

# QUARTERLY RETAIL ENERGY MARKET MONITORING REPORT

**Period: 1 January to 31 March 2026**

**Published: 16 June 2026**

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**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 Quarterly Retail Energy Market Monitoring (QREMM) report is the latest of a series of Utility Regulator (UR) reports (previously known as the Quarterly Transparency Reports (QTRs)) 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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# Northern Ireland Retail Market Monitoring Quarter 1 2026

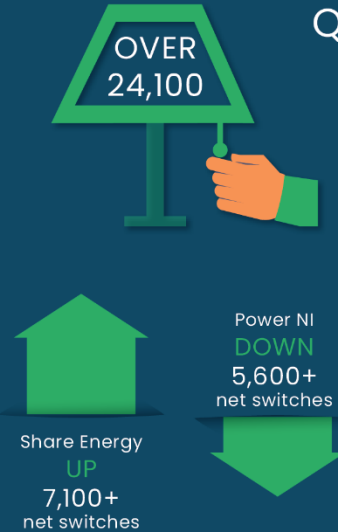
## Suppliers Electricity



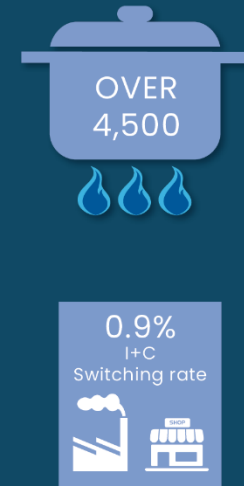
## Suppliers Gas



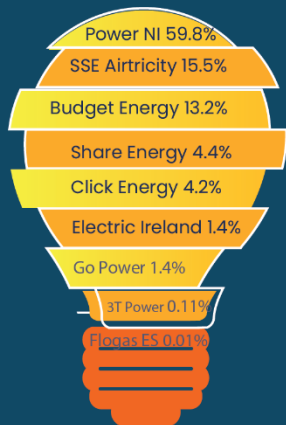
## Switching Data Electricity



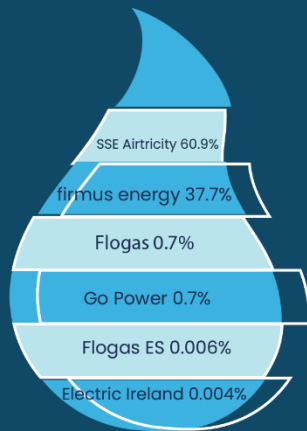
## Switching Data Gas



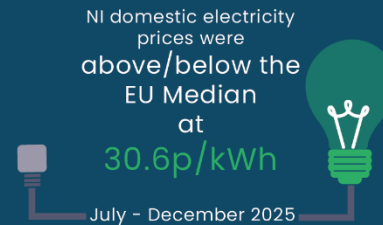
## Total market share by connections Electricity



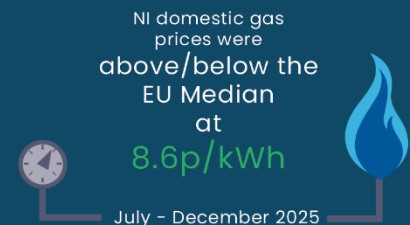
## Total market share by connections Gas



## Domestic pricing data Electricity



## Domestic pricing data Gas



# 1. Key developments during Q1 2026

1. Overall electricity switching activity in Q1 2026 was 24,100 which represented a decrease from the previous quarter (46,100). Domestic customers continue to engage in the market with over 23,000 domestic switches completed during Q1 2026, a switching rate of 2.7% (a decrease from 5.2% in Q4 2025). Furthermore, the I&C sector saw a decrease in electricity switching, with a rate of 1.4% in Q1 2026 (a decrease from 2.0%).
2. In the gas sector, domestic switching in the Greater Belfast area for Q1 2026 saw the second most switches ever completed with c4,571 switches, following the all-time high of c5,813 switches in Q4 2025, (a substantial increase from 539 in Q1 2025). I&C switching saw a slight decrease in switching activity from 1.1% in Q4 2025 To 0.9% in Q1 2026.
3. The semester 2 (July – December) 2025 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 price for NI (30.6 p/kWh) was above the UK (29.8 p/kWh) and the EU median (23.4 p/kWh) but below Ireland (35.2 p/kWh).
  - The NI I&C electricity price for the very small connections (which represent c73.5% of I&C connections) was 28.6 p/kWh, which was lower than the UK (36.7 p/kWh) but higher than Ireland (26.2 p/kWh) and the EU median (22.3 p/kWh).
  - For large and very large I&C customers (c0.023% of connections) NI price (17.8 p/kWh) was below the UK (22.6 p/kWh), but higher than the EU median (10.3 p/kWh), and Ireland (16.1 p/kWh).
4. The semester 2 (July – December) 2025 gas 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 gas price for NI (8.6 p/kWh) was below Ireland (11.3 p/kWh) and the EU (10.9 p/kWh), but higher than the UK (7.0 p/kWh).
  - The NI I&C gas price for the Very Small connections was 8.0 p/kWh, which below Ireland (9.3 p/kWh), UK (9.2 p/kWh) and the EU median (8.3 p/kWh).
  - For Medium and Large I&C customers NI gas prices (5.5 p/kWh) were higher than the EU median (4.7 p/kWh), Ireland (4.9 p/kWh), and the UK (4.2 p/kWh).

## 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<sup>1</sup>.

### Energy suppliers in NI market

	Network Operator							
	NIE Networks		Phoenix Energy <sup>2</sup>		Kinecx Energy <sup>3</sup>		Evolve <sup>4</sup>	
	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 <sup>5</sup>								
3T Power								
Share Energy								
<b>Suppliers</b>	<b>7</b>	<b>9</b>	<b>2</b>	<b>6</b>	<b>1</b>	<b>6</b>	<b>1</b>	<b>5</b>

Source: Utility Regulator

<sup>1</sup> Detail on the background to this report, information sources and methodology is contained in Annex A.

<sup>2</sup> Formerly Phoenix Natural Gas Ltd.

<sup>3</sup> Formerly firmus energy (Distribution) Ltd. Changed September 2025.

<sup>4</sup> Evolve Network, previously known as SGN up to September 2023.

<sup>5</sup> 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 During the first quarter of 2026 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 Q1 2026

Total Electricity Connections

932,347



855,421  
Domestic Connections

Domestic Credit = 463,839  
Domestic Prepayment = 391,582



76,926  
I&C Connections

I&C <20 MWh = 54,801  
I&C 20 - 49 MWh = 11,939  
I&C 50 - 499 MWh = 9,117  
I&C 500 - 1,999 MWh = 811  
I&C 2,000 - 19,999 MWh = 238  
I&C > 20,000 MWh = 20

Total Electricity Consumption

2,000 GWh



781.4 GWh  
Domestic Consumption

Domestic Credit = 447.7 GWh  
Domestic Prepayment = 333.6 GWh



1,218.4 GWh  
I&C Consumption

I&C <20 MWh = 68.7 GWh  
I&C 20 - 49 MWh = 77.5 GWh  
I&C 50 - 499 MWh = 333.6 GWh  
I&C 500 - 1,999 MWh = 230.7 GWh  
I&C 2,000 - 19,999 MWh = 318.3 GWh  
I&C > 20,000 MWh = 189.5 GWh

Domestic Electricity Pricing

30.6 p/kWh

Total Electricity Switches

24,166

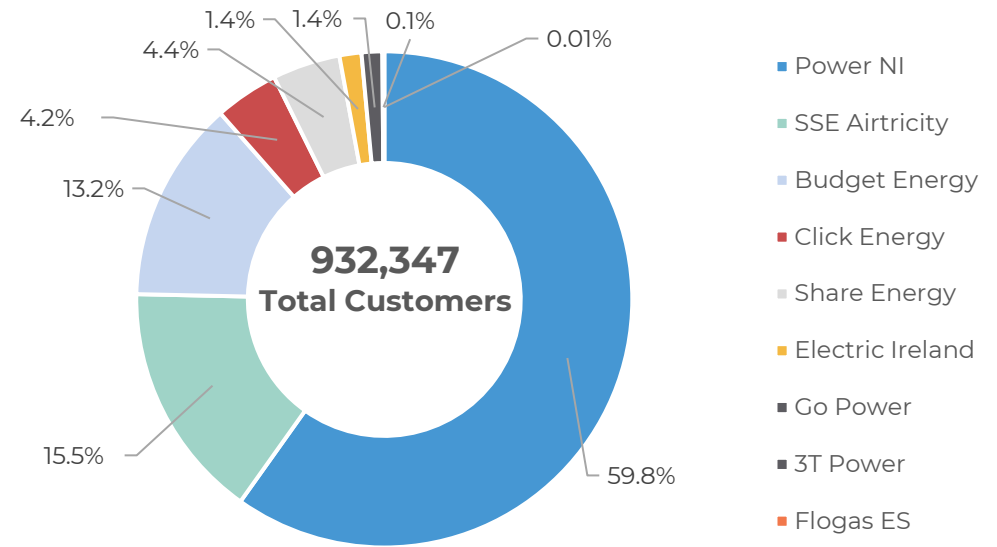
July - December 2025

## Total NI electricity market shares by connections

3.1 The chart<sup>6</sup> to the right shows the percentage market share by connections<sup>7</sup> for each electricity supplier at the **end of March 2026**.

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 59.8% share of the market.

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



**Table 1: Total Electric Market share by connections**

Market Segment	Power NI	SSE Airtricity	Budget Energy	Share Energy	Click Energy	Electric Ireland	Go Power	3T Power	Flogas ES	Total Customers
<b>Domestic credit</b>	315,849	87,203	24,270	21,951	13,149	50	1,367	0	0	463,839
<b>Domestic prepayment</b>	205,484	43,991	96,285	18,962	22,582	4,278	0	0	0	391,582
<b>I&amp;C &lt; 20 MWh</b>	28,863	9,245	1,571	169	1,692	5,257	7,461	511	32	54,801
<b>I&amp;C 20 – 49 MWh</b>	4,472	2,489	455	58	678	1,547	2,013	224	3	11,939
<b>I&amp;C 50 – 499 MWh</b>	2,964	1,368	189	59	734	1,876	1,623	262	42	9,117
<b>I&amp;C 500 – 1,999 MWh</b>	275	109	0	4	25	237	108	30	23	811
<b>I&amp;C 2,000 – 19,999 MWh</b>	92	19	0	0	10	91	19	1	6	238
<b>I&amp;C ≥ 20,000 MWh</b>	1	5	0	0	0	12	2	0	0	20
<b>Total</b>	<b>558,000</b>	<b>144,429</b>	<b>122,770</b>	<b>41,203</b>	<b>38,870</b>	<b>13,348</b>	<b>12,593</b>	<b>1,028</b>	<b>106</b>	<b>932,347</b>

Data source: Northern Ireland Electricity Network (NIEN)

