national gas

Securing Britain's Energy.

Gas Winter Review 2025/26 →


Welcome
Demand & supply
Network operability
Preparing for winter
Contact us
Further information on demand
Further information on supply
Appendix
Glossary
national gas transmission

Welcome

We have published the Gas Winter Review 2025/26 as an interactive document.

How to use this document

Home
This will take you to the home page.

Arrows
Click on the arrows to move to previous or next page.

Enlarge/reduce
Hover over the magnifying icon to make charts bigger or smaller.

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

Welcome to this year's Gas Winter Review

National Gas is the owner and operator of Great Britain's national gas network. We play a vital role in ensuring gas is transported safely, reliably and securely from where it enters our network to where it is needed, helping to keep the lights on, industries powered and homes warm.

While National Gas is not responsible for procuring Britain's gas supplies, as the Gas System Operator with responsibility for system planning, we routinely publish demand and supply forecasts to inform the market.

This Winter Review covers the period from October 2025 to March 2026 and sets out our analysis of actual gas demand and supply patterns.

Notably, it tells the story of a system in transition which remains resilient in the face of significant volatility and capable of meeting the demands of a profoundly evolving energy system. It also further reinforces the critical, enduring role the gas network plays, as the country's primary energy system, in Britain's energy security.

While Britain used less gas overall, including for power generation, periods of intense cold (including one of the coldest days in recent decades) drove sharp increases in demand, reinforcing gas's critical role at times of peak system stress.

This winter saw a higher peak demand day than last year, and the second highest peak gas demand for power generation in five years. On the coldest day (5 January), power generation reached 26 GW, up from just 2 GW the previous day. This swing of 24 GW in just 36 hours demonstrates a defining characteristic of the system: while reliance on gas may be lower overall, it remains essential during short periods of peak demand, when flexibility is most needed.

As electrification continues and peak electricity demand rises, reliance on intermittent generation will increase, reinforcing the importance of the gas network in maintaining Britain's energy security during periods of low renewable generation.

While Britain's gas storage capacity continued to attract attention this winter, storage levels remained resilient in the face of cold weather-driven demand, with stocks around 70% full on the day prior to peak demand. Meanwhile, on the supply side, UK Continental Shelf (UKCS) output has continued to decline, increasing Britain's reliance on a more diverse and international supply mix.

Against this backdrop, attention has understandably turned to the potential implications of the conflict in the Middle East, which has raised questions about Britain's gas supply. Our recently published Gas Summer Outlook 2026 indicates that the market has the capacity to meet near-term demand, and we continue to have no immediate operational concerns.

Given the continued uncertainty in the international landscape, it is too early to definitively assess the longer-term impact on Britain's gas supplies. We will continue to monitor developments and provide further analysis in our next Gas Winter Outlook if required.

Welcome continued

As preparations begin for the coming winter, we recognise that Britain's gas supply landscape is continuing to evolve as domestic production declines and demand and generation patterns shift.

Across government, NESO, industry and regulators, there is a shared understanding of these changes and the near and long-term risks they present. These challenges are clearly articulated in previously published assessments including our Gas Winter Outlook 2025, NESO's Gas Supply Security Assessment, and our response to the Government's Gas System in Transition: Security of Supply consultation.

In this context, there remains a requirement for swift and coordinated action to address these risks. We will continue working closely with partners to prepare the system for the months ahead, while supporting government and Ofgem with policy options that maintain security of supply and enable Britain's energy transition.

Glenn Bryn-Jacobsen
Director of Energy Systems & Resilience

About US

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 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.

Other publications in this suite:

- Gas Summer Outlook published annually in April.
- Gas Winter Outlook published annually in October.
- Gas Ten Year Statement (GTYS) published annually in November.

We are responsible for transporting gas safely, efficiently and reliably across nearly 5,000 miles of pipeline.

Demand & supply

Demand summary

Great Britain's demand* for winter 2025/26 was 4% lower than the previous winter.

Some key observations on demand for winter 2025/26 are:

- Weather corrected NDM demand was about 2% lower than the previous winter, due to consumers choosing to use less gas.
- Total gas demand for electricity generation was significantly lower than the previous winter. Last winter's elevated demand was influenced by colder temperatures, reduced wind output and a decline in coal-fired generation, all of which increased reliance on gas demand for electricity generation.
- Whilst the total winter demand is reducing, the daily peaks remain, and the highest gas demand for electricity generation in a single day was 103.1 mcm/d. Read more about this in Spotlight: NTS gas demand for electricity generation.
- DM & Industrial demand was slightly lower than the previous winter. The impacts vary from site to site, with some reductions in demands and some closures of plants but other sites showing little change from the previous winter.

Total NTS demand for winter 2025/26 was 2% lower than the previous winter.**

Some key observations on demand for winter 2025/26 are:

- Demand for Ireland was in line with our forecast and demand levels seen over recent years.
- GB storage injections were slightly lower than the previous winter, as were storage withdrawals. This was due to less storage cycling, which is normal behaviour as the market can draw on multiple flexible sources of supply based on both availability and commercial conditions at the time.
- Exports to continental Europe were significantly higher (1.4 bcm), largely driven by Great Britain's demand being generally lower across the winter coupled with supplies to Great Britain being greater than demand.

The highest daily demand during winter 2025/26 was 407 mcm/d which occurred on 5 January. This was slightly higher than the max of 392 mcm/d last winter. Read more about this in our Spotlight: NTS gas demand for electricity generation.

Figure 1
Key stats

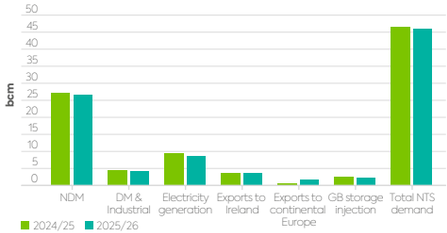


Table 1
Demand summary (weather corrected)

Demand in bcm	2024/25 weather corrected demand	2025/26 forecast	2025/26 weather corrected demand	WC vs last year % change
NDM	26.9	27.2	26.3	-2%
DM & Industrial	4.1	4.3	3.7	-10%
Electricity generation	9.2	7.6	8.6	-7%
Great Britain's gas demand	40.3	39.1	38.6	-4%
Exports to Ireland	3.4	3.3	3.3	-1%
Exports to continental Europe	0.4	0.3	1.4	284%
GB storage injection	2.4	2.1	2.1	-12%
Total NTS gas demand	46.4	44.8	45.4	-2%

* Great Britain's demand is comprised of gas used in households, the commercial sector, for power generation and for industry.

** Total NTS demand is Great Britain's demand combined with gas exported to continental Europe and Ireland, along with storage injection.

Demand summary continued

– There were two notable colder periods in winter 2025/26, one in November and one in January, these can be seen in figure 2. The cold spell in January included the coldest day of the winter on 5 January, coinciding with the highest demand day. This had a composite weather variable (CWV) of -0.8° which is close to the average for the coldest day of the winter in our 66 year weather history.

– Actual demand followed a similar pattern to weather corrected demand, falling by about 3% compared to the previous year.

