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INES Gas Scenarios: Historically Low Storage Levels – Window for Sufficient Refill Is Closing

At the beginning of September, German gas storage facilities are only around 53% full – the lowest level recorded at this time of year since records began 15 years ago. The latest September update of the INES Gas Scenarios shows that, from a technical perspective, a storage level of around 77% can still be reached by 1 November. The key question now, however, is whether storage customers will actually fill the capacities they have booked – and whether they will do so quickly enough. In its previously published action plan, the Initiative Energien Speichern e.V. (INES) has proposed concrete measures to strengthen storage injections in the short term.

German gas storage facilities are entering the final two months of the injection season at a historically low level. At the beginning of September, they were around 53% full. Last year, this level had already been reached by the end of June. At the beginning of September 2025, storage facilities were around 71% full – approximately 20 percentage points higher than today.

Since INES began keeping records 15 years ago, no comparably low storage level has been recorded at this time of year. Refilling has therefore fallen significantly short of the required pace so far this year.

77% Is Still Technically Achievable – Booked Capacities Must Now Be Filled

The latest INES modelling shows that a storage level of around 77% can still technically be achieved by 1 November 2026. This would bring storage levels close to the current level of booked capacity, which stands at around 83%.

Technical feasibility alone, however, does not guarantee that this level will actually be reached. The decisive factor is whether storage customers make use of their booked capacities and inject sufficient volumes of gas over the coming weeks.

To achieve this, the pace of injections would have to increase significantly: over the remaining two months until 1 November, more gas would need to be injected in total than during the previous three months combined. If injections remain at their current low level, the technically achievable storage level will also decline as time progresses.

Sebastian Heinermann, Managing Director of the Initiative Energien Speichern e.V. (INES), comments: *“German gas storage facilities are at historically low levels for this time of year. While it is still technically possible to reach a storage level of around 77%, simply having storage capacities booked is not enough. Filling storage facilities must be economically viable if market participants are to actually carry it out.”*

77% Is Not Sufficient in an Extremely Cold Winter

The sensitivity analysis of the INES Gas Scenarios illustrates the importance of filling storage facilities as much as possible ahead of winter. Under normal winter temperatures, the modelling indicates that a storage level of around 77% on 1 November would be sufficient to fully ensure gas supply throughout the winter of 2026/27. In this scenario, storage levels would fall to around 38% by 1 April 2027.

Under extremely cold temperatures, however, a storage level of around 77% would not be sufficient. On individual days in January, supply shortfalls could exceed 25%. To fully ensure gas supply even under extremely cold conditions, a higher level of booked capacity and the actual filling of those booked capacities are therefore required.

INES Action Plan Sets Out Measures to Strengthen Storage Refilling

Whether booked capacities are actually filled depends to a large extent on the economic framework conditions. Current market conditions do not provide sufficient incentives for increased storage injections. In particular, higher gas prices resulting from the closure of the Strait of Hormuz and a summer-winter spread that is at times even negative are making storage refilling more difficult.

INES has therefore presented an action plan containing concrete measures that could strengthen storage refilling in the short term. These include a full discount on network tariffs at storage connection points and the abolition of the conversion levy for storage use. INES also proposes government-supported, preferential financing options – for example through KfW – to reduce the financing costs associated with gas injected into storage.

Additional tenders for Long-Term Options (LTOs) could also provide further incentives for injections. In INES's assessment, however, they can make only a limited contribution and should therefore be used as part of a broader package of measures.

Storage Facilities Also Need a Reliable Long-Term Framework

Beyond the measures required in the short term, INES advocates a reliable framework that permanently ensures sufficient storage levels and preserves the storage capacities required for security of supply. Economic incentive models, effectively designed obligations, or a combination of both approaches should be considered for this purpose.

The objective should be a model that safeguards security of supply while at the same time preserving as much scope as possible for market-based storage operations.

BACKGROUND ON THE INES GAS SCENARIOS:

INES continuously models the European gas markets to assess gas supply security. For the September update, the scenarios were calculated based on actual storage levels as of 1 September 2026, as well as updated temperature and consumption data.

A detailed description of the assumptions and results is provided in the documentation accompanying the September update. An accompanying slide deck provides a clear overview of the key findings.

INES publishes updates on the INES gas scenarios every two months. **The next update is scheduled for November 10th 2026.**

Up-to-date information on gas storage levels in Germany and in the individual federal states is available at any time via the [INES Storage Map](#). The map also allows storage data to be filtered by storage type (cavern and porous rock storage facilities) as well as by gas quality (L-gas/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, 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, RAG Energy Storage, 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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