

GASGRID 



Gas Market Forum 25.5.2026  
Gasgrid Gas Business

# Agenda

- Opening of the Forum
- Development of the Methane infrastructure / SVP Gas Business Janne Grönlund
- Gas Market update / Senior Gas Market Specialist Aaro Piirainen
- Inkoo Terminal Updates / Commercial Manager Rasmus Hellman
- Renewable Gases and GO's / Service Manager Heli Haapea
- Closing of the Forum

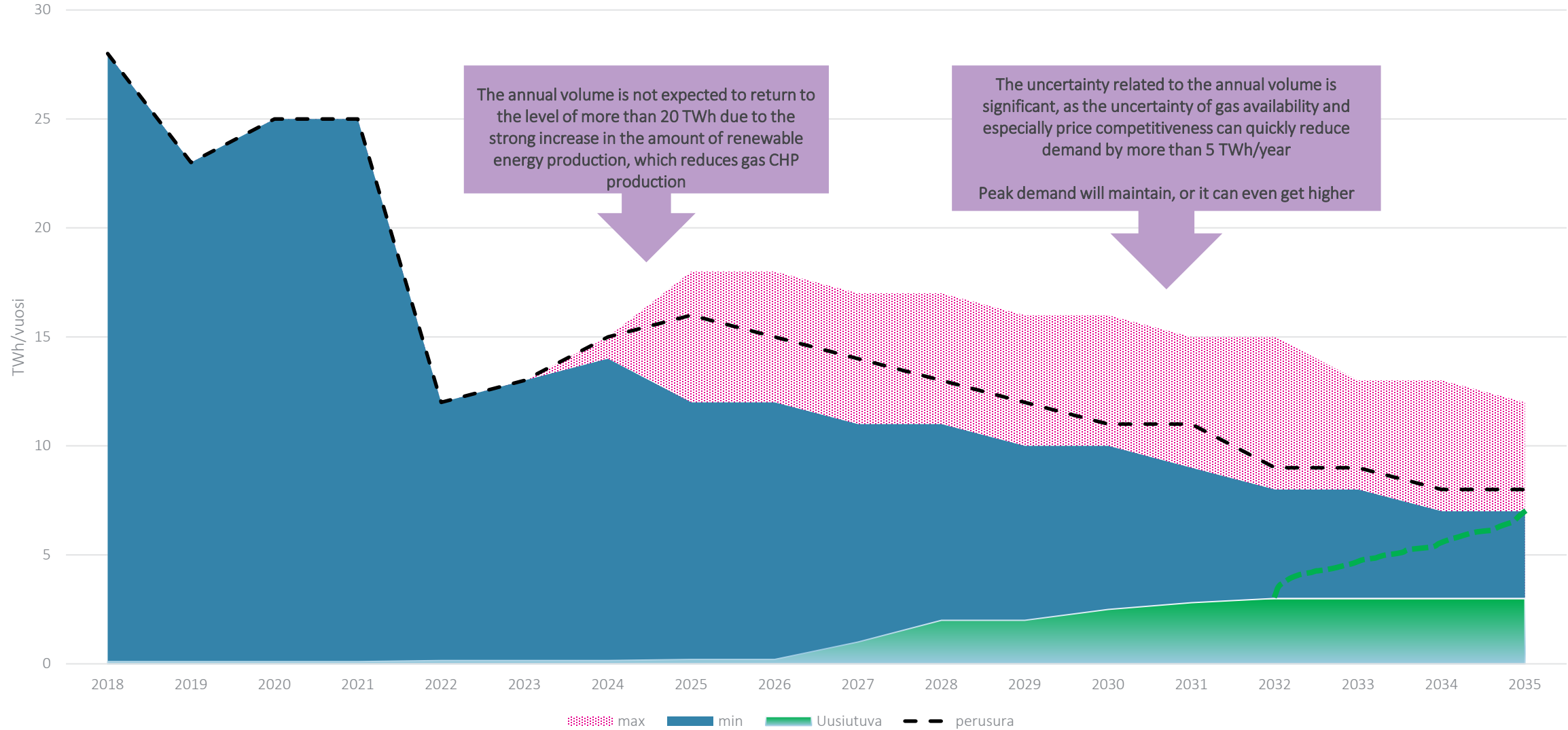
A photograph of two young children walking away from the camera on a dirt path in a park. The child in the foreground is wearing a green and white striped shirt, blue shorts, and green rubber boots, holding a yellow shovel. The child in the background is wearing a blue and white striped shirt and blue pants. The scene is set during sunset, with warm light filtering through the trees.

# GAS MARKET OUTLOOK AND PROSPECTS

25.5.2026

Janne Grönlund, SVP, Gas Business Unit, Gasgrid Finland

## Gas demand forecast [TWh/year] and renewable gas availability outlook [TWh/year]



# Flexible multi-gas platform

## Energy storages

Gasgrid pipeline 60 GWh  
Hamina LNG terminal 200 GWh  
Inkoo LNG terminal > 1000 GWh  
Latvia UGS 25 000 GWh



## Flexible multi-player market

~ 20 market participants  
24/7 gas marketplace (OTC + exchange)  
Balance period 1 day

## Renewable domestic methane gases

2023 : 140 GWh/year  
~ 2030 : 2000 – 3000 GWh/year

## Sector integration in electricity

> 1000 MWe electricity production capacity  
Geographically distributed production  
Weather independence  
Fast and extensive adjustability

## Efficient logistics

Pictured: 10,000 MW transmission capacity



## Transmission capacity

To the Finnish gas market 140 GWh/day  
To Estonia 80 GWh/day

The existing infrastructure allows for additional capacity to be connected to the system

