ANNUAL RETAIL ENERGY MARKET MONITORING REPORT

Period: 1 January to 31 December 2024

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www.uregni.gov.uk

Utility Regulator

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 Millennium 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.

Utility Regulator

OUR MISSION

To protect the short and long-term interests of consumers of electricity, gas and water.

OUR VISION

To ensure value and sustainability in energy and water.

OUR VALUES

ACCOUNTABLE: We take ownership of our actions.

TRANSPARENT: Ensuring trust through openness and honesty.

COLLABORATIVE: Connecting and working with others for a shared purpose.

DILIGENT: Working with care and rigour.

RESPECTFUL: Treating everyone with dignity and fairness.

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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active suppliers

Suppliers
Gas

	Greater Belfast	Ten Towns	West
Active suppliers to DOMESTIC gas customers	2	1	1
Active suppliers to BUSINESS gas customers	6	6	5

Switching Data
Electricity

2024

OVER
98,600

Budget Energy
UP
13,900+
net switches

Electric Ireland
DOWN
27,400+
net switches

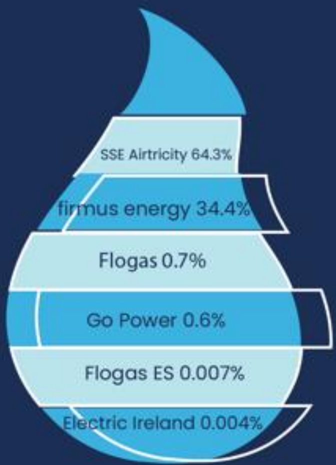
Switching Data
Gas

OVER
2,300

743
I&C
Switches

Total market share by connections
Electricity

Total market share by connections
Gas



Domestic pricing data
Electricity

31.9p/kWh
January - June 2024

NI domestic electricity prices were
above the EU Median

30.1p/kWh
July - December 2024

Domestic pricing data
Gas

11.0p/kWh
January - June 2024

NI domestic gas prices were
below the EU Median

9.9p/kWh
July - December 2024

1. Key developments during 2024

1. The following are new to this annual REMM report with more detail provided in this report and the REMM Framework:
    - Electricity - Sticky customers
    - Gas - Sticky customers
    - Gas – Medium and large I&C analysis by connection
    - Gas – Domestic and small I&C analysis by consumption
2. Market activity in the electricity sectors shows that Power NI (the incumbent price-controlled electricity supplier) retained their market share during 2024 with 59.9% of connections compared to 59.3% in 2023.
3. Domestic electricity customers continue to engage in the market with over c93,000 customers switching supplier during 2024, although this represents a decrease of 23% of the domestic market (c121,000 in 2023). Electricity I&C switching activity also decreased from c7,000 in 2023 to c5,300 in 2024.
4. In the gas sector, there was a significant decrease (55%) in total switches during the year, with c2300 total switches compared to c5100 in 2023. This was split c1,500 domestic switches (domestic switching only applies to the Greater Belfast area) and c740 I&C switches.
5. The semester 2 (July to December) 2024 **electricity pricing**[1] data is sourced from Eurostat, DESNZ and individual supplier's submissions. The pricing data for the period illustrates the following:
    - NI domestic electricity prices (30.1 p/kWh) were below Ireland (31.3 p/kWh) but above the UK (28.7 p/kWh) and the EU median (22.9 p/kWh).
    - The NI I&C electricity price for the very small connections (which represent c71% of I&C connections) was 28.5 p/kWh, which was lower than the UK (31.5 p/kWh) and Ireland (31.4 p/kWh) but higher than the EU median (22.7 p/kWh).
    - For large and very large I&C customers (c0.03% of connections) NI prices (16.9 p/kWh) were below the UK (24.9 p/kWh) and Ireland (17.4 p/kWh) but higher than the EU median (10.6 p/kWh).

6. The semester 2 (July – December) 2024 **gas pricing**[1] data is sourced from Eurostat, DESNZ and individual supplier's submissions. The pricing data for the period illustrates the following:
    - NI domestic gas prices for NI (9.9 p/kWh) were below Ireland (11.3 p/kWh) and the EU (10.7 p/kWh). This was higher than the UK (6.8 p/kWh).
    - The NI I&C gas price for the very small connections was 8.7 p/kWh which was below the UK (9.3 p/kWh) but above the EU median (7.9 p/kWh) and Ireland (8.6 p/kWh).
    - For medium and large I&C customers NI gas prices (5.8 p/kWh) were higher than the UK (4.5p/kWh), EU median (3.9 p/kWh) and Ireland (3.2 p/kWh).
7. During 2024, there were c31,000 electricity complaints made by domestic and I&C customers and c63,900 gas complaints made by customers to their suppliers. This is a similar level for electricity complaints (c31000 in 2023)but an increase of c4,100 gas complaints during 2024. The most common supplier complaint made during 2024 related to bills, payments and accounts.

[1] Pricing data within the AREMM (and also within our Quarterly reports): the unit prices provided include an average of all the tariffs offered by all suppliers, which could include 30+ from one supplier. When we publish comparison information within the regulated supplier tariff announcements, we use the standard domestic tariff. In addition, comparison dates will also need to be considered – for example the AREMM contains 2024 pricing data, whereas our most recent comparison included in the latest tariff reviews is correct from 1 October 2025.

2. Introduction

2.1 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.

2.2 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. Therefore, monitoring the retail markets is key when complying with our statutory duties[2].

Energy suppliers in NI market

	Network Operator							
	NIE Networks		PNGL[3]		FeDL[4]		Evolve (formerly SGN)[5]	
	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[6]		💡		💧		💧		
3T Power		💡						
Share Energy	💡	💡						
Suppliers	**7**	**9**	**2**	**6**	**1**	**6**	**1**	**5**

Source: Utility Regulator

[2] Detail on the background to this report, information sources and methodology is contained in Annex A.
[3] Phoenix Natural Gas Ltd
[4] Firmus Energy (Distribution) Ltd
[5] Evolve Network, previously known as SGN up to September 2023
[6] Flogas Enterprise Solutions, previously known as Naturgy Ltd.

2.3 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.

2.4 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.

2.5 At the end of 2024 there were **nine** suppliers in the electricity market and **six** suppliers in the gas market although not all of these suppliers are certified to operate in all sectors (or in all gas distribution areas).

2.6 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.

3. Electricity

Electricity 2024

Total Electricity Connections

(end of Q4 2024)

925,584

848,983
Domestic Connections

Domestic Credit = 461,018
Domestic Prepayment = 387,965

76,601
I&C Connections

I&C <20 MWh = 54,318
I&C 20 - 49 MWh = 12,077
I&C 50 - 499 MWh = 9,156
I&C 500 - 1,999 MWh = 790
I&C 2,000 - 19,999 MWh = 241
I&C > 20,000 MWh = 19

Total Electricity Consumption

(2024)

7,272 GWh

2,722.4 GWh
Domestic Consumption

Domestic Credit = 1,558.0 GWh
Domestic Prepayment = 1,164.4 GWh

4,549.7 GWh
I&C Consumption

I&C <20 MWh = 303.8 GWh
I&C 20 - 49 MWh = 351.6 GWh
I&C 50 - 499 MWh = 1202.6 GWh
I&C 500 - 1,999 MWh = 762.7 GWh
I&C 2,000 - 19,999 MWh = 1,245.8 GWh
I&C > 20,000 MWh = 683.2 GWh

Total Electricity Complaints

30,672

Domestic Electricity Pricing

31.9 p/kWh
January - June 2024

30.1 p/kWh
July - December 2024

Total Electricity Switches

98,609

Total NI electricity market shares by connections

3.1 The chart[7] to the right shows the percentage market share by connections[8] for each electricity supplier at the **end of December 2024**.

3.2 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 59.9% share of the market.

3.3 Electric Ireland announced on 9 May 2024 that they would be leaving the domestic electricity market[9]. Share Energy entered the market in September 2024.

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

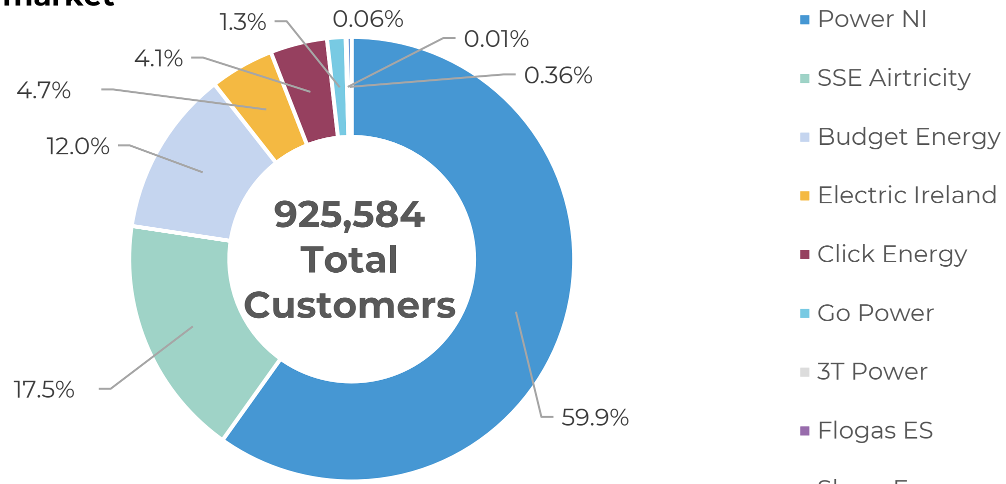


Table 1: Total electricity market share by connections

Market Segment	Power NI	SSE Airtricity	Budget Energy	Electric Ireland	Click Energy	Go Power	3T Power	Flogas ES	Share Energy	Total Customers
Domestic credit	308,833	104,167	16,918	18,287	10,558	1,257	0	0	998	461,018
Domestic prepayment	208,184	43,726	93,515	14,995	25,239	0	0	0	2,306	387,965
I&C < 20 MWh	29,034	10,022	656	5,692	1,430	7,195	254	32	3	54,318
I&C 20 – 49 MWh	4,642	2,715	187	1,764	538	2,104	116	11	0	12,077
I&C 50 – 499 MWh	3,052	1,473	74	2,035	531	1,765	171	49	6	9,156
I&C 500 – 1,999 MWh	238	113	0	263	22	117	13	24	0	790
I&C 2,000 – 19,999 MWh	83	17	0	101	7	25	1	7	0	241
I&C ≥ 20,000 MWh	0	5	0	12	0	2	0	0	0	19
Total	**554,066**	**162,238**	**111,350**	**43,149**	**38,325**	**12,465**	**555**	**123**	**3,313**	**925,584**

Data source: Northern Ireland Electricity Network (NIEN)

[7] 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.
[8] Note that long-term vacant sites are not included in connection numbers, and that combined premises are included in the <20MWh category.
[9] [Electric Ireland pulls out of NI residential electricity market - BBC News]

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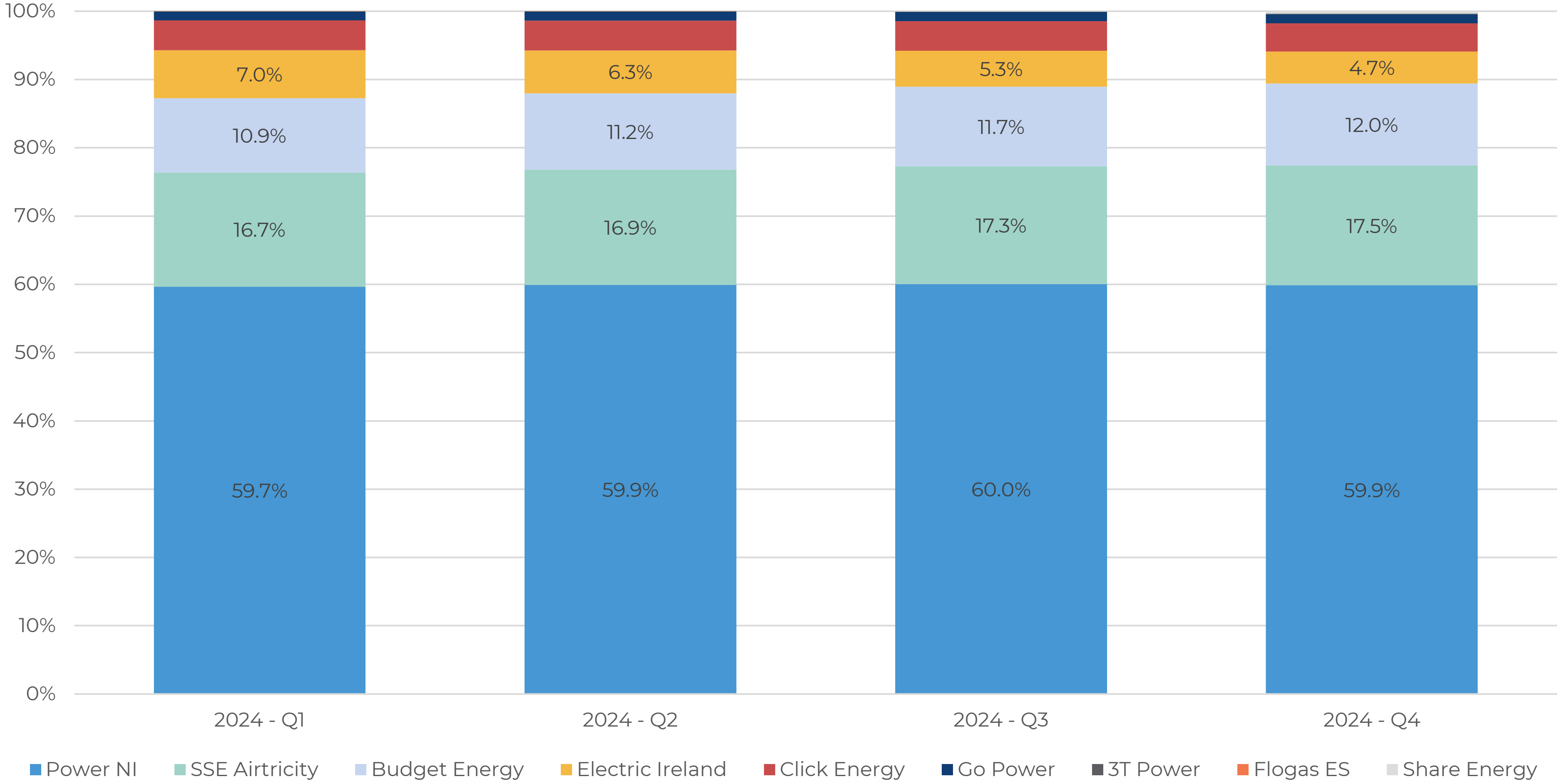
3.4 The bar chart below shows the trends in the market shares (by customer numbers) for each active domestic and I&C supplier in NI for the four quarters of 2024.

Figure 2: Electricity market share by connections (over time) – total NI market



Data source: NIEN

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Total NI electricity market shares by consumption

3.5 The chart to the right shows the percentage market share by consumption for each electricity supplier for the period **January to December 2024.**

3.6 Electricity consumption in the NI retail market for 2024 was 7,272 GWh. Per customer type, domestic consumers consumed 2,722 GWh and non-domestic consumers 4,550 GWh during 2024.

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

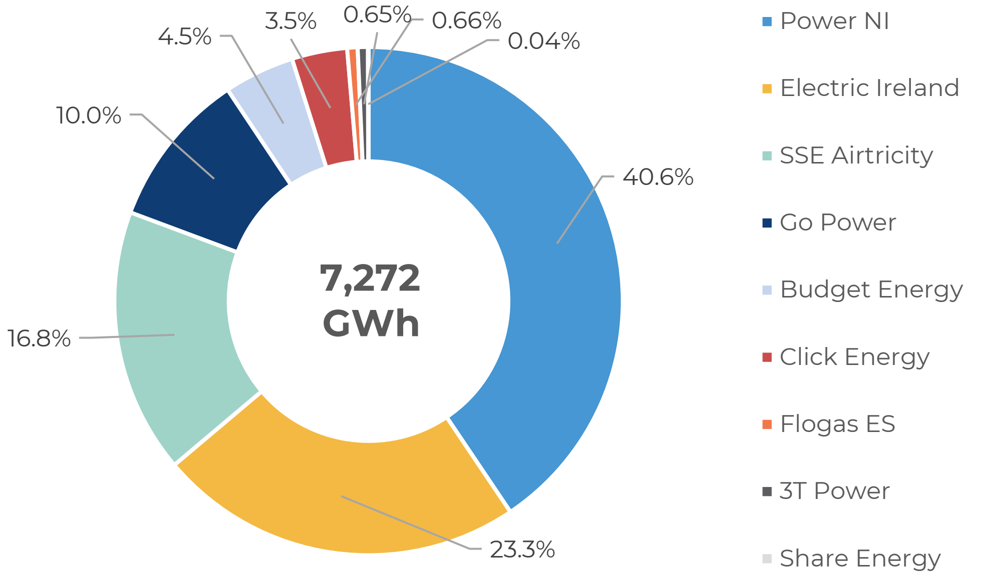

Table 2: Total electricity market share by consumption (GWh)

Market Segment	Power NI	Electric Ireland	SSE Airtricity	Go Power	Budget Energy	Click Energy	Flogas ES	3T Power	Share Energy	Total Consumption
Domestic credit	1,013	81	349	8	52	54	0	0	1	1,558
Domestic prepayment	638	57	121	0	261	85	0	0	1	1,164
I&C < 20 MWh	154	37	62	41	3	6	0	1	0	304
I&C 20 – 49 MWh	137	57	83	57	5	11	0	3	0	352
I&C 50 – 499 MWh	394	316	201	210	5	45	6	26	0	1,203
I&C 500 – 1,999 MWh	244	233	105	134	0	19	15	13	0	763
I&C 2,000 – 19,999 MWh	372	577	111	119	0	36	27	4	0	1,246
I&C ≥ 20,000 MWh	0	334	193	156	0	0	0	0	0	683
Total	**2,951**	**1,692**	**1,224**	**725**	**326**	**256**	**48**	**47**	**3**	**7,272**

