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Electricity and Gas Retail Market Volume

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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)

	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>
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)

<b>Member State</b>	<b>Real</b>	<b>Nominal</b>
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

	<b>Electricity HH prices</b>	<b>Electricity IND prices</b>	<b>Electricity HH index (2013 base year)</b>	<b>Electricity IND index (2013 base year)</b>
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

<b>Household segment</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>
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
<b>Industrial segment</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>
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)

	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>
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)

	<b>Real</b>	<b>Nominal</b>
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

	<b>Gas HH prices</b>	<b>Gas IND prices</b>	<b>Gas HH index (2013 base year)</b>	<b>Gas IND index (2013 base year)</b>
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

		<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>
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)

	<b>POTP (€)</b>	<b>Energy</b>	<b>Distribution network</b>	<b>Transmission network</b>	<b>Energy taxes and charges</b>	<b>VAT</b>	<b>Other taxes and charges</b>	<b>RES</b>
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)

	<b>POTP (€)</b>	<b>Energy</b>	<b>Distribution network</b>	<b>Transmission network</b>	<b>Energy taxes and charges</b>	<b>VAT</b>	<b>Other taxes and charges</b>	<b>RES</b>
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)

	<b>POTP (€)</b>	<b>Energy</b>	<b>Distribution network</b>	<b>Transmission network</b>	<b>Energy taxes and charges</b>	<b>VAT</b>	<b>Other taxes and charges</b>	<b>RES</b>
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)

	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>
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)

	<b>Contestable charges</b>	<b>Non-contestable charges</b>	<b>Final price</b>
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)

	<b>2015</b>	<b>2016</b>
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)

	<b>Contestable charges</b>	<b>Non-contestable charges</b>	<b>Final price</b>
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)

	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>
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)

	<b>Contestable charges</b>	<b>Non-contestable charges</b>	<b>Final price</b>
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)

	<b>2015</b>	<b>2016</b>
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)

	<b>Contestable charges</b>	<b>Non-contestable charges</b>	<b>Final price</b>
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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