

ANNUAL RETAIL ENERGY MARKET MONITORING REPORT

Period: 1 January to 31 December 2025

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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.



The graphic features a dark blue background with a green geometric shape in the top right corner. The Utility Regulator logo is in the top left. The content is organized into three columns: 'OUR MISSION' and 'OUR VISION' on the left, and 'OUR VALUES' on the right. Each section has a title in green and a description in white.

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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Northern Ireland Retail Market Monitoring 2025

Suppliers Electricity



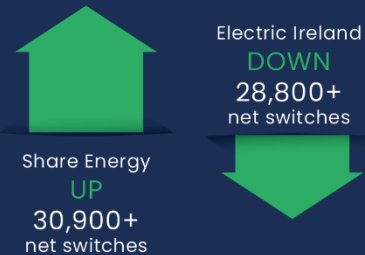
Suppliers Gas



Switching Data Electricity



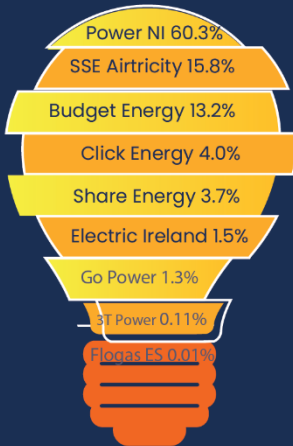
2025



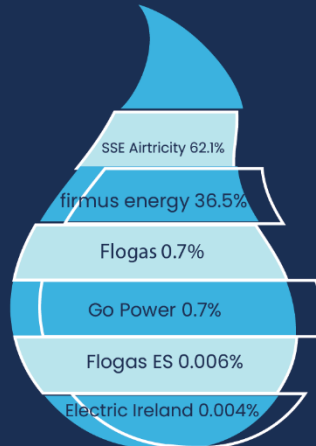
Switching Data Gas



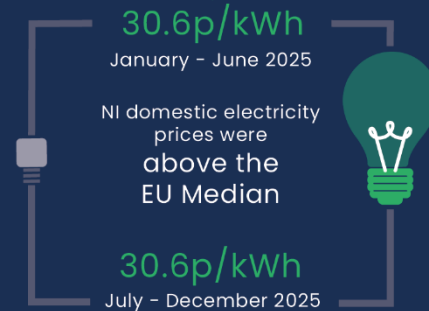
Total market share by connections Electricity



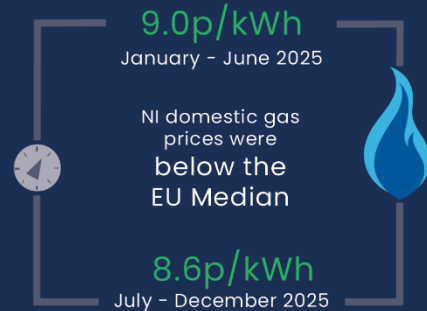
Total market share by connections Gas



Domestic pricing data Electricity



Domestic pricing data Gas



1. Key developments during 2025

1. Market activity in the electricity sectors shows that Power NI (the incumbent price-controlled electricity supplier) increased their market share during 2025 with 60.3% of connections compared to 59.9% in 2024.
2. Domestic electricity customers continue to engage in the market with over c112,000 customers switching supplier during 2025, representing an increase of 20% of switching in the domestic market (c93,000 in 2024). Electricity I&C switching activity also increased from c5,300 in 2024 to c6,000 in 2025.
3. In the gas sector, there was a significant increase (300%) in total switches during the year, with c9,253 total switches compared to c2,304 in 2024. This was split c8,741 domestic switches (domestic switching only applies to the Greater Belfast area) and c512 I&C switches.
4. The semester 2 (July to December) 2025 electricity pricing¹ data is sourced from Eurostat, DESNZ and individual supplier's submissions. The pricing data for the period illustrates the following: • NI domestic electricity prices (30.6 p/kWh) were below Ireland (35.2 p/kWh), similar to the UK (29.8 p/kWh), and above the EU median (23.4 p/kWh). • The NI I&C electricity price for the very small connections (which represent c71% 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 (c0.03% of connections) NI prices (17.8 p/kWh) were below the UK (22.6 p/kWh) but higher than Ireland (16.1 p/kWh) and the EU median (10.3 p/kWh).
5. The semester 2 (July – December) 2025 gas pricing¹ data is sourced from Eurostat, DESNZ and individual supplier's submissions. The pricing data for the period illustrates the following: • Domestic gas prices for NI (8.6 p/kWh) were below Ireland (11.3 p/kWh) and the EU (10.9 p/kWh). This was higher than the UK (7.0 p/kWh).

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 2025 pricing data, whereas our most recent comparison included in the latest tariff reviews is correct from 1 October 2025.

- The NI I&C gas price for the very small connections was 8.0 p/kWh which was below the UK (9.2 p/kWh), the EU median (8.3 p/kWh) and Ireland (9.3 p/kWh).
- For medium and large I&C customers NI gas prices (5.5 p/kWh) were higher than the UK (4.2p/kWh), EU median (4.7 p/kWh) and Ireland (4.9 p/kWh).

6. During 2025, there were c44,000 electricity complaints made by domestic and I&C customers and c52,900 gas complaints made by customers to their suppliers. This represents an increase for electricity complaints (c30,700 in 2024) but a decrease of c11,000 gas complaints during 2025. The most common supplier complaint made during 2025 related to bills, payments and accounts.

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 duties².

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 2025 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 2025

Total Electricity Connections

(end of Q4 2025)

930,697



853,829
Domestic Connections

Domestic Credit = 463,077
Domestic Prepayment = 390,752



76,868
I&C Connections

I&C <20 MWh = 54,827
I&C 20 - 49 MWh = 11,871
I&C 50 - 499 MWh = 9,107
I&C 500 - 1,999 MWh = 808
I&C 2,000 - 19,999 MWh = 235
I&C > 20,000 MWh = 20

Total Electricity Consumption

(2025)

7,272 GWh



2,713.5 GWh
Domestic Consumption

Domestic Credit = 1,549.0 GWh
Domestic Prepayment = 1,164.5 GWh



4,558.8 GWh
I&C Consumption

I&C <20 MWh = 296.4 GWh
I&C 20 - 49 MWh = 332.9 GWh
I&C 50 - 499 MWh = 1190.1 GWh
I&C 500 - 1,999 MWh = 799.5 GWh
I&C 2,000 - 19,999 MWh = 1,177.5 GWh
I&C > 20,000 MWh = 762.4 GWh

Total Electricity Complaints

44,446

Domestic Electricity Pricing

30.6 p/kWh

January - June 2025

30.6 p/kWh

July - December 2025

Total Electricity Switches

118,202

Total NI electricity market shares by connections

3.1 The chart⁷ to the right shows the percentage market share by connections⁸ for each electricity supplier at the **end of December 2025**.

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 60.3% share of the market.

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

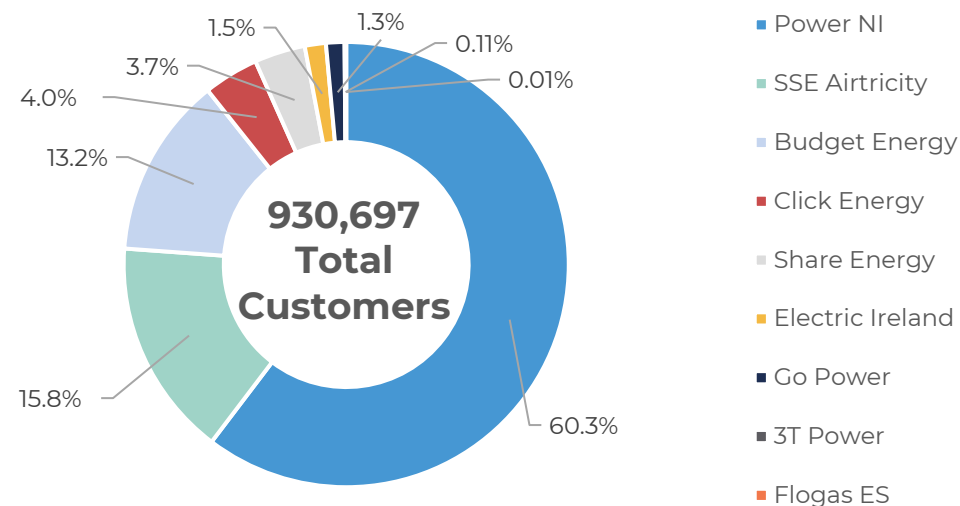


Table 1: Total electricity market share by connections

Market Segment	Power NI	SSE Airtricity	Budget Energy	Click Energy	Share Energy	Electric Ireland	Go Power	3T Power	Flogas ES	Total Customers
Domestic credit	317,742	89,647	23,902	12,027	18,374	56	1,329	0	0	463,077
Domestic prepayment	207,040	44,097	96,443	22,265	15,788	5,119	0	0	0	390,752
I&C < 20 MWh	29,023	9,378	1,486	1,621	125	5,306	7,366	491	31	54,827
I&C 20 – 49 MWh	4,473	2,517	422	637	32	1,574	1,994	215	7	11,871
I&C 50 – 499 MWh	2,967	1,377	194	693	43	1,879	1,666	246	42	9,107
I&C 500 – 1,999 MWh	263	116	0	24	2	246	106	28	23	808
I&C 2,000 – 19,999 MWh	88	22	0	8	0	91	19	1	6	235
I&C ≥ 20,000 MWh	1	5	0	0	0	12	2	0	0	20
Total	561,597	147,159	122,447	37,275	34,364	14,283	12,482	981	109	930,697

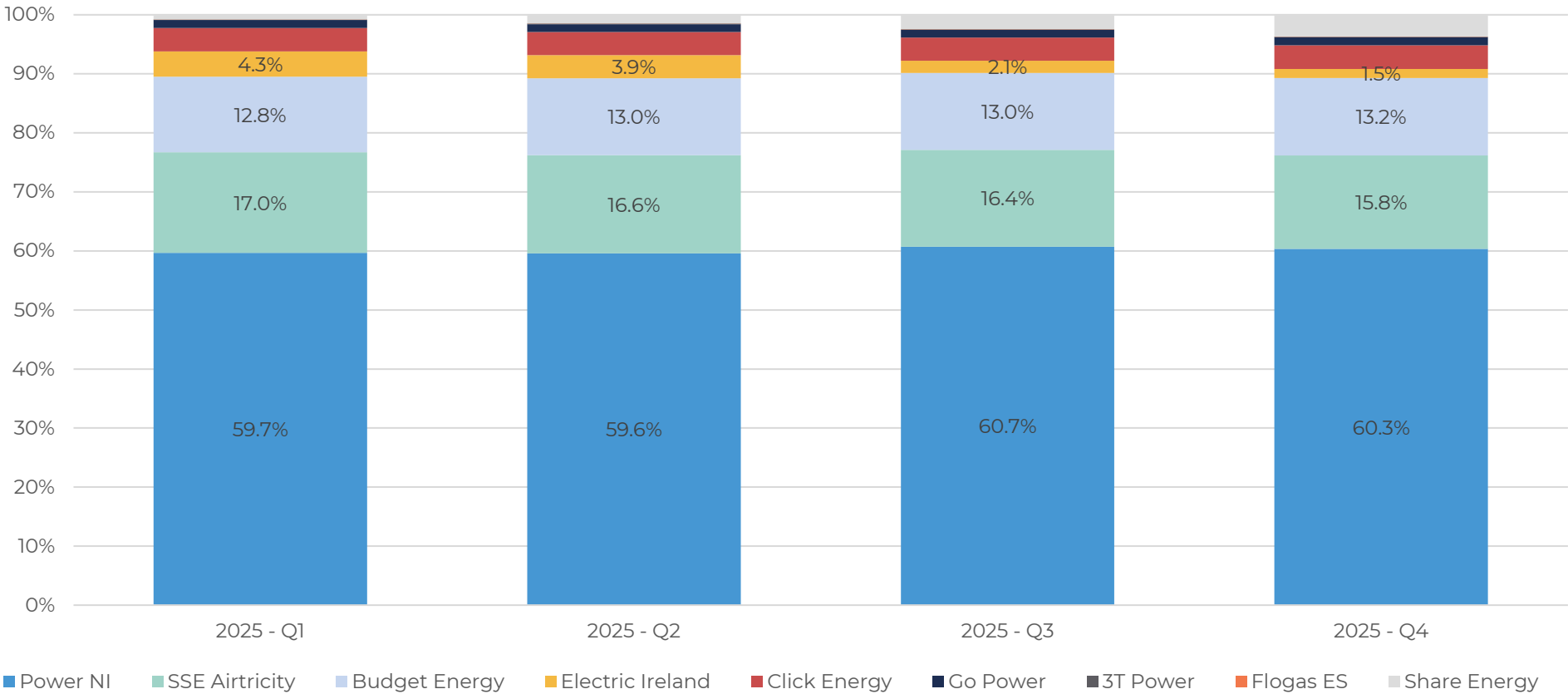
Data source: Northern Ireland Electricity Network (NIEN)

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.

3.3 The bar chart below shows the trends in the market shares (by customer numbers) for each active domestic and I&C supplier in NI for the four quarters of 2025.

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



Data source: NIEN

Total NI electricity market shares by consumption

3.4 The chart to the right shows the percentage market share by consumption for each electricity supplier for the period **January to December 2025**.

3.5 Electricity consumption in the NI retail market for 2025 was 7,272 GWh. Per customer type, domestic consumers consumed 2,714 GWh and non-domestic consumers 4,559 GWh during 2025.

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

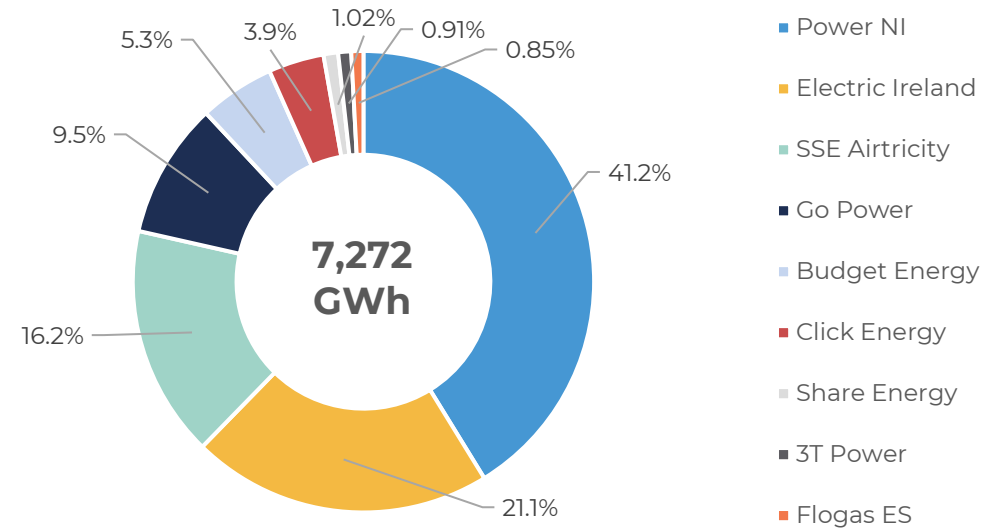


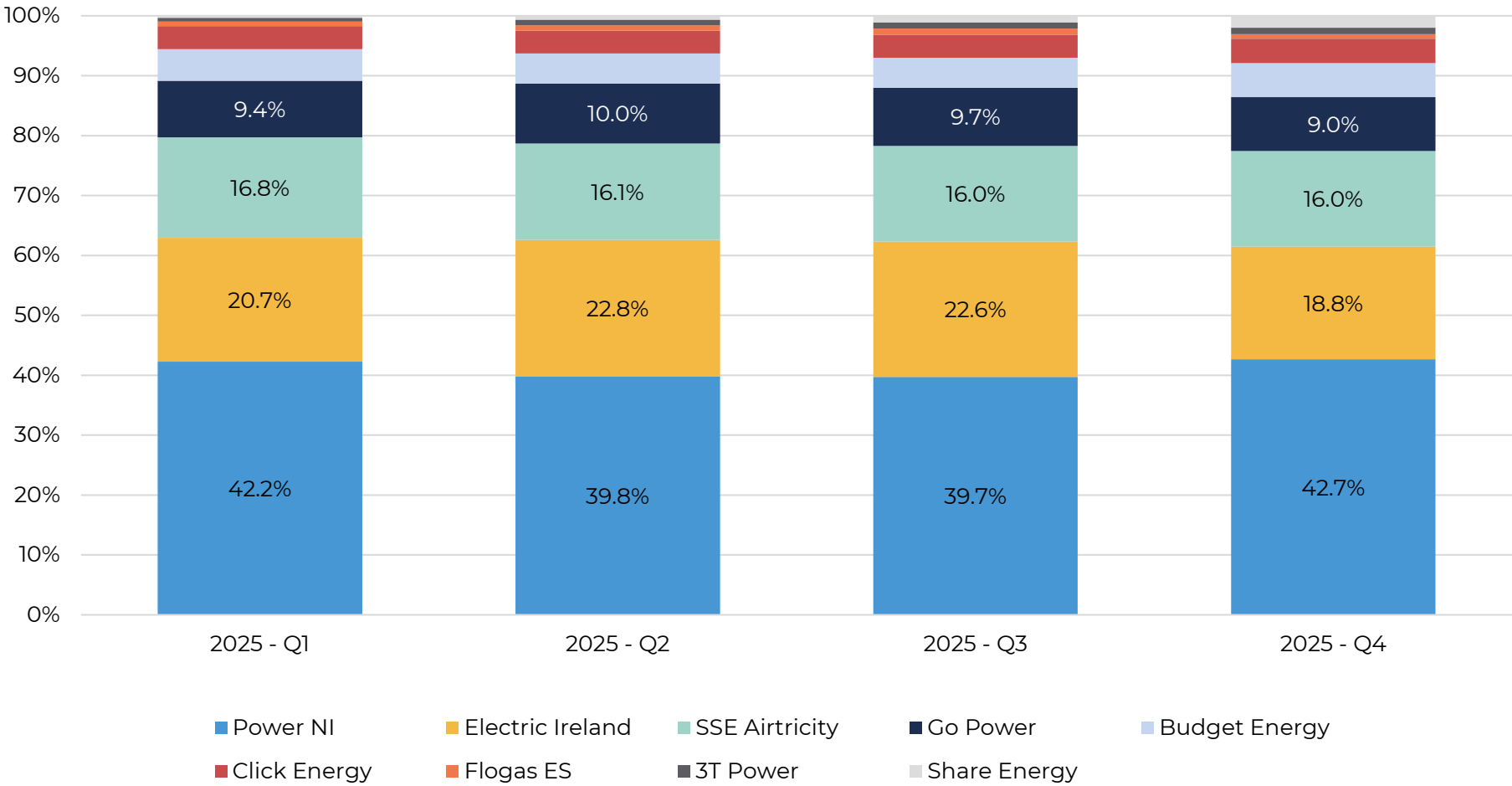
Table 2: Total electricity market share by consumption (GWh)