Data source: NIEN

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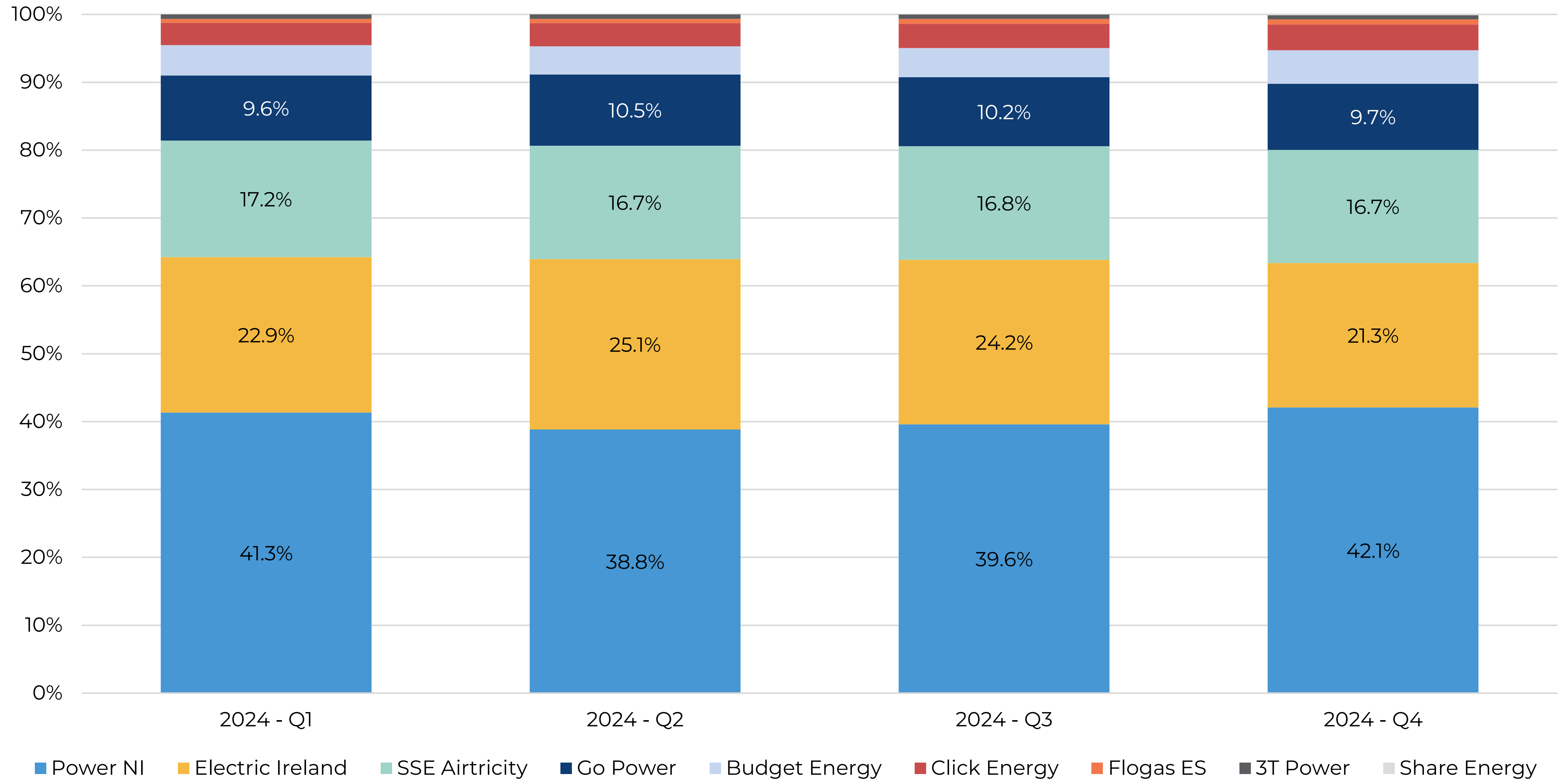
3.7 The bar chart below shows the trends in the market shares (by consumption) for each active domestic and I&C supplier in NI for the four quarters of 2024.

Figure 4: Electricity market share by consumption (over time) – total NI market



Data source: NIEN

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Domestic electricity market analysis by connections

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

3.9 The non-incumbents now represent 39.1% of total domestic connections in NI.

Figure 5: Electricity domestic market share (by connections) by market segment

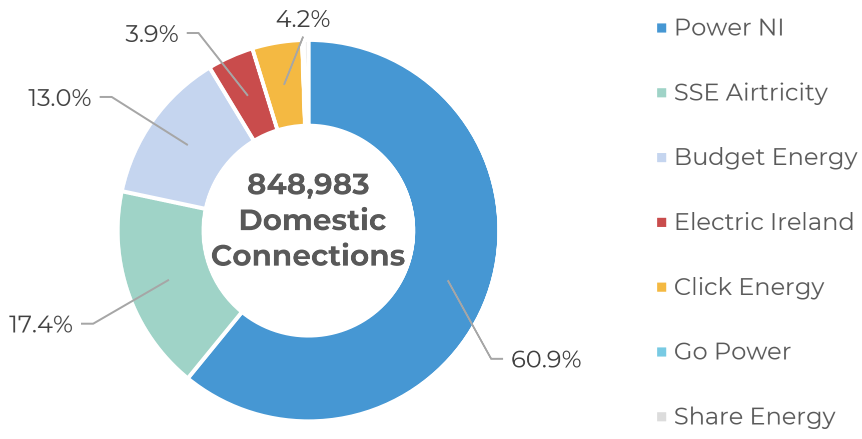

Figure 6: Electricity domestic market share by connections

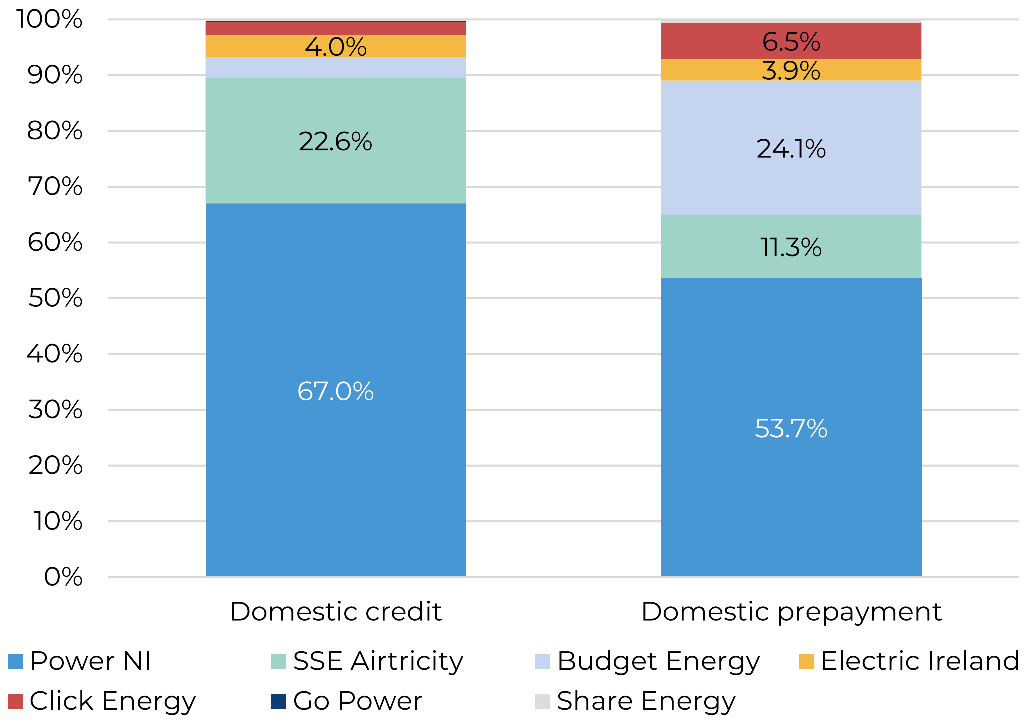

Table 3: Electricity domestic connections by market segment

Market Segment	Power NI		SSE Airtricity		Budget Energy		Electric Ireland		Click Energy		Go Power		Share Energy		Total Customers	
	Number	%	Number	%	Number	%	Number	%	Number	%	Number	%	Number	%	Number	%
Domestic prepayment	208,184	40%	43,726	30%	93,515	85%	14,995	45%	25,239	71%	0	0%	2,306	70%	387,965	46%
Domestic credit	308,833	60%	104,167	70%	16,918	15%	18,287	55%	10,558	29%	1,257	100%	998	30%	461,018	54%
Total	**517,017**		**147,893**		**110,433**		**33,282**		**35,797**		**1,257**		**3,304**		**848,983**	

Data source: NIEN

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I&C electricity market analysis by consumption

3.10 This section of the report provides a more detailed analysis of the electricity I&C market, by consumption. I&C consumption for the period was 4,550 GWh.

Figure 7: Electricity I&C market share (by consumption) by market segment

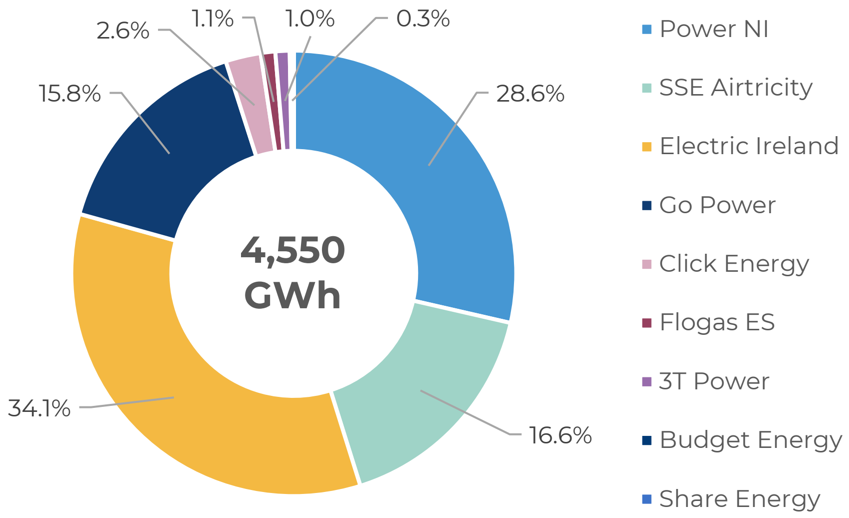

Figure 8: Electricity I&C market share (by consumption) by market segment

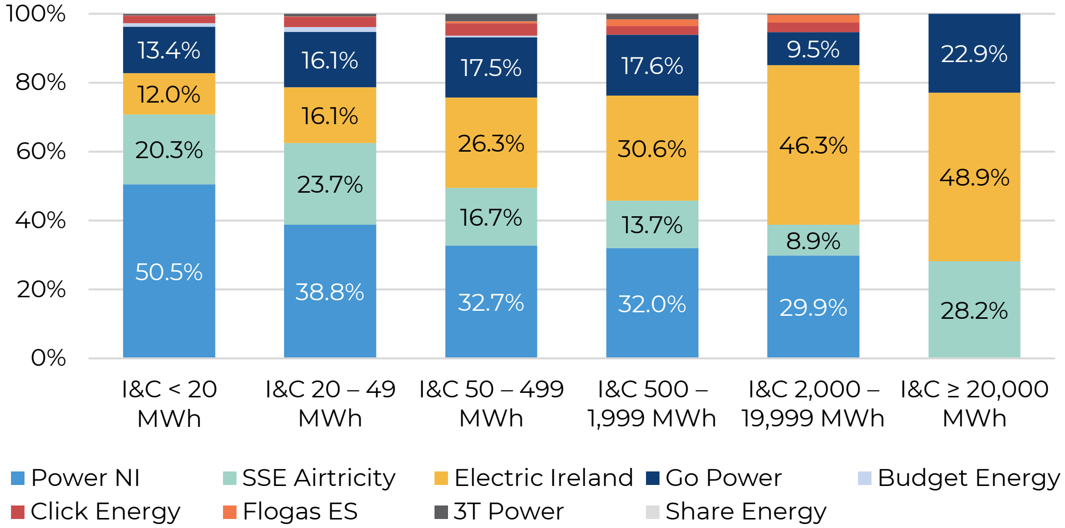

Table 4: Electricity I&C consumption by market segment

Market Segment	Electric Ireland	Power NI	SSE Airtricity	Go Power	Click Energy	Flogas ES	3T Power	Budget Energy	Share Energy	Total Consumption
I&C < 20 MWh	36.5	153.5	61.5	40.9	6.4	0.3	1.5	3.2	0.0	303.8
I&C 20 – 49 MWh	56.7	136.6	83.3	56.5	10.6	0.3	2.7	5.0	0.0	351.6
I&C 50 – 499 MWh	315.8	393.8	201.1	210.1	44.6	6.0	26.1	4.9	0.2	1,202.6
I&C 500 – 1,999 MWh	233.0	244.2	104.6	134.3	19.3	14.7	12.6	0.0	0.0	762.7
I&C 2,000 – 19,999 MWh	577.4	371.9	111.2	118.7	35.6	26.9	4.2	0.0	0.0	1,245.8
I&C ≥ 20,000 MWh	334.1	0.0	192.9	156.2	0.0	0.0	0.0	0.0	0.0	683.2
Total	**1,553.5**	**1,300.0**	**754.6**	**716.7**	**116.5**	**48.1**	**47.1**	**13.0**	**0.2**	**4,549.7**

Data source: NIEN

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Electricity – new domestic and I&C connections

3.11 This section of the report provides an analysis of the electricity new domestic and I&C connections, for the four quarters of 2024.

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

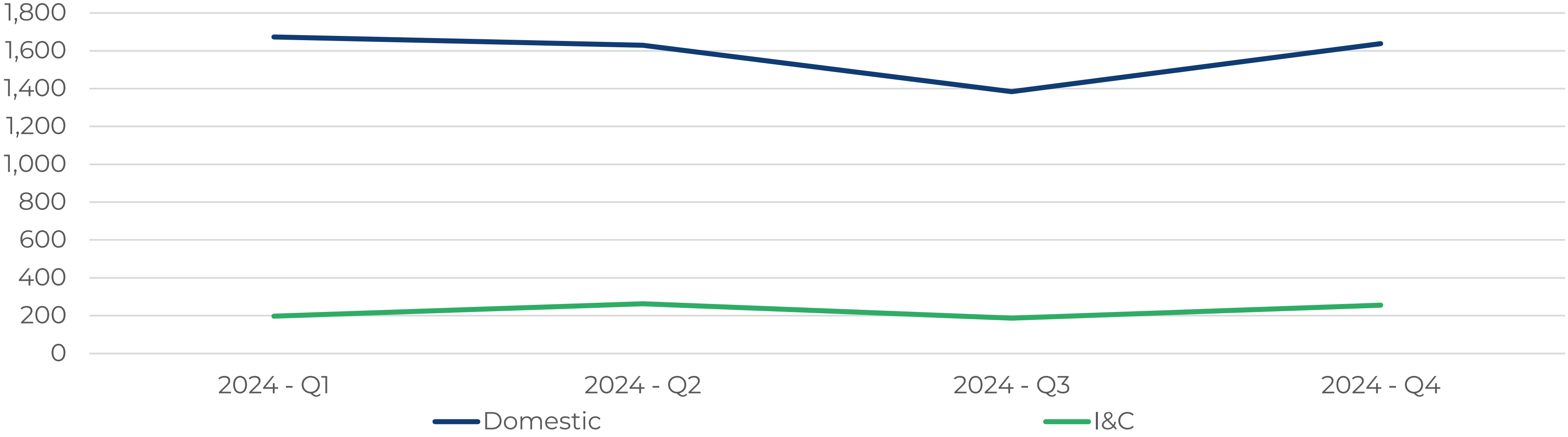

Table 5: Number of New Domestic and I&C Connections

Customer Type	2024 - Q1	2024 - Q2	2024 - Q3	2024 - Q4	Total
Domestic	1,673	1,629	1,384	1,638	6,324
I&C	198	263	187	256	904
Total	**1,871**	**1,892**	**1,571**	**1,894**	**7,228**

Data Source: NIEN

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Electricity - Market activity - switching

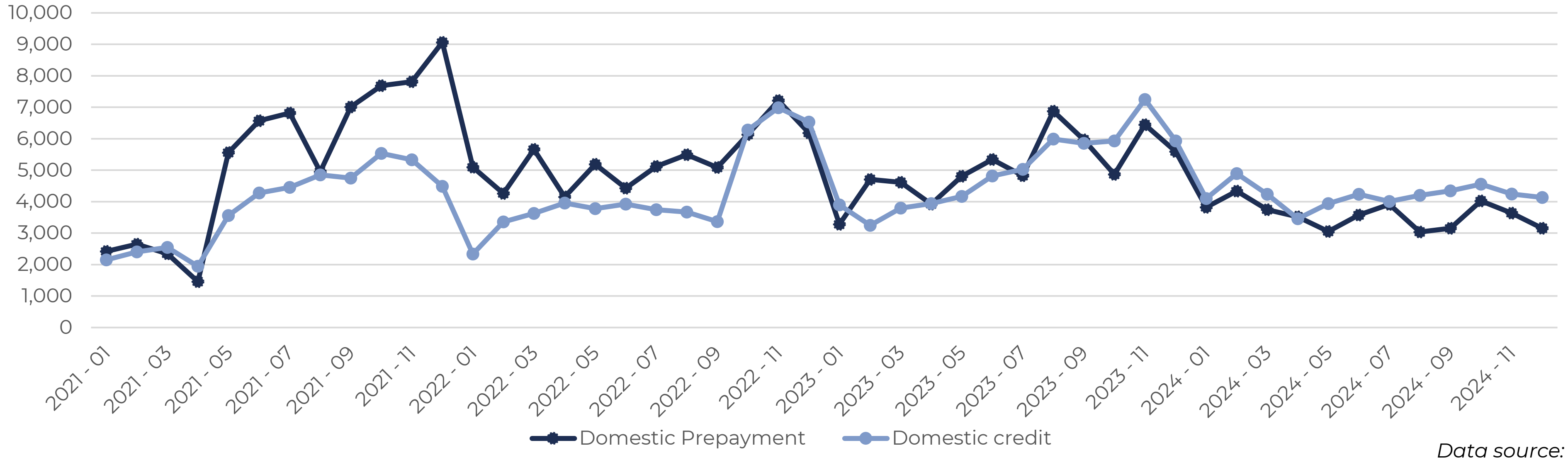
3.12 The table below shows the total market activity through changes of supplier (CoSs) on a quarterly basis for the domestic and I&C sectors including the quarterly switching rate[10]. The total number of switches in 2024 was 98,609, which is 23% lower than 2023 (128,166).

Table 6: Switching rate – total NI market

Quarter	2024 - Q1	2024 - Q2	2024 - Q3	2024 - Q4	Total
Number of Switches	26,471	23,141	24,058	24,939	98,609
Switching rate (%)	2.9%	2.5%	2.6%	2.7%	10.7%

3.13 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 the quarter.

Figure 10: Electricity - monthly domestic switching



Data source: NIEN

[10] 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.

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Table 7: Switching rate – domestic market

Quarter	2024 - Q1	2024 - Q2	2024 - Q3	2024 - Q4	Total
Number of Switches	25,134	21,780	22,661	23,752	93,327
Switching rate (%)	3.0%	2.6%	2.7%	2.8%	11.0%

3.14 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 in 2024.

