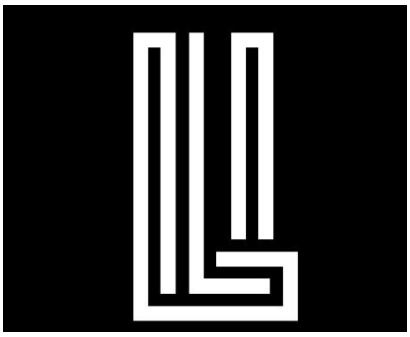


Expert insights and strategy for navigating the Eastern Mediterranean

Conflict and Port Connectivity in the Arab Levant

Analysis of the impact of the Gaza and Lebanon wars on Aqaba, Beirut and Tripoli

Introduction

Across the Arab Levant, maritime and overland trade networks have operated under recurrent pressure since the Beirut port explosion of August 2020 and Lebanon's prolonged economic crisis. From October 2023, the Gaza war and the subsequent escalation of the Israel-Hezbollah conflict in Lebanon created a new phase of regional disruption, affecting maritime and overland trade through changes in shipping routes, border access, carrier behaviour, cargo volumes and port performance. By 2025–2026, however, indicators of maritime connectivity, cargo activity and cross-border trade point to a partial and uneven recovery, alongside renewed interest in infrastructure, logistics and regional connectivity.

Against this background, the report examines three major ports serving the Arab Levant hinterland — Aqaba, Beirut and Tripoli — using available commercial, economic and logistics data. It focuses particularly on how the Gaza war and the subsequent conflict in Lebanon altered their relative roles and performance, while placing these changes within the longer context of disruption since 2020. It also maps the trade and transport connections linking the three ports to the wider Levantine hinterland.

For the purposes of this report, the term 'Arab Levant hinterland' refers to a wider commercial space extending across Lebanon, Syria, Jordan, Palestine and Iraq, and linking Mediterranean and Gulf markets.

The report does not treat the three ports as isolated cases. Rather, it examines their current and potential roles as strategic commercial entry points into this broader hinterland. The hinterland is connected to European, Mediterranean and Gulf trade networks through overland and maritime corridors. Therefore, the importance of the ports of Beirut, Tripoli and Aqaba does not stem simply from their individual cargo throughputs, but from their roles as strategic gateways and maritime entry points into the Arab Levant. Their strategic relevance rises or falls with changes in regional geopolitics, cross-border connectivity and commercial integration.



Key findings

- As of 2026, all three ports remain operational and included within the Levantine and Mediterranean trade systems, but all three require major financial and infrastructural investments to develop in a manner that matches the demands.
- Aqaba was impacted the least by the conflicts and is already producing better results than before. Its strategic location enables it to develop new and existing commercial relations with Syria, Iraq, and the ports of the Mediterranean.
- The Port of Beirut has been, and continues to be, suffering from the Lebanese financial crisis and the aftermath of the Beirut explosion on 4 August 2020. The war in Lebanon has amplified the decrease and subsequent stagnation in the port's performance as it fell rapidly in rankings. However, some 2025 data suggest resurgences in activity.
- The setback in Tripoli was smaller than that of Beirut, and the results the port produces show that it handled the crisis better than the capital, yet it failed to become the number one port in Lebanon. Tripoli's importance may increase or decline depending on the competition from the ports of Syria.

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Analysis

The available data point to a differentiated rather than uniform impact across the three ports. Changes in performance and connectivity cannot always be attributed directly to the Gaza and Lebanon wars, as pre-existing structural problems and domestic economic conditions also played an important role. Nevertheless, the conflicts clearly contributed to increased pressure on regional trade and port activity. At the same time, the available evidence suggests that these effects were neither uniform nor permanent. By 2025–2026, the picture is mixed: while some indicators remain below pre-2020–21 levels, others have recovered or surpassed previous levels, pointing to adaptation and a partial recovery in economic and commercial activity across the Arab Levant.

Geostrategic profiles of the three ports

The Port of Aqaba is the only port in Jordan located at the southernmost tip of the country, on the short Red Sea coastline. Its primary competitor is the Port of Eilat just over the border with Israel. The strategic location of the Port of Aqaba means that in the event of a Houthi attack at the Bab al-Mandeb, which closes access to the Red Sea, the port's connections to the Mediterranean remain secured through the Suez Canal. It is often the first point of entry for goods arriving to the Levant from the Gulf or the Red Sea.

