

Austrian Energy Fuels Industry

2025/26

KEY FACTS AT A GLANCE



KEY FACTS

AUSTRIAN ENERGY FUELS INDUSTRY ASSOCIATION (AEFIA)

		2025	2024	2023	2022	2021
Member companies, sold production, employees						
Number of association companies		28	27	26	26	26
Sold production	€ mn	8.02	9.68	10.45	10.88	8.53
Total employees		4,452	4,524	4,335	4,221	4,180
Of which blue-collar		917	923	887	833	789
Of which white-collar		3,475	3,554	3,405	3,337	3,328
Of which apprentices		60	47	43	51	63
Production, import, transport						
Domestic oil production (incl. NGL)	tons mn	0.47	0.48	0.48	0.53	0.57
Domestic natural gas production	m³n bn	0.49	0.54	0.55	0.61	0.65
Crude oil import	tons mn	8.28	7.67	7.51	5.13	7.64
Natural gas import¹	m³n bn	5.31	5.06	6.75	11.43	4.51
Oil transport²	tons mn	8.29	7.64	7.55	5.28	7.74
Oil refining	tons mn	8.6	8.1	8.0	5.8	8.3
Consumption, products						
Domestic oil consumption³	tons mn	9.27	9.52	9.68	9.73	9.97
Petroleum imports – products³	tons mn	5.28	5.69	5.81	6.99	6.06
Petroleum exports – products³	tons mn	3.38	2.82	2.83	2.17	3.43
Domestic gas consumption (end consumers)	m³n bn	7.01	6.44	6.53	7.50	8.51
Natural gas storage filling level as at 31 December		64.4%	78.5%	92.9%	86.9%	33.7%
Filling stations, vehicles						
Number of filling stations⁴		2,694	2,724	2,751	2,759	2,748
Of which major branded		1,283	1,305	1,310	1,316	1,322
Approved vehicles	1,000s	7,512	7,425	7,340	7,269	7,215
Of which cars and station wagons	1,000s	5,286	5,232	5,185	5,151	5,134

¹ Physical imports minus physical exports (import-export balance)

² Adria-Vienna pipeline

³ Without petrochemicals or in part without sole biofuels

⁴ Excluding 273 agricultural diesel outlets

CHANGES IN ENERGY SUPPLY



Hedwig Doloszeski, Managing Director

During the year under review, the Austrian energy fuels industry was faced with drastic economic and regulatory challenges. The Austrian economy was found to be resilient but was nevertheless affected by international uncertainties, geopolitical crisis situations and volatile energy costs. Similarly, the global oil and economic situation was rather mixed: while the euro zone showed some first signs of recovery, other regions were rather muted in their dynamics.

Global crude production continued to be shaped by OPEC+ policies. Geopolitical risks – chiefly tension in the Middle East and the war in Ukraine – caused substantial market volatility and were found to be key factors in driving up prices, even though the physical supply remained unaffected. Russia, in spite of Western sanctions, maintained its export position via alternative sales markets. OPEC still envisages demand for crude to rise up to 2050, while the International Energy Agency IEA expects global demand to decline as of 2030. For Austria, dependent on imports as it is,

this volatility showed quite clearly in diesel prices: about 55% of diesel consumption is imported as finished products, and the remaining internal production at the Schwechat refinery is based on crude imported from abroad. This double dependency on imports pushed the industry into the centre of an intensive political debate. In view of rising fuel prices, the Austrian federal government issued an ordinance to limit margins. We protested – not out of self-interest but because this type of interference with an internationally intertwined and highly competitive market has always proved to be a bad instrument. The Federal Competition Authority similarly confirmed the risk that such a regulation distorts markets and competition. As a more effective alternative we thus plead for targeted tax reductions, chiefly of the mineral oil tax – which most clearly contributes to the fuel price.

WITH NEW PRIORITIES TOWARDS THE ENERGY FUTURE

Our institutional reorganisation was implemented at the start of the year. The former Austrian Petroleum Industry Association became the **Austrian Energy Fuels Industry Association**, a new name embodying what our members have long since practised – a change from fossil energy carriers to integrated energy services. Our members are diversifying their business models on a global scale: geothermal energy, electric mobility and green hydrogen are among the key technologies for a climate-friendly future. Biofuels and synthetic fuels are another priority, as are geoenery systems, and the production, capture, utilisation and storage of hydrogen and CO₂ (CCUS). The legal basis for the reorientation was adopted by the Economic Parliament of the Austrian Economic Chamber in June 2025 and became effective in January 2026.