## Global LNG procurement



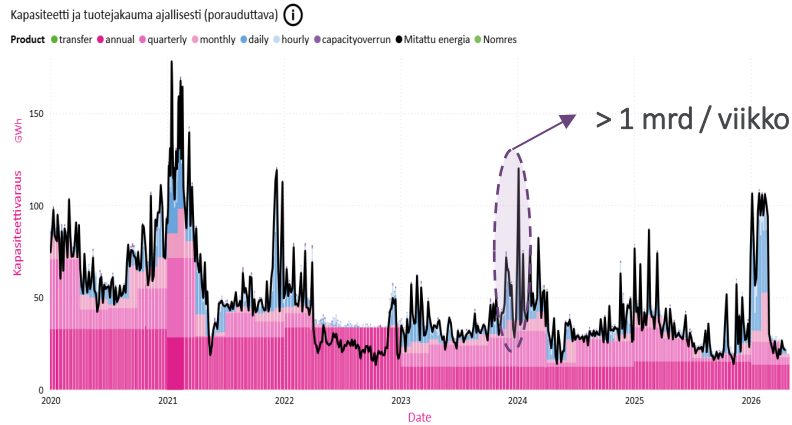
Kuva: \*

## Connections to LNG terminals

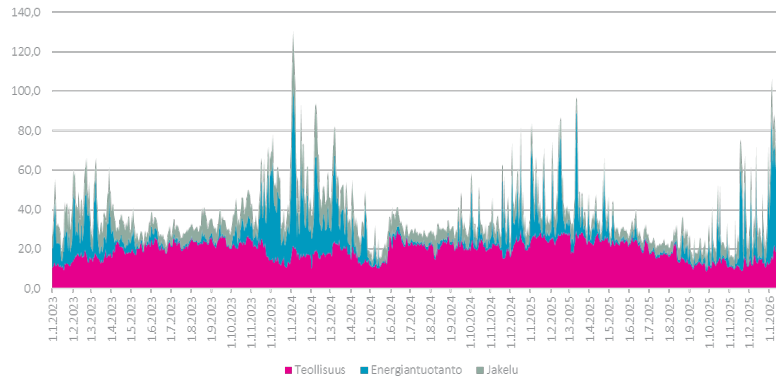
Possibility to supply LNG and bio-LNG to maritime traffic

# Change in the gas utilization pattern has been significant

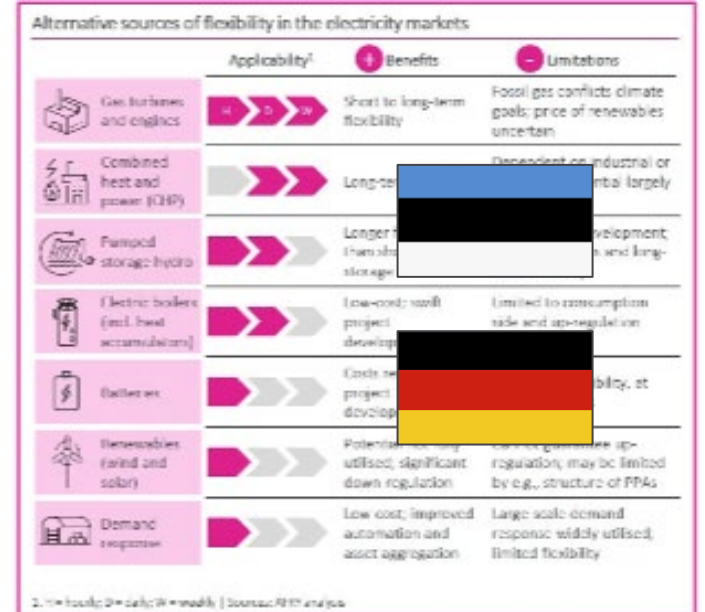
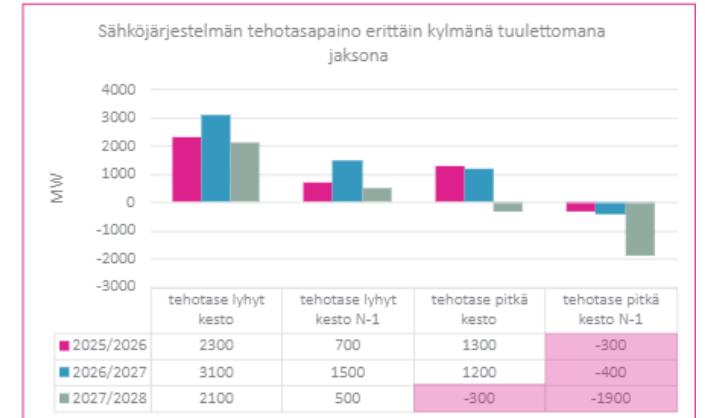
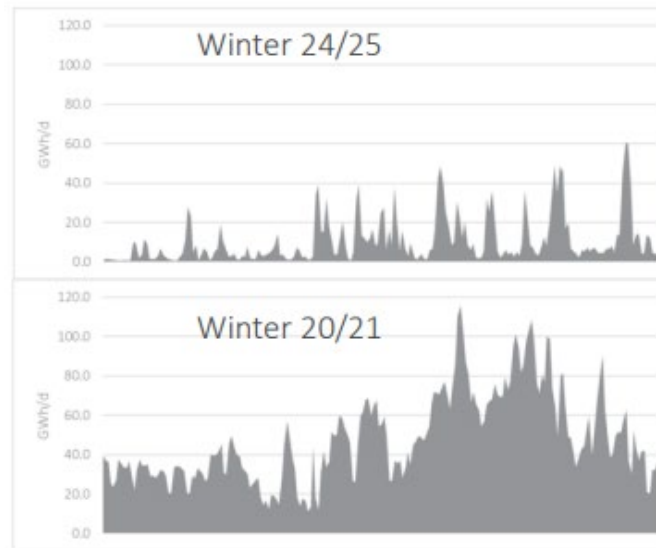
## Kaasun käyttöprofiili päivätasolla