The Port of Beirut was for many years the busiest port on the Mediterranean coast of the Levantine hinterland. Its activity had already come under pressure amid Lebanon's financial crisis before the 2020 explosion caused further disruption. The regional conflicts have since complicated its recovery.

The Port of Tripoli similarly suffered from the disastrous situation in Lebanon. With the fall of the Assad regime, it could expect renewed rivalry from the Syrian ports of Latakia and Tartous. Despite the extent of the damages resulting from the wars being smaller, Tripoli failed to overtake Beirut and become the number one port in the country.

The two Lebanese ports link the hinterland with Turkey, Cyprus, and Europe. The Aqaba-Beirut route connects the cities of Amman and Damascus and the areas of Jordan, southern Syria, and southern Lebanon with a port. Tripoli provides northern Lebanon and northwestern Syria with incoming goods from Europe.

Commercial activity and port performance

In terms of dry cargo and total goods, both the number of imports and exports generally decreased in 2023 in comparison to the previous year, as the wars impacted the countries. For instance, the imported goods arriving at the Port of Beirut that dropped in value by at least 10% in 2023 all produced an increase by 2025, with transport equipment growing by 66%. However, the figures

already indicate an increase in 2024, with the numbers of Jordan already surpassing those from 2022. Specific to dry cargo and total goods loaded, Jordan's numbers increased from 6,141 and 6,532 thousand metric tonnes in 2022 to 7,398 and 7,590 thousand metric tonnes in 2024. In comparison, the same figures for the entirety of Lebanon went from 1,516 and 1,550 in 2022 to 1,430 and 1,538 thousand metric tonnes in 2024, respectively, reflecting the lingering effects of the conflicts. (Sources: UNCTAD, Observatory of Economic Complexity)

The most significant increase is seen in the annual container throughput measured in twenty-foot equivalent units. The ACT data for Lebanon represents a 75.5% growth rate from 434,218 twenty-foot equivalent units (TEU) in 2022 to 762,062 TEU in 2024, showing that despite the unfavourable situation in some parts of the Eastern Mediterranean, commercial activities still flourish. (Source: UNCTAD)

The trade relationships of Lebanon and Jordan also illustrate the wider commercial networks linked to the three ports. When looking at export destinations and import origins in terms of the value of goods and services exported and imported, the global powerhouses of the United States, China, and India continue to be the most dominant partners. In addition, however, actors, such as Turkey, Italy and Greece, have emerged throughout the past five years. Some of the Arab partners, including Egypt and Saudi Arabia, remain, while Jordan's logistical connections with Israel and Palestine create additional opportunities for Aqaba as a regional transit hub. With the Levant bordering both the Red Sea and the Mediterranean, the region is able to connect the markets of the Mediterranean with those of Saudi Arabia, Egypt and the Gulf. The three ports can also function as points of arrival for Western aid shipments into Palestine. (Source: Observatory of Economic Complexity)

The Liner Shipping Connectivity Index (LSCI), which measures the connectivity of individual ports within global liner shipping networks, points out that by March 2026, connectivity had recovered substantially across all three ports, with Aqaba and Tripoli surpassing their September 2023 levels and Beirut nearly matching its September 2023 figure. The figures of Aqaba, Beirut, and Tripoli went from 152.80, 215.87, and 89.39 in September 2023 to 130.10, 178.52, and 67.44 in September 2024, and finally to 173.18, 215.01, and 91.82 in March 2026, respectively. A possible explanation for the initial phase is that carriers reacted to the Gaza war's expansion into Lebanon slowly and may have even increased capacity for Lebanon as an alternative market to Israel during the earlier months of the conflict, after which new risk assessments diverted traffic away from Lebanon. (Source: UNCTAD)

