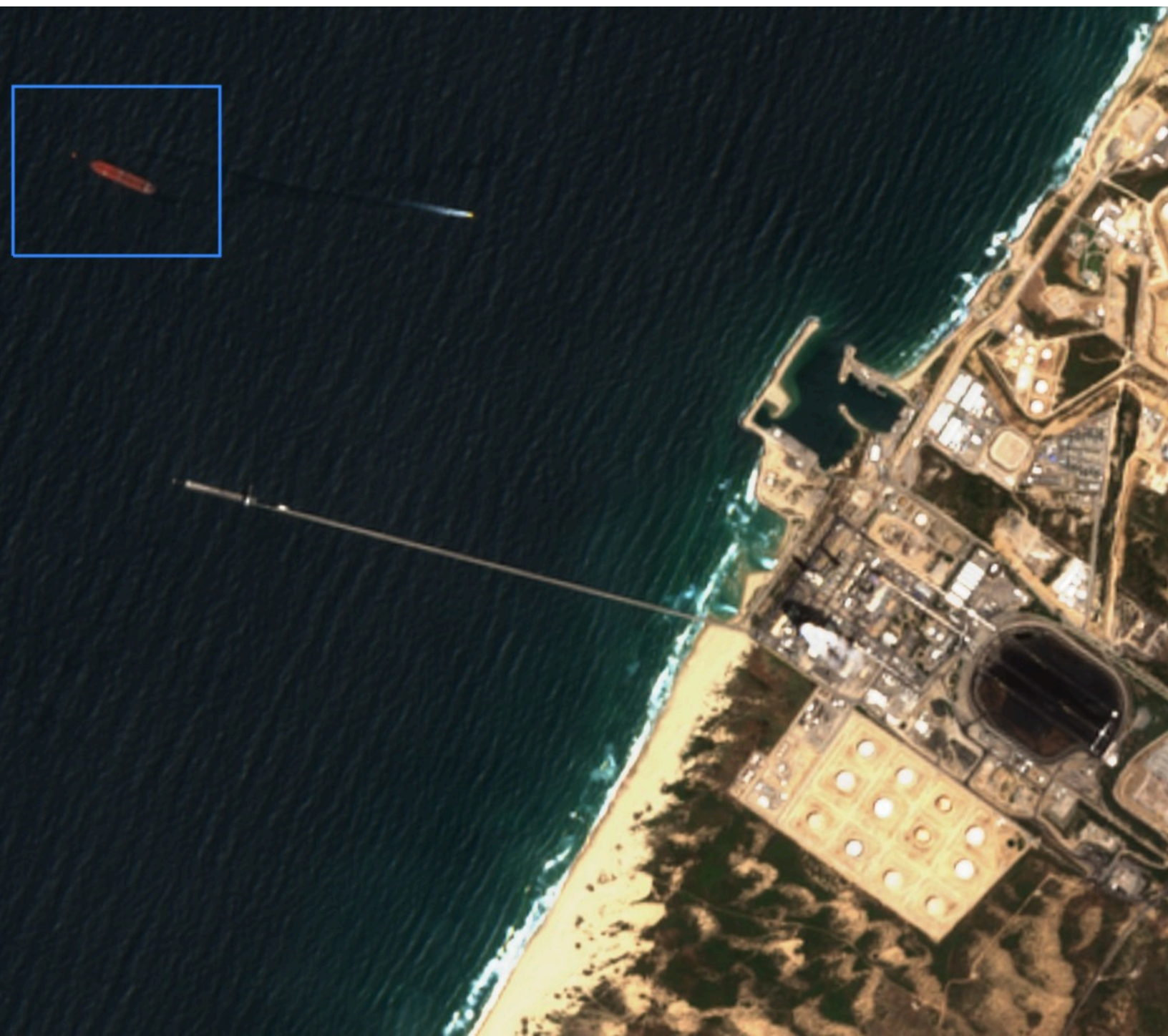


**Data Analysis**

# **Behind the Barrel:** New Insights into the Countries and Companies Behind Israel's Fuel Supply



## Background

In February 2024, Oil Change International (OCI) commissioned Data Desk to provide an [overview of the supply](#) chains bringing crude oil and refined petroleum products to Israel, focusing on fuel supplies to the country's armed forces. This research [was released](#) in March 2024.

