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ENTSOG publishes its Winter Supply Outlook 2025/26 (with Summer 2026 Overview) and Winter Supply Review 2024/25

(Brussels, 9 October, PR0352-25) **ENTSOG has today published its Winter Supply Outlook 2025/26 and Winter Supply Review 2024/25 reports, as required by Article 26(3)(g) of Regulation (EU) 2024/1789. The Winter Supply Outlook also includes a Union-wide simulation of prolonged Russian gas supply disruption scenarios.**

The report comprises a Union-wide simulation of gas supply and infrastructure disruption scenarios, including a wide variety of sensitivities not only for this winter assessment (1 October 2025 to 31 March 2026) but also for the longer-term preparedness. As for previous editions, it additionally includes an analysis for Summer 2026 (1 April 2026 to 30 September 2026).

ENTSOG has assessed the capability of the European gas system to cope with normal or cold winter conditions, and high demand situations. In this edition, the analysis considers disruption of the largest offshore infrastructure to continental EU, and disruption of all imports from Algeria in a scenario with no supply of pipeline gas from Russia.

Main findings:

- The EU storage level (**83% or 943 TWh on 1 October 2025**) is 10% lower than the level at the same time last year. It was shown that 31% of the supply during the previous winter season 2024/25 was delivered from storage.
- **LNG supply and supply from Norway** represent the largest sources of supply for the EU Member States and the Energy Communities' Contracting parties. With **sufficient LNG availability**, the European gas network **can meet demand while maintaining more than 30% of storage level** by the end of the winter season.
- By keeping **storage at appropriate levels and avoiding early significant withdrawals**, the **gas system can remain flexible and resilient**, ensuring reliable supply especially during high demand events.
- In case of a **full disruption of Russian pipeline supplies**, Europe's **gas infrastructure remains reliable and maintains storage levels at 30%**, although results indicate that gas **storage may need to be utilised more extensively**.
- Simulations of **high-demand events under extreme conditions** (such as a Cold Winter, low initial storage, and supply disruptions) **highlight potential west-to-east bottlenecks** limiting gas deliveries to Eastern Europe**.**

- Disruption of the **largest offshore infrastructure to continental EU** or **all imports from Algeria**, especially in cold winter or under high demand events, would require a combination of **additional supply, demand side response and Member State cooperation** to avoid the risk of demand curtailment.
- In case of **full disruption of Russian pipeline supplies during a cold winter combined with much lower LNG supply**, simulation results showed that the introduction of possible measures, such as **additional supplies,** and **demand response** (either policy based or price-based), would avoid demand curtailment risks and **allow for reaching adequate storage level**.
- In case of Russian pipeline supply disruption, cooperation between the countries and demand measures could allow for a **more efficient injection during the summer 2026 in preparation for the next winter.** The **infrastructure also allows for increased LNG supply** to Europe to compensate for the reduction in Russian pipeline gas.
- Additional storage flexibility could be secured by **storing additional volumes in Ukrainian storage facilities**, if this gas could be injected and then withdrawn during the winter season, and if market participants would be willing to use it. **Potential transit of gas through Ukraine between Member States could improve interconnectivity between CEE and SEE regions**.

Piotr Kuś, ENTSOG General Director, said, *"Our analysis indicates the importance of securing adequate supplies of LNG to Europe. Most scenarios where sufficient volumes of LNG are available, with efficient use of imports and transit, and new LNG terminals being used, demonstrate an independence on Russian gas supply. European gas infrastructure, including new projects commissioned, enables meeting demand and maintaining more than 30% UGS stock levels in all storage facilities by end of the 2025/26 winter season.''*

To complement the Supply Outlook report, ENTSOG also carried out a review of the previous winter to increase knowledge of seasonal dynamics of supply and demand. The Winter Supply Outlook 2025/26 (with Summer 2026 Overview) and the Winter Supply Review 2024/25 reports are available on the ENTSOG website, here.

ENTSOG will monitor the evolution of the storage levels throughout the winter and report on the situation on a regular basis.

Should you require any further information please contact Ms. Carmel Carey, External Communication Manager (ENTSOG.Communications@entsog.eu).

Editorial notes

> **The European Network of Transmission System Operators for Gas (ENTSOG)** was founded in line with 2009 playing a key role in facilitating integration of European gas markets, ensuring technical interoperability and providing security of supply by gas infrastructure planning. Within the scope of Regulation (EU) 2024/1789 and other relevant legislation, ENTSOG is contributing to net-zero decarbonisation by 2050 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 – or contact info@entsog.eu.