The Container Port Performance Index (CPPI) relates to how ports perform in handling vessel calls. It assesses the time ships spend in port and connects that to the number of containers moved during that time. The changes in the index are consistent with the effects of the different disruptions and political crises the Arab Levant has faced throughout 2023-2025: Beirut fell from 58 to -2.7 from 2023 to 2025, with Tripoli also dropping from 29 to 12.2. The two conflicts, coupled with the disadvantageous situation in Lebanon, created inefficiencies in the ports' performance, from which

they have not fully recovered according to the data. Aqaba was affected less by what has been happening in Lebanon and Gaza but experienced a sharp drop in 2023, going from 79 in 2021 to 54 in 2023. The port was affected less directly by the conflicts in Gaza and Lebanon, but its performance still weakened between 2021 and 2023. This decline is consistent with wider regional shipping disruptions, including the onset of Red Sea Houthi insecurities, though it cannot be explained by that factor alone. (Source: World Bank Group)

LSCI	Mar. 2023	Sep. 2023	Mar. 2024	Sep. 2024	Mar. 2025	Mar. 2026
Aqaba	150.37	152.80	111.86	130.10	186.44	173.18
Beirut	204.57	215.87	248.61	178.52	178.35	215.01
Tripoli	98.99	89.39	103.06	67.44	74.49	91.82

CPPI (global rank)	2021	2023	2025
Aqaba	79 (35)	54 (70)	77.1 (41)
Tripoli	39 (87)	29 (102)	12.2 (134)
Beirut	-106 (357)	58 (68)	-2.7 (226)

Freight import value (billion USD)	2021	2022	2023	2024
Jordan	1.938	2.461	2.317	2.755
Lebanon	0.971	1.366	1.267	1.212

Freight export value (billion USD)	2021	2022	2023	2024
Jordan	0.063	0.056	0.057	0.108
Lebanon	0.031	0.052	0.056	0.036

Regional connectivity of the Arab Levant hinterland

Although direct land corridors linking Iraq with Saudi Arabia and Syria are developing, security, infrastructure and operational constraints have historically limited their use, leaving Jordan as an important alternative transit corridor. Via the Port of Aqaba, this corridor is linked to regional maritime networks in the Red Sea and beyond. Through regional shipping and transshipment networks, Aqaba is also connected to ports in the Gulf and Oman. These ports include Fujairah and Dibba in the UAE, Sohar, Masqat, Sur-Qalhat, and Salalah in Oman. Other ports of the Red Sea, such as Jeddah, King Abdullah Port, and Port Sudan, are also connected to Aqaba.

Due to the higher risks of transiting from the ports of Beirut and Tripoli during the Lebanon War, Aqaba gained importance as a stable port for Levantine and Iraqi-bound cargo. The Aqaba-Amman-Baghdad corridor remains one of the most stable and predictable trade routes that connects the Red Sea with Iraq. The use of the Port of Aqaba increased as a staging point for cargo headed to Saudi Arabia and the Gulf via land routes, as well as for cargo from European and Mediterranean markets destined for Palestine, parts of Israel and Lebanon. This growing regional role was accompanied by broader increases in Jordan's maritime trade and freight services. Dry cargo and total goods loaded by Jordan increased from 5,199 and 5,430 thousand metric tonnes in 2020 to 7,398 and 7,590 thousand

metric tonnes in 2024, respectively. Similarly, import and export freight services grew from USD 1.55 billion and USD 0.04 billion in 2020 to USD 2.76 billion and USD 0.11 billion in 2024, respectively. Total trade between Saudi Arabia and Jordan also increased from USD 4.07 billion in 2018 to USD 5.28 billion in 2024, a possible indicator of Aqaba's increasing relevance. The role of Aqaba as a gateway into Syria is still limited and constrained due to both the political environment and simply because of the better alternatives on the Mediterranean coast. (Sources: UNCTAD, International Trade Centre, Arab News)

