Utility Regulator

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Annual Retail Energy Market Monitoring Report

Period: 01 January to 31 December 2023

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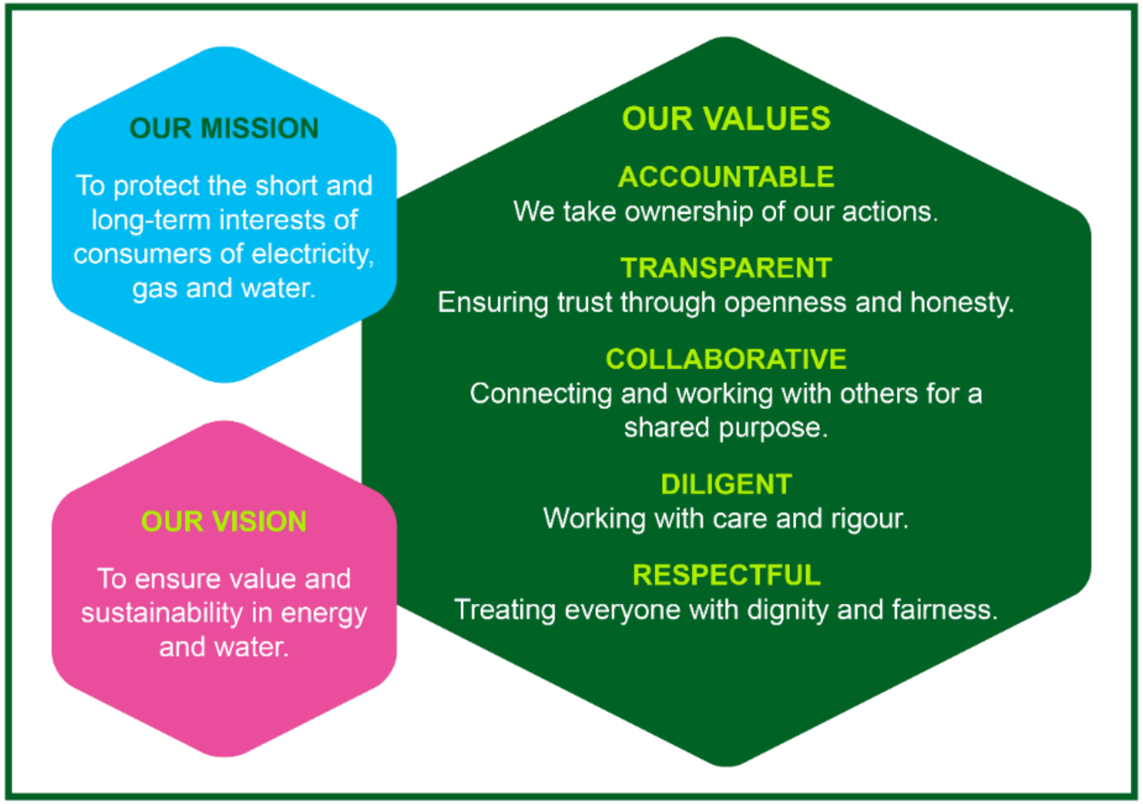
About the Utility Regulator

The Utility Regulator is the independent non-ministerial government department responsible for regulating Northern Ireland's electricity, gas, water and sewerage industries, to promote the short and long-term interests of consumers.

We are not a policy-making department of government, but we make sure that the energy and water utility industries in Northern Ireland are regulated and developed within ministerial policy as set out in our statutory duties.

We are governed by a Board of Directors and are accountable to the Northern Ireland Assembly through financial and annual reporting obligations.

We are based at Queens House in the centre of Belfast. The Chief Executive and two Executive Directors lead teams in each of the main functional areas in the organisation: CEO Office; Price Controls; Networks and Energy Futures; Markets; Consumer Protection and Enforcement. The staff team includes economists, engineers, accountants, utility specialists, legal advisors and administration professionals.



Abstract

The Annual Retail Energy Market Monitoring (AREMM) report is the latest of a series of Utility Regulator (UR) reports that provide a range of information about the retail energy market in Northern Ireland (NI).

The data relates mainly to market shares, market activity and domestic prices in the electricity and gas retail markets. The data also includes information on non-domestic, or industrial and commercial (I&C), prices.

We collect and monitor market information through the Retail Energy Market Monitoring (REMM) framework.

The information shown in this report comes from network companies, suppliers, DESNZ (Department for Energy Security and Net Zero) and Eurostat. Some figures have been calculated internally.

Audience

Electricity and gas industry, government departments, associations of consumers, regulators, statistical bodies, suppliers, potential new market entrants, consultants, researchers and journalists.

Consumer impact

The information used to produce these reports allows us to monitor the retail market, flag potential concerns and to inform regulatory decisions. All of this directly impacts on consumers.

This report increases transparency for consumers on matters of their direct interest, such as the active suppliers in each energy market sector and NI prices compared against other jurisdictions.

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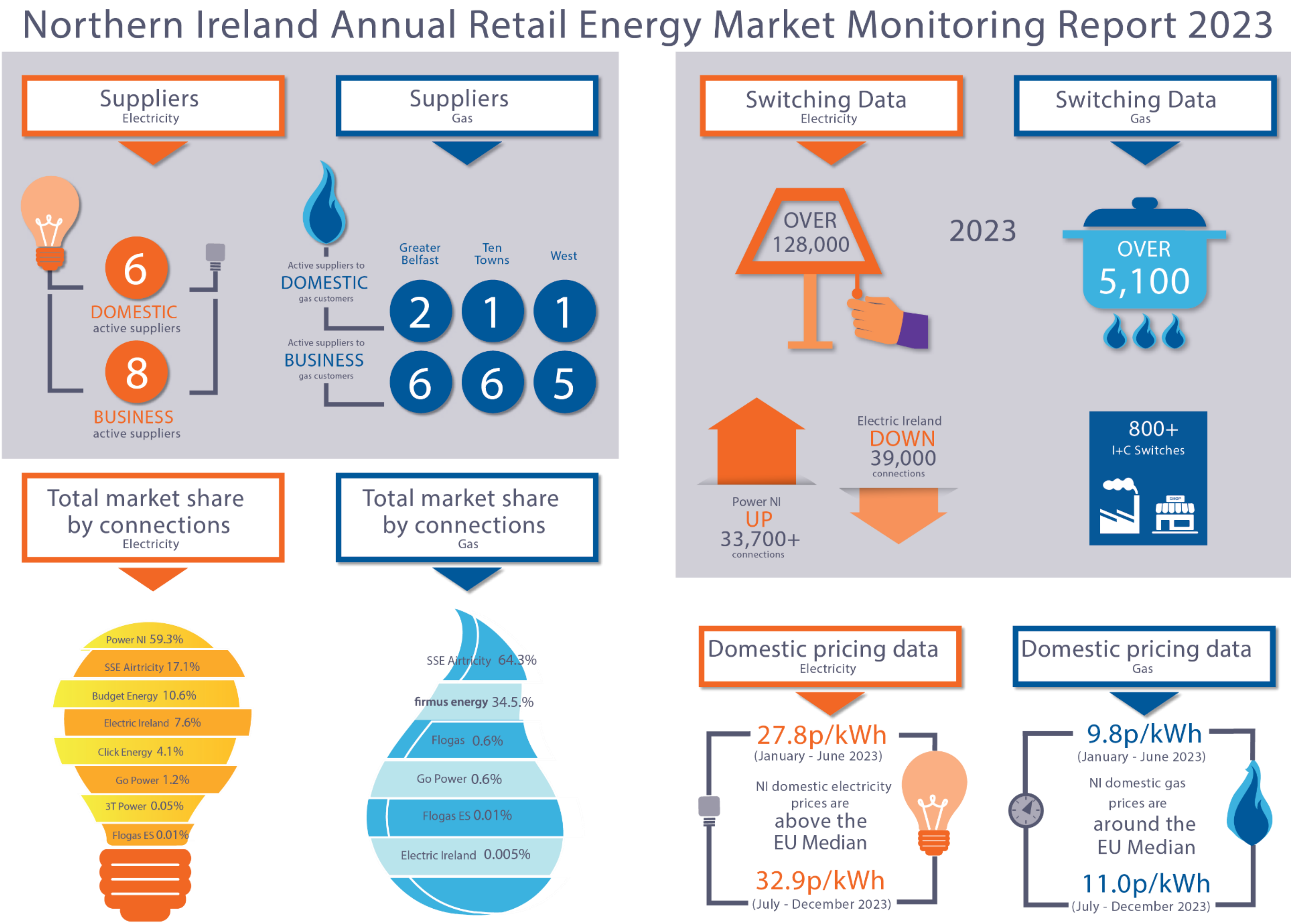

2. Key developments during 2023

1. Market activity in the **electricity** sectors shows that Power NI (the incumbent price-controlled electricity supplier) increased their market share to 59.3% of connections in 2023 compared to 56.0% in 2022.

2. Domestic **electricity** customers continue to engage in the market with over c121,000 customers switching supplier during 2023, representing 14.4% of the market (13.8% in 2022). Electricity I&C switching activity increased from c3,200 in 2022 to c7,000 in 2023.

3. In the **gas** sector, there were c5,100 switches during 2023, a decrease from c6,300 in 2022. This equates to c4,300 domestic switches (domestic switching only applies to the Greater Belfast distribution network area) and c840 I&C switches.

4. The semester 2 (July to December) 2023 **electricity pricing** data is sourced from Eurostat, DESNZ and individual supplier's submissions under the REMM framework. The pricing data for the period illustrates the following:

   - NI domestic electricity prices (32.9 p/kWh) ranked above the EU median (22.7p/kWh), below Ireland (33.3 p/kWh) and significantly lower than the UK (36.1 p/kWh).

   - The NI I&C electricity price for the very small connections was the same as Ireland at 30.4 p/kWh, which was higher than the EU median (24.1 p/kWh) and lower than the UK (33.0 p/kWh).

   - For large and very large I&C customers (c0.02% of connections) NI prices (17.4 p/kWh) were higher than the EU median (12.3 p/kWh), but slightly below Ireland (18.0 p/kWh) and below the UK (26.5 p/kWh).

5. The semester 2 (July to December) 2023 **gas pricing** data illustrates the following:

   - Domestic gas prices in NI (11.0 p/kWh) ranked above the EU median (10.5 p/kWh) and UK (7.7 p/kWh) but below Ireland (14.4 p/kWh).

   - The NI I&C gas price for the very small connections was 9.0 p/kWh, which was below the EU median (9.3 p/kWh), the UK (9.5 p/kWh) and Ireland (11.4 p/kWh).

   - For medium and large I&C customers NI gas prices (5.7 p/kWh) were higher than the EU median (5.3 p/kWh) and Ireland (5.5 p/kWh) and below the UK (6.0 p/kWh).

6. During 2023, there were c31,000 **electricity complaints** made by domestic and I&C customers and c59,700 **gas complaints** made by customers to their suppliers. This is an increase from c27,300 electricity complaints and c42,600 gas complaints during 2022. The three most common supplier complaints made during 2023 related to: bills, payments and accounts, customer service and prepayment meter issues.

3. Introduction

3.1 The purpose of this report is to deliver transparency for stakeholders and consumers, providing readers with readily accessible information on the evolution and performance of Northern Ireland (NI) electricity and natural gas retail sectors.

3.2 This report is one of the tools we use to communicate some of the main indicators we monitor in the retail energy markets. We protect consumers by promoting effective competition wherever appropriate, and by monitoring the markets[1].

Energy suppliers in NI market

	Network Operator							
	NIE Networks		PNGL[2]		FeDL[3]		Evolve (formerly SGN)[4]	
	Electricity		Gas Greater Belfast		Gas Ten Towns		Gas West	
	Dom	I&C	Dom	I&C	Dom	I&C	Dom	I&C
Budget Energy	💡	💡						
Click Energy	💡	💡						
Electric Ireland	💡	💡		🔥		🔥		🔥
firmus energy			🔥	🔥	🔥	🔥		🔥
Flogas				🔥		🔥		🔥
Go Power	💡	💡		🔥		🔥		🔥
Power NI	💡	💡						
SSE Airtricity	💡	💡	🔥	🔥		🔥	🔥	🔥
Flogas Enterprise Solutions (Flogas ES)		💡		🔥		🔥		
3T Power		💡						
Suppliers	**6**	**8**	**2**	**6**	**1**	**6**	**1**	**5**

Source: Utility Regulator

[1] Detail on the background to this report is contained in Annex A.
[2] Phoenix Natural Gas Ltd
[3] Firmus Energy (distribution) Ltd
[4] Evolve Network, previously known as SGN NG up to September 2023

3.3 The electricity and gas (in the Greater Belfast area) markets have been open to competition to domestic customers since 2007. However, there were no competing suppliers in the domestic market until 2010.

3.4 The Ten Towns area opened to gas competition for large I&C customers (those consuming over 732,000 kWh per annum) in 2012, and to domestic and small I&C customers in 2015. The first gas connection to the West gas distribution area was a large I&C user during 2017.

3.5 At the end of 2023 there were **eight** suppliers in the electricity market and **six** suppliers in the gas market although not all these suppliers are certified to operate in all sectors (or in all gas distribution areas).

3.6 The detail of the dates of entry for the suppliers in each of the retail market segments is available in Annex B of this report. For more information about the retail energy market in NI, please visit: https://www.uregni.gov.uk/supply.

4. Electricity

Electricity 2023

Total Electricity Connections
(end of Q4 2023)

919,193

843,382
Domestic connections

Domestic Credit = 459,607
Domestic Prepayment = 383,775

75,811
I&C connections

I&C <20 MWh = 53,614
I&C 20 - 49 MWh = 12,009
I&C 50 - 499 MWh = 9,149
I&C 500 - 1,999 MWh = 784
I&C 2,000 - 19,999 MWh = 238
I&C >20,000 MWh = 17

Total Electricity Consumption
(2023)

7,297.1 (GWh)

2,743.1 (GWh)
Domestic consumption

Domestic Credit = 1545.9 GWh
Domestic Prepayment = 1,197.2 GWh

4,554.0 (GWh)
I&C consumption

I&C <20 MWh = 319.4 GWh
I&C 20 - 49 MWh = 384.5 GWh
I&C 50 - 499 MWh = 1,207.1 GWh
I&C 500 - 1,999 MWh = 754.4 GWh
I&C 2,000 - 19,999 MWh = 1,238.8 GWh
I&C >20,000 MWh = 649.7 GWh

Total Electricity Complaints

30,957

Domestic Electricity Pricing

27.8p/kWh
January - June 2023

32.9p/kWh
July - December 2023

Total Electricity Switches

128,166

Total NI electricity market shares by connections

4.1 The chart[5] to the right shows the percentage market share by connections[6] for each electricity supplier at the **end of December 2023**.

4.2 When looking at the electricity retail market as a whole by connections (domestic and I&C customers), Power NI, the incumbent supplier, has the leading position with 59.3% share of the market.

Figure 1: Electricity market share by connections – total NI market

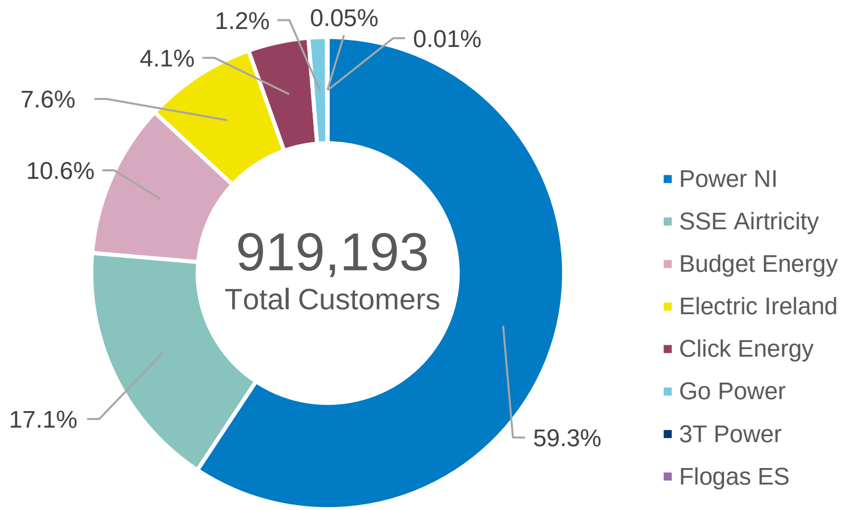

Table 1: Total electricity market share by connections

Market Segment	Power NI	SSE Airtricity	Budget Energy	Electric Ireland	Click Energy	Go Power	3T Power	Flogas ES	Total Customers
Domestic credit	308,377	95,913	11,889	31,494	11,006	928	0	0	459,607
Domestic prepayment	199,822	45,592	84,592	28,245	25,524	0	0	0	383,775
I&C < 20 MWh	28,928	10,496	455	5,924	856	6,733	203	19	53,614
I&C 20 – 49 MWh	4,551	2,963	131	2,024	289	1,957	91	3	12,009
I&C 50 – 499 MWh	3,055	1,748	53	2,168	306	1,645	155	19	9,149
I&C 500 – 1,999 MWh	253	116	0	252	15	121	10	17	784
I&C 2,000 – 19,999 MWh	67	22	0	107	6	27	1	8	238
I&C ≥ 20,000 MWh	0	5	0	10	0	2	0	0	17
Total	**545,053**	**156,855**	**97,120**	**70,224**	**38,002**	**11,413**	**460**	**66**	**919,193**

Source: Northern Ireland Electricity Network (NIEN)

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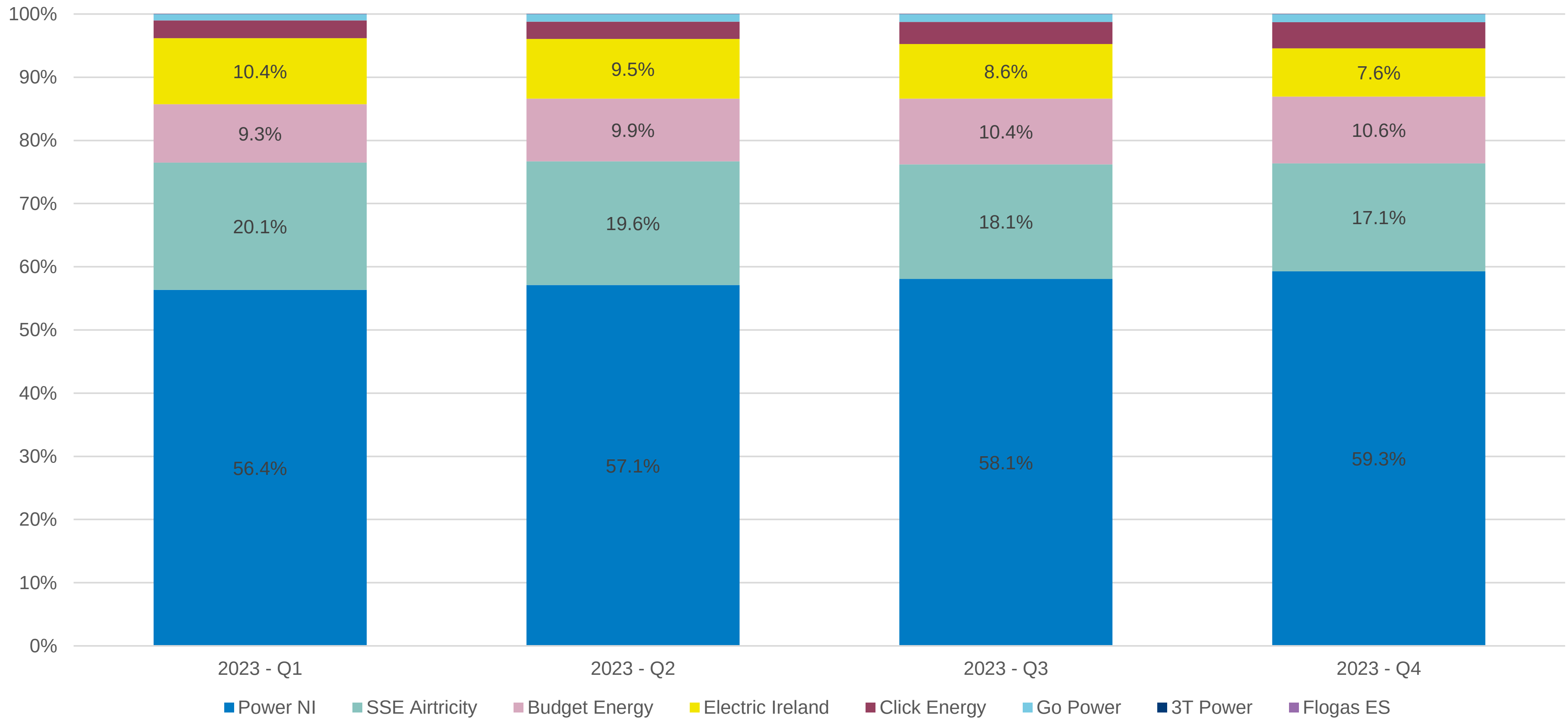
[5] Please note the percentages in the chart may not tally to 100% as the data labels for some suppliers are not labelled due to the size of their market share.
[6] Note that long-term vacant sites are not included in connection numbers, and that combined premises are included in the <20MWh category.

