# Regional Analysis Brief: Eastern Mediterranean Energy Overview

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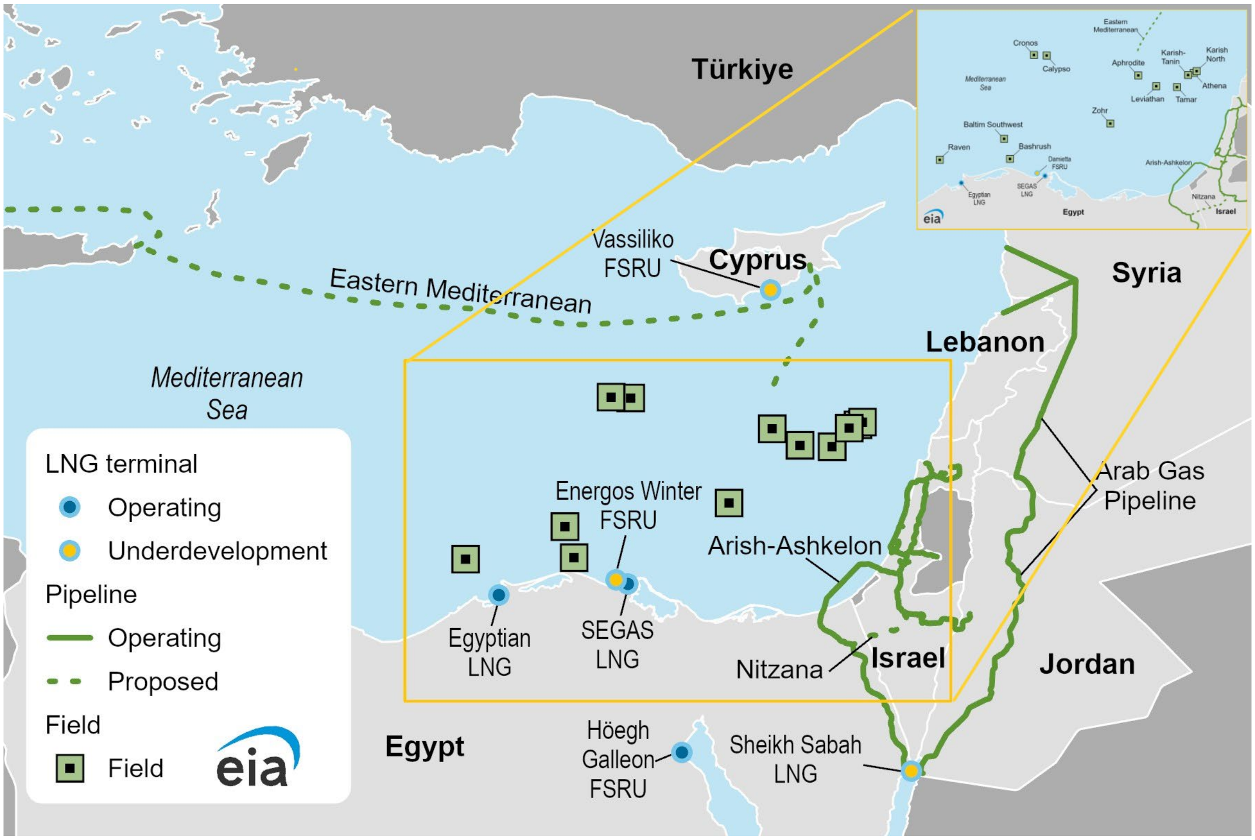
# Eastern Mediterranean in Context

