

EGYPT'S ENERGY MAP

MARKETS, TRANSITION & STRATEGIC PARTNERSHIPS



DECEMBER 2025

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Introduction

Egypt stands at a pivotal turning point in its energy journey, balancing its long-established reliance on oil and natural gas with an accelerating transition toward sustainable energy.

In fiscal year (FY) 2024/25, Egypt has delivered a high-performing energy sector by strengthening upstream activities, expanding discoveries, and reinforcing oil and gas as a key contributor to Gross Domestic Product (GDP), Foreign Direct Investment (FDI) inflows, and exports.

This momentum has been complemented by downstream capacity upgrades, digital transformation, renewable energy expansion, and the emergence of next-generation green fuels.

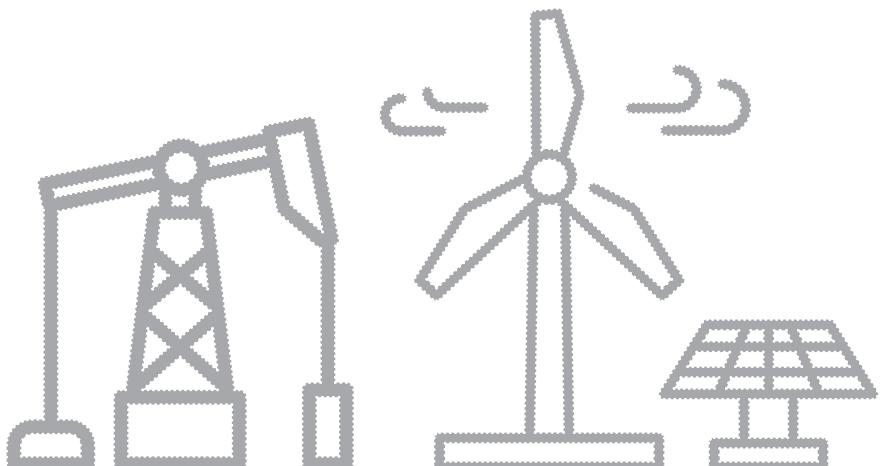
Hydrocarbons continue to underpin the national power supply in Egypt, reinforced by an ambitious five-year upstream program targeting 480 exploratory wells with \$5.7 billion investments.

Nevertheless, the government is simultaneously pursuing a diversified energy mix where renewables are targeted more than 42% by 2030, and more than 65% by 2040.

This dual-track strategy is anchored in national frameworks for economic growth, energy efficiency, emissions reduction, and energy security.

