

Gas Winter Outlook October 2026





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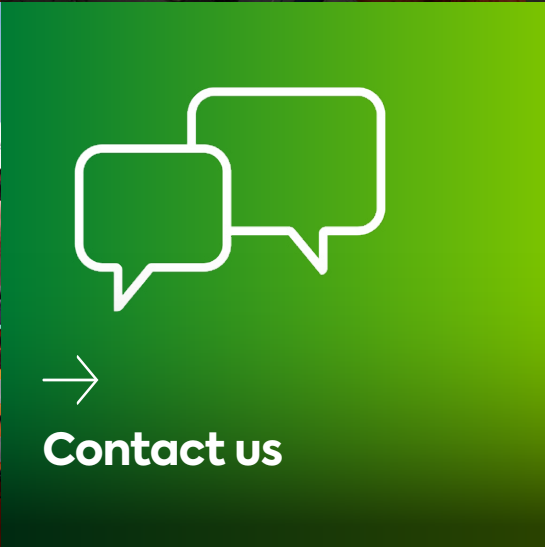
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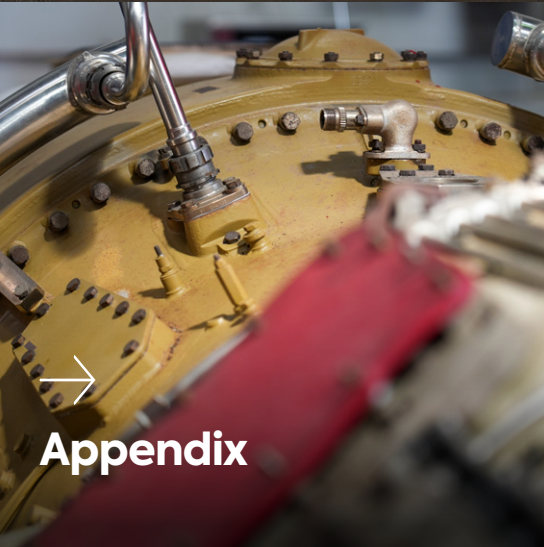
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How to use this document

We have published the Gas Winter Outlook 2026 as an interactive document.



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'Linked' content

Words in green and underlined have links to other pages in this document, or are URLs.

Welcome to this year's Gas Winter Outlook

This Winter Outlook sets out National Gas' forecast of gas supply and demand for winter 2026/27.

As Britain's Gas System Operator, we transport gas safely, securely and reliably across the country. We also provide independent analysis and forecasts to help Government, regulators and industry make informed policy and commercial decisions.

Britain's gas supply has been secured through long and well-established market arrangements, underpinned by commercial incentives and supported by policy and regulatory frameworks.

This is important context because the structural changes driving Britain's energy transition, reshaping both gas demand and supply patterns, are creating new considerations for a system that has delivered secure and resilient supplies for decades.

As Britain continues its energy transition, the role of gas, and the gas system itself, is changing.

While overall gas demand is forecast to decrease over time, peak demand is expected to remain broadly unchanged over the next decade and beyond. Gas continues to play an important role in providing flexible electricity generation when renewable output is low, while also heating 24 million homes across Britain during periods of cold weather.

Our analysis also shows increasing volatility in gas demand for electricity as intermittent renewable generation increases. As electrification continues, periods of low renewable output will continue to require flexible generation, underlining the role gas will play in supporting energy security.

As domestic gas production has declined over the past 25 years, Britain is becoming more reliant on a diverse range of imports and storage to meet demand, a trend expected to continue through the next decade.

While supply diversity and flexibility remain sources of resilience, taken together these trends in demand and supply have resulted in tighter supply margins during periods of high demand and system stress.

These challenges, and the factors that underpin them, are not new.

Our Winter Outlook 2025 highlighted the potential for tightening margins in future years, and NESO's Gas Supply Security Assessment pointed to more acute challenges emerging by 2030.

This is why the Government's Gas System in Transition: Security of Supply consultation and interim response are a welcome step towards safeguarding Britain's future energy security in the medium and long term.

In its interim response, informed by industry input, the Government acknowledges the challenges that an evolving demand and supply landscape presents for existing market arrangements in maintaining security of supply under certain high-stress scenarios. This is an important step forward, but we look forward to a full Government response as soon as possible.

As National Gas noted in our response published in February and last year's Winter Outlook, it is also important that previously identified near-term risks continue to be addressed swiftly and in a coordinated way.

Over the last year, National Gas has worked with NESO, Government, Ofgem and industry to better understand these risks and consider options to address them.

As set out in our statement and reflected in Ofgem's statutory consultation published on 22 October 2026, National Gas has facilitated arrangements to maintain import capability through Interconnector Limited. Subject to regulatory approval, that capability is expected to be available this winter and has had a positive impact on our assessment.

Against this backdrop, our analysis indicates that Britain is expected to have sufficient gas capability to meet demand throughout winter 2026/27, including under these unlikely, high-stress scenarios.

This is a positive outcome, supported by the action taken, alongside the diversity of our supply landscape and the resilience of our infrastructure.

However, continuing changes in demand and supply patterns underscore the need for further coordinated action to maintain Britain’s security of supply in the future.

Any outlook represents an assessment based on the information available at a particular point in time. Weather conditions, global energy markets and geopolitical developments can all influence gas supply and demand over the winter. That is why we continuously monitor the system and work closely with industry partners to prepare for a range of scenarios.

No single organisation holds all the levers. But by continuing to work together and planning ahead, Britain can maintain a secure and resilient energy system on which homes, businesses and electricity generation continue to depend.

As Britain’s Gas System Operator, National Gas remains committed to playing its part by providing the analysis, expertise and long-term perspective needed to support informed decisions and help safeguard Britain’s future energy security.



About US

Other publications in this suite:

- [Gas Summer Outlook](#)
published annually in April.
- [Gas Winter Review](#)
published annually in June.
- [Gas Ten Year Statement \(GTYS\)](#)
published annually in December.

National Gas is the owner and operator of Great Britain’s National Transmission System (NTS) – a critical part of the country’s energy infrastructure.

We are responsible for transporting gas safely, efficiently and reliably across nearly 5,000 miles of pipeline, supplying power stations, major industries, storage facilities, over 500,000 businesses and 24 million homes.

Operating under our licence, established by the Gas Act 1986, we develop, maintain and operate an economic and efficient network while facilitating competition in the gas market.

As the NTS owner and operator, our primary responsibility is the day-to-day operation of the network – ensuring system integrity, maintaining safe pressures and gas quality, and balancing supply and demand on the system in real time. We play three key roles within this framework.

As an infrastructure provider, we operate and maintain the network so it can respond to changing demand and supply patterns.

As a market facilitator, we provide data, forecasts and transparency to support industry planning and enable the market to balance itself.

And as the residual balancer, we take operational actions – including trading on the On-the-Day Commodity Market – to maintain physical system balance where needed.

Importantly, the availability of gas itself is determined by market participants. National Gas does not procure or control upstream gas supplies, including production, imports, storage levels or commercial supply decisions. Instead, gas shippers are responsible for securing sufficient supply to meet demand, supported by market incentives and regulatory frameworks.

Our role is to ensure the system can safely transport that gas and to manage system balance within defined operational limits. In challenging scenarios, we have established tools to protect system integrity and safety, including acting under Gas Supply Emergency procedures when authorised.

Alongside our operational responsibilities, we work closely with government, Ofgem, the National Energy System Operator (NESO) and industry partners to identify and manage risks to the system, support coordinated action on security of supply, and plan for future network needs. We are also developing our infrastructure to enable hydrogen and carbon dioxide transport, supporting Britain’s clean energy transition while maintaining a secure and resilient gas network.



Executive summary



Executive summary



1 Our GB demand forecast (excluding exports to continental Europe & Ireland) and total NTS demand (including exports) for the coming winter are forecast to be comparable with the previous winter. We expect energy-saving behaviour to remain in place for the domestic sector due to the ongoing high prices.

2 Our analysis shows that Great Britain has sufficient supply capability to meet peak demand and a positive supply margin under both intact and N-1 network conditions is maintained for the coming winter.

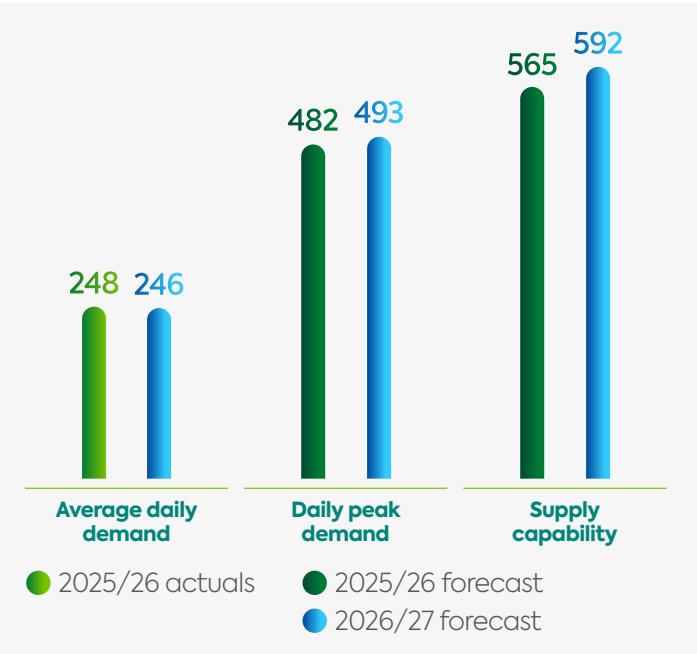
3 We have stress tested high demands, infrastructure loss and a number of other sensitivities and illustrated how the NTS could be balanced under a range of credible demand and supply profiles. UK Continental Shelf (UKCS) and Norway provide baseload supplies with the level of liquefied natural gas (LNG) required driven by the overall level of demand. In cold winter scenarios, GB will likely also require imports from continental Europe.