- This brief examines the regional dynamics of the oil and natural gas markets in the Eastern Mediterranean, focusing on **Israel**, **Egypt**, **Cyprus**, **Jordan**, and **Lebanon**. The analysis excludes Türkiye and Greece because their natural gas infrastructure is less integrated with the other countries in the Eastern Mediterranean. Over the past decade, Israel and Egypt have emerged as significant regional natural gas producers, with Cyprus also expanding production. However, the natural gas market dynamics in the five countries and the configuration of their midstream natural gas infrastructure create both challenges and opportunities for the countries to use regional natural gas supply for their own purposes.
- Natural gas production grew significantly in the Eastern Mediterranean after major offshore discoveries in **Egypt** and **Israel** began commercial operations in the 2010s. **Cyprus's** natural gas fields are still under development and could boost regional growth once commercial production begins.
- The development of midstream infrastructure for natural gas in the Eastern Mediterranean is still emerging. As of July 2025, Egypt is the only country in the region with liquefied natural gas (LNG) export capacity, which Israel uses to deliver natural gas outside the region. Cyprus aims to use Egypt's LNG infrastructure once its offshore fields begin producing, which could lead to competition with Israel for Egypt's LNG export capacity. **Jordan** and **Lebanon** are developing LNG infrastructure that would allow additional natural gas import flexibility.
- Egypt's natural gas balance has tightened because of modest growth in its natural gas production and higher domestic consumption, forcing the country to import more piped natural gas from Israel and LNG from abroad to meet its domestic needs. However, increased political tensions in the region following the Hamas attack on Israel in 2023 have disrupted Israel's natural gas production on many occasions, most recently in June 2025. Political tensions in the region will likely continue to pose a risk to natural gas trade flows, potentially for an extended period of time.[1]
- In May 2025, The U.S. government issued a 180-day waiver on sanctions imposed on Syria under the 2019 Caesar Syria Civilian Protection Act and began rolling back other sanctions, renewing prospects for reviving Syria's energy sector. According to Energy Intelligence reports, the 14-year civil war in Syria, which culminated in the fall of the al-Assad regime in December 2024, devastated the energy sector and its economy. Rolling back sanctions provides an opening for the Syrian government to potentially attract foreign investment to its energy sector.[2]

**Figure 1. Map of the Eastern Mediterranean region**




Source: U.S. Energy Information Administration, Global Energy Monitor, Global Gas Infrastructure Tracker, and the World Bank Group

# Exploration

- The government of **Egypt** is looking to address the growing gap between domestic fossil fuel supply and demand, particularly for natural gas, by launching several licensing rounds to attract upstream development. In August 2024, the government opened its latest exploration licensing round, offering 10 offshore blocks and 2 onshore blocks in the Eastern Mediterranean and the Nile Delta. In February 2025, Egypt launched an additional bidding round (the Open Blocks Licensing Program, or OBLP) that allows investors to bid on seven undeveloped fields in the Mediterranean Sea, as well as six other onshore and offshore areas in the Gulf of Suez and the Western Desert. The 2024 international licensing round closed in February 2025, and bids for that round are currently being evaluated; the 2025 OBLP will close bidding in July 2025.[3]
- **Israel** does not have any open bidding rounds for exploration. Its most recent bidding round, the Fourth Offshore Bid Round (OBR4), offered 20 offshore blocks for exploration in the Mediterranean Sea. Bidding closed in 2023, and licenses were awarded to six companies, which included international oil companies (IOCs) such as Eni and BP. Israel is reportedly planning to launch a fifth round sometime in 2025.[4]
- **Lebanon** extended the deadline for bid submissions in its third offshore licensing round to November 28, 2025, according to The Lebanese Petroleum Administration. The current round offers nine offshore blocks for exploration (Blocks 1−4, 5−8, and 10), which are in its maritime

exclusive economic zone. The third offshore licensing round was initially launched in late 2023, with a deadline for submissions in July 2024, but was postponed because of rising geopolitical tensions in the area.[5]

- Neither **Cyprus** nor **Jordan** has any bidding rounds underway or planned for the near future (Table 1).

**Table 1. Ongoing or upcoming licensing rounds for oil and natural gas exploration**

| Country | Licensing round | Status | Number of blocks offered | Location | Notes |
|---|---|---|---|---|---|
| Egypt | 2024 licensing round | Evaluating bids | 12 | Onshore and offshore | Blocks offered in the Mediterranean Sea and the Nile Delta |
| Egypt | 2025 Open Blocks Licensing Program | Calling for bids | 13 | Onshore and offshore | Includes seven undeveloped fields in the Mediterranean Sea; bidding closes in July 2025 |
| Israel | Fifth Offshore Bid Round | Planning for bids | Unknown | Offshore | Reportedly to be launched by the end of 2025 |
| Lebanon | Third offshore licensing round | Calling for bids | 9 | Offshore | Bid submission deadline extended to November 2025 |