In light of the ongoing Israeli invasion of Gaza and rulings by the International Court of Justice (ICJ) that Israel's actions may have violated the terms of the Genocide Convention and be unlawful, OCI commissioned Data Desk to provide an update of the Israeli fuel imports data covering the period March to July 2024.

This new analysis also incorporates [additional](#) research on United States military jet fuel supplies published by the Netherlands-based Center for Research on Multinational Corporations (SOMO) in May 2024. This briefing, therefore, covers fuel shipments to Israel arriving during the nine months from October 21, 2023, to July 12, 2024.

Some countries have already taken action over fuel shipments due to the Gaza crisis. In June 2024, [Colombia](#) set a strong precedent and issued an [embargo](#) on coal exports to Israel until the ICJ ruling is upheld. Until the stoppage, over 50% of Israel's coal imports had come from Colombia. It remains to be seen if other countries will follow suit.

## Key Findings

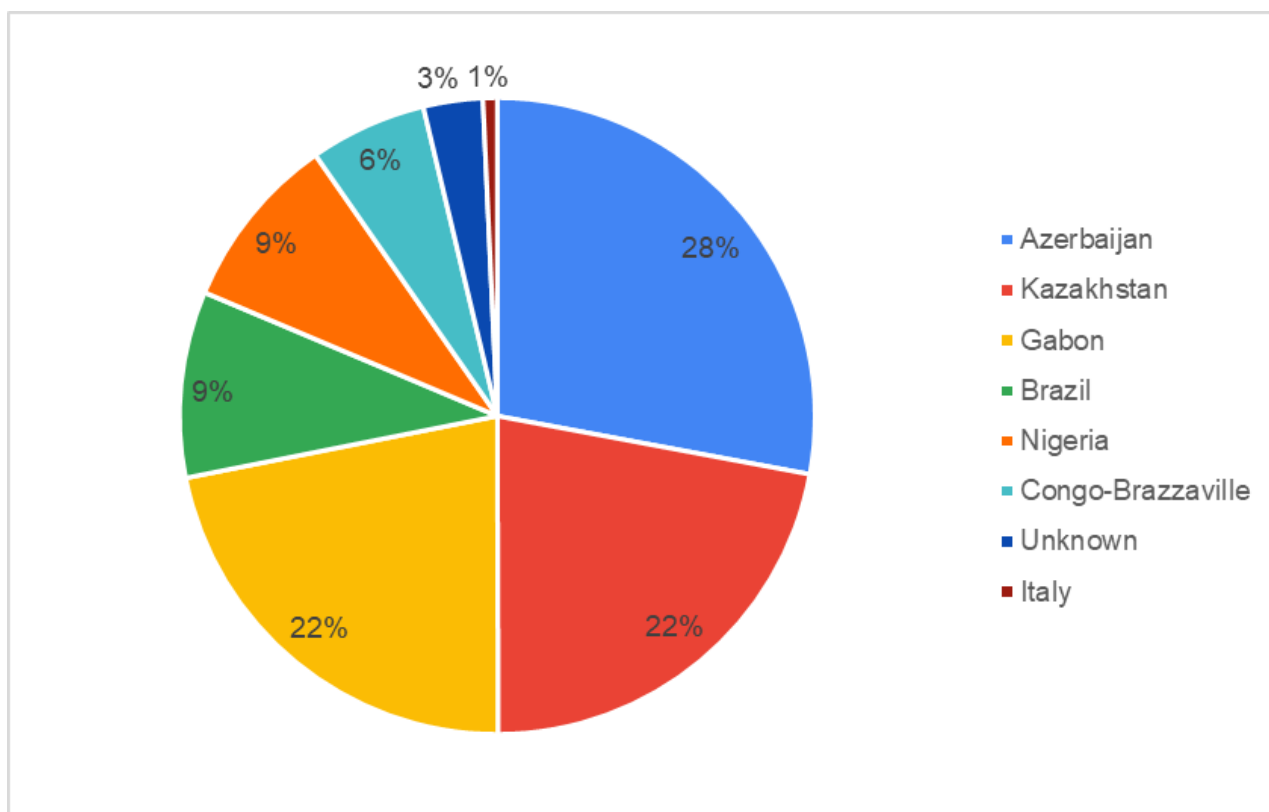
- We tracked a total of 65 shipments of crude oil and refined petroleum products that have been delivered to Israel from October 21, 2023 to July 12, 2024. 35 of these, or 54%, departed their origin port after the January 26, 2024 International Court of Justice (ICJ) [ruling](#) that the Palestinian people have plausible rights under the Genocide convention.
- **Corporate 'Responsibility':** Investor-owned and private oil companies are complicit in facilitating supplies of crude oil to Israel through their operations and ownership. These companies collectively supply 66% of oil to Israel. The major international oil companies, including **BP**, **Chevron**, **Eni**, **ExxonMobil**, **Shell**, and **TotalEnergies**, may be linked to **35%** of the crude oil supplied to Israel since October. These companies, as well as state-owned entities and other private and publicly traded oil producers, profit from supplying oil to Israel's refineries, where a proportion is likely refined into fuels for Israel's war machine.
- **US Military Aid:** The **United States** continues to be a key supplier of JP8 Jet Fuel, primarily used for military jets and other refined fuels.
- **Azerbaijan and Kazakhstan:** These countries remain the two leading suppliers, providing half of all crude oil to Israel in this period. **Azerbaijan** supplied 28%, with **Kazakhstan** supplying 22%. All Azeri crude is delivered via the Baku-Tbilisi-Ceyhan

