Gas Networks Ireland

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2026 Summer Outlook

Introduction

Gas Networks Ireland's Summer Outlook sets out the demand and supply outlook for summer 2026 (April to September 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 demands for ROI, Northern Ireland (NI) and Isle of Man (IOM) which are all transported through Gas Networks Ireland's system. It is designed to inform the energy industry on the anticipated status of the gas system over the period, to assist the industry in preparing for the summer months.

1 **NDM - Non-Daily Metered (Where the Annual Quantity is < 5,500,000 kWh).**
2 **The Moffat Entry Point has a current technical capacity of 433 GWh/day and supplies gas to ROI, Northern Ireland, and Isle of Man.**
3 **ENTSOG Summer Supply Outlook 2026.pdf**
4 **National Gas Summer Outlook 2026**

Key messages

The Corrib gas field is expected to meet

14.8% of Republic of Ireland (ROI) gas demand during summer 2026.

The remaining gas demand will be met by:

Imports from Great Britain (GB) via the Moffat Entry Point[2]

(85.2%)

A small contribution

(<0.1%)

from biomethane

The share of renewable gas in the network is set to increase over the coming years with the commissioning of new entry points.

ROI gas demand for summer 2026 is forecast to be approximately

3% lower than the same period in 2025.

This is driven by the following forecasted trends by sector:

Power generation:

7%

decrease.

DM I&C:

5%

increase.

NDM[1]:

4%

increase.

Transport:

58%

increase.

Upstream planned maintenance is scheduled at Corrib from 24th August to 25th September 2026, resulting in no gas supply from this entry point during these works.

This scheduled work is not expected to impact Gas Networks Ireland's ability to meet customer demand, with imports from GB expected to provide 100% of supply.

The upstream supply outlook is positive for summer 2026, which is supported by both ENTSOG's[3] and National Gas Transmission's[4] (GB TSO) summer outlooks on supply for Europe and Great Britain respectively.

In particular, Great Britain's diverse gas supply sources support National Gas Transmission's positive outlook for supply to Ireland.

Demand comparison

Figure 1 compares the historical and forecast demands for summer 2025 and 2026 respectively for the NDM, DM I&C[5] and the power generation sectors.

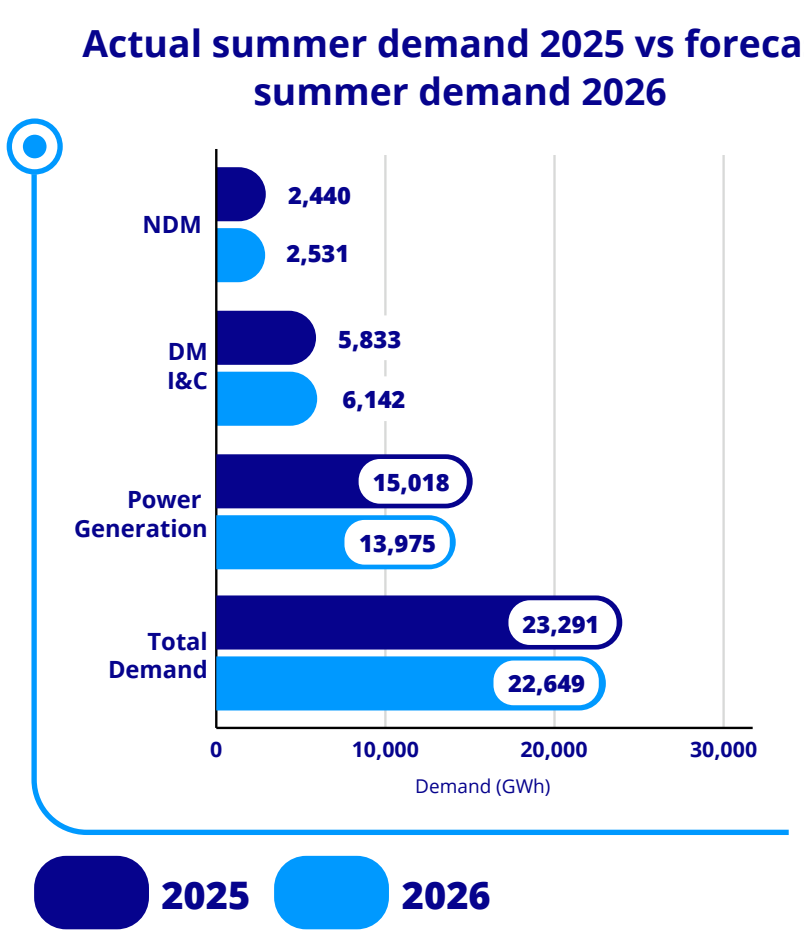

Figure 1: Actual summer demand 2025 vs forecast summer demand 2026

Supply comparison

Figure 2 compares the historical and forecast supply sources for summer 2025 and 2026 respectively.