4.3 The bar chart below shows the trends in the market shares (by customer numbers) for each active domestic and I&C supplier in NI for the four quarters of 2023.

Figure 2: Electricity market share by connections during 2023 – total NI market (quarterly)



Source: NIEN

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Total NI electricity market shares by consumption

4.4 The chart to the right shows the percentage market share by consumption for each electricity supplier for the period **January to December 2023.**

4.5 Electricity consumption in the NI retail market for 2023 was 7,297 GWh. Per customer type, domestic consumers consumed 2,743 GWh in 2023 and non-domestic consumers 4,554 GWh.

Figure 3: Electricity market share by consumption – total NI market

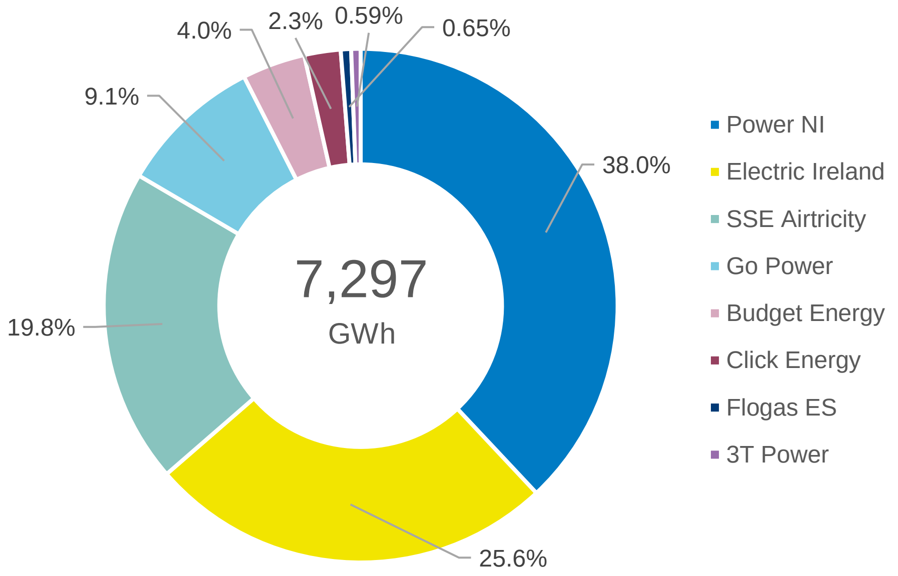

Table 2: Total electricity market share by consumption (GWh)

Market Segment	Power NI	Electric Ireland	SSE Airtricity	Go Power	Budget Energy	Click Energy	Flogas ES	3T Power	Total Consumption
Domestic credit	972	129	375	6	37	27	0	0	1,546
Domestic prepayment	605	119	163	0	241	69	0	0	1,197
I&C < 20 MWh	158	43	71	39	3	5	0	1	319
I&C 20 – 49 MWh	147	76	96	53	5	6	0	1	384
I&C 50 – 499 MWh	376	362	239	180	4	22	4	20	1,207
I&C 500 – 1,999 MWh	226	236	143	111	0	11	17	10	754
I&C 2,000 – 19,999 MWh	289	593	177	117	0	27	26	11	1,239
I&C ≥ 20,000 MWh	2	310	184	153	0	0	0	0	650
Total	**2,774**	**1,868**	**1,447**	**661**	**290**	**167**	**48**	**43**	**7,297**

Source: NIEN

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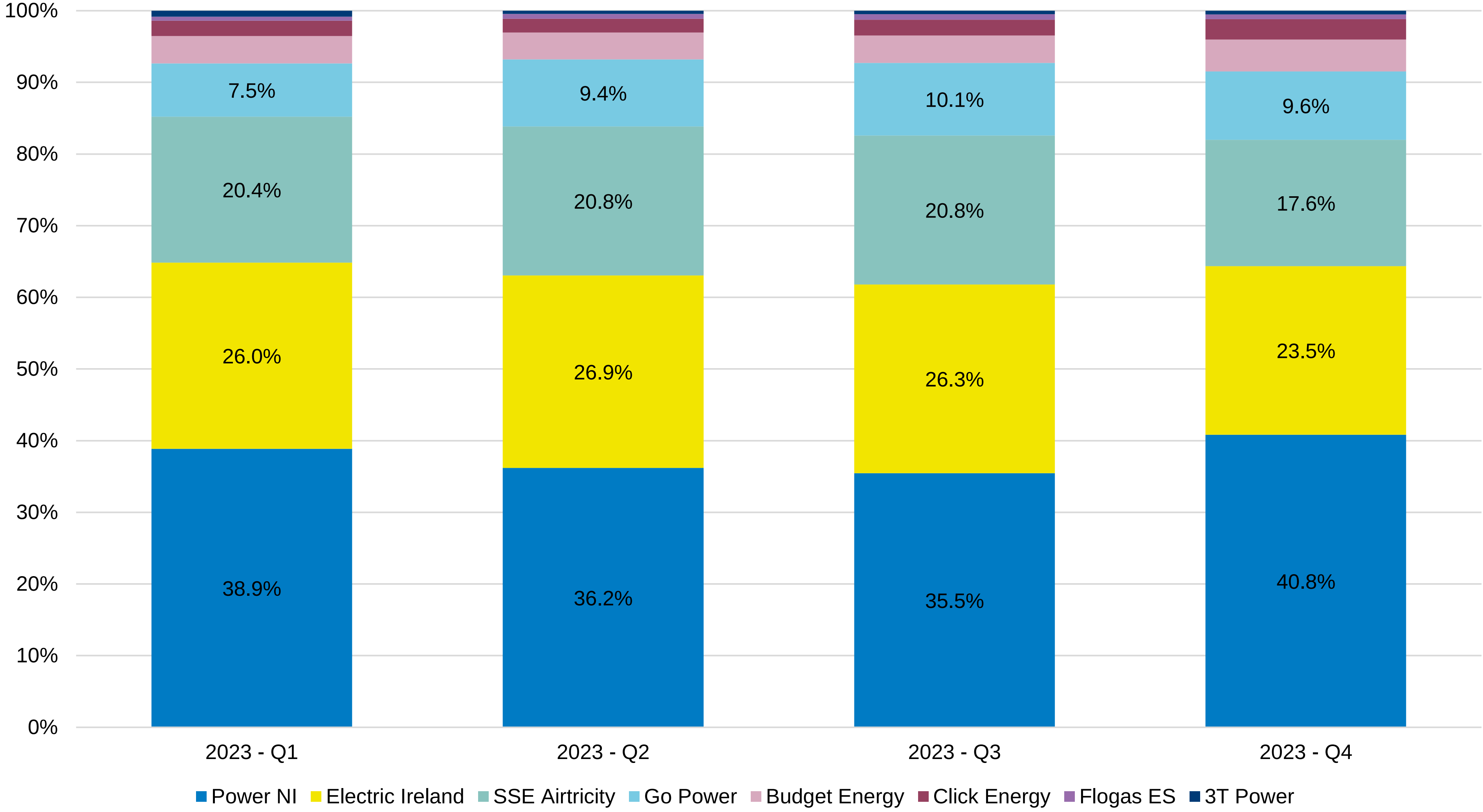
The bar chart below shows the trends in the market shares (by consumption) for each active domestic and I&C supplier in NI for the four quarters of 2023.

Figure 4: Electricity market share by consumption during 2023 – total NI market (quarterly)



Source: NIEN

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Domestic electricity market analysis by connections

4.6 This section of the report provides a more detailed analysis of the electricity domestic market, by connections.

4.7 At the end of 2023 the non-incumbents represented 39.7% of total domestic connections in NI.

Figure 5: Electricity domestic market share by connection

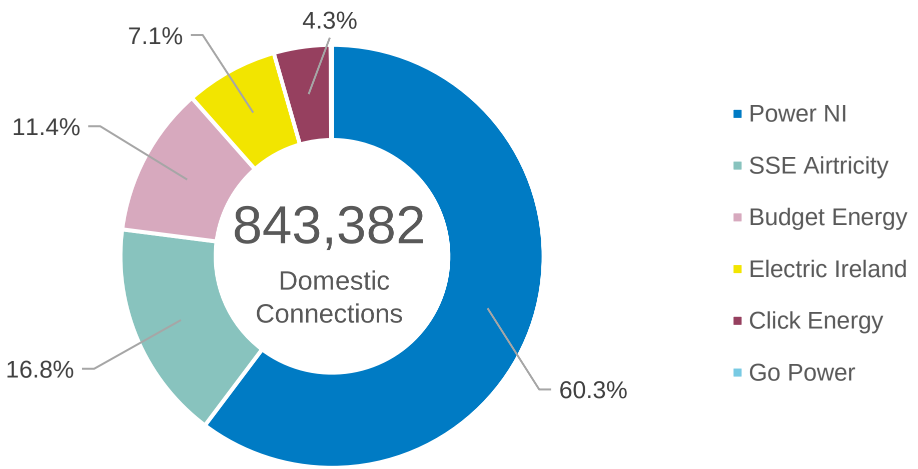

Figure 6: Electricity domestic market share by connections

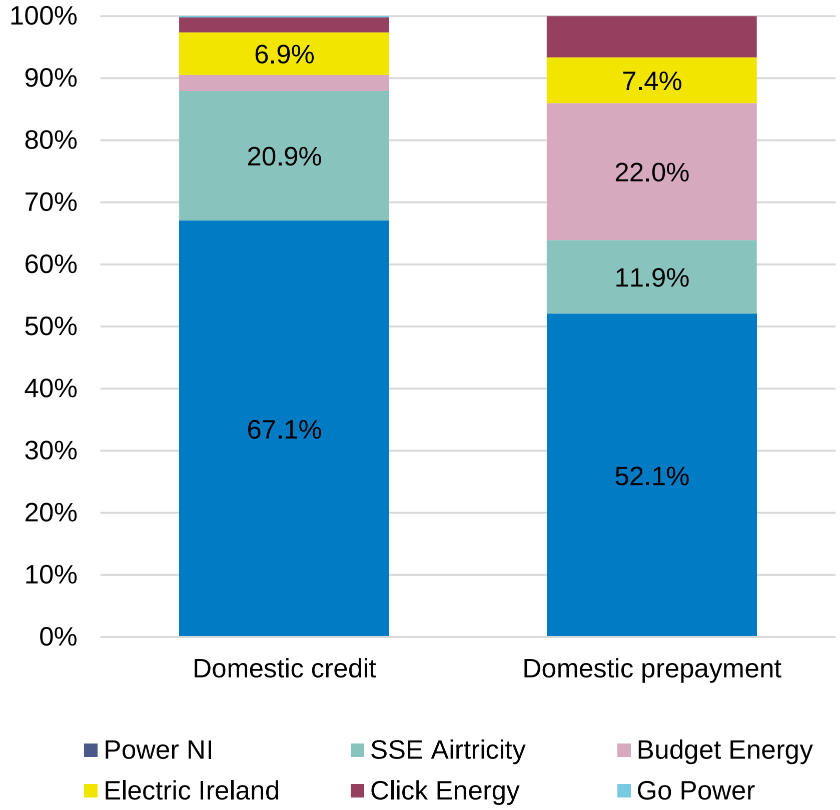

Table 3: Electricity domestic connections by market segment

Market Segment	Power NI		SSE Airtricity		Budget Energy		Electric Ireland		Click Energy		Go Power		Total Customers	
	Number	%	Number	%	Number	%	Number	%	Number	%	Number	%	Number	%
Domestic prepayment	199,822	39%	45,592	32%	84,592	88%	28,245	47%	25,524	70%	0	0%	383,775	46%
Domestic credit	308,377	61%	95,913	68%	11,889	12%	31,494	53%	11,006	30%	928	100%	459,607	54%
Total	**508,199**		**141,505**		**96,481**		**59,739**		**36,530**		**928**		**843,382**	

Source: NIEN

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I&C electricity market analysis by consumption

4.8 This section of the report provides a more detailed analysis of the electricity I&C market, by consumption. I&C consumption for 2023 was 4,554 GWh.

Figure 7: Electricity I&C market share by consumption

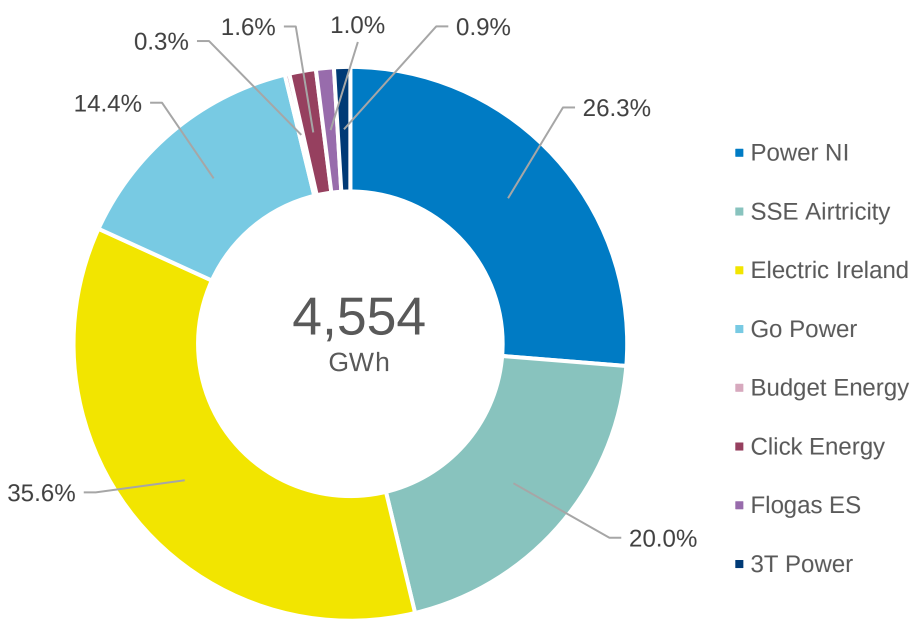

Figure 8: Electricity I&C market share by consumption and market

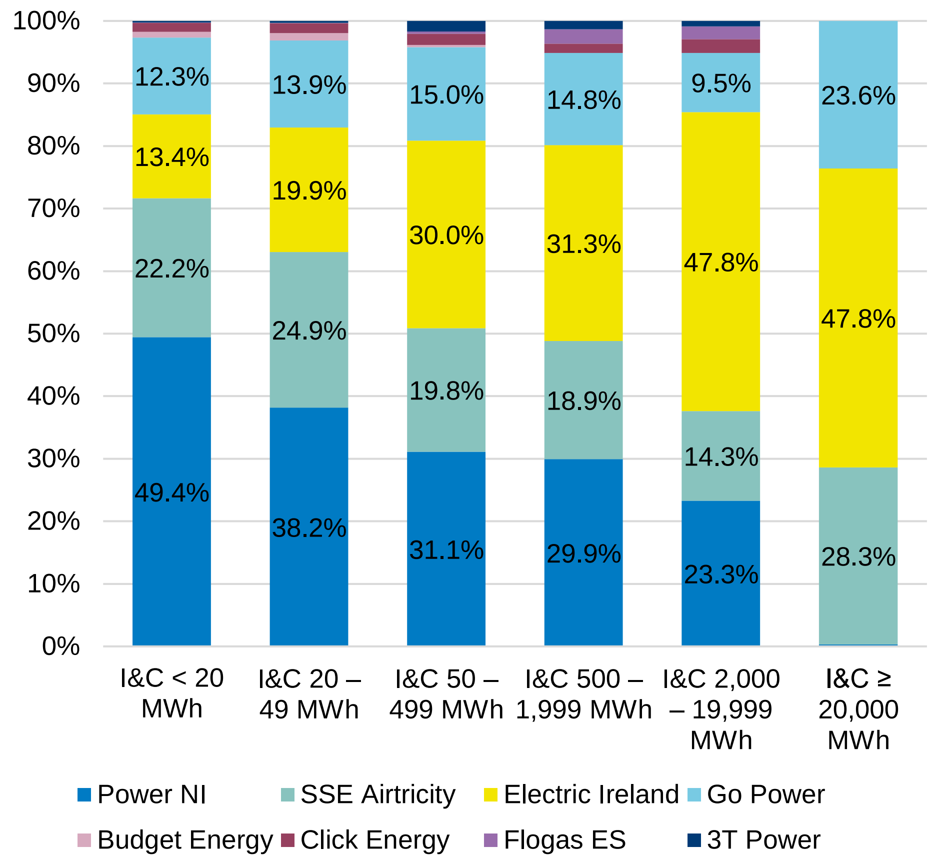

Table 4: Electricity I&C consumption by market segment (GWh)