The transition towards a climate-neutral energy system compares to a marathon run which calls for perseverance, realistic milestones and a reliable framework. Fossil energy sources are still indispensable; until the transition is completed, it is thus essential to safeguard conventional energy supply while advancing the development of new technologies.

Our focus – today as much as tomorrow – is to ensure guaranteed, affordable and future-oriented energy supply for Austria!

BODIES OF THE ASSOCIATION

The Association Committee is responsible for defining targets and strategies, as well as ensuring decision-making on budgets and audits. The Committee members are elected for a term of five years at the time of the Economic Chamber elections, which ensures continuous and non-biased representation of all interest groups. The most recent election took place in March 2025.

AEFIA ASSOCIATION COMMITTEE

Chairman

Martijn Arjen van Koten
Board Director Fuels & Feedstock
OMV Aktiengesellschaft

Deputies

Rainer Klöpfer
Chairman of the Management Board
Shell Austria GmbH

Armin Springer
Managing director under commercial law
Enilive Marketing Austria GmbH

Members

Ernst Burgschwaiger
Authorised signatory
ONEO GmbH

Massimiliano Del Moro
Managing Director
Enilive Austria GmbH

Robert Dick
Company representative
REP GmbH

Erik Gille
Managing Director
JET Tankstellen Austria GmbH

Oliver Kowald
Managing Director
RED Drilling & Services GmbH

Nina Marczell
Authorised signatory
OMV Downstream GmbH

Melanie Milchram-Pinter
Managing Director bp Austria GmbH

Markus Mitteregger
General Director RAG Austria AG

Henrik Mosser
Managing Director OMV Austria
Exploration & Produktion GmbH

Markus Mühlmann
Managing Director Transalpine Ölleitung
in Österreich Ges.m.b.H.

Michael Niklas
Managing Director
Erdöl-Lagergesellschaft m.b.H.