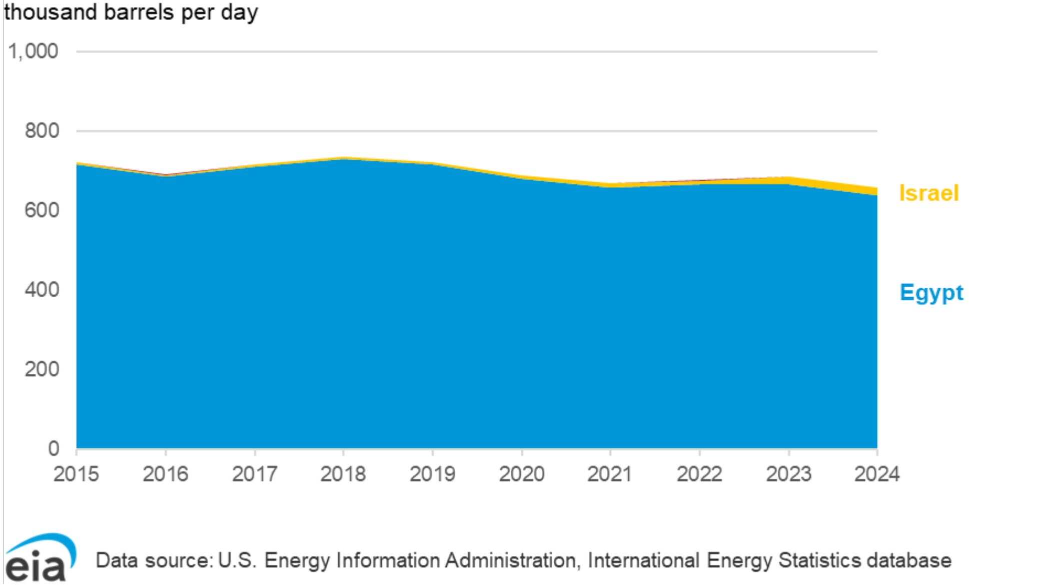
Data source: Rystad Energy, ministry websites, Fitch Solutions Country Risk & Industry Research industry reports

# Petroleum and Other Liquids

## Production

- **Egypt** is the largest liquid fuels producer in the Eastern Mediterranean, producing an average of about 687,000 barrels per day (b/d) from 2015 to 2024. Egypt's total liquid fuels production increased slightly after 2017 when the Zohr natural gas field came online, which provided a boost to natural gas plant liquids production. Egypt's total liquid fuels production began to decline by 2019, however, because of maturing fields, reduced oil-focused upstream activity, and no new significant discoveries.[6]
- **Israel** produces only small amounts of liquid fuels, averaging about 10,000 b/d between 2015 and 2024.
- **Jordan** produced negligible amounts of liquid fuels from 2015 to 2024, while **Cyprus** and **Lebanon** did not produce any liquid fuels during the same period (Figure 2).[7]

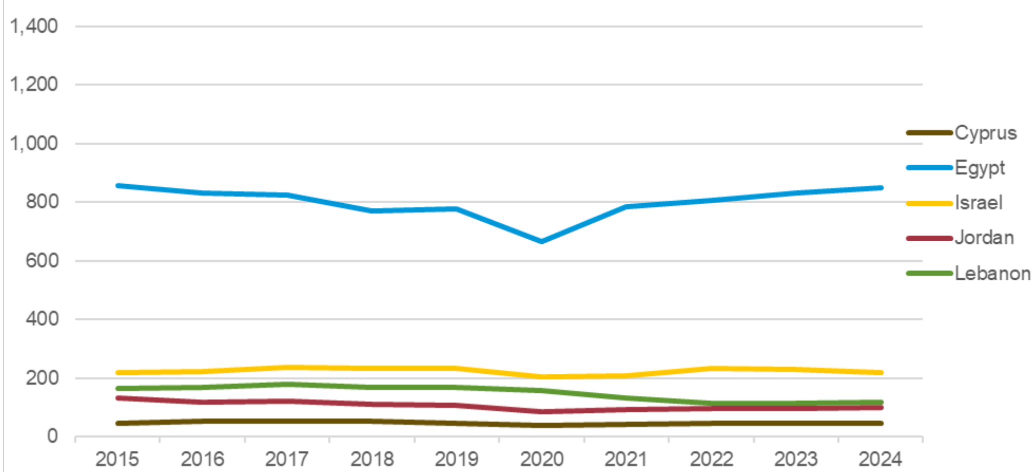
Figure 2. Annual liquid fuels production, selected countries in the Eastern Mediterranean, 2015–2024




## Consumption

- **Egypt** is the largest liquid fuels consumer in the Eastern Mediterranean, in part because of its larger economy and population, according to World Bank estimates and EIA analysis. On average, Egypt consumed 799,000 b/d between 2015 and 2024.[8]
- **Israel, Jordan,** and **Lebanon** have relatively smaller populations and consume small liquid fuels volumes compared with Egypt. Israel consumed about 223,000 b/d of liquid fuels between 2015 and 2024. During the same 10-year period, Lebanon's liquid fuel consumption averaged about 148,000 b/d, and Jordan's consumption averaged about 105,000 b/d.[9]
- **Cyprus** consumes the lowest volumes of liquid fuels in the Eastern Mediterranean, consuming, on average, about 47,000 b/d between 2015 and 2024 (Figure 3).[10]

