

Gas Winter Outlook 2017/18



BIEE 19th October 2017

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A new era?

- Rough
- LNG
- BBL



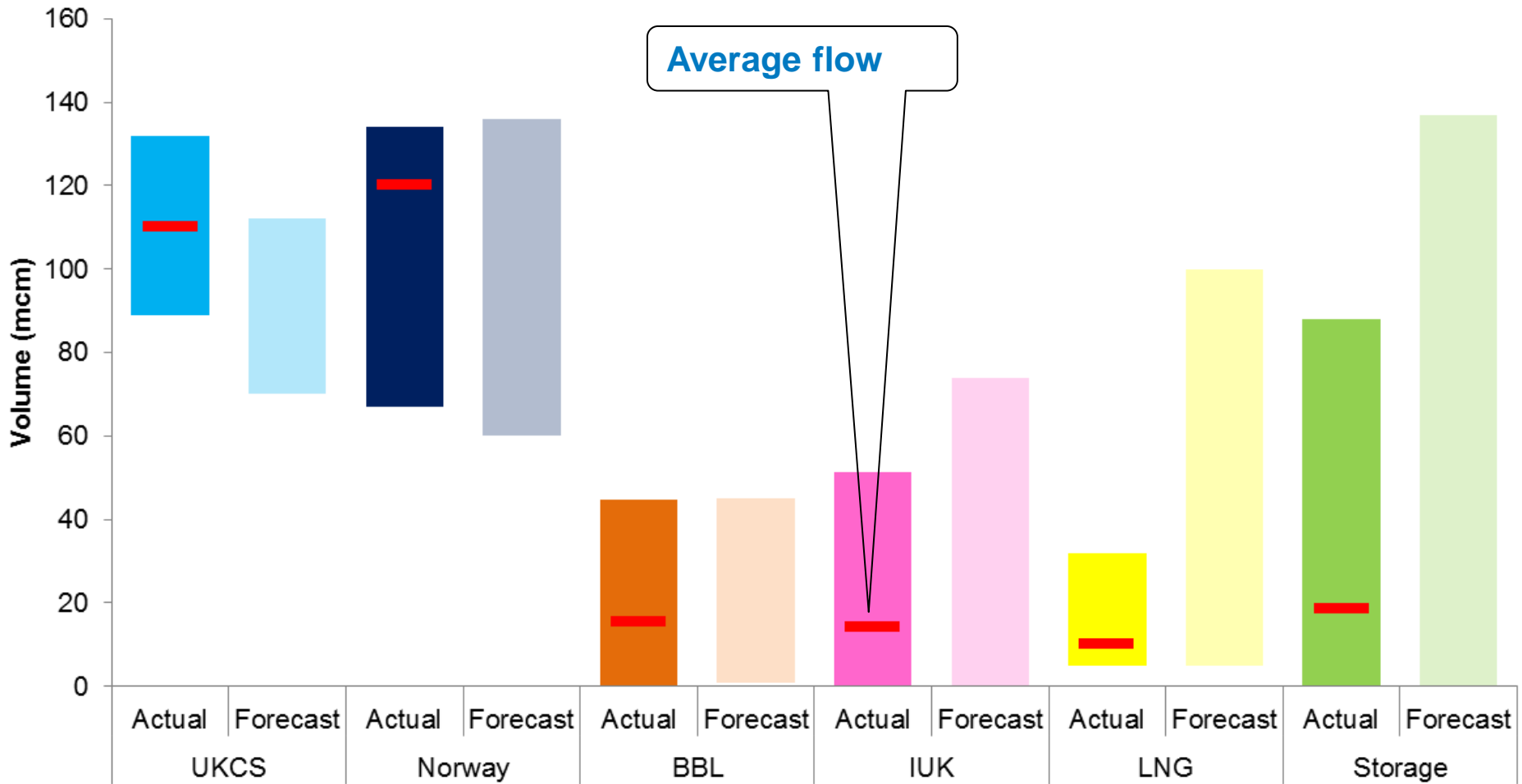
Why do we prepare a winter outlook?

As the GB System Operator, part of our role is to provide credible analysis of how the energy sector might look based on the latest information available to us. This report draws together **analysis and feedback from across the industry** to present robust data and help optimise availability for the coming winter by **ensuring the market is fully informed**