Figure 11: Electricity - monthly I&C switching

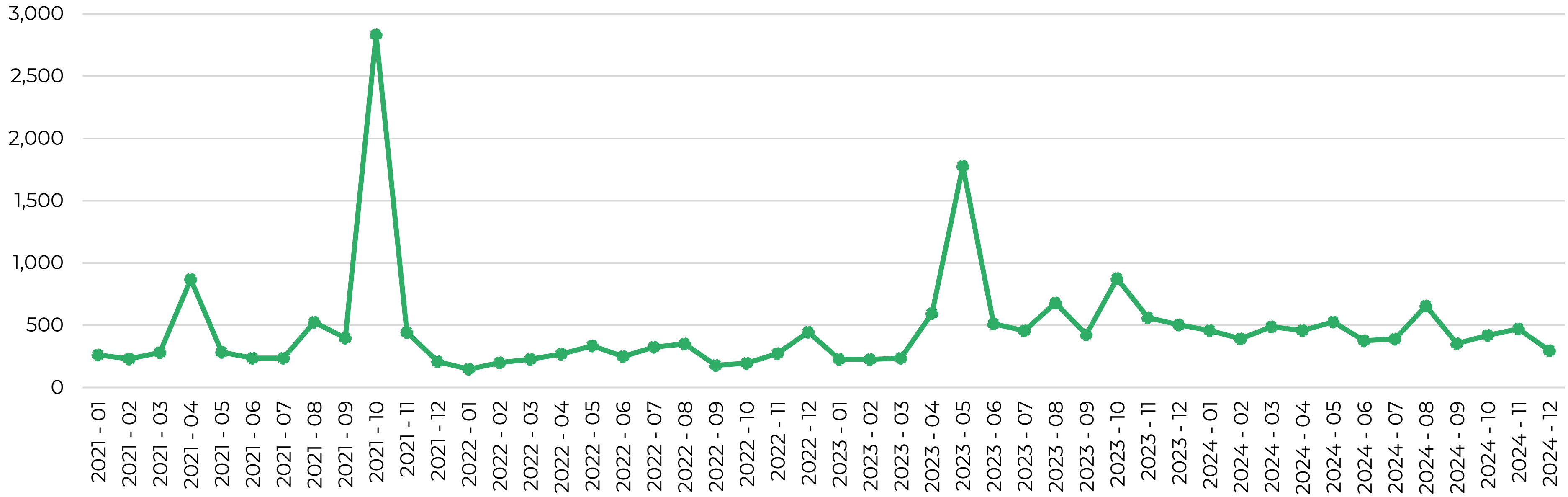

Table 8: Switching rate – I&C market

Quarter	2024 - Q1	2024 - Q2	2024 - Q3	2024 - Q4	Total
Number of Switches	1,337	1,361	1,397	1,187	5,282
Switching rate (%)	1.8%	1.8%	1.8%	1.5%	6.9%

Data Source: NIEN

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Electricity - Sticky customers

3.15 This is a newly published metric and is published here in the 2024 AREMM for the first time. Within the REMM framework[11] sticky customers are those who have never switched from the incumbent supplier. Below we show domestic and I&C information separately.

Table 9: Domestic sticky customers by connection

Market Activity	Domestic Connections	%
Never Switched	414,185	49%
Switched 3+ years ago	196,268	23%
Switched in last 3 years	238,530	28%
Total	**848,983**	**100%**

Figure 12: Domestic sticky customers as percentage of total domestic connections

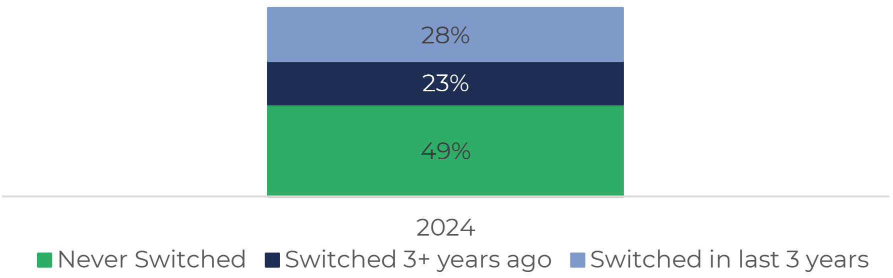
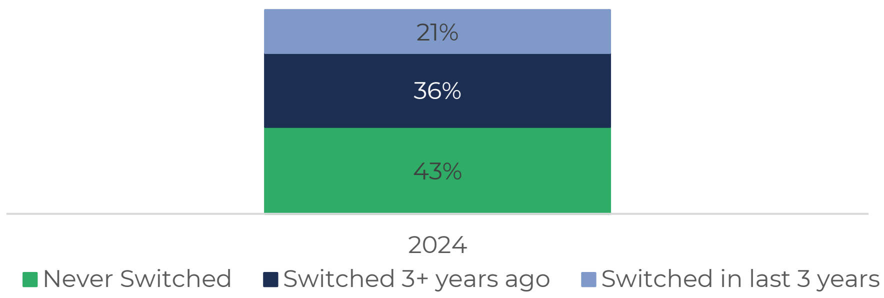


Table 10: I&C sticky customers by connection

Market Activity	I&C Connections	%
Never Switched	32,735	43%
Switched 3+ years ago	27,788	36%
Switched in last 3 years	16,078	21%
Total	**76,601**	**100%**

Figure 13: I&C sticky customers as percentage of total I&C connections



Data Source: NIEN

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[11] 2015 REMM Framework.pdf

4. Electricity pricing[12] – 2024

4.1 **<u>Domestic price</u> comparison with EU:** 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.

4.2 Figure 14 shows the domestic unit price (for medium sized customers) for semester 1 2024 (January – June) and Figure 15 shows the same information but for semester 2 2024 (July to December).

4.3 During 2024 the NI domestic price was comparable with Ireland and higher than UK and EU-15 median.

Figure 14: Medium domestic connections unit prices incl. all taxes (January - June 2024)

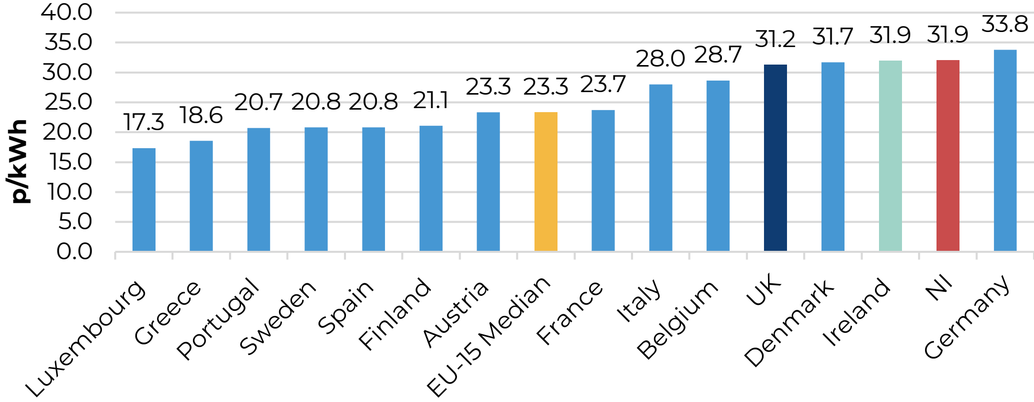
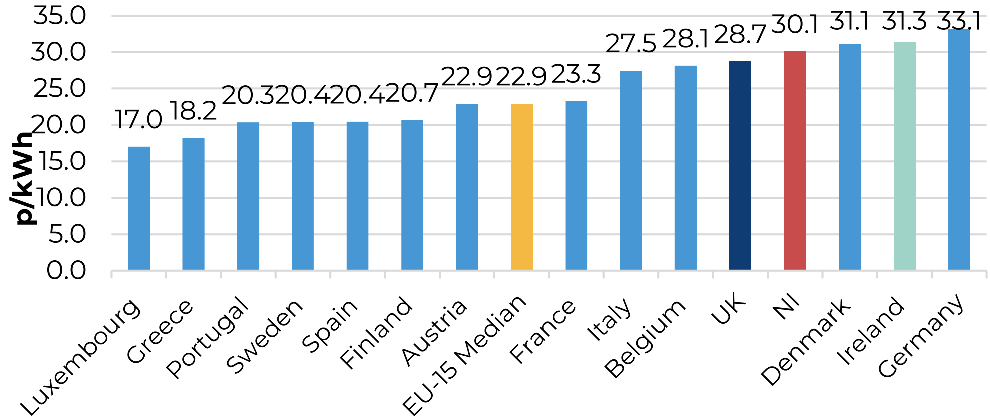


Figure 15: Medium domestic connections unit price incl. all taxes (July – December 2024)



Data source: NI electricity suppliers, DESNZ, Eurostat and UR internal calculations

[12] Pricing data within the AREMM (and also within our Quarterly reports): the unit prices provided include an average of all the tariffs offered by all suppliers, which could include 30+ from one supplier. When we publish comparison information within the regulated supplier tariff announcements, we use the standard domestic tariff. In addition, comparison dates will also need to be considered – for example the AREMM contains 2024 pricing data, whereas our most recent comparison included in the latest tariff reviews is correct from 1 October 2025.

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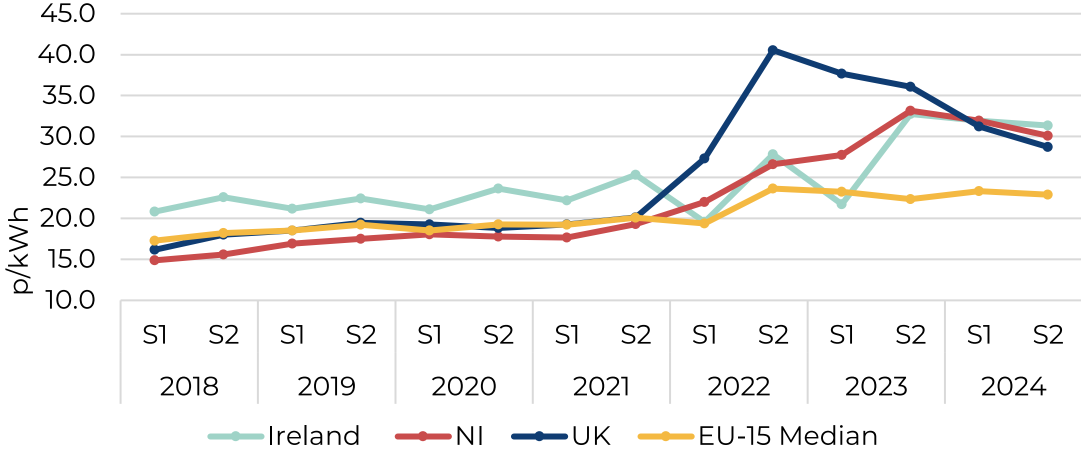
4.4 Figure 16 opposite shows the medium domestic connections unit price (inc all taxes) over the last seven years compared to the EU median, UK and Ireland.

Figure 16: Medium domestic connections - unit price incl. all taxes over time



Data source: NI electricity suppliers, DESNZ, Eurostat and UR internal calculations

4.5 **<u>I&C price</u> comparison with EU[13]**: The graphs below show I&C electricity prices in the 15 EU[14] 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.

4.6 During semester 1 2024 (Jan – June) the NI prices in the very small I&C category were lower than Ireland and UK but higher than the EU median (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.

4.7 During semester 2 2024 (July – December) the NI prices in the very small I&C category were lower than Ireland and UK but higher than the EU median (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.

[13] 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 non -domestic electricity consumers – link.
[14] Some graphs do not include all 15 EU countries due to availability of data from Eurostat.

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Table 11: I&C connections and consumption end of Q2 2024

Size of Customer	Annual Consumption bands (MWh)	% of I&C connections	% of I&C consumption	I&C connection numbers
Very small	< 20	71.0%	7.2%	54,011
Small	20 – 499	27.7%	35.1%	21,050
Small / Medium	500 – 1,999	1.0%	16.7%	798
Medium	2,000 – 19,999	0.3%	26.6%	238
Large & Very Large	>20,000	0.0%	14.4%	17

Table 12: I&C connections and consumption end of Q4 2024

Size of Customer	Annual Consumption bands (MWh)	% of I&C connections	% of I&C consumption	I&C connection numbers
Very small	< 20	70.9%	6.1%	54,318
Small	20 – 499	27.7%	33.5%	21,233
Small / Medium	500 – 1,999	1.0%	16.6%	790
Medium	2,000 – 19,999	0.3%	28.1%	241
Large & Very Large	>20,000	0.02%	15.7%	19

Source: NIEN

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Figure 17: Very small I&C connections unit prices incl. all taxes (January - June 2024)

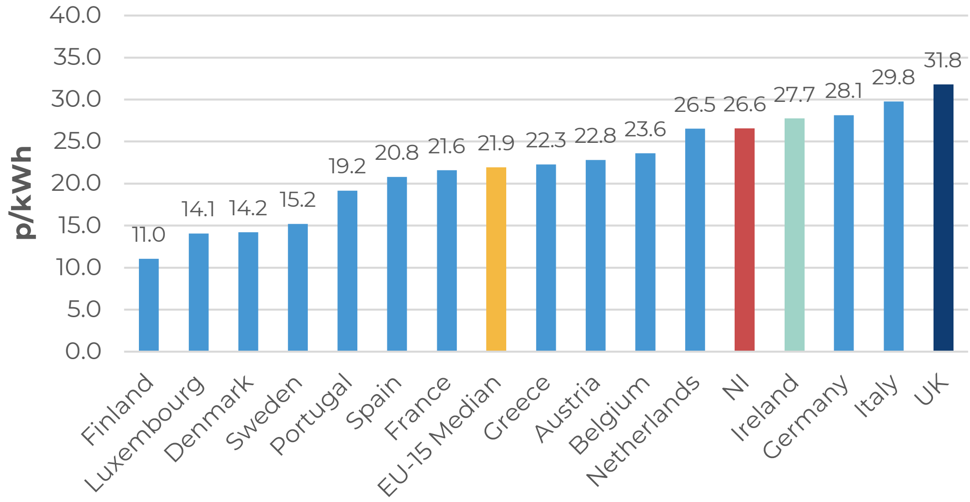


Figure 18: Very small I&C connections unit prices incl. all taxes (July – December 2024)

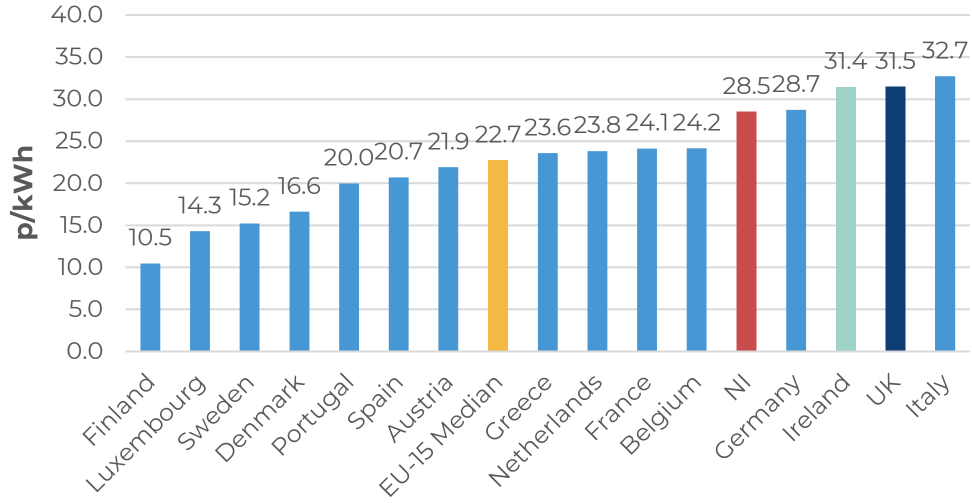


Figure 19: Small I&C connections unit prices incl. all taxes (January - June 2024)

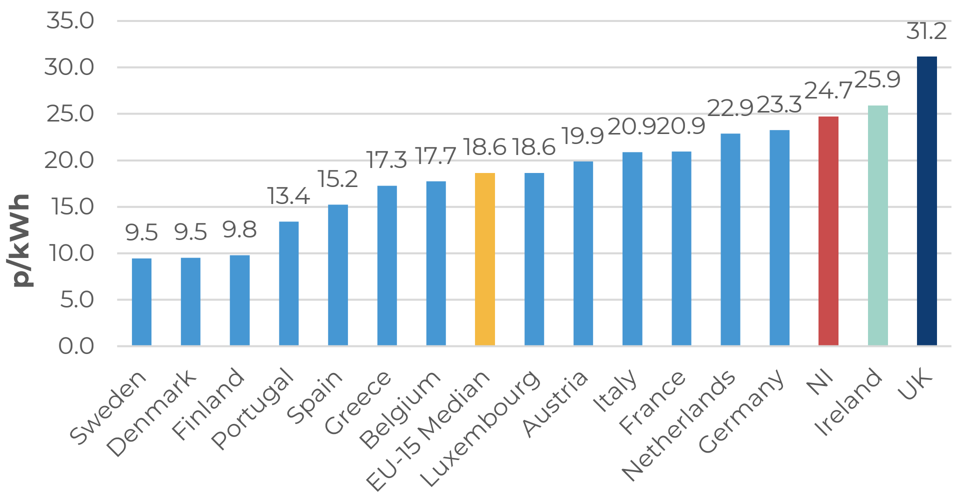
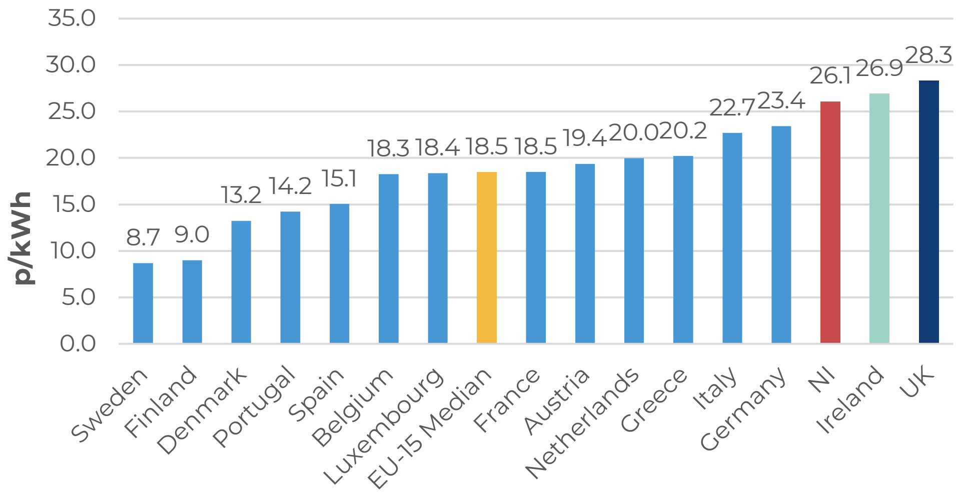


