

Mediterranean Geoeconomic Outlook 2026–2030

Trade, Energy and Strategic Corridors between Europe and North Africa

Strategic Intelligence Report

Key Strategic Insights

- The Mediterranean is rapidly re-emerging as one of the most critical geoeconomic corridors of the coming decade, linking European markets with North African energy resources, industrial production capacity and expanding consumer markets.
 - Global supply chain restructuring and geopolitical fragmentation are accelerating the strategic importance of regional trade corridors between Southern Europe and North Africa.
 - Energy transition policies across Europe are redefining the Mediterranean energy system, potentially transforming North Africa into a key supplier of renewable electricity and hydrogen to European markets.
 - Strategic competition among global and regional actors is increasing investment in Mediterranean infrastructure, ports and energy networks, turning the region into a growing arena of geoeconomic influence.
 - Spain occupies a uniquely advantageous position as a strategic gateway between Europe, Africa and Atlantic trade routes, with the potential to become a central hub in emerging Mediterranean logistics and energy corridors.
 - For companies operating in energy, logistics, infrastructure and investment, integrating geopolitical and geoeconomic intelligence into strategic planning will be critical to capture opportunities while managing regional risks.
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Executive Summary

The Mediterranean region is entering a new phase of strategic relevance within the global economic system.

Between 2026 and 2030, the convergence of geopolitical competition, supply chain restructuring and energy transition is likely to transform the Mediterranean into one of the most important geoeconomic corridors connecting Europe, Africa and the Middle East.

Historically perceived primarily as a geopolitical frontier, the Mediterranean is increasingly evolving into a **strategic economic system shaped by trade flows, energy networks and infrastructure investment**.

Several structural developments are driving this transformation.

First, global supply chains are undergoing a process of strategic reconfiguration. Companies and governments are seeking to diversify production networks and relocate manufacturing closer to European markets. This dynamic is accelerating economic integration between Southern Europe and North Africa.

Second, Europe's search for long-term energy security is reshaping the Mediterranean energy landscape. Renewable energy development in North Africa, combined with emerging hydrogen production and electricity interconnection projects, may position the region as a strategic partner for Europe's energy transition.

Third, demographic growth and industrial expansion across North Africa are gradually reinforcing the region's role as a natural economic partner for European markets, creating opportunities for logistics networks, infrastructure investment and regional trade development.

At the same time, the Mediterranean is becoming an arena of increasing geoeconomic competition. Global and regional actors are expanding their presence through investments in ports, transport corridors and energy infrastructure, reshaping economic influence across the region.

Within this evolving landscape, Spain occupies a uniquely advantageous position. Located at the intersection of the Atlantic Ocean and the Mediterranean Sea and in close proximity to North African markets, Spain is well positioned to emerge as a strategic gateway for trade, logistics and energy flows between Europe and Africa.

For companies operating in logistics, energy, infrastructure and international trade, understanding these geoeconomic dynamics will be essential to anticipate regional transformation, identify emerging opportunities and manage geopolitical risk.

The Mediterranean is therefore no longer merely a geopolitical frontier. It is rapidly becoming **one of Europe's most strategically important economic corridors for the coming decade**.

Target Audience

This report is particularly relevant for decision-makers in sectors directly exposed to geopolitical and geoeconomic dynamics in the Mediterranean region.

Potential readers include executives and strategy leaders from companies such as:

- Repsol
- Iberdrola
- Naturgy
- Maersk
- APM Terminals
- DP World
- BlackRock

These organisations regularly assess geopolitical risk, infrastructure investment opportunities and energy partnerships across the Mediterranean basin.

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1. Introduction

The Mediterranean as an Emerging Geoeconomic System

For much of the past three decades, the Mediterranean has been largely interpreted through a geopolitical lens: a frontier between Europe, North Africa and the Middle East, shaped by migration pressures, regional instability and security concerns. While these factors remain relevant, they no longer fully explain the strategic transformation currently underway across the region.

The Mediterranean is gradually re-emerging as one of the most significant geoeconomic systems shaping Europe's future.

Today, nearly **20 percent of global maritime trade passes through the Mediterranean basin**, making it one of the most critical maritime corridors in the global economy. At the same time, economic ties between the European Union and North Africa have expanded steadily, with annual trade flows exceeding **€300 billion**, reflecting a growing level of economic interdependence between both shores of the Mediterranean.

These developments are not coincidental. They are the result of several structural transformations reshaping the global economic landscape.

First, global supply chains are undergoing a process of strategic reconfiguration. In response to geopolitical tensions, logistical disruptions and rising economic fragmentation, companies are increasingly reassessing long-distance dependencies and exploring regional alternatives that offer greater resilience and proximity to European markets. Within this context, the Mediterranean is regaining strategic relevance as a space for nearshoring, industrial relocation and regional economic integration.

Second, the Mediterranean is becoming increasingly central to Europe's evolving energy architecture. As the European Union pursues diversification of supply and long-term decarbonisation objectives, the southern Mediterranean is emerging as a potential partner for renewable energy development, electricity interconnection and future hydrogen production.

North Africa alone possesses some of the **highest solar energy potential in the world**, and several large-scale renewable energy initiatives are already positioning the region as a potential contributor to Europe's long-term energy transition.

Third, the economic and demographic dynamics of North Africa are gradually reinforcing the region's strategic importance. With a population exceeding **200 million people** and a rapidly expanding urban middle class, North Africa is increasingly relevant not only as an energy partner but also as a neighbouring production base and emerging market for European industries.

These structural forces are transforming the Mediterranean into something more than a traditional geopolitical frontier. Increasingly, the region is evolving into a **strategic economic corridor linking European industrial systems, North African resources and emerging trade flows between Europe, Africa and the Middle East**.

At the same time, this transformation is taking place in a context of intensifying geoeconomic competition. Infrastructure investment, port development, energy projects and trade partnerships across the Mediterranean basin are increasingly influenced by broader strategic considerations and the presence of multiple regional and global actors.

Within this evolving landscape, Spain occupies a uniquely advantageous position. Located at the intersection of the Atlantic Ocean and the Mediterranean Sea, and separated from North Africa by only fourteen kilometres at the Strait of Gibraltar, Spain represents one of the most important gateways for trade, logistics and energy flows between Europe and Africa.

Each year, more than **100,000 vessels transit the Strait of Gibraltar**, making it one of the busiest maritime chokepoints in the world. This geographical reality reinforces Spain's potential role as a central node within emerging Mediterranean trade and energy corridors.

For companies operating in sectors such as logistics, infrastructure, energy and international trade, the implications are significant.

The Mediterranean is no longer merely a peripheral zone of geopolitical uncertainty. It is increasingly becoming a **strategic economic system whose evolution will shape investment flows, trade routes and energy partnerships around Europe over the coming decade**.