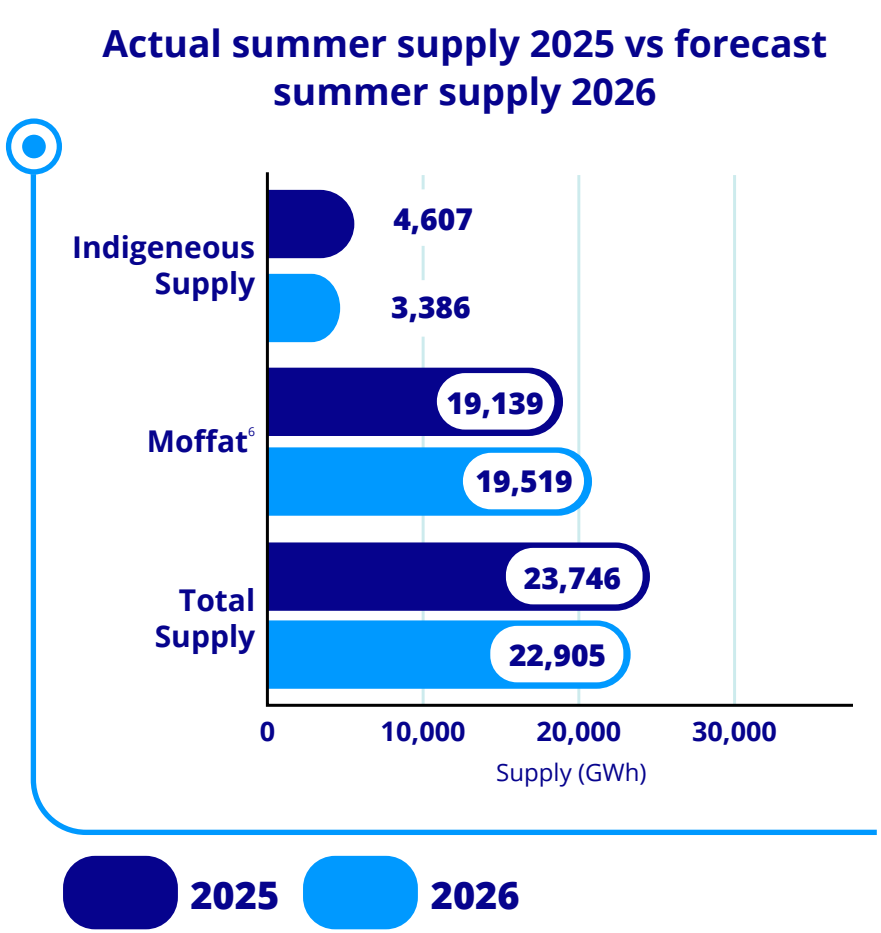

Figure 2: Actual summer supply 2025 vs forecast summer supply 2026

5 **Includes transport sector**

6 **Supply at Moffat is not limited to this value and will depend on actual demand. The supply capacity at Moffat is currently c. 433 GWh/d.**