Figure 20: Small I&C connections unit prices incl. all taxes (July - December 2024)



Data source: NI electricity suppliers, DESNZ, Eurostat and UR internal calculations

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Figure 21: Small/Medium I&C connections unit prices incl. all taxes (January - June 2024)

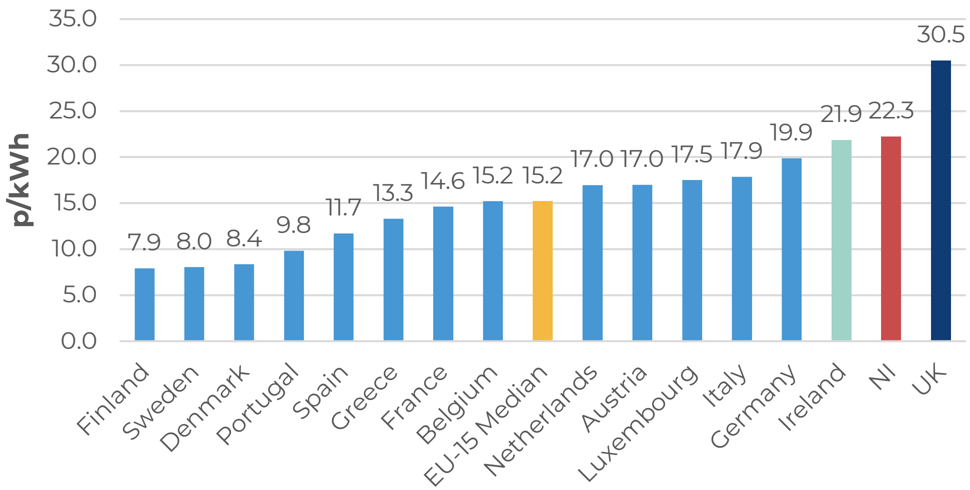


Figure 22: Small/Medium I&C connections unit prices incl. all taxes (July - December 2024)

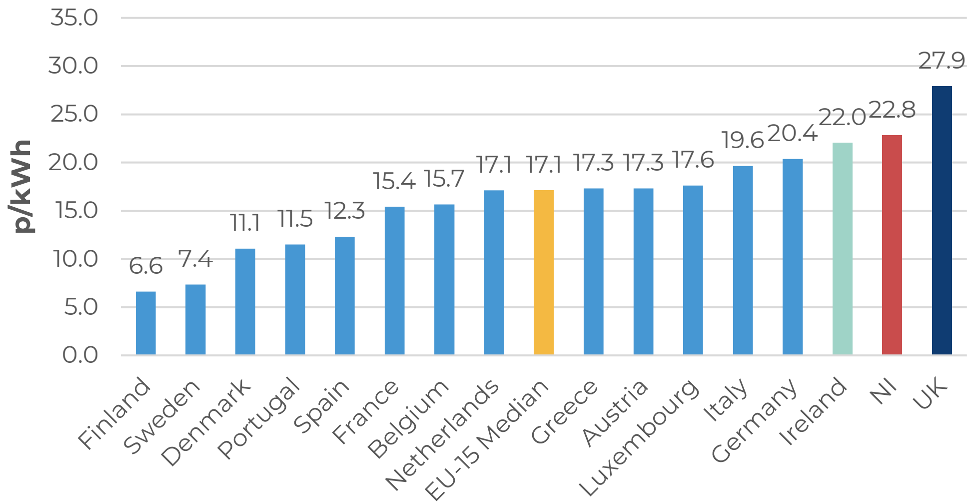


Figure 23: Medium I&C connections unit prices incl. all taxes (January - June 2024)

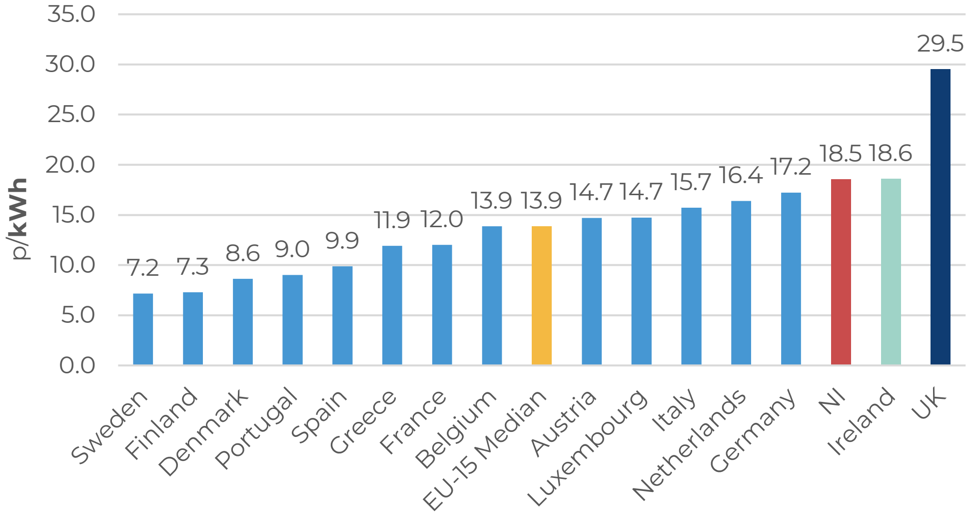
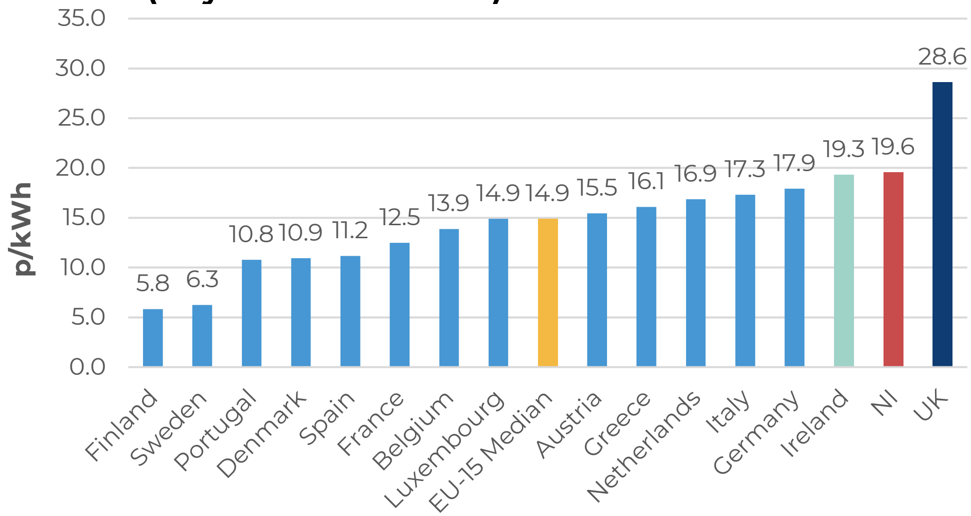


Figure 24: Medium I&C connections unit prices incl. all taxes (July - December 2024)



Data source: NI electricity suppliers, DESNZ, Eurostat and UR internal calculations

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Figure 25: Large + Very Large I&C connections unit prices incl. all taxes (January - June 2024)

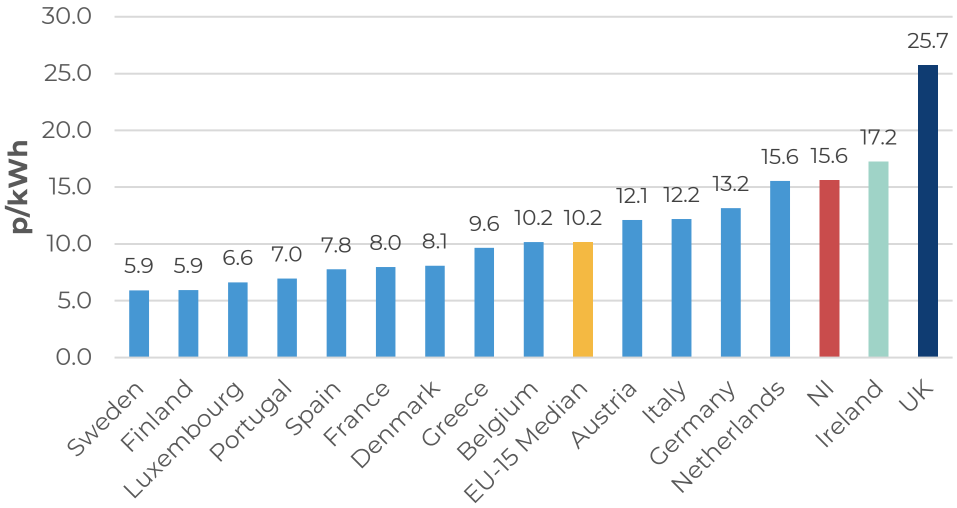
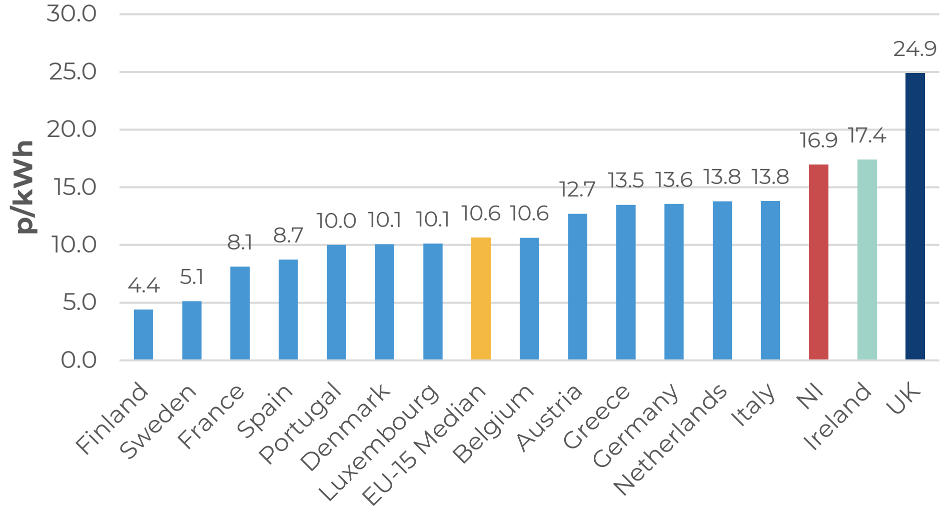


Figure 26: Large + Very Large I&C connections unit prices incl. all taxes (July - December 2024)



Data source: NI electricity suppliers, DESNZ, Eurostat and UR internal calculations

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4.8 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 27: Small I&C connections - unit price over time[15]

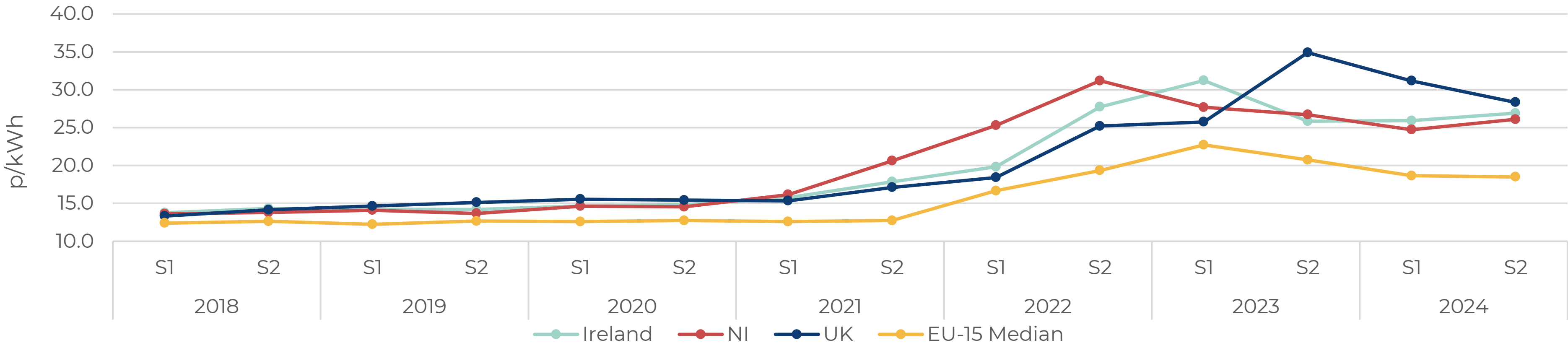
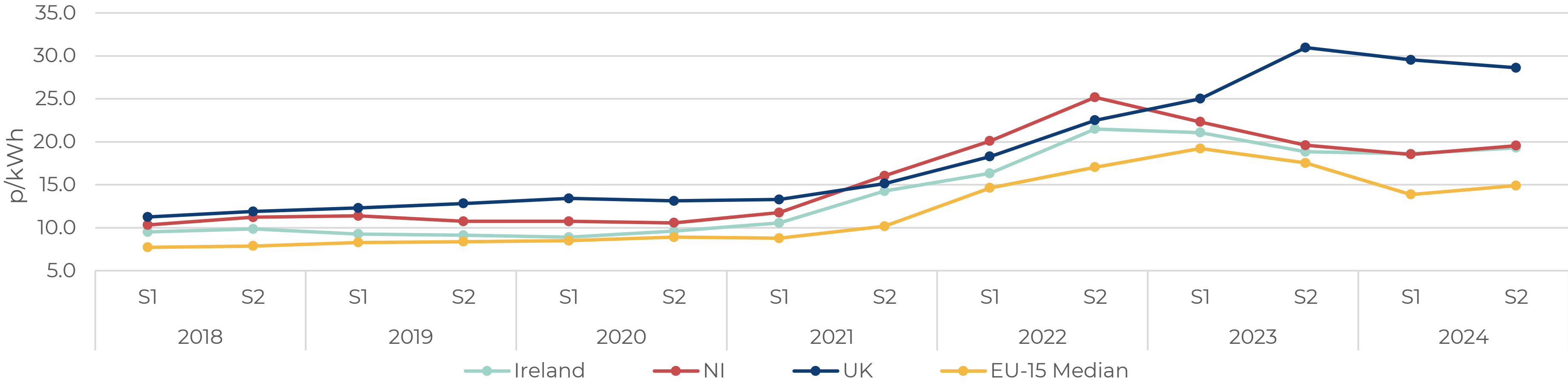


Figure 28: Medium I&C connections - unit price over time



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

[15] UK data published revised data for UK 2024 S1

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5. Electricity supplier complaints

This section of the report provides readers with information in relation to electricity supplier complaints collated in 2024. The definition of a complaint is outlined in our Code of Practice minimum standards on Complaints Handling[16]. The complaints data is provided by electricity suppliers as per the REMM framework. The Consumer Council for Northern Ireland (CCNI) report on customer complaints[17].

Total supplier Complaints

5.1 The table below shows the total number of complaints received by suppliers during 2024, 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 2024 for all customers. The total number of electricity complaints has decreased slightly from 30,957 in 2023 to 30,672 in 2024.

5.2 **Table 13: 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	8,377	968	9,345
Customer Service	6,059	446	6,505
Debt issues, disconnections and reconnections	471	187	658
Network Company related	903	87	990
Prepayment meter issues	4,222	3	4,225
Selling/marketing - doorstep and face-to-face	338	10	348
Selling/marketing - other	4,942	32	4,974
Switching	1,299	76	1,375
Tariffs	1,582	187	1,769
Other	416	67	483
Total	**28,609**	**2,063**	**30,672**

Source: NI electricity suppliers

[16] 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).
[17] CCNI have a statutory duty to deal with customer complaints which they publish each year: CCNI Annual Complaints and Communication Report 2023-24

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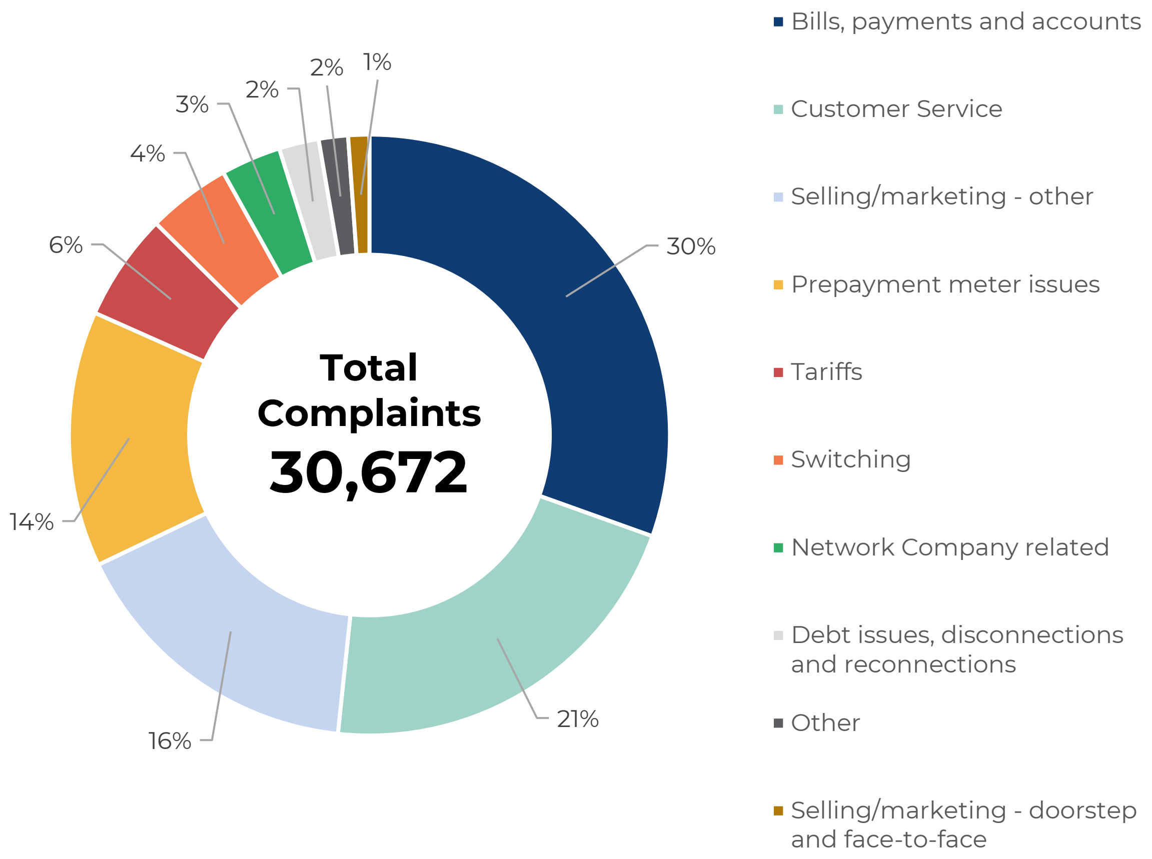
5.3 The three most common electricity supplier complaints made during 2024 related to: bills, payments and accounts (30%), customer service (21%), and selling/marketing – other (16%). While similar to the complaints profile for 2023 (although percentages vary) selling and marketing-other complaints has replaced prepayment meter complaints in third place.