Organisations capable of integrating geopolitical and geoeconomic intelligence into their strategic decision-making will be better positioned to anticipate regional transformation, identify emerging opportunities and manage the complex risk environment that characterises the Mediterranean today.

This report examines the structural forces driving this transformation and assesses their implications for companies seeking to operate, invest or strategically position themselves in the Mediterranean region between now and 2030.

2. Structural Drivers of Change in the Mediterranean Region

The transformation of the Mediterranean into an increasingly relevant geoeconomic corridor is not the result of a single development. It is the outcome of several structural forces that are gradually reshaping the economic and strategic landscape of the region.

Understanding these drivers is essential for companies seeking to anticipate future developments rather than merely react to short-term events.

Three structural dynamics are particularly important in shaping the Mediterranean system between 2026 and 2030.

2.1 Global Supply Chain Reconfiguration

The first driver is the ongoing restructuring of global supply chains.

Over the past decade, geopolitical tensions, trade disruptions and logistical bottlenecks have exposed the vulnerabilities of highly concentrated global production networks. The pandemic, combined with subsequent geopolitical tensions affecting key maritime routes, accelerated a broader reassessment of supply chain resilience among governments and corporations.

As a result, companies are increasingly exploring strategies such as **nearshoring, regionalisation and supplier diversification**.

Within this context, the Mediterranean region is regaining relevance as a space where production, logistics and consumption can be integrated more closely within the European economic system.

North Africa, in particular, is attracting growing attention as a potential manufacturing and industrial partner for Europe. Countries such as Morocco, Tunisia and Egypt have already positioned themselves as important hubs for sectors such as automotive components, textiles and industrial manufacturing.

This shift is reinforced by geographic proximity. Maritime transport between Southern Europe and North Africa can often be completed within **one to three days**, compared with several weeks for intercontinental supply chains.

For European companies seeking greater resilience and shorter production cycles, the Mediterranean offers a natural framework for regional economic integration.

2.2 Energy Transition and Strategic Energy Partnerships

The second major driver reshaping the Mediterranean region is the transformation of Europe's energy system.

Europe's commitment to decarbonisation and energy diversification is fundamentally altering the strategic geography of energy supply. As traditional energy dependencies are reconsidered, the Mediterranean basin is emerging as a key space for new energy partnerships.

North Africa possesses some of the world's most favourable conditions for renewable energy generation, particularly solar and wind power. Large-scale renewable energy projects across Morocco, Egypt and other parts of the region are increasingly attracting international investment.

In addition to renewable electricity generation, the region is gaining attention as a potential producer of **green hydrogen**, a resource expected to play a growing role in Europe's future energy mix.

Several proposed infrastructure initiatives aim to connect North African energy production with European demand through electricity interconnections, hydrogen pipelines and maritime transport routes.

If successfully developed, these projects could transform the Mediterranean into one of the most important corridors linking renewable energy production zones with European industrial demand.

For companies involved in energy infrastructure, project development and industrial decarbonisation, the Mediterranean energy system may represent one of the most significant investment frontiers of the coming decade.

2.3 Demographic and Economic Growth in North Africa

The third structural driver is the evolving demographic and economic landscape of North Africa.

The region's population currently exceeds **200 million people** and is expected to continue expanding over the coming decades. Urbanisation, rising levels of education and gradual industrial development are contributing to the emergence of a growing middle class across several North African economies.

This demographic momentum is gradually transforming the region from a peripheral economic partner into a neighbouring market with increasing relevance for European industries.

At the same time, economic reforms and industrial policy initiatives in several countries are seeking to attract foreign investment and strengthen export-oriented sectors.

As infrastructure improves and regional trade networks expand, North Africa may increasingly function not only as a production platform for European supply chains but also as a significant market for goods, services and infrastructure development.

These demographic and economic trends reinforce the Mediterranean's potential as a space of **economic complementarity between Europe's industrial base and North Africa's growing production capacity and markets**.

Strategic Implications

Taken together, these three structural drivers — supply chain restructuring, energy transition and demographic growth — are gradually reshaping the Mediterranean into a more integrated economic system.

While political uncertainty and regulatory complexity remain relevant considerations, the long-term trajectory suggests that the Mediterranean is moving toward greater economic interdependence between its northern and southern shores.

For companies capable of anticipating these shifts, the region offers significant opportunities in sectors such as logistics, energy infrastructure, industrial production and regional trade development.

Understanding these structural forces is therefore essential for organisations seeking to position themselves advantageously within the evolving Mediterranean geoeconomic landscape.

3. Trade and Logistics Corridors

The Reconfiguration of Mediterranean Commerce

The Mediterranean has historically been one of the world's most important maritime corridors. Today, shifting trade patterns and evolving supply chain strategies are reinforcing its strategic role in the global economy.

Approximately **20–25 percent of global maritime trade** passes through the Mediterranean basin each year, making it one of the most critical maritime regions for international commerce. This importance is further reinforced by the presence of major strategic chokepoints, particularly the **Suez Canal** and the **Strait of Gibraltar**, which together connect Europe with Asia, Africa and the Atlantic trade routes.

In recent years, these trade flows have become increasingly complex. Beyond traditional East–West maritime routes linking Asia and Europe, the Mediterranean is witnessing the gradual expansion of **North–South trade corridors connecting Europe and Africa**.

These emerging corridors reflect a broader transformation in regional economic relations.

3.1 Maritime Trade Routes and Strategic Shipping Lanes

The Mediterranean serves as a central node in global maritime logistics.

Each year, more than **120,000 vessels transit through the Mediterranean Sea**, connecting major global shipping routes between Asia, Europe and the Americas. The **Suez Canal alone handles approximately 12–15 percent of global trade**, reinforcing the strategic importance of the eastern Mediterranean in global logistics networks.

At the western entrance to the Mediterranean, the **Strait of Gibraltar remains one of the busiest maritime passages in the world**, with more than **100,000 ships transiting annually** between the Atlantic Ocean and the Mediterranean Sea.

These maritime corridors form the backbone of global container traffic, energy shipments and bulk commodity flows.

For shipping companies, logistics operators and port authorities, the Mediterranean therefore represents not only a transit zone but also a strategic network of **logistics hubs and maritime gateways**.

3.2 The Rise of Regional Trade Between Europe and North Africa

Alongside global East–West maritime flows, regional trade between Europe and North Africa has expanded steadily.

Total trade between the European Union and North African countries now exceeds **€300 billion annually**, reflecting a growing degree of economic integration between both sides of the Mediterranean.