Christina Reichart
Authorised signatory
OMV Solutions GmbH

Co-opted members

Stefan Hölbfer
Senior Vice President
OMV Downstream GmbH

Martin Hussler
Managing Director
MOL Austria Handels GmbH

Peter Pirkner
Authorised signatory
OMV Aktiengesellschaft

AEFIA OFFICE

Hedwig Doloszeski
Managing Director

Susanne Gfatter
HSSE, SCC

Reinhard Thayer
Environment and energy

Alessandra Fabro
AEFIA secretariat,
statistics and prices

Tanja Vanicek
AEFIA, ÖGEW and SCC
secretariats

WE ENERGISE AUSTRIA

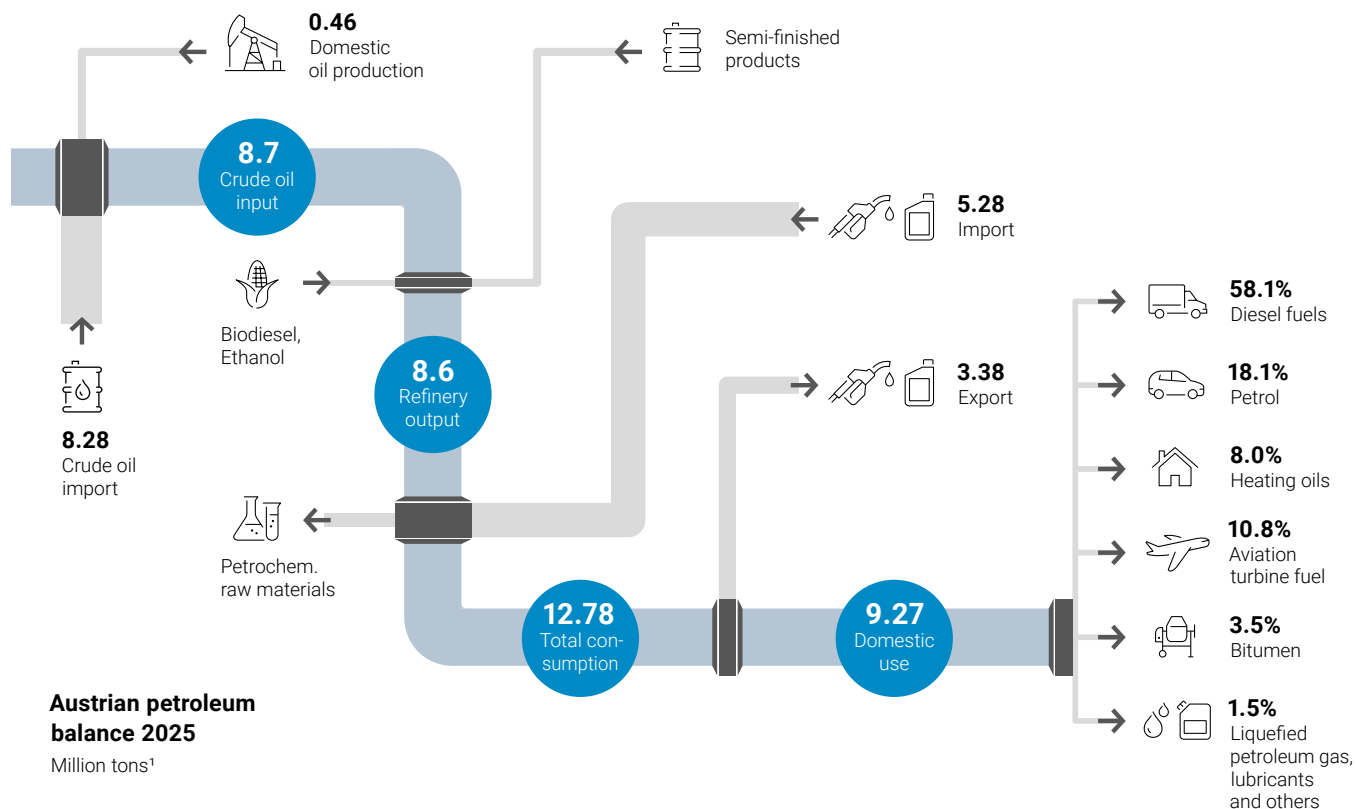
The Austrian petroleum industry stands for individual mobility, contributes substantially to the performance of the Austrian economy and provides attractive jobs and future-proof training opportunities for the young generation. Thanks to the application of new technologies, the petroleum industry actively helps achieve the climate targets.

In 2025, Austria's petroleum industry found itself in a phase that required adapting to changing market and regulatory conditions. Sales revenues declined to € 8.02 billion, a minus of 17.1% compared to the previous year (2024: € 9.68 billion). In spite of high energy prices and a very moderate economic recovery, the industry remained a major employer, given its 11,000 employees including those of petrol station partners.

The petroleum businesses ensure that all of Austria is fully supplied year-round and 24 hours a day, organising full-scale transport and storage logistics to this end. Today's modern petrol stations act as regional service centres that offer a wide range of products and service.

Domestic crude production delivered about 5% of the processing volume handled by the Schwechat refinery. In 2024, domestic production of petroleum products was just below 59%. Furthermore, the Schwechat refinery doubles as a major petrochemical location, and Austrian companies are leaders in Europe-wide E&P.

Supply security continues to be a top priority, especially when considering the ongoing transformation of energy systems. Accordingly, the dense Austria-wide network of fuel depots and storage tanks run by the petroleum industry needs to be gradually adjusted to the declining need for fossil energy carriers and increasing development of renewables.



¹ Simplified chart; rounding errors from delimitation differences, double counts, release of contingency reserves and refinery consumption

AT A GLANCE

Austria's domestic sources of crude oil and natural gas derive mostly from the Vienna Basin and the molasse zone, which, however, deliver just a fraction of actual consumption. About 59% of all petroleum products are made at the Schwechat refinery. The market is shaped by contracting consumption, price variations and high taxation.

EXPLORATION AND DRILLING

Austria's local production of crude oil and natural gas is carried out by OMV Austria E&P, RAG Austria and ADX VIE, mostly in the Vienna Basin, a plain in Lower Austria to the east of Vienna, and the molasse zone (Upper Austria, Salzburg). In 2025 drilling increased by 6.6%, to 18,207 metres, all of which carried out by OMV. Of this, 8,277 metres were drilled for geothermal purposes. The crude taken from the Vienna Basin passes to the Schwechat refinery by pipeline, while that obtained from Upper Austria is transported by tank wagons.

