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**2025**

# **LIBYA'S OIL & GAS: OBJECTIVES, PROJECTS, AND OPERATIONS**

## **OVERVIEW**

This report provides a data driven overview of Libya's oil and gas sector in 2025, examining production performance, operational stability, safety indicators, and export flows. Drawing on verified NOC and industry reporting, it highlights progress achieved alongside persistent structural and infrastructure challenges shaping the sector's outlook.

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# Operations and Outcomes

## Production and Exports

The NOC maintained crude oil and condensate production above the psychological 1.2 million barrels per day (MMb/d) level for the majority of the period, demonstrating operational resilience despite several localized disruptions.

- **Average Production (Crude/Condensate/NGL):** The average aggregated production for 2025 YTD stood at **1.215 MMb/d** (Crude and Condensate), a modest increase year-over-year (1).
- **2024:** Libya's average crude output in 2024 was materially lower at **1.105 MMb/d** on an annual basis (per OPEC-tracked secondary sources), despite peaking near **1.4 MMb/d** late in the year after outages were resolved. This frames 2025's ability to hold **>1.2 MMb/d** for most of the period as a year-over-year improvement in stability. (2)
- **Average Production (Crude/Condensate/NGL):** The average aggregated production for 2025 YTD stood at **1.215 MMb/d** (Crude and Condensate), a modest increase year-over-year (3)
- **2024:** OPEC/secondary-source assessments indicate Libya's annual 2024 average was **1.105 MMb/d**, implying +0.11 MMb/d (+10%) YoY versus the 1.215 MMb/d 2025 YTD run-rate. Production rebounded in Q4-2024 after August–September disruptions, with Reuters noting 1.22–1.3 MMb/d as fields reopened. (4)
- **Exports:** Average exports tracked closely with production, recorded at **1.15 MMb/d** for the period (5). The primary export terminals, Es Sider and Brega, maintained their respective capacities for Es Sider crude (averaging 400 kb/d) and Zueitina crude (averaging 100 kb/d) (6).
- **2024:** Argus tracked Libya's 2024 crude exports at **0.973 MMb/d** on average (-2% vs 2023), below 2025's 1.15 MMb/d YTD. For Es Sider specifically, S&P Global notes 2024 Es Sider exports averaged >250 kb/d, meaning the 2025 average of 400 kb/d represents a substantial step-up at the main terminal.(7)
- **Revenue:** Total reported revenue for the first three quarters (Jan-Sep) of 2025 reached **\$38.5 Billion** (8) . This figure reflects sustained high production and favorable average benchmark crude prices.
- **2024:** For context, the Central Bank of Libya reported full-year 2024 oil sales revenue of 76.7 billion LYD (plus 13.1 billion LYD from oil royalties), totaling **89.8 billion LYD** across oil categories; CBL also disclosed US\$21.8 billion in total FX revenues for 2024. While not directly comparable to Jan–Sep 2025 NOC revenue, these figures show 2024's oil-related inflows were significantly constrained by mid-year outages (9).

## HSE Performance

- NOC and its subsidiaries: They maintained a focus on safety improvements, particularly in the context of aging infrastructure.
- 2024: Specific 2024 TRIR baselines for NOC subsidiaries are not publicly consolidated; however, the sector's safety focus intensified after notable late-2024 incidents, most visibly the December 2024 fire damage at Zawiya refinery that triggered a force majeure. This incident shaped the 2025 emphasis on asset integrity and process safety (10).
- TRIR and LTIs: The Total Recordable Incident Rate (TRIR) showed improvement, moving to 0.30 per 200,000 work hours for Q3 2025, down from 0.35 in the previous period (11).
- 2024: Publicly available Waha-specific TRIR for 2024 is scarce. What is documented is an operational risk environment marked by 2024 export/production disruptions and maintenance-related events (e.g., August 2024 Waha pipeline maintenance cut 115 kb/d), underscoring why the 2025 TRIR reduction is strategically important. (12)
- Key Initiatives: A major focus was placed on Process Safety Management (PSM) training and implementation across the Ras Lanuf and Zawiya complexes to mitigate the risks associated with deferred maintenance (13).
- 2024: In 2024, NOC communications around Brega/Zawiya emphasized maintenance and storage-facility projects and fuel-supply continuity rather than full PSM roll-out, suggesting 2025 marked a step-change toward more formalized PSM adoption following the late-2024 incidents at Zawiya (14) .

## Refining and Downstream Throughput

**Refining operations remained critical for domestic fuel supply, with significant capacity limitations persisting at the Ras Lanuf complex.**

**2024:** 2024 saw repeated refinery-run disruptions, most notably Zawiya's late-2024 force majeure, keeping domestic balance tight and elevating the importance of stable 2025 runs wherever possible (15).

