

Kirkuk-Ceyhan Pipeline.. How Has the War Reshaped the Regional Energy Map?



Amid escalating regional tensions resulting from the U.S.-Israeli war against Iran in late February, the map of energy flows in the Middle East witnessed rapid shifts after the shocks that hit navigation through the Strait of Hormuz, casting a heavy shadow over the security of global energy supplies and oil transit routes.

These developments brought back to the forefront concerns linked to excessive reliance on maritime chokepoints, especially with repeated threats to fully or partially close the Strait of Hormuz, through which nearly one-fifth of the world's energy supplies pass. This has pushed a number of oil-producing countries in the region to reassess their traditional export strategies and search for safer, more stable alternatives, whether through overland routes or cross-border pipeline networks.

In this context, the Kirkuk-Ceyhan pipeline has emerged as one of the most prominent strategic options strongly on the table, as a vital corridor for transporting Iraqi oil to the Mediterranean via Turkish territory, alongside increasing moves between Baghdad and Ankara to reactivate the line and strengthen its role in the regional energy equation, amid a highly complex geopolitical environment and challenges that still cast a shadow over the future of this vital route.. So, can this overland pipeline impose itself as a safe strategic alternative on the new energy map?

Energy Calculations Are Changing

The Kirkuk-Ceyhan pipeline is one of the most important strategic corridors for transporting oil in the Middle East. It links the oil fields in the city of Kirkuk in northern Iraq with the Turkish Mediterranean port of Ceyhan, making it a vital outlet for exporting Iraqi crude to global markets and one of the most prominent overland energy lines that has maintained its geopolitical importance for decades.

The pipeline stretches for about 970 kilometers and officially began operations in 1976. It consists of two main pipes: the first with a diameter of 46 inches and the second 40 inches, with a design capacity ranging from 500,000 to 1.1 million barrels per day, supported by a number of pumping stations equipped with advanced operating systems along its route.

Despite the pipeline's strategic importance, it has over the past years faced a series of challenges that repeatedly led to its disruption, whether due to security attacks targeting energy infrastructure or because of political and technical disputes between Baghdad and Erbil over the management of oil exports, export mechanisms, and oil contracts. This led to its suspension for long periods and directly affected Iraqi oil flows.

However, recent regional developments, foremost among them escalating tensions in the Strait of Hormuz and the accompanying fears over the security of global oil supplies, have returned the Kirkuk-Ceyhan pipeline to the circle of strategic interest as one of the overland alternatives capable of reducing reliance on sensitive maritime routes.

Under the logic of necessity and political and economic pragmatism, both Baghdad and Ankara are moving toward reviving this oil corridor and enhancing the chances of its full return to service by trying to overcome the political, technical, and security obstacles that for years prevented it from being used at full capacity, in line with the new shifts in the regional and international energy map.

A Lifeline for Iraq

Iraq depends almost entirely on the Strait of Hormuz to export its crude oil, with between 85% and 90% of its oil exports passing through the ports of Basra in the south of the country toward the Arabian Gulf and then through the Strait of Hormuz to global markets, making the Iraqi economy heavily tied to the stability of this vital maritime corridor.

With the escalation of regional tensions linked to the recent war, Iraq's oil export system suffered a violent and unprecedented shock that directly affected public

revenues, given that the Iraqi economy depends on oil for nearly 90% of its financial resources. During March 2026, Iraqi oil exports fell to only about 18.6 million barrels, compared with nearly 100 million barrels in the previous February, a drop of more than 80% due to the disruption of shipping operations from the southern ports, according to data from the Iraqi Oil Ministry and the State Organization for Marketing of Oil (SOMO), which caused oil revenues to decline to about \$1.95 billion after having exceeded \$6 billion in previous months.

This severe economic shock pushed Baghdad to urgently reconsider its oil export map and search for strategic alternatives capable of enhancing supply flexibility and reducing dependence on maritime routes threatened by geopolitical tensions.

In this context, the Kirkuk-Ceyhan pipeline has once again emerged as one of the most important strategic options available to Iraq, not only as an alternative route for exporting oil through Turkish territory to the Mediterranean, but also as an economic “lifeline” that could give Baghdad greater room to maneuver in the face of regional fluctuations and logistical disruptions linked to the security of navigation in the Gulf.

