Fuel Security in Australia: An Annotated Bibliography

SEA POWER CENTRE AUSTRALIA

Author: Lieutenant Robert Rushby

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Photo by: Lieutenant Commander BJ Glover CSC RAN – ADV *Reliant* Refuelling.

Key takeaways from recent analysis

- The 2013 NRMA liquid fuel study, ***Australia's Liquid Fuel Security: A Report for NRMA Motoring and Services***, sets out Australia's dependence on liquid fuel imports, the lack of resilience in the system and the rapid and significant implications of disruption to the supply chain. Since then, multiple analysts have highlighted that strategic risks to Australia's fuel supply chain were not well understood and were not being mitigated.
- Petroleum industry groups have challenged this view and contend that there is a high level of supply security and reliability for liquid fuels, particularly due to the diversity of supply sources built into the Australian system.
- It is clear that seaborne movement is a prominent feature of the Australian fuel market. Therefore, the maritime supply chain is a key sensitivity in the security of supply to the Australian market. Some commentators have argued that an Australian-controlled fleet of petroleum tankers would reduce the risks to Australia's liquid fuel supply chains.
- In response to recent conflicts, some analysts have warned that the vulnerability of Australia's fuel supply is no longer a theoretical risk but an active, accelerating threat.
- Northern Australia is seen as being at particular risk, given its reliance on limited supply lines and infrastructure. However, it is also central to Australia's defence posture and economic prosperity.
- Lifting the capacity of domestic fuel security is identified as a key measure, which is perhaps more valuable and reliable than an offshore national oil reserve.
- A multi-pronged approach to fuel security is required in Australia. This approach should include synthetic fuel production and solutions aimed at reducing the demand for fuel.
- Defence's transition towards renewable energy sources would increase its operational independence and resilience.
- Australia has significant potential to build a low carbon liquid fuels industry to reduce the nation's reliance on imported fuels and strengthen fuel security. The cost of low carbon liquid fuels and the availability of feedstocks may limit their initial adoption.

Fuel security in Australia

Strategic risks to fuel security

A landmark report on Australia's fuel security, ***Australia's Liquid Fuel Security: A Report for NRMA Motoring and Services*** by Air ViceMarshal John Blackburn AO (Retd), was published on 28 February 2013. Blackburn warned that Australia's strategic assumptions were wrong, arguing that the country had 'adopted a "she'll be right" approach to fuel security' (2013: 21). He warned that Australia is heavily dependent on imports of refined petroleum products and crude oil. While this oil dependency made a certain economic sense during times of normal supply, the resulting lack of diversity in sources of fuel supply could negatively affect Australia's resilience in the event of supply interruptions or reduced availability. Blackburn expressed a lack of confidence that the strategic risks to Australia's fuel supply chain were well understood or were being mitigated by the nation's leaders, the business community or in the demand choices of the general population.

Blackburn returned to these comments in June 2025 when interviewed by James Nason in '**Fuel Blind: National security expert warns Australia still ignoring a crisis**'. Blackburn maintained that Australia's 'sleepwalking' was having significant implications for the country's food supply

and agricultural sector. Blackburn stated that the then Morrison government's 2022 commitment to undertake a national fuel risk assessment had not been realised, and he criticised what he termed 'creative accounting' practices that artificially boosted fuel stocks on hand by including fuel that was still en route to Australia.

In Malcolm Sutton's (2016) article '**Defence White Paper 2016: Dependency on fuel imports "a risk" amid South China Sea tensions**', Blackburn was quoted as saying that 'Australia's food, water and medicine distribution was entirely reliant on transport fuel' and that Australia was 'heading towards 100 per cent import dependency'. Sutton noted that the Australian Institute of Petroleum (AIP) maintained that with 'refined fuel coming from 20 different countries and crude oil from 17, Australia's supply is diverse and flexible enough to respond to any emergency in supply and had done for decades'. However, Sutton drew on the work of several analysts and commentators to conclude that a potential conflict in the South China Sea could disrupt Australia's fuel supply.