– Overall winter 2025/26 was warm, statistically a 1-in-10 warm and the sixth warmest in the previous 66 years based on CWV.

– While this was warmer than winter 2024/25 this did not have a significant impact on demand. This is likely because the colder periods, which have the biggest impact on heating demand, were quite similar for both winter 2024/25 and 2025/26.

Table 2
Demand summary (actual demand)

Demand in bcm	2024/25 actual demand	2025/26 actual demand	Actual vs last year % change
NDM	26.4	25.7	-3% ↓
DM & Industrial	4.1	3.7	-10% ↓
Electricity generation	9.2	8.0	-14% ↓
Great Britain's gas demand	39.7	37.4	-6% ↓
Exports to Ireland	3.4	3.3	-1% ↓
Exports to continental Europe	0.4	1.4	284% ↑
GB storage injection	2.4	2.1	-12% ↓
Total NTS gas demand	45.9	44.2	-4% ↓

Figure 2
NDM demand – actual vs seasonal normal

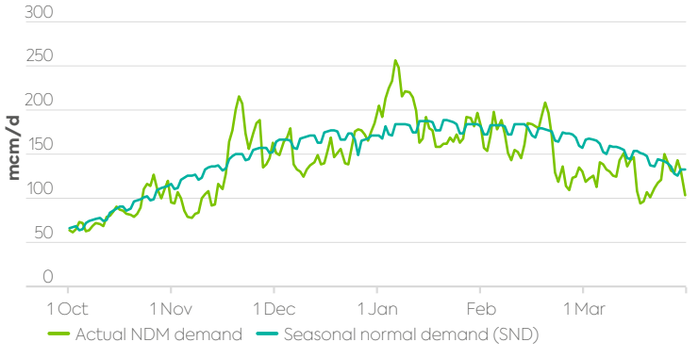
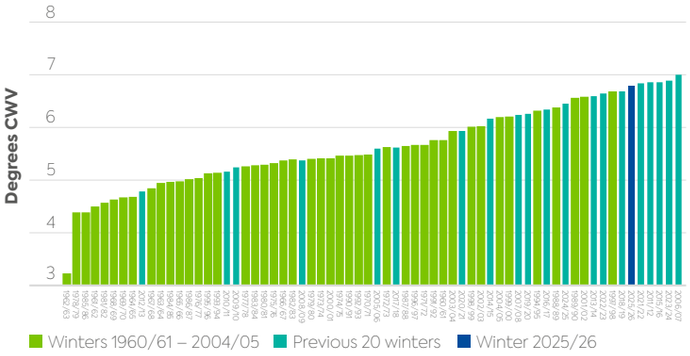


Figure 3
Historical winter composite weather variables



NTS gas demand for electricity generation Spotlight

Key observations:

- **Overall gas demand for electricity generation fell compared with winter 2024/25, driven by higher renewable output (particularly wind).**
- **However, peak day and within-day gas demands remain high, continuing to exceed 100 mcm/d and requiring large swings in gas-fired generation.**

Winter demand

Total gas demand fell compared to winter 2024/25. This was primarily due to increases in output from wind generation, this was based on a return to more normal wind conditions in winter 25/26. As shown in figure 4, there were also some slight increases to Hydro, Biomass, Solar, Imports and other generation, with falls in Nuclear and Storage.

Day-to-day demand

Variability in demand continues to be significant (see table 3) with peak gas demands remaining above 100 mcm/d for the last 4 years. During winter 2025/26, the peak NTS gas demand for power in a single day was 103.1 mcm/d, the average was 43.8 mcm/d and the lowest was 11.1 mcm/d. On average the gas generation running on these days was 22 GW, 10 GW and 2 GW respectively.

Within-day demand

The highest NTS gas demand for power was seen on 5 January. On the same day, gas-fired generation output reached one of the highest levels for the winter, at 26.1 GW. On the previous day, gas-fired generation output was as low as 2.3 GW before increasing over the day in response to increasing demand and changes in renewable generation. By enabling the electricity system to balance as both demand and other generation are changing, the gas network plays a key role in providing security to Great Britain's energy system. To ensure this flexibility can be delivered from the gas network, it is important to ensure we have a full fleet of compressors available to move the gas from where it comes onto the network to where the increased demand is.

We expect these day-to-day and within-day peaks and swings in demand to become larger going forward. As renewable energy sources increase along with additional electricity demand, gas will be required to fill the gap when renewable energy sources are unavailable.

Table 3
Min, max and average daily NTS gas demand for electricity generation.

Winter (mcm/d)	Max	Avg	Min	Range
2021/22	92.2	51.8	15.3	76.9
2022/23	100.8	51.1	11.1	89.7
2023/24	102.6	42.8	11.6	91.0
2024/25	107.4	50.7	15.4	92.0
2025/26	103.1	43.8	11.1	92.0

Figure 4
Electricity generation sources winter 2024/25 to winter 2025/26. Source: NESO

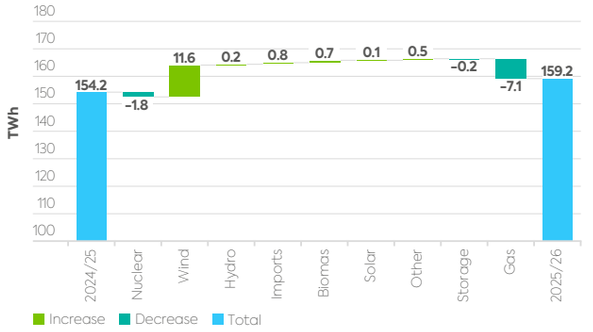
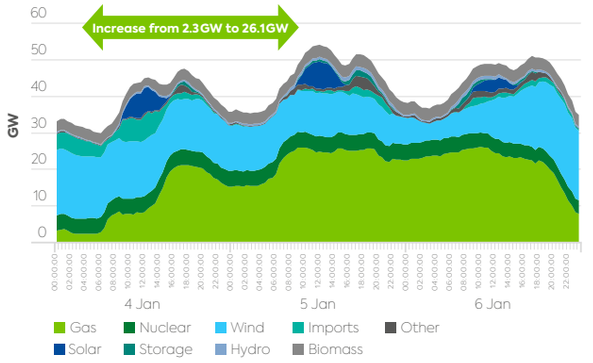


Figure 5
Half hourly electricity generation. Source: NESO



Supply summary

Supplies in winter 2025/26 were diverse, with UKCS and Norway providing steady baseload supplies. Flexible supplies were predominantly from LNG, along with GB storage injections and imports from continental Europe.

Baseload supplies from UKCS were broadly in line with our expectations:

- UKCS supplies were slightly lower (3%) than the previous winter given the steady decline in UKCS production. The 3% decline is lower than the 6% decline forecast in our 2025 Winter Outlook.
- Norwegian production levels were similar to the previous winter and flows were in line with expectations. We saw slightly lower flows when compared to the previous winter which is reflective of the good supply availability from all sources throughout the winter.

Flexible supplies predominantly came from LNG and GB storage withdrawals, along with some imports from continental Europe.