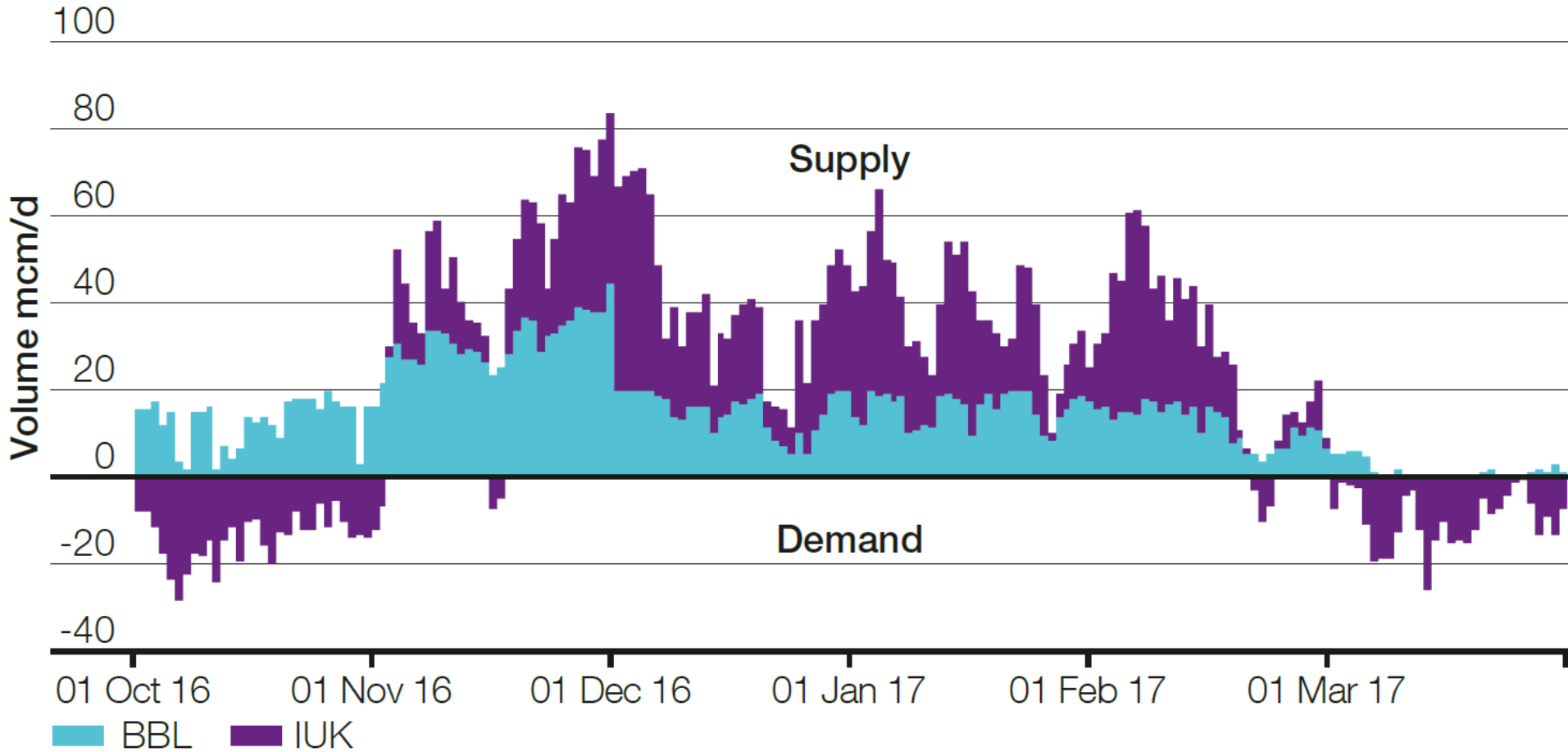
Winter Review - Demand

October to March Winter	Our forecast bcm	Actual bcm	Weather corrected bcm
NDM	29.5	29.3	29.7
DM + Industrial	5.0	5.0	5.0
Ireland	1.4	1.6	1.6
Total Power	11.1	13.8	13.8
Total demand	47.7	49.9	50.3