Several sectors are driving this increase in regional trade:

- automotive manufacturing and components
- textiles and industrial manufacturing
- agricultural products and food supply chains
- energy and electricity interconnection.

Countries such as **Morocco, Tunisia and Egypt** have become increasingly important industrial partners for European markets, particularly for sectors that benefit from geographic proximity and relatively short transport times.

In many cases, maritime transport between Southern Europe and North African ports can be completed within **24 to 72 hours**, allowing companies to integrate production networks across the Mediterranean basin more efficiently than traditional long-distance supply chains.

This growing regional integration is gradually transforming the Mediterranean into a **nearshoring platform for European industry**.

3.3 Port Infrastructure and Logistics Hub Development

The reconfiguration of Mediterranean trade is also reflected in major investments in port infrastructure and logistics hubs across the region.

Several Mediterranean ports have experienced rapid expansion over the past decade as governments and private investors seek to capture growing trade flows.

Among the most prominent examples is **Tanger Med in Morocco**, which has emerged as one of the largest container ports in the Mediterranean. The port handled **over 8 million TEUs in recent years**, positioning it among the top container hubs connecting Europe, Africa and global shipping routes.

Similarly, major ports in Southern Europe such as **Algeciras, Valencia and Barcelona** continue to play central roles in container traffic and logistics distribution within the European market.

These ports are not only maritime gateways but also critical nodes within broader logistics systems that integrate maritime transport with rail, road and industrial supply chains.

As investment in port capacity, logistics infrastructure and intermodal connectivity continues to expand, the Mediterranean is increasingly functioning as a **logistics platform linking three continents**.

Strategic Implications for Business

For companies operating in logistics, maritime transport, infrastructure and international trade, the reconfiguration of Mediterranean commerce presents several strategic implications.

First, the growing importance of regional trade between Europe and North Africa may increase demand for **short-sea shipping services and regional logistics networks**.

Second, the expansion of port infrastructure across the Mediterranean basin is creating new opportunities for **port operators, infrastructure investors and logistics providers**.

Third, the development of industrial ecosystems in North Africa may accelerate the integration of supply chains across the Mediterranean, reinforcing the region's role as a **strategic manufacturing and distribution corridor for European markets**.

Taken together, these developments suggest that the Mediterranean is gradually evolving from a transit space within global trade routes into a **central logistics system connecting Europe, Africa and global maritime networks**.

For decision-makers in sectors such as shipping, port infrastructure, logistics and international trade, understanding the evolving structure of Mediterranean commerce will be essential to identify opportunities and manage emerging competitive dynamics.

4. Energy Geopolitics in the Mediterranean Basin

The Emerging Mediterranean Energy System

Energy is rapidly becoming one of the defining strategic dimensions of the Mediterranean region.

As Europe continues to pursue energy diversification and long-term decarbonisation, the Mediterranean basin is emerging as a critical space for future energy partnerships linking European demand with North African production capacity.

The region already plays a significant role in Europe's energy supply. North African countries – particularly **Algeria and Libya** – have historically been among Europe's most important suppliers of natural gas. Algeria alone accounts for a significant share of pipeline gas imports into Southern Europe, primarily through the **TransMed pipeline connecting Algeria with Italy** and the **Medgaz pipeline linking Algeria directly with Spain**.

However, the Mediterranean energy landscape is now entering a period of structural transformation driven by three major dynamics: energy diversification, renewable energy expansion and the emergence of hydrogen as a future energy carrier.

4.1 The Mediterranean Gas System

Despite the ongoing energy transition, natural gas remains a critical component of Europe's energy mix and is expected to play an important role during the transition period toward lower-carbon energy systems.

The Mediterranean basin hosts several key gas supply routes connecting North Africa and the Eastern Mediterranean with European markets.

Algeria remains one of Europe's most important gas suppliers outside Norway, exporting significant volumes to European markets through both pipeline infrastructure and liquefied natural gas (LNG) shipments.

In addition, the **Eastern Mediterranean has gained increasing attention following major offshore gas discoveries**, including the Leviathan and Zohr fields, which have reinforced the strategic importance of energy resources across the region.

These developments are gradually reshaping the Mediterranean into a complex energy network where gas production, LNG infrastructure and pipeline systems intersect with geopolitical and economic considerations.

4.2 Renewable Energy Potential in North Africa

While hydrocarbons remain relevant in the short term, the long-term transformation of the Mediterranean energy system will likely be driven by renewable energy development.

North Africa possesses some of the most favourable conditions for renewable energy production anywhere in the world. Vast solar irradiation levels across countries such as Morocco, Algeria and Egypt create significant potential for large-scale solar energy generation.

In addition to solar resources, several coastal areas also offer favourable conditions for wind energy development.

Over the past decade, governments across the region have launched ambitious renewable energy programmes aimed at expanding generation capacity and attracting international investment.

For European companies involved in renewable energy development, project finance and infrastructure investment, North Africa may represent one of the most promising expansion frontiers within Europe's broader energy transition.

4.3 Hydrogen and Future Energy Corridors

One of the most significant developments in the emerging Mediterranean energy system is the growing interest in **green hydrogen**.

Hydrogen is expected to play an important role in Europe's decarbonisation strategy, particularly in sectors that are difficult to electrify, such as heavy industry, chemicals and certain transport segments.

Several European governments and energy companies are exploring the potential for importing hydrogen from regions with abundant renewable energy resources. North Africa, with its combination of solar potential, available land and geographic proximity to Europe, is increasingly viewed as a candidate for large-scale hydrogen production.

Several proposed projects and strategic initiatives are exploring the possibility of establishing **hydrogen corridors linking North Africa with Southern Europe** through pipelines, maritime transport and electricity interconnections.

If successfully developed, these projects could transform the Mediterranean into one of the most important corridors connecting renewable energy production zones with European industrial demand.

Strategic Implications for Energy and Infrastructure Investors

The transformation of the Mediterranean energy system presents a wide range of strategic implications for companies and investors.

First, the diversification of European energy supply will likely increase the strategic relevance of Mediterranean partnerships in both gas and renewable energy development.

Second, the expansion of renewable energy projects in North Africa may generate significant demand for infrastructure investment, including electricity interconnections, transmission networks and hydrogen transport systems.

Third, the emergence of hydrogen as a potential energy carrier could reshape existing energy infrastructure and create new industrial ecosystems linking production zones in North Africa with industrial demand in Europe.

Taken together, these dynamics suggest that the Mediterranean may become one of the most strategically important energy regions for Europe's transition toward a lower-carbon and more diversified energy system.

For energy companies, infrastructure developers and institutional investors, understanding the evolving geopolitical and economic dynamics of the Mediterranean energy system will be essential to identify opportunities and manage long-term investment risks.