(BTC) pipeline, majority owned and operated by **BP**. This crude oil is loaded onto tankers at the port of Ceyhan in **Turkey** for delivery to Israel.

- **Central and West African Suppliers:** African countries supplied 37%, with 22% coming from **Gabon**. **Nigeria** and **Congo-Brazzaville** supplied 9% and 6% respectively.
- **Brazil:** Brazilian crude oil has made up 9% of the supply since the war started. Brazil also sent a tanker of fuel oil to Israel that arrived in April. As a significant oil supplier to Israel, Brazilian President Lula, who has been highly [critical](#) of Israel's actions, has the opportunity to help bring about a ceasefire by pursuing an oil embargo.

- **Mediterranean and European Connections: Italy, Greece, and Albania** have joined the list of countries supplying Israel with fuel. Despite being a major oil importer, **Italy** sent a tanker of its crude oil and one of naphtha. **Greece** shipped diesel to Israel in June, while **Cyprus** provided transshipment services to tankers supplying crude oil from Gabon, Nigeria, and Kazakhstan.
- **Russian Refined Products:** Israel has received seven shipments of Russian refined products since December 2023. These were mostly vacuum gas oil (VGO) used to increase gasoline and diesel yields at refineries.

**Figure 1: Crude Oil Supply to Israel by Country (October 2023 - July 2024)**



Source: [Data Desk](#)

## Country and Corporate Involvement

### Crude Oil

We tracked 46 crude oil shipments from October 21, 2023, to July 12, 2024. 20 of these, or 44%, left their port of origin after the ICJ ruling. The total volume of crude oil was 4.1 million tons, of which 1.9 million tons, or 46%, left after the ICJ ruling.

As mentioned above, seven countries are known to have supplied Israel with crude oil since the war started. Azerbaijan and Kazakhstan supplied 50%. There are two shipments totaling 125,000 tons, or 3%, that are listed as unknown origin. One of these was loaded in Egypt and could be crude oil delivered by the SUMED pipeline, which traverses Egypt, bringing oil from Saudi Arabia, UAE, and Egypt.

## Linking Companies to Israel's Crude Oil Supply

International oil companies (IOCs) own significant stakes in oil production in many countries supplying oil to Israel. For example, in Azerbaijan and Kazakhstan, where 50% of the crude oil supply is derived, IOCs are leading partners in both the oil production and the pipelines delivering oil to ports from which the oil is shipped.

In the following analysis, we use two data sets to attribute to individual companies the crude oil imported into Israel since the war began, focusing on the six major IOCs. Firstly, the [shipping data](#) commissioned by Oil Change International and compiled by Data Desk provides the oil's origin country and crude oil grade. Second, the [Rystad Energy](#) database provides data on the company ownership of oil production in the oil fields and countries identified in the shipping data.