Market Segment	Electric Ireland	Power NI	SSE Airtricity	Go Power	Click Energy	Flogas ES	3T Power	Budget Energy	Total Consumption
I&C < 20 MWh	42.9	157.9	70.9	39.2	4.5	0.1	0.9	3.0	319.4
I&C 20 – 49 MWh	76.5	146.8	95.7	53.5	6.1	0.1	1.2	4.5	384.5
I&C 50 – 499 MWh	361.6	375.7	238.7	180.5	21.8	4.3	20.2	4.4	1,207.1
I&C 500 – 1,999 MWh	236.1	225.8	142.5	111.3	11.3	17.2	10.2	0.0	754.4
I&C 2,000 – 19,999 MWh	592.5	288.5	177.3	117.1	26.9	25.8	10.6	0.0	1,238.8
I&C ≥ 20,000 MWh	310.3	2.0	184.1	153.3	0.0	0.0	0.0	0.0	649.7
Total	**1,619.9**	**1,196.7**	**909.3**	**654.9**	**70.7**	**47.5**	**43.1**	**11.9**	**4,554.0**

Source: NIEN

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Electricity – new domestic and I&C connections

4.9 This section of the report provides an analysis of the electricity **new domestic and I&C connections**, for the **four quarters of 2023.**

Figure 9: Electricity - New Domestic and I&C Connections

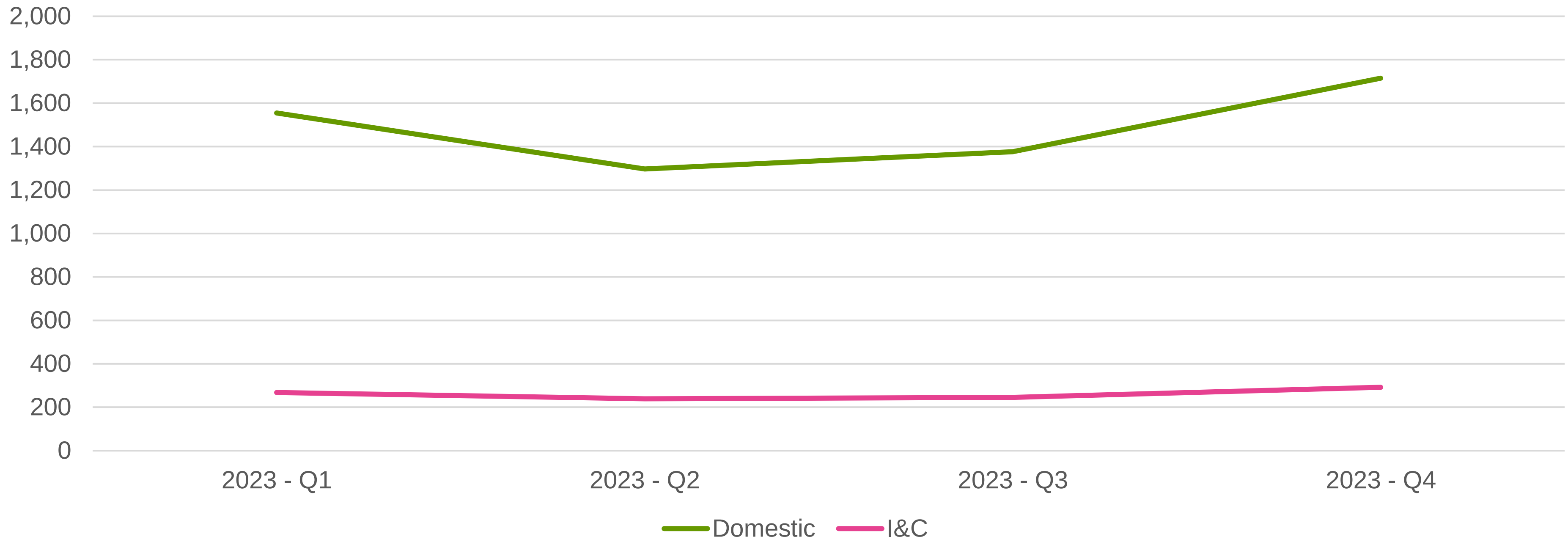

Table 5: Electricity – number of new domestic and I&C connections

Customer Type	2023 - Q1	2023 - Q2	2023 - Q3	2023 - Q4	Total
Domestic	1,555	1,297	1,376	1,715	5,943
I&C	268	239	245	292	1,044
Total	**1,823**	**1,536**	**1,621**	**2,007**	**6,987**

Source: NIEN

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Electricity market activity - switching

4.10 The table below shows the total market activity through changes of supplier (CoSs) on a quarterly basis for the domestic and I&C sectors including the quarterly switching rate[7]. The total number of switches in 2023 was 128,166, which is 8% higher than 2022 (c118,774).

Table 6: Switching rate – total NI market

Quarter	2023 - Q1	2023 - Q2	2023 - Q3	2023 - Q4
Number of Switches	24,232	29,870	36,094	37,970
Switching rate (%)	2.6%	3.3%	3.9%	4.1%

Source: NIEN

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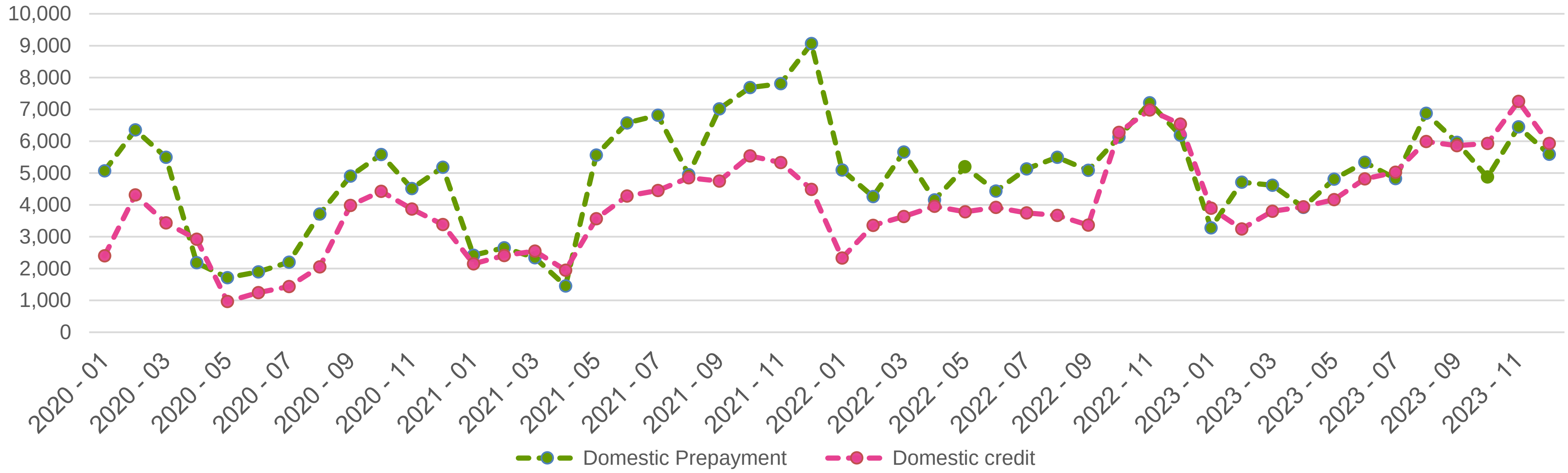
[7] The switching rate percentages are calculated using the number of quarterly switches divided by the number of customers at the end of the quarter in the relevant market.

4.11 The graph below shows the number of domestic switches, split by domestic credit and domestic prepayment on a monthly basis, followed by a table with the total domestic switches and domestic switching rate for each of the four quarters for 2023.

Figure 10 - Electricity - monthly domestic switching



Source: NIEN

Table 7: Switching rate – domestic market

Quarter	2023 - Q1	2023 - Q2	2023 - Q3	2023 - Q4
Number of Switches	23,542	26,987	34,535	36,029
Switching rate (%)	2.8%	3.2%	4.1%	4.3%

Source: NIEN

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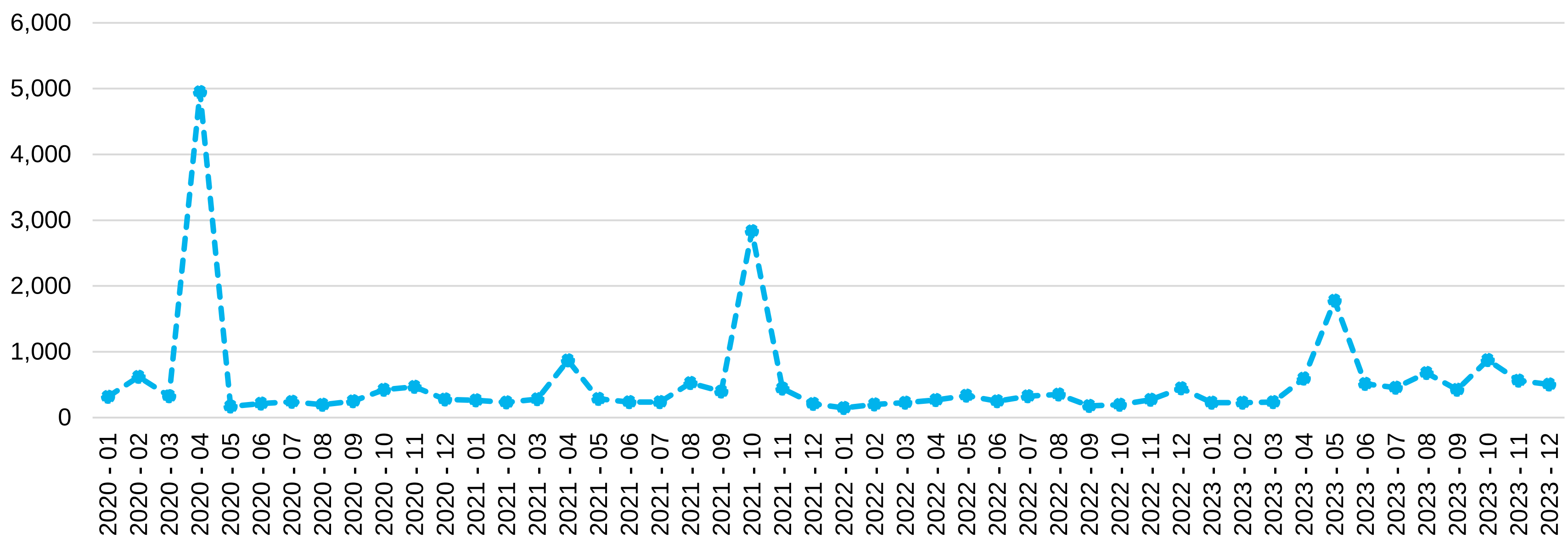
4.12 The graph below shows the number of I&C switches on a monthly basis and the table details the total switches and switching rate for each of the four quarters for 2023.

Figure 11 - Electricity - monthly I&C switching



Source: NIEN

Table 8: Switching rate – I&C market

Quarter	2023 - Q1	2023 - Q2	2023 - Q3	2023 - Q4
Number of Switches	690	2,883	1,559	1,941
Switching rate (%)	0.9%	3.8%	2.1%	2.6%

Source: NIEN

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5. Electricity pricing – 2023

5.1 **Domestic price comparison with EU[8]:** In the domestic graphs shown, we use unit prices which include Climate Change Levy (CCL) and include VAT as this reflects the final prices paid by domestic customers. The medium sized domestic customers (annual consumption of between 2,500 and 4,999 kWh) have been selected for the purpose of analysis, as this consumption category reflects the majority of domestic customers in NI.

Figure 12: Medium domestic connections unit prices inc all taxes (p/kWh) January – June 2023

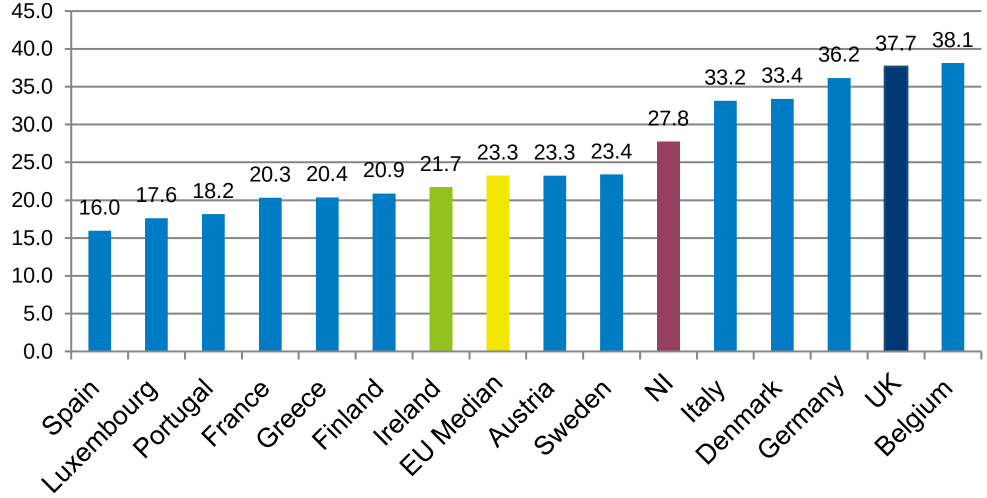
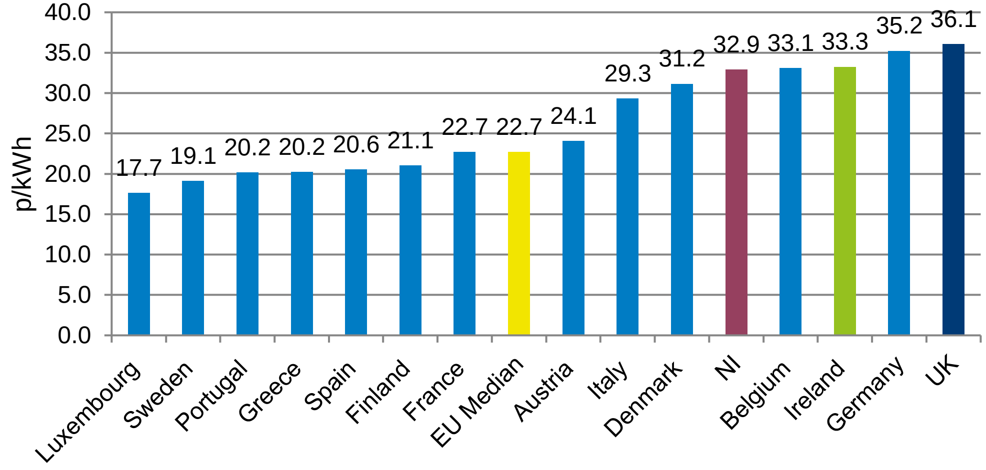


Figure 13: Medium domestic connections unit prices inc all taxes (p/kWh) July – December 2023



Source: NI electricity suppliers, DESNZ, Eurostat and UR internal calculations

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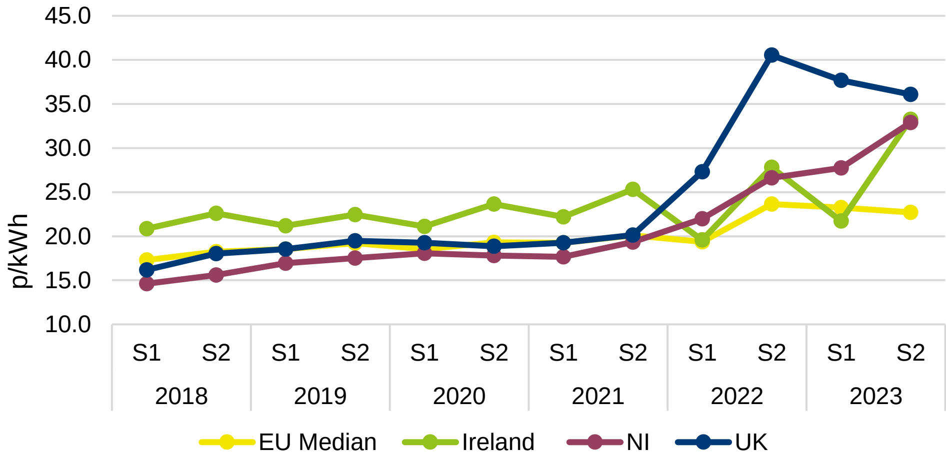
[8] The NI price includes the discount provided to consumers via the Electricity Price Guarantee scheme which was effective in Northern Ireland from November 2022 to 30 June 2023. Various governments across the EU have taken different actions to mitigate against rising energy costs. This Eurostat article provides some information on the measures implemented for domestic electricity consumers – link.

5.2 In semester 1 and 2 2023 the NI price was less than UK.

5.3 The graph opposite shows the medium domestic connections unit price (inc all taxes) over the last five years compared to the EU median, UK and Ireland.

Figure 14: Medium domestic connections – unit price over time



Source: NI electricity suppliers, DESNZ, Eurostat and UR internal calculations

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5.4 **I&C price comparison with EU**: The graphs below show I&C electricity prices in the 15 EU[9] countries (converted to GBP) and in NI, per consumption size bands (following standard EU categorisation). The I&C graphs use unit prices which include Climate Change Levy (CCL) but exclude VAT, as VAT is a refundable expense for many businesses. This reflects the final prices paid by I&C customers. We amalgamate the two largest categories of annual consumption (large and very large connections) to avoid any confidentiality issues in sectors where there are a small number of customers and suppliers involved.

5.5 During semester 1 2023 (January – June), the NI prices in the very small I&C Category were higher than the EU median and UK but lower than Ireland (c71% of I&C connections in NI are in this size category). During the same period, for the large and very large I&C customers (c0.02% of connections), NI prices were lower than the UK and Ireland, but higher than the EU median.

5.6 During semester 2 2023 (July - December), the NI prices in the very small I&C Category were higher than the EU median, the same in Ireland and lower than the UK (c71% of I&C connections in NI are in this size category). During the same period, for the large and very large I&C customers (c0.02% of connections), NI prices were lower than the UK and Ireland, but higher than the EU median.

