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Electricity and Gas Retail Market Volume

February 2018

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Figure 1, Page 7: Trends in final electricity prices for household and industrial consumers in EU MSs and Norway - 2008-2016 (euro cents/kWh and index change, 2008 = 100)

Source: ACER calculations based on Eurostat (17 July 2017)

	2008	2009	2010	2011	2012	2013	2014	2015	2016
Electricity HH prices	16.24	16.40	17.05	18.25	19.26	20.12	20.58	20.965	20.53
Electricity IND prices	10.14	10.34	10.18	11.01	11.49	11.73	11.71	11.545	10.73
Electricity HH index (2008 base year)	100.00	100.95	104.96	112.38	118.57	123.89	126.69	129.09	126.42
Electricity IND index (2008 base year)	100.00	102.02	100.39	108.63	113.37	115.74	115.54	113.91	105.82

Figure 2, Page 8: Final prices in nominal and real terms for electricity household consumers in EU MSs and Norway - 2016 (euro cents/kWh)

Source: ACER calculations based on Eurostat (17 July 2017)

Member State	Real	Nominal
NORWAY	11.31	15.73
FINLAND	12.68	15.43
LUXEMBOURG	14.40	16.98
NETHERLANDS	14.84	16.06
SWEDEN	15.26	19.28
MALTA	15.77	12.66
FRANCE	15.78	16.98
United Kingdom	16.77	18.91
ESTONIA	16.98	12.23
CYPRUS	17.81	15.74
AUSTRIA	18.88	20.22
HUNGARY	19.89	11.20
LITHUANIA	20.02	12.01
BULGARIA	20.49	9.47
SLOVENIA	20.68	16.24
GREECE	20.84	17.20
CROATIA	21.00	13.21
IRELAND	21.61	23.29
CZECH REPUBLIC	22.31	14.21
SLOVAKIA	22.71	14.80
DENMARK	23.45	30.86
ITALY	24.28	23.77
LATVIA	24.48	16.26
BELGIUM	24.60	26.45
POLAND	24.78	13.42
SPAIN	25.12	22.35
ROMANIA	25.68	12.47
GERMANY	28.76	29.73
PORTUGAL	29.79	23.24

Figure 3, Page 8: Trends in final electricity prices for household and industrial consumers in EnC CPs - 2013-2016 (euro cents/kWh and index change, 2013 = 100)

Source: ACER calculations based on Eurostat (14 June 2017), NRAs, EnC Secretariat

	Electricity HH prices	Electricity IND prices	Electricity HH index (2013 base year)	Electricity IND index (2013 base year)
2013	4.42	9.12	100.00	100.00
2014	3.89	8.75	88.10	95.97
2015	4.33	6.40	98.00	70.23
2016	4.89	6.40	110.74	70.16

Figure 4, Page 9: Final electricity prices in nominal terms for household and industrial consumers in EnC CPs - 2013-2016 (euro cents/kWh)
Source: ACER calculations based on Eurostat (14 June 2017), NRAs EnC Secretariat

Household segment	2013	2014	2015	2016
ME	9.72	9.87	9.85	9.63
MD			8.50	9.43
BA	8.00	7.98	8.20	8.38
AL	7.66	7.64	8.18	8.30
MK	7.95	8.04	8.31	8.25
RS	5.86	6.02	6.10	6.48
XK*	5.61	5.69	6.20	5.91
GE	5.13	4.77	5.77	5.55
UA	2.90	2.08	1.99	2.85
Industrial segment	2013	2014	2015	2016
MD	10.92	9.81	9.37	10.25
AL	7.60	5.44	6.92	6.96
MK	8.07		7.14	6.51
UA	9.91	7.62	6.31	6.43
RS	5.89	6.05	6.85	6.29
GE	5.96		6.49	6.25
ME	7.17	6.49	6.08	6.19
XK*	5.44	5.67	5.76	5.33
BA	5.35	5.05	5.23	5.25

Figure 5, Page 10: Trends in final gas prices for household and industrial consumers in EU MSs - 2008-2016 (euro cents/kWh and index change, 2008 = 100)
Source: ACER calculations based on Eurostat (17 July 2017)

	2008	2009	2010	2011	2012	2013	2014	2015	2016
Gas HH prices	5.78	5.54	5.47	6.08	6.62	6.80	6.92	6.87	6.29
Gas IND prices	3.55	3.02	3.03	3.43	3.76	3.74	3.52	3.19	2.55
Gas HH index (2008 base year)	100.00	95.93	94.72	105.19	114.63	117.75	119.83	118.87	108.92
Gas IND index (2008 base year)	100.00	85.19	85.47	96.76	106.06	105.50	99.29	89.84	71.79