Australia's liquid fuel supply chains

In ***Maintaining Supply Security and Reliability for Liquid Fuels in Australia***, the AIP (2013) argued that Australia enjoys a high level of supply security and reliability for liquid fuels. From the AIP's industry-based perspective, the Australian liquid fuels supply was highly secure, competitively priced and reliable due to having:

- an established and effective integration into the rapidly growing Asian fuels market;
- a diversity of supply sources for crude oil and refined products;
- a flexible, resilient and reliable supply chain, including a significant volume of stock on the water;
- a domestic refining capability providing multiple supply options; and
- robust frameworks for risk management and emergency management at industry and government levels.

The AIP argued that a market-based approach to liquid fuel supply and infrastructure development would enable Australia to maintain secure, reliable and competitively priced liquid fuel supplies. The AIP's overview of the liquid fuels market in Australia identified key roles for different levels of government in ensuring effective monitoring and assessment of the liquid fuels market. The AIP (2019) made a similar argument in its ***AIP Submission: Interim Report–Liquid Fuel Security Review*** to the Department of the Environment and Energy. The view of the AIP was echoed by Shipping Australia (2021) in '**Supply chain: Australia's fuel supply chain is secure and resilient**'.

The AIP's perspective is also reflected in Richard Hale and Ian Twomey's (2013) findings in ***Australia's Maritime Petroleum Supply Chain***. In this report, Hale and Twomey acknowledged that seaborne transport was critical to the Australian petroleum market and, therefore, the maritime supply chain was a key sensitivity in the security of supply. They found that Australia's supply routes were diverse and were likely to remain that way, even with refinery closures, as more refined fuel imports started to come from locations other than Singapore. Hale and Twomey also argued that, due to the time it takes a ship to travel around Australia, imported fuel supplies spend a considerable part of their voyage in Australia's exclusive economic zone. Hale and Twomey contended that the number of tanker vessels servicing Australia would increase, and they could not envisage a scenario in which shipping was not available because the petroleum tanker market had collapsed. However, they did recognise that disruption of tanker-carried supply could arise as a result of other events that could impact the supply chain, such as geopolitical crises.

Storage, infrastructure and strategic fuel reserves

John Francis (2018) presented a very different view in ***Australia's Fuel Security: Running on Empty***, a report prepared for the Maritime Union of Australia. Francis stated that Australia was facing a fuel security crisis, that Australian Government statistics showed average reserves were at three weeks or less, and that, since March 2012, Australia had not complied with the International Energy Agency's 90-day fuel stockholding obligation. The situation had prompted the then Morrison government to announce a National Energy Security Assessment to address concerns over declining domestic production, diminishing refining capacity and potential flashpoints in the Middle East and the South China Sea. The report investigated the feasibility and cost of allocating a portion of supply chain shipping tasks to an Australian-controlled fleet of petroleum tankers to reduce the risks to liquid fuel supply from both geopolitical threats and economic instability. Francis contended that the cost of addressing these risks was comparatively low: carrying Australia's entire fuel imports in Australian tankers would cost less than one cent extra per litre. The report argued for a thorough risk assessment to investigate the potential impact of geopolitical and economic disruption across all major elements of the national and regional petroleum supply chain. Francis suggested that a satisfactory investigation into those issues should encourage Australia to move petroleum supply chain arrangements from the current 'just in time' to a 'just in case' structure.

Notwithstanding relevant industry positions, the Australian Government introduced the ***Fuel Security Act 2021*** **(Cth)** (the Act) to establish a national fuel reserve, aiming to minimise the impact of supply disruptions on fuel users and industries, including in the construction, transport and resources sectors. The Act and the *Fuel Security (Minimum Stockholding Obligation) Rules 2022* (Cth) require persons importing or refining gasoline, diesel and kerosene, in quantities exceeding 200 megalitres for gasoline and 250 megalitres for diesel and kerosene, to hold a minimum quantity of those fuels (the Minimum Stockholding Obligations [MSO]). The MSO were set at levels to ensure that there would be sufficient fuel in reserve to meet several days of national demand. The Department of Industry, Science, Energy and Resources (2021) prepared the ***Securing Australia's Domestic Fuel Stocks and Refining Capacity Regulation Impact Statement*** to examine the impacts of implementing the MSO, the permanent production payment and funding for refinery upgrades measures, and the associated regulatory burden. The Department of Climate Change, Energy, the Environment and Water's '**Australian's Fuel Security**' webpage lists the full suite of measures that have been introduced to support domestic fuel security, and protect consumers and the economy from supply disruptions.

