Gas Networks Ireland

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Winter Outlook

2026/27



Introduction

Gas Networks Ireland's Winter Outlook sets out the demand and supply outlook for winter 2026/27 (October 2026 to March 2027, 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

12.4% of Republic of Ireland (ROI) gas demand during winter 2026.

The remaining gas demand will be met by:

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

(86.9%)

A small contribution

(0.7%)

from biomethane

The available combined entry point capacity (Moffat, Corrib and Biomethane) is sufficient to meet forecasted peak total system demands over winter 2026/27.

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

ROI gas demand for winter 2026/27 is forecast to be approximately

3.6% higher than the same period in 2025/26.

- This outlook indicates sufficient gas supply sources and network capacity for the winter ahead, based on the current projections for gas demand and 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 2026/27

Parameter	ROI only	Full System (ROI/NI/IOM)
Share of supplies for forecast total winter 2026/27 demand	Indigenous Supply[1] : 13.1%, Moffat 86.9%	Indigenous Supply: 9.5%, Moffat 90.5%
Share of supplies for 1-in-50 peak demand	Indigenous Supply: 6.9%, Moffat: 93.1%	Indigenous Supply: 5%, Moffat: 95%
1-in-50 peak day demand forecast	333.7 GWh/d	459.9 GWh/d
Average winter peak day demand forecast	282.8 GWh/d	368.0 GWh/d

- Ahead of December 2026, completion of works at Brighouse Bay Compressor Station, combined with a review of the operational and technical capacities at the Moffat Entry point, is expected to result in an increased entry capacity from 433 GWh/d to 450 GWh/d[2].
- 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 Outlook[3].
- Biomethane injection to the gas grid currently provides low levels of supply to the network. The share of biomethane in the supply mix is expected to grow this winter following the commissioning of two new direct biomethane connections and the central injection facility at Mitchelstown. Production is expected to increase up to c. 219 GWh for the winter period ahead.
- 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 GWh/d is the current contractually agreed maximum entry capacity at Moffat with National Gas. An increase in the maximum capacity limit to 450 GWh/d is in the process of being agreed and implemented for December 2026

3 National Gas are the operator of the GB gas transmission network. Gas Winter Outlook 2026 | National Gas

Supply and demand overview

The 2026/27 Winter Outlook report sets out Gas Networks Ireland's analysis and view of the adequacy of the gas network for the coming winter. 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.

Historic winter 2025/26 supply and demand

In winter 2025/26, 14.3% of ROI gas demand was met by indigenous supply sources while imports from Moffat accounted for the remaining 85.7%.

Indigenous supply sources accounted for 10.6% of Gas Networks Ireland winter 2025/26 system demand while Moffat provided the balance of supply of 89.4%.

Overall, ROI gas demand for winter 2025/26 was just 0.7% lower than the previous winter period. This trend was driven by a decrease in power generation gas demand of 2.8% combined with increases in both the Residential and Industrial and Commercial sectors of 4.2% and 0.5% respectively.

The decrease in power generation gas demand was primarily driven by higher electricity imports and wind generation compared to winter 2024/25.

Average temperatures across winter 2025/26 were slightly lower (-0.6%) than in 2024/25, contributing to higher residential gas demand.

In the Industrial and Commercial sector, gas demand increased slightly, by 0.5%, compared to the previous winter period. This is driven by an increase in demand from existing Industrial and Commercial customers in 2025/26.

Gas demand for transport decreased by 34.4% in winter 2025/26 vs. the previous year, equating to a demand of 19 GWh.

Historic winter 2025/26 peak day supply and demand

The ROI peak day gas demand for winter 2025/26 occurred on the 21st of November 2025 with a demand of 243 GWh/d. Demand on this peak day was driven by the power generation sector, accounting for 59.8 % of gas demand. The outage at Coolkeeragh power station on this day resulted in the dispatch of more gas-fired generation in ROI as a replacement to meet electricity demand. On this day, gas-fired power generation accounted for 61.8% of demand, with wind generation accounting for 27.7% and imports via the East-West and Greenlink Interconnector accounting for 5.3% of demand.

Industrial and Commercial and Residential demand accounted for 24.4% and 15.7% of peak day demand respectively. While the 21st November 2025 was a cold day, with an average temperature of 3°C, conditions were not consistent with those associated with a severe 1-in-50 weather event, for which average temperatures would be expected to be closer to -8 °C.

The 8th January 2026 was the peak day for Gas Networks Ireland system demand. Total Gas Networks Ireland system demand on this day was 321.8 GWh/d with demand for ROI, NI and IOM of 228.5 GWh/d, 76.6 GWh/d and 5 GWh/d respectively. The system peak day also coincided with the NI peak day while the peak day for IOM was on the 5th January with a demand of 5.7 GWh/d. The highest all-time peak day demand, which occurred in January 2025, for both ROI and the all-island system remains at 274.4 GWh/d and 365.6 GWh/d respectively. By comparison, Winter 2025/26 peak day demand was approximately 11% lower for ROI and 12% lower for the overall system, at 243.0 GWh/d and 321.8 GWh/d, respectively.