5. Political Risk and Strategic Stability in the Mediterranean Region

While the Mediterranean presents significant economic opportunities, the region is also characterised by complex political dynamics that continue to shape the investment environment.

For companies operating in sectors such as energy, logistics, infrastructure and international trade, understanding the political and institutional landscape of the region is essential. Political developments influence regulatory frameworks, investment conditions, trade relations and the long-term stability of strategic projects.

The Mediterranean basin therefore represents a space where economic opportunity and geopolitical uncertainty coexist.

Three factors are particularly relevant for assessing political risk in the region.

5.1 Institutional Stability and Governance Dynamics

Political stability varies significantly across the Mediterranean region, particularly between the northern and southern shores.

Countries in Southern Europe operate within the institutional framework of the European Union, which provides regulatory stability, predictable legal systems and access to integrated markets.

In contrast, several countries in North Africa continue to experience evolving governance structures, political reforms and institutional transitions.

While these dynamics can create uncertainty for investors, they also reflect broader processes of political and economic transformation across the region.

For companies entering these markets, understanding local institutional frameworks, regulatory processes and governance structures is critical for managing long-term investment risk.

Projects in sectors such as infrastructure, energy and logistics often involve partnerships with public institutions, making political and regulatory environments a central consideration in project development.

5.2 Regulatory Risk and Investment Frameworks

Beyond political stability, regulatory frameworks play a crucial role in shaping the business environment across the Mediterranean region.

Investment conditions vary significantly from country to country, particularly with regard to foreign investment regulations, licensing procedures and public–private partnerships.

In recent years, several North African governments have introduced reforms aimed at attracting foreign investment, expanding industrial sectors and strengthening export-oriented economic models.

However, regulatory environments can still evolve rapidly, particularly in sectors such as energy, infrastructure and telecommunications, where strategic industries often remain closely linked to national development strategies.

For international investors and project developers, this means that regulatory risk must be assessed alongside market opportunity.

Understanding not only current regulatory frameworks but also the **direction of policy development** is essential for companies seeking to establish long-term operations in the region.

5.3 Geopolitical Competition and Strategic Influence

The Mediterranean is increasingly shaped by broader geopolitical dynamics involving both regional and global actors.

Infrastructure investment, energy partnerships and trade agreements are often influenced not only by economic considerations but also by strategic interests and geopolitical positioning.

Several international actors have expanded their economic presence in the Mediterranean basin through investments in port infrastructure, logistics networks, energy projects and transport corridors.

These developments are gradually transforming the region into a space of **geoeconomic competition**, where infrastructure, energy connectivity and trade access can carry strategic significance beyond their immediate commercial value.

For companies operating in sectors closely linked to infrastructure and energy systems, understanding these dynamics is essential for anticipating shifts in the competitive landscape.

Projects that appear purely commercial may increasingly intersect with broader strategic considerations, including national energy security, trade policy and regional partnerships.

Strategic Implications for Investors and Companies

The Mediterranean investment environment cannot be understood solely through traditional economic indicators.

Political stability, regulatory frameworks and geopolitical dynamics play a critical role in shaping the viability and long-term sustainability of projects across the region.

Companies seeking to operate in the Mediterranean basin must therefore adopt a strategic approach that integrates:

- geopolitical analysis
- regulatory risk assessment
- long-term partnership strategies.

Those organisations capable of navigating these political and institutional complexities will be better positioned to capture the significant economic opportunities emerging across the Mediterranean region.

6. Spain as a Strategic Gateway Between Europe and Africa

Geography, History and Strategic Position

Spain occupies one of the most strategically consequential positions in the Mediterranean system. Few countries combine the same degree of geographic proximity, historical interaction and logistical connectivity with North Africa.

At its narrowest point, the **Strait of Gibraltar separates Europe and Africa by only 14 kilometres**, making it one of the closest continental interfaces in the world. This corridor is also one of the busiest maritime passages globally: more than **100,000 vessels transit the strait each year**, connecting Atlantic trade routes with the Mediterranean basin and onward toward the Suez Canal and Asian markets.

Because of this geographic position, Spain has historically functioned as a **natural maritime gateway linking three economic systems: the Atlantic, the Mediterranean and North Africa**.

However, Spain's Mediterranean orientation is not purely geographic. It is also deeply historical and structural.

6.1 Historical Mediterranean Integration

For centuries, the Iberian Peninsula has been deeply integrated into the Mediterranean political and economic system. Trade, diplomacy and cultural exchange across the western Mediterranean have historically linked Spain with North Africa, Italy and other Mediterranean societies.

This interaction intensified during several historical periods, including the long coexistence and interaction between Iberian and North African societies during the medieval period, when the western Mediterranean functioned as a highly interconnected commercial and political space.

Even in modern history, Spain maintained significant administrative and economic presence in North Africa. Spanish territories such as **Ceuta and Melilla**, which remain Spanish cities today, represent enduring institutional links across the Mediterranean.

During the nineteenth and twentieth centuries Spain also administered the **Spanish Protectorate in Morocco (1912–1956)** and maintained colonial administration in **Spanish Sahara until 1975**, reinforcing long-standing political, economic and logistical connections between Spain and North Africa.

These historical links have created networks of familiarity, institutional knowledge and economic interaction that continue to influence relations between Spain and North African countries today.

6.2 Economic and Trade Relations with North Africa

Spain has developed particularly strong economic relations with North Africa, especially Morocco.

Morocco has become one of Spain's most important trading partners. Bilateral trade between Spain and Morocco now exceeds **€20 billion annually**, reflecting deep integration across sectors such as automotive manufacturing, agriculture, textiles and industrial components.

The logistics structure of this relationship is also highly developed. Maritime connections between Spanish and Moroccan ports are among the most active short-sea shipping routes in Europe.

The **Algeciras–Tangier corridor**, for example, represents one of the most important maritime logistics routes in the Mediterranean, facilitating both freight transport and passenger traffic across the Strait of Gibraltar.

Similarly, the port of **Tanger Med**, located directly across from Algeciras, has become one of the largest container ports in the Mediterranean, handling more than **8 million TEUs annually** and serving as a major industrial and logistics hub linking African manufacturing with European markets.

These logistical networks allow goods to move between Spain and Morocco in **less than 24 hours**, creating one of the fastest cross-continental trade systems anywhere in the world.

6.3 Spain's Mediterranean Logistics System

Spain's strategic value within the Mediterranean is reinforced by the scale and sophistication of its logistics infrastructure.

Major Spanish ports rank among the most important maritime hubs in Europe:

- **Port of Algeciras** – one of the largest container ports in the Mediterranean and a key transshipment hub at the entrance to the Mediterranean.
- **Port of Valencia** – the largest container port in Spain and one of the busiest in Europe.
- **Port of Barcelona** – a major logistics gateway linking Mediterranean shipping routes with European industrial markets.