- LNG supplies were higher than the previous winter, largely due to the increase in total gas demand. Read more about this in our Spotlight: flexible supplies.
- GB storage behaved as expected, filling during periods of low demand and emptying during periods of high demand. Read more about this in our Spotlight: flexible supplies – GB storage.
- Imports from continental Europe remained low as anticipated. The behaviour of interconnectors is extremely price sensitive and therefore highly flexible.

Figure 6
Supply key stats

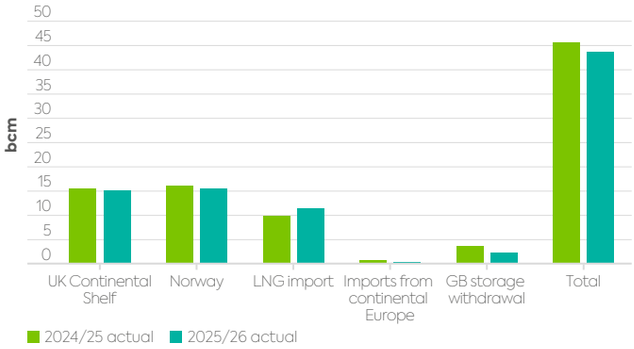


Table 4
Supply summary

Supply sources (bcm)	2024/25 actual	2025/26 forecast	2025/26 actual	% change
UK Continental Shelf	15.4	14.5	14.9	-3%
Norway	16.1	16.0	15.3	-5%
LNG import	9.8	10.5	11.2	15%
Imports from continental Europe	0.6	0.6	0.1	-83%
GB storage withdrawal	3.5	2.7	2.2	-38%
Total	45.4	44.3	43.8	-4%

Flexible supplies

Spotlight

Our main flexible supply sources, LNG, storage and continental imports behaved largely as expected over the winter. All these supplies showed increases during the highest demand periods in November and January.

LNG flows were higher at 11.2 bcm both than the previous winter (9.8 bcm) and than our forecast (10.5 bcm). These were supported by strong deliveries which were higher than the previous winter, with 122 deliveries compared to 107 in the previous winter as shown in figure 8.

While both deliveries and flows did decline in March, (coinciding with the start of the conflict in the Middle East) this is not unusual for the end of the winter and Great Britain remained well supplied.

While imports from the EU did increase during the highest demand periods, these were limited with Great Britain exporting for much of the winter. This is indicative of healthy supplies, both from UKCS and Norway and continued LNG deliveries over the winter. Exports were highest in early November, during a period of lower demand and February.

Figure 7
Flexible daily supply volumes for winter 2025/26

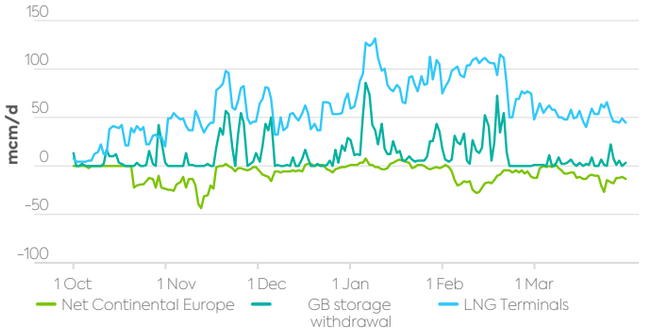
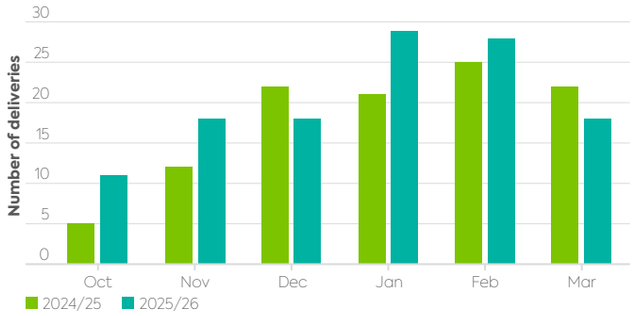


Figure 8
Number of LNG deliveries to GB in winters 2024/25 & 2025/26



Flexible supplies – GB storage

Spotlight

Key observations:

- GB storage played a crucial role over winter, providing supply flexibility (driven by market signals) during periods of high demand and then re-filling during lower demand periods (see more about storage stocks).
- GB storage was over 70% full ahead of the highest demand day on 5 Jan 2026.

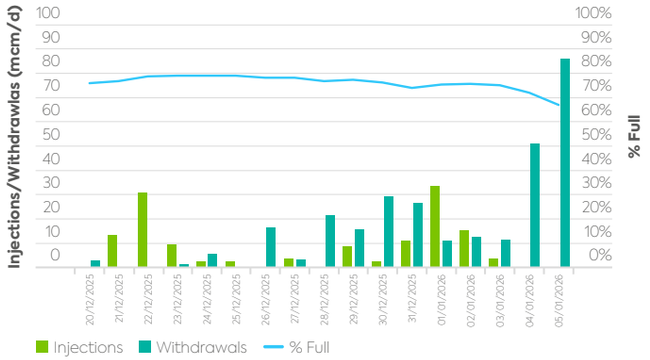
In our Winter Outlook 2025 we explained how GB storage works, along with how different sites behave. Read more.

We also analysed how full GB storage is ahead of cold snaps and this showed that GB storage is between 63% and 95% full. Based on this analysis, we used an assumption of GB storage being 65% full in our cold snap scenarios.

Figure 9 shows that in the two weeks before our coldest day of the winter (on 5 January), stocks remained above 70% full throughout. There was a period of injection before Christmas and, following this, there was a mixture of injections and withdrawals. This resulted in a stock level of around 75% on 4 January, which is in line with our assumptions from the Winter Outlook.

This ensured there was sufficient deliverability in storage to meet the demand for withdrawals – which reached 86 mcm/d, the highest of the winter period.

Figure 9
Storage withdrawals, injections and % full ahead of 5 Jan cold snap



GB storage was over 70% full ahead of the highest demand day on 5 Jan 2026.

Network operability

Compressor utilisation & operating the network

Linepack

Highest demand day – spotlight

Compressor utilisation & operating the network

Key observations:

- **The use of our assets is continually changing due to the variation in supply and demand patterns we see.**
- **Total compressor run hours in winter 2025/26 were higher than the previous winter. This was largely due to the increased supplies at Milford Haven and St Fergus.**

Figure 10 shows the total supply volumes into each terminal on the NTS (bcm, blue arrows), and the compressor utilisation (green circles) over the past two winters (2024/25 and 2025/26).

This helps to visualise how different supply and demand patterns can change how we operate the network, with different combinations of compressors utilised to move gas from an entry point to meet demand.

During the first half of winter, compressor use was like the previous year. This increased from January 2026; this was mostly driven by higher flows at Milford Haven and different configurations to enable isolations on our network.

During February 2026 we saw higher levels of LNG flows through Milford Haven when compared to the previous year (see flexible supplies spotlight). This was coupled with low demand in South Wales and led to a number of constraint days. For more information on these constraints, there are two webinars on our website here and here.