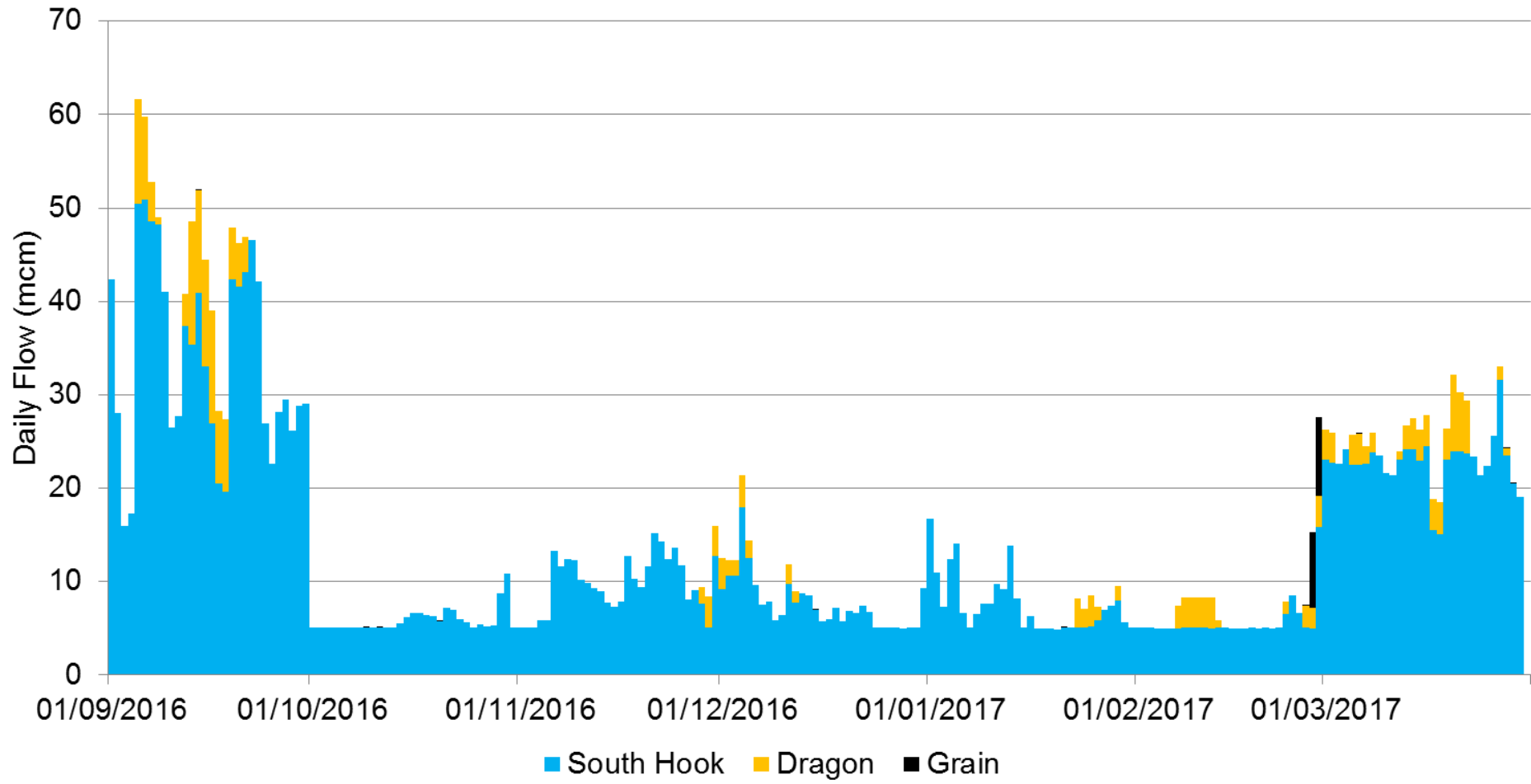
Actual and forecast supplies by source



