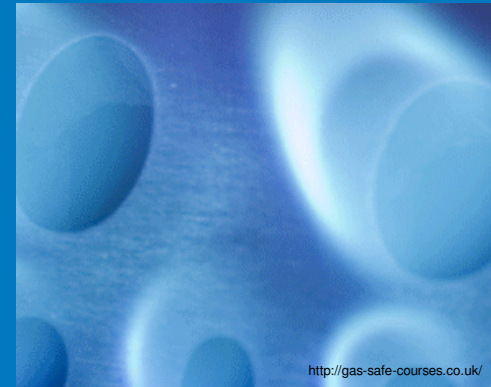
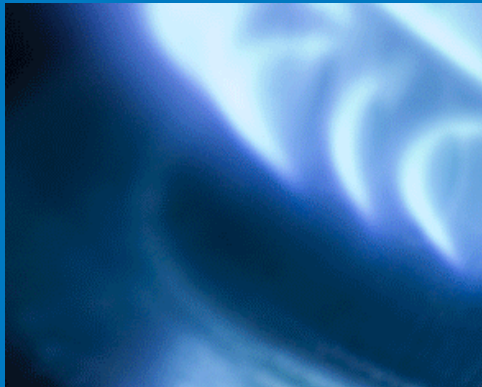


Gas Demand



Stephen Marland
Gas Demand Manager
National Grid

Gas Demand



Residential demand

Industrial & commercial demand

Power generation demand

Exports

Image – gas-safe-courses.co.uk

Residential Demand

Behaviour change

Energy efficiency

Extra demand from new houses

Changes in heating fuel



Image - psgconnect.co.uk

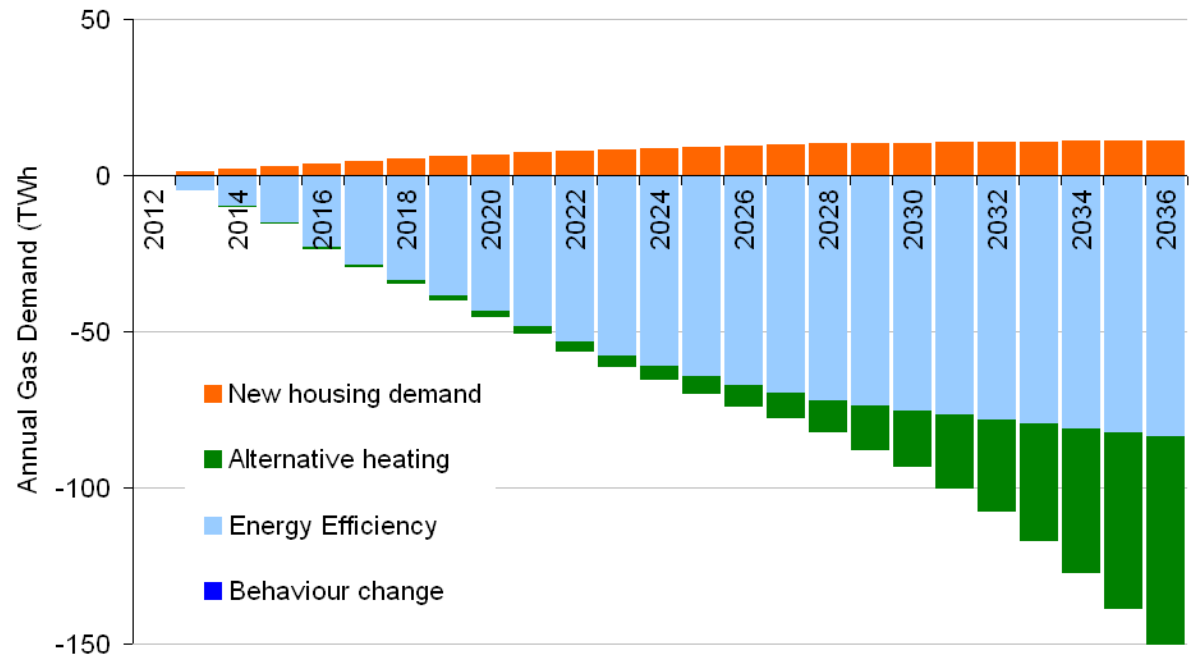
Residential Demand

Building Regulations
+ New Housing

A rated boiler
~ 40TWh reduction

GG ~ 1 million
Solid walls

