

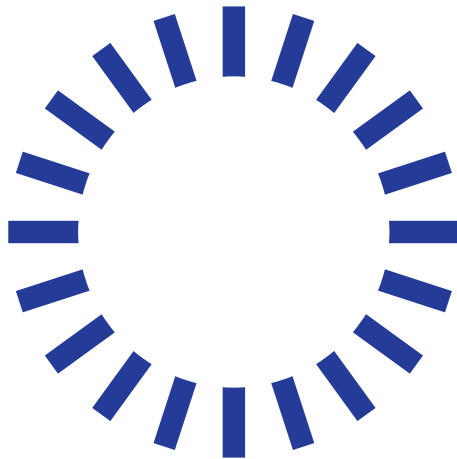
2025/26

Winter Outlook



Introduction

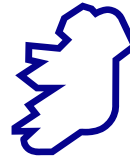
Gas Networks Ireland's Winter Outlook sets out the demand and supply outlook for winter 2025/26 (October 2025 to March 2026, inclusive) for both the Republic of Ireland (ROI) gas demand and the Gas Networks Ireland system demand. The Gas Networks Ireland system demand refers to the combined total demands for ROI, Northern Ireland (NI) and Isle of Man (IOM) which are all transported through Gas Networks Ireland's system.



Key messages

The Corrib gas field is expected to meet

13.9% of
Republic of Ireland
(ROI) gas demand
during winter 2025.



The remaining gas demand will be met by:

Imports from Great Britain (GB) via the Moffat Entry Point

(85.7%)

A small contribution
(0.4%)
from biomethane



The available combined entry point capacity (Moffat, Corrib and Biomethane) have sufficient capacity to meet forecasted peak total system demands over winter 2025/26.

The share of renewable gas in the network is set to increase over the coming years.

ROI gas demand for winter 2025/26 is forecast to be approximately

4.5% higher
than the same
period in 2024/25.

- This outlook indicates sufficient gas supply sources and network capacity for the winter ahead, based on the current gas demand projections and the available supply capacity. The following table outlines the breakdown in supply sources alongside the peak day forecasts for the winter ahead.

Table 1: Summary of forecasts for Winter 2025/26

Parameter	ROI only	Full System (ROI/NI/IOM)
Share of supplies for forecast winter 2025/26 demand	Indigenous Supply ¹ : 14.3%, Moffat 85.7%	Indigenous Supply: 10.5%, Moffat 89.5%
Share of supplies for 1-in-50 peak demand	Indigenous Supply: 7.1%, Moffat: 92.9%	Indigenous Supply: 5.2%, Moffat: 94.8%
1-in-50 peak day demand forecast	325.5 GWh/d	441.3 GWh/d
Average winter peak day demand forecast	284.5 GWh/d	378.2 GWh/d

- Ahead of winter 2025/26, completion of works at Brighthouse Bay Compressor Station combined with a review of the operational and technical capacities at the Moffat Entry point has resulted in an increased entry capacity from 35 mscm/d (385 GWh/d equivalent) to 39 mscm/d (433.4 GWh/d² equivalent)³.
- It is not currently envisioned that there will be any disruption to the availability of gas imports to Ireland from Great Britain (GB) this winter which is supported by National Gas's Winter Outlook⁴.
- Biomethane injection to the gas grid currently provides low levels of supply to the network. Biomethane is expected to grow to a larger share of indigenous supply in the medium term. Relative to last year, production is expected to increase up to c. 126 GWh over the winter period.
- Gas Networks Ireland encourage gas shippers to nominate on a timely basis throughout the day to encourage efficient compressor station operation and allow for more flexibility in the broader system to deal with changes in gas flow.

¹ Indigenous supply includes supply from the Corrib gas field and biomethane injection into the network

² 433.4 GWh/d is the current contractual maximum entry capacity at Moffat with National Gas.

³ A further upwards revision to the contract are in the process of being finalised.

⁴ National Gas are the operator of the GB gas transmission network.

Supply and Demand Overview

The 2025/26 Winter Outlook report sets out Gas Networks Ireland's analysis and view of the adequacy of the gas network for the coming winter (covering the period from October 1st, 2025 to March 31st, 2026). The gas supply position is dependent on both the availability of gas supplies and on the system's ability to transport gas to the end user.