**Table 1: Company Share of Oil Delivered to Israel Based on 2024 Share of Production in Each Country or Oil Field (kilotons)**

Country	BP	Chevron	Eni	Exxon	Shell	TotalEnergies
Azerbaijan (ACG-SD)	345	0	0	58	0	0
Brazil	0	0	0	0	43	16
Congo-Brazzaville	0	27	37	0	0	42
Gabon	0	0	0	0	0	54
Italy (Val D'Agri)	0	0	18	0	12	0
Kazakhstan (Kash-Tengiz-Kara)	0	254	100	163	100	45
Nigeria	0	30	7	33	33	30
<b>TOTAL</b>	<b>345</b>	<b>311</b>	<b>162</b>	<b>254</b>	<b>188</b>	<b>186</b>

Source: Oil Change International based on Data Desk and Rystad Energy



Where we were able to identify specific oil fields linked to the crude oil grades listed in the shipping data, which was the case with Azeri, Kazakh, and Italian crude oil, we used the company share of production at those oil fields. Elsewhere, for Brazil, Congo-Brazzaville, Gabon, and Nigeria, we used the company share of total oil production in those countries. We therefore divided the company share of production from each country (or the specific oil fields identified in certain countries) by the amount of oil imported by Israel from those sources. This results in the following breakdown for the six major IOCs.

## Azerbaijan

Azerbaijan is the largest supplier with 28% of the total crude oil shipped in the period. Azeri oil is shipped via the Baku-Tbilisi-Ceyhan (BTC) Pipeline, operated and 30% owned by BP. [According to](#) BP, the BTC pipeline is predominately supplied by the Azeri-Chirag-Guneshli Deepwater oil fields in addition to condensate (which is blended with crude oil) from the Shah Deniz field. The ownership of the oil and condensate produced in these fields is shown in the table. We therefore attribute 30% of the Azeri oil imported by Israel to BP and 5% to Exxon.

**Table 2: Company Ownership of Oil Production in the ACG and Shah Deniz Fields in Azerbaijan 2024**

Company	Share
BP	30%
Socar (Azerbaijan)	30%
TPAO (Turkey)	9%
MOL	8%
Inpex	7%
ExxonMobil	5%
Lukoil	4%
ITOCHU	3%
NIOC (Iran)	2%
ONGC	2%

Source: Rystad Energy Ucube (July 2024)

## Kazakhstan

Kazakhstan is the source of 22% of the oil imported by Israel. Kazakh oil is supplied via the [Caspian Pipeline](#) (CPC), a joint venture partly [owned](#) by Chevron, Eni, Shell, Exxon, and others. The CPC carries Kazakh and Russian crude, but the shipments to Israel are all listed as originating from Kazakhstan. The Kazakh oil delivered by the CPC pipeline is predominantly supplied from the Tengiz, Kashaghan, and Karachaganak fields in and on the shore of the Caspian Sea. The ownership of this production is shown in Table 3. We therefore attribute the Kazakh oil imported by Israel to these companies according to these shares.

**Table 3: Company Ownership of Oil Production in the Kazakh Oil Fields that Supply the CPC Pipeline 2024**

<b>Company</b>	<b>Share</b>
Chevron	28%
ExxonMobil	18%
KazMunaiGaz	17%
Shell	11%
Eni	11%
TotalEnergies	5%
Lukoil	5%
CNPC	3%
Inpex	2%

Source: Rystad Energy Ucube (July 2024)

### Italy

One 30 kiloton shipment of Italian crude was imported by Israel representing 1% of the total. This was listed as the Val D’Agri crude oil grade which comes from the [Val D’Agri oil project](#) located onshore south of Naples. The project is a joint venture between Eni (61%) and Shell (39%).

### Other Countries

The other 46% of the crude oil supply came from Gabon, Nigeria, Brazil, Congo-Brazzaville, while the origin of 3% is not certain. An analysis of the company ownership of the total oil production in these known countries completed our analysis leading to the figures shown in Table 1 and further analysis of other companies discussed below.

### Corporate “Responsibility”

The major IOCs may have collectively supplied 35% of Israel’s crude oil in this period. Other investor-owned and private oil companies are responsible for another 30%, while state-owned companies likely produced 34%. This is shown in the chart below, together with the breakdown of IOCs. Chevron and BP share the top place, each with 8% of the supply. This is a result of their leading ownership of Kazakh and Azeri oil production, respectively.

