

Press Release

ENTSOG publishes its Summer Supply Outlook 2024 (with Winter 2024/25 overview) and Summer Supply Review 2023

(Brussels, 16 April, PR315-24) **ENTSOG has today published its Summer Supply Outlook 2024 and the accompanying Review of Summer Supply 2023, as required by Art.8(3)(f) of Regulation (EC) 715/2009. Like the previous edition, the Summer Supply Outlook report is supplemented with an overview of Winter 2024/25.**

The ENTSOG Summer Supply Outlook assesses injection levels and the possible evolution of demand, supply, and exports from 1 April to 30 September 2024. A number of supply scenarios were applied, including minimised Russian gas imports and a full Russian pipeline supply disruption, as well as cases for high, reference and low LNG supply potential. Furthermore, and for the first time, the potential additional seasonal flexibility provided by Ukrainian storages is included in the model.

The assessment shows that:

- On 1 April 2024, the EU gas stock level is in the higher range of the past 5 years at 59% or 663 TWh (667 TWh with UK), due to reduced gas consumption.
- New gas infrastructure projects have been commissioned in the past year, mainly LNG terminals, boosting energy security in the EU. However, under specific circumstances, some possible supply limitations and bottlenecks may occur.
- Additional storage flexibility could be secured by storing additional volumes in Ukrainian storage facilities.
- Most cases show the independence of the EU gas system from pipeline Russian supply, especially in scenario cases where some demand side actions are undertaken.

Piotr Kuś, ENTSOG General Director, commented, *‘We see that the gas infrastructure, including new projects commissioned last year, allows for efficient injection during the summer 2024 and preparation for winter due to enhanced cooperation. The assessment also clearly demonstrates the importance of storages, and that extra flexibility could be ensured by storing additional volumes in Ukrainian storage facilities.’*

This report additionally includes an overview analysis for Winter 2024/25. It shows that starting from a stock level of 59% on 1 April 2024, the injection and withdrawal capacities of

the gas storage facilities combined with the supply flexibility of imports is sufficient to cover the demand and reach this level at the end of the winter in all EU countries. In the case of a combined full disruption of Russian supplies and low LNG availability, storage facilities would be used at their maximum in some countries to meet demand and cannot reach this same inventory level by the end of winter, hindering the flexibility contribution usually provided by storage facilities during the high demand situations.

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 undertook a review of the previous summer. The review shows that:

- Total gas demand values dropped 3% year-on-year and by 15% compared to the 5-year average at the EU.
- Pipeline gas supplied by Russia in the supply mix decreased to 7%, down from 14% in the previous summer.
- On 1 October 2023, the EU gas storage facilities reached 96% on average.
- The LNG share increased to 37%, beneficial to also fill storages during injection period.
- The sum of all the import flows to Europe together with national production dropped by around 16%.

The Summer Supply Outlook 2024 & Summer Supply Review 2023 reports are available [here](#).

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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.