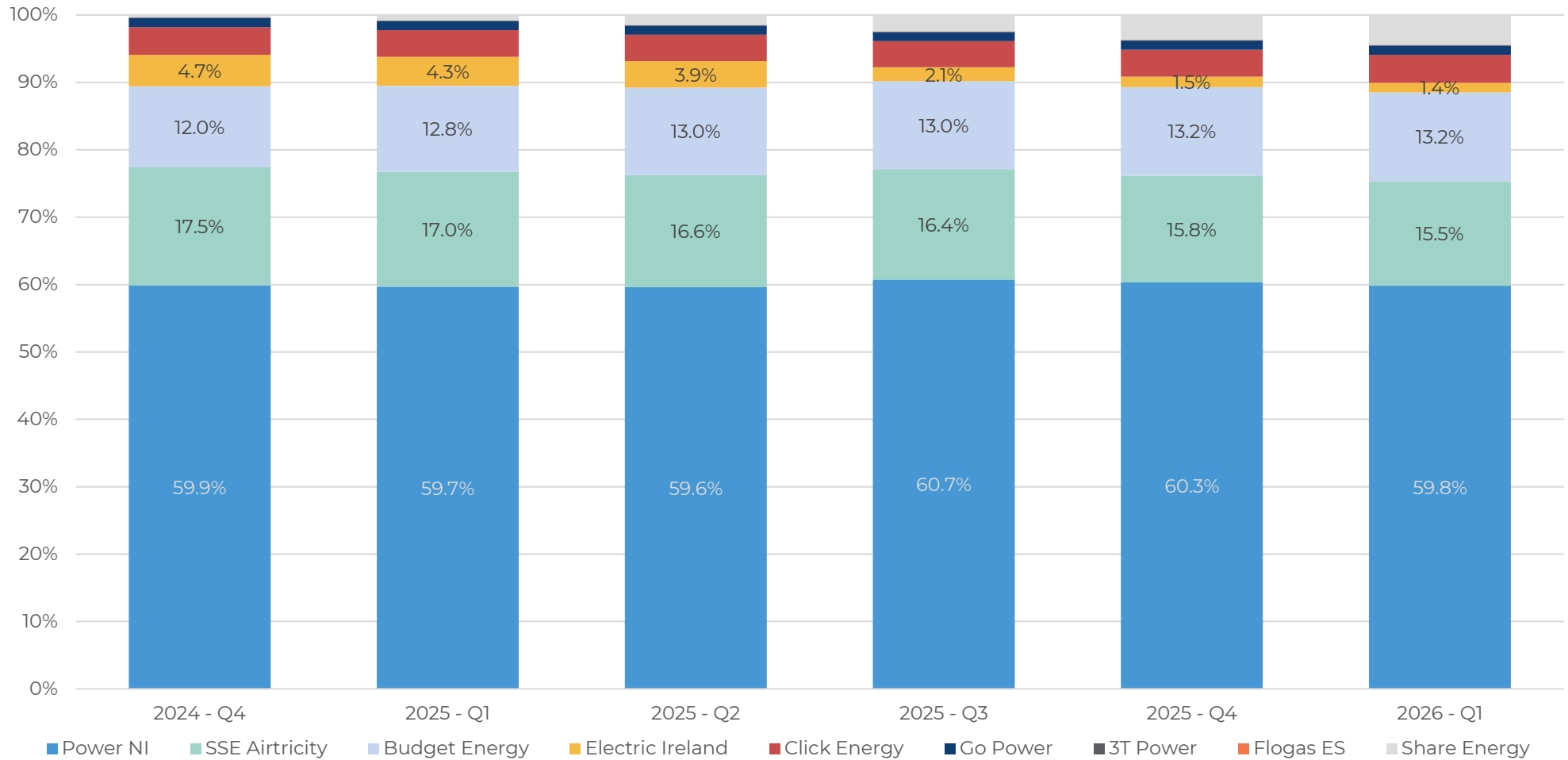
<sup>6</sup> Please note the percentages in the chart may not tally to 100% as the data labels for some suppliers are not labelled due to the size of their market share.

<sup>7</sup> Note that long-term vacant sites are not included in connection numbers, and that combined premises are included in the <20MWh category.



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 previous six quarters.

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



Data source: NIEN

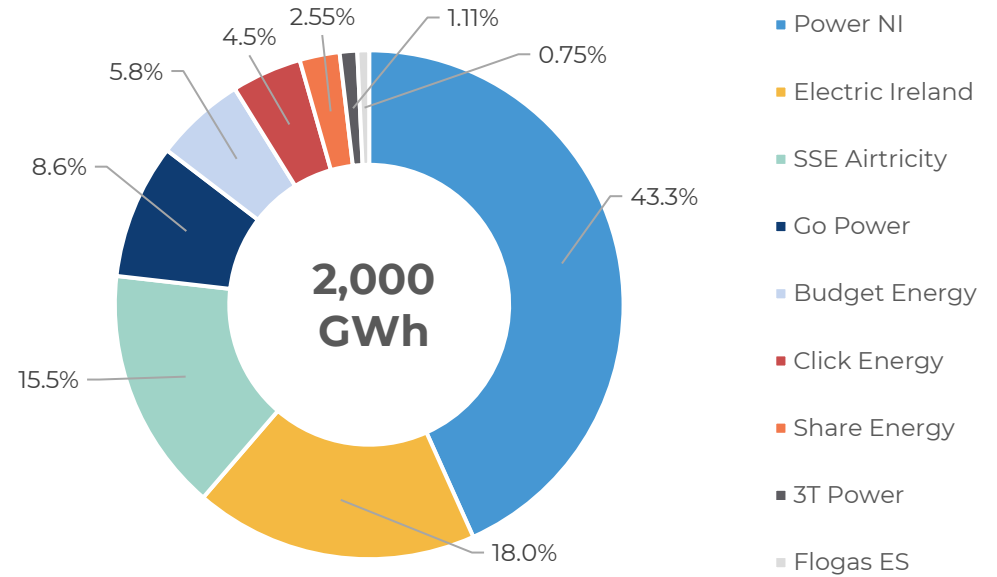


## Total NI electricity market shares by consumption

3.3 The chart to the right shows the percentage market share by consumption for each electricity supplier for the period **January to March 2026**.

3.4 Electricity consumption in the NI retail market for Q1 2026 was 2,000 GWh.

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



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

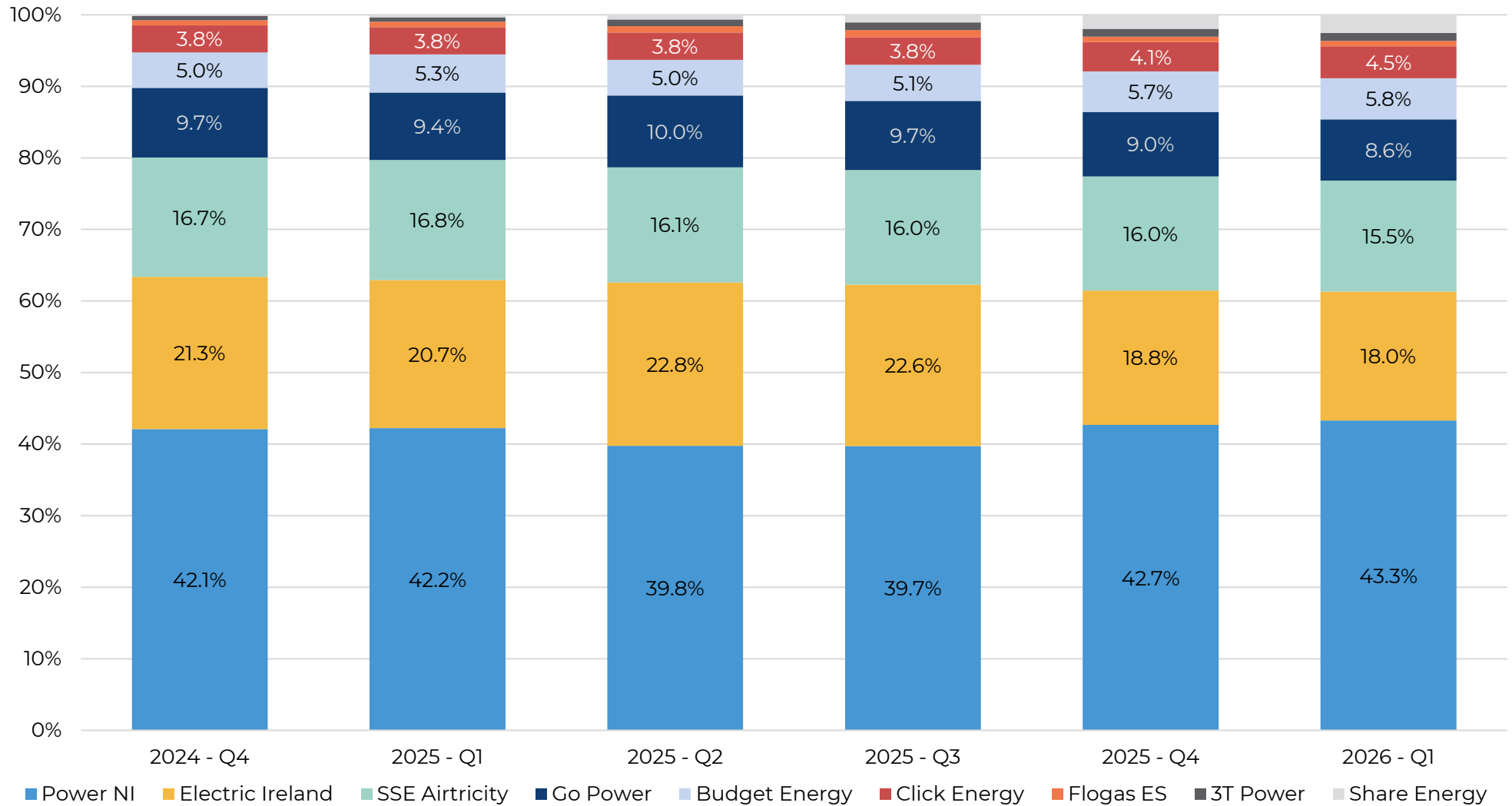
Market Segment	Power NI	Electric Ireland	SSE Airtricity	Go Power	Budget Energy	Click Energy	Share Energy	Flogas ES	3T Power	Total Consumption
<b>Domestic credit</b>	287.9	0.0	85.4	2.6	24.5	17.2	30.1	0.0	0.0	447.7
<b>Domestic prepayment</b>	179.4	3.1	33.9	0.0	78.7	21.2	17.5	0.0	0.0	333.6
<b>I&amp;C &lt; 20 MWh</b>	34.2	6.3	13.8	8.1	2.9	2.1	0.3	0.3	0.8	68.7
<b>I&amp;C 20 – 49 MWh</b>	28.6	11.7	16.7	11.1	3.8	3.9	0.3	0.0	1.4	77.5
<b>I&amp;C 50 – 499 MWh</b>	108.8	80.1	47.0	54.7	5.3	23.0	1.6	2.5	10.6	333.6
<b>I&amp;C 500 – 1,999 MWh</b>	89.2	58.7	26.5	32.6	0.0	7.6	1.2	6.3	8.6	230.7
<b>I&amp;C 2,000 – 19,999 MWh</b>	130.8	116.5	30.1	20.2	0.0	14.1	0.0	5.8	0.8	318.3
<b>I&amp;C ≥ 20,000 MWh</b>	6.8	84.1	56.4	42.2	0.0	0.0	0.0	0.0	0.0	189.5
<b>Total</b>	<b>865.7</b>	<b>360.5</b>	<b>309.9</b>	<b>171.4</b>	<b>115.1</b>	<b>89.1</b>	<b>50.9</b>	<b>15.0</b>	<b>22.2</b>	<b>1,999.8</b>

Data source: NIEN



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 previous six quarters.

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



Data source: NIEN

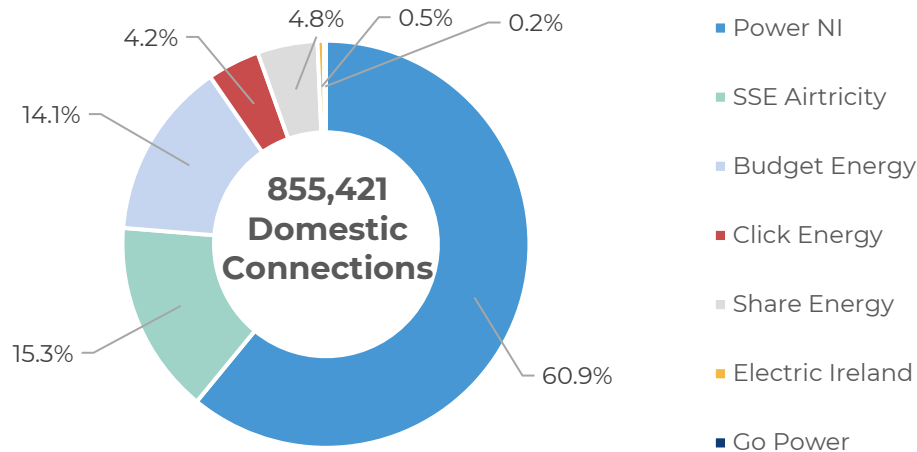


## Domestic electricity market analysis by connections

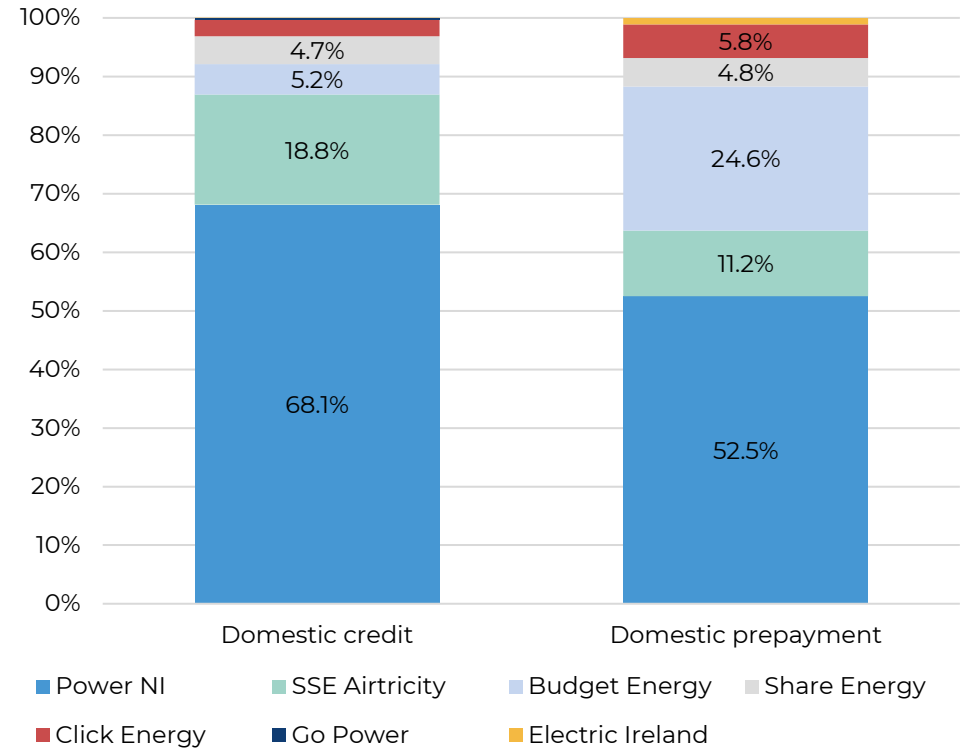
3.5 This section of the report provides a more detailed analysis of the electricity domestic market, by connections.