Summer 2025 gas supply

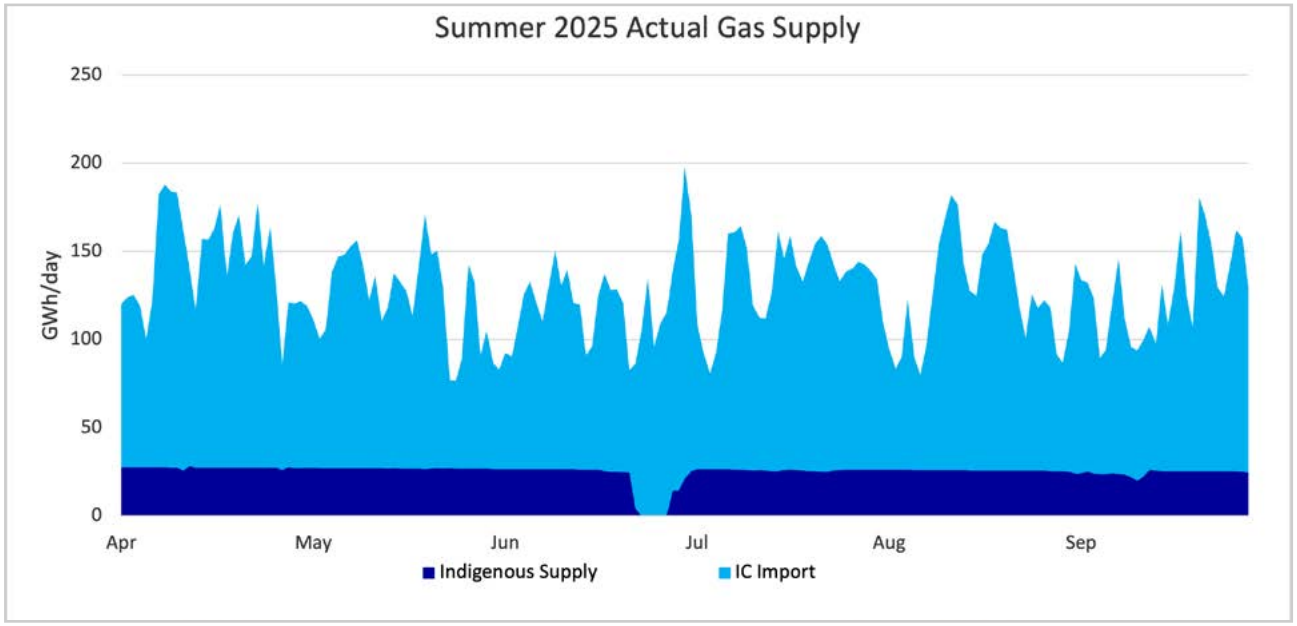

Figure 3: Summer 2025 actual gas supply

Figure 3 shows actual gas supply sources during the summer 2025 period. Indigenous supply sources accounted for 19.4% of total ROI demand, with the Moffat Entry Point supplying the remaining 80.6%.

Table 1: Summer 2025 actual gas supply by source (GWh)