Käyttö sektoreittain

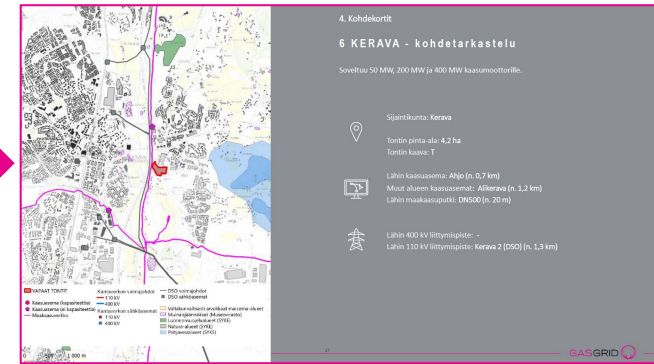
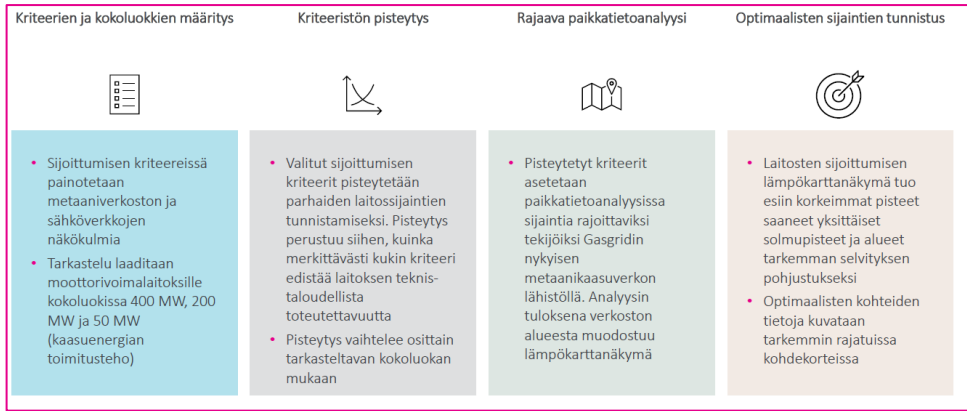


Energy segment utilization has changed significantly

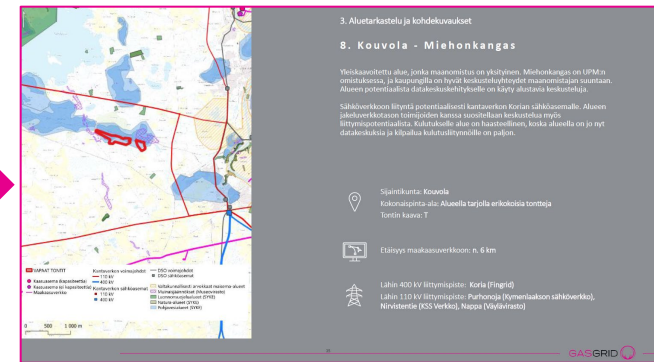
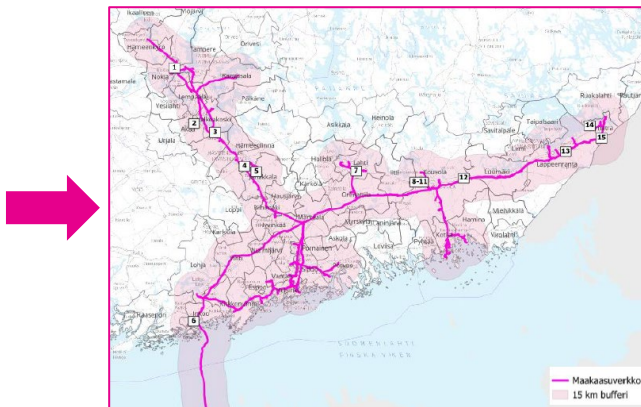
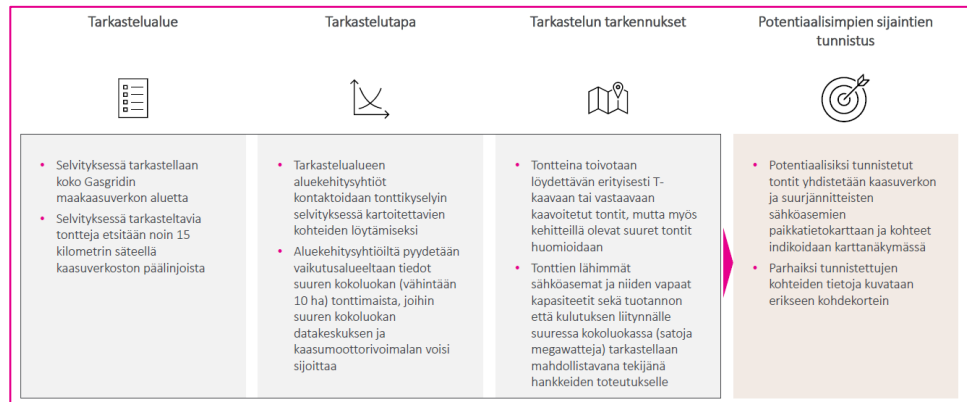


# Gasgrid conducted a study to identify optimal places for new consumption such as gas engines

1.