[9] Some graphs do not include all 15 EU countries due to availability of data from Eurostat.

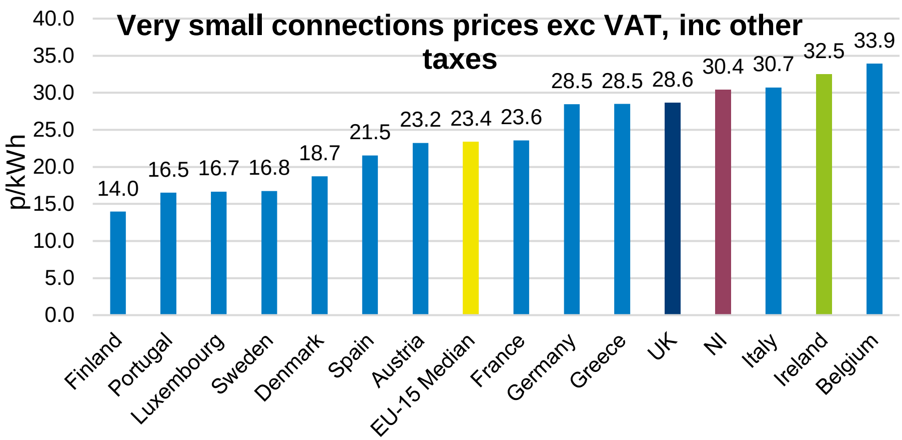
Table 9: I&C connections and consumption end of June 2023 (semester 1)

	Size of Customer	Annual Consumption bands (MWh)	% of I&C connections	% of I&C consumption	I&C connection numbers
Semester 1 (January – June) 2023	Very small	< 20	70.7%	6.3%	53,362
	Small	20 – 499	27.9%	32.9%	21,100
	Small / Medium	500 – 1,999	1.1%	17.0%	797
	Medium	2,000 – 19,999	0.3%	28.8%	241
	Large & Very Large	>20,000	0.0%	15.0%	16

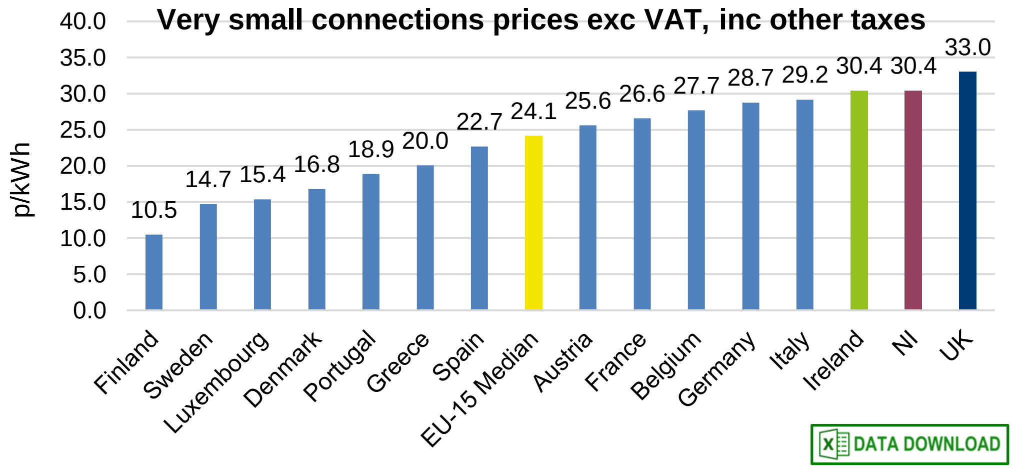
Table 10: I&C connections and consumption end of December 2023 (semester 2)

	Size of Customer	Annual Consumption bands (MWh)	% of I&C connections	% of I&C consumption	I&C connection numbers
Semester 2 (July – December) 2023	Very small	< 20	70.7%	7.5%	53,614
	Small	20 – 499	27.9%	36.6%	21,158
	Small / Medium	500 – 1,999	1.0%	16.6%	784
	Medium	2,000 – 19,999	0.3%	25.5%	238
	Large & Very Large	>20,000	0.0%	13.8%	17

Semester 1 (January – June) 2023



Semester 2 (July – December) 2023



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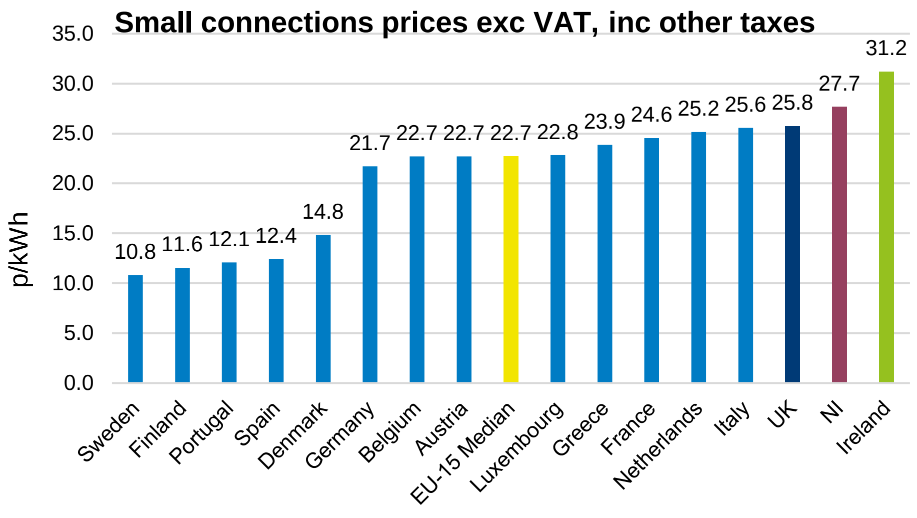

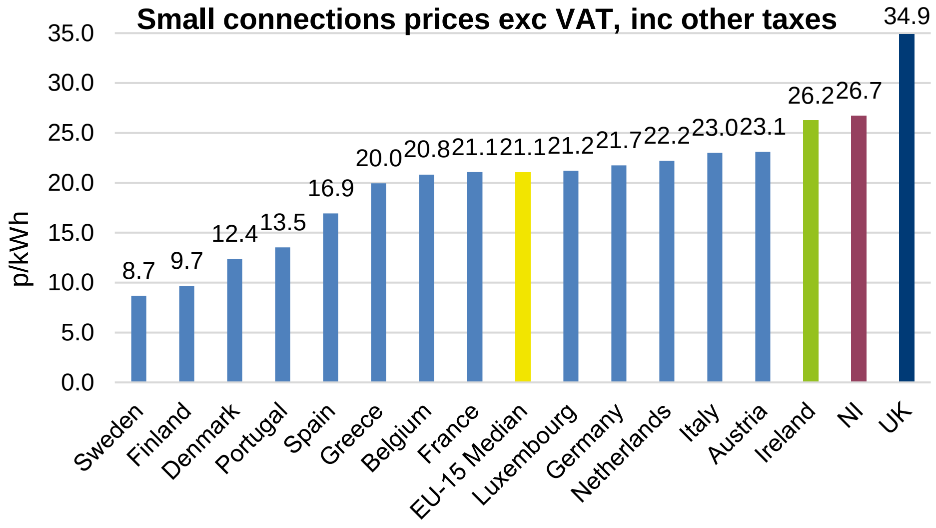

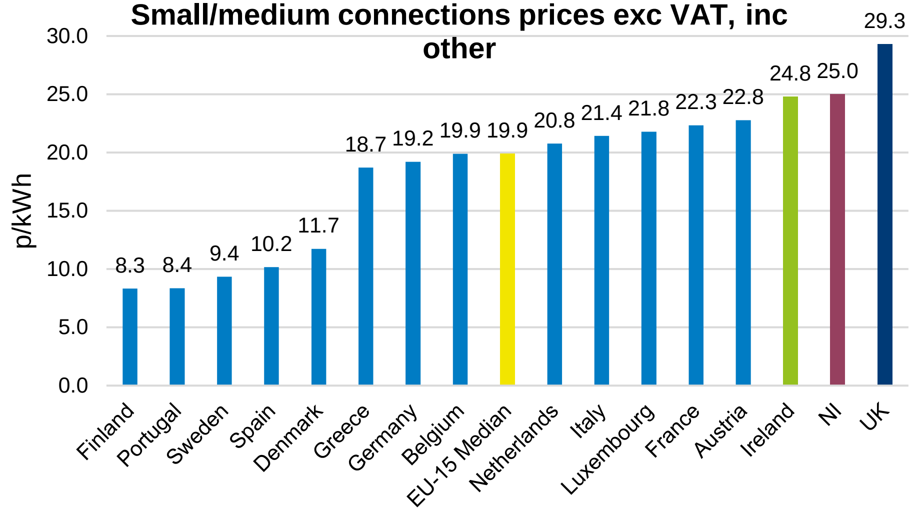

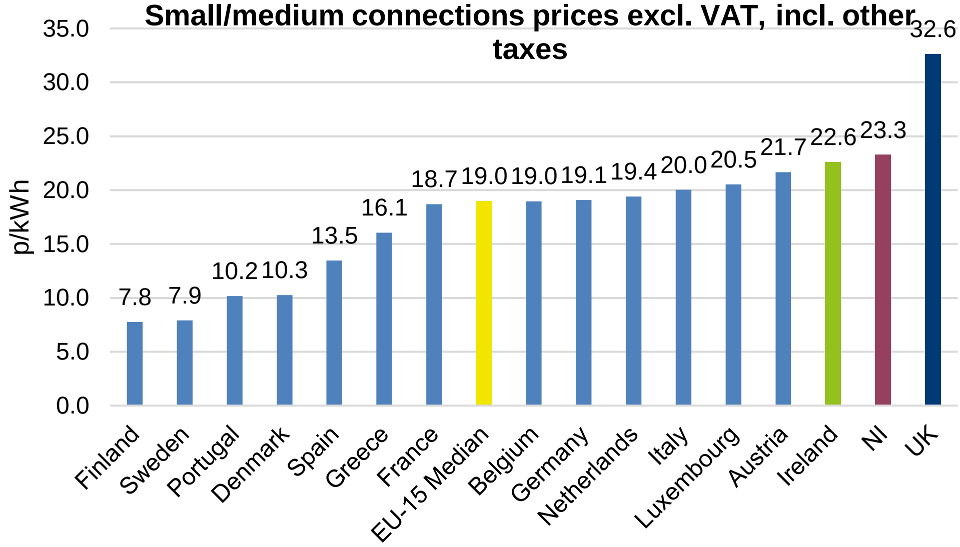

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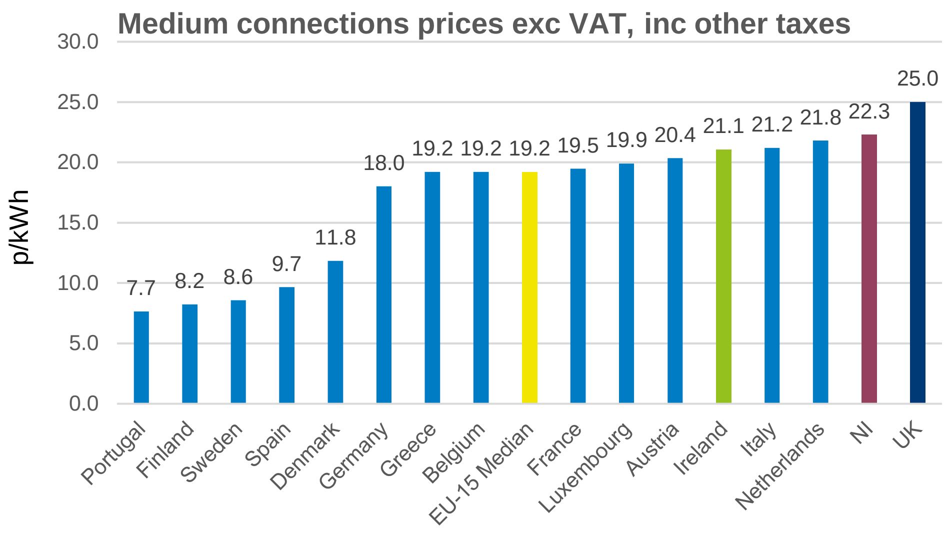

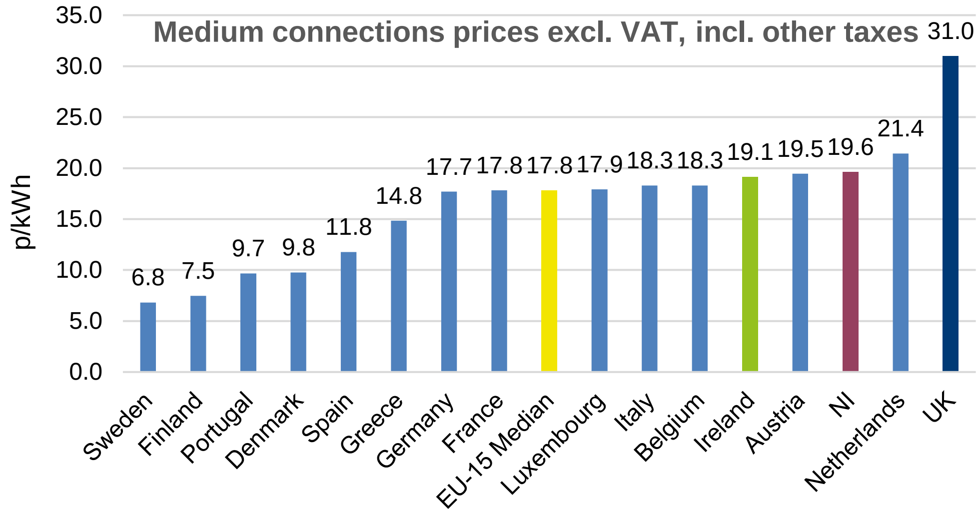

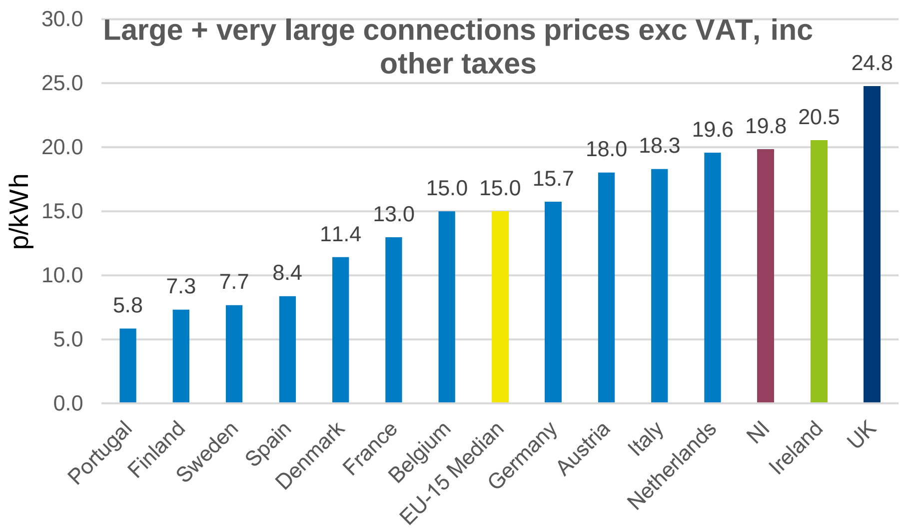

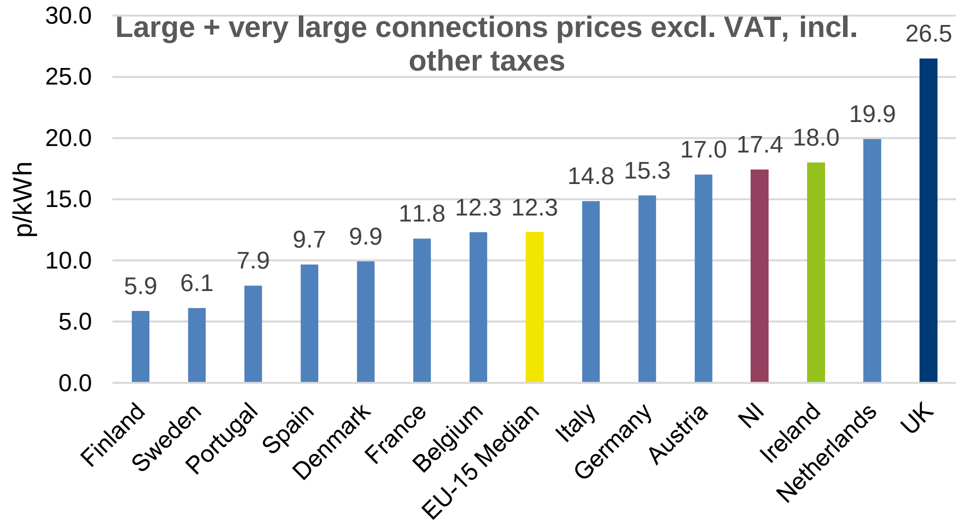

Figures 15 to 24 re I&C Electricity Prices
Source: NI electricity suppliers, DESNZ, Eurostat and UR internal calculations

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5.7 The graphs below show the unit price over time for the two I&C groups (Small and Medium) which have the majority percentage share of I&C sector, by consumption.