Figure 3. Annual liquid fuels consumption, selected countries in the Eastern Mediterranean, 2015–2024
thousand barrels per day



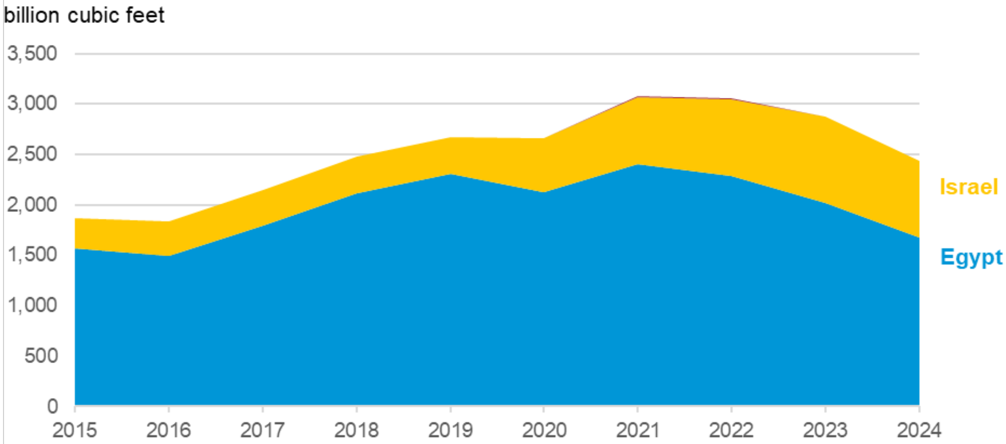

Data source: U.S. Energy Information Administration, International Energy Statistics database
Note: 2024 data for Cyprus, Egypt, Jordan, and Lebanon are EIA estimates.

# Natural Gas

## Production

- **Egypt** is the top natural gas producer in the Eastern Mediterranean, producing an average of about 2.0 trillion cubic feet (Tcf) per year between 2015 and 2024, according to estimates by EIA and the Energy Institute. Before commercializing the Zohr field, Egypt's natural gas production declined between 2012 and 2017 because it had no new discoveries and natural declines in its maturing fields. After the Zohr field was discovered in 2015, it was fast-tracked for development and came online in 2017 and significantly increased Egypt's natural gas production. Egypt's dry natural gas production reached a peak of about 2.4 Tcf in 2021, which was approximately 61% higher than in 2016, the year before the Zohr field came online. However, since then, natural gas production growth has fallen, in part because no new fields are under development, production is declining at maturing fields, and persistent technical issues that have limited natural gas output at the Zohr field.[11]
- **Israel** is the second-highest natural gas producer in the Eastern Mediterranean, producing an average of 528 billion cubic feet (Bcf) per year between 2015 and 2024, according to estimates by EIA and the Energy Institute. Before 2012, Israel produced very little domestic natural gas, but natural gas production increased significantly after the first phase of the Tamar field came online in 2013. Other significant natural gas discoveries, such as the Leviathan and the Karish fields, have continued to fuel Israel's natural gas production growth.[12] However, the attack on Israel by Hamas in October 2023 and subsequent missile attacks by Iran led to brief shutdowns at some of Israel's major natural gas fields, most recently in June 2025. The fields and their associated infrastructure reportedly suffered no damage and were shut down pre-emptively for safety and security reasons.[13]
- **Jordan** has very little domestic natural gas production, averaging 6 Bcf between 2014 and 2023. Jordan's only producing field is the Risha field in the northeast, and production from this field is used for domestic power generation.[14]
- **Cyprus** and **Lebanon** did not produce any dry natural gas between 2014 and 2023 (Figure 4).[15]

Figure 4. Annual dry natural gas production, selected countries in the Eastern Mediterranean, 2015–2024