Market Segment	Power NI	Electric Ireland	SSE Airtricity	Go Power	Budget Energy	Click Energy	Flogas ES	3T Power	Share Energy	Total Consumption
Domestic credit	996	35	338	9	81	49	0	0	41	1,549
Domestic prepayment	640	27	117	0	276	76	0	0	28	1,165
I&C < 20 MWh	148	31	61	37	7	8	1	4	0	296
I&C 20 – 49 MWh	128	51	73	50	10	15	0	5	0	333
I&C 50 – 499 MWh	377	302	180	207	11	68	11	31	3	1,190
I&C 500 – 1,999 MWh	281	231	97	119	0	22	24	23	2	800
I&C 2,000 – 19,999 MWh	408	498	108	90	0	44	26	4	0	1,177
I&C ≥ 20,000 MWh	20	357	206	180	0	0	0	0	0	762
Total	2,998	1,534	1,180	691	384	283	62	66	74	7,272

Data source: NIEN

3.6 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 2025.

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



Data source: NIEN

Domestic electricity market analysis by connections

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

3.8 The non-incumbents now represent 38.5% of total domestic connections in NI.

Figure 5: Electricity domestic market share by connections

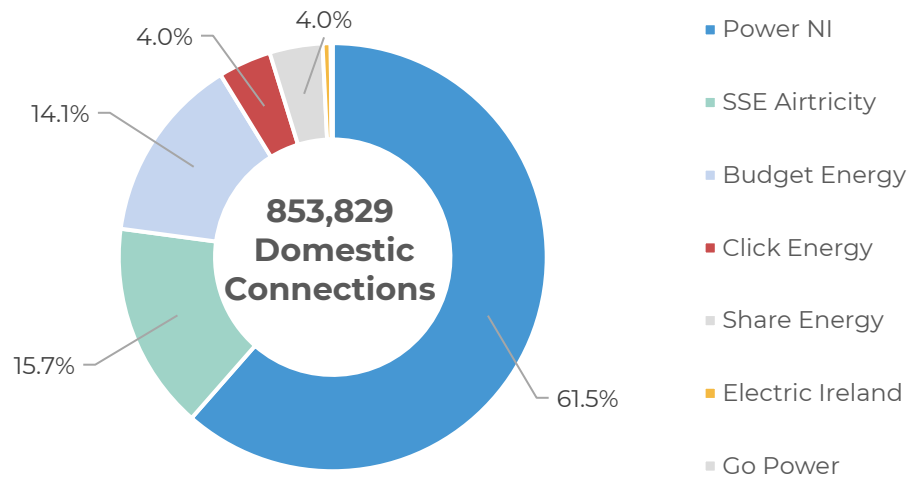


Figure 6: Electricity domestic market share by connections and market segment

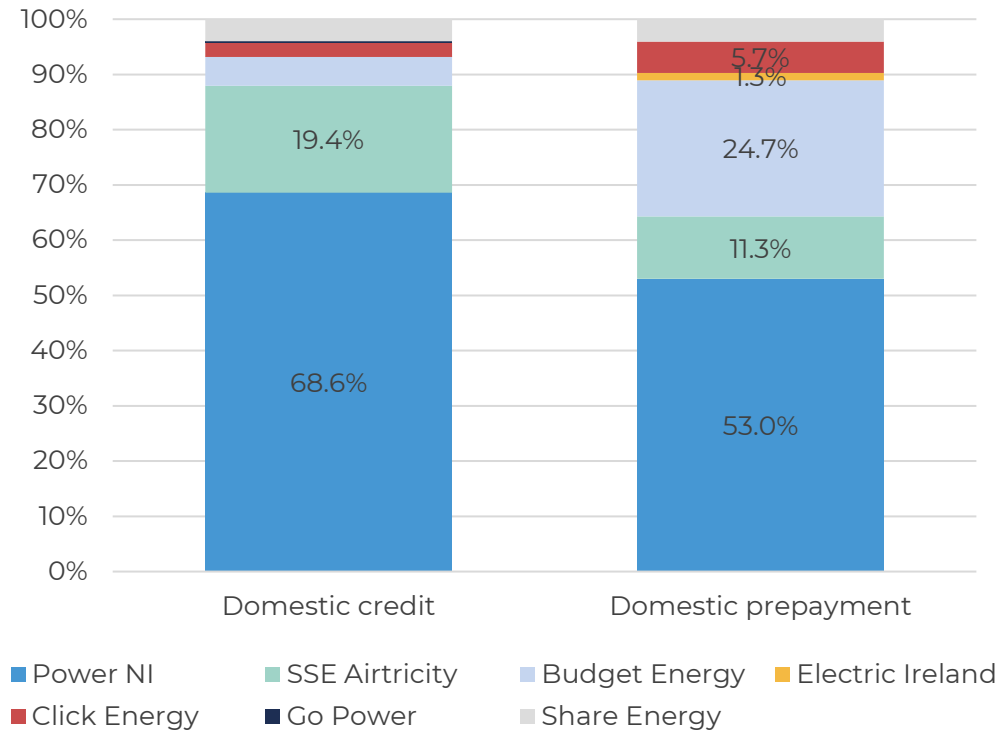


Table 3: Electricity domestic connections by market segment

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	207,040	39%	44,097	33%	96,443	80%	5,119	99%	22,265	65%	0	0%	15,788	46%	390,752	46%
Domestic credit	317,742	61%	89,647	67%	23,902	20%	56	1%	12,027	35%	1,329	100%	18,374	54%	463,077	54%
Total	524,782		133,744		120,345		5,175		34,292		1,329		34,162		853,829	

Data source: NIEN



I&C electricity market analysis by consumption

3.9 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 **4,559 GWh**.

Figure 7: Electricity I&C market share by consumption

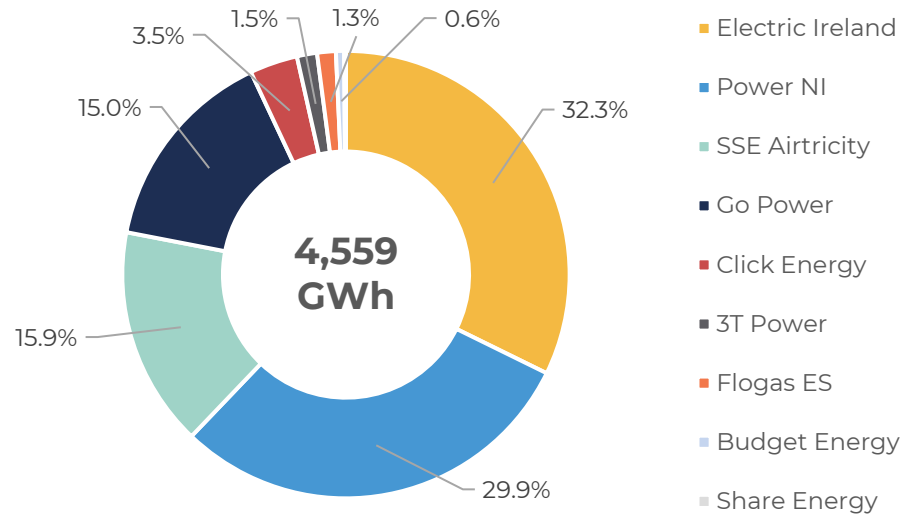


Figure 8: Electricity I&C market share by consumption and market segment

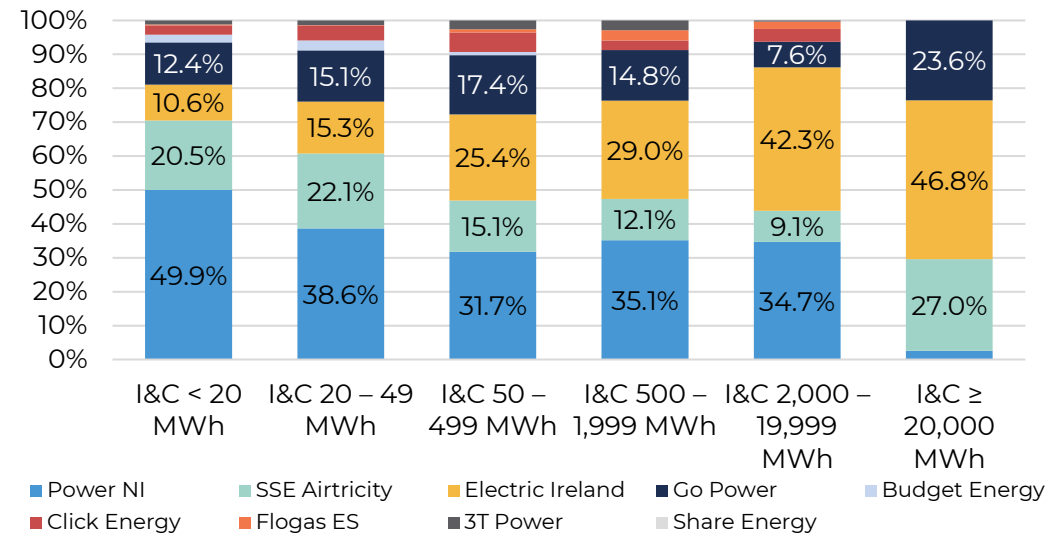


Table 4: Electricity I&C consumption by market segment

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	31.4	147.9	60.7	36.9	8.3	0.7	3.5	6.6	0.4	296.4
I&C 20 – 49 MWh	51.0	128.5	73.5	50.3	14.8	0.4	4.6	9.5	0.4	332.9
I&C 50 – 499 MWh	301.8	376.8	179.8	207.3	68.4	10.6	31.3	10.8	3.3	1,190.1
I&C 500 – 1,999 MWh	231.5	280.7	97.0	118.7	22.4	24.1	23.3	0.0	1.8	799.5
I&C 2,000 – 19,999 MWh	498.3	408.4	107.7	89.6	43.9	25.8	3.7	0.0	0.0	1,177.5
I&C ≥ 20,000 MWh	357.2	19.6	205.8	179.9	0.0	0.0	0.0	0.0	0.0	762.4
Total	1,471.1	1,361.8	724.6	682.6	157.9	61.5	66.3	26.9	5.9	4,558.8

Data source: NIEN

Electricity – new domestic and I&C connections

3.10 This section of the report provides an analysis of the electricity new domestic and I&C connections, for the four quarters of 2025.

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

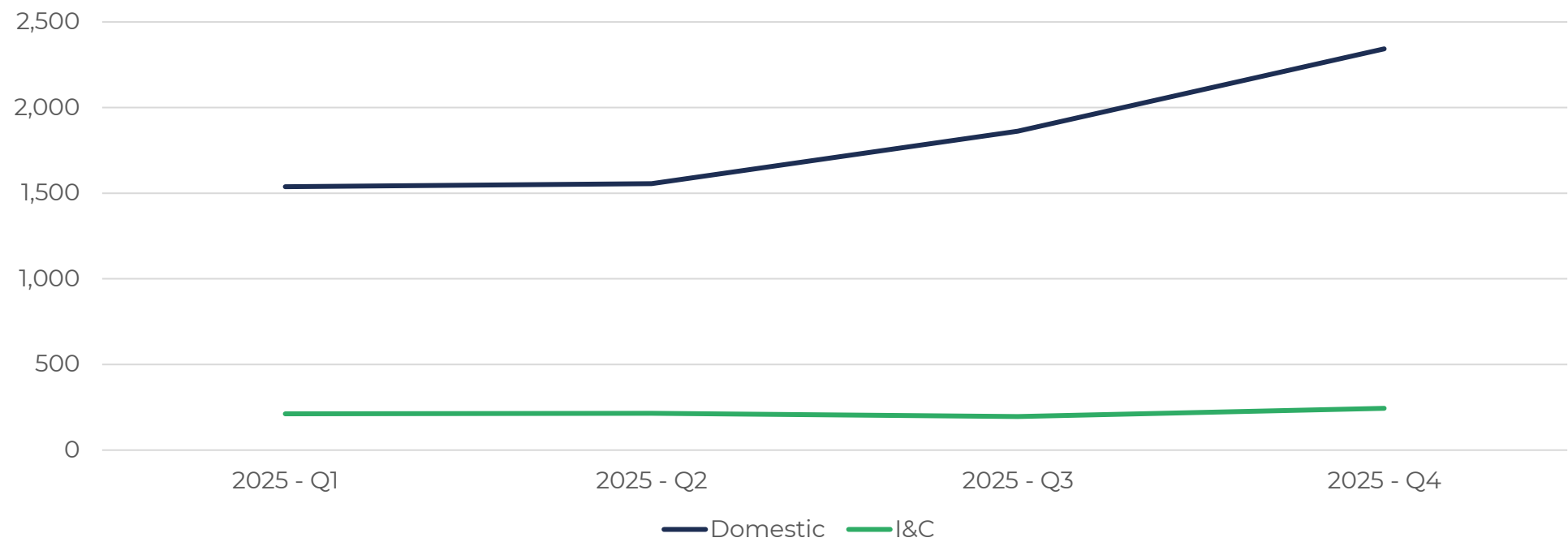


Table 5: Number of New Domestic and I&C Connections

Customer Type	2025 - Q1	2025 - Q2	2025 - Q3	2025 - Q4	Total
Domestic	1,538	1,556	1,863	2,343	7,300
I&C	212	215	196	244	867
Total	1,750	1,771	2,059	2,587	8,167

Data Source: NIEN

Electricity - Market activity - switching

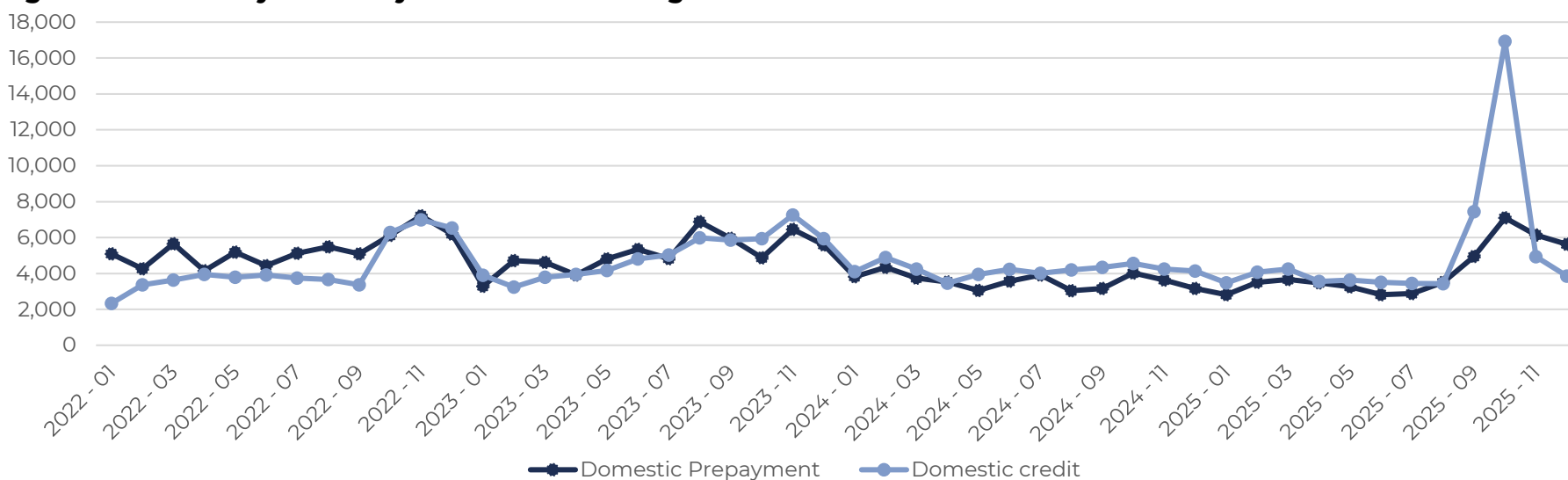
- 3.11 The table below shows the total market activity through changes of supplier (CoSs) on a quarterly basis for the domestic and I&C sectors including the quarterly switching rate⁹. The total number of switches in 2025 was 118,202, which is 19.9% higher than 2024 (98,609).