Figure 25: Small I&C connections - unit price over time

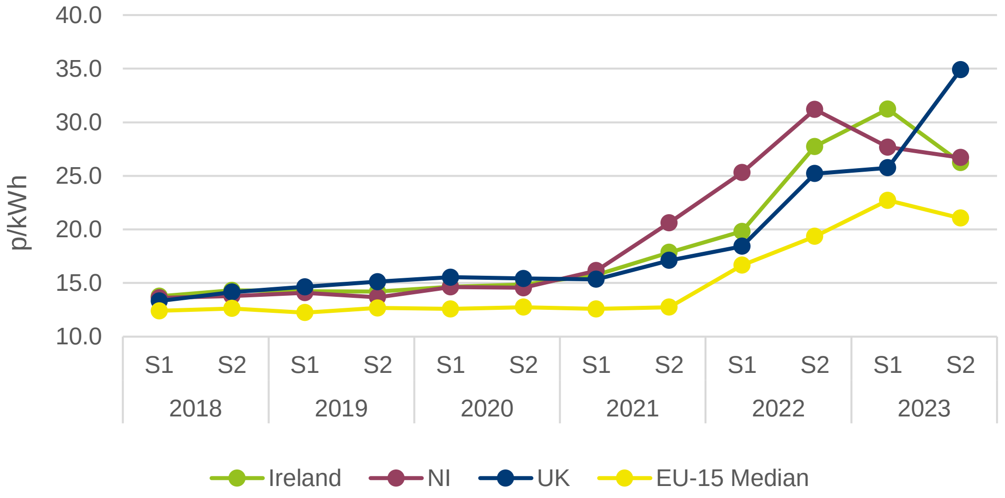
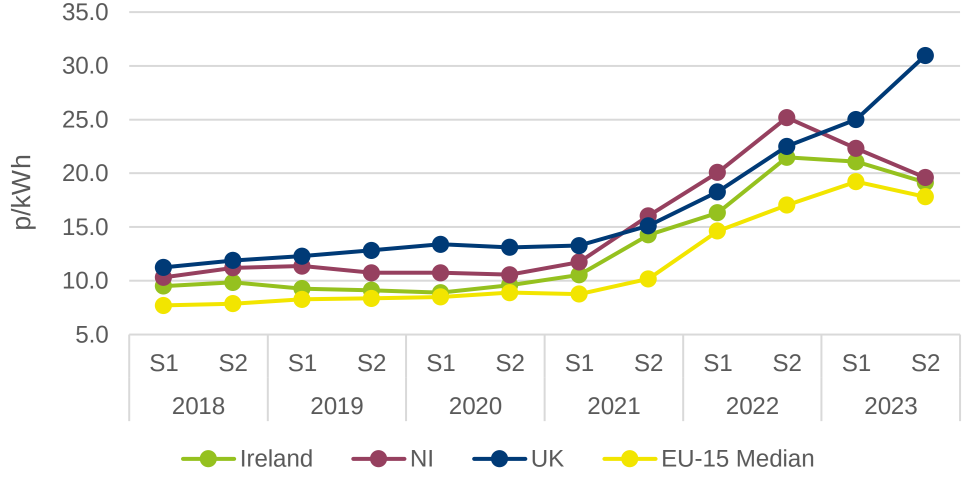


Figure 26: Medium I&C connections - unit price over time



Source: NI electricity suppliers, BEIS, Eurostat and UR internal calculations

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6. Electricity supplier complaints

6.1 This section of the report provides readers with information in relation to electricity supplier complaints collated in 2023. The definition of a complaint is outlined in our Code of Practice minimum standards on Complaints Handling[10]. The complaints data is provided by electricity suppliers as per the REMM framework[11]. The Consumer Council for Northern Ireland (CCNI) report on customer complaints[12].

Total supplier complaints

6.2 The table below shows the total number of complaints received by suppliers during 2023, per complaint type, for domestic and I&C customers. The corresponding graph shows the percentage breakdown of the type of complaints made to suppliers during 2023 for all customers. The total number of electricity complaints has increased from 27,325 in 2022 to 30,957 in 2023.

Table 11: Domestic and I&C complaints by type

Complaint type	No. of domestic complaints	No. of I&C complaints	No. of total complaints
Bills, payments and accounts	7,091	591	7,682
Customer Service	6,939	236	7,175
Prepayment meter issues	5,010	4	5,014
Other	2,673	122	2,795
Selling/marketing - other	2,533	17	2,550
Tariffs	2,386	176	2,562
Switching	1,328	51	1,379
Network Company related	670	63	733
Debt issues, disconnections and reconnections	446	201	647
Selling/marketing - doorstep and face-to-face	412	8	420
Total	**29,488**	**1,469**	**30,957**

Source: Suppliers

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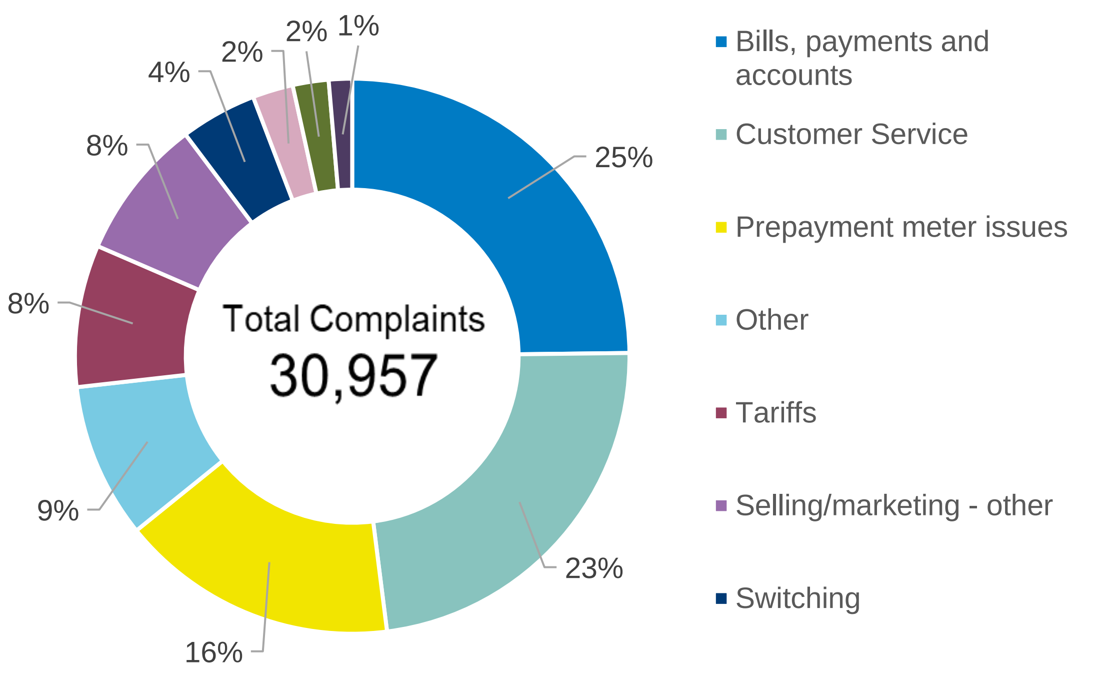
[10] A complaint is: "The expression (through various possible channels: letter, email, phone call or physical claim) of a person's dissatisfaction" as defined in the Code of Practice minimum standards on complaint handling (June 2015).
[11] REMM final decisions paper (June 2015).
[12] CCNI have a statutory duty to deal with customer complaints which they publish each year: CCNI Annual Complaints and Communication Report 2022/23

5.3 The three most common electricity supplier complaints made during 2023 related to: bills, payments and accounts (25%), customer service (23%), and prepayment meter issues (16%), which is a similar profile to the complaints in 2022 (although percentages vary).

Figure 27: Total electricity complaints by type



Source: Suppliers

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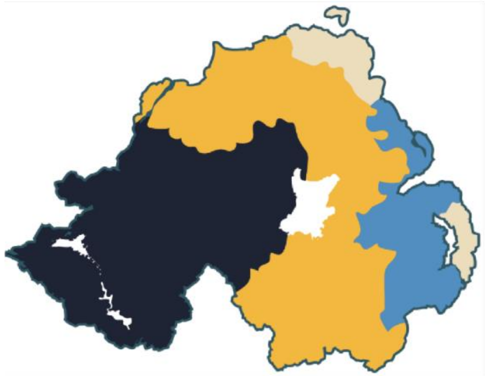
7. Gas[13]

GAS 2023

Total Gas Connections
(End Q4 2023)
324,706

Total Gas Consumption
(Total 2023)
6,826,137 (MWh)

West
Connections = 3,935
Consumption = 775,817 (MWh)



G.Belfast
Connections = 251,673
Consumption = 4,137,116 (MWh)

Ten Towns
Connections = 69,098
Consumption = 1,913,204 (MWh)

Total Gas Complaints
59,755

Domestic Gas Pricing
9.8 p/kWh January - June 2023
11.0 p/kWh July - December 2023

Total Gas Switches
5,113

[13] Section 7 consolidates the gas connection, consumption and switching data from the three gas distribution areas (where applicable).

Total gas NI market share by connections

7.1 This section provides information on the total connection numbers in NI, by supplier, in all three-distribution areas. The market shares in terms of connections[14] are as at the **end of December 2023.**

Figure 28: Gas market share by distribution license area by connection

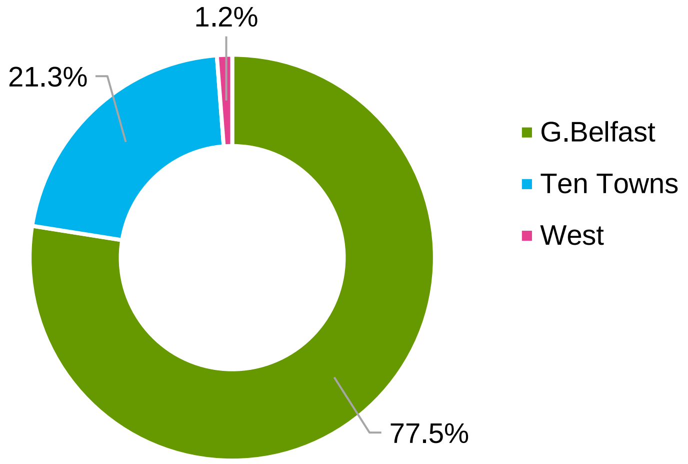


Figure 29: Gas market share by supplier by connections

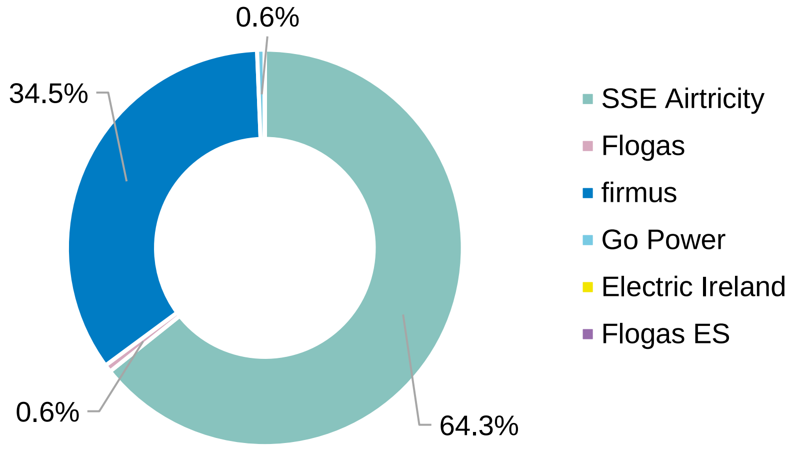


Table 12: Gas market share by connections

Distribution Licensed Area	Market Segment	SSE Airtricity	firmus	Flogas	Go Power	Flogas ES	Electric Ireland	Total Connections
G.Belfast	Domestic Only	198,846	41,086	0	0	0	0	239,932
G.Belfast	I&C Only	5,973	2,674	1,454	1,614	19	7	11,741
Ten Towns	Domestic Only	0	66,034	0	0	0	0	66,034
Ten Towns	I&C Only	73	2,079	509	396	0	7	3,064
West	Domestic Only	3,834	0	0	0	0	0	3,834
West	I&C Only	17	54	19	9	0	2	101
Total		**208,743**	**111,927**	**1,982**	**2,019**	**19**	**16**	**324,706**

Source: PNGL / FeDL / Evolve

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[14] Please note the percentages in the chart may not tally to 100% as the data labels for some suppliers are not reflected due to the size of their market share.

Total gas NI market share by consumption

7.2 The pie chart below shows the total gas consumption in NI for the period **January to December 2023**, with a breakdown by distribution area. Total consumption for the period was **6,826,138 MWh**.

Figure 30: Gas market share by distribution license area by consumption

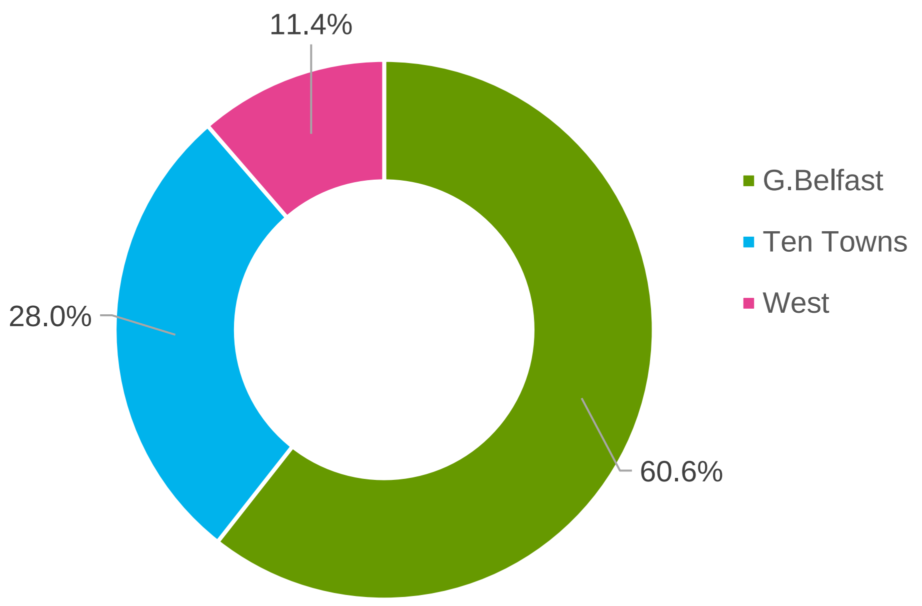

Figure 31: Gas market share by supplier and by consumption

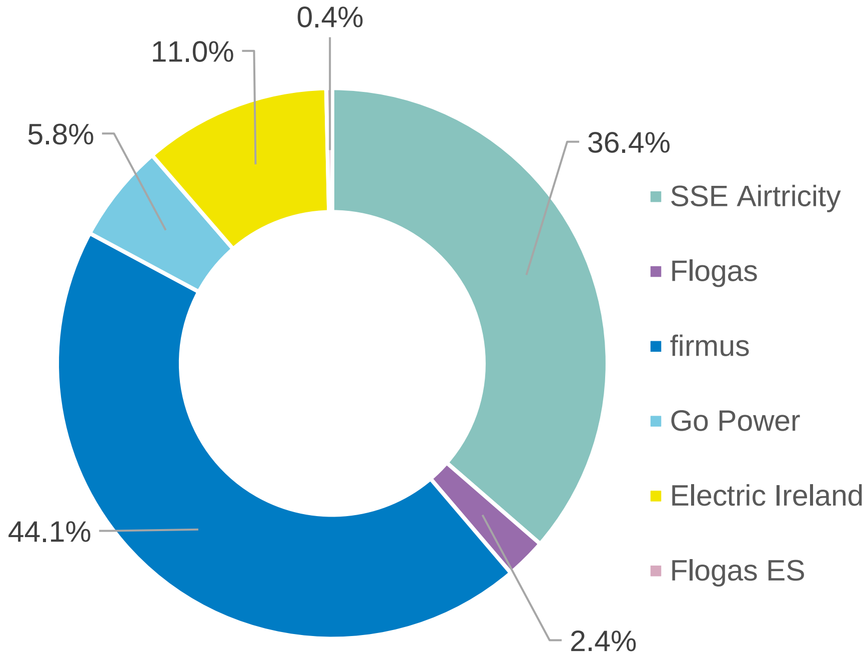

Table 13: Gas market share by consumption (MWhs)

Distribution Licensed Area	SSE Airtricity	firmus	Electric Ireland	Go Power	Flogas	Flogas ES	Total Consumption
G.Belfast	2,266,999	1,261,856	171,927	302,296	110,073	23,965	4,137,116
Ten Towns	126,378	1,529,565	121,892	89,516	45,854	0	1,913,204
West	89,728	217,299	457,224	4,409	7,158	0	775,817
Total	**2,483,106**	**3,008,720**	**751,043**	**396,220**	**163,085**	**23,965**	**6,826,138**

Source: PNGL / FeDL / Evolve

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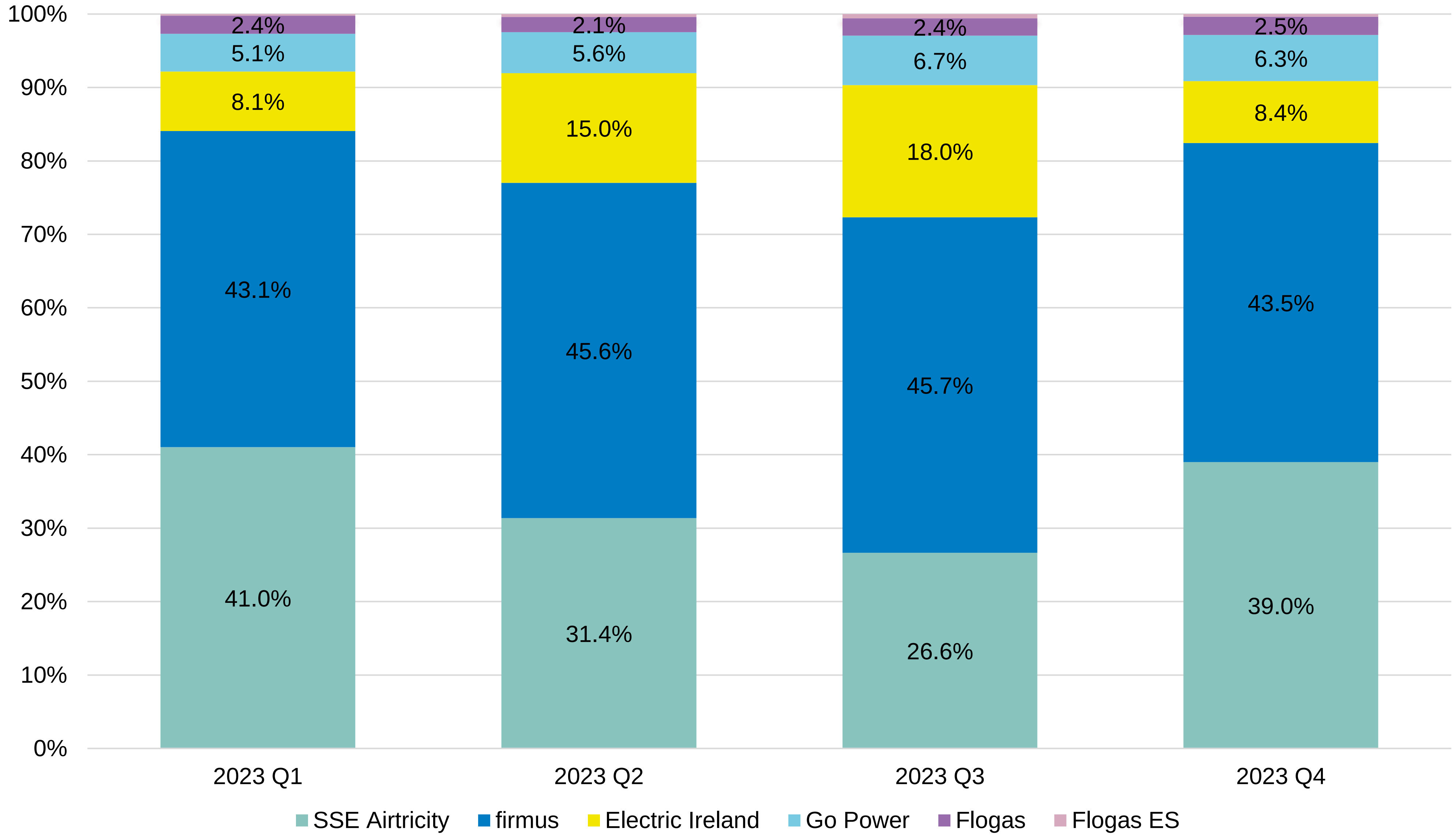
7.3 The bar chart below shows the trends in the market shares (by consumption) for each active domestic and I&C supplier in NI for the four quarters of 2023.

