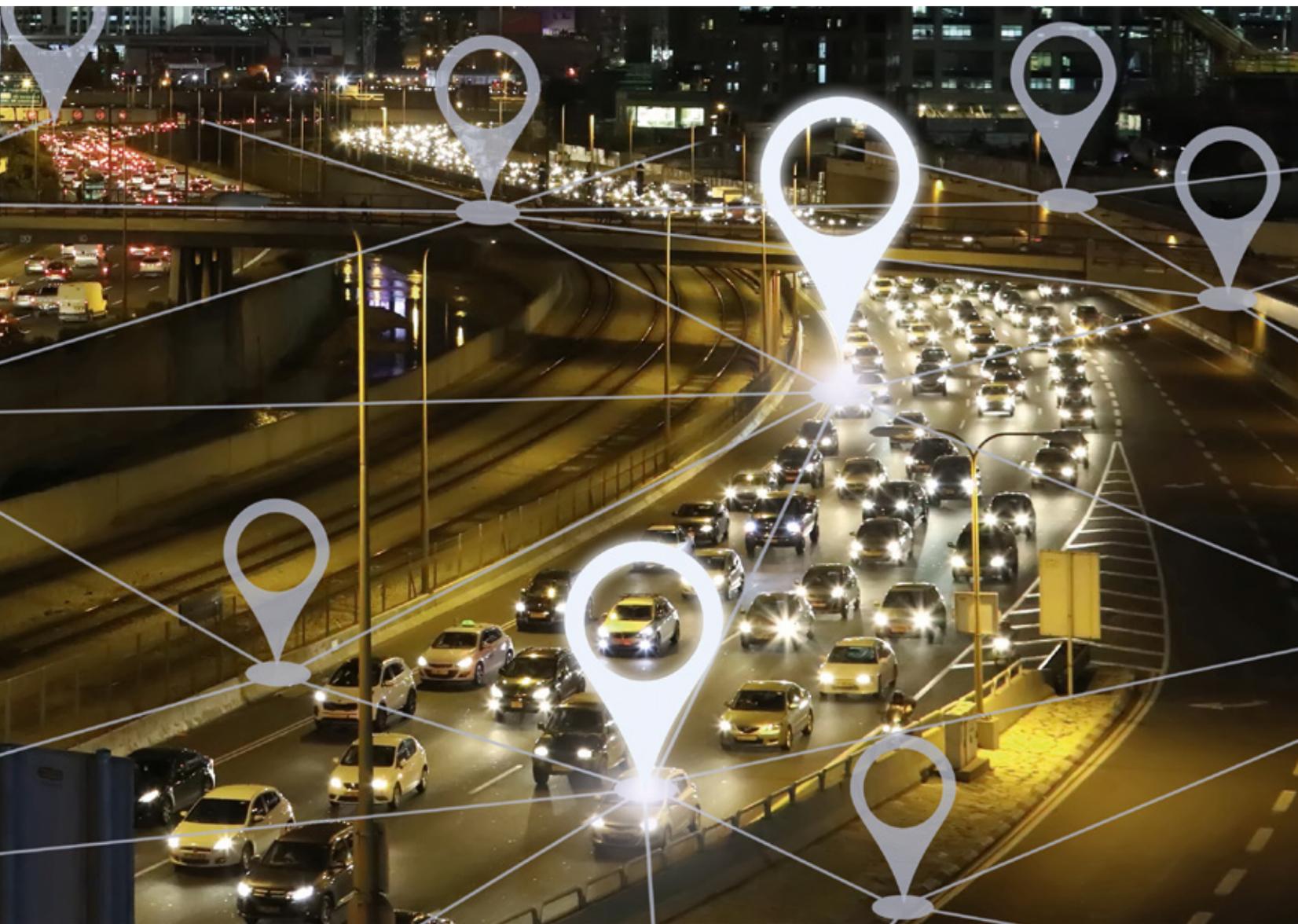


Industry Report Petroleum **2021/22**

KEY FACTS AT A GLANCE



AT A GLANCE

THE AUSTRIAN PETROLEUM INDUSTRY

		2021	2020	2019	2018	2017
Member companies, sold production, employees						
Number of association companies		26	27	27	28	27
Sold production	€ mn	8,824	6,145	9,688	10,170	8,319
Total employees		4,180	4,625	4,402	4,145	4,054
Of which blue-collar		789	833	828	796	787
Of which white-collar		3,328	3,719	3,493	3,261	3,172
Of which apprentices		63	73	81	88	95
Production, import, transport						
Domestic oil production (incl. NGL)	tons mn	0.57	0.61	0.64	0.68	0.74
Domestic natural gas production	m ³ n bn	0.65	0.74	0.89	0.97	1.74
Crude oil import	tons mn	7.64	7.46	8.59	8.31	7.32
Natural gas import	m ³ n bn	4.5	6.13	10.74	7.49	8.09
Oil transport ¹	tons mn	7.74	7.48	8.75	8.36	7.40
Oil refining ²	tons mn	8.4	8.7	10.0	9.8	9.0
Consumption, products						
Domestic oil consumption ³	tons mn	9.97	9.76	11.46	11.28	11.26
Petroleum imports – products ³	tons mn	6.06	6.22	6.64	6.67	6.70
Petroleum exports – products ³	tons mn	3.43	3.26	3.33	3.30	2.90
Domestic gas consumption (end consumers)	m ³ n bn	8.51	7.99	8.34	8.03	8.30
Filling stations, vehicles						
Number of filling stations ⁴		2,748	2,733	2,733	2,699	2,685
Of which major branded		1,322	1,352	1,353	1,357	1,347
Approved vehicles		7,214,970	7,098,814	6,996,222	6,895,596	6,771,395
Of which cars and station wagons		5,133,836	5,091,827	5,039,548	4,978,852	4,898,578

¹ Adria-Vienna pipeline

² Until 2020 including semi-finished products

³ Without petrochemicals or in part without sole biofuels

⁴ Excluding 273 agricultural diesel outlets (2020: 273; 2019: 286; 2018: 286; 2017: 286)

OUR TASKS



Hedwig Doloszeski, Managing Director

The Austrian Petroleum Industry Association (APIA, or FVMI to give it its proper German title) is the Austrian-wide association of petroleum-based industries organised within the Austrian Economic Chamber, interacting in its capacity of statutory interest group between the industry and the public. Its members are companies that operate upstream (exploration and production of crude oil and natural gas), midstream (transport in pipelines) and downstream (processing at their own or associated refineries and sale of petroleum products).