Table 6: Switching rate – total NI market

Quarter	2025 - Q1	2025 - Q2	2025 - Q3	2025 - Q4	Total
Number of Switches	22,897	21,747	27,430	46,128	118,202
Switching rate (%)	2.5%	2.3%	3.0%	5.0%	12.7%

- 3.12 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



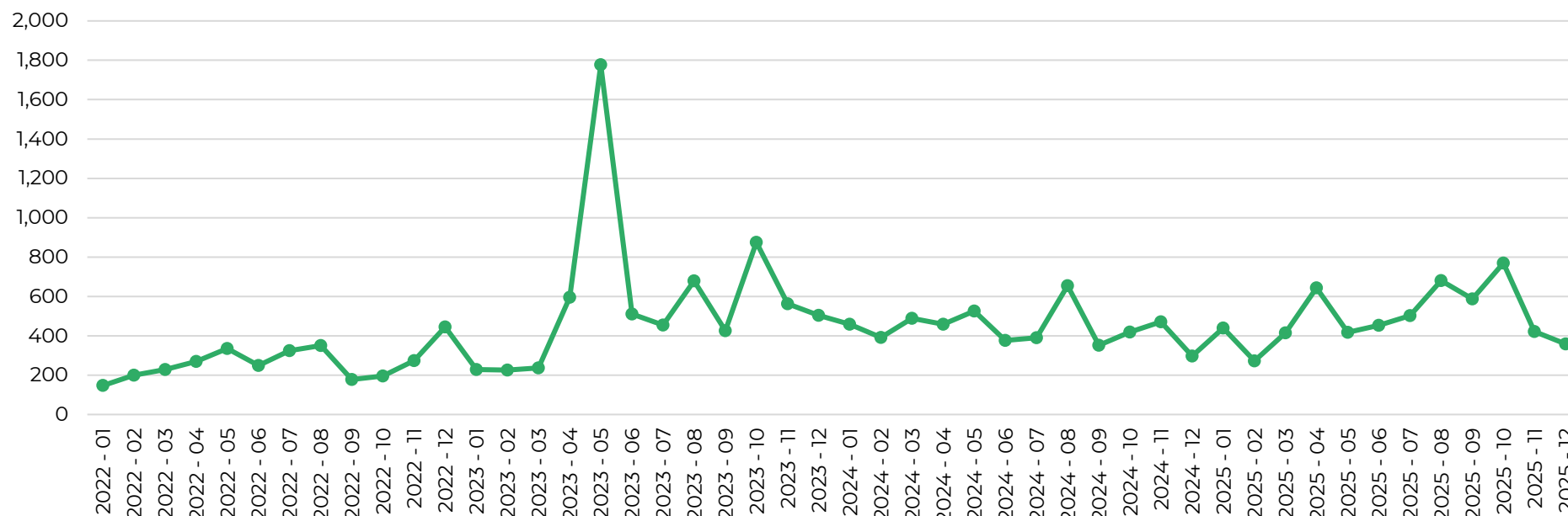
Data source: NIEN

⁹ 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 7: Switching rate – domestic market

Quarter	2025 - Q1	2025 - Q2	2025 - Q3	2025 - Q4	Total
Number of Switches	21,771	20,234	25,659	44,580	112,244
Switching rate (%)	2.6%	2.4%	3.0%	5.2%	13.1%

- 3.13 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 2025.

Figure 11: Electricity - monthly I&C switching**Table 8: Switching rate – I&C market**

Quarter	2025 - Q1	2025 - Q2	2025 - Q3	2025 - Q4	Total
Number of Switches	1,126	1,513	1,771	1,548	5,958
Switching rate (%)	1.5%	2.0%	2.3%	2.0%	7.8%

Data Source: NIEN

Electricity - Sticky customers

- 3.14 Within the REMM framework¹⁰ 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	404,004	47%
Switched 3+ years ago	200,402	23%
Switched in last 3 years	249,423	29%
Total	853,829	100%

Table 10: I&C sticky customers by connection

Market Activity	I&C Connections	%
Never Switched	31,620	41%
Switched 3+ years ago	27,095	35%
Switched in last 3 years	18,153	24%
Total	76,868	100%

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

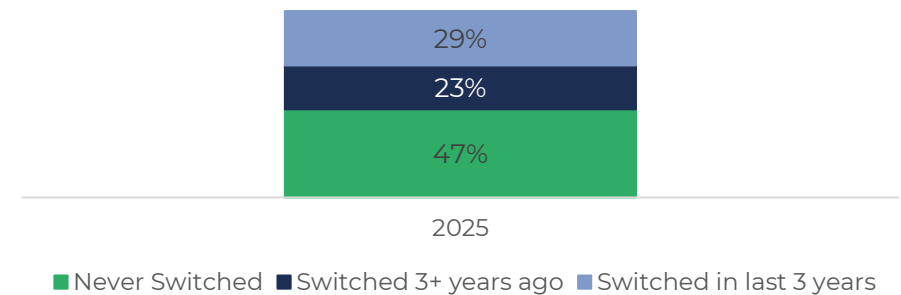
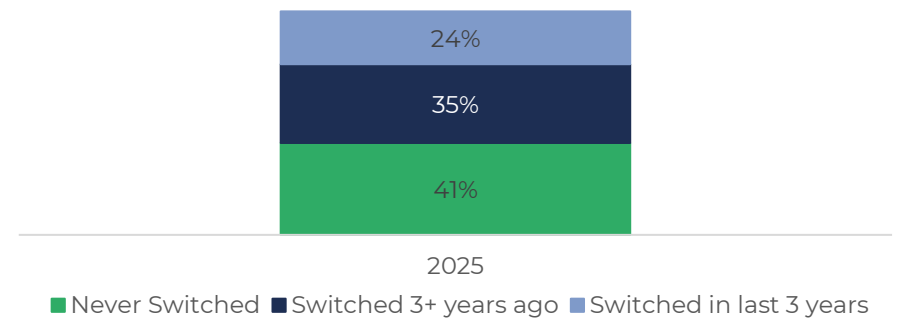


Figure 13: I&C sticky customers as percentage of total I&C connections



Data Source: NIEN

¹⁰ [2015 REMM Framework.pdf](#)

4. Electricity pricing¹¹ – 2025

- 4.1 **Domestic price comparison with EU:** In the domestic graphs shown, we use unit prices which 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) during semester 1 2025 (January – June) and Figure 15 shows the same information but for semester 2 2025 (July to December).
- 4.3 During 2025, the NI domestic price was higher than the EU-15 median, similar to the UK, and below the price for Ireland in semester 2.
- 4.4 The Semester 1 data for Ireland includes an element of ‘negative taxes’, reflecting subsidies and allowances introduced to reduce end consumer prices. Since 2022, domestic electricity customers have received €1500 worth of credits on their electricity cost, most recently €125 in January/February 2025. More information can be found [here](#).

Figure 14: Medium domestic connections unit prices incl. all taxes (January - June 2025)

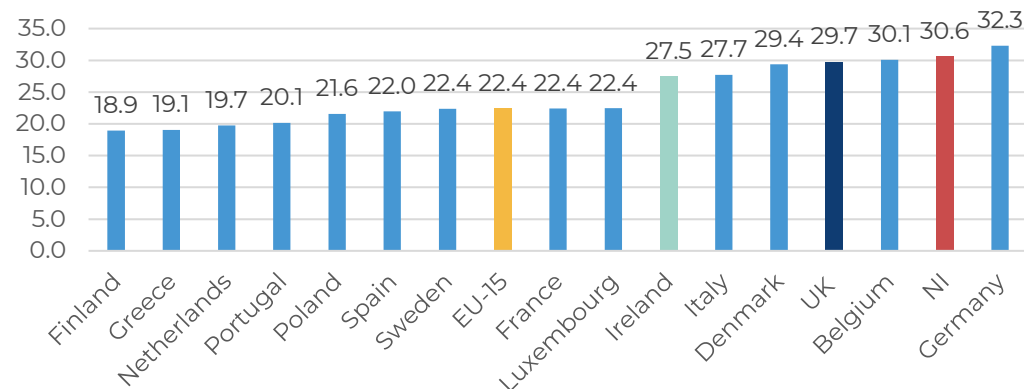
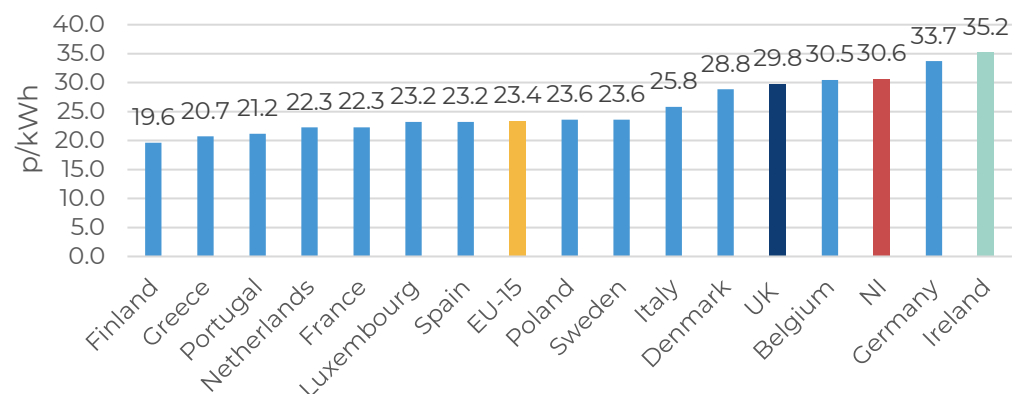


Figure 15: Medium domestic connections unit price incl. all taxes (July – December 2025)



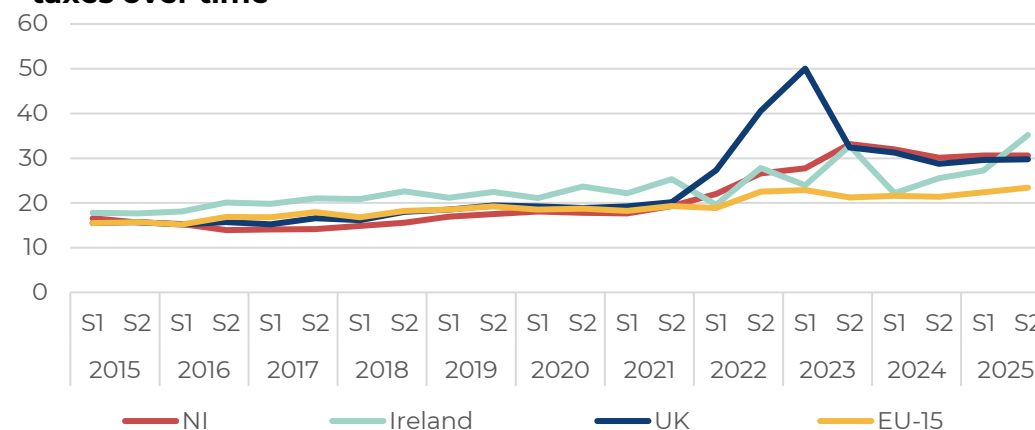
Data source: NI electricity suppliers, DESNZ, Eurostat and UR internal calculations

¹¹ 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 2025 pricing data, whereas our most recent comparison included in the latest tariff reviews is correct from 1 July 2026.

4.5 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.

4.6 Recent changes to regulated tariffs are not reflected in this report due to the mismatch in time horizons.

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



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

4.7 **I&C price comparison with EU¹²:** The graphs below show I&C electricity prices in the 15 EU¹³ 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.

4.8 During semester 1 2025 (Jan – June) the NI prices in the very small I&C category were lower than the UK but higher than Ireland and the EU median (c73.5% of I&C connections in NI are in this size category). During the same period, for the large and very large I&C customers (c0.03% of connections), NI prices were lower than the UK and Ireland, but higher than the EU median.

4.9 During semester 2 2025 (July – December) the NI prices in the very small I&C category were lower than the UK but higher than Ireland and 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 (c0.03% of connections), NI prices were lower than the UK, but higher than Ireland and the EU median.

¹² 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](#).

¹³ Some graphs do not include all 15 EU countries due to availability of data from Eurostat.

Table 11: I&C connections and consumption end of Q2 2025

Size of Customer	Annual Consumption bands (MWh)	% of I&C connections	% of I&C consumption	I&C connection numbers
Very small	< 20	72.9%	6.9%	55,944
Small	20 – 499	25.8%	32.3%	19,770
Small / Medium	500 – 1,999	1.0%	17.0%	793
Medium	2,000 – 19,999	0.3%	25.9%	239
Large & Very Large	>20,000	0.03%	17.9%	20

Table 12: 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
Very small	< 20	71.3%	5.1%	54,827
Small	20 – 499	27.3%	32.9%	20,978
Small / Medium	500 – 1,999	1.1%	19.1%	808
Medium	2,000 – 19,999	0.3%	26.8%	235
Large & Very Large	>20,000	0.03%	16.1%	20

Source: NIEN

Figure 17: Very small I&C connections unit prices excl. VAT, incl. other taxes (January - June 2025)

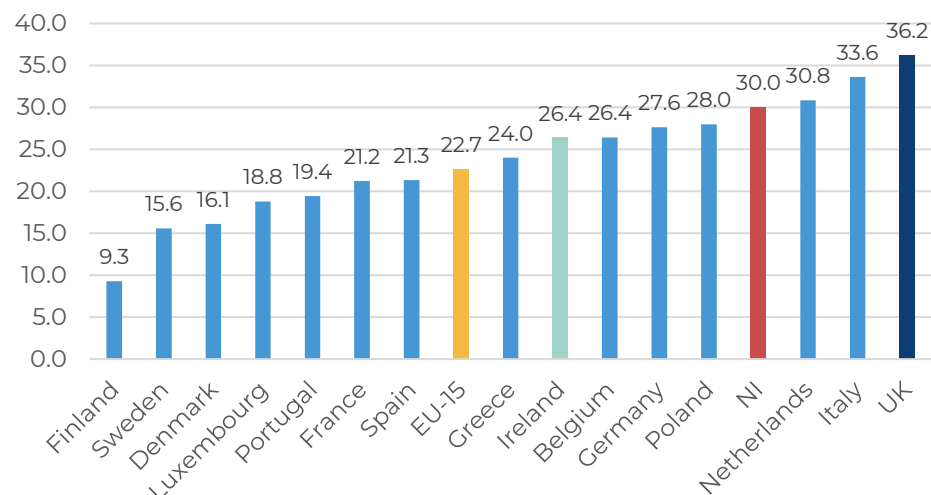


Figure 18: Very small I&C connections unit prices excl. VAT, incl. other taxes (July - December 2025)

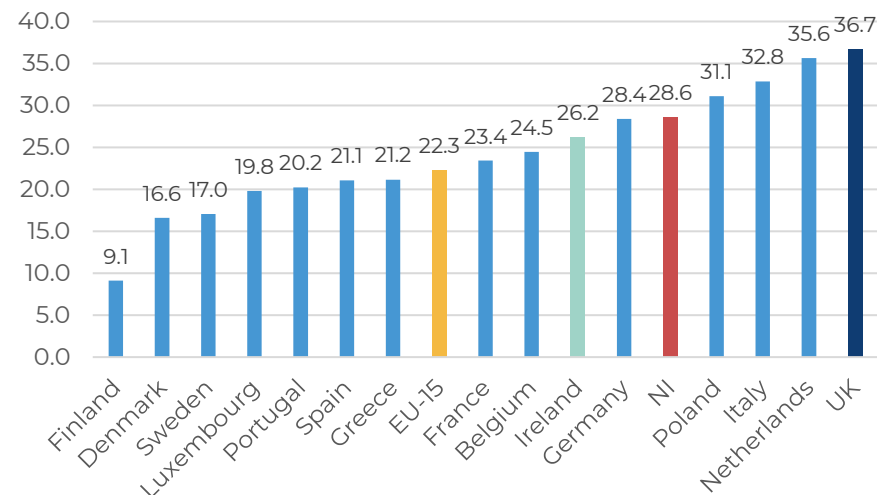


Figure 19: Small I&C connections unit prices excl. VAT, incl. other taxes (January - June 2025)