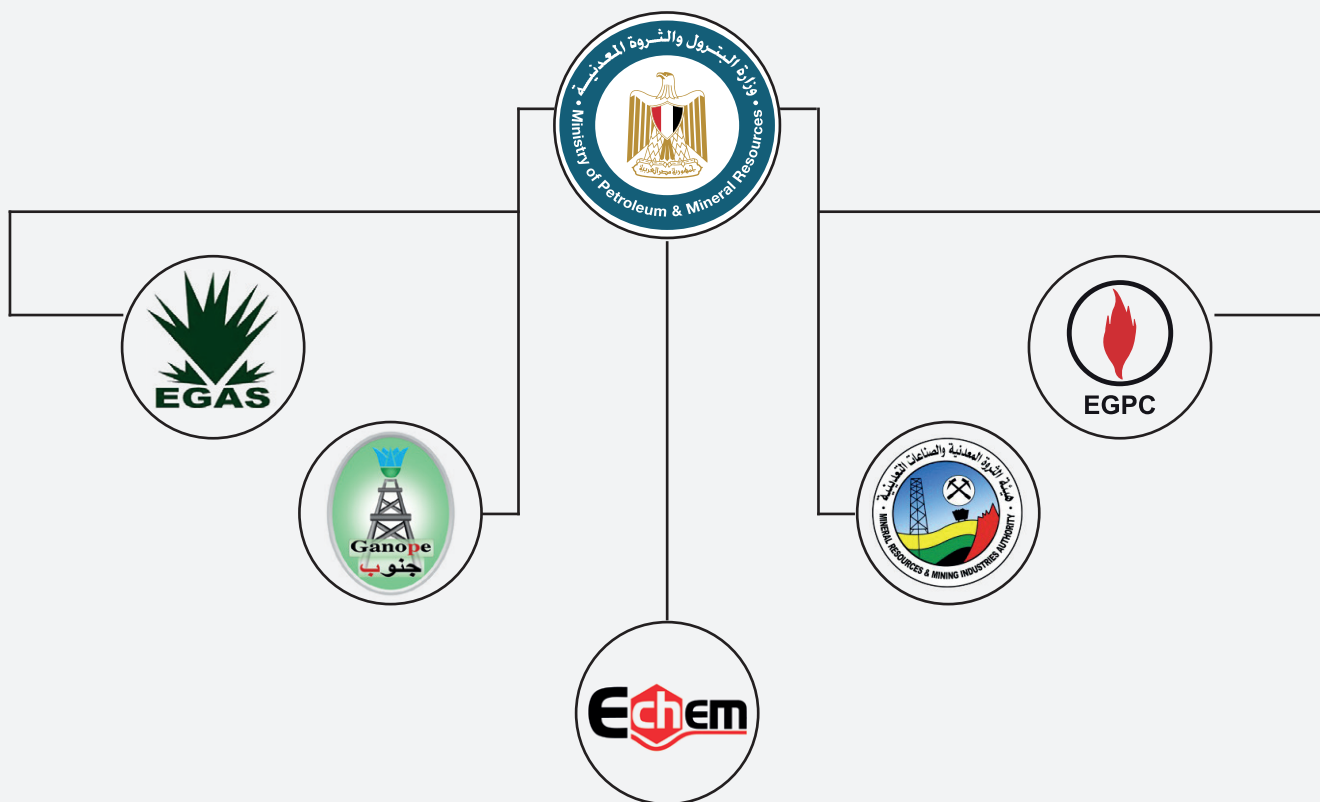
Supporting this shift, Egypt's 2024 Low-Carbon Hydrogen Strategy and the FY 2025/26 electricity sector plan increase allocation by 88%. The increase will be directed to grid modernization and capacity expansion.

This change signals the government's adoption of an integrated approach that combines hydrocarbons, renewables, and low-carbon technologies to strengthen regional export potential, attract foreign investment, and position Egypt as a regional energy hub.



Oil & Gas Sector Landscape

I. Organizational Framework



II. Upstream Outlook

a. Market Activity & Performance Indicators

■ Notable Exploration Discoveries

Between July 2024 and November 2025, Egypt's petroleum sector recorded approximately 75 new oil and gas discoveries and brought 383 new wells into production. These discoveries added around 1.1 billion cubic feet per day (bcf/d) of natural gas and 200,000 barrels per day (bbl/d) of crude oil, significantly reinforcing domestic output. These achievements contributed an estimated \$6.7 billion in import cost savings.

The sector also plans to drill over 100 new exploration wells in 2026 to sustain production momentum, according to the Ministry of Petroleum and Mineral Resources (MoPMR).

Major Discoveries (Jul 2024-Nov 2025)



Discovery








Company



Location



Crude Oil/Natural Gas Production

| Discovery | Company | Location | Crude Oil/Natural Gas Production |
|--------------------|---|----------------|---------------------------------------|
| Never-West 16 |  | Western Desert | 2300 bbl/d |
| West Fewebs-1 | | | 7,165 bbl/d |
| Jumana-1 | | | 36 mmcf/d |
| North Deep Lotus-1 |  | Gulf of Suez | 1,835 bbl/d 7 mmcf/d |
| East Crystal-1 |  | | Over 2,000 bbl/d |
| NER-1X | | | 3,000 bbl/d |
| NUT-1 |   | Western Desert | 50 mmcf/d |

Rigs Utilization & Drilling Updates

Rig activity in Egypt’s oil and gas sector for FY 2024/25 was dominated by onshore operations, with land drilling and workover programs representing most of the activity. Offshore operations relied primarily on jack-ups, while deepwater units were used only for limited campaigns. The Western Desert remained the main hub with around 70 rigs over the year. The national fleet recorded an overall average of about 161 rigs, according to the Egyptian General Petroleum Corporation (EGPC) data.