GG Heat Pumps
post 2020

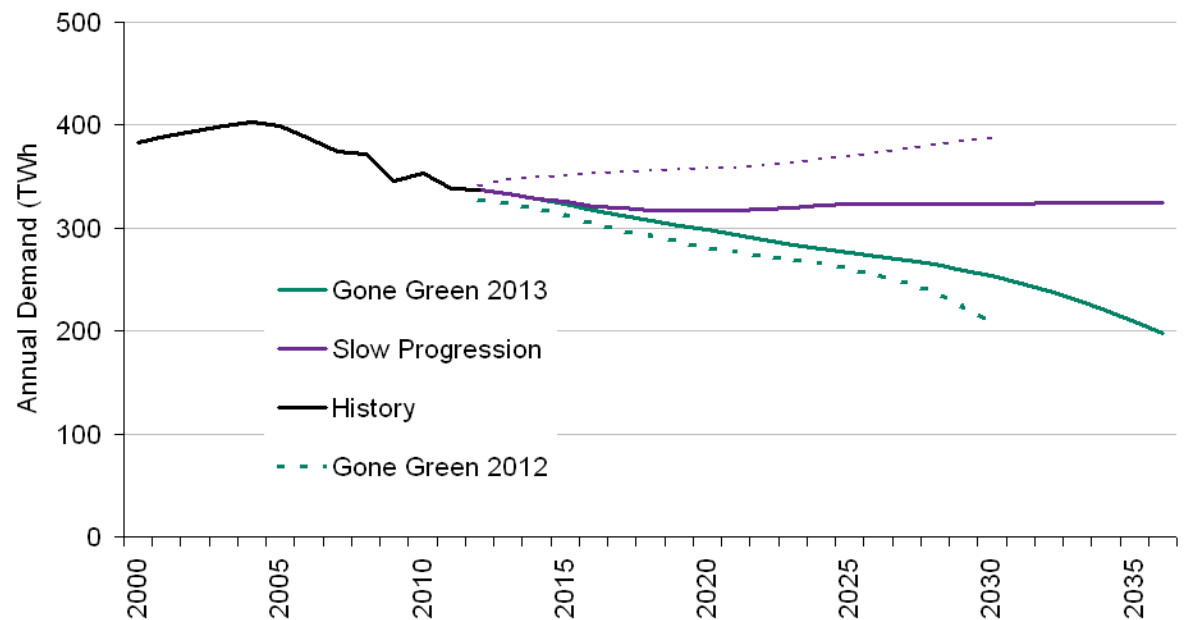


Residential Demand

Comfort Factor cap at 5% increase in demand

Slow Progression – lower than 2012 due to comfort factor

Gone Green – similar to 2012 with less aggressive uptake of heat pumps



Industrial and Commercial



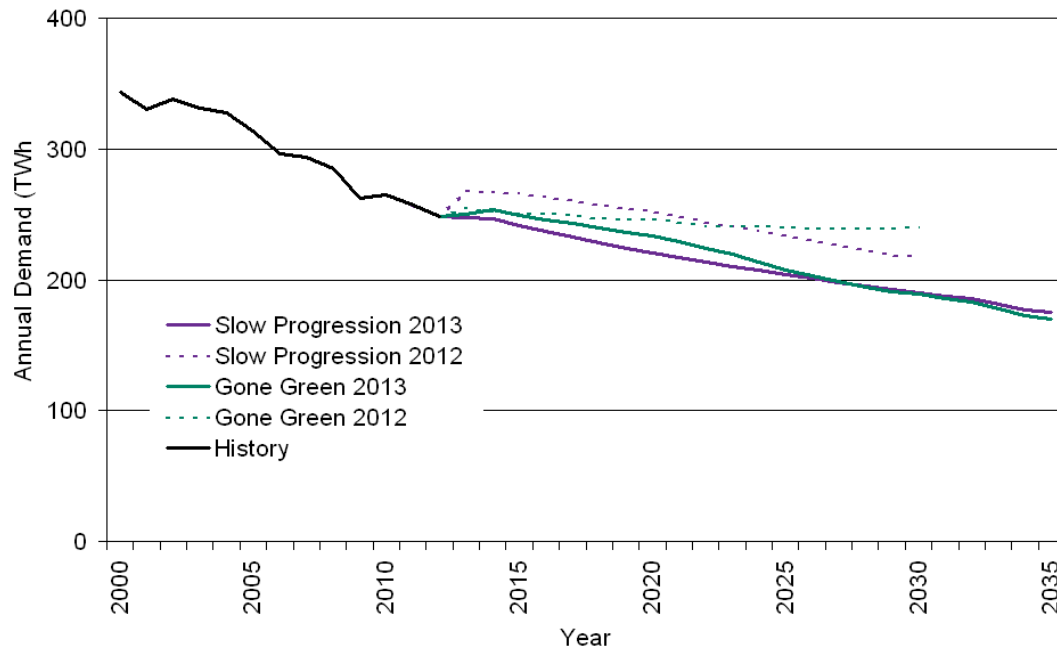
Historic demands have fallen

While the economy and gas prices increased

Recession displaced some demand

Further efficiency projected

Industrial and Commercial



Demand decline more consistent with historical trends