These ports are integrated into extensive logistics networks connecting maritime transport with rail, road and industrial production systems across the Iberian Peninsula and wider European markets.

Because of this infrastructure, Spain functions as a **logistical bridge between Atlantic trade routes, Mediterranean maritime corridors and emerging North African production hubs**.

6.4 Spain as Part of the Mediterranean Strategic System

Spain's historical and economic orientation toward the Mediterranean also places it within a broader group of Mediterranean powers that share similar strategic characteristics.

Countries such as **Italy, Croatia and Greece** also operate within this Mediterranean strategic system, where maritime geography, regional trade networks and historical links with North Africa and the eastern Mediterranean shape economic and political dynamics.

These countries share structural similarities:

- strong maritime traditions
- strategic port infrastructure
- historical engagement with Mediterranean trade routes
- proximity to North Africa and Middle Eastern energy corridors.

In contrast, northern European economies such as France, Germany or the Netherlands have historically been more oriented toward Atlantic and continental trade networks.

This difference reinforces the importance of Southern European countries in shaping Europe's strategic engagement with the Mediterranean region.

Strategic Implications

Spain's role in the Mediterranean cannot be understood solely in terms of geography. It is the product of a combination of geographic proximity, historical interaction, economic integration and logistical infrastructure.

Taken together, these factors position Spain as one of the most important **gateway economies connecting European markets with North Africa and the wider Mediterranean system.**

As economic integration between Europe and North Africa continues to deepen over the coming decade, Spain may increasingly function as a strategic platform for companies seeking to access both markets.

For businesses operating in sectors such as logistics, energy, infrastructure and international trade, Spain's location and historical connections provide a unique vantage point within the evolving Mediterranean geoeconomic landscape.

7. Geoeconomic Competition in the Mediterranean Basin

Infrastructure, Trade and Strategic Influence

The Mediterranean is increasingly evolving into a space of geoeconomic competition where infrastructure, energy systems and trade corridors intersect with broader strategic interests.

Over the past decade, investment in ports, logistics networks and energy infrastructure across the Mediterranean basin has accelerated significantly. While these projects often appear purely commercial, they are frequently shaped by broader geopolitical considerations and long-term strategic positioning.

As a result, the Mediterranean is gradually becoming an arena where global and regional actors compete for influence through economic presence rather than direct political confrontation.

This dynamic is particularly visible in three areas: infrastructure investment, energy partnerships and strategic trade corridors.

7.1 Infrastructure Investment and Maritime Influence

Port infrastructure has become one of the primary instruments through which states and investors expand their economic presence in the Mediterranean.

Major ports across the region have experienced significant expansion in recent years as governments seek to position themselves within global logistics networks.

Among the most prominent examples is **Tanger Med in Morocco**, which has rapidly emerged as one of the largest container ports in the Mediterranean. Handling more than **8 million TEUs annually**, the port has become a key logistics platform linking African industrial production with European markets and global shipping routes.

Similarly, ports in Southern Europe such as **Algeciras, Valencia and Barcelona** continue to expand their role as strategic logistics hubs connecting Atlantic routes with Mediterranean shipping lanes.

Beyond these traditional actors, external investors have also shown increasing interest in Mediterranean infrastructure. International investment in port facilities, logistics zones and transport corridors reflects the growing recognition that control over infrastructure networks can shape long-term trade flows.

As global trade patterns evolve, the ports and logistics hubs that succeed in capturing new shipping routes will likely play an increasingly strategic role within the Mediterranean economic system.

7.2 Energy Partnerships and Strategic Connectivity

Energy cooperation is another area where geoeconomic competition is becoming increasingly visible.

The Mediterranean hosts a complex network of gas pipelines, electricity interconnections and emerging hydrogen initiatives linking North Africa, Southern Europe and the Eastern Mediterranean.

Pipeline systems such as **TransMed**, connecting Algeria with Italy, and **Medgaz**, linking Algeria with Spain, illustrate how energy infrastructure already connects the northern and southern shores of the Mediterranean.

At the same time, the development of renewable energy and hydrogen production across North Africa is attracting growing international interest.

Countries with strong renewable resources are exploring partnerships with European energy companies and infrastructure investors to develop new energy corridors that could supply European markets in the coming decades.

As these projects develop, the Mediterranean may increasingly function as a **strategic energy bridge between Africa's renewable energy potential and Europe's industrial demand**.

7.3 Competing Economic Networks in the Mediterranean

The Mediterranean is also witnessing the emergence of multiple overlapping economic networks shaped by different regional and global actors.

Infrastructure investment, energy projects and trade partnerships are gradually creating a complex web of economic relationships linking Europe, North Africa and the Middle East.

In recent years, several actors have increased their economic presence in the region through investments in ports, logistics corridors and industrial zones.

These developments reflect a broader recognition that the Mediterranean occupies a central position within emerging trade routes connecting Europe with Africa and Asia.

Rather than a single dominant economic system, the region is increasingly characterised by **overlapping spheres of economic influence**, where infrastructure development, trade agreements and investment partnerships interact with broader strategic interests.

7.4 The European Union as a Regulatory Power in the Mediterranean System

Any assessment of the Mediterranean geoeconomic landscape must also consider the role of the European Union as one of the most influential regulatory actors shaping economic activity in the region.

Unlike many other global powers, the European Union exercises much of its influence not through direct geopolitical projection but through **regulatory frameworks that shape trade, energy systems and industrial policy**.

European policies affecting energy transition, climate regulation, environmental standards and trade agreements have a direct impact on the development of Mediterranean economic corridors.

For example, the EU's long-term climate strategy and decarbonisation targets are accelerating the transformation of the regional energy system. Policies aimed at reducing carbon emissions are encouraging investment in renewable energy, hydrogen infrastructure and cross-border electricity interconnections linking Europe with neighbouring regions.

At the same time, regulatory mechanisms such as environmental standards, emissions regulations and industrial policy frameworks influence the competitiveness of European companies operating in energy-intensive sectors.

For companies and investors, these regulatory dynamics create a complex environment where economic opportunity is closely tied to policy direction.

In the Mediterranean context, the European Union's regulatory framework often acts as both a **driver of transformation and a constraint on certain industrial activities**, shaping the pace and direction of energy and infrastructure development across the region.

For Southern European economies such as Spain and Italy, these dynamics can be particularly significant. While EU policies support the development of renewable energy systems and cross-border energy networks, they also impose regulatory requirements that influence how rapidly infrastructure projects, energy investments and industrial initiatives can be implemented.

