

Retail energy markets dashboard

Methodology

Last updated: July 2026

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About this document

This document provides a structured methodology reference for each indicator published in the ACER retail monitoring dashboard. It aims to ensure transparency, consistency, and replicability of all reported metrics.

For each indicator, the following elements are presented:

- **Description:** A clear explanation of the indicator, including its definition, scope, and key concepts.
- **Segments:** Independent categories used to disaggregate the indicator (e.g. household vs non-household or measurement dimensions). Segments may not sum to the total indicator.
- **Breakdown:** Sub-components that collectively add up to the total value of the indicator. Unlike segments, breakdown categories are additive and together form the full indicator.
- **Views:** Alternative representations of the same indicator, reflecting different measurement approaches, units, or perspectives. Different views allow the same metric to be analysed from different angles.
- **Data source:** The underlying data used to construct the indicator, including data providers relevant definitions or metadata.
 - **Eurostat:** Data from Eurostat is referenced for each indicator including the relevant dimension and values
 - **National regulatory authorities' (NRAs') input to questionnaire:** Data made available by NRAs on the basis of a dedicated annual questionnaire. These data may include non-validated third-party values or estimates. All data inputs used from the questionnaire are specified. Definitions, Methodologies, and reporting practices may differ across countries; therefore, direct comparisons should be made with caution.
- **ACER processing:** A description of all data processing steps applied by ACER, including any transformations, harmonisation, mappings, or aggregations performed on the raw data.
- **EU-27 aggregate/average:** Where meaningful, an EU-27 aggregate or average is provided alongside national data. EU-27 aggregated totals are only published where all Member States provide the required data, while EU-27 averages are published where at least 70% of Member States provide the required data.

1. Electricity

1.1. Average consumption per customer

Description: Average consumption represents representative electricity use per customer, measured in kWh/year. The indicator is based on consumption measured at metering points and is reported for both household and non-household customers.

Segments:

- Household
- Non-household

Views:

- Mean
- Median
- Mode

Methodology

Data source: NRA input to questionnaire

- Number of household electricity customers
- Number of non-household electricity customers
- Total consumption of household and non-household segment in the electricity sector
- Most common (mode) and median consumption per year for household and non-household segments in the electricity sector

ACER processing: The values for median and mode are taken as provided by NRAs. The mean is calculated as the total consumption divided by the number of customers in the household and non-household sectors

EU-27 average: An EU-27 average is calculated only for the mean consumption indicator, computed as the total consumption divided by the total number of customers across reporting countries using only countries for which both consumption and customer data are available. The EU-27 value is published only where at least 70% of reporting countries provide both data elements.

1.2. Consumption by sector

Description: This indicator shows electricity final consumption by sector, measured in gigawatt-hours (GWh), covering industry, transport, commercial and public services, and households.

Breakdown

- Industry
- Transport
- Commercial
- Household

Methodology

Source data:

Eurostat's [nrg_bal_c](#) - Eurostat data on energy balances, specifically:

Dimension (name and identifier)	Values (name and identifier)
Standard international energy product classification (SIEC) [siec]	Electricity [E7000]
Unit of measure [unit]	Gigawatt-hour [GWH]
Energy balance [nrg_bal]	Final consumption - industry sector - energy use [FC_IND_E]; Final consumption - transport sector - energy use [FC_TRA_E]; Final consumption - other sectors - commercial and public services - energy use [FC_OTH_CP_E]; Final consumption - other sectors - households - energy use [FC_OTH_HH_E]

ACER processing: No ACER processing, values taken as provided by Eurostat

EU-27 aggregate: EU-27 refers to the aggregated total across EU-27 countries, calculated as the sum of energy balance components, as reported by Eurostat.

1.3. Contract type distribution

Definition

This indicator shows the share of customers across different contract types in both the household and non-household segments of the electricity sector.

It includes contract categories defined in Directive (EU) 2019/944, such as fixed-term, fixed-price electricity supply contracts and dynamic electricity price contracts. The classification is further complemented by additional categories, including contracts with monthly or quarterly indexation and other contract types (including hybrid arrangements).

For each contract type, a distinction is made between time-of-use pricing and single (flat) pricing, where applicable.

The data are also presented by differentiating between market-based contracts, where suppliers are free to set electricity prices, and regulated contracts, where prices are set or controlled by authorities. These categories are shown separately with their respective breakdowns.

Segments

- Household
- Non-household

Breakdown:

- Market-based dynamic price
- Market-based single fixed price, fixed-term
- Market-based hybrid
- Market-based monthly spot average single price
- Market-based ToU fixed price, fixed-term
- Market-based monthly spot ToU price
- Market-based other
- Regulated dynamic price
- Regulated single fixed price, fixed-term
- Regulated hybrid
- Regulated monthly spot average single price
- Regulated ToU fixed price, fixed-term
- Regulated ToU monthly spot ToU price
- Regulated other

Methodology

Source data: NRA input to questionnaire

- Share of household electricity customers by contract type
- Share of non-household electricity customers by contract type

ACER processing: Responses provided by NRAs are consolidated and mapped into standardised categories representing different electricity contract types. These categories are applied consistently to both household and non-household segments and grouped as follows:

Standardised retail dashboard categories	Original NRA response categories
Market-based dynamic price	Market-based dynamic price contracts
Market-based single fixed price, fixed-term	Annual/multiannual single market-based fixed-price, fixed-term contracts (no price variation)
Market-based hybrid	Market-based hybrid contracts
Market-based monthly spot average single price	Market-based variable contracts based on average monthly/quarterly spot price with one single price
Market-based ToU fixed price, fixed-term	Annual/multiannual time of use market-based fixed-price, fixed-term contracts
Market-based monthly spot ToU price	Market-based variable contracts based on average monthly/quarterly spot price with time-of-use pricing
Market-based other	Other market-based contracts
Regulated dynamic price	Regulated dynamic price contracts
Regulated single fixed price, fixed-term	Regulated annual/multiannual single market-based fixed-price, fixed-term contracts
Regulated hybrid	Regulated hybrid contracts
Regulated monthly spot average single price	Regulated variable contracts based on average monthly/quarterly spot price with one single price
Regulated ToU fixed price, fixed-term	Regulated annual/multiannual time of use market-based fixed-price, fixed-term contracts
Regulated ToU monthly spot ToU price	Regulated variable contracts based on average monthly/quarterly spot price with time-of-use pricing
Regulated other	Other regulated contracts

1.4. Customer count

Description: The number of electricity customers represents the total number of customers within the electricity market. In addition to the overall number of household and non-household customers, the data also provides a breakdown by different consumption levels (bands). The number of customers is determined based on the count of metering points.

Breakdown

- Household
 - Band DA: Consumption less than 1 000 kWh
 - Band DB: Consumption from 1 000 kWh to 2 499 kWh
 - Band DC: Consumption from 2 500 kWh to 4 999 kWh
 - Band DD: Consumption from 5 000 kWh to 14 999 kWh
 - Band DE: Consumption 15 000 kWh or over
- Non-household
 - Band IA: Consumption less than 20 MWh
 - Band IB: Consumption from 20 MWh to 499 MWh
 - Band IC: Consumption from 500 MWh to 1 999 MWh

Methodology

Source data: NRA input to questionnaire

- Number of household electricity customers
- Number of non-household electricity customers

ACER processing: No adjustment applied - values are used as reported by NRAs.

EU-27 aggregate: EU-27 refers to the aggregated total number of electricity customers across EU-27 countries, calculated as the sum of household and non-household customers reported by national regulatory authorities. The EU-27 total is shown only where reporting across all Member States is complete.

1.5. Energy use category

Description: This indicator shows the electricity balance in gigawatt-hours (GWh), covering how electricity is consumed or lost within the energy system. It breaks down into final consumption for energy use, distribution losses during transmission, and net exports (exports minus imports).

Breakdown

- Distribution losses
- Net exports
- Final consumption, energy use

Methodology

Source data:

Eurostat's [nrg_bal_c](#) - Eurostat data on energy balances, specifically:

Dimension (name and identifier)	Values (name and identifier)
Standard international energy product classification (SIEC) [siec]	Electricity [E7000]
Unit of measure [unit]	Gigawatt-hour [GWH]
Energy balance [nrg_bal]	Imports [IMP]; Exports [EXP]; Distribution losses [DL]; Final consumption - energy use [FC_E];

Eurostat's [nrg_cb_pem](#): Eurostat data on net electricity generation by fuel, specifically:

ACER processing: Distribution losses and final consumption, energy use are taken directly from the source data without further adjustments.

Net exports are calculated as exports minus imports. Negative values (net imports) are set to zero.

EU-27 aggregate: EU-27 refers to the aggregated total across EU-27 countries, calculated as the sum of energy balance components, as reported by Eurostat.

1.6. Estimated annual household spend

Description: This indicator estimates the annual electricity expenditure of household customers across different consumption bands. It is calculated by combining representative consumption levels with corresponding average electricity prices, providing an approximation of annual costs for representative households.

Segments

- All Bands
- Band DA: Consumption less than 1 000 kWh
- Band DB: Consumption from 1 000 kWh to 2 499 kWh
- Band DC: Consumption from 2 500 kWh to 4 999 kWh
- Band DD: Consumption from 5 000 kWh to 14 999 kWh
- Band DE: Consumption 15 000 kWh or over

Methodology

Data source: Eurostat's [nrg_pc_204_c](#) - Electricity price components for household customers, specifically:

Dimension (name and identifier)	Values (name and identifier)
Components of energy prices [nrg_prc]	Energy and supply [NRG_SUP]; Network costs [NETC]; Taxes, fees, levies and charges [TAX_FEE_LEV_CHRG]; Value added tax (VAT) [VAT]; Other [OTH]
Currency [currency]	Euro [EUR]
Energy consumption [nrg_cons]	Consumption of kWh - all bands [TOT_KWH]; Consumption less than 1 000 kWh - band DA [KWH_LT1000]; Consumption from 1 000 kWh to 2 499 kWh - band DB [KWH1000-2499]; Consumption from 2 500 kWh to 4 999 kWh - band DC [KWH2500-4999]; Consumption from 5 000 kWh to 14 999 kWh - band DD [KWH5000-14999]; Consumption 15 000 kWh or over - band DE [KWH_LE15000]

ACER processing:

- **Step 1:** A representative consumption value is assigned to each consumption band. For intermediate bands, the midpoint of the consumption range is used. For the lowest and highest bands, estimated values are applied in a way that offers consistency with the spacing of the other bands.
Consumption bands for household consumer segment and estimated annual average consumption used for the calculation:

Consumption band	Estimated representative annual average consumption
Band DA: Consumption less than 1 000 kWh	800 kWh

Band DB: Consumption from 1 000 kWh to 2 499 kWh	1 750 kWh
Band DC: Consumption from 2 500 kWh to 4 999 kWh	3 750 kWh
Band DD: Consumption from 5 000 kWh to 14 999 kWh	10 000 kWh
Band DE: Consumption 15 000 kWh or over	20 000 kWh

- **Step 2:** The corresponding average final price, which is calculated as the sum of the cost components:
 - Energy and supply
 - Network costs
 - Value added tax (VAT)
 - Other Taxes, fees, levies and charges (excluding VAT)

The sum of the different cost components is multiplied by the estimated annual average consumption of each consumption band.

For all bands, the mean household consumption is multiplied by the Eurostat all bands value

EU-27 average: EU-27 refers to the EU-27 average annual expenditure for household customers. It is calculated by first deriving an EU-level unit price for each consumption band as a consumption-weighted average of national unit prices, using Eurostat-reported national consumption weights. For each consumption band, this EU-level unit price is then multiplied by the standardised representative annual consumption.

1.7. EV share of passenger cars

Description: Share of electric vehicles (in %), excluding plug-in hybrids and all other hybrid vehicles.

Methodology

Source data: Eurostat's [road_eqs_carpda](#): Passenger cars, by type of motor energy, specifically:

Dimension (name and identifier)	Values (name and identifier)
Motor energy [mot_nrg]	Total [TOTAL]; Electricity [ELC]

ACER processing: Number of electric passenger cars is divided by total number of passenger cars

EU-27 aggregate: EU-27 refers to the share of electric passenger cars across EU-27 countries, calculated as the total number of electric passenger cars divided by the total number of passenger cars across the EU-27.

1.8. Heat pump installations

Description: Share of customers with a heat pump installed (absolute number and share (%)). The share represents the proportion of electricity customers with a heat pump installed, measured by using the number of metering points.

Segments

- Household
- Non-household

Views

- Absolute
- Share

Methodology

Source data: NRA input to questionnaire

- Number of heat pumps installed in household and non-household segments
- Total number of electricity household customers in household and non-household segments

ACER processing: Total number of heat pumps divided by total number of customers in segment

EU-27 aggregate: EU-27 aggregate refers to the share of electricity customers with a heat pump installed across EU-27 countries, calculated as the total number of heat pump installations divided by the total number of electricity customers across reporting countries. The EU-27 value is published only where at least 70% of countries provide both the number of heat pump installations and total number of electricity customers.

1.9. Household end-use breakdown

Description: The data shows the distribution of household final electricity consumption, expressed as percentage shares across different end-use categories. It covers total household energy consumption, broken down by end-use categories such as cooking, space and water heating, space cooling, lighting and electrical appliances, and other household energy consumption.

Breakdown

- Cooking
- Lighting and electrical appliances
- Space cooling
- Space heating
- Water heating
- Other household end-use

Methodology

Source data: Eurostat's [nrg_d_hhq](#) - Disaggregated final energy consumption in households, specifically:

Dimension (name and identifier)	Values (name and identifier)
Standard international energy product classification (SIEC) [siec]	Electricity [E7000]
Energy balance [nrg_bal]	Final consumption - other sectors - households - energy use [FC_OTH_HH_E]; Final consumption - other sectors - households - energy use - space heating [FC_OTH_HH_E_SH]; Final consumption - other sectors - households - energy use - space cooling [FC_OTH_HH_E_SC]; Final consumption - other sectors - households - energy use - water heating [FC_OTH_HH_E_WH]; Final consumption - other sectors - households - energy use - cooking [FC_OTH_HH_E_CK]; Final consumption - other sectors - households - energy use - lighting and electrical appliances [FC_OTH_HH_E_LE]; Final consumption - other sectors - households - energy use - other end use [FC_OTH_HH_E_OE]
Unit of measure [unit]	Gigawatt-hour [GWH]

ACER processing: Each end-use category's contribution is calculated as its share of total household electricity consumption. This is done by dividing the electricity consumption of each category (e.g. cooking, space heating, lighting and electrical appliances, etc.) by the sum of electricity consumption across all household end-use categories.

EU-27 aggregate: EU-27 aggregate refers to the distribution of household electricity consumption across end-use categories at EU-27 level. It is calculated as the share of each household end-use category in total household electricity consumption across EU-27 countries.

1.10. Market concentration (HHI)

Description: Market concentration, measured by the Herfindahl–Hirschman Index (HHI), reflects the degree of competition within a market by indicating how market share is distributed among suppliers. It is calculated as the sum of the squared market shares (expressed as percentages) of all suppliers in the market. HHI values below 1,500 generally indicate low concentration, values between 1,500 and 2,500 indicate moderate concentration, and values above 2,500 indicate high concentration.

For the household market, each supplier's market share is calculated as the number of household metering points it serves divided by the total number of household metering points in the country. The HHI is then obtained by squaring these percentage shares and summing them across all suppliers.

For the non-household market, each supplier's market share is calculated as the total volume of electricity it supplies to non-household customers divided by the total volume supplied in that segment. The HHI is calculated in the same way, i.e. by summing up the squared percentage shares of all suppliers active in the national non-household market.