By the end of the fiscal year, 242 wells had been drilled, supporting development plans and maintaining production stability across key regions, according to MoPMR.

Licensing Rounds & Newly Awarded Concessions

During FY 2024/25, Egypt progressed its acreage offering program through two competitive licensing rounds. The first was issued by the Egyptian Natural Gas Holding Company (EGAS) in August 2024, offering 12 exploration blocks across the Mediterranean and onshore Nile Delta.

A second cluster bid round followed in March 2025 by the MoPMR, presenting 13 additional areas, including seven undeveloped Mediterranean fields, six offshore exploration areas in the Gulf of Suez, and the Western Desert. Both bid rounds received strong interest from international and local Exploration and Production (E&P) players, according to MoPMR.

In November 2025, the MoPMR launched the South Valley Egyptian Petroleum Holding Company (Ganope) Red Sea Bid Round, offering four blocks in a high-potential frontier basin and opening until May 2026.

Separately, in June 2025, seven concessions were granted through EGPC to Chevron Petroleum, Apache, Pharos Petroleum, IPR Energy, and the NPC-GHP consortium, totaling at least 17 committed wells. Ganope also signed a new Eastern Desert concession (South Wadi Al-Sahl) with LUKOIL covering a 200 square kilometer (km²) 3D seismic program and six wells, according to MoPMR.

Offered Blocks in the Last Three Bid Rounds*



*Including The Red Sea Bid Round

EGPC & EGAS Awarded Blocks in FY 2024/25

Number **16**

 Awarded Companies



The Egypt Upstream Gateway (EUG) has become the cornerstone of Egypt’s digital transformation in the petroleum sector, now fully operational and actively used by all relevant stakeholders. It represents the official digital platform through which Egypt offers exploration and production bid rounds to investors. By enhancing data transparency and supporting data-driven bid rounds, EUG is strengthening decision-making and significantly improving Egypt’s attractiveness to leading international investors.

EUG’s Key Highlights*



No. of Companies Registered

47



Launched Bid Rounds

9



Attracted Investments

\$1.2 billion



Targeted Drilling Wells

127



No. of Blocks

51

*Since Its Launch in February 2021

Hydrocarbon Production

Egypt’s oil and gas production has followed a fluctuating trend through the last few years. Natural gas production, which peaked at 6.6 bcf/d in 2021, slipped steadily to reach 4.02 bcf/d in June 2025 before rebounding in September. Oil production followed a similar trend, dropping from 600,000 bbl/d to a stable 540,000 bbl/d in February 2025.

To support the sector’s recovery, the MoPMR approved 28 new E&P agreements valued at a minimum of \$1.2 billion alongside plans for 115 wells. Preparations are also underway for a 2026 Mediterranean drilling campaign targeting 14 offshore wells. Egypt aims to raise gas production to 6.4–6.6 bcf/d over the next five years, supported by nearly \$13 billion in new partner investments, according to MoPMR.

Production in FY 2024/25



Crude Oil & Condensates

193.5 mmbbl



Natural Gas

1.65 tcf

b. Economic Footprint & Growth Signals

■ Contribution to GDP

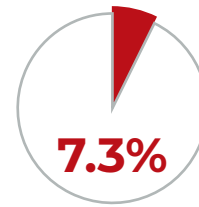
The value of Egypt's oil and gas sector's contribution to GDP increased by about 8% in FY 2024/25 compared to the previous year to reach EGP1.27 trillion on current prices.

This upward trend reflects the sector's continued strategic significance within Egypt's macroeconomic framework to mitigate fluctuations in global energy markets and the domestic production adjustments, according to the Ministry of Planning, Economic Development & International Cooperation.

