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The Central European Natural Gas Market in 2026

The Central European natural gas market will play a crucial role in ensuring the region's overall energy security in 2026. Following the supply shock triggered by Russia's full-scale invasion of Ukraine in 2022, countries in the region have gradually adapted their supply models to the new geopolitical realities. A key element of this transformation has been liquefied natural gas (LNG), whose growing availability on the global market – combined with the rapid expansion of import infrastructure – has enabled countries to reduce the risks associated with traditional eastern supply routes. In the coming years, the regional gas market will be shaped by the expansion of LNG supply, changes in sanctions policy toward Russia, evolving trends in demand, and the development of regional interconnection systems.

LNG and infrastructure as the foundation of a new security model. The projected growth in global LNG supply is one of the main stabilising factors for the European gas market in the 2026–2028 outlook. LNG imports to Europe in the first quarter of 2026 are expected to rise by an average of 14% year-on-year, reaching more than 518 mcm per day. This trend is driven by the commissioning of new export capacities, primarily in the United States, where the Golden Pass LNG project in Texas will significantly boost global supply.

In Central Europe, LNG deliveries have become the backbone of regional gas market operations, replacing Russian pipeline gas within just a few years to become the primary source of supply. Apart from Romania and Poland (["IEŚ Commentaries," no. 598](#)), countries in the region do not possess significant domestic production capacity, relying instead on an increasingly developed network of regasification terminals located in Poland, Croatia, and Lithuania. After the expansion of its regasification capacity to 8.3 bcm per year, the LNG terminal in Świnoujście now functions as a key entry point for natural gas into the Central European system, serving not only the Polish market but also the Czech Republic, Slovakia, and Ukraine. The planned FSRU terminal in the Gdańsk region (with a capacity of 6.1 bcm per year) will further strengthen Poland's role as the region's primary LNG import hub (["IEŚ Commentaries," no. 829](#)). In the north, the importance of Lithuania's Klaipėda terminal continues to grow – it has become not only an alternative to Russian supplies for the Baltic states but also a functional support point for Poland and Ukraine, as illustrated by the first deliveries of U.S. LNG executed by the Ukrainian energy company DTEK¹.

At the same time, the terminal on Croatia's Krk island has increased its regasification capacity to 6.1 bcm per year, becoming an important supply source for Southeast Europe and parts of Central Europe². In practical terms, the region has gained access to two independent LNG import axes – north and south – which significantly enhances resilience to supply disruptions. Cross-border interconnections play a pivotal role by allowing gas to be transported from terminals to inland consumers; without these links, the global LNG oversupply would not translate into genuine security of supply.

In the coming years, infrastructure constraints will continue to shape regional LNG utilisation. Capacity limitations, tariff differentials, and the ability to engage in short-term cross-border trading increasingly determine prices and supply availability in individual Central European states. As a result, the region functions as

¹ N. Buli, *Ukraine's DTEK imports its first US LNG via Lithuania*, 18.11.2025, <https://www.reuters.com/business/energy/ukraines-dtek-imports-its-first-us-lng-via-lithuania-2025-11-18/> [21.01.2026].

² The additional capacity will be made available as of 3 February 2026. LNG Hrvatska, *Notice on the start of the Auction for the allocation of additional regasification capacities of LNG Terminal*, 2.01.2026, <https://lng.hr/en/2026/01/02/notice-on-the-start-of-the-auction-for-the-allocation-of-additional-regasification-capacities-of-lng-terminal-2/> [21.01.2026].



an interconnected system in which infrastructure advantages in one country directly influence the energy security of others.

The growing importance of Norway, the U.S., and Azerbaijan in supply structures. Parallel to the expansion of LNG, three key supply routes – Norway, the United States, and Azerbaijan – are gaining significance in Europe's natural gas mix. Norway remains the largest supplier to the European Union, covering approximately 30% of its demand. Although output on the Norwegian Continental Shelf slightly declined in 2025 when compared to the 2024 peak, projections for 2026–2029 suggest stable production supported by new investment projects and extended field lifecycles. At the same time, the United States continues to strengthen its position as the dominant LNG supplier to Europe. With relatively low prices across Asian markets and highly flexible contractual terms, Europe – including Central Europe – remains an attractive destination for U.S. LNG exporters. Azerbaijan is also expanding its foothold in the European market. The start of deliveries to Austria and Germany from 2026 ([“IEŚ Commentaries,” no. 937](#)) confirms its ability to further increase exports. Although volumes from Azerbaijan remain modest compared to Norway and the U.S., their importance lies in diversifying supply routes, especially for countries such as Hungary, Slovakia, and Romania.

Regional demand and the changing role of natural gas. Central European countries, like the rest of the EU, are experiencing a structural decline in gas consumption – although the pace varies across the region. The energy-intensive industrial sector, historically crucial in Central Europe, has not fully recovered from the price shock of 2022–2023. In many cases, persistently high electricity prices led to permanent reductions in output or even relocation of production. Households and municipal sectors are also gradually lowering gas use, driven by improved energy efficiency and the adoption of alternative heating technologies.

The role of natural gas is also being redefined in the power sector. In Central European countries where the energy mix still relies heavily on coal, natural gas has not become a baseload fuel. Instead, it increasingly serves as a transitional and balancing resource. The growing share of renewable energy sources – especially wind and solar – reduces the operating hours of gas-fired units, making gas demand more variable and harder to forecast.

As a consequence, demand flexibility and short-term market mechanisms are gaining importance. For Central Europe, this means greater sensitivity to weather conditions and price shifts in neighbouring regions. Natural gas is used less frequently as a stable, predictable fuel and more often as a system-stabilising resource during peak demand periods or low renewable output.

Conclusions:

- The projected increase in global LNG supply, coupled with expanding import infrastructure in Central Europe, will significantly strengthen the region's resilience to supply shocks. The terminals in Świnoujście, Krk, and Klaipėda collectively form a multi-directional security system that reduces the risk of dependence on any single supplier.
- The geographic and political diversification of natural gas supply to Central Europe will continue to expand. Norway, the United States, and Azerbaijan have replaced Russia not only in terms of supply volumes but also within the long-term energy strategies of the region's states.
- Central Europe has rapidly transformed from a region dependent on a single supply route into one built on LNG, together with dense interconnection networks. While this shift enhances resilience, it also increases reliance on the performance and availability of infrastructure.
- The region's role as a transit and distribution hub will continue to grow. The integration of gas markets in Poland, Slovakia, Ukraine, and the Baltic states supports the emergence of a new regional architecture in which energy security depends on flexibility, LNG, and interconnected systems – rather than on a single dominant import direction.