Segments

- Household
- Non-household

Methodology

Source data: NRA input to questionnaire

- HHI value for market concentration in the household electricity sector
- HHI value for market concentration in the non-household electricity sector

ACER processing: No adjustment applied; values are used as reported by NRAs.

1.11. Retail unit price

Description: Unit prices (c€/kWh) for household and non-household customers in the electricity sector represent the average cost of electricity supplied, expressed in euro-cent per kilowatt-hour. Prices are presented across different consumption bands to reflect variations in usage levels.

The indicator includes a breakdown of annual price components, namely energy and supply costs, network costs, value added tax (VAT), and other taxes, fees, levies, and charges. This allows for a detailed assessment of the structure of final electricity prices.

Segments

- Household customers
 - All bands: consumption of kWh
 - Band DA: Consumption less than 1 000 kWh
 - Band DB: Consumption from 1 000 kWh to 2 499 kWh
 - Band DC: Consumption from 2 500 kWh to 4 999 kWh
 - Band DD: Consumption from 5 000 kWh to 14 999 kWh
 - Band DE: Consumption 15 000 kWh or over
- Non-household customers
 - All bands: Consumption of kWh - all bands
 - Band IA: Consumption less than 20 MWh
 - Band IB: Consumption from 20 MWh to 499 MWh
 - Band IC: Consumption from 500 MWh to 1 999 MWh
 - Band ID: Consumption from 2 000 MWh to 19 999 MWh
 - Band IE: Consumption from 20 000 MWh to 69 999 MWh
 - Band IF: Consumption from 70 000 MWh to 149 999 MWh
 - Band IG: Consumption 150 000 MWh or over

Breakdown

- Energy and supply costs
- Network costs
- Taxes (incl. VAT), fees, levies and charges
- Allowances

Methodology

Source data:

Eurostat's [nrg_pc_204_c](#) – Electricity price components for household consumers, specifically:

Dimension (name and identifier)	Values (name and identifier)
Components of energy prices [nrg_prc]	Energy and supply [NRG_SUP]; Network costs [NETC]; Taxes, fees, levies and charges [TAX_FEE_LEV_CHRG]; Value added tax (VAT) [VAT]; Other [OTH]
Currency [currency]	Euro [EUR]

Energy consumption [nrg_cons]

Consumption of kWh - all bands [TOT_KWH];
Consumption less than 1 000 kWh - band DA [KWH_LT1000]; Consumption from 1 000 kWh to 2 499 kWh - band DB [KWH1000-2499]; Consumption from 2 500 kWh to 4 999 kWh - band DC [KWH2500-4999]; Consumption from 5 000 kWh to 14 999 kWh - band DD [KWH5000-14999]; Consumption 15 000 kWh or over - band DE [KWH_LE15000]

Eurostat's [nrg_pc_205_c](#) - Electricity price components for non-household consumers, specifically:

Dimension (name and identifier)	Values (name and identifier)
Components of energy prices [nrg_prc]	Energy and supply [NRG_SUP]; Network costs [NETC]; Taxes, fees, levies and charges [TAX_FEE_LEV_CHRG]; Value added tax (VAT) [VAT]; Other [OTH]
Currency [currency]	Euro [EUR]
Energy consumption [nrg_cons]	Consumption of kWh - all bands [TOT_KWH]; Consumption 149 999 MWh or less - band IA-IF [MWH_LE149999]; Consumption less than 20 MWh - band IA [MWH_LT20]; Consumption from 20 MWh to 499 MWh - band IB [MWH20-499]; Consumption from 500 MWh to 1 999 MWh - band IC [MWH500-1999]; Consumption from 2 000 MWh to 19 999 MWh - band ID [MWH2000-19999]; Consumption from 20 000 MWh to 69 999 MWh - band IE [MWH20000-69999]; Consumption from 70 000 MWh to 149 999 MWh - band IF [MWH70000-149999]; Consumption 150 000 MWh or over - band IG [MWH_GE150000]

ACER processing:

- **Step 1:** For each segment, the cost components “Energy and supply” and “Network costs” are taken as reported. The component “Taxes, fees, levies and charges” is then split into two parts: “VAT”, as a defined subcomponent, and “Other taxes”, calculated as the residual difference between total taxes, fees, levies and charges and VAT.
- **Step 2:** The final unit price for each segment is obtained by summing the four components: Energy and supply, Network costs, VAT, and Other taxes.

EU-27 average: EU-27 refers to the EU-27 average unit price and price components as provided by Eurostat. It is calculated as a consumption-weighted average of national unit prices, using Eurostat-reported national electricity consumption weights.

1.12. Smart meter rollout

Description: Smart meter roll-out in the electricity sector (in %), showing the share of customers with smart meters, measured by metering points, relative to the total number of household and non-household customers.

Segments

- Household
- Non-household

Methodology

Source data: NRA input to questionnaire

- Share of final customers with smart meters among total household and non-household customers in the electricity sector

ACER processing: No adjustment applied; values are used as reported by NRAs.

EU-27 aggregate: EU-27 refers to the customer-weighted average share of electricity customers with smart meters across EU-27 countries. It calculated as a customer-weighted average using the number of electricity customers (Indicator 11) as weights. The EU-27 value represents the share of customers with smart meters relative to total customers across reporting countries and is published only where at least 70% of countries provide data.