CORE ISSUES RANGING FROM THE ENVIRONMENT TO SOCIAL POLICY

Throughout 2021, the covid-19 pandemic again called for enormous commitment and flexibility on the part of the industry, while climate change continued to be among the top items on the agenda. The petroleum industry perceives itself as a key driver of solutions for the future of energy supply and a dependable partner in implementing an energy turnaround. Our goal is to cope with the challenges of ensuring uninterrupted supply, competitiveness, sustainability and affordability. To manage this, it is necessary to have a clear statutory framework, to which APIA contributes through advisory opinions furnished to ministries and other

government bodies within the industry-specific review of EU directives and national bills and draft ordinances.

APIA covers industry-relevant issues regarding environment and energy – such as energy efficiency, climate strategy, emissions trading, particulate pollution, regulations regarding (biomass) fuels, standards, waste water and garbage disposal and REACH, as well as taxation, commercial law and social policy issues, adding its expertise and organisational input within its working groups in coordination with its member companies and other experts.

Industry-specific information and reports on general business issues are passed on to its members after harmonising them with the relevant departments of the Austrian Economic Chamber.

COLLECTIVE BARGAINING, COOPERATION AND MONITORING

Each January, the Association on behalf of employers negotiates a new collective bargaining agreement with the Union of Private Sector Employees, Journalism and Paper (GPA) and the Production Workers Union PRO-GE for about 4,400 employees in the petroleum industry, which usually enters into force in early February and which is published on the APIA web site and the database of the Austrian Economic Chamber.