Winter Period: historic and forecast

Historic Winter 2024/25 Supply and Demand

In winter 2024/25, 17.0% of ROI gas demand was met by indigenous supply sources while imports from Moffat accounted for the remaining 83.0%.

Indigenous supply sources accounted for 12.3% of Gas Networks Ireland winter 2024/25 system demand while Moffat provided the balance of supply of 87.7%.

Overall, ROI gas demand for winter 2024/25 was 3.2% higher than the previous winter period, largely driven by the increase in gas demand for power generation and I&C sector.

In the Power Generation sector, gas demand was 13.8% higher in winter 2024/25. This was primarily driven by lower wind generation.

The winter period 2024/25 saw a decrease of 4.9% in Residential sector gas demand. Average temperatures across winters 2023/24 and 2024/25 were similar, implying this decrease was not tied to variations in temperature sensitive demand due to weather and

was potentially due to an increase in energy efficiency and a change in customer behavioural habits.

In the Industrial and Commercial sector, gas demand increased by 3.6% compared to the previous winter period. This is in part driven by an increase in the number of Industrial and Commercial customers in 2024/25.

Gas demand for transport increased by 97.6% in winter 2024/25 vs. the previous year, equating to a demand of 29 GWh.

Indigenous supply sources accounted for 10.4% of Gas Networks Ireland system peak day gas demand in 2024/25, while imports from Moffat accounted for the balance of 89.6%.

The ROI peak day gas demand for winter 2024/25 occurred on the 8th of January 2025 with a demand of 274.4 GWh/d. Demand on this peak day was driven by the power generation sector, accounting for 59% of gas demand, with Industrial and Commercial and Residential demand accounting for 22.5% and 17.9% of demand respectively. On this day, gas-fired power generation accounted for 63.5% of the SEM fuel mix, with wind generation accounting for 11.4% and imports via the East-West Interconnector accounting for 8.3% of demand. While the 8th January 2025 was a cold day with an average temperature of -2°C, this did not correspond to a severe 1-in-50 weather event where an average temperature of closer to -8 °C would be expected.

The 8th January 2025 was also the winter peak day for Gas Networks Ireland system demand. Total Gas Networks Ireland system demand on the peak day was 365.6 GWh/d with demand for ROI, NI and IOM of 274.4 GWh/d, 85.8 GWh/d and 5.4 GWh/d respectively. However, the peak day for IOM was on the 9th with a demand of 5.7 GWh/d. It is important to note that winter 2024/25 peak day demand represents both the all-time ROI and system demand peak. Prior to this,

the highest peak day demand was the winter 2022/23 peak day which had demands of 261.9 GWh/d and 345.7 GWh/d for ROI and system demand respectively.



Forecast Winter 2025/26 Supply and Demand

Table 2 below presents the following forecasts for 2025/26 gas demand:

- 1-in-50 and average peak day system demand forecasts
- Total winter 2025/26 demand

In formulating the Winter Outlook projections, the following are considered: fuel and carbon price futures, available installed generation capacity, planned power station outages and possible forced outages. The outlook also considers expected changes in gas customer numbers, and the weather-dependent portion of demand is calculated based on an average weather year, with average temperatures and wind conditions.

Overall, ROI gas demand is expected to increase by 4.5% for winter 2025/26 vs. the previous year. This increase is driven by an expected increase in both power generation and Industrial and Commercial gas demand of approximately 6.1% and 4.4% respectively.

Electricity demand is forecast to increase this winter. Whilst electricity imports are expected to increase compared winter 2024/25 with the full inclusion of the Greenlink interconnector over the winter period and anticipated higher renewable power generation, winter 2025/26 power generation gas demand is expected to be almost 6% higher than last year to compensate for both the overall increase in electricity demand and Moneypoint’s exit from the wholesale electricity market as of June 2025. The forecasted power generation mix now excludes Moneypoint as the three 3 coal-fired units have been designated as Retained Existing Units (REU) which provide

Security of Supply services only. Such units will only be dispatched when it is evident that market-based measures alone are not sufficient to prevent a further deterioration of the electricity supply⁵.

Ahead of winter 2025/26, a review of the operational and technical capacities has allowed for a revised Moffat capacity from 385 GWh/d up to the National Gas contractual capacity of 433.4 GWh/d⁶ in order to meet increasing peak day demands as forecast in Gas Network Ireland’s recent 10 Year Network Development Plans.