1.13. Solar PV installations

Description: Share of customers with a solar PV installation in the household and non-household segments (absolute and share (%)). The share is measured as the proportion of electricity customers with rooftop or on-site solar PV systems relative to the total number of customers, as measured by metering points.

Segments

- Household
- Non-household

Views

- Absolute
- Share

Methodology

Source data: NRA input to questionnaire

- Number of household and non-household customers in the electricity sector
- Number of customers with solar PV installed on their rooftops/ on their property

ACER processing: Number of customers with PV installed on their rooftops/ on their property divided by total number of customers for both household and non-household segments

EU-27 aggregate: EU-27 aggregate refers to the share of electricity customers with a solar PV installation across EU-27 countries, calculated as the total number of customers with solar PV installations divided by the total number of electricity customers across reporting countries. The EU-27 value is published only where at least 70% of countries provide both the number of PV installations and total number of electricity customers.

1.14. Supplier count

Description: The number of electricity suppliers represents the total count of suppliers operating in the electricity sector. Only active suppliers are considered, i.e. those participating in the market and offering contracts to final customers, while self-suppliers are excluded.

Breakdown

- Household
- Non-household

Methodology

Source data: NRA input to questionnaire

- Number of active electricity suppliers for household customers
- Number of active electricity suppliers for non-household customers
- Number of household electricity customers
- Number of non-household electricity customers

ACER processing: No adjustment is applied to the absolute number of suppliers; values are used as reported by NRAs.

1.15. Switching rate

Description: The switching rate represents the share of customers who change their electricity or gas supplier within a given year (in %). It is measured both by the number of metering points and by the volume of electricity supplied.

Switching rate (metering points): Calculated as the total number of metering points that switched contracts during the reference year divided by the total number of metering points.

Switching rate (volume): Calculated as the total volume of electricity that switched contracts during the reference year divided by the total volume of electricity supplied.

Segments

- Household customers
- Non-household customers

Views

- By metering points
- By volume

Methodology

Source data: NRA input to questionnaire

- Annual switching rate by metering point for household electricity customers
- Annual switching rate by metering point for non-household electricity customers
- Annual switching rate by volume for household electricity customers
- Annual switching rate by volume for non-household electricity customers
- Total annual electricity consumption of household and non-household customers

ACER processing: No adjustment applied; values are used as reported by NRAs.

EU-27 average: EU-27 refers to the EU-level switching rate across EU-27 countries. For the metering point view, the EU-27 value is calculated as a customer-weighted average using the number of electricity customers (Indicator 11) as weights. For the volume view, the EU-27 value is calculated as a consumption-weighted average using total electricity consumption, as reported by NRAs, as weights. The EU-27 values are published only where at least 70% of countries provide the required data for each respective view.

2. Natural gas

2.1. Average consumption per customer

Description: Average consumption represents representative natural gas use per customer. It is measured in kWh/year. The indicator is based on consumption measured at metering points and is reported for both household and non-household customers.

Segments:

- Household
- Non-household

Views:

- Mean
- Median
- Mode

Methodology

Source data: NRA input to questionnaire

- Number of household natural gas customers
- Number of non-household natural gas customers
- Total consumption of household and non-household segment in the natural gas sector
- Most common (mode) and median consumption per year for household and non-household segments in the natural gas sector

ACER processing: The values for median and mode are taken as provided by NRAs. The mean is calculated as the total consumption divided by the number of customers in the household and non-household sectors.

EU-27 average: An EU-27 average is calculated only for the mean consumption indicator, computed as the total consumption divided by the total number of customers across reporting countries using only countries for which both consumption and customer data are available. The EU-27 value is published only where at least 70% of reporting countries provide both data elements.

2.2. Consumption by sector

Description: The data shows the electricity balance, measured in gigawatt-hours (GWh). It covers both supply and use of electricity within the energy system. On the supply side, it includes domestic generation and net imports, broken down by source. On the use side, it includes final consumption and system-level components such as transformation inputs and outputs and distribution losses. Final consumption is broken down by sector, including industry, transport, commercial and public services, and households.

Breakdown

- Industry
- Transport
- Commercial
- Household

Methodology

Source data:

Eurostat's [nrg_bal_c](#) - Eurostat data on energy balances, specifically:

Dimension (name and identifier)	Values (name and identifier)
Standard international energy product classification (SIEC) [siec]	Natural gas [G3000]
Unit of measure [unit]	Gigawatt-hour [GWH]
Energy balance [nrg_bal]	Final consumption - industry sector - energy use [FC_IND_E]; Final consumption - transport sector - energy use [FC_TRA_E]; Final consumption - other sectors - commercial and public services - energy use [FC_OTH_CP_E]; Final consumption - other sectors - households - energy use [FC_OTH_HH_E]

ACER processing: No ACER processing, values taken as provided by Eurostat

EU-27 aggregate: EU-27 refers to the aggregated total across EU-27 countries, calculated as the sum of energy balance components, as reported by Eurostat.

2.3. Contract type distribution

Description: This indicator shows the share of natural gas customers by contract type in both the household and non-household segments of the natural gas sector.

