhresa & Co Ltd (SSB)	-	Boiler	Buguruni	PAET
32.	Soap & Allied Industries L	0.01	Boiler	Chang'ombe	PAET



S/N	Name of customer	Average consumption (MMscfd)	Usage	Location	Supplier/ Operator
33.	A-one	0.89	Boiler +Power	Kiwalani	PAET
34.	Royal Soap & Detergent Industry Ltd	0.31	Boiler	External - Ubungo	PAET
35.	Jumbo Packaging	0.02	Boiler	Vingunguti	PAET
36.	Mikoani Edible oil	0.17	Boiler	Mbagala	PAET
37.	Tanzania Pasta Industries	0.07	Boiler	Vingunguti	PAET
38.	Tanga Pharmaceutical	0.01	Boiler	Vingunguti	PAET
39.	Quaim Steel Industry	0.001	Boiler	Chang'ombe	PAET
40.	Tanzania Portland Cement Limited (AG)	5.46	Heating Kilns	Tegeta - Wazo	PAET
41.	Raddy Fiber Manufacturing	0.01	Power and Heating	Mkuranga	TPDC/ GASCO
42.	Dangote Cement factory	12.32	Power and Heating	Mtwara	TPDC/ GASCO
43.	Goodwill ceramic factory	3.90	Power and Heating	Mkuranga	TPDC/ GASCO
44.	Lodhia steel Ltd	0.26	Heating	Mkuranga	TPDC/ GASCO
45.	Knauf Gypsum factory	0.22	Heating	Mkuranga	TPDC/ GASCO
46.	Coca-Cola	0.09	Heating	Dar es Salaam	TPDC/ GASCO
47.	MM Integrated Steel Mills (MMI 2)	0.12	Heating	Dar es Salaam	PAET
48.	MM Integrated Steel Mills (MMI 3)	0.13	Heating	Dar es Salaam	PAET
49.	TAQA Dalbit Tanzania Ltd		Filling station	Dar es Salaam	PAET
50.	Sapphire Float Glass	4.05	Power and Heating	Mkuranga	TPDC/ GASCO
51.	Balochistan	0.1304	heating	Mkuranga	TPDC/ GASCO
52.	LN Future	0.22	heating	Mkuranga	TPDC/ GASCO
53.	Chemi & Cotex Industries Ltd (0.037)	0.037	heating	Dar es Salaam	TPDC/ GASCO
54.	Cotex Industries Ltd (0.015)	0.015	heating	Dar es Salaam	TPDC/ GASCO



Annex 12: Natural Gas Consumption and Contribution by Category from FY 2020/21 to 2023/34

S/N	Customer Category	Consumed Volume (MMscf)							
		FY2020/21		FY2021/22		FY2022/23		FY 2023/24	
		Volume (MMscf)	% Share	Volume (MMscf)	% Share	Volume (MMscf)	% Share	Volume (MMscf)	% Share
1.	Power	45,664.79	77.07%	49,875.96	79.17%	51,609.78	81.57%	70,061.45	85.41%
2.	Industries	11,321.24	19.11%	13,013.30	20.66%	11,540.83	18.24%	11,639.30	14.19%
3.	CNG Vehicles		0.00%	94.6	0.15%	104.42	0.17%	308.72	0.37%
4.	Households, Commercial and Institutions	2,267.85	3.83%	11.52	0.02%	18.02	0.03%	15.55	0.02%
TOTAL		59,253.88		62,995.38		63,273.06		82,025.03	



Annex 13: List of Natural Gas Pipelines Wayleave Interferences

S/N	Type of facility	Encroachment/ Erosion	Location	Wayleave owner	Marker posts visibility	Service provider
1.	Pipeline	Erosion	Ulongoni	TPDC	OK	GASCO
2.	Pipeline	Wayleave Encroachment	KP 21, Kilimahewa Street.	TPDC	OK	GASCO
3.	Pipeline	Excavation on wayleave	KP 26, Kisanga street	TPDC	OK	GASCO
4.	FOC cut off	Wayleave Encroachment	Kisanga - Tegeta	TPDC	OK	GASCO
5.	Pipeline	Wayleave Encroachment	Makongo Juu	TPDC	OK	GASCO
6.	Pipeline	Wayleave enchronment	Songosongo Island	TPDC	OK	GASCO
7.	Main gas pipeline	Encroachment	Mikocheni light industries	TARURA	Visible	PAET
8.	Main gas pipeline	Encroachment	Buguruni kwa mnyamani	TRC	Visible	PAET
9.	Main gas pipeline	Erosion	Mabibo bridge	TRC	Visible	PAET
10.	Main gas pipeline	Encroachment	Mwakaringa road	TARURA	Visible	PAET



Annex 14: Integrity of Distribution Network

Operator	Type of devices	No. of devices available	No. of device re-calibrated	No. of device re-calibrated in %	No. of Planned Functional Test	No. of Functional Test Conducted	Number of planned gas leak survey	Number of conducted gas leak	Target
PAET-Distribution	PSV	55	55	100%	1	1	263	263	100%
	Meter	54	54	100%	N/A	N/A	263	263	100%
TPDC-Distribution	PSV	68	64	94%	4	4	48	48	100%
	Meter	48	48	100%	N/A	N/A	48	48	100%





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Annex 15: Table Local Content Performance

S/N	Requirements	TPDC		PAET		SONGAS		M&P		ANRIC CNG		DANGOTE CNG	
		x/y	%	x/y	%	x/y	%	x/y	%	x/y	%	x/y	%
1.	Number of local employees out of total employees	415/415	100	106/107	99	72/72	100	92/98	93.87	8/10	80	14/14	100
2.	Number of local staff trained out of total employees	294/415	71	36/36	100	2/6	33	89/98	90.81	10/10	100	10/14	71
3.	Number of local financial services utilised out of total financial services	10/12	83	2/2	100	3/3	100	3/3	100	3/5	75	3/4	75
4.	Number of local insurance services utilised out of all insurance services awarded	1/1 (NIC)	100	4/5	80	4/4	100	3/3	100	3/3	100	1/2	50
5.	Number of procurement contracts awarded to nationals out of the total number of procurements	38/40	93	40/48	55.6	5/6	83	44/44	100	4/6	66.67	0	0
Note: x=local element; y=total													