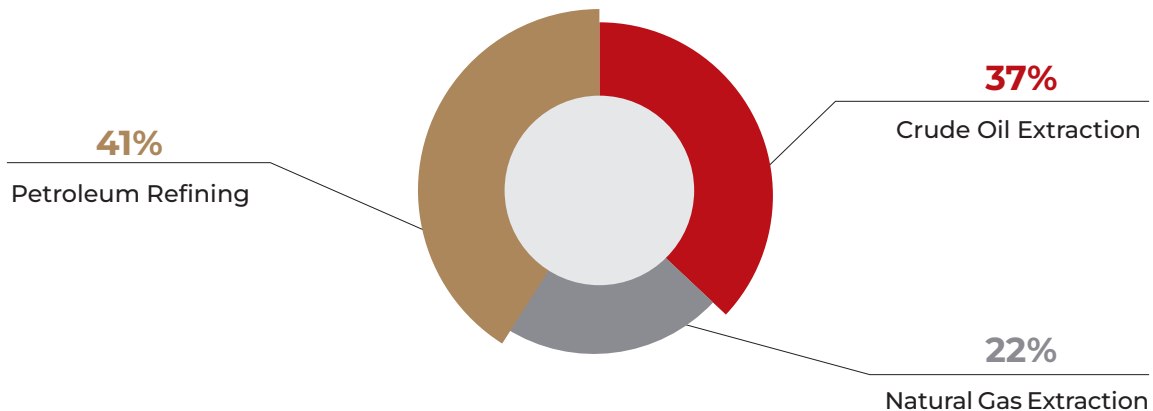
The sector's improved performance in FY 2024/25 was driven by gains in downstream activities and stronger refinery operations, supported by efficiency upgrades and increased throughput.

These improvements align with ongoing energy reforms focused on infrastructure modernization and local value creation. However, overall expansion remained moderate, reflecting subdued upstream momentum and continued sensitivity to global oil price swings.

Sector's Share of Total GDP in FY 2024/25



Petroleum Activities Contribution to the Sector's GDP in FY 2024/25



■ FDI Flows

FDI in Egypt's oil and gas sector recorded a net inflow of \$598.3 million in FY 2024/25, supported by stronger foreign partners' inflows and lower outflows, according to the Central Bank of Egypt (CBE). Total inflows to the sector reached \$6.2 billion in FY 2024/25, reflecting mainly greenfield investments by foreign oil companies.

Outflows, which cover cost recovery for exploration, development, and operating expenses incurred by foreign partners, stood at \$5.6 billion in FY 2024/25.

This outcome was driven by two key policy measures. Egypt continued to accelerate the settlement of arrears owed to foreign petroleum companies, paying significant amounts to clear past dues and improve partners' cash flow. In addition, the MoPMR introduced a new incentive package in August 2024 to raise production.

Eligibility was linked to production growth, exploration activity, and development drilling, while directing part of the incremental revenues to arrears repayment.

FDI Net Inflows in Egypt's Oil & Gas Sector in FY 2024/25



\$598.3 million

Oil & Gas Sector Contribution to Egypt's FDI Inflows in FY 2024/25



4.9%

■ Petroleum Trade Performance

Egypt's oil trade balance weakened in FY 2024/25, with the oil trade deficit reaching \$13.9 billion, driven by two factors: lower oil and gas export receipts and higher oil imports, according to the CBE. Egypt's oil and gas export receipts totaled \$5.6 billion in FY 2024/25.

Crude oil exports fell by about \$698.3 million, and natural gas exports, including liquefied natural gas (LNG) and other gas forms, dropped by nearly \$512.6 million due to lower exported volumes. Refined petroleum product exports increased by almost \$1.1 billion on higher export quantities, partially offsetting the decline.

Sector's Total Exports in FY 2024/25



\$5.6 billion

The softer export revenues in FY 2024/25 reflect weaker production of domestic crude oil and natural gas. Egypt also redirected more natural gas to cover rising local demand, resulting in limited export volumes.

At the same time, oil imports rose strongly, adding pressure on the current account balance, according to the CBE. Oil and gas exports accounted for 14% of total merchandise exports in FY 2024/25.