According to [Dr. Irene Pietropaoli](#), Senior Fellow in Business and Human Rights at the British Institute of International and Comparative Law, *“Corporations and their managers, directors, and other leaders could be held directly liable for the commission of acts of genocide, as well as war crimes and crimes against humanity. Article VI of the Genocide Convention specifies that ‘persons’ may be held liable for genocidal acts – which include individual businessmen or corporate managers as natural persons and may include corporations as legal persons.”*

Dr. Pietropaoli also told us in an emailed statement that *“Independently from home State regulation, companies that sell oil and fuel and other military supply to the government of Israel have their own responsibility to respect human rights and abide by international humanitarian law and international criminal law, as recognized in the UN Guiding Principles on Business and Human Rights ‘over and above compliance*

with national laws and regulations'. Corporations supplying jet fuel and oil to Israel may be providing material support to the military, aware of its foreseeable harmful effects, and therefore risk complicity in war crimes, genocide, and other crimes under international law."

### Jet Fuel and Other Refined Petroleum Products

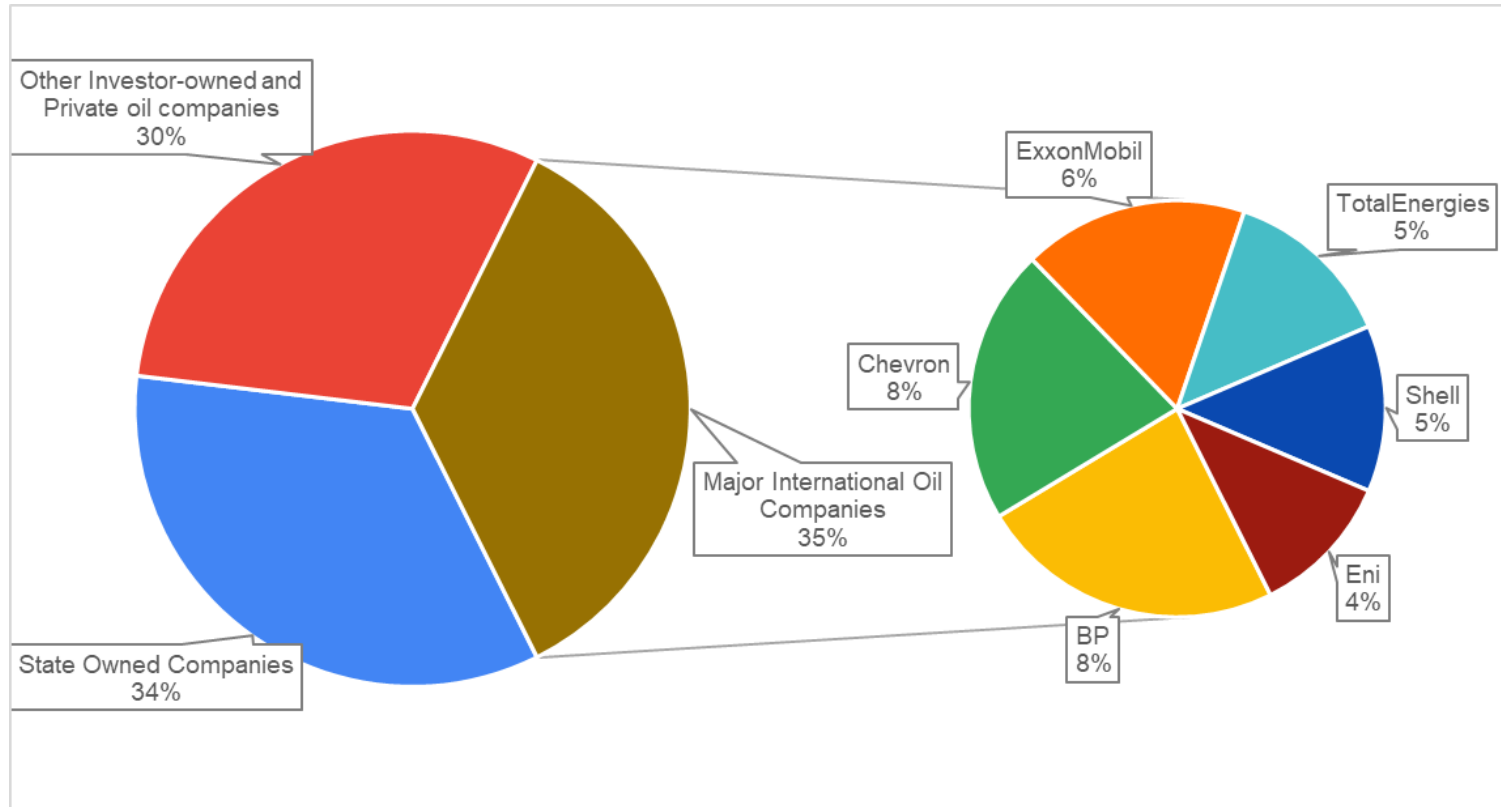
We tracked 19 shipments of refined petroleum products delivered to Israel from October 21, 2023, to July 6, 2024. 15 of these, or 79%, left their port of origin after

