The $35 Billion Question: Geopolitical Risk Throttles Eastern Mediterranean Gas Flow

A 35 billion dollar plan to expand Israeli Leviathan gas exports to Egypt is thrown into political doubt, turning Eastern Mediterranean supply into a strategic risk.

THE SHORT ANSWER

Why is the $35 billion Leviathan to Egypt gas deal at risk?

A planned 35 billion dollar, 15 year expansion of natural gas exports from Israel's Leviathan field to Egypt has been thrown into political doubt. Geopolitical risk and infrastructure bottlenecks now throttle a key Eastern Mediterranean supply route, turning regional gas flow into a strategic variable rather than a given.

In this briefing

01

A cornerstone deal under pressure

- The planned 35 billion dollar, 15 year expansion of gas exports from Israel's Leviathan field to Egypt has been thrust into a high stakes political standoff.
- The deal underpins Egypt's power generation and its ambitions as an LNG re-export hub, so any delay ripples across the region.
- What looked like a stable, long term supply arrangement is now exposed to shifting political will on both sides.

02

The bottlenecks behind the flow

- Egypt's idle LNG export capacity at Idku and Damietta depends on the reliable upstream gas this deal was meant to secure.
- Pipeline and infrastructure constraints limit how quickly supply can scale even if the politics are resolved.
- Chevron and its partners had planned heavy investment and a new pipeline route to bypass these bottlenecks.

03

What it means for the region

- Eastern Mediterranean gas supply is now a geopolitical variable that buyers must price and hedge.
- Regional energy security hinges on political alignment as much as on reserves and infrastructure.
- Buyers and suppliers should treat corridor risk as a core planning assumption, not an edge case.

What matters

01 A planned 35 billion dollar, 15 year expansion of Israeli Leviathan gas exports to Egypt has been thrown into political doubt, throttling a key Eastern Mediterranean supply route.

02 Infrastructure bottlenecks, including idle LNG capacity at Idku and Damietta and pipeline constraints, compound the geopolitical risk.

03 For buyers and suppliers, Eastern Mediterranean supply is now a strategic risk to price and hedge, not a stable baseline.

Continue the analysis

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