Understanding the interaction between EU regulation, national policy and regional economic dynamics is therefore essential for companies seeking to navigate the Mediterranean investment landscape.

For businesses operating in energy, logistics and infrastructure sectors, strategic planning increasingly requires not only an understanding of market conditions but also careful anticipation of regulatory developments emerging from European institutions.

Strategic Implications for Business and Investment

The growing geoeconomic competition in the Mediterranean has important implications for companies operating in sectors such as logistics, infrastructure, energy and international trade.

First, infrastructure development across the region will likely reshape the geography of Mediterranean trade over the coming decade. Ports and logistics hubs capable of attracting shipping routes and industrial investment may emerge as key nodes within global supply chains.

Second, the expansion of energy partnerships and renewable energy initiatives may create significant opportunities for companies involved in infrastructure development, project finance and industrial decarbonisation.

Third, the increasing strategic importance of the Mediterranean suggests that companies will need to integrate geopolitical awareness into their long-term investment strategies.

Projects in sectors such as ports, energy infrastructure and transport corridors are likely to intersect increasingly with broader strategic considerations.

Understanding the evolving balance between commercial opportunity and geoeconomic competition will therefore be essential for organisations seeking to operate successfully within the Mediterranean basin.

8. Strategic Opportunities for European Companies

Investment, Infrastructure and Emerging Regional Markets

The evolving geoeconomic dynamics of the Mediterranean are creating a range of opportunities for European companies across several strategic sectors.

As trade flows expand, energy systems transform and infrastructure networks develop, the region is gradually emerging as one of the most important economic interfaces between Europe, Africa and the Middle East.

For businesses capable of navigating geopolitical complexity and regulatory frameworks, the Mediterranean may represent one of the most promising investment frontiers of the coming decade.

Three sectors in particular stand out as key areas of opportunity.

8.1 Logistics and Maritime Transport

The restructuring of global supply chains and the growth of regional trade between Europe and North Africa are increasing demand for logistics services across the Mediterranean.

Short-sea shipping routes linking Southern European ports with North African industrial hubs are becoming increasingly relevant as companies seek faster and more resilient supply chains.

Maritime transport between Spain, Italy and North Africa can often be completed in **less than 48 hours**, offering a significant advantage compared with long-distance global shipping routes.

Ports such as **Algeciras, Valencia, Barcelona and Tanger Med** are already positioning themselves as central nodes within these emerging logistics corridors.

For companies operating in shipping, port management and logistics infrastructure, this trend is likely to generate opportunities in:

- short-sea shipping networks
- port infrastructure development
- intermodal logistics platforms connecting maritime routes with European rail and road networks.

8.2 Energy Infrastructure and Renewable Energy Investment

The transformation of Europe's energy system is also generating significant opportunities across the Mediterranean basin.

North Africa's renewable energy potential, particularly in solar and wind generation, has attracted increasing interest from European energy companies and infrastructure investors.

Large-scale renewable energy projects, combined with future hydrogen production initiatives, may position the region as a strategic supplier of low-carbon energy to European markets.

Several infrastructure initiatives are exploring electricity interconnections and hydrogen transport corridors linking North Africa with Southern Europe.

For companies operating in sectors such as energy infrastructure, project development and industrial decarbonisation, these developments may create opportunities in:

- renewable energy generation
- energy transmission infrastructure
- hydrogen production and transport systems.

As Europe continues to pursue decarbonisation and energy diversification, the Mediterranean may increasingly function as a **strategic bridge between renewable energy production zones and European industrial demand**.

8.3 Industrial Development and Nearshoring

One of the most significant economic transformations in the Mediterranean is the gradual emergence of North Africa as a potential nearshoring destination for European industries.

Countries such as **Morocco, Tunisia and Egypt** have already attracted substantial investment in sectors such as automotive manufacturing, textiles and industrial components.

Industrial zones linked to major logistics hubs, particularly around ports such as **Tanger Med**, are facilitating the integration of production networks across the Mediterranean.

This dynamic is reinforced by geographic proximity and relatively short transport times between Southern Europe and North Africa.

For European manufacturers seeking to reduce supply chain risk while maintaining proximity to European markets, the Mediterranean region offers a viable alternative to distant production hubs.

8.4 Trade Flows, Export Dependence and Strategic Market Exposure

Any serious assessment of Mediterranean opportunities must also consider the structure of export flows linking Spain, the European Union, Africa and the Gulf.

Trade volumes matter, but trade direction matters even more. For companies assessing long-term positioning, the key issue is not only how much is traded, but **which regions are becoming strategically more interdependent, and where future dependence may generate either leverage or vulnerability.**

Spain provides a particularly relevant case.

In 2024, Spanish goods exports reached **€384.5 billion**, while imports totalled **€424.7 billion**, confirming the scale of Spain's integration into global and regional trade networks. Spain's external sector remains deeply anchored in the European Union, but its southern projection is increasingly relevant, particularly through trade with Morocco and the wider Mediterranean space.

Morocco has become one of Spain's most important non-EU trading partners and one of the clearest examples of deepening cross-Mediterranean integration. Bilateral trade between Spain and Morocco has surpassed **€20 billion annually**, supported by strong links in automotive components, agri-food, textiles, consumer goods and industrial manufacturing. This relationship is not merely commercial; it is increasingly logistical and industrial, with production systems on both shores of the Strait of Gibraltar becoming more closely interconnected.

At the broader European level, the European Union's trade profile illustrates why the Mediterranean is strategically relevant. In 2024, the EU registered a **€147 billion surplus in goods trade**, underlining the bloc's continuing export strength. Extra-EU exports remain heavily concentrated in machinery, transport equipment, chemicals and other higher-value industrial goods, while import dependence is still stronger in energy and certain raw materials.

This matters because the Mediterranean increasingly connects **European industrial exports with North African energy resources, labour pools and growing consumer markets.** The relationship is not symmetrical: Europe tends to export higher-value manufactured goods and technology, while North Africa and parts of Africa remain more exposed to commodity and energy exports. That asymmetry creates both opportunity and strategic tension.

The Gulf adds another important layer.

In 2024, total EU trade in goods with the GCC reached **€161.7 billion**. EU exports to the Gulf were approximately **€99.4 billion**, while imports from the GCC were about **€62.3 billion** according to the European Commission's regional trade page, and the EU's own trade factsheet shows exports of **€99.4 billion** and imports of **€62.3 billion** for 2024. Fuel and mining products still dominated EU imports from the Gulf, accounting for roughly **75%** of

those imports, while EU exports to the GCC were far more diversified and included machinery, transport equipment, chemicals and agri-food products.

