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European Commission
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By email

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Re: Urgent need for EU coordination due to current dramatic global oil supply disruption

As you are aware, the disruption of maritime energy flows through the Strait of Hormuz is creating severe turbulence in global energy markets. This shock is rapidly and profoundly impacting fuel availability, fuel prices and transport costs across the EU. As Member States are already reacting to this acute crisis in very different directions, we implore you to take the lead on a coordinated EU response.

IRU seeks your support in three areas:

- *Strategic oil reserves*: Activate EU coordination under the Oil Stocks Directive and encourage Member States to align with the coordinated release of reserves by the International Energy Agency (IEA), including voluntary releases by EU countries not participating in the IEA mechanism.
- *Excise duties*: Encourage Member States to make full use of the flexibility available under the Energy Taxation Directive, including temporary reductions in fuel excise duties and, where necessary, support applications for derogations allowing temporary reductions below minimum levels.
- *State aid rules*: Build on the approach taken during the 2022 energy crisis and establish a targeted crisis flexibility framework allowing Member States to provide support to companies facing exceptional cost pressures, including through a temporary ceiling of up to €600,000 per undertaking.

Strong leadership from the European Commission will be essential to help align national responses and ensure that this crisis, which affects the Union as a whole, is addressed through a common EU approach rather than through 27 different national measures affecting a single market.

Release of strategic oil reserves

Early signals received from IRU members suggest that disruptions to fuel availability are already happening in some Member States, with fuel rationing reported at supplier level. While it remains uncertain whether these developments reflect genuine shortages or precautionary reactions in the market, they nevertheless raise serious concerns for the transport sector. Based on previous experience in situations of perceived scarcity, suppliers commonly prioritise deliveries to the home heating oil sector. If oil scarcity were to intensify, this could significantly constrain diesel availability for freight transport, given that well over

90% of the EU truck fleet currently runs on diesel, with immediate consequences for logistic chains and, implicitly, economic flows across the Union.

Following the recent coordinated release of strategic oil stocks by the International Energy Agency, stronger coordination at EU level would therefore be particularly important to ensure consistency across the EU. Not all EU Member States participate in the IEA mechanism, meaning that responses regarding the release of strategic reserves are already diverging. While countries that are members of the IEA have agreed to contribute to the coordinated release, the position of other Member States remains unclear. Given that all EU countries are subject to common obligations under the Oil Stocks Directive, such divergence risks undermining the effectiveness of the overall response and sending inconsistent signals to energy markets.

We therefore call on your support to encourage voluntary releases by EU countries not participating in the IEA mechanism. This would help reinforce the stabilising effect of the international response, prevent precautionary restrictions at supplier level and ensure the continued availability of fuel for essential logistics operations across the Union.

Financial support through excise duties and state aid

Diesel prices have reacted sharply to the new crisis, with increases between 18% and 20% reported from Greece to France since the start of the war in Iran. Fuel prices typically represent around one third of total operating costs in road freight transport.

In practice, a large share of transport contracts do not allow rapid indexation of fuel costs, as many clients refuse to adjust prices at the pace of unforeseen market developments. Transport operators, and SMEs in particular, are therefore forced to absorb sudden cost spikes that can rapidly erode margins and liquidity. With companies operating on average margins of around 2%, very limited room remains to withstand such dramatic shocks. Without rapid and coordinated support measures, this situation risks triggering a wave of financial distress and business failures across the sector.

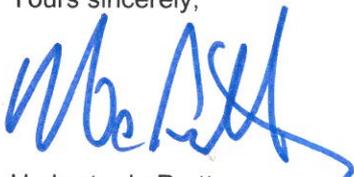
Recalling the European Commission's guidance during the 2022 energy crisis, IRU calls on you to actively engage with Member States and promote a coordinated EU response on fuel taxation, often a large component of the final price paid at the pump. In particular, Member States could be encouraged to make full use of the flexibility available under the Energy Taxation Directive, including temporary reductions in excise duties, while supporting applications for derogations where Member States may need to go below the minimum levels. Depending on the evolution of the crisis, the Commission could also assess whether the current minimum tax levels remain appropriate and, if necessary, consider proposing temporary adjustments at EU level. Such coordination would help cushion the impact of fuel price spikes on transport operators while avoiding distortions in the internal market.

Also recalling the European Commission's response to the 2022 energy crisis, IRU calls for additional support through the State aid framework. The existing De minimis Regulation already increased the general de minimis ceiling to €300,000. However, in the current context this may prove insufficient. A temporary crisis measure allowing Member States to grant support of up to €600,000 per undertaking would provide proportionate and targeted relief. Such flexibility would help Member States willing to support companies bridge the period of extreme price volatility while safeguarding the continuity of EU logistics chains which are vital to the proper functioning of the internal market.

At a time when national responses are beginning to diverge, IRU calls on your leadership to help align Member State actions, stabilise markets and ensure that the EU's logistics and supply chains continue to function smoothly during this period of heightened uncertainty.

Thank you in advance for your immediate attention to this urgent request.

Yours sincerely,



Umberto de Pretto
Secretary General