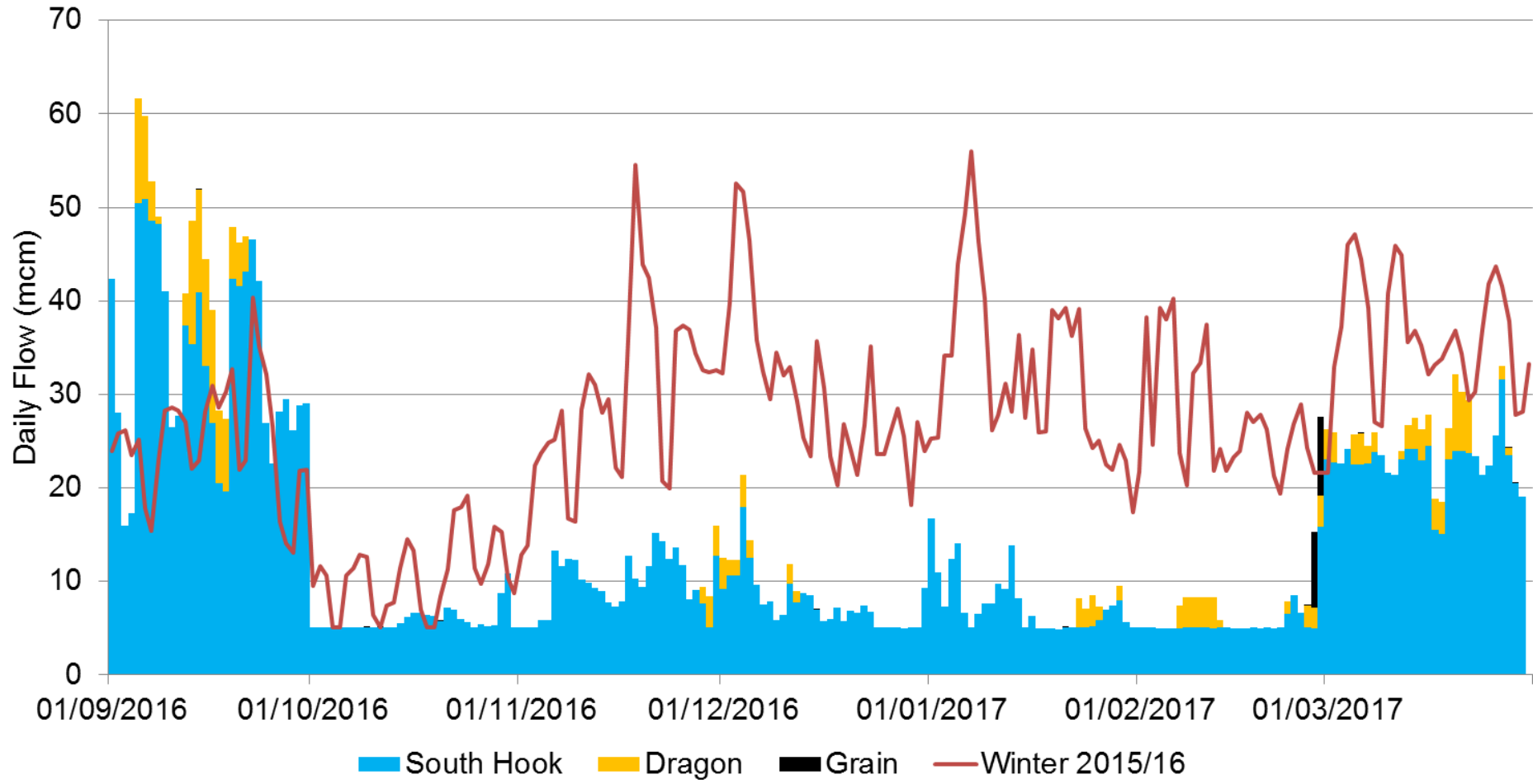
Interconnector flows



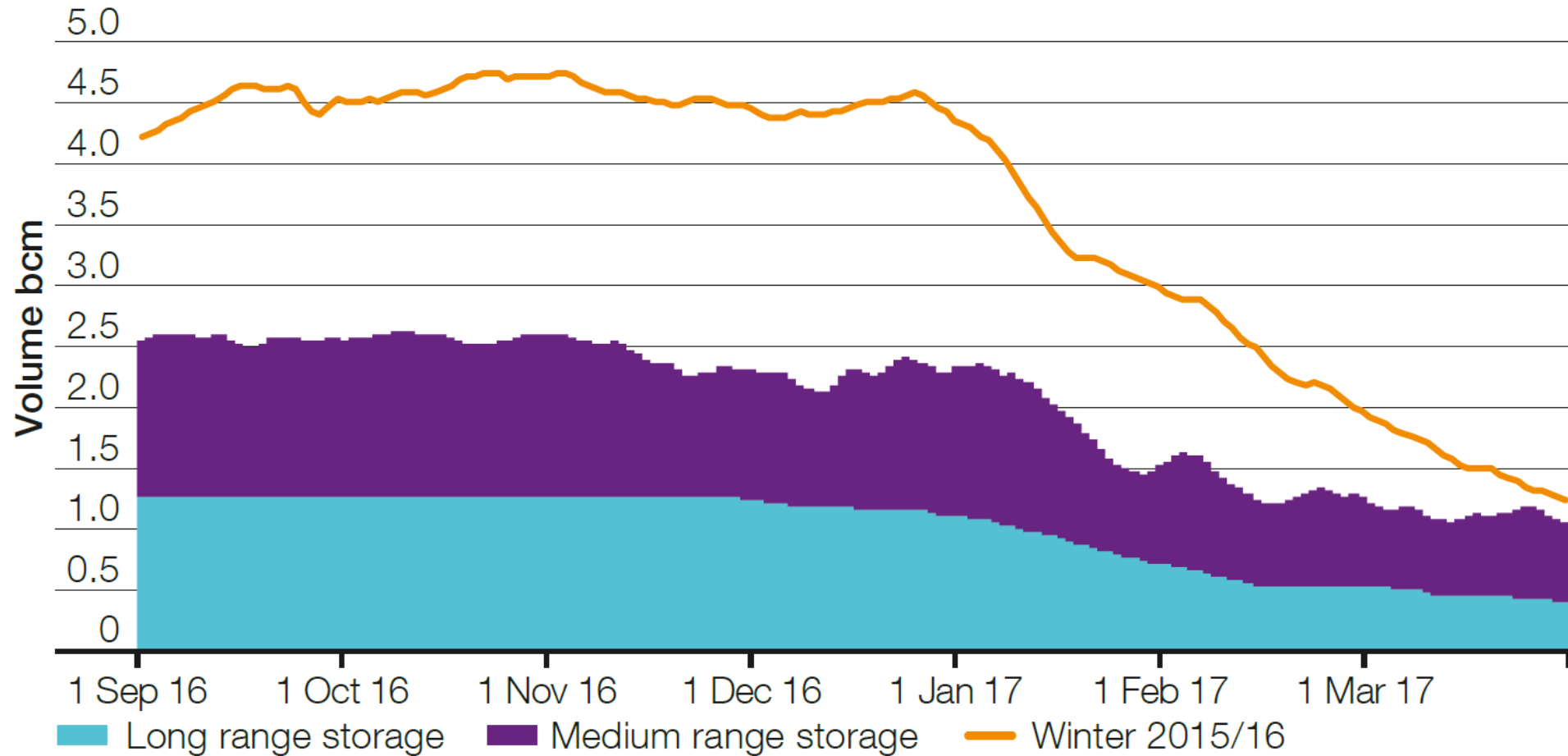
LNG flows