Figure 29: Total electricity complaints by type



Source: NI electricity suppliers

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6. Gas

Gas 2024

Total Gas Connections

334,523

Total Gas Consumption

7,123,796 MWh

West
Connections
4,664

Consumption
832,209 MWh

G. Belfast
Connections
256,187

Consumption
4,336,610 MWh

Ten Towns
Connections
73,042

Consumption
1,954,977 MWh

Total Gas Complaints

63,896

Domestic Gas Pricing

11.0 p/kWh
January - June 2024

9.9 p/kWh
July - December 2024

Total Gas Switches

2,304

Total gas NI market share by connections

6.1 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[18] are as at the **end of December 2024.**

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

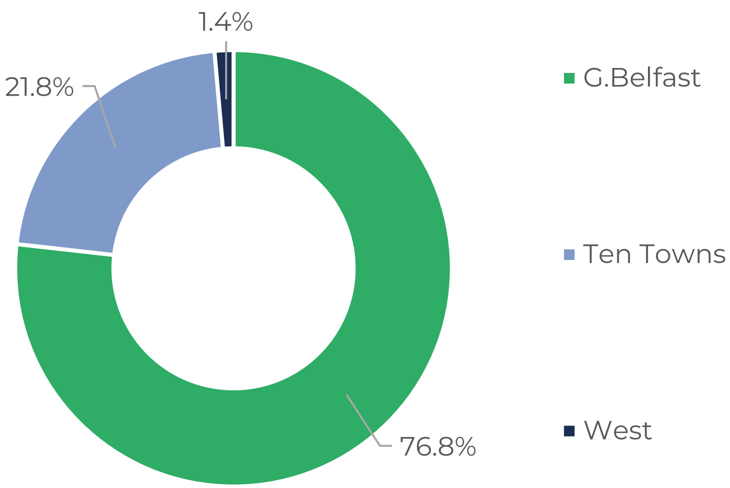

Figure 31: Gas market share by supplier by connections

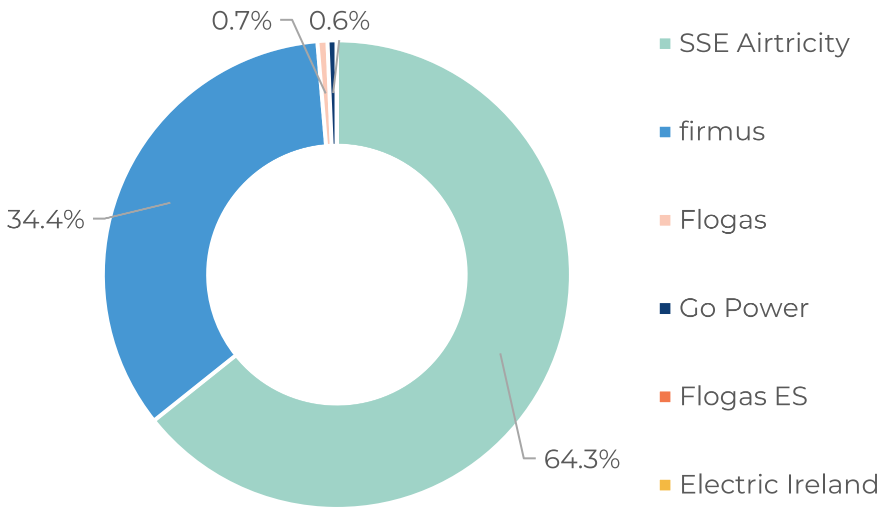

Table 14: Gas market share by connections

Distribution License Area	Market Segment	SSE Airtricity	firmus	Flogas	Go Power	Flogas ES	Electric Ireland	Total Connections
G.Belfast	**Domestic Only**	204,744	40,379	6	7	0	0	245,136
G.Belfast	**I&C Only**	5,678	2,638	1,691	1,648	19	7	11,681
Ten Towns	**Domestic Only**	0	69,923	0	0	0	0	69,923
Ten Towns	**I&C Only**	80	2,008	583	436	6	6	3,119
West	**Domestic Only**	4,538	0	0	0	0	0	4,538
West	**I&C Only**	21	59	27	17	0	2	126
Total		**215,061**	**115,007**	**2,307**	**2,108**	**25**	**15**	**334,523**

Data source: PNGL / FeDL / Evolve

[18] 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.

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Total gas NI market share by consumption

6.2 The pie chart below shows the total gas consumption in NI for the period **January to December 2024**, with a breakdown by distribution area. Total consumption for the period was **7,123,796 MWh.**

Figure 32: Gas market share by distribution license area by consumption

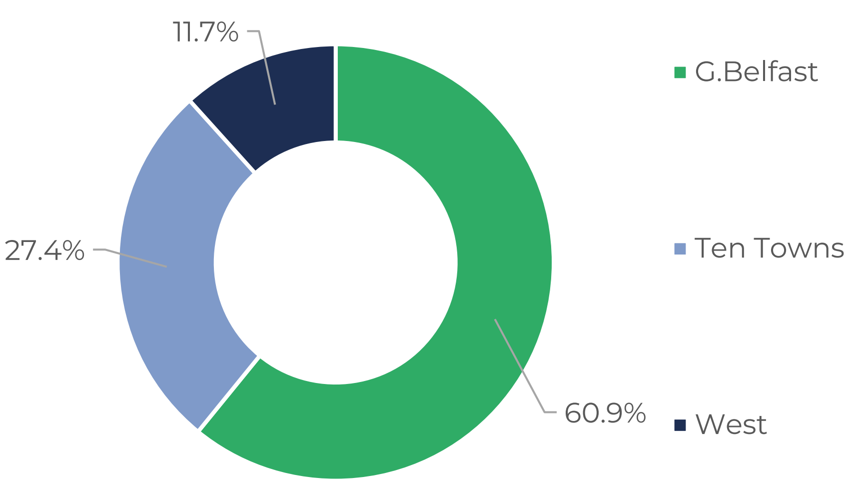

Figure 33: Gas market share by supplier by consumption

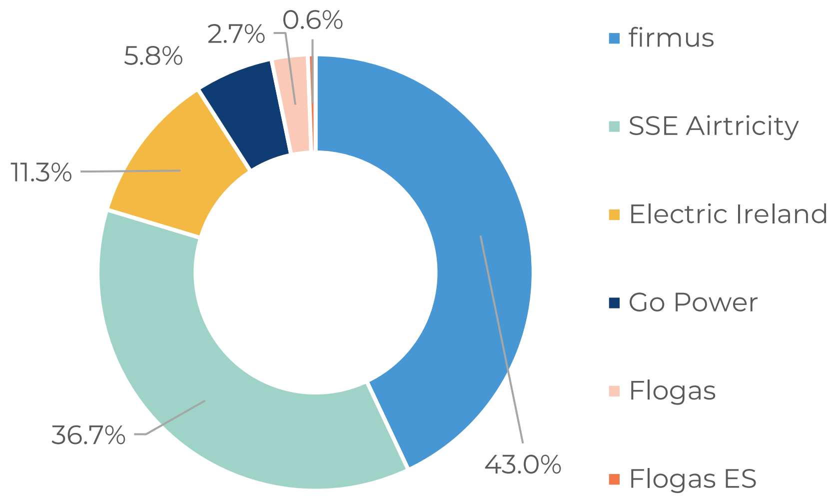

Table 15: Gas market share by consumption (MWh)

Distribution Licensed Area	SSE Airtricity	firmus	Electric Ireland	Go Power	Flogas	Flogas ES	Total Consumption
G.Belfast	2,339,752	1,359,876	181,701	298,632	129,434	27,215	4,336,610
Ten Towns	155,716	1,493,960	126,123	112,486	53,584	13,109	1,954,977
West	116,105	209,171	494,379	4,414	8,139	0	832,209
Total	**2,611,573**	**3,063,008**	**802,203**	**415,531**	**191,157**	**40,324**	**7,123,796**

Data source: PNGL / FeDL / Evolve

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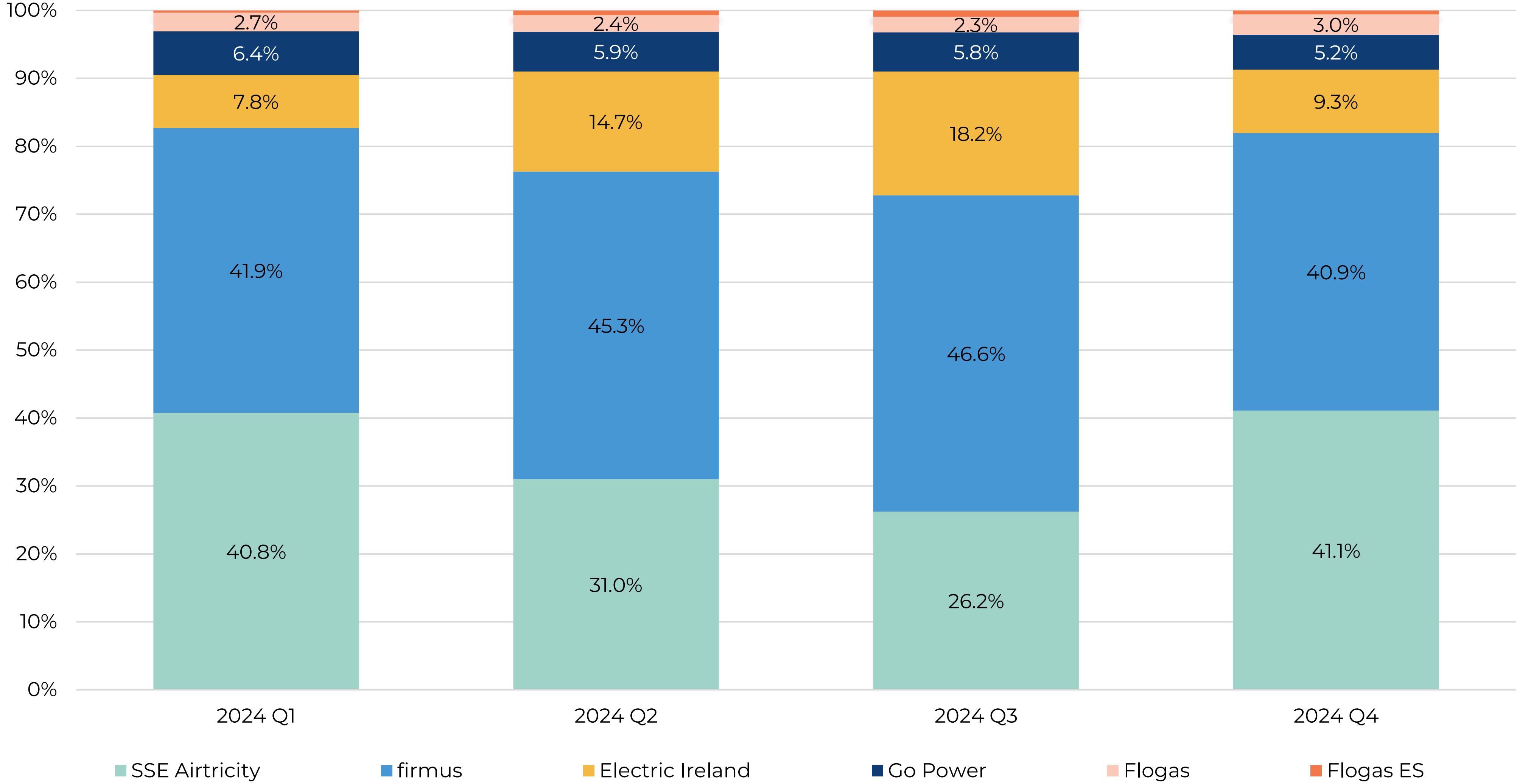
6.3 The bar chart below shows the trends in the market shares (by consumption) for each active domestic and I&C supplier in NI for the four quarters of 2024.

Figure 34: Gas market share by consumption over time - total NI market



Data source: PNGL / FeDL / Evolve

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Domestic and small I&C analysis by connections

6.4 This section of the report provides a more detailed analysis of the gas **domestic and small I&C sector**[19]**,** by connections as at the end of December 2024.

Figure 35: Domestic and small I&C market shares by connections

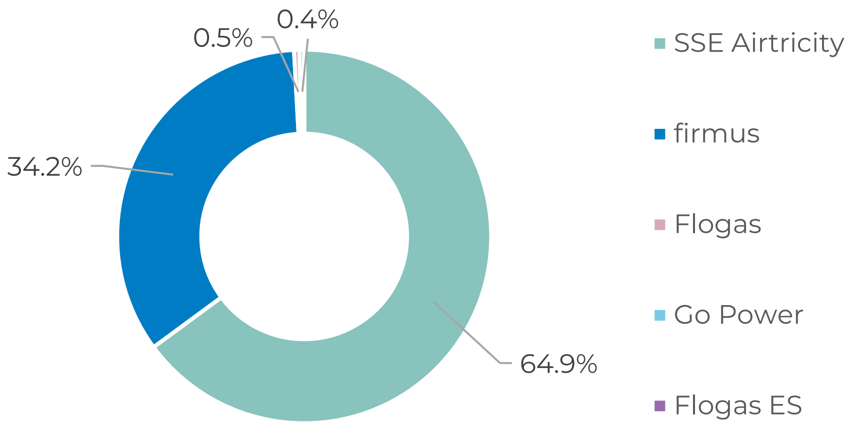

Figure 36: Domestic and small I&C connections by market segment

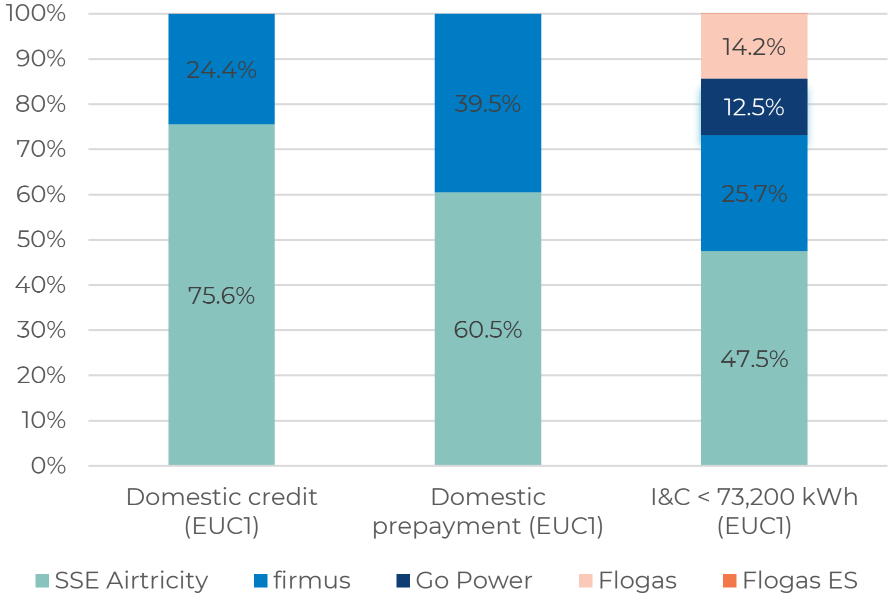

Table 16: Domestic and small I&C analysis by connections

Distribution Licensed Area	Market Segment	SSE Airtricity	firmus	Flogas	Go Power	Flogas ES	Total Connections
G.Belfast	**Domestic credit (EUC1)**	78,631	10,553	6	7	0	89,197
G.Belfast	**Domestic prepayment (EUC1)**	126,113	29,826	0	0	0	155,939
G.Belfast	**I&C < 73,200 kWh (EUC1)**	5,024	1,454	1,117	1,065	8	8,668
Ten Towns	**Domestic credit (EUC1)**	0	15,278	0	0	0	15,278
Ten Towns	**Domestic prepayment (EUC1)**	0	54,645	0	0	0	54,645
Ten Towns	**I&C < 73,200 kWh (EUC1)**	10	1,254	382	252	0	1,898
West	**Domestic credit (EUC1)**	1,307	0	0	0	0	1,307
West	**Domestic prepayment (EUC1)**	3,231	0	0	0	0	3,231
West	**I&C < 73,200 kWh (EUC1)**	16	21	16	13	0	66
Total		**214,332**	**113,031**	**1,521**	**1,337**	**8**	**330,229**

Data sources: PNGL / FeDL / Evolve

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

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Medium and large I&C analysis by connections

6.5 This section is new to the AREMM report and provides a more detailed analysis of the gas **medium and large I&C sector,** by connections as at the end of December 2024.