Moffat	Corrib	Biomethane	Total ROI supply
19,139	4,600	7	23,746

Summer 2025 gas demand

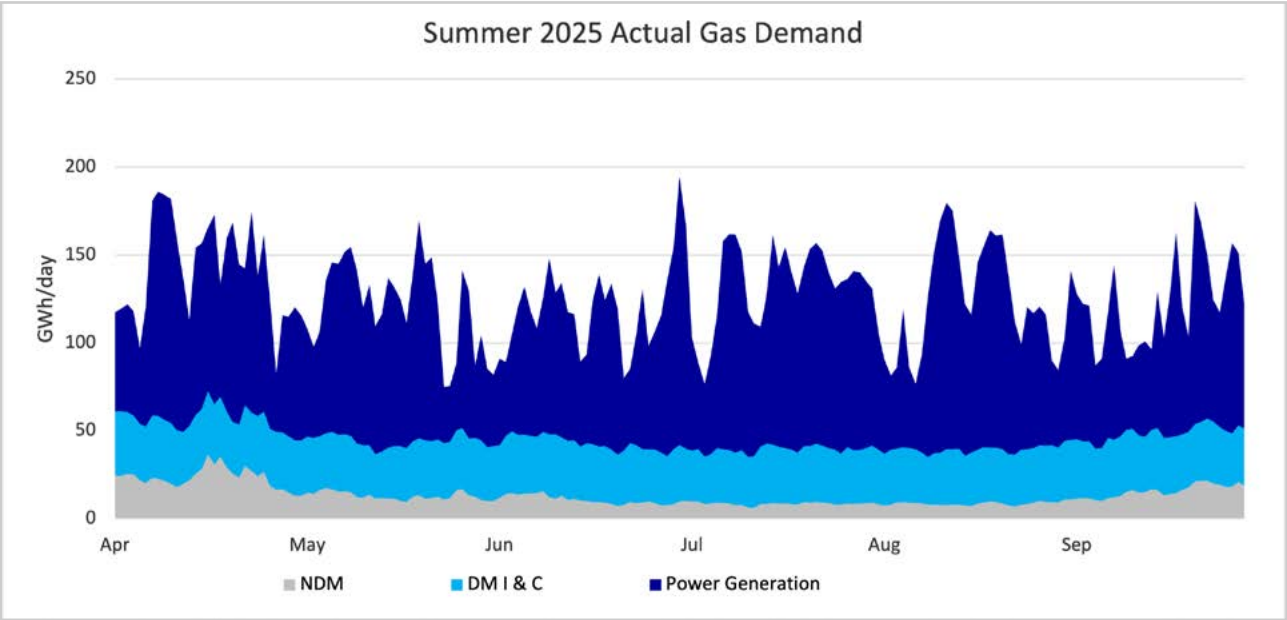

Figure 4: Summer 2025 actual gas demand

Figure 4 shows that the power generation accounted for 64.5% of the total demand for summer 2025, followed by 25% and 10.5% for DM I&C and NDM respectively. The transport sector accounted for 23 GWh which is included in DM I&C demand.

Table 2: Summer 2025 actual gas demand by sector (GWh)