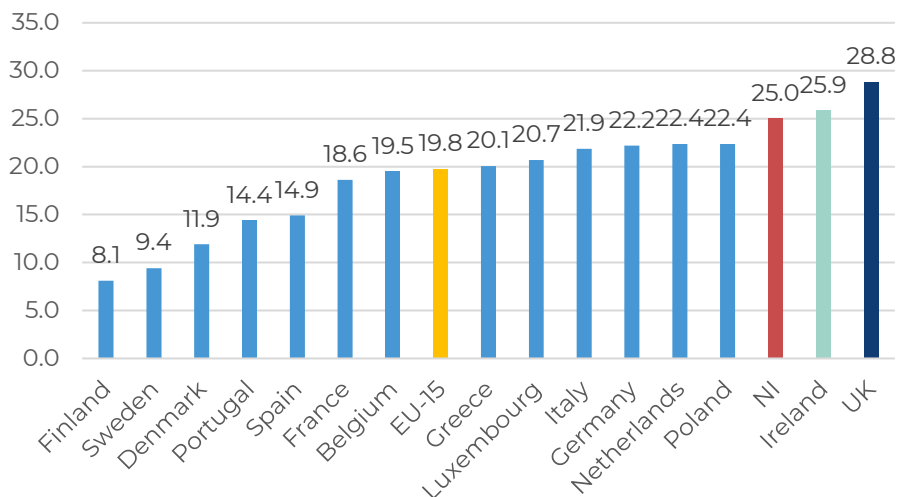
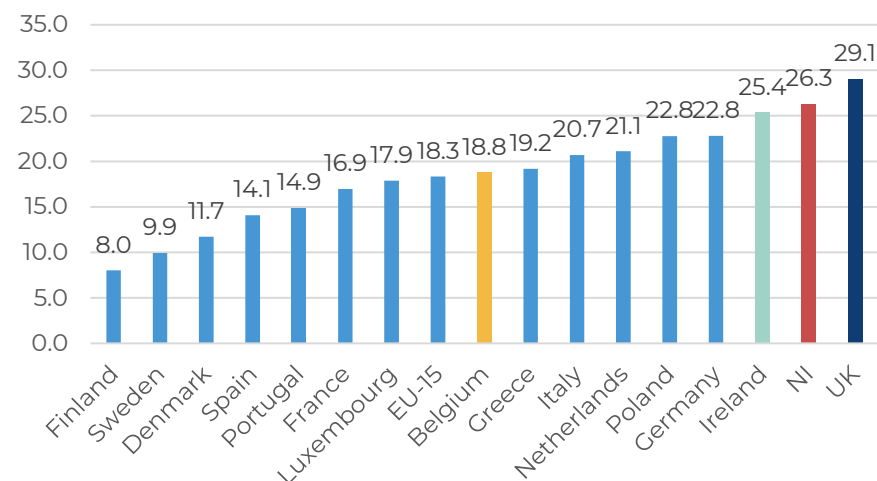


Figure 20: Small I&C connections unit prices excl. VAT, incl. other taxes (July - December 2025)



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

Figure 21: Small/Medium I&C connections unit prices excl. VAT, incl. other taxes (January - June 2025)

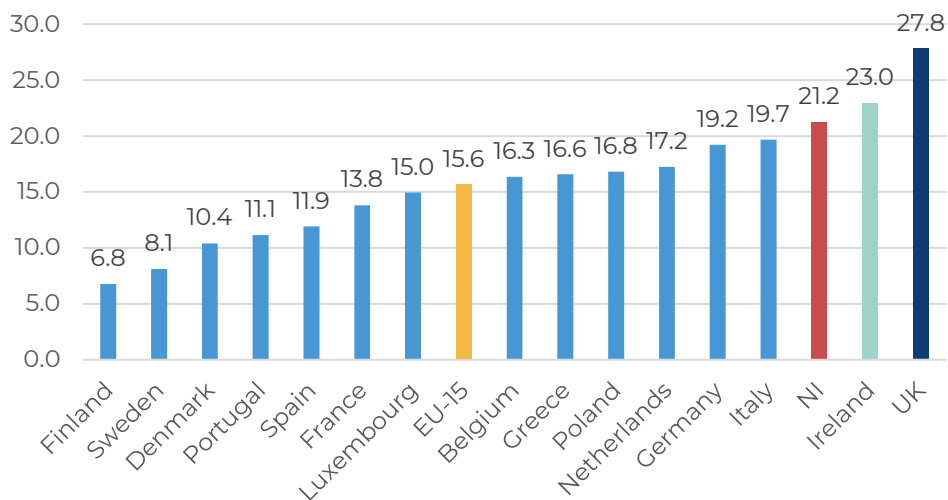


Figure 22: Small/Medium I&C connections unit prices excl. VAT, incl. other taxes (July - December 2025)

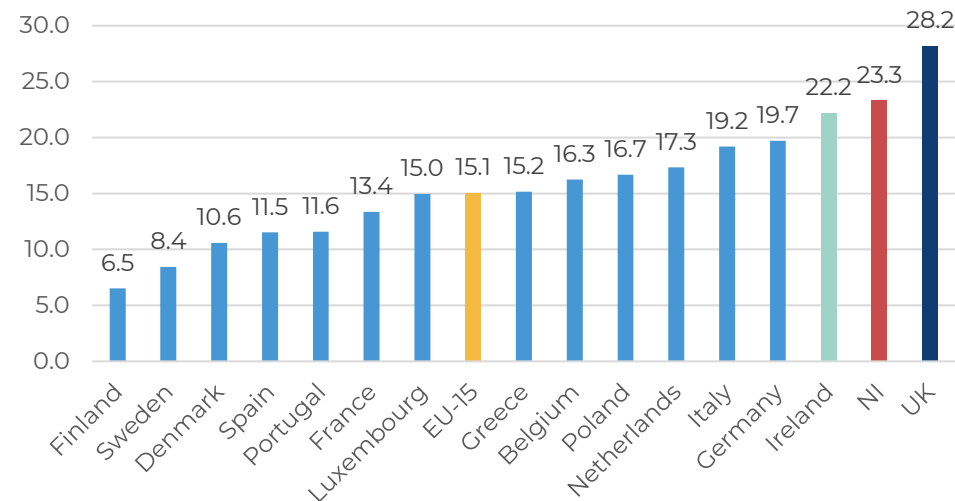


Figure 23: Medium I&C connections unit prices excl. VAT, incl. other taxes (January - June 2025)

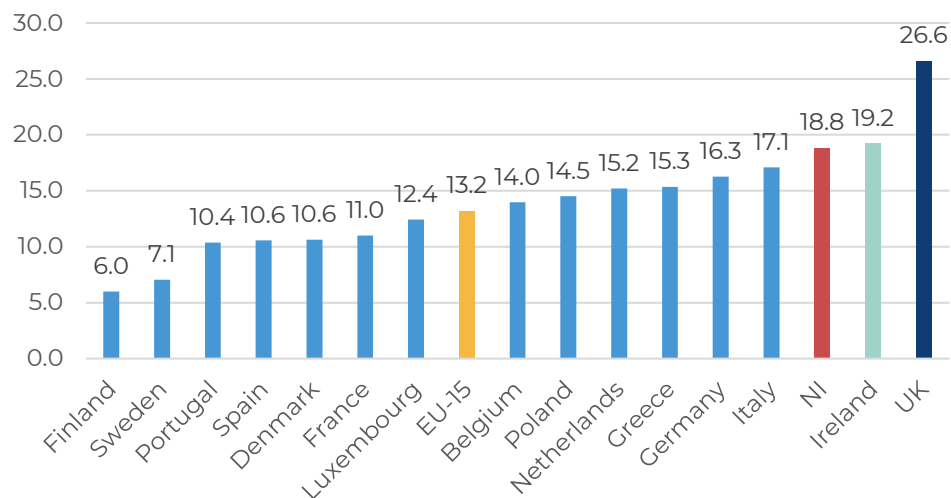
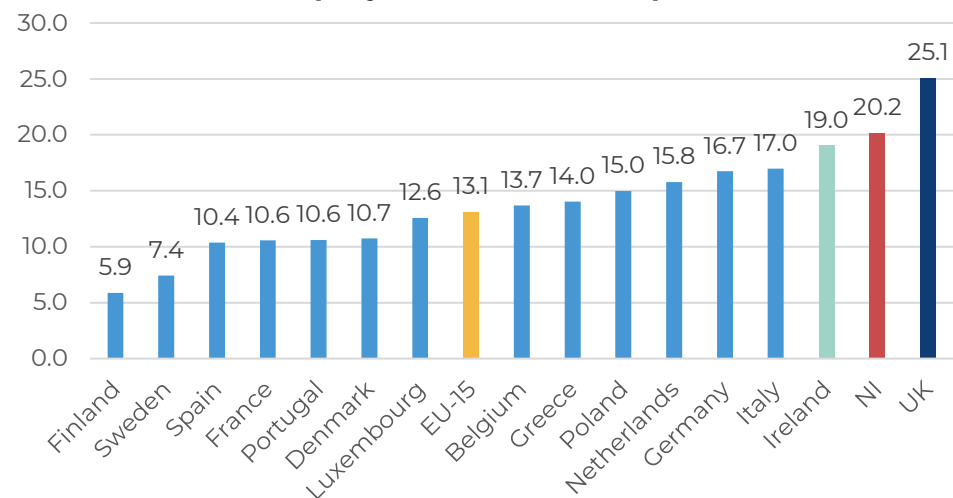


Figure 24: Medium I&C connections unit prices excl. VAT, incl. other taxes (July - December 2025)



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



Figure 25: Large + Very Large I&C connections unit prices excl. VAT, incl. other taxes (January - June 2025)

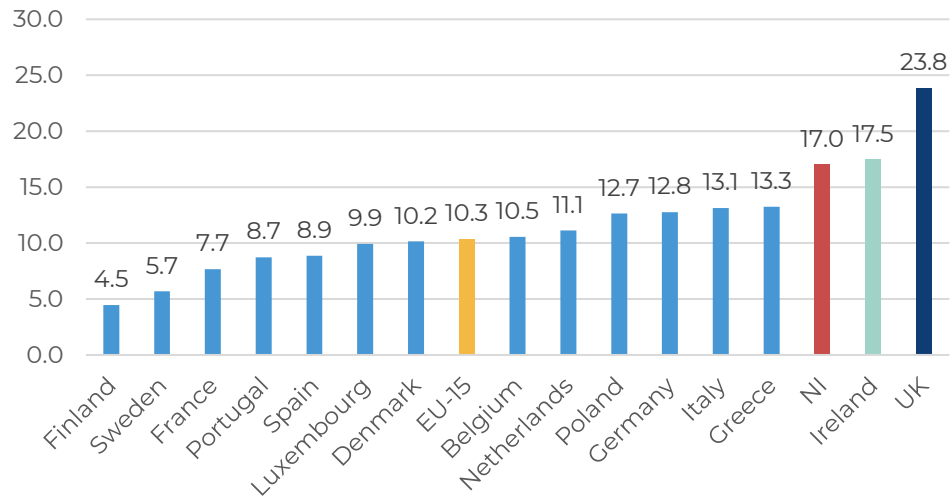
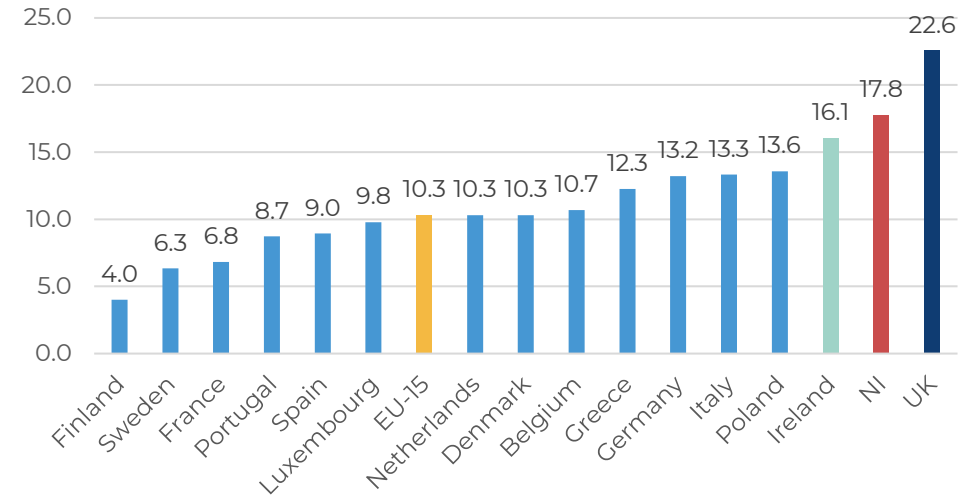


Figure 26: Large + Very Large I&C connections unit prices excl. VAT, incl. other taxes (July - December 2025)



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

4.10 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 time¹⁴

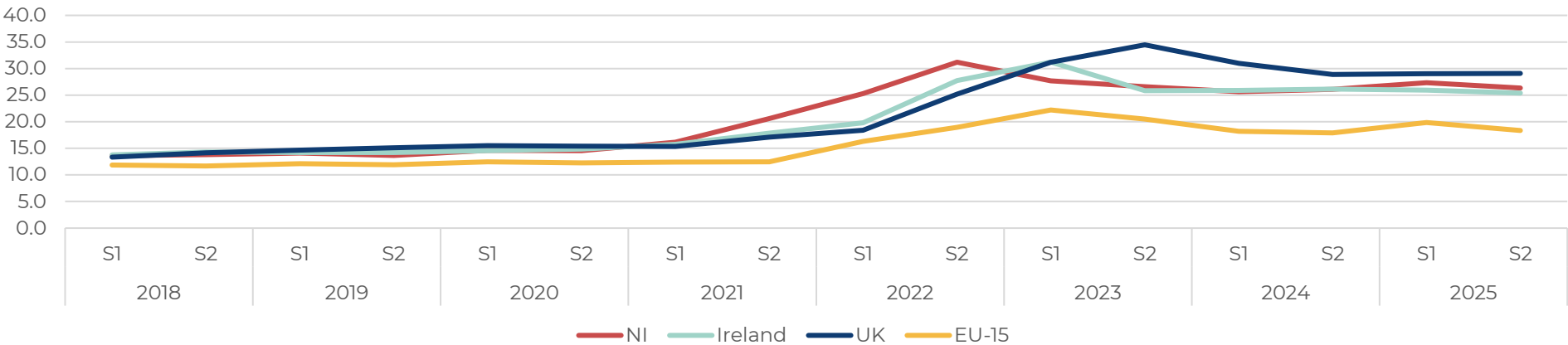
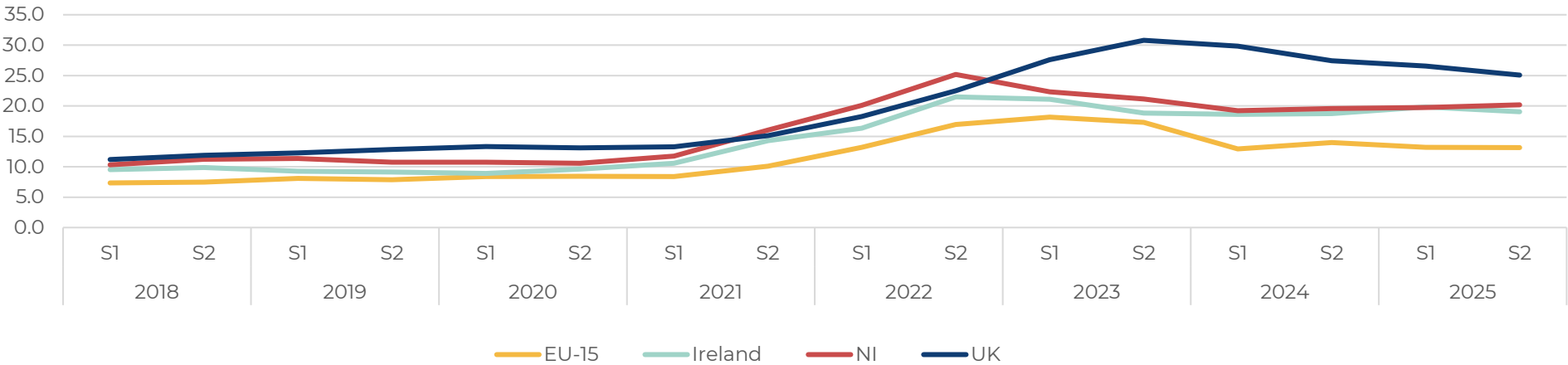


Figure 28: Medium I&C connections - unit price over time



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

5. Electricity supplier complaints

This section of the report provides readers with information in relation to electricity supplier complaints collated in 2025. The definition of a complaint is outlined in our Code of Practice minimum standards on Complaints Handling¹⁵. The complaints data is provided by electricity suppliers as per the REMM framework. The Consumer Council for Northern Ireland (CCNI) report on customer complaints¹⁶.

Total supplier Complaints

5.1 The table below shows the total number of complaints received by suppliers during 2025, 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 2025 for all customers. The total number of electricity complaints has increased from 30,672 in 2024 to 44,446 in 2025.