It is based on the requirements under Directive (EU) 2024/1788, Article 11(5), which ensures that suppliers provide final customers with transparent information on applicable prices, tariffs, and standard contract terms and conditions, including whether prices are fixed or variable and, where relevant, information on promotions and discounts.

The indicator covers standard retail contract categories reported by national regulatory authorities and mapped into harmonised groups to ensure comparability across countries. Contract types reflect key pricing structures, including fixed and variable pricing, regulated tariffs where applicable, and other market-based arrangements such as spot-indexed or hedged contracts.

Segments

- Household
- Non-household

Breakdown for household customers:

- Market-fixed
- Market-variable
- Regulated
- Other

Breakdown for non-household customers

- Market-spot
- Market futures
- Other

Methodology

Source data: NRA input to questionnaire

- Share of household natural gas customers by contract type
- Share of non-household natural customers by contract type

ACER processing: Responses from NRAs are consolidated and mapped into standardised groups representing the different contract types.

Categorisation for household consumers:

Standardised retail dashboard categories	Original NRA response categories
Market-fixed	Annual/multiannual market-based fixed-price, fixed-term
Market-variable	Market-based monthly/quarterly spot variable
Regulated	Regulated
Other	Other

Categorisation for non-household consumers:

Standardised retail dashboard categories	Original NRA response categories
Market-spot	Market-based with daily spot variable price
Market-futures	Market-based with future-market price hedges
Other	Other

2.4. Customer count

Description:

The number of natural gas customers represents the total number of customers within the natural gas market. In addition to the overall number of household and non-household customers, the data also provides a breakdown by different consumption levels (bands). The number of customers is determined based on the count of metering points.

Breakdown

- Household
 - Band D1: Consumption less than 20 GJ
 - Band D2: Consumption from 20 GJ to 199 GJ
 - Band D3: Consumption 200 GJ or over
- Non-household
 - Band I1: Consumption less than 1 000 GJ
 - Band I2: Consumption from 1 000 GJ to 9 999 GJ
 - Band I3: Consumption from 10 000 GJ to 99 999 GJ
 - Band I4: Consumption from 100 000 GJ to 999 999 GJ
 - Band I5: Consumption from 1 000 000 GJ to 3 999 999 GJ
 - Band I6: Consumption 4 000 000 GJ or over

Methodology

Source data: NRA input to questionnaire

- Number of household gas customers
- Number of non-household gas customers

ACER processing: No adjustment applied - values are used as reported by NRAs.

EU-27 aggregate: EU-27 refers to the aggregated total number of natural gas customers across EU-27 countries, calculated as the sum of household and non-household customers reported by national regulatory authorities. The EU-27 total is shown only where reporting across all Member States is complete.

2.5. Energy use category

Description: This indicator shows the natural gas balance in gigawatt-hours (GWh), covering how gas is consumed, transformed, or lost within the energy system. It breaks down into final consumption for energy and non-energy use, transformation, distribution losses, changes in stock, and net exports.

Breakdown

- Distribution losses
- Transformation
- Final consumption, energy use:
- Final consumption, non-energy use
- Change in stock
- Net exports

Methodology

Source data: Eurostat's nrg_bal_c - Complete energy balances, specifically:

Dimension (name and identifier)	Values (name and identifier)
Standard international energy product classification (SIEC) [siec]	Natural gas [G3000]
Energy balance [nrg_bal]	Imports [IMP]; Exports [EXP]; Change in stock [STK_CHG]; Distribution losses [DL]; Final consumption - energy use [FC_E]; Transformation output [TO]; Transformation input - energy use [TI_E]; Final consumption - non-energy use [FC_NE]
Unit of measure [unit]	Gigawatt-hour [GWH]

ACER processing: Net exports are calculated as exports minus imports. Negative values (net imports) are set to zero. Primary production and change in stock are taken as provided.

Transformation is calculated as transformation input minus transformation output, plus energy sector energy use. For change in stock, positive values (net injections into storage) are shown as use of supply, while negative values (net withdrawals from storage) are set to zero. Distribution losses, final consumption, energy use and non-energy use are taken directly from the source data without further adjustments.

EU-27 aggregate: EU-27 refers to the aggregated total across EU-27 countries, calculated as the sum of energy balance components, as reported by Eurostat.

2.6. Estimated annual household spend

Description: This indicator estimates the annual natural gas expenditure of household customers across different consumption bands. It is calculated by combining representative consumption levels with corresponding average natural gas prices, providing an approximation of annual costs for representative households.

Segments

- All Bands
- Band D1: Consumption less than 20 GJ
- Band D2: Consumption from 20 GJ to 199 GJ
- Band D3: Consumption 200 GJ or over

Methodology

Source data: Eurostat's [nrg_pc_204_c](#): Electricity price components for household consumers specifically:

Dimension (name and identifier)	Values (name and identifier)
Components of energy prices [nrg_prc]	Energy and supply [NRG_SUP]; Network costs [NETC]; Taxes, fees, levies and charges [TAX_FEE_LEV_CHRG]; Value added tax (VAT) [VAT]; Other [OTH]
Currency [currency]	Euro [EUR]
Energy consumption [nrg_cons]	Consumption of GJ - all bands [TOT_GJ]; Consumption less than 20 GJ - band D1 [GJ_LT20]; Consumption from 20 GJ to 199 GJ - band D2 [GJ20-199]; Consumption 200 GJ or over - band D3 [GJ_GE200]

ACER processing:

- **Step 1:** A representative consumption value is assigned to each consumption band. For intermediate bands, the midpoint of the consumption range is used. For the lowest and highest bands, estimated values are applied in a way that offers consistency with the spacing of the other bands.