4 Disruptions to other markets (such as the conflict in the Middle East) could impact the GB market. GB is connected physically to Europe via interconnectors and to the wider global market by LNG. Whilst we have confidence that the market will perform as expected, we shouldn't discount the risk of events occurring, which could put GB under stress.

5 We have the necessary physical, commercial and market-based tools to manage a supply and demand imbalance, including those related to a Network Gas Supply Emergency (NGSE), in the unlikely event it should be necessary.

6 All key partners across networks, industry, government and regulators recognise that GB's gas supply landscape is changing with the ongoing decline in supplies from the UKCS. It is important to be proactive in meeting these challenges together and we are already working in close collaboration to develop the solutions to ensure GB continues to have secure, reliable and diverse supplies.

Key winter statistics (mcm/d)





Winter demand & supply

Demand forecast

Supply range/forecast



Demand forecast

Our GB demand forecast (excluding exports to continental Europe and Ireland) and total NTS demand (including exports to continental Europe and Ireland) for the coming winter are forecast to be comparable with the previous winter.

Actual demand levels are inherently uncertain due to the significant influence of changing factors such as the weather, cost of energy and geopolitical developments can have on energy requirements.

Below are the key factors that have influenced our forecast for this winter:

- **Non-daily metered (NDM)** – forecast demand is very similar to the previous winter. The forecast prices for the winter are expected to be higher than in previous years. As a result we do not expect any demand recovery this winter, with consumers expected to continue with many of the energy saving techniques implemented during the energy crisis in 2022.
- **Daily metered (DM) and Industrial** – forecast demand is consistent with previous winters. Historical data and our market intelligence do not indicate any major drivers of change across these categories.
- **NTS gas demand for electricity generation** – the forecast for the coming winter aligns with the ongoing year-on-year decline, driven by continued growth of renewable energy sources. Compared to winter 2025/26, demand is expected to be 5% lower.

However, actual demand may vary depending on weather conditions and the availability of renewable generation, as well as other generation sources, such as nuclear power. Whilst the total winter demand is forecast to reduce, we expect the daily peaks to remain. Read more about this in our [spotlight](#). You can read more about the electricity market expectations in NESO’s [Winter Outlook](#).

- **Ireland** – the forecast is based on GNI’s preliminary view and is comparable to the previous winter. The final GNI winter forecast can be found in their [Winter Outlook](#).
- **Exports to continental Europe** – are forecast to be comparable to the previous winter. The primary driver for exports is the demand to refill EU storage at the start of winter.
- **GB storage injection** – our forecast is based on the five-year average and is comparable to the previous winter.

Notes:

- Due to impacts of rounding % may not match.
- Actual demand is just that and does not include an adjustment for weather.
- Weather correction applied to NDM, DM and Exports to Ireland.
- Forecast demand is weather corrected.
- Total demand also includes shrinkage.

Figure 1
Forecast gas demand for winter 2026/27

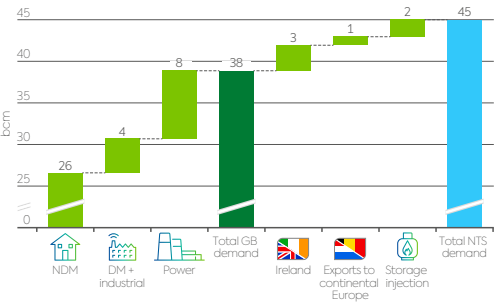


Table 1
Forecast gas demand for winter 2026/27 and actual and weather corrected demand for 2025/26

bcm (including shrinkage)	2025/26 actual demand	2025/26 weather corrected demand	2026/27 forecast	% change
Non-daily metered (NDM)	25.7	26.3	26.4	0% ↔
Daily metered (DM) and Industrial	3.7	3.7	3.7	0% ↔
Gas demand for electricity generation	8.0	8.0	7.6	-5% ↓
Great Britain’s gas demand	37.4	38.0	37.7	-1% ↓
Exports to Ireland	3.3	3.3	3.3	0% ↔
Exports to continental Europe	1.4	1.4	1.4	-5% ↓
GB storage injection	2.1	2.1	2.1	1% ↑
Total NTS gas demand	44.5	45.2	44.8	-1% ↓

Supply range/forecast

Great Britain benefits from having diverse supply sources, which include the UKCS and Norway, coupled with flexible supplies from LNG, imports from continental Europe and GB storage.

Table 2 shows the actuals for last winter (2025/26), along with our forecast for winter 2026/27.

UKCS – is expected to continue to deliver baseload supplies to GB. Production levels have been steadily declining over recent years, and we expect that to continue this winter. [Read more in our UKCS spotlight.](#)

Biomethane – biomethane has now been included in our supply forecast. Our demand forecasts represent total demand, not just the demand observed on the NTS. Therefore we have included the biomethane supply, most of which is embedded in the Gas Distribution Networks (GDNs).

Norway – for the coming winter, similar levels of supply when compared to winter 2025/26 are expected. We anticipate overall production levels to remain stable, and with market indicators aligning closely with last year, we expect the distribution of Norwegian exports between Great Britain and continental Europe to stay largely unchanged.

LNG – supplies for the coming winter are forecast to be slightly higher than the previous winter. This is largely to offset the reduction in the UKCS production decline. Disruptions to the global LNG market due to the conflict in the Middle East are expected to persist into the winter, which could increase competition between different markets, impacting the cost of LNG. Raised wholesale gas prices during periods of increased winter demand are expected to attract cargoes to the UK, enabling LNG to remain a key source of supply flexibility throughout the winter. [Read more about this in our LNG spotlight.](#)

Storage – our forecast is based on the five year average and is comparable to the previous winter.

Imports from continental Europe – our forecast is in line with the previous winter (and comparable to previous years). Given that imports are market driven, we would expect to see higher levels of imports during cold weather when demand is high. [Read more about this in our EU spotlight.](#)

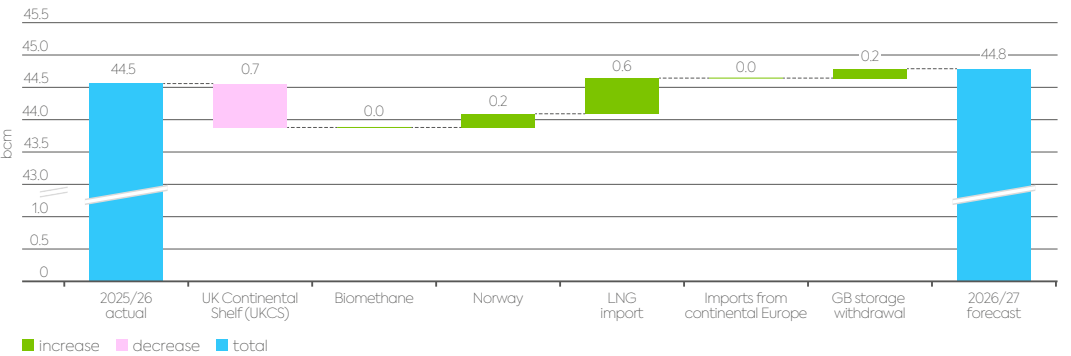
Due to the offshore configuration at St Fergus, we are unable to measure UKCS and Norwegian supplies separately as they enter our system at the same point. Therefore, the individual contribution of these supplies is partially based on our estimates of the split at St Fergus.

Totals and percentages may not match due to rounding.

Table 2
Historic & forecast winter supplies

Winter (bcm)	2025/26 actual	2026/2027 forecast	% change	
UK Continental Shelf	14.9	14.2	-5%	↓
Biomethane	0.3	0.3	9%	↑
Norway	15.3	15.5	1%	↑
LNG import	11.7	12.3	5%	↑
Imports from continental Europe	0.1	0.1	0%	↔
GB storage withdrawal	2.2	2.3	7%	↑
Total	44.5	44.8	1%	↑

Figure 2
Forecast supplies for winter 2026/27





Peak day demand, supply & supply margins

- Peak demand
- Supply capability
- Supply margins



Peak demand

The forecast 1-in-20 peak demand, which is the highest level of gas demand that GB should expect to experience only once in every 20 years, for winter 2026/27 is 493 mcm/d, which is higher than forecast for the previous four winters.

NDM – we anticipate a small increase in demand on a peak day, equivalent to 1%. This is due to updated Composite Weather Variables (CWVs) being applied, which are reviewed every 5 years to ensure they reflect consumer behaviours and observed energy usage patterns. While the higher prices are expected to suppress NDM demand over the winter period as a whole, we do not expect this to have the same impact on a peak day. This is based on observations of consumer behaviours during previous winters.

DM & Industrial – this is a relatively small component of demand and minimal change is anticipated (– 1 mcm/d), annual trends show that these types of demand are consistent.

Power – our forecast for gas demand for power on a peak 1-in-20 day has increased by 7 mcm/d (7%). In each of the last four winters we have observed gas demand for power generation above 100 mcm, and the forecast has been updated to reflect this trend. This does not reflect the highest power demand that could occur over the winter, but a forecast of the power demand under 1-in-20 conditions.

Ireland – the peak remains the same as the previous year and is reflective of the Gas Networks Ireland (GNI) forecast.