3.6 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		Share Energy		Click Energy		Electric Ireland		Go Power		Total Customers	
	Number	%	Number	%	Number	%	Number	%	Number	%	Number	%	Number	%	Number	%
<b>Domestic prepayment</b>	205,484	39%	43,991	34%	96,285	80%	18,962	46%	22,582	63%	4,278	99%	0	0%	391,582	46%
<b>Domestic credit</b>	315,849	61%	87,203	66%	24,270	20%	21,951	54%	13,149	37%	50	1%	1,367	100%	463,839	54%
<b>Total</b>	<b>521,333</b>		<b>131,194</b>		<b>120,555</b>		<b>40,913</b>		<b>35,731</b>		<b>4,328</b>		<b>1,367</b>		<b>855,421</b>	

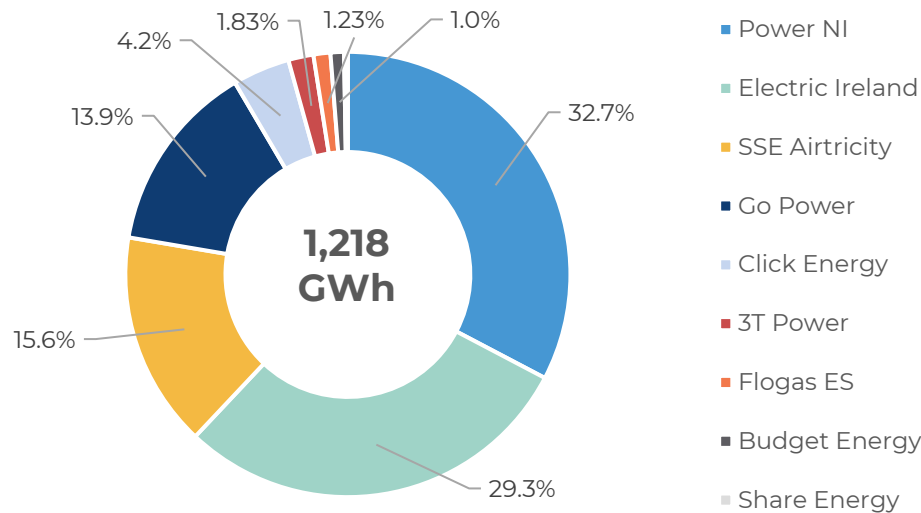
Data source: NIEN



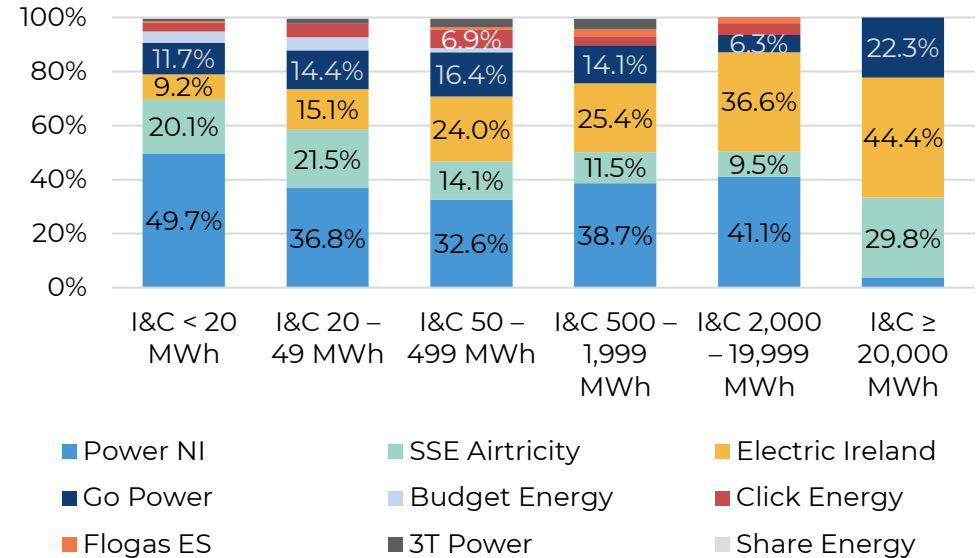
## I&C electricity market analysis by consumption

3.7 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 1,218.4 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	Power NI	Electric Ireland	SSE Airtricity	Go Power	Click Energy	Flogas ES	3T Power	Budget Energy	Share Energy	Total Consumption
I&C < 20 MWh	34.2	6.3	13.8	8.1	2.1	0.3	0.8	2.9	0.3	68.7
I&C 20 - 49 MWh	28.6	11.7	16.7	11.1	3.9	0.0	1.4	3.8	0.3	77.5
I&C 50 - 499 MWh	108.8	80.1	47.0	54.7	23.0	2.5	10.6	5.3	1.6	333.6
I&C 500 - 1,999 MWh	89.2	58.7	26.5	32.6	7.6	6.3	8.6	0.0	1.2	230.7
I&C 2,000 - 19,999 MWh	130.8	116.5	30.1	20.2	14.1	5.8	0.8	0.0	0.0	318.3
I&C ≥ 20,000 MWh	6.8	84.1	56.4	42.2	0.0	0.0	0.0	0.0	0.0	189.5
<b>Total</b>	<b>398.4</b>	<b>357.4</b>	<b>190.6</b>	<b>168.9</b>	<b>50.7</b>	<b>15.0</b>	<b>22.2</b>	<b>11.9</b>	<b>3.35</b>	<b>1,218.4</b>

Data source: NIEN



## Market activity - switching

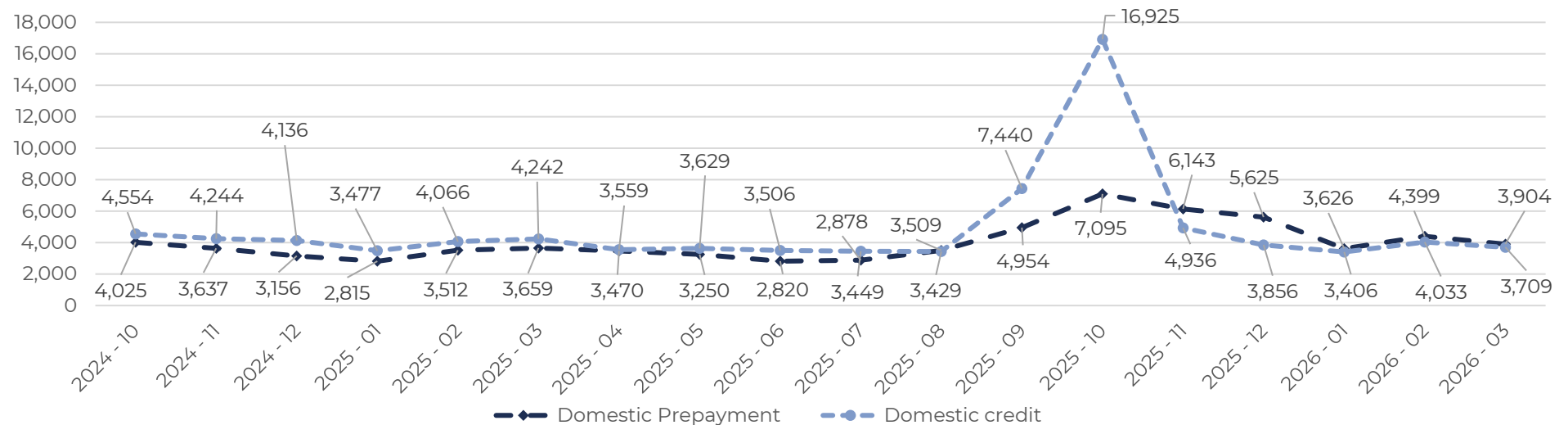
3.8 The table below shows the total market activity through changes of supplier (CoSs) on a quarterly basis for the domestic and I&C sectors including the quarterly switching rate<sup>8</sup>.

**Table 5: Switching rate – total NI market**

Quarter	2024 - Q4	2025 - Q1	2025 - Q2	2025 - Q3	2025 - Q4	2026 - Q1
<b>No. of Switches</b>	24,939	22,897	21,747	27,430	46,128	24,166
<b>Switching rate (%)</b>	2.7%	2.5%	2.3%	3.0%	5.0%	2.6%

3.9 The graph below shows the number of domestic switches, split by domestic credit and domestic prepayment on a monthly basis. The increase seen in September can largely be attributed to Electric Ireland domestic credit customers either switching themselves or being transferred to Power NI.

**Figure 9: Electricity - monthly domestic switching**



Data source: NIEN

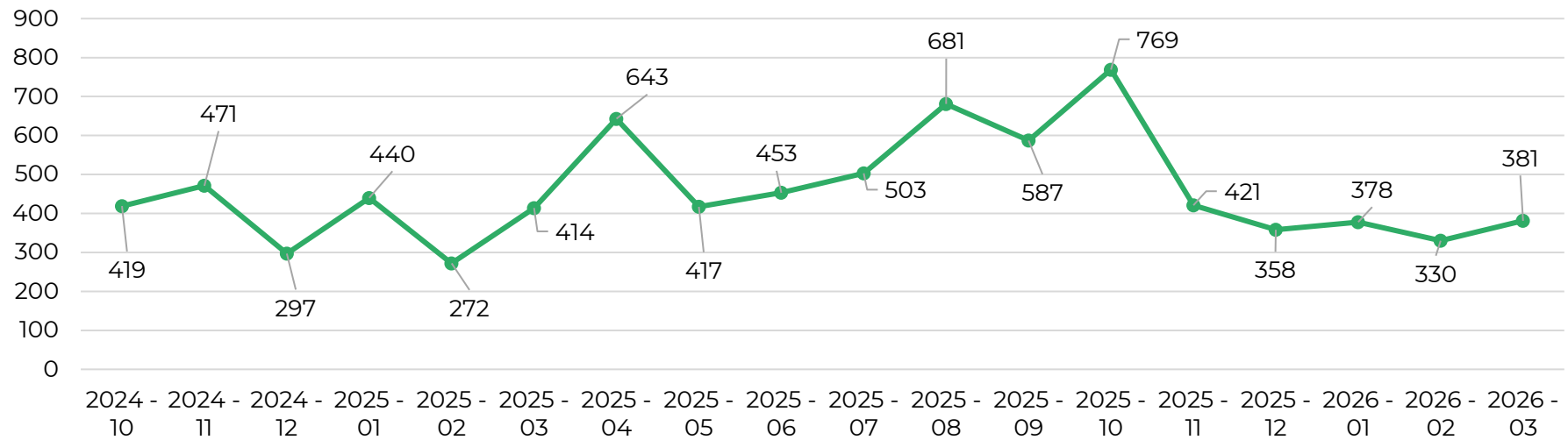
<sup>8</sup> The switching rate percentages are calculated using the number of quarterly switches divided by the number of customers at the end of the quarter in the relevant market.

