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Effectiveness of Ukrainian attacks on Russia's oil and fuel infrastructure

Ukrainian strikes on Russia's oil and fuel infrastructure are no longer limited to isolated sabotage or military operations; they are now producing measurable economic and organisational effects. A series of attacks on refineries, fuel depots, transshipment terminals, and elements of transmission infrastructure have led to reduced operations at some facilities, disruptions in fuel supply, increased price pressure, and the need for regulatory responses by the Russian authorities. The effectiveness of these actions is determined not only by the physical damage inflicted on facilities but also by their impact on Russia's ability to maintain domestic market stability and meet its export commitments.

Scale of the attacks. In recent months, the number of Ukrainian attacks has increased and also affected key elements of Russia's oil and fuel infrastructure. Strikes or operational disruptions have impacted at least a dozen refineries and fuel facilities, including sites in Moscow, Kirishi, Ryazan, Volgograd, Astrakhan, Nizhnekamsk, Samara, Norsi, Perm, Saratov, Tyumen, Afipsky, Ilsky, and Novoshakhtinsk. Some of these facilities have suspended sales of products on the St. Petersburg exchange, while others have remained completely offline or operated at significantly reduced capacity. It is estimated that by the end of May 2026, refineries accounting for a combined 15–25% of Russia's refining capacity were no longer operational (in terms of reduced crude throughput), while Russian sources unofficially indicated that the figure could be as high as 30%.

The diversification of targets is also significant. Ukraine has not only struck refineries but also fuel depots, maritime terminals, storage tanks, pipelines, and loading arms. At the Tamanneftegas complex, three storage tanks, a pipeline, and loading arms at two berths were reportedly damaged. This approach increases the effectiveness of the strikes because it makes it more difficult for Russia to offset losses solely through rapid repairs to individual installations. Even if some of the damage is reversible within a timeframe of several weeks to several months, simultaneous disruptions to production, storage, logistics, and distribution create a cascading effect. As a result, the attacks affect not only export capacity but also the current availability of fuel on the domestic market (["IEŚ Commentaries", no. 1615](#)).

Fuel shortages in Russia and Central Asian states. The most visible effect of the attacks is the growing fuel shortages in Russia. In some locations, queues appeared at filling stations, retail sales restrictions were introduced, selected fuels became unavailable, and business customers and the agricultural sector faced difficulties. In many regions, refuelling limits were imposed, most commonly at 30–40 litres of petrol and 60–80 litres of diesel per refuelling. Restrictions or supply problems were recorded, among others, in Voronezh, Omsk, Novosibirsk, Vladimir, Tyumen, Bryansk, and Kursk oblasts, as well as in parts of Siberia. The problem was initially wholesale in nature, affecting the short-term market and the fuel exchange, but it gradually spread to retail stations. An additional factor exacerbating the tension was fuel stockpiling by drivers, while according to the Russian authorities, demand may have artificially increased by around 20–30%.

Disruptions in Russia have also begun to affect Central Asian states that depend on Russian supplies or are linked to the Russian fuel market. In Tajikistan, prices rose because the country depends heavily on Russian fuel supplies, which amount to around 20,000 barrels per day and cover roughly 80% of domestic demand, estimated at approximately 25,000 barrels per day. Kyrgyzstan faced shortages of 95 and 98 octane unleaded petrol, which local industry representatives linked to reduced supplies from Russia. In Uzbekistan, where three small oil refineries operate, the situation was relatively favourable; nevertheless, even there, shortages of aviation fuel led to the suspension of some flights to Russia in mid-June 2026. Kazakhstan, in turn, came under pressure due to an increase in the informal outflow of fuel across its approximately 7,000 km border with Russia, where petrol prices



were several times higher than on the Kazakh market. In addition, Kazakhstan offered Russia assistance with fuel supplies¹.

Ukrainian attacks have limited not only Russia's domestic supply but also its ability to maintain its position as a stable supplier to neighbouring states. Under these circumstances, some Central Asian countries are considering alternative import routes, including from China, Azerbaijan, and Turkmenistan. However, they face serious logistical, infrastructural, regulatory, and cost-related barriers. As a result, replacing Russian supplies in the short term remains difficult, and supply pressure may persist for as long as Russia's refining infrastructure remains vulnerable to further strikes.