Figure 3
Peak 1-in-20 demand forecast for 2025/26 and 2026/27

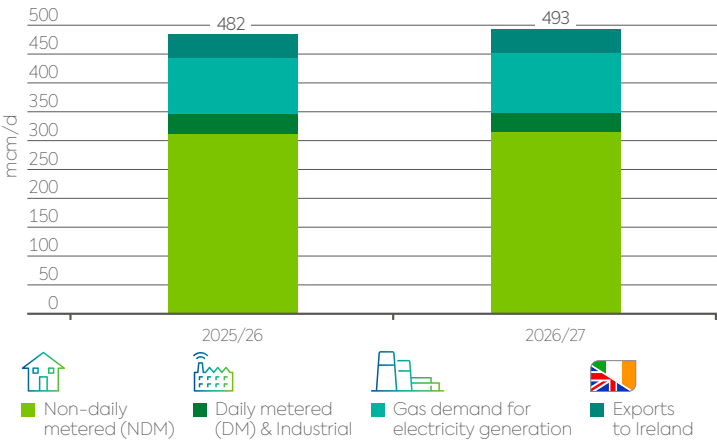


Table 3
Peak 1-in-20 demand forecast for 2025/26 and 2026/27

mcm/d	2025/26	2026/27	% change	
Non-daily metered (NDM)	311	315	1%	↑
Daily metered (DM) and Industrial	33	32	–4%	↓
Gas demand for electricity generation	98	105	7%	↑
Exports to Ireland	39	39	1%	↑
Total demand	482	493	2%	↑

Supply capability

Great Britain benefits from having diverse and flexible supplies. The maximum supply capability for each supply type has been refreshed to reflect market intelligence, technical capacities and observed flows (table 4). Full details can be found below.

UKCS – last winter, production reached a peak of 91 mcm/d, which was higher than the peak level forecast in the previous Gas Winter Outlook (85 mcm/d). For this winter, we forecast a maximum production rate of 86 mcm/d. Although this is 6% below last winter’s actual peak production, it is 1 mcm/d higher than the peak level assumed in last year’s forecast.
[Read more in our UKCS spotlight.](#)

Biomethane – biomethane has now been included in our supply capability assessment. Our demand forecasts represent total demand, not just the demand observed on the NTS, therefore we have included the biomethane supply, most of which is embedded in the Gas Distribution Networks (GDNs).

Norway – our assessment reflects that there is likely to be a reduction of around 1 mcm to reflect declining flows through the FLAGS infrastructure into St Fergus.

LNG – both South Hook and Isle of Grain completed expansion projects last winter, increasing LNG import capability beyond previous baseline levels.

Following an assessment of network capability under 1-in-20 peak demand conditions, the maximum level of LNG imports that can be accommodated has increased to 174 mcm/d.

Despite these terminal expansions, our overall LNG capacity obligation remains unchanged at 150 mcm/d, as the network would be unable to accommodate the higher import rates during periods of lower demand.

Imports from continental Europe – the supply maximum is the same as the previous winter. This is reflective of the [announcement from Interconnector](#) that they will remain at their current capacity of 61 mcm/d. BBL’s capacity remains at 22 mcm/d, meaning that total supply capability for imports from continental Europe is 83 mcm/d.

GB storage – storage deliverability is based on the submissions from the operators to our data portal and our regular liaison with storage operators, along with actual flows observed over recent winters. Based on this data, our maximum supply capability has increased by 1 mcm/d compared to last winter.

Our GB storage withdrawal maximum supply capability does not include Rough, given that there have been no injections over summer.

Figure 4
Supply capability forecast for 2026/27

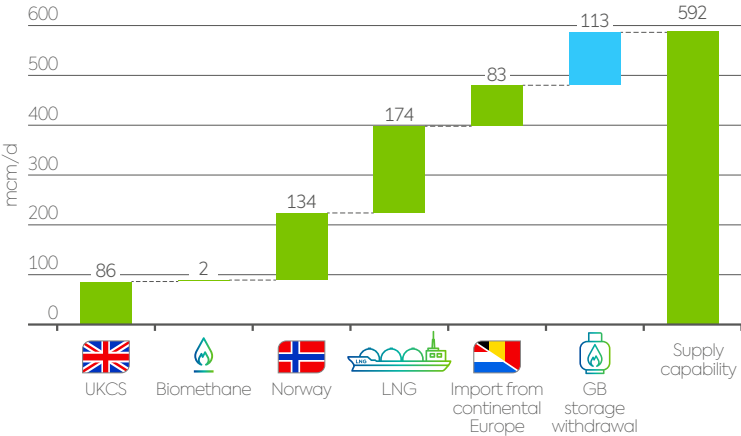


Table 4
Supply capability forecast for 2025/26 and 2026/27

mcm/d	2025/26	2026/27	% change	
UKCS	85	86	1%	↑
Biomethane	-	2	-	-
Norway	135	134	-1%	↓
LNG	150	174	16%	↑
Import from continental Europe	83	83	0%	↔
GB storage withdrawal	112	113	1%	↑
Total	565	592	5%	↑

Supply margins

Great Britain maintains a positive supply margin under both intact and N-1 network conditions for the coming winter.

The peak demand for winter 2026/27 is 493 mcm/d which, as described earlier, is higher than last winter (482 mcm/d).

Peak day supply is 592 mcm/d compared to 565 mcm/d the previous year. All supply capabilities have been refreshed to reflect market intelligence, commercial capacities and observed flows (as described on the previous page).

The supply margin between forecast peak supply and 1-in-20 demand for winter 2026/27 is 99 mcm/d, which is higher than last winter (83 mcm/d). This increase is largely driven by the increased supply capability from LNG.

Under N-1 conditions we test the event of losing the single largest piece of NTS infrastructure, which is 81 mcm/d. The supply margin under these N-1 conditions for winter 2026/27 is 18 mcm/d.

It's important to note that the N-1 margin relies on two very unlikely events happening simultaneously, a peak 1-in-20 demand and an infrastructure loss. We stress test this and other sensitivities in our [scenarios](#).

We have several tools available to remedy system imbalances at both a locational and national level. Such tools could include scaling back capacity, undertaking commercial balancing actions, and activating Operating Margins (OM) contracts. For winter 2026/27, we have booked a total volume of 92 mcm (1,010 GWh) of OM, with a maximum deliverability of 49 mcm/d (536 GWh/d) as detailed in our [OM Statement](#).

A more extreme, prolonged supply interruption could result in an NGSE, and we have the appropriate tools in place to manage this in the unlikely event of it occurring. Such tools include (but are not limited to) accepting non spec gas, issuing public appeals to the market to increase supply, enforcing commercial contracts with large customers to reduce demand and/or with storage operators to maximise withdrawals. For further information on the tools available to us, please see our [System Management Principles Statement \(SMPS\)](#).

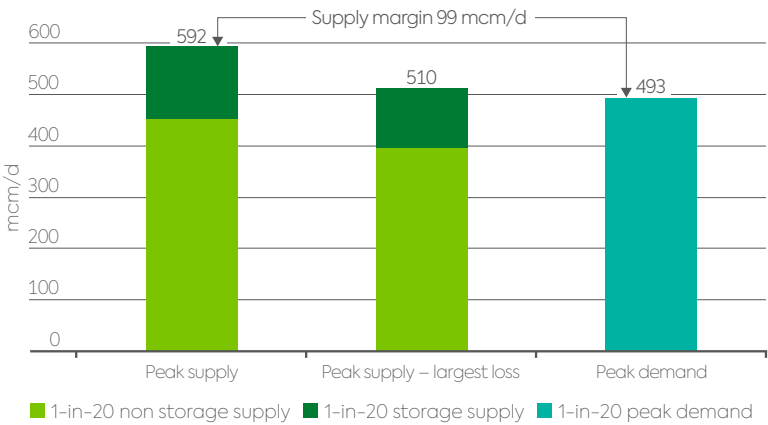
To read more about the margins assessments for the Gas Winter Outlook and the NESO Gas Security of Supply Assessment (GSSA), please see the [glossary](#).

Table 5
Peak day supply margins for 2025/26 and 2026/27

mcm/d	2025/26	2026/27
1-in-20 peak demand	482	493
1-in-20 non storage supply	453	478
1-in-20 storage supply	112	113
1-in-20 total supply	565	592
1-in-20 margin	83	99
N-1 supply loss	72	81
N-1 margin	11	18

Totals may not fully add up due to rounding. Refer to the data workbook for the core data.

Figure 5
Peak day supply margins for 2026/27





Spotlights

- GB storage
- Gas demand for electricity generation
- UKCS
- LNG
- EU





Great Britain (GB) storage

Spotlight

GB has a diverse and highly flexible gas storage market. This flexibility is largely attributed to the substantial indigenous production from the UK Continental Shelf (UKCS), which has shaped the development of predominantly Medium Range (MRS) storage facilities. In contrast, many European countries rely more heavily on long range seasonal storage (LRS).

GB storage stocks ahead of winter 2026/27
GB storage stocks ahead of winter 2026/27 are comparable to the previous year. GB storage reacts to short-term price signals and therefore stock levels often change quite quickly and the level can change from week to week. This is unlike EU storage which has typical refill summer and withdrawal winter based on seasonal price signals.

GB storage fullness ahead of cold snaps
In our Gas Winter Outlook 2025, we explained how GB gas storage operates and assessed storage levels ahead of cold snaps. Our analysis (figure 7) showed that, on average, GB storage was 81% full on the day before a cold snap, with levels ranging from 63% to 95%.

Ahead of the most recent cold snap on 5 January 2026, GB storage was 72% full, consistent with the findings presented in our Gas Winter Outlook 2025. This provides the basis for the stock assumptions used in our cold snap scenario, which are set towards the lower end of the historical range at 65%.

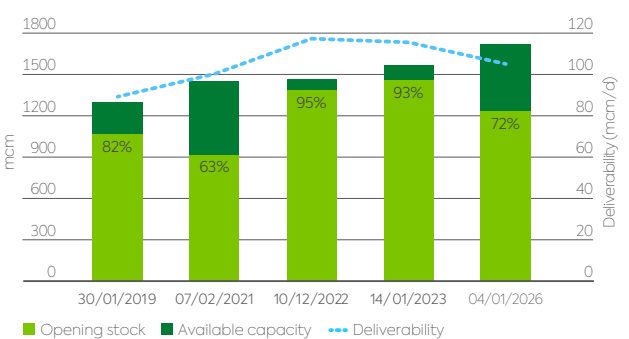
Given the operational characteristics of GB storage facilities, these stock levels have continued to support a high level of deliverability during periods of high demand. Across the previous four cold snaps, storage sites provided more than 100 mcm/d of deliverability. Last winter, storage sites reported deliverability above 100 mcm/d on more than 95% of winter days.