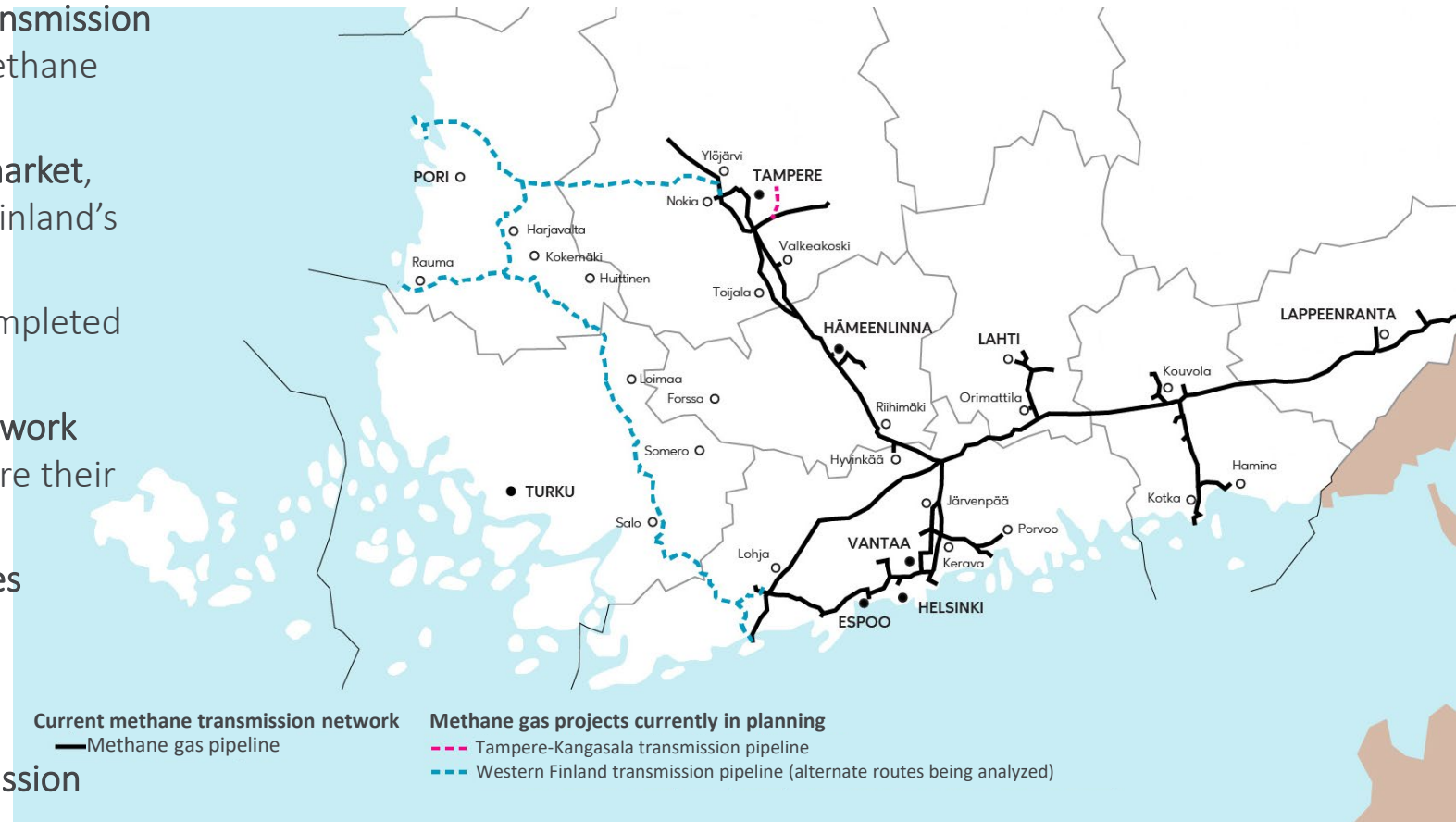


2.



# Possible extension of the current methane infrastructure prepares for a clean gas platform of the future

- Gasgrid explores **extending the methane transmission network** to meet the growing need for e-methane and biomethane transmission
- Aim is to strengthen the **vitality of the gas market**, ensure **reliable energy supply** and support Finland's **security of supply**
- If implemented, the extension would be completed within 5–10 years in **the early 2030s**
- Extension follows the **planned hydrogen network route**, but hydrogen and methane gas require their own separate pipelines
- In the hydrogen value chain, **hydrogen serves as a raw material for clean gases** such as **e-methane**, creating significant synergies between hydrogen and methane
- National **market survey for methane transmission needs** opened in April 2026



# Gasgrid studies methane transmission needs

## Market survey is open

*Gasgrid's existing over 1,150 km gas network supports industry and is part of the Finnish energy system. Gasgrid is conducting a nationwide market survey to clarify expansion needs for the methane transmission network as the role of clean gases (e-methane, biogas) is clearly growing in the Finnish and European energy systems.*

- The survey goal is to **ensure the methane network meets the needs of Finnish industry**, energy production and new gas businesses.
- The survey **collects the potential market participants' views**:
  - interest in connecting to the network (production or off-take)
  - transfer needs, possible locations, schedules and type of end use

**The survey is confidential and non-binding, and the results will be used in Gasgrid's decision-making.**

Market survey open until 12 June - <https://gasgrid.fi/> → Front Page



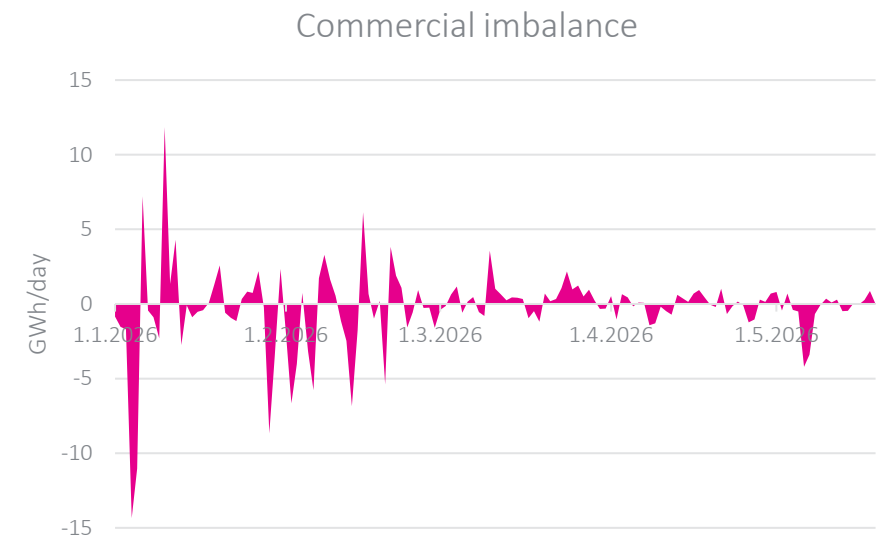
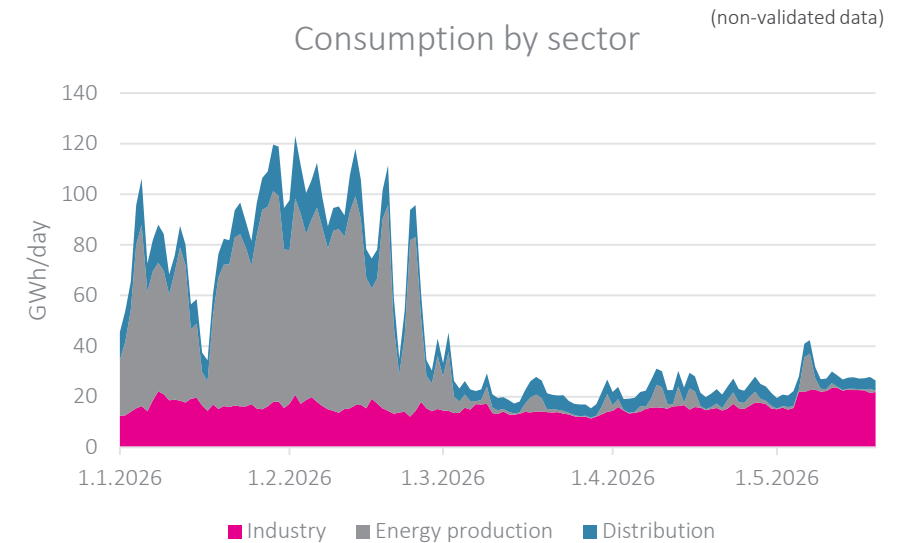