The APIA office organises regular and ad-hoc working group meetings and closely cooperates with other organisations in the field, providing assistance to Österreichische Gesellschaft für Energiewissenschaften (Austrian Society for Energy Sciences; ÖGEW), the main office of Grubenrettungs- und Gas-schutzwesen GmbH (mine rescue and gas protection services) and the sectoral committee for SCC (Safety Certificate Contractors).

Next to comprehensively representing its members' interests, one of the Association's primary responsibilities is the weekly poll of petrol station prices which is neutrally assessed by the APIA office and passed on to the EU Commission for an EU-wide comparison. Once a year, APIA produces statistics on petrol stations, which reflect the number of petrol stations broken down by brands and Austrian Länder (states).

The Association perceives itself and its PR work as the mouth-piece of the petroleum industry. Press releases, newsletters, a LinkedIn link and fact sheets on the petroleum market in Austria are typical examples of its output. In a similar vein, APIA's annual report enables readers to track the development of the Austrian petroleum industry across many years.

BODIES OF THE INDUSTRY ASSOCIATION

OFFICIALS & EMPLOYEES

The Association Committee decides on the targets and strategies and is responsible for deciding on budgets and financial statements. Its members are appointed for a term of five years in the course of the elections for the Austrian Economic Chamber. The last election was held in 2020.

APIA ASSOCIATION COMMITTEE

Chairman

Martijn Arjen van Koten
Board Director Refining
OMV Aktiengesellschaft

Deputies

Melanie Milchram-Pinter
Managing Director
BP Austria branch, BP Europa SE

Gert Seybold
Chairman of the Board
Shell Austria GmbH

Members

Ernst Burgschwaiger
Authorised Signatory
ONEO GmbH

Marco Damonte
Managing Director
Eni Austria GmbH

Heimo Heinzle
Managing Director
RED Drilling & Services GmbH

Michael Längle
Company Representative
RAG Exploration & Production GmbH

Alessio Lilli
Managing Director Transalpine Ölleitung
in Österreich Ges.m.b.H.

Markus Mitteregger
General Director RAG Austria AG

Reinhard Oswald
Managing Director
OMV Upstream International GmbH

Josef Rath
Authorised Signatory
OMV Downstream GmbH

Christina Reichart
Authorised Signatory
OMV Solutions GmbH

Armin Springer
Commercial Director
Eni Marketing Austria GmbH

Alfred Stern
General Director OMV Aktiengesellschaft

Stefan Tomann
Managing Director
Erdöl-Lagergesellschaft m.b.H.

Hannes Wartbichler
Managing Director
JET Tankstellen Austria GmbH

Co-opted members

Martin Hussler
Managing Director
MOL Austria Handels GmbH

Peter Pirkner
Authorised Signatory
OMV Aktiengesellschaft

APIA OFFICE

Hedwig Doloszeski
Managing Director

Susanne Gfatter
Waste and chemicals law

Reinhard Thayer
Environment and energy

Gabriela Eder
APIA secretariat,
Safety Certificate Contractors (SCC)

Alessandra Fabro
APIA secretariat, statistics

Sabine Ravasz
ÖGEW secretariat

WE ENERGISE AUSTRIA

THE PETROLEUM INDUSTRY

The companies of the Austrian petroleum industry ensure individual mobility, thereby contributing substantially to value creation and tax revenues. Moreover, the industry provides jobs and offers future-proof training opportunities for the young.

Austria's petroleum industry generates an annual turnover (sold production) of over € 8.8 billion from producing, processing and selling petroleum and its products. The industry is closely interconnected in extensive networks which trigger massive consumption and investment effects both directly and indirectly. It is, furthermore, a key employer, providing work to about 11,000 employees, including its petrol station partners (excluding energy trading).