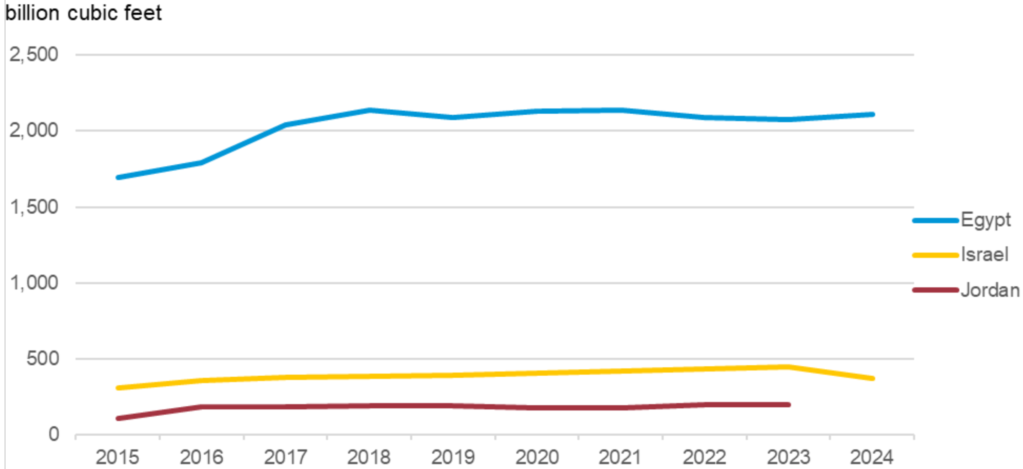



Data source: U.S. Energy Information Administration, International Energy Statistics database; The Energy Institute's 2025 Statistical Review of World Energy
Note: 2024 data estimates for Israel and Egypt are from the Energy Institute. 2024 data estimates for Jordan, Cyprus, and Lebanon are unavailable. Jordan production data are too small to show in figure.

## Consumption

- **Egypt** is the top natural gas consumer in the Eastern Mediterranean region. Domestic natural gas consumption grew over the past decade, averaging about 2 Tcf per year between 2015 and 2024, according to estimates by EIA and the Energy Institute. Egypt's natural gas production varied during this period, necessitating natural gas imports in some years to meet domestic demand, which grew at a consistent pace.[16]
- **Israel** also consumes less natural gas domestically relative to neighboring Egypt, but consumption has grown significantly since 2012. Israel's development of its own natural gas resources has enabled it to substitute natural gas for coal and petroleum products in power generation and industrial production.[17]
- **Jordan** uses relatively small amounts of natural gas domestically, averaging 159 Bcf per year between 2014 and 2023.[18]
- **Cyprus** and **Lebanon** historically have not used natural gas, instead using other fuel sources to meet domestic consumption across sectors (Figure 5).[19]

Figure 5. Annual dry natural gas consumption, selected countries in the Eastern Mediterranean, 2015–2024




Data source: U.S. Energy Information Administration, International Energy Statistics database; The Energy Institute's 2025 Statistical Review of World Energy
Note: 2024 data estimates for Israel and Egypt are from the Energy Institute. 2024 data estimates for Jordan, Cyprus, and Lebanon are unavailable.