Figure 6, Page 11: Final prices in nominal and real terms for gas household consumers in EU MSs - 2016 (euro cents/kWh)

Source: ACER calculations based on Eurostat (17 July 2017)

	Real	Nominal
LUXEMBOURG	3.70	4.36
United Kingdom	4.67	5.27
ESTONIA	4.73	3.37
BELGIUM	5.02	5.41
DENMARK	5.54	7.29
IRELAND	6.08	6.65
FRANCE	6.16	6.63
LATVIA	6.25	4.15
HUNGARY	6.26	3.52
GERMANY	6.30	6.52
CROATIA	6.35	3.99
AUSTRIA	6.37	6.82
LITHUANIA	6.67	4.00
ROMANIA	6.71	3.28
SLOVAKIA	6.94	4.53
NETHERLANDS	7.33	7.94
BULGARIA	7.35	3.40
SLOVENIA	7.40	5.81
GREECE	7.48	6.08
POLAND	7.69	4.17
ITALY	8.03	7.85
SPAIN	8.62	7.67
SWEDEN	8.99	11.36
CZECH REPUBLIC	9.00	5.73
PORTUGAL	11.07	8.64

Figure 7, Page 11: Trends in final gas prices for household and industrial consumers in EnC CPs - 2013-2016 (euro cents/kWh and index change, 2013 = 100)
 Source: ACER calculations based on Eurostat (14 June 2017), NRAs, EnC Secretariat

	Gas HH prices	Gas IND prices	Gas HH index (2013 base year)	Gas IND index (2013 base year)
2013	0.99	4.58	100.00	100.00
2014	0.86	3.79	86.33	82.76
2015	1.44	3.73	145.12	81.31
2016	2.27	2.55	228.94	55.61

Figure 8, Page 12: Final gas prices in nominal terms for household and industrial
Source: ACER calculations based on Eurostat (14 June 2017), NRAs EnC Secretariat

		2013	2014	2015	2016
Household segment	Bosnia and Herzegovina	5.34	5.12	5.14	3.64
	Serbia	4.25	4.40	4.33	3.51
	Moldova	4.19	3.76	3.18	2.99
	Ukraine	0.82	0.67	1.26	2.23
	Georgia	2.36	2.22	2.07	1.99
Industrial segment	Bosnia and Herzegovina	6.42	6.21	6.22	4.72
	Serbia	4.12	4.23	4.04	3.18
	Moldova	3.74	3.36	3.02	2.77
	Ukraine	4.63	3.76	3.70	2.45

Figure 9, Page 13: POTP electricity breakdown of incumbents' standard offers for households in EU capital cities - November-December 2016 (%)

Source: ACER calculations based on price comparison tools (PCTs), incumbent suppliers' websites and NRAs, collected via AREA (2017)