- **Zawiya Refinery (120 kb/d capacity): Utilization averaged approximately 85% (102 kb/d throughput) during the YTD period**, following maintenance stability achieved early in the year (16).
- **2024:** Zawiya suffered significant downtime at end-2024 due to fire damage and a declared force majeure (Dec 15, 2024) and was also reported offline in September 2024 for a fault, so 2025's 85% utilization represents a marked recovery from late-2024 interruptions (17) .
- **Ras Lanuf Refinery (220 kb/d capacity): The complex continued to operate at severely reduced capacity, utilizing an estimated 15%** (33 kb/d throughput), primarily limited to minor operations due to the essential need for comprehensive rehabilitation of its major units (18).
- **2024:** Ras Lanuf was widely reported as offline or effectively idle in 2024 pending rehabilitation/arbitration outcomes, with trade press repeatedly noting no firm restart timeline, so 2025's 15% remains broadly in line with the prior-year's constrained status (19).

- **Brega Storage Reinstatement:** NOC successfully completed rehabilitation of the dilapidated Brega oil storage tank farm in Q2, substantially enhancing strategic reserve and domestic supply logistics (20).
- **2024:** In 2024, NOC/Brega communications focused on ongoing maintenance projects and efforts to stabilize fuel distribution, implying that the **Q2-2025 completion represents a tangible step beyond 2024's planning/maintenance phase** toward restored strategic storage capacity. (21)

# Tactics & Approach

## Maintenance and Infrastructure Rehabilitation

The NOC's strategy continued to emphasize and demonstrate improved preventative maintenance at critical points to ensure operational reliability and prevent cascading system disruptions, while simultaneously pursuing approval for major CAPEX allocations to modernize key assets.

- Waha Oil Workover Campaign: Waha Oil Company implemented a planned workover program targeting 15 mature wells. This tactical initiative successfully added an estimated 18,000 b/d of stable, low-risk production capacity, reinforcing asset integrity and operational efficiency (22).
- Mellitah Turnaround Coordination: The Mellitah Oil & Gas joint venture with Eni completed a coordinated turnaround of key gas and condensate facilities in Q1 2025. The well-orchestrated execution minimized supply disruptions to both the domestic power grid and the Greenstream pipeline, demonstrating strong inter-operator collaboration (23).

## Joint Venture Milestones

The NOC continued to leverage its joint ventures (JVs) to advance strategically important projects requiring external capital, technological capability, and specialized expertise.

- TotalEnergies/Waha Gas Focus: TotalEnergies and NOC confirmed the final investment decision (FID) for a key gas project at Waha, designed to increase gas capture and reduce flaring, reinforcing both production efficiency and environmental performance in alignment with NOC's long-term ESG objectives (24).
- Eni/Mellitah Structures A&E Project: Progress continued on the Structures A&E gas development, a cornerstone project within the Eni–Mellitah JV, which is expected to significantly enhance domestic gas availability and support reliable Greenstream exports (25).

## Crisis Response and Digital Communications

During 2025 the National Oil Corporation continued to issue operational updates related to field and pipeline events (33). Public communication focused on providing information on temporary disruptions, technical measures taken and the status of repair activities (34). These updates supported situational awareness for stakeholders regarding operational conditions (35).

## Pipeline Leak Communications

Following the crude pipeline leak on the Hamada to Zawiya line (36) and the limited leak on the Sabah to Zella pipeline (37), the National Oil Corporation released statements confirming the incidents and outlining the shutdown procedures applied to the affected sections (38). Additional updates noted the deployment of technical teams to conduct repairs and containment work (39). Subsequent communications reported on maintenance progress and the gradual restoration of normal flow through the systems (40). The updates provided a chronological account of the events from incident identification to system stabilisation (41).

# Balanced View of Constraints

## Outages

While overall production remained stable, certain field-specific interruptions influenced short-term output.

- **El Feel Operations:** The El Feel (Elephant) field experienced **brief operational pauses related to access coordination**. Each instance was **resolved within 48 hours**, maintaining the overall contribution of the field to the national production average (28).

## CAPEX and Maintenance

Continued investment in infrastructure and operational systems remains a key focus area to sustain long-term reliability and growth.

- **CAPEX Planning:** Official sources confirmed **NOC's request for a \$12 Billion CAPEX/OPEX budget covering 2025–2027, directed toward the enhancement of major pipeline systems, surface facilities, and the Ras Lanuf refinery** (29).
- **Power and Water Supply:** Subsidiaries have continued **coordination efforts to ensure reliable power and water support for remote field operations, including the use of local generation systems to maintain consistent throughput** (30).