The varying nature of supply and demand patterns and the consequential need to use our assets differently highlights the need to have healthy and resilient assets to ensure we can continue to meet the needs of our customers.

Figure 10
Variation in supply profiles and compressor running hours for winter 2024/25 and 2025/26

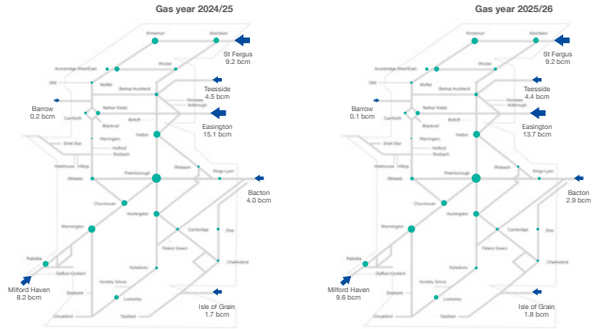
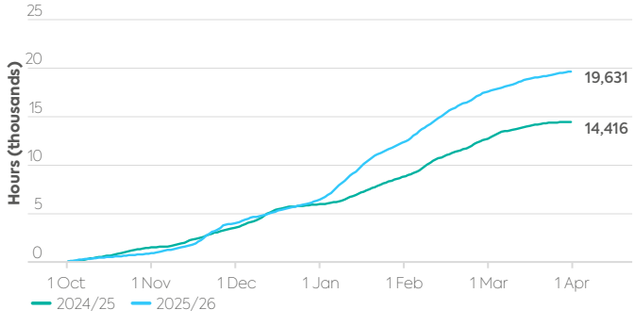


Figure 11
Winter compressor usage (excluding St Fergus compressor)



Linepack

Key observations:

- **The level of maximum and average linepack utilisation was comparable to previous years.**
- **Our customers continue to tell us that they value the ability to supply gas and/or take demand flexibly through the day.**

Linepack (the total volume of gas 'in the pipes' at any given time) is a critical tool in helping us manage within-day mismatches between supply and demand – the stock of gas in the system allows the network to operate when the volume of supply is different to the volume of demand.

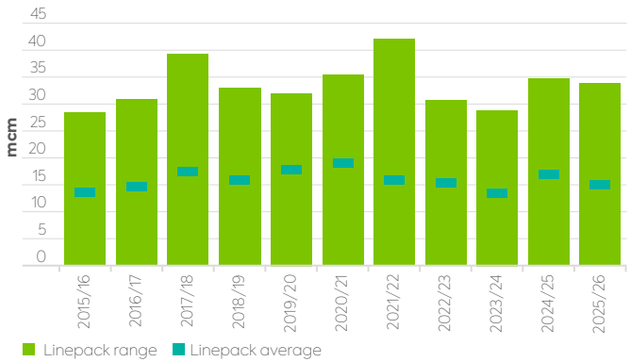
During daily periods of peak demand (typically in the morning and early evening), demand often significantly outstrips supply, with the shortfall being supplied by the system linepack, which is then able to replenish during lower demand periods (such as overnight).

The linepack within the system is regularly utilised by our customers to flex their supply and demand profiles during the day. On the days where there is a high level of linepack swing, additional use of our compressors is needed to maintain gas pressures across the system.

Reliable and resilient assets are therefore crucial in ensuring we can manage linepack variability throughout the day and continue to move gas to where it is needed, all whilst ensuring system pressures are managed within safe operating limits.

Read more about linepack utilisation on our highest demand day on the next page.

Figure 12
Linepack utilisation



This graph represents the maximum and average linepack swing, allowing for comparison across the years.

Highest demand day

Spotlight

The highest daily demand during winter 2025/26 was 407 mcm/d which occurred on 5 January. This was slightly higher than the max of 392 mcm/d the previous winter.

The breakdown of demand on 5 January day can be seen in table 5, alongside the peak 1-in-20 demand. This highlights that most demands on 5 January were lower than the peak 1-in-20, as you would expect. The exception to this is gas demand for electricity generation, which was slightly higher.

The 1-in-20 day represents the highest total demand on the system we could expect to occur once every 20 years. It does not capture the maximum demand for each of the demand elements. For power, there are many factors which can impact demand other than temperature, this can result in very high power demands right across the winter even when other demands are closer to normal conditions.

There are a few factors that made 5 January an interesting day:

- Demand changed significantly between 4 and 5 January 2026, increasing by 70 mcm/d (21%). The most significant change in demand between the 2 days was for gas demand for electricity generation which increased by 42 mcm/d (70%). This highlights the importance of the role that gas plays in electricity generation.
- Total NTS supplies were 7 mcm lower than demand at the end of the day, this level of imbalance is a small percentage of total demand and is not unusual.
- At certain points within the day supplies were 30 mcm/d lower than demand, meaning that 30 mcm/d of linepack was utilised (figure 13).
- During this day we used both operational and commercial tools to manage the constraint and maintain safe operating pressures across the network. More information can be found here in our January National Gas Energy Forum (NGEF). You can also read more about the operational and commercial tools available to us.

The points above illustrate why it's imperative to have a flexible and resilient network, so that varying supply and demand patterns can be met.

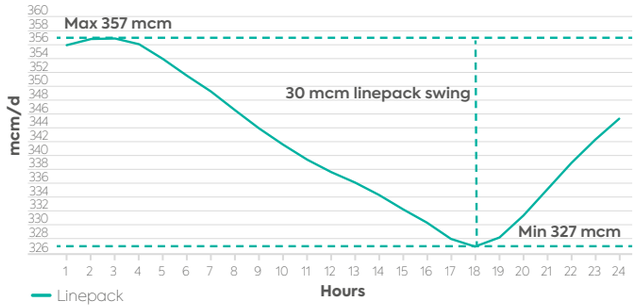
Table 5
Demand breakdown for 05/01/26 compared with peak 1-in-20 demand

mcm/d	1-in-20 peak demand	2025/26 highest demand day	% of 1-in-20 demand
NDM	311	255	82%
DM & Industrial	33	22	67%
Electricity generation	98	103	105%
Exports to Ireland	39	27	68%
Total demand	482	407	84%

Table 6
Actual demand for 04/01/2026 and 05/01/2026

mcm/d	04/01/2026	05/01/2026	% Change
NDM	233	255	9%
DM & Industrial	19	22	18%
Electricity generation	61	103	70%
Exports to Ireland	25	27	9%
Exports to continental Europe	0	0	0%
GB storage injection	0	0	0%
Total NTS demand	337	407	21%

Figure 13
Linepack 05/01/26



Preparing for winter

Scenarios for the coming winter

Preparing for the coming winter

Scenarios for the coming winter

We have included scenarios in our Winter Outlook publication for the past few years to help show how the NTS would balance under different supply and demand conditions. We are planning to continue to use them in our 2026/27 Winter Outlook publication, as we believe they have been a useful addition for our customers and stakeholders.

We intend to use the same base scenarios for this winter (shown in the table), refining them based on what we have learnt from recent winters. We'll also consider any other intelligence we gather ahead of publishing the Winter Outlook in full.