The issue of fuel security also was recognised in the Department of Defence's (2023) ***National Defence: Defence Strategic Review 2023 (DSR)***, which called for action on fuel vulnerabilities and single points of failure. The DSR stated that fuel distribution in the north and north-west of Australia must be made more effective and less vulnerable by introducing a more productive and predictable supply approach. Deep Defence engagement with the fuel industry, with a focus on building shared understanding and awareness of capabilities and requirements, was also considered vital. The DSR recommended that a 'whole-of-government Fuel Council should be established as soon as possible with representatives from relevant departments and industry to deliver resilient national fuel supply, distribution and storage' (2023: 77).

David Uren (2024) reflected on the integral relationship between fuel and national security in ***The trade routes vital to Australia's economic security***. Uren discussed how concerns regarding Australia's vulnerability to an interruption to fuel supplies led to a series of policy interventions between 2020 and 2024. These policy interventions included 'investment in oil stocks in the US,

strengthened stockholding requirements for Australian oil distributors and subsidies to ensure the continued operation of Australia's last two oil refineries' (2024: 24). He noted that the Australian Government's commentary on the rationale for the AUKUS program and its investment in nuclear-powered submarines suggested that it had considered the need to protect liquid fuel supply shipments. While Uren regarded Australia's dependence on imported liquid fuels as a strategic vulnerability, he noted that Australia's energy security was enhanced by the diversity of supply. Uren cited a review of liquid fuel security by the Department of Environment and Energy (2019), which observed that Australia sourced refined products from 66 countries and crude oil from 40 countries. About 60 per cent of refined fuel supplies came from North Asia, around the east of Papua New Guinea, and 40 per cent came from South-East Asia.

Raelene Lockhorst (2025) discussed the vital importance and vulnerability of northern Australia in '**House of cards: northern Australia's liquid fuel resilience**'. Lockhorst described northern Australia's liquid fuel infrastructure as the backbone of defence capability, national resilience and economic prosperity, but noted it faced mounting pressure from increasing demand, supply chain vulnerabilities and logistical fragilities. To address these vulnerabilities, Lockhorst reasoned that Australia should activate Melville Island's dormant fuel reserves, develop a domestic fuel refinery in the Northern Territory (NT), harden the logistics backbone, and integrate fuel capacity from Vopak's fuel import and distribution terminal and Nhulunbuy, NT, into a contingency network.

The lack of bulk storage capacity in Australia was the main concern for John Coyne and Hal Crichton-Standish (2020) in '**Australia must fast-track new domestic storage to ensure fuel security**'. The authors recommended that the Australian Government prioritise a stocktake of existing domestic fuel storage facilities and examine which planned projects could be expedited to ensure greater fuel security for Australia. Writing with reference to an agreement between the Australian and US governments to store Australian oil in the US Strategic Petroleum Reserve, Coyne and Crichton-Standish argued that lifting the capacity of domestic fuel security was more valuable and reliable than having an offshore national oil reserve. The authors argued that lifting capacity would overcome the vulnerability of long supply chains, the dependence on the availability of maritime assets, the lengthy shipping time from the west coast of the US (estimated at 35 days), high tanker and insurance rates in the event of conflict, and the US having priority access to all of the reserve, including Australia's portion, in the event of a conflict.