**Table 6: Switching rate – domestic market**

Quarter	2024 - Q4	2025 - Q1	2025 - Q2	2025 - Q3	2025 - Q4	2026 - Q1
<b>No. of Switches</b>	23,752	21,771	20,234	25,659	44,580	23,077
<b>Switching rate (%)</b>	2.8%	2.6%	2.4%	3.0%	5.2%	2.7%

3.10 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 the quarter.

**Figure 10: Electricity - monthly I&C switching**



**Table 7: Switching rate – I&C market**

Quarter	2024 - Q4	2025 - Q1	2025 - Q2	2025 - Q3	2025 - Q4	2026 - Q1
<b>No. of Switches</b>	1,187	1,126	1,513	1,771	1,548	1,089
<b>Switching rate (%)</b>	1.5%	1.5%	2.0%	2.3%	2.0%	1.4%

Data Source: NIEN



## 4. Electricity pricing<sup>9</sup> – semester 2 2025

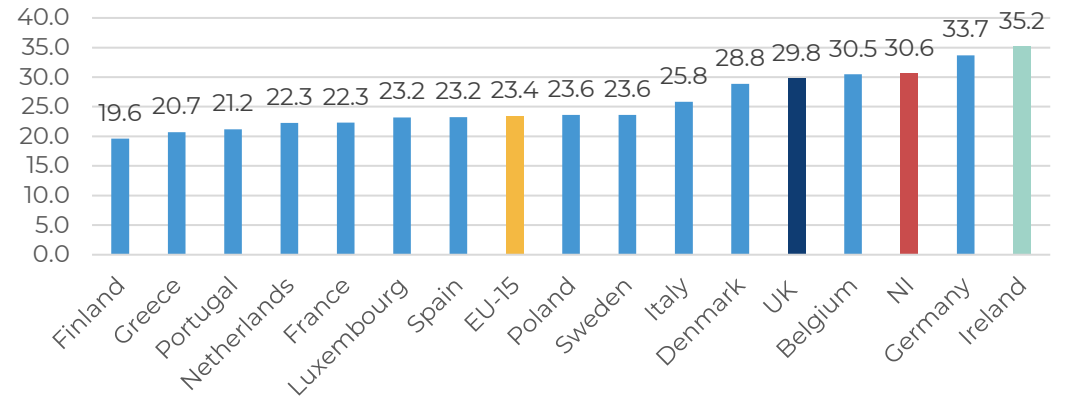
4.1 **Domestic price comparison with EU:** In the domestic graphs shown, we use unit prices which include Climate Change Levy (CCL) and include VAT as this reflects the final prices paid by domestic customers. The medium sized domestic customers (annual consumption of between 2,500 and 4,999 kWh) have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

4.2 Figure 11 shows for semester 2 (July to December) 2025 the domestic electricity prices for NI (30.6 p/kWh) were above the UK (29.8 p/kWh) and the EU median (23.4 p/kWh) but below Ireland (35.2 p/kWh).

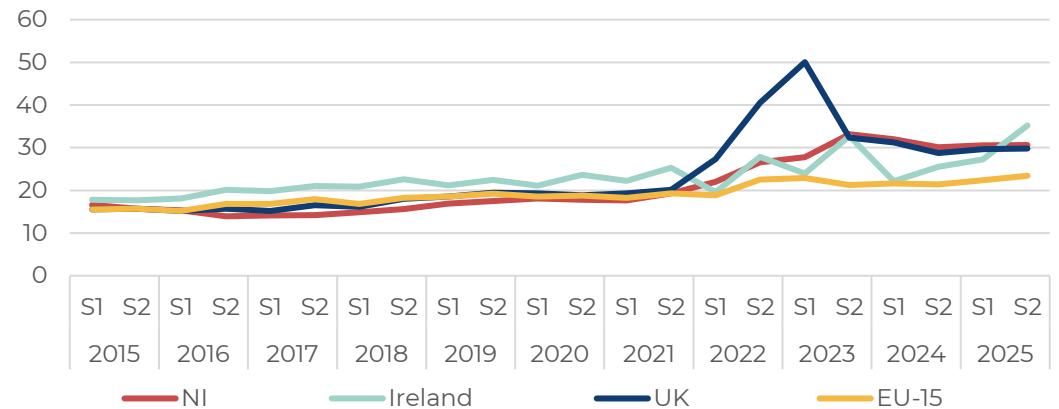
4.3 Figure 12<sup>10</sup> shows the medium domestic connections unit price<sup>10</sup> (incl. all taxes) over the last eleven years compared to the EU median, UK and Ireland.

4.4 The recently announced changes to Northern Ireland’s regulated tariffs are not reflected in this report due to the mismatch in time horizons.

**Figure 11<sup>10</sup>: Medium domestic connections unit prices incl. all taxes (July - December 2025)**



**Figure 12<sup>10</sup>: Medium domestic connections - unit price over time**



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

<sup>9</sup> The pricing data is accurate at the time of publication and covers July–December 2025, based on available sources and subject to revision.

<sup>10</sup> 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](#).

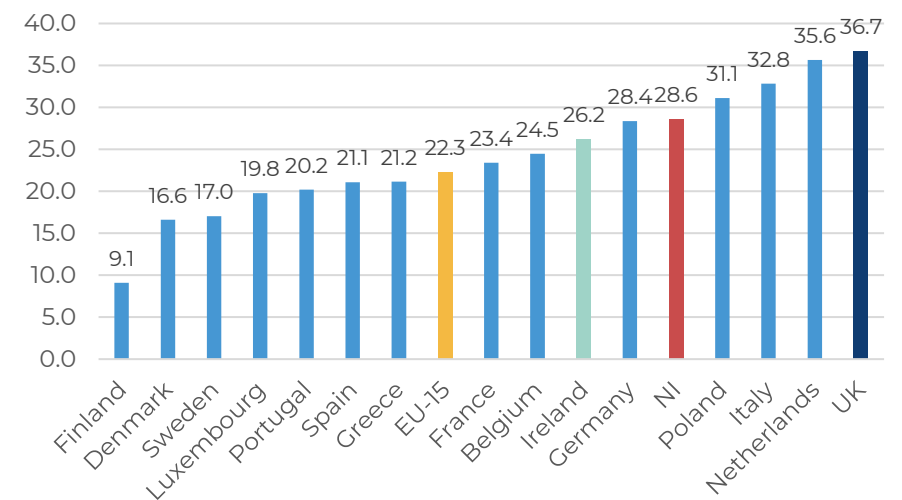
4.5 **I&C price comparison with EU:** The graphs below show I&C electricity prices in the 15 EU<sup>11</sup> countries (converted to GBP) and in NI, per consumption size bands (following standard EU categorisation). The I&C graphs use unit prices which include Climate Change Levy (CCL) but exclude VAT, 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 2 2025 (July – December) the NI prices in the very small I&C category (c73.5% of I&C connections in NI are in this size category) were lower than UK but higher than Ireland and the EU median. During the same period, for the large and very large I&C customers (c0.023% of connections), NI prices were lower than the UK, but higher than the EU median and Ireland.

**Table 8: I&C connections and consumption end of Q4 2025**

Size of Customer	Annual Consumption bands (MWh)	% of I&C connections	% of I&C consumption	I&C connection numbers
<b>Very small</b>	< 20	71.3%	5.1%	54,827
<b>Small</b>	20 – 499	27.3%	32.9%	20,978
<b>Small / Medium</b>	500 – 1,999	1.1%	19.1%	808
<b>Medium</b>	2,000 – 19,999	0.3%	26.8%	235
<b>Large &amp; Very Large</b>	>20,000	0.03%	16.1%	20

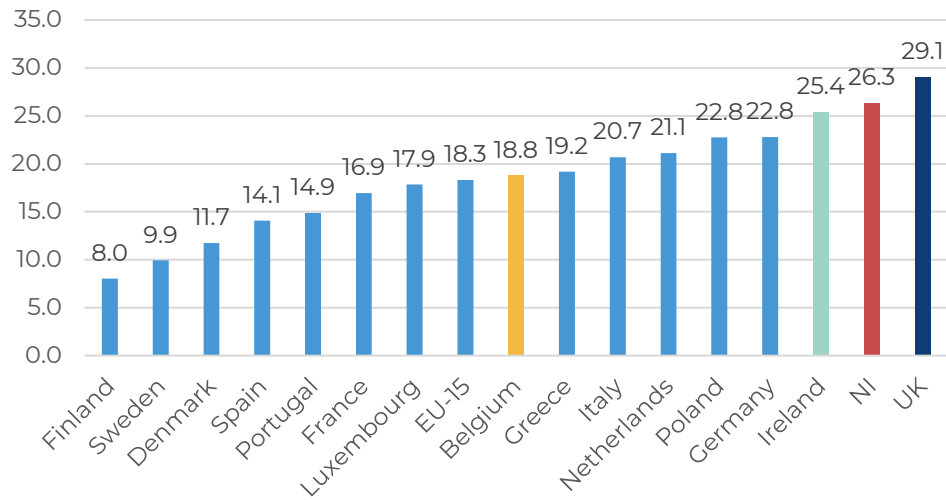
**Figure 13: Very small connections prices excl. VAT, incl. other taxes**



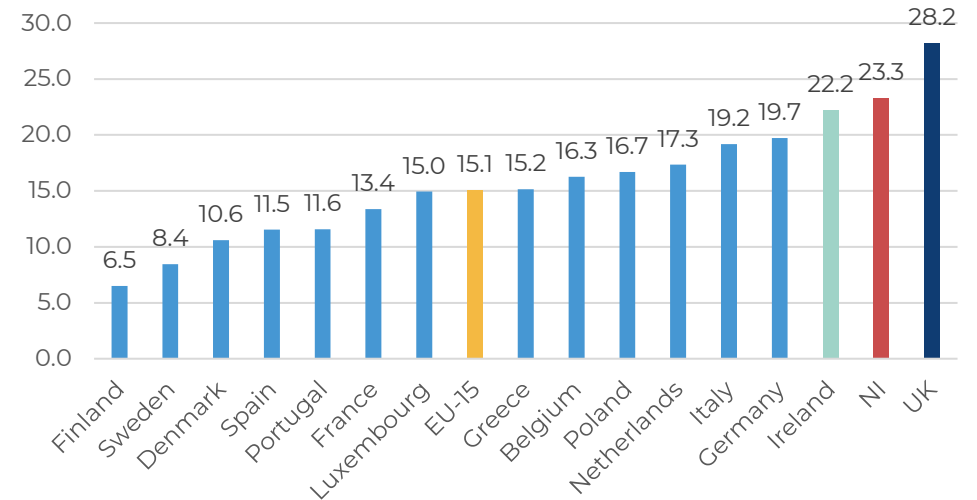
Data source: NIEN

<sup>11</sup> Some graphs do not include all 15 EU countries due to availability of data from Eurostat.

