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ASCII

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Exposure of Austrian Oil Supplies and Potential Consequences in Three Crisis Scenarios

POLICY BRIEF

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Executive Summary

We review the current state of dependencies associated with the oil imports into Austria. Geopolitical tensions have dramatically increased the price of oil, making substitution more difficult and expensive. In three disruption scenarios for Austria's oil imports, we estimate the availability of oil over time. The three most important findings are:

1. **94% of Austria's oil flows from the trans-alpine pipeline from Trieste**, briefly halted in March by suspected sabotage of a power pylon feeding a pumping station.
2. **Around 52% of Austria's oil is imported from Kazakhstan**, reaching Trieste via the CPC pipeline to Novorossiysk and then by tanker. Recent Ukrainian strikes hit the adjacent Russian terminal.
3. **The current strategic oil reserves of Austria are sufficient for 100 days of normal operations**, of which 70% is transportation.

1. Background

Recent disruptions to the trans-alpine pipeline (TAL) and drone strikes on the port of Novorossiysk in Russia have raised concerns about Austria's ability to secure its oil supplies. Currently, there are no recorded shortages, and, to the best of our knowledge, none are immediately expected. In the global context of heightened energy insecurity, driven by the Iran war, the closure of the Strait of Hormuz, and substantial infrastructure damage in the Middle East, Austria's critical dependence on oil imports matters, as the country does not have many options to replace lost supplies. We highlight the most important dependencies.

Every week, around eight tankers' worth of crude oil arrive in the Gulf of Trieste. Crews unload the oil at the marine terminal and feed it into the trans-alpine pipeline (TAL). The Schwechat refinery southeast of Vienna then refines the Austrian share of it. 94% of the oil used in Austria completes this journey, the remaining 6% is produced domestically at the Matzen oil field, northeast of Vienna. Together, this makes the port of Trieste and the TAL pipeline the single most important chokepoint for Austrian energy supply. Figure 1 a shows the route of TAL and its branch towards Schwechat.

FIGURE 1 | **left**: TAL pipeline to Austria. Source: TAL group at tal-oil.com; **right**: CPC Pipeline from Kazakhstan to the Russian port of Novorossiysk. Source: eurasianet.org. From there oil is shipped to the TAL terminal in Trieste with tankers.

The TAL pipeline presents a single point of failure for Austrian supply. This became clear on March 25th, when a power pylon near Udine was damaged by unknown parties, halting the flow of oil. Workers restored the flow within three days, with no reported long-term consequences [1]. Italian police are investigating possible sabotage; TAL itself denies any attack on its facilities.

Around 52% of the oil used in Austria is produced in Kazakhstan, a landlocked country. To reach Trieste, it travels through the Caspian Pipeline Consortium (CPC) pipeline to the Russian port of Novorossiysk on the Black Sea. Figure 1 b shows the route of CPC. The port of Novorossiysk is a major oil export terminal for Russia.

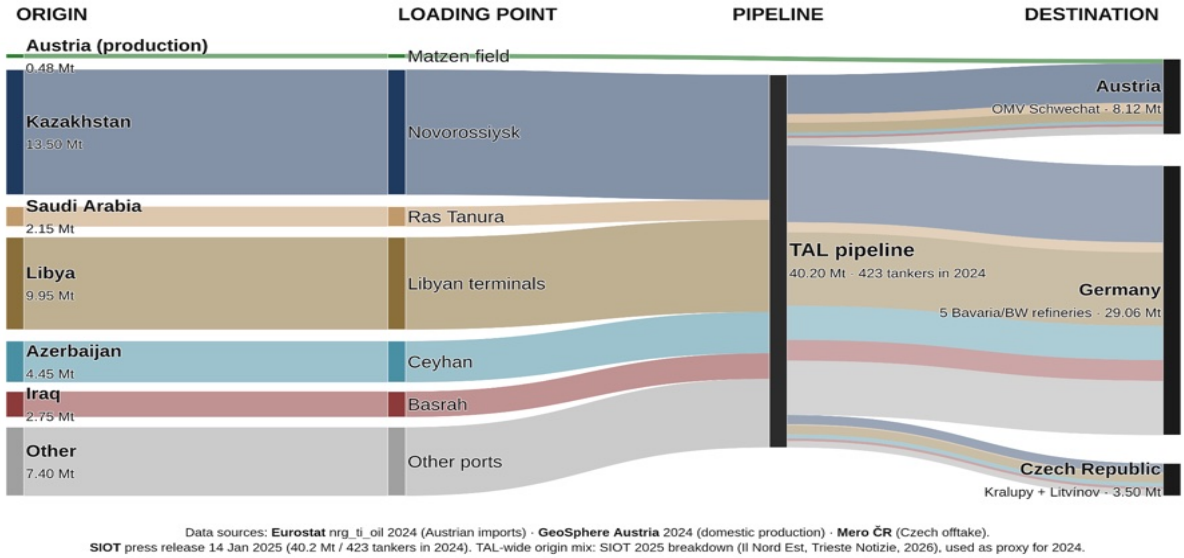


FIGURE 2 | From oil to refinery through the TAL pipeline as in 2024: Flow of oil from the production sites (Kazakhstan 52%, Saudi Arabia 11.5%, Libya 13%, Azerbaijan 4%, Iraq, Austria 6%, and other 13%) to Austria. The flow is seen from the origin through the shipping terminals and finally the TAL pipeline. Also seen is the fraction of oil reaching Germany, Austria, and the Czech Republic.