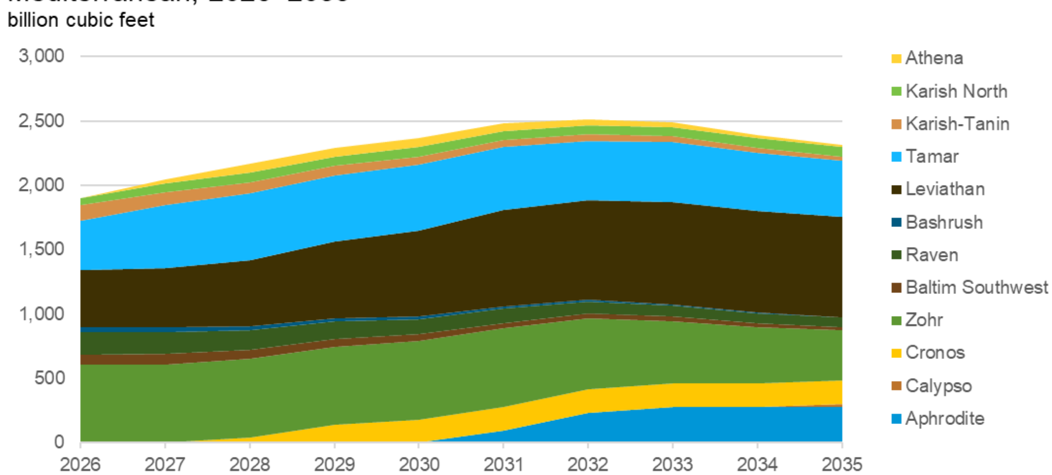
## Recent natural gas discoveries

- **Cyprus** has had several natural gas discoveries that may make the country a significant regional producer in the future. In February 2025, the governments of Cyprus and Egypt approved development plans for the Aphrodite and Cronos natural gas fields, which are located southwest of Cyprus. Chevron and Eni are the respective operators for the Aphrodite and Cronos fields and intend to link their upstream facilities to Egypt's natural gas transmission network for export, given Cyprus's relatively low domestic demand and lack of natural gas export infrastructure.[20] According to Rystad Energy, production from these fields is not likely to start until the end of this decade, subject to pending final investment decisions for these fields. Other offshore discoveries in Cyprus's waters, such as the Calypso or Glaucus fields, may lead to additional natural gas production but are still in preliminary development.[21]
- **Egypt's** Zohr field, located in the Shorouk concession, came online in 2017 and is the country's largest natural gas discovery to date; Eni is the operator. Natural gas production at the Zohr field reportedly reached approximately 1.0 Tcf per year in February 2021, but unplanned outages in 2020 and 2021 have since limited output. Eni plans to drill additional wells to increase production, but the outlook remains uncertain.[22] Other offshore projects brought online in the past five years—such as the Baltim Southwest, Bashrush, and Raven projects—have resulted in additional output, but none rivals the Zohr field in production volume. Egypt does not have any other significant discoveries in the development pipeline, limiting the country's prospects for continued growth in natural gas production.[23]
- **Israel** has had a substantial boost to its natural gas production over the past decade resulting from a series of significant offshore natural gas discoveries coming online, most notably the Leviathan field, which is one of the largest natural gas discoveries in the region. Production growth is likely to continue over the next decade; Israel has planned further development at its

Leviathan and Tamar fields and is looking to develop smaller offshore discoveries, such as the Athena field.[24]

- **Jordan** and **Lebanon** have not reported any significant offshore natural gas discoveries in the Eastern Mediterranean recently (Table 2 and Figure 6).

Figure 6. Forecast natural gas production from selected fields in the Eastern Mediterranean, 2026–2035




Data source: Rystad Energy

**Table 2. Significant offshore natural gas discoveries in the Eastern Mediterranean**

| Country name | Discovery name | Location | Operator | Estimated startup date |
|---|---|---|---|---|
| Cyprus | Aphrodite | Block 12, Levantine Basin | Chevron | 2031 |
| | Calypso | Block 6, Herodotus Basin | Eni | 2035 |
| | Cronos | Block 6, Nile Delta Basin | Eni | 2028 |
| Egypt | Zohr | Shorouk Block, Nile Delta Basin | Petrobel (Eni/EGPC JV) | 2017 |
| | Baltim Southwest | Baltim Block, Nile Delta Basin | Petrobel (Eni/EGPC JV) | 2019 |
| | Raven | Alexandria B Block and West Mediterranean Deep Water 1 Block, Nile Delta Basin | BP | 2021 |
| | Bashrush | Bashrush Block, Nile Delta Basin | Eni | 2022 |
| Israel | Leviathan | Blocks I/14 and I/15, Levantine Basin | Chevron | Phase 1A: 2019<br>Phase 1A (3rd pipeline expansion): 2025<br>Phase 1B (Stage 1): 2028<br>Phase 1B (Stage 2): 2029 |
| | Tamar | Block I/12, Levantine Basin | Chevron | Tamar Phase 1: 2013<br>Tamar SW: 2024<br>Tamar Expansion Phases 1 and 2: 2026 |
| | Karish-Tanin | Blocks I/17 and I/16, Levantine Basin | Energean | 2022 |
| | Karish North | Block I/17, Levantine Basin | Energean | 2024 |
| | Athena | Block 12, Levantine Basin | Energean | 2027 |

Data source: Rystad Energy

## Natural gas trade

### *LNG infrastructure*

- **Cyprus** does not have any operating LNG infrastructure. A floating storage and regasification unit (FSRU) is under construction at the port of Vassiliko and is reportedly aiming to begin commercial operations by the end of 2025.[25]
- **Egypt** operates two LNG export terminals at Damietta (SEGAS LNG) and Idku (Egyptian LNG). These two export terminals export LNG produced domestically and piped in from Israel to destinations, including Europe.[26] Cyprus also plans to use Egypt's LNG infrastructure to export its natural gas once its fields come online.[27] Egypt has one FSRU in operation where they can import LNG. The Egyptian Natural Gas Holding Company (EGAS) secured a charter for the *Höegh Galleon,* an FSRU operating at Ain Sukhna until February 2026; the *Höegh Galleon* is reportedly scheduled to be replaced with another FSRU, the *Höegh Gandria,* in the fourth quarter of 2026 when its charter expires.[28]
- Egypt is looking to increase its regasification capacity in the future by securing additional FSRUs, which would enable the country to increase LNG imports relatively quickly to satisfy domestic

demand. EGAS chartered two FSRUs from New Fortress Energy, the *Energos Eskimo* and the *Energos Power*, which began commercial operations at Ain Sukhna in July 2025. The *Energos Eskimo* was operating at the Aqaba port in Jordan until it departed for Egypt in June 2025.[29] A third FSRU, the *Energos Winter*, was secured through a five-year charter with New Fortress Energy and is scheduled to begin operations at the terminal in Damietta by the end of August 2025.[30]