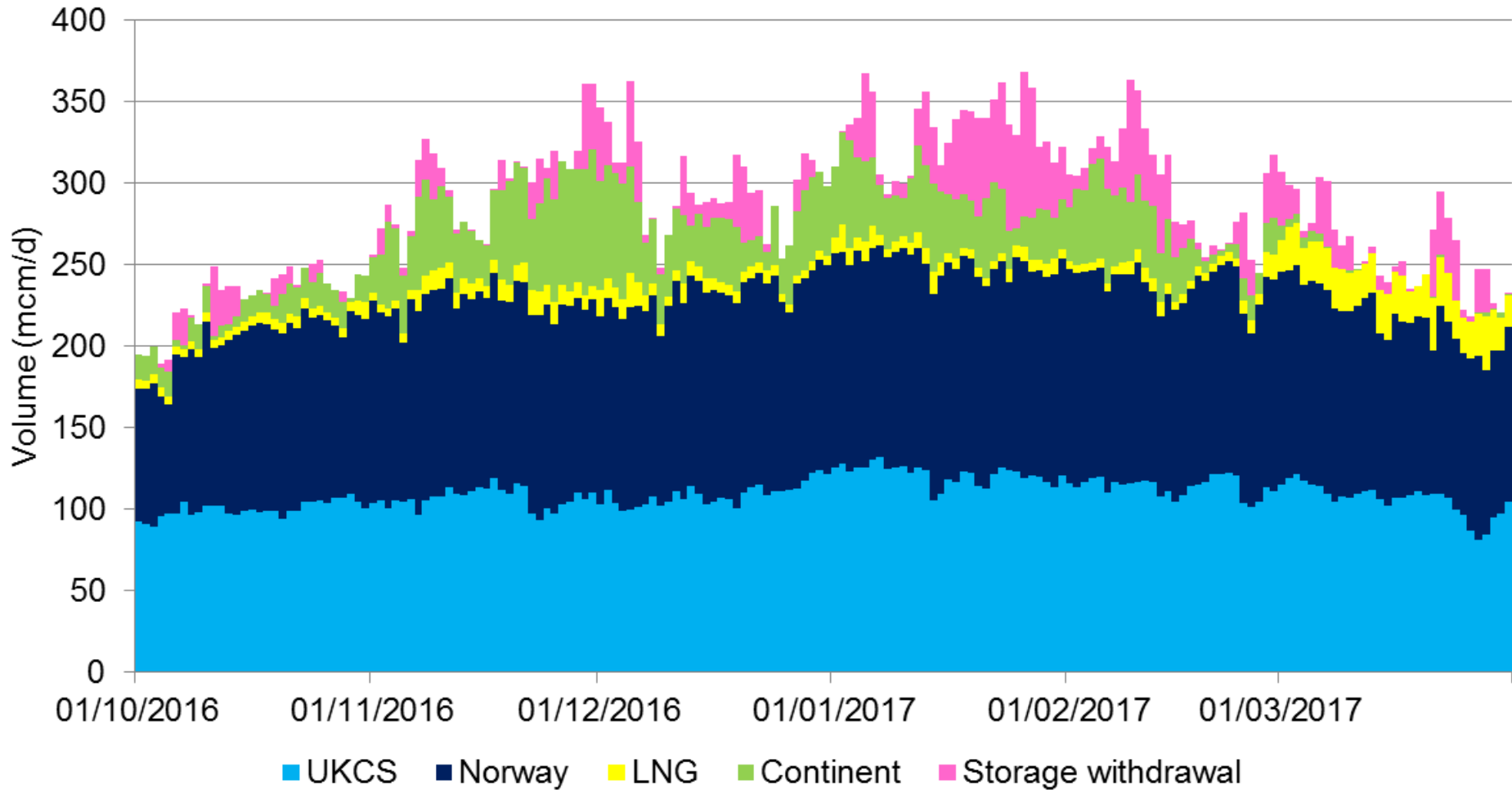
LNG flows



Stock levels in storage