To revive LNG flows, the MoPMR rolled out incentives in August 2024 to raise natural gas output and speed

Refined Products Exports in FY 2024/25



\$3.2 billion

up exploration. The framework allows international oil companies (IOCs) to export a portion of their gas production as a way for the government to settle its dues to them, while improving pricing for new production shares.

Egypt shipped five LNG cargoes in 2025, mainly from Idku, supported by faster arrears clearance and higher production volumes from West Delta Deep Marine (WDDM) phases 10 and 11, according to MoPMR.

Egypt's LNG Exports in 2025



~741,000 m³

On the import side, the pressures on the petroleum trade balance intensified further. Following the decline in export revenues, Egypt's oil import bill inflated significantly in FY 2024/25, rising by about \$6.1 billion to \$19.5 billion compared with \$13.4 billion a year earlier.

Natural gas imports drove most of the rise, climbing by roughly \$3.9 billion, while imports of oil products increased by around \$1.7 billion. Crude oil imports also grew by about \$495.3 million, reflecting a pickup in imported quantities.

III. Downstream Review

a. Refining Performance Highlights

■ National Capacity & Production

Refining operations are a core component of Egypt's energy security strategy, working to close the gap between domestic production and consumption of refined products. Egypt's refining sector includes a combination of state-owned and private operators, with 11 active refineries. They are strategically distributed across major regions such as Alexandria, Cairo, Suez, and Assiut, according to the EGPC annual report. Refined products have increased significantly in FY 2024/25 by about 30%, contributing to meeting local demand and reducing imports, according to EGPC and MoPMR data.

Key Refineries Capacity*



~ 833,000 bbl/d

* Capacity of 8 Refineries (NPC, APC, CORC, MIDOR, APRC, SOPC, ASORC, SORC)

Output of Oil Refineries in FY 2024/25



34 mmt

Modernization & Capacity Expansion

Egypt continues to advance its refining infrastructure through a broad portfolio of projects. Focused on enhancing capacity, improving product quality, and strengthening energy security, with the aim of reducing fuel imports.

Key projects are underway, including the significant expansion in the Middle East Oil Refinery (MIDOR) to increase its capacity by 60%, from 100,000 to 160,000 bbl/d, with an investment of around \$2.7 billion, in addition to several other refineries.

Public Investments in the Oil and Gas Sector in FY 2024/25*



EGP 13.45 billion

*At Current Prices

b. Petrochemical Activities

National Capacity & Performance

The sector remained a core pillar of MoPMR's strategy, benefiting from stable operations, better integration, and improved feedstock and energy efficiency. The petrochemicals sector strengthened its role in the national economy during FY 2024/25, supported by a total production capacity of around 4.5 million tons per year (mmt/y). The sector contributed about 3% to GDP in 2024, with more expected surges with new projects in the pipeline. In addition to covering the needs of local industries, Egyptian petrochemical products are exported to more than 50 countries, reflecting growing value-added output and diversification, according to MoPMR.

Petrochemicals Performance Indicators for FY 2024/25



Production

4 mmt



Exports

\$2.6 billion





Expansion Plans & Investments

FY 2024/25 saw solid progress in Egypt's long-term petrochemical development program. Ongoing projects aim to boost local manufacturing, cut imports, and support cleaner industrial production.

The Egyptian Petrochemicals Holding Company (ECHEM) confirmed that major strategic projects are advancing toward operation in 2025–2026.

The National Petrochemicals Plan is also introducing new industrial products and expanding future export capacity, according to MoPMR.

Petrochemicals Growth & Investment Indicators

| | | |
|---|---|--|
|  | Implemented Investments | EGP 8.7 billion (~\$183 million)* |
|  | Complexes under Construction | 10 |
|  | Expected Output by 2030** | \$4.4 billion |
|  | New Industrial Products under the National Plan | 20 |

*At Current Prices

**From 10 Complexes under Construction

IV. Innovation and Technology

a. Deployment of AI in the Oil & Gas Sector

The adoption of artificial intelligence (AI) across Egypt's oil and gas value chain is reshaping the sector's competitive dynamics. AI and machine learning are being deployed from upstream exploration and production — to optimize drilling, revitalize mature wells, and enhance oil-recovery operations — to downstream refining and distribution, where digital tools improve supply monitoring and process control.

