PRESS STATEMENT

INITIATIVE ENERGIEN SPEICHERN

INES

Berlin, September 16, 2025

INES Gas Scenarios: Positive Storage Filling Level Development Since July, but Risks Remain

With the current September update, the Initiative Energien Speichern (INES) analyses the gas supply situation in Germany for the coming winter. The scenarios show that the gas storage capacities booked so far by market participants can be fully filled by November 1, 2025, reaching a storage level of 81 percent. This level ensures a secure gas supply under normal to warm temperature conditions.

Germany began the new storage year on April 1, 2025, with a comparatively low storage level of 29 percent. Since then, the filling process has increased significantly, and the current level stands at 75 percent.

Compared to the July update, which considered a maximum storage level of 70 percent, bookings for gas storage capacities have now increased to 81 percent. Market players are thus able to fully fill the booked capacities.

Despite this positive development, the latest scenarios still show significant risks during extremely cold temperatures. The main reasons are, firstly, a structurally higher gas consumption observed over the past two months and, secondly, slower storage filling in other European countries, which offsets the positive effect of higher German storage filling levels.

Scenarios for Winter 2025/26

Based on a maximum storage level of 81 percent, the following scenarios result:

- **Warm to moderate temperatures:**
  Gas storage facilities will be moderately to considerably emptied by the end of March 2026. The legal storage level requirement of 30 percent by February 1, 2026, can be met in both cases.
- **Extremely cold temperatures:**
  Gas storage facilities will be completely emptied by the end of January 2026. Under current consumption patterns, demand could no longer be fully met in such a scenario.

Sebastian Heinermann, Managing Director of INES, comments on the current results as follows: *"The September update of the INES gas scenarios shows that the current storage level development can ensure a secure gas supply under normal temperatures. However, the major challenges that have accompanied the filling process this year make it clear that suitable instruments for safeguarding the filling of gas storage facilities next year should now be discussed swiftly. With the coalition agreement, the federal government had already announced plans to introduce measures to ensure a secure and more cost-efficient filling of gas storage facilities."*

Background on the INES Gas Scenarios:
INES continuously models the European gas markets to assess the security of gas supply. Based on this modeling and taking into account the storage levels as of September 1, 2025, three scenarios for gas supply in Germany for summer 2025 and winter 2025/26 were considered:

- The first scenario uses country-specific temperatures from the EU weather year 2016 to reflect normal weather conditions.
- Another scenario assumes "warm temperatures" similar to those of the European winter in 2020.
- A third scenario examines the gas supply under "cold temperatures" comparable to the European winter of 2010.

INES publishes updates on the INES gas scenarios every two months. **The next update is scheduled for November 18, 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.

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 16 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, 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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