To allow comparison between years we have based the stocks on MRS sites only, which excludes Rough.

Figure 6
GB MRS storage stocks for gas years 2024/25 & 2025/26



Figure 7
GB MRS storage stock/space/fullness ahead of recent cold snaps



Gas demand for electricity generation

Spotlight

Overall winter 2026/27 gas demand for electricity generation is forecast to be lower than previous years, as a result of increased renewable generation.

However, our peak forecast has increased and we still expect periods of very high daily demand this winter, alongside significant within-day demand changes. This reflects the increasingly flexible role of gas generation, as it shifts from providing consistent volume to delivering value at times of system need.

Table 6 shows the highest gas demand for electricity generation in each of the last three winters, along with the half hourly (HH) peak and the % of electricity generated from gas during that half hour. The highest half hour peak on those days is 27.9 GW which represented 67% of electricity being generated from gas.

In figures 8 and 9, we have looked to show how both electricity generated by gas and the gas demand for electricity generation changed around our peak day in the last three winters. On both charts, “D” represents the highest day for gas demand for electricity in that winter, along with the three days before and after.

Figure 8 shows the half hourly electricity generation by gas around our peak day for the last three winters. While the maximum generation in each year is quite similar, the patterns both before and after this are quite different. Last winter, the electricity generated by gas remained low for the first two days before ramping up rapidly before the peak day. In contrast, in winters 2023/24, the generation increased sharply at the start of the period and stayed at quite high levels for several days.

Figure 9 shows the daily gas demand for electricity generation over the same periods. This shows the impact on the gas demand of the patterns highlighted above. Last winter, the daily gas demand was at only around 20 mcm/d for the first two days of the period before increasing to over 100 mcm/d over the next two days, then remaining high for the rest of the period. In winters 2023/24 and 2024/25, the gas demand for electricity generation starts the period at a higher level and is over 100 mcm/d for two consecutive days.

These profiles show how the gas network responds to variable electricity needs, with gas-fired power stations providing the flexibility to balance the system when renewable generation is low, whether over prolonged periods or during short-term changes.

Table 6
Peak half hourly electricity generation by gas and peak daily gas demand for power

Date	mcm	Peak GW – time	HH peak – GW	% of electricity generated from gas
01/12/2023	103	18:00	26.5	58.8%
12/12/2024	107	08:00	27.9	67.1%
05/01/2026	103	09:00	26.1	53.6%

Figure 8
Peak electricity generation by gas winter 2023/24 to winter 2025/26

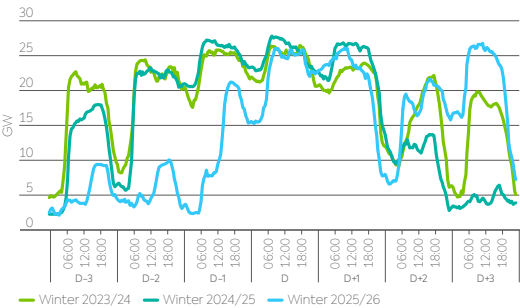
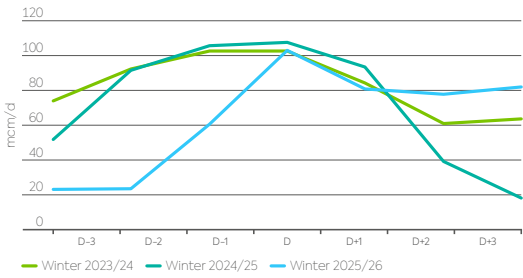


Figure 9
Peak gas demand for power winter 2023/24 to winter 2025/26



United Kingdom Continental Shelf (UKCS)

 Spotlight

UKCS remains a significant contributor to GB gas supply, providing stable supplies throughout the winter and accounting for around a third of total supply.

Our UKCS forecast is based on a number of factors. We assess annual production, both actuals and forecasts, from our own data and NSTA along with third party data providers. This helps us understand the production rates and forecast output from a range of sources.

However, most of this data is on an annual basis and not focused on the winter or for a maximum capability. Additionally, we are looking to understand the flows on the NTS so it is important to consider the flows we see on our network. To do this, we look at the flows at our entry points, and remove the flows GASSCO indicate are linked to Norwegian infrastructure. This method will exclude production from some UKCS fields which are connected to Norwegian infrastructure and include some Norwegian fields connected to GB infrastructure.

Our winter forecast suggests UKCS production will decline by approximately 5% compared with last winter, in line with recent trends and other industry forecasts. Although output from mature fields continues to decline, new production from Penguins,

Victory and Affleck is expected to partially offset these reductions, as would Jackdaw should it be consented.

Our maximum capability has a decline of 6% from the maximum observed for last winter, again in line with historical trends and other data sources.

Figure 10 shows the breakdown of both our winter and peak forecast by terminal.

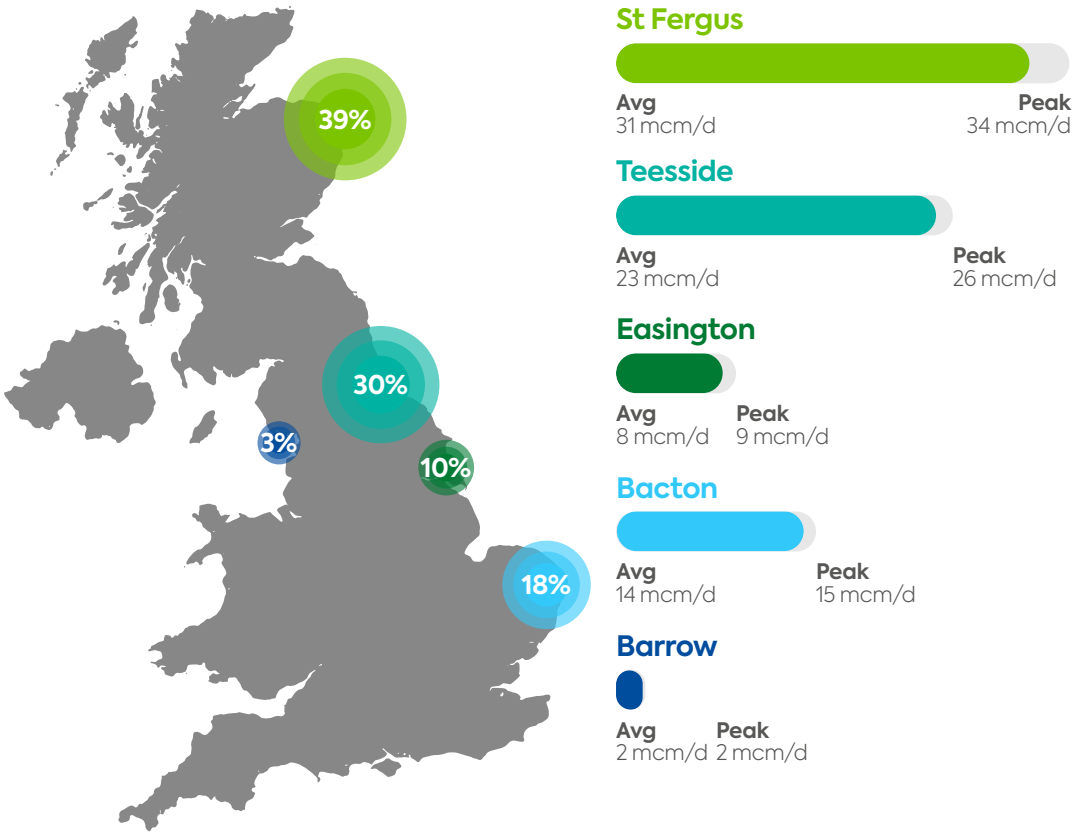
The UKCS is home to more than 200 active oil and gas fields. Table 7 below highlights the top 20 producing fields, and the terminals they are connected to, which account for almost 60% of total production.

Table 7
Top 20 producing UKCS fields

Terminals	Fields
St Fergus	Rhum, Britannia, Pierce, Arran, Brodgar, Alwyn North, Victory
Teeside	Culzean, Breagh, Everest, Judy, Erskine, Jade
Easington	Tolmount
Bacton	Elgin, Franklin, Cygnus, Shearwater, Leman
Barrow	South Morecambe

Figure 10
Map of terminals showing UKCS flows split by sub terminals

Source: National Gas





Liquefied natural gas (LNG)

Spotlight

As highlighted in the previous Winter Review, LNG imports increased during winter 2025/26, driven by higher gas demand in Great Britain and stronger export requirements to continental Europe.

Looking ahead to winter 2026/27, LNG imports are expected to rise further as they increasingly compensate for the loss of supply resulting from the natural decline in UK Continental Shelf (UKCS) production, as shown in [Table 2](#).

Figure 11 also highlights the growing importance of the United States within the UK's LNG supply mix. US cargoes accounted for more than 80% of delivered LNG volumes, underlining the UK's continued reliance on the US as its primary source of LNG supply.

Global LNG supply is forecast to increase over the winter period, supported by new liquefaction capacity that has already entered the market this year. This includes both Golden Pass LNG and Corpus Christi LNG, which approximately have nameplate capacities of 21.2 bcm and 40.3 bcm per year respectively. Further growth is expected next year, with several major US projects, including Port Arthur LNG, Rio Grande LNG and CP2 LNG, scheduled to come online, adding a combined nameplate capacity of approximately 69.5 bcm per year.