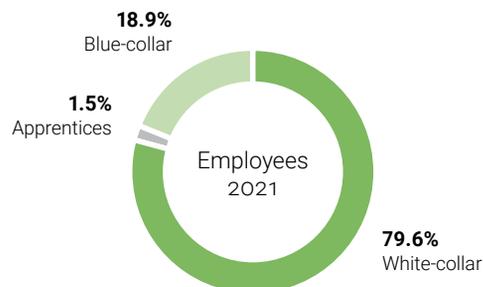
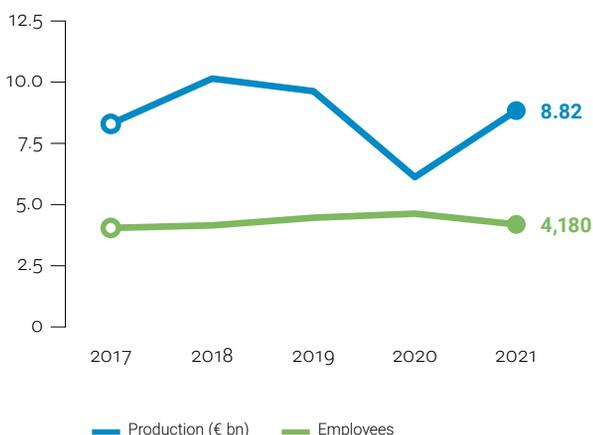
The petroleum businesses ensure sustainable supply security for all of Austria, every day of the year and typically 24 hours a day. In addition to supplying urban areas they cover peripheral places, which requires managing long transport routes and extensive storage capacities. The petrol stations sell much more than just fuels – they have turned themselves into regional service centres that offer a large range of products and services.

Domestic crude production covers about 7% of the country's requirements. Despite their relatively small contribution, local petroleum companies rank among the top European players, due to their excellent technological performance in exploration and production. The crude oil obtained from domestic production and imports is mostly pumped in pipelines to the Schwechat refinery where it is processed into petroleum products. In 2021, its output amounted to 8.40 million tons. With this, the Schwechat refinery delivers about 54% of the Austrian demand for petroleum products and doubles as a major petrochemical location.

Tomorrow's energy market is dominated by issues of supply security. The petroleum industry provides a dense network of storage tanks for petroleum products and natural gas distributed throughout Austria, thereby ensuring that seasonal variations and temporary supply shortages can be compensated.

Sold production and employees

APIA-associated companies



TRANSFORMATION OF ENERGY SYSTEMS

The great challenge for the future is transforming our energy systems in order to achieve the EU's climate protection targets and provide for energy efficiency. Yet the envisaged climate targets will be reached only by the application of a large range of technologies while reducing energy consumption and concentrating on renewables. It requires a strong focus on sustainable solutions and large-scale investment to achieve supply security in the long run.