Kiitos!

Janne Grönlund ([janne.gronlund@gasgrid.fi](mailto:janne.gronlund@gasgrid.fi))

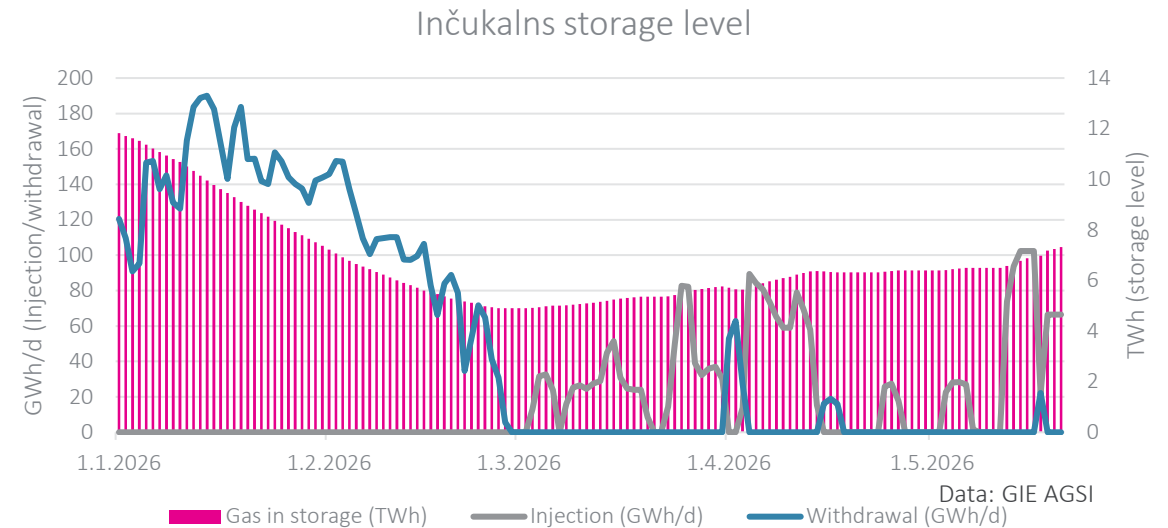
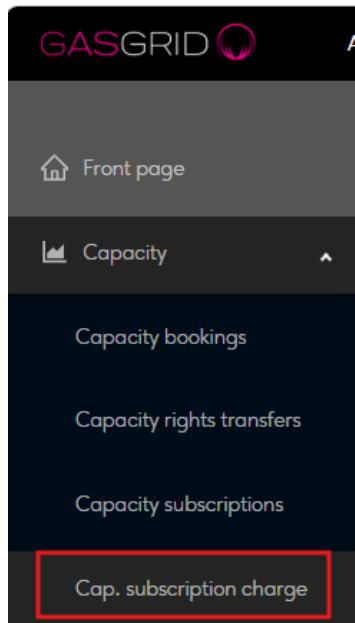
# Market update

- Consumption: 1.1.-21.5.2026  $\approx$  6,9 TWh (same period 2025  $\approx$  6,1 TWh)
  - Jan/Feb26 highest consumption since Dec21 at  $\approx$  2,5 (Jan26) and 2,4 (Feb26) TWh/month – cold and weak wind conditions
  - Mar/Apr  $\approx$  0,7 TWh/month – warmer and windier weather
  - May consumption stable at around 28 GWh/d on average
- BRP's balance management has been good during Q2 so far
  - No need for significant TSO balancing actions in Apr/May or balance gas price steering
  - From balancing and consumption perspective market status has been stable
- Currently Balticconnector net nomination direction towards south and supply to Finnish consumption mainly from Inkoo LNG terminal