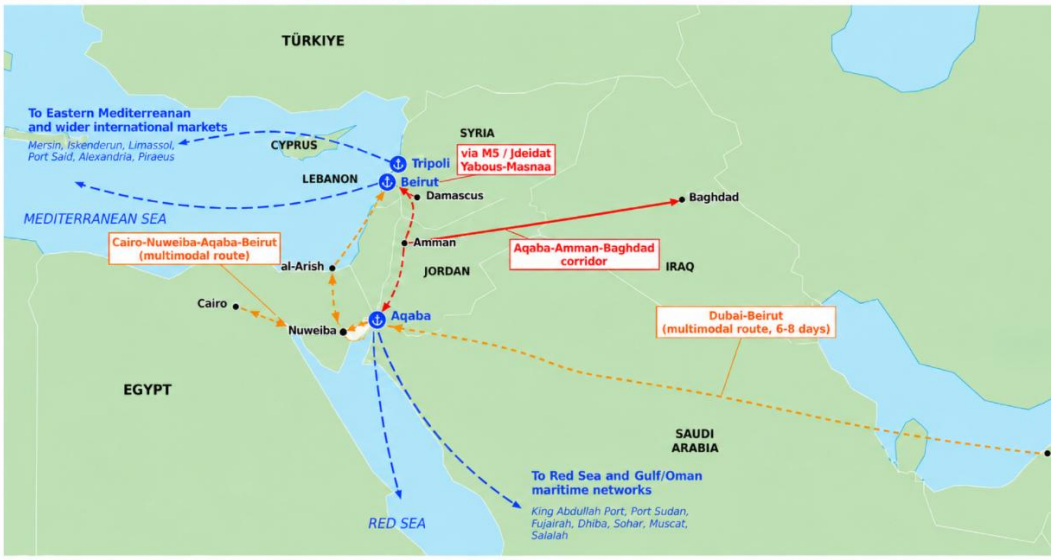
In addition to the maritime connection via the Suez Canal, overland routes from Aqaba to Beirut and Tripoli pass through Syria. From southern Syria, the M5 provides access to Damascus and onwards to Lebanon through the Jdeidat Yabous–Masnaa crossing. Routes farther north through Syria remain more exposed to political and security uncertainty.

The ports of Lebanon are important transport hubs linking the southern Levant with Turkey, Cyprus and European ports. Frequent routes from Beirut and Tripoli connect with Mersin, Iskenderun, Limassol, Port Said, Alexandria and Piraeus, with Tripoli functioning largely as an alternative to Beirut. However, following the fall of the Assad regime in December 2024, evolving conditions in northern Syria and the potential improvement in Syria–Turkey relations could strengthen land routes through northern Syria and increase competition from the ports of Tartous and Latakia for regional traffic.

An existing multimodal route linking Aqaba and Beirut starts in Dubai, crosses Saudi Arabia by road, and continues by ferry from Aqaba to Nuweiba in Egypt. Cargo then moves overland to al-Arish, from where it is shipped by sea to Beirut. The indicative lead time from Dubai to Beirut is around 6-8 days. Another route runs from Cairo to Nuweiba, continues by ferry to Aqaba, and then proceeds overland through Jordan and Syria to Beirut.

Maritime and overland connections of Aqaba, Beirut and Tripoli

Linking the Arab Levant hinterland to regional and global markets



Note: Routes are schematic and based on connections mentioned in the report. They do not indicate exact geographic alignments or relative traffic volumes.
Source: Own illustration based on multiple insights from the report.

Industry Response

After October 2023, several major logistics and transportation companies, the likes of Maersk, Mediterranean Shipping Company (MSC), CMA CGM, and Hapag-Lloyd, have issued security advisories for Lebanese ports. These announcements advised suspending or reducing direct calls, introducing additional charges, or shifting to safer hubs, such as Piraeus, Mersin, Port Said, or Limassol. Aqaba was also affected, partly due to these conflicts and partly due to the Houthi attacks, as companies began using the safer route around the Cape of Good Hope as an alternative to the Red Sea. These developments temporarily made regional feeder services a more attractive option.

What these adaptations tell us is that carrier companies assess risk at the level of the port and the maritime corridor, not simply the country or the region, as they have reduced direct calls to high-risk ports. However, the fact that indirect access via safer hubs continued is a sign that the aim of the industry is not to stop serving local markets affected by wars but to keep the cargo moving by other means. Continuity of service enjoys priority over continuity of routes. Another observation is that safety considerations override concerns related to costs and fuel efficiency in the short term. When carriers instruct their vessels going to the Gulf from the Mediterranean to take the route around the Cape of Good Hope instead of transiting through the Red Sea, and thereby also bypassing Aqaba, they opt for alternatives that cost more fuel and expenses. Overall, carriers sacrifice efficiency for predictability and insurability in the short run when sensing geopolitical risks to their routes.

