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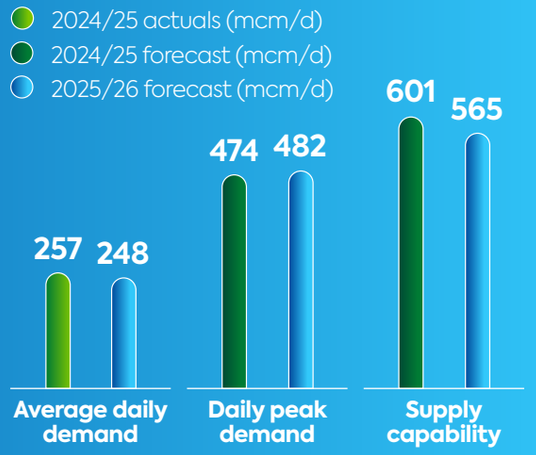
Securing Britain's Energy.

Gas Winter Outlook

October 2025

Key statistics



Key takeaways

1 **Our GB demand forecast (excluding exports to continental Europe & Ireland) for the coming winter is slightly lower (3%) than the previous winter. Total NTS demand (including exports) for the coming winter is also forecast to be slightly lower (4%).** This is mostly due to a reduction in total gas demand for power, following the high experienced last winter, along with reduced exports to continental Europe.

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 could impact the GB market. GB is connected physically to Europe via interconnectors and to the wider global market by LNG.** While 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 it 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.

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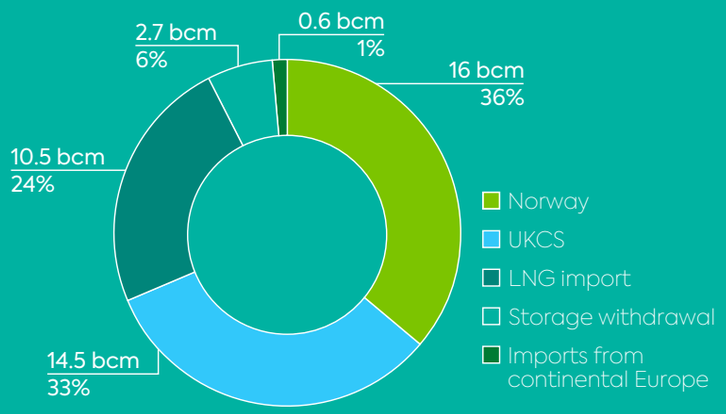
Supply

Steady baseload supplies are expected to be provided by the UK Continental Shelf (UKCS) and Norway.

Flexible supplies are expected to be predominantly from LNG, along with GB storage and continental European imports.

Over the whole winter, the baseload sources provide over half the total supply with LNG imports providing most of the rest.

Supply forecast (bcm)



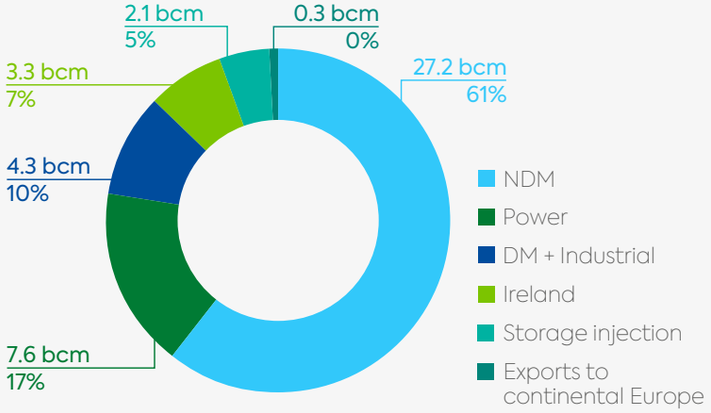
Demand

Non Daily Metered (NDM) forecast demand is very similar to the previous winter (+1%).

Gas demand for power continues to show significant volatility, influenced by weather conditions and renewable generation.

Although a decrease of 18% is forecast for gas demand for power this coming winter (when compared to the previous winter), periods of high demand are still expected during peaks, especially when renewable output is low.

Demand forecast (bcm)



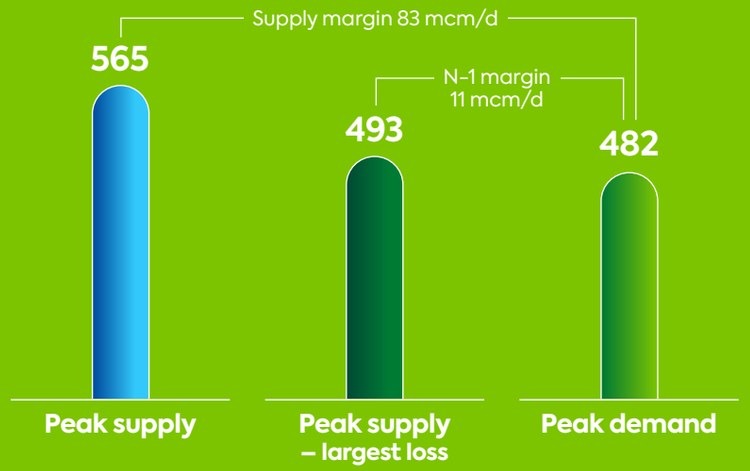
Margins

For this winter, the peak day demand is 482 mcm/d and the peak supply capability is 565 mcm/d.

This results in an intact margin of 83 mcm/d and under N-1 conditions this is 11 mcm/d.

While these are tighter margins than we have seen in the last four years, they are similar to those in 2019/20 and 2020/21.

Supply margin (mcm/d)



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Find out more or get in touch

You can find the full publication here.

For general enquiries, please get in touch here.

For any press enquiries, please get in touch with our Corporate Affairs team here.

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Acronyms explained

1-in-20
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.

bcm
Billions of cubic meters (volume over total winter). To convert into terawatt hours (TWh – energy), multiply by 11.

DM
Daily Metered is a classification of customers where gas meters are read daily. These are typically large-scale consumers.

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.

mcm/d
Millions of cubic meters (daily volume). To convert into gigawatt hours per day (GWh/d – energy), multiply by 11.

N-1
The N-1 assessment is a test to ensure that our network has sufficient capability to meet a 1-in-20 peak day demand, even with the failure of the single biggest piece of infrastructure.

NDM
Non Daily Metered is a classification of customers where gas meters are read monthly or at longer intervals. These are typically homes, businesses or smaller industrial consumers.

UKCS
The UK Continental Shelf 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.