Gone Green - Introduction of alternative heating in commercial buildings

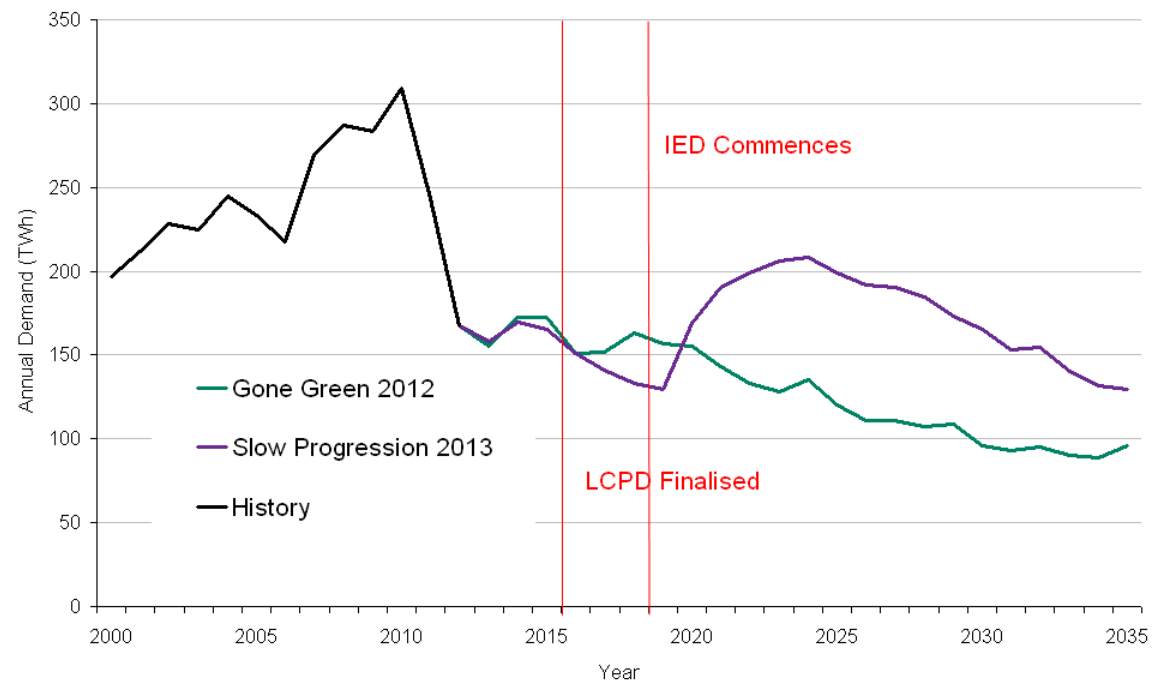
Limited alternatives for process or high temperature industry

Power Generation

Power generation driven by “generation scenarios”

Coal prices keep gas demand at low levels

Gas returns in Slow Progression with lower wind capacities post IED



Exports

Underlying demand in Ireland assumed consistent with Great Britain demand scenarios

Long term projections include increasing power generation demand in Ireland

Indigenous supplies offset some exports in 2016/17

Timing is everything.....