	POTP (€)	Energy	Distribution network	Transmission network	Energy taxes and charges	VAT	Other taxes and charges	RES
MT	445.90	77.94%	17.27%	0.00%	0.00%	4.79%	0.00%	0.00%
CY	607.35	55.77%	20.52%	4.96%	0.00%	15.51%	0.38%	2.88%
GB	658.81	53.65%	27.65%	0.00%	0.00%	4.76%	0.00%	13.94%
GR	636.04	52.83%	15.78%	0.00%	0.00%	11.46%	5.47%	14.47%
PL	495.15	49.08%	30.45%	0.00%	0.00%	20.06%	0.00%	0.40%
IE	827.01	47.29%	25.04%	5.76%	1.93%	13.50%	0.00%	6.48%
HR	440.10	41.83%	25.90%	9.32%	0.00%	19.31%	0.00%	3.64%
HU	421.97	41.47%	32.08%	5.07%	0.00%	21.38%	0.00%	0.00%
SI	498.15	41.24%	32.59%	0.00%	2.71%	18.03%	0.09%	5.34%
EE	546.16	40.82%	29.36%	5.25%	0.00%	16.00%	2.87%	5.70%
NL	594.98	40.31%	32.04%	0.00%	7.00%	17.36%	0.00%	3.29%
FI	522.36	38.40%	24.43%	2.72%	13.59%	17.42%	0.00%	3.45%
IT	748.46	38.09%	16.31%	3.18%	11.30%	9.09%	0.00%	22.03%
CZ	510.47	37.00%	32.37%	0.00%	0.72%	17.36%	0.11%	12.44%
RO	406.00	36.79%	29.22%	5.91%	0.76%	16.67%	2.51%	8.14%
LU	650.22	36.72%	42.69%	0.00%	0.54%	7.41%	0.00%	12.65%
ES	754.91	36.10%	21.50%	4.38%	0.00%	17.36%	3.96%	16.71%
FR	601.50	35.64%	28.65%	0.00%	12.54%	14.83%	0.00%	8.35%
LT	403.62	34.90%	26.29%	8.47%	0.00%	17.36%	12.98%	0.00%
LV	578.13	34.25%	32.17%	0.00%	0.00%	17.35%	0.00%	16.23%
SK	488.73	33.68%	25.91%	0.00%	2.30%	16.67%	0.00%	21.45%
AT	720.13	30.66%	27.83%	0.00%	7.29%	16.66%	3.68%	13.87%
BE	778.52	29.95%	25.73%	4.94%	2.27%	17.11%	14.65%	5.37%
SE	579.19	29.83%	30.36%	0.00%	18.17%	20.00%	0.00%	1.63%
PT	878.81	27.55%	29.45%	0.00%	0.40%	18.16%	3.89%	20.55%
DE	1072.75	26.30%	21.89%	0.00%	0.00%	15.95%	15.14%	20.72%
NO	524.50	18.11%	48.22%	0.00%	11.82%	20.00%	0.00%	1.85%
DK	1120.90	13.19%	17.40%	2.97%	37.16%	20.00%	0.00%	9.28%

Figure 10, Page 14: POTP electricity breakdown of the incumbents' standard offers for households in EnC capitals - November-December 2016 (%)

Source: EnC Secretariat calculations, based on ACER's methodology and data provided by NRAs (2017)

	POTP (€)	Energy	Distribution network	Transmission network	Energy taxes and charges	VAT	Other taxes and charges	RES
AL	290.50	74.34%	0.00%	5.66%	0.00%	20.00%	0.00%	0.00%
XK	197.21	55.08%	29.03%	8.49%	0.00%	7.40%	0.00%	0.00%
GE	234.44	54.34%	22.92%	7.48%	0.00%	15.26%	0.00%	0.00%
MK	289.70	53.76%	20.33%	4.55%	0.00%	15.25%	0.00%	6.11%
ME	362.03	44.81%	34.44%	3.41%	0.00%	15.97%	0.12%	1.25%
BA	303.47	43.32%	34.37%	7.19%	0.00%	14.53%	0.00%	0.59%
RS	243.19	32.38%	37.51%	6.54%	5.81%	16.67%	0.00%	1.09%

Figure 11, Page 15: POTP gas breakdown of incumbents' standard offers for households in EU capitals - November-December 2016 (%)

Source: ACER calculations based on PCTs, incumbent suppliers' websites and NRAs , collected via AREA (2017)

	POTP (€)	Energy	Distribution network	Transmission network	Energy taxes and charges	VAT	Other taxes and charges	RES
AT	831.22	41.53%	29.80%	0.00%	7.72%	16.67%	4.28%	0.00%
BE	676.47	47.24%	28.41%	2.47%	2.66%	17.17%	2.04%	0.00%
BG	430.18	46.30%	34.43%	2.58%	0.00%	16.70%	0.00%	0.00%
CZ	629.54	61.87%	20.78%	0.00%	0.00%	17.35%	0.00%	0.00%
DE	768.90	51.22%	21.46%	0.00%	7.87%	16.02%	3.43%	0.00%
DK	828.47	27.57%	14.60%	0.00%	37.83%	20.00%	0.00%	0.00%
EE	474.28	67.26%	4.97%	3.69%	0.00%	16.67%	7.42%	0.00%
ES	723.18	39.67%	39.42%	0.00%	0.00%	17.35%	3.56%	0.00%
FI	1046.55	26.87%	35.04%	0.00%	18.73%	19.36%	0.00%	0.00%
FR	786.19	35.94%	28.90%	11.80%	0.00%	13.20%	10.16%	0.00%
GB	614.43	69.88%	23.36%	0.00%	0.00%	4.76%	0.00%	1.99%
GR	604.09	78.12%	0.00%	0.00%	10.43%	11.45%	0.00%	0.00%
HR	391.57	57.40%	15.52%	7.08%	0.00%	20.00%	0.00%	0.00%
HU	364.50	56.85%	16.43%	5.46%	0.00%	21.26%	0.00%	0.00%
IE	774.01	50.60%	31.54%	0.00%	0.00%	11.89%	5.97%	0.00%
IT	845.01	35.96%	22.88%	4.57%	22.08%	14.51%	0.00%	0.00%
LT	421.10	39.84%	24.06%	18.75%	0.00%	17.36%	0.00%	0.00%
LU	587.90	54.56%	36.01%	0.00%	2.02%	7.41%	0.00%	0.00%
LV	450.52	54.12%	24.88%	0.00%	0.00%	21.00%	0.00%	0.00%
NL	800.64	34.51%	15.29%	0.00%	31.44%	17.36%	0.00%	1.41%
PL	444.02	58.49%	22.81%	0.00%	0.00%	18.70%	0.00%	0.00%
PT	945.24	36.76%	33.82%	0.00%	2.81%	18.70%	7.91%	0.00%
RO	319.51	53.34%	22.46%	7.54%	0.00%	16.66%	0.00%	0.00%
SE	1415.11	29.14%	26.60%	0.00%	0.00%	20.00%	24.26%	0.00%
SI	669.43	39.37%	32.16%	0.00%	10.44%	18.03%	0.00%	0.00%
SK	513.84	49.05%	32.36%	1.93%	0.00%	16.67%	0.00%	0.00%