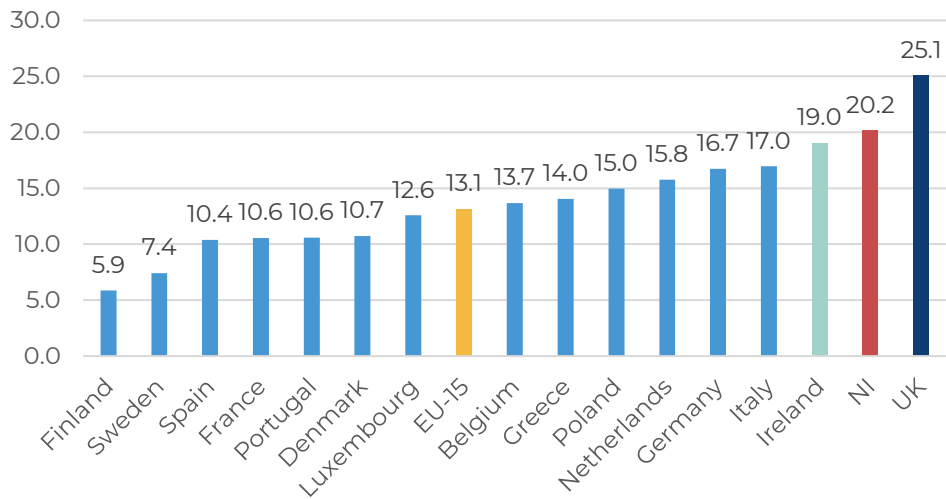
**Figure 14: Small connections prices excl. VAT, incl. other taxes**



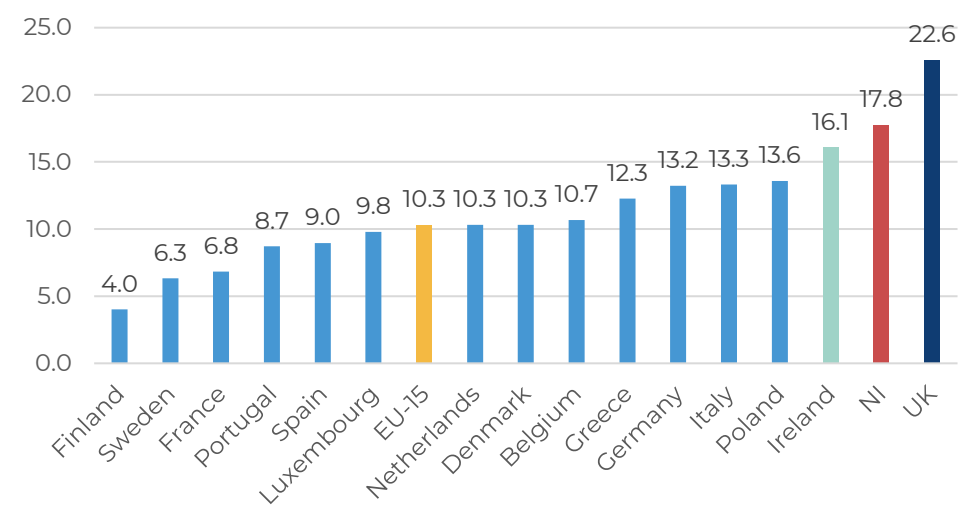
**Figure 15: Small/medium connections prices excl. VAT, incl. other taxes**



**Figure 16: Medium connections prices excl. VAT, incl. other taxes**



**Figure 17: Large + very large connections prices excl. VAT, incl. other taxes**

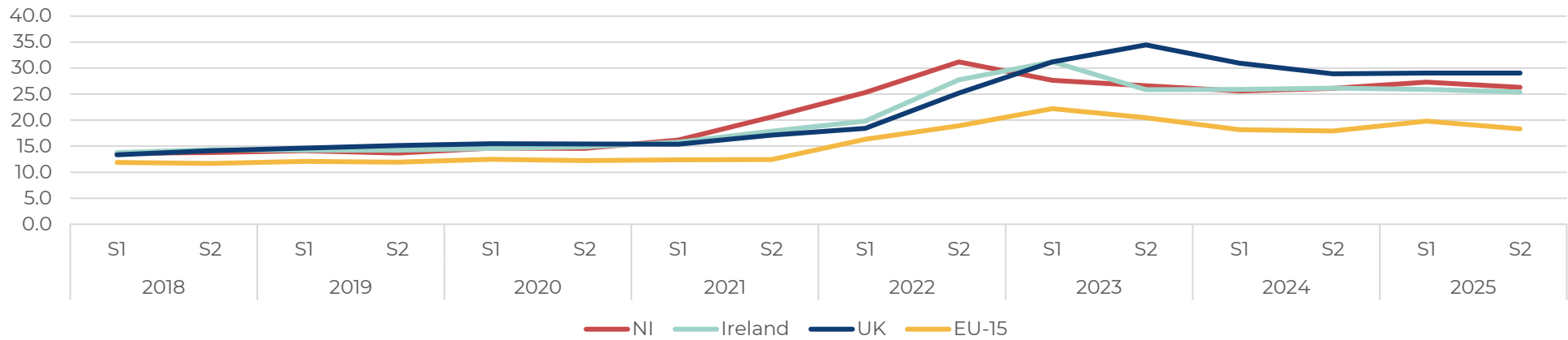


Data source: NI electricity suppliers, DESNZ, Eurostat and UR internal calculations

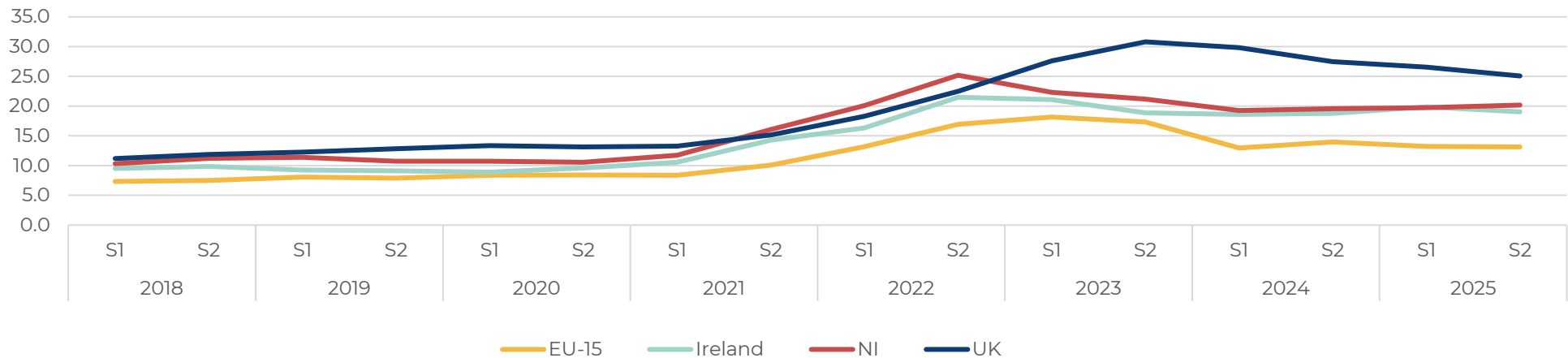


4.7 The graphs below show the unit price over time for the two I&C groups (Small and Medium) which have the majority percentage share of I&C sector, by consumption.

**Figure 18: Small I&C connections - unit price over time**



**Figure 19: Medium I&C connections - unit price over time**



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

## 5. Gas

### Gas Q1 2026

Total Gas Connections

346,462

Total Gas Consumption

2,599,470 MWh

West  
Connections  
5,460

Consumption  
223,854 MWh



G. Belfast  
Connections  
263,002

Consumption  
1,685,877 MWh

Ten Towns  
Connections  
78,000

Consumption  
689,739 MWh

Domestic Gas Pricing

8.6 p/kWh

Total Gas Switches

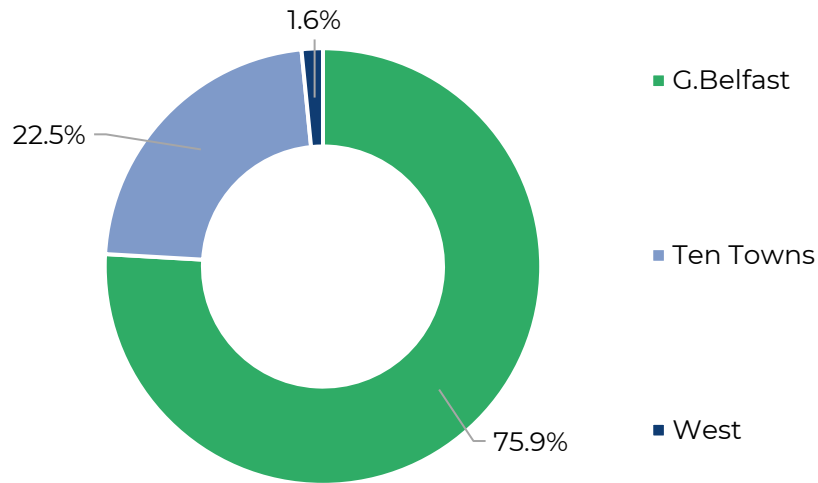
4,571

July - December 2025

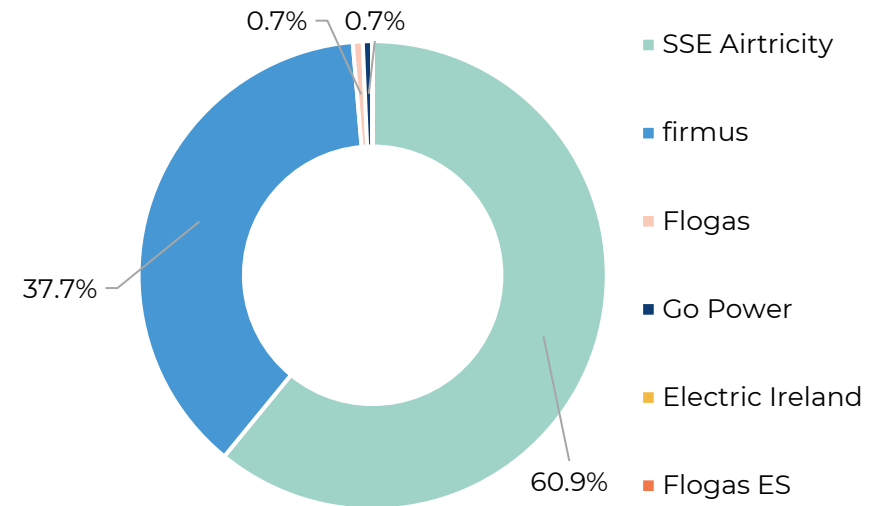
## Total gas NI market share by connections

5.1 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<sup>12</sup> are as at the **end of March 2026**.

**Figure 20: Gas market share by distribution license area by connections**



**Figure 21: Gas market share by supplier by connections**



**Table 9: 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	200,198	51,131	2	6	0	0	251,337
G.Belfast	I&C Only	5,478	2,655	1,753	1,757	16	6	11,665
Ten Towns	Domestic Only	0	74,813	0	0	0	0	74,813
Ten Towns	I&C Only	96	1,980	585	515	6	5	3,187
West	Domestic Only	5,301	0	0	0	0	0	5,301
West	I&C Only	23	66	37	31	0	2	159
<b>Total</b>		<b>211,096</b>	<b>130,645</b>	<b>2,377</b>	<b>2,309</b>	<b>22</b>	<b>13</b>	<b>346,462</b>

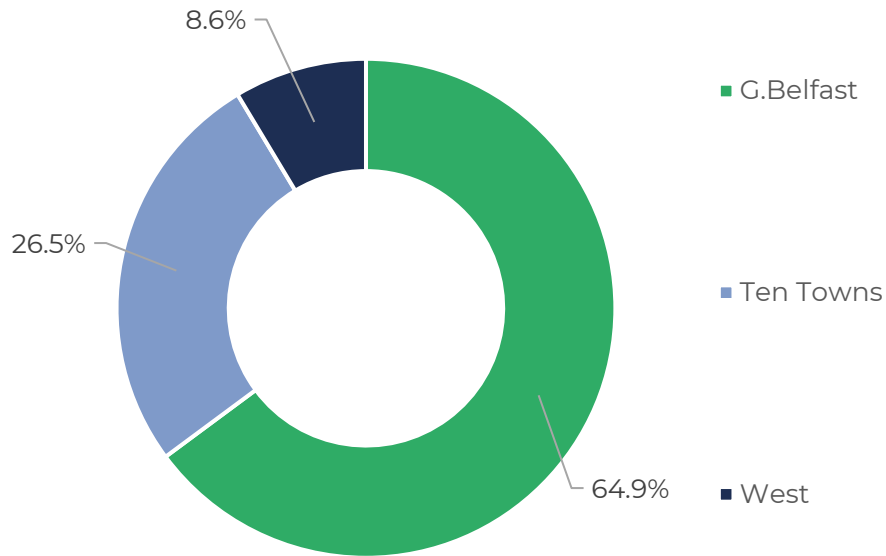
Data source: Phoenix Energy / FeDL / Evolve

<sup>12</sup> 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.

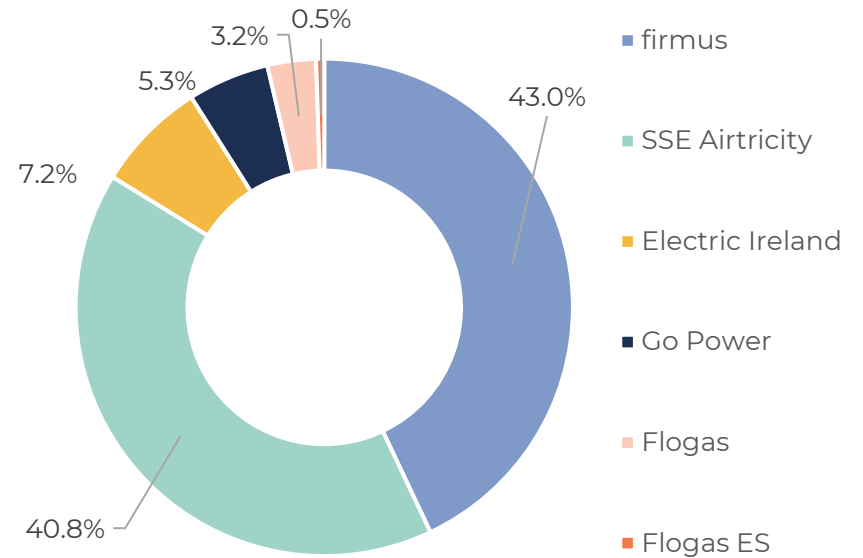
## Total gas NI market share by consumption

5.2 The pie chart below shows the total gas consumption in NI for the period **January to March 2026**, with a breakdown by distribution area.

