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INES-Gas-Scenarios: Winter Outlook Reveals Risks – Gas Storage Levels Before Winter at a Low Level

Germany is entering the heating season with an unexpectedly low storage level of only 75 percent. The November update of the INES Gas Scenarios shows that, under extremely cold temperatures, supply shortages may emerge as early as mid-January. INES calls on the Federal Government to fulfil its coalition promise by introducing effective instruments to ensure adequate gas storage levels in the future.

Berlin, November 18, 2025 - Germany began the storage year on April 1, 2025 with a filling level of 29 percent. Although storage injections progressed continuously over the summer, they lagged significantly behind both the European average and last year's development.

By early November, storage facilities had been filled to only 75 percent. This starting level is:

- noticeably below the usual filling levels of recent years,
- below the value anticipated in the September update, and
- below the technically feasible level achievable solely through booked capacities.

Under the Gas Storage Act, the Federal Government had the ability at any time to deploy state instruments to ensure higher filling levels.

WINTER 2025/26: SCENARIOS INDICATE A CLEAR RISK PROFILE

Based on the actual starting level of 75 percent, three scenarios were modelled:

- **Warm to moderate temperatures (weather years 2020 and 2016)**
- 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 (weather year 2010)**

Gas Storage facilities would be completely emptied by mid-January. Consumption corresponding to current savings levels could then no longer be fully covered. The resulting shortfalls are larger compared to the September update.

The intensification of risks is primarily attributable to:

- a lower starting level than expected,
- higher gas consumption during the past four months,
- weaker storage injections in the EU internal market.

FEDERAL GOVERNMENT MUST DELIVER ON ITS COALITION COMMITMENT TO GAS STORAGE LEVELS

Sebastian Heinermann, Managing Director of INES, comments:

“The November update clearly shows that storage levels for the winter of 2025/26 are insufficient in the event of an extremely cold winter, despite newly available LNG import capacities. The existing political framework was not utilised to ensure higher storage levels. Looking ahead, it is essential that the Federal Government – as announced in the coalition agreement – introduces instruments that ensure secure and cost-efficient filling of gas storage. A comparison with storage levels in other EU member states demonstrates clearly that winter preparedness can be significantly improved through political measures.”

This commitment appears verbatim in the coalition agreement, where the Federal Government states it will *“introduce instruments to ensure secure and cost-efficient filling of gas storage facilities”* (Coalition Agreement, p. 30).

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 January 20, 2026.**

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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