In ***Over a Barrel: Addressing Australia's Liquid Fuel Security***, Liam Carter, Audrey Quicke and Alia Armistead (2022) examined how the war in Ukraine highlighted the dangers of complacency with respect to fuel security and the links between economic security and international security. The authors stressed Australia's declining fuel security and its increasing reliance on refined fuels and crude oil to meet consumption. Carter, Quicke and Armistead noted that five Australian refineries closed between 2012 and 2022, leaving only two Australian refineries in operation–Ampol's Lytton refinery in Queensland and Viva Energy's Geelong refinery in Victoria. To compound the issue, the authors noted that these two remaining refineries are set up largely to produce petrol rather than aviation fuel and diesel.

Demand-side solutions, synthetics and renewable alternatives

Carter, Quicke and Armistead (2022) further contended that there was a need for demand-side solutions to Australia's fuel security vulnerability, noting that three quarters of Australia's total liquid fuel demand is consumed by the transport sector and over half is consumed by road transport. The authors proposed that greater uptake of electric passenger vehicles would be the best way to improve Australia's liquid fuel security in the medium term and to

address diesel and aviation fuel insecurity at the national level. The paper made a series of strategic recommendations to achieve a transition to electric vehicles and the increased use of public transport.

In ***Fuel security in Australia and the International Energy Agency's 10-point plan***, Rod Campbell (2024) made similar arguments in his analysis of Australia's fuel security policy response to the Russian invasion of Ukraine and the International Energy Agency's (IEA) 10-point response plan to the conflict. Campbell noted that Australia's fuel security concerns were exacerbated following Russia's invasion of Ukraine and the resulting 'looming emergency for global energy security' (2024: 2) described by the IEA. The IEA's 10-point plan intended to cut oil use, estimating it could cut oil demand by 2.75 million barrels a day in 'advanced economies' within four months.

The utility of synthetic fuels and an accelerated transition to electrical vehicles was explored by Marcus Hellyer (2021) in '**Will synthetic production solve Australia's liquid fuel problem?**' Hellyer described the strategic risk associated with fuel insecurity and also noted the huge balance-of-payments deficit it creates, which generates other economic vulnerabilities. Hellyer demonstrated that the technologies for synthetic fuel production are mature and there are examples of production on a commercial scale, citing the example of South African company Sasol, which produced 25 megalitres per day–the equivalent of approximately 15 per cent of Australia's daily requirements or 23 per cent of imports in 2021. However, Hellyer noted that market dynamics and the uncertain future of carbon fuels were disincentives to investment in this solution.

The situation is similar in petroleum refining. In 2021, the Australian Government announced a subsidy of up to $2 billion over the coming decade to Australia's last two refineries to ensure they could keep operating. Hellyer expanded on Yildirim's (2021) contention that synthetic fuels need to be a step on the path to full renewables, especially if 'the challenge is to ensure national resilience and sustain the Australian Defence Force's capability in time of conflict'. An adversary cannot 'turn off the sun or wind' Hellyer quipped. He also postulated that accelerating the take-up of electric vehicles for personal transport, trucking, agriculture and mining is needed to massively reduce Australia's dependence on imported liquid fuels. Hellyer concluded that a multi-pronged approach to fuel security is required, which should include some synthetic fuel production.

In '**Australia's fuel insecurity is not hypothetical**', Raelene Lockhorst (2025) warned that Australia's lack of fuel security remained a strategic vulnerability, despite more than a decade of advocacy to redress the issue. Lockhorst cited recent global conflicts and strikes on shipping in the Red Sea to demonstrate that the vulnerability of Australia's fuel supply 'is no longer a theoretical risk; it's an active, accelerating threat'. The author positioned northern Australia as being both at particular risk, because of the region's reliance on limited supply lines and infrastructure, but also as central to Australia's defence posture and economic prosperity. Lockhorst viewed biofuels as one element of the solution to addressing fuel insecurity but added that 'biofuels alone cannot meet Australia's liquid fuel demands, let alone guarantee fuel availability in times of crisis'. Lockhorst also suggested that synthetic fuels were a compelling and viable alternative, noting their decentralised production as a critical advantage. Lockhorst proposed that northern Australia 'could host a new generation of co-located defence, biofuel and synthetic fuel production hubs'. The author also argued for additional government engagement to develop Australia's understanding of fuel as a critical asset, rather than just a commodity. Lockhorst postulated that Australia needed a 'whole-of-government fuel strategy that elevates energy security to a national security priority'.