Power generation	DM I & C	NDM	Total ROI demand
15,018	5,833	2,440	23,291

Summer 2025 ROI power generation fuel mix

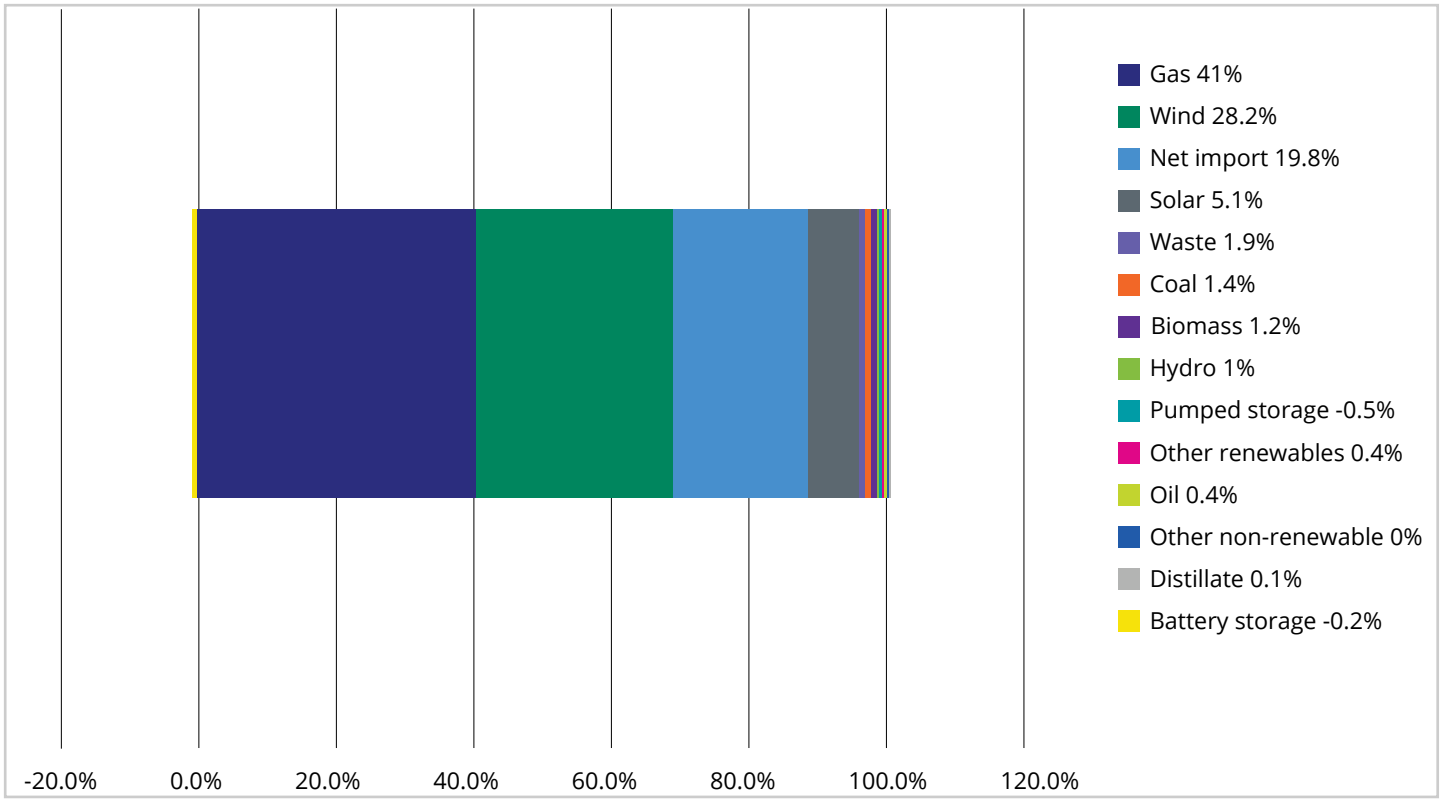

Figure 5: Summer 2025 ROI power generation fuel mix

Figure 5 shows the power generation Fuel Mix for ROI for summer 2025[7]. Gas-fired generation accounted for the highest share (41%) of the ROI power generation fuel mix, demonstrating its important role in providing baseload power to the electricity market.

During summer 2025, wind generation supplied 28.2% of Ireland's electricity demand, similar to its contribution of 27.9% for the same period in 2024. ROI was a net importer of electricity across the summer 2025 period, with net imports accounting for 19.8% of demand. In summer 2024, the contribution of net imports to the fuel mix was 18.4%.

The flexibility of gas-fired generation continues to compliment both the intermittent nature of wind generation and the intra-day changes in the electricity demand profile.

7 Data taken from EirGrid's monthly circulation of the IE fuel mix by Outage Planning dept

Summer period 2026 forecast supply position

Corrib and biomethane are the remaining indigenous gas sources, with Corrib being the dominant indigenous gas source. The maximum forecasted supply[8] from Corrib during this period is 22.7 GWh/day. Hence, the Corrib gas field is anticipated to operate at just 22% of its initial peak production (103.9GWh/d) level for the summer ahead. The Corrib gas field is forecast to meet 14.8% of ROI demand during the summer period. The balance of gas demand will be met by imports via the Moffat Entry Point (85.2%), with a small contribution (<0.1%) made by biomethane. Biomethane production was 7 GWh during the summer of 2025, with similar volumes forecast for this summer. The share of renewable gas in the network is set to grow over the coming years with the commissioning of new entry points expected in gas year 2026/27.

14.8%

of ROI demand forecast during the summer period is due to be met by The Corrib gas field.

8 **The supply scenario represents maximum daily supply capacities at indigenous sources. Actual supply profiles on a given day may differ from the maximum daily scenario.**

Summer period 2026 forecast demand

ROI gas demand for summer 2026 is forecast to be approx. 3% lower than for the same period in 2025. This is primarily driven by a forecast decrease in gas demand in the Power Generation sector of 7%. NDM demand is expected to increase by 4% while DM I&C is forecast to increase by 5%. Gas demand for transport is predicted to be 36 GWh, a 58% increase on demand in summer 2025.

The contribution of gas towards the electricity fuel mix is sensitive to electricity market conditions. The forecast merit order is directly influenced by planned and forced generator outages, forecast fuel prices and the electricity price spread between GB and Ireland influencing the magnitude and direction of electricity imports and exports. Projected gas demand for power generation is also highly dependent on weather conditions, which influences renewable generation.

The forecast decrease in gas demand in the Power Generation sector this summer is as a result of a forecast increase in renewable generation in summer 2026 vs. the previous year. However, if renewables were to be constrained by the electricity network in line with 2025 levels, this would likely cause an increase in gas-fired generation in the fuel mix.

For summer 2026, Gas-fired generation is forecast to account for 34.3% of ROI's power generation fuel mix, providing baseload power to the electricity market.

Wind generation is forecasted to supply 34.8% of the fuel mix of Ireland's electricity demand, compared to 28.2% for the same period in 2025. ROI is projected to be strongly net importing electricity across the summer 2026 period, with net imports projected to account for 17.2% of demand. Electricity Demand is forecast to increase by approximately 10% in summer 2026 compared to 2025.