PRODUCTION

Domestic crude production continued to decline in 2025. Total oil production shrank by 2.4%, to 465,019 tons. Of this, about 89% derived from the Vienna Basin and the rest from the molasse zone. OMV Austria E&P contributed about 88%, while RAG Austria added 9% and ADX VIE 3%. NGL production fell to 8,608 tons, a minus of 4.9%. In total, 566 pay wells were operated. Proven crude reserves were 3.75 million tons (sufficient for 8.1 years). Imports rose by 8.0%, to 8.28 million tons, mostly from Kazakhstan (57.5%), Libya (14.6%), Saudi Arabia (12.7%), Guyana (7.0%) and Iraq (3.2%).

Natural gas production shrank by 8.4%, to 491.5 million m³n, of which 63% derived from the Vienna Basin. Most of the volume (some 89%) was produced by OMV Austria E&P, with RAG Austria contributing 11%. Proven natural gas reserves were 5.9 billion m³n (sufficient for 12 years). Natural gas imports rose to 5.31 billion m³n (+4.8%). Domestic consumption increased by 8.8%, to 7.01 billion m³n.

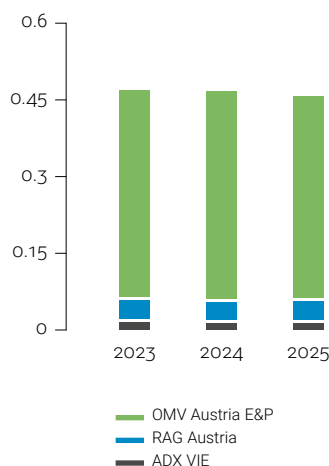
PROCESSING AND COVERAGE

Europe has 94 refineries which provide a total capacity of 658.0 million tons. The Schwechat refinery is the only one in Austria and it can handle 10.2 million tons of crude oil. It is part of the OMV Refinery Association together with Burghausen (Germany) and Petrobrazi (Romania).

In 2025, Schwechat processed about 8.6 million tons of crude (capacity utilisation: 91%), covering about 59% of the domestic consumption of petroleum products. It produced fuels and biogenic components such as biodiesel and ethanol to improve sustainability. About 95% of the crude derived from imports. The semi-finished products are transported from the refinery through 19 pipelines to the Vienna-Lobau depot, where they are mixed to petrol, diesel and extra-light heating oil.

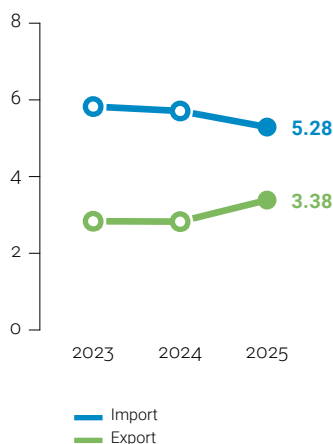
Oil production in Austria

Million tons



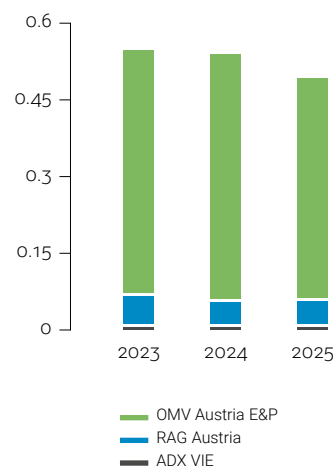
Petroleum products – imports and exports

Million tons



Natural gas production in Austria

Billion m³n



In spite of growing domestic production, Austria continues to be dependent on imports. In 2025, Austria imported 3.71 million tons of diesel, 0.73 million tons of petrol and 0.45 million tons of extra-light heating oil. Altogether, imports of fuels and heating oils dropped to 4.89 million tons (–7.1%), while exports increased by 21.5% to 2.97 million tons.

CONSUMPTION

Domestic consumption of petroleum products shrank in 2025, to 9.27 million tons (–2.6%). At 58.1%, diesel remained the main consumer, followed by petrol (18.1%), aviation turbine fuel (10.8%) and heating oils (8.0%). Fuel sales were about 7.06 billion litres, or 4.0% below the previous year. Petrol consumption rose slightly, by 0.9% to 1.68 million tons, while diesel went down to 5.38 million tons (–5.4%). Heating oils grew by +3.1% to 0.74 million tons. The chief product of this group, extra-light heating oil, increased by 3.4% to 0.72 million tons.

