Press Release
PR0366-26
9 April 2026

Press Release

ENTSOG publishes its Summer Supply Outlook 2026 (with Winter 2026/27 overview) and Summer Supply Review 2025

(Brussels, 9 April, PR366-26) **ENTSOG has today published its Summer Supply Outlook 2026 and the accompanying Review of Summer Supply 2025, as required by Art.26(3)(g) of Regulation (EU) 2024/1789. Like the previous editions, the Summer Supply Outlook report is supplemented with an overview of Winter 2026/27.**

The ENTSOG Summer Supply Outlook assesses injection levels and the possible evolution of demand, supply, and exports from 1 April to 30 September 2026. The analysis evaluates the role of LNG in Europe under different availability scenarios. In addition to LNG Optimal scenario grounded in historical data, sensitivity analyses also consider lower LNG availability under LNG Tight scenario. The assessment reflects the continuation of existing long-term contracts for Russian pipeline gas, with flows limited to the TurkStream route. ENTSOG has also assessed the EU's dependence on Russian supply during the summer 2026 and winter 2026/27 seasons.

The assessment shows that:

- On 1 April 2026, EU gas stock levels were at 28% (314 TWh/~ 29 bcm), lower than the three previous years and at the same level as pre-energy crisis level.
- To replenish gas storage in preparation for the upcoming winter, Europe would require higher LNG imports than previously observed, alongside increased utilisation of gas infrastructure. The escalating conflict in the Persian Gulf is tightening global LNG availability and constraining the ability to refill storages.
- Initiating the injection season as early as April and extending it until November would provide greater flexibility to fill storages ahead of the next winter season.
- Securing LNG supplies, coordinating maintenance schedules, and maintaining operational flexibility in storage and import capacity are essential to avoid risk of insufficient storage levels and support system flexibility.
- Overall, the system remains sufficiently flexible, with European LNG regasification capacity of approximately 1,600 TWh per winter season/~145 bcm, which can partially compensate for lower storage levels at the beginning of the withdrawal season and support meeting winter demand if LNG would be delivered at adequate level.

Piotr Kuś, ENTSOG General Director, commented, '*Europe enters the summer injection season from a much lower storage level than in recent years, at a time when global energy markets and supply are under pressure. It is critical to start injecting gas as early as possible, even as*

early as April, and continue filling until November, to ensure adequate levels for the winter ahead. The continued supply of LNG is also essential, to avoid demand curtailment in certain situations.'

This report additionally includes an overview analysis for Winter 2026/27. It shows that starting from a stock level of 28% on 1 April 2026, the injection and withdrawal capacities of the gas storage facilities are sufficient to cover the demand and reach the inventory target level above 30% at the end of the winter in all EU countries, assuming that adequate gas supplies are ensured. Stress tests with limited LNG availability underscore the critical importance of securing adequate supplies. Maintaining sufficient storage level at the beginning of withdrawal season, coupled with policy- or price-based demand response could mitigate risks during the winter period.

It should be noted that these assessments are not expected gas supply forecasts - 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 2025. The review shows that:

- The Summer 2025 starting and ending storage levels were 34% and 83%, respectively, compared to 59% and 94% in Summer 2024. Storage levels remained below the 90% target, reaching a seasonal peak of 83% on 12 October 2025.
- Total supply to European countries showed a 5.6% increase compared to 2024, mainly driven by lower starting storage levels requiring more refilling, supported by higher LNG imports and improved global supply availability.
- The share of LNG supply increased from 29.2% in Summer 2024 to 37.8% in 2025. The gas supply by pipelines in the total supply mix, was 45.3% in 2025 with Norway remaining the biggest pipeline gas supplier.

The Summer Supply Outlook 2026 & Summer Supply Review 2025 reports are available here.
For further information please contact Alix SWAELS, ENTSOG.Communications@entsog.eu

Editorial notes

> **The European Network of Transmission System Operators for Gas (ENTSOG)** was founded in 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. Within the scope of Regulation (EU) 2024/1789 and other relevant legislation, ENTSOG is contributing to the 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 – **www.entsog.eu** or contact **info@entsog.eu.**