- **Israel** does not have any operating LNG facilities. Israel exports surplus natural gas to Egypt via pipeline, where the gas is either re-exported through Egypt's LNG facilities or consumed in that country. Israel previously had one FSRU (known as the *Excelerate Excelsior* FSRU) in operation from 2013 to 2022 at the port of Hadera near Sharon.[31] Excelerate Energy, the owner of the FSRU, announced the FSRU's charter would not be renewed and the FSRU would be redeployed to Albania's Vlora LNG terminal in 2023.[32]
- As of August 2025**, Jordan** has an FSRU, the *Energos Force*, that is currently operating at the Sheikh Sabah Al Ahmad Al Jaber Al Sabah LNG terminal, located at the port of Aqaba in the southwestern tip of the country. The *Energos Force* replaced the previous FSRU, the *Energos Eskimo*, which departed for Egypt in June 2025 after its charter expired. NEPCO, Jordan's state utility, signed agreements with EGAS that would enable either country to ship natural gas to the other via the Arab Gas Pipeline in the event of an emergency, providing both countries with additional import capacity from FSRUs located outside their territories.[33]
- **Lebanon** has no infrastructure to produce or transport LNG**.** In 2019, the Lebanese government announced a tender offer for private companies to provide FSRUs near Beddawi, Zahrani, and Selaata to import natural gas that would feed into either existing or proposed power plants near the respective sites, but the projects have either been put on hold or have not reached final investment decisions (Table 3).[34]

**Table 3. LNG infrastructure in the Eastern Mediterranean**

| Country | Facility name | Status | Facility type | Location | Operator | Start date | Nameplate capacity (billion cubic feet per year) |
|---|---|---|---|---|---|---|---|
| Cyprus | Cyprus LNG | Proposed | LNG export facility | Vassiliko Port | Unknown; owned by ETYFA | Unknown | 240 |
| | Vassiliko FSRU | Under construction | FSRU | Vassiliko Port | Unknown; owned by DEFA | 2025 | 96 |
| Egypt | SEGAS LNG | Operating | LNG export terminal | Damietta | SEGAS Services | 2005 | 240 |
| | Egyptian LNG | Operating | LNG export terminal | Idku | Egyptian LNG | 2005 | 346 |
| | Höegh Galleon FSRU | Operating | FSRU | Ain Sukhna | EGAS (owned by Höegh, leaving 2026) | 2024 | 274 |
| | Energos Eskimo FSRU | Operating | FSRU | Ain Sukhna | EGAS (owned by New Fortress Energy, redeployed from Jordan) | 2025 | 274 |
| | Energos Power FSRU | Operating | FSRU | Ain Sukhna | EGAS (owned by New Fortress Energy, redeployed from Germany) | 2025 | 274 |
| | Energos Winter FSRU | Proposed | FSRU | Damietta | EGAS (owned by Botaş) | 2025 | 274 |
| | Höegh Gandria FSRU | Proposed | FSRU | Ain Sukhna | EGAS (owned by Höegh, arriving 2026) | 2026 | 365 |
| Jordan | Energos Force FSRU | Operating | FSRU | Aqaba | NEPCO | 2025 | 274 |
| Lebanon | Beddawi FSRU | Shelved | FSRU | Beddawi | Unknown | Unknown | Unknown |
| | Selaata FSRU | Shelved | FSRU | Selaata | Unknown | Unknown | Unknown |
| | Zahrani FSRU | Shelved | FSRU | Zahrani | Unknown | Unknown | Unknown |

Data source: Global Energy Monitor, Energy Intelligence, Egypt Oil & Gas, International Group of Liquefied Natural Gas Importers (GIIGNL) 2025 Annual Report

## *Pipeline infrastructure*

- Development of the **East Mediterranean Gas (EastMed) pipeline**, a proposed natural gas pipeline that would deliver natural gas from fields in **Israel** and **Cyprus** to Greece (and possibly other European countries via the Gas Interconnector Greece-Bulgaria and the Poseidon pipelines), has reportedly stalled, although discussions and feasibility studies are still ongoing.[35] Stakeholders in the project are re-evaluating the project's feasibility and are also considering other alternatives as a result of the project's technical and financial challenges. In January 2020, the governments of Cyprus, Greece, and Israel agreed to build a subsea pipeline that would provide Europe, which has largely imported natural gas from Russia and Eurasia, with an alternative source.[36] European and U.S. support for the pipeline's development reportedly waned, in part, because of technical difficulties and territorial disputes between Türkiye and Cyprus over portions of the proposed route.[37]