In ***The Australian Defence Force and its future energy requirements***, Ulas Yildirim and William Leben (2022) pointed out that fossil fuels, such as diesel and jet fuel, will continue to be in use for a long time in long-lived military systems. The risks to the ADF extend beyond those created by insufficient reserves and the reduced capacity of remaining refineries, and the ADF must begin to plan and act to shape its energy future. Futureproofing the ADF requires the growth of an alternative fuels sector in Australia. The authors argued that Defence needs to facilitate a rapid transition towards renewable energy sources, otherwise Australia's dependence on imports for liquid fuel security places the ADF at risk. Yildirim and Leben defined the risk to the ADF as follows: 'The risk isn't whether the ADF can get to an area of operations and perform poorly but whether it can get there at all' (2022: 4). The report argued that a rapid transition to renewables would make the ADF more effective in doing what the Australian Government directs and demands and made six recommendations to help achieve this transition.

In '**Decreasing Reliance on Fossil Fuels to Increase Defence Capability**', Benjamin Cole (2022) likewise proposed that adopting climate-friendly strategies to reduce ADF dependency on fossil fuels would alleviate the strategic risks of Australia's fuel insecurity. Cole contended that implementing a program to achieve net zero within Defence would increase Defence's operational independence and resilience, enhancing capability. Cole particularly urged this approach in relation to aviation fuel sourced primarily from overseas. Cole stressed that implementation of sustainable aviation fuels, amongst other measures, would reduce fossil fuel dependency, increasing military capability while also contributing towards achieving a net-zero economy.

In '**Australia looks to sustainable fuels to secure energy future**', the Australian Trade and Investment Commission (Austrade) (2025) announced that decisive action was being taken, in mid-2025, to build a low carbon liquid fuels (LCLF) industry to reduce the nation's reliance on imported fuels and strengthen fuel security. In setting out the rationale for a domestic LCLF industry, Austrade highlighted that Australia imported 80 per cent of its fuel, with 65 per cent coming from just three countries; at the same time, domestic refining capacity had decreased to 14 billion litres. The publication noted that the Australian Government identified Australia's LCLF industry as a priority sector under the Future Made in Australia plan.

Julian Traill (2024) focused on a different Government measure in '**Understanding Australia's minimum stockholding obligation and its role in addressing the nation's fuel security challenge**'. Traill explained that the introduction of the MSO under the ***Fuel Security Act 2021*** **(Cth)** had underscored the importance of traditional liquid fuels to safeguarding Australia's energy security. In his briefing, Traill examined the impact of the MSO on Australia's liquid fuels sector, including potential future developments and predicted implications for industry arising from the, at the time, forthcoming changes to the MSO, which came into effect on 1 July 2024.

A report by Deloitte for Bioenergy Australia (2025), ***Securing our Fuel Future: Resilience Through Low Carbon Liquid Fuels***, confirmed that, without strategic intervention and investment, sectors that rely on liquid fuels face the threat of total dependence on export markets and rising costs. According to the report, Australia has the potential to produce 2 billion litres of LCLF–such as sustainable aviation fuel and renewable diesel–based on the current project pipeline and investment. The report noted that with additional investment in refining and infrastructure to match Australia's feedstock potential, Australia's LCLF production could grow to displace 19 per cent of the imports required by 2040, and up to 47 per cent by 2050.

In ***Refined Ambitions: Exploring Australia's Low Carbon Liquid Fuel Potential***, the Clean Energy Finance Corporation and Deloitte (2025) reported that Australia had a $36 billion opportunity to

establish a world-leading LCLF industry, reduce emissions by 230 million tonnes by 2050 and lessen reliance on imported fuels. The report found that LCLFs are crucial to Australia's net-zero future, particularly for sectors such as aviation, mining, heavy freight and defence, where electrification is challenging.

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