Figure 32: Gas market share by consumption over time – total NI market



Source: PNGL / FeDL / Evolve

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Domestic and small I&C analysis by connections

7.4 This section of the report provides a more detailed analysis of the gas **domestic and small I&C sector**[15], by connections as at the **end of December 2023**.

Figure 33: Domestic and small I&C market share by connections

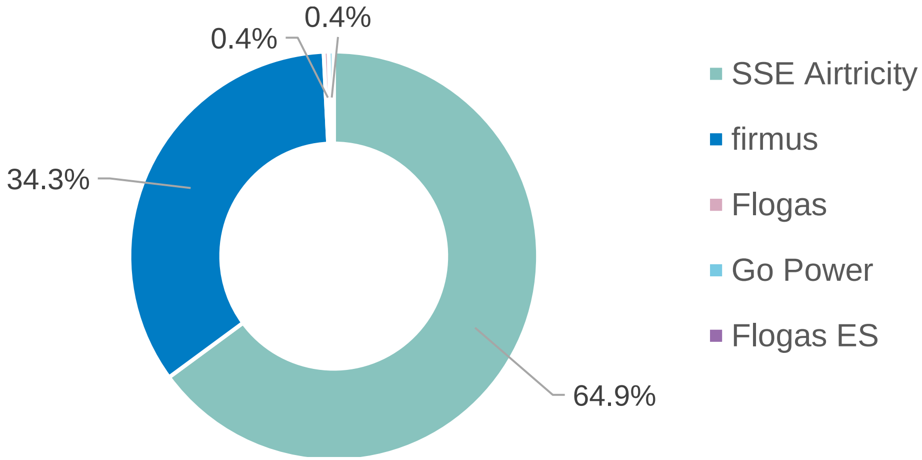

Figure 34: Domestic and small I&C connections by market segment

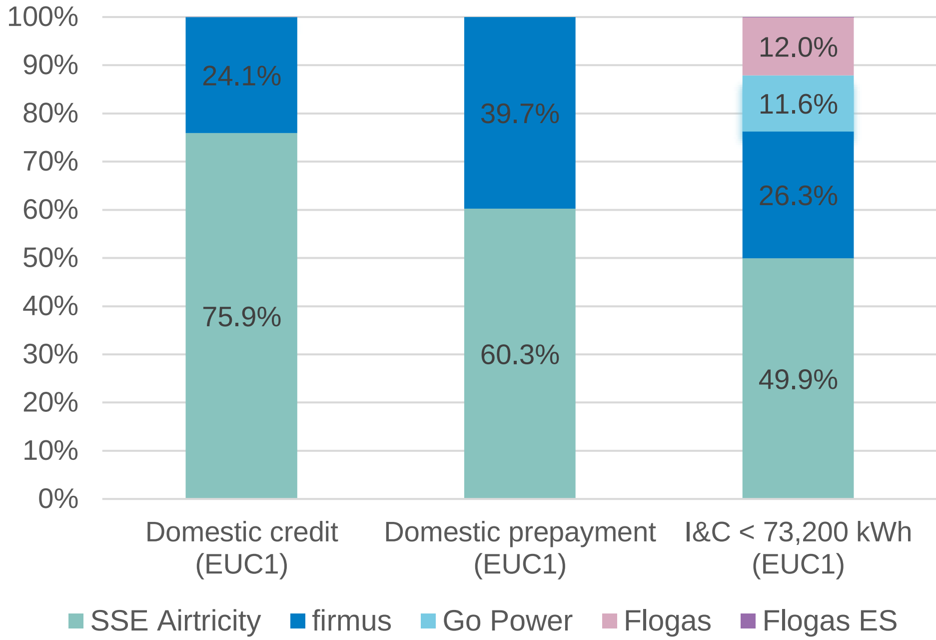

Table 14: Domestic and small I&C analysis by connections

Distribution Licensed Area	Market Segment	SSE Airtricity	firmus	Flogas	Go Power	Flogas ES	Total Connections
G.Belfast	Domestic credit (EUC1)	76,358	10,677	0	0	0	87,035
G.Belfast	Domestic prepayment (EUC1)	122,488	30,409	0	0	0	152,897
G.Belfast	I&C < 73,200 kWh (EUC1)	5,246	1,468	924	1,018	9	8,665
Ten Towns	Domestic credit (EUC1)	0	13,908	0	0	0	13,908
Ten Towns	Domestic prepayment (EUC1)	0	52,126	0	0	0	52,126
Ten Towns	I&C < 73,200 kWh (EUC1)	7	1,289	337	213	0	1,846
West	Domestic credit (EUC1)	1,196	0	0	0	0	1,196
West	Domestic prepayment (EUC1)	2,638	0	0	0	0	2,638
West	I&C < 73,200 kWh (EUC1)	12	20	11	3	0	46
Total		**207,945**	**109,897**	**1,272**	**1,234**	**9**	**320,357**

Source: PNGL / FeDL /Evolve

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[15] The domestic and small I&C sector relates to any customers using less than 73,200 kWh per annum.

Medium and large I&C analysis by consumption

7.5 This section of the report provides a more detailed analysis of the gas **medium and large I&C sector**[16], by consumption for the period **January to December 2023.**

Figure 35: Medium and large I&C market share by consumption

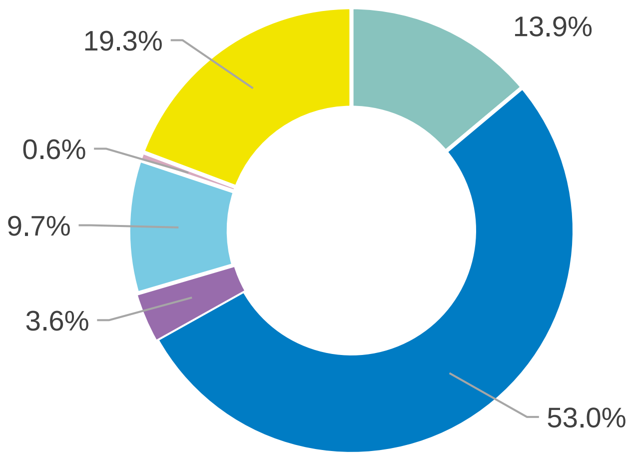

Figure 36: Medium and large I&C market share by market segment and consumption

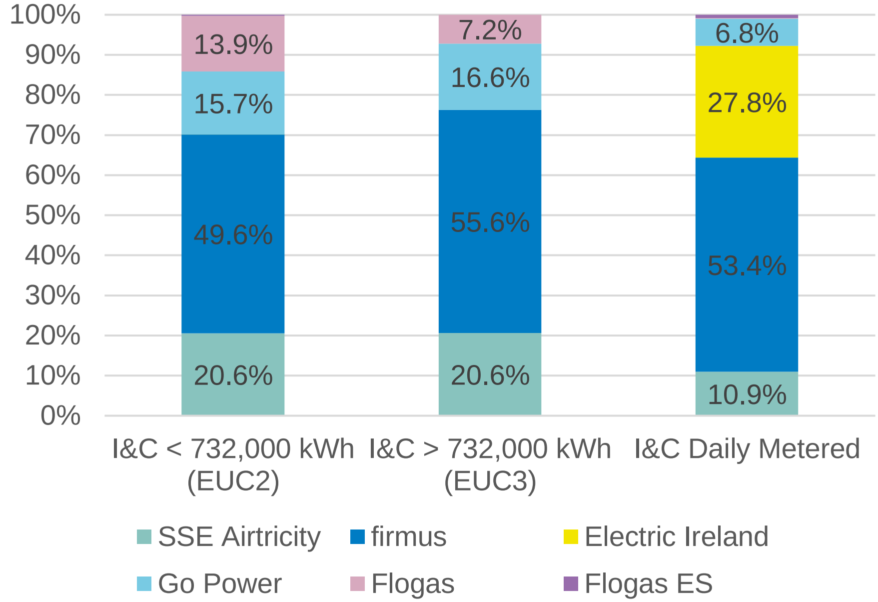

Table 15: Medium and large I&C analysis by consumption (MWhs)

Distribution Licensed Area	Market Segment	SSE Airtricity	firmus	Flogas	Go Power	Flogas ES	Electric Ireland	Total Consumption
G.Belfast	I&C < 732,000 kWh (EUC2)	136,314	208,721	70,693	83,285	1,685	47	500,744
G.Belfast	I&C > 732,000 kWh (EUC3)	67,332	155,272	22,368	57,617	0	0	302,589
G.Belfast	I&C Daily Metered	154,363	506,684	0	145,375	22,124	171,880	1,000,427
Ten Towns	I&C < 732,000 kWh (EUC2)	11,370	144,452	28,567	28,359	0	0	212,748
Ten Towns	I&C > 732,000 kWh (EUC3)	30,390	103,056	10,350	20,996	0	0	164,792
Ten Towns	I&C Daily Metered	84,118	729,867	0	36,490	0	121,892	972,367
West	I&C < 732,000 kWh (EUC2)	401	3,524	1,126	1,227	0	0	6,278
West	I&C > 732,000 kWh (EUC3)	1,191	8,298	1,666	886	0	0	12,041
West	I&C Daily Metered	56,771	204,945	4,254	2,281	0	457,224	725,475
Total		**542,249**	**2,064,820**	**139,025**	**376,515**	**23,809**	**751,043**	**3,897,461**

Source: PNGL / FeDL / Evolve

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[16] The medium and large I&C sector relates to any customers with annual consumption that is greater than or equal to 73,200 kWh per annum. The I&C Daily Metered sector relates to any customer with annual consumption that is greater than 2,196,000 kWh per annum.

Gas – new domestic and I&C connections

7.6 This section of the report provides an analysis of the gas **new domestic connections**, by distribution area and for the **four quarters of 2023.**

Figure 37: New domestic connections

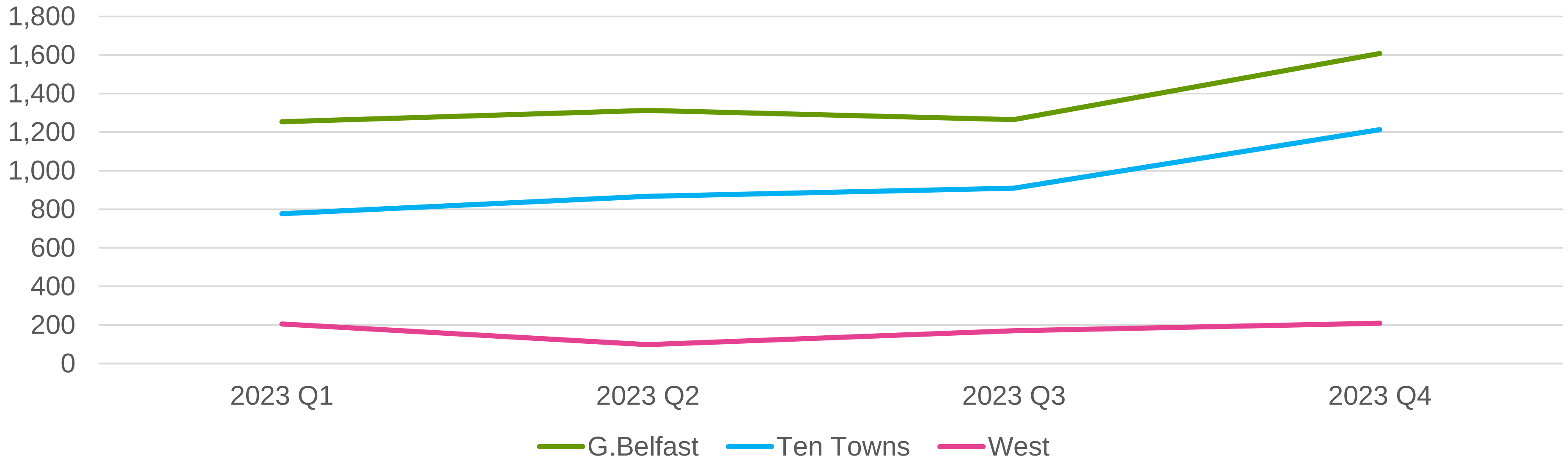

Table 16: Number of new domestic connections

Distribution licensed area	2023 Q1	2023 Q2	2023 Q3	2023 Q4	Total
Greater Belfast	1,254	1,313	1,265	1,608	5,440
Ten Towns	777	867	910	1,213	3,767
West	205	98	170	209	682
Total	**2,236**	**2,278**	**2,345**	**3,030**	**9,889**

Source: PNGL / FeDL / Evolve

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Gas – new I&C connections

7.7 This section of the report provides an analysis of the gas **new I&C connections**, by distribution area and for the **four quarters of 2023.**

Figure 38: New I&C connections

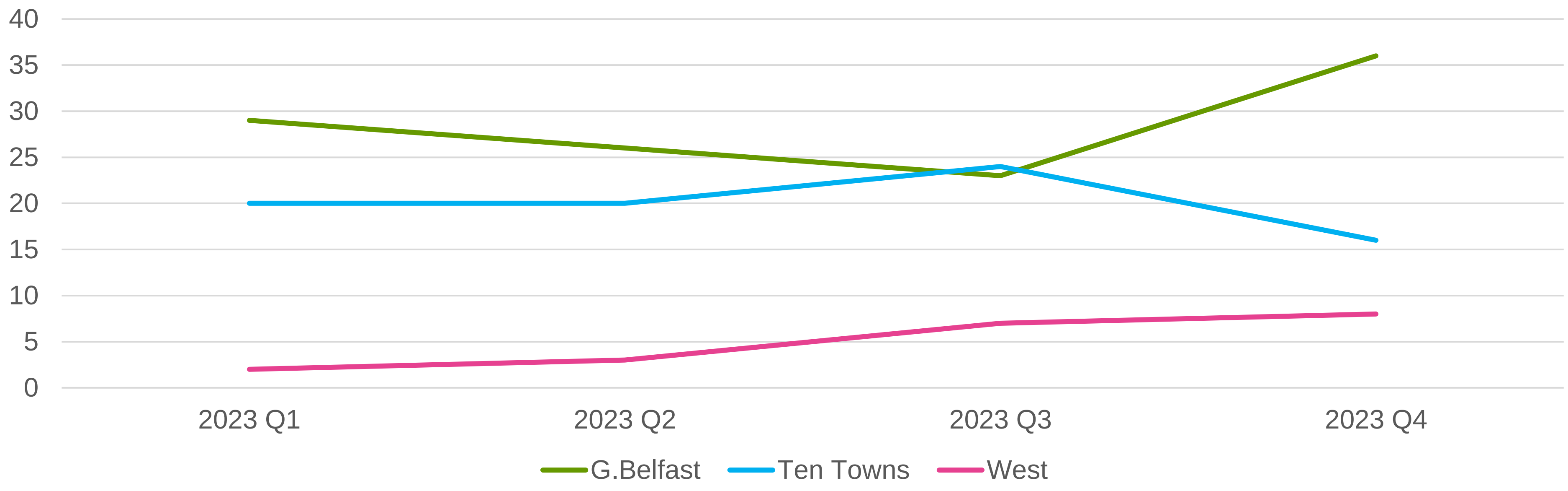

Table 17: Number of New I&C Connections

Distribution Licensed Area	2023 Q1	2023 Q2	2023 Q3	2023 Q4	Total
Greater Belfast	29	26	23	36	114
Ten Towns	20	20	24	16	80
West	2	3	7	8	20
Total	**51**	**49**	**54**	**60**	**214**

Source: PNGL / FeDL / Evolve

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Gas - market activity – switching

7.8 The graph below shows the market activity through changes of supplier (CoSs) on a quarterly basis in the NI gas market (domestic and I&C) across the three distribution areas. The table that follows shows the number of switches and switching rate[17] for each quarter of 2023. There was a total of 5,113 gas switches in 2023, which is a decrease from 6,375 in the previous year.

Figure 39: Gas – quarterly total change of supplier

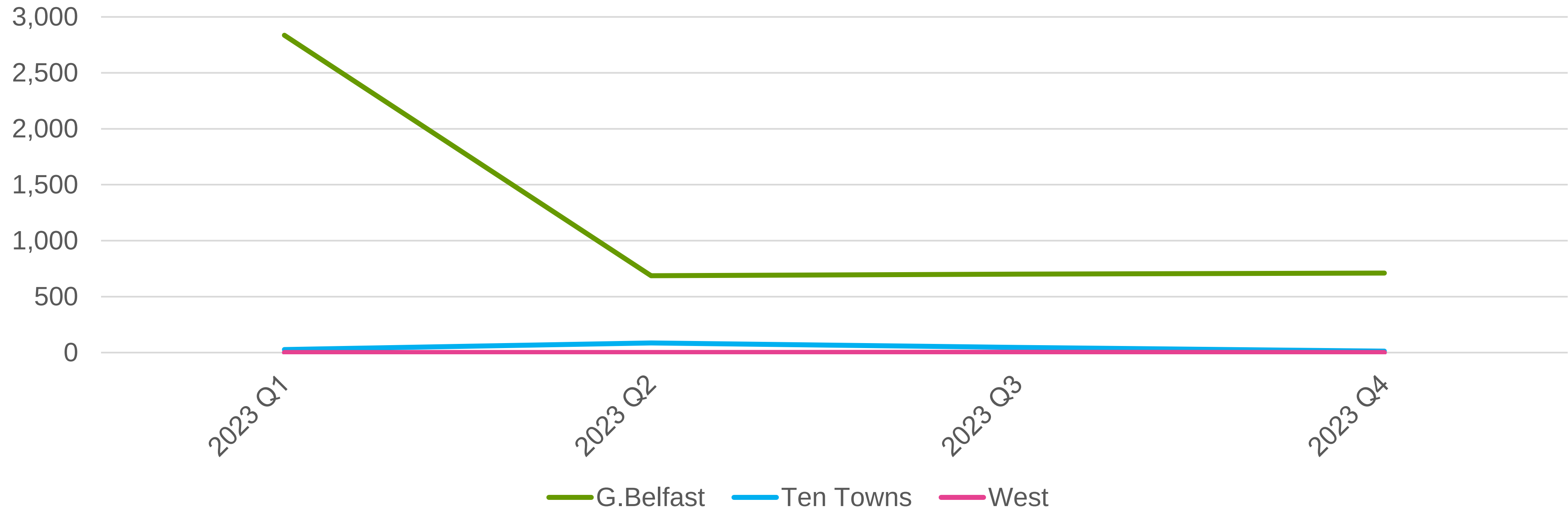

Table 18: Gas -switching rate – total NI market

Quarter	2023 Q1	2023 Q2	2023 Q3	2023 Q4
No. of switches	2,863	775	750	725
Switching rate (%)	0.9%	0.2%	0.2%	0.2%

Source: PNGL / FeDL / Evolve

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[17] The switching rate percentages are calculated using the number of quarterly switches divided by the number of customers at the end of the quarter in the relevant market.