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	12,616	974	13,590
Customer Service	11,964	427	12,391
Debt issues, disconnections and reconnections	550	194	744
Network Company related	1,114	160	1,274
Prepayment meter issues	5,985	1	5,986
Selling/marketing - doorstep and face-to-face	333	17	350
Selling/marketing - other	5,150	26	5,176
Switching	2,729	65	2,794
Tariffs	1,523	152	1,675
Other	400	66	466
Total	42,364	2,082	44,446

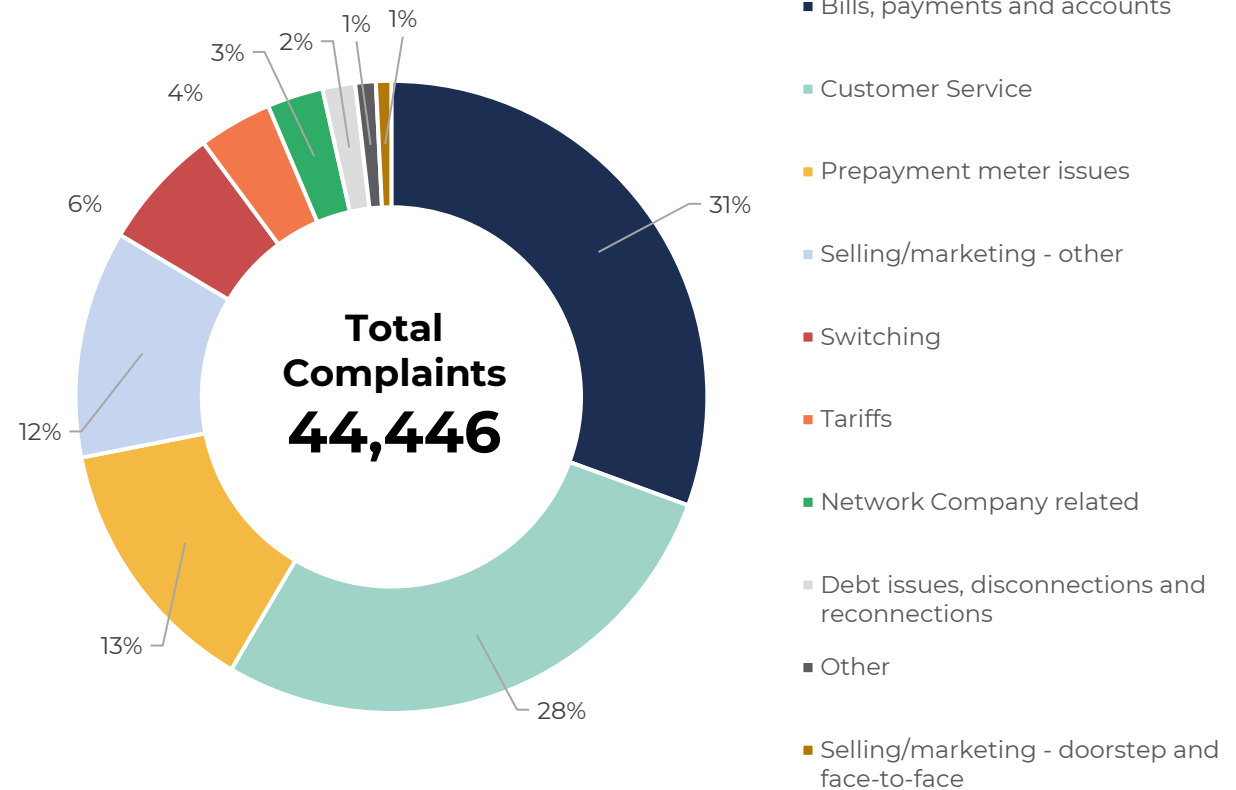
Source: NI electricity suppliers

¹⁵ 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 \(June 2015\)](#).

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

5.3 The three most common electricity supplier complaints made during 2025 related to: bills, payments and accounts (31%), customer service (28%), and Prepayment meter issues (13%). While similar to the complaints profile for 2024 (although percentages vary) selling and marketing-other complaints was replaced by replaced prepayment meter complaints in third place.

Figure 29: Total electricity complaints by type



Source: NI electricity suppliers

6. Gas

Gas 2025

Total Gas Connections

344,054

Total Gas Consumption

6,953,404 MWh

West
Connections
5,251
Consumption
842,560 MWh



G. Belfast
Connections
261,763
Consumption
4,205,895 MWh

Ten Towns
Connections
77,040

Consumption
1,904,950 MWh

Total Gas Complaints

52,895

Domestic Gas Pricing

9.0 p/kWh

January - June 2025

8.6 p/kWh

July - December 2025

Total Gas Switches

9,253

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 connections¹⁷ are as at the **end of December 2025**.

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

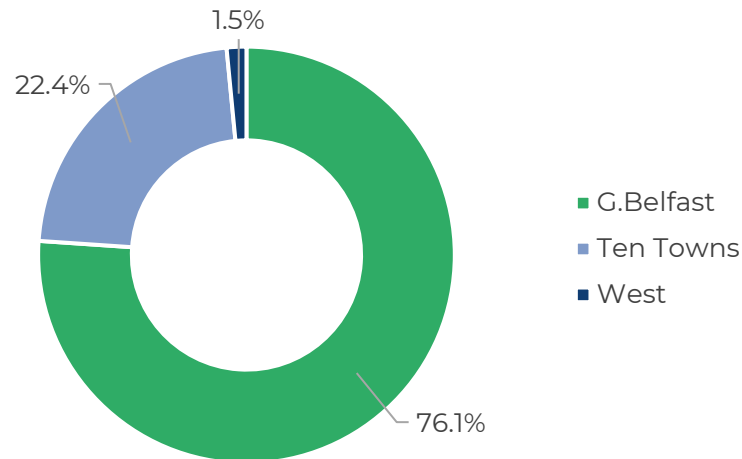


Figure 31: Gas market share by supplier by connections

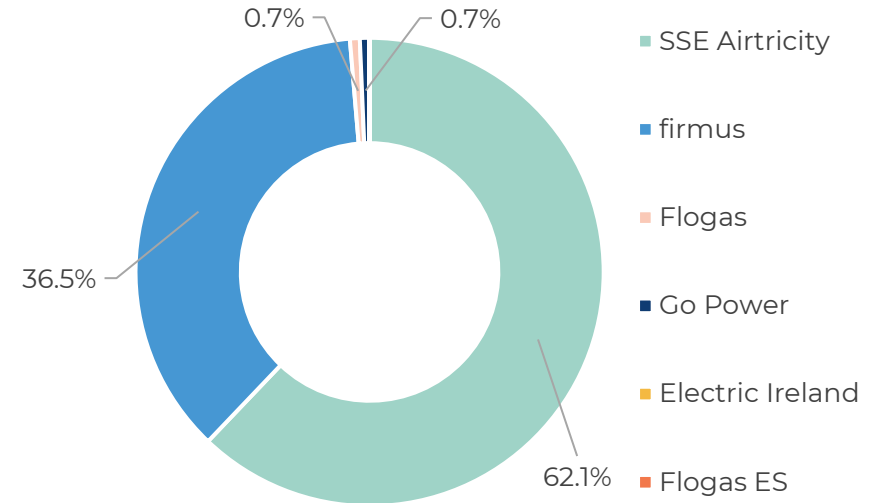


Table 14: Gas market share by connections

Distribution License Area	Market Segment	SSE Airtricity	firmus	Flogas	Go Power	Flogas ES	Electric Ireland	Total Connections
G.Belfast	Domestic Only	203,001	47,065	2	6	0	0	250,074
G.Belfast	I&C Only	5,533	2,657	1,725	1,752	16	6	11,689
Ten Towns	Domestic Only	0	73,865	0	0	0	0	73,865
Ten Towns	I&C Only	91	2,018	580	475	6	5	3,175
West	Domestic Only	5,101	0	0	0	0	0	5,101
West	I&C Only	24	64	32	28	0	2	150
Total		213,750	125,669	2,339	2,261	22	13	344,054

Data source: PNGL / FeDL / Evolve

¹⁷ 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

6.2 The pie chart below shows the total gas consumption in NI for the period **January to December 2025**, with a breakdown by distribution area. Total consumption for the period was **6,953,404 MWh**.

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

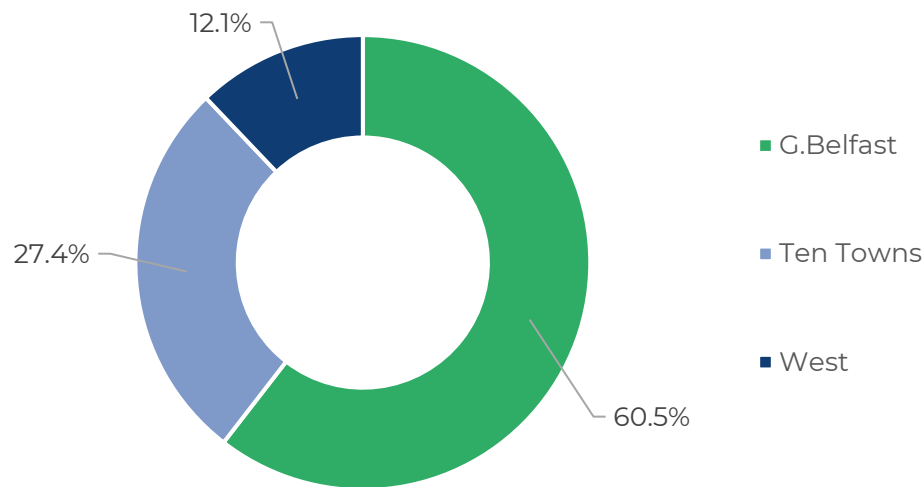


Figure 33: Gas market share by supplier by consumption

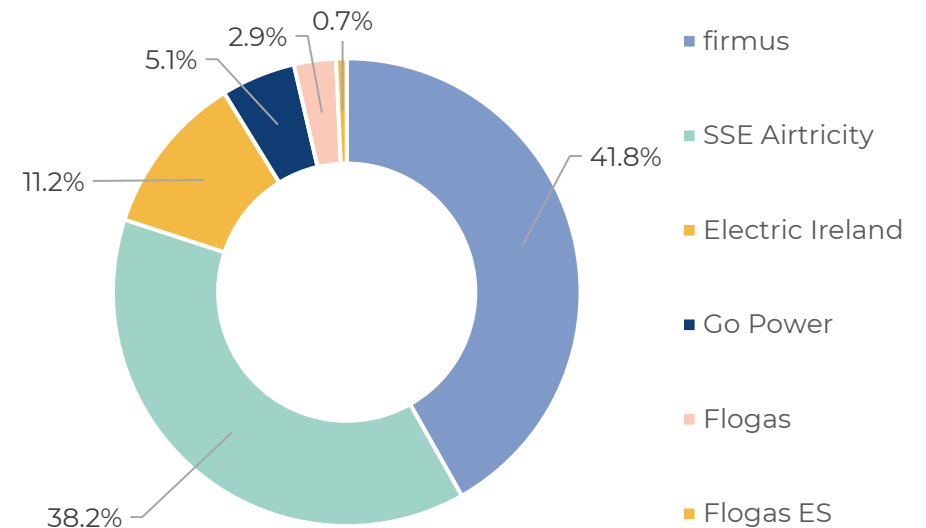


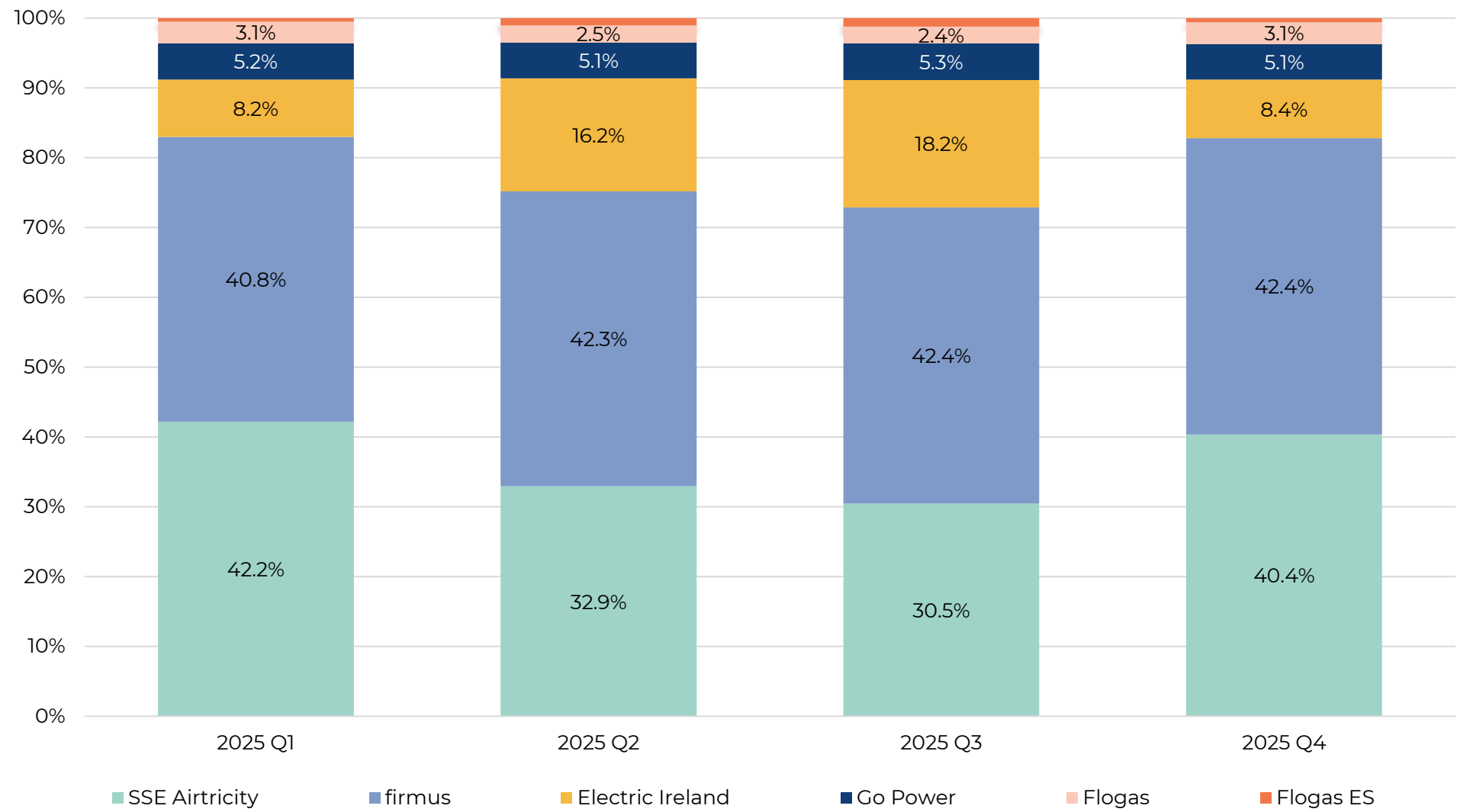
Table 15: Gas market share by consumption (MWh)

Distribution Licensed Area	SSE Airtricity	firmus	Electric Ireland	Go Power	Flogas	Flogas ES	Total Consumption
G.Belfast	2,244,983	1,366,342	180,635	239,726	140,635	33,573	4,205,895
Ten Towns	209,867	1,405,904	106,976	112,403	52,498	17,302	1,904,950
West	202,441	135,058	490,858	5,311	8,891	0	842,560
Total	2,657,292	2,907,304	778,469	357,440	202,025	50,875	6,953,404

Data source: PNGL / FeDL / Evolve

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 2025.

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



Data source: PNGL / FeDL / Evolve

[DATA DOWNLOAD](#)

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**¹⁸, by connections as at the end of December 2025.

