



Securing European Military Fuels in a Tense Security Environment: Supply, Distribution and Storage Meeting Recap

Background

In light of the ongoing conflict in Ukraine and the broader security challenges posed to Europe and NATO, strengthening deterrence and defence capabilities has become a top priority.

Within this context, convening a dedicated meeting on Europe's fuel infrastructure was both timely and necessary.

On April 24, 2025, the Hague Centre for Strategic Studies (HCSS) in collaboration with the Federation of European Tank Storage Associations (FETSA), hosted a closed-door event focused on the state of fossil fuel supply, distribution, and storage in Europe – and the critical implications for European military readiness and sustainment.

For the first time, representatives from NATO, its fuel storage and distribution entities, the European Union, Allied nations, and industry partners came together for an open and constructive dialogue – sharing concerns, exchanging insights, and exploring avenues for collaboration.

This important engagement comes at a pivotal moment, in the run-up to the NATO Summit in The Hague in June 2025.

Discussions emphasized the importance of strengthening cooperation to build a more sustainable, resilient, and self-reliant military fuel system – one that can serve as a long-term enabler of European security and defence. Below are the most important conclusions that emerged from the discussions.

Key Conclusions, Challenges and Recommendations

1- Armed forces are dependent on civilian fuel supply, storage, and distribution infrastructure in both peace and war time. This will remain the case well into the mid 21st century due to the long service life of military equipment. While alternative fuels, novel technologies, and new modes of warfare will likely mitigate this problem in the coming decades, they will not avert it.

2- In the short to medium term the financial viability of existing civilian fuel infrastructure in Europe is declining due to falling domestic demand for fossil fuels in light of the energy transition. This is reducing Europe's fossil fuel storage and refining capacity, with increasingly strict transition regulations hastening this trend. Closing legacy fuel infrastructure without taking into account military fuel needs poses risks for Europe's military readiness.

3- The existing infrastructure for the storage and distribution of fuels is insufficient for a full-scale conflict scenario, particularly on NATO's European Eastern Flank. The EU and NATO currently have plans to rectify this situation in the medium to long term (10-25 years). It is less clear what kind of measures can be taken to prepare for the possibility of war in the intervening period. Greater cooperation between the EU and NATO is desirable to avoid duplication of efforts.



4- While individual national Ministries of Defence have extensive plans for the usage of fuel and infrastructure in war scenarios, due to strict confidentiality this information is rarely shared in detail with other government bodies within and between Allies, national infrastructure management agencies, or the civilian fuel infrastructure sector. Likewise, the civilian sector possesses information and expertise that would be highly relevant to military planners. Finding a way to improve coordination between governments and across sectors is necessary.

5- The usage of existing national strategic oil stocks during wartime may be problematic for a variety of reasons. For one, the conditions under which supplies may be requisitioned are often unclear or require the declaration of a state of emergency. Further, fuel stockpiles may be held in forms that are difficult for military forces to use. Finally, strategically vital small countries such as the Baltic States currently have militarily negligible levels of fuel stocks due to their small populations.

6- There are persistent questions about the allocation of responsibility for funding, initiation, and implementation in the area of military fuel infrastructure readiness. A clear message from NATO and EU attendees was that while their bodies have powerful tools for the coordination and mobilisation of resources it is ultimately the initiative of member states that is critical. Attendees agreed that raising this issue at the national as well as the multinational level will be necessary to improve the availability of fuel supplies and infrastructure.

7- Attendees from the military realm noted significant gaps in levels of national preparedness for full-scale war between European NATO members, especially between the West and the East. Ministry of Defence officials from several states shared their countries' experiences with improving military fuel readiness. Attendees agreed that a desirable first step to improving Europe-wide coordination and preparedness would be the sharing of information on best practices for whole-of-government approaches to fuel readiness.

8- Many attendees expressed concerns about the current regulatory hurdles to the construction of new fuel infrastructure in Europe. Some viewed planned infrastructure expansion as unrealistic under these conditions. Attendees close to decision-making processes expressed cautious optimism that European governments are gaining an appreciation of the need for regulatory facilitation of vital infrastructure projects. There is currently a "window of opportunity" for actors at multiple levels to coordinate to address these challenges.

9- Ultimately, a decision must be made on how to finance additional fuel storage and infrastructure. For effective coordination between the fuel industry, military, and civilian planners, there must be a financial incentive for the private sector to participate. This could come from either commercial viability or state subsidies. Likewise, NATO Allies on the Eastern Flank are unlikely to afford the full cost of maintaining large frontline fuel stockpiles without support from other member states.

10- The uncoordinated adoption of Sustainable Aviation Fuels (SAF) across Allies was noted as currently posing challenges to European fuel infrastructure readiness. While some European NATO members have certified SAF for usage in their military aircraft others have not, even for the same platforms. There have also been challenges in integrating SAF into existing cross-border distribution infrastructure due to diverging regulatory regimes along NATO Pipeline Systems. Equally, SAF is expensive and not currently stored in emergency fuel stocks. The assumption and hope remain that SAF's usage will become smoother as its business case improves and regulatory alignment increases across NATO members.