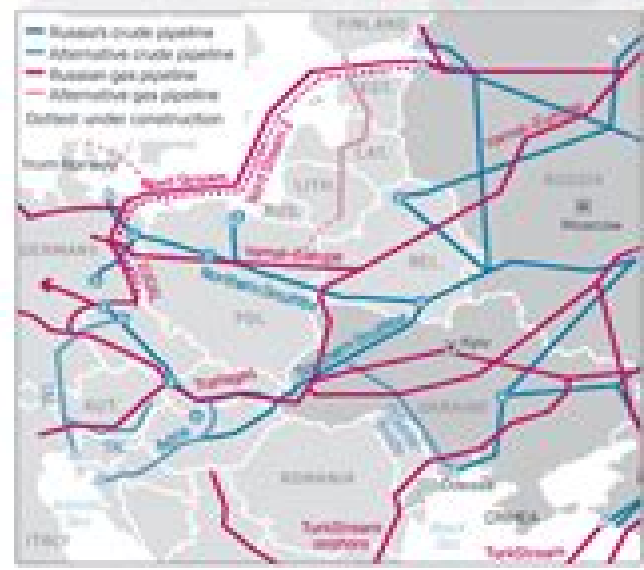


RUSSIAN INVASION OF UKRAINE PUTS SPOTLIGHT ON SECURITY OF OIL, GAS AND COMMODITIES FLOWS

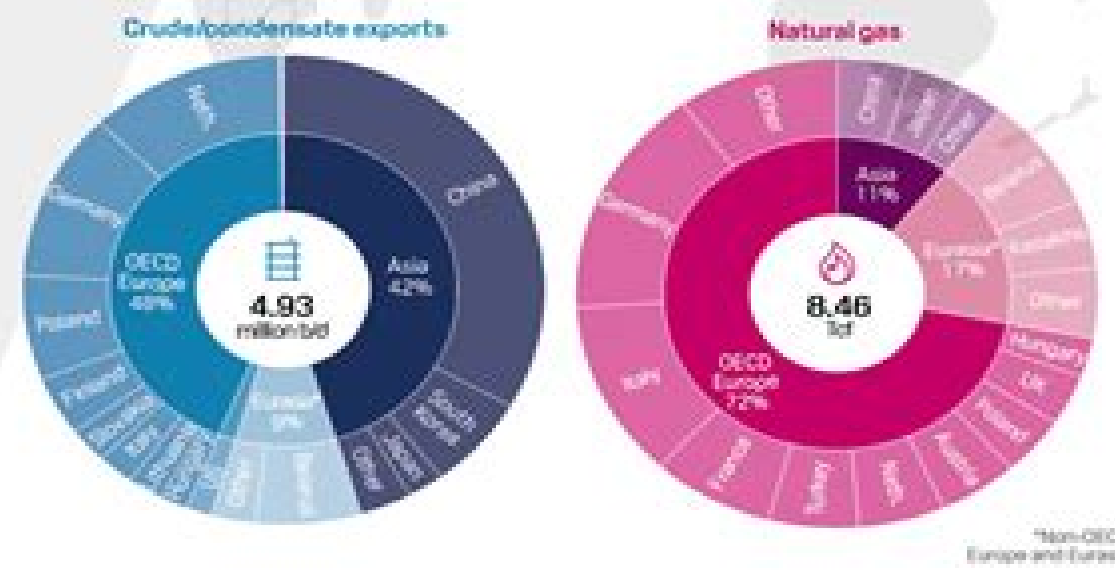
Conflict in Ukraine, following Russian troops launching attacks across international borders on Feb. 24, has already had a major impact on prices of key commodities from oil and gas through to steel and grains. Europe is heavily reliant on gas and Urals crude via the Drushba pipeline to refiners across the region. Ukraine is also considered Europe's bread basket and a major supplier of wheat amongst other key commodities shipped through its ports. S&P Global Platts Analytics has said its base case demand forecast continues to assume growth of 4.1 million b/d in 2023. However, under a limited incursion scenario in Ukraine, global demand growth could ease by 0.7 million b/d.



Russia's supply routes to Europe



Russia's key oil and gas buyers



The Global War For Oil

David Kirk



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Table of Contents The Global War For Oil

1. Understanding the eBook The Global War For Oil
 - The Rise of Digital Reading The Global War For Oil
 - Advantages of eBooks Over Traditional Books
2. Identifying The Global War For Oil
 - Exploring Different Genres
 - Considering Fiction vs. Non-Fiction
 - Determining Your Reading Goals
3. Choosing the Right eBook Platform
 - Popular eBook Platforms
 - Features to Look for in an The Global War For Oil
 - User-Friendly Interface
4. Exploring eBook Recommendations from The Global War For Oil
 - Personalized Recommendations
 - The Global War For Oil User Reviews and Ratings
 - The Global War For Oil and Bestseller Lists
5. Accessing The Global War For Oil Free and Paid eBooks
 - The Global War For Oil Public Domain eBooks

- The Global War For Oil eBook Subscription Services
- The Global War For Oil Budget-Friendly Options
- 6. Navigating The Global War For Oil eBook Formats
 - ePub, PDF, MOBI, and More
 - The Global War For Oil Compatibility with Devices
 - The Global War For Oil Enhanced eBook Features
- 7. Enhancing Your Reading Experience
 - Adjustable Fonts and Text Sizes of The Global War For Oil
 - Highlighting and Note-Taking The Global War For Oil
 - Interactive Elements The Global War For Oil
- 8. Staying Engaged with The Global War For Oil
 - Joining Online Reading Communities
 - Participating in Virtual Book Clubs
 - Following Authors and Publishers The Global War For Oil
- 9. Balancing eBooks and Physical Books The Global War For Oil
 - Benefits of a Digital Library
 - Creating a Diverse Reading Collection The Global War For Oil
- 10. Overcoming Reading Challenges
 - Dealing with Digital Eye Strain
 - Minimizing Distractions
 - Managing Screen Time
- 11. Cultivating a Reading Routine The Global War For Oil
 - Setting Reading Goals The Global War For Oil
 - Carving Out Dedicated Reading Time
- 12. Sourcing Reliable Information of The Global War For Oil
 - Fact-Checking eBook Content of The Global War For Oil
 - Distinguishing Credible Sources
- 13. Promoting Lifelong Learning
 - Utilizing eBooks for Skill Development
 - Exploring Educational eBooks

14. Embracing eBook Trends

- Integration of Multimedia Elements
- Interactive and Gamified eBooks

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