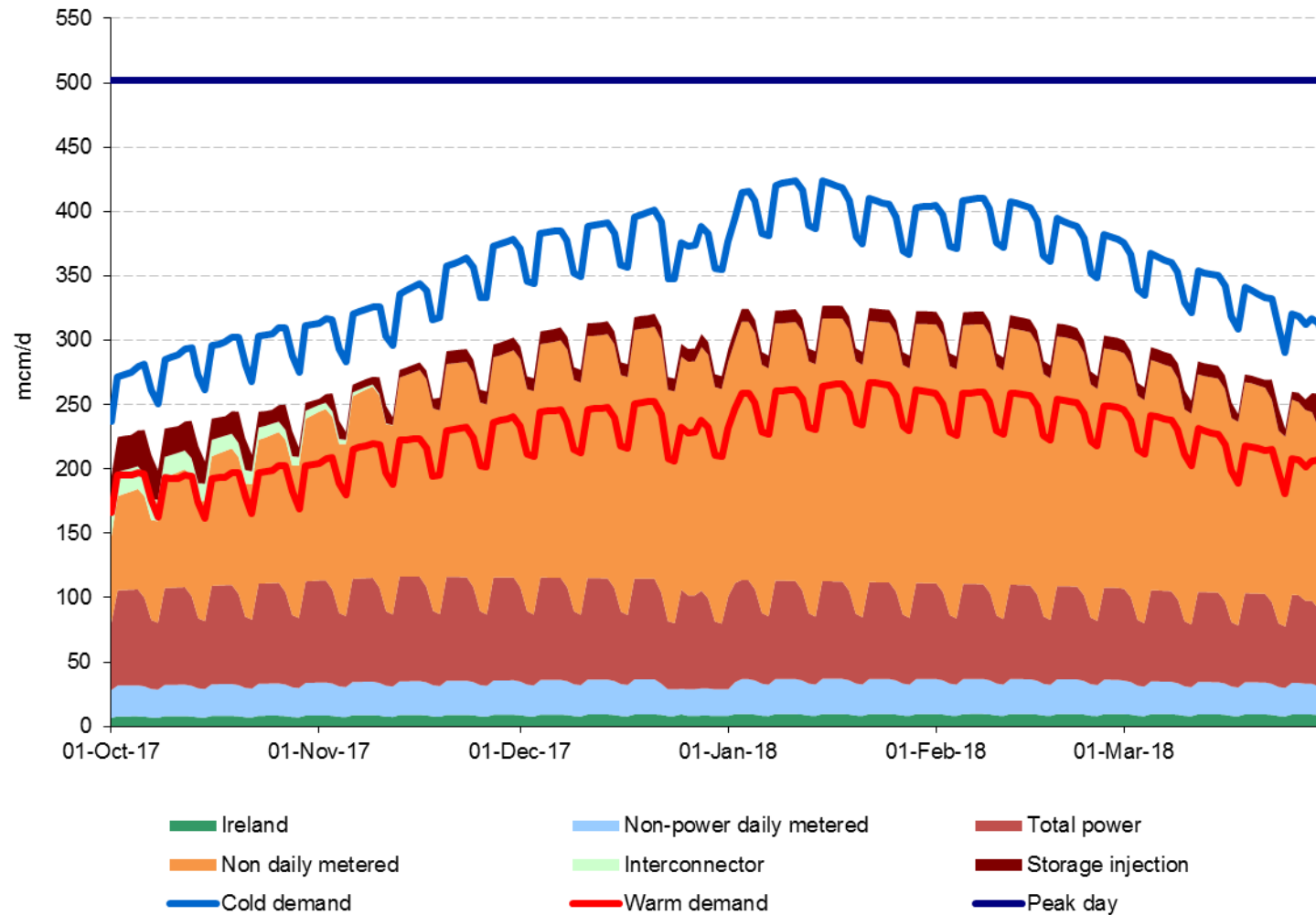
Daily supplies



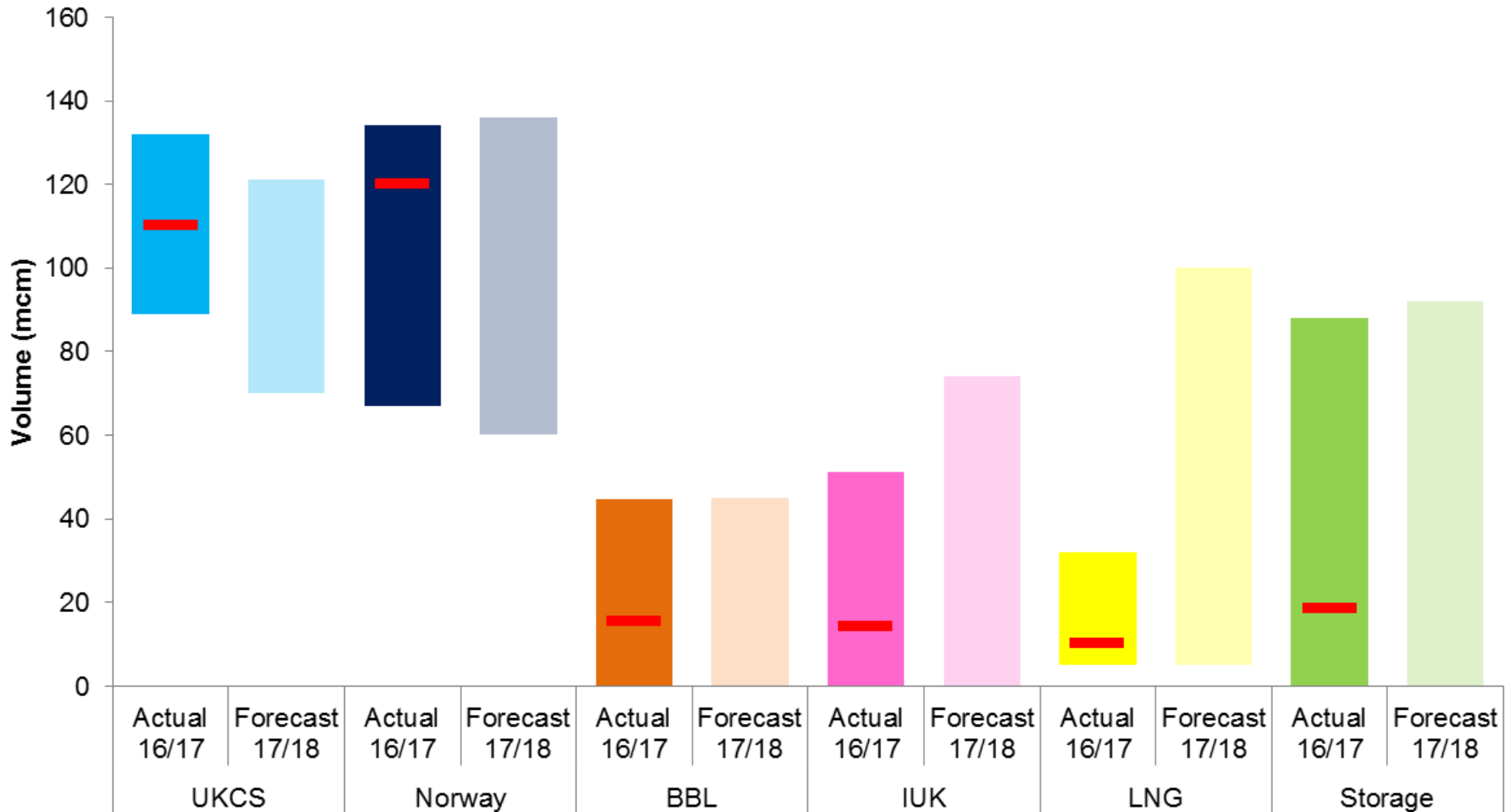
Gas outlook