Business implications

Throughout the conflicts, maritime traffic along the coast of the Eastern Mediterranean has largely remained operational. Direct physical risk has been concentrated in inland and border areas, namely the Beqaa, South and Nabatiyeh Governorates, the border zones of Lebanon and certain neighbourhoods of Beirut. In contrast, Syria's still-fragile political and economic transition continues to generate uncertainty for both the connectivity of overland trade corridors and competition among Eastern Mediterranean ports, despite signs of economic recovery and improving external connectivity. Localized unrest and security tensions have persisted over the past year. Jordan has remained one of the more stable countries in the Levant, with no major domestic security incidents affecting commercial flows. The main risk that could threaten shipping to Aqaba relates to the potential closure of the Bab al-Mandeb due to the actions of the Houthis; however, access to Aqaba via the Suez Canal and Mediterranean ports provides an alternative maritime routing option.

These dynamics influence the risk and cost assessment of regional overland corridors. Transiting through Lebanon and the Lebanon-Syria border can result in exposure to security incidents, access restrictions, and elevated insurance and transport costs. By contrast, border crossings on the Jordan-Syria and Jordan-Iraq frontiers have remained predominantly functional, though still subject to wider regional conditions.

Performance metrics further differentiate between port options. Tripoli's improvements in the Container Port Performance Index (CPPI), alongside Beirut's weaker ranking, indicate that Tripoli is becoming a more viable alternative for traffic serving northern and parts of central Lebanon.

More broadly, commercial route selection in the Levant tends to be driven by the share of transit time spent in high-risk areas, expected waiting times and administrative obstacles at border crossings, and relative port performance and reliability. For market participants the assessment implies the need to track the operational status and environment of key crossings on the Jordan-Syria and Jordan-Iraq routes, changes in the conditions of risk and access along the Lebanon-Syria border, and comparative port performance and congestion at the major ports of the Levant.

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Conclusion

The report indicates that the recovery and adjustment phase following the Lebanon and Gaza wars has forged the Levant into a key pillar of regional trade and connectivity, often acting as a gateway between the markets of the Mediterranean, the Gulf, and the rest of the Arabian Peninsula. The period of crisis has forced the region to reposition itself and adapt its trade and connectivity patterns. The major entry points of the 2010s on the Lebanese coast remain important, but other ports have appeared exploiting different opportunities, including Aqaba's relations with the Mediterranean and a possible re-emergence of Syrian ports. The Levant as a region has shown an increasing potential in its ability to transport, re-export, and accumulate goods from different markets. However, international assessments consistently suggest that this potential still requires much development. The post-blast reconstruction plans for the Port of Beirut following the 2020 explosion raise attention to how modernisation and digitalisation could boost efficiency, how Tripoli's free zone and container terminal are underutilised, and how the logistics and industrial zones around the Aqaba Special Economic Zone operate below planned capacity. The Arab Levant hinterland's strategic position helps it connect the markets of the Mediterranean, the Gulf, and the inland areas of the Arabian Peninsula; many of its apparent business and investment possibilities remain unexploited.

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About Levant Insights Consulting

Levant Insights Consulting is an independent geopolitical and business advisory based in Stockholm, specializing in political risk analysis and regional dynamics across the Eastern Mediterranean. We provide strategic intelligence to help companies and organizations navigate complex political, economic, and security environments, anticipate regional and market shifts, and make informed strategic decisions. Our analysis draws on deep regional expertise, data-driven insights, and rigorous monitoring of ongoing developments.

We specialize in:

Political Risk Analysis — assessing political and security developments, policy shifts, sanctions, and other sources of uncertainty that may affect businesses and organizations.

Governance & Business Environment Analysis — examining how institutions, regulatory systems, economic conditions, and governance structures shape the environment in which businesses and organizations operate.

Regional Connectivity & Infrastructure — examining ports, trade routes, logistics networks, and the political and economic forces affecting regional connectivity.

Scenario Analysis — exploring plausible future developments and assessing their potential implications for businesses, organizations, and strategic decisions.

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Gellért Miklóssy contributed research and analysis to this report.