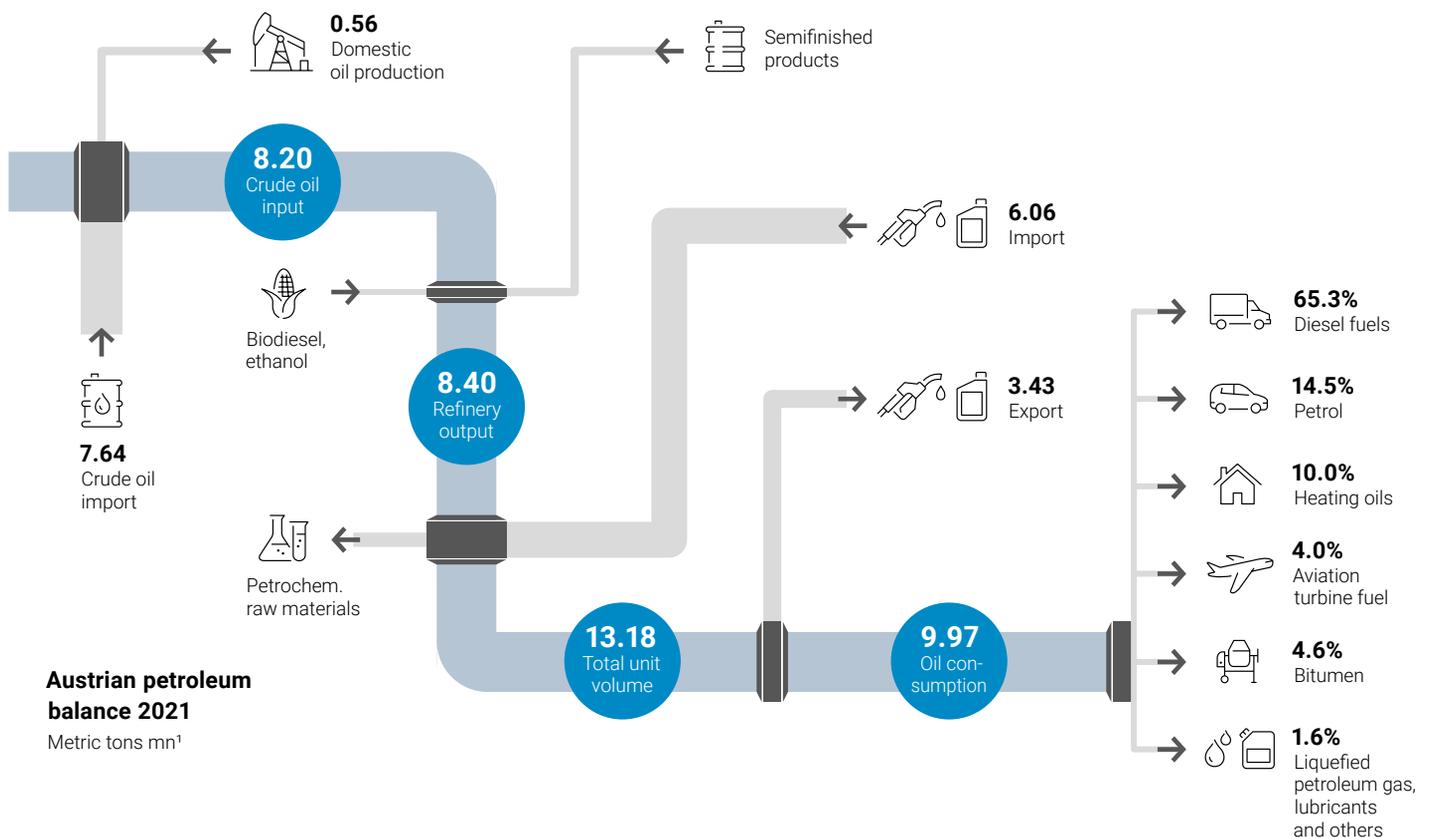
The Austrian petroleum industry contributes to this long-range goal with a number of innovative projects. Thus, with regard to its petroleum products, the industry is making constant progress in reducing CO₂ emissions in refining and in its liquid fuels.

New drive concepts and new fuels are priorities when it comes to furthering mobility. Hydrocarbon-based fuels will continue to play a large role, especially in road transport, long-distance driving, aviation and shipping. It will take quite some time until conceivable alternatives become widespread. It is thus of the essence to improve the efficiency of current technologies until new sources of energy are available at a sufficient scale.

Given the current diversification in propulsion technologies, petrol stations are completely redesigned and reconstructed – the business is in full transformation mode, with different concepts developed for urban and rural contexts. In addition to providing novel fuels, the focus is on offering a full-scale sustainability service which aims to contribute to achieving the climate targets.

Investment into R&D is pivotal for the future. However, to fill its role, the industry – with the petroleum sector foremost – requires political commitment and a technology-neutral legal framework. Given the high cost of investment and operation, it is necessary to provide funding for decarbonisation projects at all levels.

The challenges of an energy transition in terms of supply security, competitiveness, sustainability and affordability cannot be handled by a single energy carrier on its own. It is necessary to accept all available energy carriers since we will continue to need them all for production, transport and heating. Energy and climate policies always need to be seen in a European context and harmonised accordingly.