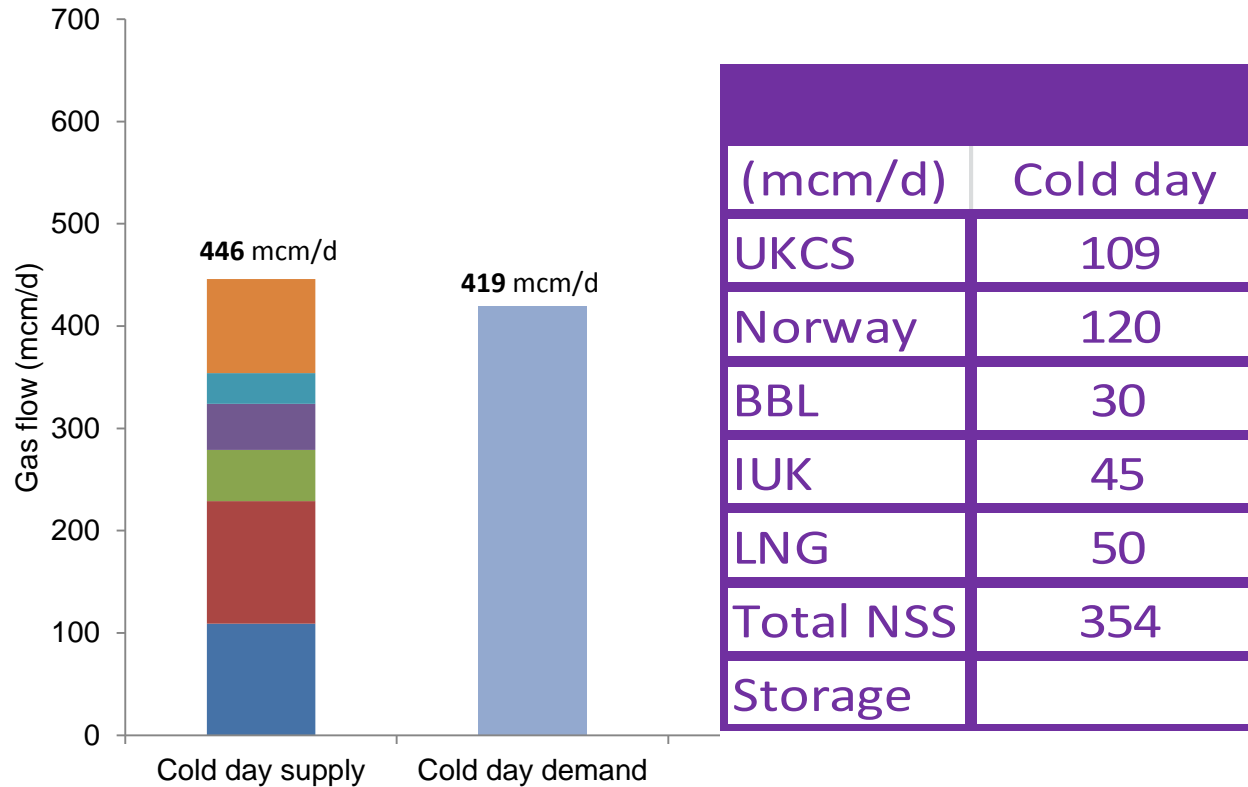
Gas demand is expected to be lower than last year



