

Press Release

ENTSOG publishes its Summer Supply Outlook 2023 (with Winter 2023/24 overview) and Summer Supply Review 2022

(Brussels, 6 April, PR0288-23) **ENTSOG has today published its Summer Supply Outlook 2023 and the accompanying Review of Summer Supply 2022, as required by Art.8(3)(f) of Regulation (EC) 715/2009.**

Like the previous edition, the ENTSOG Summer Supply Outlook assesses injection levels and the possible evolution of demand, supply, and exports from 1 April to 30 September 2023, as well as the dependence of the EU on Russian supply to satisfy the gas demand and to inject in the European gas storages. In response to stakeholders' requests, this edition additionally includes an overview analysis for Winter 2023/24.

The assessment shows that, in the cases of minimised Russian gas imports and of a full Russian pipeline supply disruption:

- Reaching 90% storage filling level by end of summer is possible in both cases, enabled by efficient cooperation between the countries.
- Russian pipeline supply disruption would require additional measures to safeguard a 30% target storage level at the end of March 2024.
- Different winter demand situations were assessed. The most stressful case of a cold (once in 20 years) winter with a full Russian pipeline supply disruption would require additional supplies and demand reduction.
- The gas infrastructure, including new projects commissioned last year, can efficiently reduce the dependence on Russian supply due to enhanced cooperation.

Piotr Kuś, ENTSOG General Director, commented, *"In unprecedented times of energy crisis, new gas infrastructure projects commissioned in the past year have boosted energy security in the EU. In addition, storages play an essential role to ensure security of supply, providing seasonal flexibility needed during the winter season. The additional analysis undertaken by ENTSOG regarding the analysis for Winter 2023/24 provides even further transparency to energy market stakeholders."*

The Outlook assessment also shows that additional LNG supplies, above historically observed import levels, could allow higher targets to be reached for all storage facilities before the end of September 2023. Enhanced capacities, provided by TSOs, would contribute to the increase of import route capacities from the Caspian Area and Norway, as well as boost the possibility for the cooperation between Germany and Austria, Belgium, France, Czech Republic, and the Netherlands, resulting in the increase of gas supply flow from West to East.

It is important to note that these assessments are not forecasts of expected gas supply – gas supply is influenced by factors external to infrastructure readiness, such as policy and market decisions.

To complement the Supply Outlook report, ENTSOG also carried out a review of the previous summer. The review shows that:

- Total gas demand values dropped in the EU by 15.5% on average.
- Pipeline gas supplied by Russia dropped by around 50%, and LNG and National Production increased by 75% and 26% respectively.
- The storage level on 1 April was 27%, the lowest storage level of the last four summers.
- Russia's invasion of Ukraine and record temperatures had the most significant impact on the supply mix, gas prices and gas demand in Europe.

The Summer Supply Outlook 2023 and the Summer Supply Review 2022 reports are available [here](#).

Should you require any further information please contact Ms. Carmel Carey, ENTSOG.Communications@entsog.eu

Editorial notes

- > **The European Network of Transmission System Operators for Gas (ENTSOG)** was founded in line with Regulation (EC) 715/2009 and has played a key role in facilitating integration of the European gas markets, ensuring technical interoperability and providing security of supply by gas infrastructure planning. Looking forward, ENTSOG is contributing to the net-zero decarbonisation by 2050, in particular, by the integration of renewable and low carbon gases via future-proof gas transmission pipelines, in line with the EU energy and climate goals. More information on ENTSOG can be found on our website – www.entsog.eu or contact info@entsog.eu.