- Development of the **Nitzana pipeline**, a proposed onshore natural gas pipeline that would transport natural gas from **Israel** to **Egypt** has been delayed because of a dispute between Chevron's field partners at the Leviathan and Tamar fields and Israel's Natural Gas Authority. The pipeline was originally scheduled to begin operations in 2025, but disagreements over cost sharing and allocation of the pipeline's takeaway capacity have reportedly delayed the start of commercial operations until the first half of 2028. The delayed start will complicate Israel's plans to provide Egypt with additional natural gas exports to meet growing demand.[38]
- The **Arab Gas Pipeline (AGP)** is a trans-regional natural gas pipeline that enables **Egypt** to export natural gas to neighboring countries **Syria**, **Jordan**, and **Lebanon,** as well as to **Israel** via the Arish-Ashkelon pipeline.[39] A June 2022 agreement among Syria, Lebanon, and Egypt sought to provide 23 Bcf per year (0.65 billion cubic meters per year) of natural gas from Egypt to Lebanon via Syria and Jordan along the AGP by using the Jordan segment of the AGP. However, implementation of the agreement was delayed because of U.S. sanctions imposed on the al-Assad regime. The lifting of U.S. sanctions on Syria in May 2025 may provide an opportunity for the countries to make headway in implementing the agreement.[40]
- The **Arish-Ashkelon pipeline,** also known as the Eastern Mediterranean Gas (EMG) pipeline, is a subsea branch pipeline of the AGP. The Arish-Ashkelon pipeline was initially built in 2008 to deliver natural gas from **Egypt** to **Israel**. Egypt's domestic natural gas shortages and damage to the AGP due to attacks on the pipeline in the 2010s curtailed Egypt's natural gas exports to Israel. In 2019, Egypt and Israel agreed to reverse pipeline flows, which delivered natural gas from Israel's offshore fields to Egypt.[41]
- **Jordan** began importing natural gas via pipeline from Israel's Leviathan field in 2019 following an agreement with Leviathan partners to deliver natural gas of up to 300 million cubic feet per day (or about 110 Bcf per year) over a 15-year period. Jordan also imports natural gas via pipeline, albeit in small quantities, from Egypt.[42]
- The government of **Cyprus** is planning to use Egypt's LNG infrastructure by developing a subsea pipeline that would connect to Egypt's natural gas processing plants and liquefaction facilities to export its natural gas to Europe. The proposed subsea pipeline would transport natural gas from the Aphrodite and Cronos fields, once operational, directly to Egypt's LNG facilities (Table 4).[43]

**Table 4. Major regional natural gas pipelines in selected Eastern Mediterranean countries**

| Pipeline name | Status | Length (miles) | Capacity (billion cubic feet per year) | Operators | Notes |
|---|---|---|---|---|---|
| Arish-Ashkelon Pipeline / Eastern Mediterranean Gas (EMG) | Operating | 56 | 147–247 | East Mediterranean Gas Company | Subsea pipeline that carries natural gas from Israel's offshore fields to Egypt |
| Arab Gas Pipeline (AGP) | Operating | 750 | 353 | EGAS, ENPPI, PETROGET, GASCO, SPC | Onshore pipeline that carries natural gas from Egypt to Jordan, Syria, and Lebanon |
| Nitzana pipeline | Proposed | 41 | 219 | Israel Natural Gas Lines | Onshore pipeline that carries natural gas from Israel to Egypt |
| Eastern Mediterranean Pipeline (EastMed) | Proposed | 1188 | 353 | IGI Poseidon S.A. | Subsea pipeline that carries natural gas from Israel, Cyprus, and Crete to Europe; capacity figure only includes Phase 1 planned capacity; Phase 2 expansion, if completed, would double Phase 1 capacity |

Data source: Global Energy Monitor, NS Energy Business, company websites

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[8] U.S. Energy Information Administration, *International Energy Statistics* database, accessed April 14, 2025. World Bank Group, *Open Data Portal*, accessed May 13, 2025. For a brief analysis on GDP growth and energy consumption, see Jeff Barron, "EIA forecasts world oil consumption growth to slow amid less economic activity," *Today in Energy*, U.S. Energy Information Administration, May 15, 2025.

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