Key Projects at a Glance

|  Signing Date |  Parties |  Project |
|--|---|---|
| November 2024 |   | Use AI for Reservoir Management in the Gulf of Suez Offshore Fields |
| July 2024 |  | AI Technology to Develop the Al-Morgan & Badri Oil Fields |

Clean Energy Momentum

I. Renewables Pathway

a. Renewable Production Highlights

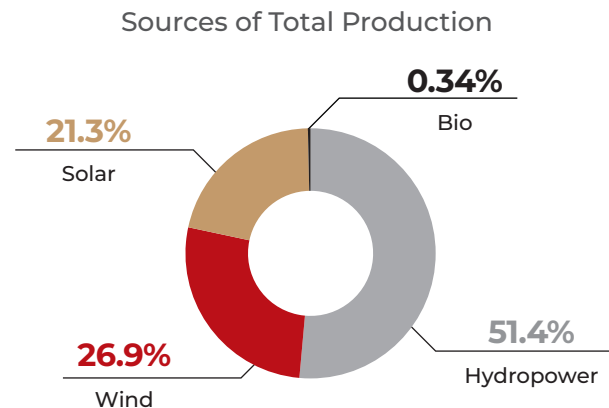
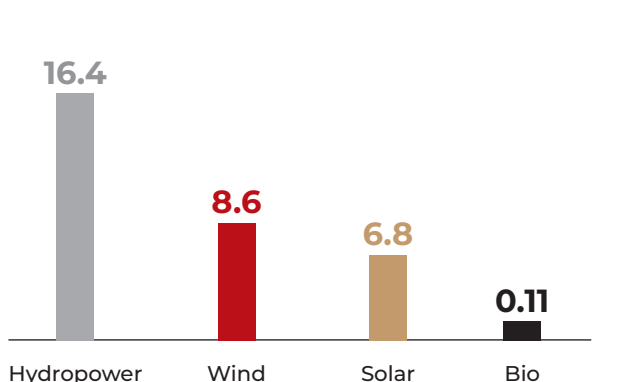
Egypt's renewable energy sector is expanding at an accelerated pace, reflecting both rising production levels and ongoing investment momentum. In FY 2024/25, renewable energy output grew by roughly 19.85% compared to the previous FY, indicating a steady upward trajectory in clean energy generation.

Installed renewable capacity also recorded a significant increase, reaching approximately 8.6 gigawatt (GW), marking a 26.5% rise, according to the New and Renewable Energy Authority (NREA).

Renewables Production in FY 2024/25



Renewable Energy Production by Source in FY 2024/25 (TWh)

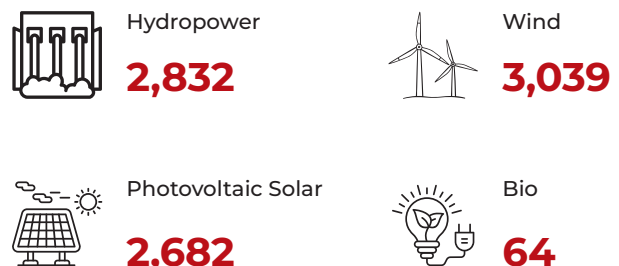


b. Installed Capacities per Sector

In FY 2024/25, Egypt's total hydropower installed capacity reached 2.83 GW, predominantly within the public sector, with capacity remaining stable year-on-year (YoY). In contrast, wind energy capacity expanded to approximately 3,039 megawatts (MW), supported by both the public and private sectors, resulting in a 61.2% increase compared to the previous FY.

Solar energy also demonstrated a robust growth, with capacity rising by 33% over the same period, according to NREA.