Given the conflict in the Middle East and the disruptions to global LNG supplies we are planning to explore some of the potential impacts of this in sensitivities to the scenarios. If there are other sensitivities you would like to see reflected in our scenarios, please do get in touch.

Scenarios	Rationale
Scenario 1: Typical winter (2019/20)	We simulate demand based on the weather experienced in 2019/20 as being representative of the daily demand we expect in a typical winter.
Scenario 2: Cold winter (2010/11)	We simulate 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 demand throughout the majority of winter.
Scenario 3: Cold snap (2017/18)	We simulate 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 in the last 10 years, and this period is the most recent example of market tightness.

We are keen to incorporate specific sensitivities based on stakeholder feedback, and would be pleased to hear of anything you'd like us to consider. Get in touch with us.

Preparing for the coming winter

As a prudent system operator, we do many activities to ensure our network is ready for winter.

During the summer when demand is typically lower, we undertake planned, routine maintenance activities on our assets. For summer 2026 we plan to undertake maintenance activities on 460 miles of pipeline and all our compressor stations. More detail on the work we're undertaking can be found in our Maintenance plan.

In addition to these maintenance activities, we also carry out many other winter preparedness activities. Some examples include:

- monitoring completion of all essential maintenance ahead of winter
- completing assessments at all compressor sites to ensure we have the right asset spares in the right places
- ensuring support contracts are in place for support with essential machinery, should there be an asset failure
- reviewing standby/call-out rotas to ensure key sites are able to be manned 24 hours if required
- carrying out assurance tests at all compressor sites, ensuring operational issues are resolved before the higher winter demand period
- consistently monitoring offshore outages, LNG cargo deliveries and both GB and EU storage positions
- Regular engagement with the Distribution Network Operators.

During the winter period, we work closely with the Department for Energy Security and Net Zero (DESNZ), Ofgem, and NESO to continually monitor supply and demand patterns, as well as assess any potential scenarios and associated risks that may arise.

We have published our preliminary safety monitor publication for winter 2026/27, this defines the level of gas storage that must be maintained across the country through the winter period. The focus of the 'safety monitor' is public safety, rather than security of supply.

Contact us

Consultation questions

Industry engagement

Consultation questions

We've set out some questions below that we'd really like to hear your thoughts on:

1. **Do you find this publication useful?**
2. **Do you have any insights from winter 2025/26 you can share with us?**
3. **Is there anything specific that you would like to see included in our scenarios?**
4. **Is there anything that you are concerned about for this coming winter?**
5. **What else would you like to see in our future publications?**

Please get in touch if you would like to share your thoughts on any of these points, or anything else.

We'd be delighted to hear from you.

Industry engagement

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

The National Gas Energy Forum (NGEF) is open to all energy stakeholders – a key event to share insights, operational information, collaborate and plan for the future of the UK energy sector.

The forum agenda varies from month to month depending on requests, operational events, and where we are in the gas year. We will continue with themed forums, which will be hybrid events held online and in London, as well as our online only events, and will also continue to cover key standing items. The dates for our next National Gas Energy Forums are available below.

You can find details about the forums, and how to sign up to attend them on our website.

Upcoming 2026 NGEF
- **18 June: London and online**
- **16 July: Online only***
- **10 September: Online only***
- **15 October: London and online**

*Our online only meetings will be a mixture of different topics including sharing of operational information, updates on key projects or regulation changes and feedback sessions, depending on what is happening at the time of the event.

Your feedback is so important to us

Letting us know what you think of the information we share with you, and how we're sharing it, helps us shape our future communications to ensure we're communicating what matters most, in a way that suits you. Send us an email to share your views and feedback on our publications.

For any press enquiries

Please get in touch with our Corporate Affairs team.

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

www.nationalgas.com

Further information on demand

LDZ Non-daily metered demand

What did we expect?

– A slight increase in weather corrected demand (circa 1%) based on the assumption that energy prices would be similar to the previous winter.

What did we see?

– Actual non-daily metered demand was about 3% lower than the previous winter, due to a combination of warmer weather and consumers choosing to use less gas.

Figure 14
Non-daily metered daily demand

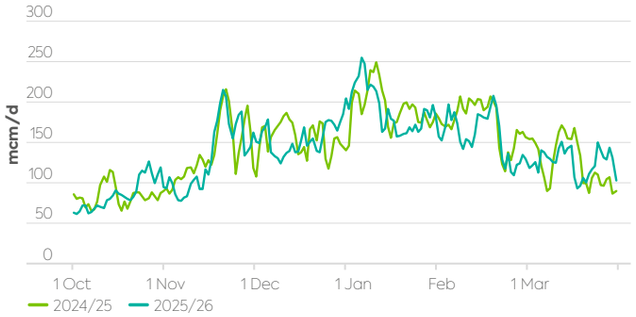
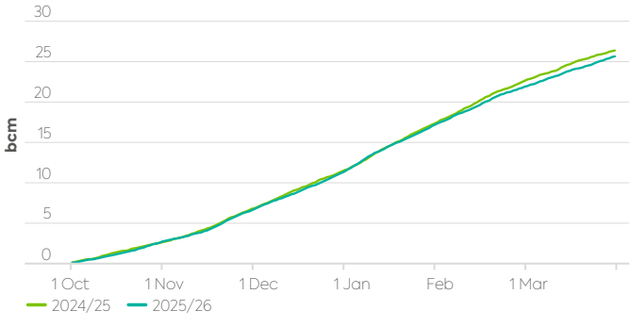


Figure 15
Non-daily metered cumulative demand



Industrial and Daily metered demand

What did we expect?

– Similar flows to the previous winter.

What did we see?

– DM & Industrial demand was slightly lower than the previous winter. The impacts vary from site to site, with some reductions in demands and some closures of plants but other sites showing little change from the previous winter.

Figure 16
Industrial and Daily metered daily demand

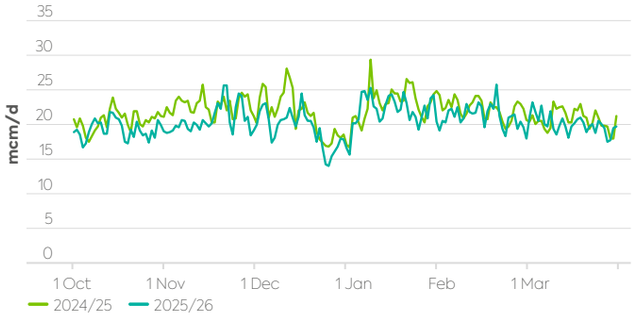
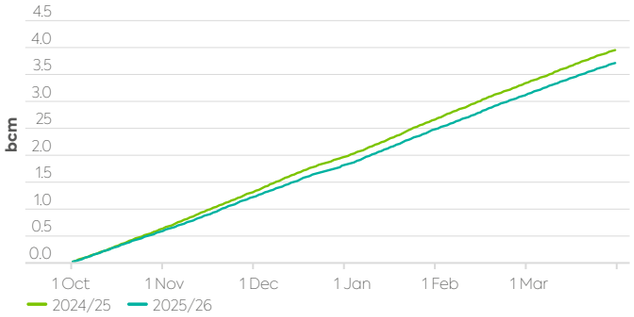


Figure 17
Industrial and Daily metered cumulative demand



NTS demand for electricity generation

What did we expect?
– A slight reduction in the total demand for winter due to the continued increase in renewable generation.