Approx 3%

Lower ROI gas demand for summer 2026 is forecast

Forecast summer 2026 power generation fuel mix

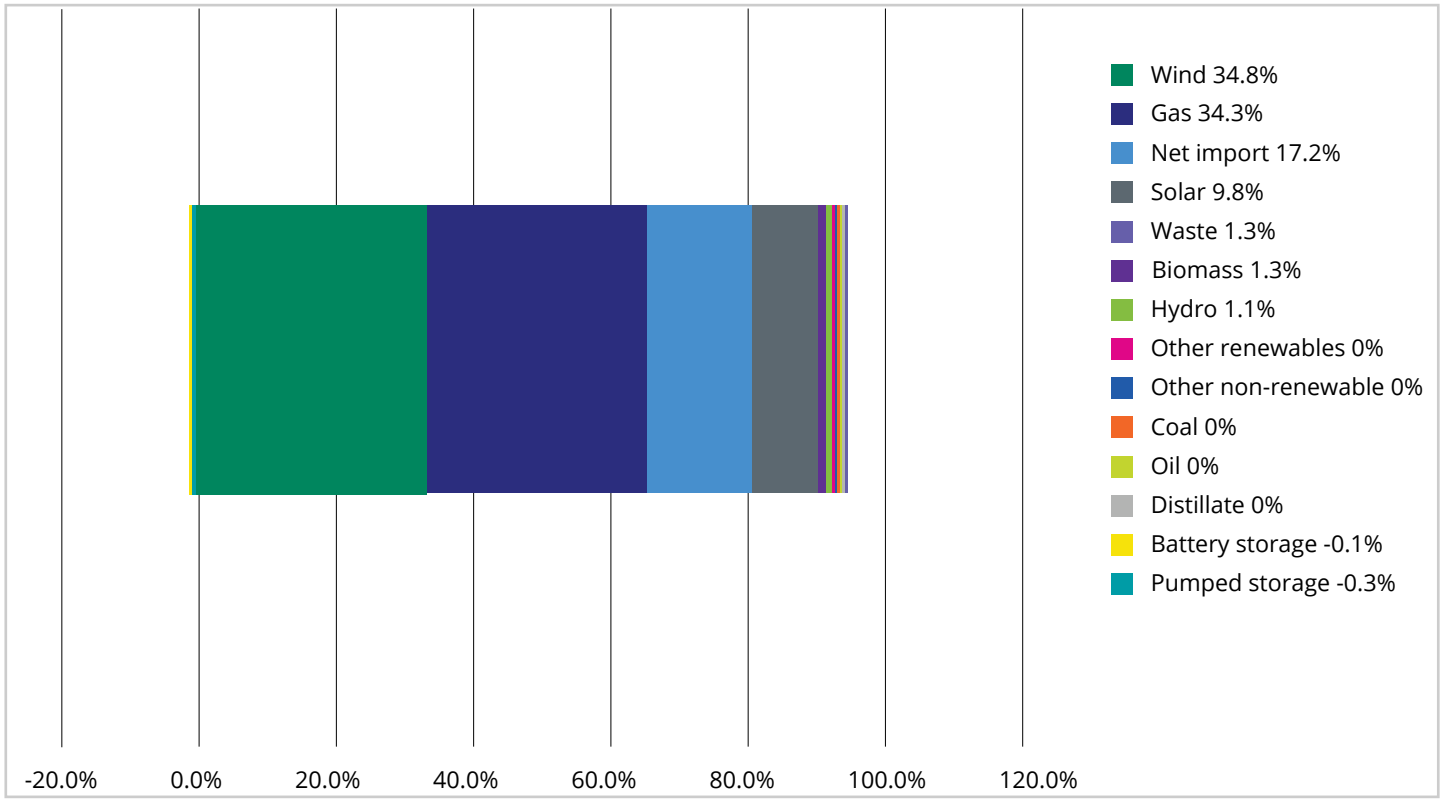

Figure 6: Forecast ROI power generation fuel mix for summer 2026

Figure 6 shows the projected fuel mix for the summer ahead.

NDM sector gas demand is seasonally lower in the summer months due to being largely weather-driven.

Demand in this sector is expected to be 4% higher in summer 2026 compared to 2025 due to the forecast weather conditions being colder than the comparitively milder summer 2025.

DM I&C demand is also forecast to increase slightly due to growth in demand linked to economic growth.