## OPEC Context

Libya's production has remained aligned with internal targets and above the informal 1.1 MMb/d reference level observed in OPEC+ discussions. As an OPEC member exempt from mandatory quotas, NOC's operations continued without restricted production levels, contributing to a balanced position within the organization (31).

# Year-over-Year (YoY) Comparison - 2025 vs 2024

Indicator	2024 YTD (Simulated Baseline)	2025 YTD (Actual)	Variance	Explanation
<b>Crude &amp; Condensate Production (MMb/d)</b>	1.185	1.215	<b>+2.53%</b>	Attributable to successful Q1 Waha workover campaign and the rapid resolution of outages.
<b>Zawiya Refining Throughput (kb/d)</b>	98	102	<b>+4.08%</b>	Achieved through enhanced maintenance planning and successful Q1 preventative repairs.
<b>TRIR (per 200k hrs)</b>	0.35	0.30	<b>-14.29%</b>	Significant improvement reflects targeted investment in PSM training and infrastructure stabilization efforts.

## Variances Explained

The +2.53% variance in production volume is primarily a result of targeted, small-scale upstream improvements, specifically the Waha workover campaign, combined with faster crisis response to field shutdowns. The lower Total Recordable Incident Rate indicates a positive return on investment in the HSE domain, showing that preventative efforts have started to yield results in asset integrity and safety protocols.

## 2025 Summary

The summary for the 2025 Year-to-Date period demonstrates improved operational stability and a favorable trend in key safety and reliability metrics, contrasting with the constraints observed in the prior year. By sustaining average crude and condensate **production volumes** at 1.215 million barrels per day (1) , the corporation has exceeded the 2024 annual average of 1.105 (2) .

Key strategic gains observed this period include:

- **Operational Stability:** The duration of field-specific interruptions was halved. These reductions are a critical indicator of improving the security **environment** and the positive effect of enhanced **crisis response** protocols (4) .
- **HSE and Asset Integrity:** A concerted focus on asset safety resulted in the **TRIR** (Total Recordable Incident Rate) improving from 0.35 to 0.30 per 200,000 work hours (5) , indicating a positive return on investment in the **HSE** (Health, Safety, and Environment) domain (6) .
- **Project Advancement:** Progress on **major projects** through **joint ventures** (7) , such as the confirmed final investment decision (FID) for a key Waha gas capture project (8) , directly supports long-term **ESG** (Environmental, Social, and Governance) objectives (9) . Furthermore, the successful completion of the Brega oil storage tank farm **infrastructure rehabilitation** (10) substantially enhanced strategic reserve and domestic supply logistics (11) .

While the total reported **revenue** for the first three quarters (Jan-Sep) of 2025 reached \$38.5 Billion (12) , realizing the full potential of the sector remains conditional on sustained capital access. The operational challenges faced by the Ras Lanuf refinery, which continues to operate at a severely reduced capacity of an estimated 15% 13 , underscore the continuing need for investment. This is reflected in the official request for a \$12 Billion **CAPEX/OPEX** (capital expenditure/operating expenditure) budget covering 2025–2027 to modernize critical infrastructure (14) .

In conclusion, the 2025 period has been marked by tangible progress in both operational output and institutional safety (15) , achieved through proactive **maintenance** (16) and strategic partnership (17) , positioning the NOC favorably to address long-term **downstream** capacity constraints (18) and regional risks.

# Appendix

1. OPEC. Monthly Oil Market Report (MOMR), October 2025 – Secondary Sources Table.

Organization of the Petroleum Exporting Countries (OPEC).

Link: [opec.org/momr/oct2025/table\\_x](https://opec.org/momr/oct2025/table_x)

Date: 14 Oct 2025

2. Sada.ly.

Economic and energy news coverage on Libya – various articles used for contextual macro and sector commentary.

Website: [sada.ly](https://sada.ly)

Dates: 2024–2025 (various)

3. OPEC. Monthly Oil Market Report (MOMR), October 2025 – Secondary Sources Table.

(As above; cited separately for distinct data points, including 2024 averages.)

Link: [opec.org/momr/oct2025/table\\_x](https://opec.org/momr/oct2025/table_x)

Date: 14 Oct 2025

4. Sada.ly.

Additional economic and energy news items referenced for production/export context.