What did we see?
– As expected, demand was in line with the ongoing trend of year-on-year decline.
– Demand was significantly lower than the previous winter. Last winter's elevated demand was influenced by colder temperatures, reduced wind output and a decline in coal-fired generation, all of which increased reliance on gas demand for electricity generation.

Figure 18
Gas demand for electricity generation daily demand

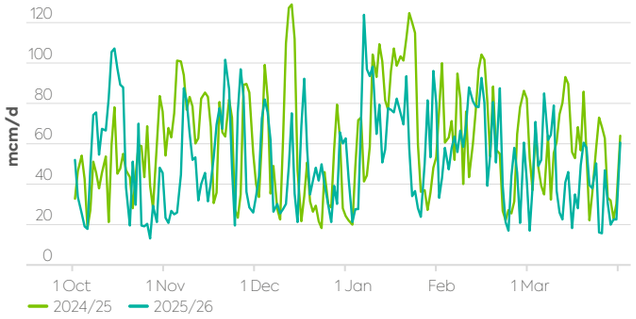
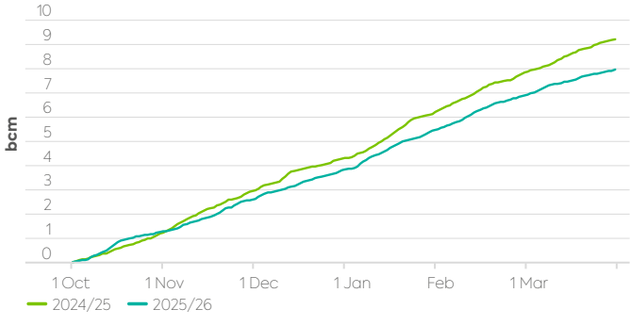


Figure 19
Gas demand for electricity generation cumulative demand



Exports to Ireland

What did we expect?
– A similar level of demand when compared with the previous winter.

What did we see?
– Actual demand was in line with previous winters.

Figure 20
Exports to Ireland daily demand

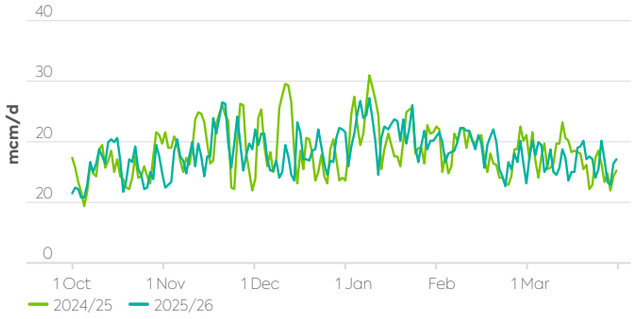
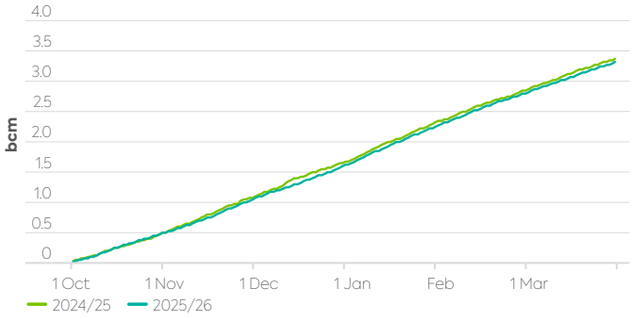


Figure 21
Exports to Ireland cumulative demand



Exports to continental Europe

What did we expect?

– A lower level of exports (0.3 bcm) when compared to the previous winter (0.4 bcm) as exports were expected to continue to return to more normal levels post the energy crisis.

What did we see?

– Significantly higher exports (1.4 bcm), largely driven by Great Britain's demand being generally lower across the winter, coupled with supplies being healthy.

Figure 22
Exports to continental Europe daily demand

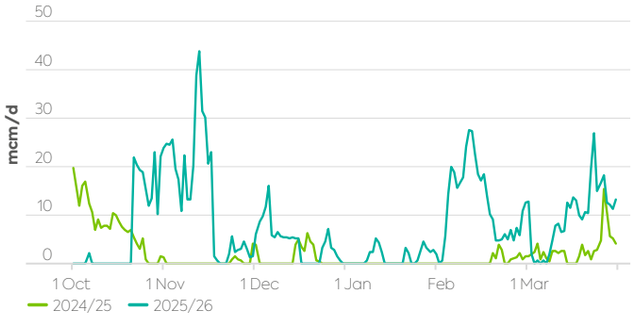
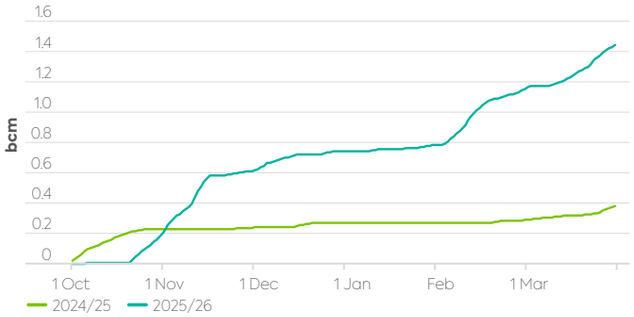


Figure 23
Exports to continental Europe cumulative demand



Storage

GB storage facilities behaved as expected, providing flexible supplies on to the NTS when needed. This was particularly evident during the cold weather in January (figure 24).

GB storage played a crucial role over winter, providing supply flexibility (driven by market signals) during periods of high demand and then re-filling during lower demand periods.

On 5 and 6 January, storage delivered over 70 mcm/d. These were the two highest demand days of the winter at 407 mcm/d and 377 mcm/d.

Storage stocks for winter 2024/25 and 2025/26 are comparable. The level of % storage fullness was similar on both 1 November and 1 March for the past two winters.

Figure 24
GB storage withdrawals

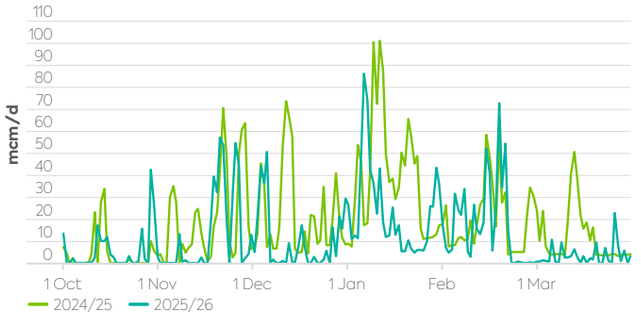


Figure 25
GB storage stock levels

Further information on supply

UKCS supply

What did we expect?