Forecast ROI protected customer demand, total ROI gas demand and Corrib supply

Figure 7 below illustrates that the indigenous natural gas supply from Corrib is expected to meet the forecasted demand from protected customers[9] for the majority of the summer period. The balance of gas demand will be met via imports from Moffat. During the month-long planned maintenance works at Corrib in August/September, imports via Moffat are expected to meet 100% of demand.

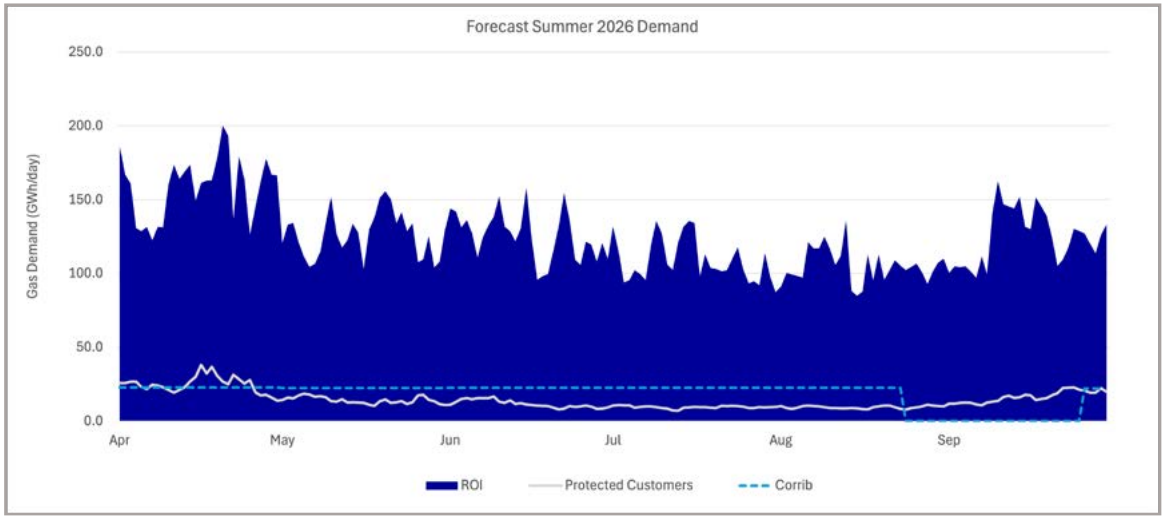

Figure 7: Forecast ROI protected customer demand, total ROI gas demand and corrib supply

9 Ireland's protected customers are defined as all non-daily metered sector customers, and in addition, priority customers in the daily metered sector, which include hospitals, nursing homes, retirement homes, high security prisons and district heating systems.

Gas system operability

Gas Networks Ireland monitors transmission system imbalances as a result of shipper balancing activities on a daily basis. The Marex Spectron Trading Platform allows Gas Networks Ireland to trade out system wide imbalances in an efficient manner. It is important that shippers are aware of the negative impact of not maintaining individual balanced positions, i.e. high balancing costs for Gas Networks Ireland that inevitably are paid for by the shippers. The 3.5% of the System Average Price that is levied as a charge against the Shippers for imbalances also serves as an appropriate incentive to Shippers to appropriately balance their portfolios.

Planned summer maintenance activities

Upstream of the Gas Networks Ireland transmission system, the following table summarises scheduled maintenance works for the summer ahead, as advised by gas producers/connected system operators. During these works, the affected Entry Point will provide no gas supply to the network, with imports from Moffat expected to provide 100% of demand.

Table 1: Scheduled summer maintenance upstream of entry points

Entry point	Scheduled upstream maintenance	Period	Duration (days)
Corrib	Planned Maintenance	24th Aug - 25th Sep 2026	32

Upstream security of gas supply

Although gas prices stabilised during 2024 and 2025, price volatility has returned in 2026, largely driven by constraints in global LNG markets and geopolitical upheaval such as the Middle East conflict.

Despite market volatility, Ireland's physical gas supplies have remained secure and continue to benefit from a reliable twinned interconnector system with GB. GB itself maintains a diverse and resilient supply mix and is expected to have sufficient supply to meet demand under normal operating conditions during summer 2026 according to National Gas Transmission's Summer Outlook 2026..

Great Britain is expected to remain a net exporter of gas to continental Europe, particularly during the summer period when domestic demand is lower. Supply in GB is forecast to be met primarily from UK Continental Shelf (UKCS) production and Norwegian imports, with the balance supplied by LNG and storage withdrawals. LNG imports are expected to increase in summer 2026, by around 65% compared to 2025, reflecting higher demand and the need for flexibility within the system.