Gas supply forecasts for winter 2025/26 indicate that for a 1-in-50 peak day, Moffat would be required to operate at just under 96.5% of revised technical flow capacity to meet Gas Networks Ireland system demand. An average winter peak day it would require 81.9% of revised technical capacity to meet Gas Network Ireland system demand.

Table 2: Projected Gas Demand and Supply for Winter 2025/26

	1-in-50 Peak Day 25/26 (GWh/day)	Avg Year Peak Day 2025/26 (GWh/day)	Winter total 2025/26 (TWh)
ROI Demand	325.5	284.5	32.0
System Demand ⁷	441.3	378.2	43.3
Corrib Supply	23.1	23.1	4.4
Biogas Supply	0	0	0.1
Moffat Supply (System)	418.2	355.1	38.8
System Supply	441.3	378.2	43.3
Moffat Supply for ROI	302.4	261.4	27.5



⁵ EirGrid Winter Outlook 2025/26
⁶ The Moffat Entry Point has a technical capacity of 39 mscm/d
⁷ The Gas Networks Ireland system demand refers to the total demand transported through the Gas Networks Ireland system, i.e. the combined demands for ROI, Northern Ireland (NI) and Isle of Man (IOM)



Winter Historic 2024/25 vs Forecast 2025/26

The following table gives a summary of the actual gas demand and supplies for winter 2024/25 and also gives a forecast for winter 2025/26.

Table 3: Historic and Forecast gas demand and supply for gas years 2024/25 and 2025/26.

Parameter	Winter 2024/25	Winter Forecast 2025/26	% Forecast change
ROI Demand	30.6 TWh	32.0 TWh	4.5%
System Demand	42.3 TWh	43.3 TWh	2.5%
ROI share of supplies	Indigenous Supply: 17.0%, Moffat: 83.0%	Indigenous Supply: 14.3%, Moffat 85.7%	
System share of supplies	Indigenous Supply: 12.3%, Moffat: 87.7%	Indigenous Supply: 10.5%, Moffat: 89.5%	

The forecast increase in both ROI and System gas demand of 4.5% and 2.5% respectively is primarily driven by a forecast increase in the Power Generation sector of 6.1%, owing to the higher electricity demands forecast for the gas year ahead.

Corrib and biomethane are the two remaining indigenous gas supply sources. Corrib supply capacity continues to decline with supply capacity of 24.4 GWh/d projected for Winter 2025/26, down from 28.2 GWh/d in Winter 2024/25 (-15.6%). Biomethane injection to the gas grid currently provides low levels of supply (c. 15.0 GWh p.a.) to the gas network. Over the coming years, biomethane's contribution is expected to grow to a larger share of indigenous supply, supported by a national target of 5.7 TWh of biomethane production by 2030.

Operational Outlook for Winter 2025/26

Gas Networks Ireland strives to maintain a steady flow profile at the Moffat Interconnection Point in particular. Physical limitations coupled with late nomination/re-nomination behaviour can prevent this from always being the case.

Shipper actions that aid Gas Networks Ireland in this regard include:

- ensuring nominations and re-nominations are accurate and timely;
- avoiding large within day imbalances; and
- operating in accordance with the flow nomination information provided to Gas Networks Ireland.

In addition to the occurrence of 1-in-50 winter peak day demands, another factor which needs to be considered regarding system flexibility is the energy content of the gas imported via Moffat. The revised technical capacity of Moffat (39 mscm/d) provides 433.4 GWh/d of import capacity based on a GCV of 40 MJ/scm.

Gas Networks Ireland are proactively investing in upgrading and maintaining the existing infrastructure in the compressor stations in Scotland. These upgrade and maintenance works are only carried out during time periods where there is sufficient redundancy available to ensure there is no risk in supply not meeting demand.

Gas Networks Ireland maintains under review the necessary physical, commercial and market-based tools to manage a supply and demand imbalance, including those relating to a gas emergency, should it occur.