In Figure 2 we present a Sankey diagram showing the flow of oil from the various production sites (Kazakhstan, Saudi Arabia, Libya, Azerbaijan, Iraq and Austria) through the terminal sites in the respective regions to Trieste (entry site for the TAL pipeline). It is also seen how the oil flowing to TAL is divided between Germany, Austria, and the Czech Republic (colors show the origin of oil).

Given the current rise in oil prices, the Ukrainian army has intensified its attacks on the port of Novorossiysk, presumably to prevent Russia from benefiting from the windfall.

The attacks targeted Russian export facilities, not the facilities linked to the CPC [2,3]. The attack on March 2nd suspended terminal operations for four days but caused no major structural damage. A more recent attack on April 5th caused more extensive damage. Sites of fires caused by this attack are shown in Figure 3. By April 10th, operators had partially resumed operations [4]. As of April 13th, the terminal was still operating well below capacity. Based on the available information, none of the CPC export facilities were hit [3].

FIGURE 3 | Fires caused by Ukrainian attacks on the Russian oil terminal at the port of Novorossiysk on April 5th. Source: Nasa FIRMS via Bloomberg.

Austria holds strategic oil reserves under the framework of the International Energy Agency (IEA), which requires its member countries to maintain stocks equivalent to at least 90 days of net oil imports. Austria currently sits above that threshold. About 70% of national oil consumption goes to transportation.

On 11 March 2026, in response to disruptions in the Strait of Hormuz, IEA members agreed to release 400 million barrels from their collective reserves, the largest coordinated draw in the agency's history [5]. Austria's contribution is 2.4 million barrels, with the first batch released on 20 April 2026 [5,6].

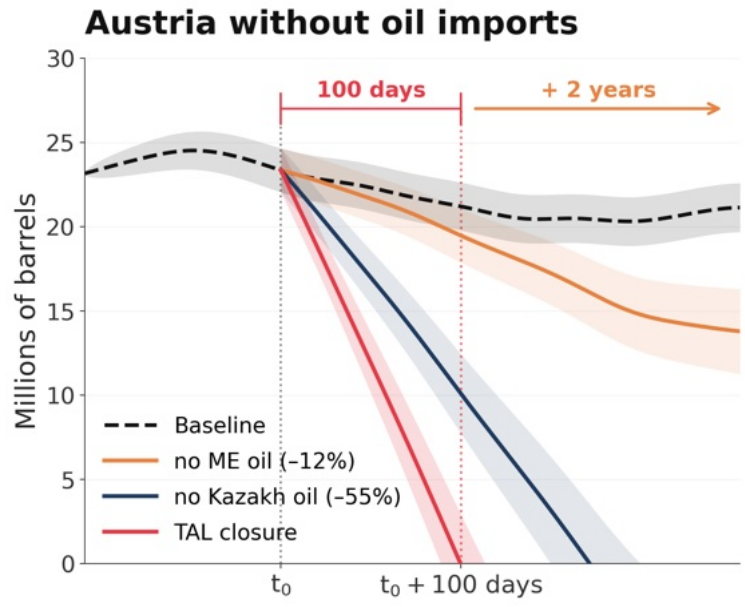
2. Three scenarios: Availability of oil in Austria under a prolonged supply shock

In Figure 4 we present an estimate for the availability of oil in Austria under three different supply shock scenarios. The managed release of the IEA serves as the baseline scenario (current situation).

The **first scenario** is a permanent cessation of Middle Eastern oil imports, which account for 12% of Austria's import supply. This scenario is pessimistic, as routes such as the Yanbu terminal on the Red Sea coast would likely continue to supply some volume outside the Strait of Hormuz. Under this scenario, stocks decline gradually and would be exhausted in just over two years assuming unchanged consumption.

The **second scenario** is a loss of Kazakh oil, which accounts for 55% of imports and reaches Trieste via the CPC pipeline and the Russian port of Novorossiysk. Under this scenario, reserves would be exhausted within approximately six months.

The **third**, and most severe scenario, is a full closure of the TAL pipeline, through which practically all of Austria's crude imports arrive. Under this scenario, strategic reserves would deplete within less than four months at normal consumption levels.



Sources: Eurostat nrg_stk_oilm, nrg_cb_oilm. Conversion: 7.4 kbbl/kt.

FIGURE 4 | How long will Austria's oil reserves last under the three discussed scenarios. The supply shock occurs at time t0. The black dashed line shows reserves under current conditions, including the ongoing IEA-coordinated release of strategic reserves, assumed to last for six months. The orange line shows what happens if oil from the Middle East (12% of imports) would stop arriving: reserves drain slowly over roughly two years. The dark blue line shows a full loss of Kazakh oil (55% of imports) that flows through the CPC pipeline to the Russian port of Novorossiysk and onward by tanker to Trieste: reserves would be exhausted in approximately six months. The red line shows the worst-case scenario, a complete closure of the TAL pipeline that accounts for practically all Austrian crude inflows: reserves run out within 100 days assuming normal consumption without demand destruction. Shaded areas show the range of uncertainty due to seasonal swings in demand.

All scenarios assume no demand-side response. Stock levels are projected from the latest Eurostat monthly data using 13 years of seasonal patterns in both reserves (nrg_stk_oilm) and consumption (nrg_cb_oilm). Uncertainty bands are derived from an autoregressive model fitted to historical demand variability.

3. This means

Austria's oil supply chain is concentrated on one single pipeline, one single port, and one single dominant supplier whose exports transit the most conflict-exposed routes today. While the strategic reserve currently provides a sufficient buffer and no immediate acute threats to supply, a sustained disruption at one of these chokepoints would deplete reserves within months under normal consumption.

This highlights the necessity for a more diversified energy supply infrastructure and increased efforts to reduce energy dependence in the coming years.

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Policy Briefs present socially relevant statements that can be derived from our research results.

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