Total Installed Capacity in FY 2024/25 (MW)







c. Investment Climate for Renewables

Flagship Projects Overview

Egypt is accelerating renewable energy rollout by significantly increasing public investment in major solar, wind, and grid-upgrade projects.

Coupled with Build-Own-Operate (BOO) based private participation, these efforts advance the national strategy to raise renewables' share in power generation to 20% by FY 2025/26 and 42% by 2030, as stated by the Ministry of Planning, Economic Development & International Cooperation.

Key Renewable Projects

| | | | |
|---|-------------------------------|---------------------|--------------------|
|  Project Name | Abydos 1 Solar Station | Wind Project | Wind Farm |
|  Location | Aswan | Gulf of Suez | South of Hurghada |
|  Status | Implemented | Under Construction | Under Construction |
|  Capacity (MW) | 500 | 500 | 2000 |

Public Investment Milestones

Egypt's public investment climate for renewables is becoming increasingly favorable. This is manifested by allocating EGP 6.7 billion to connect four renewable energy projects from The Nexus of Water, Food, and Energy (NWFE) program to the national electricity grid. The four projects, which are expected to be connected by the summer of 2025, have a total of 3,700 MW of solar capacity and 2,840 megawatt per hour (MWh) of storage.

According to the Ministry of Planning, Economic Development, and International Cooperation, these investments target the initial phase of strengthening grid infrastructure to enhance reliability and support future renewable integration.

MoERE Investments in FY 2024/25



Renewables Public Investments in FY 2025/26



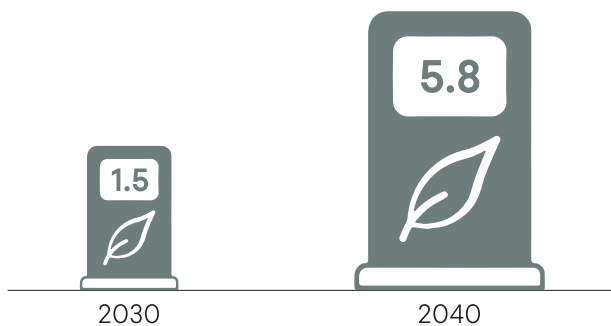
II. Next-Generation Fuels

a. Egypt's Strategic Approach

Egypt is emerging as a regional frontrunner in green hydrogen, capitalizing on its exceptional solar and wind potential. In August 2024, the country unveiled its National Low-Carbon Hydrogen Strategy, setting an ambitious trajectory to capture a significant share of the global tradable hydrogen market.

The strategy outlines estimated investments of \$60 billion and is expected to add between \$10 billion and \$18 billion to Egypt's GDP by 2040, according to the Egyptian Cabinet.

Targeted Annual Production (mmt/y)



Expected Contribution to the Tradeable Low-Carbon Hydrogen Market



b. Green Hydrogen & Ammonia Industry Progress

Egypt focuses on implementing the national strategy by supporting large-scale green hydrogen and ammonia projects through incentives and infrastructure development. Key initiatives include feasibility studies for new facilities, the establishment of green hydrogen and ammonia plants, and the development of supporting infrastructure like solar and wind farms and desalination plants.

Major international projects are moving forward, such as Hynfra's green ammonia facility and other projects with companies like Scatec, Fertigllobe, bp, Masdar, EDF Renewables, Zero Waste, and TAQA Arabia.

Green Hydrogen & Green Ammonia Projects by September 2025



39

Most of these projects are located within the Suez Canal Economic Zone (SCZONE), where the Authority concluded about 30 memoranda of understanding (MoUs), of which about 14 have been activated. These have resulted in the signing of 11 framework agreements. If these goals are achieved, Egypt will be an effective contributor to the global green hydrogen market.

Targeted Green Hydrogen & Green Ammonia Production*



18 mmt/y

*Upon the Completion of 11 Projects

c. SAF Emergence

MoPMR launched Egypt Sustainable Aviation Fuel (ESAF), a state-led company established in November 2024 to develop the country's first dedicated SAF facility. The project supports Egypt's low-carbon fuel transition and is designed to use locally sourced waste as feedstock for jet-fuel production, according to MoPMR.

