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## INES Releases November Update on Gas-Scenarios

**The gas storage facilities have been almost completely filled before the upcoming winter of 2024/25. The INES gas scenarios show that only extremely cold temperatures could pose challenges to the gas supply.**

The Initiative Energien Speichern e.V. (INES) presents an updated outlook for the upcoming winter of 2024/25 with the November update. The gas storage facilities were filled to over 98 percent by November 4, 2024. The significant temperature-related increase in gas consumption has not only prevented further filling but also required substantial withdrawals. If gas consumption remains at the current level or increases further, a complete refilling of the gas storage facilities is no longer expected.

The INES gas scenarios indicate that the early withdrawals in November are likely to have little impact on the winter outlook. With average to warm temperatures, the gas storage facilities will be moderately to extensively depleted in the winter of 2024/25. In both scenarios, the statutory fill level requirement of 30 percent on February 1, 2025, can be met. If extremely cold temperatures occur in the winter of 2024/25, the gas storage facilities will be completely depleted by mid-February 2025. Without the gas storage facilities, high gas consumption on individual very cold days can no longer be fully covered.

INES Managing Director Sebastian Heineremann comments on the November update as follows: *“It is not so much the upcoming winter of 2024/25, but rather the refilling of the gas storage facilities in the coming summer of 2025 that increasingly concerns the storage industry. The currently negative summer-winter spread raises concerns that price signals do not provide sufficient incentives for the market to refill. In light of the negative summer-winter spread, the effectiveness and cost-efficiency of the filling instruments from the Gas Storage Act should be reviewed and ensured.”*

### BACKGROUND ON THE INES GAS SCENARIOS:

INES continuously models the European gas markets to assess the security of gas supply. Based on this and considering the storage levels as of November 1, 2024, three scenarios for gas supply in Germany in the winter of 2024/2025 were considered:

1. The first scenario uses the temperatures of the EU weather year 2016 to consider normal temperatures.
2. Another scenario assumes “warm temperatures” like in the European winter of 2020.
3. A third scenario examines the gas supply for “cold temperatures” corresponding to the European winter of 2010.

The INES scenarios for gas supply in the winter of 2024/2025 were first presented with the July update. The current November update updates this scenario outlook again.

INES publishes updates on the INES gas scenarios every two months. The next update is scheduled for January 15, 2025.

A detailed description of the scenarios and results is available in a comprehensive documentation. An additional slide set presents the key contents of the documentation clearly. Since the update in February 2024, no more press conferences have been held to explain the gas scenarios in detail. Previous press conferences on the gas scenarios were recorded and can be viewed on the [INES YouTube channel](#). The publication of the updates remains unaffected. The updates have been published every two months since the November 2024 update, even in winter.

Current information on gas storage levels in Germany and in the individual federal states can be accessed at any time via the [INES storage map](#). In addition, storage data can be filtered not only by different storage types (cavern and pore storage) but also by gas qualities (L-/H-gas and hydrogen).

#### **ABOUT US:**

The Initiative Energien Speichern e.V. (INES) is an association of operators of German gas and hydrogen storage facilities based in Berlin. With currently 17 members, INES represents over 90 percent of German gas storage capacities and about 25 percent of all gas storage capacities in the EU. INES members are also driving the development of underground hydrogen storage in numerous projects and are among the pioneers of this important energy transition technology.

The members of the initiative are bayernugs GmbH, Enovos Storage GmbH, Erdgasspeicher Peissen GmbH, Etzel-Kavernenbetriebsgesellschaft mbH & Co. KG, EWE Gasspeicher GmbH, Gasunie Energy Solutions I GmbH, HanseWerk AG, OMV Gas Storage Germany GmbH, NAFTA Speicher GmbH & Co. KG, RWE Gas Storage West GmbH, SEFE Storage GmbH, STORAG ETZEL GmbH, Storengy Deutschland GmbH, Trianel Gasspeicher Epe GmbH & Co. KG, USG Blexen GmbH, Uniper Energy Storage GmbH, and VNG Gasspeicher GmbH.

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