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Europe's Approach to Natural Gas Supplies from Russia

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European countries have been reducing their purchases of Russian natural gas since Russia launched its full-scale war against Ukraine. However, the pace of this process has varied. In the first nine months of 2026, European Union member states imported approximately 11% more Russian liquefied natural gas (LNG) than in the same period of the previous year, despite the announced ban on imports from Russia scheduled to take effect on 1 January 2027. In addition, some countries continue to receive Russian natural gas through the TurkStream pipeline. The persistence of these ties highlights the tension between the shared objective of reducing dependence on Russia and the differing circumstances shaping individual countries' energy policies. A common policy direction does not, therefore, imply a uniform pace of implementation or an immediate end to trade relations.

Sanctions have not brought trade to an end. Supplies of liquefied natural gas (LNG) to EU member countries have continued during preparations for the import ban, which is due to take effect on 1 January 2027. Between January and September 2026, Belgium, France, Spain, the Netherlands, Portugal, and Italy purchased Russian LNG. Total deliveries amounted to approximately 16.35 billion cubic metres, bcm (12.02 million tonnes), an increase of around 1.58 bcm (1.16 million tonnes) compared with the same period a year earlier. This means that, despite more than four years of war, some EU member states continue to maintain energy ties with Russia, albeit at substantially lower supply volumes: in 2021, European imports of Russian natural gas totalled approximately 155–160 bcm. These are not new buyers, but countries that also participated in this trade in previous years. Between the beginning of 2025 and 30 October 2025, France received approximately 5.2 million tonnes of Russian LNG, Belgium around 3 million tonnes, Spain around 2 million tonnes, the Netherlands around 1.2 million tonnes, Portugal around 0.14 million tonnes, and Italy around 0.10 million tonnes. Almost all these cargoes originated from the Yamal LNG project. Receiving terminals included Zeebrugge in Belgium, Dunkirk and Montoir-de-Bretagne in France, Gate in the Netherlands, and Bahía de Bizkaia Gas in Spain. However, the unloading location does not necessarily indicate the country in which the natural gas is ultimately consumed. The key issue is therefore the persistence of trade ties, which clearly did not disappear when the shared objective of reducing energy cooperation with Russia was adopted.

The Russian authorities portray the increase in purchases as evidence of sustained demand for Russian natural gas. In remarks published on 18 October 2026, Deputy Prime Minister Alexander Novak pointed to rising Russian LNG deliveries to Europe and suggested that European buyers were increasing purchases to replenish stocks ahead of the import ban taking effect on 1 January 2027. Since 25 April 2026, the ban has applied to deliveries under short-term contracts, while the transitional period for certain long-term contracts concluded before 17 June 2025 will end on 1 January 2027. The ban taking effect on that date is therefore intended to end Russian LNG imports into the EU, but will not immediately sever all trade ties. The sanctions package adopted in July 2026 allows EU companies bound by long-term contracts to redirect some deliveries to markets

outside the EU until at least the end of July 2027. These companies will therefore be able to continue trading in Russian LNG, but this provision will not permit them to import it into the EU market.

A different route, the same supplier. While the timing of the import ban is the central issue for LNG, the key change in pipeline supplies has been the reconfiguration of transmission routes. The cessation of Russian natural gas transit through Ukraine on 1 January 2025 did not bring deliveries to Europe to an end. Some European buyers, particularly Hungary and Slovakia, continue to import Russian natural gas through TurkStream and its connecting pipelines. This route remains operational for Russian pipeline natural gas deliveries to the EU, with no natural gas flowing through Nord Stream 1, Nord Stream 2, the Yamal–Europe pipeline, or Ukrainian territory. The natural gas enters the EU through Bulgaria and is then transported onwards to other countries. Rerouting supplies has preserved ties with the existing supplier but has not diversified supply sources.

The decline in Russian natural gas deliveries to the EU does not imply an even reduction in energy dependence across member states. Estimated deliveries fell from 27.93 bcm in 2024 to 18.22 bcm in 2025, yet substantial supply ties remained in Hungary (7.75 bcm), Greece (4.089 bcm), Bulgaria (3.431 bcm), and Slovakia (2.932 bcm). At the same time, TurkStream has enabled deliveries to continue following the closure of the route through Ukraine. Russia's diminishing presence in the EU market thus coexists with the persistence of some regional energy ties.

Countries are moving away from Russia at different speeds. This divergence is particularly evident in Central and South-Eastern Europe, where there is no single pattern of energy relations with Russia. Hungary continues to receive natural gas through the TurkStream pipeline, as does Slovakia. Bulgaria, meanwhile, serves as the entry point through which the natural gas reaches the EU before flowing onwards to other buyers. The EU's common policy therefore encompasses countries occupying different positions within the regional supply system.

Serbia, North Macedonia, and Bosnia and Herzegovina also continue to purchase Russian natural gas. Supplies reach Serbia and North Macedonia via Bulgaria, and Bosnia and Herzegovina via Serbia. Estimated annual deliveries to Serbia amounted to approximately 2.5 bcm in 2024 and 2.1 bcm in 2025. The corresponding figures were approximately 0.3 bcm and 0.2 bcm for North Macedonia, and 0.25 bcm and 0.26 bcm for Bosnia and Herzegovina. The continuity of these ties is further illustrated by Serbia's extension of its agreement with Gazprom on 30 September 2026 until the end of 2026. The annual volume of 2.2 bcm stipulated in the agreement reflects contractual commitments rather than actual purchases in 2026. Reducing Russia's presence in the EU market is therefore not equivalent to its withdrawal from the wider network of European energy ties.

Moldova presents a different picture, as the part of the country on the right bank of the Dniester ceased purchasing natural gas directly from Russia in late 2022. The separatist region of Transnistria, which forms part of Moldova's internationally recognised territory, continued to receive natural gas via Ukraine until the end of 2024. Supplies resumed in February 2025 through a European intermediary under a Russia-backed arrangement. Russia's involvement in that arrangement does not, however, establish the origin of the natural gas.

Conclusions

- EU member states have reduced their energy cooperation with Russia but have not completely severed these ties. Indeed, purchases of Russian LNG increased by approximately 11% in the first three quarters of 2026. Higher trade volumes may have reflected both efforts to accelerate deliveries ahead of the ban taking effect on 1 January 2027 and the fulfilment of existing contracts, alongside limited flexibility in switching suppliers. The persistence of trade relations indicates that the adoption of

restrictions did not immediately end energy dependence. Their effects should, therefore, be assessed in light of the transitional periods and the scope of the restrictions in force.

- The cessation of natural gas transit through Ukraine did not bring purchases from Russia to an end. TurkStream continues to enable natural gas deliveries to Hungary and Slovakia, as well as to Serbia, North Macedonia, and Bosnia and Herzegovina, among other countries. A change in supply routes is therefore not equivalent to achieving independence from the Russian supplier.
- Europe is not moving away from Russian natural gas at a uniform pace; six EU member states continued to receive Russian LNG in the first three quarters of 2026, some countries in Central and South-Eastern Europe continue to purchase pipeline natural gas, and the separatist region of Transnistria still imports natural gas in cooperation with Russia. These differences reflect not only varying rates of progress in reducing dependence on Russia but also differences in national energy policy objectives. While the EU seeks to end Russian natural gas imports, continued cooperation with Russia by some non-EU countries limits the reach of this shift across Europe as a whole.