national gas

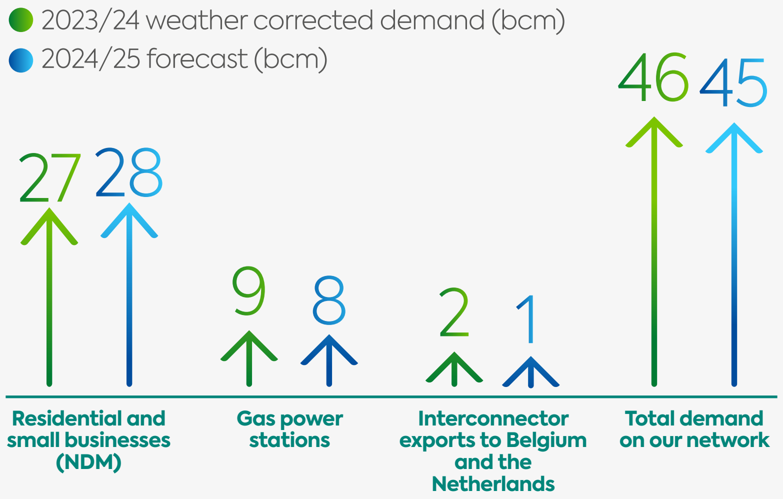
Securing Britain's Energy.

# Gas Winter Outlook

## October 2024

Overview

## Key statistics




"As we approach winter, we have confidence in the country's diversity of supply options and the capability of our network to meet peak demand.

We will continue collaborating with industry and government to enhance energy resilience through careful monitoring and management of gas supply and demand.

We are fully committed to the government's net zero targets and our network can play a leading role in delivering cutting-edge technologies like low carbon hydrogen and carbon capture."

Ian

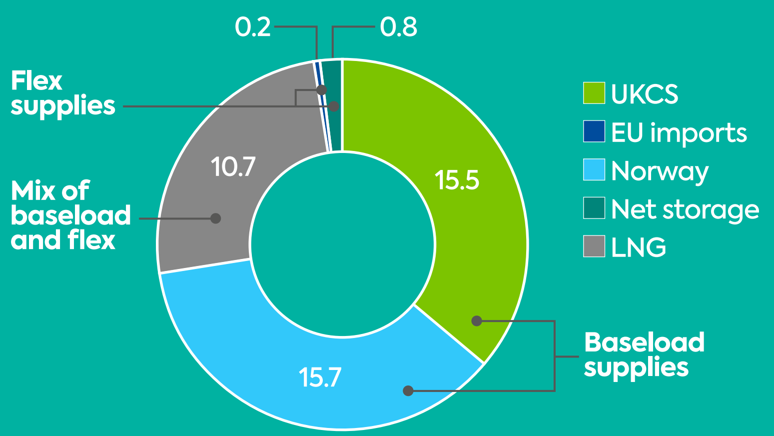
**Ian Radley,**
System Operations Director

Securing Britain's Energy.

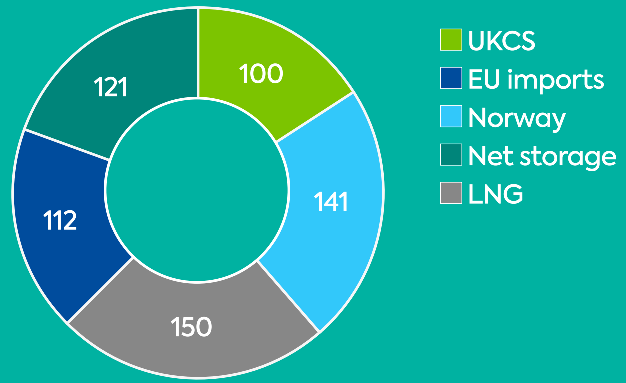
## Supply

- Steady baseload supplies are provided by the UK Continental Shelf (UKCS) and Norway with flexible supplies predominantly coming from Liquified Natural Gas (LNG), along with GB storage and imports from continental Europe.
- When we look at supplies over the whole winter the baseload sources provide over half the total supply with LNG imports providing most of the rest. But when we consider the maximum capability for each supply source the breakdown is distributed more evenly, highlighting the flexibility and resilience of GB gas supply.

### Total gas supply for winter 2024/25 (bcm)




### Daily supply capability (mcm/d)



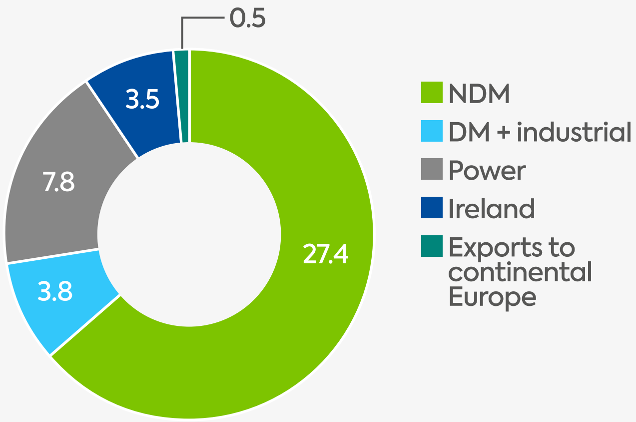

## Demand

- Non Daily Metered (NDM), which is mostly homes and small businesses, is forecast to increase slightly based on the assumption that household energy prices are slightly lower when compared with last winter. Despite the fall in price household energy prices are still high by historical standards so we would expect many of the energy saving techniques to continue limiting the increase in demand.
- Exports to continental Europe are expected to reduce this winter given that the EU have strong levels storage (94% full as of 23rd September) and additional import capabilities.
- Gas demand for Power is forecast to reduce slightly this winter as increased renewables come online. We do expect to see high maximum daily demands, as was the case last winter, with gas-fired power stations coming on-line to help balance the electricity system when the wind doesn't blow.

**Did you know?**

On 30 November 2023, gas provided 61% of electricity.

### Gas demand forecast 2024/25 (bcm)



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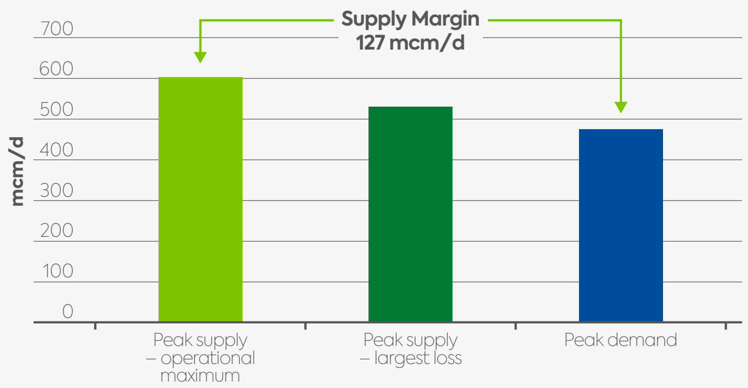
## Margins

The peak day demand, known as the 1-in-20 (the highest demand you could expect to see once in 20 years) for this winter is 474 mcm/d.

The peak supply capability is 601 mcm/d, meaning that we have a positive supply margin of 127 mcm/d.

We also undertake a test (known as the N-1), where we assess the event of losing our largest piece of infrastructure, which is 72 mcm/d. Even under these conditions we maintain a positive supply margin of 55 mcm/d.




# Find out more or get in touch

## Jake Tudge

**Contact Jake Tudge for any enquiries for our leadership team.**

**For general enquiries, please get in touch here.**

**You can find the full publication on our website.**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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**
Liquified 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.