Restrictions introduced by Russia. The response of the Russian authorities confirms the scale of pressure on the domestic fuel market. As part of the first area of action, the government applied a set of administrative and regulatory measures, including a full ban on petrol exports, introduced in April 2026 and in force until the end of July 2026, as well as a ban on aviation fuel exports, in force from June 2026 to November 2026. It also considered a full ban on diesel exports. At the same time, a partial ban on diesel exports remained in force; it had been introduced at the end of September 2025 and extended until the end of July 2026, covering, among others, traders and small refineries with throughput below 1 million tonnes per year, while excluding major producers. The purpose of these instruments was to redirect more fuel to the domestic market and reduce shortages during a period of seasonally high demand.

In parallel, the authorities took measures aimed at increasing supply and improving logistics; they announced plans to accelerate repairs, reschedule planned shutdowns, increase the utilisation of large refineries, and involve small and medium-sized plants in the production of motor fuels. They also considered importing petrol and diesel from Belarus, other Eurasian Economic Union states, and third countries, while extending zero import duties on petroleum products until the end of June 2027, including from India. Tax changes were to apply retroactively from 1 June 2026 and encourage increased supply by bringing petrol imports and petrol production from components under compensation mechanisms and excise duty refund schemes.

The third group of measures concerned distribution and market standards. In many regions, retail sales limits and bans on filling canisters were introduced, while in Moscow traffic restrictions for fuel tankers were eased. At the same time, the minimum mandatory share of petrol sold on the exchange was reduced from 15% to 10% of production for a three-month period starting on 1 July 2026. Earlier, the abolition or reduction of mandatory exchange-traded volumes had also been discussed; these volumes stood at 15% of production for petrol and 16% for diesel. Furthermore, some refineries were permitted to sell fuels meeting the Euro 3 standard instead of Euro 5. These measures are interventionist in nature and indicate that the Russian authorities are attempting to manage the deficit through rationing, supply shifts, and lower quality requirements, rather than by permanently restoring the full stability of the system.

Conclusions

- Ukrainian attacks have proven operationally effective, as they have led to shutdowns and reduced operations at many important refineries and elements of logistics infrastructure. Their significance stems not only from the number of facilities hit but also from the quality of the targets: strikes have affected high-capacity plants, terminals, fuel depots, and transmission infrastructure. This has resulted in an accumulation of disruptions across fuel production, storage, and distribution.
- The effectiveness of the campaign is reflected in its impact on Russia's domestic market and its regional environment. Shortages, queues, sales limits, and price pressure indicate that the Russian fuel system has limited resilience to simultaneous strikes on multiple infrastructure nodes. The spread of these

¹ С. Антонов, *Казахстан все-таки может отправить в Россию 50 тыс. тонн бензина*, https://kz.kursiv.media/2026-07-03/svan-kazahstan-vse-taki-mozhet-otpravit-v-rossiyu-50-tys-tonn-topliva/?_cf_chl_f_tk=F1IAEb8pzFcF9VEOYErArCCqzyJ3m4TkZlcJqwbE8-1783101867-1.0.1.1-PsD5PYaNjE95DhhwtbkrhyNo7O7MJYqur7X1o3nrbD8 [07.07.2026].



effects to Tajikistan, Kyrgyzstan, Uzbekistan, and Kazakhstan further shows that Russia is losing part of its ability to stabilise the fuel markets of states dependent on its supplies.

- Russian countermeasures are primarily ad hoc and administrative in nature. Export bans, sales limits, lower quality requirements, tax adjustments, and considering importing of fuels may alleviate the most acute symptoms of the crisis, but they do not remove its main cause: the vulnerability of refineries and fuel infrastructure to further attacks. If Ukrainian pressure continues, Russia will be forced to focus on stabilising the domestic market at the expense of exports, and possibly also at the expense of the efficiency of its wartime logistics.