This trade pattern is strategically significant. It shows that Europe's relationship with the Gulf is not simply one of energy dependence, but also one of strong industrial export orientation. For Mediterranean economies such as Spain and Italy, this creates an opportunity to position themselves not only as southern European markets, but as **gateway platforms linking European manufacturing capacity with Gulf demand and African growth corridors**. That opportunity, however, depends heavily on infrastructure, regulatory coherence and maritime competitiveness.

Africa's export structure remains more vulnerable.

UNCTAD notes that African trade is still highly exposed to external shocks and remains strongly concentrated in a relatively narrow range of products and destinations, with commodity dependence continuing to shape much of the continent's trade profile. This is precisely why Mediterranean trade corridors matter: they may help shift parts of Africa's external trade away from pure commodity dependency toward **more regionalised, industrial and value-added exchange with Europe and neighbouring markets**.

For business and investment strategy, three implications stand out.

First, **Spain's export position gives it a natural role as a southern trade interface**: not large enough to dominate Europe alone, but exceptionally well located to intermediate flows between Europe, North Africa, the Atlantic and, increasingly, the Gulf.

Second, the European Union remains an industrial export power, but one whose competitiveness is increasingly shaped by energy costs, regulatory pressure and supply-chain security. This makes the Mediterranean not peripheral, but central to Europe's future trade resilience.

Third, Africa and the Gulf should not be analysed as secondary external markets alone. Both are becoming part of a broader strategic system in which trade, energy, logistics and industrial positioning are converging around the Mediterranean basin.

In other words, the future of the Mediterranean will not be determined solely by geography or politics. It will also be determined by **who captures export routes, who controls logistics gateways, and which economies succeed in converting proximity into long-term strategic advantage**.

9. Strategic Scenarios for 2030

Assessing the Future of the Mediterranean System

The evolution of the Mediterranean region toward 2030 will be shaped by the interaction between economic integration, regulatory frameworks, geopolitical competition and infrastructure investment.

While the region offers significant economic opportunities, its future trajectory will depend on the balance between three forces:

- the capacity of Europe and North Africa to deepen economic cooperation
- the regulatory and policy environment shaping energy, infrastructure and trade
- the degree of geopolitical competition influencing investment and strategic infrastructure.

Rather than assuming a single outcome, this report outlines three possible scenarios for the Mediterranean system.

The scenarios are presented **from the least probable to the most likely trajectory**, based on current economic, political and regulatory dynamics.

Scenario 1: Mediterranean Integration (Least Probable)

In this scenario, the Mediterranean evolves into a highly integrated economic corridor between Europe and North Africa.

European companies accelerate nearshoring strategies, relocating industrial production closer to European markets. North African economies successfully implement structural reforms, improve regulatory stability and attract large-scale foreign investment in manufacturing, infrastructure and energy.

Renewable energy and hydrogen projects across North Africa expand rapidly, supported by European technology and financing. Cross-Mediterranean electricity interconnections and hydrogen corridors begin supplying European industrial demand.

Trade flows between Europe and North Africa increase substantially, supported by improved infrastructure, coordinated economic policy and stable political relations.

Under this scenario, the Mediterranean emerges as a **fully integrated economic system linking European industry with North African energy resources and production capacity**.

However, while elements of this scenario are already visible, achieving this level of integration would require strong political alignment, stable regulatory frameworks and sustained investment cooperation across multiple jurisdictions.

Given the complexity of these conditions, this scenario remains possible but **less probable in the short to medium term**.

Scenario 2: Regional Fragmentation (Moderately Probable)

In this scenario, economic integration across the Mediterranean advances unevenly due to regulatory barriers, political uncertainty and infrastructure constraints.

Some sectors experience growth – particularly logistics and regional trade – but large-scale integration projects face delays due to policy uncertainty, financing challenges or regulatory complexity.

European regulatory frameworks, particularly in areas such as energy transition, environmental standards and industrial policy, create both incentives and constraints for cross-Mediterranean investment.

While these policies aim to accelerate decarbonisation and energy transformation, they can also increase compliance costs and slow the development of certain infrastructure projects.

Political transitions and regulatory changes in parts of North Africa further contribute to investment uncertainty, leading many companies to adopt cautious strategies focused on incremental expansion rather than large-scale regional integration.

Under this scenario, the Mediterranean remains an important maritime corridor, but its economic integration progresses slowly and unevenly.

Scenario 3: Geoeconomic Competition (Most Probable)

The most likely trajectory for the Mediterranean toward 2030 is one characterised by **increasing geoeconomic competition rather than full integration or fragmentation.**

In this scenario, the region becomes a strategic arena where multiple actors seek influence through investment, infrastructure development and energy partnerships.

Trade flows continue expanding, particularly between Europe and North Africa, driven by supply chain diversification and growing industrial capacity in the region.

However, economic integration occurs within a competitive environment where infrastructure projects, energy corridors and logistics networks increasingly intersect with broader strategic interests.

Regulatory frameworks within the European Union continue to shape investment conditions across Southern Europe, particularly in energy, infrastructure and industrial sectors. These policies influence the pace and direction of development while also affecting the competitiveness of European companies.

At the same time, sovereign wealth funds, international infrastructure investors and multinational corporations expand their economic presence across Mediterranean ports, energy projects and industrial zones.

Under this scenario, the Mediterranean evolves into a **complex geoeconomic system characterised by overlapping economic networks, strategic infrastructure competition and diversified investment flows**.

For companies and investors, success in this environment will depend on the ability to navigate regulatory frameworks, identify emerging trade corridors and build partnerships across multiple jurisdictions.

Strategic Interpretation

Across all scenarios, one conclusion remains consistent: the Mediterranean is becoming an increasingly important strategic space linking Europe, Africa and global trade networks.

However, the region's future will likely be defined less by political integration and more by **competition for economic influence through infrastructure, trade and energy systems**.

For companies operating in logistics, energy, infrastructure and international trade, the key challenge will be to anticipate these dynamics and position themselves within the emerging geoeconomic architecture of the Mediterranean basin.

Organisations capable of integrating geopolitical awareness, regulatory analysis and long-term market intelligence into their strategic planning will be best positioned to capture the opportunities emerging across the region.

10. Strategic Implications for Business and Investment

Positioning for the Emerging Mediterranean System

The evolving dynamics of the Mediterranean region are not simply geopolitical developments; they represent structural economic shifts that will increasingly shape investment flows, trade routes and industrial strategies across Europe's southern neighbourhood.

For companies operating in sectors such as logistics, infrastructure, energy and international trade, the Mediterranean is gradually transforming from a peripheral market into a strategic economic interface linking Europe, Africa and global trade networks.

Understanding this transformation is essential for organisations seeking to position themselves effectively in the coming decade.

Several strategic implications emerge from the analysis presented in this report.