The ongoing loss of Qatari LNG exports has reinforced the importance of supply diversification, with disrupted volumes equivalent to around 10 bcm per month. While the reduction in Middle Eastern LNG supply has had a significant impact on global gas markets, the ongoing expansion of US liquefaction capacity is expected to help offset some of these losses. Furthermore, the UK typically can attract LNG from a wide range of exporting countries such as Norway, Algeria and Nigeria; this should ensure supply availability.

- Market considerations:
- LNG market fundamentals are broadly balanced heading into winter.
 - European storage levels are below the 5-year average, increasing Europe's dependence on LNG imports during the winter period.
 - Strong European LNG demand could intensify competition for cargoes and place upward pressure on prices.
 - Supply tightness resulting from disruptions through the Strait of Hormuz may continue to affect winter market conditions.
 - Any storage deficits carried forward from summer could increase European LNG demand during winter as markets seek to replenish lost supply.

Figure 11
GB delivered LNG winter volumes 2024/25 vs 2025/26 by source

Source: LNG Journal

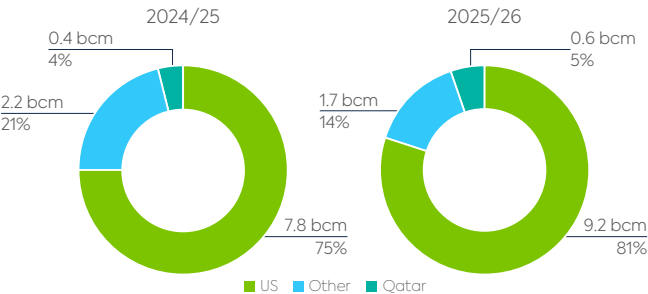
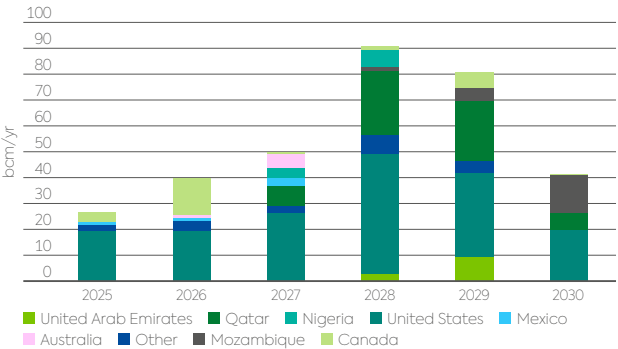


Figure 12
Global annual LNG liquefaction capacity additions from post-FID projects (bcm/yr)

Source: IEA



LNG continued

 Spotlight

For the GB market, LNG remains the primary source of flexibility for meeting increases in overall demand during the winter period. In addition, alongside storage and interconnectors, it plays a crucial role in responding to short-term fluctuations in supply and demand.

Price spreads ultimately determine the destination of spot cargoes. Based on recent experience, we expect the market to continue responding effectively to demand signals, with price differentials attracting the necessary cargoes even under stressed conditions. Typically, the UK National Balancing Point (NBP) holds a marginal premium to Europe Title Transfer Facility (TTF) on average winter but the aftermath of the Middle Eastern conflict may challenge this assumption.



The closure or partial closure of the Strait of Hormuz resulted in the loss of almost 20 percent of global LNG supply.

The market impact has been mitigated, in part, by strong growth in LNG supply from elsewhere, notably North America, and demand curtailment as a result of policy decisions in Asian markets. The impact on prices has been mitigated, therefore, especially as Europe has not been refilling storage to the same extent as in previous years. This could change, however, if the closure of the Strait is prolonged. The GB market and Europe will not go short of LNG, but wholesale prices could rise further to elicit a demand response to balance the market.

Mike Fulwood
Senior Research Fellow, OIES



EU

 Spotlight

Following on from the previous winter, we do not foresee significant exports to the continent, despite forecasted low EU storage.

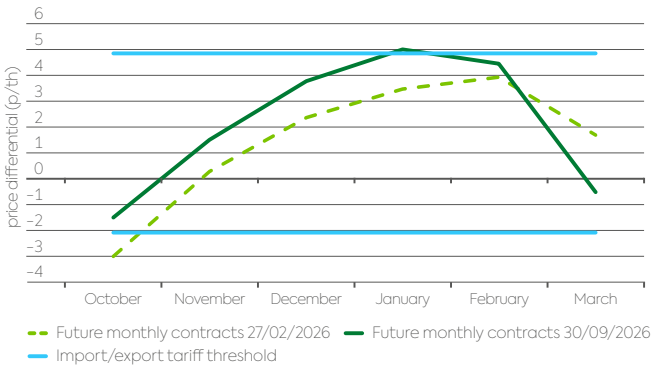
The shape of the future curve for winter 26/27 NBP-TTF price spread has largely remained in line with previous years (figure 13). The contrast between the spread before the Strait of Hormuz was closed (27/02/26) and the current spread (27/07/26) is mainly seen in the shift in peak which now sits in January rather than February.

The shape of the curve still indicates GB exports should be higher in October due to lower EU storage. However, the remaining winter month price spreads are not wide enough to offset interconnector tariff costs, suggesting that both imports and exports are likely to remain relatively subdued. As a result, we expect cumulative interconnector flows this winter to be in line with the previous period. However, interconnectors will continue to provide operational flexibility, responding to short-term market signals through imports into GB or exports to continental Europe when required, such as during periods of cold weather or temporary disruptions to alternative sources of supply.



Figure 13
NBP-TTF monthly future contract spreads, with interconnector tariff thresholds

Source: Argus, ICE 





EU continued

Spotlight

Under a cold winter scenario, GB would require imports from continental European interconnectors to balance supply and demand. While under our current supply assumptions the overall import volumes are low, these supplies are an important component to meet GB demand in cold conditions. Further details on the volumes required can be seen in our winter scenarios, which model the market under different conditions.

To test how reliable these continental European supplies would be, we have analysed three scenarios for the winter ahead (table 8), covering cold and average weather, along with a cold snap. Our assessment is based on the entire EU market, since in recent years we have seen the importance of a coordinated response across the EU to ensure security of supply. The analysis is based on data from Wood Mackenzie’s Q2 Europe Gas and Power Market Short Term Outlook and ENTSOG’s Summer Supply Outlook 2026 with Winter 2025–26 Overview.

We expect EU storage to reach around 70% fullness ahead of winter 2026/27, based on current levels and the ongoing refill trend. In all scenarios, we have used this as the starting point for EU storage. This is significantly lower than in recent years and towards the bottom of the ten-year range. As a result of this, it is expected the EU will utilise LNG more heavily

this winter as a source of flexibility with less reliance on storage.

In the average scenario, there remains substantial flexibility, with LNG imports covering just over 40% of winter demand.

To assess colder conditions, we modelled a 15% increase in demand equivalent to an additional 33 bcm. Two approaches were tested:

- 1. LNG-focused scenario: LNG terminals operated at an average of 85% capacity, supplying an extra 25 bcm.
- 2. Balanced scenario: LNG contributed 19 bcm, while storage withdrawals increased by 15 bcm.

Figure 14 shows the resulting stocks for these scenarios against the average stocks from the last ten years, along with 2025/26 actuals. Given the lower starting stocks, most of the scenarios track towards the bottom of the historical range for much of the winter. In the average winter scenario, stocks end the winter at a similar level to last year, but are lower in both cold winter scenarios. The Balanced scenario results in the lowest stock levels, falling to around 20 bcm. While these are historically low values, this is still a significant amount of gas, and does indicate that flexibility remains to support imports to GB if required during the winter.

Figure 14
EU storage under average, cold and supply loss conditions

Source: AGSI, ENTSOG, Wood Mackenzie

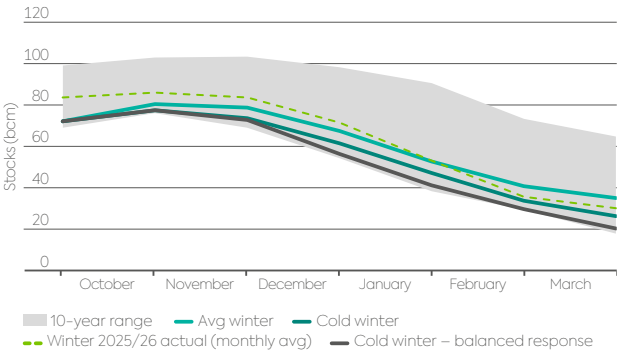


Table 8
European demand and flexible supply under average, cold and supply loss conditions

(bcm)	Demand	Unused LNG capacity (existing)	Storage stocks remaining
Average winter	222.3	41.3	34.7
Cold winter – LNG primary responder	255.7	17.0	26.2
Cold winter – balanced response	255.7	19.9	20.0



Winter preparations

Preparing for the coming winter



Preparing for the coming winter

As a prudent system operator, we work closely with the Department for Energy Security and Net Zero (DESNZ), Ofgem, and NESO to continually monitor supply/demand patterns, assessing any potential scenarios and associated risks that may arise.

We have already taken several steps to ensure we are well prepared to maintain safe and secure operation of the gas transmission system, and we continue to look for opportunities to implement further improvements.

We have undertaken significant work to maintain our assets over the summer period, so we are heading into winter with good asset availability. During summer 2026, we undertook asset maintenance on all our NTS compressor sites and significant lengths of gas pipe.

On 12 October, NGT will facilitate the annual Network Emergency Coordinator (NEC) industry assurance exercise. The aim of this exercise is to demonstrate that the gas industry is prepared and able to meet its obligations in the event of an NGSE.

A key focus of the exercise will be to test communication processes across the industry and its stakeholders, ensuring that timely and accurate information is being shared between participants and effective emergency strategies are being produced and implemented.

As in previous years, the exercise will continue its whole energy system focus.

In addition to the exercise on 12 October, multiple smaller exercises will be undertaken between June and October to target the learning points from the exercise last year. These include:

- Testing the sharing of information
- Improving interactions and procedures for isolation
- Understanding the implications of isolation actions on the ability to restore safely.