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

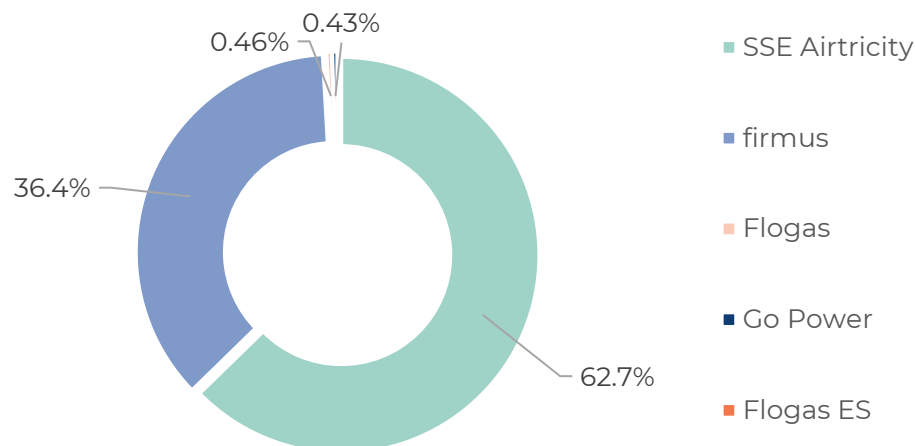


Figure 36: Domestic and small I&C connections by market segment

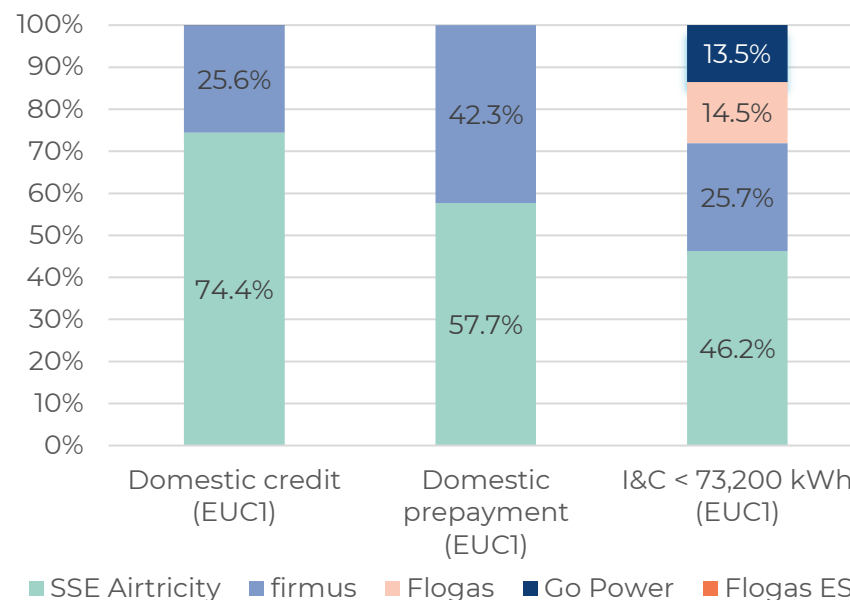


Table 16: Domestic and small I&C analysis by connections

Distribution Licensed Area	Market Segment	SSE Airtricity	firmus	Flogas	Go Power	Flogas ES	Total Connections
G.Belfast	Domestic credit (EUC1)	80,201	11,144	2	6	0	91,353
G.Belfast	Domestic prepayment (EUC1)	122,800	35,921	0	0	0	158,721
G.Belfast	I&C < 73,200 kWh (EUC1)	4,970	1,477	1,162	1,166	0	8,775
Ten Towns	Domestic credit (EUC1)	0	16,909	0	0	0	16,909
Ten Towns	Domestic prepayment (EUC1)	0	56,956	0	0	0	56,956
Ten Towns	I&C < 73,200 kWh (EUC1)	9	1,272	389	277	0	1,947
West	Domestic credit (EUC1)	1,377	0	0	0	0	1,377
West	Domestic prepayment (EUC1)	3,724	0	0	0	0	3,724
West	I&C < 73,200 kWh (EUC1)	16	27	21	21	0	85
Total		213,097	123,706	1,574	1,470	0	339,847

Data sources: PNLG / FeDL / Evolve

¹⁸ 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 connections

6.5 This section provides a more detailed analysis of the gas **medium and large I&C sector**, by connections as at the end of December 2025.

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

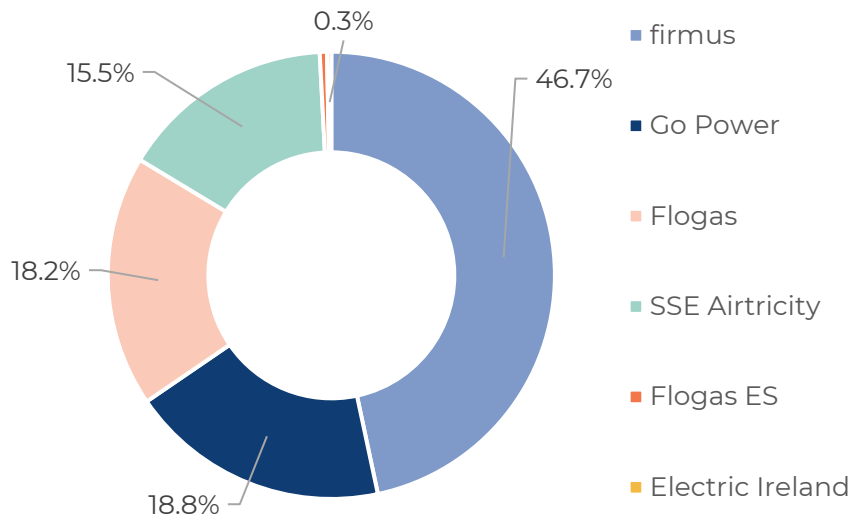


Figure 38: Medium & Large I&C Connections by Market Segment

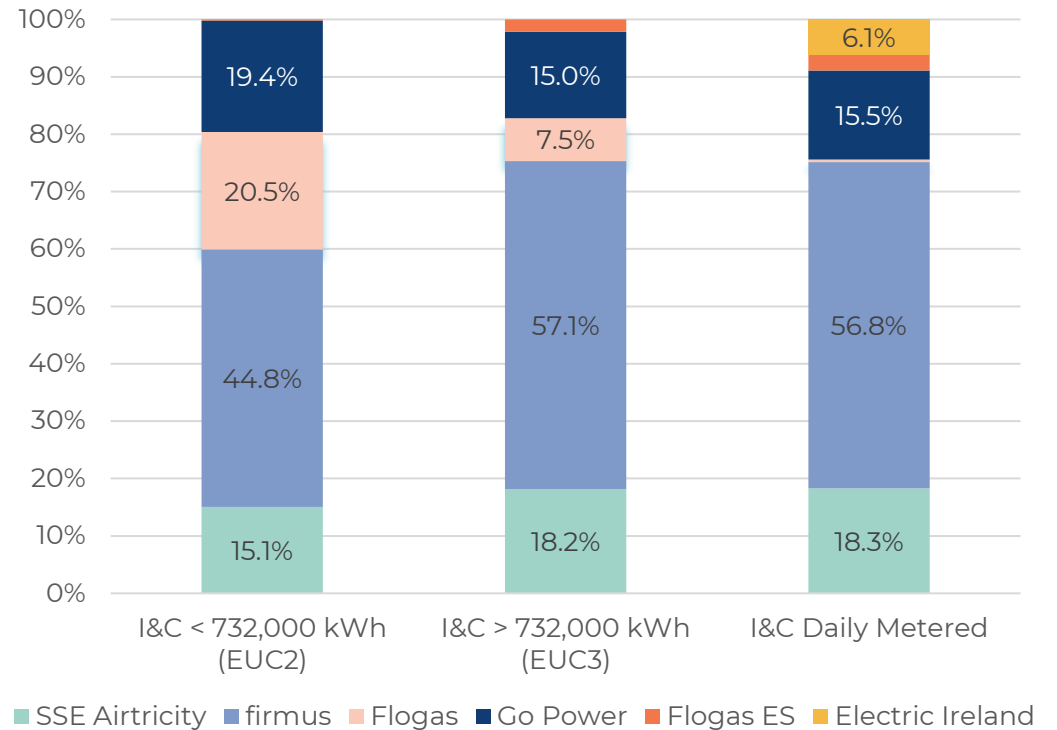


Table 17: Medium & Large I&C analysis (by connections)

Market Segment	SSE Airtricity	firmus	Flogas	Go Power	Flogas ES	Electric Ireland	Total Connections
I&C < 732,000 kWh (EUC2)	539	1,606	733	696	7	0	3,581
I&C > 732,000 kWh (EUC3)	75	236	31	62	9	0	413
I&C Daily Metered	39	121	1	33	6	13	213
Total	653	1,963	765	791	22	13	4,207

Data sources: PNLG / FeDL / Evolve



Domestic and small I&C analysis by consumption

6.6 This section provides a more detailed analysis of the gas **domestic and small I&C sector**, by consumption as at the end of December 2025.

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

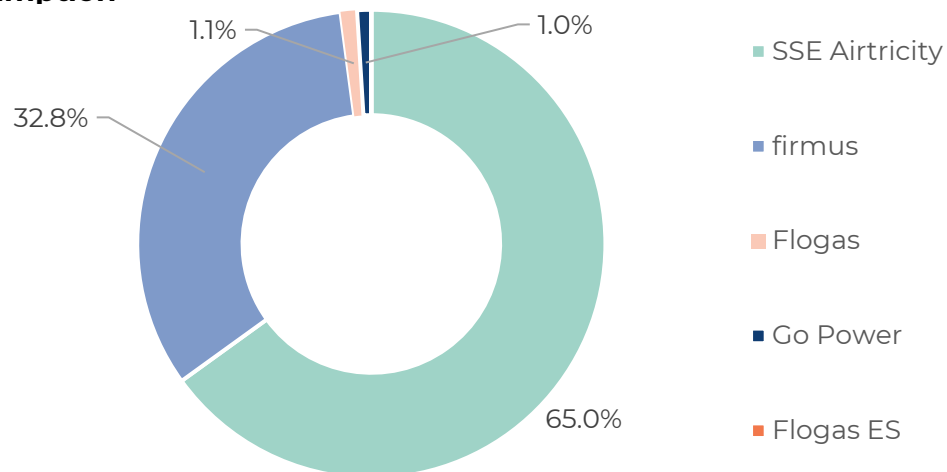


Figure 40: Domestic and small I&C market share by market segment and consumption

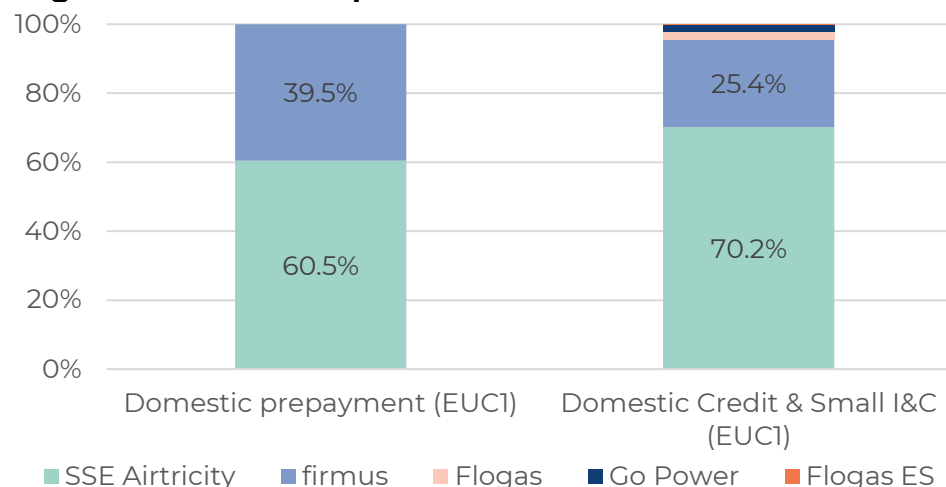


Table 18: Domestic and small I&C analysis by consumption (MWh)

Distribution Licensed Area	Market Segment	SSE Airtricity	firmus	Flogas	Go Power	Flogas ES	Total Consumption
G.Belfast	Domestic prepayment (EUC1)	969,800	228,501	0	0	0	1,198,300
G.Belfast	Domestic Credit & Small I&C (EUC1)	1,023,332	168,827	25,988	23,645	113	1,241,904
Ten Towns	Domestic prepayment (EUC1)	0	424,527	0	0	0	424,527
Ten Towns	Domestic Credit & Small I&C (EUC1)	189	205,177	9,050	6,448	0	220,863
West	Domestic prepayment (EUC1)	28,768	0	0	0	0	28,768
West	Domestic Credit & Small I&C (EUC1)	13,772	948	335	316	0	15,370
Total		2,035,860	1,027,979	35,372	30,408	113	3,129,733

Data sources: PNGL / FeDL / Evolve

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**¹⁹, by consumption for the period January to December 2025.

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

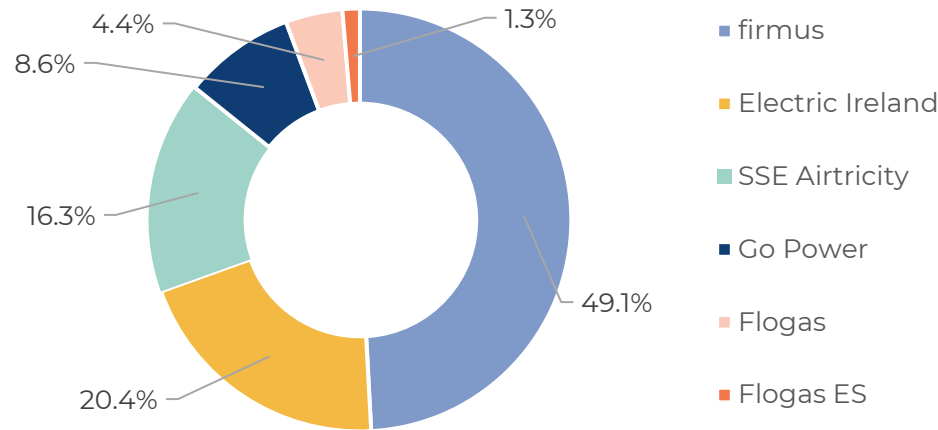


Figure 42: Medium and large I&C market share by market segment and consumption

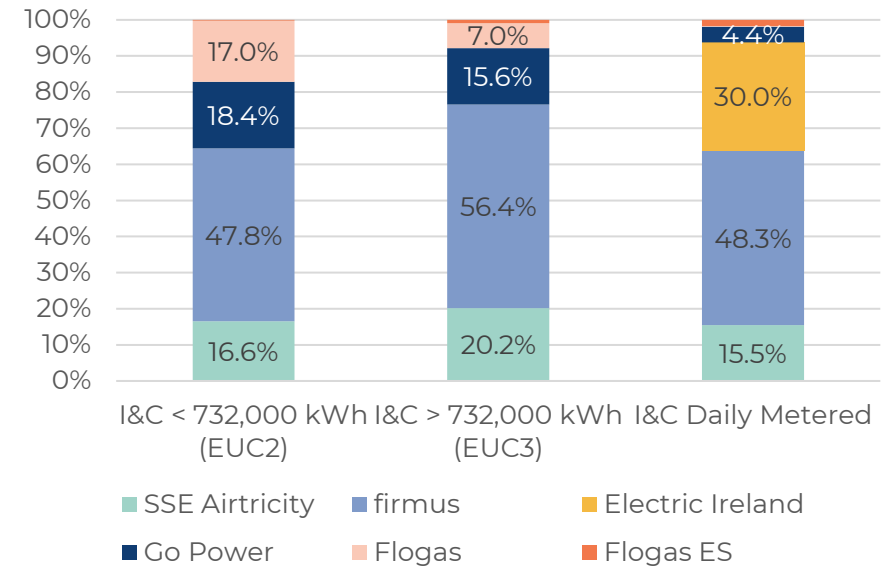


Table 19: Medium and large I&C analysis by consumption (MWh)

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)	118,893	221,100	95,503	103,849	1,056	0	540,401
G.Belfast	I&C > 732,000 kWh (EUC3)	57,917	145,706	19,144	48,169	1,242	0	272,179
G.Belfast	I&C Daily Metered	75,042	602,209	0	64,063	31,161	180,635	953,110
Ten Towns	I&C < 732,000 kWh (EUC2)	9,592	146,326	34,883	38,225	326	0	229,351
Ten Towns	I&C > 732,000 kWh (EUC3)	31,328	97,423	8,565	19,947	2,697	0	159,961
Ten Towns	I&C Daily Metered	168,758	532,451	0	47,783	14,279	106,976	870,248
West	I&C < 732,000 kWh (EUC2)	518	5,021	1,995	1,083	0	0	8,616
West	I&C > 732,000 kWh (EUC3)	1,366	10,097	3,661	1,878	0	0	17,002
West	I&C Daily Metered	158,018	118,992	2,901	2,034	0	490,858	772,804
Total		621,431	1,879,325	166,652	327,032	50,762	778,469	3,823,671

Data sources: PNGL / FeDL / Evolve

¹⁹ The medium and large I&C sector relates to any customers with annual consumption that is greater than or equal to 73,200 kWh per annum. The I&C Daily Metered sector relates to any customer with annual consumption that is greater than 2,196,000 kWh per annum.

Gas – new domestic and I&C connections

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 2025.