# Market update

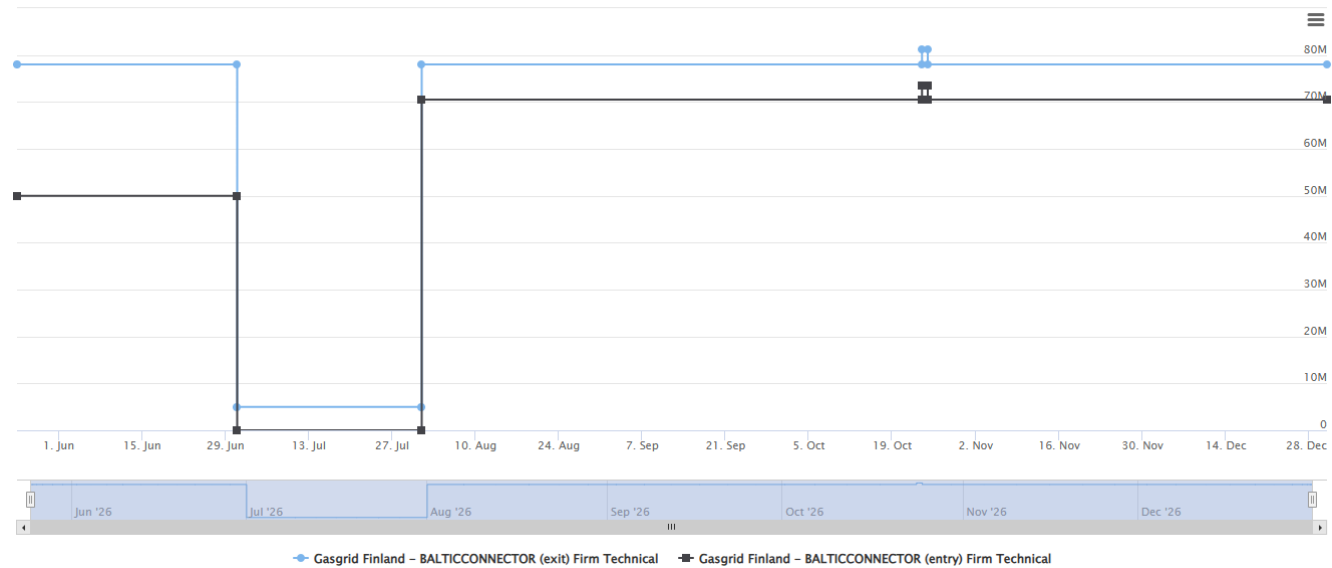
- Inčukalns storage level at Latvia:
  - After winter at the turn of Feb/Mar below 5 TWh
  - Injections started early in March
  - Current level  $\approx$  7,3 TWh (21.5.)



- Q1/26 a new functionality was added to Gasgrid portal for capacity subscription charge monitoring
- Shippers delivering gas to Finnish exit zone (end consumption) can monitor their hourly exit zone quantities and the highest peak demand of the review period
- Useful for comparing the subscribed capacity to the actual high peak
- Reconciliation invoicing for -26 will be performed in January next year

# Market update

- Balticconnector capacities:
  - Until end of June entry reduced to 50 GWh/d from the normal 70,5 due to Paldiski compressor station technical fault
  - In July planned maintenance works at LV/EE transmission systems: entry = 0 and exit = 5 GWh/d
  - When technical capacity for OTC is below 1 GWh/h (24 GWh/d), shippers can send nominations up to 1 GWh/h → if congestion, nominations reduced pro-rata
  - Virtual capacity offered to one direction based on the confirmed OTC nominations to the opposite direction (on top of the technical capacity)
  - For example, if confirmed OTC nominations to exit = 4 GWh/d this quantity is offered as virtual capacity to entry direction





# Inkoo terminal updates

25.5.2026

# Agenda

- Proposed updates to Terminal Rules for 2027
- Scheduling and Important Terminal dates for 2026



# Terminal rules schedule

- Current rules valid until 1.1.2027
- New updated terminal rules applied for 1.1.2027-1.1.2028
- Timeline; rules to be approved before Annual Allocation for 2027 starts (15.7)
- Finnish NRA (Energiavirasto) has opened the hearing for the proposed updated rules. This hearing is open until 27.5.2026



# Suggested Terminal rules updates

- Terminal fee lowered by 0,5 EUR/MWh from 2,46 to 1,96 EUR/MWh
  - A way to improve market attractiveness, support higher and more stable utilisation over time, and enable a more market-driven use of the terminal.
- Biomethane liquefaction service
  - An optional flexibility service for the conversion of a Terminal User's biomethane Proof of Sustainability (PoS) certificate into a Bio-LNG PoS certificate
  - Will be available when the terminal has the needed ISCC certification
  - Priced at 0,75 EUR/MWh
- Possibility to do ITT's between an existing terminal user and one who does not have volumes in that quarter/slot
  - Up until now only possible between Joint Users
  - Added flexibility to market participants
  - Possibility to ask Terminal Operator to relay note of interest to do an ITT to Terminal Users holding volumes in a specific slot



# Scheduling and timeline 2026

- Terminal Operator is working on a preliminary service schedule for 2027 which will be published along with the invitation for the 2027 Annual Allocation on 15<sup>th</sup> on July
  - We invite all market participants to share their wishes and ideas for the Schedule as soon as possible to the terminal operator
- Important dates in 2026
  - Annual Allocation for 2027 to be opened 15.7.2026, and volumes can be booked until 14.8.2026
  - Long Term Allocation for 2028-2032 volumes opens 15.9.2026 and volumes can be booked until 15.10.2026
  - 25.11.2026 – Deadline for publishing the Annual Service Schedule for 2027 (and announce invite for possible remaining Spot Slots)





Thank you!