– Steady flows of circa 80 mcm/d, which is slightly lower than the previous winter as UKCS production continues to decline.

What did we see?

– Average daily flows of 82 mcm/d.
– Production decline was therefore circa 3%, rather than the 6% forecast.

Figure 26
UKCS daily supply

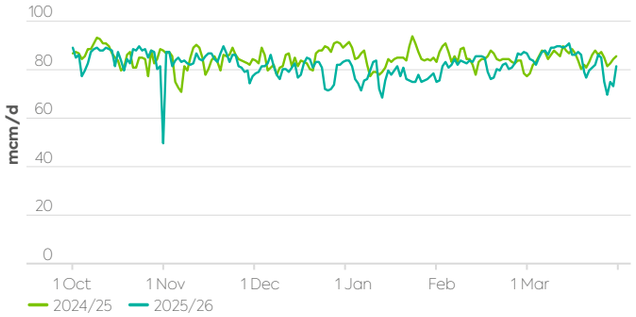
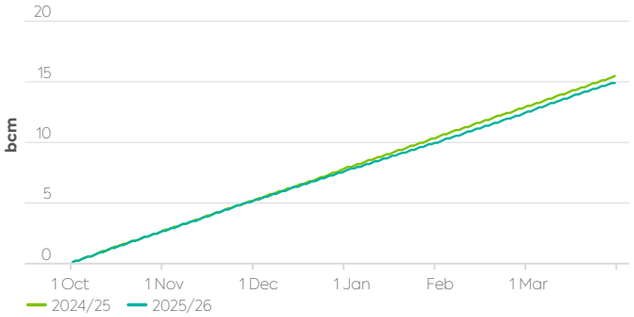


Figure 27
UKCS cumulative supply



NCS supply

What did we expect?

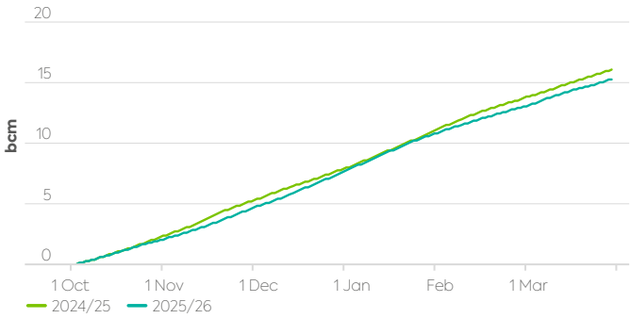
– Steady flows of circa 89 mcm/d, which is comparable to the previous winter.
– Higher flows to Great Britain when the price favours Great Britain over continental Europe.

What did we see?

– Average daily flows of 84 mcm/d, which is broadly in line with the forecast.
– Slightly lower flows were reflective of good supply availability throughout the winter.
– During periods of high demand we saw flows increase to similar levels when compared to the previous winter.

Figure 28
NCS daily supply

Figure 29
NCS cumulative supply



LNG supply

What did we expect?
- LNG to be the primary source of flexible supply, with the overall level highly dependant on the level of demand.
- Flows of circa 58 mcm/d.

What did we see?
- As expected LNG supplied high flows during the cold snap in January.
- Supplies of LNG were 0.7 bcm higher than the previous winter.
- Actual flows of 62 mcm/d, reflecting the good availability of LNG.

Figure 30
LNG daily supply

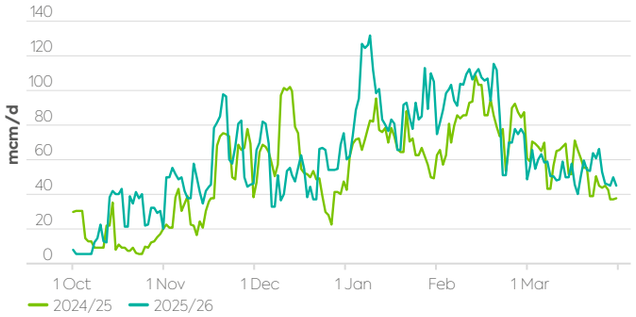
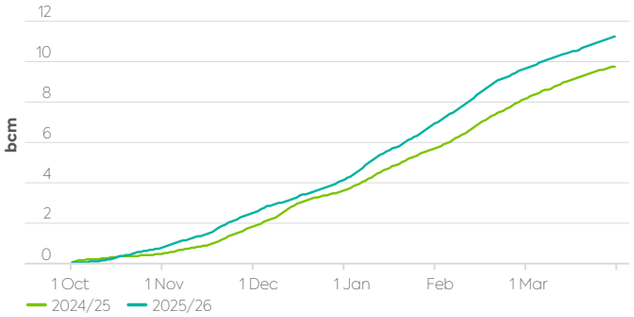


Figure 31
LNG cumulative supply



Imports from continental Europe

What did we expect?
- A low level of imports similar to the previous winter.
- Higher levels of supplies on some days in response to market signals, either due to cold weather or making up for short term changes to other supplies.

What did we see?
- Lower levels of imports than seen over the previous winter, but in line with historic trends.