Figure 43: New domestic connections

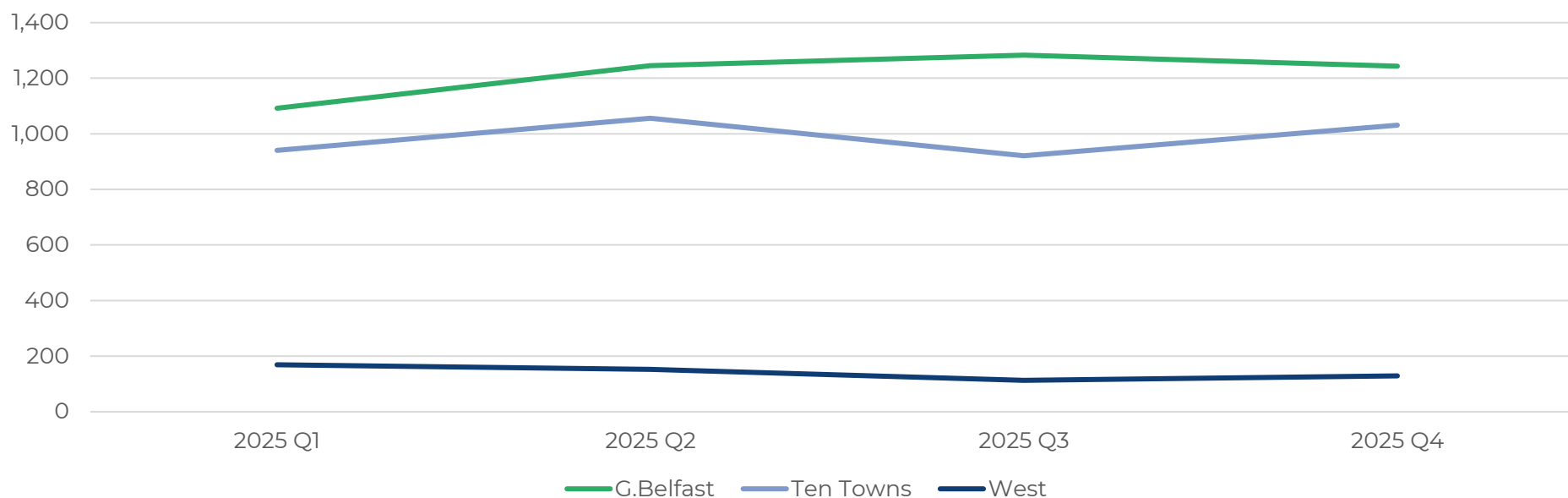


Table 20: Number of new domestic connections

Distribution Licensed Area	2025 Q1	2025 Q2	2025 Q3	2025 Q4	Total
Greater Belfast	1,092	1,245	1,283	1,243	4,863
Ten Towns	940	1,056	921	1,031	3,948
West	169	152	113	129	563
Total	2,201	2,453	2,317	2,403	9,374

Data source: PNGL / FeDL / Evolve

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 2025.

Figure 44: New I&C connections

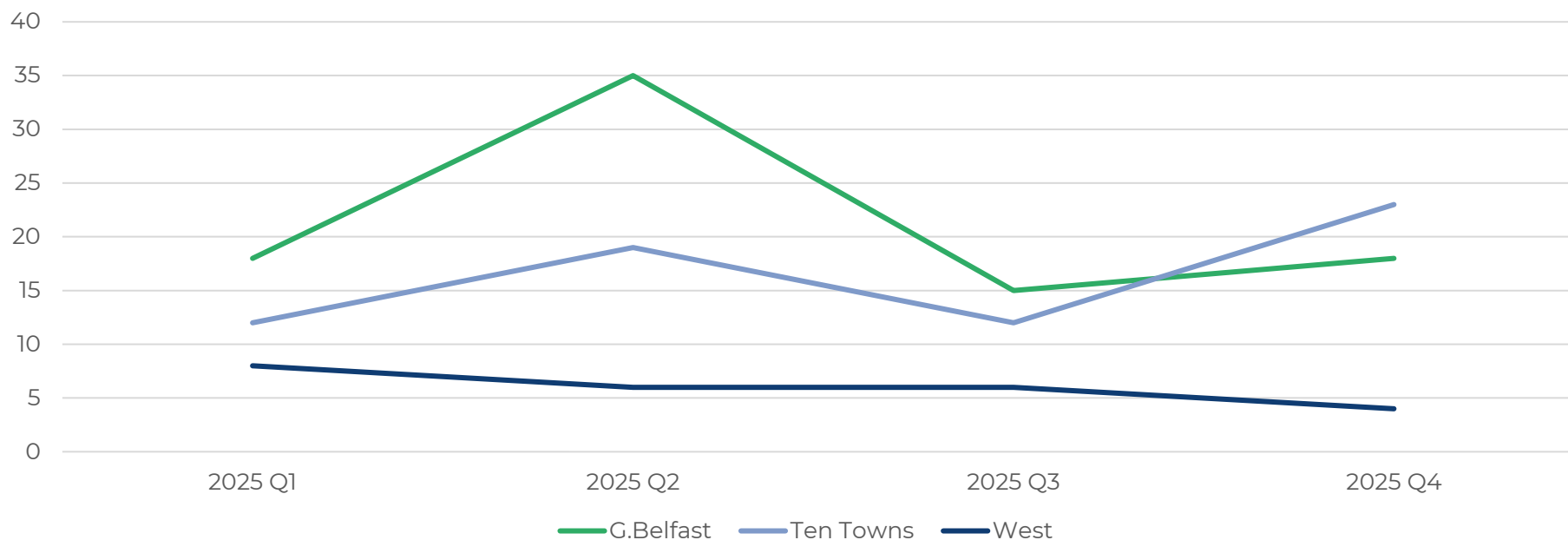


Table 21: Number of new I&C connections

Distribution Licensed Area	2025 Q1	2025 Q2	2025 Q3	2025 Q4	Total
Greater Belfast	18	35	15	18	86
Ten Towns	12	19	12	23	66
West	8	6	6	4	24
Total	38	60	33	45	176

Data source: PNGL / FeDL / Evolve

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 rate²⁰ for each quarter of 2025. There was a total of 9,253 gas switches in 2025, which is an all-time high and represents a significant increase from 2,304 in the previous year.

Figure 45: Gas - quarterly total change of supplier

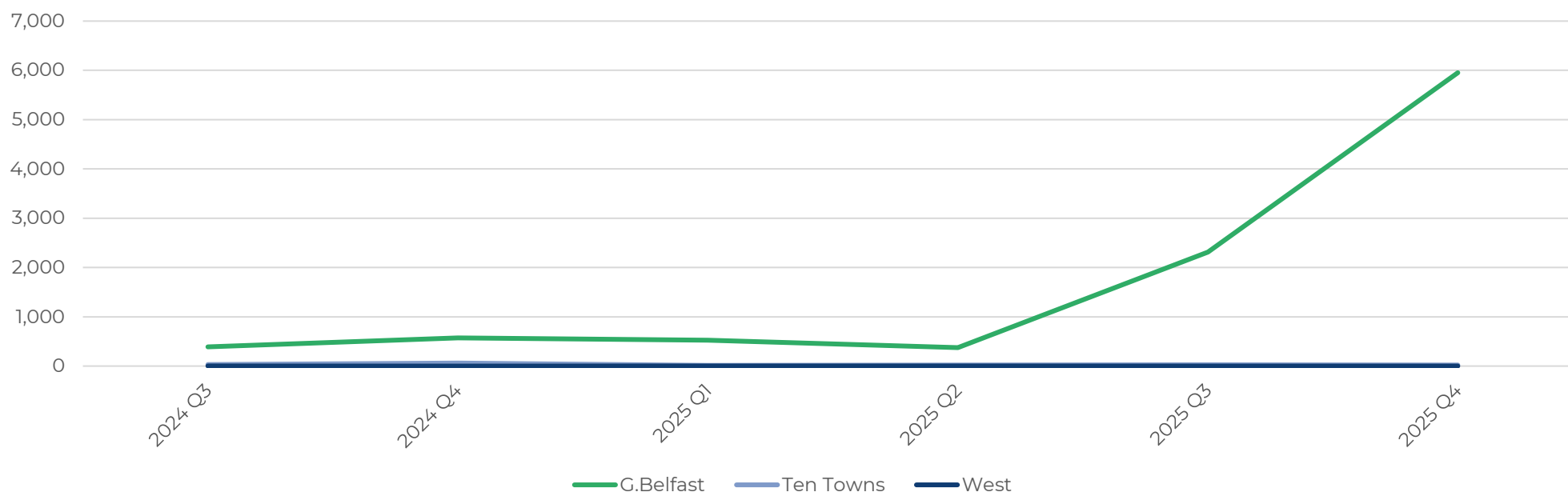


Table 22: Gas -switching rate – total NI market

Quarter	2025 Q1	2025 Q2	2025 Q3	2025 Q4	Total
No. of switches	539	398	2,341	5,975	9,253
Switching rate (%)	0.2%	0.1%	0.7%	1.7%	2.8%

Data source: PNGL / FeDL / Evolve

²⁰ 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.

6.11 Greater Belfast is the only distribution area in which there is competition within the domestic credit and prepayment²¹ 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 2025. The total number of gas domestic switches in 2025 was 8,741 which is a significant increase from 1,561 in the previous year.

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

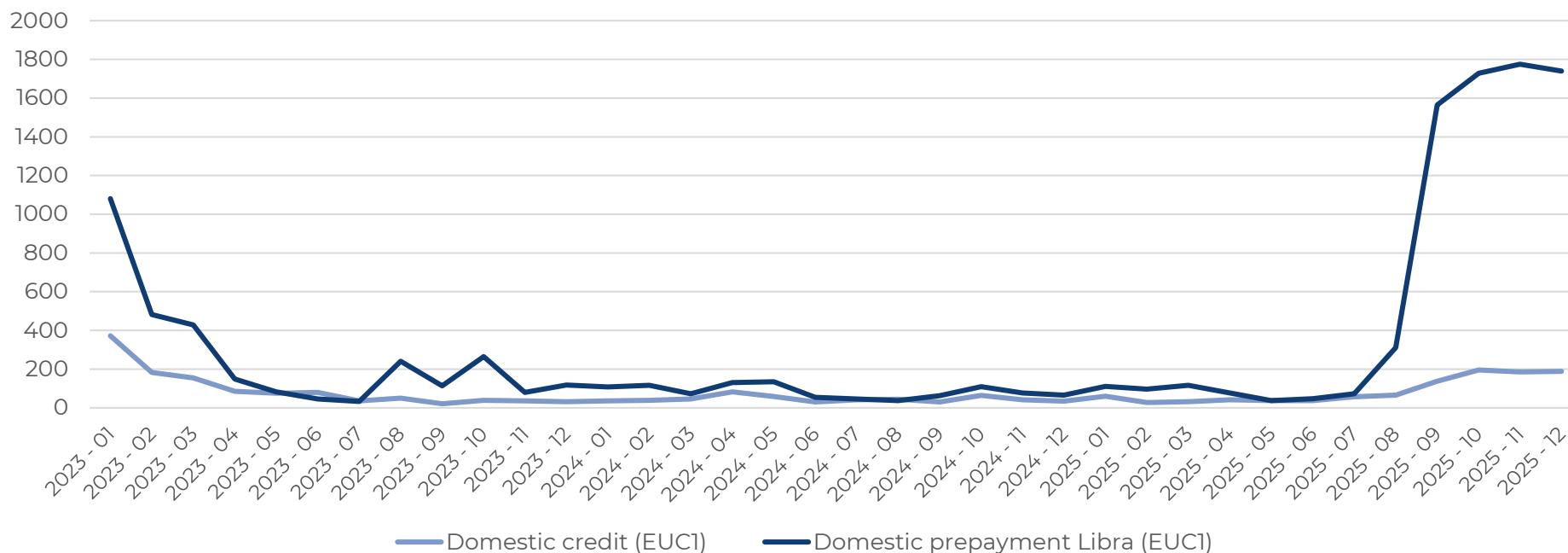


Table 23: Gas - switching rate - domestic market (G. Belfast only)

Quarter	2025 Q1	2025 Q2	2025 Q3	2025 Q4	Total
No. of switches	442	277	2,209	5,813	8,741
Switching rate (%)	0.2%	0.1%	0.9%	2.3%	3.6%

Data source: PNGL

²¹ 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.

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 2025. The total number of gas I&C switches in 2025 was 512, a decrease from 743 in the previous year.

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



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

Quarter	2025 Q1	2025 Q2	2025 Q3	2025 Q4	Total
No. of switches	97	121	132	162	512
Switching rate (%)	0.6%	0.8%	0.9%	1.1%	3.4%

Data source: PNGL / FeDL / Evolve

Gas - Sticky customers

- 6.13 Within the REMM framework²² 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	135,698	54%
Switched 3+ years ago	45,170	18%
Switched in last 3 years	69,206	28%
Total	250,074	100%

Table 26: I&C sticky customers by connection

Market Activity	I&C Connections	%
Never Switched	6,046	40%
Switched 3+ years ago	5,294	35%
Switched in last 3 years	3,674	24%
Total	15,014	100%

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

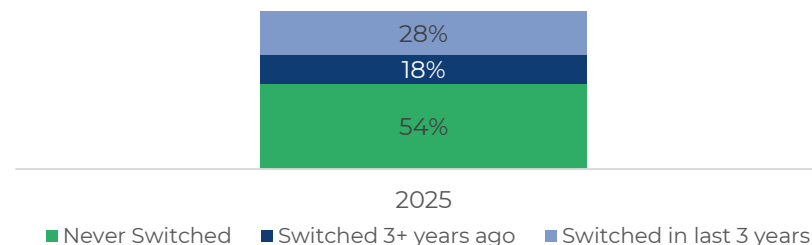
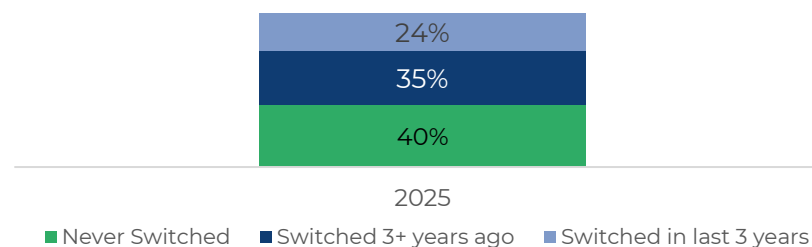


Figure 49: I&C sticky customers as percentage of total I&C connections



Data source: PNGL/ FeDL /Evolve

²² [2015 REMM Framework.pdf](#)

7. Gas pricing – 2025²³

Domestic gas prices²⁴

- 7.1 The pricing data detailed in this Annual REMM report provides a comparison for the period January – June 2025 (semester 1) and July – December 2025 (semester 2).
- 7.2 The pricing data detailed in this report is for 2025. 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 2 2025, the NI domestic gas prices were lower than Ireland and the EU Median but higher than the UK²⁵.

Figure 50: Medium domestic connections unit prices incl. all Taxes (January - June 2025)

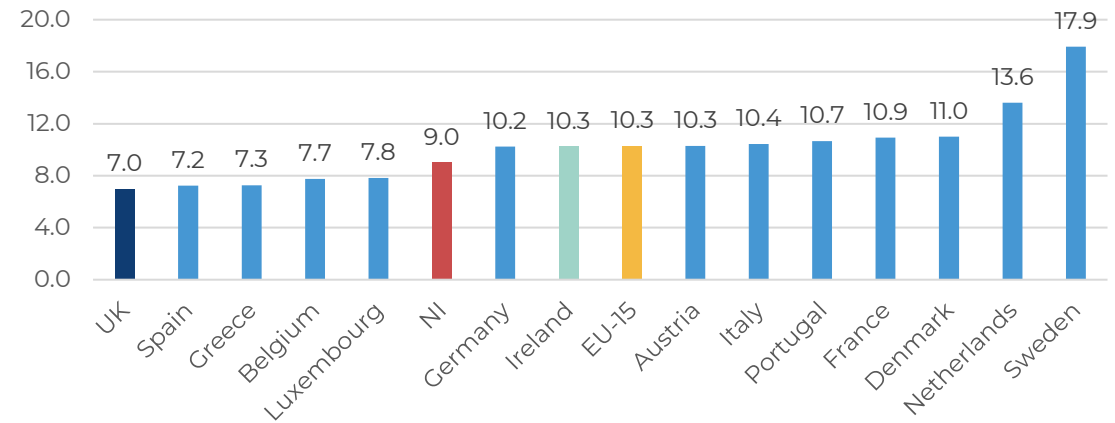
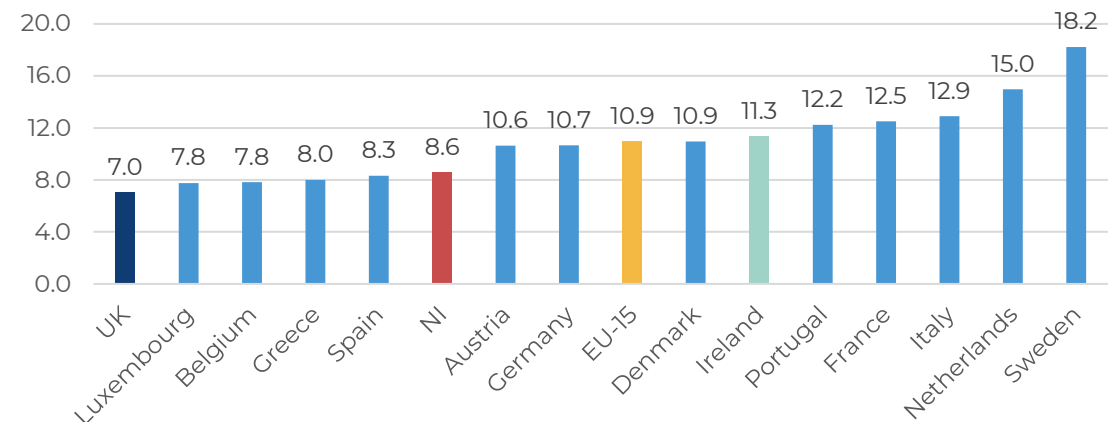