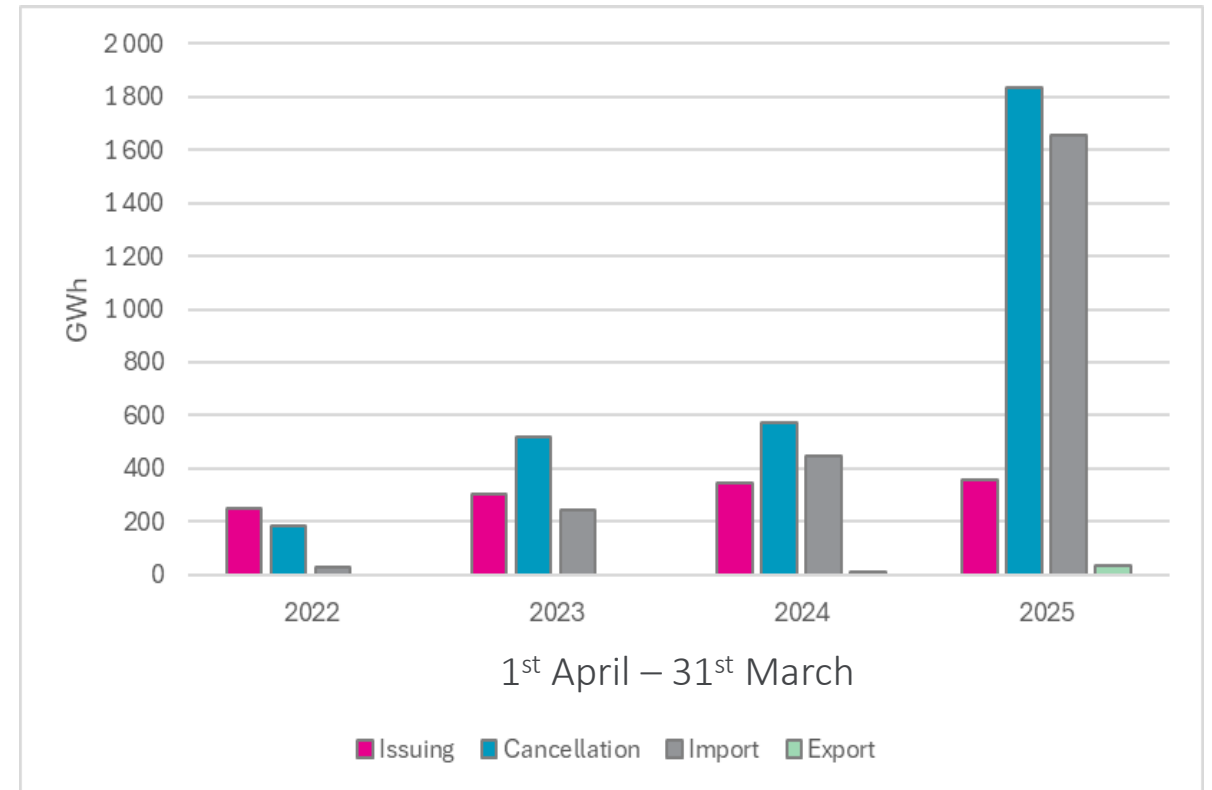
Questions?

GASGRID 

# A short update from Gasgrid

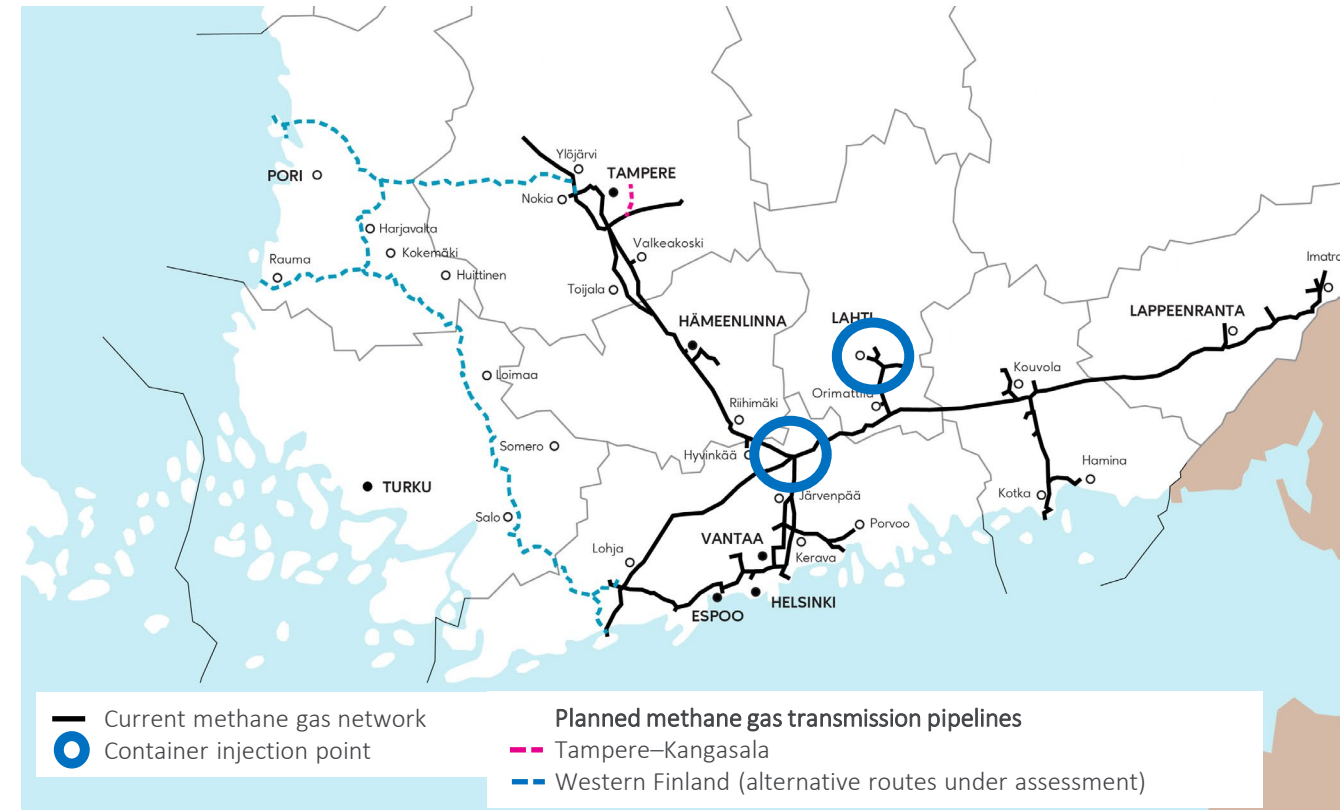
- More routes for domestic production to reach the market
- Practical tools to support renewable and low-carbon gas
- Cross-border attribute market development in Europe
- Clearer claims for customers

