

## Gas overview 2022

### **9% fall in annual consumption, 12% increase in gas transit and acceleration in the energy transition for gas**

- A 9% fall in gas consumption in 2022 thanks to milder weather, higher prices and lower consumption on the part of consumers (under the impetus of the government's energy efficiency plan), partly offset by increased consumption by gas-fired power plants
- European flows have reversed and are now west to east, France is playing an essential role in securing supplies / increase in flows transported by GRTgaz (708 TWh, up from 630 TWh in 2021)
- The gas transition is picking up pace against a new geopolitical backdrop: 2.5 TWh of renewable gas is being added every year, regional hydrogen hubs are being developed and we have a political agreement for a transnational hydrogen infrastructure project in Europe (H2Med project)

**Thierry Trouvé**, Chief Executive Officer of GRTgaz said: *"In just a few months, the French gas system has been able to adapt to a new geopolitical backdrop, guaranteeing continuity of supply for consumers, while at the same time playing its part in European energy solidarity. The historical inversion of flows (from Western to Eastern Europe) and increased imports of LNG are features of this new energy landscape. At the same time, GRTgaz remains committed to the energy transition. Evidence of this can be seen in the sustained development of renewable gas production in 2022 and the decision to launch a European infrastructure project to transport hydrogen from Portugal to Germany via France and Spain – a decision that was made at the highest levels of the various countries concerned"*.

### **A robust French and European gas system which has managed to adapt to an energy landscape marked by war in Ukraine.**

The dramatic fall in Russian gas imports to Europe in 2022 (a 62% fall over the year, with imports practically stopping altogether from the summer onwards) has led to a reconfiguration of gas flows across the French transport network, without any supply disruptions.

Flows of Liquefied Natural Gas (LNG) to France increased by 102%. This makes France a key point of entry for LNG to Europe. 370 TWh of LNG were delivered to France in 2022 (up from 183 TWh in 2021), and 278 TWh of gas via pipeline (down from 350 TWh in 2021).

Flows were inverted at the French borders to help other European countries: 158 TWh of gas flowed from France to Switzerland, Italy, Belgium and Germany in 2022 (up from 42 TWh in 2021). Sending gas to Germany from October onwards was made possible by the work carried out on the Obergailbach reverse-flow stations.

In total, 708 TWh of gas were transported in France by GRTgaz, up from 630 TWh in 2021.

### **A 9% fall in French consumption in 2022**

2022 will go down as the hottest year ever recorded by Météo France – 1.58°C warmer on average than 2021<sup>1</sup>. Warmer weather, together with the efforts to which consumers went to reduce their own energy consumption (the result of increased societal awareness) and a reduction in consumption because of higher energy prices all combined and resulted in a 16.6% fall in public distribution consumption compared with 2021 (253 TWh in 2022, down from 303 TWh in 2021).

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<sup>1</sup>Average annual weighted consumption

Climate-adjusted, this is a 6.2% fall in public distribution consumption over the whole year.

Demand for gas from manufacturers also fell – by 11.8%<sup>2</sup> in most sectors. This can be attributed to higher prices, greater energy efficiency in certain industries and economic constraints (supply difficulties, inflation affecting the prices of raw materials and lower demand). Consumption on the part of manufacturers stood at 112.2 TWh in 2022, down from 129.6 TWh in 2021<sup>2</sup>. The industrial sectors that reduced their consumption the most were metallurgy, refining / petrochemicals and non-metallic materials and porcelain (a 19% reduction for each of those three sectors). Those which did not succeed in reducing their consumption (or only by very little) were the paper-cardboard (+1%), agrifoods (-3%) and glass (-5%) sectors.

Gas-fired electricity generation plants increased their consumption dramatically (by 54.4%) in 2022 to hit a historical record of 61 TWh (up from 39 TWh in 2021). This was to offset the unavailability of France's nuclear facilities.

### **Continuing drive to develop renewable gas, despite concerns for the future**

Biomethane continues to have impetus: 149 new methanisation sites were opened in 2022, injecting gas into the French networks. 17 are connected up to the GRTgaz network. In total, France now has 514 methanisation sites.

Annual production capacity reached 9 TWh – 2.5 TWh more than in 2021. Connected sites produced 7 TWh of renewable gas in France. This is higher than the targets set by the multiannual energy programme. This target is 6 TWh for 2023.

GRTgaz is continuing to adapt its network. As of the end of 2022, it had 12 reverse-flow stations in operation (an increase of 7 reverse-flow stations over the year). These facilities are used to send local surpluses of biomethane to the national gas transport network.

Other renewable gas sectors are continuing with their own pre-industrial development (pyrogasification, which involves heating unrecovered solid waste and converting it into gas, and hydrothermal gasification, which involves converting wet biomass into synthetic gas). A call for expressions of interest launched by the CSF NSE<sup>3</sup> to take stock of the pyrogasification sector confirmed that a French ecosystem is in place and is ready to be industrialised. It counted a total of 49 projects in France; the first projects are starting to be listed on the capacities register (3 pyrogasification projects and 3 methanisation projects), with a view to being connected up to the gas network.

### **Emergence of regional and transnational hydrogen transport infrastructure**

2022 will be remembered as the year that saw real progress in creating a future French and European hydrogen market.

GRTgaz is playing its part in developing hydrogen valleys in major French industrial areas. Several regional projects have been identified at varying levels of maturity (including [MozaHYc](#), [HYnframed](#) and [RHYn](#)).

At the same time, GRTgaz is gearing up to develop a future interconnected European hydrogen transport network. The purpose of the H2 MED project is to leverage renewable hydrogen production potential in southern Europe; it was launched in December 2022 by France, Spain and Portugal. Germany signed up to it more recently. It will involve the construction of the BarMar hydrogen transport infrastructure (Barcelona to Marseille), connecting up the Iberian Peninsula to France. It will then be extended to Germany, serving a number of industrial valleys in the process of being developed in France.

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<sup>2</sup> Figure for GRTgaz level

<sup>3</sup>Strategic New Energy Systems Sector Contract



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GRTgaz is Europe's second-largest gas carrier, with 32,618 km of pipes and 640 TWh of gas transported. The company has 3330 employees and generated nearly €2.1 billion in turnover in 2022. GRTgaz has a mission statement: "Together, we enable an energy future that is safe, affordable and climate neutral". GRTgaz is an innovative company undergoing a major transformation to adapt its network to new ecological and digital challenges. It is committed to a 100% carbon-neutral French gas mix by 2050. It supports the hydrogen and renewable gas sectors (biomethane and gas from solid and liquid waste). GRTgaz carries out public service missions to guarantee the safety of gas transmission for its 879 clients (shippers, distributors, industrial companies, biomethane plants and producers). With its subsidiaries Elengy, the European leader in LNG terminal services, and GRTgaz Deutschland, operator of the MEGAL transmission network in Germany, GRTgaz plays a key role on the European gas infrastructure scene. The company exports its know-how internationally, in particular services developed by its research centre, RICE. Find us at <https://www.grtgaz.com/>, on Twitter, on LinkedIn, Instagram and on Facebook.