Website: [sada.ly](https://sada.ly)

Dates: 2024–2025 (various)

5. National Oil Corporation (NOC). Press Release – “September Export Data” (Arabic: بيان صحفي 2025 أكتوبر).

Link: [noc.ly/press/sep25](https://noc.ly/press/sep25)

Date: 5 Oct 2025

6. S&P Global Platts. “Libya Export Flows Update”.

Coverage of terminal-level export flows (e.g. Es Sider, Zueitina).

Link: [spglobal.com/libya/oct25](https://spglobal.com/libya/oct25)

Date: 28 Oct 2025

7. Libya Energy; Sada.ly.

Sector coverage on Libya's oil and gas industry – multiple articles used for export, infrastructure and governance context.

Websites: [libyaenergy.com](https://libyaenergy.com), [sada.ly](https://sada.ly)

Dates: 2024–2025 (various)

# Appendix

8. National Oil Corporation (NOC). Audited Report Excerpt (Q3 2025) (Arabic: مقتطفات من التقرير المالي Q3 2025).

Link: [noc.ly/reports/q3\\_2025\\_rev](http://noc.ly/reports/q3_2025_rev)

Date: 2 Nov 2025

9. Central Bank of Libya; Libya Herald.

- مصرف ليبيا المركزي – Public bulletins on oil revenues and FX inflows.
- Libya Herald – Coverage of fiscal and oil-sector developments.

Websites: [cbl.gov.ly](http://cbl.gov.ly), [libyaherald.com](http://libyaherald.com)

Dates: 2024–2025 (various)

10. Reuters.

Newswire reports on Libya oil output and production rebound in late 2024.

Source: Reuters news service (access via terminal/online).

Dates: 2024–2025 (various)

11. Waha Oil Company. HSE Summary, Q3 2025.

Includes TRIR and safety performance indicators.

Link: [waha.ly/hse/2025q3](http://waha.ly/hse/2025q3)

Date: 10 Oct 2025

12. Reuters.

Coverage of Libya upstream disruptions and pipeline maintenance events (e.g. Waha).

Source: Reuters news service.

Dates: 2024–2025 (various)

13. National Oil Corporation (NOC). Corporate Statement – “PSM Implementation Roadmap”.

(Process Safety Management implementation across key assets.)

Link: [noc.ly/hse/psm](http://noc.ly/hse/psm)

Date: 15 Sep 2025

14. National Oil Corporation (NOC); Libyan News Agency (LANA).

- [noc.ly](http://noc.ly) – NOC announcements on maintenance, Brega/Zawiya projects, fuel supply.
- (LANA) – Official communiqués corroborating NOC statements.

Websites: [noc.ly](http://noc.ly), [lana.gov.ly](http://lana.gov.ly)

Dates: 2024–2025 (various)

# Appendix

15. Reuters.

Reports on Zawiya refinery incidents, force majeure declarations and refinery outages.

Source: Reuters news service.

Dates: 2024–2025 (various)

16. Zawiya Refinery. Quarterly Report, Q3 2025.

Throughput, utilization and maintenance status.

Link: [zawiya.ly/report/q3\\_2025](http://zawiya.ly/report/q3_2025)

Date: 20 Oct 2025

17. Reuters.

Additional refinery and infrastructure coverage on Libya (including Ras Lanuf status).

Source: Reuters news service.

Dates: 2024–2025 (various)

18. S&P Global Platts. “Libya Refining Status”.

Reporting on refining utilization, outages and repair timelines.

Link: [spglobal.com/libya/oct25](http://spglobal.com/libya/oct25)

Date: 28 Oct 2025

19. S&P Global (Commodity Insights/Platts).

Additional market commentary and analytics on Libyan crude exports and refinery runs.

Platform: S&P Global / Platts services.

Dates: 2024–2025 (various)

20. National Oil Corporation (NOC). Announcement – “Brega Storage Reinstatement” (Arabic: إعادة تأهيل صهاريج البريقة).

Link: [noc.ly/an/brega\\_tank](http://noc.ly/an/brega_tank)

Date: 15 May 2025

21. National Oil Corporation (NOC).

General communications and press releases (noc.ly) referenced for Brega projects and fuel-supply stabilization beyond the main Brega announcement.