**Figure 22: Gas market share by distribution license area by consumption**



**Figure 23: Gas market share by supplier by consumption**



**Table 10: Gas market share by consumption (MWh)**

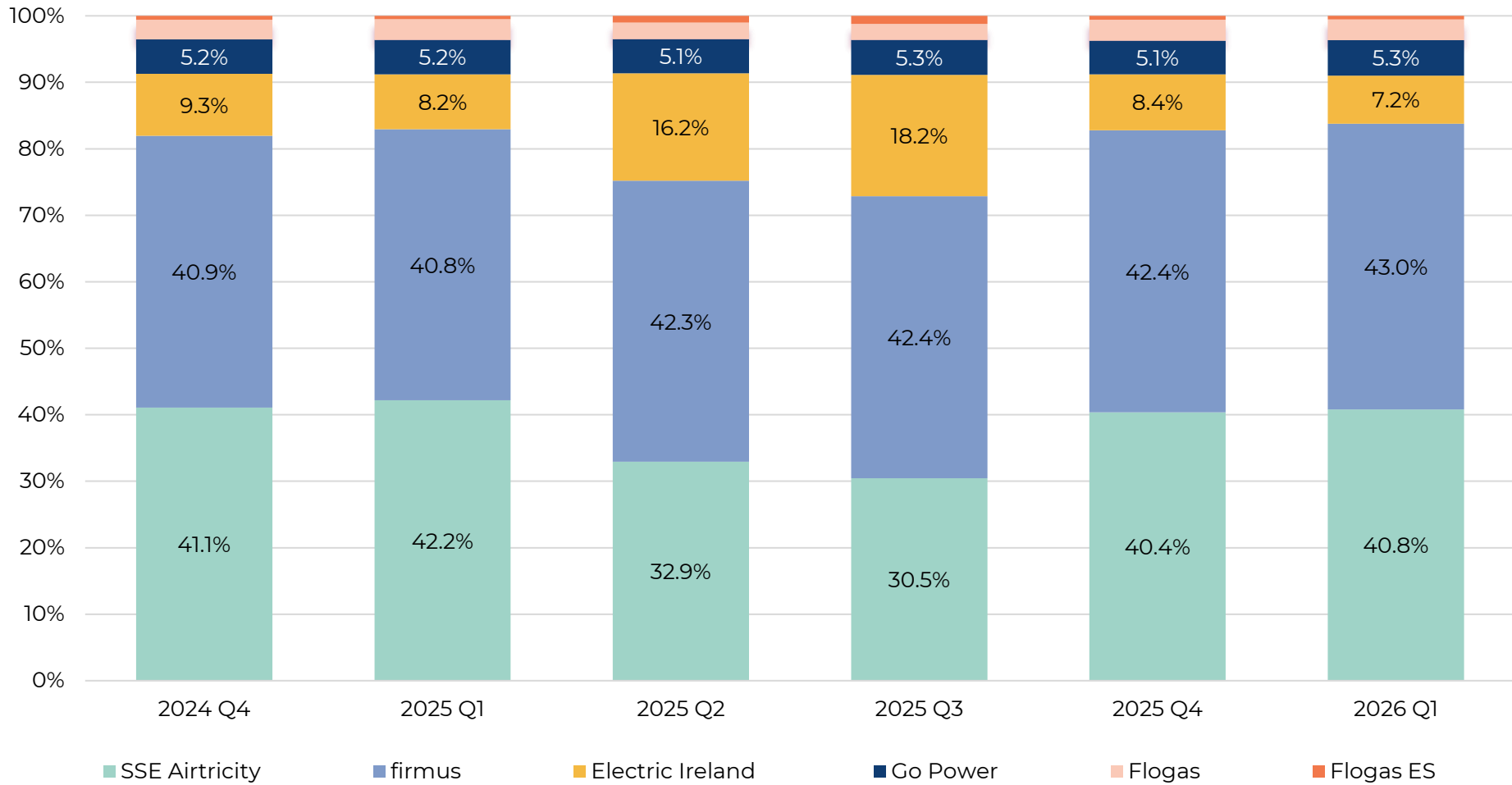
Distribution Licensed Area	firmus	SSE Airtricity	Electric Ireland	Go Power	Flogas	Flogas ES	Total Consumption
<b>G.Belfast</b>	544,469	937,469	43,400	92,521	59,283	8,734	1,685,877
<b>Ten Towns</b>	532,399	63,903	26,042	42,546	19,936	4,913	689,739
<b>West</b>	40,227	59,655	118,557	2,623	2,791	0	223,854
<b>Total</b>	<b>1,117,095</b>	<b>1,061,028</b>	<b>187,999</b>	<b>137,691</b>	<b>82,010</b>	<b>13,647</b>	<b>2,599,470</b>

Data source: Phoenix Energy / FeDL / Evolve



5.3 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 previous six quarters.

**Figure 24: Gas market share by consumption over time - total NI market**



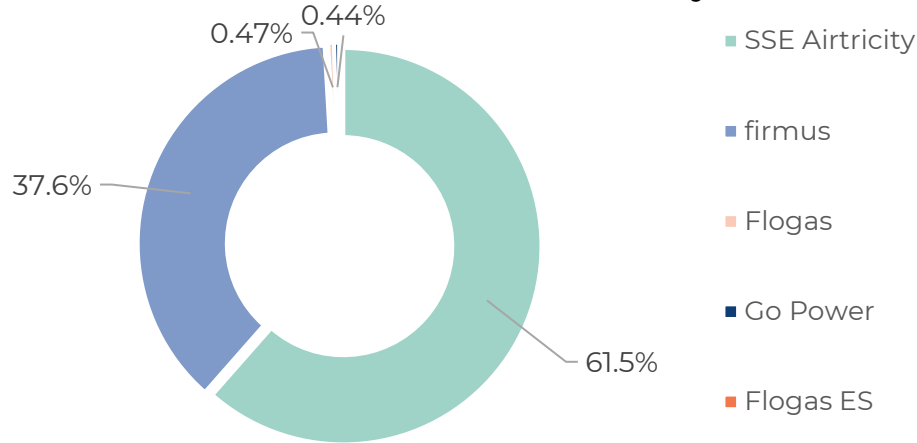
Data source: Phoenix Energy / FeDL / Evolve



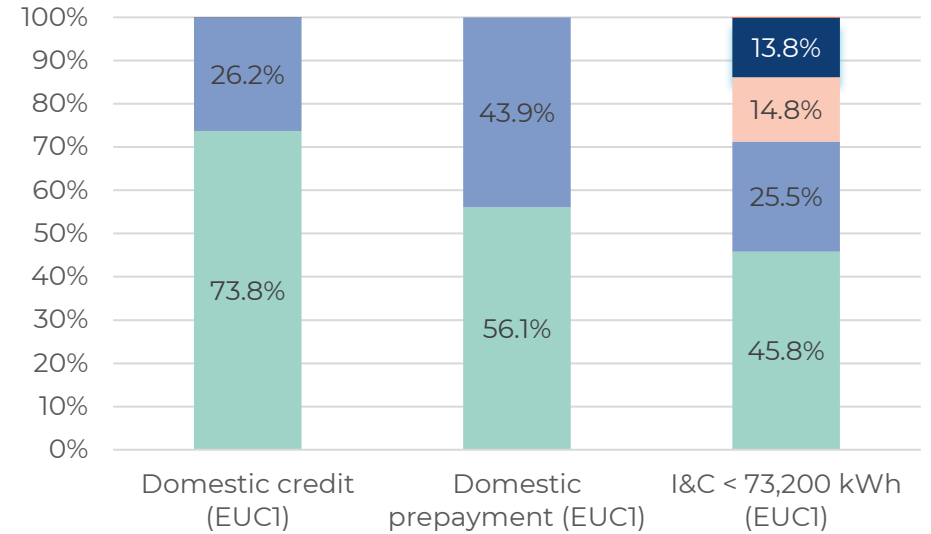
## Domestic and small I&C analysis by connections

5.4 This section of the report provides a more detailed analysis of the gas **domestic and small I&C sector**<sup>13</sup>, by connections (at the end of March 2026).

**Figure 25: Domestic and small I&C market shares by connections**



**Figure 26: Domestic and small I&C connections by market segment**



**Table 11: 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)	80,397	11,691	2	6	0	92,096
G.Belfast	Domestic prepayment (EUC1)	119,801	39,440	0	0	0	159,241
G.Belfast	I&C < 73,200 kWh (EUC1)	4,924	1,467	1,183	1,174	6	8,754
Ten Towns	Domestic credit (EUC1)	0	17,410	0	0	0	17,410
Ten Towns	Domestic prepayment (EUC1)	0	57,403	0	0	0	57,403
Ten Towns	I&C < 73,200 kWh (EUC1)	11	1,259	391	294	0	1,955
West	Domestic credit (EUC1)	1,404	0	0	0	0	1,404
West	Domestic prepayment (EUC1)	3,897	0	0	0	0	3,897
West	I&C < 73,200 kWh (EUC1)	14	27	26	24	0	91
<b>Total</b>		<b>210,448</b>	<b>128,697</b>	<b>1,602</b>	<b>1,498</b>	<b>6</b>	<b>342,251</b>

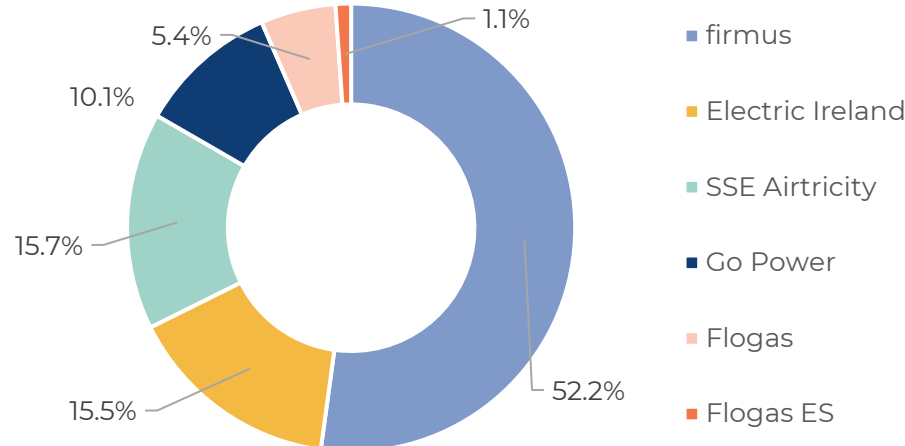
Data sources: Phoenix Energy / FeDL / Evolve

<sup>13</sup> The domestic and small I&C sector relates to any customers using less than 73,200 kWh per annum.

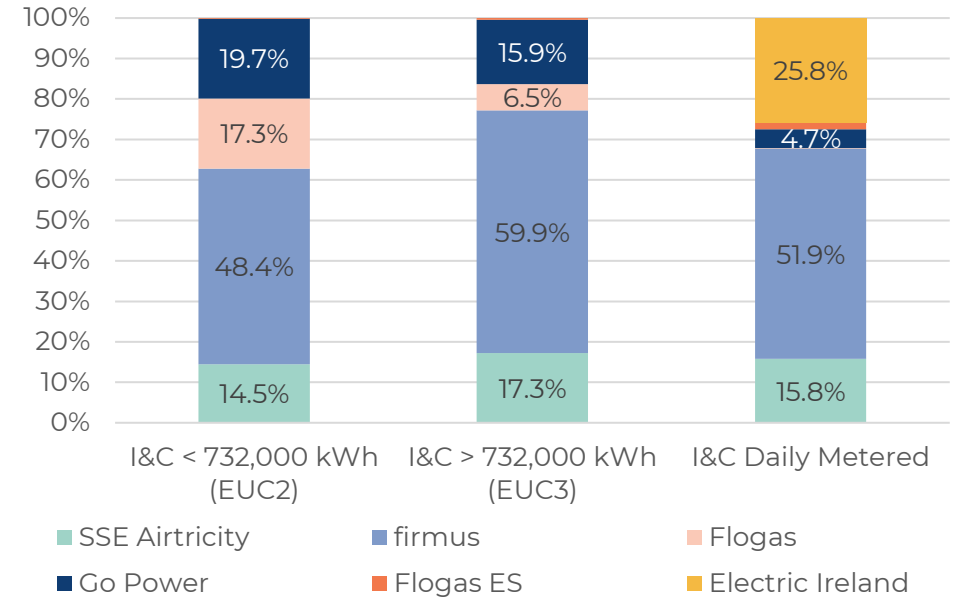
## Medium and large I&C analysis by consumption

5.5 This section of the report provides a more detailed analysis of the gas **medium and large I&C sector**<sup>14</sup>, by consumption.

