

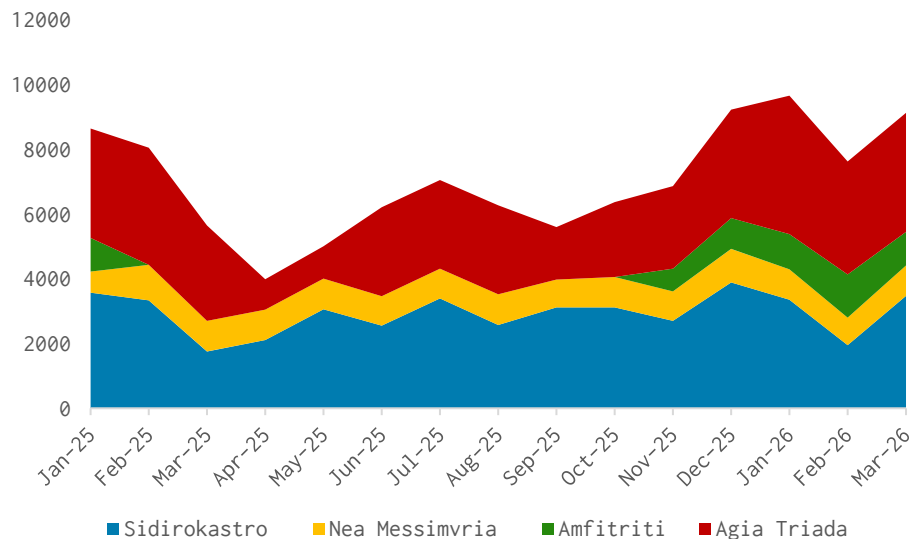


The Vertical Corridor and Greece as Energy Hub

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Vol.43 The Vertical Corridor and Greece as Energy Hub

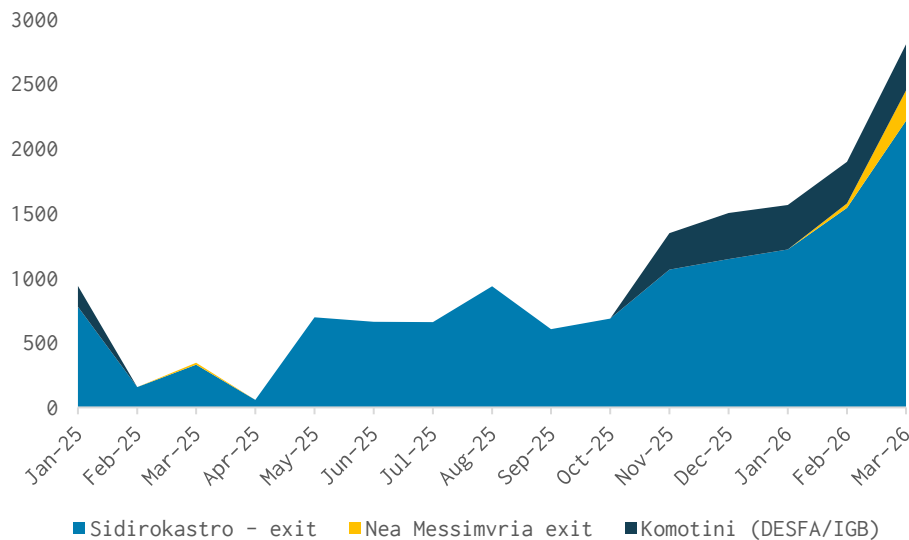
Monthly Natural Gas Imports (GWh) for Greece by entry point, [Jan 2025-Mar 2026]