Supply & demand scenarios

- Our scenarios
- Sensitivities



Our scenarios

The Winter Outlook presents three scenarios that illustrate how the NTS could be balanced under a range of credible demand profiles.

It is important to note that none of our scenarios are intended to illustrate a best or worst case for the forthcoming winter. The aim is to provide a range of scenarios that highlight the extent to which flexible sources of supply are available to GB to meet different demand levels.

The demand is based on our expectations for the coming winter as detailed in the demand chapter earlier in the document. In these scenarios we have applied historic weather conditions to understand what demand could look like this winter if we see challenging weather patterns.

To model supply we have defined a merit order to simulate how the market may balance supply and demand. It should be noted there is significant flexibility in the GB gas market so there are a number of different ways to balance supply and demand, this will depend on a number of factors such as global gas markets, weather conditions in Europe and commercial contracts.

It should be noted while the model does inject into storage when there is a surplus of supply it does not increase supplies to allow injections when stocks have been depleted. This does lead to less cycling of storage than we see in the GB market which can lead to a more pessimistic storage deliverability than would be expected in real world conditions.

The merit order applied looks to utilise UKCS, some Norway and limited levels of LNG as a baseload supply. We then look to balance supply and demand using the rules in the table on the right.



Scenario	Rationale
Scenario 1: Typical winter (2019/20)	We simulated demand based on the weather experienced in winter 2019/20 as being representative of the daily demand we would expect in a typical winter.
Scenario 2: Cold winter (2010/11)	We have simulated demands from winter 2010/11 as representative of a cold winter, as this period contains the highest-ever daily gas demand level seen on the NTS, with sustained high demands throughout the majority of the winter.
Scenario 3: Cold snap (2017/18)	We have simulated demands from winter 2017/18 as representative of demand levels during an extreme cold snap as this period contains the 'Beast from the East' which resulted in some of the highest daily demand levels seen in the last 10 years, and this period is the most recent example of market tightness.



Scenario 1

Key observations:

- Continental imports are not required to balance demand in this typical winter scenario.
- Overall demands are comparable to our central Gas Winter Outlook forecast.
- GB storage is utilised throughout the winter to meet higher demands. Periods of lower demand provide the opportunity for GB storage to refill.

This scenario is based on the weather conditions experienced in the 2019/20 winter.

While this is close to an average winter, this is not exactly the same as the seasonal normal winter our forecasts are based on. So, while overall supplies and demands are similar to our central forecast, there are some minor differences. Conditions are mild for most of the winter, limiting the depletion of storage, which maintains a high deliverability throughout the winter. There are a few colder spells in the second half of the winter and these see storage operators take advantage of the opportunity to utilise their stocks.

Table 10 highlights the supply mix on the highest demand day (21 January) and the day with the highest storage withdrawal (5 March) in this scenario. Storage withdrawals on these days are 54 mcm/d and 63 mcm/d respectively. No continental imports are required to meet demand in this scenario. Under these conditions, there is huge flexibility so in real-world conditions the way supply balances demand could be very different.

Table 9
Compare scenario demand with central forecast (bcm)

Demand breakdown	Scenario	Winter Outlook forecast
Non-daily metered (NDM)	27.1	26.4
Daily metered (DM) and Industrial	3.7	3.7
Gas demand for electricity generation	7.6	7.6
Exports to Ireland	3.3	3.3
Exports to continental Europe	1.4	1.4
GB storage injection	1.7	2.1
Total	44.9	44.6

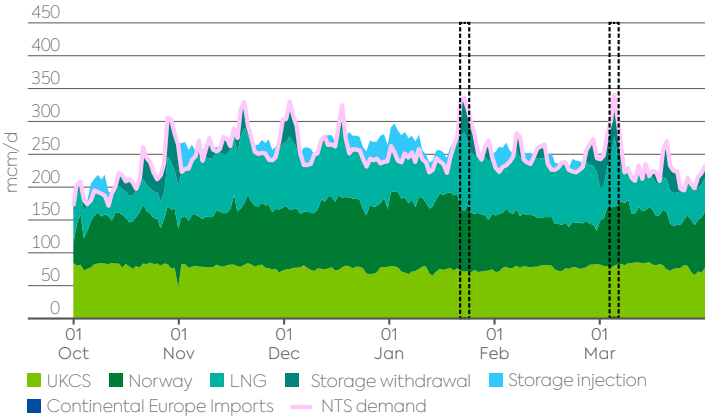
Table 10
Compare scenario supply with central forecast (bcm)

Supply breakdown	Scenario	Winter Outlook forecast
UK Continental Shelf	14.2	14.2
Norway	15.6	15.5
LNG Import	12.7	12.1
Imports from continental Europe	0.0	0.1
GB storage withdrawal	2.5	2.3
Total	44.9	44.2

Table 11
Interesting days breakdown (peak 21 January, high storage 5 March)

Supply breakdown	Peak (mcm/d)	High storage (mcm/d)
UK Continental Shelf	72	81
Norway	92	90
LNG Import	120	107
Imports from continental Europe	0	0
GB storage withdrawal	54	63
Demand	337	341

Figure 15
Scenario 1 supply



Scenario 2

Key observations:

- Continental imports are required to balance demand in this cold winter scenario.
- Overall demands are higher than our central Gas Winter Outlook forecast.
- GB storage is utilised throughout the winter to meet higher demands. A persistent cold spell in December limits refill opportunities and deliverability is reduced.

This scenario is based on the weather conditions experienced in the 2010/11 winter.

Under colder conditions, winter demand is 4.2 bcm higher than in the average scenario, with around 3.5 bcm driven by additional NDM demand given the lower temperatures. Power demand also rises to levels seen in winter 2024/25, reflecting cold, still conditions. To meet this requirement, LNG and Norwegian supplies are higher than in our central forecast.

Table 14 shows the supply mix on the highest demand day (1 December) and the day with the greatest need for continental imports (19 December). On 1 December, high storage levels mean continental imports are not needed to balance the system.

Cold weather persists through much of December, significantly reducing storage and limiting refill opportunities. On 19 December, demand reaches 414 mcm, just below the peak day; with storage constrained, around 37 mcm/d of continental imports are needed to meet demand.

Table 12
Compare scenario demand with central forecast (bcm)

Demand breakdown	Scenario	Winter Outlook forecast
Non-daily metered (NDM)	30.0	26.4
Daily metered (DM) and Industrial	3.8	3.7
Gas demand for electricity generation	9.2	7.6
Exports to Ireland	3.5	3.3
Exports to continental Europe	0.4	1.4
GB storage injection	1.9	2.1
Total	48.8	44.6

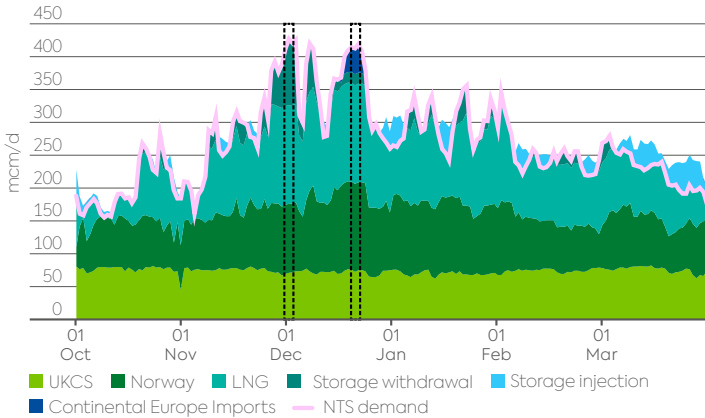
Table 13
Compare scenario supply with central forecast (bcm)

Supply breakdown	Scenario	Winter Outlook forecast
UK Continental Shelf	13.4	14.2
Norway	16.2	15.5
LNG Import	16.8	12.1
Imports from continental Europe	0.2	0.1
GB storage withdrawal	2.1	2.3
Total	48.8	44.2

Table 14
Interesting days breakdown (peak 1 December, high imports 19 December)

Supply breakdown	Peak (mcm/d)	High storage (mcm/d)
UK Continental Shelf	71	76
Norway	105	134
LNG Import	150	150
Imports from continental Europe	0	37
GB storage withdrawal	101	17
Demand	427	414

Figure 16
Scenario 2 supply



Scenario 3

Key observations:

- GB storage can respond to periods of high demands with high flows when required, typically refilling during periods of lower demands.
- Storage continues to deliver during the cold snap but as stocks deplete the max deliverability falls.
- There remains flexibility in this scenario. While Norway and LNG have been maximised on the peak day, there remains flexibility from storage and interconnectors.

This scenario is based on the ‘Beast from the East’ cold snap experienced in February and March 2018, which included the coldest CWV day in the last 20 years.

Drawing on the storage analysis, we have assumed medium range storage (MRS) stocks are 65% full before the cold snap. This is consistent with the lower end of stock levels observed ahead of cold snaps, and would be plausible if the event occurred later in the winter.

Figure 17 sets out the supply mix across the cold snap, with maximum storage deliverability shown as a percentage. Although storage deliverability falls during the period, there is still enough deliverability to meet demand without requiring imports from continental Europe. The model seeks to maximise Norwegian gas and LNG deliveries, while flexibility remains from both storage and interconnectors that could have been used.