Figure 12, Page 16: POTP gas breakdown of the incumbents' standard offers for households in EnC capitals - November-December 2016 (%)
Source: EnC Secretariat calculations, based on ACER's methodology and data provided by NRAs (2017)

	POTP (€)	Energy	Distribution network	Transmission network	Energy taxes and charges	VAT	Other taxes and charges	RES
BA	436.81	68.91%	14.15%	0.00%	0.00%	16.94%	0.00%	0.00%
GE	212.65	56.44%	25.57%	2.73%	0.00%	15.26%	0.00%	0.00%
RS	354.95	71.50%	12.79%	6.62%	0.00%	9.09%	0.00%	0.00%
UA	285.14	73.11%	2.56%	7.92%	0.00%	16.41%	0.00%	0.00%

Figure 13, Page 17: Weighted average POTP electricity breakdown of incumbent's standard offers for households in EU capitals and Oslo - 2012-2016 (% and euro cents/kWh)

Source: ACER calculations based on the database of the Council of European Energy Regulators (CEER), PCTs, incumbent supplier's websites and NRAs, collected via AREA (2017)

	2012	2013	2014	2015	2016
Energy	40.96%	38.35%	38.05%	36.59%	35.36%
Network	27.24%	27.97%	27.29%	25.90%	26.80%
VAT	14.80%	14.98%	14.45%	15.07%	14.65%
Other taxes	10.51%	9.53%	9.51%	9.53%	9.97%
RES charges	6.49%	9.17%	10.71%	12.90%	13.22%
POTP	19.57	19.80	19.92	19.94	19.86

Figure 14, Page 18: Year-on-year changes in the final price, contestable and non-contestable components of the electricity offers for households in EU capitals and Oslo - 2015-2016 (%)
Source: ACER calculations based on CEER, PCTs, incumbent suppliers' websites and NRAs, collected via AREA (2017)

	Contestable charges	Non-contestable charges	Final price
LT	-22.17%	5.20%	-6.30%
GB	-18.86%	-6.44%	-13.54%
SI	-12.55%	-23.83%	-19.55%
IE	-11.92%	7.69%	-2.57%
ES	-11.80%	2.62%	-3.10%
BE	-7.86%	4.72%	0.60%
NL	-5.80%	-18.93%	-14.10%
LU	-5.54%	-2.42%	-3.59%
FR	-5.17%	2.97%	-0.09%
AT	-4.61%	4.62%	1.61%
DE	-4.16%	4.29%	1.93%
IT	-2.45%	-4.88%	-3.97%
RO	-2.37%	-12.11%	-8.76%
HR	-2.07%	1.59%	0.02%
HU	-1.34%	0.00%	-0.56%
PT	-0.93%	5.77%	3.84%
FI	-0.61%	4.92%	2.73%
LV	0.00%	-3.50%	-2.33%
SK	0.00%	0.28%	0.19%
CZ	0.05%	2.43%	1.54%
GR	0.10%	-0.66%	-0.26%
MT	0.74%	0.36%	0.65%
CY	2.73%	-1.97%	0.59%
DK	6.92%	1.09%	1.82%
PL	8.68%	-18.05%	-6.80%
EE	10.78%	0.00%	4.14%
SE	32.80%	-2.53%	5.88%
NO	45.39%	10.82%	15.81%