Figure 37: Medium & Large I&C Market Shares by Connections

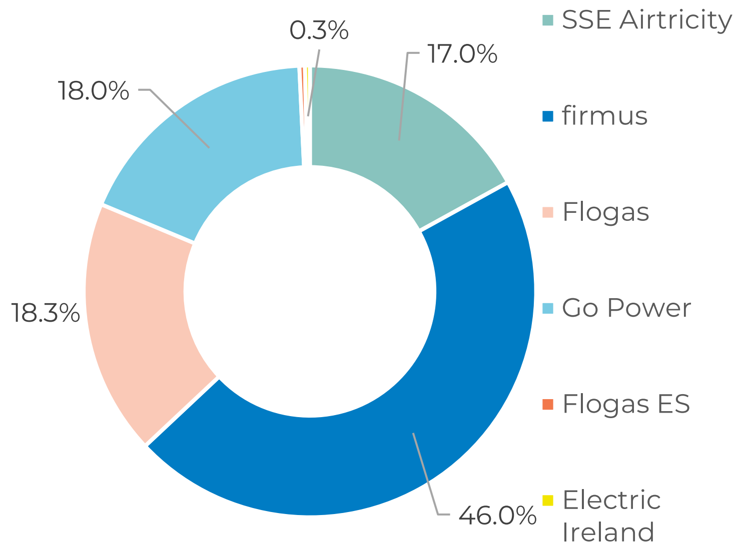

Figure 38: Medium & Large I&C Connections by Market Segment

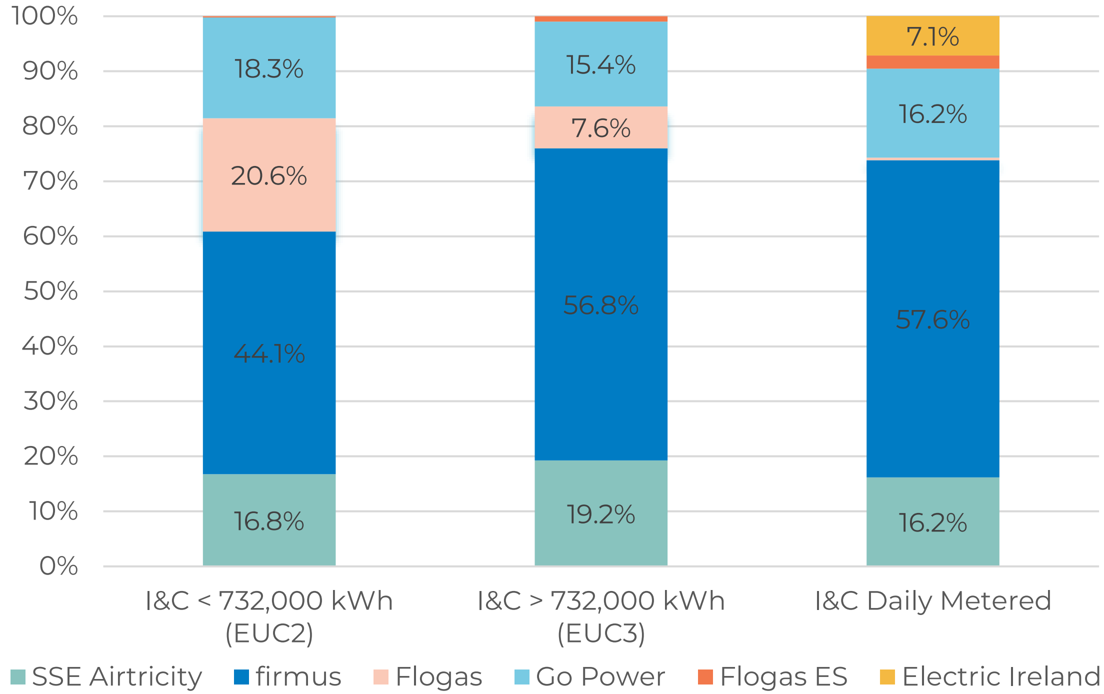

Table 17: Medium & Large I&C analysis (by connections)

Market Segment	SSE Airtricity	firmus	Flogas	Go Power	Flogas ES	Electric Ireland	Total Connections
I&C < 732,000 kWh (EUC2)	614	1,616	753	672	8	0	3,663
I&C > 732,000 kWh (EUC3)	81	239	32	65	4	0	421
I&C Daily Metered	34	121	1	34	5	15	210
Total	**729**	**1,976**	**786**	**771**	**17**	**15**	**4,294**

Data sources: PNGL / FeDL / Evolve

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Domestic and small I&C analysis by consumption

6.6 This section is new to the AREMM report and provides a more detailed analysis of the gas **domestic and small I&C sector,** by consumption as at the end of December 2024.

Figure 39: Domestic & small I&C market share by consumption

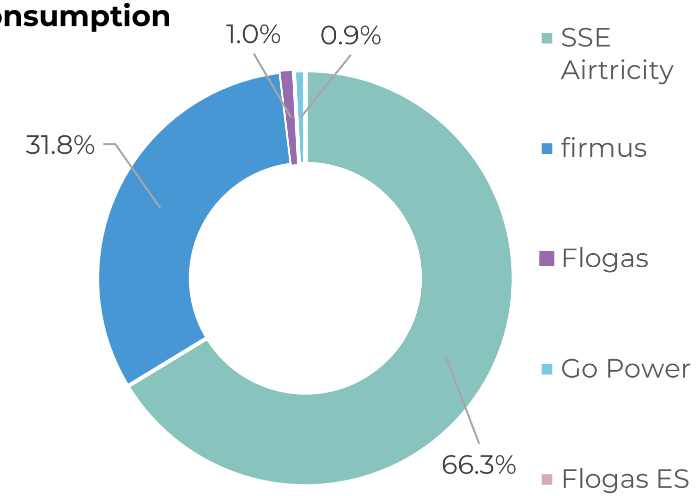

Figure 40: Domestic and small I&C market share by market segment and consumption

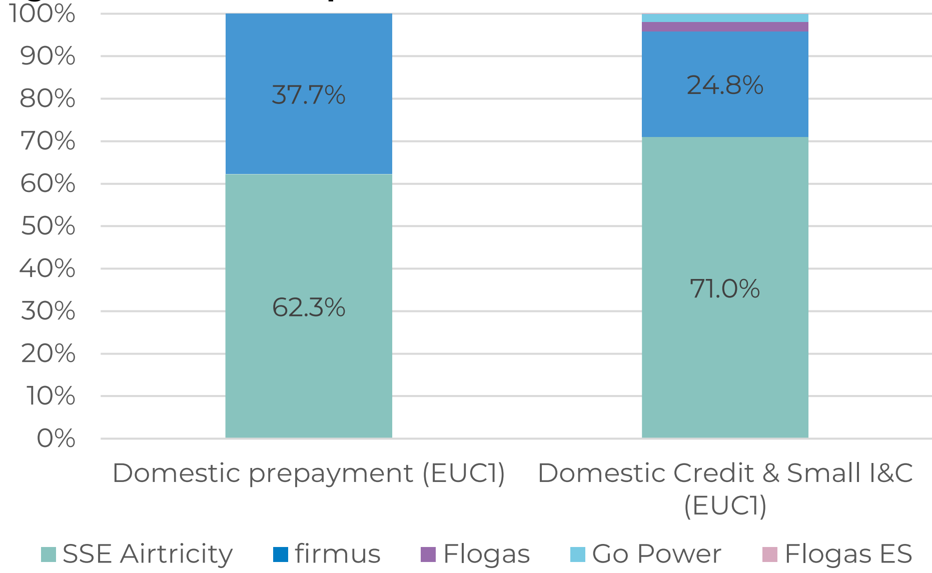

Table 18: Domestic and small I&C analysis by consumption (MWh)

Distribution Licensed Area	Market Segment	SSE Airtricity	firmus	Flogas	Go Power	Flogas ES	Total Consumption
G.Belfast	Domestic prepayment (EUC1)	1,021,489	219,110	0	0	0	1,240,599
G.Belfast	Domestic Credit & Small I&C (EUC1)	1,013,724	166,948	23,203	21,741	141	1,225,757
Ten Towns	Domestic prepayment (EUC1)	0	416,476	0	0	0	416,476
Ten Towns	Domestic Credit & Small I&C (EUC1)	116	191,576	8,943	5,660	0	206,295
West	Domestic prepayment (EUC1)	26,674	0	0	0	0	26,674
West	Domestic Credit & Small I&C (EUC1)	13,223	852	207	86	0	14,367
Total		**2,075,225**	**994,962**	**32,352**	**27,487**	**141**	**3,130,168**

Data sources: PNGL / FeDL / Evolve

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Medium and large I&C analysis by consumption

6.7 This section of the report provides a more detailed analysis of the gas **medium and large I&C sector**[20], by consumption for the period January to December 2024.

Figure 41: Medium and large I&C market share by consumption

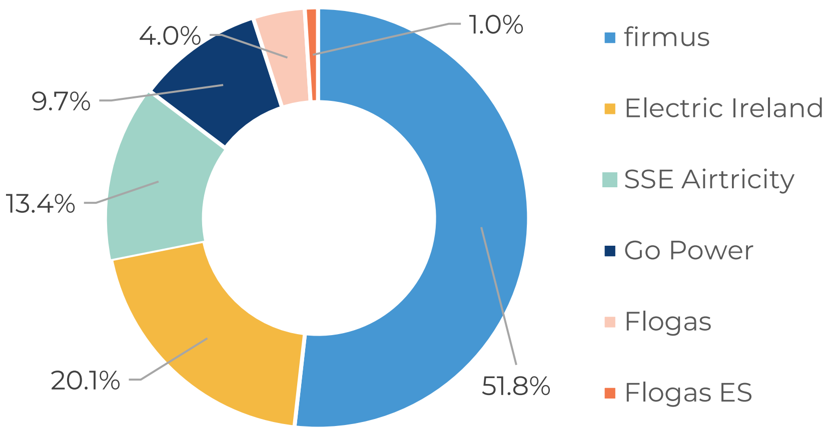

Figure 42: Medium and large I&C market share by market segment and consumption

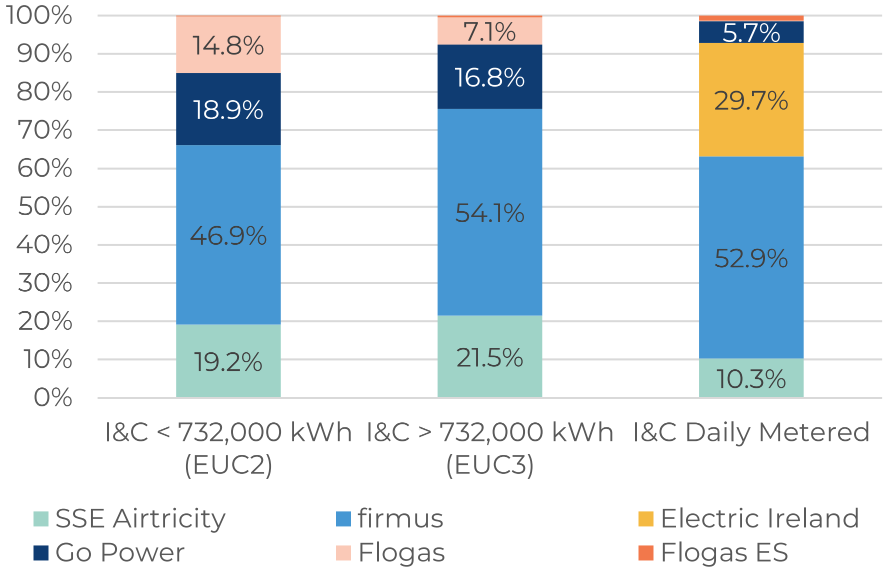

Table 19: Medium and large I&C analysis by consumption (MWh)

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)	147,486	219,605	85,602	111,943	1,422	42	566,100
G.Belfast	I&C > 732,000 kWh (EUC3)	66,999	146,537	20,630	57,097	344	0	291,607
G.Belfast	I&C Daily Metered	90,054	607,676	0	107,850	25,308	181,659	1,012,547
Ten Towns	I&C < 732,000 kWh (EUC2)	9,252	158,943	34,061	41,369	326	0	243,951
Ten Towns	I&C > 732,000 kWh (EUC3)	33,603	103,181	10,579	21,844	1,916	0	171,123
Ten Towns	I&C Daily Metered	112,745	623,785	0	43,612	10,867	126,123	917,133
West	I&C < 732,000 kWh (EUC2)	373	4,697	1,527	1,219	0	0	7,816
West	I&C > 732,000 kWh (EUC3)	1,404	6,571	2,435	871	0	0	11,280
West	I&C Daily Metered	74,431	197,051	3,971	2,239	0	494,379	772,071
Total		**536,347**	**2,068,046**	**158,805**	**388,044**	**40,182**	**802,203**	**3,993,628**

Data sources: PNGL / FeDL / Evolve

[20] 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.

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Gas – new domestic and I&C connections

6.8 This section of the report provides an analysis of the gas new I&C connections, by distribution area and for the four quarters of 2024.

Figure 43: New domestic connections

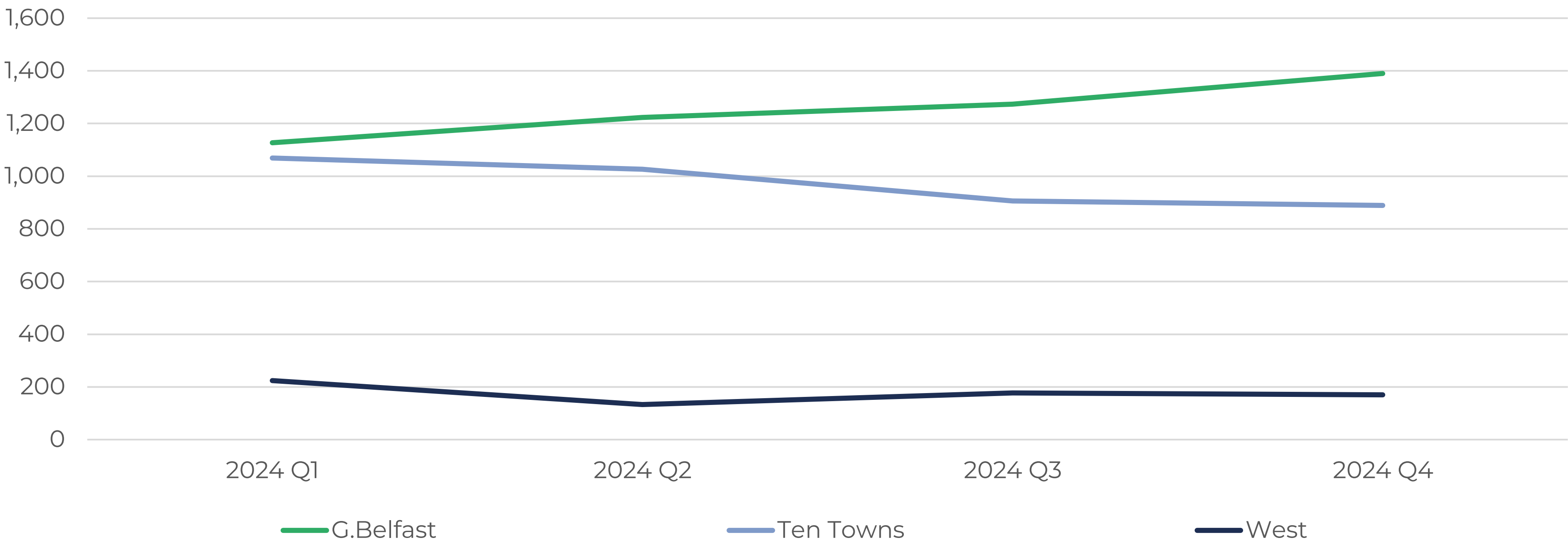

Table 20: Number of new domestic connections

Distribution Licensed Area	2024 Q1	2024 Q2	2024 Q3	2024 Q4	Total
Greater Belfast	1,127	1,223	1,274	1,390	5,014
Ten Towns	1,069	1,026	906	889	3,890
West	224	133	177	170	704
Total	**2,420**	**2,382**	**2,357**	**2,449**	**9,608**

Data source: PNGL / FeDL / Evolve

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Gas – new I&C connections

6.9 This section of the report provides an analysis of the gas new I&C connections, by distribution area and for the four quarters of 2024.

Figure 44: New I&C connections

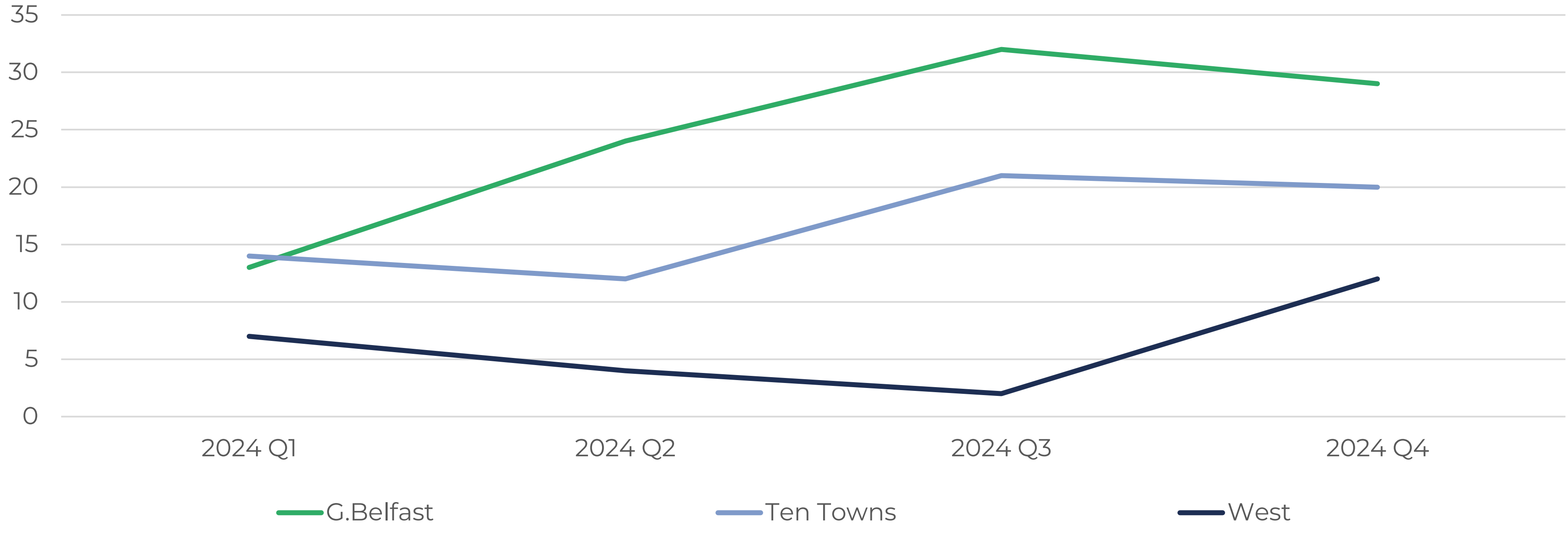

Table 21: Number of new I&C connections

Distribution Licensed Area	2024 Q1	2024 Q2	2024 Q3	2024 Q4	Total
Greater Belfast	13	24	32	29	98
Ten Towns	14	12	21	20	67
West	7	4	2	12	25
Total	**34**	**40**	**55**	**61**	**190**

Data source: PNGL / FeDL / Evolve

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Market activity - switching

6.10 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[21] for each quarter of 2024. There was a total of 2,304 gas switches in 2024, which is a significant decrease from 5,113 in the previous year.