As to natural gas, at 80.6 TWh consumption in Austria was substantially higher compared to the previous year (+8.5% over 74.3 TWh), yet still below the five-year average of 91 TWh. One cause of the higher consumption was a more intense use of gas power plants for electricity generation in 2025.

Petrol stations in Austria

By the end of 2025, a total of 2,694 petrol stations were in business in Austria, 30 fewer than in 2024. Major-branded stations shrank to 1,283, the others to 1,411. Over the last ten years, branded stations declined by about 5%, while the number of independent ones grew. Nevertheless, Austria still has a dense network of petrol stations.

PRICE DEVELOPMENT

Crude prices are determined by supply and demand, greatly influenced by political upheavals, wars, force majeure and financial market movements. According to the Federal Ministry of Innovation, Mobility and Infrastructure, the average import value for crude oil was about € 482 per ton (a minus of 17.0% against 2024: € 581). Brent crude sold at US\$ 69.0 per bbl (–14%) as an annual average, varying between US\$ 63 and US\$ 79, caused by a glut of crude, given that production exceeded demand. At the same time economic growth in the buying countries remained weak, which caused demand to be lower than expected.

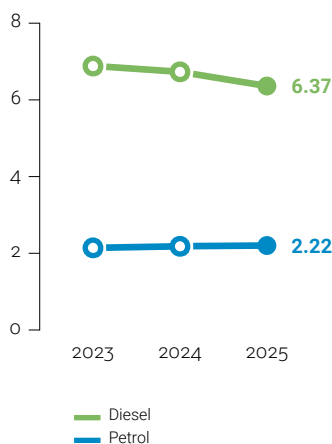
Austrian petrol station prices reflected the development of crude prices. At the start of 2025, Eurosuper was € 1.552 per litre, rising to € 1.597 over the year, and at € 1.461 dropped to its lowest value at the end of the year. Diesel sold at € 1.594 at the start of the year, went up to € 1.630 and was below the price of Eurosuper in mid-year. As an annual average, Eurosuper cost € 1.519, and diesel was sold at € 1.536, so that both fuels were below the EU average of € 1.639 and € 1.553 respectively.

Calculation of fuel prices

Fuels are among the highest-taxed products in Austria: for Eurosuper, 53% are taxes; for diesel the rate is 48% (prices including taxes, July 2026). As of 2022, the price has included the CO₂ tax (€ 55 per ton in 2025). The statutory obligation to admix renewables also increases costs. Production costs comprise the crude price, transport, refinery processing, margins and storage. The remaining costs cover distribution and infrastructure, such as petrol stations, environment facilities, disposal, maintenance, personnel, commissions, marketing, research and development.

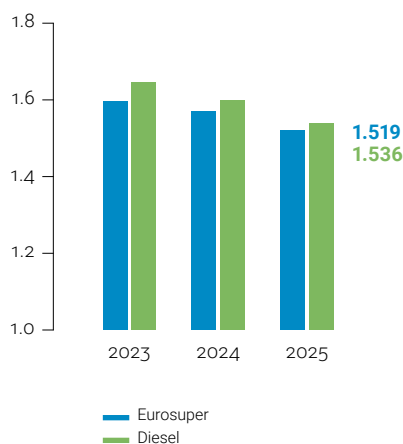
Fuel sales

Billion litres

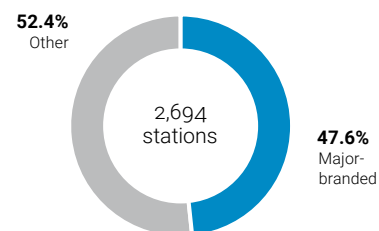


Average annual fuel prices

€ per litre



Petrol stations in Austria 2025



**AUSTRIAN ENERGY
FUELS INDUSTRY ASSOCIATION
(AEFIA)**

Wiedner Hauptstrasse 63
1045 Vienna, Austria

P +43 5 90900 4892
office@energy-fuels.at

www.energy-fuels.at

istockphoto / StevanZZ



www.energy-fuels.at