Forecast winter 2026/27 supply and demand

Table 2 below presents the following forecasts for 2026/27 gas demand:

- 1-in-50 and average peak day system demand forecasts
- Total winter 2026/27 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 total winter demand is calculated based on an average weather year, with average temperatures and wind conditions.

Overall, ROI gas demand is expected to increase by 3.6% for winter 2026/27 vs. the previous year. This increase is driven by an expected increase in both Power Generation and Industrial and Commercial gas demand of approximately 3.1% and 8.5% respectively.

Electricity demand is forecast to increase by 4.3% this winter. Electricity imports are expected to remain broadly unchanged compared to winter 2025/26, with an increase in both renewable generation and gas-fired generation expected to meet the overall increase in electricity demand. Growth in I&C demand for the winter ahead is related to expected growth in demand from newly-connected large Industrial and Commercial customers.

Ahead of December 2026, completion of works at Brighouse Bay Compressor Station, combined with a review of the operational and technical capacities at the Moffat Entry point, is expected to result in an increased entry capacity from 433 GWh/d to 450 GWh/d. This capacity increase will ensure that the 1-in-50 peak day demand forecast can be met should it occur this winter.

Gas supply forecasts for winter 2026/27 indicate that for a 1-in-50 peak day, Moffat would be required to provide 436.7 GWh/d to meet Gas Networks Ireland system demand, with indigenous sources providing supply of 23.2 GWh, comprising 21.8GWh from Corrib and 1.4GWh from biomethane. An average winter peak day would require imports equivalent to 344.8 GWh/d via Moffat, in addition to indigenous supply, to meet Gas Network Ireland system demand.

Forecast winter 2026/27

ROI Gas demand
↑ 3.6%

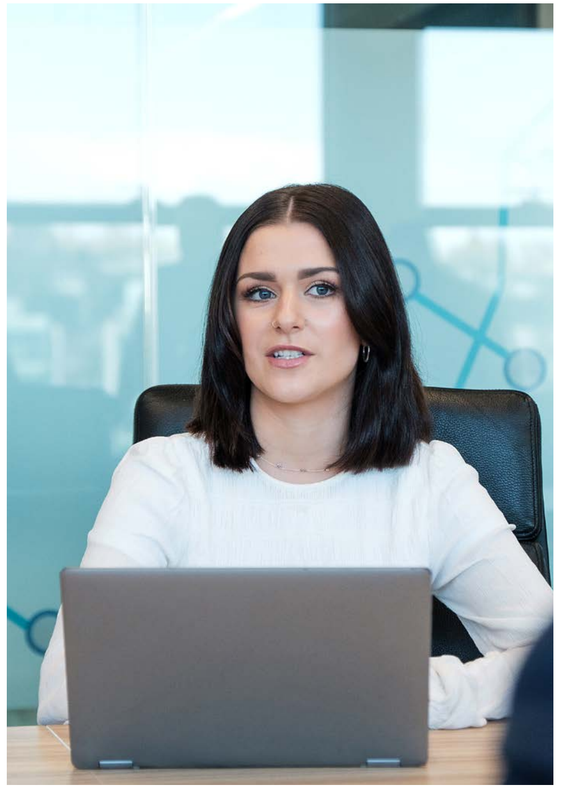
Electricity demand
↑ 4.3%

Power generation gas demand
↑ 3.1%

Moffat entry capacity increase to
↑ 450 GWh/d

Table 2: Projected Gas Demand and Supply for Winter 2026/27

	1-in-50 Peak Day 26/27 (GWh/day)	Avg Year Peak Day 2026/27 (GWh/day)	Winter Total 2026/27 (TWh)
ROI Demand	333.7	282.8	31.5
Total Demand	459.9	368.0	43.7
Corrib Supply	21.8	21.8	3.9
Biogas Supply	1.4	1.4	0.2
Moffat Supply (System)	436.7	344.8	39.5
System Supply	459.9	368.0	43.7
Moffat Supply for ROI	310.5	259.6	27.4



Winter historic 2025/26 vs forecast 2026/27 summary

The following table gives a summary of the actual gas demand and supplies for winter 2025/26 and also gives a forecast for winter 2026/27.

Table 3: Historic and Forecast gas demand and supply for gas years 2025/26 and 2026/27.

Parameter	Winter 2025/26	Winter Forecast 2026/27	% Forecast Change
ROI Demand	30.4 TWh	31.5 TWh	3.6%
System Demand	40.9 TWh	43.7 TWh	6.7%
ROI share of supplies	Indigenous Supply: 14.3%, Moffat: 85.7%	Indigenous Supply: 13.1%, Moffat 86.9%	
System share of supplies	Indigenous Supply: 10.6%, Moffat: 89.4%	Indigenous Supply: 9.5%, Moffat: 90.5%	

Corrib and biomethane are the two remaining indigenous gas supply sources. Corrib supply capacity continues to decline with a maximum supply capacity of 21.8GWh/d projected for Winter 2026/27, down from 23.9 GWh/d in Winter 2025/26 (-8.8%). Biomethane injection to the gas grid currently provides low levels of supply (c. 1.2 GWh p.a.) to the gas network. With the commissioning of two new biomethane entry points in 2026, combined with the commissioning of the CGI in Mitchelstown this winter, biomethane's contribution is expected to grow to provide 219 GWh of supply to the gas network for the winter ahead.