the ICJ ruling. The total volume shipped was 687,000 tons, 79% of which shipped after the ICJ ruling.

The largest shipper was the United States which shipped nearly 250,000 tons of products in this period. Much of this was JP-8 jet fuel primarily used in military jets. Another shipment that was not recorded in our data delivered to Israel while this report was being drafted (see below).

The US supplied 36% of the refined products, while Russia delivered another 28%. The non-US shipments were a mixture of fuel oil,

**Figure 2: Estimated Corporate Ownership of Crude Oil Supplied to Israel October 2023-July 2024**



Source: Oil Change International - Using data from [Data Desk](#) and Rystad Energy Ucube

gasoil and diesel, vacuum gasoil, and Naphtha. Other countries sending refined products include Brazil, Albania, Greece, and Italy.

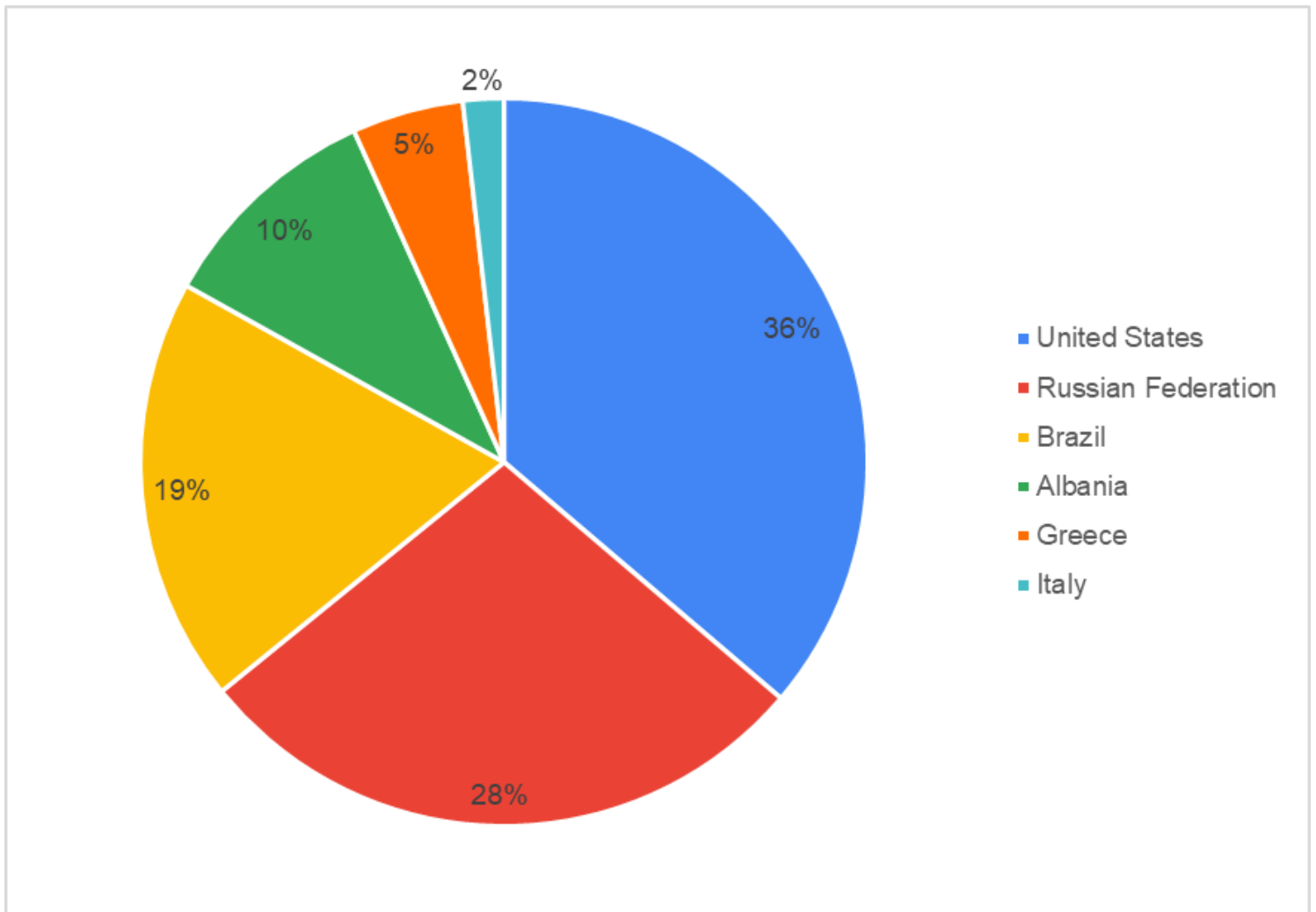
### US Military Aid

Israel has received three tankers of JP-8 Jet Fuel (specifically formulated for military jets) from the U.S. since the war started. One tanker left the U.S. before the war started, while two have been sent since. All originated

from **Valero's** Bill Greehey refinery in Corpus Christi, Texas.

In early August 2024, the US-registered *Overseas Santorini*, one of [the key tankers](#) involved in supplying US Jet Fuel, docked in Israel, with what is believed to be another [shipment of JP-8](#). The tanker's insurers, **UK Mutual Steam Ship Assurance Association**, and **Lloyds Slip via Wills, Towers Watson**, are [UK-based](#). The US has also supplied two shipments of unspecified

**Figure 3: Country Share of Petroleum Product Shipments to Israel - October 2023 - July 2024**



Source: [Data Desk](#)



refined products and one shipment of diesel and gasoil, which also came from Corpus Christi.

## The Mediterranean

The role of Israel's Mediterranean neighbors is increasingly coming under scrutiny. In June, a delivery of naphtha arrived in Israel from Italy. The following month, July, a small shipment of crude oil from **Italy** also arrived in the country. **Greece** has also shipped one tanker of diesel/gasoil.