Figure 45: Gas - quarterly total change of supplier

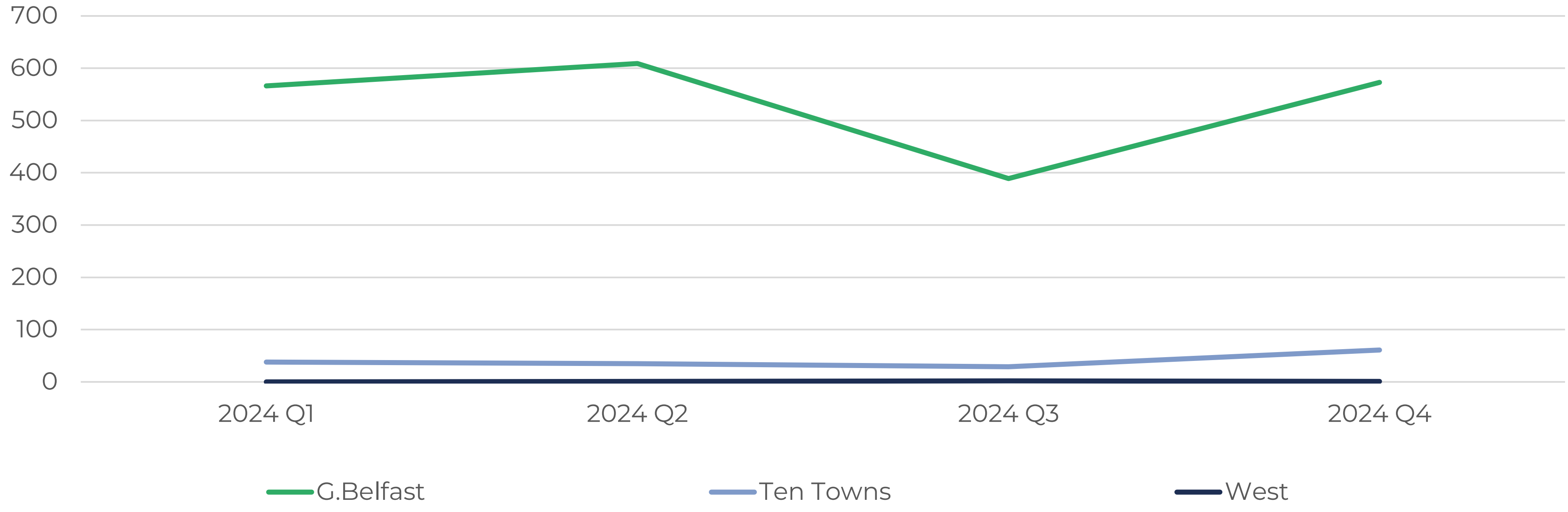

Table 22: Gas -switching rate – total NI market

Quarter	2024 Q1	2024 Q2	2024 Q3	2024 Q4	Total
No. of switches	604	645	420	635	2,304
Switching rate (%)	0.2%	0.2%	0.1%	0.2%	0.7%

Data source: PNGL / FeDL / Evolve

[21] 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.

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6.11 Greater Belfast is the only distribution area in which there is competition within the domestic credit and prepayment[22] sectors. The Figure below reflects the monthly change of customer numbers (gains), per market segment within the domestic sector. The table shows the total domestic switches and switching rate for each quarter of 2024. The total number of gas domestic switches in 2024 was 1,561 which is a significant decrease from 4,277 in the previous year.

Figure 46: Gas - monthly domestic switches (G. Belfast)

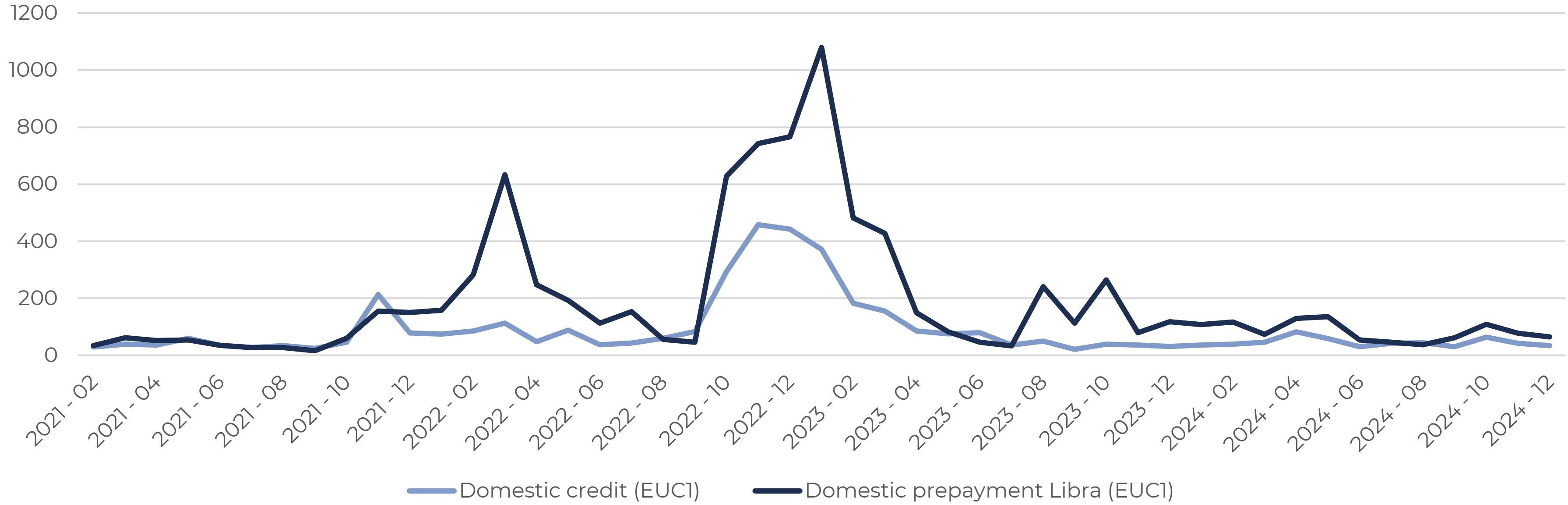

Table 23: Gas - switching rate - domestic market (G. Belfast only)

Quarter	2024 Q1	2024 Q2	2024 Q3	2024 Q4	Total
No. of switches	419	490	261	391	1,561
Switching rate (%)	0.2%	0.2%	0.1%	0.2%	0.6%

Data source: PNGL

[22] 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.

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6.12 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 2024. The total number of gas I&C switches in 2024 was 743, a decrease from 836 in the previous year.

Figure 47: Gas I&C switches by distribution licensed area

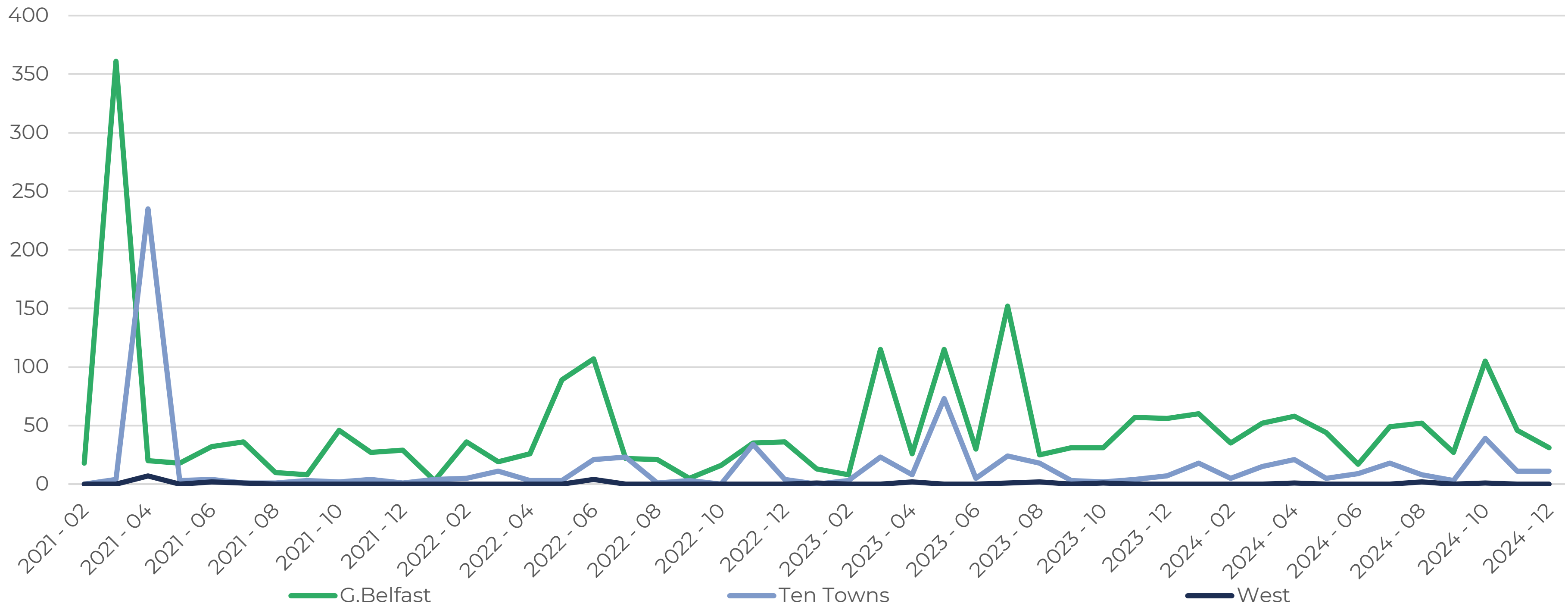

Table 24: Gas - switching rate – I&C market

Quarter	2024 Q1	2024 Q2	2024 Q3	2024 Q4	Total
No. of switches	185	155	159	244	743
Switching rate (%)	1.2%	1.0%	1.1%	1.6%	5.0%

Data source: PNGL / FeDL /Evolve

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Gas - Sticky customers

6.13 This is a newly published metric and is published here in the 2024 AREMM for the first time. Within the REMM framework[23] sticky customers are those who have never switched. Below we show domestic and I&C information separately. As Greater Belfast is the only distribution area in which there is competition within the domestic credit and prepayment sectors only Greater Belfast information is presented for domestic sticky customers.

Table 25: Domestic sticky customers by connection (Greater Belfast Area only)

Market Activity	Domestic Connections	%
Never Switched	140,514	57%
Switched 3+ years ago	41,705	17%
Switched in last 3 years	62,917	26%
Total	**245,136**	**100%**

Figure 48: Domestic sticky customers as percentage of total domestic connections (Greater Belfast Area only)

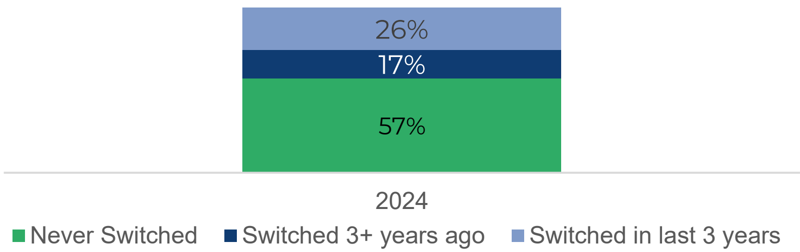
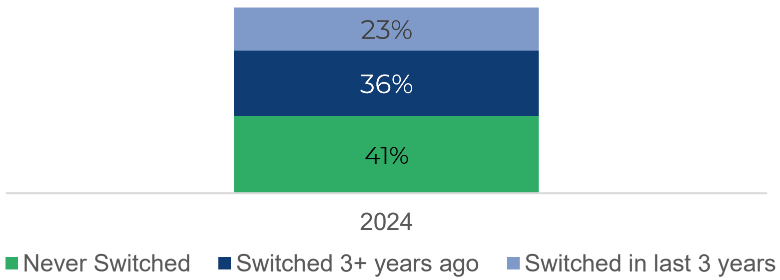


Table 26: I&C sticky customers by connection

Market Activity	I&C Connections	%
Never Switched	6,193	41%
Switched 3+ years ago	5,299	36%
Switched in last 3 years	3,434	23%
Total	**14,926**	**100%**

Figure 49: I&C sticky customers as percentage of total I&C connections



Data source: PNGL/ FeDL /Evolve

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[23] 2015 REMM Framework.pdf

7. Gas pricing – 2024[24]

Domestic gas prices[25]

7.1 The pricing data detailed in this Annual REMM report provides a comparison for the period January – June 2024 (semester 1) and July – December 2024 (semester 2).

7.2 The pricing data detailed in this report is for 2024. 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.

7.3 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 2024, the NI domestic gas prices were comparable to Ireland and higher than the UK and EU median. In semester 2, the NI domestic gas price was lower than Ireland and the EU median but higher than the UK.

Figure 50: Medium domestic connections unit prices incl. all Taxes (January - June 2024)

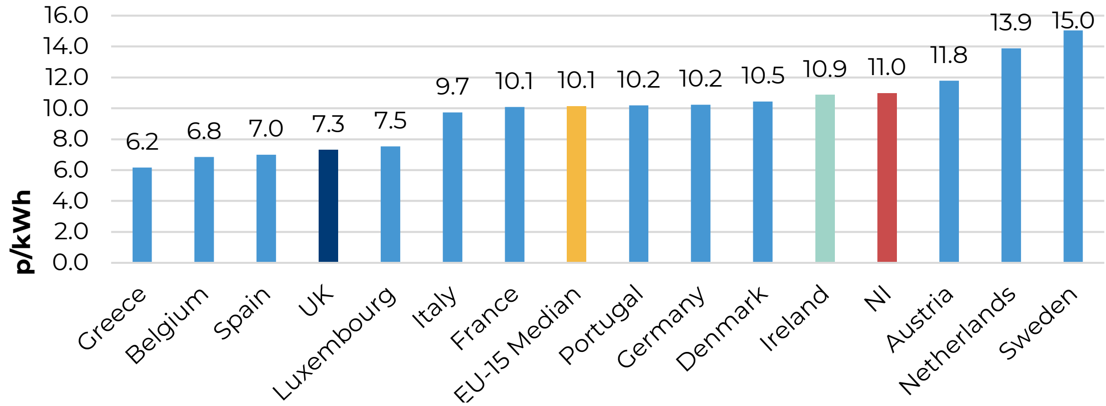
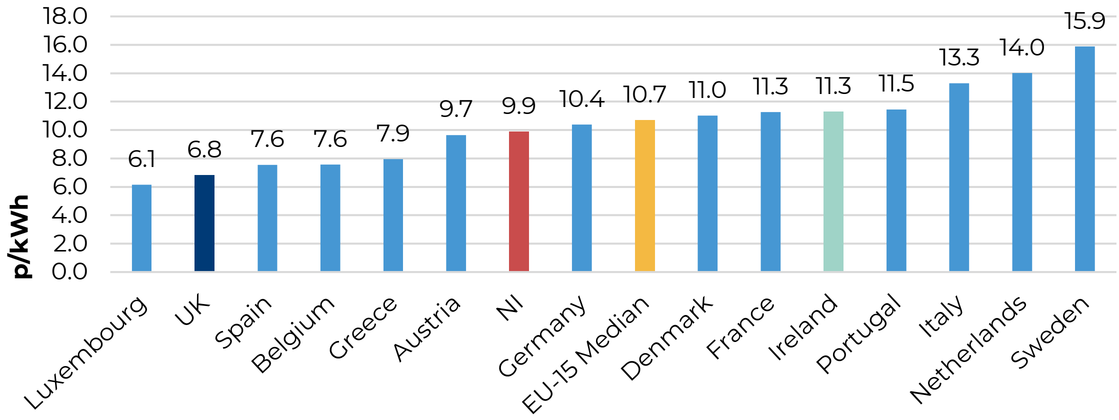


Figure 51: Medium domestic connections unit prices incl. all Taxes (July - December 2024)



Data source: Eurostat, DESNZ and NI gas suppliers collated by UR

[24] Pricing data within the AREMM (and also within our Quarterly reports): the unit prices provided include an average of all the tariffs offered by all suppliers, which could include 30+ from one supplier. When we publish comparison information within the regulated supplier tariff announcements, we use the standard domestic tariff. In addition, comparison dates will also need to be considered – for example the AREMM contains 2024 pricing data, whereas our most recent comparison included in the latest tariff reviews is correct from 1 October 2025.

[25] 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.

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

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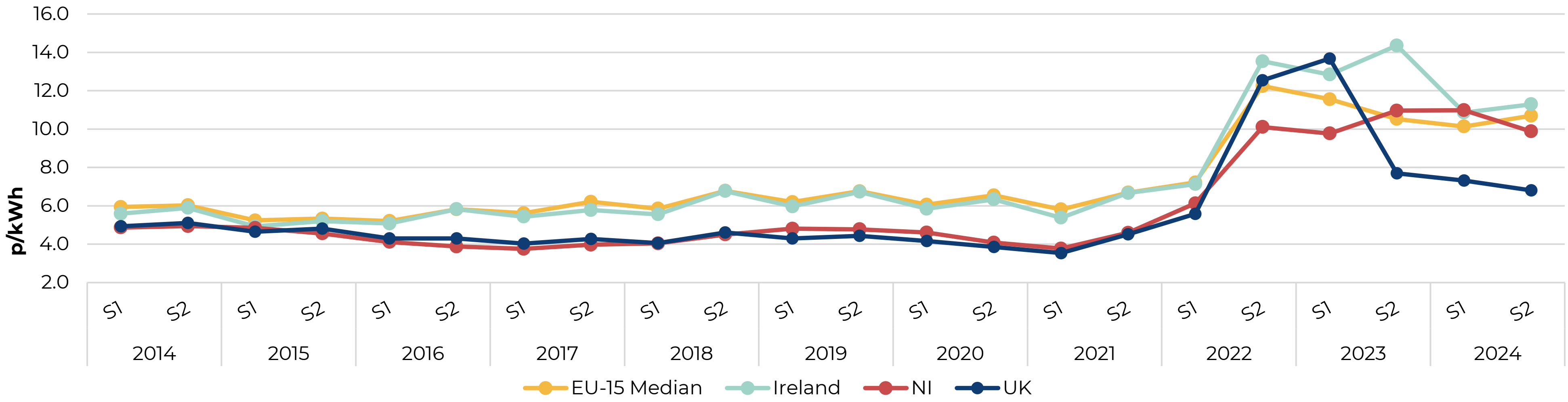
7.5 The graph below shows the medium domestic connections unit price (inc all taxes) over the last eleven years compared to the EU median, UK and Ireland.

Figure 52: Medium domestic connections unit prices incl. all Taxes – Unit price over time



Data source: Eurostat, DESNZ and NI gas suppliers collated by UR

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Domestic historical regulated maximum average price

7.6 During 2024, there have been a number of decreases to the regulated tariff within the Greater Belfast, Ten Towns and West areas. Further details on these regulated tariffs are available in the UR tariff review briefing papers.