Consumption bands for household consumer segment and estimated annual average consumption used for the calculation:

Consumption band	Estimated representative annual average consumption
Band D1: Consumption less than 20 GJ	10 GJ
Band D2: Consumption from 20 GJ to 199 GJ	110 GJ
Band D3: Consumption 200 GJ or over	300 GJ

- **Step 2:** The corresponding average final price, which is calculated as the sum of the cost components:

- Energy and supply
- Network costs
- Value added tax (VAT)
- Other Taxes, fees, levies and charges (excluding VAT)

The sum of the different cost components is multiplied with the estimated annual average consumption of each consumption band.

For all bands, the mean household consumption is multiplied by the Eurostat all bands value

EU-27 average: EU-27 refers to the EU-27 average annual household expenditure. It is calculated by first deriving an EU-level unit price for each consumption band as a consumption-weighted average of national unit prices, using Eurostat-reported national consumption weights. For each consumption band, this EU-level unit price is then multiplied by the standardised representative annual consumption.

2.7. Household end-use breakdown

Description: The data shows the distribution of household final natural gas consumption, expressed as percentage shares across different end-use categories. It covers total household energy use, broken down by end-use categories such as cooking, space and water heating, space cooling, lighting and electrical appliances, and other household energy uses.

Breakdown

- Cooking
- Lighting and electrical appliances
- Space cooling
- Space heating
- Water heating
- Other household end use

Methodology

Source data: Eurostat's [nrg_d_hhq](#) - Disaggregated final energy consumption in households, specifically:

Dimension (name and identifier)	Values (name and identifier)
Standard international energy product classification (SIEC) [siec]	Natural gas [G3000]
Energy balance [nrg_bal]	Final consumption - other sectors - households - energy use [FC_OTH_HH_E]; Final consumption - other sectors - households - energy use - space heating [FC_OTH_HH_E_SH]; Final consumption - other sectors - households - energy use - space cooling [FC_OTH_HH_E_SC]; Final consumption - other sectors - households - energy use - water heating [FC_OTH_HH_E_WH]; Final consumption - other sectors - households - energy use - cooking [FC_OTH_HH_E_CK]; Final consumption - other sectors - households - energy use - lighting and electrical appliances [FC_OTH_HH_E_LE]; Final consumption - other sectors - households - energy use - other end use [FC_OTH_HH_E_OE]
Unit of measure [unit]	Gigawatt-hour [GWH]

ACER processing: Each end-use category's contribution is calculated as its share of total household natural gas consumption. This is done by dividing the natural gas consumption of each category (e.g. cooking, space heating, lighting and electrical appliances, etc.) by the sum of natural gas consumption across all household end-use categories.

EU-27 aggregate: EU-27 aggregate refers to the distribution of household natural gas consumption across end-use categories at EU-27 level. It is calculated as the share of each household end-use category in total household natural gas consumption across EU-27 countries.

2.8. Market concentration (HHI)

Description: Market concentration, measured by the Herfindahl–Hirschman Index (HHI), reflects the degree of competition within a market by indicating how market share is distributed among suppliers. It is calculated as the sum of the squared market shares (expressed as percentages) of all suppliers in the market. HHI values below 1,500 generally indicate low concentration, values between 1,500 and 2,500 indicate moderate concentration, and values above 2,500 indicate high concentration.

For the household market, each supplier's market share is calculated as the number of household metering points it serves divided by the total number of household metering points in the country. The HHI is then obtained by squaring these percentage shares and summing them across all suppliers.

For the non-household market, each supplier's market share is calculated as the total volume of natural gas it supplies to non-household customers divided by the total volume supplied in that segment. The HHI is calculated in the same way—by summing the squared percentage shares of all suppliers active in the national non-household market.

Breakdown

- Household
- Non-household

Methodology

Source data: NRA input to questionnaire

- HHI value for market concentration in the household natural gas sector
- HHI value for market concentration in the non-household natural gas sector

ACER processing: No adjustment applied; values are used as reported by NRAs.

2.9. Retail unit price

Description: Unit prices (c€/kWh) for household and non-household customers in the natural gas sector represent the average cost of natural gas supplied, expressed in euro cent per kilowatt-hour. Prices are presented across different consumption bands to reflect variations in usage levels.

The indicator includes a breakdown of annual price components, namely energy and supply costs, network costs, value added tax (VAT), and other taxes, fees, levies, and charges. This allows for a detailed assessment of the structure of final electricity prices.

