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The Crisis of Crude Oil Availability in Slovakia and Its Implications for the Regional Fuel Market

In 2026, liquid fuel tourism in Slovakia became one of the key manifestations of mounting tensions in the regional liquid fuel market, stemming from disruption on the crude oil supply side. Relatively low diesel prices – maintained despite the suspension of crude oil deliveries via the Druzhba pipeline, and the conflict in the Middle East – created strong demand-side incentives for drivers across Central Europe. As a result, this phenomenon exposed the structural vulnerability of Slovakia's fuel sector to external shocks, leading to localised liquid fuel shortages, increased pressure on distribution infrastructure, and the necessity for regulatory intervention by the state.

The Phenomenon of Liquid Fuel Tourism. Liquid fuel tourism is a direct consequence of the suspension, as of 27 January 2026, of Russian crude oil supplies via the Druzhba pipeline to Slovakia and Hungary ("IEŚ Commentaries", no. 1533), as well as the outbreak of war in the Middle East, which led to a sharp increase in global commodity and liquid fuel prices. At present, the Slovak market ranks among the cheapest in the European Union; on 19 March 2026, the price of diesel in Slovakia stood at 6.54 PLN per litre, compared to 7.45 PLN in Czechia, approximately 7.62 PLN in Poland, and as much as 8.36 PLN in Austria[1]. Such substantial price differentials – ranging from approximately 0.90 PLN to 1.80 PLN per litre – generate strong economic incentives for drivers, particularly in the heavy transport segment. Given the standard fuel tank capacity of heavy goods vehicles is typically between 600 and 1,000 litres, this translates into potential savings of around 550–1,800 PLN for a full tank. Under current conditions of low profit margins in the transport sector, these savings constitute a decisive factor in the choice of location for fuel purchasing.

As a result, a marked increase in the inflow of foreign drivers – primarily from Poland and Czechia – has been observed, with drivers deliberately diverting their routes to refuel at lower prices. This phenomenon rapidly evolved from incidental occurrences into a systemic pattern, leading to local liquid fuel shortages, particularly in the northern part of the country, where liquid fuel station infrastructure was not prepared for such intense additional demand. Consequently, a temporary destabilisation of the domestic liquid fuel market occurred. The response from the Slovak authorities was relatively swift. Quantitative restrictions were introduced, including limits on single refuelling transactions and a maximum of 10 litres per liquid fuel canister, as well as a transaction value cap of 400 EUR per vehicle. In addition, a price differentiation mechanism was implemented, applying higher prices to foreign drivers based on average liquid fuel prices in Czechia, Poland, and Austria. Furthermore, a ban on the export of petrol and diesel was introduced.

Problems with Crude Oil Availability. As a result of constraints on the availability of crude oil from the Russian Federation, the refinery in Bratislava was forced to reduce its capacity, which led to a decline in fuel production and a deterioration of the supply balance on both the domestic and regional markets. At the same time, the refinery drew on existing inventories, allowing for short-term maintenance of operational continuity; however, this solution is neither optimal nor sustainable. In parallel, the use of the Adria pipeline was increased (with supplies delivered via the crude oil terminal in Omišalj, Croatia), followed by greater reliance on the Százhalombatta–Šahy pipeline, although this route proved to be subject to significant constraints. In addition to higher logistical costs, the Croatian side continues to block the possibility of supplying Russian crude oil through

[1] The conversions were calculated using the EUR/PLN exchange rate as of 24 March 2026 (data from the National Bank of Poland).

this channel as a result of EU sanctions. Further challenges include uncertainty regarding actual throughput capacity as well as regulatory tensions between the infrastructure operator and the MOL Group, which owns both the Bratislava and Százhalombatta refineries. In this context, cooperation with Czechia is gaining importance. A key possibility – hitherto not implemented – is the reversal of crude oil flows (reverse operation) along a section of the Druzhba pipeline, which would enable crude oil transport from west to east, i.e., from Czechia to Slovakia. In the short-term variant, this solution could provide supplies of approximately 1 million tons per year, corresponding to around 16% of the Slovak refinery's processing capacity. In the medium term, following the necessary infrastructure investment (estimated to take 2–3 years), this volume could increase to 2–3 million tons annually, significantly enhancing supply security. Under such conditions, this route could account for nearly 50% of crude oil supplies to the refinery. The importance of Czechia stems from its advanced diversification of crude oil import sources; following the complete phase-out of Russian supplies in 2025, imports are now fully delivered via the TAL and IKL pipeline systems, which connect Czech refineries with the port of Trieste in Italy.

Short- and Long-Term Solutions. In response to the aforementioned sudden disruptions in crude oil supply, countries in the region, including Slovakia, have implemented a set of extraordinary measures primarily aimed at maintaining the operational continuity of the refining sector and mitigating the risk of liquid fuel shortages on the domestic market. The key short-term instrument was the release of strategic reserves. As a member of the International Energy Agency (IEA), Slovakia is obliged to maintain crude oil and liquid fuel stocks equivalent to at least 90 days of net imports. According to available data, public stock levels stood at approximately 87 days, while prior to the crisis, they exceeded 160 days, when broader inventories, including commercial stocks, were taken into account. The activation of these reserves – including the allocation by Slovnaft of approximately 250,000 tons of crude oil for current production needs – made it possible to stabilise refinery operations and partially mitigate the supply shock.

From a long-term perspective, infrastructure investments are of fundamental importance, as they are intended to permanently enhance system flexibility and reduce dependence on single supply routes. In this context, a noteworthy project is the planned construction of a liquid fuel pipeline connecting Hungary and Slovakia (this project was announced by Péter Szijjártó, Hungary's Minister of Foreign Affairs, on 16 March 2026 via the X platform). This type of infrastructure, with a length of 127 km and an annual capacity of 1.5 million tons, scheduled to become operational in 2027, is intended to enable direct liquid fuel transport between the refineries in Bratislava and Százhalombatta. The project forms part of the broader strategy to integrate the assets of the MOL Group (which controls both facilities) and would allow for more flexible management of fuel production and distribution in the region. According to the proposal, such a pipeline could offset liquid fuel shortages in one country with surpluses in the other, potentially reducing price volatility and improving supply security.

Conclusions

- Liquid fuel tourism directed towards Slovakia constitutes a direct manifestation of price imbalances between national markets; however, its underlying causes are deeper in nature and stem from disruptions on the crude oil supply side. Price differentials ranging from 0.90 PLN to 1.80 PLN per litre between countries in the region create favourable conditions for fuel tourism, particularly in the heavy transport sector, where the scale of potential savings is substantial.
- The crisis has highlighted Central Europe's persistent vulnerability to energy shocks, resulting from both historical dependence on Russian crude oil and, to some extent, developments on global commodity markets. Despite ongoing diversification efforts and the formal reduction of imports from Russia, in countries such as Slovakia and Hungary, this dependence is not only economic but also technological in nature.
- In the longer term, the stabilisation of the regional fuel market will depend on the ability to enhance system flexibility through infrastructure development and deeper regional integration. Projects such as the reversal of flows along the Druzhba pipeline or the construction of a liquid fuel pipeline between Hungary and Slovakia could significantly improve supply security by enabling greater regional market balancing and more efficient management of liquid fuel flows.