Section 3 – UK Oil and Oil Products
July to September 2019

Key results show:

Total indigenous UK production of crude oil and Natural Gas Liquids (NGL) in Q3 2019 were stable on last year. (Chart 3.1)

Net imports of primary oils (crude oil, NGLs and process oils) in Q3 2019 stood at just 1.5 million tonnes, halving on the previous year as exports remained stable and imports fell by 11 per cent during a period of refinery maintenance. Net imports were equivalent to 10 per cent of the UK’s refinery demand. (Chart 3.3)

Indigenous production of petroleum products was down in Q3 2019 by 6.6 per cent on the same quarter of last year. In contrast production in the year to date has increased by 0.6 per cent in the year to Q3, as a result of low production resulting from refinery maintenance in early 2018. (Chart 3.2)

Trade in petroleum products was down in Q3 2019 compared to the same period a year earlier, with imports stable and exports down 19 per cent. The UK has been a net importer of petroleum products since 2013, by 3.8 million tonnes in Q3 2019 where it remains short in middle distillates such as road diesel and jet fuel. (Chart 3.2)

Total deliveries of the main transport fuels were down 2.1 per cent on a year earlier. Excluding the biofuel component, diesel deliveries decreased by 2.7 per cent in line with recent trends back towards petrol consumption, where deliveries increased by 0.6 per cent. The diesel share of road fuels is now 68 per cent. (Chart 3.5)

Overall stocks of crude oil and petroleum products stood at 15.0 million tonnes, up 5.0 per cent on the same period last year. (Chart 3.6)

Relevant tables

3.1: Supply and use of crude oil, natural gas liquids and feedstocks
3.2: Supply and use of petroleum products
3.4: Supply and use of petroleum products: latest quarter
3.5: Biofuels sales and sales through supermarkets
3.6: Stocks of petroleum at end of period

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Indigenous UK crude oil production in Q3 2019 was stable on Q3 2018 (up 0.5 per cent), with production of NGLs down by 4.4 per cent. Overall indigenous production was up 0.2 per cent.

Exports of primary oils remained stable while imports were 11 per cent lower than Q3 2018 during a period of refinery maintenance.

As a result, net imports of primary oils (crude, NGLs and feedstocks) halved, down from 3.0 million tonnes in Q3 2018 to 1.5 million tonnes in Q3 2019.
Indigenous production of petroleum products at refineries in Q3 2019 was 6.6 per cent less compared with a year earlier as a result of refinery maintenance. Imports of petroleum products were stable in Q3 2019, with exports down 19 per cent as a result of reduced refinery production.

Whilst the trade balance on some products has varied slightly on the same quarter last year, the broad pattern is similar to last year with the UK reliant on imports of middle distillates (particularly road diesel and jet fuel which equal over two thirds of imports) and strong exports of petrol (which have comprised nearly 50 per cent of the UK’s petroleum product exports in 2019 to date).
Net imports of primary oils (crude, NGLs and feedstocks) halved from 3.0 million tonnes in Q3 2018 to just 1.5 million tonnes in Q3 2019. New developments in the North Sea have increased UK exports, notably towards the end of the year, with a corresponding decrease in net imports. Net imports decreased sharply early in 2018 following the shut-down of the Forties pipeline system.

In Q3 2019 the UK was a net importer of petroleum products by 3.8 million tonnes, an increase from 2.7 million tonnes seen last year following weak exports this year during the period of refinery maintenance.
Final consumption in the oil sector has a small seasonal element with different products peaking at different times of the year. Consumption of domestic fuels for heating peaks in Q1 and Q4 each year, and consumption of aviation fuels is higher in Q2 and Q3.

Final consumption of petroleum products in Q3 2019 decreased 3.1 per cent, driven by lower demand for transport fuels and petroleum products for non-energy use. Demand for petroleum products in the domestic and other final users sectors showed increases on the same period last year as a result of campaigns to encourage customers to buy early in preparation for the winter.
Transport fuels accounted for 74 per cent of demand for petroleum products, with road fuels alone accounting for more than half of total demand.

Consumption of all transport fuels was down 2.1 per cent on last year. Hydrocarbon motor spirit sales saw an increase (up 0.6 per cent), which was countered by a decrease in hydrocarbon road diesel (down 2.7 per cent) in continuation with recent trends as more motorists switch away from diesel. Deliveries of aviation turbine fuel were similar to the same period last year, down 0.9 per cent.
At the end of Q3 2019 total stocks for all oil were up by 5.0 per cent (0.7 million tonnes) compared to the same point in 2018.

Stocks of primary oils were down by 8.7 per cent, with increases of stocks held offshore but larger falls in stocks held at refineries, terminals and under bilateral agreements.

Product stocks increased by nearly one-fifth, with an increase in product stocks (notably petroleum coke) and in volumes held under bilateral agreements.

Chart 3.6 combines stocks of products with the product equivalent of stocks of crude oil to give an overall level of UK stocks of key products. In Q3 2019 the UK stockholding was comprised of just over half (55 per cent) petroleum products, with the remainder as primary oils.

At the end of the Q3 2019, the UK had stocks equal to around 60 days of demand, or 180 days of net imports.

Further information on how the UK meets its oil stocking obligations are set out at: www.gov.uk/government/publications/uk-emergency-oil-stocking-international-obligations