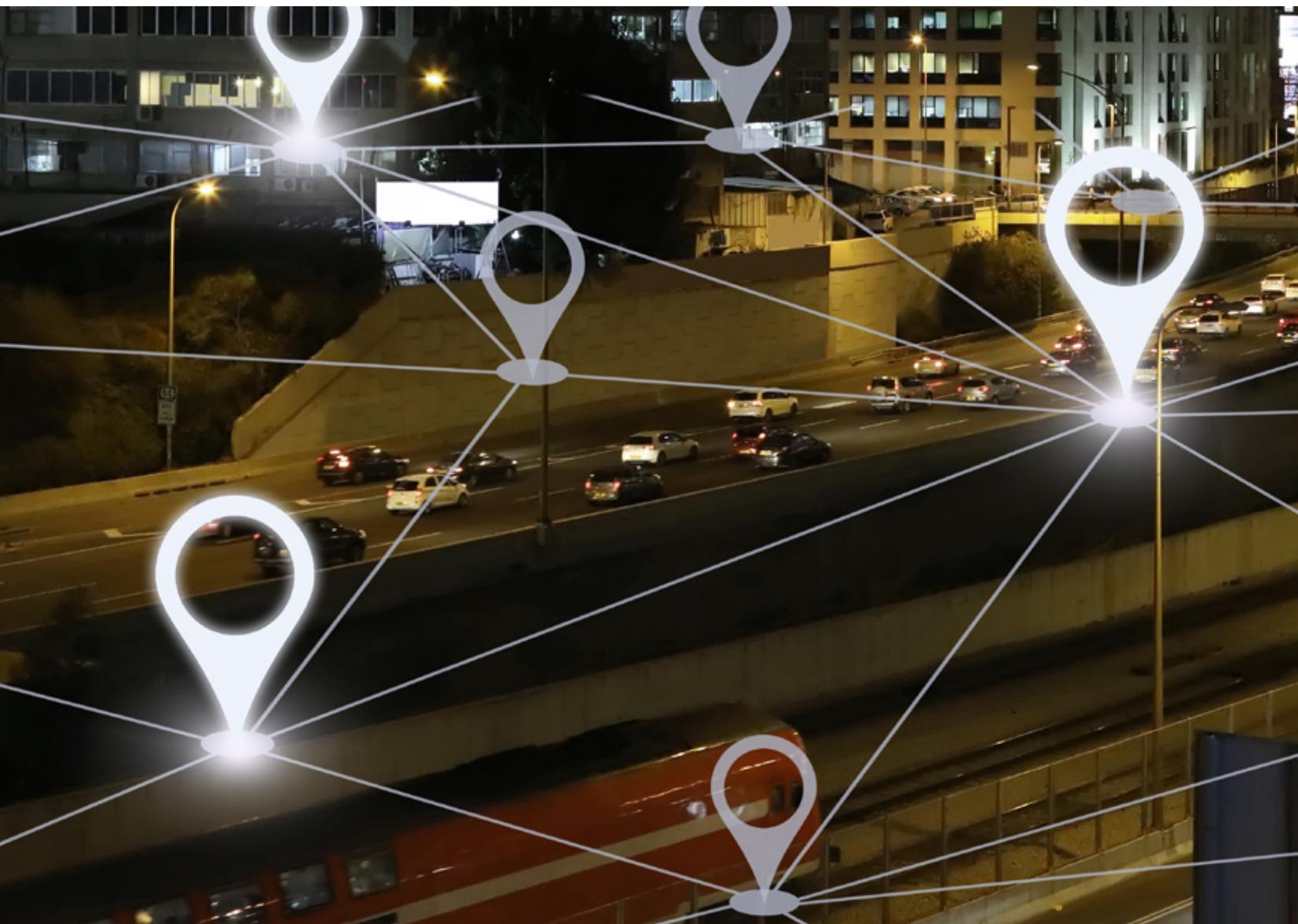


¹ Simplified chart; rounding errors from delimitation differences, double counts and refinery consumption

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