7.7 Firmus energy regulated tariffs have decreased during 2024 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.

7.8 SSE Airtricity gas regulated tariff decreased during 2024 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 53: firmus energy historical regulated maximum average price (p/therm)

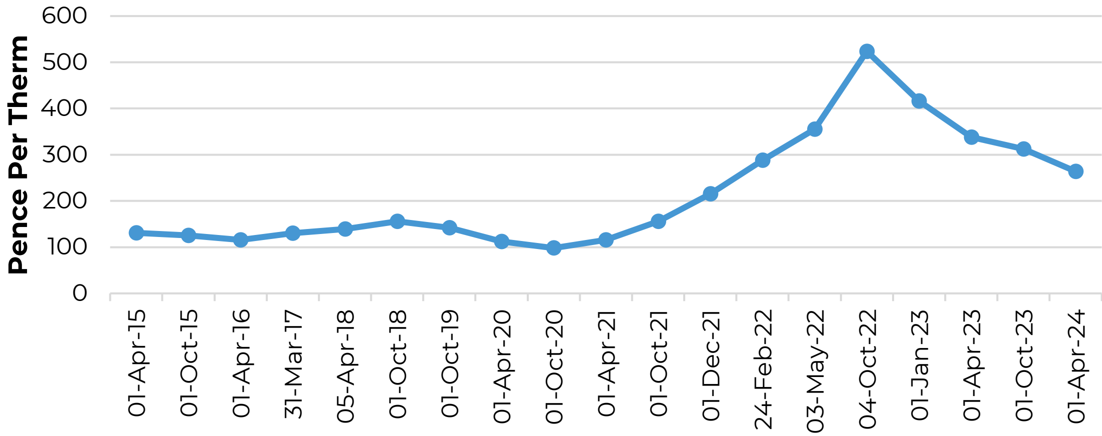
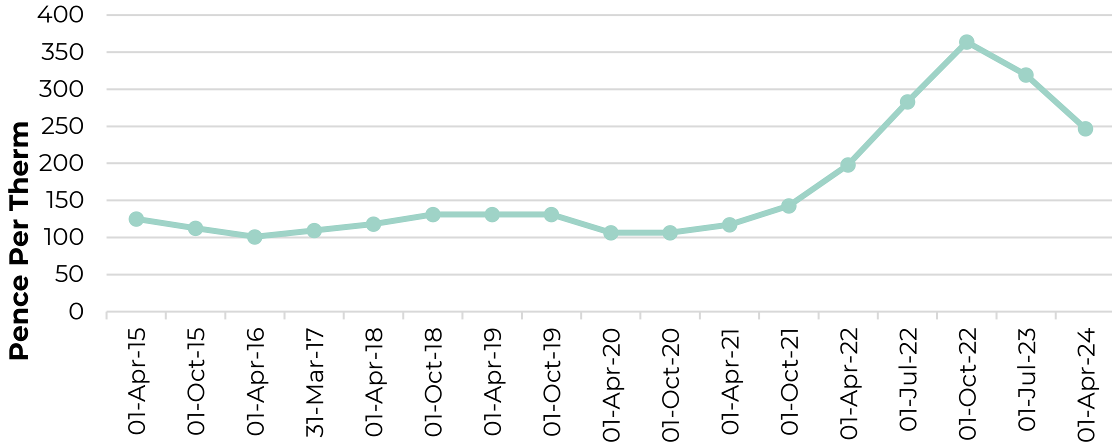


Figure 54: SSE Airtricity historical regulated maximum average price (p/therm)



Data source: [UR gas regulated tariff briefing]

I&C gas prices

7.9 **<u>I&C price</u> comparison with EU**: The graphs below show I&C gas prices. Similar to the electricity prices above they 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 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.

7.10 During semester 1 2024 (January - June), the NI prices in the very small I&C category were below the EU median, 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 above the UK, Ireland and EU median.

7.11 During semester 2 2024 (July - December), the NI prices in the very small I&C category were below the UK and above the EU median 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 above the UK, Ireland and EU Median.

Figure 55: Very small connections prices excl. VAT, incl. other taxes (January – June 2024)

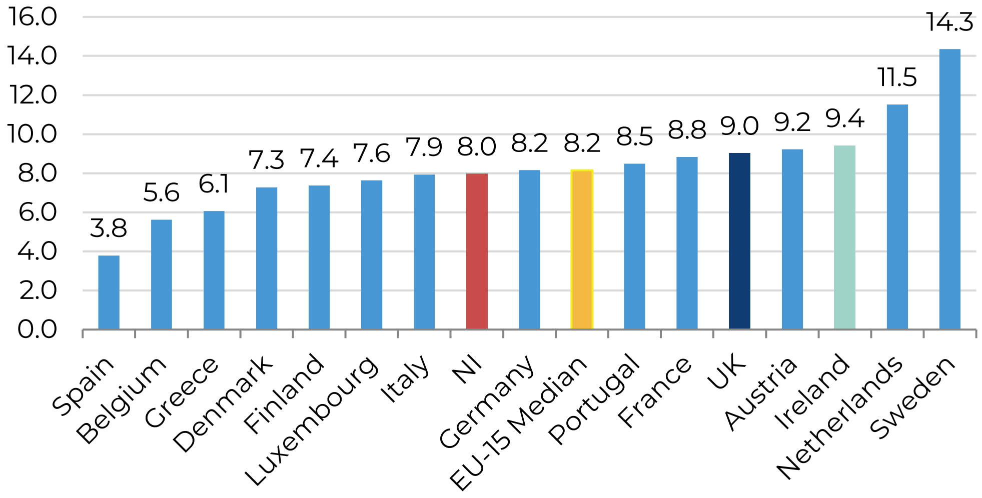
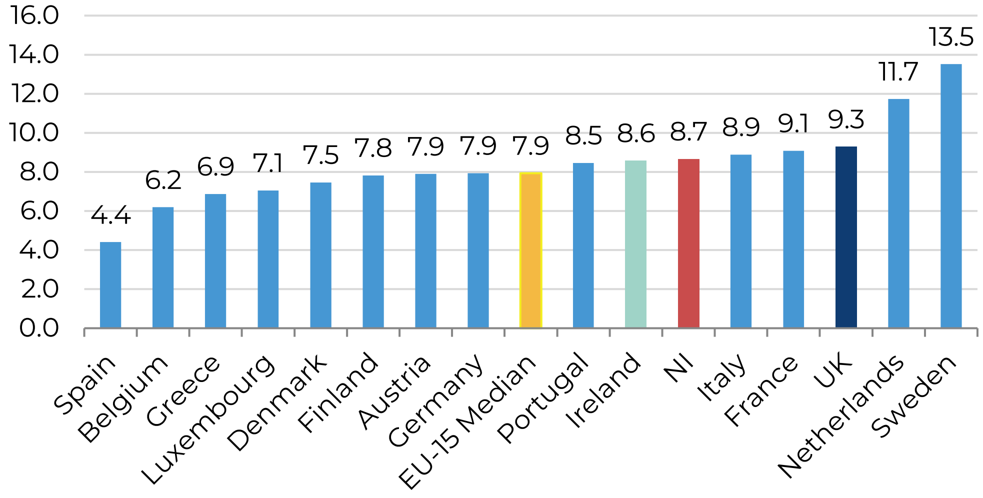


Figure 56: Very small connections prices excl. VAT, incl. other taxes (July – December 2024)



Data source: Eurostat, DESNZ and NI gas suppliers collated by UR

*The prices data for medium and large connections for Sweden, Luxembourg, and Greece was categorised as “confidential” on Eurostat for Semester 2 2024

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Figure 57: Small connections prices excl. VAT, incl. other taxes (January – June 2024)

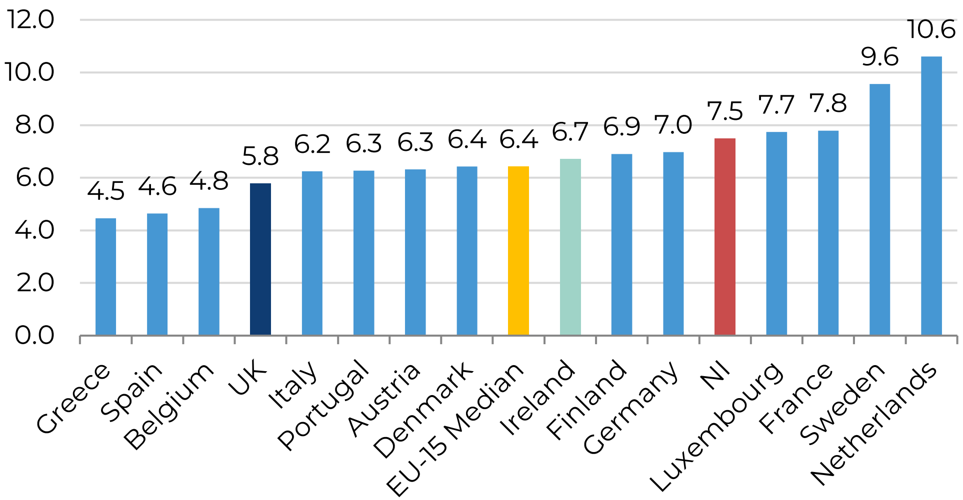


Figure 58: Small connections prices excl. VAT, incl. other taxes (July – December 2024)

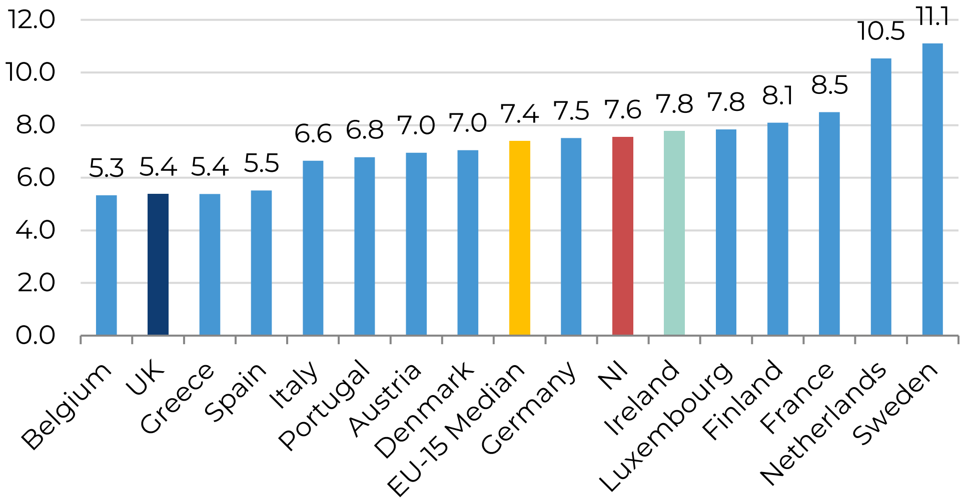


Figure 59: Medium & Large connections prices* excl. VAT, incl. other taxes (January – June 2024)

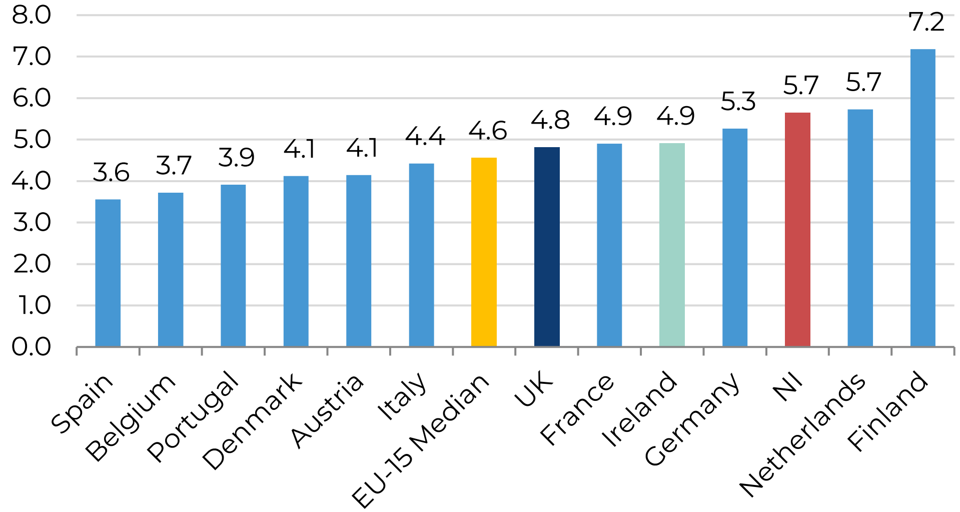
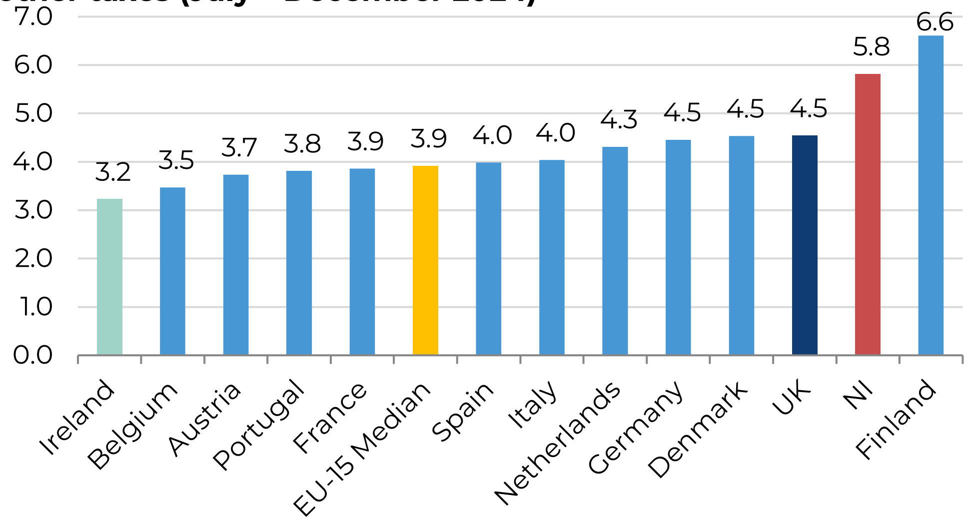


Figure 60: Medium & Large connections prices* excl. VAT, incl. other taxes (July – December 2024)



Data source: Eurostat, DESNZ and NI gas suppliers collated by UR

*The prices data for medium and large connections for Sweden, Luxembourg, and Greece was categorised as “confidential” on Eurostat for Semester 2 2024

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8. Gas supplier complaints

8.1 This section of the report provides readers with information in relation to gas supplier complaints collated in 2024. The definition of a complaint is outlined in our Code of Practice minimum standards on Complaints Handling[26]. The complaints data is provided by gas suppliers as per the REMM framework.

Total supplier complaints

8.2 The table below shows the total number of complaints received by suppliers during 2024, 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 2024 for all customers. The total number of gas complaints in 2024 was 63,896, an increase from 59,755 in 2023.

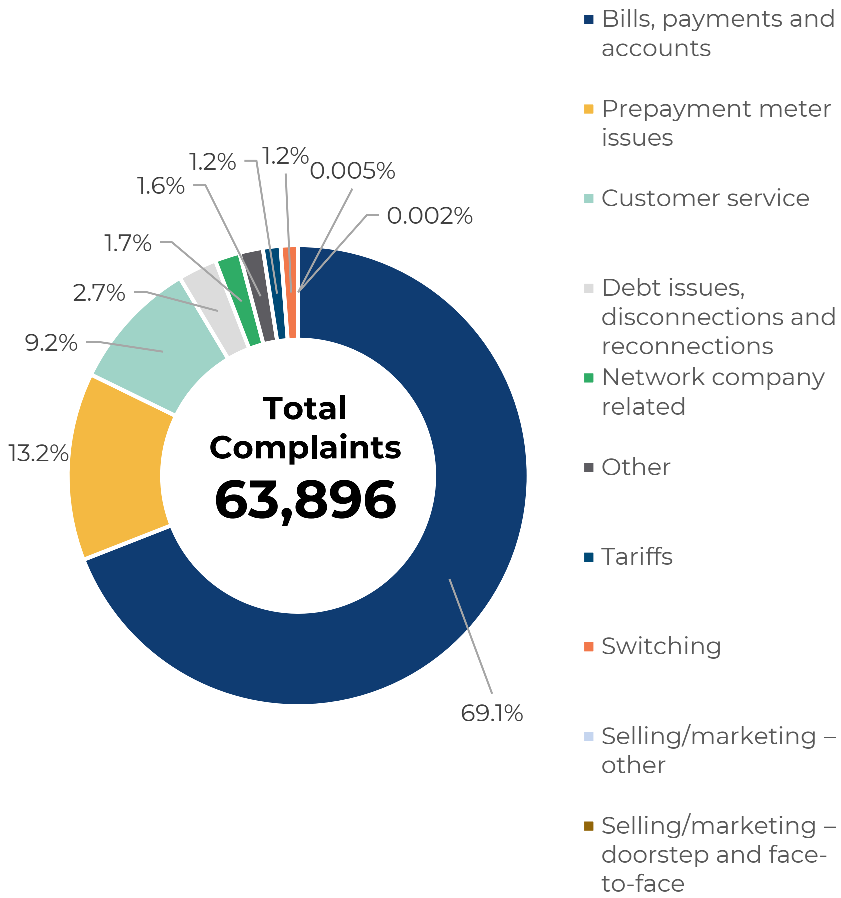
8.3 During 2024, the three most common gas supplier complaints related to; bills, payments and accounts (69%), prepayment meter issues (13%) and customer service (9%).

[26] 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).

Table 27: Gas – total complaints

Complaint Type	No. of Domestic Complaints	No. of I&C complaints	No. of Total Complaints
Bills, payments and accounts	42,080	2,048	44,128
Prepayment meter issues	8,412	3	8,415
Customer service	5,635	237	5,872
Switching	762	12	774
Other	1,031	20	1,051
Debt issues, disconnections and reconnections	1,513	230	1,743
Network company related	1,055	63	1,118
Tariffs	772	19	791
Selling/marketing – doorstep and face-to-face	1	0	1
Selling/marketing – other	2	1	3
Total	**61,263**	**2,633**	**63,896**

Figure 61: Gas – total complaints by type



Data source: NI gas suppliers

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Annex A: Background & Sources

Purpose, methodology and data 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 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's Quarterly Energy Prices reports[27] and Eurostat data base[28]) once these figures have been converted to GBP (Note: from 01 January 2021, DESNZ 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:

[27] https://www.gov.uk/government/collections/quarterly-energy-prices
[28] 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.

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 comparisons, 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[29] and Eurostat data base[30]) once these figures have been converted to GBP.

Electricity wholesale market monitoring data

Readers should also be aware of the Monthly Market Monitoring Report which provides an overview of the SEM and sets out recent trends in the market in relation to pricing, demand, scheduling and contract prices. It focuses in particular on the wholesale element of electricity prices, which makes up roughly 60% of customers' bills. These reports[31] are prepared by the Market Monitoring Unit (MMU) within the UR in joint collaboration with the Commission for Regulation of Utilities (CRU).

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

Northern Ireland gas markets

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[32] (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

[32] 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 September 2024: Share Energy
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[36] 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 September 2024: Share Energy

Gas: Greater Belfast[33]	
Domestic	Incumbent supplier since September 1996: SSE Airtricity[34]
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[35]	
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[37]	
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

[33] The Greater Belfast area is defined in Schedule 1 of the Phoenix Natural Gas Limited conveyance licence.
[34] Formerly Phoenix Supply Ltd (PSL).
[35] The Ten Towns area is defined in Schedule 1 of the firmus energy (Distribution) Limited conveyance licence.
[36] Note that firmus supply left the electricity market at the end of 2015.
[37] 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 previously 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	SEM	Single Electricity Market
GB	Great Britain	SGN NG	SGN Natural Gas
GBP	Great British Pound	S1	Semester 1
I&C	Industrial and Commercial	S2	Semester 2
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.	UR	Utility Regulator
NI	Northern Ireland	VAT	Value Added Tax
NIEN	Northern Ireland Electricity Networks	UK	United Kingdom