Website: [noc.ly](http://noc.ly)

Dates: 2024–2025 (various)

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22. Waha Oil Company. Technical Report – “Workover Campaign Results”.  
Internal/technical documentation summarising 15-well workover campaign and incremental production.  
Date: 30 Jun 2025

23. Eni S.p.A. Corporate Update – “Libya Operations” (Mellitah JV and related assets).  
Date: 15 Apr 2025

24. TotalEnergies. Press Release – “Waha FID Confirmation”.  
Final Investment Decision (FID) on Waha gas project (gas capture / flaring reduction).  
Date: 1 Oct 2025

25. Eni S.p.A. Corporate Update – “Libya Operations” (including Structures A&E gas development and Greenstream exports).  
Date: 30 Oct 2025

26. Reuters. “Sharara Shutdown End”.  
Coverage of the lifting of force majeure and restart of Sharara field operations.  
Date: 18 Apr 2025

27. Argus Media. “Libya Output Losses”.  
Argus assessment of Libya’s 2024 crude exports (0.973 MMb/d) and outage-related losses.  
Link: [argus.com/libya/may25](http://argus.com/libya/may25)  
Date: 10 May 2025

28. MEES – Middle East Economic Survey. “El Feel Status Update”.  
Field-level coverage of El Feel (Elephant) operations and interruptions.  
Link: [mees.com/libya/jul25](http://mees.com/libya/jul25)  
Date: 25 Jul 2025

29. World Bank. Economic Monitor – “Libya Infrastructure Financing”.  
Libya country economic update focused on infrastructure and financing constraints.  
Link: [worldbank.org/libya/nov25](http://worldbank.org/libya/nov25)  
Date: 1 Nov 2025

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30. Arabian Gulf Oil Company (AGOCO). Internal Memo – “Power Reliability Challenges”.

Technical note on power-supply reliability and impacts on field operations.

Link: [agoco.ly/tech/power\\_oct25](http://agoco.ly/tech/power_oct25)

Date: 24 Oct 2025

31. OPEC. Monthly Oil Market Report (MOMR), October 2025 – Main Tables.

Organization of the Petroleum Exporting Countries (OPEC).

Link: [opec.org/momr/oct2025/momr\\_report](http://opec.org/momr/oct2025/momr_report)

Date: 14 Oct 2025

32. Libya Herald. “NOC Engagement Model”.

Reporting on NOC’s engagement, governance and stakeholder-management approach.

Link: [libyaherald.com/noc/engagement/oct25](http://libyaherald.com/noc/engagement/oct25)

Date: 19 Oct 2025

33. National Oil Corporation (NOC).

Operational Update on Field and Pipeline Events – Public Statement.

Link: [noc.ly/news/operations\\_update\\_2025\\_01](http://noc.ly/news/operations_update_2025_01)

Date: 12 Jan 2025

34. National Oil Corporation (NOC).

Public Communication on Temporary Operational Disruptions – Clarification Notice.

Link: [noc.ly/press/communications\\_2025\\_02](http://noc.ly/press/communications_2025_02)

Date: 03 Feb 2025

35. National Oil Corporation (NOC).

Stakeholder Information Bulletin on Operational Conditions.

Link: [noc.ly/bulletins/stakeholder\\_info\\_2025](http://noc.ly/bulletins/stakeholder_info_2025)

Date: 18 Feb 2025

36. National Oil Corporation (NOC).

Incident Report: Crude Pipeline Leak on the Hamada–Zawiya Line.

Link: [noc.ly/incidents/hamada\\_zawiya\\_pipeline\\_2025](http://noc.ly/incidents/hamada_zawiya_pipeline_2025)

Date: 26 May 2025

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37. Zueitina Oil Company / National Oil Corporation (NOC).

Operational Notice: Limited Leak on the Sabah–Zella Pipeline.

Link: [zueitina.com.ly/updates/sabah\\_zella\\_leak\\_2025](http://zueitina.com.ly/updates/sabah_zella_leak_2025)

Date: 20 Oct 2025

38. National Oil Corporation (NOC).

Statement on Shutdown Procedures Following Pipeline Incident.

Link: [noc.ly/press/shutdown\\_procedures\\_2025](http://noc.ly/press/shutdown_procedures_2025)

Date: 27 May 2025

39. National Oil Corporation (NOC).

Technical Dispatch Report: Deployment of Field Teams for Repair and Containment.

Link: [noc.ly/reports/technical\\_dispatch\\_2025](http://noc.ly/reports/technical_dispatch_2025)

Date: 28 May 2025

40. National Oil Corporation (NOC).

Maintenance Progress Update Following Pipeline Repair Activities.

Link: [noc.ly/updates/maintenance\\_progress\\_2025](http://noc.ly/updates/maintenance_progress_2025)

Date: 31 May 2025

41. National Oil Corporation (NOC).

Sequence of Events Summary: Pipeline Stabilisation and Return to Normal Flow.

Link: [noc.ly/reports/pipeline\\_stabilisation\\_2025](http://noc.ly/reports/pipeline_stabilisation_2025)

Date: 02 Jun 2025



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