

The war in Ukraine: A moment of reckoning for the oil and gas industry



Percentage of sectoral energy demand addressed with natural gas from Russia

	Germany	France	Italy	UK	Spain	Belgium	Poland	Sweden
Power generation	4%	0%	11%	0%	1%	1%	1%	0%
Iron/steel	4%	1%	7%	0%	1%	1%	4%	0%
Chemical/petrochem including feedstocks	6%	1%	4%	0%	1%	1%	5%	0%
Non-ferrous metals (e.g., aluminium)	8%	1%	13%	1%	1%	1%	6%	0%
Non-metallic minerals including cement	8%	2%	11%	1%	2%	1%	5%	0%
Machinery/transport equipment (estimate)	7%	2%	8%	1%	1%	1%	5%	0%
Paper/pulp/printing	7%	2%	7%	0%	1%	1%	2%	0%
Wood/wood products	1%	0%	1%	1%	0%	0%	1%	0%
Textile/leather	11%	2%	12%	1%	2%	1%	6%	0%
Food and tobacco	12%	2%	9%	1%	1%	2%	6%	0%

Sources: Accenture analysis with data on consumption from Eurostat data [Imports of natural gas by partner country](#) and [Simplified energy balances](#) 2020 or latest year, and data on non-energy use / feedstock from [IEA WEO](#) 2020 and 2021.

Note: Share of imports based on share of Russia in total national imports of the commodity, applied to percentage of the commodity in the industry-specific energy mix, assuming imported gas is distributed equally across industries.