Gas Networks Ireland continually reviews its ability to prevent, withstand and recover from disruptions

that could threaten the availability of natural gas. Our emergency preparedness also includes review and learning from severe weather events such as Storm Eowyn even if there was no loss of gas supply to any customer during this storm. Exercises are an important part of our ongoing review of emergency arrangements and learnings from this feed into energy sector emergency planning. GNI participated in EirGrid's Exercise Atlantic on the 18th of September as a member of the Joint Energy Emergency Response Team (JEERT) which simulated the response and recovery from an unplanned electricity blackout. On the 13th, 14th and 21st of October, GNI participated in the annual Network Emergency Coordinator (NEC) industry assurance exercise in Great Britain (GB) called Exercise Glacier. This exercise simulated a significant reduction of gas supply to Ireland from Moffat which is managed in accordance with the Natural Gas Emergency Plan (NGEP).

Commercial Arrangements

Gas Networks Ireland monitors transmission system imbalances resulting from shipper balancing activities on a daily basis. Ongoing increased liquidity on the Marex Spectron Trading Platform allows Gas Networks Ireland to trade out system wide imbalances in an efficient manner. With Europe now entering another winter with reduced Russian pipeline flows, gas price volatility remains a potential risk for the foreseeable future, with the possibility of impacting near-term gas demand, and subsequently shipper booking strategies. As a result of this, Gas Networks Ireland is encouraging shippers to maintain balanced positions intra-day and we expect that imbalance charges will encourage shippers to do so.





Upstream Security of Gas Supply

Great Britain

Gas Networks Ireland looks to National Gas' Winter Outlook to inform our outlook for the upcoming winter season. With approximately 89.5% of the GNI system demand expected to be met by imports from Scotland via the Moffat Entry Point, upstream security of gas supply is particularly important when assessing the gas supply outlook for the winter ahead.

There is no significant forecasted change to the supply quantities available to GB, and hence to Ireland, for winter 2025/26 compared to the previous year. Ireland accounts for approx. 7% of total GB demand. The outlook for Ireland indicates sufficient gas supply sources and network capacity to meet the anticipated demand projections over the coming winter, including in the case of a 1-in-50 year winter peak.

Supplies from the UK Continental Shelf (UKCS) and Norway are expected to provide steady baseload supplies to GB, with Liquefied Natural Gas (LNG), GB gas-storage and interconnection with Europe providing flexible supplies to meet demand. LNG is expected to remain as the primary source of flexible supply.

The GB supply margin between forecast peak supply and 1-in-20 peak demand is 83 mcm/d for the winter ahead, reduced from a margin of 127 mcm/d forecast for winter 2024/25. This reduced margin is due to decreasing GB indigenous gas production and fewer imports available from the EU, combined with an increase in forecasted demand of 8 mscm/d (to 482 mscm/d) (+2% year-on-year). While this is a decrease in the margin for

the winter ahead vs. winter 2024/25, the GB supply position remains positive and reinforces a positive supply position for Ireland for the coming winter.

Europe

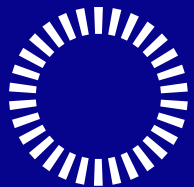
Gas supply to Europe has remained uninterrupted despite continued elevated geopolitical tensions since the Russian invasion of Ukraine, aided significantly by EU-driven diversification efforts and demand-reduction strategies.

Under the current regulations, Member States are mandated to refill underground gas storage (UGS) to at least 90% of their working gas volume between 1st October and 1st February (under normal market conditions) and the aggregated European UGS stock level reached 83.04% (~948.12 TWh) as of 3rd November⁸. Although this is somewhat below the 94% level achieved at the same period in 2024 (~1082 TWh / ~98 bcm), it still underscores a robust buffer of stored gas. In all ENSTOG Winter Supply Outlook 2025/26⁹ scenarios, the European gas system is expected to conclude the winter period with underground gas storage (UGS) levels exceeding 30%, even in the event of a complete disruption to Russian pipeline supplies.

In parallel, infrastructure expansion and import diversification continue. The regasification and LNG-receiving capacity in Europe has increased, with recent data showing regasification capacity rising from ~20.08 million mt to ~21.15 million mt by end-2024, representing a significant build-out. Meanwhile, LNG flows to Europe in H1 2025 rose ~21% year-on-year, aligning with the shift away from Russian pipeline volumes.

⁸ European Gas Flow dashboard by ENTSOG

⁹ ENTSOG Winter Supply Outlook 2025/26



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