**Figure 27: Medium and large I&C market share by consumption**



**Figure 28: Medium and large I&C market share by market segment and consumption**



**Table 12: Medium and large I&C analysis by consumption (MWh)**

Distribution Licensed Area	Market Segment	firmus	SSE Airtricity	Electric Ireland	Go Power	Flogas	Flogas ES	Total Consumption
G.Belfast	I&C < 732,000 kWh (EUC2)	92,326	40,124	0	42,680	39,627	380	215,138
G.Belfast	I&C > 732,000 kWh (EUC3)	59,281	19,291	0	20,076	7,564	0	106,211
G.Belfast	I&C Daily Metered	192,509	25,436	43,400	18,397	0	8,317	288,059
Ten Towns	I&C < 732,000 kWh (EUC2)	54,966	4,258	0	17,834	13,010	71	90,139
Ten Towns	I&C > 732,000 kWh (EUC3)	41,200	10,302	0	6,365	2,854	746	61,467
Ten Towns	I&C Daily Metered	152,721	49,251	26,042	15,151	0	4,095	247,260
West	I&C < 732,000 kWh (EUC2)	2,255	314	0	552	824	0	3,945
West	I&C > 732,000 kWh (EUC3)	3,797	445	0	1,185	971	0	6,398
West	I&C Daily Metered	33,741	40,572	118,557	697	806	0	194,373
<b>Total</b>		<b>632,795</b>	<b>189,992</b>	<b>187,999</b>	<b>122,937</b>	<b>65,656</b>	<b>13,610</b>	<b>1,212,990</b>

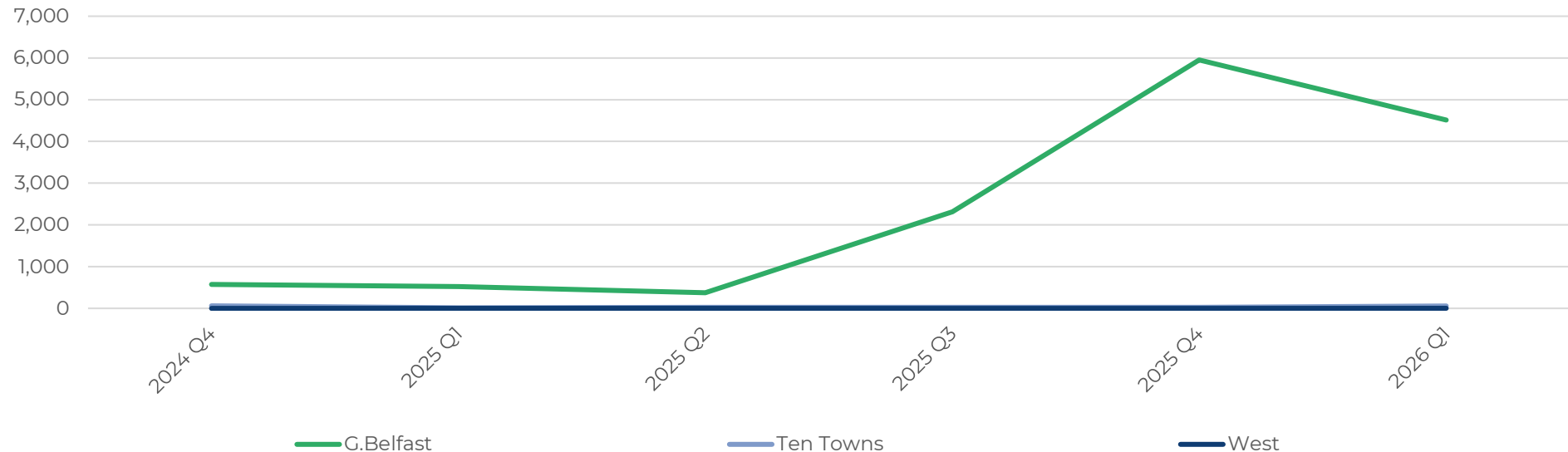
Data sources: Phoenix Energy / FeDL / Evolve

<sup>14</sup> 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.

## Market activity - switching

5.6 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<sup>15</sup> per quarter.

**Figure 29: Gas - quarterly total change of supplier**



5.7 Figure 29 shows a peak in switching activity in the NI gas market during Q4 2025. This is mostly caused by increased switching in domestic prepayment customers in Greater Belfast which is shown in figure 30 below.

**Table 13: Switching rate – total NI market**

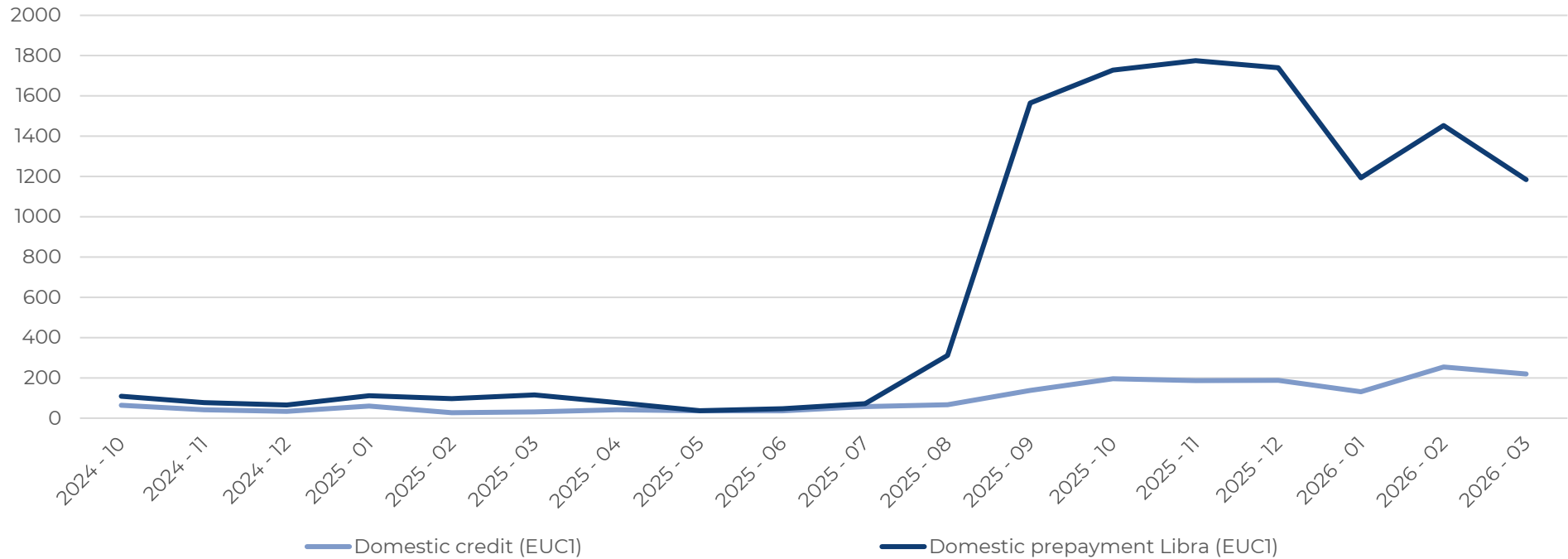
Quarter	2024 Q4	2025 Q1	2025 Q2	2025 Q3	2025 Q4	2026 Q1
No. of switches	635	539	398	2,341	5,975	4,571
Switching rate (%)	0.2%	0.2%	0.1%	0.7%	1.7%	1.3%

Data source: Phoenix Energy / FeDL / Evolve

<sup>15</sup> 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.

5.8 Greater Belfast is the only distribution area in which there is competition within the domestic credit and prepayment<sup>16</sup> 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 gains and switching rate per quarter.

**Figure 30: Gas - monthly domestic switches (G.Belfast)**



**Table 14: Switching rate - domestic market (G. Belfast only)**

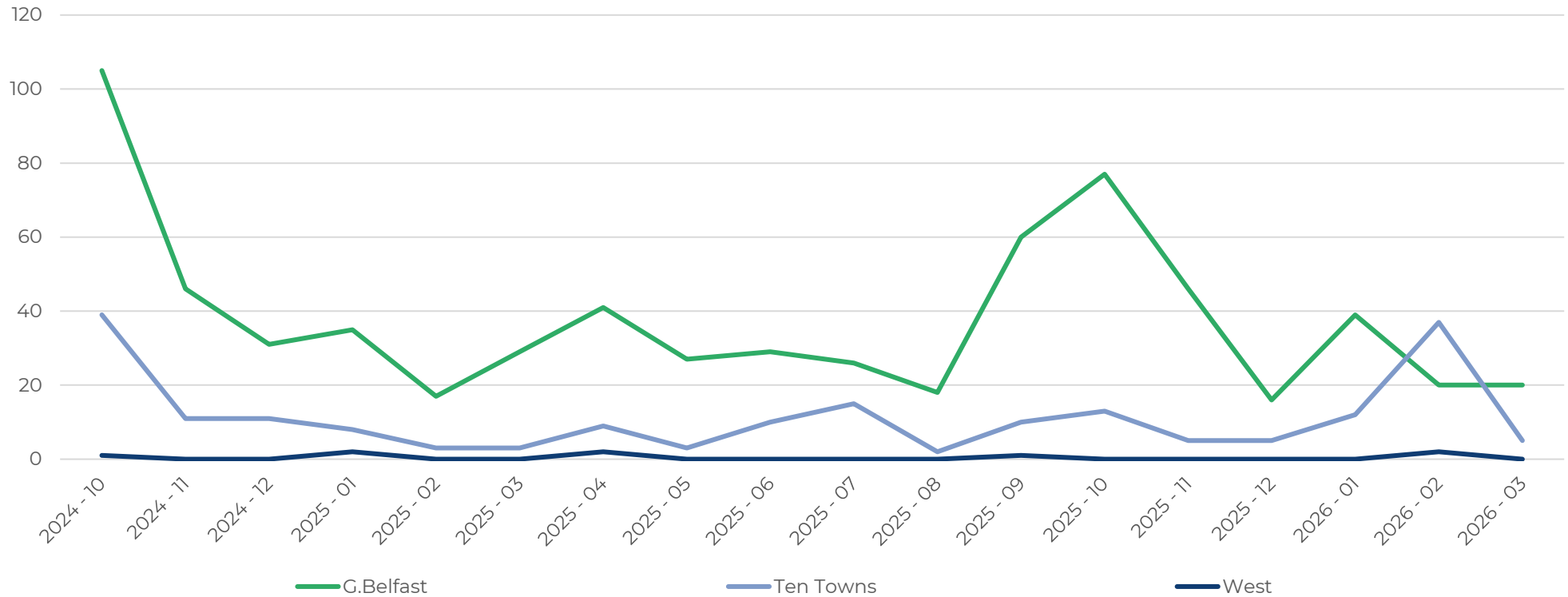
Quarter	2024 Q4	2025 Q1	2025 Q2	2025 Q3	2025 Q4	2026 Q1
<b>No. of switches</b>	391	442	277	2,209	5,813	4,436
<b>Switching rate (%)</b>	0.2%	0.2%	0.1%	0.9%	2.3%	1.8%

Data source: Phoenix Energy

<sup>16</sup> 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.

5.9 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 per quarter.

