PRESS RELEASE
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2024 in review – gas markets and the energy transition

French infrastructure proves key in transporting gas within Europe

- **Gas prices in Europe have plummeted since 2021, in a climate that remains strained.**
- **The decline in French consumption (5.5%) is largely due to a decrease in electricity production by gas-fired power plants and an increase in energy efficiency measures. Consumption among industrial customers experienced a slight upturn.**
- **As a key gateway for LNG into Europe, France ramped up its transit capacities and accounted for 24% of European LNG imports.**
- **Gas stocks and entry capacities are sufficient for energy suppliers to guarantee meeting French demand this winter.**
- **Renewable gas production amounted to 11.6 TWh in 2024 (9.2 TWh in 2023), equivalent to two nuclear reactors.**
- **NaTran is moving forward with its hydrogen and CO2 transport projects in an evolving market; three H2 and two CO2 projects received European grants (€35m), and the Open Season launched for H2med identified the needs of stakeholders for the green corridor planned for 2030.**

Sandrine Meunier, NaTran's CEO, said: "*European gas markets experienced a lull in 2024, while France confirmed the key role it has as a transit country, exporting 123 TWh to its neighbours (up 10% on 2023). Domestic gas consumption fell by 5.5%, primarily due to less demand on gas-fired power plants to balance the electricity grid. At the same time, the share of renewable gas produced across French regions continues to rise.*"

Electricity production by gas-fired power plants fell sharply in 2024

The downward trend observed since 2022 continued into 2024. Gas consumption in France decreased by 5.5% in 2024 compared to 2023, amounting to 361 TWh, primarily due to lower demand on gas-fired power plants to balance the electricity grid. In 2024, the sharp drop in demand from gas-fired power plants (16 TWh consumed in 2024, a 56% decrease on 2023) can be attributed to the recovery of nuclear production (up 13% on 2023) and the growth of renewable energies (up 12% on 2023).

French domestic consumption through gas distribution networks (households, tertiary sector and small industry) fell by 1.4%, in climate-adjusted data. Consumption continued its gradual downward trend due to increased energy efficiency measures and sustained sobriety efforts (consumption fell by over 20% between 2021 and 2024).

Consumption among industrial customers connected to the transport network experienced a slight upturn (0.8%), largely driven by the chemical, petrochemical, agrifood and metallurgical sectors.

A sustained secure supply in France and Europe

Gas prices in Europe and their volatility have fallen drastically since 2021, in a market that remains strained, while LNG production is currently operating at full capacity. Gas demand in Europe is stable compared to 2023, at 3,500 TWh compared to 4,400 TWh in 2021, a drop of 19%.
The decrease in imports is offset by significant withdrawals from gas stocks, amounting to 146 TWh.

French gas supplies come 57% from LNG (down 14% in volume) and 43% from pipeline imports (down 4% in volume). The decrease in gas inflows comes following the economic decision to prioritise withdrawals from stocks. France ramped up its transit capacities in Europe, exporting 123 TWh to its neighbours (up 10% on 2023), primarily to Switzerland, Italy and Belgium. France remains a key gateway for LNG into Europe, accounting for 24% of European imports.

French storage facilities are at 22% capacity (at the lower end of historic storage levels in France).

However, gas stocks and entry capacities are sufficient for suppliers to guarantee meeting French demand this winter.

Renewed momentum for renewable gases

In 2024, 11.6 TWh of biomethane was injected into gas networks (9.2 TWh in 2023) via 731 methanisation facilities all networks combined (up 79 sites), equivalent to the production of two nuclear reactors or the gas consumption of a large French region such as Occitanie or Bourgogne-Franche-Comté. Additionally in 2024, 36% more new projects entered the gas capacity register compared to 2023, due to the combined effects of the implementation of biomethane production certificates by public authorities and the confirmation of interest from industry and transport sectors for biomethane as energy.

Following accelerated efforts to adapt the network to optimise the production of renewable gases, 28 reverse flow stations are now in operation (an increase of 8) to transport locally produced biomethane from the distribution network to the transport network. New technological innovations for producing renewable gas (pyrogasification and hydrothermal gasification) are ready to be ramped up to industrial scale, as demonstrated by the results of the hydrothermal gasification call for expressions of interest that identified 24 promising projects in France.

Hydrogen and CO2: infrastructure projects advance in an evolving market

Five hydrogen and CO2 infrastructure projects (Barmar, HY-Fen, Rhyn, DKHARBO and GO CO2), led by NaTran and its partners, secured €35m of EU funding as part of efforts to shape Europe's future energy market.
In the area of hydrogen transportation, several regional and cross-border projects made significant progress in 2024: MosaHYc entered the investment phase, while HynFramed and DHUNE both stepped into the basic engineering phase.
The BarMar-H2med and HY-FEN pipeline projects set up to build a national and European hydrogen corridor linking the Iberian Peninsula with Germany while supplying hydrogen to French industrial users along its path also received grants. The call for expressions of interest launched in late 2024 was a resounding success, with 500 projects identified and 168 companies declaring an interest. In France, 54 companies responded, representing 81 projects around France.
As for CO2 transportation, the DKHARBO project partnered up with Equinor and entered a preliminary research phase. The GO CO2 project also signed a cooperation agreement with partners Elengy, Heidelberg Materials, Lafarge, Lhoist and NaTran.

About NaTran

NaTran is the new name of GRTgaz. The year 2025 marks the 20th anniversary of the company, which is opening a new page in its history by changing its name and adapting a NaTran2030 corporate project focused on the energy transition and carbon neutrality. To achieve this, the company is adapting its network and practices to the ecological, economic and digital challenges. It offers infrastructure and logistics adapted to gases that are part of the energy transition (biomethane, H2 and CO2). NaTran is the 2nd largest gas transmission operator in Europe. The Group has two subsidiaries: Elengy (Europe's leading LNG terminal operator) and NaTran Deutschland (operator of the MEGAL network). NaTran carries out public service missions aimed at guaranteeing safe gas transport for its customers. Its NaTran R&I research centre (formerly RICE) is an international benchmark in research and innovation applied to the energy transition. NaTran Group key figures: 33,800 km of pipelines, 680 TWh of gas transported, nearly 3,800 employees, €2.6 billion in 2023. To find out more about NaTran and its initiatives, visit NaTrangroupe.com, X, LinkedIn, Instagram.

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