At a European level, looking at ENTSOG's latest summer outlook, the transition away from Russian pipeline gas has continued, with the EU largely replacing these volumes with LNG imports and Norwegian gas. However, reduced LNG availability, particularly linked to disruptions in Qatar and transport constraints, has tightened global markets, contributing to higher prices and intensified competition for LNG between Europe and Asia.

Regarding storage, EU gas inventories entered April 2026 at approximately 28% full, significantly lower than in recent years due to a colder winter in much of Europe and higher withdrawal rates.

Despite this lower starting point, analysis indicates that European infrastructure and supply flexibility are sufficient to refill storage to around 90% by the end of summer 2026, provided LNG imports are maximised and injection begins early.

However, sensitivity scenarios highlight continued risks. In a scenario of limited LNG availability, EU storage levels may reach only ~76% by the end of September 2026, demonstrating the critical importance of securing sufficient LNG supplies.

If combined with further disruptions (e.g. reduced pipeline imports), storage levels could fall further, increasing the potential for tighter conditions heading into winter.

Data Freeze

In order to complete the detailed analysis required to produce this document, the input data was defined in April 2026, based on the most up to date information available at the time.

Disclaimer

Gas Networks Ireland has followed accepted industry practice in the collection and analysis of data available. However, prior to taking business decisions, interested parties are advised to seek separate and independent opinion in relation to the matters covered by this Summer Outlook and should not rely solely upon data and information contained therein. Information in this document does not purport to contain all the information that a perspective investor or participant in the Republic of Ireland's gas market may need.

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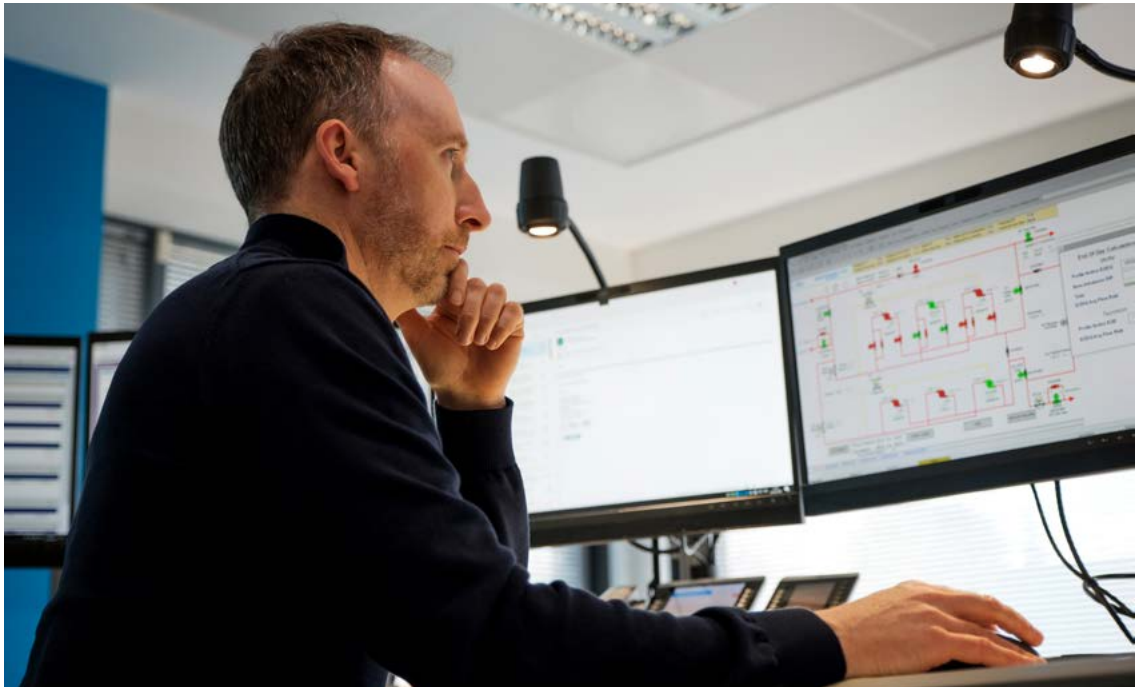

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