7.9 Greater Belfast is the only distribution area in which there is competition within the domestic credit and prepayment[18] sectors. The figure chart below reflects the monthly change of customer numbers (gains), per market segment within the domestic sector, over time. The table shows the total domestic gains and switching rate for each quarter of 2023. The total number of gas domestic switches in 2023 was 4,277 which was a decrease from 5,846 in the previous year.

Figure 40: Gas – monthly domestic switches (G. Belfast)

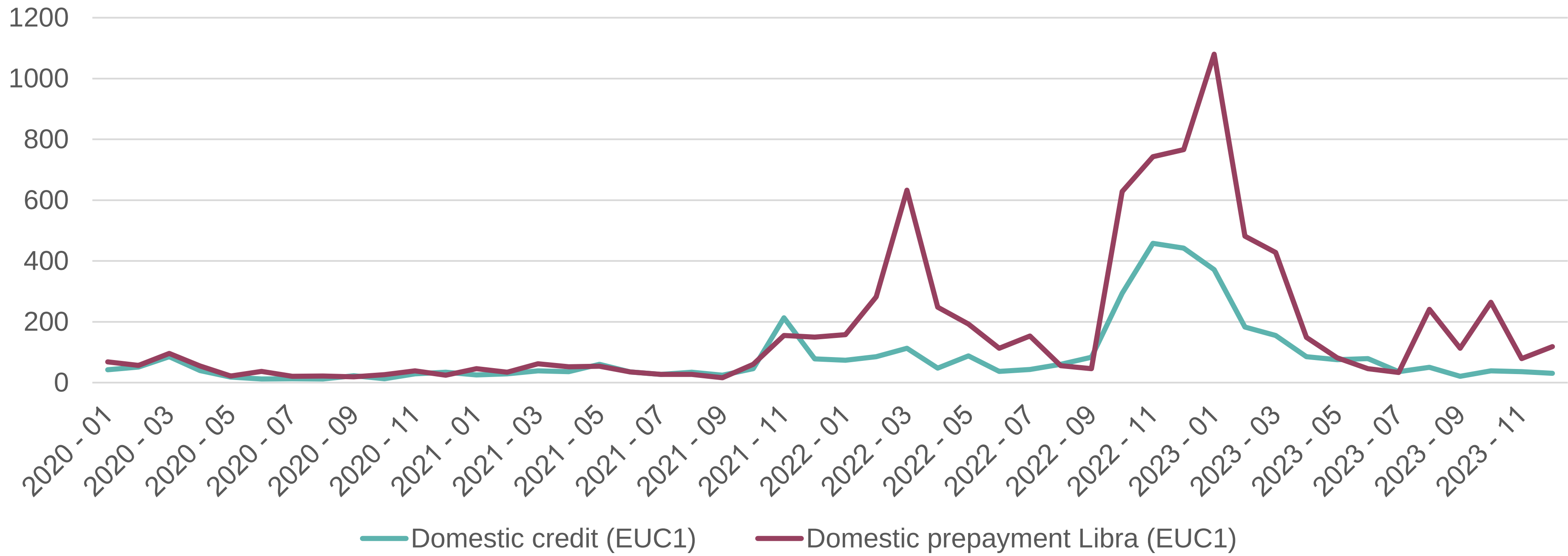

Table 19: Gas - switching rate – domestic market (G Belfast only)

Quarter	2023 Q1	2023 Q2	2023 Q3	2023 Q4
No. of switches	2,700	516	494	567
Switching rate (%)	1.1%	0.2%	0.2%	0.2%

Source: PNGL

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[18] Note that prepayment switches, within the domestic sector, include switches back to the previous supplier in cases where the customer has not taken the required action to complete their switch.

7.10 The figure below reflects the monthly change of customer numbers (gains), within the I&C sector across the three gas distribution areas. The table that follows shows the number of I&C switches and switching rate for each quarter of 2023. The total number of gas I&C switches in 2023 was 836, an increase from 531 in the previous year.

Figure 41: Gas – I&C switches by distribution licensed area

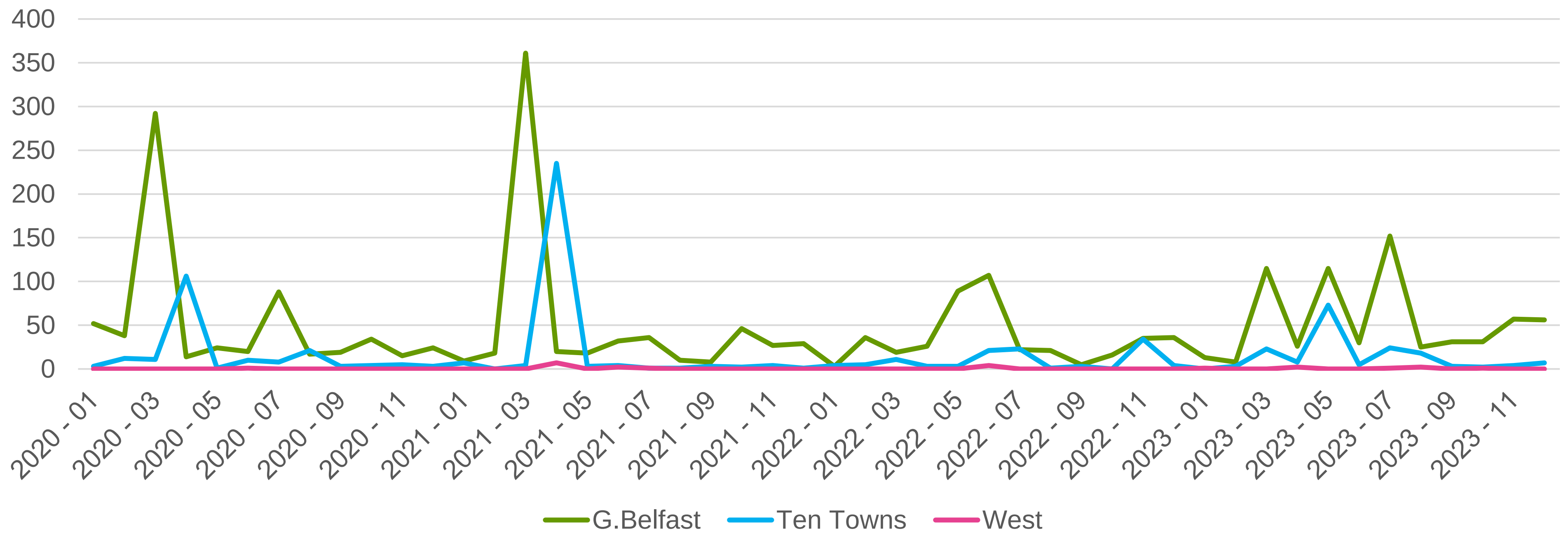

Table 20: Gas switching rate – I&C market

Quarter	2023 Q1	2023 Q2	2023 Q3	2023 Q4
No. of switches	163	259	256	158
Switching rate (%)	1.1%	1.7%	1.7%	1.1%

Source: PNGL / FeDL / Evolve

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8.

8. Gas pricing – 2023

Domestic gas prices

8.1 The pricing data detailed in this Annual REMM report provides a comparison for the period January – June 2023 (semester 1) and July – December 2023 (semester 2).

8.2 In the domestic graphs to the right, we use unit prices which include Climate Change Levy (CCL) and include VAT, as this reflects the final prices paid by domestic customers. The medium sized domestic customers (annual consumption between 5,557 - 55,557 kWh) have been selected for the purpose of analysis, as this consumption category reflects the majority of domestic customers in NI.

8.3 The NI unit price is the average pence per kWh for medium customers for the Greater Belfast, Ten Towns and West network areas. For semester 1 2023, the NI domestic gas prices ranked among the lowest in the EU. In semester 2 the NI domestic gas price was comparable to the EU median. In both semesters the NI domestic gas price was lower than Ireland, but higher than the UK[19].

8.4 The vast majority of NI domestic gas connections are customers of the relevant network incumbent suppliers and are therefore subject to their regulated tariffs.

Figure 42: Medium domestic connections unit prices inc all taxes (p/kWh) January - June 2023

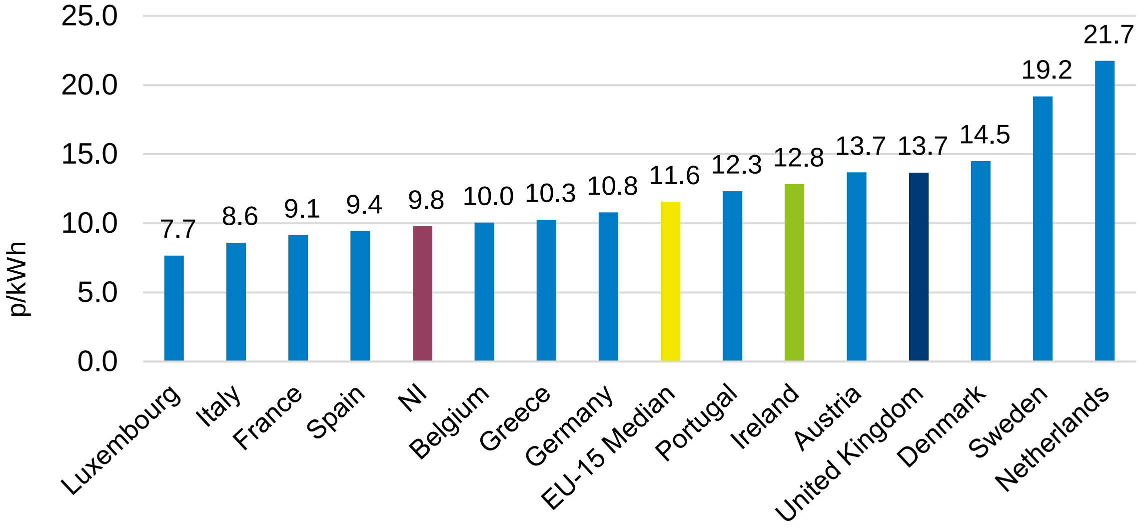
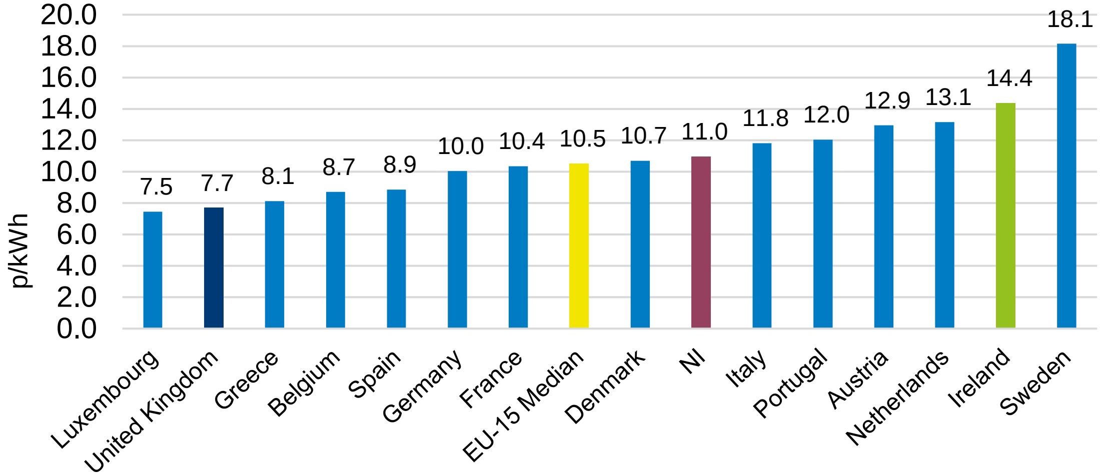


Figure 43: Medium domestic connections unit prices inc all taxes (p/kWh) July - December 2023



Source: Eurostat, DESNZ and NI gas suppliers collated by UR

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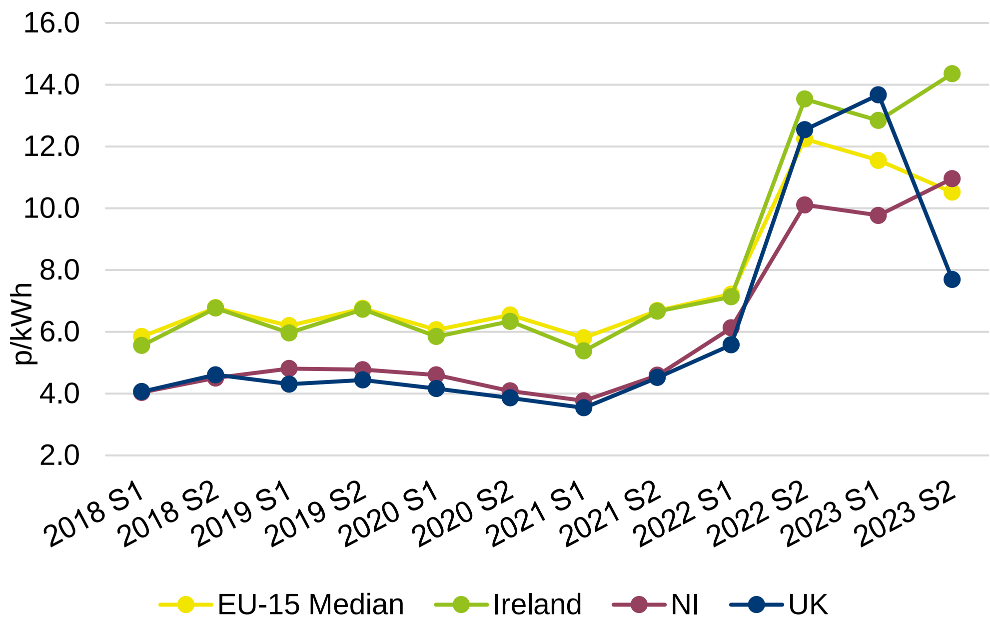
[19] The UK Government's Energy Price Guarantee scheme, which was implemented in November 2022, was withdrawn from 1 July 2023 due to falling wholesale energy prices. Various governments across the EU have taken different actions to mitigate against rising energy costs. This Eurostat article provides some information on the measures implemented for domestic gas consumers – link

Domestic gas prices

8.5 The graph to the right shows the medium domestic connections unit price (inc all taxes) over the last five years compared to the EU median, UK and Ireland.

Figure 44: Medium domestic connections - unit price over time



Source: Eurostat and NI gas suppliers collated by UR

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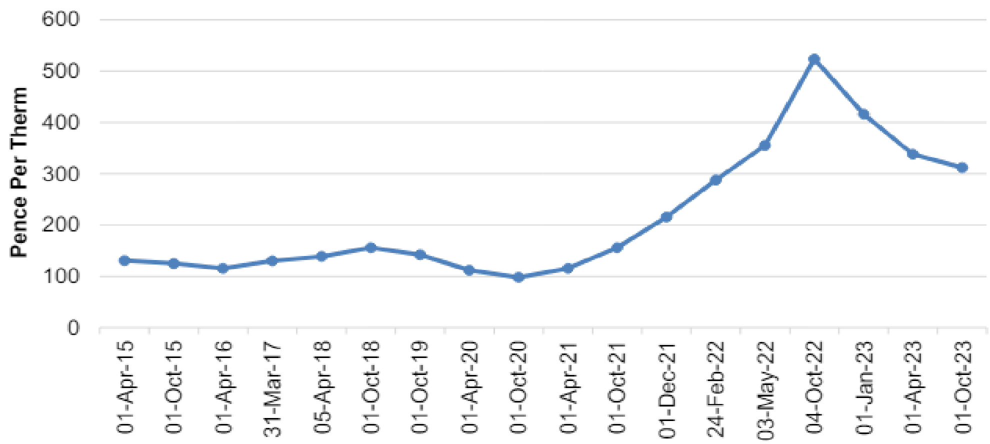
8.6

Domestic historical regulated maximum average price

8.7 During 2023, there have been a number of decreases to the regulated tariff within the Ten Towns and Greater Belfast & West areas. Further details on these regulated tariffs are available in the UR tariff review briefing papers[20].

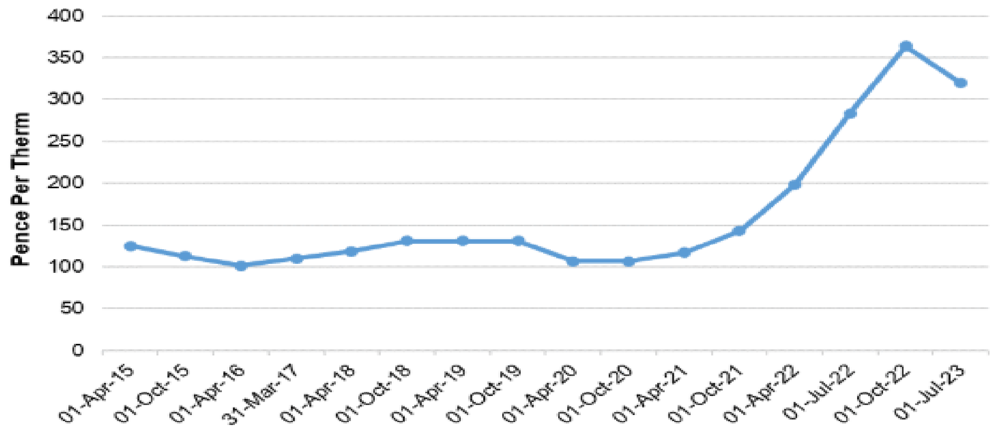
8.8 Firmus energy regulated tariffs have decreased during 2023 due to the decrease in the cost of wholesale gas. This is reflected in the figure opposite which shows the regulated maximum average price per therm. The dates reflect changes made to their regulated domestic tariff as announced by the UR.