Forecast supply ranges

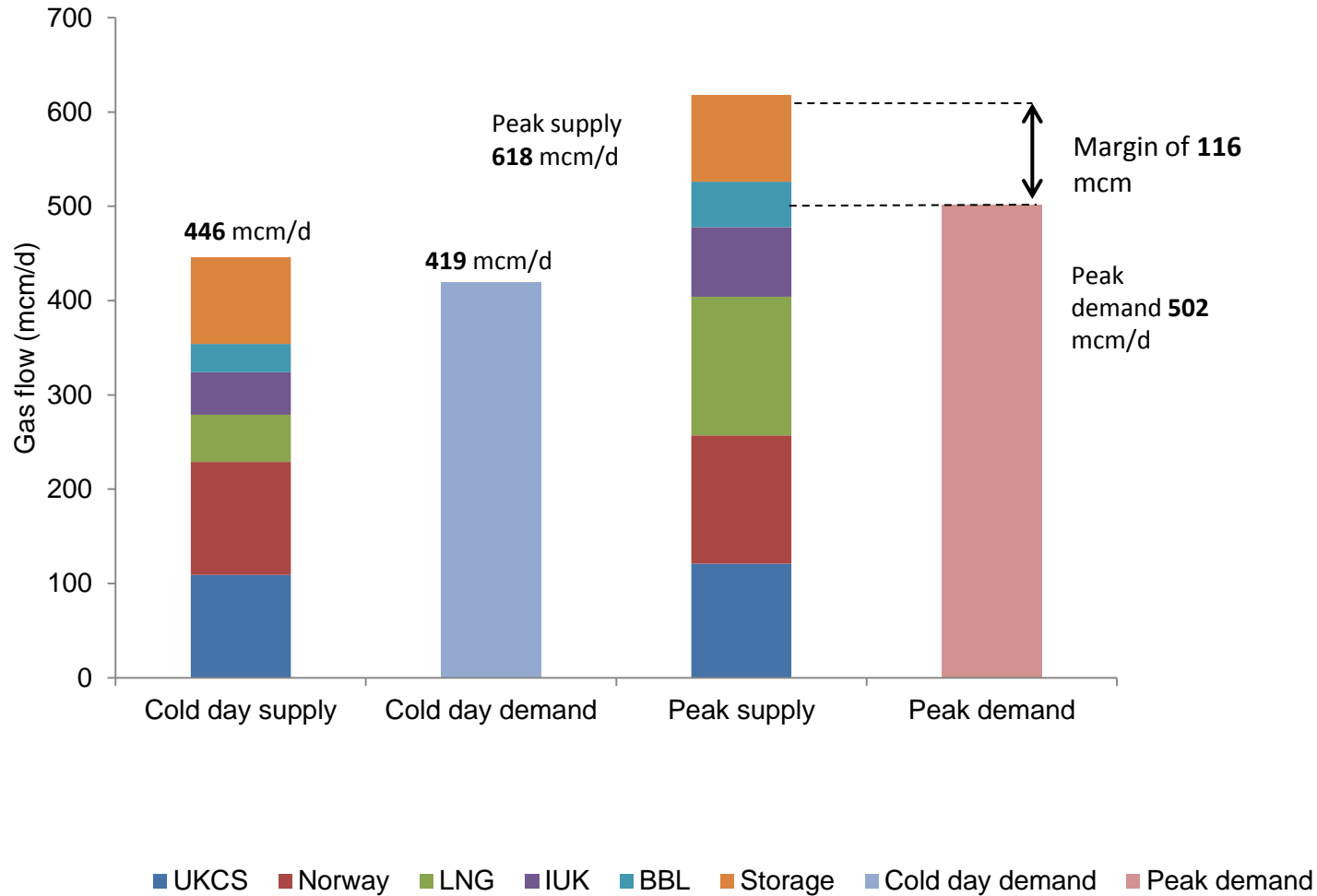


Sufficient gas supply is available to meet demand



■ UKCS ■ Norway ■ LNG ■ IUK ■ BBL ■ Storage ■ Cold day demand

Sufficient gas supply is available to meet demand



On the Watch List

- LNG
- Groningen and BBL
- IUK
- Storage use
- ~~■ Gas/Coal Switching~~
- ~~■ Ukraine~~
- ~~■ El Niño~~

Questions?