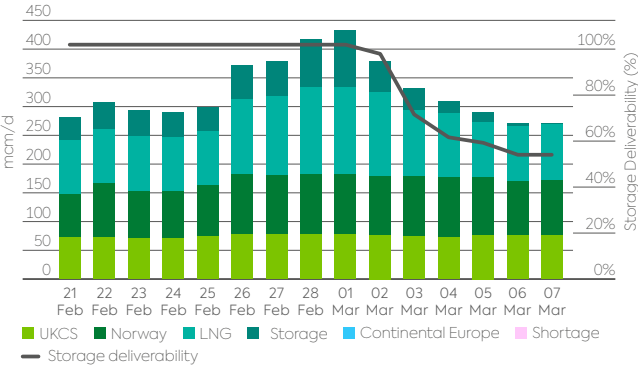
Table 15
Storage stock levels for scenario 3

MRS storage % full	Opening stocks	Volume used over period
64%	1,039	608

Table 16
Average and max supply and demand for cold snap scenario

	15 day average (mcm/d)	Max (mcm/d)	Date
Demand	329	433	1 Mar
UK Continental Shelf	76	79	7 Mar
Norway	97	106	1 Mar
LNG import	114	150	28 Feb
GB storage withdrawal	43	99	1 Mar
Imports from continental Europe	0	0	21 Feb

Figure 17
Cold snap supplies with 65% full storage



Sensitivities

To understand the impact of disruptions to the market we have included two sensitivities to our scenarios. Both sensitivities are based on the cold snap scenario, the first applies a restriction to LNG deliveries and the second tests the impact of lower storage stocks.

Cold snap with low LNG availability

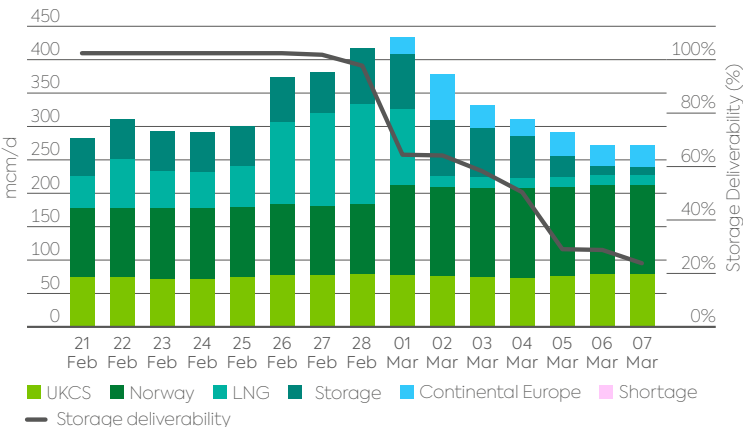
In this scenario, we reduce the LNG available to simulate a period of low LNG deliveries ahead of the cold snap and only a single delivery during the period. At the start of the period, LNG stocks are 50% full. Over the cold snap, there is only one LNG delivery scheduled.

With LNG stocks limited, deliverability is restricted at the start of the period. As the demand increases, deliverability does increase but stocks deplete rapidly from the peak day onwards and are at minimum levels for the final 6 days.

Storage is used more heavily throughout, and deliverability also declines through the second half of the cold snap with limited opportunities for injections.

With other sources at their maximum, imports from continental Europe are required from the peak day onwards, which are at 68 mcm/d, representing 83% of capacity, on day 10 of the cold snap.

Figure 18
Cold snap supplies, stocks at 65% with low LNG availability

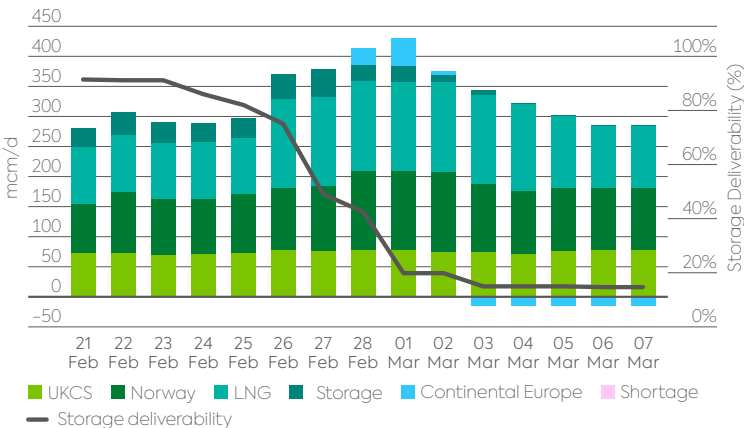


Cold snap with low storage stocks

In this scenario, the overall MRS stock was 25% at the start of the cold snap. This simulates a situation where the most responsive MRS sites do not refill ahead of the cold snap which limits the responsiveness of storage.

As the demand increases from day 6, UKCS, Norway and LNG are all towards their maximum level. With lower storage stocks, deliverability starts to fall as sites empty, with continental European imports required to balance the market. On day 9, the highest demand day of the cold snap, a max of 46 mcm of continental European imports, representing 56% of capacity, are required to meet the demand of 433 mcm. In both sensitivities, there is sufficient flexibility to balance the market.

Figure 19
Cold snap supplies – stocks at 25%, no supply loss





Contact us

Industry engagement



Industry engagement

We look forward to continuing the conversation with you at our upcoming engagement forums



The National Gas Energy Forum (NGEF) provides a valuable platform for sharing insights, operational updates, collaboration and future planning across the UK energy sector. It is open to all energy stakeholders and brings together experts from industry, government, energy markets and research organisations.

Throughout the year, we host both hybrid and online forums to share strategic insights on UK energy policy, regulation, market structure and clean power and updates on operational developments and events affecting the National Transmission System (NTS).

We provide online updates on major projects, innovations and system operator updates. The agendas for NGEF reflect current operational events, regulatory changes, industry trends and seasonal issues. [Visit our website to find our more and register for future events.](#)

15 October 2026
Winter Focus
Hybrid forum

↓

3 December 2026
Online

↓

28 January 2027
Hybrid

↓

11 March 2027
Online

↓

22 April 2027
Hybrid

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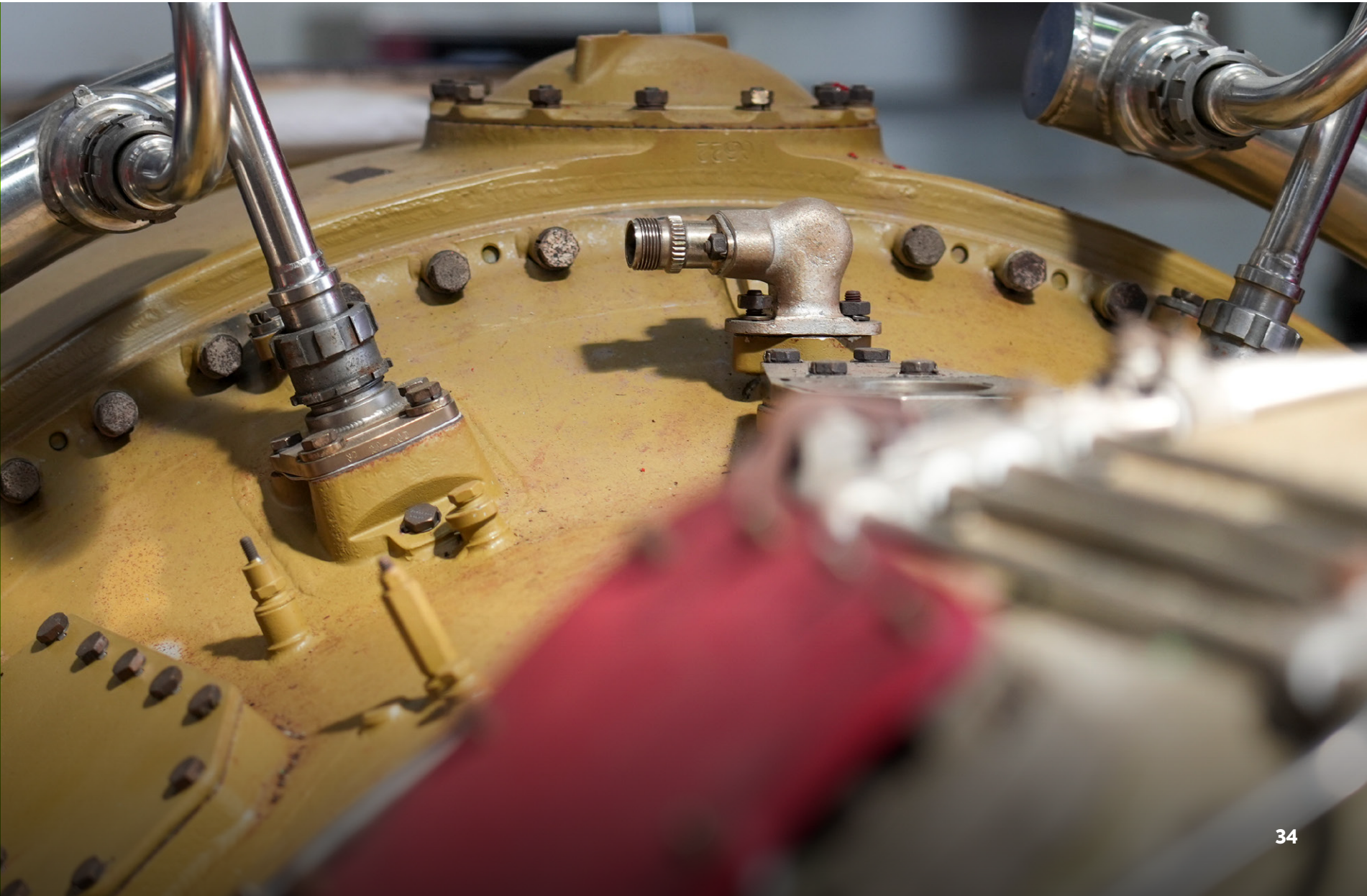
National Gas Transmission
Gallows Hill, Warwick.
CV34 6DA United Kingdom
Registered in England and Wales
No. 2006000

www.nationalgas.com



Appendix

Data tables in TWh and GWh/d



Appendix – Data tables in TWh and GWh/d

Table A
Forecast gas demand for winter 2026/27 and actual and weather corrected demand for 2025/26

TWh (including shrinkage)	2025/26 actual demand	2025/26 weather corrected demand	2026/27 forecast
NDM	282.7	289.6	290.9
DM + Industrial	40.9	40.8	40.6
Power	87.6	88.0	83.6
Total GB demand	411.2	418.4	415.1
Ireland	36.3	36.3	36.4
Exports to continental Europe	15.9	15.9	15.1
Storage injection	23.1	23.1	23.5
Total NTS demand	590.0	497.2	492.6

Notes:
Actual demand does not include an adjustment for weather.
Weather corrected demand applies to NDM and DM only.
The forecast demand is based on a ‘seasonal normal’ view and is therefore weather corrected for NDM and DM.
Total demand also includes shrinkage.

