

Press Release

ENTSOG publishes its Summer Supply Outlook 2025 (with Winter 2025/26 overview) and Summer Supply Review 2024

(Brussels, 10 April, PR342-25) **ENTSOG has today published its Summer Supply Outlook 2025 and the accompanying Review of Summer Supply 2024, as required by Art.26(3)(g) of Regulation (EU) 2024/1789. Like the previous edition, the Summer Supply Outlook report is supplemented with an overview of Winter 2025/26.**

The ENTSOG Summer Supply Outlook assesses injection levels and the possible evolution of demand, supply, and exports from 1 April to 30 September 2025. 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, exports to Ukraine and Moldova are considered in the simulations.

The assessment shows that:

- On 1 April 2025, EU gas stock levels were at 34% (388 TWh/~ 35 bcm) which is lower compared to the previous two years, due to extensive use of storage facilities in Europe during previous winter.
- To replenish gas storage in preparation for the upcoming winter, Europe will require a higher volume of LNG compared to the previous summers, considering storage levels at the beginning of summer season 2025.
- It is essential to start gas storage replenishment as early as possible. Any unplanned maintenance could potentially put additional pressure on the refilling season.
- Existing European gas infrastructure and newly commissioned projects, including LNG terminals, are boosting import capacity and flexibility, enabling greater LNG inflows and more efficient cooperation among Member States, thereby strengthening energy security in the EU.

Piotr Kuś, ENTSOG General Director, commented, *‘This assessment again shows the importance of storage to ensure security of supply, providing the seasonal flexibility needed during the winter season. It is critical to start injecting gas as early as possible and monitor filling throughout the summer season and keep storage at an adequate level until the end of the winter. The continued supply of LNG is also essential, to avoid demand curtailment in certain situations.’*

This report additionally includes an overview analysis for Winter 2025/26. It shows that starting from a stock level of 34% on 1 April 2025, the injection and withdrawal capacities of the gas storage facilities combined with the supply flexibility of imports are sufficient to cover the demand and reach the inventory target level above 30% at the end of the winter in all EU countries.

Securing an adequate level of LNG supplies to Europe is necessary to either:

- Mitigate the risk of longer injection period or lower storage levels in summer 2025 in the event of a full disruption of Russian pipeline supplies, or
- Avoid a policy-based or price-based demand response to prevent full depletion of storages by the end of the 2025/26 winter season.

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 Summer 2024. The review shows that:

- Total gas demand values in Summer 2024 dropped 2.7% compared to Summer 2023 and by 17.9% compared to the 5-year average at the EU.
- Total supply to European countries showed a 6.4% decrease compared to 2023, due to lower gas consumption and high storage filling rate at the beginning of the injection period.
- The LNG share decreased to 29%, down from 37% in Summer 2023.
- The gas supply by pipelines was 53.5% in the total supply mix, with Norway being the biggest pipeline gas supplier.

The Summer Supply Outlook 2025 & Summer Supply Review 2024 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 ENTSG can be found on our website – www.entsog.eu or contact info@entsog.eu.