Figure 32
Daily imports from continental Europe

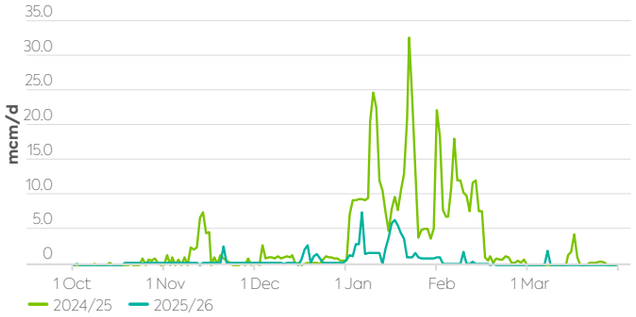
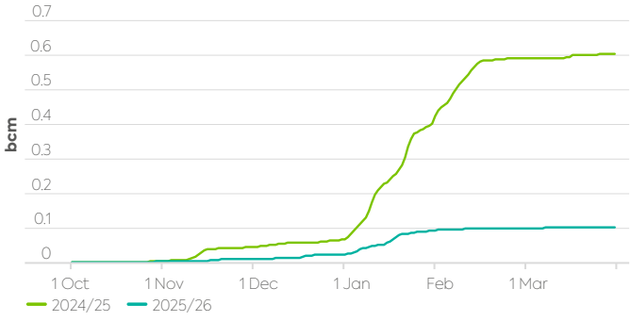
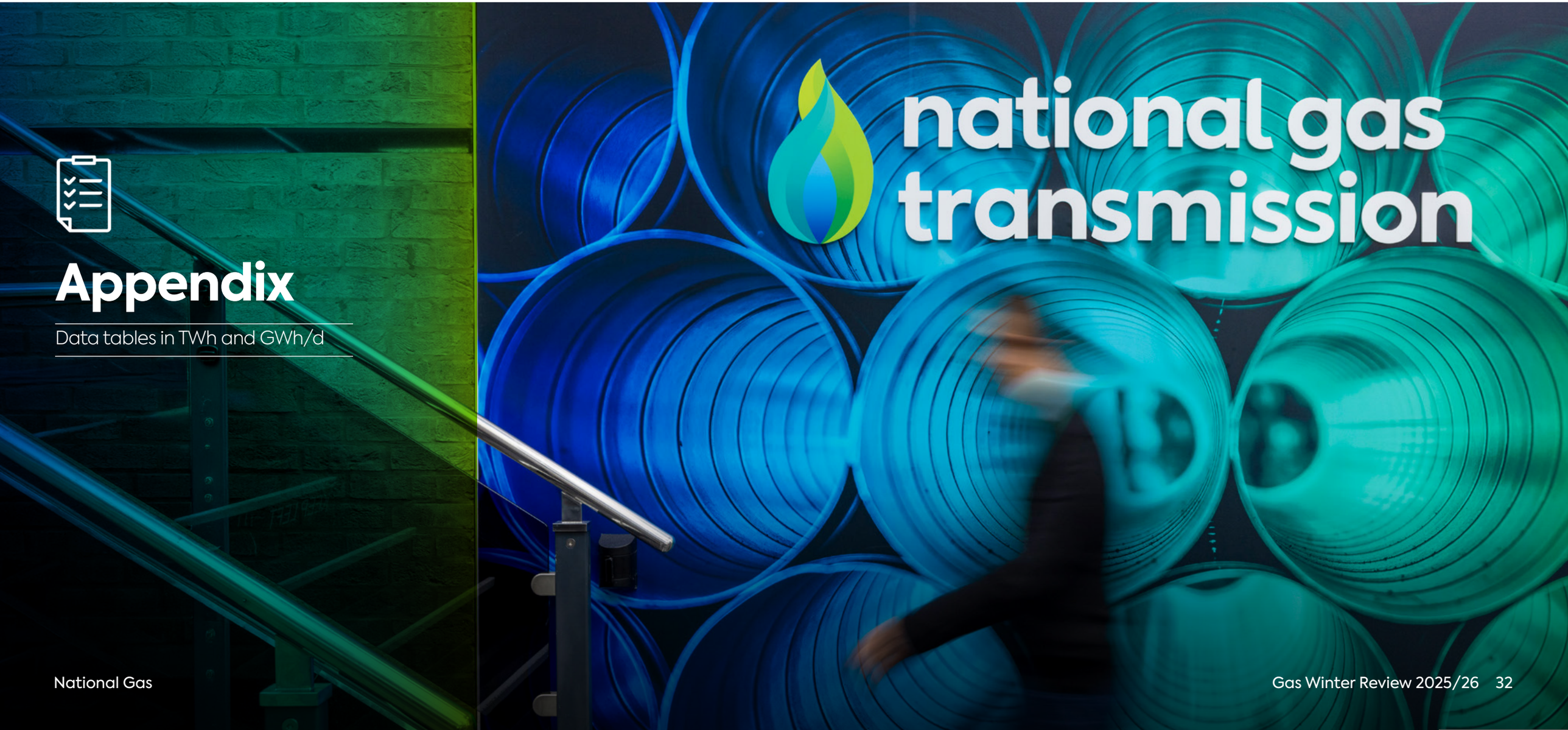


Figure 33
Cumulative imports from continental Europe





Appendix

Data tables in TWh and GWh/d

Appendix – Data tables in (TWh) and GWh/d

Table A
Demand summary (weather corrected)

Demand (TWh)	2024/25 weather corrected demand	2025/26 forecast	2025/26 weather corrected demand
NDM	296	299	290
DM & Industrial	45	48	41
Electricity generation	102	84	94
Great Britain's gas demand	443	431	425
Exports to Ireland	37	37	36
Exports to continental Europe	4	3	16
GB storage injection	26	23	23
Total NTS gas demand	510	493	500

Table B
Demand summary (actual demand)

Demand (TWh)	2024/25 actual demand	2025/26 actual demand
NDM	290	283
DM & Industrial	45	41
Electricity generation	102	88
Great Britain's gas demand	437	411
Exports to Ireland	37	36
Exports to continental Europe	4	16
GB storage injection	26	23
Total NTS gas demand	505	486

Table C
Min, max and average daily NTS gas demand for power for the last four winters

Winter (GWh/d)	Max	Avg	Min	Range
2021/22	1014.2	569.9	168.3	845.9
2022/23	1108.8	562.5	122.1	986.7
2023/24	1128.6	471.0	127.6	1001.0
2024/25	1181.4	557.3	169.4	1012.0
2025/26	1133.8	481.3	122.0	1011.8

Table D
Supply summary

Supply sources (TWh)	2024/25 actual	2025/26 forecast	2025/26 actual
UK Continental Shelf	169.6	159.7	164.0
Norway	176.9	176.4	168.6
LNG import	107.4	115.1	123.6
Imports from Continental Europe	6.6	6.6	1.1
GB storage withdrawal	38.8	30.0	24.1
Total	499.4	487.8	481.4

Notes:
A good guide for converting to energy in watt hours from gas volume in cubic metres is to multiply by 11. So, for example, 4 mcm approximates to 44 GWh/d, and 80 bcm approximates to 880 TWh.

Glossary

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, includes such things as compressors, pipelines, flow valves and regulators.

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

Composite Weather Variable (CWV)
The 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.

Compressor
Compressors are used to move gas around the transmission network through high pressure pipelines. There are currently 71 compressors at 24 sites across the country. 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
Two pipelines connecting Great Britain and the EU. The Interconnector (UK) Limited is a bi-directional gas pipeline connecting Bacton in the UK and Zeebrugge in Belgium. BBL is a bi-directional gas pipeline connecting Bacton in the UK and Balgzand in the Netherlands.

Daily metered (DM) demand
A classification of customers where gas meters are read daily. These are typically large-scale consumers.

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.

Linepack
The volume of gas stored within the National Transmission System at any time.

LNG
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.

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.

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.

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.

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.

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.

Glossary continued

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

Seasonal normal demand (SND)
The level of gas demand that would be expected on each day of the year. It is calculated using historically observed values that have been weighted to account for climate change.

Storage cycling
The process by which a gas storage facility injects and withdraws gas multiple times over a period.

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

Storage withdrawals
Gas which enters the NTS from a storage facility.

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

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
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.

Legal notice

National Gas Transmission has prepared this outlook document in good faith, and has endeavoured to prepare this document in a manner which is, as far as reasonably possible, objective, using information collected and compiled by National Gas Transmission from users of the gas transportation, together with its own forecasts of the future development of those systems.

While National Gas Transmission has not sought to mislead any person as to the contents of this document and whilst such content represents our best views as at the time of publication, readers of this document should not place any reliance on the contents of this outlook document.

The contents of this document must be considered as illustrative only and no warranty can be or is made as to the accuracy and completeness of such contents, nor shall anything within this document constitute an offer capable of acceptance or form the basis of any contract.

Other than in the event of fraudulent misstatement or fraudulent misrepresentation, National Gas Transmission does not accept any responsibility for any use which is made of the information contained within this outlook document.

Copyright

national gas

Securing Britain's Energy.

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

www.nationalgas.com