Figure 45: Firmus energy historical regulated maximum average price (p/therm)



8.9 SSE Airtricity gas regulated tariff decreased during 2023 due to the decrease in the cost of wholesale gas. This is reflected in the figure opposite which shows the regulated maximum average price per therm. The dates reflect changes made to their regulated domestic tariff as announced by the UR.

Figure 46: SSE Airtricity historical regulated maximum average price (p/therm)



Source: Gas Regulated Tariff Reviews published by the UR and available here.

[20] UR gas regulated tariff briefing papers

I&C gas prices

8.10 I&C gas prices were first published for July - December 2023 within the Q1 2024 REMM report published June 2024[21].

8.11 **I&C price comparison with EU**: These figures show I&C gas unit prices which include Climate Change Levy (CCL) but exclude VAT, as VAT is a refundable expense for many businesses. This reflects the final prices paid by I&C customers. We also amalgamate the two largest categories of annual consumption (medium and large connections) to avoid any confidentiality issues in sectors where there are a small number of customers and suppliers involved.

8.12 During semester 2 2023 (July - December), the NI prices in the very small I&C category were below the EU median, the UK and Ireland (c86% of I&C connections in NI are in this size category). During the same period, for the medium and large I&C category, NI gas prices were slightly below the UK, and slightly above Ireland and the EU.

Figure 47: Very small connections prices excl. VAT, incl. other taxes (July – December 2023)

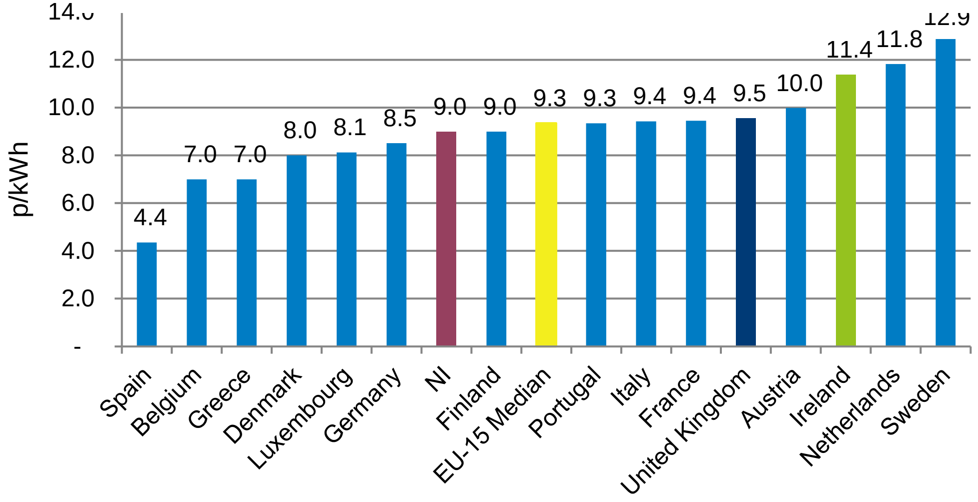


Figure 48: Small connections prices excl. VAT, incl. other taxes (July to December 2023)

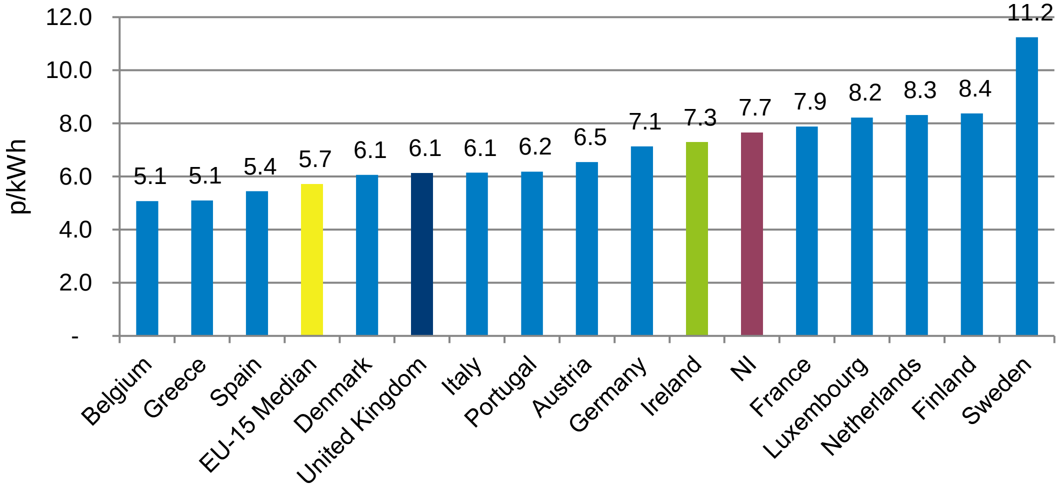
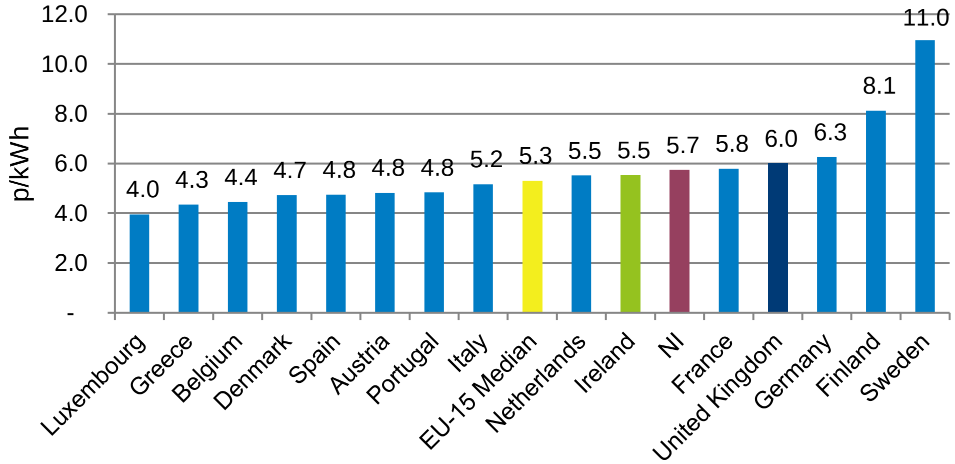


Figure 49: Medium and large connections prices excl. VAT, incl. other taxes (July to December 2023)



Source: Eurostat, DESNZ and NI gas suppliers collated by UR

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[21] Q1 2024 REMM Report which included pricing data for July to December 2023

9. Gas supplier complaints

9.1 This section of the report provides readers with information in relation to gas supplier complaints collated in 2023. The definition of a complaint is outlined in our Code of Practice minimum standards on Complaints Handling[22]. The complaints data is provided by gas suppliers as per the REMM framework[23][24].

Total supplier complaints

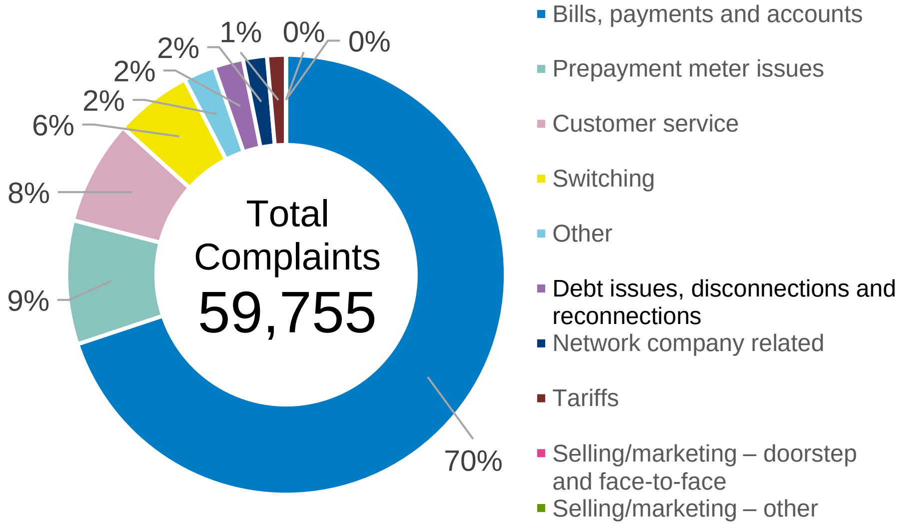
9.2 The table below shows the total number of complaints received by suppliers during 2023, per complaint type, for domestic and I&C customers. The corresponding graph to the right shows the percentage breakdown of the type of complaints made to suppliers during 2023 for all customers. The total number of gas complaints in 2023 increased from 42,734 in 2022 to 59,755.

9.3 During 2023, the three most common gas supplier complaints related to; bills, payments and accounts (70%), prepayment meter issues (9%) and switching (8%).

Table 21: Gas – total complaints

Complaint Type	No. of Domestic Complaints	No. of I&C complaints	No. of Total Complaints
Bills, payments and accounts	39,305	2,454	41,759
Prepayment meter issues	5,432	8	5,440
Customer service	4,367	231	4,598
Switching	3,380	20	3,400
Other	1,350	42	1,392
Debt issues, disconnections and reconnections	1,087	199	1,286
Network company related	1,024	30	1,054
Tariffs	790	31	821
Selling/marketing – doorstep and face-to-face	4	0	4
Selling/marketing – other	1	0	1
Total	**56,740**	**3,015**	**59,755**

Figure 50: Gas – total complaints by type



Source: Suppliers

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[22] A complaint is: "The expression (through various possible channels: letter, email, phone call or physical claim) of a person's dissatisfaction" as defined in the Code of Practice minimum standards on complaint handling (June 2015).
[23] REMM final decisions paper (June 2015).
[24] CCNI have a statutory duty to deal with customer complaints which they publish each year: CCNI Annual Complaints and Communication Report 2022/23

Annex A: Background & sources

Purpose, methodology and Sources

The framework in which this annual report lies is called Retail Energy Market Monitoring (REMM) which was introduced in 2015. The ultimate objective of introducing this enhanced framework was to develop the current monitoring of retail indicators, and to provide increased transparency in the retail energy markets in NI.

The main data sources for this report are as follows:

1. Connections and consumption, market shares and market activity information are provided by the network companies:
2. Northern Ireland Electricity Networks (NIEN) for electricity data; and
3. Phoenix Natural Gas Limited (PNGL), firmus energy (Distribution) Limited (feDL) and Evolve Networks (formerly SGN NG) for gas data.

EU domestic and I&C electricity prices are from Eurostat and the Department for Energy Security and Net Zero (DESNZ). NI domestic and I&C electricity prices are derived directly from REMM data submitted by suppliers. NI domestic gas prices are also derived from REMM data submitted by suppliers.

Electricity pricing

For the electricity prices section, we follow Eurostat's format and methodology. As a result the average prices for NI are comparable with prices in other EU countries (those published in the DESNZ Quarterly Energy Prices reports[25] and Eurostat data base[26]) once these figures have been converted to GBP (Note: from 01 January 2021, DESNZ (formerly BEIS) no longer provide pricing data to Eurostat. Therefore, the UK figures reported in the pricing graphs have been obtained directly from DESNZ publicised data).

The base figures are all submitted on a quarterly basis by suppliers, split by domestic and non-domestic (I&C). The UR performs a high-level reasonableness check of the base figures, but the suppliers are responsible for the accuracy of the information that is provided to the UR. The base figures are as follows:

[25] https://www.gov.uk/government/collections/quarterly-energy-prices
[26] http://ec.europa.eu/eurostat/web/energy/data/database

1. **Volume** of electricity sold to consumers.

2. The **value**, or revenue gained from the sale, split into three categories: excluding all taxes, excluding VAT, and including all taxes; and

3. The **number** of customers supplied in that particular size category.

The volume and value are used to calculate a NI quarterly average value per size band. This value per unit (per size band) is what we refer to in this paper as "price". For clarity we do not receive from suppliers the actual price paid by their customers. Instead we calculate the average value or revenue collected per unit in that particular size category, as per the Eurostat methodology.

As the Eurostat figures are published on a semester basis (semester 1 (S1) January to June and semester 2 (S2) July to December) we therefore average the two relevant quarters to obtain the comparable six-month period for NI.

It should be noted that the comparability of the derived NI prices to the other Member States can be greatly affected by fluctuations in the Euro GBP exchange rate. For the purposes of tariff comparison, we convert the EU tariff data from Euro to GBP using the monthly average exchange rate applicable for the semester (published by Eurostat). Therefore, tariff movements and comparisons between NI and other Member States can be impacted by both an increase and decrease in a tariff and/or also by any variation in exchange rates.

Gas pricing

The gas prices section also follows the Eurostat format and methodology (as outlined in Electricity Prices). As a result the average prices for NI are comparable with prices in other EU countries (those published in DESNZ's Quarterly Energy Prices reports[27] and Eurostat data base[28]) once these figures have been converted to GBP.

Electricity wholesale market monitoring data

Readers should also be aware of the Quarterly Market Monitoring Report which provides an overview of the Single Electricity Market (SEM) and sets out recent trends in the market in relation to pricing, demand, scheduling and contract prices. It focuses on the wholesale element of electricity prices, which makes up roughly 60% of customers' bills. These reports[29] are prepared by the Market Monitoring Unit (MMU) within the UR in joint collaboration with the Commission for Regulation of Utilities (CRU).

Northern Ireland gas markets

[27] www.gov.uk/government/collections/quarterly-energy-prices
[28] https://ec.europa.eu/eurostat/web/main/data/database
[29] The latest SEM market monitoring report is here

The gas distribution network licensees are responsible for the medium and low pressure mains that convey to the licensed areas throughout Northern Ireland. There are three Distribution Network Operators[30] (DNOs) who operate in separate distribution areas as follows:

1. firmus energy (Distribution) Ltd (feDL) from the North West through the Central region to the Southern areas of Northern Ireland;
2. Phoenix Natural Gas Ltd (PNGL) mainly Greater Belfast, Larne and an extension into East Down; and
3. Evolve Network Ltd (formerly SGN Natural Gas Ltd) in the West of Northern Ireland.

Each DNO owns and manages the natural gas distribution network in their distribution area. Those companies who supply gas (suppliers) pay the relevant DNO a fee to transport natural gas, and then sell it straight to the consumer. Although a DNO is responsible for making sure the natural gas reaches individual homes, it is the responsibility of the gas supplier to bill consumers for the gas they use.

Data download now available

To improve the accessibility of the data within the figures and tables contained in this AREMM report we have included access to a data download within Excel. This is available by clicking on the DATA DOWNLOAD icon shown on each of the relevant pages of the report. This Excel data download is also available from the Utility Regulator website where the REMM reports are accessed.

Contacts

For further information contact:

Retail Energy Market Monitoring Inbox
Email: REMM.Reporting@uregni.gov.uk

[30] Natural Gas NI – Natural Gas Network Operators and Suppliers

Annex B: Supplier entry to NI retail markets

The tables below set out the dates that each supplier entered the retail market sectors.

Electricity	
Domestic	Incumbent supplier: Power NI June 2010: SSE Airtricity June 2009: firmus supply June 2011: Budget Energy October 2011: Electric Ireland October 2015: Click Energy October 2015: Open Electric December 2016: Open Electric ceased supply October 2019: Go Power November 2020: Bright energy January 2022: Bright energy ceased supply
I&C	Incumbent supplier: Power NI July 1999: ESB Independent Energy (NI) t/a Electric Ireland August 1999: Energia January 2008: SSE Airtricity April 2009: firmus supply[34] July 2011: Budget Energy February 2012: VAYU (Naturgy as of 29th November 2018) (Flogas Enterprise Solutions Ltd as of 20th December 2021) April 2012: Go Power October 2015: Click Energy April 2018: 3T Power October 2019: Energia supply business transferred to Power NI

Gas: Greater Belfast[31]	
Domestic	Incumbent supplier since September 1996: SSE Airtricity[32]
I&C	Incumbent supplier since September 1996: SSE Airtricity September 2008: firmus energy March 2009: Vayu (Naturgy as of 29th November 2018) (Flogas Enterprise Solutions Ltd as of 20th December 2021) May 2013: Electric Ireland August 2014: Go Power December 2014: Flogas
Gas: Ten Towns[33]	
Domestic	Incumbent supplier since 2005: firmus
I&C	Incumbent supplier since 2005: firmus January 2013: SSE Airtricity May 2015: Flogas June 2015: Go Power January 2017: Vayu (Naturgy as of 29th November 2018) (Flogas Enterprise Solutions Ltd as of 20th December 2021) April 2017: Electric Ireland
Gas: West[35]	
Domestic	July 2017 Designated Commissioning Supplier: SSE Airtricity
I&C	January 2017: Electric Ireland July 2017: SSE Airtricity January 2018: Flogas Q1 2019: firmus energy Q3 2019: Go Power

[31] The Greater Belfast area is defined in Schedule 1 of the Phoenix Natural Gas Limited conveyance licence.
[32] Formerly Phoenix Supply Ltd (PSL).
[33] The Ten Towns area is defined in Schedule 1 of the firmus energy (Distribution) Limited conveyance licence.
[34] Note that firmus supply left the electricity market at the end of 2015.
[35] The West area is defined in Schedule 1 of the Scotia Gas Networks Northern Ireland Ltd (Distribution) Limited conveyance licence.

Glossary

CCL	The Climate Change Levy (CCL) is a tax on electricity, gas and solid fuels delivered to I&C consumers. Its objective is to encourage businesses to reduce their energy consumption or use energy from renewable sources. The rate changes every year.	Ofgem	Office of the Gas and Electricity Markets
CoS	Change of supplier	PNGL	Phoenix Natural Gas Limited
EU	European Union	Q	Quarter. In this report, Q refers to the calendar year (i.e. Q1 refers to the quarter January-March).
Eurostat	Statistical office of the EU. Its task is to provide the EU with statistics at European level that enable comparisons between countries and regions	QTRs	Quarterly Transparency Reports published by the UR at the end of the second month after each calendar quarter (at the end of Feb, May, Aug and Nov).
feDL	firmus energy (Distribution) Limited	REMM	Retail Energy Market Monitoring
firmus energy	firmus energy (Supply) Limited	SGN NG	SGN Natural Gas
GB	Great Britain	S1	Semester 1
GBP	Great British Pound	S2	Semester 2
I&C	Industrial and Commercial	UR	Utility Regulator
kWh	Kilowatt hour. Unit of energy equivalent to one kilowatt (1kW) of power expended for one hour (1h) of time. 1,000kWh = 1MWh. 1,000MWh = 1GWh.	VAT	Value Added Tax
NI	Northern Ireland	UK	United Kingdom
NIEN	Northern Ireland Electricity Networks		