Guarantees of Origin in Finland



# Domestic production needs market access

- Methane network development needs
  - [National market consultation](#) open until 12 June 2026
- Container-based injection points
  - Enable injection of renewable and low-carbon gases into the grid also in areas without a direct pipeline connection
- Preliminary assessments in Western Finland
  - Production potential identified for both biogas and e-methane
  - LNG connections and export opportunities increase market interest



# Entry tariff discount – a practical TSO tool

## Discount levels

- 100 % for renewable gas
- 75 % for low-carbon gas

## Requirements

- Production in Finland
- *Direct connection* from the production plant to the Finnish gas system or gas *must be transported directly to the injection point*, and injected into the Finnish gas grid from that point



# EECS<sup>®</sup> GOs

European Energy Certificate System, AIB's **GSG** members

## Association of Issuing Bodies (AIB)

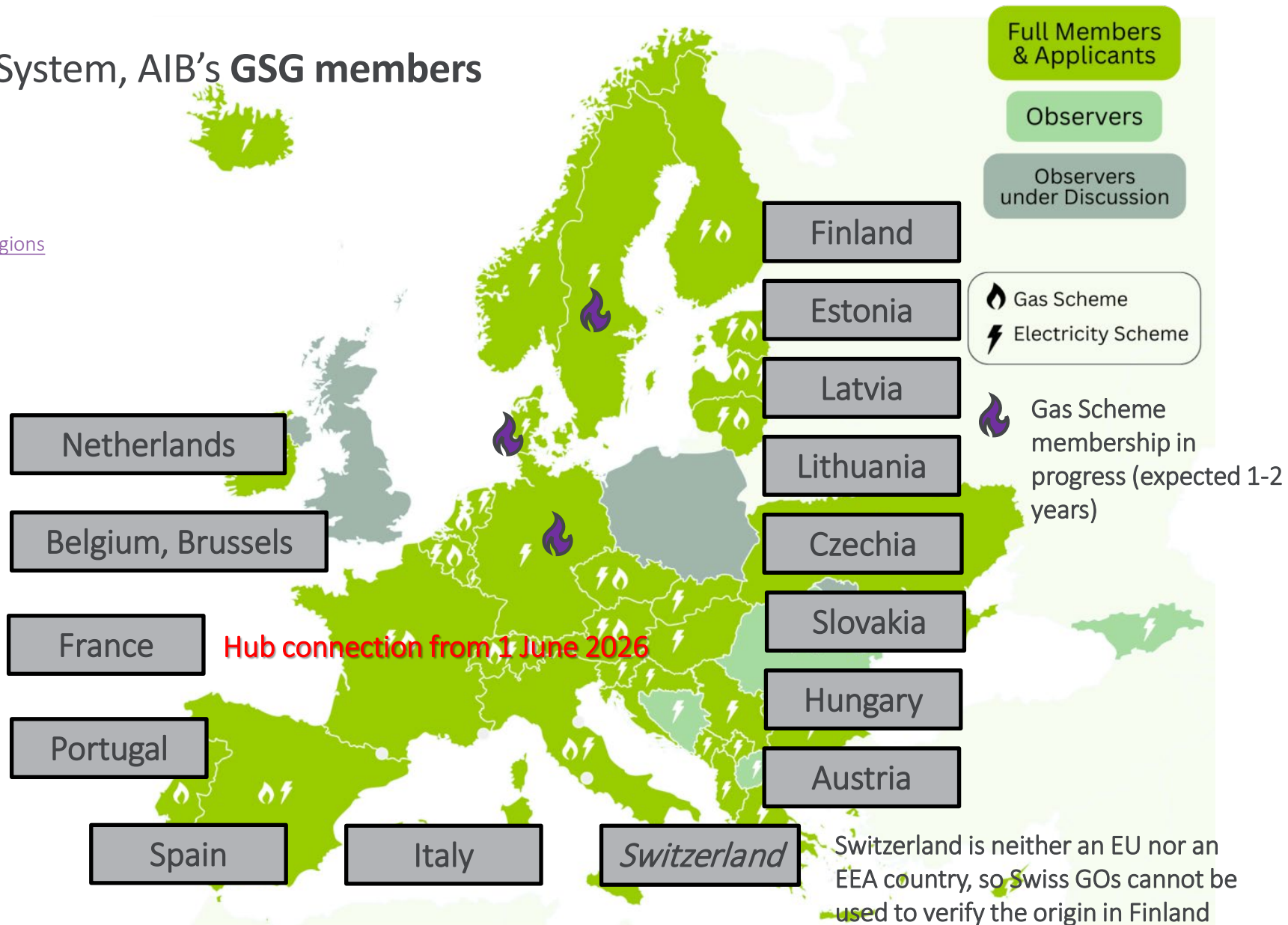
<https://www.aib-net.org/facts/aib-member-countries-regions>

<https://www.aib-net.org/>

### Ex-Domain cancellations:

- Denmark → Finland
- Finland-France agreement ends on 31 May

Germany: There is an Issuing Body (UBA Umweltbundesamt, Environment Agency), but no gas GO registry yet (expected around 2027-28)



# What we need next



- More aligned RED implementation
  - The amended Finnish GO Act is expected to enter into force on 1 January 2027
  - The Finnish information session ([link](#)) will be held on 8 June 2026 at 8:30–10:00
  - The English session ([link](#)) on 15 June 2026 at 15:00–16:00 (EET)
- Infrastructure and tariffs that support renewable production
- Clear links between GOs, PoSs and the UDB, without mixing their roles
- A common understanding of customer claims

# Next events

- Future of the Gases 4th of June in Helsinki (in Finnish) Teams stream registration is still open, invitation at Gasgrid's website: [Kaasujen tulevaisuus: Vakaa energiajärjestelmä 4.6.2026 - Gasgrid](#)
- Next Market Update 16th of June
- Next Gas Market Forum will be at fall 2026 (live event at Helsinki)

[Event recordings and materials - Gasgrid](#)

Please leave us feedback at [customerservice@gasgrid.fi](mailto:customerservice@gasgrid.fi)

Thank you for your time!