Reactivating the pipeline also carries many strategic gains for Iraq, as it provides an alternative outlet to the southern ports, helps diversify export routes, reduces pressure on oil infrastructure in the south, and supports exports from the northern fields while strengthening the integration of the national energy network.

More importantly, this overland route could significantly reduce dependence on traditional transport lines that have become vulnerable to threats and disruptions from time to time, amid a regional environment marked by a high degree of uncertainty and security volatility.

Strengthening Ankara’s Vision as a Regional Energy Hub

At the Turkish level, the Kirkuk-Ceyhan pipeline represents one of Turkey’s important geopolitical and strategic assets, as it is not merely a route for transporting Iraqi oil, but a key part of the Turkish vision aimed at turning the country into a regional and international energy hub linking the Middle East and Europe.

The pipeline gives Ankara a pivotal position in global energy trade by strengthening the role of the port of Ceyhan as a main gateway for the flow of Iraqi oil to European and international markets. This enhances Turkey’s presence in regional and international energy equations and gives it broader room to influence supply security and cross-border energy issues.

Economically, operating the pipeline provides Turkey with a range of direct gains, including transit, storage, and logistics service revenues, in addition to stimulating port activity and infrastructure linked to the energy sector, as well as attracting additional investments in transport, energy, and supporting services. This is also positively reflected in the local economy of the southern areas near Ceyhan by boosting commercial activity and creating economic opportunities linked to supply chains and energy.

In the same context, the presence of this strategic corridor on Turkish territory gives Ankara greater flexibility in securing its oil and gas needs and reducing its relative dependence on traditional maritime routes exposed to geopolitical tensions, especially amid repeated disruptions in the Strait of Hormuz.

In addition, Turkey can use the Kirkuk-Ceyhan pipeline as a lever of geopolitical influence in its regional and international relations, giving it a more influential role in regional energy security equations and enhancing its ability to act as a major player in energy balances, in a way that approaches — in terms of strategic impact — the importance the Strait of Hormuz represents for Iran in the global energy equation.

Moreover, restarting the pipeline could represent a strategic opportunity to reshape economic and political relations between Turkey and Iraq, as well as with the Kurdistan Region, amid intertwined interests linked to energy, trade, and border security files. The sustainable operation of this corridor could create a state of mutual economic dependence among the three parties, enhancing the chances of political de-escalation and pushing toward building more stable understandings regarding the management of energy resources, export mechanisms, and logistical cooperation.

The growing economic interests resulting from the pipeline could also help open new paths for security coordination and border control, especially in areas facing complex security challenges, in addition to supporting cross-border trade and investment flows, thereby entrenching the logic of economic partnership as an entry point for enhancing regional stability.

Challenges and Obstacles

Despite the growing strategic and logistical importance of the Kirkuk-Ceyhan pipeline in the regional energy equation, restarting it in the hoped-for manner still runs up against a set of complex political, security, and technical challenges, making the restoration of its full role a highly sensitive process that is not easy to implement.

Foremost among these challenges are the chronic disputes between the Baghdad government and the Kurdistan Region over oil management, export

mechanisms, and revenue sharing, a file that for many years has been one of the most prominent obstacles to the stable operation of the pipeline and has left it vulnerable to stoppages from time to time.

This political divergence has also produced legal complications related to the legitimacy of exports, oil contracts, and mechanisms for dealing with foreign companies, which could in the future reopen the door to renewed disputes and tensions, whether between Baghdad and Erbil or even with Turkey, in the absence of a clear legal and political framework regulating the interests of all parties.

In addition, the pipeline faces ongoing security challenges, having over the past years been subjected to attacks and sabotage operations targeting its infrastructure amid a turbulent regional environment and security complications in some of the areas it passes through. This has often imposed high costs for rehabilitation, maintenance, and restoring operational capacity.

In sum, there is broad agreement on the strategic importance of the Kirkuk-Ceyhan pipeline as one of the most important overland alternatives for securing Iraqi oil exports, in addition to being a key pillar in Turkey's ambition to become a regional energy hub linking the Middle East with European and international markets.

However, the success of this project remains contingent on the ability of Baghdad, Erbil, and Ankara to overcome their political and legal disputes, neutralize security threats, and address technical challenges, ultimately building long-term understandings that ensure the stability of this vital corridor within a highly complex and sensitive regional environment.