Figure 51: Medium domestic connections unit prices incl. all Taxes (July - December 2025)



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

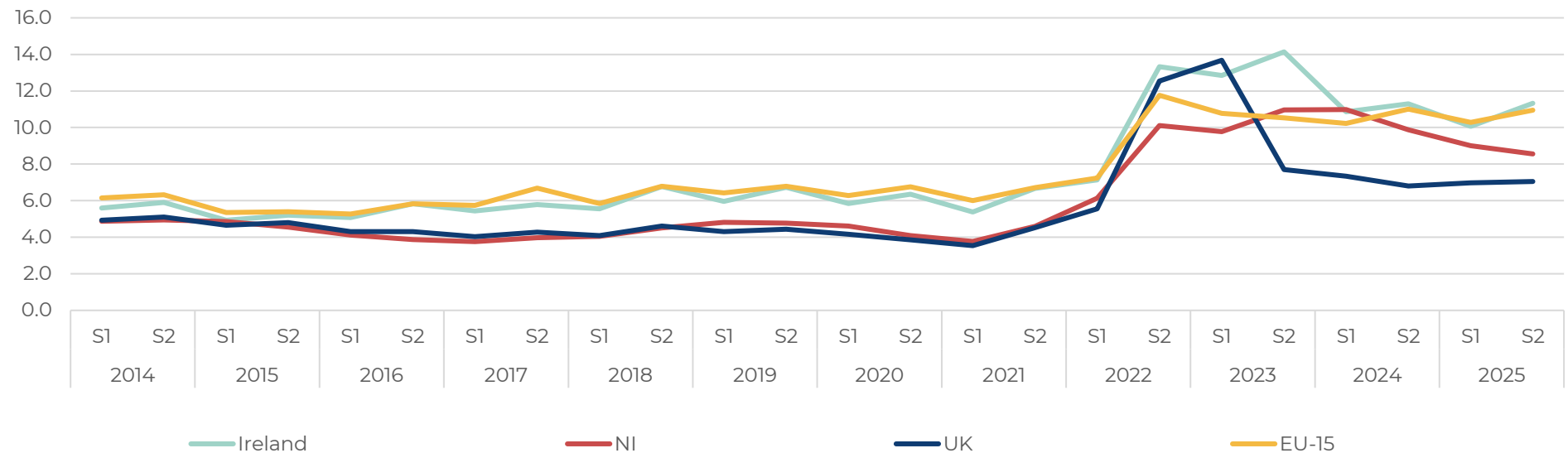
²³ Pricing data within the AREMM (and also within our Quarterly reports): the unit prices provided include an average of all the tariffs offered by all suppliers, which could include 30+ from one supplier. When we publish comparison information within the regulated supplier tariff announcements, we use the standard domestic tariff. In addition, comparison dates will also need to be considered – for example the AREMM contains 2025 pricing data, whereas our most recent comparison included in the latest tariff reviews is correct from 1 July 2026.

²⁴ 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](#).

²⁵ Please note: Data revised June 2026

- 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.
- 7.5 Recent changes to regulated tariffs are not reflected in this report due to the mismatch in time horizons.
- 7.6 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

I&C gas prices

- 7.7 **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.
- 7.8 During semester 1 2025 (January - June), the NI prices in the very small I&C category were just above the 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 median.
- 7.9 During semester 2 2025 (July - December), the NI prices in the very small I&C category were below the UK, 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 2025)

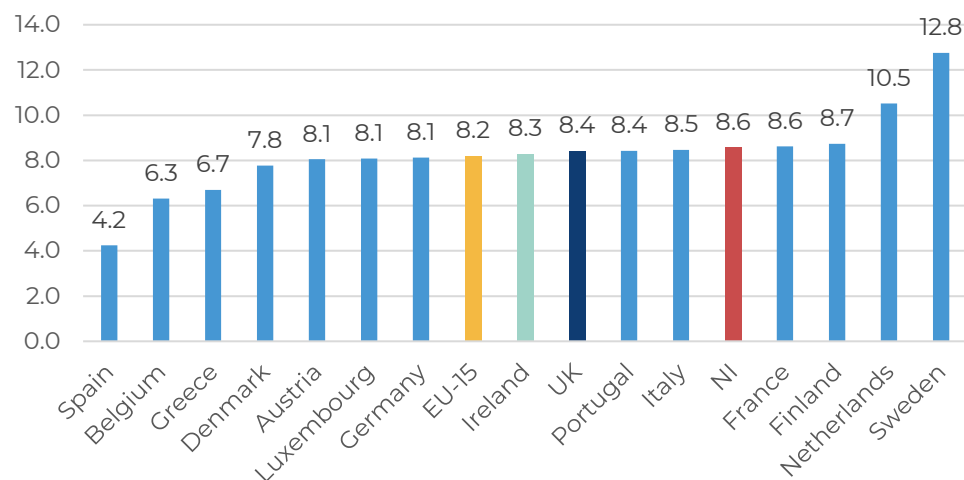
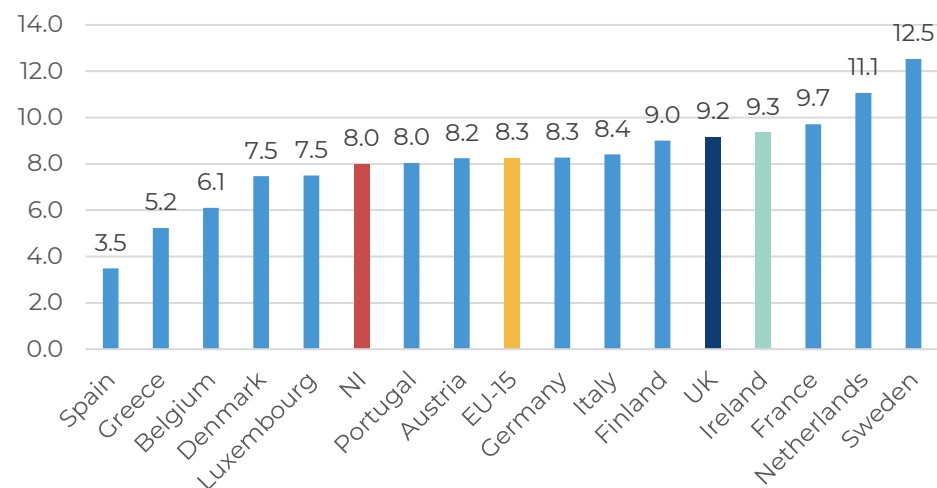


Figure 56: Very small connections prices excl. VAT, incl. other taxes (July – December 2025)



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

Figure 57: Small connections prices excl. VAT, incl. other taxes (January – June 2025)

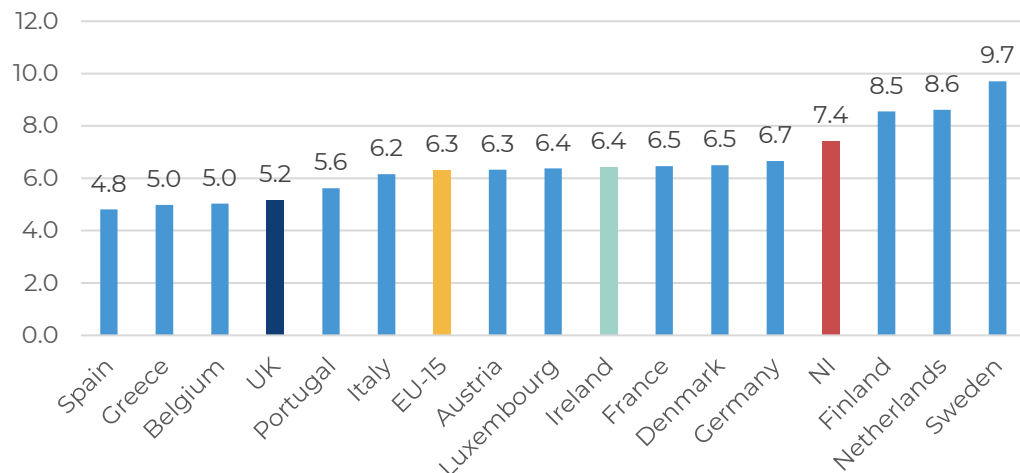


Figure 58: Small connections prices excl. VAT, incl. other taxes (July – December 2025)

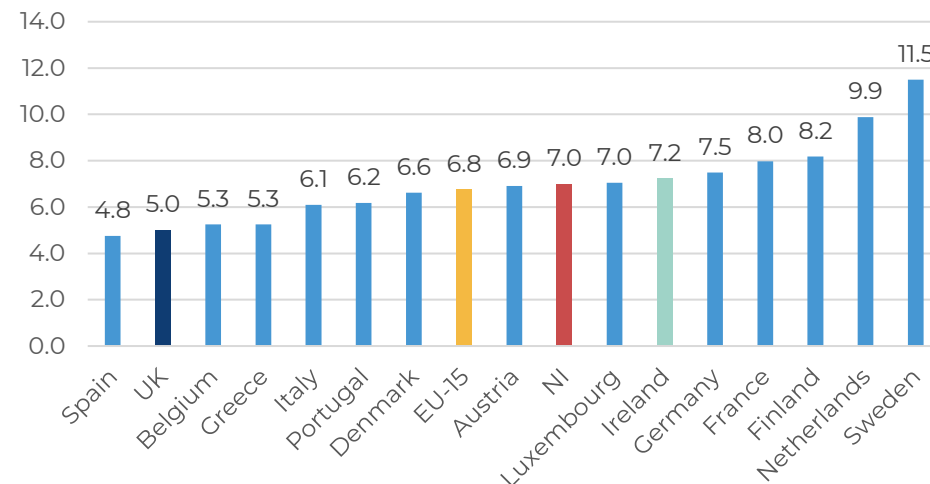


Figure 59: Medium/Large connections prices excl. VAT, incl. other taxes (January – June 2025)

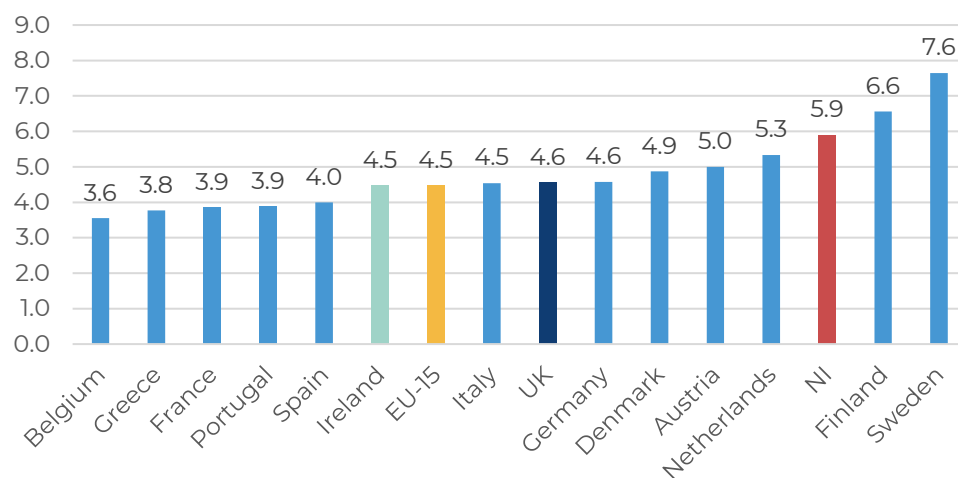
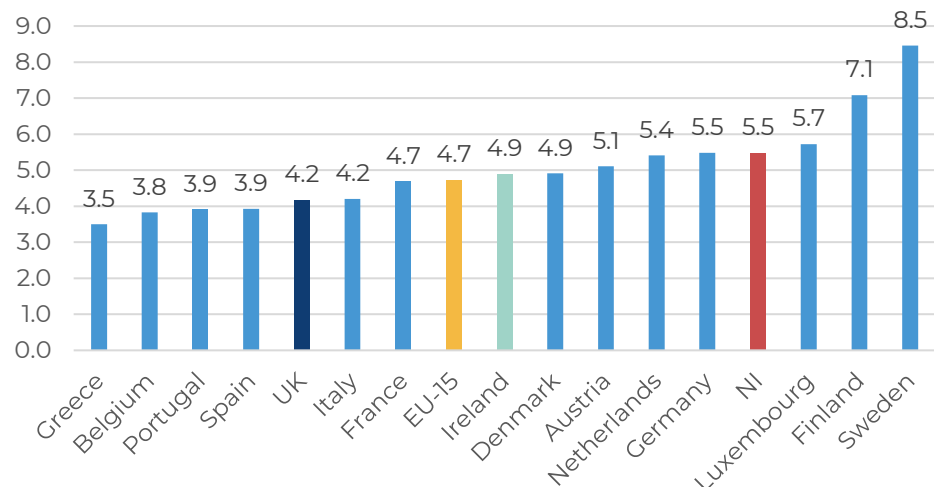


Figure 60: Medium/Large connections prices excl. VAT, incl. other taxes (July - December 2025)



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

8. Gas supplier complaints

- 8.1 This section of the report provides readers with information in relation to gas supplier complaints collated in 2025. The definition of a complaint is outlined in our Code of Practice minimum standards on Complaints Handling²⁶. The complaints data is provided by gas suppliers as per the REMM framework.

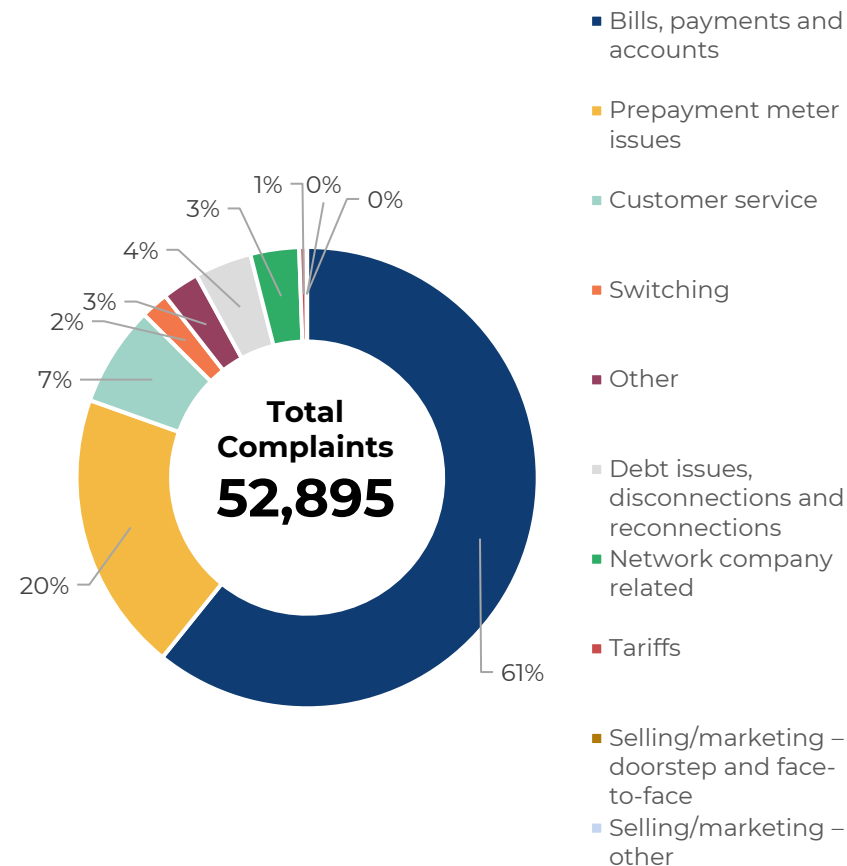
Total supplier complaints

- 8.2 The table below shows the total number of complaints received by suppliers during 2025, 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 2025 for all customers. The total number of gas complaints in 2025 was 52,895, a decrease from 63,896 in 2024.
- 8.3 During 2025, the three most common gas supplier complaints related to; bills, payments and accounts (61%), prepayment meter issues (20%) and customer service (7%).

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	30,443	1,712	32,155
Prepayment meter issues	10,398	1	10,399
Customer service	3,589	140	3,729
Switching	1,000	27	1,027
Other	1,337	35	1,372
Debt issues, disconnections and reconnections	1,923	193	2,116
Network company related	1,730	74	1,804
Tariffs	259	17	276
Selling/marketing – doorstep and face-to-face	7	0	7
Selling/marketing – other	10	0	10
Total	50,696	2,199	52,895

Figure 61: Gas – total complaints by type

Data source: NI gas suppliers

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 reports²⁷ and Eurostat data base²⁸) 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 reports²⁹ and Eurostat data base³⁰) 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 reports³¹ 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 Operators³² (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		Gas: Greater Belfast ³³	
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 ³⁴
		I&C	Incumbent supplier since September 1996: SSE Airtricity September 2008: firmus energy March 2009: Vayu (Naturgy as of 29 th November 2018) (Flogas Enterprise Solutions Ltd as of 20 th December 2021) May 2013: Electric Ireland August 2014: Go Power December 2014: Flogas
		Gas: Ten Towns ³⁵	
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 29 th November 2018) (Flogas Enterprise Solutions Ltd as of 20 th 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 th November 2018) (Flogas Enterprise Solutions Ltd as of 20 th 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