Segments for household customers

- All bands: consumption of GJ
- Band D1: Consumption less than 20 GJ
- Band D2: Consumption from 20 GJ to 199 GJ
- Band D3: Consumption 200 GJ or over

Segments for non-household customers

- All bands: Consumption of GJ
- Band I1: Consumption less than 1 000 GJ
- Band I2: Consumption from 1 000 GJ to 9 999 GJ
- Band I3: Consumption from 10 000 GJ to 99 999 GJ
- Band I4: Consumption from 100 000 GJ to 999 999 GJ
- Band I5: Consumption from 1 000 000 GJ to 3 999 999 GJ
- Band I6: Consumption 4 000 000 GJ or over

Breakdown

- Energy and supply
- Network costs
- Taxes (incl. VAT), fees, levies and charges
- Allowances

Methodology

Source data:

- Eurostat's [nrg_pc_202_c](#) - Natural gas price components for household consumers, specifically:

Dimension (name and identifier)	Values (name and identifier)
Components of energy prices [nrg_prc]	Energy and supply [NRG_SUP]; Network costs [NETC]; Taxes, fees, levies and charges [TAX_FEE_LEV_CHRG]; Value added tax (VAT) [VAT]; Other [OTH]
Currency [currency]	Euro [EUR]
Energy consumption [nrg_cons]	Consumption of GJ - all bands [TOT_GJ]; Consumption less than 20 GJ - band D1 [GJ_LT20]; Consumption from 20 GJ to 199 GJ - band D2

[GJ20-199]; Consumption 200 GJ or over - band D3 [GJ_GE200]

- Eurostat's [nrg_pc_203_c](#) - Natural gas price components for non-household consumers

Dimension (name and identifier)	Values (name and identifier)
Components of energy prices [nrg_prc]	Energy and supply [NRG_SUP]; Network costs [NETC]; Taxes, fees, levies and charges [TAX_FEE_LEV_CHRG]; Value added tax (VAT) [VAT]; Other [OTH]
Currency [currency]	Euro [EUR]
Energy consumption [nrg_cons]	Consumption of GJ - all bands [TOT_GJ]; Consumption less than 1 000 GJ - band I1 [GJ_LT1000]; Consumption from 1 000 GJ to 9 999 GJ -band I2 [GJ1000-9999]; Consumption from 10 000 GJ to 99 999 GJ - band I3 [GJ10000-99999]; Consumption from 100 000 GJ to 999 999 GJ - band I4 [GJ100000-999999]; Consumption from 1 000 000 GJ to 3 999 999 GJ - band I5 [GJ1000000-3999999]; Consumption 4 000 000 GJ or over - band I6 [GJ_GE4000000]

ACER processing:

- **Step 1:** For each segment, the cost breakdown Energy and supply and network costs are taken while the cost component “Taxes, fees, levies and charges” is split into “VAT”, which is a subcategory of it and “Other taxes”, which is the difference between the cost component and the VAT.
- **Step 2:** The sum of these four cost components makes up the final unit price for each segment.

EU-27 average: EU-27 refers to the EU-27 average unit price and price components as provided by Eurostat. It is calculated as a consumption-weighted average of national unit prices, using Eurostat-reported national natural gas consumption weights.

2.10. Supplier count

Description: The number of natural gas suppliers represents the total count of suppliers operating in the natural gas sector. Only active suppliers are considered, i.e. those participating in the market and offering contracts to final customers, while self-suppliers are excluded.

Breakdown

- Household
- Non-household

Methodology

Source data: NRA input to questionnaire

- Number of active natural gas suppliers for household customers
- Number of active natural gas suppliers for non-household customers
- Number of household natural gas customers
- Number of non-household natural gas customers

ACER processing: No adjustment is applied to the absolute number of suppliers; values are used as reported by NRAs.

2.11. Switching rate

Description: The switching rate represents the share of customers who change their electricity or gas supplier within a given year (in %). It is measured both by the number of metering points and by the volume of natural gas supplied.

Switching rate (metering points): Calculated as the total number of metering points that switched contracts during the reference year divided by the total number of metering points.

Switching rate (volume): Calculated as the total volume of natural gas that switched contracts during the reference year divided by the total volume of natural gas supplied.

Segments

- Household customers
- Non-household customers

Views:

- By metering point
- By volume

Methodology

Source data: NRA input to questionnaire

- Annual switching rate by metering point for household natural gas customers
- Annual switching rate by metering point for non-household natural gas customers
- Annual switching rate by volume for household natural customers
- Annual switching rate by volume for non-household natural customers
- Total annual natural gas consumption of household and non-household customers

ACER processing: No adjustment applied; values are used as reported by NRAs.

EU-27 average: EU-27 refers to the EU-level switching rate across EU-27 countries. For the metering point view, the EU-27 value is calculated as a customer-weighted average using the number of natural gas customers (Indicator 22) as weights. For the volume view, the EU-27 value is calculated as a consumption-weighted average using total natural gas consumption, as reported by NRAs, as weights. The EU-27 values are published only where at least 70% of countries provide the required data for each respective view.

3. Energy

3.1. Household energy expenditure share

Description: This indicator measures the share of total annual household expenditure that is spent on energy (in %), including electricity, gas, and other fuels. It expresses household energy spending as a percentage of overall household final consumption expenditure.

Methodology

Source data: Eurostat's nama_10_cp18 - Household final consumption expenditure by purpose, specifically:

Dimension (name and identifier)	Values (name and identifier)
Classification of individual consumption by purpose (COICOP) 2018 [coicop18]	Electricity, gas and other fuels [CP045]
Unit of measure [unit]	Percentage of total [PC_TOT]

ACER processing: No adjustment applied – values are applied as reported by Eurostat

EU-27 average: EU-27 refers to the EU-27 average household energy expenditure share. It is calculated as a weighted average of national shares using total household final consumption expenditure as weights, as reported by Eurostat.