10.1 The Mediterranean as a Strategic Supply Chain Corridor

One of the most significant implications of recent global developments is the increasing relevance of regional supply chains.

As companies reassess long-distance production networks and seek greater resilience, the Mediterranean offers a geographic and economic framework for nearshoring and regional industrial integration.

For manufacturers and logistics providers, this shift may accelerate the development of supply chains linking European industrial markets with production centres in North Africa.

Companies capable of establishing early logistical and industrial partnerships across the Mediterranean may gain significant advantages in terms of production flexibility, transport efficiency and supply chain resilience.

10.2 Infrastructure as a Strategic Asset

Infrastructure will play a decisive role in shaping the future structure of Mediterranean trade.

Ports, logistics hubs, energy interconnections and transport corridors are increasingly becoming strategic assets that influence the direction of trade flows and industrial investment.

Companies involved in infrastructure development, logistics networks and maritime transport may find substantial opportunities in projects linked to:

- port expansion and logistics platforms
- cross-border transport corridors
- renewable energy transmission systems
- hydrogen and electricity interconnections.

In an environment characterised by geoeconomic competition, access to strategic infrastructure may become a key factor in determining long-term competitive advantage.

10.3 Energy Transformation and Industrial Competitiveness

The Mediterranean energy system is likely to play a critical role in Europe's long-term energy transition.

Renewable energy development in North Africa, combined with emerging hydrogen initiatives and electricity interconnections, could reshape energy flows between the northern and southern shores of the Mediterranean.

For European energy companies, infrastructure developers and industrial sectors with high energy demand, these developments may create opportunities for:

- investment in renewable energy generation
- participation in emerging hydrogen supply chains
- development of cross-border energy infrastructure.

At the same time, the regulatory environment within the European Union will continue to shape the competitiveness of European industry and the pace at which energy infrastructure projects can be implemented.

Companies operating in energy-intensive sectors will therefore need to monitor both **market developments and regulatory evolution** when planning long-term investment strategies.

10.4 Navigating Regulatory and Geopolitical Complexity

The Mediterranean region is characterised by a complex intersection of regulatory frameworks, national policies and geopolitical dynamics.

Companies seeking to expand across the region must therefore integrate multiple dimensions of analysis into their strategic planning.

These include:

- geopolitical risk assessment
- regulatory and policy analysis
- long-term infrastructure and energy trends
- regional trade dynamics.

Organisations that rely solely on short-term market indicators may struggle to navigate the evolving complexity of the Mediterranean environment.

By contrast, companies that incorporate **geo-economic intelligence into strategic decision-making** will be better equipped to anticipate changes in investment conditions, trade routes and regional partnerships.

10.5 Strategic Positioning in a Transforming Region

The Mediterranean is entering a period of structural transformation.

Driven by supply chain restructuring, energy transition and geopolitical competition, the region is increasingly becoming a central economic space connecting Europe, Africa and global markets.

For European companies, the key strategic question is no longer whether the Mediterranean will gain importance, but **how quickly and through which economic channels this transformation will unfold**.

Businesses that recognise this shift early – and position themselves accordingly – may gain access to emerging trade corridors, energy systems and regional markets that will shape the economic landscape of the coming decade.

11. The Strategic Chain: Energy, Logistics and Geoeconomic Intelligence

One of the most important conclusions emerging from this analysis is that modern economic systems cannot be understood through isolated sectors.

Trade, energy, infrastructure and geopolitics form a **single strategic chain** in which each element depends on the others.

At the foundation of this system lies a simple but often overlooked reality: **without reliable and affordable energy, there is no functioning transport system.**

Maritime shipping, aviation, rail transport and road logistics all depend on stable energy supply and competitive fuel costs. Energy disruptions, price volatility or regulatory constraints can therefore have immediate consequences across global supply chains.

In practical terms, this means that **energy policy is also logistics policy**, and logistics is ultimately a question of economic strategy.

11.1 Energy as the Foundation of Trade and Transport

Global trade depends fundamentally on energy availability.

Approximately **90 percent of global trade moves by sea**, meaning that maritime transport remains the backbone of international commerce. The functioning of this system depends on the availability of marine fuels, energy infrastructure and stable supply routes.

Energy costs also directly affect freight prices, industrial production and the competitiveness of export-oriented economies.

For regions such as the Mediterranean – where shipping lanes, energy infrastructure and industrial production intersect – energy security is therefore inseparable from economic strategy.

This reality is particularly relevant for Europe, where energy policy decisions influence not only decarbonisation goals but also the competitiveness of transport systems, logistics networks and industrial sectors.

11.2 Logistics as the Operational Layer of Economic Power

If energy forms the foundation of trade, logistics represents its operational layer.

Ports, shipping routes, rail corridors, pipelines and digital supply chains together create the infrastructure through which economic activity flows.

Countries and companies that control or influence these logistical systems gain structural advantages in global trade.

The Mediterranean illustrates this dynamic particularly clearly. Strategic chokepoints such as the **Strait of Gibraltar and the Suez Canal**, combined with major logistics hubs such as

Algeciras, Valencia, Barcelona and Tanger Med, form part of a highly interconnected transport system linking three continents.

As supply chains evolve and regional trade expands, control over logistics networks will increasingly influence economic competitiveness and geopolitical influence.

11.3 Geopolitics as the Context Shaping the System

Energy and logistics do not operate in a political vacuum.

Infrastructure projects, trade corridors and energy partnerships are shaped by national policies, international regulations and geopolitical competition.

Regulatory frameworks – particularly those emerging from major economic blocs such as the European Union – influence the speed at which infrastructure projects can be implemented and the competitiveness of industries operating within those regulatory environments.

At the same time, geopolitical developments affect the stability of trade routes, the availability of energy resources and the direction of global investment flows.

Understanding this broader context is therefore essential for companies operating in sectors that depend on transport, energy and international trade.

11.4 The Growing Importance of Strategic Analysis

As the Mediterranean becomes a more complex geoeconomic system, companies and investors face an increasingly challenging strategic environment.

Decisions regarding infrastructure investment, supply chain design, energy sourcing and regional partnerships now require the integration of multiple layers of analysis:

- geopolitical developments
- regulatory frameworks
- energy systems
- trade flows
- infrastructure investment patterns.

In this context, traditional market analysis alone is no longer sufficient.

Organisations operating across the Mediterranean region will increasingly need **integrated geoeconomic intelligence capable of connecting political developments with energy systems, logistics networks and trade dynamics**.

Companies able to incorporate this type of strategic insight into their decision-making processes will be better positioned to anticipate risks, identify opportunities and navigate the evolving Mediterranean landscape to **anticipate structural shifts in the regional economic system**.