Table B
Historic & forecast winter supplies

Winter TWh/(average GWh/d)	2025/26 actual	2026/2027 forecast
UK Continental Shelf	164.0 TWh (901 GWh/d)	156.2 TWh (858 GWh/d)
Biomethane	3.2 TWh (18 GWh/d)	3.5 TWh (19 GWh/d)
Norway	168.6 TWh (927 GWh/d)	170.8 TWh (939 GWh/d)
LNG Import	129.0 TWh (709 GWh/d)	135.2 TWh (743 GWh/d)
Imports from continental Europe	1.1 TWh (6 GWh/d)	1.1 TWh (6 GWh/d)
GB storage withdrawal	24.1 TWh (132 GWh/d)	25.7 TWh (141 GWh/d)
Total	490.0 TWh (2,692 GWh/d)	492.5 TWh (2,706 GWh/d)

Table C
Peak 1-in-20 demand forecast for 2025/26 and 2026/27

GWh	2025/26	2026/27
Non-daily metered (NDM)	3,424	3,469
Daily metered (DM) and Industrial	363	347
Gas demand for electricity generation	1,083	1,155
Exports to Ireland	431	434
Total demand	5,301	5,418

Appendix – mcm to GWh conversion

Table D
Supply capability for 2025/26 and 2026/27

GWh/d	2025/26	2026/27
UK Continental Shelf	935	941
Biomethane		22
Norway	1,485	1,470
LNG import	1,650	1,914
Imports from continental Europe	913	915
GB storage withdrawal	1,232	1,246
Total	6,215	6,509

Table E
Peak day supply margins for 2025/26 and 2026/27

GWh/d	2025/26	2026/27
1-in-20 peak demand	5,301	5,418
1-in-20 non storage supply	4,983	5,262
1-in-20 storage supply	1,232	1,246
1-in-20 total supply	6,215	6,509
1-in-20 margin	914	1,091
N-1 supply loss	796	895
N-1 margin	118	196



Glossary

List of glossary terms



Glossary

1-in-20 peak demand

This is the highest level of gas demand that we should expect to experience only once in every 20 years. We are obliged to plan and develop the network to meet the 1-in-20 level.

Actual demand

Actual demand is the level of demand seen and does not include an adjustment for weather.

Asset

Any physical part of the network and includes such things as compressors, pipelines, flow valves and regulators.

BBL (interconnector)

A bi-directional gas pipeline connecting Bacton in the UK and Balgzand in the Netherlands.

Bcm

Billions of cubic metres. Unit or measurement of volume, used in the gas industry. 1 bcm = 1,000,000 cubic metres

Biomethane

Biomethane is a naturally occurring gas that is produced from organic material and has similar characteristics to natural gas.

Composite Weather Variable (CWV)

CWV is a single measure of daily weather in each LDZ and is a function of actual temperature, wind speed, effective temperature and seasonal normal effective temperature.

Compressors

Compressors are used to move gas around the transmission network through high pressure pipelines. These compressors move the gas from entry points to exit points on the gas network. They are predominantly gas driven turbines that are in the process of being replaced with electric units.

Continental European interconnectors

A term used to describe both of the bi-directional gas pipelines that connect Bacton in the UK to Balgzand in the Netherlands (BBL) and to Zeebrugge in Belgium (Interconnector (UK) Limited).

Daily metered (DM) demand

A classification of customers where gas meters are read daily. These are typically large-scale consumers.

Demand Side Response (DSR)

DSR is a service that was developed by gas industry representatives to encourage daily metered (DM) consumers to offer to reduce their gas demand during times of system stress.

Electricity (power) generation

Electricity generated by the burning of gas.

Export to continental Europe

Gas exported to continental Europe via interconnectors.

GB demand

Demand excluding interconnectors, storage injection and exports to Ireland.

GW

Gigawatts. Unit or measurement of power, used in the gas industry. 1 GW = 1,000,000,000 watts

Import/export tariff threshold

Break-even costs associated with the utilisation of cross-border interconnector pipelines, flowing gas between the UK and European continent.

Interconnector (UK) Limited

Interconnector (UK) Limited is a bi-directional gas pipeline connecting Bacton in the UK and Zeebrugge in Belgium.

Glossary

LNG
Liquefied natural gas that has been converted to liquid form for ease of storage or transport. It is formed by chilling gas to -161°C so that it occupies 600 times less space than in its gaseous form.

LRS (long range storage)
Gas storage facilities designed to store gas on a seasonal basis. These sites typically inject over the summer and withdraw gas over the winter.

Margin/Supply Margin
The difference between gas supply and demand. A positive margin indicates supply is greater than demand. A negative margin shows demand is greater than supply.

mcm
Million cubic metres.

Moffat (interconnector)
The interconnector pipeline that connects the NTS at Moffat (in Scotland) to the Republic of Ireland, Northern Ireland and the Isle of Man. Physical gas flows are currently only possible in the direction of exit from GB.

MRS (medium range storage)/GB storage
Gas storage facilities designed to switch rapidly between injection and withdrawal to maximise the value from changes in gas price.

N-1 largest loss/Under N-1 conditions*
The N-1 assessment means that we, as the Gas System Operator, have to ensure that:

- the NTS is designed and built to meet a 1-in-20 peak day demand as required under the Gas Transporters Licence. This is defined as the amount of infrastructure (pipes and compressors etc.) needed to transport the gas that would be required by our customers in the coldest day of winter, in the coldest winter we could expect in a 20 year period.
- the high pressure gas network has sufficient resilience to meet a 1-in-20 peak day demand, even with the failure of the single biggest piece of infrastructure.

National Transmission System (NTS)
A high pressure gas transportation system consisting of compressor stations, pipelines, multi-junction sites and offtakes. Pipelines transport gas from terminals to offtakes. The system is designed to operate at pressures up to 94 barg.

Network Gas Supply Emergency (NGSE)
An NGSE occurs when we are unable to maintain a supply/demand balance on the NTS using our normal system balancing tools. As a consequence of the imbalance between supply and demand, pressures in the system fall and it may not be possible to safely maintain gas supplies to industrial and domestic gas consumers who are supplied with gas either directly or indirectly from the NTS. An NGSE may be caused by unforeseen circumstances, such as pipeline or equipment failure, or where system demand exceeds either total supply or planned system capacity.

Non-daily metered (NDM) demand
A classification of customers where gas meters are read monthly or at longer intervals. These are typically residential, commercial or smaller industrial consumers.

Norway/Norwegian Continental Shelf (NCS)
Gas supplied to the NTS via pipelines from Norway.

NBP
The National Balancing Point (NBP) is a virtual trading location for the sale, purchase and exchange of UK natural gas.

***National Gas Winter Outlook Margins**
The Gas Winter Outlook margins assessment compares available gas supply deliverability with forecast 1-in-20 peak day demand to assess whether the network has sufficient physical capability under severe winter conditions. Supply capability is based on assessed entry point deliverability, constrained by the ability of the National Transmission System (NTS) to accept and transport flows. UK Continental Shelf (UKCS) and selected Norwegian flows are further adjusted to reflect the maximum volumes expected to be available during winter.

GSSA
The GSSA assessment considers supply availability over a sustained 11-day cold snap, including a 1-in-20 peak day. It assesses whether supplies are expected to remain available throughout a prolonged period of high demand, rather than focusing solely on peak physical deliverability. Expected flows are derated to reflect realistic availability under cold weather conditions, taking account of operational, commercial, and market factors. This provides a more prudent view of supply adequacy across key sources, including storage, LNG, interconnectors, UKCS, and Norwegian supplies.

Glossary

On-The-Day Commodity Market (OCM)

The OCM is the market we use in our role as residual balancer. The balancing market is operated by the ICE Endex exchange, as appointed by National Gas.

Operating Margin (OM)

OMs relate to how we use gas to manage short-term impacts of operational stresses (e.g. supply loss) where the market response is not sufficient, or during a gas system emergency.

Power

Gas demand for power stations connected to the electricity transmission system. This includes all power stations connected to the NTS, along with some connected to the Gas Distribution Network.

Renewables

Forms of energy generation from renewable resources, which are naturally replenished, such as sunlight and wind.

Storage injection

Gas for storage injection. This is gas which is put ('injected') into a gas storage facility.

Supply capability

The capability of the network to accommodate supply maximums.

Supply maximum

The maximum available supply at an entry point for each supply type based on market intelligence, technical capacities and observed flows.

Storage withdrawals

Gas which enters the NTS from a storage facility.

Total NTS demand

All NTS demand, including interconnectors, storage injection and exports to Ireland.

TTF

TTF is the virtual trading point of the Title Transfer Facility or the Netherlands Securities Transfer Fund, which is used as a reference gas market at European level.

UK Continental Shelf (UKCS)

UKCS is made up of the areas of the sea bed and subsoil beyond the territorial sea over which the UK exercises sovereign rights of exploration and exploitation of natural resources.

Weather corrected demand

The demand expected with the impact of weather removed. Actual demand is converted to demand at seasonally normal weather conditions, by multiplying the difference between actual CWV and expected CWV by a value that represents demand sensitivity to weather.

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