SAF Project Indicators

Annual SAF Production Capacity



120,000 t/y

Investment Cost



\$530 million

III. Toward a Low-Emission Future

Egypt's energy transition in FY 2024/25 moved from ambition to delivery, with government-led actions targeting both structural decarbonization and operational emissions. Efforts focused on scaling low-carbon supply, improving efficiency across petroleum operations, and cutting high-impact sources such as flaring and methane.

a. Emissions-Reduction Initiatives

Egypt is accelerating a practical low-emission pathway in FY 2024/25 through a mix of on-site decarbonization projects and tighter operational emissions controls. The EGPC delivered 38 energy-transition projects during FY 2024/25, with 18 already operating and 20 in advanced execution.

They brought online about 30 MW of solar capacity, cut diesel burn, reflecting a shift toward cleaner and more cost-efficient operations, according to MoPMR.

Key Decarbonization Metrics in FY 2024/25



Diesel Burn Reduction

68 million liters per year



Estimated Operational Savings

EGP 5.2 billion

Egypt is reinforcing the same low-emission direction in power generation. The NWFE program accelerated low-carbon investments during FY 2024/25. By mid-2025, around 3.7 GW of new solar capacity, supported by battery storage, was on track to come online.

This expansion enables the phased shutdown of about 1.2 GW of older fossil-fueled plants, according to the Minister of Planning, Economic Development, and International Cooperation.

Power-Generation Decarbonization Metrics in FY 2024/25



New Solar Capacity on Track **3.7** GW



Older Fossil Capacity Phased Out **1.2** GW

b. Flaring & Methane Cut Programs

Gas flaring is a major source of local pollution and greenhouse gas (GHG) emissions, and it wastes a valuable energy resource. In FY 2024/25, Egypt expanded a national flaring- and methane-reduction approach led by the MoPMR.

To support implementation, MoPMR formed a committee to monitor flaring and promote reduction projects, and—together with the European Bank for Reconstruction and Development (EBRD)—developed a standardized Measurement, Reporting and Verification (MRV) methodology for associated gas flaring. Building on this framework, FY 2024/25 saw wider rollout of flaring-reduction measures across petroleum operations.

No. Implemented Flare Reduction Programs in FY 2024/25



42

In parallel, the EGPC and the U.S. Trade and Development Agency (USTDA) signed a \$959,006 grant in December 2024 to develop a sector-wide methane roadmap, guiding Leak Detection and Repair (LDAR) and capture solutions, according to the Egyptian Cabinet. Egypt also completed a project-identification phase with the World Bank's Global Flaring and Methane Reduction (GFMR) Partnership, paving the way for grant-backed rollout of flaring and methane-abatement projects, according to the GFMR Annual Progress Report 2025. In the same context, EGPC utilized about 4.5 billion cubic feet (bcf) of flare gas, cutting carbon dioxide (CO₂) emissions by roughly 470,000 tons per year (t/y) while converting waste gas into usable products, according to MoPMR.

In conclusion, Egypt's energy map in FY 2024/25 shows a sector adopting a dual strategy: sustaining hydrocarbons as a strategic economic pillar while actively reshaping the system for a lower-emission future. Upstream activity and new bid rounds helped to stabilize the production base, downstream and petrochemicals strengthened local value addition, and midstream infrastructure preserved Egypt's logistics advantage.

At the same time, renewables, green hydrogen, and sustainable fuels shifted from pilot ambitions to measurable capacity, financing, and implementation pathways.

The result is a more balanced energy portfolio that protects supply security today and builds resilience for tomorrow.

Looking ahead, Egypt's competitiveness will depend on how fast these tracks converge. The priority is clear: keep attracting disciplined E&P investment to stabilize output, while accelerating grid readiness, low-carbon fuels, and emissions-cutting programs that unlock export markets and climate finance. FY 2024/25 laid the foundations, through stronger partnerships, upgraded infrastructure, and a firmer decarbonization pipeline.

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EGYPT

OIL & GAS

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