**Figure 31: Gas I&C switches by distribution licensed area**



**Table 15: Switching rate – I&C market**

Quarter	2024 Q4	2025 Q1	2025 Q2	2025 Q3	2025 Q4	2026 Q1
<b>No. of switches</b>	244	97	121	132	162	135
<b>Switching rate (%)</b>	1.6%	0.6%	0.8%	0.9%	1.1%	0.9%

Data source: Phoenix Energy / FeDL / Evolve



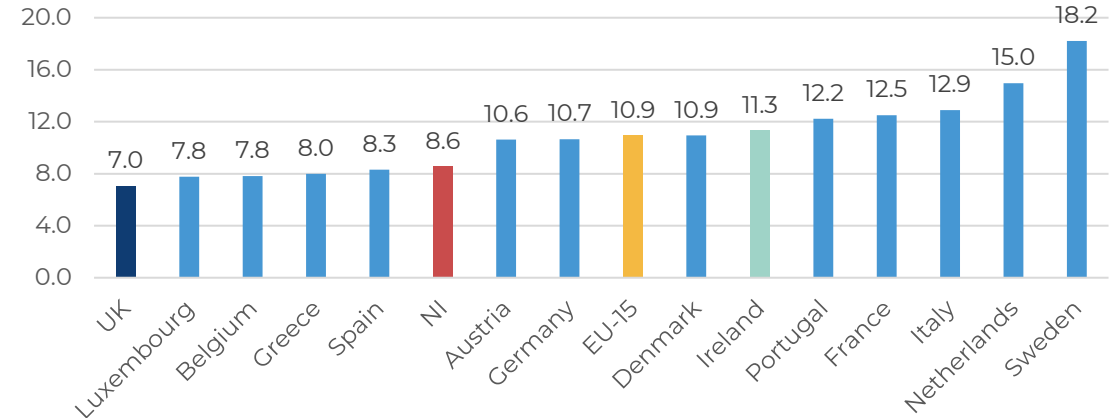
## 6. Gas pricing – semester 2 2025<sup>17</sup>

6.1 The pricing data detailed in this report is for the semester July – December 2025 (S2 2025). In the domestic graph 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.<sup>18</sup>

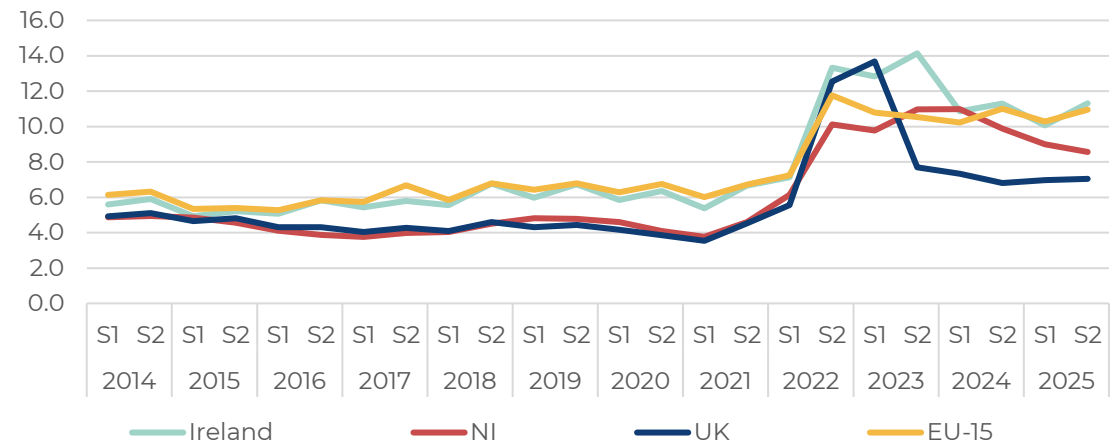
6.2 The NI unit price is the average pence per kWh for medium customers for the Greater Belfast, Ten Towns and West network areas. For semester 2 2025, the NI domestic gas prices were lower than Ireland and the EU Median but higher than the UK<sup>19</sup>.

6.3 The recently announced changes to Northern Ireland’s regulated tariffs are not reflected in this report due to the mismatch in time horizons.

**Figure 32<sup>20</sup>: Medium domestic connections unit prices incl. all Taxes (July - December 2025)**



**Figure 33: Medium domestic connections - unit price over time**



Data source: Eurostat, DESNZ and NI gas suppliers collated

<sup>17</sup> 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](#).

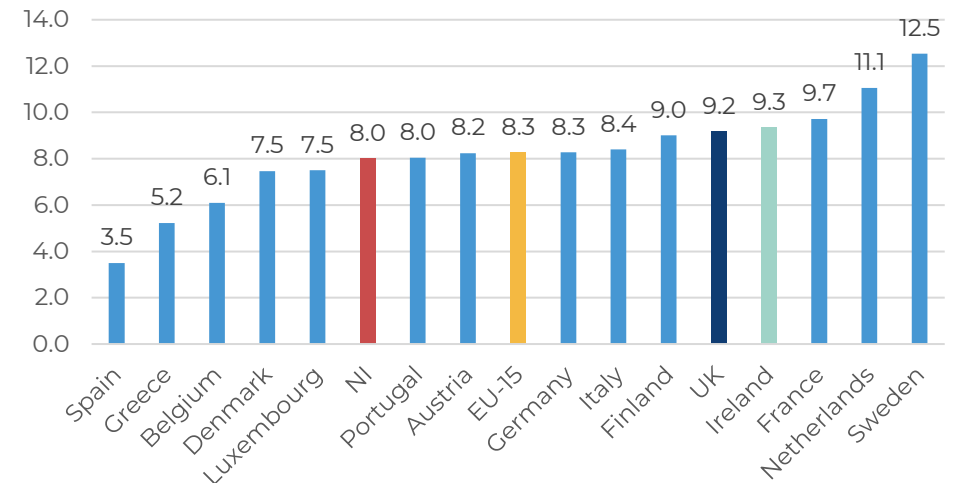
<sup>18</sup> The pricing data is accurate at the time of publication and covers July - December 2025, based on available sources and subject to revision.

<sup>19</sup> Please note: Data revised June 2026

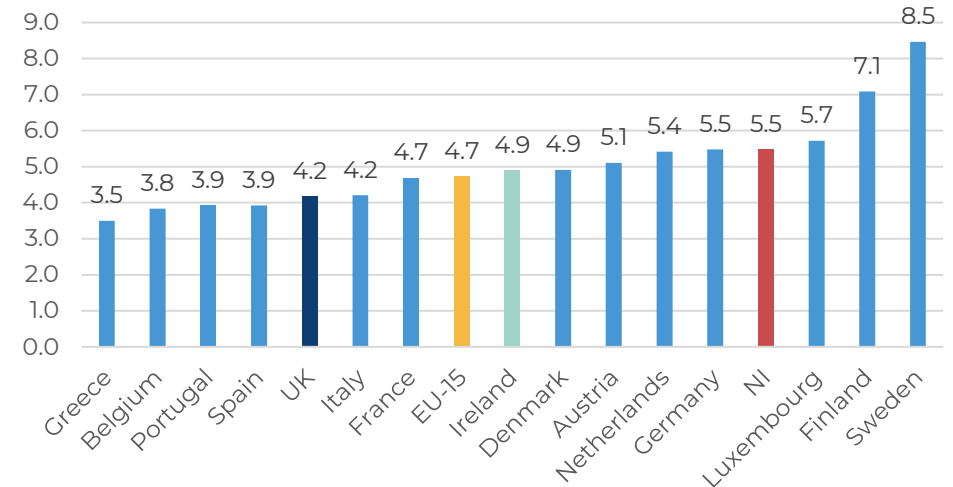
6.4 **I&C price comparison with EU:** The graphs below show I&C gas prices. Similar to the electricity prices above they use unit prices which include Climate Change Levy (CCL) but exclude VAT, as VAT is a refundable expense for many businesses. This reflects the final prices paid by I&C customers. We 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.

6.5 During semester 2 2025 (July - December), the NI prices in the very small I&C category were below the EU median, Ireland and the UK (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 the EU.

**Figure 34: Very small connections prices excl. VAT, incl. other taxes**

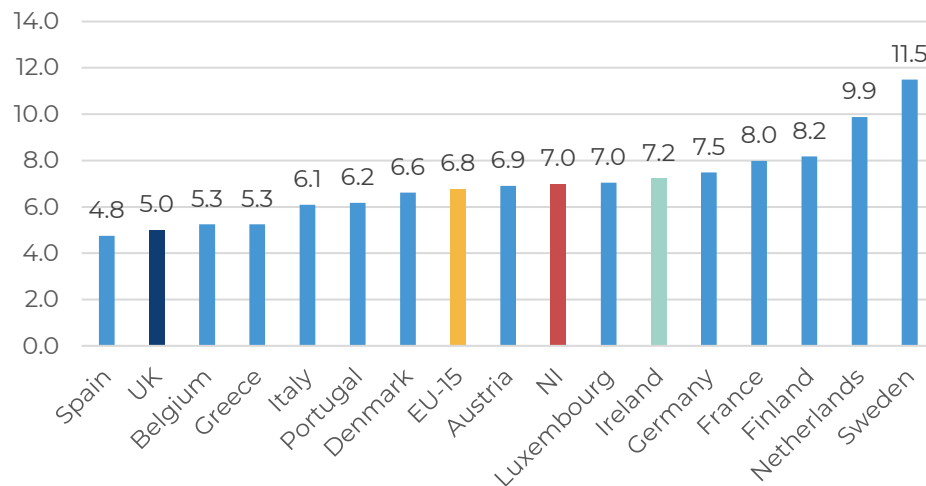


**Figure 36<sup>20</sup>: Medium and large connections prices excl. VAT, incl. other taxes**



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

**Figure 35<sup>20</sup>: Small connections prices excl. VAT, incl. other**



## Annex A: Background & Sources

### Purpose, methodology and data sources

The framework in which this quarterly 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 Energy Limited (Phoenix Energy), Kinecx Energy Limited 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<sup>20</sup> and Eurostat data base<sup>21</sup>) 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:

<sup>20</sup> <https://www.gov.uk/government/collections/quarterly-energy-prices>

<sup>21</sup> <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<sup>22</sup> and Eurostat data base<sup>23</sup>) 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<sup>24</sup> are prepared by the Market Monitoring Unit (MMU) within the UR in joint collaboration with the Commission for Regulation of Utilities (CRU).

<sup>22</sup> [www.gov.uk/government/collections/quarterly-energy-prices](http://www.gov.uk/government/collections/quarterly-energy-prices)

<sup>23</sup> <http://ec.europa.eu/eurostat/web/energy/data/database>

<sup>24</sup> 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<sup>25</sup> (DNOs) who operate in separate distribution areas as follows:

1. Kinecx Energy Ltd (formerly firmus energy (distribution) Ltd) from the North West through the Central region to the Southern areas of Northern Ireland;
2. Phoenix Energy Ltd (Phoenix Energy) 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.

## Contacts

For further information contact:

### Retail Energy Market Monitoring Inbox

Email: [REMM.Reporting@uregni.gov.uk](mailto:REMM.Reporting@uregni.gov.uk)

<sup>25</sup> [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		Gas: Greater Belfast <sup>26</sup>	
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	Domestic	Incumbent supplier since September 1996: SSE Airtricity <sup>27</sup>
		I&C	Incumbent supplier since September 1996: SSE Airtricity September 2008: firmus energy March 2009: Vayu (Naturgy as of 29 <sup>th</sup> November 2018) (Flogas Enterprise Solutions Ltd as of 20 <sup>th</sup> December 2021) May 2013: Electric Ireland August 2014: Go Power December 2014: Flogas
		Gas: Ten Towns <sup>28</sup>	
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 <sup>29</sup> July 2011: Budget Energy February 2012: VAYU (Naturgy as of 29 <sup>th</sup> November 2018) (Flogas Enterprise Solutions Ltd as of 20 <sup>th</sup> 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	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 29 <sup>th</sup> November 2018) (Flogas Enterprise Solutions Ltd as of 20 <sup>th</sup> December 2021) April 2017: Electric Ireland
		Gas: West <sup>30</sup>	
		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

<sup>26</sup> The Greater Belfast area is defined in Schedule 1 of the Phoenix Energy Limited conveyance licence.

<sup>27</sup> Formerly Phoenix Supply Ltd (PSL).

<sup>28</sup> The Ten Towns area is defined in Schedule 1 of the firmus energy (Distribution) Limited conveyance licence.

<sup>29</sup> Note that firmus supply left the electricity market at the end of 2015.

<sup>30</sup> The West area is defined in Schedule 1 of the SGN Evolve Network 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	Phoenix Energy	Phoenix Energy Limited
EU-15	Median value of the original 15 countries in the European Union including the UK.	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	SEM	Single Electricity Market
GB	Great Britain	SGN NG	Scotia Gas Network 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