Imports have steadily increased over the course of the past year

March 2025: 5,563.8 GWh
March 2026: 9,123.6
Increase: 62%

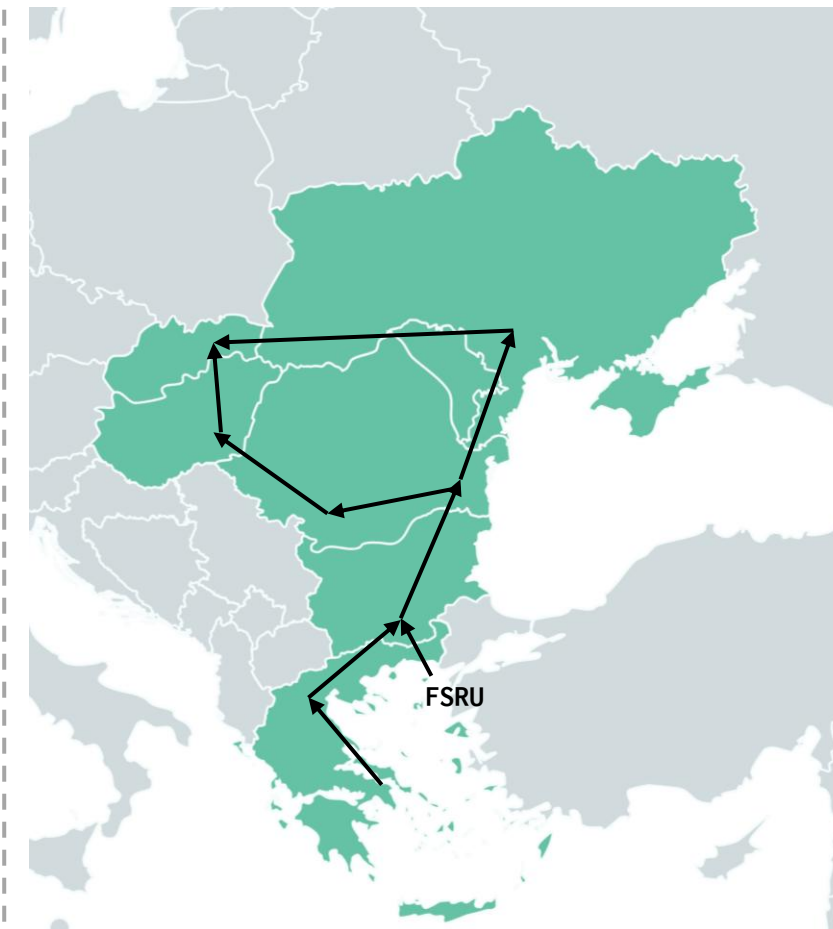
Monthly Natural Gas Exports (GWh) for Greece by exit point, [Jan 2025-Mar 2026]



Exports have experienced a more dramatic increase over the course of the past year

March 2025: 345.9
March 2026: 2,802.9
Increase 710%

The Vertical Corridor



- 7 countries connected
- 10 bcm/year potential capacity
- 2 LNG entry points in Greece
- 3 major gas routes currently tested

Greece's natural gas imports have shown sustained growth over recent months, driven by diversified supply sources through LNG infrastructure and strategic pipeline entry points such as Sidirokastro and Agia Triada. This diversification strengthens national supply security while reinforcing Greece's position as a critical entry hub for natural gas flows into Southeast Europe.

Import Gateway Expansion

Through the development of the Vertical Corridor, Greece is emerging as a key strategic energy bridge between global LNG markets and the Balkans, Central, and Eastern Europe. By facilitating northbound gas transportation, the corridor strengthens diversification efforts, reduces dependency on traditional eastern supply routes, and enhances Europe's long-term geopolitical energy resilience.

Vertical Corridor Catalyst

Export Momentum Rising

The sharp rise in natural gas exports underscores Greece's rapid evolution from a primarily consumption-based market into an increasingly influential regional transit and re-export center. Enhanced outbound flows to neighboring countries demonstrate Greece's expanding role in balancing regional gas markets and supporting broader Southeast European energy stability.

Regional Energy Backbone

Supported by expanding LNG facilities, multiple cross-border interconnections, and growing transit capacity, Greece is steadily establishing itself as a cornerstone of Southeast Europe's natural gas architecture. Its infrastructure expansion not only boosts domestic resilience but also positions the country as a foundational pillar in Europe's broader strategy for secure, flexible, and diversified energy networks.



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