**Turkey, Cyprus, and Greece** are also central to providing trans-shipment services to Israel. The port of Ceyhan in Turkey is the terminus of the BTC pipeline and is listed as the loading country for 26% of the shipments by volume. Cyprus is listed as the loading country for 21%, while Greece loaded 5%. So, these three countries are responsible for handling over 50% of the crude oil and refined products volumes over the nine-month period.

Finally, the Data Desk analysis shows that of the thirty-seven tankers identified as shipping products to Israel, 41% flew the **Maltese** flag and 22% the **Greek** flag.

Dr Pietropaoli's [published legal opinion](#) on the Obligations of Third States and Corporations to Prevent and Punish Genocide in Gaza outlines the responsibility of states and raises the question of whether these states' role in Israel's fuel supply contravenes these obligations. Dr. Pietropaoli told us in an emailed statement:

"The obligation of States to comply with the ICJ interim Order flow directly from Article I of the Genocide Convention, which requires States to undertake 'to prevent and to punish genocide'. The ICJ Order finding 'a real and imminent risk that irreparable prejudice will be caused to the rights found by the Court to be plausible' means that States are now aware of the risk of genocide being committed in Gaza. States must consider that their military or other assistance to Israel's military operations in Gaza may put them at a risk of being complicit in genocide under the Genocide Convention.

Information on data sources and the full supply chain analysis conducted by Data Desk is available [here](#).

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Oil Change International is a research, communications, and advocacy organization focused on exposing the true costs of fossil fuels and facilitating the ongoing transition towards clean energy.

Data compiled by Data Desk, commissioned by Oil Change International.

Cover Photo: The crude oil tanker Lipari (IMO 9529487) moored at the EAPC terminal in Ashkelon, Israel on 19 April 2024 following a journey from the Ima field offshore Nigeria. Satellite image: ESA Sentinel-2

For more information, contact the team at Oil Change International at [fuel-research@priceofoil.org](mailto:fuel-research@priceofoil.org).