

Facts in Brief: Russia, Ukraine, Europe, Oil & Gas – 4 March 2014

Overview:

There has been no physical disruption in supplies of crude oil or natural gas transiting Ukraine to Europe. While the IEA Secretariat is constantly monitoring oil and gas markets, remains in communication with member countries and stands ready to respond in the event of a major supply disruption, the current situation to date does not call for an IEA response.

Gas Facts:

Ukraine is the largest transport corridor of Russian gas to Europe. As can be seen in the table below, physical Russian gas flows to Europe through Ukraine account for slightly less than half of the total estimated 167 bcm of gas imports from Russia to Europe.

Russian gas is delivered to Europe through different routes:

- flows via Ukraine, supplying Slovakia, the Czech Republic, Hungary, and feeding into Western Europe, as well as to South East Europe and Turkey,
- directly to Germany via Nord Stream,
- to the Baltic States, Poland and Germany via Belarus,
- directly to Finland,
- and directly into Turkey via the Blue Stream pipeline.

TABLE: Gas flows to Europe
unit: billion cubic meters

	2010	2011	2012	2013*
Imports from Russia to Europe	144.5	156.6	148.0	167.2
<i>Transit through Ukraine</i>	<i>93.9</i>	<i>99.1</i>	<i>78.9</i>	<i>82.3</i>
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Total European imports from sources other than Russia:				
- imports from North Africa	71.6	56.5	60.4	48.5
- imports from Iran, Azerbaijan	12.3	12.0	11.6	13.0
- LNG imports	86.7	86.2	63.7	45.8
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OECD Europe				
- demand	560.4	511.1	502.2	503.2
- production	293.6	272.4	274.9	270.3

* All import data refer to OECD Europe and non-OECD Europe together. In contrast, demand and production refers to OECD Europe only, as 2013 estimates for non-OECD Europe are not yet available.

For more complete information on European gas flows, please click [here](#).

Oil Facts:

Ukraine is a transit country for Russian crude exports to Central European countries. The southern leg of the Druzhba pipeline, Russia’s main artery for supplying crude oil to central Europe, runs through Northern Ukraine and has capacity of 400 kb/d but has been used at roughly three-quarters capacity for the past several years. It is the largest source of crude oil supply for Slovakia, Hungary and the Czech Republic. The Black Sea ports of Odessa and Feodosiya have in the past been important seaborne outlets for Russian crude and refined products, but export volumes steeply declined in 2013.

The southern Druzhba spur carried approximately 310 kb/d of crude in 2013, in line with volumes carried over 2009-12. The Czech Republic, Slovakia, Hungary and Bosnia, are highly dependent upon the Druzhba for crude imports.

Imports of crude via the Southern Druzhba in 2013

	kb/d
Slovakia	115
Hungary	101
Czech Republic	78
Bosnia	16
Total	310

In 2013, Slovakia imported 100% of its crude via the Druzhba, Hungary 94% and the Czech Republic 65%.

Ukrainian ports shipped an average of 30 kb/d of Russian crude oil in 2013, down steeply from an average 190 kb/d over 2009-2012. In 2013, Russia exported 60 kb/d of refined products via Ukrainian ports. Fuel oil accounted for 50 kb/d with gasoil making up the rest. These volumes were significantly lower than the 130 kb/d exported over 2009-12.