Figure 15, Page 32: Weighted average POTP electricity breakdown of incumbent's standard offers for households in EnC capitals - 2015-2016 (% and euro cents/kWh)
Source: EnC Secretariat calculations, based on ACER's methodology and data provided by NRAs (2017)

	2015	2016
Energy	47.09%	43.50%
Network	33.05%	36.56%
VAT	16.10%	15.83%
Other taxes	2.63%	2.69%
RES charges	1.13%	1.43%
POTP	3.08	3.04

Figure 16, Page 32: Year-on-year changes in the final price, contestable and non-contestable components of the electricity offers for households in EnC capitals - 2015-2016 (%)
Source: EnC Secretariat calculations, based on ACER's methodology and data provided by NRAs (2017)

	Contestable charges	Non-contestable charges	Final price
RS	-16.40%	17.24%	3.72%
ME	-4.27%	2.73%	-0.53%
AL	0.00%	0.00%	0.00%
MK	0.01%	-2.27%	-1.06%
BA	0.51%	-0.43%	-0.03%
XK	0.58%	-7.58%	-3.26%

Figure 17, Page 19: Weighted average POTP gas breakdown of incumbent's standard offers for households in capitals cities of the EU - 2012-2016 (% and euro cents/kWh)
Source: ACER calculations based on CEER, PCTs, incumbent suppliers' websites and NRAs, collected via AREA (2017)

	2012	2013	2014	2015	2016
Energy	56.46%	54.72%	53.27%	52.41%	50.06%
Network	22.45%	22.92%	23.82%	25.26%	26.91%
VAT	12.11%	12.13%	12.29%	12.98%	13.22%
Other taxes	8.98%	10.23%	10.62%	9.34%	9.81%
POTP	7.12	6.68	7.00	6.66	6.31

Figure 18, Page 20: Year-on-year changes in the final price, contestable and non-contestable components of gas offers for households in EU capitals - 2015-2016 (%)

Source: ACER calculations based on CEER, PCTs, incumbent suppliers' websites and NRAs, collected via AREA (2017)

	Contestable charges	Non-contestable charges	Final price
FI	-42.64%	15.65%	-9.15%
LT	-37.92%	14.11%	-14.45%
HR	-23.35%	-21.62%	-22.62%
SI	-21.72%	-2.07%	-10.88%
NL	-20.67%	10.61%	-2.64%
LU	-20.61%	6.81%	-10.13%
GB	-19.96%	-14.54%	-18.40%
IT	-15.07%	-4.54%	-8.61%
PL	-14.74%	-7.00%	-11.69%
SK	-13.25%	-2.86%	-8.25%
FR	-12.08%	4.76%	-1.98%
AT	-11.31%	3.68%	-3.12%
BG	-8.68%	66.57%	20.57%
CZ	-7.18%	4.77%	-2.96%
DE	-5.04%	2.10%	-1.69%
SE	-4.78%	7.05%	3.31%
PT	-4.78%	-14.65%	-11.27%
GR	-3.10%	-3.89%	-3.28%
RO	-2.40%	-15.14%	-8.79%
ES	-1.16%	-6.81%	-4.65%
IE	-0.70%	3.06%	1.12%
DK	0.00%	0.00%	0.00%
EE	0.00%	0.00%	0.00%
HU	0.00%	0.00%	0.00%
LV	0.00%	0.00%	0.00%
BE	0.77%	7.46%	4.19%

Figure 19, Page 21: Weighted average POTP gas breakdown of incumbent's standard offers for households in EnC capitals - 2015-2016 (% and euro cents/kWh)
Source: EnC Secretariat calculations, based on ACER's methodology and data provided by NRAs (2017)

	2015	2016
Energy	71.92%	73.00%
Network	11.69%	10.75%
VAT	16.39%	16.25%
Other taxes	0.00%	0.00%
POTP	2.41	1.92

Figure 20, Page 21: Year-on-year changes in the final price, contestable and non-contestable components of gas offers for households in EnC capitals - 2015-2016 (%)

Source: EnC Secretariat calculations, based on ACER's methodology and data provided by NRAs (2017)

	Contestable charges	Non-contestable charges	Final price
BA	-29.18%	-9.98%	-24.15%
RS	-25.44%	-0.67%	-19.74%
UA	30.99%	21.85%	28.40%



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