Operational outlook for winter 2026/27

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 provides 450 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.

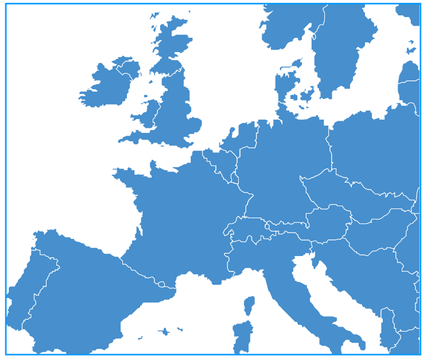
Gas Networks Ireland maintains under review the necessary operational and commercial tools to manage a supply and demand imbalance, including those relating to a gas emergency, should it occur.

Emergency exercises are an important part of our ongoing review of emergency arrangements and learnings feed into energy sector emergency planning. Gas Networks Ireland has already participated in several exercises throughout 2026 with energy industry stakeholders in Ireland, Northern Ireland and Great Britain. The exercise scenarios included distribution network load shedding and the interaction between the gas and electricity sectors. Most recently, Gas Networks Ireland participated in the NEC (Network Emergency Coordinator) Exercise Hydra on 12th October 2026. The exercise scenario tested the emergency load shedding arrangements for managing a Network Gas Supply Emergency (NGSE) in Great Britain, including the arrangements at the Moffat IP (Interconnection Point).

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, and with the ongoing disruption to Global LNG supplies in the Strait of Hormuz, gas price volatility will likely remain a substantial issue 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 would like to re-emphasise the importance of gas shippers maintaining 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 90.5% of the Gas Networks Ireland 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.

The National Gas Winter Outlook 2026 indicates that Great Britain (GB) is expected to have sufficient gas supply capability to meet forecast demand throughout winter 2026/27, with positive supply margins maintained even under severe stress conditions. This positive outlook continues to underpin Ireland's security of gas supply given its reliance on imports via the Moffat interconnector.

GB Gas supplies are expected to be supported by UK Continental Shelf production, Norwegian imports, LNG, storage facilities and continental interconnectors. LNG is forecast to play an increasingly important role in the supply mix as domestic production continues to decline.

The GB supply margin between forecast peak supply and 1-in-20 peak demand is 99 mcm/d for the winter ahead, increased from a margin of 83 mcm/d forecast for winter 2025/26. This increase is driven by increased supply capacity of LNG of 24mscm/d, negated to an extent by an increase in forecasted demand of 11 mcm/d (to 493 mcm/d, +2% year-on-year). With this increase in the supply margin for the winter ahead vs. winter 2025/26, 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 resilient despite ongoing geopolitical uncertainty and continued reliance on global LNG markets.

The ENTSOG Winter Supply Outlook 2026/27[4] reports that EU underground gas storage (UGS) facilities were approximately 72% full on 1 October 2026, below the 83% level recorded at the start of Winter 2025/26 and the lowest pre-winter inventory level seen since the energy crisis period. Lower storage inventories reflect a challenging 2026 injection season, higher and more volatile global gas prices, and stronger competition for LNG cargoes. Despite lower storage levels, ENTSOG concludes that European gas infrastructure remains sufficiently flexible to meet demand under reference winter conditions, supported by expanded LNG import capacity and diversified gas supply sources. However, the outlook highlights that maintaining strong LNG deliveries throughout the winter is critical to preserving storage stocks and supporting security of supply. Under tighter LNG availability scenarios, EU storage levels could fall significantly below historical norms by the end of the winter, reducing resilience to late-season cold spells and potentially complicating storage refilling during Summer 2027.

The principal risks to European security of supply remain prolonged cold weather, reduced LNG availability and major upstream supply disruptions. In cold winter scenarios, ENTSOG identifies the potential need for demand response measures in parts of Europe, particularly where storage inventories become heavily depleted. For Ireland, no direct physical gas supply concerns have been identified. However, Ireland's continued dependence on gas imports via Great Britain means the Irish market remains exposed to wider European gas market developments, particularly periods of tight LNG supply, low storage inventories and elevated wholesale gas price volatility.

In parallel, infrastructure expansion and import diversification continue. Europe increased its LNG import capacity by almost one-third between 2021 and 2025, with regasification capacity growing by 13% in 2023 and 8% in 2024. Further LNG terminal additions are expected to increase import capacity by around 6% in 2026 (approx. 356 bcm). While the EU aims to phase out Russian gas, imports of LNG from the country increased by 16% year-on-year in the first quarter of 2026[5].

4 ENTSOG Winter Supply Outlook 2026/27

5 European LNG Tracker | IEEFA

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